Outlook 2010: Part III

Tasks, Sharing and Tools

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Outlook 2010

Part III

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Outlook 2010: Part I

Outlook 2010: Part II

Section 9 Tasks

All graphics related to Microsoft in this book is in compliance with Microsoft guidelines and thus permitted by Microsoft.

Objectives:

BY THE END OF THIS SECTION YOU WILL BE ABLE TO:

- Enter Tasks
- Repeat Tasks
- Assign Tasks To Others
- Track Tasks

THE TASKS LIST

A task is an assigned piece of work that must be completed within a certain time, e.g. writing a proposal or reading a report.

➤ **To Open Tasks:**

MOUSE

1. In the **NAVIGATION BAR** click **TASKS**.

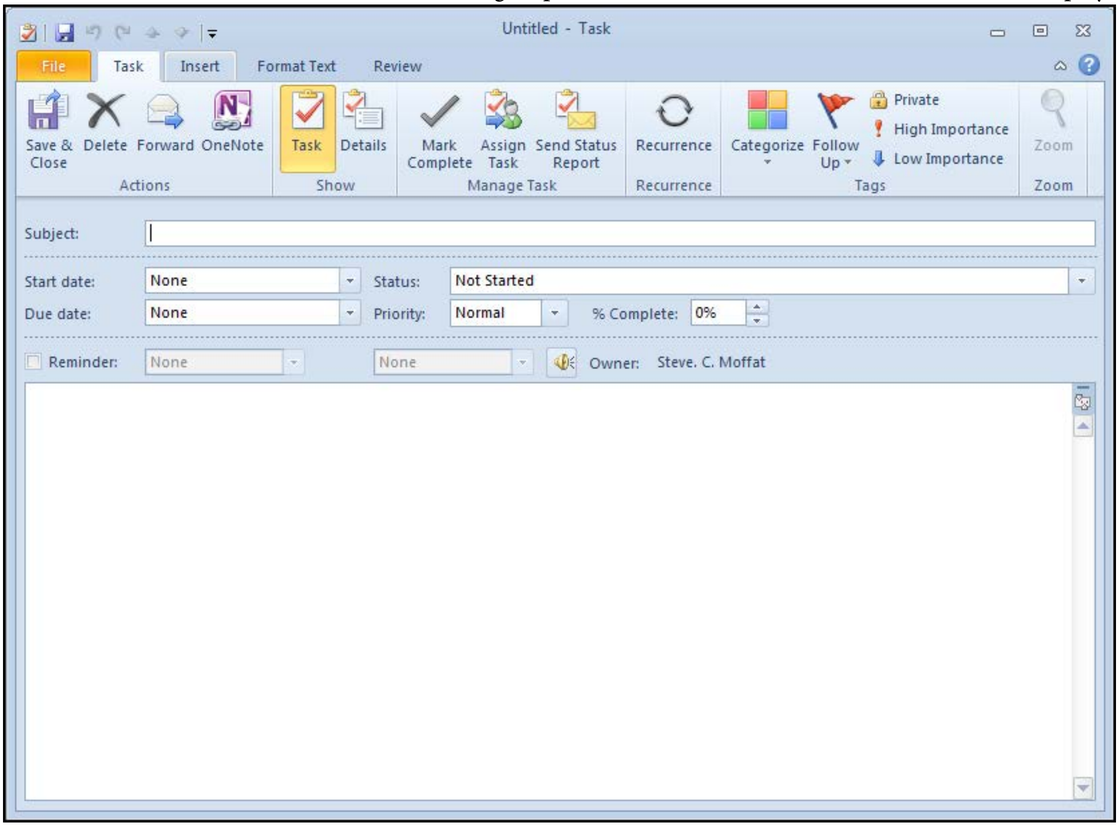
Creating Tasks

A task can occur once or be repeated as a recurring task. A recurring task can repeat at regular intervals or based on the dates the user marks the task to be completed.

➤ **To Create A Task:**

MOUSE

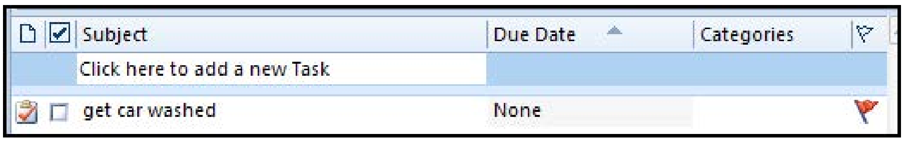
1. Click the **NEW TASK** button in the **NEW** group on the **HOME** ribbon The New Task form displays.



2. Enter a subject
3. Enter a start and due date
4. Set a reminder by checking the reminder checkbox
5. Set a category
6. Set a flag if necessary
7. Set an importance level for the task
8. Click **SAVE AND CLOSE** to create the task
9. The task displays in the Task list.

Options	Description
SUBJECT	Description of the task.
DUE DATE	Indicates whether or not a task starts and ends at a specific time. The AutoDate feature can be used when entering the due date.
STATUS	Indicates the status of the task, e.g. in progress. The status is displayed when sending a status report.
PRIORITY	Sets the importance level of the task as high, normal, or low. By default, tasks are assigned normal priority.
% COMPLETE	The percentage of the task that is finished.
REMINDER	Displays a reminder for the item.
OWNER	The person who created the task. If the task is sent to another person, that person becomes the owner of the task.
CATEGORIES	Displays words to find or group related items.
PRIVATE	Hides the item so others who have access to this folder can not see it.

<u>OR</u>



1. In the Task list, click **CLICK HERE TO ADD A NEW TASK**
2. Type a task description.
3. Press **[ENTER]**.to create task
4. Double click the task to open
5. Set options mentioned previously.
6. Click **SAVE AND CLOSE**

Recurring Tasks

Recurring tasks like appointments are tasks that need to be done regularly like filling the paper tray of the printer every morning there is no need to keep creating it just create a recurring task and as one is marked completed Outlook will recreate the task for the next day. And so on

➢ **To Create A Recurring Task:**

MENU

1. Click the **NEW TASK** button in the **NEW** group on the **HOME** ribbon The New Task form displays.

2. In the **SUBJECT** box, type a task description.
3. Choose options required, e.g. due date.
4. Click the **RECURRENCE** button.
5. Set the recurring options required.
6. Choose **OK**.

- *A note is displayed in the lnfobar indicating the specifics of the recurring task and when the first occurrence of the task is. due.*

7. Click **SAVE AND CLOSE**
   The recurring task displays in the Task list with a recurring task symbol attached to it.

- *Please remember that only tasks that have a due date (or a follow up flag) will appear in your to do pane,*

Editing Tasks

A task can be edited directly in the Task list or using the Task form.

➢ **To Edit A Task In The Task Form:**

MOUSE

1. In the Task list, double-click on the task to edit The Task form displays.
2. Edit the task as required. e.g. change the due date.
3. Click **SAVE AND CLOSE**

<u>To Edit A Task In The Task List:</u>

<u>MOUSE</u>

4. In the Task list, click in the column to edit.

- *Clicking in the Subject column of a specific task will display the insertion point and allow the user to add and delete text. Clicking in many of the other columns of a specific task will display a drop-down arrow. The drop-down arrow can be used to display options for changing the task information.*

5. Edit the task as required.

Deleting A Task

If the user decides that a task should no longer remain in the Task list, they can delete it.

➢ **<u>To Delete A Task:</u>**

<u>MENU</u>

1. In the Task list, select the task no longer required.
2. Choose **DELETE** from the home ribbon.

<u>OR</u>

3. Click the right mouse button on the selected task, choose **DELETE**.

<u>MOUSE</u>

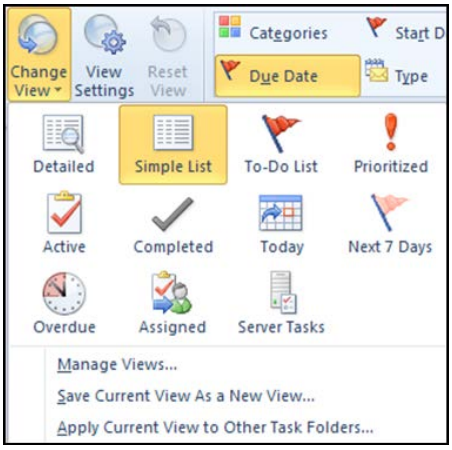
4. In the Task list,open the task no longer required.
5. Choose **DELETE** from the task ribbon.

Viewing Tasks

The default view for the Tasks folder is Simple List. This view displays very few details about a task. Outlook 2010 allows the Tasks folder display to be altered using one of the following views:

View	Description
Simple List	Displays a list with only a few details allowing the user to see at a glance the tasks that are complete.
Detailed List	Displays a list that shows many details about each task. Including priority and percentage complete.
Active Tasks	Displays a list that shows only incomplete tasks, including ones that are overdue.
Next Seven Days	Displays a list that shows only the tasks that are due in the next seven days.
Overdue Tasks	Displays a list that shows only the tasks that are overdue.
By Category*	Displays a list, grouped by category and sorted by due date within each category.
Assigned	Displays a list that shows only the tasks that have been assigned to others, sorted by task owner and due date.
By Person Responsible*	Displays a list, grouped by task owner and sorted by due date for each task owner.
Completed Tasks	Displays a list that shows only the tasks that have been marked complete.
Task Timeline	Represented by icons on a timeline, arranged in chronological order by start date. Tasks without start dates are arranged by due date.
Prioritized	Ordered by importance and due date
Today	Shows todays tasks

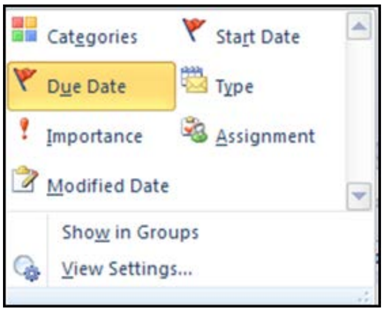
*Signifies that this is a sort order in a view.



➢ **To Change View:**

MENU

1. In the Tasks folder, choose the **VIEW** ribbon, **CURRENT VIEW** group **CHANGE VIEW**
2. Choose the view required.
3. After selecting the view you may wish to select the sort order of your tasks.
4. In the arrangement group on the view ribbon use the drop down arrow to select a group/sort order for your task list

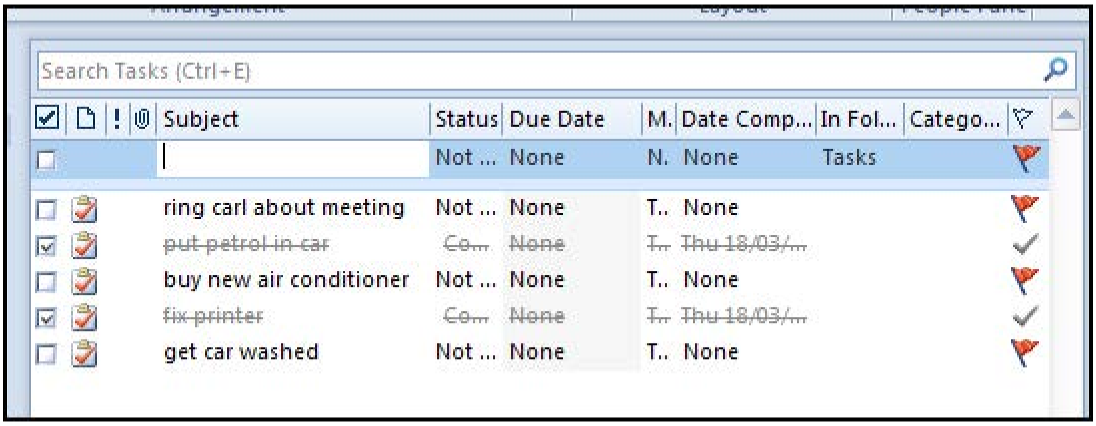


5. Select again and this time select show in groups to group by the selected option.
   E.G. You may still sort by due date but showing in groups allows it to be grouped by importance or category etc.

Other Task Actions

Marking Tasks As Complete

Once a task has been completed, the task can then be marked as complete. When a task is marked as complete, it remains in the Task list. A tick displays in the Completed column of the Task list and a line is displayed through the task.



➢ **<u>To Mark A Task As Complete:</u>**

<u>MOUSE</u>

1. In the Task list, double-click the task to Open the task.
2. In the **MANAGE TASKS** group, click**MARK COMPLETE**.
3. Click **SAVE AND CLOSE** A tick displays in the Completed column of the Task list and a line is displayed through the task.

<u>OR</u>

1. In the Task list, click the checkbox in the Completed column of the required task.
2. A tick displays in the Completed column of the Task list and a line is displayed through the task.

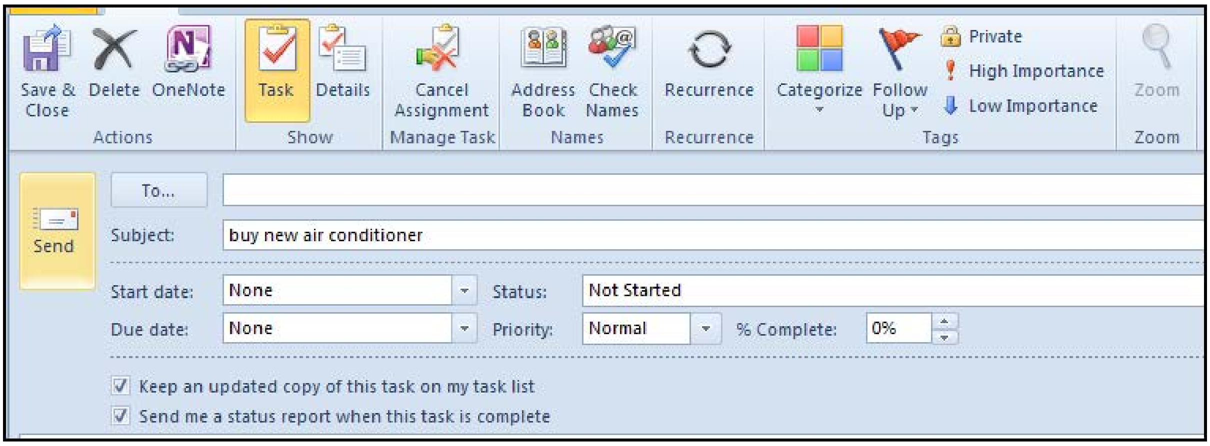
Assigning Tasks

Tasks can be assigned to other users. Before the user can assign a task to another user, they must send a task request. Once a task request is sent, the user is no longer the task's owner. However, the user can keep an updated copy of the task in their Task list and request a status report on the task when it is complete.

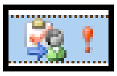
To Create A Task Request:

MENU

1. Create a new task as previously explained The Task form displays.
2. In the Subject box, type a task description.
3. Choose the options required, e.g. due date.
4. In the manage tasks group click the assign task button.
5. The task form changes to an e-mail form with a to box
6. Enter the recipient name you wish to assign the task to and use the check name button if necessary.



7. Please note the check boxes that have appeared under the task information
8. To keep an updated copy of the task in the Task list, ensure the **KEEP AN UPDATED COPY OF THIS TASK ON MY TASK LIST** box is ticked.
9. To receive a status report when this task is complete, ensure that the **SEND ME A STATUS REPORT WHEN THIS TASK IS COMPLETE BOX** is ticked.
10. Click **SEND** to assign the task to this individual.



11. In the Task list, a symbol indicating that the task has been assigned to another person displays to the left of the task.

Accepting / Rejecting Tasks

When the task request is received, the receiver becomes the temporary owner of the task. The receiver can accept the task, decline the task, or assign the task to someone else. If the receiver accepts the task, they become the new permanent owner and the only person that can make changes to the task. If the receiver declines the task, they have the opportunity to give a reason why, and the task is returned to the person who sent the task request.

A Task Request displays in the Inbox as a mail message with a symbol attached to it.

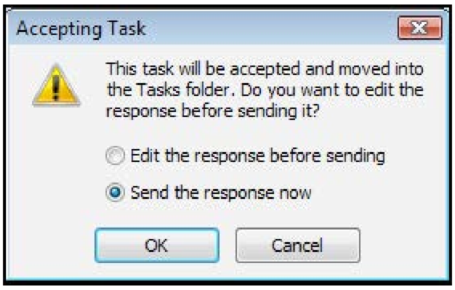
➢ **To Accept A Task Request:**

MOUSE

1. In the reading pane click **ACCEPT**

OR

1. In the Inbox folder, open the message that contains the task request. The Task form displays.



2. Click **ACCEPT**.
3. The **ACCEPTING TASKS** dialog box displays.
4. Click **OK** to send automatic response

OR

5. To accept and return a comment, choose Edit the response before sending, choose **OK**, type the comment required in the email that appears and click the **SEND** button.

The mail message is removed from the receiver's Inbox and added to their Task list in the Tasks folder. In the receiver's Tasks folder, a symbol displays to the left of the task, indicating that the task has been assigned to them by another person.

The task requester receives a mail message in their inbox with an "accepted" symbol and a note attached indicating that the assigned task was accepted. This message can be opened in the same way as any other mail message. Once the message has been opened it is automatically removed from the requester's Inbox.

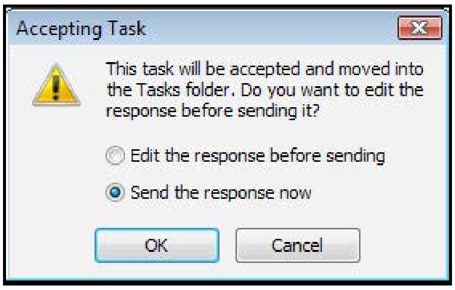
➢ **To Decline A Task Request:**

MOUSE

1. In the reading pane click **DECLINE**

OR

2. In the Inbox folder, open the message that contains the task request. The Task form displays.



3. Click **DECLINE**.
4. The **ACCEPTING TASKS** dialog box displays.
5. Choose send the response now and Click **OK** to send automatic response

OR

6. To decline and return a comment, choose Edit the response before sending, choose **OK**, type the comment required, choose the Send button.

The mail message is automatically removed from the receiver's Inbox. The task requester receives a mail message in their Inbox with a "Declined" symbol, and a note attached indicating that the assigned task was declined. This message can be opened in the same way as any other mail message. Once the message has been opened it is automatically removed from the requester's Inbox.

➢ <u>**To Assign A Task Request To Someone Else:**</u>

<u>**MOUSE**</u>

1. In the Inbox folder, open the message that contains the task request. The Task form displays.

2. Click **ASSIGN TASK**.
3. In the **TO** box, add the name of the person to assign the task to.
4. To keep an updated copy of the task in the Task list, ensure the **KEEP AN UPDATED COPY OF THIS TASK ON MY TASK LIST** box is ticked.
5. To receive a status report when this task is complete, ensure that the **SEND ME A STATUS REPORT WHEN THIS TASK IS COMPLETE** box is ticked.
6. Click **SEND**.

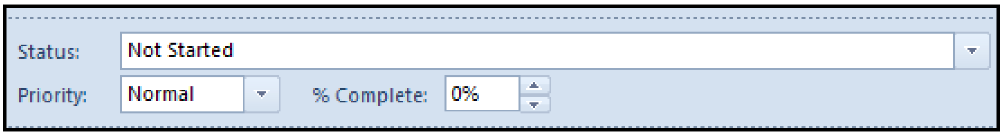
Tracking Tasks

Every time you change the status of the task you have been assign a report and change of status email is sent to the person who assigned the task to you so that they can keep track of the progress of the task assigned.

➢ **To Change Status Of Task**

MOUSE

1. Open the assigned task



2. Change the status from the drop down box

3. Enter a percentage complete

OR

4. Mark task complete
5. Click on the **SEND STATUS REPORT** button
6. An email is generated to the person who assigned the task enter any pertinent information for them and click send.
7. If **YOU** mark the task complete they will receive an email update and upon reading it will mark the task complete in **THEIR** task list.

Section 10 Notes

Objectives:

BY THE END OF THIS SECTION YOU WILL BE ABLE TO:

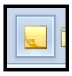
- Create, Edit And Delete Notes
- Change The View Of Notes
- Send Notes To Others
- Save Notes On Your Desktop

Creating, Editing and Deleting Notes

Notes are the electronic equivalent of paper sticky notes. Use notes to write down questions, ideas, reminders, and anything you would write on note paper. You can leave notes open on the screen while you work. This is especially convenient when you're using notes for storing bits of information you may need later, such as directions or text you want to reuse in other items or documents.

➢ **TO OPEN NOTES:**

MOUSE



1. In the **NAVIGATION PANE**, click **NOTES**

- *Notes display in the Notes list. By default, the Notes folder automatically opens in Icons view.*

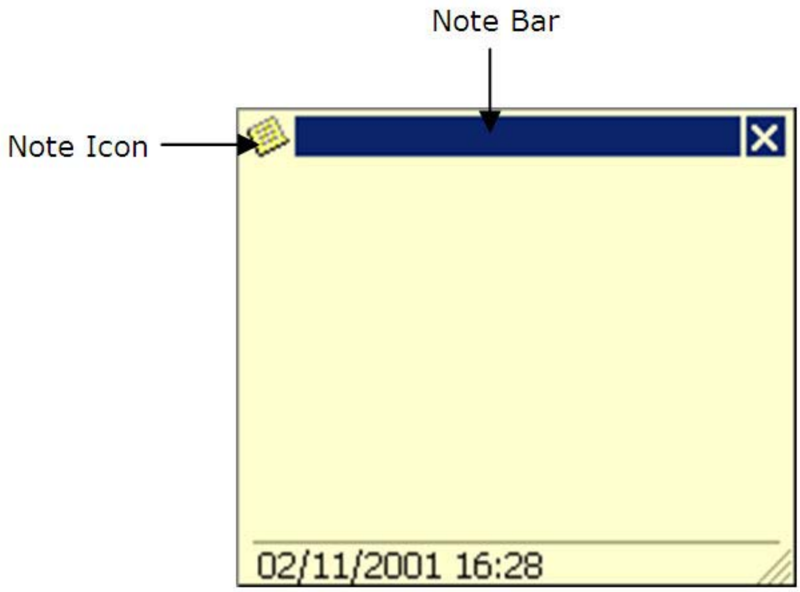
When the user creates a new note, a window displays in which the note is typed. By default, the date and time the note was created displays at the bottom of the Note window. The note can be moved and resized on screen, and the colour can be altered if required. Once the user has created a note, it can be left open on screen while the user works.

Create a note

➢ **To Create A New Note:**

MOUSE

1. Click the **NEW NOTE** button in the **NEW** group on the **HOME** ribbonaNew Note displays.



OR

2. In the Notes folder, double click on main view area to create a note

OR

3. Right click in main view area and from the shortcut menu select **NEW NOTE**.
4. Type the text required.
5. To close the note, click. The cross in the top right hand corner The note is automatically saved and displayed in the Notes list.

- *Notes are arranged in the Notes list from left to right by creation date.*
- *If required the user can leave a note open and work in another folder, e.g. the Contacts folder. When the user opens another folder, the note is removed from screen. To quickly redisplay the note, click on it in the Taskbar.*

➢ **To Edit A Note:**

MENU

6. Double click on the note you wish to edit it opens.
7. Edit the text as required.
8. To close the note, click the cross in the top right hanmd corner to save the changes.

Moving a note

➢ <u>**To Move A Note around the screen:**</u>

<u>**MOUSE**</u>

1. Open the note to move.
2. Position the mouse on the **NOTE BAR** at the top of the Note window. The mouse changes to an arrow head.
3. Click and drag the note to the new location.
4. Release the mouse.

➢ **<u>To Move A Note To Your Desktop</u>**

<u>MOUSE</u>

1. Minimise other windows and resize the outlook window so you are able to see the desktop.
2. Go to the notes folder
3. Click and drag the note you wish to move to the new location on your desktop and Release the mouse.

- *You are able to open the note even though outlook may seem to be closed BUT outlook WILL connect to the message location in the background. If using personal folders or offline folders this is fine (stored locally). If however your message store and profile are only on an exchange server you may have difficulty connecting to your profile. (basically if outlook cannot open you will not be able to read your note.*

Editing Notes

There are only a few options for editing a note such as its size and colour. And the font style of the note which is done through options the default colour is yellow as colours are linked with categories in 2010. And a yellow note by default has no categories applied. The next subsection will look at note options

➢ **<u>To Resize A Note:</u>**

<u>MOUSE</u>

1. Open the note to resize.
2. Position the mouse on the bottom right corner of the Note window. The mouse changes to a double-headed arrow.
3. Click and drag inwards to decrease the note size.
4. Click and drag outwards to increase the note size.
5. Release the mouse.

➢ **<u>To Change A Note's Colour: (Categorize)</u>**

<u>MOUSE</u>

1. Open the note required.
2. Click the Note icon at the top of the Note window.
3. A drop-down menu displays.Choose **CATEGORIZE**.
4. Choose the category or categories required as previously discussed

<u>OR</u>

5. Right click the closed note in the notes folder
6. Choose **CATEGORIZE** then select the category or categories required as previously discussed

➢ **To Delete A Note:**

MENU

1. In the Notes folder, select the note no longer required.
2. Click on the **DELETE** button on the home ribbon.

OR

3. Click the right mouse button on the selected note, choose **DELETE**.

OR

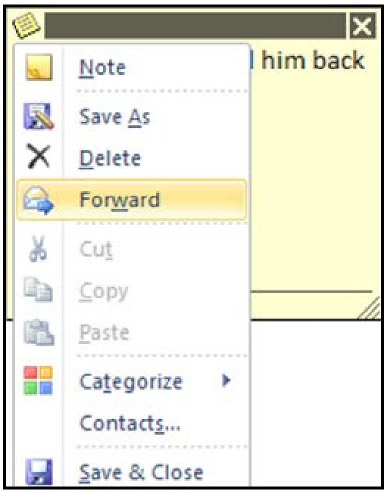
4. Select the note or notes to delete
5. Press the **DELETE** key on your keyboard

Forwarding Notes

A useful way of using notes is after creating them from say a phone conversation or adding a useful bit of information is to pass them around to your work colleagues.

➢ **To Forward A Note:**

MOUSE



1. Open the note to forward to others.
2. Click on the note icon.
3. Click **FORWARD**, a new message window appears containing the note.

OR

4. After selecting one or more notes in the folder right click and from the shortcut menu select forward a new message will appear contining the selected notes.
5. Complete the required fields and send.

➢ **To save a received note**

MOUSE

1. When you open an email containing a note ensure the message is not full screen.
2. Drag the note (an attachment in the email) over the notes folder icon (in the navigation pane of outlook)
3. Release mouse.

- *You could use the save attachments option but this would save the note as a message outside the outlook folders in the normal file system of your computer.*

Other Note Actions

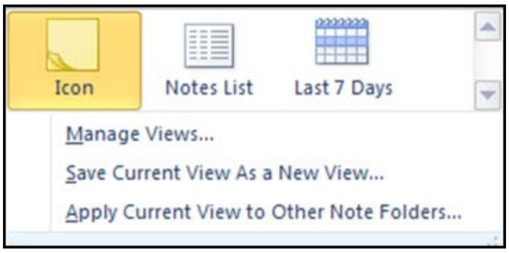
Changing the view

Outlook 2010 allows the Notes folder display to be altered using one of the following views:

View	Description
Icons	Displays notes represented by icons arranged from left to right by creation date.
Notes list	Displays notes in a list sorted by creation date.
Last Seven Days	Displays notes created during the last seven days, in a list.

➢ **To Change Notes View:**

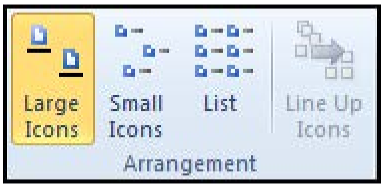
MOUSE



1. In the Notes folder on the **HOME** ribbon, in the**CURRENT VIEW** groupselect the drop down arrow on the views.
2. Choose the view required.

➢ **To change how the icons appear**

MOUSE



1. In the Notes folder on the **VIEW** ribbon, in the**ARRANGEMENT** groupselect how you wish your notes to appear.

- *As in the emails tasks and calendar the views can be modified using filtering and sorting*

Modifying a view

Although the options for modifying a view in notes is more limited due to their content we can still modyfy a notes view to some extent

➢ **To modify a view**

MOUSE

1. On the **VIEW** ribbon in the **CURRENT VIEW** group click on the **VIEW SETTINGS** button.
2. The **ADVANCED VIEW SETTINGS** dialog appears.
3. Filter or sort as described previously in other sections
4. Click **OK**

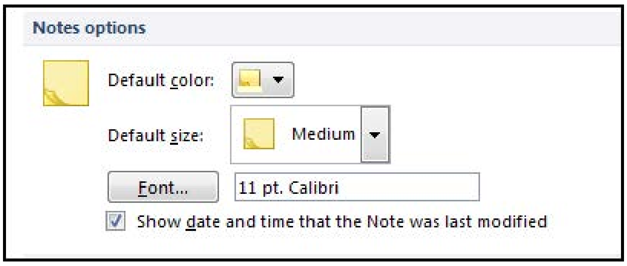
Changing Notes Options

The user can quickly alter the way in which all new notes display, e.g. alter the colour, size and font.

Notes defaults	Description
Color	Allows the user to alter the colour of all new notes. Yellow is the default. Changing this option will not affect any existing notes only new ones.
Size	Allows the user to alter the size of all new notes to smart, medium or large. Medium is the default. Changing this option will not affect any existing notes only new ones.
Font	Specifies the default font used for notes. Changing this default will affect all new and existing notes.
Show date and time	If selected, shows the date and time at the bottom of the note, indicating when it was created or last changed. Changing this default will affect all new and existing notes.

➢ **To Change Notes Defaults:**

MENU



1. Choose **FILE** tab, **OPTIONS**.
2. Choose the **NOTES AND JOURNAL** section.
3. Choose the options required. Choose **OK**.

- *Choosing a default colour at this point does not apply a colour category to your notes this is merely for appearance sake.*

Section 11 Sharing Folders

Objectives:

BY THE END OF THIS SECTION YOU WILL BE ABLE TO:

- Delegate Access
- Open Other's Calendar
- Share Your Private Folders
- Add Other's Mailbox To You Folder List

SHARING Mailbox and FOLDERS

Just as you might have an assistant who helps you manage your incoming paper mail, Microsoft Outlook provides similar functionality by making it possible for you to give another person access to your Inbox and any other Outlook folder you want. The process of granting someone permission to open your folders, read and create items, and respond to requests for you is called assigning folder permissions.

As the person granting permission, you determine the level of access the delegate has. You can give a delegate permission to read items in your folders, or to read, create, modify, and delete items. You can give a delegate permission to send mail and to respond to mail on your behalf. The delegate can also organize meetings on your behalf and respond to meeting requests and task requests sent to you. If you grant someone access to your folders, that delegate has access to the personal items in the folders.

If you want to assign permissions, your mail must be delivered to your mailbox on the server, not to a personal folders file on your hard disk.

Permission Levels

With author or editor permissions, the delegate has send-on-behalf-of permission. Sent messages contain both the manager's and delegate's names. Message recipients see the manager's name in the Sent On Behalf Of box and the delegate's name in the From box.

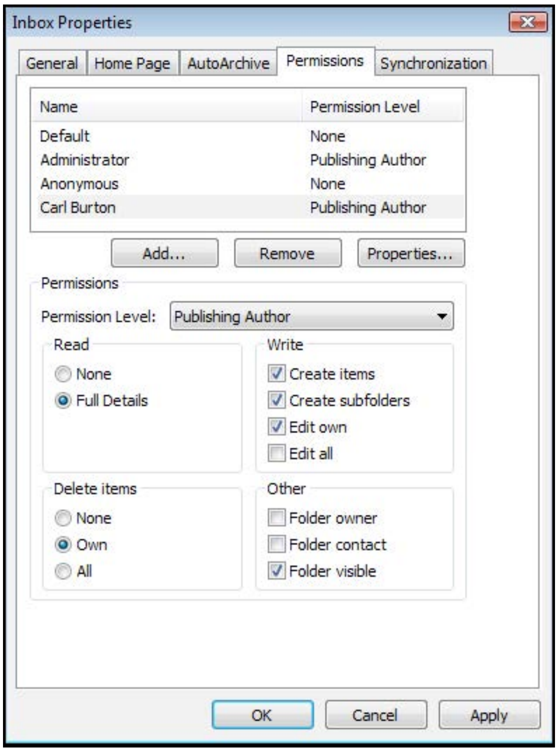
If a delegate needs permission to deal with meeting requests and responses only, the manager can select the Send meeting requests and responses only to my delegates, not to me check box on the Delegates tab and does not need to grant permission to his Inbox. Meeting requests and responses will go directly to the delegate's Inbox. The delegate will, however, need editor permission to the manager's Calendar folder, because once they respond to the meeting on behalf of the manager, the meeting is automatically added to the manager's Calendar folder

To give someone the authority to open your mailfolders in addition to their own rather than just access to open say your inbox you MUST also set permissions on your mailfolder as well as individually assign permissions to the folders you wish them to access for example your calendar and inbox. Then when they choose to open the extra mailbox they will have the necessary permissions to open up your mailbox and the folders you set permissions against.

Following are the some of the levels of permission that a delegate can be granted:

Access	Permission
Owner	Create, read, modify, and delete all items and files, and create subfolders. As the folder owner, you can change the permission levels others have for the folder. (Does not apply to delegates.)
Publishing Editor	Create, read, modify, and delete all items and files, and create subfolders. (Does not apply to delegates.)
Editor	Create, read, modify, and delete all items and files
Publishing Author	Create and read items and files, create subfolders, and modify and delete items and files you create. (Does not apply to delegates.)
Author	Create and read items and files, and modify and delete items and files you create
Contributor	Create items and files only. The contents of the folder do not appear. (Does not apply to delegates.)
Reviewer	Read items and files only
Custom	Perform activities defined by the folder owner. (Does not apply to delegates.)
None	You have no permission. You can't open the folder

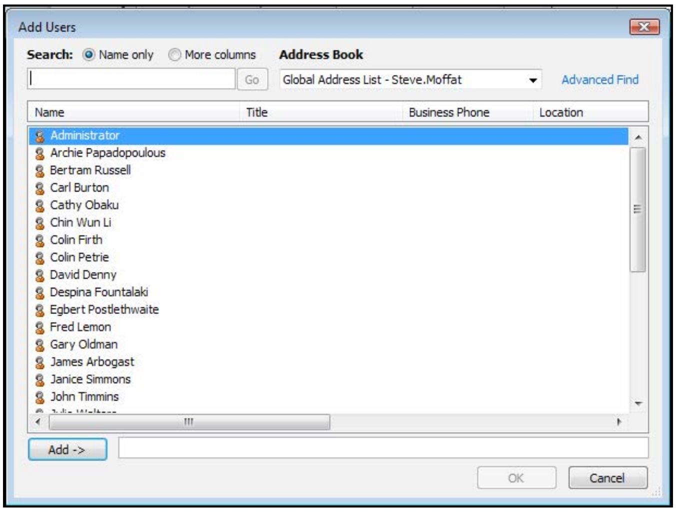
Setting Permissions (Method 1)



➤ **<u>To Set Permissions On Inbox</u>**

<u>MOUSE</u>

1. Go to the Inbox
2. On the **FOLDER** ribbon in the **PROPERTIES GROUP** group click on **FOLDER PERMISSIONS**.
3. A dialog will appear showing the permissions for the inbox.
4. The default permissions should be none. (for inbox security this should be left unchanged and NEVER removed)
5. To add The people you to access your mailbox and give them permissions click on the **ADD** button a dialog will open.



6. Just like an address book the dialog allows you to select people use the **CTRL** key to select multiple members and click on the **ADD** button so they appear in the box at the bottom.
7. When all members have been selected that you wish to assign permission to then click **OK**.
8. All members will appear as in the top of the permissions dialog box
9. Select from the drop down box under the **ADD/ REMOVE** buttons a permission level.

- *Do not assign OWNER permission levels to your inbox unless you are happy with the fact that this removes ANY privacy options and allows the person to assign permissions to others*

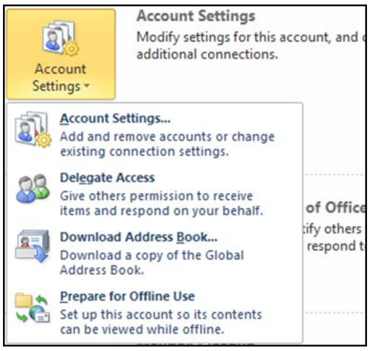
10. In the lower part of the dialog you may fine tune what you would wish them to do.
11. Click **OK** when finished to apply permissions to those people.

Delegate Access (Method 2)

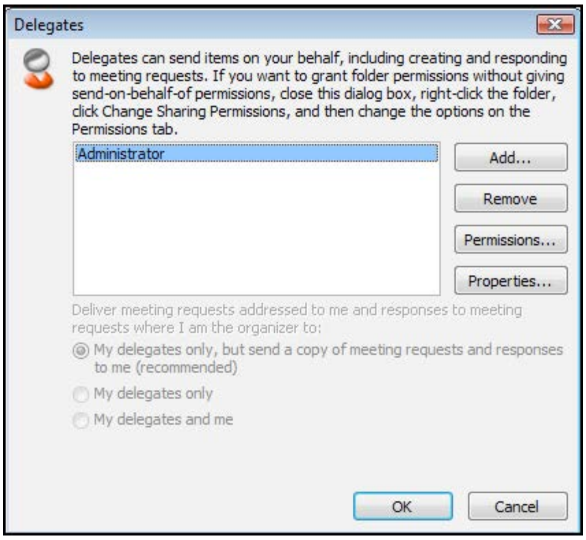
Another method of sharing but this allows people to send items on your behalf.

➢ **To Grant Permissions To Others:**

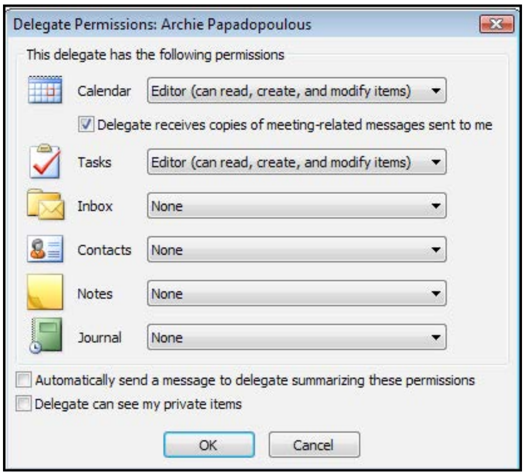
MENU



1. On the ribbon go to the **FILE** Tab.
2. Click on the **ACCOUNT SETTINGS** button
3. From the menu choose **DELEGATE ACCESS** a dialog appears



4. Click **ADD** and select the name from relevant the address book and click **OK**.
5. Another dialog will appear to allow you to set the permissions for this user to access your folders.
6. To send a message to notify the delegate of the changed permissions, select the **AUTOMATICALLY SEND A MESSAGE TO DELEGATE SUMMARIZING THESE PERMISSIONS** check box.
7. Click **OK.**
8. Make a selection as to whether delegates only or delegates and yourself receive meeting requests where you are the organiser.
9. Click **OK.**to apply the permissions.



- **<u>To edit a user permissions</u>**

1. On the ribbon go to the **FILE** Tab.
2. Click on the **ACCOUNT SETTINGS** button
3. From the menu choose **DELEGATE ACCESS** a dialog appears
4. Select a user in the **DELEGATES** dialog and click **PERMISSIONS**.
5. Edit the permissions click **OK** and **OK** again to apply permissions

Setting Permissionson Folders (Method 3)

➢ **To Share A Folder Using Permissions:**

MOUSE

1. Go to the **FOLDERS** icon in the navigation pane
2. In the Navigation Pane, right-click the private or public folder you want to share, and then click **PROPERTIES** on the shortcut menu.

- *You must have Owner permission for a public folder to set sharing permissions for the folder. You can set permissions for only one folder at a time.*

3. Click the **PERMISSIONS** tab.
4. Click **ADD**.
5. In the **TYPE NAME** or select from list box, enter the name of the person you want to grant sharing permissions to.
6. Click **ADD**, and then click **OK**.
7. In the **NAME** box, click the name of the person you just added.
8. Under **PERMISSIONS**, choose the settings you want and click **OK**.

- *For public folders, you can assign everyone who has access to the folder the same permissions by clicking Default in the Name box.*

Item	Description
Name/Permission Level	Displays user names and their permissions for the folder. The default permission is the role granted to all general users.
Add	Selects user, distribution list, and public folder names to add to the Name/Role box.
Remove	Removes the selected name from the Name/Role box.
Properties	Displays details about the selected name.
Permissions	Specifies a role for the selected name. When you select a role, the permissions associated with that role are automatically selected. When you select individual permissions, the matching role name appears in the Roles box. If there is no matching role, Custom appears. You cannot select Custom; it appears automatically.
Roles	Specifies a role for the selected name in the Name/Role box.
Owner	Grants all permissions in the folder. Create, read, modify, and delete all items and files and create subfolders. The owner can also change permission levels that others have for the folder.

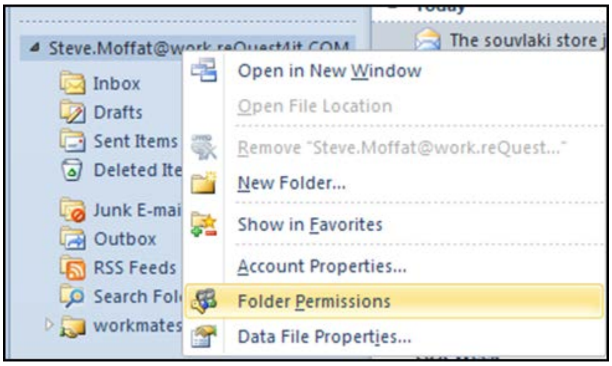
Publishing Editor	Grants permission to create, read, modify and delete all items and files, and create subfolders.
Editor	Grants permission to create, read, modify, and delete all items and files.
Publishing Author	Grants permission to create and read items and files, modify and delete items and files you create, and create subfolders.
Author	Grants permission to create and read items and files, and modify and delete items and files you create.
Nonediting Author	Grants permission to create and read items and files.
Reviewer	Grants permission to read items and files only.
Contributor	Grants permission to create items and files only. The contents of the folder do not appear.
None	Grants no permission in the folder. Use this as the default permission when you want to limit the folder audience to only users you specifically add to the Name/Role box.
Create Items	Grants permission to post items in the folder.
Read Items	Grants permission to open any item in the folder.
Create Subfolder	Grants permission to create subfolders in the folder.
Folder Owner	Grants all permissions in the folder.
Folder Contact	Grants folder contact status. Folder contacts receive automated notifications from the folder, such as replication conflict messages, as well as requests from users for additional permissions or other changes in the folder.
Folder visible	Grants permission to see the folder.
Edit Items	Select None, Own or All.
None	Does not allow changes to any item.
Own	Allows you to modify items you create.
All	Allows you to modify any item.
Delete Items	Select None, Own or All.
None	Does not allow you to delete any item.
Own	Allows you to delete items you create.
All	Allows you to delete any item.
Apply	Applies the changes you make while the dialog box is still open.

Add permissions to mailbox

If someone wishes to another users mailbox to their navigation pane as opposed to accessing a folder ad-hoc then as was mentioned earlier permissions need to be assigned to the mailbox itself.

➢ <u>**To add mailbox permissions**</u>

<u>MOUSE</u>

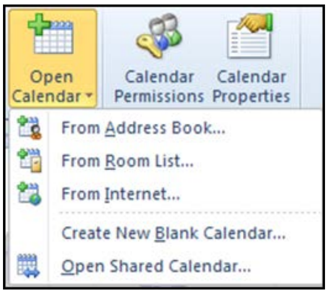


1. In the navigation pane go to the root folder that carries your name.
2. Right click and from the menu choose Folder permissions
3. A dialog will open at the permissions tab
4. Add users as mentioned previously
5. Set permission level for user as already described
6. Click **OK**

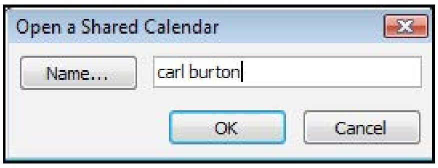
Accessing Shared Folders

- **TO ACCESS A FOLDER**

MOUSE



1. On the Folder ribbon in the share group click on open calendar from the list select Open shared calendar.
2. A dialog will appear enter the users name that you wish to open the calender from and click on ok, or click on the name button and select it from the address list.



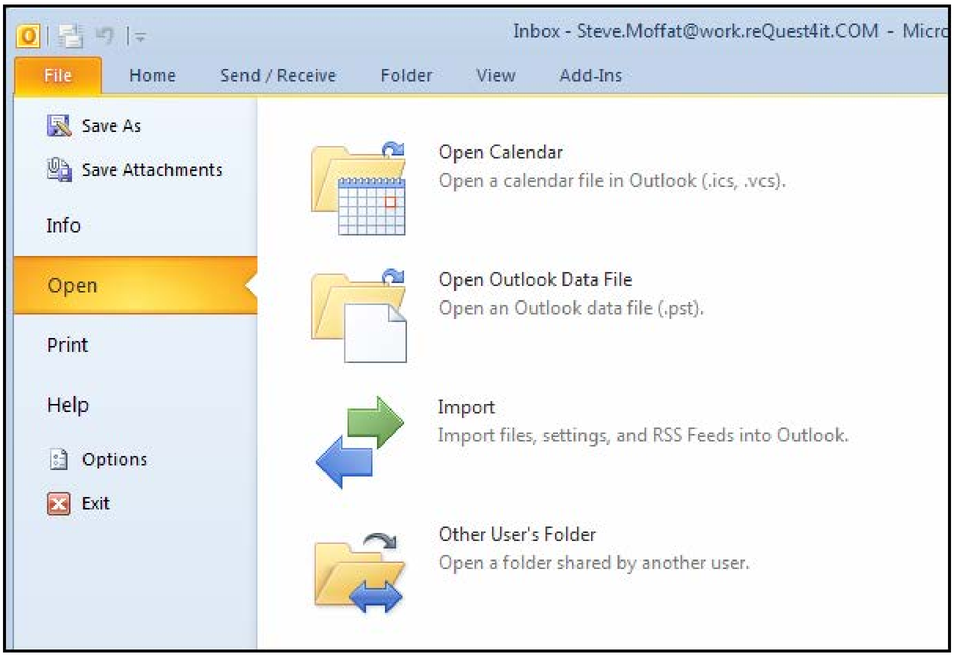
3. The calendar will appear next to yours

OR

- **To open any other folder type**

MOUSE

1. Go to the **FILE** tab on the ribbon and click **OPEN**
2. In the main part of the windowclick on open other user's folder.



3. Enter a name or click **NAME** and select a user from address book
4. Choose the type of folder you wish to open and have permission to.
5. Click **OK.**
6. The folder will temporarily open but if you click in another folder the folder will not be available and will have to be reopened.

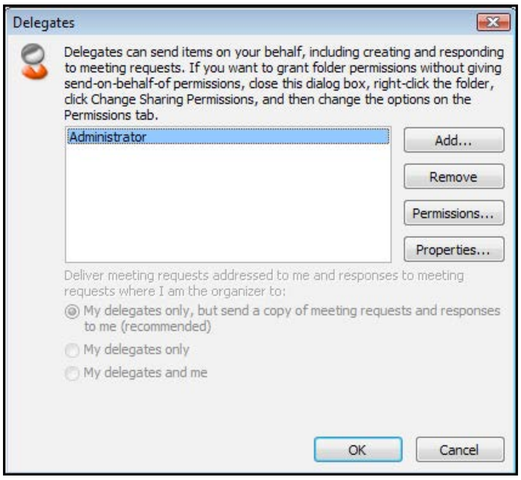
Remove Sharing Permissions For A Folder

➢ **<u>To Remove Sharing Permission:</u>**

<u>MOUSE</u>

1. In the Navigation Pane, right-click the folder you want, and then click **PROPERTIES** on the shortcut menu.
2. Click the **PERMISSIONS** tab.
3. In the **NAME** box, click the name of the person you want to remove sharing permission for.
4. Click **REMOVE**.

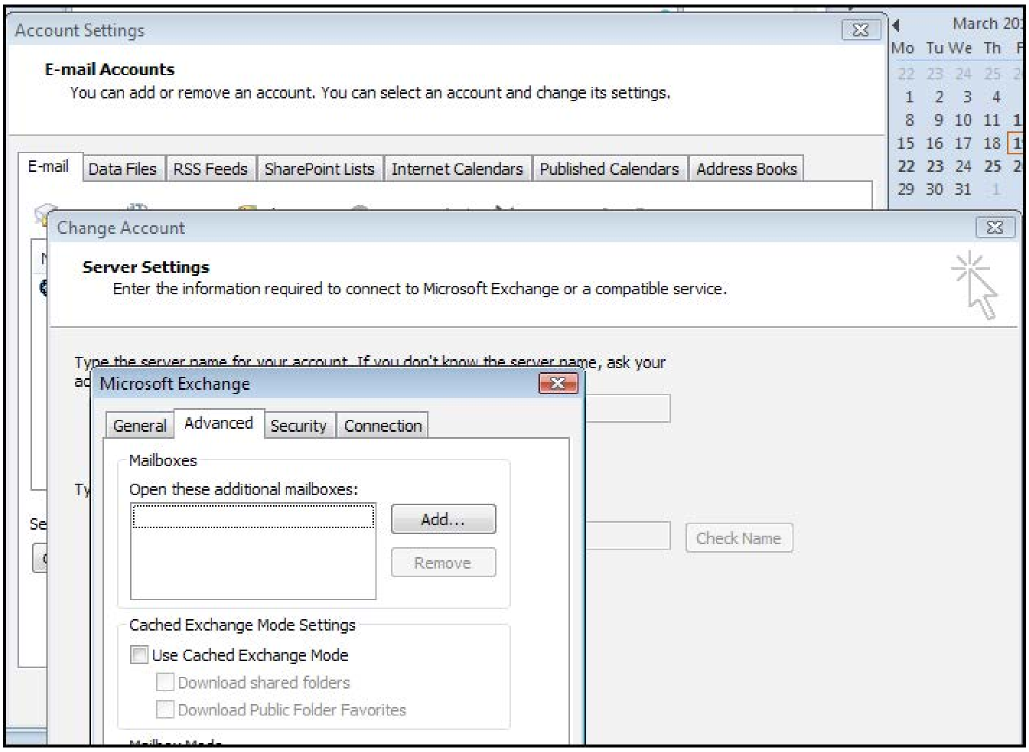
OR



5. On the ribbon go to the **FILE** Tab.
6. Click on the **ACCOUNT SETTINGS** button
7. From the menu choose **DELEGATE ACCESS** a dialog appears
8. Select the user you want to remove permissions for
9. Click **REMOVE**
10. Click **OK**

Add users Folder(s) To The Navigation Pane

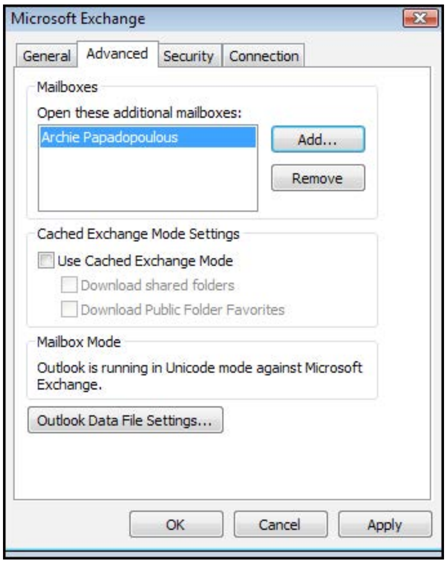
In order for you to import someone else's folder list, they must also be using Microsoft Exchange Server. They also must have given you permission to see their main mailbox.



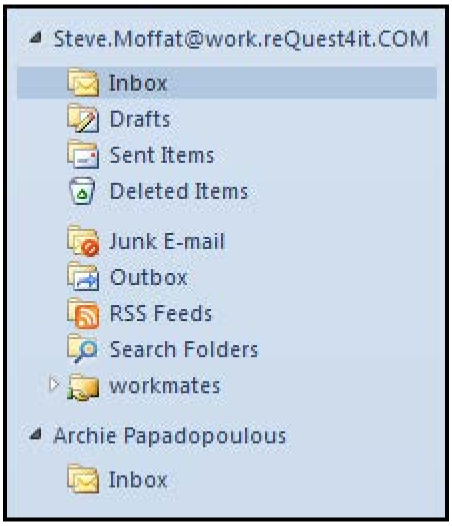
- *Picture on previous page refers to these instructions*

➢ **To Add Somebody Else's Mailbox To The Navigation Pane:**

MOUSE



1. On the **FILE** tab click the **ACCOUNT SETTINGS** button in the main window
2. From the menu choose **ACCOUNT SETTINGS**
3. Select the account you are using (exchange account)
4. Click the **CHANGE** button above the **CHANGE ACCOUNT** dialog appears.
5. Click the **MORE SETTINGS** button on the bottom right.
6. The **MICROSOFT EXCHANGE** dialog opens
7. Go to the **ADVANCED** tab.
8. In the **MAILBOXES** section click **ADD**
9. Select a users mailbox you know that the permissions have been set for you from the address book
10. Click **OK** the name should appear in the **MAILBOXES** section
11. Repeat for any other mailboxes you need.



12. Click ok to close the **MICROSOFT EXCHANGE** dialog
13. On the **CHANGE ACCOUNT** dialog click **NEXT** and then click **FINISH**
14. Click **CLOSE** on the **ACCOUNT SETTINGS** dialog
15. The users name and folders you have access to should now appear in your navigation pane. They will continually appear and remain each time you open outlook.

Section 12 Other Tools

Objectives:

BY THE END OF THIS SECTION YOU WILL BE ABLE TO:

- Views
- Out of office assistant
- Rules
- Quicksteps
- Outlook Today
- Archiving
- Mailbox cleanup
- Customising ribbon
- Customising quick access toolbar

Views

Create a new view

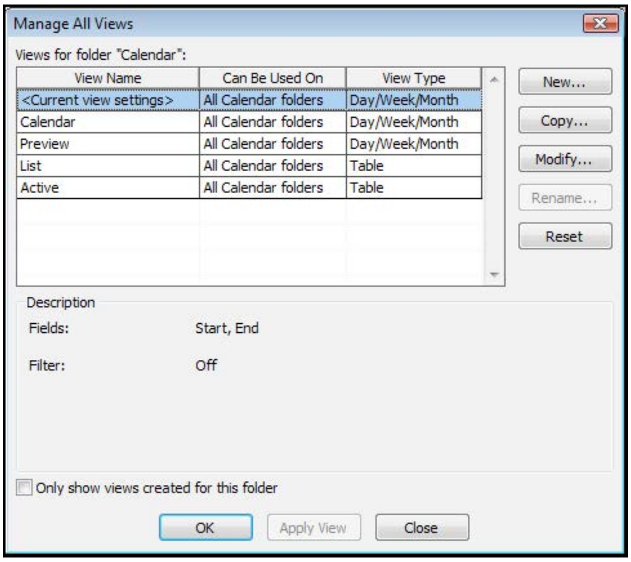
If the user finds that a particular view they require is not available in Outlook they can create their own custom view, e.g. create a view based on a specific category.

Type of view	Description
Table	Items display in a grid of rows and columns. Each row contains one item. Details about items are in columns. To control the level of detail that appears, columns can be added and removed, items can be filtered by criteria specified by the user, or items can be sorted or grouped. A table view type is best to view mail messages, tasks and details about any other item.
Timeline	Items appear as icons arranged in chronological order from left to right on a time scale. A timeline view type is best to view journal entries and any items that the user wants to plot in relation to time.
Day/Week/Month	Items are arranged on the Calendar, similar to a paper day planner. Items can be viewed in blocks of time for one or more days or weeks or for a month. A day/week/month view type is best to view appointments and meetings, and tasks scheduled for work on specific dates.
Card	Items appear as individual cards similar to an address card file. To control the level of detail that appears, fields can be added or removed in an item or items can be filtered by criteria the user specifies. A card view type is best to view contacts and any items the user wants to find quickly in alphabetical order.
Icon	Items and files are represented by individual icons arranged on an invisible grid. An icon view is best to view notes and files as large icons, small icons or in a list of icons.

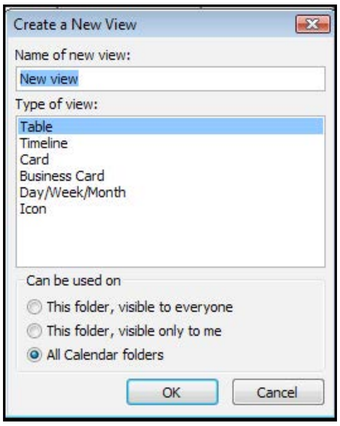
➤ **To Create A Custom View In Calendar:**

MENU

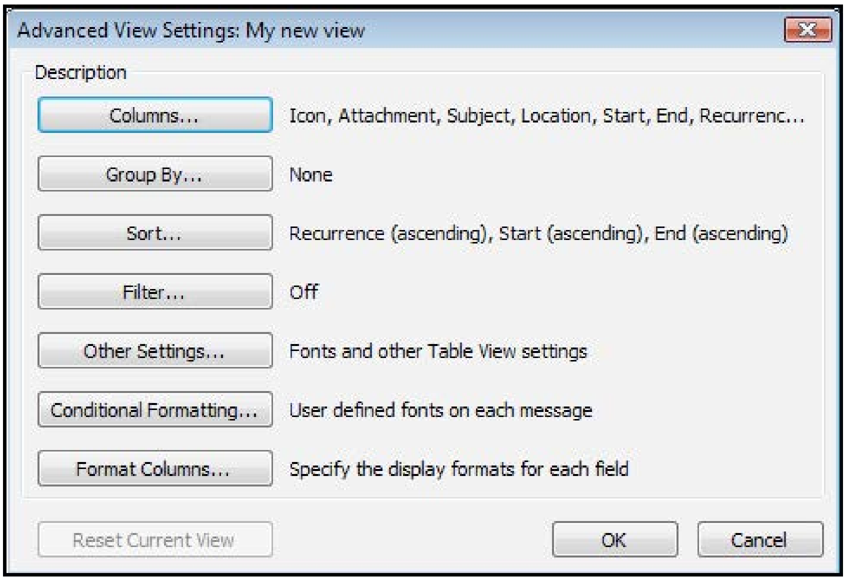
1. Choose **VIEW** ribbon, **CURRENT VIEW** group,**CHANGE VIEW**.
2. From menu select manage viewsa dialog appears.



3. Choose **NEW**. The **CREATE A NEW VIEW** dialog box displays.
4. In the **NAME OF VIEW BOX**, type the name required, e.g. Outlook Project View.
5. To determine the basic structure of the view, in the **TYPE OF VIEW** box, choose the view type required, e.g. Table.



6. A view may be applied to just a specific folder or all folders of the type you are making a view for.
7. You can have the view available for just yourself or everyone. Make a selection.
8. Click **OK**



9. The advanced view settings dialog will appear to allow you to change the defaults for views of this type

10. We have looked at many of the options during the course of this manual.

Button	Description
Fields	Used to change the fields that display in the current view.
Group By	Used to change the groups in the current view.
Sort	Used to change the sort order in the current view.
Filter	Used to select which items display in the current view.
Other settings	Used to format items in the current view.
Conditional Formatting	Automatic formatting based on content of item (next subsection)
Format columns	Allows advanced formatting of column labels

11. Choose the options required, e.g. choose Fields and add fields required.
12. Choose **OK** to close the View settings dialog box.
13. In the **CHANGE VIEW** menu in the **CURRENT VIEW** group your view will be available to apply

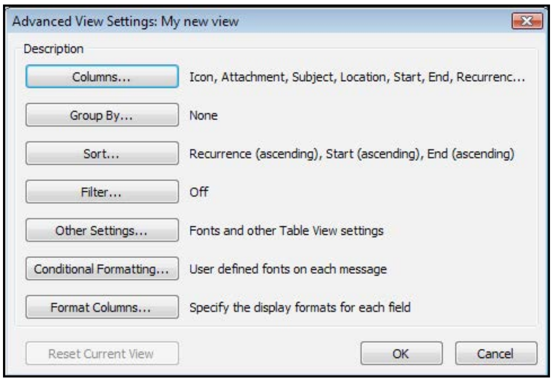
- *The Manage View feature is also available when using other Outlook folders, e.g. Contacts, Tasks, inbox, notes*

Conditional Formatting

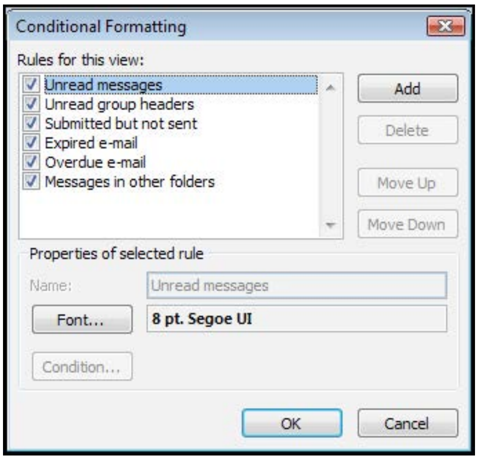
Conditional formatting allows your items to be formatted based on the item content. And can be useful to auto matically format your emails etc based on who they are from based on topic or anything you choose really

➢ **<u>To set automatic formatting</u>**

<u>MOUSE</u>



1. Move to a folder you wish to apply conditional formatting on e.g. inbox
2. On the view menu in the current view group click on view settings to access the advanced view settings dialog.
3. click on the conditional formatting button to access the dialog
4. You will probably find there are some conditional formatting rules already set for the folder that have been set by the installation.

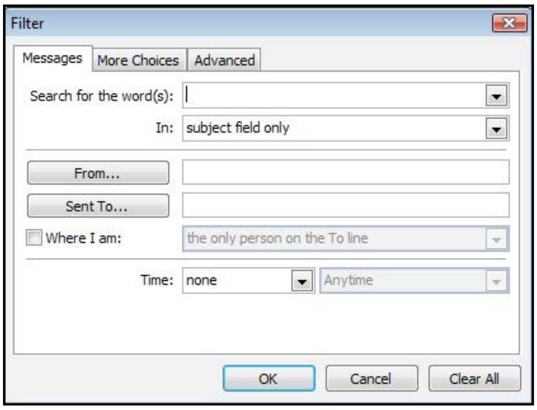


- *Try not to delete or change these as they may be difficult to reset*

5. click on add a new rule will appear called untitled
6. Enter a name for it in the name box aand use the up/down buttons to position its priority
7. Choose a different font style for the item by clicking on the **FONT** button, choose the font, colour underline etc

- *When setting the font style try not to use standard red colouring as this has a significance in outlook concerning overdue emails.*

8. When the font is selected click on the condition button to allow us to set a reason as to when this format is to be used.

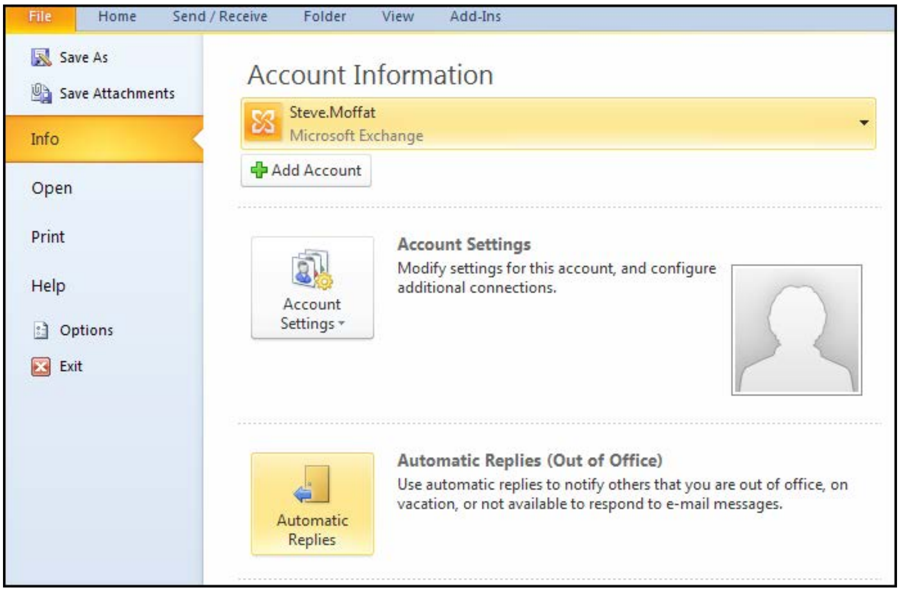


9. From the **FILTER** box set a criteria from one or more of the tabs click **OK**.
10. Click ok to set the conditional format.
11. Click **OK** to apply it to the view

- *At any point you may return to the conditional formatting dialog as previously instructed to either untick or delete the condtional format you have created. Unticking merely disables it*

Out of Office

If you're not going to check e-mail while you're out of the office, use the Out of Office Assistant to manage your Inbox. You can automatically respond to incoming mail. You can also create rules that automatically manage incoming messages by telling Microsoft Outlook what action to take with them. For example, you can create rules to automatically move or copy messages to other folders, to delete messages, to send custom replies, and so on.

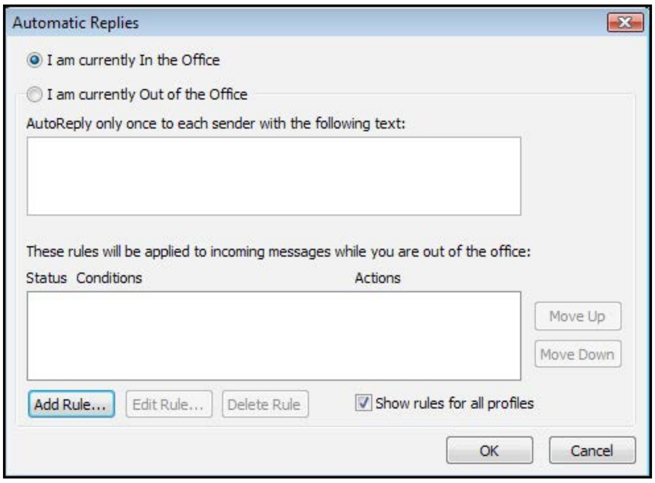


To turn autoreply on

- **Automatically Reply To Incoming Messages While Out Of The Office:**

MOUSE

1. On the **FILE** tab, click **AUTOMATIC REPLIES (OUT OF OFFICE)**.
2. In the dialog that appears. Click I am currently Out of the Office.



3. In the AutoReply text box type the message you want to send to others while you are out. It will be sent only once to each sender per session of out of office being used
4. Repeat the procedure to turn autoreply off

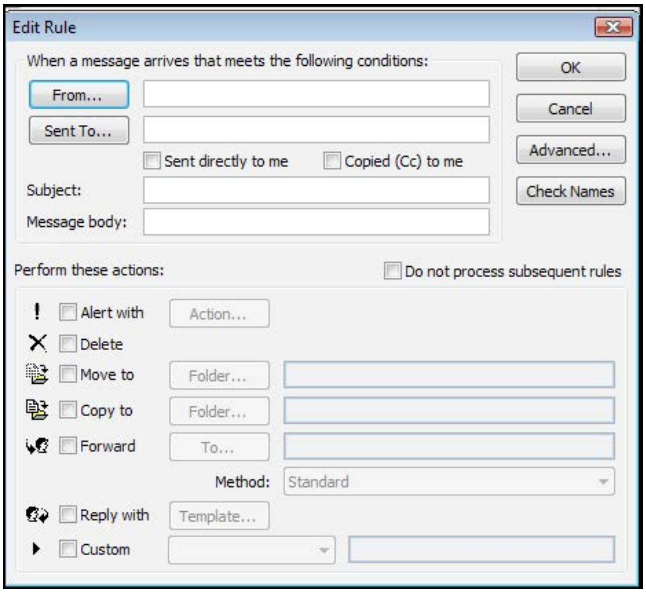
Autoreply rules

If you are away from your mail for an extended time important mail could be missed. Although one method of dealing with this is to share folders as previously mentioned you may want certain emails forwarded to yourself elswhere or to a specific colleague to deal with them. A specific customer may be dealt with by one colleague another customer by a different colleague. Without having to share your mailbox.

- **To Create Rules To Manage Your Mail While Out Of The Office:**

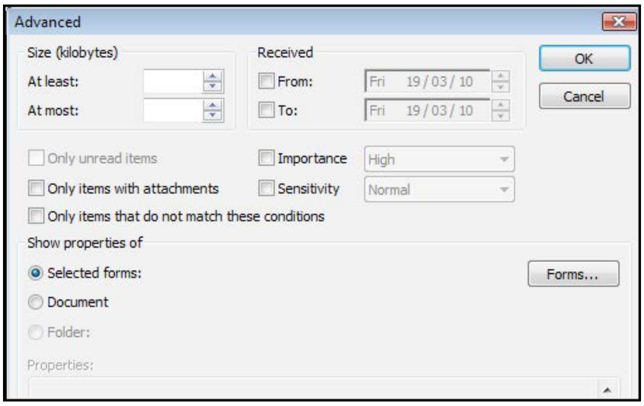
MOUSE

1. On the **FILE** tab, click **AUTOMATIC REPLIES (OUT OF OFFICE)**.



2. Click **ADD RULE**.
3. Under **WHEN A MESSAGE ARRIVES THAT MEETS THE FOLLOWING CONDITIONS**, specify the conditions of the rule that the message must meet for the action to occur.
4. Such as if from a particular person or containing specific text in the subject or message body.
5. To specify more conditions, click **ADVANCED**.

6. Select the options you want, and then click **OK**.
7. To specify that this rule must be the last one applied, select the **DO NOT PROCESS SUBSEQUENT RULES** check box.



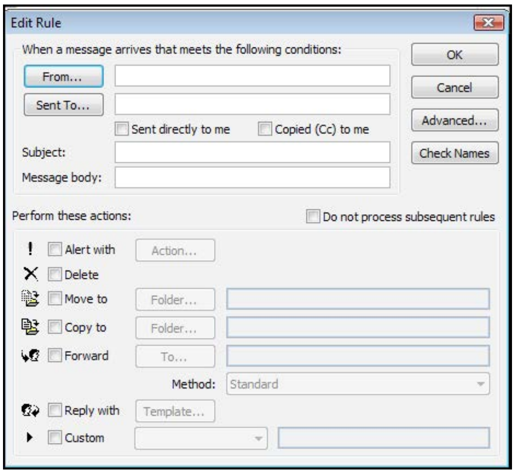
8. Under **PERFORM THESE ACTIONS,** select the options you want. You can select more than one option.
9. You may want a specific reply or to forward the email to someone else.
10. Click **OK** to create the rule
11. The rule should appear in the bottom section of the automatic replies window.
12. You may create as many rules as you wish to cover all eventualities.
13. Reorder the rules as you wish using the move up/move down buttons.
14. In the Status box, select or clear the check box next to the rule you want to turn on or off.

EDITING THE OUT OF OFFICE ASSISTANT RULES:

At different times you may wish to edit some of your rules as circumstances change concerning the people you have contact with and the work you are involved with

➢ **To Edit The Out Of Office Assistant Rules:**

MENU



1. On the **FILE** tab, click **AUTOMATIC REPLIES (OUT OF OFFICE)**.
2. Click Edit Rule to change a specific rule. Make changes to the conditions and actions for the rule.
3. Click the rule you want to move up or down in the list and click Move Up or Move Down to change the order in which rules are applied for Out of Office Assistant.
4. Click **DELETE RULE** to delete the rule you want to delete.

Rules and alerts

Rules and alets are methods you can use to regulate and help you with your mailbox organising your emails, formatting them automatically replying and forwarding even while you are IN the office.

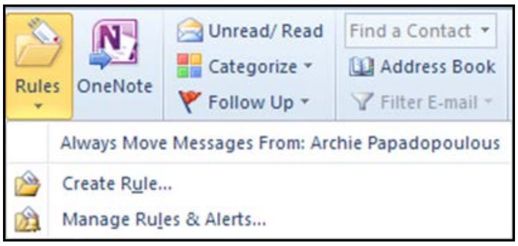
Automatic Creation of Rules (Method 1)

There are a couple of ways of setting up rule in 2010 the quickest and easiest is to use the ribbon to help you organise your mail and create automatic rules based on your selections.

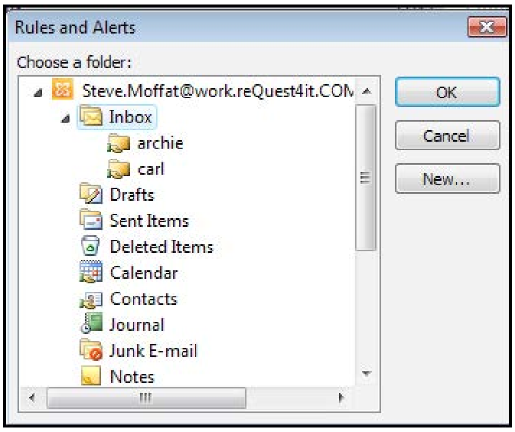
➢ **To autocreate a rule**

MOUSE

1. Ensure you have folders created within your mail folders in the navigation pane to store emails from different individuals.
2. Select an email from someone you would like to create a rule for and move.



3. Click on the **RULES** button in the **MOVE** group on the **HOME** ribbon.
4. From the list select **ALWAYS MOVE MESSAGES FROM <SENDERNAME>** a dialog will open.
5. Select a folder you wish to move the emails to.
6. If there is not a folder you can use click new to create a new folder.
7. When selected click **OK**

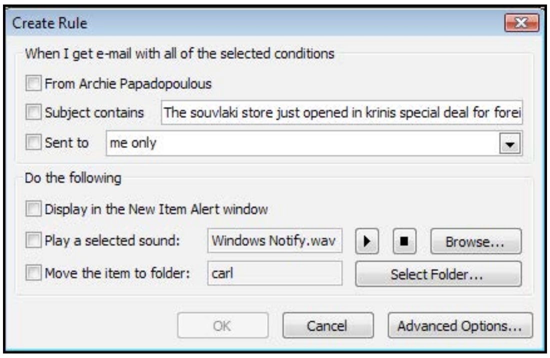


8. All emails in current folder will be moved to the selected folder and any future emails from this person will be moved automatically to the same location keeping you mailbox a little clearer
9. Repeat for other emails a rule is created each time based on your selections.

OR

Method 2

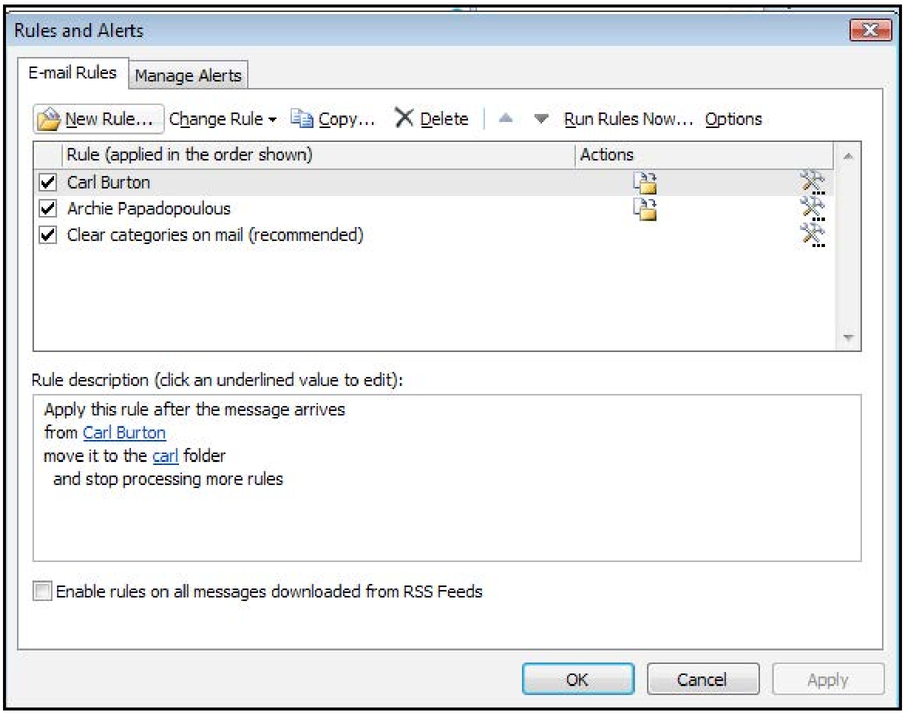
Another way to create a rule if you want to do more than just move it.



1. Select an email from someone you would like to create a rule for.
2. Click on the **RULES** button in the **MOVE** group on the **HOME** ribbon.
3. Click from the menu choices **CREATE RULE**.
4. Tick any box that you feel you want to apply, edit the subject line to look for specific text other than that displayed (keyword)
5. Click **OK** to create and apply rule.

Managing rules

After a while you may wish to remove, disable, or edit a rule that is in conflict with another. To do this we will have to manage our rules. You may wish to create rules from scratch.



- **<u>To manage rules</u>**

<u>MOUSE</u>

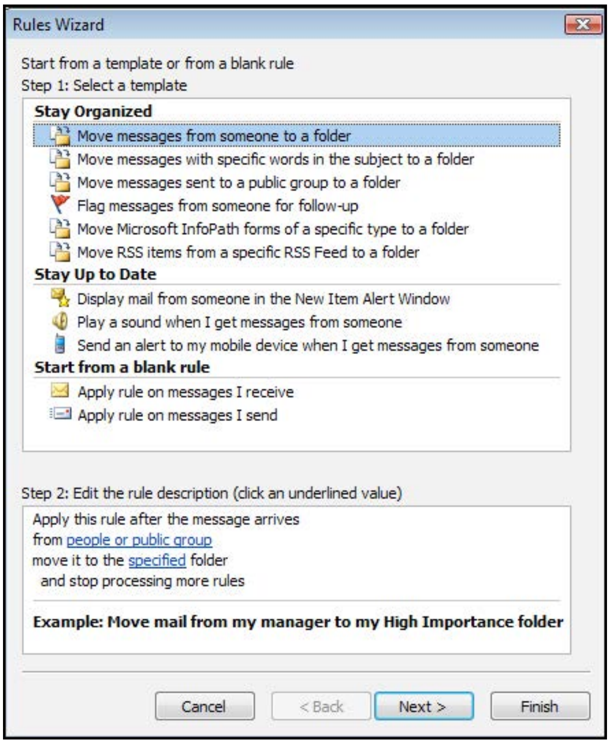
1. Click on the **RULES** button in the **MOVE** group on the **HOME** ribbon.
2. Click on Manage rules.
3. In the main window you see a list of all rules you have created you may now.
- **CREATE A NEW RULE**
- **EDIT AN EXISTING RULE**
- **DISABLE A RULE**
- **DELETE A RULE**
- **RUN EXISTING RULES**
4. When you have completed what you wish click ok to close window

Create a new rule from scratch

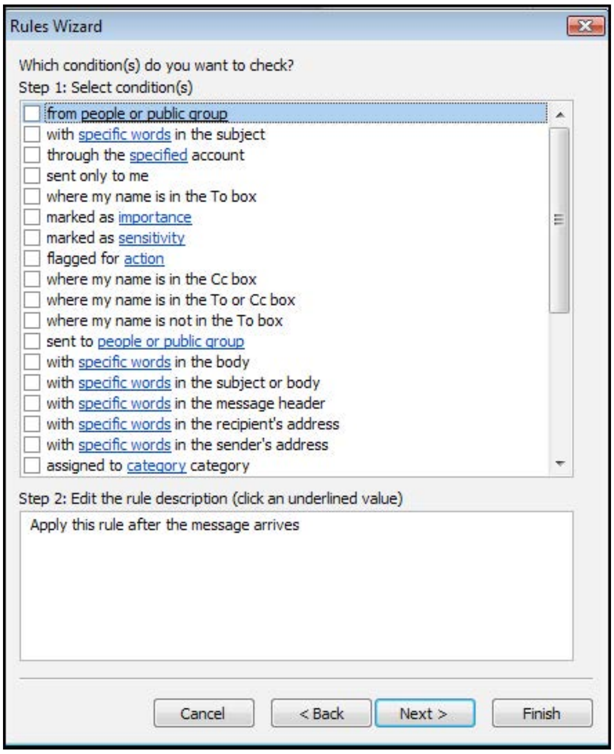
This is the longest way to create a rule but gives the maximum options for checking the email as it comes and options of what to do with it.

➢ To create a rule from scratch

MOUSE



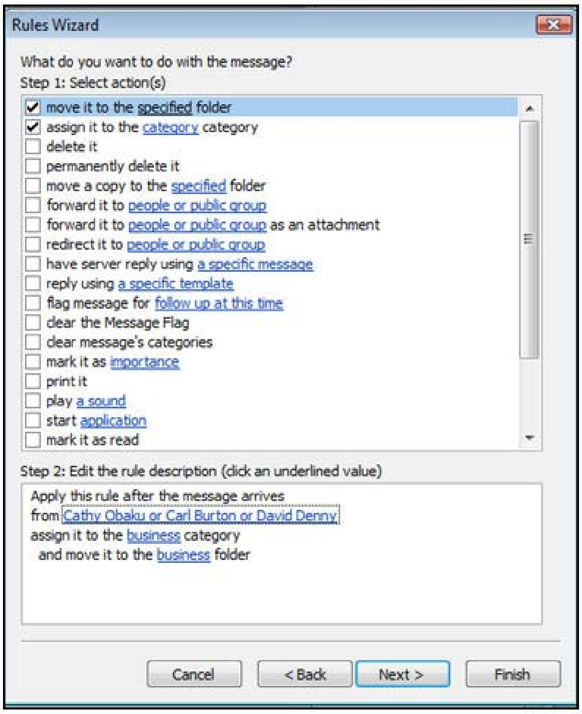
1. Open the rules and alerts window (previous)
2. Click on new Rule the rules wizard starts

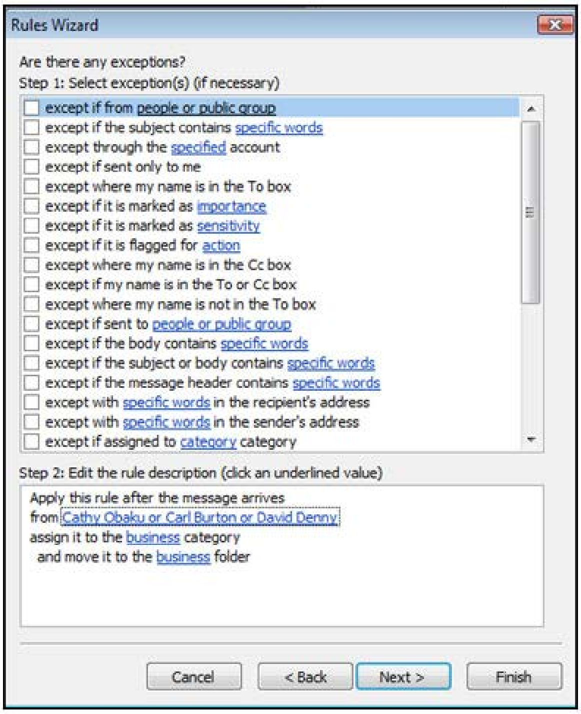


3. For the most options click in start from a blank rule and select apply rule on messages I receive. Click next

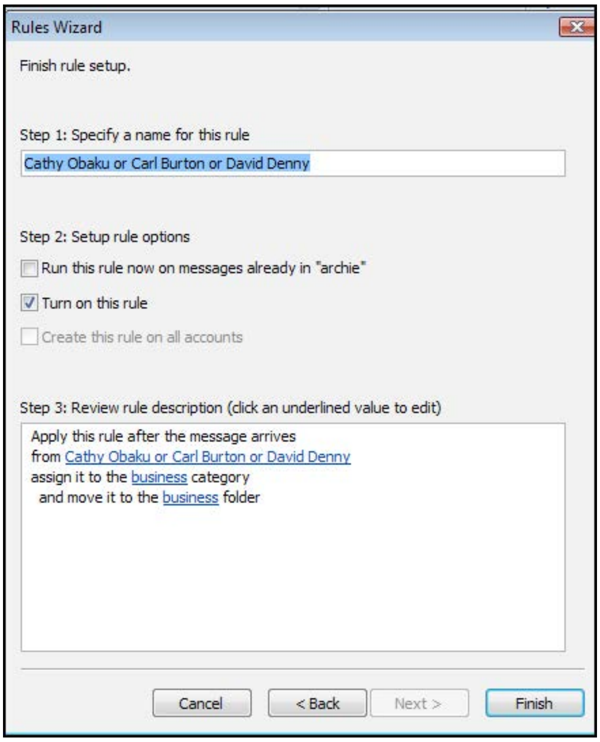
4. Tick any boxes that you wish to check for. In the bottom box where there is a blue hyperlink clicking will open a dialog with various options for what conditions to add.

E.G. Clicking "specific words" allows you to enter the words to check for, clicking from "People or public group" will open the address book to add usernames





5. Click next, In this step you make choices as to what to do with the messages that meet the criteria you set previously
6. Click next,select any exceptions to the rule that may arise, click next when done.
7. In the next window give a name for the rule, a rule name is automatically generated by outlook but you may wish to change it
8. Click finish to create the rule and to see it in your rules list



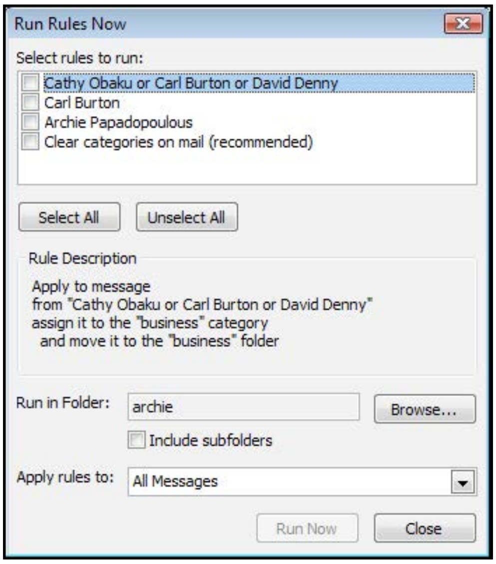
9. Use the move up move down arrows to reorder the rules as you wish.
10. Rules that are ticked are enabled and will be running in the background.
11. To disable a rule just untick the rule.

Run Rules

Normally the rules will run in the background as mail arrives into your inbox but if you have set up a number of rules using the method just mentioned you may need to run them on existing mail in your inbox

➢ **To run rules manually**

MOUSE



1. Open the **RULES AND ALERTS** window (previous)
2. Click on the **RUN RULES NOW** button

3. Select the rules you wish to run by ticking the boxes by the side of them or clcking the **SELECT ALL** button.
4. Select the folder to run them on if the folder shown in **RUN IN FOLDER** box is incorrect then click on the **BROWSE** button
5. Select folder to run the rules on (likely inbox) click **OK** to display in **RUN IN FOLDER** box
6. Tick the **INCLUDE SUBFOLDERS** (if it has any to ensure that ALL email is checked for organising)
7. If you only want the rule to apply to only a certain subset of messages – e.g. unread messages then select the subset from the drop down box **APPLY RULES TO**.
8. When all options have been set as you would like then click on the **RUN NOW** button.
9. The rules will run click on the **CLOSE** button to close the run rules now window.
10. Click on **OK** to close the manage rules window

Quicksteps

Quicksteps is a new feature to 2010 to enable you to do regular things more easily within your mail folders. We will look at how to use them and create your own quicksteps to make your use of Outlook quicker and easier. Quicksteps are like small macros (stored procedures) and only need a click to activate that procedure.

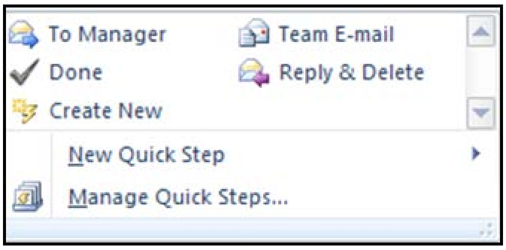
Using Quick Steps

A number of quick steps have already been built into outlook some you may use staright away some you will have to edit.

➢ **<u>To use a quickstep</u>**

<u>MOUSE</u>

1. On the **HOME** ribbon in the **QUICK STEPS** group click on the down arrow to the right of the box to display all quick steps.
2. Click on a quickstep to run task.



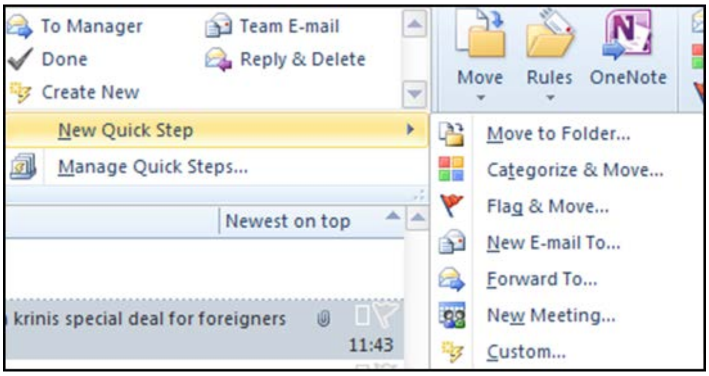
To create a quick step

Creating a quickstep needs you to think of time consuming things that you wish done easily

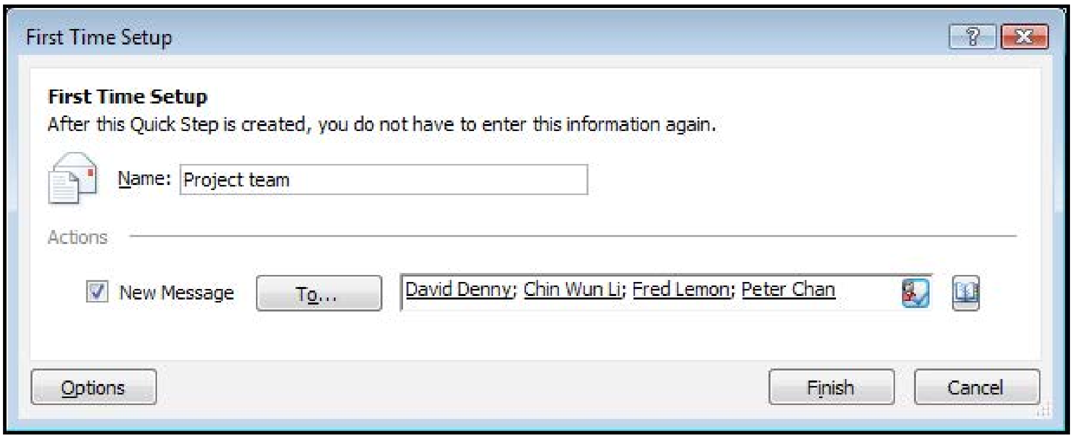
➤ **To create a quick step**

MOUSE

1. On the **HOME** ribbon in the **QUICK STEPS** group click on the down arrow to the right of the box to display all quick steps and further options



2. Click on **CREATE NEW QUICK** step
3. From the side bar that opens up decide what you would care to do (we will create a new email to someone (or group)
4. Select **NEW EMAIL TO…** a dialog opens
5. Enter a name for the Quick step
6. In the **TO** box use the to button to select names from the address books



OR

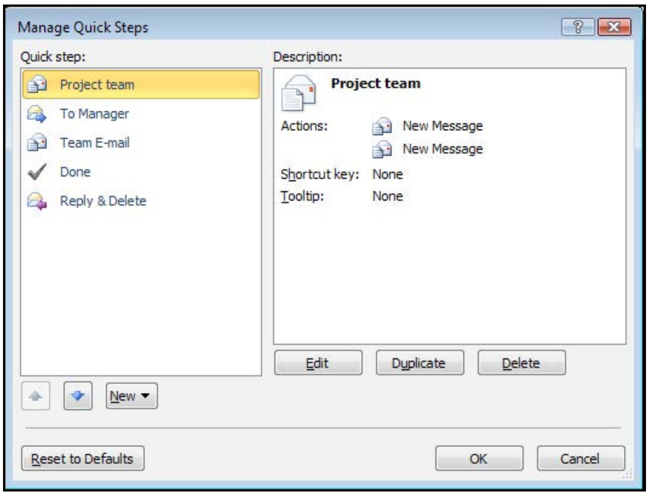
7. Type the names you wish to email to and click on the **VERIFY** button on the right of the **TO** box.
8. Click **FINISH** to create the Quick Step
9. The Quick Step will appear in the Quick Step menu
10. Click on it to run.

Manage Quick Steps

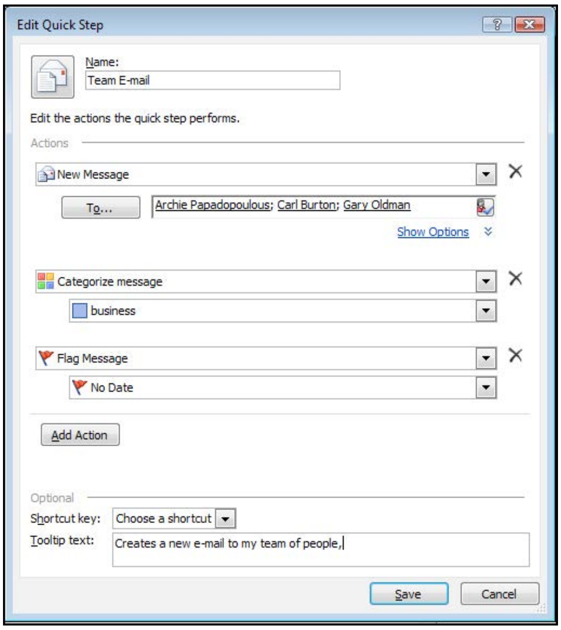
When you have several Quick Steps created you may need to edit one or set further options

➤ **To manage quick steps**

MOUSE



1. On the **HOME** ribbon in the **QUICK STEPS** group click on the down arrow to the right of the box to display all quick steps and further options
2. Click on **MANAGE QUICK STEPS** the manage Quick Steps dialog will open
3. From here we can see the Quick Steps on the left which we can re-order using the **UP/DOWN** arrows below.(the most used would be better at the top)
4. On the right we see the details of any Quick Step we have created and below the option to delete any selected Quick Step.
5. Select **TEAM EMAIL** and click the **EDIT** button.



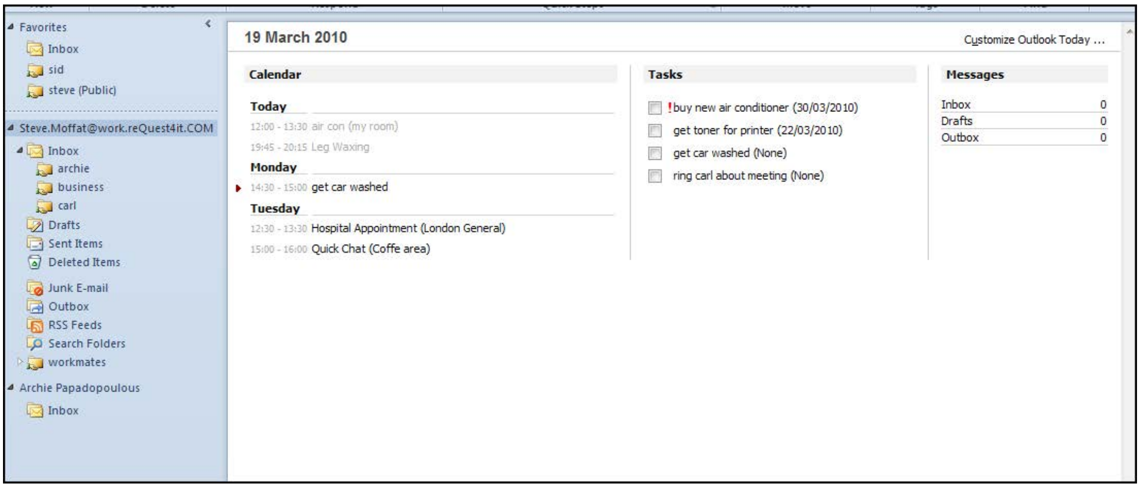
6. Select your team from the address book.
7. Select the action (Quick Steps can do more than create messages)
8. Click the **ADD ACTION** button a bar appears.
9. From the bar select an action (categorise message) Select a category

10. Click on the cross beside it to remove an action
11. Select any other actions you wish
12. At the bottom add some tooltip text if you wish or choose a shortcut key.
13. Click on **SAVE** to save the changes to your edit.

- *Quick Steps can do most of the actions you would normally do in your mail folders quickly and easily, experiment with the different options for making regular tasks in your email folder quicker and easier.*

Outlook today

Outlook today has been around for awhile and is useful for viewing all aspects of your mailbox (mail,calendar,tasks all in one window it is slightly less useful now since we have the to do bar but it still is a good one glance reference of the state of your day or week



- **<u>To open outlook today</u>**

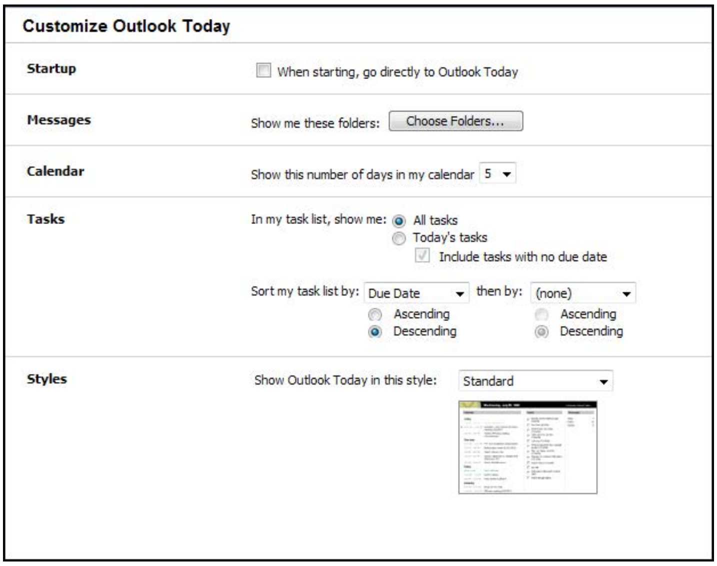
<u>MOUSE</u>

1. Click once on your named mailbox in the navigation pane
2. Outlook today appears showing current tasks, the weeks appointments and lists your mail folders showing how many unread mail you have in each folder.
3. All items you see are hyperlinks and clicking on an item will either open the item or take you to the containing folder.

Customise Outlook Today

➤ **To customise outlook today**

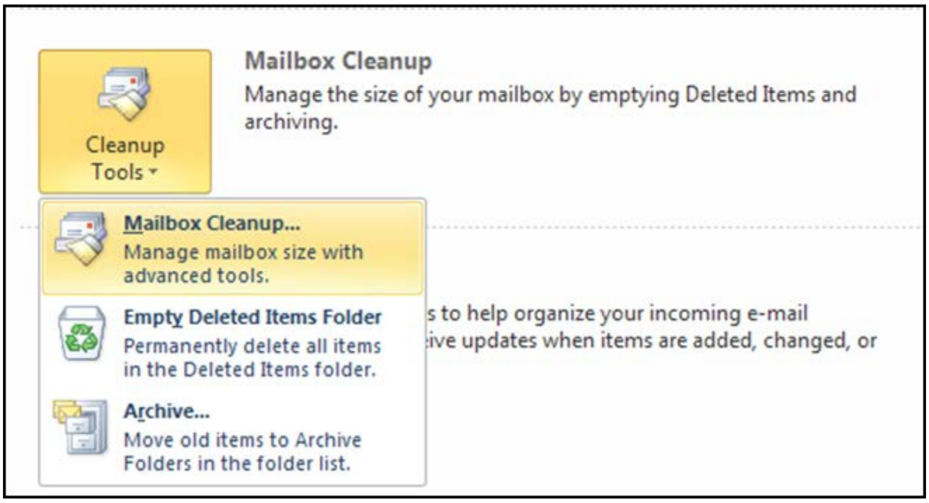
MOUSE



1. In the outlook today window click on the **CUSTOMISE OUTLOOK TODAY** button.
2. Make selections from the available choices
3. When selecting folders they will appear in the list in the order selected.
4. When all options have been set click save changes to save and go back to outlook today

Mailbox Cleanup

Mailbox cleanup is a collection of tools to reduce the size of your mailbox keeping it running smoothly. Remember that your mailbox on the exchange server is of a limited size sometimes quite small (dependent on your organisations mail policy) so this is a useful tool to help you with the maintenance of your email.

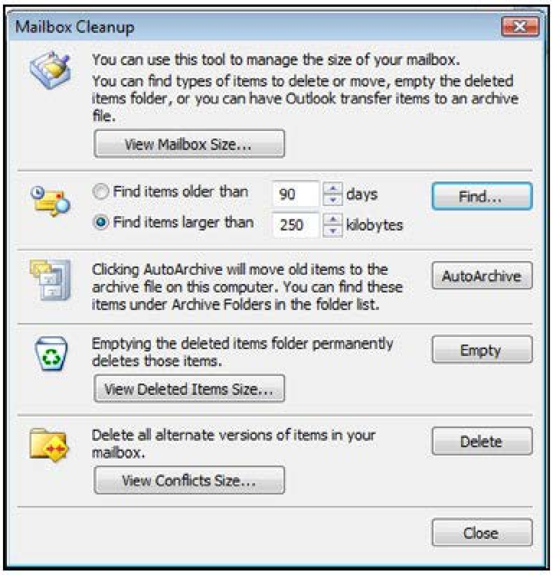

Cleanup Tools
Mailbox Cleanup
Manage the size of your mailbox by emptying Deleted Items and archiving.
Mailbox Cleanup...
Manage mailbox size with advanced tools.
Empty Deleted Items Folder
Permanently delete all items in the Deleted Items folder.
Archive...
Move old items to Archive Folders in the folder list.
s to help organize your incoming e-mail
ive updates when items are added, changed, or

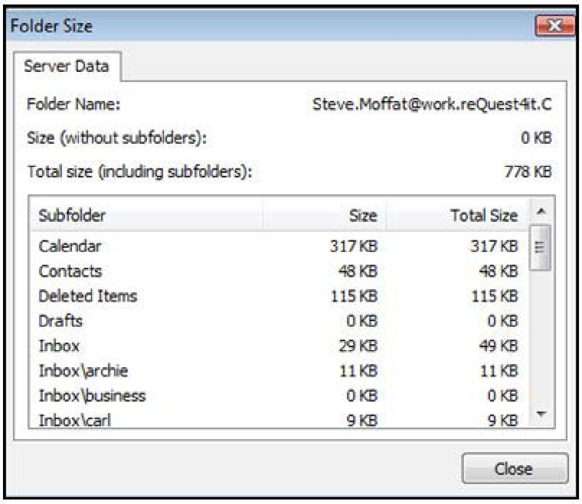
Cleanup Tools

➢ **To run mailbox cleanup**

MOUSE

1. Go to the **FILE** ribbon and click on the **CLEANUP TOOLS** in the mailbox cleanup section.
2. Click the **MAILBOX CLEANUP** option a dialog opens





3. Check your mailbox size by using the mailbox size button.this will tell you if you need to do any further maintenance.
4. The find feature allows you to locate old emails or lagrge emails that are padding out your mailbox giving you the option to remove them
5. The autoarchive features moves old things from your mailbox to a local folder on your computer. (see archiving next section)
6. You have the option to empty the deleted items folder in your mailbox the most common cause of overfilled mailboxes try this solution first. Check the folder size with the button provided.
7. View conflicts shows duplicated emails that have downloaded more than once for whatever reason or accidentally been duplicated (using ctrl key when selecting) these can be cleaned up. Use the view conflicts size to check how big these conflicts are.

- *If all of these tools (bar autoarchive) have not significantly reduced your mailbox size then we have to look at archiving*

Archiving

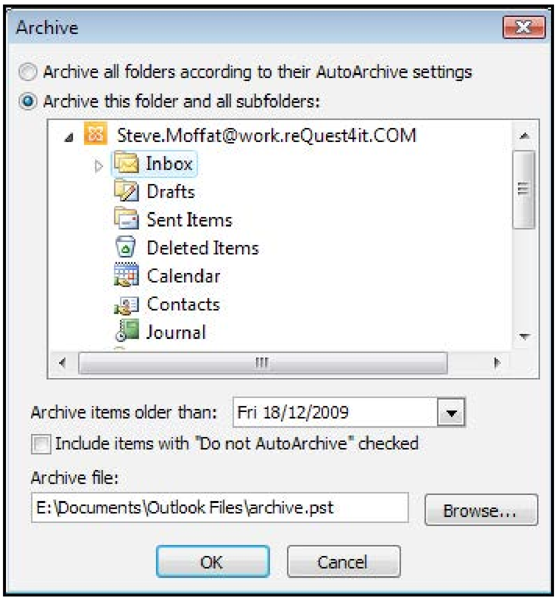
Archiving is a method of transferring the old emails from your mailbox (exchange server) to a data file (PST file) on your local computer (or a network location) to free up much needed space the emails do not need to be deleted they are stored to be accessible again if needed in the future through outlook.

The default location is hard to access in the normal way ofthings so it is good to note the location of where these archives are made. Creating a data file beforehand (next section) is a good method of directing them to an easily identifyable place whether locally on on a network location you have easy access to.

Manually archiving is the preferable option as you have the ability to set the parameters of the archive beforehand.

➢ **<u>To archive your mailbox</u>**

<u>MOUSE</u>

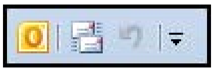


1. Go to the **FILE** ribbon and click on the **CLEANUP TOOLS** in the mailbox cleanup section.
2. Select the **ARCHIVE** option a dialog appears.
3. Select the **ARCHIVE THIS FOLDER AND ALL SUBFOLDERS** option
4. Select your named mailbox
5. Select a date to archive emails that are older.
6. If you desire select the checkbox to ensure everything is archived.
7. Choose a location and an archive file name (ending in .PST)
8. Click **OK** to archive.

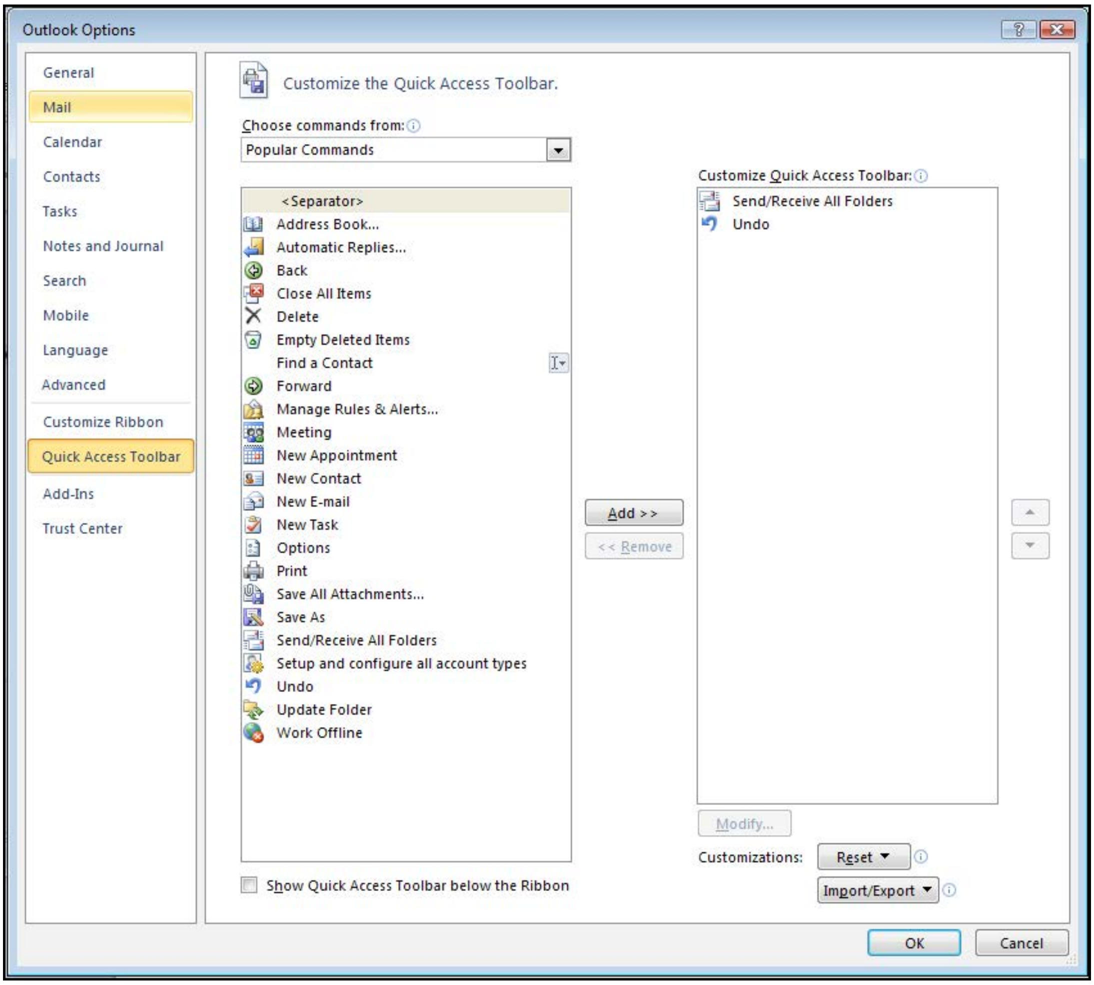
- *The archive will recreate any folder structure you have created within your mail folders and put the emails in the same place in the data file.*
- *The archive will run in the background allowing you to continue using outlook.*
- *To access and open PST files see next section*

Customising Commands

Customise Quick Access Toolbar



This is the location where you are able to customise the quick access toolbar (above the **FILE RIBBON**) and add your most often used buttons to it.



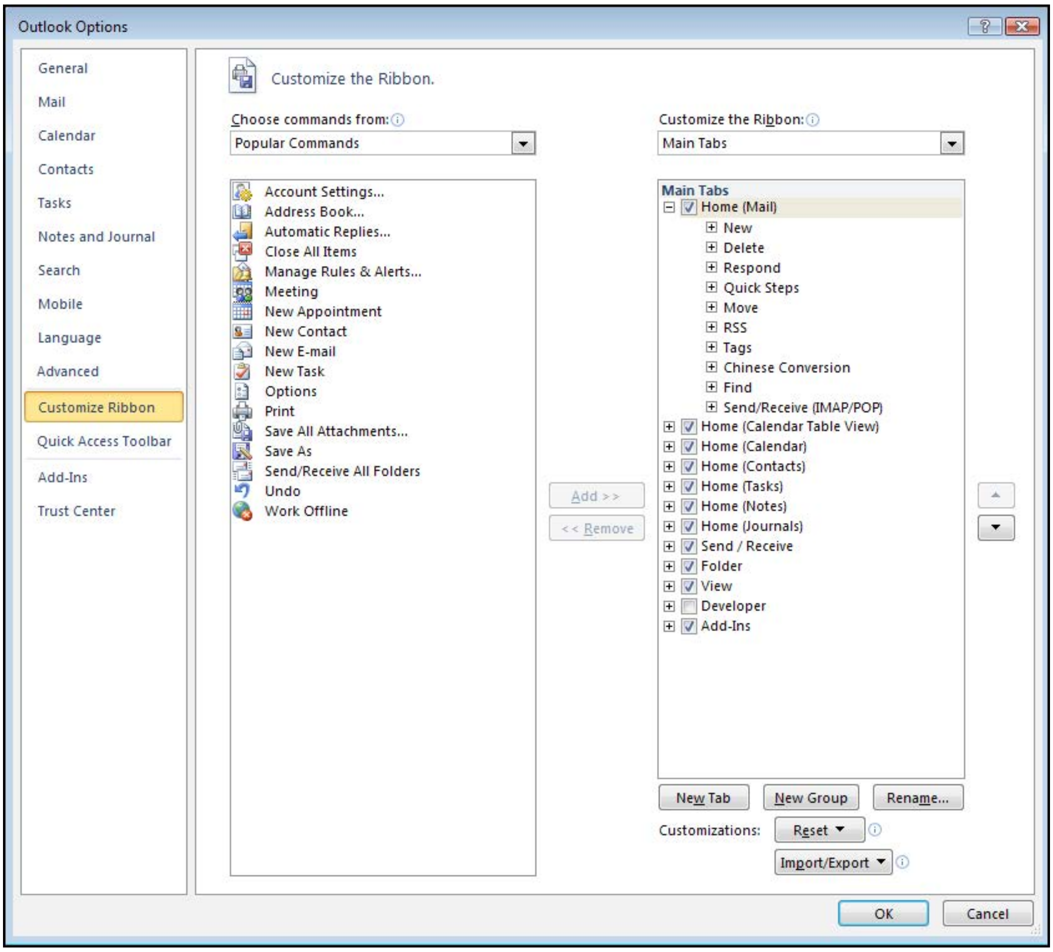
➤ **To customise quick access toolbar**

MOUSE

1. Open up the **OPTIONS** dialog from the **FILE** ribbon
2. Go to the **QUICK ACCESS TOOLBAR** button on the left
3. From the drop down arrow on the top left of the box you may choose which group of commands you may wish to see.
4. Select the buttons on the left and click on the add button in the middle to move them to the toolbar.
5. If you make a mistake then select the button on the right and click **REMOVE**.
6. Once all the buttons you want are on the right hand side click **OK** to finalise your choices and apply them.
7. You may click on **RESET** at any time to return to the default quick access toolbar

Customise Outlook Ribbons

New to 2010 is the ability to customise existing ribbons and create new ribbons with all the most useful tools for the way you work with Outlook. These customisations can be exported and imported into other computers using Outlook 2010 or simply store the exports in case your machine has to reinstalled. Then simply import your customisations into the new installation.



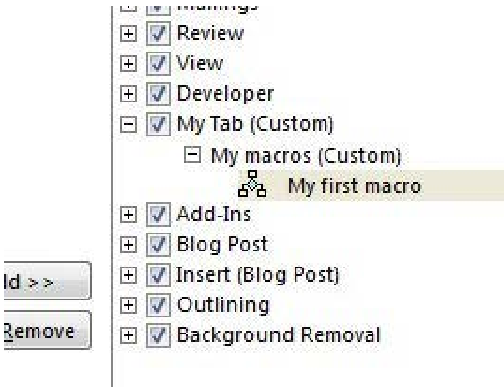
➢ **<u>To create a new ribbon</u>**

<u>MOUSE</u>

1. Go to the **FILE** ribbon and open the **OPTIONS** from the button on the below left.
2. Go to the **CUSTOMISE RIBBON** button the dialog box above will be seen.
3. Click on the **NEW TAB** button a new tab will appear in the right hand frame
4. Use the arrow buttons on the far right to position the tab where you wish it to appear.
5. Click on **RENAME**. Give your tab a name and press **OK**.

1. Select the **CUSTOM GROUP** on your created tab
2. Click **RENAME**Select an icon and name the group then click on **OK**
3. You may add several groups onto your tab if you wish, just rename each of them with appropriate labels.
4. Now you may drag the buttons you wish from the box on the left onto your group on the right.

5. If you cannot find a button you wish, go to the drop down box at the top of the commands and select the **ALL TABS** option for example or **COMMANDS NOT IN THE RIBBONS**. You will now have other buttons you may wish to use



6. When all the buttons have been added that you wish You will end up with your own ribbon on the right with the commands you would most like to access easily.
7. When you click ok you will find your ribbon amongst the others selecting it you will be able to use the commands you have added.
8. You may use the same method to edit existing ribbons

- **<u>To show or hide a ribbon</u>**

<u>MOUSE</u>

1. Access the options from the file ribbon
2. Go to the customise ribbon button
3. Tick or untick the tabs in the right hand box to show or hide ribbons from use.

Social connector feature

The social connector feature is tied in closely with your contacts and emails and allows the sharing of personal contact information with sites such as MYSPACE and WINDOWS LIVE and FACEBOOKand tracking of the status who you share conections with on those sites (saves you logging in to connect to them on te internet) although some are not active yet check on the microsoft site as they are added at different points. If your contacts are part of these sites then their information is shown within the information window and activity,also connection to any instant messenger program (messenger, skype etc) for chats and such.

You must download and install an Outlook Social Connector add-in for each Internet social network that you want to use. These add-ins are not provided by Microsoft —visit the social network sites that you use to find out if they support the Outlook Social Connector.

Activating Social Connector

Social Connector initially uses the information stored in your contacts folder so if you have photos telephone number email address information it makes it easier when you are connected to tie these contacts in with sites.

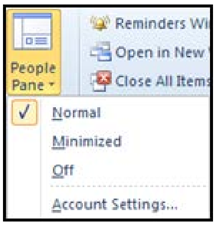
➢ **To activate social connector**

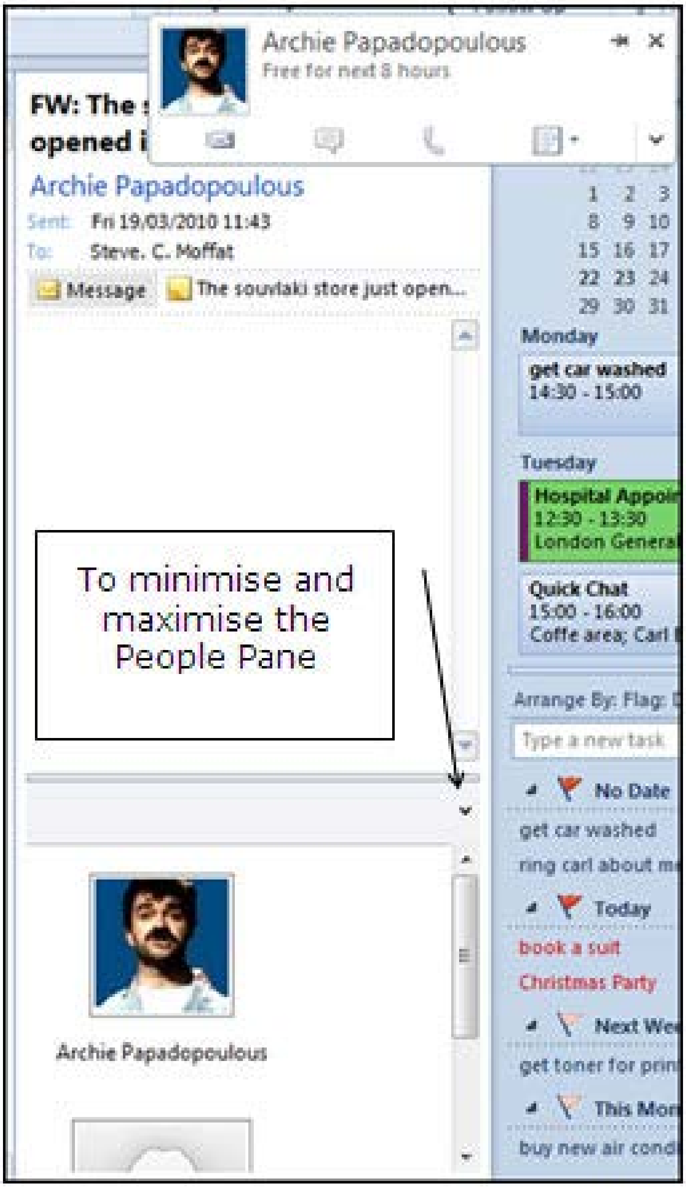
MOUSE

1. Select an email
2. In the reading pane at the bottom right use the small arrow (indicated) to minimise and maximise the people pane

OR

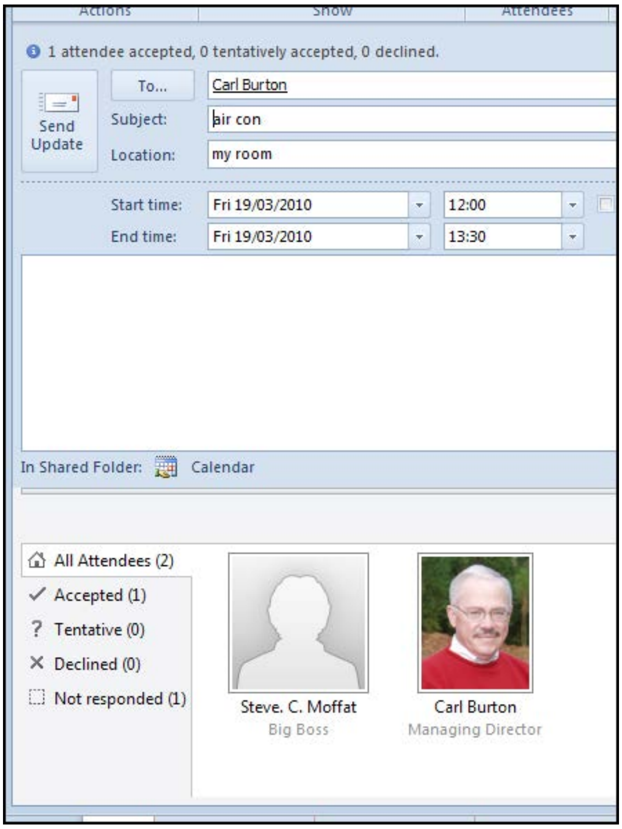
3. Go to the **VIEW** ribbon, **PEOPLE PANE** group and click on the **PEOPLE PANE** button
4. Select **NORMAL**.
5. In the people pane you will see the contacts you may have a connection to on a site.
6. Positioning your cursor over the email address gives you options to:





- **SEND EMAILS**
- **START A CHAT**
- **MAKE A PHONE CALL**
- **PLUS OTHERS DEPENDENT ON YOUR ACCOUNT SETUP**
- *For the best use of this connector and the most options a POP email account should be used or offline folders. A data store that has to synchronised will show updates and and status changes in the people pane.*

7. The people pane is used throughout outlook and can be accessed in calendar appointments, and will appear in the bottom of an open contact.
8. See the people pane in the following open meeting to see some of the advantages of using the people pane.

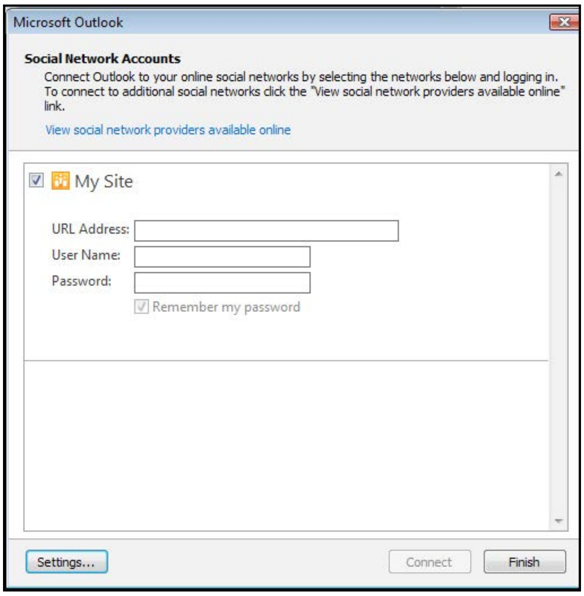

Actions
Show
Attendees
1 attendee accepted, 0 tentatively accepted, 0 declined.
Send Update
To...
Carl Burton
Subject:
air con
Location:
my room
Start time:
Fri 19/03/2010
12:00
End time:
Fri 19/03/2010
13:30
In Shared Folder:
Calendar
All Attendees (2)
Accepted (1)
Tentative (0)
Declined (0)
Not responded (1)
Steve. C. Moffat
Big Boss
Carl Burton
Managing Director

To connect to a site

To connect to a site then you must use the addin for the site that you wish to connect to. Although there are few connectors for 2010 as yet the process will be the same

➢ **To connect to a site**

MOUSE



1. Go to the **VIEW** ribbon, **PEOPLE PANE** group and click on the **PEOPLE PANE** button.
2. Select from the menu, account settings.
3. Select the site you wish to connect to.
4. Enter the web address
5. Enter the password
6. If on an unsecure public machine it would be best not tohave your password remebered
7. Click **CONNECT** then **FINISH**.

Section 13 Work Offline

Objectives:

BY THE END OF THIS SECTION YOU WILL BE ABLE TO:

- Create and access data files
- Set Up Offline Folders
- Synchronise The Folders

Work Offline Using Exchange Server

Working offline gives you access to your information regardless of whether you are connected to your e-mail server. For example, laptop users can work with their e-mail, even when not connected to the e-mail server. Offline folders work slightly differently in 2010 to earlier versions

Work With offline folders

With offline folders it is possible to take a folder from a server location, work with the contents of the folder when you are not connected to the network, and then update the folder and its corresponding server folder to make the contents of both identical. This process is called synchronizing folders.

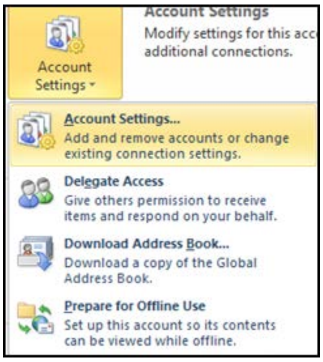
You can add, delete, and modify the contents of an offline folder exactly as you can with a folder on a server. For example, you can change and move items in your offline Inbox, send messages that are placed in your offline Outbox, and read your offline public folders. Meanwhile, you will receive new messages in your Inbox on the server, and other users might add, delete, and change items in public folders. But you will not be aware of these changes on the server until you synchronize.

Offline folders are stored in the Offline Folder (.ost) file. This file is located on your computer hard disk and is available even when the network is down. The .ost file can be compacted to save space on your computer.

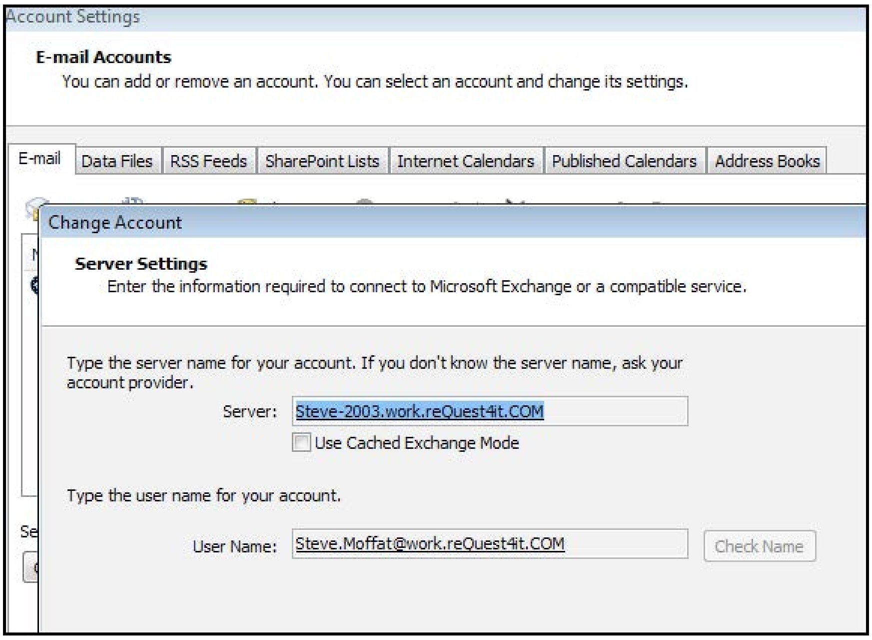
The way in which you set up to work offline the first time depends on the type of e-mail server that you use.

➢ **To Set Up Offline Folders:**

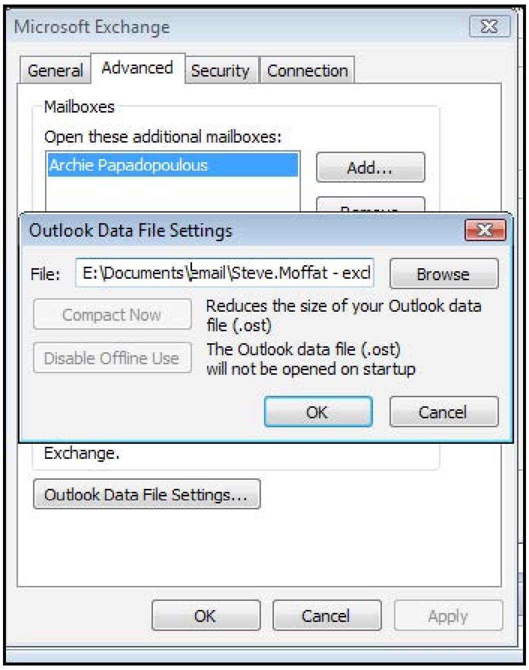
MOUSE

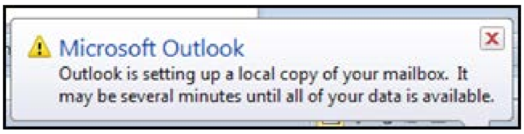


1. On the **FILE** tab, got to the **INFO** section and click**ACCOUNTSETTINGS**, from the menu click account settings again.
2. Select your exchange email account from the list, and then click **CHANGE**.
3. Select the check box **USE CACHED EXCHANGED MODE**.



4. Click on the **MORE SETTINGS** button.





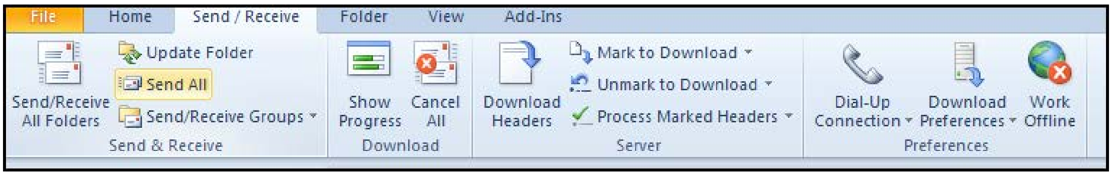
5. Go to the **ADVANCED** tab and click on the **OUTLOOK DATA FILE SETTINGS** button
6. The default file name is <username> exchange.ost. browse to a more useful folder if you wish to.

- *If you change the default location You will probably be asked whether you wish to create the file since it cannot be found*
- *In the future you may come to the same location to comapct your offline folders or disable them.*

7. Click **OK**, Click **OK** again
8. Click **NEXT** and then **FINISH** (you will be warned to restart outlook)
9. Click **CLOSE** to close the account settings window
10. On re-opening outlook you may well be warned that a flocal copy of your folders are being set up and may take a while.
11. Work as you normally do. Sent items remain in your Outbox. Until you sychronise

Synchronising Folders.

You can automatically synchronise your offline folders at a time or time intervals that you specify, or you can manually synchronise them whenever you need to. Whether you synchronise automatically or manually, you must first have specified the folders for offline use.



➢ **<u>To Synchronise.</u>**

<u>MENU</u>

1. On the **SEND/RECEIVE** tab click **SEND AND RECEIVE ALL FOLDERS**.

<u>OR</u>

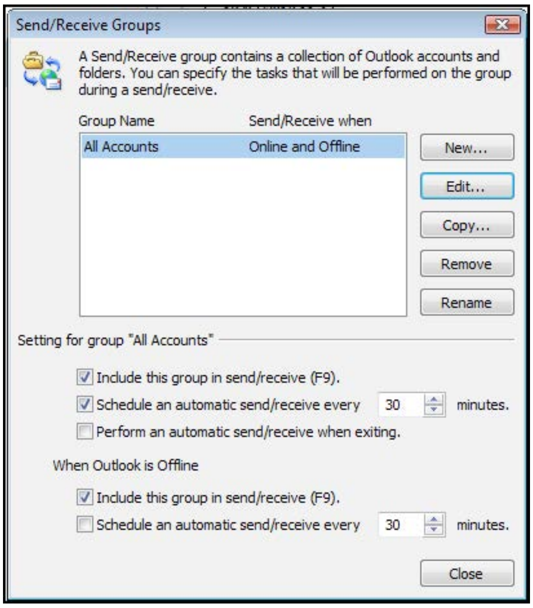
2. Press the **F9** key

Synchronise Folders Automatically/Not

➢ **To Set Up automatic Synchronisation:**

MENU

1. Go to the **SEND/RECEIVE** tab,**SEND/RECEIVE GROUPS,**button and then click **DEFINE SEND/RECEIVE GROUPS**.



2. In the list, select a group name.
3. Under **SETTING FOR GROUP**, select the check boxes that you want
4. Using the **INCLUDE THIS GROUP IN F9** means that **F9** works to send receive when online
5. To automatically synchronise all folders at specified intervals while you're online, select the **SCHEDULE AN AUTOMATIC SEND/RECEIVE EVERY [X] MINUTES** check box, and then enter a number between 1 and 1440.
6. To synchronise all folders after every online Microsoft Outlook session, select the Perform an **AUTOMATIC SEND/RECEIVE WHEN EXITING CHECK BOX.**
7. Under When **OUTLOOK IS OFFLINE**, select the check boxes that you want:
8. To automatically synchronise all folders at specified intervals while you're online, select the **SCHEDULE AN AUTOMATIC SEND/RECEIVE EVERY [X] MINUTES** check box, and then enter a number between 1 and 1440.
9. If you are using a POP3, IMAP, or HTTP e-mail server, you may switch between working online and offline at any time by clicking Work Offline on the **SEND/RECEIVE** ribbon.

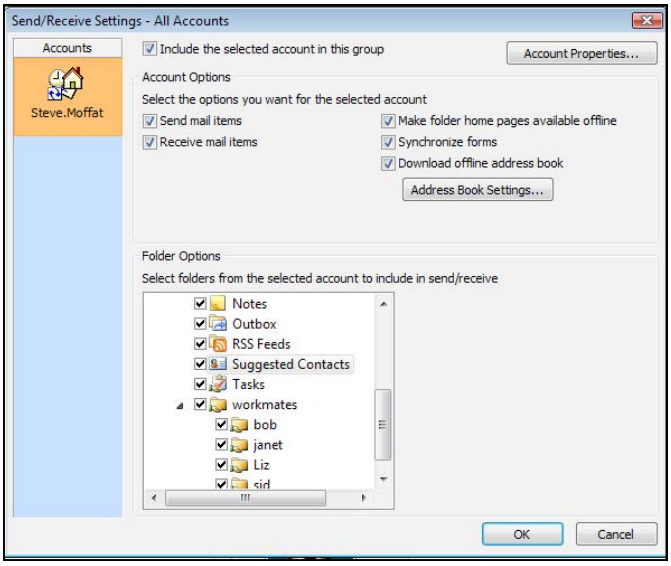
Defining folders to synchronise

Not all folders are synchronised when using offline folders by default this can be annoying especially if you have rules set up redirecting mail but it is easy to rectify.

➢ **Defining which folders to synchronise**

MOUSE

1. Go to the **SEND/RECEIVE** tab,**SEND/RECEIVE GROUPS,** button and then click **DEFINE SEND/ RECEIVE GROUPS**.



2. In the list, select a group name. select from the right the **EDIT** button
3. Tick the box **INCLUDE THE SELECTED ACCOUNT IN THIS GROUP**
4. All items become enabled for selection
5. Select which folders you want to be synchronised with the server.
6. Click ok to close and apply

Data files (PST)

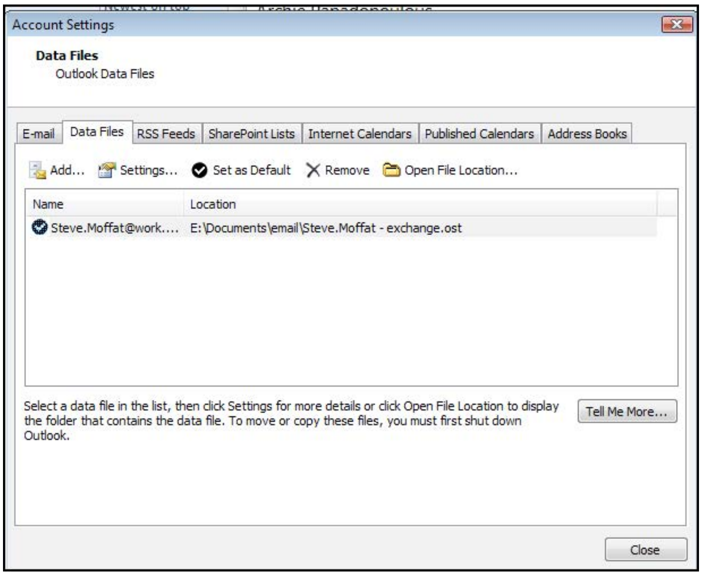
Data files PST files are similar in a way to OST files in that they store items locally but they are not for synchronisation like OST files and are used more for storage and downloading mail into from internet accounts.

Storing items in a PST file means that items are completely outside the exchange environment offline folders are merely a mirror for the server information PST files are not once items are there they are your responsibilty and has nothing to do with exchange.

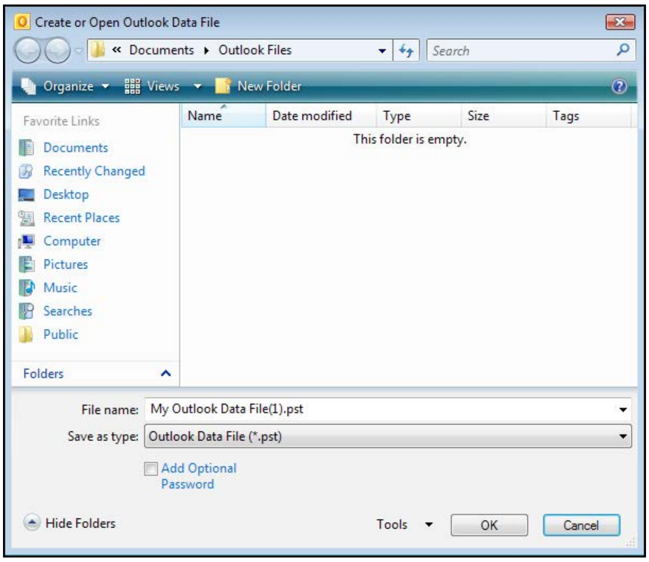
➢ **To create a data file**

MOUSE

1. On the **FILE** tab, got to the **INFO** section and click**ACCOUNT SETTINGS**,
2. From the menu click **ACCOUNT SETTINGS** again.
3. Go to the data files tab

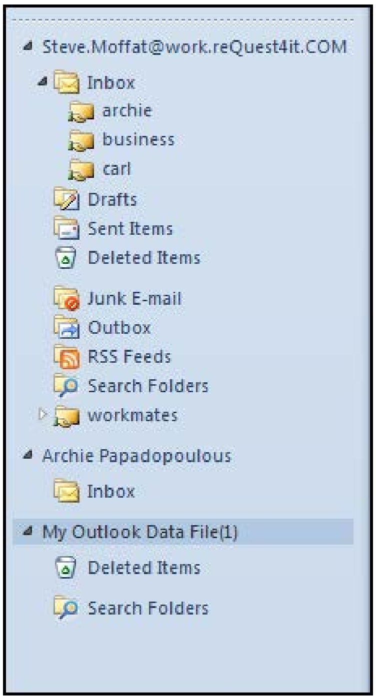


4. This is the location to manage your data files



5. Click on **ADD** to create or access a PST File

6. Browse to a location



7. Enter a filename (the PST part will be added automatically)
8. Click **OK** to create
9. The data file will appear in the list with any other data files (PST or OST)
10. Create others if you need to (like an archive file previous)
11. Use this dialog to add already created data files like old archive files if you wish to access old emails. Use the **ADD** button to locate and add them.
12. When you close the dialog there should be a new root item in the navigation pane which you may create folders and store email in

- *You may create any type of folder in the data file to store contacts tasks etc*

Storing items under this root folder removes them from the exchange environment and frees space on your exchange server.

Prepared by Stephen Moffat on 17March2010