Outlook 2010

Desk Reference Guide

Version 1.0

Developed by OR/WA IRM

Please remember to print back-to-back.

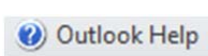
July 12, 2011

Microsoft Outlook 2010

This document has been developed by the OR/WA IRM staff to provide assistance during the Bureau's transition to MS Outlook. This is not a complete desk reference manual, but will provide the basic information on most tasks we do every day in our email environment.

For additional resources and information on Outlook 2010, please refer to the last section of this reference document.

References:

MS Office 2010 

MS Office 2010 Support Website:
http://office.microsoft.com/en-us/outlook-help/CL010254592.aspx

Contents

Introduction

Outlook is part of Microsoft Office and is designed to integrate easily with various Office components (Word, Excel, PowerPoint, etc.). It is the user-interface to MS Exchange, the email server.

Three Benefits to using Outlook:

1. BLM's Active Directory's authentication extends to Exchange. This enables a user to simply log on to a computer, start Outlook, and his/her Active Directory credentials will be passed to the Exchange server - no additional typing or separate logon will be required.

2. Outlook offers integrated functions. Outlook includes an address book, calendar, task list and virtual sticky notes. All pieces are integrated; dragging and dropping an e-mail message can create an appointment, a task, or a note. Tasks may be delegated with a click or two. Not only does the responsible receiver get informed of the task they've inherited, but the delegator can get regular status reports.

3. Outlook's user interface is familiar. Since Microsoft Office is BLM's primary Office Suite, the Outlook user interface is familiar to users, lowering the learning curve.

In addition to e-mail, Outlook has five modules: **Calendar**, **Contacts**, **Tasks**, **Notes** and **Journal**.

Calendar	Enables you to view and schedule appointments, events, and meetings.
Contacts	Use to store and keep track of addresses, telephone numbers, e-mail addresses and other information.
Tasks	Use to organize to-do lists, track task progress, and delegate tasks.
Notes	Use like electronic Post-it® Notes to write down information.
Journal	Track activities, time spent on any MS Office document, and time spent with a particular contact.

Getting Started

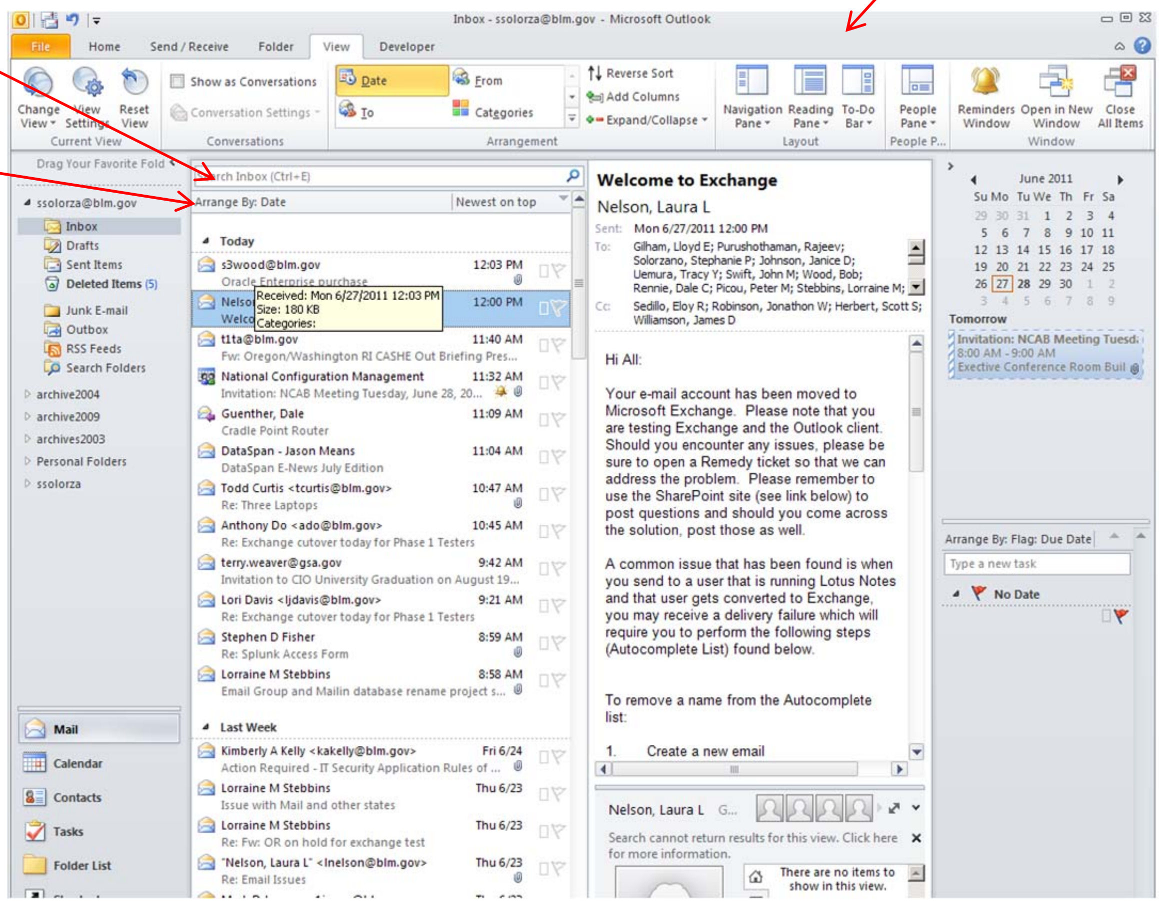
Welcome to MS Outlook 2010!

You can change page layout by clicking here….

Outlook's design mimics a daily planner with Email.

Double-click in the search field for Advance Search.

You can sort email views by clicking here….



You can switch between views by clicking here….

The **Outlook Today** page provides you with a snapshot of your day ahead by giving you a list of the day’s appointments and tasks, and gives you a count of unread e-mail messages.

The navigation system is on the left and the viewing area is on the right, similar to Lotus Notes. The viewing area changes as you move from module to module.

***Note**: If you don’t know what a button does, hover the mouse over the button for a few second and a ScreenTip appears.*

E-Mail Basics

Create a new e-mail message

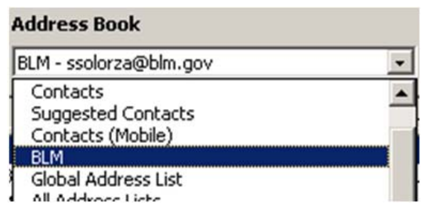
Start a new message

1. In **Mail**, on the **Home** tab, in the **New** group, click **New E-mail**.

2. In the **Subject** box, type the subject of the message.

Add recipients

Enter the recipients' names “last name, first name” or “short name.” Separate the names with a semicolon (;).



To select recipients’ names from a list in the Address Book, click the **To** or **Cc** button.

Note: You may want to set the address book to **BLM** first.

Add an attachment to an e-mail message

Files can be attached to an e-mail message. Also, other Outlook items, such as messages, contacts, or tasks can also be included with messages that you send.

1. On the **Message** tab, in the **Include** group, click **Attach File**.

2. Browse to and select the file that you want to attach, and then click Insert.

Open or save an e-mail message attachment

You can open an attachment from the Reading Pane, or from an open message. After opening and viewing an attachment, you may choose to save it to a disk drive. If a message has more than one attachment, you can save multiple attachments as a group or one at a time.

Open an attachment

Double-click the attachment.

Save an attachment

1. Click the attachment in the Reading Pane or the open message.
2. On the **Attachments** tab, in the **Actions** group, click **Save As**. You can also right-click the attachment, and then click **Save As**.

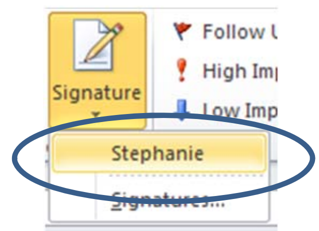
Add an e-mail signature to messages

You can create personalized signatures for your e-mail messages that include text, images, a logo, or even an image of your handwritten signature.

Create a signature

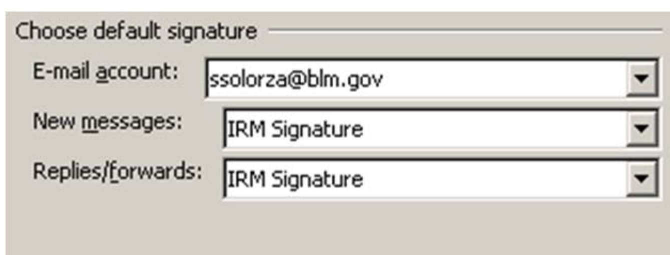
1. Open a new message. On the **Message** tab, in the **Include** group, click **Signature**, and then click **Signatures**.
2. On the **E-mail Signature** tab, click **New**.

Add a signature



In a new message, on the **Message** tab, in the **Include** group, click **Signature**, and then click the signature that you want.

To establish a default signature in all emails, select an email account.



Delegate someone else to manage your mail and calendar

Similar to having an assistant help you manage your incoming paper mail, you can use Microsoft Outlook to allow another person, known as a delegate, to receive and respond to meeting requests or responses and to send e-mail messages on your behalf.

By default, the delegate can read only the meeting requests and responses sent directly to the manager. The delegate does not have access to read any other messages in your Inbox unless you change the permissions. See page 22 for full description of permissions available.

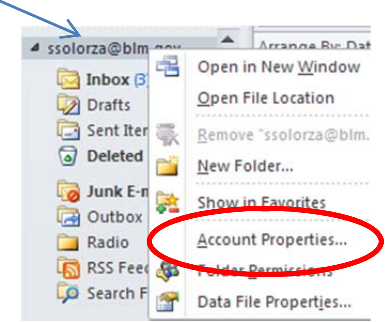
This is a 3-part process.

Part 1 – Delegate access to Folder:

1. Click the **File** tab.
2. Click **Account Settings**, and then click **Delegate Access**.
3. Click **Add**.
4. Type the name of the person whom you want to designate as your delegate, or search for and then click the name in the search results list.
5. Click **Add**, and then click **OK**.
6. In the **Delegate Permissions** dialog box, you can accept the default permission settings or select custom access levels for Exchange folders.
7. 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.
8. If you want, select the **Delegate can see my private items** check box.
9. Click **OK**.

Right-click your mailbox

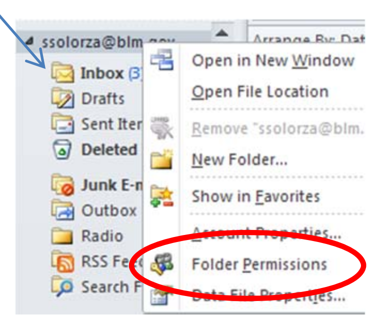
Part 2 – Grant permissions to Mailbox folder:



1. In your Mail view, right click your mailbox folder. Click **Folder Permissions**.
2. Click **Add**.
3. Type the name of the person whom you want to grant permissions to, or search for and then click the name in the search results list.
4. Click **Add**, and then click **OK**.
5. In the **Permission Level** drop down box, select the permission settings.
6. In the Other box, select **Folder Visible**. (This allows delegate to view your mailbox)
7. Click **OK**.

Right-click your In-box

Part 3 – Grant permissions to Inbox folder:



1. In your Mail view, right click your In-box folder. Click **Properties** and then click **Permissions**.
2. Click **Add**.

3. Type the name of the person whom you want to grant permissions to, or search for and then click the name in the search results list.
4. Click **Add**, and then click **OK**.
5. In the **Permission Level** drop down box, select the permission settings.
6. In the Other box, select **Folder Visible**. (This allows delegate to view your In-box)
7. Click **OK**.

Accessing another person's mail and calendar which has been delegated to you

Open another person's folders

This is a temporary view of the folder. You will need to repeat the process for future access.

1. Click the **File** tab.
2. Click **Open**.
3. Click **Other User's Folder**.
4. In the **Folder type** list, click the folder that you want to open.
5. In the **Name** box, enter the name of the person who granted you Sharing or Delegate Access permissions, or click **Name** to select from a list.

Note: To avoid this step in the future, add the person's mailbox to your profile.

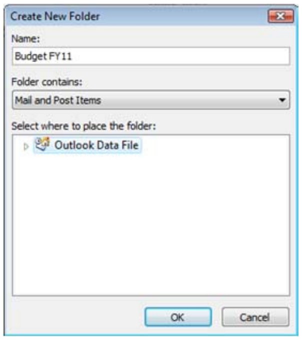
Add another person's mailbox to your profile

The mailbox will appear in the Navigation Pane underneath your Exchange mailbox folders.

1. Click the **File** tab.
2. Click **Account Settings**, and then click **Account Settings**.
3. On the **E-mail** tab, in the list, click your account.
4. Click **Change** and then click **More Settings** (lower right corner).
5. On the **Advanced** tab, under **Open these additional mailboxes**, click **Add**, and then enter the mailbox name of the person whose mailbox you want to add to your user profile. If you do not know the mailbox name, ask the person who granted you Delegate Access permissions.
6. Click **OK**.
7. Click **Next** and then **Finish**.
8. Close Outlook and restart.

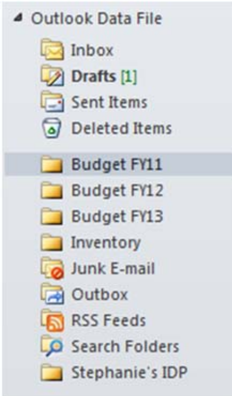
Managing Your Folders and Archives

Outlook's Personal Folder file (**outlook.pst**) contains all of your current data. Archived folder files (**archive.pst**) allow you to place all items you no longer use into a local directory (similar to Lotus Notes archives).



Creating a New Folder

1. Right-click any of the existing Outlook folders, and choose **New Folder**.
2. Enter a name for the new folder in the **Name** field.
3. Select the folder location from the **Select Where to place the folder** list box.
4. Click **OK**.



Moving an Item to another Folder

1. Select the item(s) that you want to move.
2. Drag the selected item(s) to the destination folder.

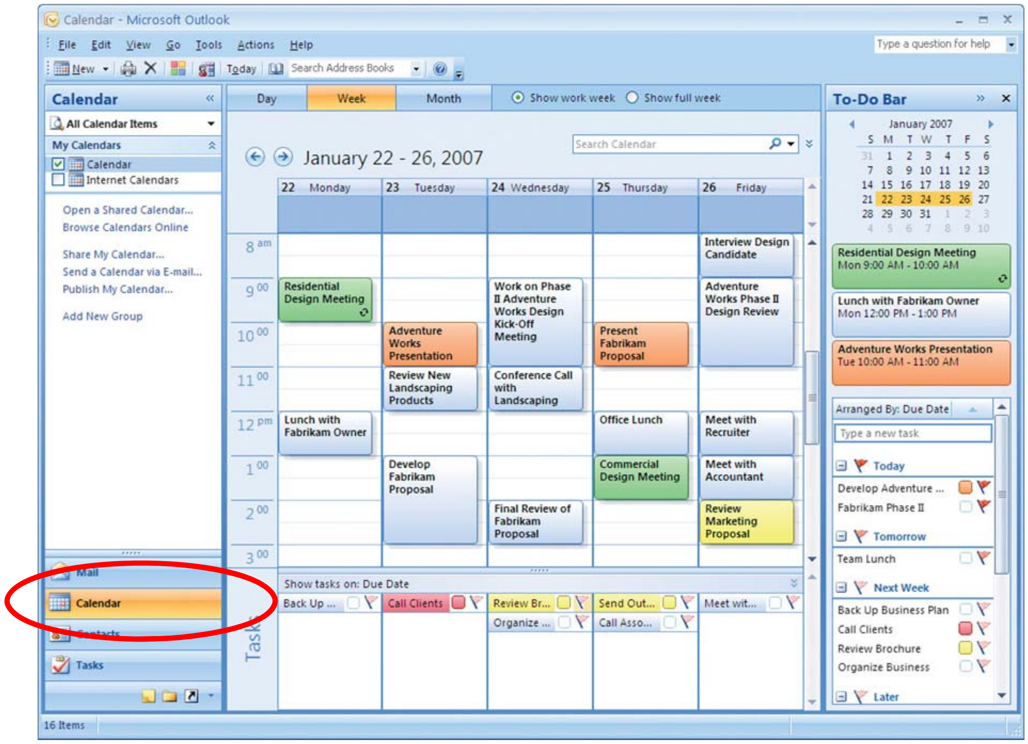
Archiving your Folders – Automatically

1. Right-click the folder you want to AutoArchive, and then choose **Properties**.
2. Click the **AutoArchive** tab.
3. Click **OK** to close the folder Properties dialog box.

Archiving your Folders – Manually

1. Choose **File**, click **Cleanup Tools,** and select **Archive**.
2. Choose the Folders you want to Archive.
3. Select a date to determine which items you consider "old." (optional)
4. Specify a different filename in the Archive file box (optional)
5. Click **OK**.

Working with your Calendar



Create a calendar appointment

Appointments are activities that you schedule in your calendar that do not involve inviting other people or reserving resources.

In the Calendar view, click **New Appointment** on the Home tab.

Schedule a meeting with other people

A meeting is an appointment that includes other people and can include resources such as conference rooms. Responses to your meeting requests appear in your **Inbox**.

In the Calendar view, click **New Meeting** on the Home tab.

Set a reminder

You can set or remove reminders for a variety of items, including e-mail messages, appointments, and contacts.

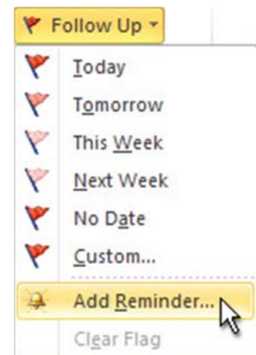
For appointments or meetings

In an open item, on the **Appointment** or **Meeting** tab, in the **Options** group, in the **Reminder** drop-down list, select the amount of time before the appointment or meeting when you want the reminder to appear. To turn a reminder off, select **None**.

For e-mail messages, contacts, and tasks

On the **Home** tab, in the **Tags** group, click **Follow Up**, and then click **Add Reminder**.

Note: You can quickly flag e-mail messages as to-do items by using reminders. Right-click the Flag Status column in the message list. If you have the message open, on the **Message** tab, in the **Tracking** group, click **Follow Up**, and then click **Add Reminder**.

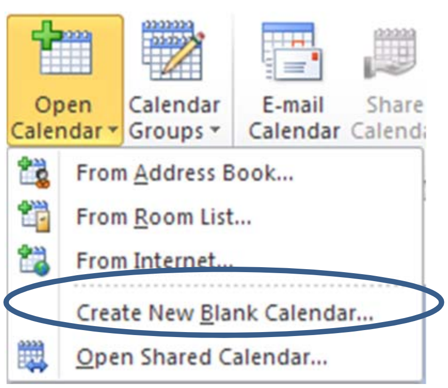


Create Additional Calendars

In addition to the default Microsoft Outlook **Calendar**, you can create other Outlook calendars. For example, you can create a calendar for your personal appointments.

1. In Calendar view, in the **Manage Calendars** group, click on **Open Calendar**.
2. Click **Create New Blank Calendar**.
3. Type in the new calendar name, select folder location, and then click **OK**.

The new calendar appears in the Calendar Navigation Pane.



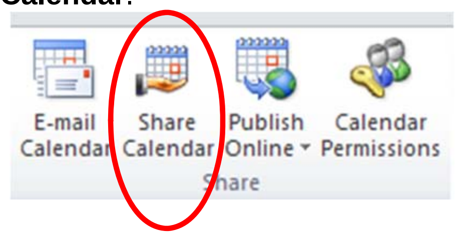
Sharing Calendars

You can create additional calendar folders and choose which of those folders to share. For example, you can create a calendar folder for a specific project and share it with your co-workers. Optionally, you can grant them permission to modify the events and appointments in the calendar.

> **Note**: Any message, contact, or task in Outlook can by marked private so that others don't see the item in a shared folder.

Sharing Calendars with Specific People

1. In the Calendar view, in the **Share** group, click **Share Calendar**.
2. In the Sharing Invitation that appears, enter the person that you want to share with in the **To** box.
3. Enter or select any other options that you want, and then click **OK**.



Revoke or change other people's access to your calendar folders

At any time, you can change or revoke someone's access permissions to your calendar folders.

1. In **Calendar**, in the Navigation Pane, right-click the calendar folder for which you want to change permissions. Click **Properties**.

2. Do one of the following:

   - **Revoke or change access permissions for everyone**

     1. On the **Permissions** tab, in the **Name** box, click **Default**.
     2. Under **Permissions**, in the **Permission Level** list, click **None** to revoke permissions or any of the other options to change permissions.

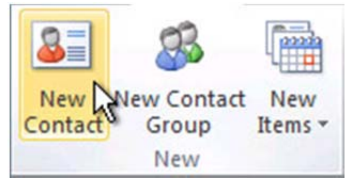
   - **Revoke or change permissions for one person**
     1. On the Permissions tab, in the **Name** box, click the name of the person whose access permissions you want to change.
     2. Under **Permissions**, in the **Permission Level** list, click **None** to revoke permissions or any of the other options to change permissions.

Managing your Contacts

Outlook is all about emailing, setting up meetings and keeping in touch with your contacts.

Contacts can be as simple as a name and e-mail address, or include additional detailed information such as street address, multiple phone numbers, a picture, birthdays, and any other information that relates to the contact.

Create a New Contact



1. In **Contacts** view, on the **New** group, click **New Contact**.
2. Enter a name and any other information that you want to include.
3. Click **Save & Close**.

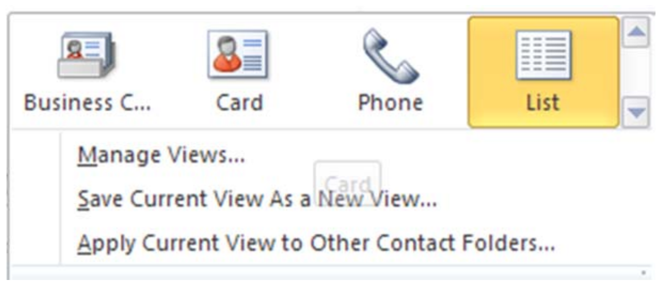
Add a contact from a message that you receive

1. *Open* or preview the message that contains the name that you want to add to your contacts.
2. *Right-click* the name of the sender who you want to make into a contact, and then *click* **Add to Contacts** on the shortcut menu.
3. Click **Save & Close**.

Note: there is no option to add contact information automatically to Contacts or Address Book when you <u>reply</u> to a contact.

Change the view of your contact list

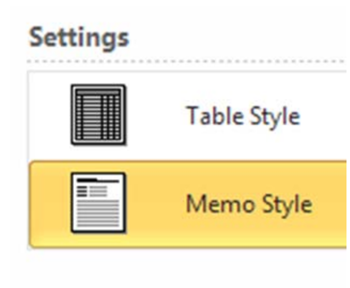
In the **Current View** group, select the view type. You can sort and customize each view, and even create your own view.



Print your contacts

In **Contacts**, you can print a single contact or pages of contacts displayed as cards or in phone lists. Several choices are available in the **Print** dialog box, and you can also customize those styles.

To print all of your contacts:

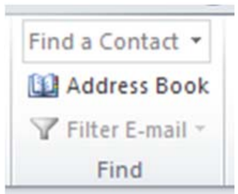


1. On the **File** tab, click **Print**.
2. Under **Settings**, click the print style you want.

Search for a person by name

You can do a quick search for a name without even opening up the Address Book, by using a search box in your Outlook window, or you can look for names in the Address Book itself.

Find names by using the Search Address Books box



At the right end of the **Home** tab, in the **Find** group, type the name of the contact that you want to find. Your Outlook Contacts are searched first. If no match is found, all the other available address books, including any that you have added, are searched.

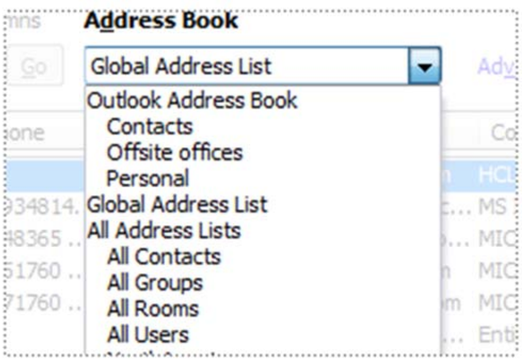
> **Note**: You can also enter a partial name, such as Judy L, first or last name, a "display as" name, e-mail alias, or company name.

Find names in the Address Book

1. On the **Home** tab, in the **Find** group, click **Address Book**

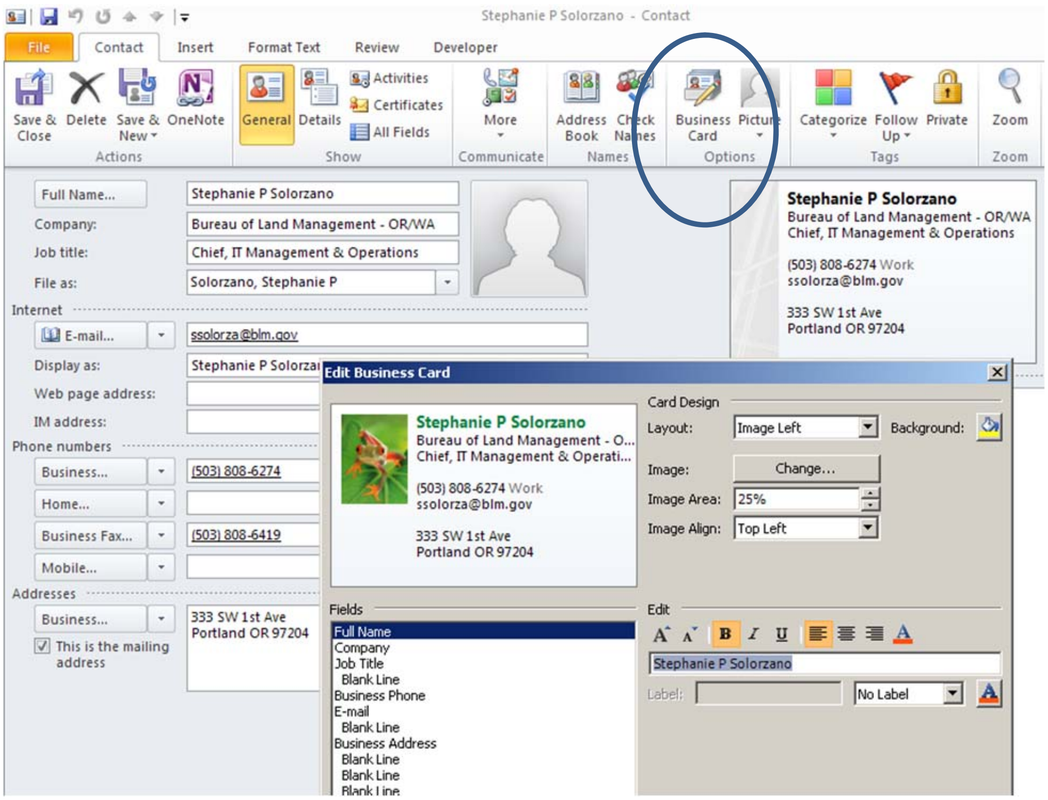
   Note: You can also open the Address Book from the **Tools** menu and in an open message. In the message, on the **Message** tab, in the **Names** group, click **Address Book**.

2. In the **Address Book** list, click the address book in which you want to search for names.
3. In the **Search** box, type the name, or part of a name, that you are searching for.



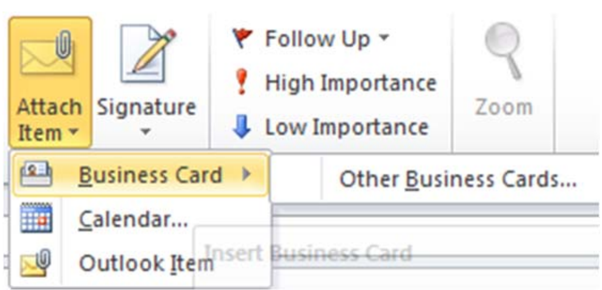
Electronic Business Cards

When you create a contact, an electronic business card is automatically created. You can edit the business card, change font, color and size.



Insert an Electronic Business Card in a message

1. In a new message, on the **Message** tab, in the **Include** group, click **Attach Item,** and click **Business Card**, and then click a name in the list.
2. If you don't see the name that you want, click **Other Business Cards**, click the name in the **Filed As** list, and then click **OK**.



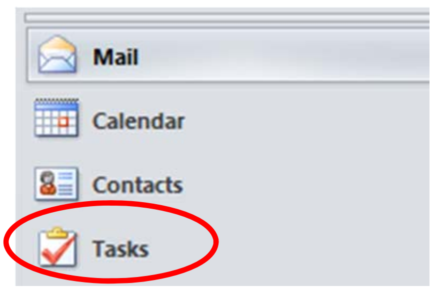
Tracking Tasks

Many people keep a list of things to do — on paper, in a spreadsheet, or with a combination of paper and electronic methods. In Microsoft Outlook you can combine various lists into one, get reminders and track task progress.

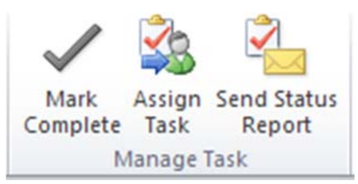
Create a Task

To assign a task, you first create the task, and then send it as a task request to someone. The person who receives the task request becomes the temporary owner of the task. This person can decline the task, accept the task, or assign the task to someone else. If the task is declined, it is returned to you.

Note: If you assign a task to more than one person at a time, you cannot keep an updated copy of that task in your task list. Therefore, to assign a project that involves more than one person and still have Outlook keep you informed of its progress, divide the project into separate tasks and assign each task individually.



1. On the **Home** tab, create a new task.
2. On the **Task** tab, in the **Manage Task** group, click **Assign Task**.



3. In the **To** box, enter the name or e-mail address of the person to whom you want to assign the task. To select the name from a list, click the To button.
4. In the **Subject** box, type a name for the task.
5. Enter the **Start date** and the **Due date** and the Status options that you want.
6. Select or clear the **Keep an updated copy of this task on my task lis**t check box and the Send me a status report when this task is complete check box.
7. If you want the task to repeat, on the **Task** tab, in the **Options** group, click **Recurrence**, select the options that you want, and then click OK.
8. In the body of the recurring task, type any information that you want to include in the task.
9. Click **Send**.

Note: If you assign a recurring task, a copy of the task will remain in your task list, but it will not be updated. If you select the Send me a status report when this task is complete check box, you will receive a status report for each completed occurrence of the task.

Track tasks that you have assigned

There are **three** ways to track the tasks that you have assigned to other people:

Automatically keep copies of tasks that you assign, and receive automated status reports

1. Click on the **File** tab, click **Options**.
2. Click **Tasks**.
3. Select the **Keep my task list updated with copies of tasks I assign to other people** check box.
4. Select the **Send status report when I complete an assigned task** check box.

View tasks that you have assigned to others

1. In the navigation pane, click **Tasks**.
2. On the **View** tab, in the **Current View** group, click **Change View,** and then click **Assigned.**

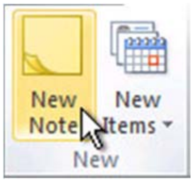
View the list of people who receive updated copies of an assigned task

1. Open the assigned task for which you want to view the list.
2. On the **Task** tab, in the **Manage Task** group, click **Send Status Report.**

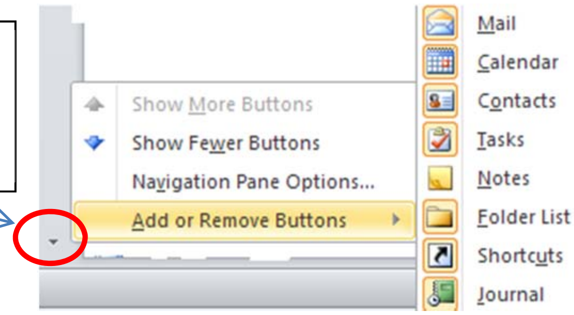
Taking Notes

Notes are the electronic equivalent of paper sticky notes. Use notes to jot down questions, ideas, reminders, and anything you would write on paper. These help keep you organized.

In **Notes**, in the **New** group, and click **New Note**. Type the note.



If you do not see a Notes icon, click the drop down icon in the lower left window to add more buttons. Click **Notes**



Keyboard shortcut   To create a note, press CTRL+SHIFT+N

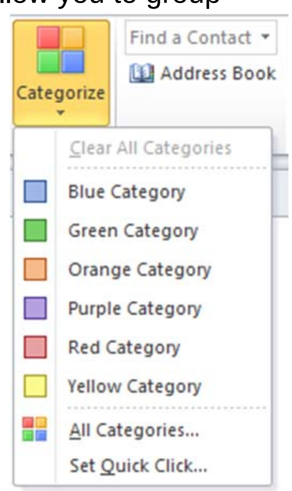
After you close a note, it appears on the right in the Notes module. To see the contents of a note, just double-click it.

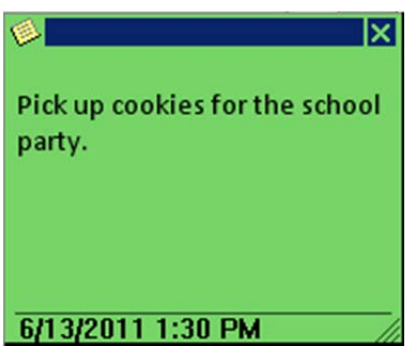
Tip: You can drag and drop the note onto your desktop, or a MS Office application.

Organizing Notes with Categories

You can change the default color to categorize your notes. Categories allow you to group similar notes together.

Note: You can assign more than one category to a note; however the color is taken from the last category you assign.





Recording in your Journal

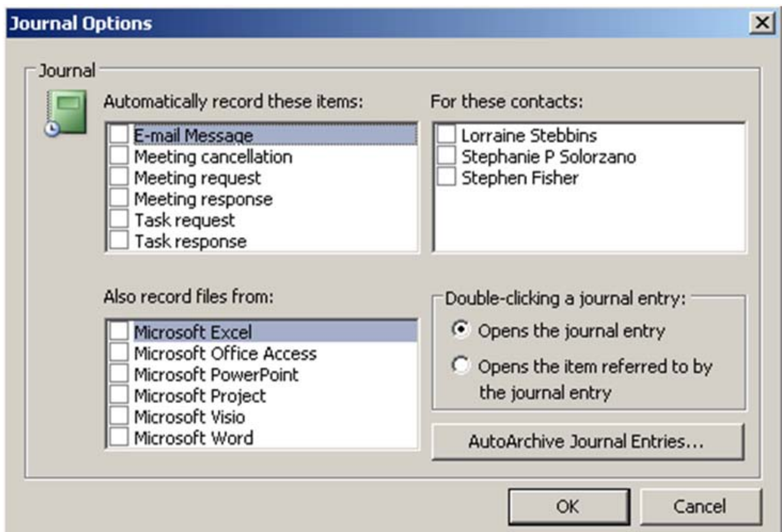
Journal automatically records actions that you choose which relate to specific, selected contacts and places the actions in a Timeline view.

> **Note**: To quickly access Journal, you can add the Journal view button to the Navigation Pane. At the bottom of the Navigation Pane, click the  button, click **Add or Remove** Buttons, and then click **Journal** .

Record items and files in a journal

Record items and files automatically

1. Click on the **File** tab. Click **Options**. Click **Notes and Journal**.
2. Click **Journal Options**.
3. In the **Automatically record these items** box, select the check boxes for the items that you want recorded automatically in **Journal**.
4. In the **For these contacts** box, select the check boxes for the contacts whose items you want recorded automatically.
5. In the **Also record files from** box, select the check boxes next to the programs whose files you want to record automatically in **Journal**.



Record manually

1. From any module in Outlook, on the **Home** tab, in the **New** group, click **New Items**.
2. Point to **Other** and click **Journal Entry**.
3. In the **Subject** box, type a description.
4. In the **Entry type** box, click the type of journal entry that you are recording.
5. Select other options that you want.

Outlook Folder Permissions

WITH THIS PERMISSION LEVEL (OR ROLE)	YOU CAN
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.

With author or editor permissions, a 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.

Outlook Help, Links and Resources

You can get additional information:

- Outlook Help on the Menu Bar 

- MS Outlook web page at
  http://office.microsoft.com/enus/outlook/FX100647191033.aspx?CTT=96&Origin=CL100626971033

- MS Outlook 2010 Help and How-To
  http://office.microsoft.com/en-us/outlook-help/CL010254592.aspx

- BLM National Training Center – Knowledge Resource Center
  http://www.ntc.blm.gov/krc/viewresource.php?courseID=483

- BLM National Service Desk:

  ✓ Enter a Help Desk ticket from the web at http://1800blmhelp.blm.gov/index.php
  ✓ Click the **Help Desk Ticket** button in your Lotus Notes e-mail "inbox"
  ✓ E-mail a request stating the problem to: **1800blmhelp@blm.gov**
  ✓ In situations where you have no network connection, call 1-800-blm-help, 1-800-256-4357.