John Jay College of Criminal Justice

BRAVO! Summer Employee Institute 2011
Expanded Uses of Microsoft Outlook Calendar

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This tutorial will introduce the new Outlook 2010 Client Interface and some new features that Microsoft has created to make users work more efficiently. It will also go into some expanded calendar uses such as creating meeting requests, using the scheduling assistant, calendar sharing and calendar collaboration.

Outlook 2010 can also assist you in Mail Merge all from the touch of a button. Creating quick steps is also a new feature that will make users work more efficiently by personalizing hot-keys to perform specific functions set by the user.

OUTLOOK EXCHANGE CLIENT:

The Outlook Exchange Client is an application that is installed on a desktop just like Microsoft Word or Excel. A client can only be accessed from the desktop is has been installed on. The Outlook Exchange Client does not primarily need internet connectivity to perform duties, but it does need connectivity to update changes and to receive and send emails. Apart from being an email application, it also contains a calendar profile, a contacts profile, and a task profile.

New Features:

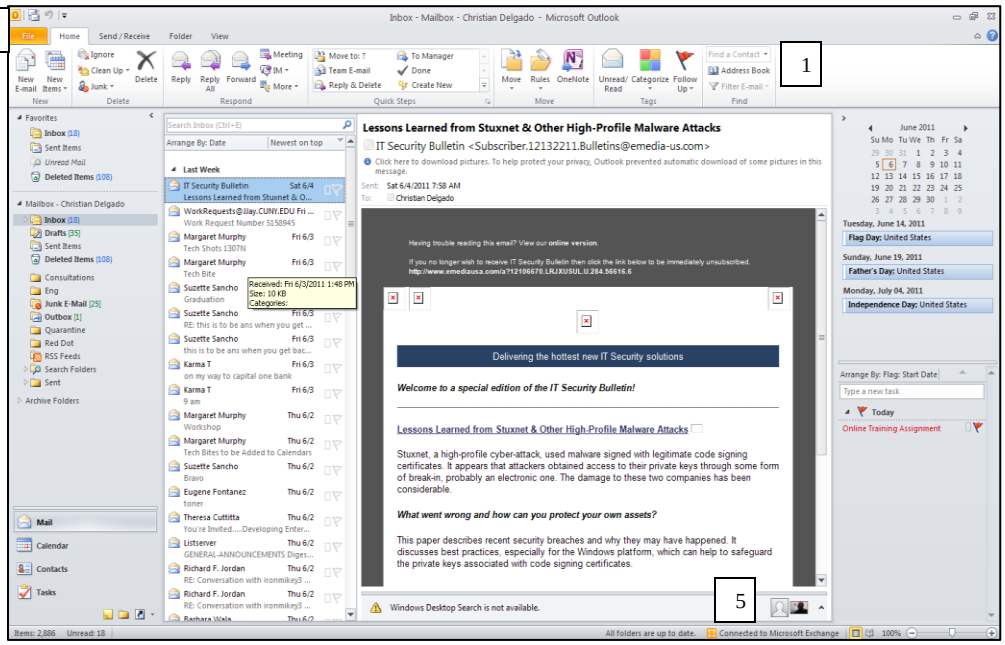
1. **Ribbon**: Makes functions easily accessible from one location.

2. **Backstage Tab**: Account maintenance and management.

3. **Conversation Management**: E-Mail maintenance, prevents clutter and keeps conversations grouped together.

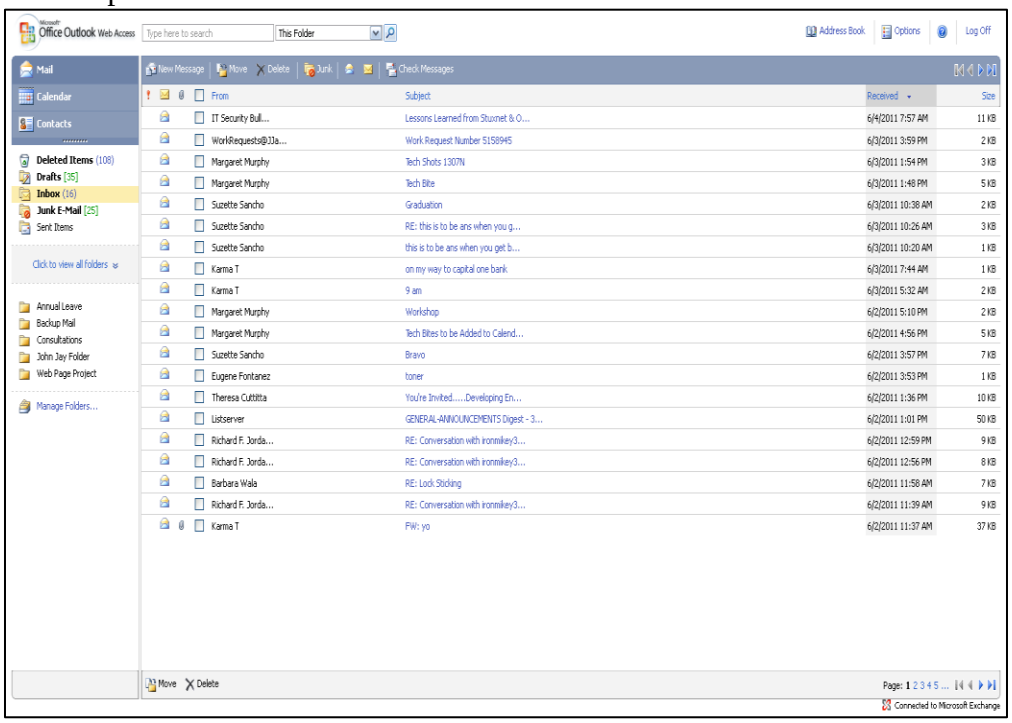
4. **Mail Tips**: Reduction of E-Mail traffic via prompts and warnings.

5. **Contact Pane**: Contact information is visually available of all email recipients.



OUTLOOK WEB APP (OWA):

Outlook Web App is the online profile for the Outlook Exchange account. This profile can only be accessed with the use of internet connectivity. It allows the user to work remotely on their Outlook Exchange account, whether it is at home, on vacation, or out of the office. A user can remotely access emails, calendars, tasks, and contacts using the OWA profile.

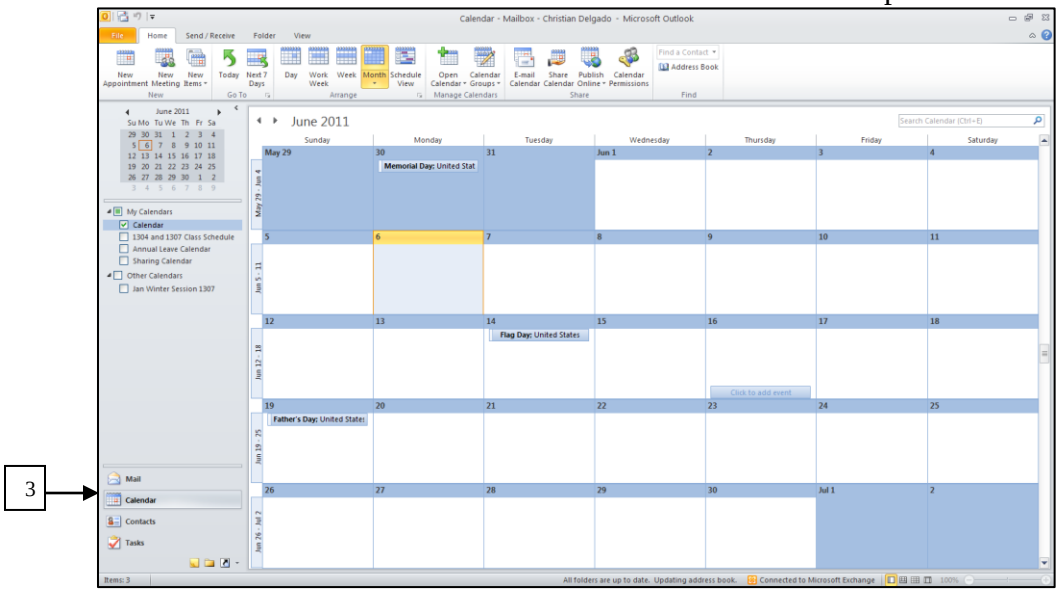


SCHEDULING ASSISTANT:

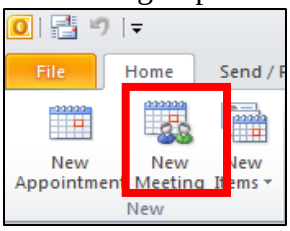
- The scheduling assistant will help you choose the best time to set up a meeting by locating the best available time for all attendees.
- The scheduling assistant will display the schedules of all the attendees requested to attend as well as the meeting requestor's schedule.
- From the scheduling assistant window you can add more attendees, and change the meeting time depending on attendee availability.
- Outlook Exchange will display a work day from 8:00am-5:00pm.
- Meetings that need to be scheduled after five can be scheduled using the **Start** and **End** time fields located at the bottom of the screen.

CREATING A MEETING REQUEST:

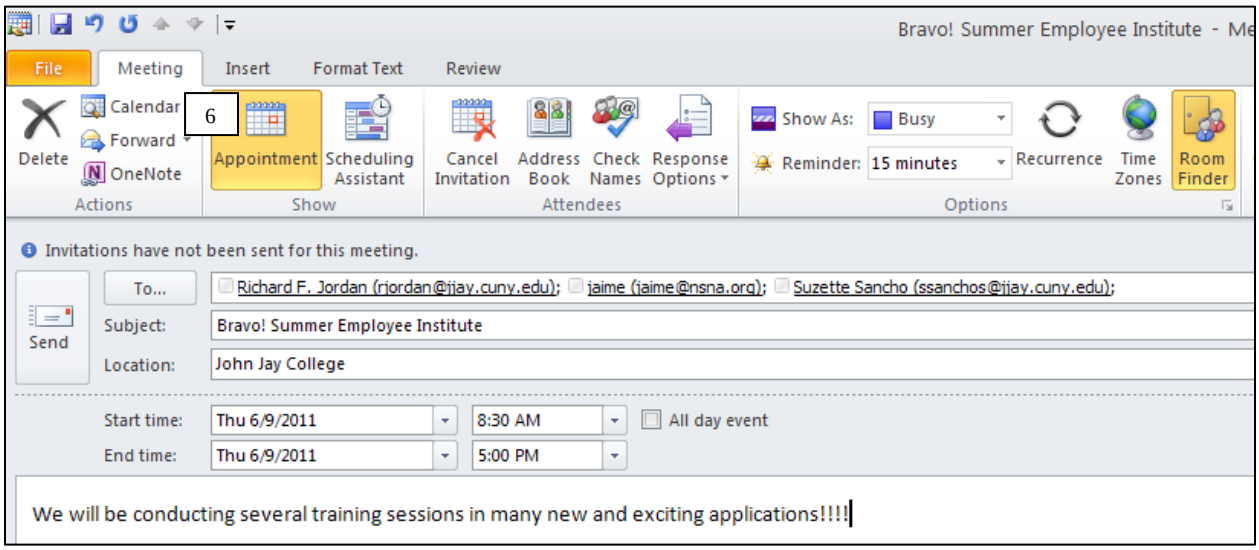
1. Start Outlook Exchange.
2. The Application will automatically open in the **MAIL** profile.
3. Click on the **CALENDAR** tab located on the lower left-hand corner to open the calendar profile.



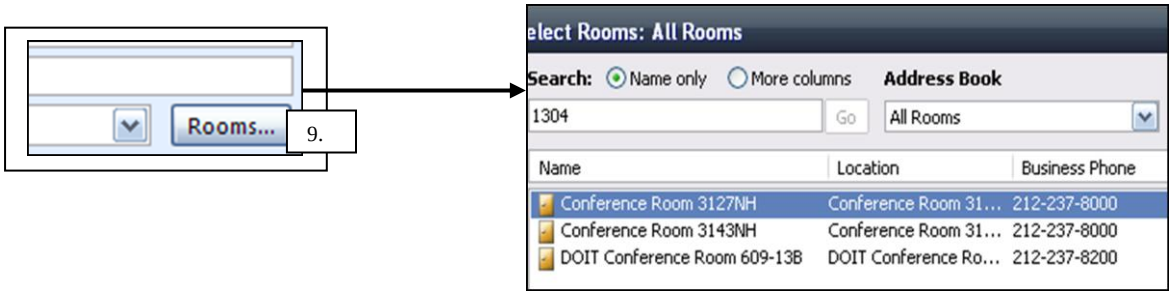
4. The calendar profile will open to display the current day, week, or month depending on the profile selected to display. The image above has the "month" profile selected.
5. Click on the **New Meeting** function, in the **NEW** group of the **Home** tab.



6. The Meeting Request window will open in the **Appointment** view highlighted in the ribbon.
7. Populate the fields with the required information such as attendees, subject, location, start and ending time, along with a brief message to set up the meeting.

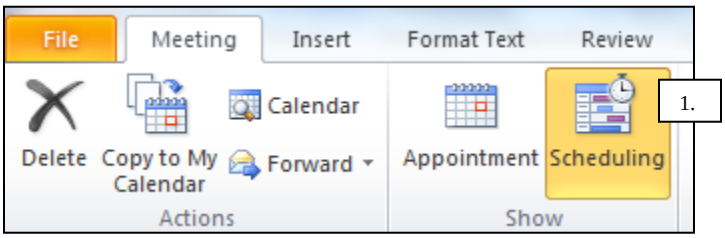


8. Add the attendees in the **To…** field by typing a name or an email address. If you click on the **To** button, the JJay Global Address List will open up. You may select attendees from there as well.
9. To choose a location, click on the **Rooms** button, you can choose a room from the populated list.



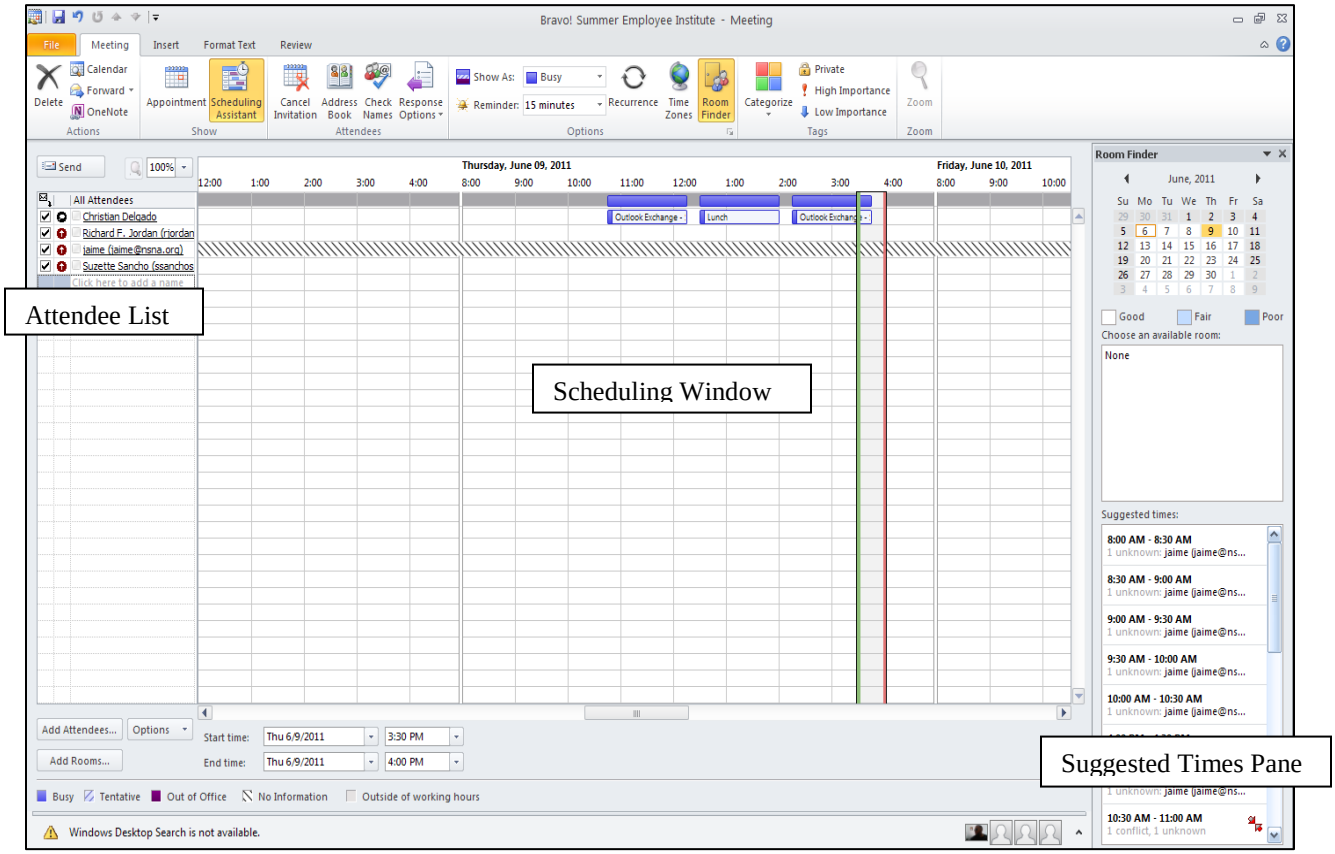
ACCESSING THE SCHEDULING ASSISTANT:

1. From the **Meeting** tab, in the **Show** group, click on the **Scheduling** option on the ribbon.

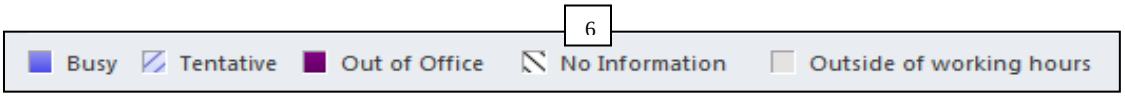


2. The **Scheduling Assistant** window will open to display an **Attendee** list, a **Scheduling** window, and a **Suggested Times** pane.

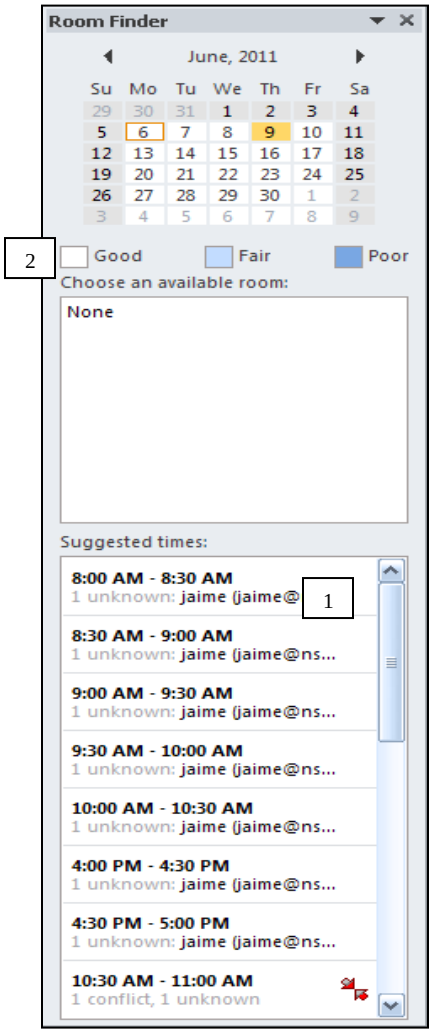
3. Attendees can be added in the **Attendee List** pane. In the space provide, insert the email or name of the person you wish to add to the meeting. Outlook Exchange will automatically pull an email address from the Global Address List when a name is inserted.
4. The Scheduling Window will display the status grids of the selected meeting members. Meetings are generally held between the hours of 8am-5pm.
5. The Suggested Times Pane will display the best and worst possible meeting times.



6. The status grid located at the lower portion of the screen describes the status bars found in the **Scheduling Window**.



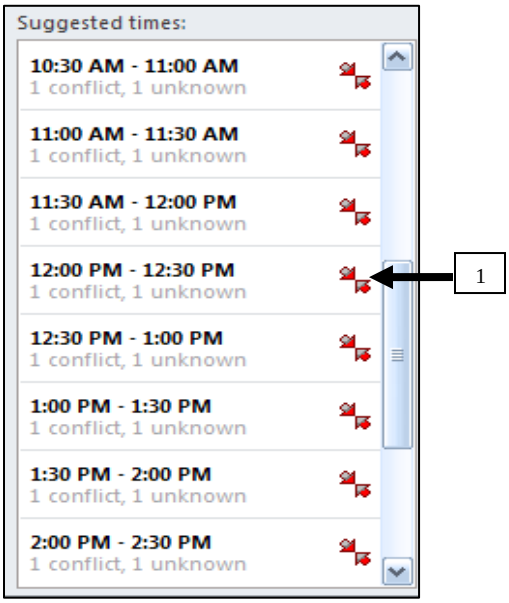
SUGGESTED TIMES PANE:



1. The Suggested Times pane will locate the best possible times to set a meeting by displaying tabs with possible conflicts.

2. The tabs are broken into three categories:
Grey=Good
Sky Blue= Fair
Dark Blue= Poor

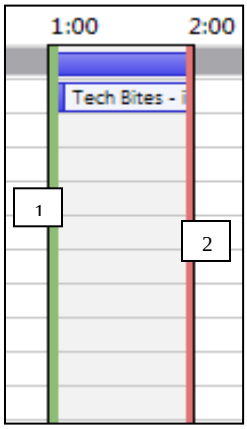
3. Click on any of the tabs that are classified as good, to automatically set the meeting time to the time displayed on the tab.



1. The red arrows within the tabs will display the attendees in conflict for that specific time period.

2. Click on the tab with the best possible meeting time for all attendees.

EDITING THE MEETING TIME:



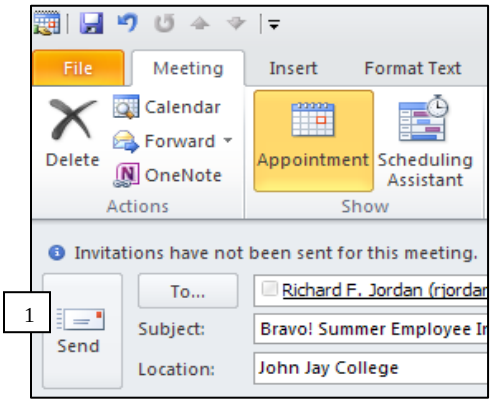
1. The Green line indicates the start time of the meeting.

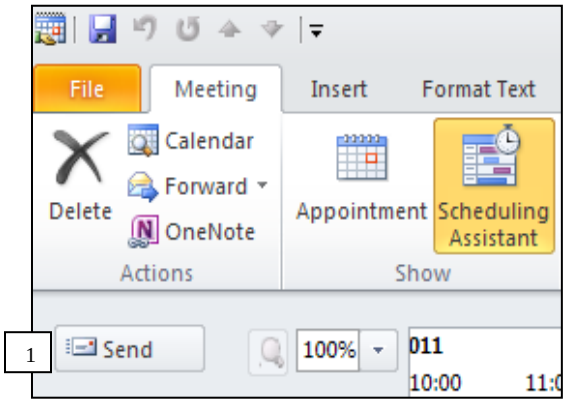
2. The Red line indicates the end time for the meeting.

3. Either line can be dragged to edit the starting and ending time. Left click over the line to grab it, then drag the mouse to edit the time.

SENDING THE MEETING REQUEST:

1. Click on **SEND** from either the **Appointment** or the **Scheduling Assistant** window.

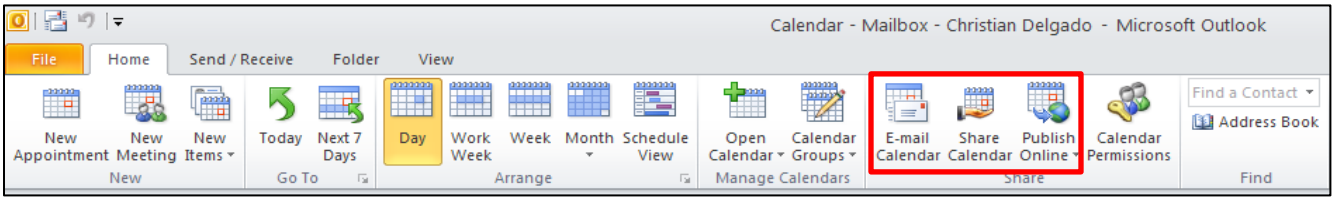




SHARING AN OUTLOOK CALENDAR:

You can share calendar information with coworkers or anyone whom you choose to in multiple ways using Outlook. You can share a calendar by e-mail, through the Exchange server, or by uploading and publishing it to the internet. Sharing a calendar will allow others to see what information you have populated on your Outlook calendar. *A calendar can only be shared while using the Outlook Client profile.

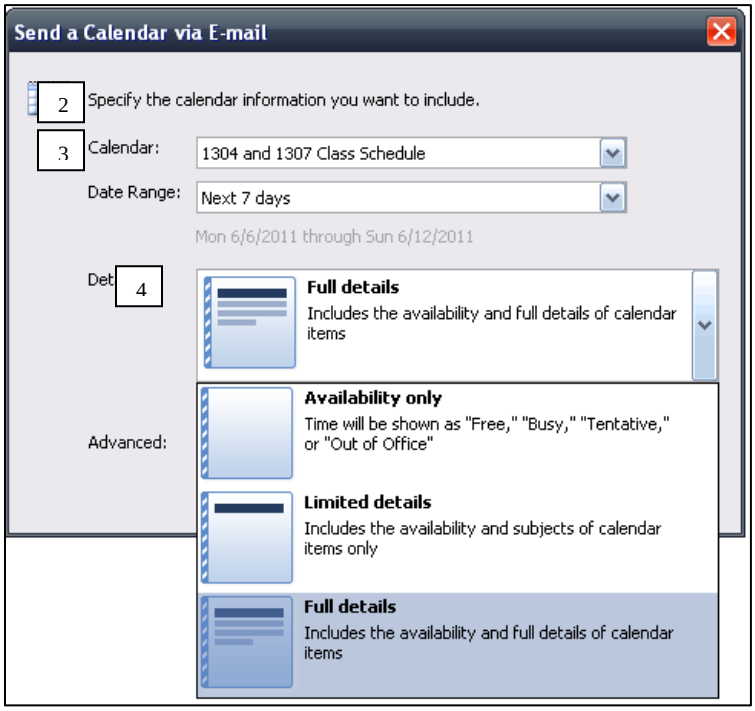
1. You must be in the calendar profile to share a calendar.
2. The sharing option will be viewable in the **Share** group on the Ribbon.



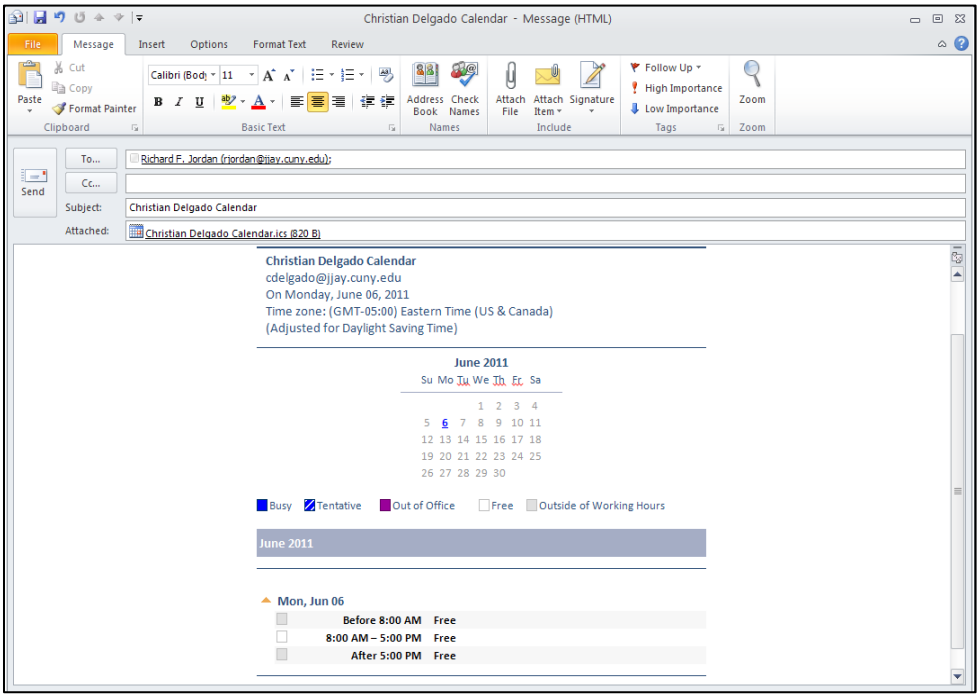
SHARE CALENDARS BY E-MAIL:

Calendars shared by e-mail arrive in the recipient's Inbox as e-mail message attachments, with a Calendar Snapshot in the message body. You can edit the Calendar Snapshot before sending; for example, you can change fonts or highlight days or appointments.

1. On the **Home** tab, in the **Share** group, click **E-mail Calendar**.
2. In the **Calendar** box, click the calendar that you want to send.
3. In the **Date Range** box, click the time period that you want the calendar to show.
4. Choose what details you will allow the recipient to view, and then click **OK**.

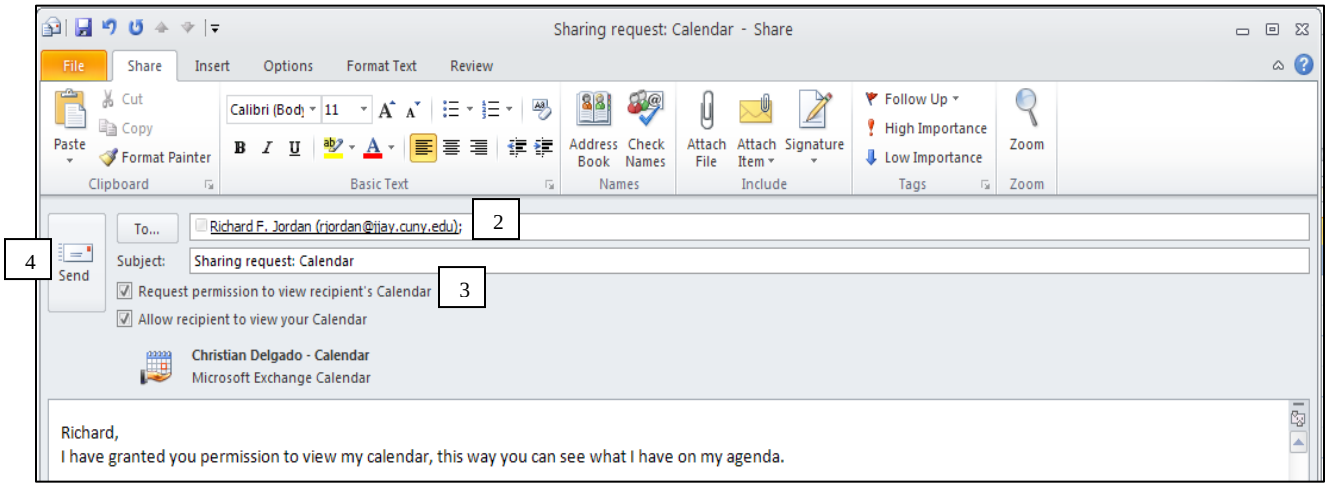


5. The calendar details will be sent to the recipient as an e-mail like the image below.



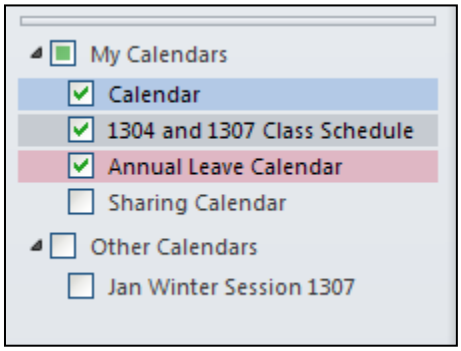
SHARE CALENDARS BY EXCHANGE SERVER:
Outlook Exchange Server enables calendar sharing with others who have Exchange accounts. Only those you have given permission can view your calendars. You will need to gain permission as well from other users to view their calendars.

1. On the **Home** tab, in the **Share** group, click **Share Calendar**.
2. In the To field, enter the recipient(s) whom you wish to share your calendar with.
3. You can ask the recipient(s) to grant you permission to view their calendar by checking off the option.
4. Click on **Send** to share the calendar vie Exchange Server.

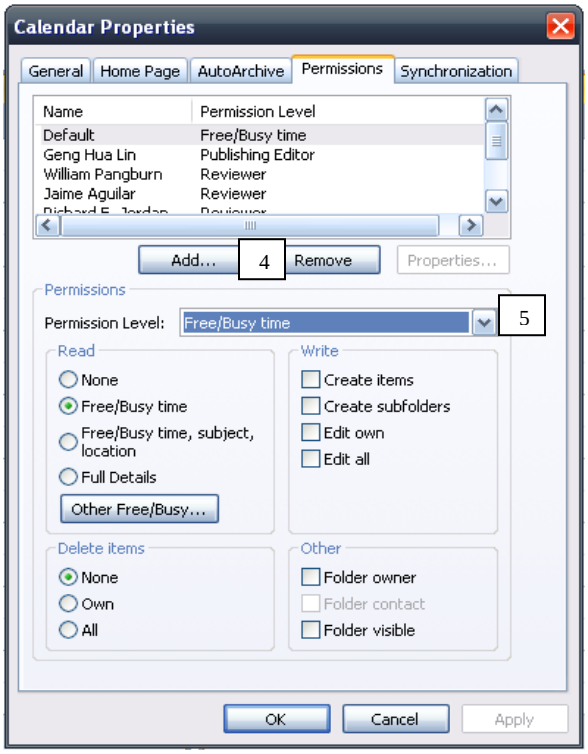


CALENDAR COLLABORATION:
You can collaborate with other Exchange users on calendars by changing their permission settings to any of your calendar(s). The other users whom you have given editing permissions can add, edit or delete any content on the calendar(s).

1. Select one or multiple calendars at a time from the calendar pane.



2. On the **Home** tab, in the **Share** group, click **Calendar Permission**.
3. The **Calendar Properties** window will open.

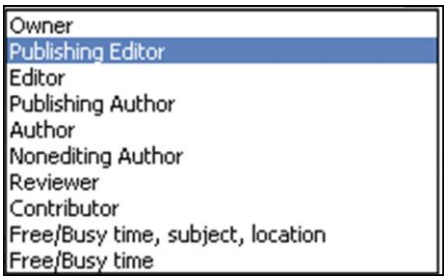


4. You can add or remove Exchange users by clicking on the Add or Remove buttons in the properties window.

5. You can change the permission level of any user simply by choosing a user and then changing their permission level from the dropdown menu.

6. Click on **OK** once all permissions have been set.

Permission Levels:



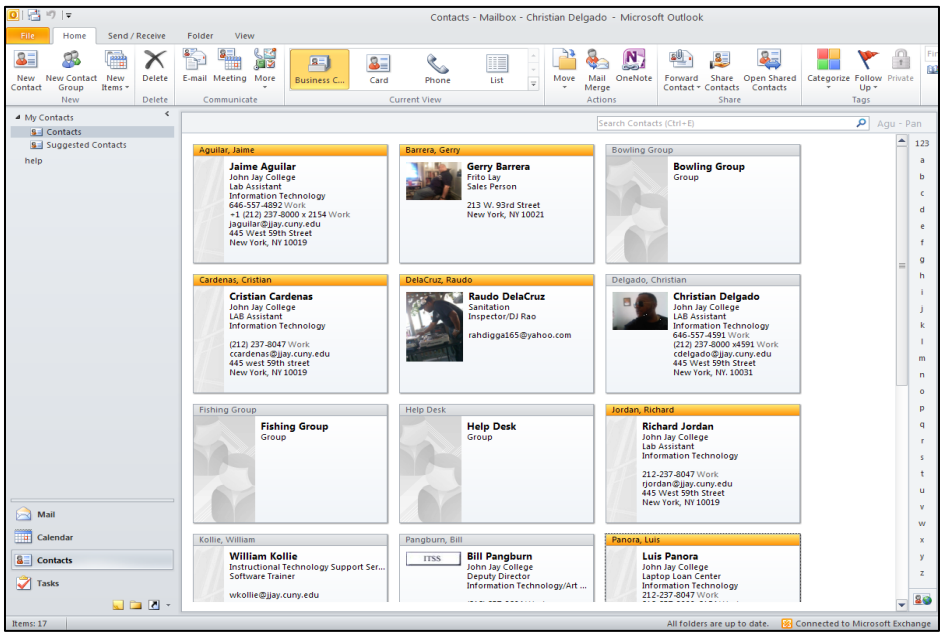
Once all permission changes have been activated, the collaborating users will be able to view the calendar from their Exchange account.

*****Based on the Permission Level, all other options in the Read/Write/Delete Items/ and Other sections will automatically change based on the permission profile.

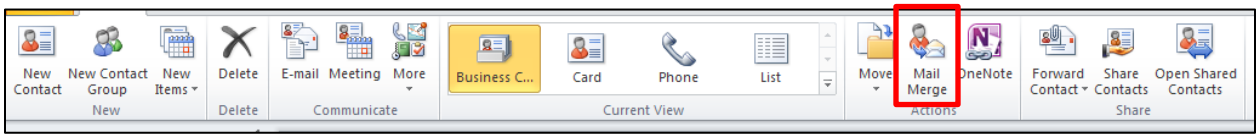
USING MAIL MERGE IN OUTLOOK EXCHANGE:

Outlook Exchange allows you to create labels, envelopes, letter headings and much more all from the touch of a button on the ribbon.

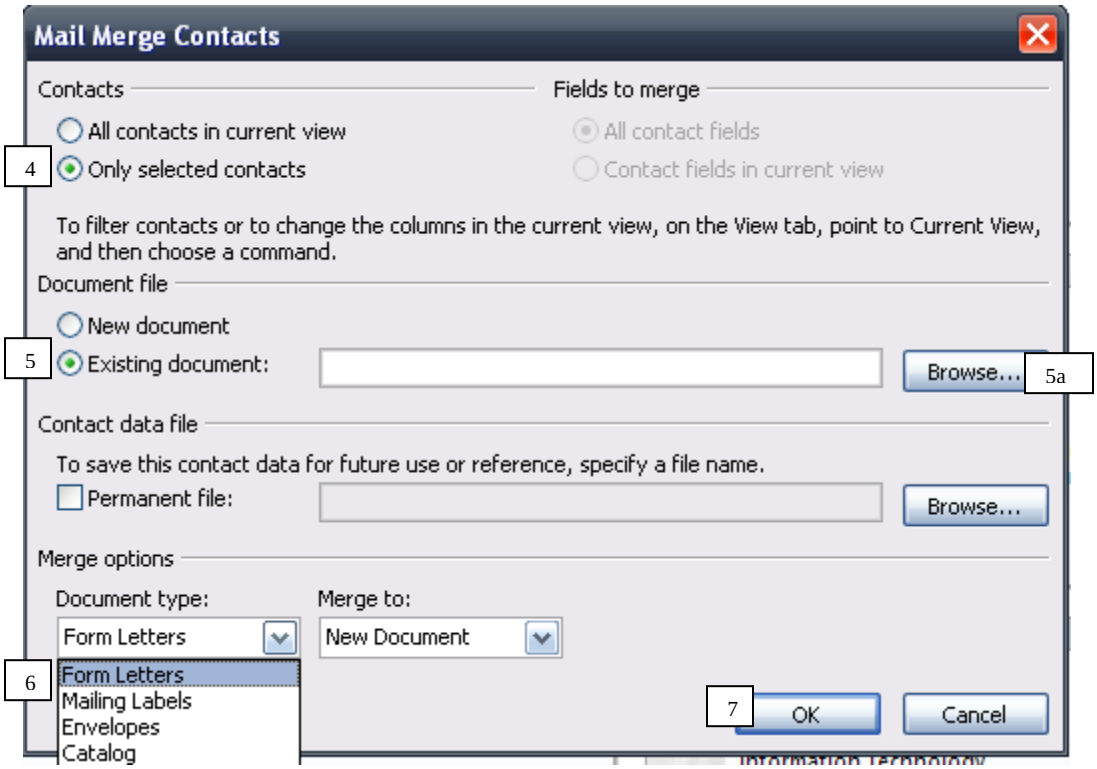
1. Open up the **Contacts** profile.



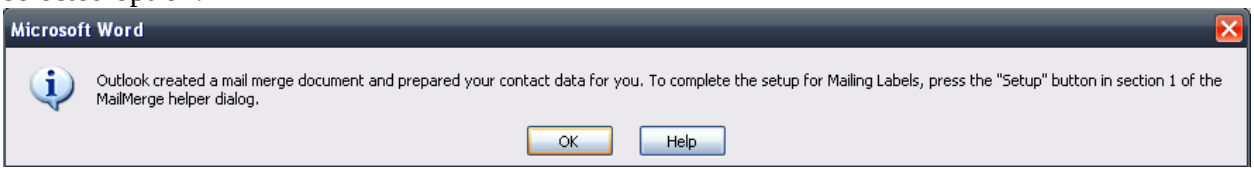
2. Select the contacts you will be using for the mail merge.
3. On the **Home** tab, in the **Actions** group, click **Mail Merge**.



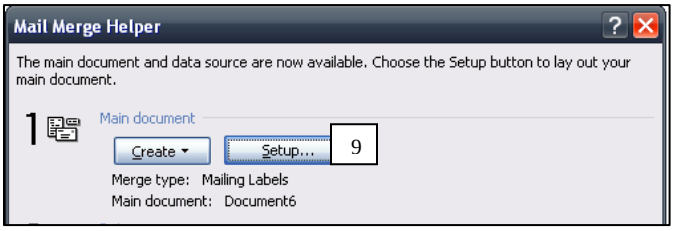
4. Click on **Only Selected Contacts**.
5. You can choose a file by using the **Existing Document** option. Click on **Browse** to select the file.
6. In the **Merge Options** section, you can choose the type of stationary the merge will be added to.
7. Click on **OK** once all the necessary options have been selected.



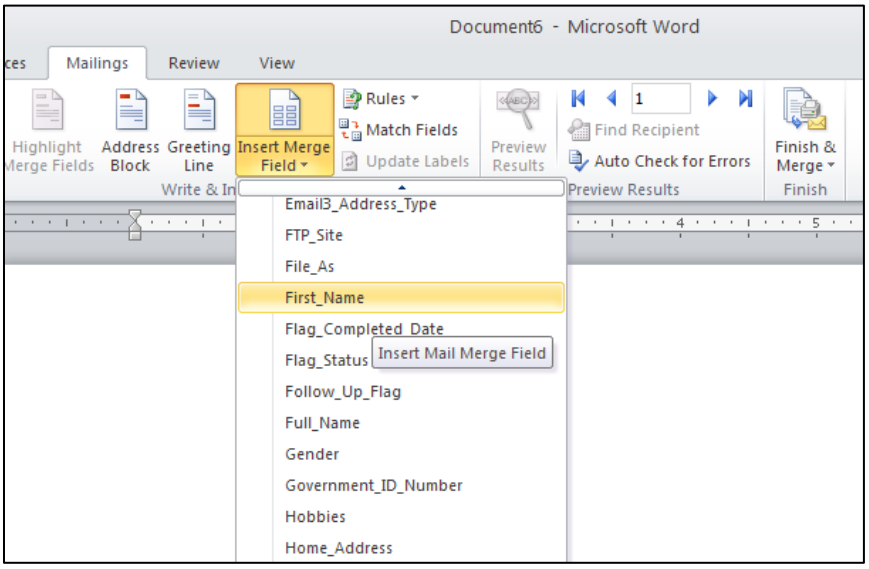
8. Outlook will automatically open up a new document or an existing document, depending on the users selected option.



9. From the **Mail Merge Helper** window, click on **Setup** and begin inserting the fields you would like in your stationary or document.



10. On the ribbon, click on Insert Merge Field and start by inserting the First Name.

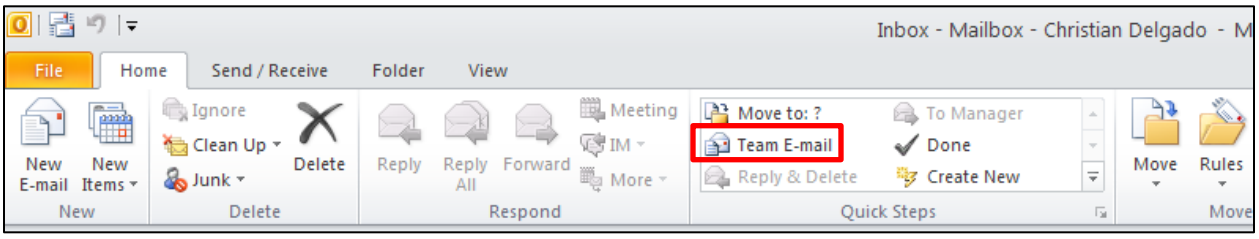


11. You can continue to insert the other fields by following step 10.
12. You can print out the document or print out labels, or populate an envelope using Mail Merge from Outlook Exchange.

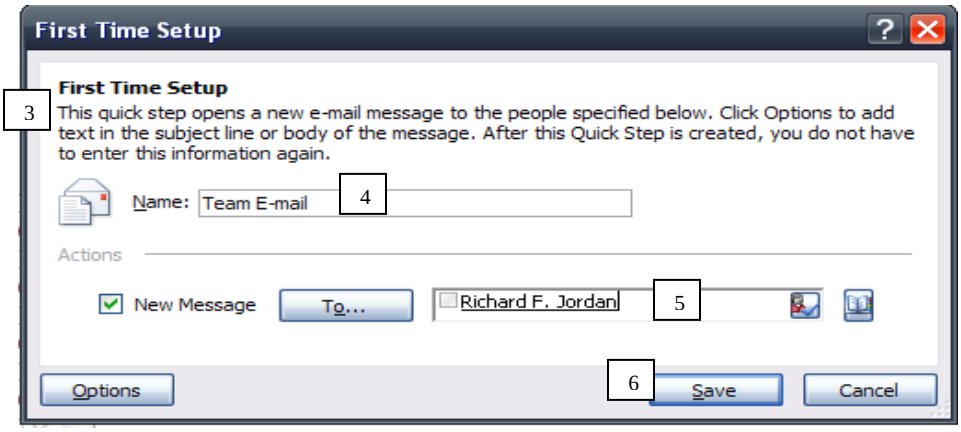
USING QUICK STEPS IN OUTLOOK EXCHANGE:

Quick Steps is a very good way to increase your productivity while at work. You can use an existing quick step function available in Outlook or design a quick step to perform multiple tasks all from the touch of a button. The quick step functions are found in the Mail profile in Outlook..

1. On the ribbon in the **Quick Steps** group click on **Team Mail**.



2. Every Quick Step has a description of what the function will perform.

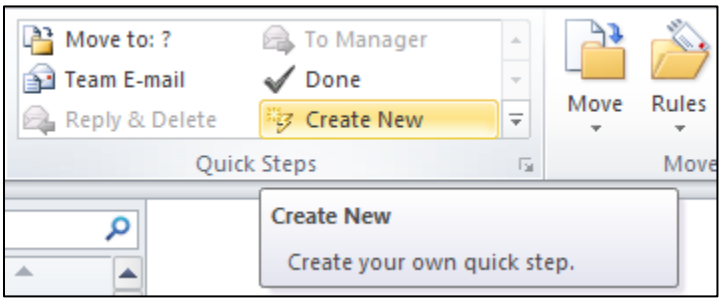
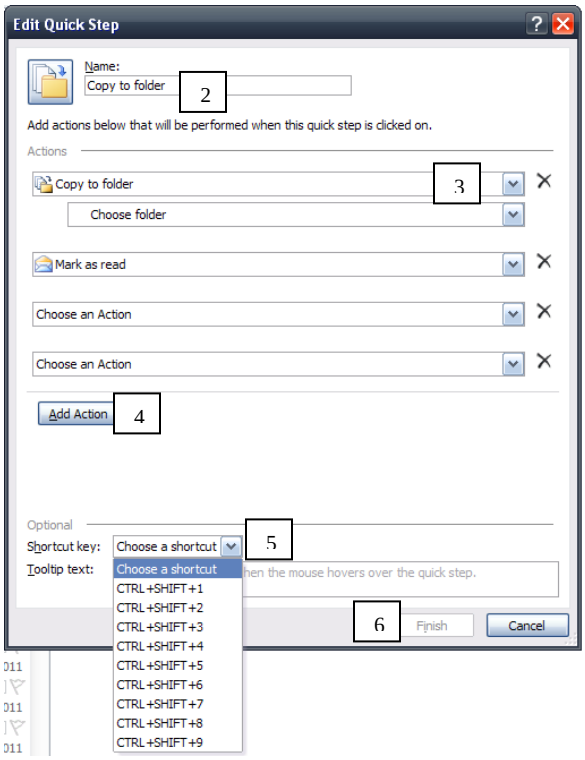


3. You can re-name the function in the **Name** field.
4. Populate the **To** field with the recipients you wish to include in this email group. Recipients can be chosen from the global address list.
5. Click on **Save** when all the recipients have been added.
6. After the function has been created, every time you click on **Team E-Mail** in Outlook, a new message window will pop-up with the recipients already added to the **To** field.

CREATING A PERSONALIZED QUICK STEP:

Outlook allows you to create your own Quick Step function using the Create New option in the ribbon.

1. Click on the Create New option in the Quick Steps group in the ribbon.



2. In the Edit Quick Step Window start by naming your quick step.
3. Choose an action from the actions list, change a status, or categorize a message.
4. Click on the **Add Action** button to accept the function and move to the next.
5. Create a **Shortcut Key** to perform this quick step.
6. Click on **Finish** to create your quick step.