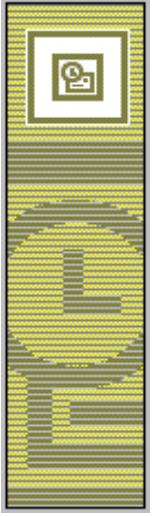


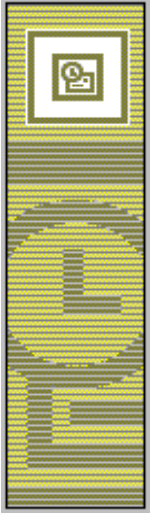
Using Outlook 2000:

An Overview

- *Introduction*
- *Reading E-Mail Messages*
- *Sending E-Mail Messages*
- *Adding and Viewing Contacts*
- *Using Outlook's Calendar*
- *Inviting Others to a Meeting*
- *Responding to a Meeting Invitation*
- *Setting Up Out of Office Messages*
- *Accessing Outlook Over the Web*
- *Getting Help*

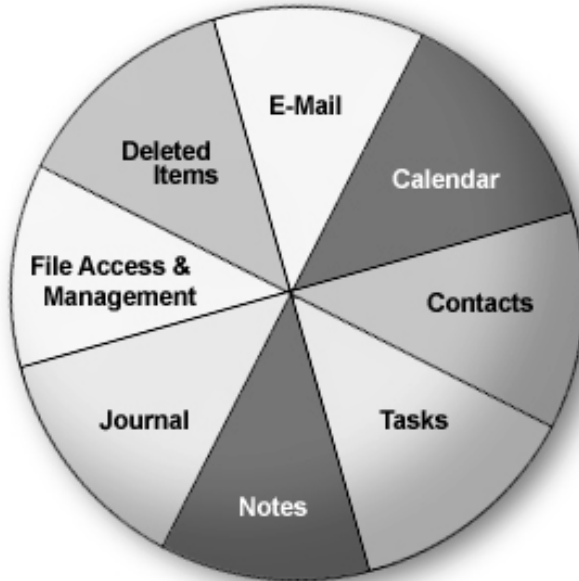
Computing Services
August, 2001





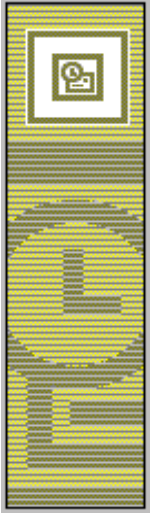
Introducing Outlook2000 - Your Personal Information Manager...

Microsoft Outlook coordinates your e-mail, calendar, contacts, and tasks. It allows you to write yourself notes, track your activities in a journal, manage your files, and even browse the web and save shortcuts to your frequently visited pages.



Outlook can be used alone, or with an Exchange Server. The Exchange server adds many more features to Outlook, such as the ability to see other Exchange user's calendars and to easily schedule meetings, the ability to delegate permission to access e-mail and calendar entries to other co-workers, the ability to send "out of office" messages with conditional responses, the ability to easily access e-mail via a web from anywhere, and more.

At the Business School, we use Outlook software on personal computers to access our Exchange Server. Think of Exchange as the back-end server, and Outlook as your "client," or front end software that you are using to access the information that resides on the Exchange server.



Please note: You can use any e-mail client to read your Exchange e-mail (such as Eudora). However, for full features, you need Outlook.

Outlook is our new supported software for the Business School community.

Which Version are We Using?

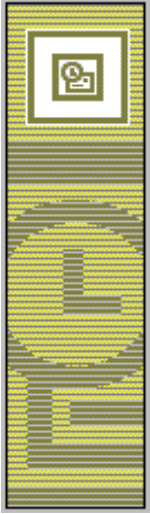
There are several variations of Outlook, including Outlook98, Outlook Express, and Outlook2000. On new Business School computers, you will be using Windows 2000 with Office2000, which includes Outlook2000 and Internet Explorer 5.

In other words, the standard UMBS configuration includes:

- *Windows 2000 Operating System*
- *Office 2000 Professional (Word, Excel, PowerPoint, Access)*
- *Outlook 2000 with Internet Explorer 5 (required)*

Watch Out for the Expanding Menus...

Please Note: Office 2000 uses a smart menu scheme that only displays the most recently used commands, so many commands on the menu may not be displayed. If you can't find a command you think should be under a certain menu, look to see if there is a double arrow at the bottom of the toolbar - double click on this arrow to expand the menu. The next time you use the menu, the command should be visible and higher up on the menu.



Opening Outlook

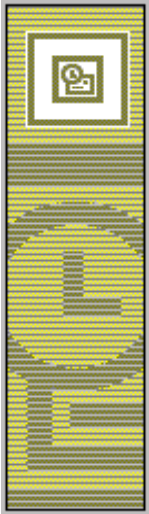
Double click on the Outlook Icon from your desktop or select it from your Start - Programs menu.

If you are the only person using your computer, when you open Outlook it automatically detects your password from when you logged your computer onto the network.

Depending on what other options for Outlook are set up for you on your computer, you may be prompted to select your "profile" and/or enter your password to log in - this is especially important if you share a computer with co-workers.



For general security, we recommend using a password-protected screen saver. This is a safe, secure and simple way to keep all of your files, e-mail, and shared network resources secure. See the handout "Creating a Password-Protected Screen Saver Desktop Icon" for instructions.



The Outlook Window:

Outlook has a convenient "Outlook Bar" with shortcuts to the various Outlook functions, and a convenient "Folder List" (similar to the Windows Explorer) that are visible in any mode. Turn the Outlook Bar and Folder List off and on using the View menu.

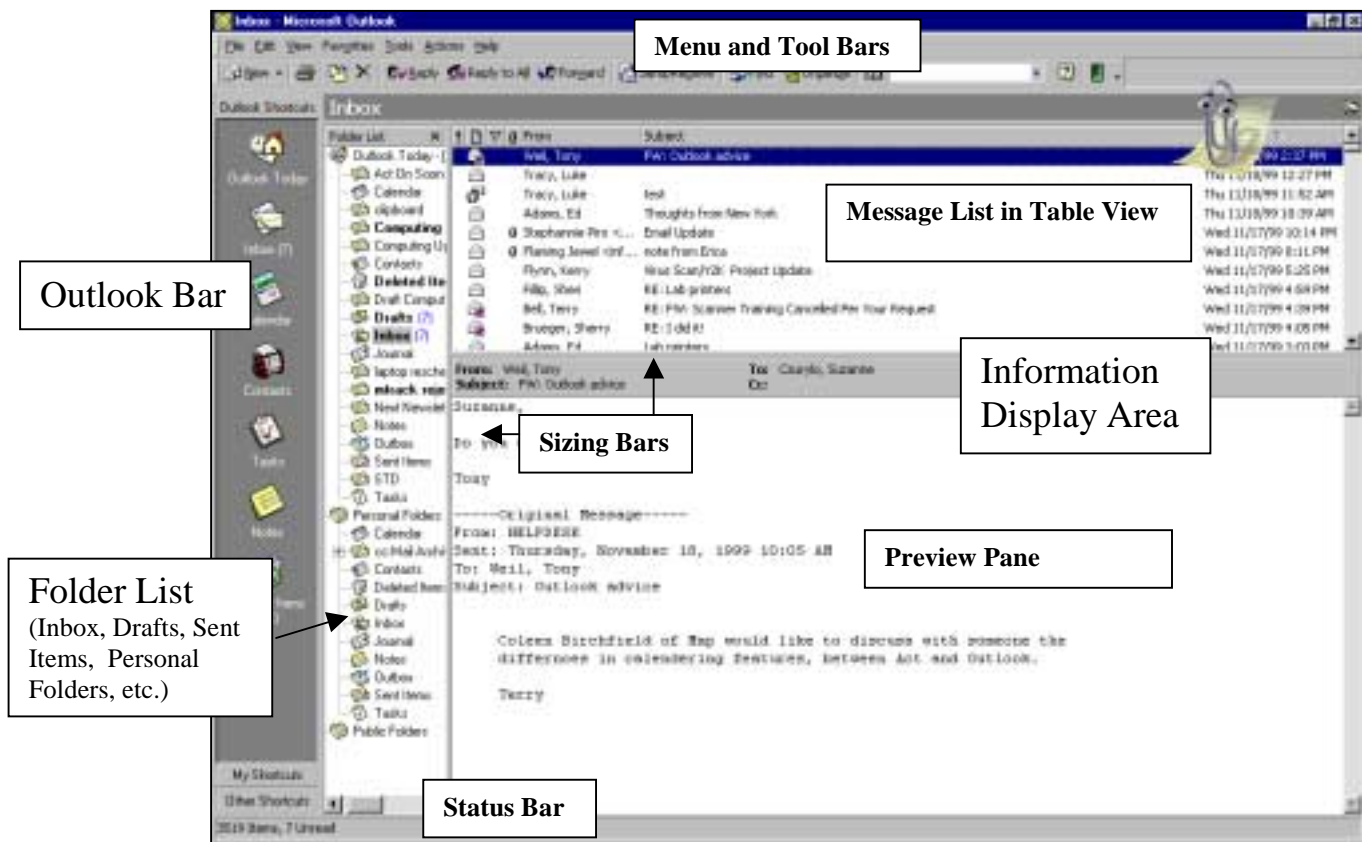
Use the Outlook bar on the left to switch between the different modes. Navigate to different folders using the Folder List. Note that you receive the same result by clicking on the Inbox icon on the Outlook bar or by clicking on the Inbox Folder in the Folder List - the Outlook bar icons are merely shortcuts to these folders. Information is displayed in the center area.

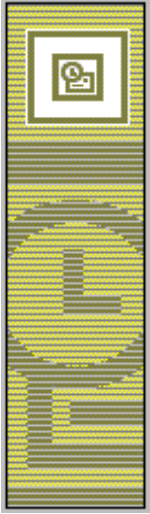
Outlook typically opens in the Inbox mode. You can also set the Outlook Today mode to open first for a quick synopsis of your daily calendar, new messages, and task list. (Go to the Outlook Today icon, and choose Customize Outlook Today in the top right corner to set this up.)

Following is the Outlook window displaying the Inbox:

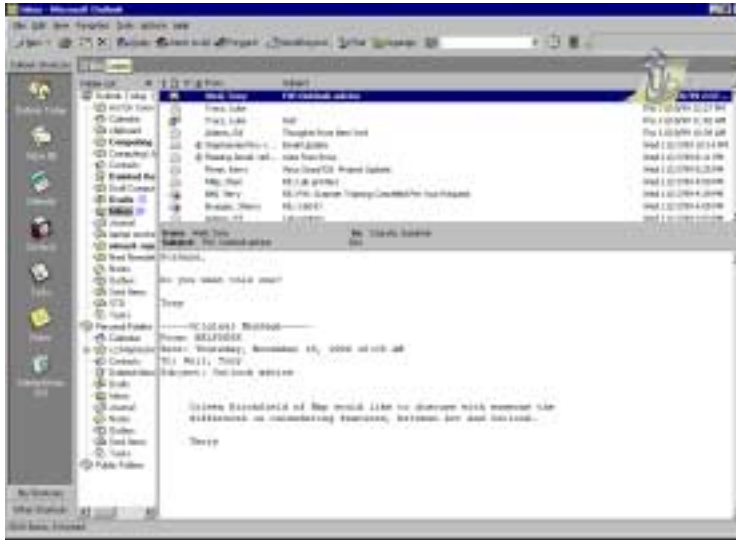
Worth Noting: Menu options and toolbar functions are "smart" - they relate to the current module you are in.

For example, if you are in the Inbox, the New button on the toolbar will automatically begin a new message, but if you are in Contacts, then that same button will create a new contact.





Reading E-Mail Messages in Outlook

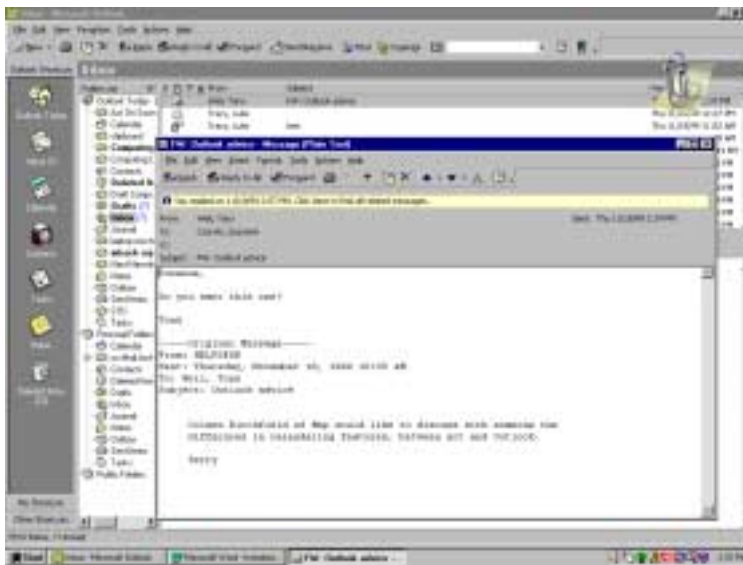


Single click on a message and it will automatically display in the preview pane in the bottom half of the window.

The width between the window panes can be adjusted by dragging your mouse on the border between them.

Use the buttons on the Standard Toolbar to reply to the active message.

Tip: use the space bar to scroll through your messages along with the delete key to quickly and easily manage your inbox.



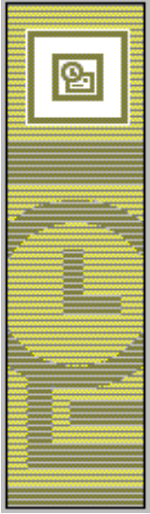
Double click on a message and it will open in a separate window.

Use the buttons on the toolbar in that window to reply or forward the active message.

If you do not wish to keep the message, click the Delete button on the toolbar in the open message window, or select the message in the Inbox table and press Delete.



What Happens to Your Deleted Items? Similar to the Recycle Bin, deleted messages are moved to the "Deleted Items" folder and not truly removed from the server until you empty this folder. To empty the folder, right click on the "Deleted Items" icon in the Outlook bar and choose "Empty Deleted



Items Folder." You can also automatically empty it every time you close Outlook - set this on the Tools - Options - Other tab.

Read and UnRead Messages: Outlook marks messages as "Read" or "Unread." Unread messages appear in bold, while read messages are dimmed. In typical setup, viewing a message in the preview pane marks it as "read."

Filtering Your Messages: On the Advanced Toolbar, there is a button to filter your inbox in many different ways. It is recommended you turn this Toolbar on - go to View - Toolbars - Advanced Toolbar (don't worry - there is nothing really "advanced" or hard about it!).




Moving Messages Into Folders:

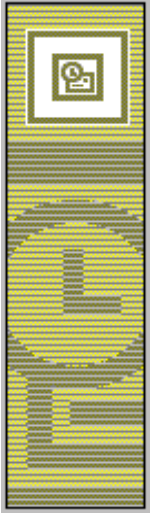
Turn on the Folder List from the View menu if it is not visible. Scroll, expand or collapse the folder structure as necessary so that your desired folder is visible. Drag the message from your inbox to the folder.

To move a file from one folder to another, select the folder so that the file appears in the list, and drag it to the new destination.

To create a new folder, select the location where you want it in the Folder List, then choose File - New Folder, or right click in a blank area of the folder list and choose New - Folder. Enter the Folder name.

 Note your Sent mail folder.

 Note your Drafts folder. This will be used for Drafts you create in Outlook. If you begin a message, and use the X box to close the window that the message is in, Outlook will prompt you to save it as a draft in this folder.



Sending E-Mail Messages in Outlook

Go to the Inbox and click on the New button on the toolbar, choose File - New - Message, or press Ctrl+N.

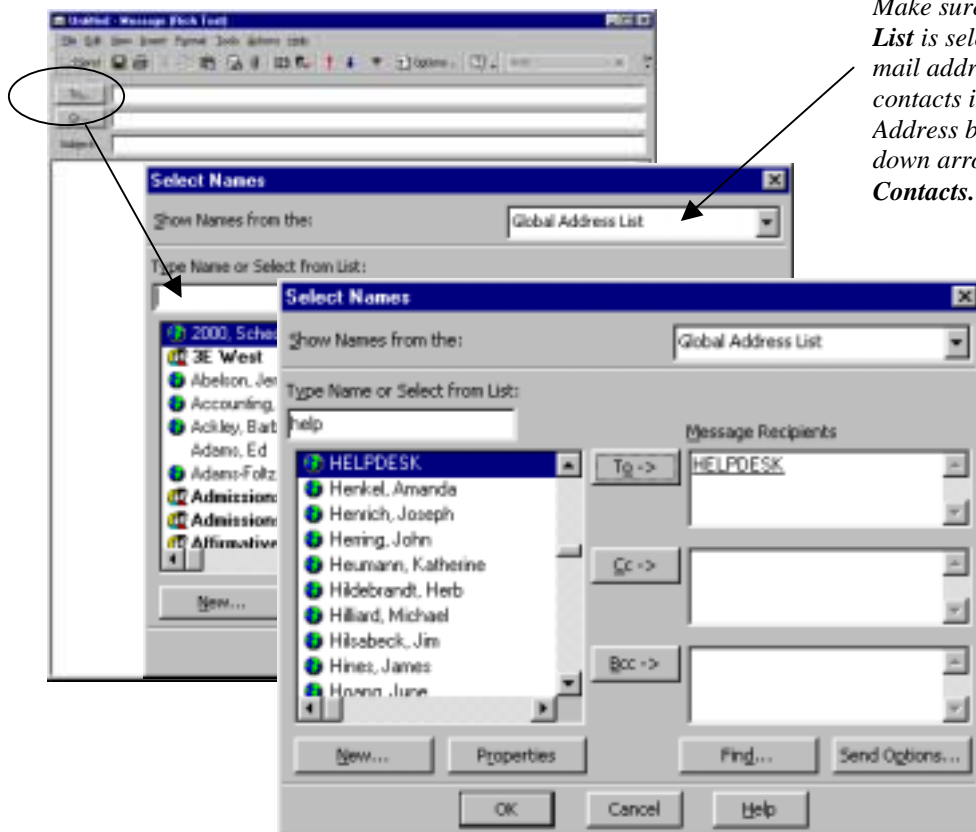
In the To:... field, type in a complete Internet address (janedoe@aol.com, etc.) to send to someone outside of the Business School.

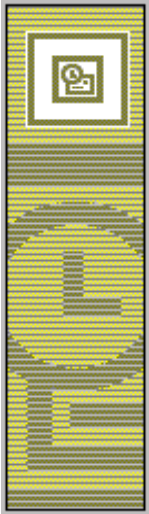
Separate multiple recipients with semi-colons (;).

To send to another Business School Exchange user, you can either

** Type their name in the field (in the format first name space last name with correct spelling to match their Exchange name) - if this name is recognized as an Exchange user or one of your personal contact entries, Outlook will convert it to the Exchange user format Lastname, Firstname or give you an unrecognized address message when you try to send the message.*


** Click on the To button to choose from a list of names and mailing lists.*

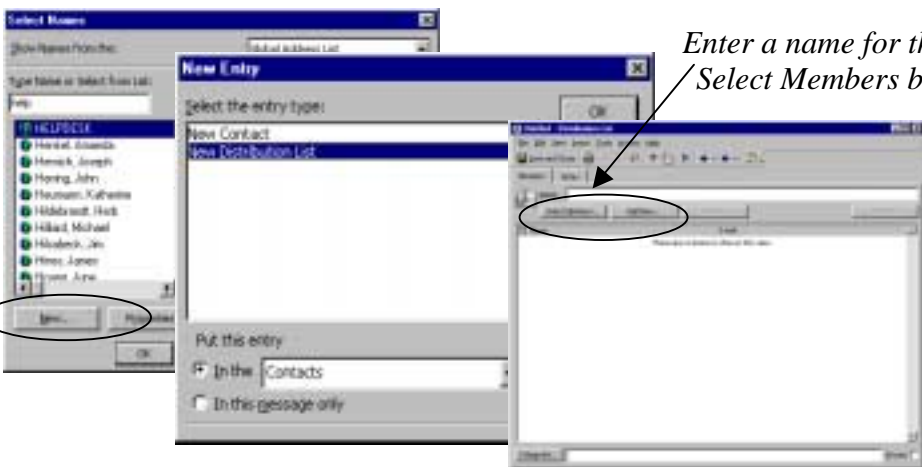




Begin typing the name of the mailing list, account or the **LAST NAME** of the person, and the selection will jump alphabetically in the list to the letters you enter. When the name you want is selected, move their name into the To box on the right by pressing the To -> button, pressing the Enter key, or double clicking on the name. The list will remain open for you to select other names.

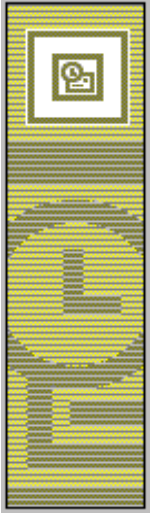
Global Address List versus Contacts List: When you click on the To button, the Global Address List appears by default. This lists all of the Exchange users and mailing lists at the Business School. Your personal e-mail addresses are listed under the Contacts list. This can be selected from the Drop Down arrow in the top box. You can switch back and forth between the two lists to select names.

 **Create Your Own Distribution Lists:** In Outlook it is easy to create your own private group mailing lists. After Clicking the To button to address a message, click on the New button, choose New Distribution List then click on the OK button.



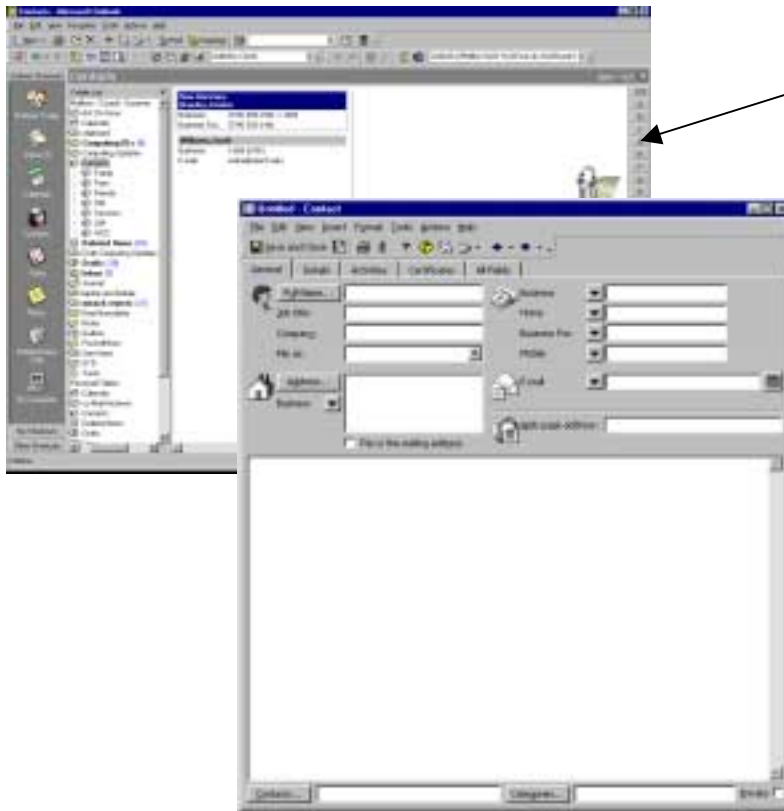
Enter a name for the list, then click on the Select Members button to choose names from the Global Address List and your Contacts, or click the Add New button to add a complete e-mail address that is not in either the Global Address List or a contact.

Once you have created a list, it is stored as a Contact by its name. You can later add and remove names by opening it in Outlook's Contact mode (see the next section). When addressing a message, you can use this group list by selecting it just as you would any other contact.



Adding and Viewing Contacts

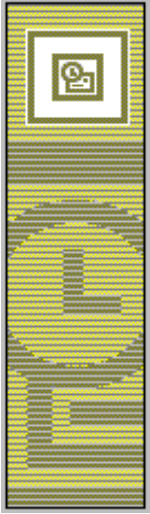
To store e-mail addresses that are not part of the Global Address Book, you will want to create "contacts." Click on Contacts on the Outlook bar and press Ctrl + N, or choose the New button on the Standard Toolbar, or choose File - New - Contact. Fill in the form with the e-mail address and contact information.



Note the alphabetical tabs to quickly jump through your contacts as your list grows.

These contacts can be easily viewed at a glance. Double click on any contact to view or add more information. Choose File Print for different options to print them out in various styles, such as a phone list, as cards, as a booklet, etc.

To automatically add an e-mail address from a message, you can drag a message from the Inbox into contacts to create a new contact, or right click on the From field in a message with an internet address to create a new contact, but you may need to clean up the record a little.



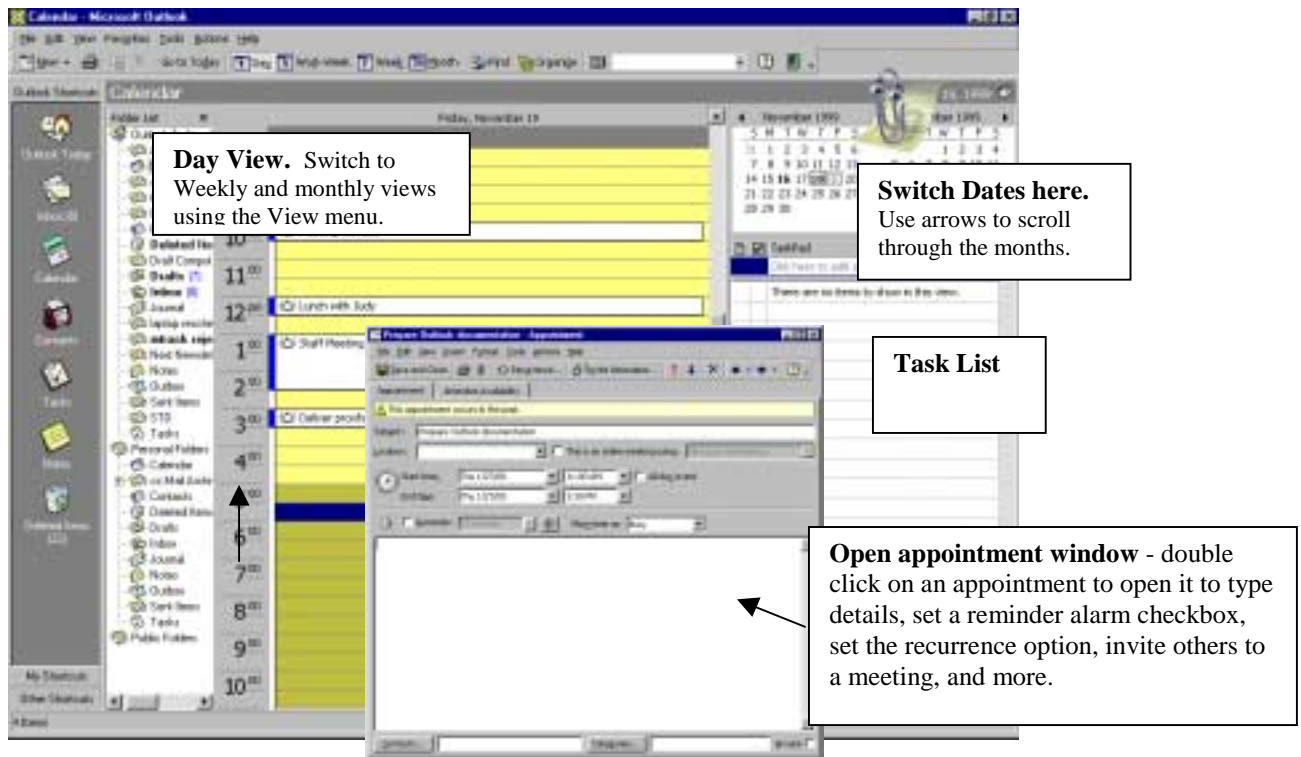
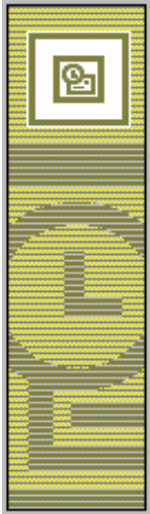
You can also drag a contact onto your Inbox icon to begin a new message automatically addressed to that person.

Please Note: You do not need to create an e-mail address contact record for anyone in the Business School - everyone is listed in the Global Address Book. Contacts are best used for your personal e-mail addresses.

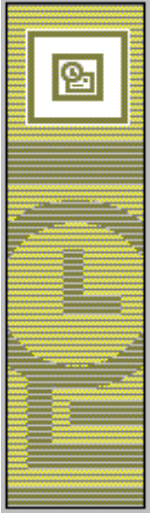
While in Contacts, you can create new folders and drag your contact records into these folders for organization.

***Use a Palm Pilot?** Please note if you plan to sync with a Palm Pilot, your Palm address book entries will be added as Contacts, but Outlook's Contact sub-folders will not sync with your Palm Pilot.*

Using Outlook's Calendar

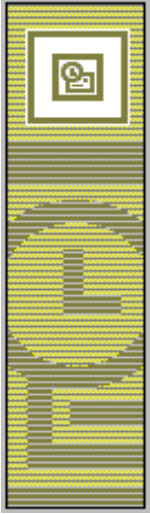


- **Click on a time slot**, or drag to select a block of time, then type in text to create an "Appointment." Double click on the entry to open it and set details.
- **To enter recurring appointments**, open the appointment and click on the Recurrence button, then choose the desired options. If you later need to modify a meeting that reoccurs, it will ask you if you wish to apply the change to all occurrences in the series, or only the one being modified.
- **To set a reminder "alarm,"** open the appointment and check the Reminder box. Use the drop down arrow to choose the time. Uncheck the box to turn it off. By default this box is checked automatically. For Reminder options, go to Tools – Options – Other and click on the General - Advanced Options button, then click on the Reminder Options button.
- **To invite others**, click on the Invite Others button. This changes the "appointment" icon to a "meeting" icon and adds a "To" field to the form. You can then enter their e-mail address to mail them an invitation, and view their schedule for planning on the Attendee Availability tab. This uses the Global Address List to access the free and busy times of Business



School Exchange users. Enter the names exactly as you would address and e-mail to them. See the following section.

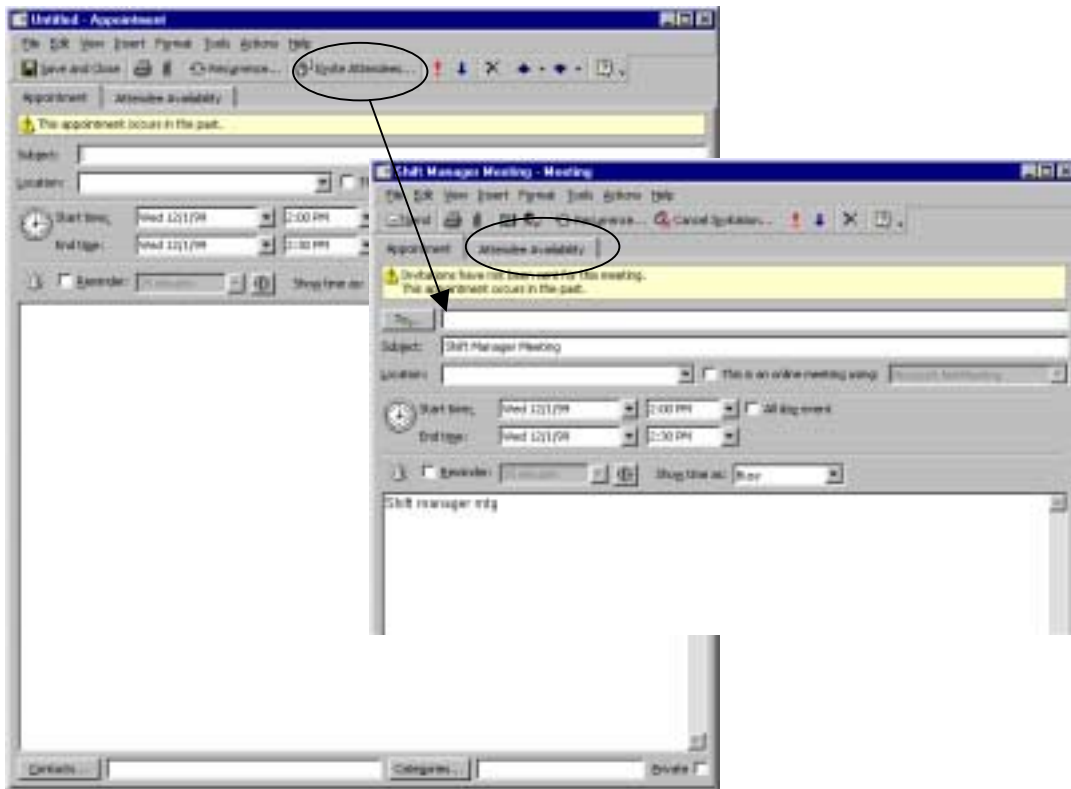
- ***To delete a calendar entry**, Right click on the appointment then choose Delete, or select it and press Ctrl + D, or choose Edit - Delete. Be sure you have the appointment select and are not in Editing mode – click on the border to select the appointment.*
- ***To change calendar views**, use the View menu or click on the small monthly calendar in the upper left corner.*
- ***To Print A Copy Of Your Calendar**, in Calendar mode, go to File - Print. Under Print Style, choose the desired layout.*



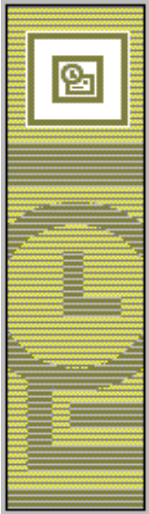
Inviting Others to a Meeting

*Outlook allows you to create a calendar event, select the e-mail addresses of those you wish to invite, view their calendars to determine the best time, then automatically e-mail them an invitation and tentatively place the event on **THEIR** calendar! When they receive your e-mail invitation, their invitation message will have buttons to decline or accept. When they click on these buttons, it will automatically e-mail you back their response, with the option to edit the reply to personalize it. As the meeting coordinator, you can quickly get a summary of who will attend. Following are details:*

In Calendar mode, click on the New button on the toolbar, or double click on an event already on your calendar. Click on the Invite Attendees button and a To field will appear in which you can enter E-mail addresses.



Once you have selected Exchange users in the To field, click on the Attendee Availability Tab to see the calendars of the other Exchange users invited.



You can add other names to the list simply by typing in their name on each line and pressing the Tab key. (Alternatively, you can begin with this method and enter all names this way.)

Their calendars will display, with scheduled and open times. Observe the best time to schedule the meeting. Click on the desired time then drag the borders to select the desired time slot. This will automatically update the meeting date\time and your calendar entry.

Meeting Time. To change, click another time on the calendar, or enter in box at bottom. You can also drag the meeting borders to adjust duration.

External User (can't see schedule.)

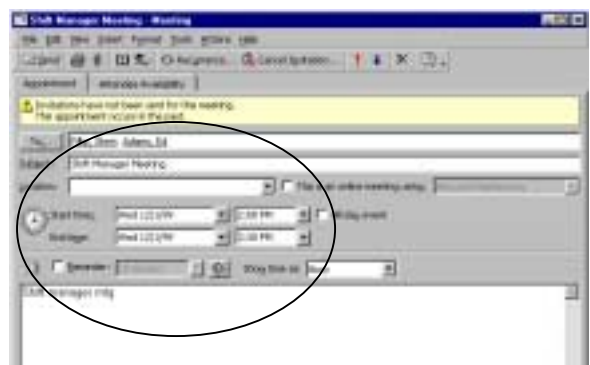
Enter additional participant names in blank line then press Tab.

Please Note: You can see why it is important that everyone use their Outlook calendar and why it is important to keep your calendar entries current. Co-workers may be planning around your calendar, and invite you at a time they think you're free when you are actually busy! Please use your Outlook calendar and keep it up to date!

If you are inviting someone that is not a Business School Exchange user, they will receive your message invitation, but you will not be able to view their calendar and it will not place it on their calendar. Their schedule will appear with a barred line.

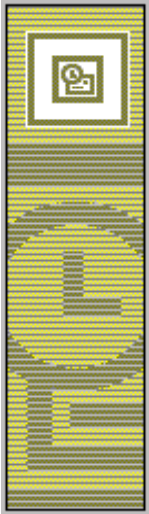
Return to the Appointment tab. Note the meeting date and time.

Be sure to enter a subject, and a clear location (i.e. "Dean's Office, D1248" is clear, while "My Office" may be confusing). Note there is also room to enter text for an agenda, etc.



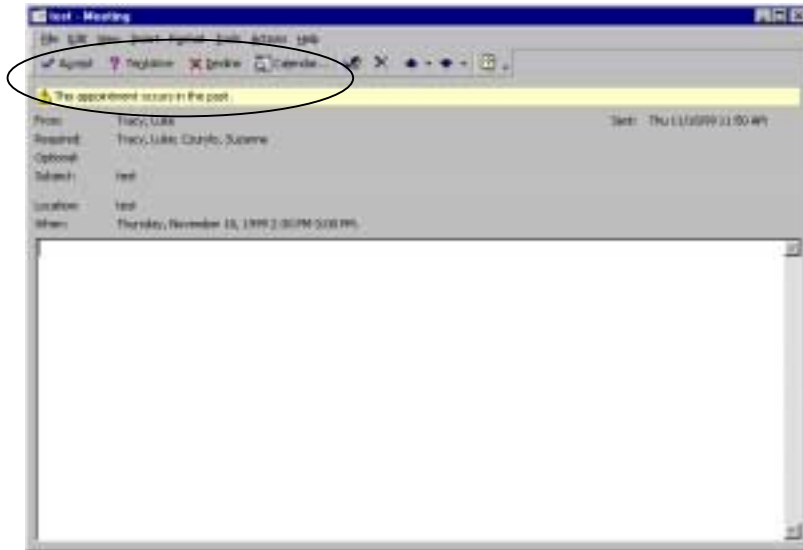
Click Send when you are ready, and wait for their individual e-mail responses.

To quickly see a summary of responses, double click on the meeting appointment on your calendar to open it, then click on the Attendee Availability tab for a list. (Note only the original person who sent the invitations can see this list).



Responding to a Meeting Invitation

Individuals invited to a meeting will receive a message. The invitation message will look like this:



Please Note: You cannot see the Accept, Tentative and Decline buttons in the Preview Pane. You must double click on the message to open it in order to see and respond with the invitation buttons.

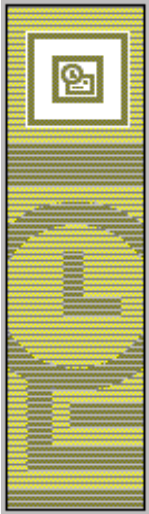
You can tell a message in your inbox is a meeting invitation if you look carefully at the identifying icon - meeting invitations have the meeting icon (a profile of multiple people) next to the envelope icon.



Click on the button to automatically send a response. You will be prompted to edit the response, in which you can personalize the response with text, etc.

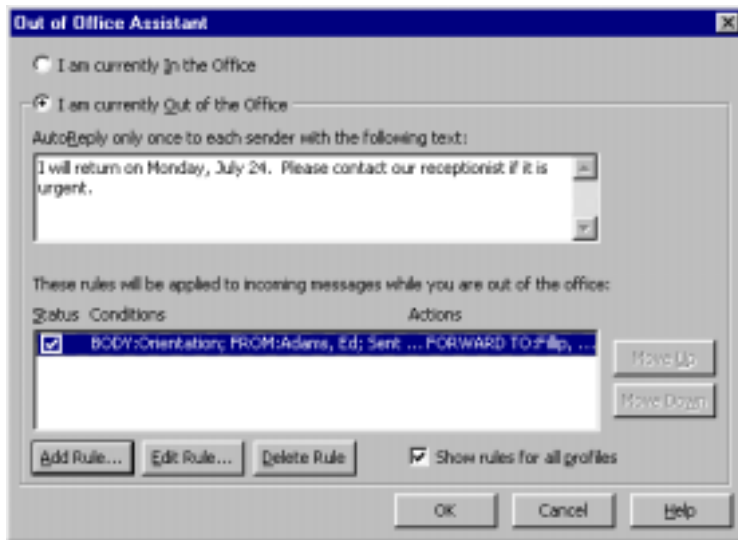


Please note: There is a check box setting to “Delete Meeting Request from Inbox when Responding” in Tools – Options – Email Preferences – E-Mail Options - Advanced E-Mail Options. This is personal preference, but if you later can't find your meeting request in your inbox, this is why!



Setting Up Out of Office Messages:

It is easy to set up an auto-reply message to notify people when you are out of the office. Go to Tools - Out of Office Assistant and click on "I am currently Out of the Office" to turn it on. In the AutoReply field, type in the your reply that will be sent automatically to all incoming messages while the Office Assistant is turned on.

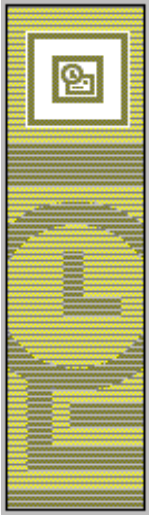


For those comfortable with Rules or wishing to experiment with more options, click on the Add Rules button to create rules based on various criteria to perform different actions and responses. A check mark in the status column means the rule is currently in effect, remove the check mark to turn it off.



Please Note: These rules work only when the Out of Office Assistant is turned on and active.

To create and manage regular daily rules, use the Organizer button on Outlook's Standard Toolbar instead of Out of Office rules.



Accessing Outlook Over the Web:

Use this:

- ✓ From Anywhere Outside the B-School (home, travel, campus, etc.)
- ✓ From a co-worker's computer within the B-School
- ✓ To easily access another Outlook account you have rights to open

Finally! Remote access of e-mail is easy. From any computer in the world connected to the internet with a relatively new browser, go to:

<http://webmail.bus.umich.edu>

You will need to log in with your unickname and press Enter. You will then be prompted to log into the Exchange Webuser Server - enter your unickname and NT password (this password is the same as your Novell password that you use to log into your office computer.) Sorry, but both logins are required.

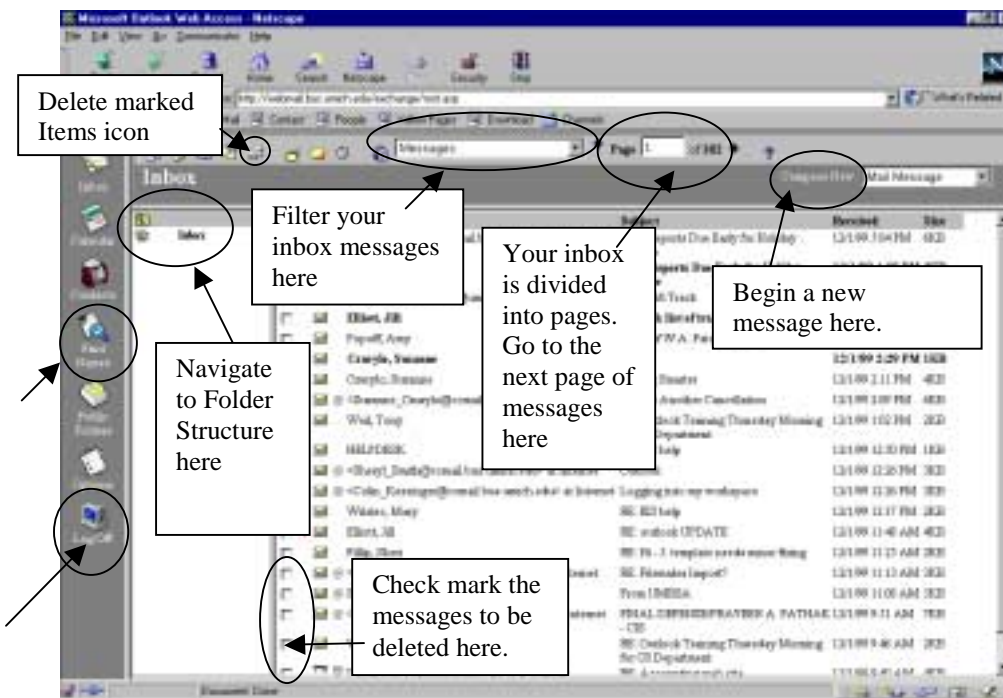
You will be greeted with a familiar site - your inbox!

A Few Important Differences:

Logging Out: Be sure to click on the *Log Off* Icon on the left when you are finished. Simply closing your browser or ending your internet connection will not properly release your session from the web server, causing slower service for everyone.

To delete messages, you need to first checkmark them, and then click on the *Delete Marked Items* icon on the toolbar. Note they do not go to your Deleted Items folder, but are permanently deleted.

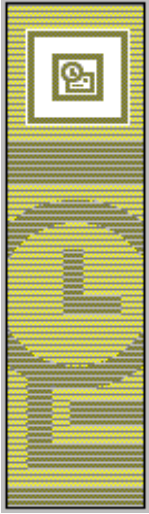
Your Inbox messages are divided into "pages."



Search for Names in the Business school Global Address Book here

Click the Log Off button when finished to free your server connection. Closing your browser without clicking this button may slow down the system for others.

Keep in mind, however, that the Web version works a little differently than the full version of Outlook, and there will be some tasks you can't do easily over the web, like move messages between folders. However, for simply checking your e-mail, reading, replying, sending and forwarding messages, as well as checking your calendar, it works great.



Finding E-Mail Addresses in the Web Version:

The Global Address Book works a little differently here - you will need to click on the Find Names button and enter a name to search for - anyone in the Exchange Global Address Book will be there, with a link to send them an e-mail. Unfortunately, there is not a way to access your personal address book from the Web version, but you can access your contacts via the web to obtain e-mail addresses that you enter manually.

Name	Phone	Alias	Department	Office
Adams, Ed		e-adams		

Click on the Find Names button on the Outlook Bar,

Enter in the First and Last name of the person you wish to address, then click on "Find."

The search results appear below - double click on the name for details and a link to "Send Mail To" them. This will open a new message addressed to them.

Details for: Adams, Ed

Name: Ed Adams
Alias: e-adams
Display Name: Adams, Ed
Title:
Office:
Company:
State:

Send Mail To

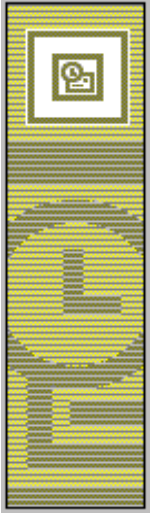
Email Addresses

- [CCMAIL:Adams, Ed at ...]
- [ccmail:Ed Adams]
- [ccmail:Ed Adams at UM]
- [smtp:EdAdams@bus.umich.edu]
- [SMTP:e-adams@umich.edu]
- [X400:c=US,a=p=Units]
- [c590:c=University of M]

Want to Use a POP/IMAP E-Mail Client?

Your outgoing server name is
smtp.itd.umich.edu.

Your incoming server name is
***.facstaff.bus.umich.edu**
where * is the first letter of your unickname.



Getting Help:

- *Remember Outlook's On-Line Help.*
- *If you suspect a technical problem, please contact the Helpdesk at 615-3000.*
- *If you would like assistance in using Outlook's features, please contact Suzanne Czurylo at 763-1501.*