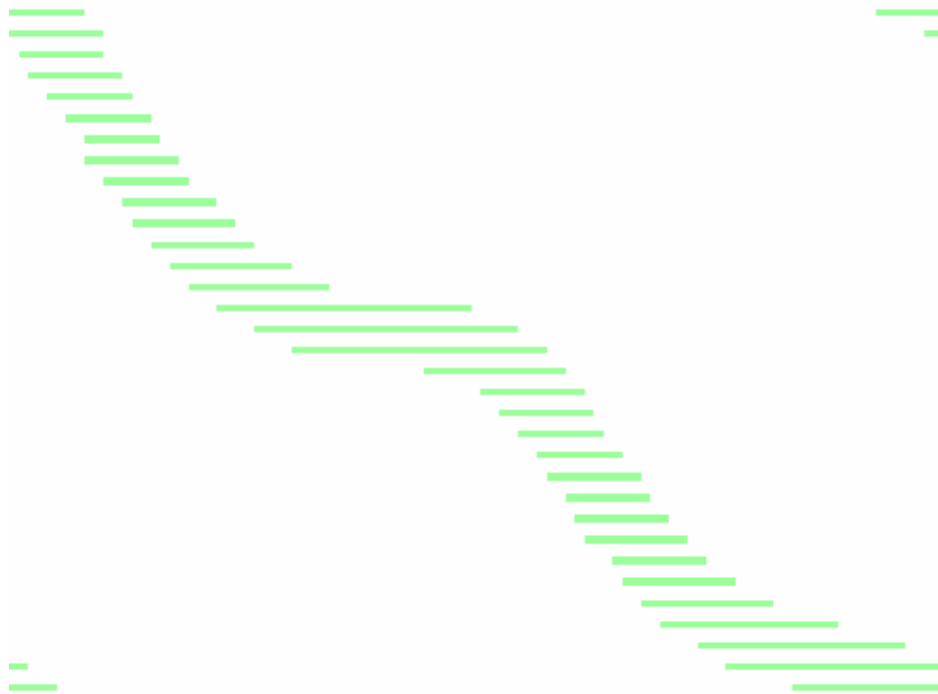


ITS - Training



Getting Started with Outlook 2003

Information Technology Services - Training

The University of Texas at Austin

<http://www.utexas.edu/its/training>

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Information Technology Services

The University of Texas at Austin

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What is Microsoft Outlook?

Microsoft Outlook 2003 is a groupware application that supports e-mail, scheduling, contacts, “to-do” lists, and other features. In contrast, Microsoft Outlook Express is the free Internet mail and news program that comes with Internet Explorer. Microsoft Outlook is a full groupware program that works with Microsoft Exchange servers.

This handout covers the basic features of Outlook that you are likely to be using at UT Austin. Comprehensive help on Outlook’s features are discussed in on-line tutorials at **office.microsoft.com**→**Products**→ **Outlook 2003 Help**

Follow the links.

What is the MS Exchange Server?

Microsoft Exchange is integrated server software that manages electronic mail, shared documents, and calendars. Although Microsoft Outlook does not require a Microsoft Exchange server, Outlook offers more functionality when used in conjunction with a Microsoft Exchange server. The Exchange server that is owned by Information Technology Services is called the Austin Exchange Messaging Service or AEMS.

You can activate an ITS Austin Exchange Mail Service account by validating your ITS personal computer account for service at <http://www.utexas.edu/its/account>. You can then configure your Exchange mailbox on the Windows Enterprise Support - Austin Account Management Page. <https://www.austin.utexas.edu/austintools/logon.aspx>

Your department can set up ITS Exchange Services for you and assign you an e-mail address and set mailbox limits by going to the ITS TRAC pages <https://utdirect.utexas.edu/its/account/department/>. There, information specifying account numbers as well as the assigned e-mail address will have to be provided. From that time on, billing is automated and does not require advance approval, but rather works on the model of *TXShop. Further information can be obtained from the ITS Helpdesk at 475-9400.

If your department or college runs an Exchange server that you wish to subscribe to, please contact the corresponding Help Desk or Information Technology Support Group.

Configuring Outlook

Setting Up An Outlook 2003 Profile on Austin Exchange Servers

Please go to the ITS Windows Enterprise Services webpage for Outlook 2003 at <http://www.utexas.edu/its/messaging/outlook03.html> and read the document titled “**Setting Up Outlook 2003 to Access AEMS E-mail and Calendar.**” This is the most up-to-date information on setting up Outlook at UT Austin.

Connecting to the Exchange server from Off-campus

Normally, you must use UT VPN to connect to the Exchange server from off-campus using Outlook in order to send and receive e-mail from UT Austin systems. Installing and using this product generally will clear up most connection problems with UT Austin servers from most Internet Service Providers (ISP). You can, however, configure proxy server information to connect via HTTP rather than TCP/IP to the Exchange server, provided that your ISP does not restrict connections via secure HTTP connections. Further information, including information on configuring Proxy server information so that Outlook can be used off-campus with Exchange (without having to use Cisco’s UT VPN product) can be found at <http://www.utexas.edu/its/messaging/get-started.html>. The processes are similar for Outlook XP and Outlook 2003. There are instructions for each version of Outlook.

Setting Up UT Austin LDAP Directory Information in Outlook

To get to all e-mail addresses in the University, you will need to configure Outlook to be able to access the UT Austin LDAP directory. Please go to the web page at <http://www.utexas.edu/its/messaging> and implement the instructions listed in the document, [Adding the UT Directory to Your Outlook Address Book](#). Outlook logins must completely time-out before the changes will be implemented to the **Address Book** to allow you to get to directory.utexas.edu addresses. One way to do this is to reboot your system, or implement this change before leaving for the day.

The Microsoft Outlook “Interface”

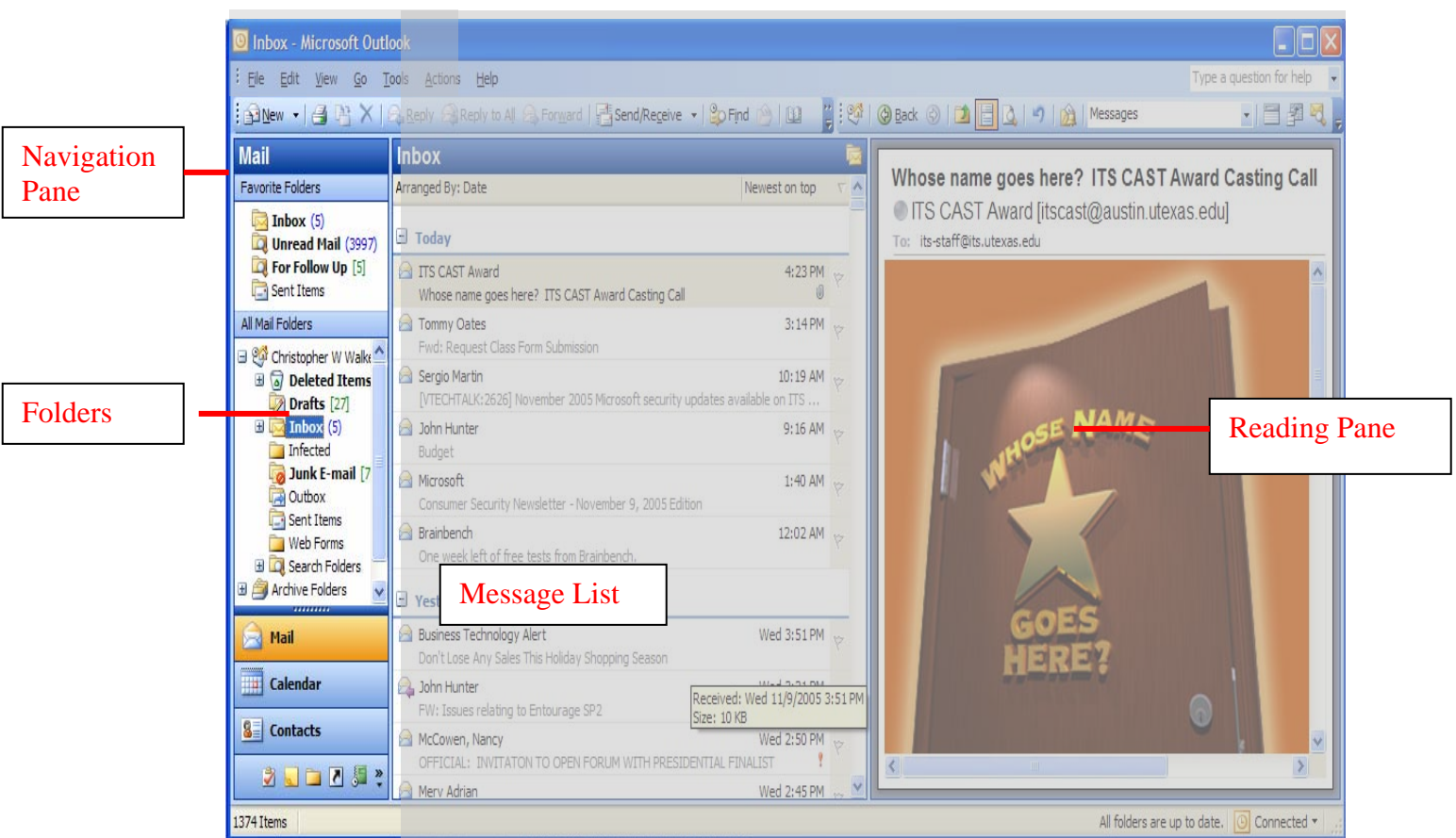


Figure: Microsoft Outlook 2003 interface

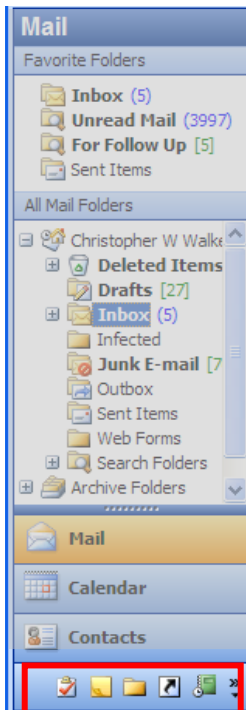
Main Window and Reading Panes

The title of the folder you are currently viewing is displayed in its own title bar. In the example below, the title of the open folder is Inbox. The main window is divided with folder item headers in the left half and a preview of the selected item displayed in

the right half. You can choose where the reading pane will display by using the **View** menu. Under **View** choose **Reading Pane** then **Right**, **Bottom**, or **Off**.

Navigation Pane

The navigation pane appears on the left side of your Outlook window and allows you to navigate to any folder or service within Outlook. Folders are expanded by clicking the plus sign to the left of the folder name and are collapsed by clicking the minus sign. To view the contents of a folder click once on the folder name itself.



The icons at the bottom of the Navigation Pane help you navigate to the most commonly used Outlook services. You can view them as large icons with text labels, or as small graphic icons. To shrink the icons into small graphics simply drag the horizontal separation bar between the folder list and the icons downward.

Separation Bar

Figure: Navigation Pane

Message List

The message list displays information from the e-mail message headers and can be sorted in many different ways. To sort by a field other than date, for instance, click the **Arrange by** drop down list and choose how you would like the messages to be sorted. You can also specify whether the messages should be sorted in ascending or descending order using the drop down menu to the right of the **Arrange by** menu, as well as display messages in groups.

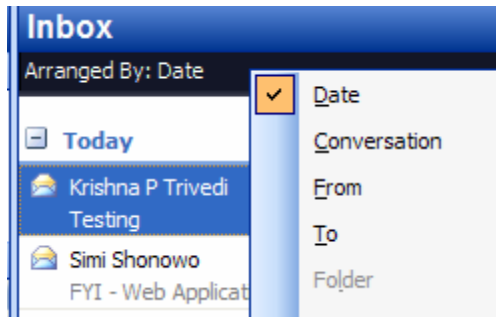


Figure: Sorting Messages

To delete a message using the **Message List** click once on the message to select it then click the delete button from the toolbar. You can also delete a message from the **Message List** by selecting the message and pressing the Delete key on your keyboard. Once you have deleted a message it will be moved to your **Deleted Items** folder on your e-mail server. To permanently delete a message you must also delete it from your **Deleted Items** folder.

Reading Pane

To view a message in the **Reading Pane** click once on the message in the **Message List**. To open a message in a new window, double-click on the message in the **Message List**.

Sending & Receiving Mail

To send a message in Microsoft Outlook, choose **New** from the **File** menu and select **Mail Message** or choose **Mail Message** from the **New** drop down list in the toolbar.

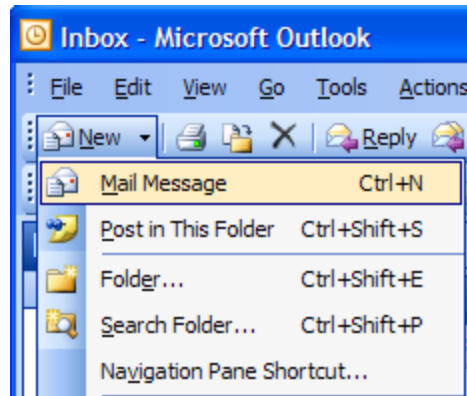


Figure: Creating a New Mail Message

In the New Message window, type the e-mail address of the recipient, a subject for your message, and the text of your message. You can also format text, i.e., in HTML, but note that if the recipient is not using Outlook, your formatting may not display properly. When you are ready to send the message, click the **Send** button on the toolbar.

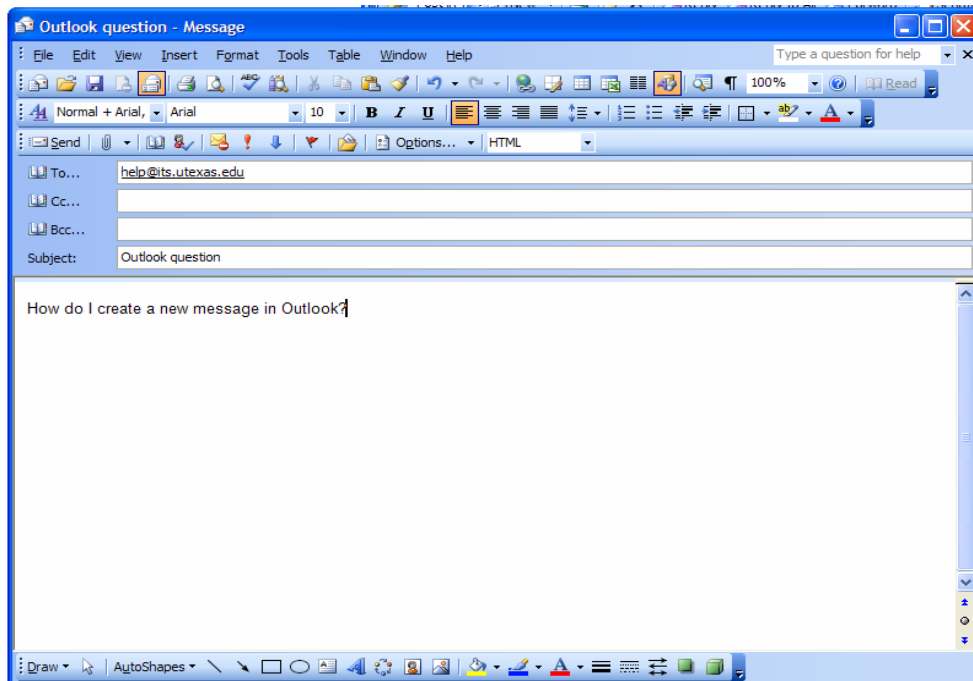


Figure: New Message Window

Attaching Files

To attach a file to a message choose **Insert** and **File** or click the paper clip icon in the toolbar. Then select the file you want to attach. Outlook attaches the document to the message. If you receive a message with an attachment, an icon appears near the header

information at the top of the email. Double-click the attachment icon to view the attachment.

Sometimes attachments created with different programs and different mail systems are not easy to read. If you have difficulty reading an attachment, send a message to the sender and request the attachment in a specific format. A good format for word processing files is HTML or RTF.

Reading Mail

To check your messages, click the Inbox icon in the **Navigation Pane**. Clicking once on the header in the header pane will display the message in the **Reading Pane**. Double-clicking the message header will open the message in a separate window.

Replying to and Forwarding Messages

To reply to a message, select the message in the header pane and click the **Reply** button on the toolbar. The **Reply to All** button sends your reply to everyone who received the original message. Use this feature only if you want everyone to see your response. Outlook also has a **Forward** button on the toolbar to forward a message to another e-mail address.

Mail Delivery Options (Signatures and Tracking)

Microsoft Outlook has several useful Mail Delivery Options that are not available with regular Internet mail. For example, you can attach a signature to all messages by default, or you can request to receive notification when your recipient has read the message or schedule delivery of the message. These options require the Microsoft Exchange server. Click the **Options** button on the toolbar top access these features. This document will cover E-mail Signatures and Tracking.

E-mail Signatures

E-mail signatures are easy to configure in Outlook. From the options menu, select **Signatures**.

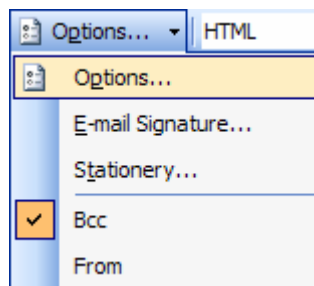


Figure: Activating Blind Carbon Copy from New Message Window

The E-mail signature dialogue allows you to enter in the actual signature, and specify which signature applies to new messages as well as replies to messages.

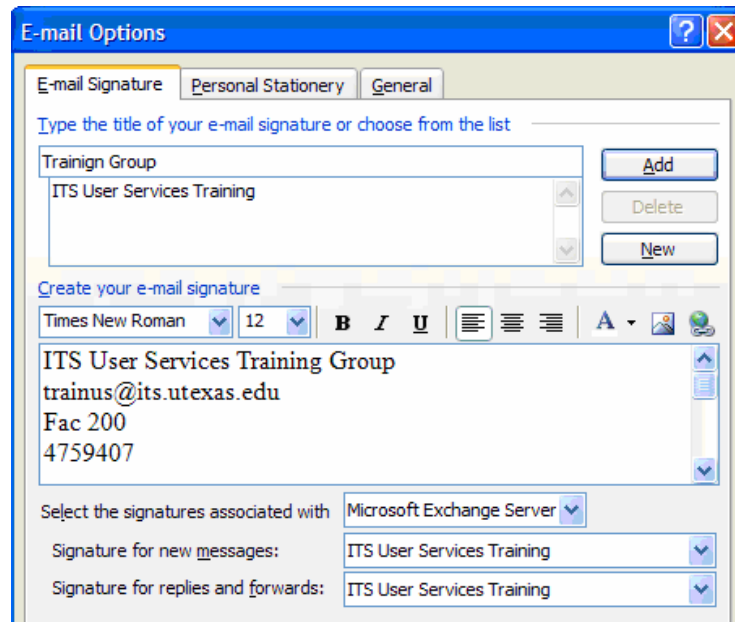


Figure: Signatures in Outlook 2003

While you may implement any number of mail signatures, only the signature configured in this dialogue to be automatically included with messages will be conveniently accessible.

Provisions for manually signing messages in **Outlook** are limited if you use **Word** as your e-mail editor. If using **Outlook** as your e-mail editor, signatures will appear on the **Insert** menu when composing messages. Refer to **Outlook Help** to get more information on using and implementing signatures in **Outlook**.

Address Book

Outlook has multiple Address books. The **Contacts** list stores your own list of addresses and distribution lists that will be maintained on the server. The **Global Address** list contains all users and distribution lists on your Exchange server. The **LDAP** directory, *directory.utexas.edu*, provides access to all members of the UT Austin community who choose to share their e-mail addresses.

Adding Entries to your Contacts list

To add or edit entries in your Contacts list, click on the **Contacts** icon in the **Navigation Pane**.



Figure: Contacts Icon

In the Contacts window, click the **New** icon on the toolbar to enter a new contact.

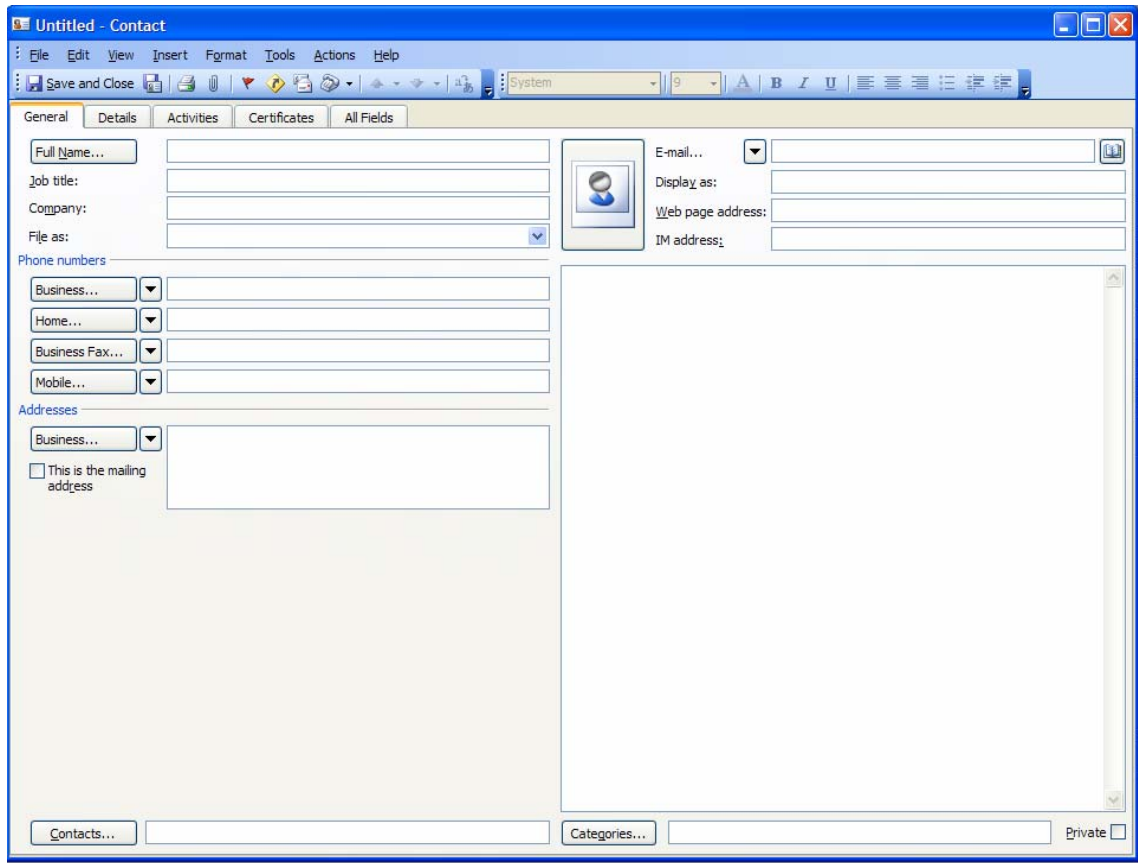


Figure: Contact Entry Window

Sending Mail Using Contacts List

When you want to send mail to a user in your Contacts List, click the **To:** button while composing the mail to display your contacts. If you do not see your contacts listed, choose **Contacts** from the pull down menu. To send to someone from the Global Address List generated by the Exchange server, click the **To:** button and select **Global Address List** from the drop down menu.

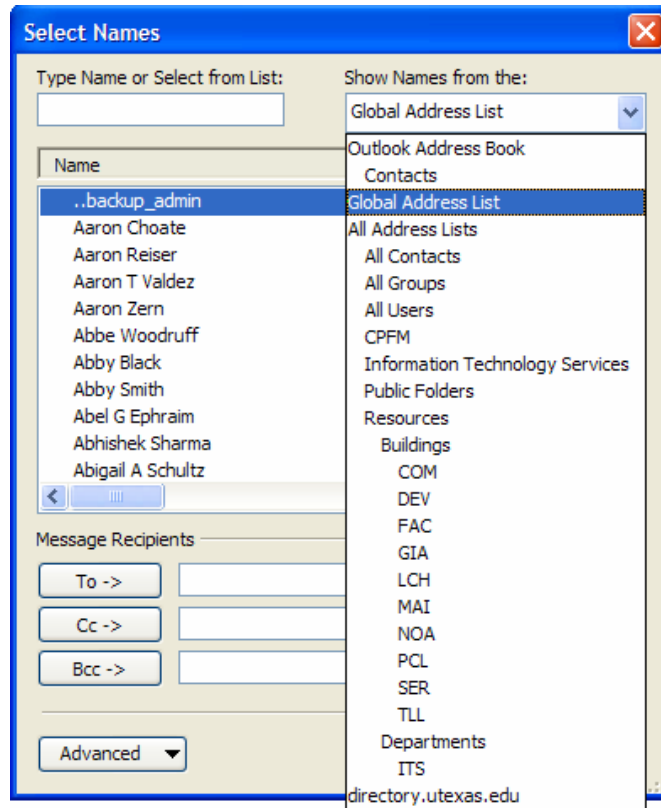


Figure: Selecting Global Address List as Source of Email Addresses

You can add multiple recipients by clicking once on the recipient name in the list, then clicking on the To, CC, or BCC buttons.

Changing Search Order Of Your Address Book

In Outlook, under Tools→Address Book→Tools→Options, you have the ability to determine which address list comes first. Knowing which list comes first is important if you communicate with people who belong to other workgroups who might not be Exchange subscribers. There are many duplicate names at UT Austin and it is always good to know from which list your e-mail addresses come from.

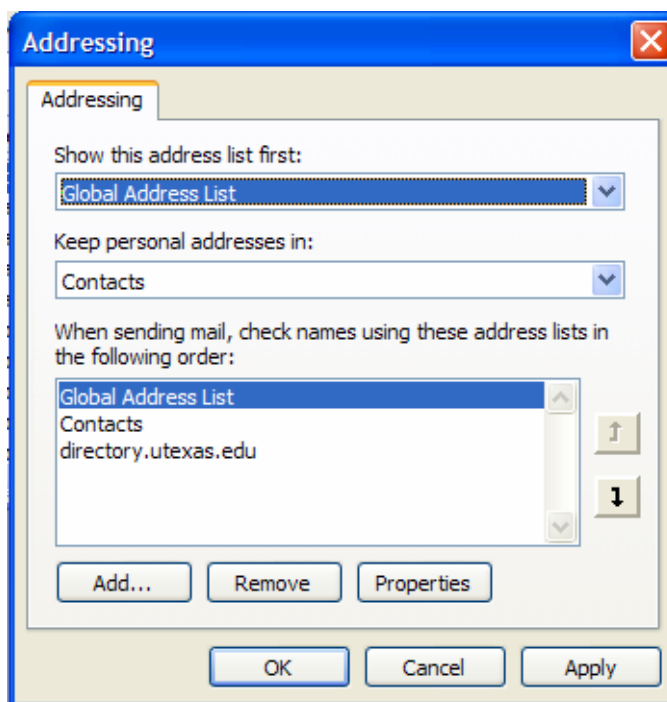


Figure: Changing Address Book Search Order

Managing E-mail

As you receive more messages, you will want to manage your e-mail more efficiently. Microsoft Outlook has many ways to help you organize your mail.

Sorting and Finding Messages

When you have hundreds of messages in your Inbox, it's not always easy to locate the message you want. Outlook has Sort and Find features to help.

To change how the messages are sorted **Right Click** the **Arranged by** bar just below the title bar that displays the current folder name in the header pane.

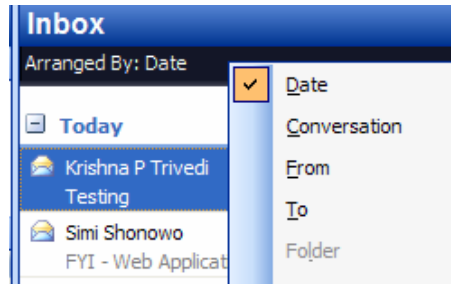


Figure: Sorting Messages by Date

You can also group messages by the selected category or categories, if you check the **Show in Groups** checkbox, your messages will be separated by group labels.

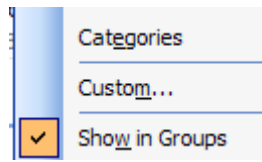


Figure: Sorting Messages by Group

If sorting doesn't help, you can search for text in a message. Click the **Find** button on the toolbar to display the Find toolbar. Enter the text you want to find in the dialog box and select the folders to be searched. Outlook will search for your text and display a list of messages that meet the criteria in the header pane.



Figure: Finding Messages Using Find Button

Deleting Messages

To delete a message, select the message in the header pane and press the Delete key on your keyboard or click on the delete tool (the X) on the toolbar. Outlook transfers the message to the Deleted Items folder. To retrieve a message from Deleted Items, open that folder, select the message and choose **Edit, Move To Folder** and select the folder to move it to. To permanently delete a message, select the message and press Shift + Delete on your keyboard.

You can also right-click on messages in the top pane to display a list of commands like **Print**, **Delete**, **Reply**, **Move To**, and others or “drag and drop” the message from its current location to the desired destination folder.

To permanently remove the contents of the Deleted Items folders on a regular basis, do the following:

1. Right Click on **Deleted Items** and select **Properties**.
2. Select the **AutoArchive** tab and select **Archive This Folder Using These Settings**. Then select **Permanently delete old items**.
3. Then, set the interval at which items are deleted by setting the value at **Clean out items older than...** The default is 2 months.

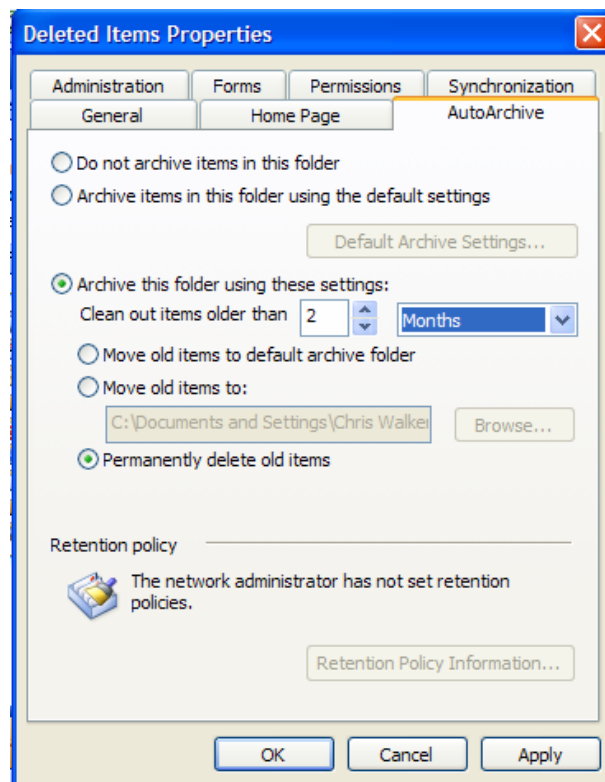


Figure: Using Autoarchive to Automatically Remove Deleted Messages

Archiving Messages

The process of archiving messages can be accomplished in two ways, through manual archiving or through auto archiving.

To archive messages manually, select **File→Archive**. You can select archiving all messages under all folders according to the **AutoArchive Settings**, or archive specific

folders. These messages are normally selected by date. Further control requires using **AutoArchive settings**.

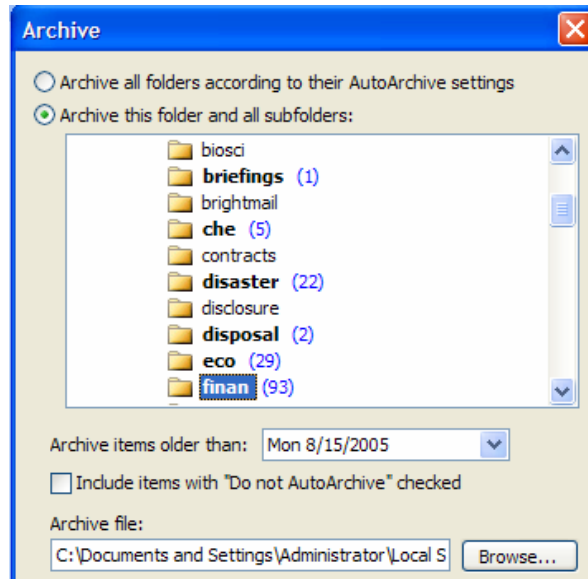


Figure: Archiving Messages

The folder in which messages will be archived is set up in **File→Data File Management**. You can change this value to be anything you want it to be. Files created through Outlook archiving tend to be large, so take care that message archives do not exceed the size of common backup media, such as Flash drives, CD Roms, Portable Hard drives or DVDs

To set up automatic Archiving, **AutoArchive** settings have to be activated for all Outlook folders on the Exchange server or specific folders. Access these settings by left-clicking on the desired folder, right click Properties, and select the AutoArchive Settings Tab:

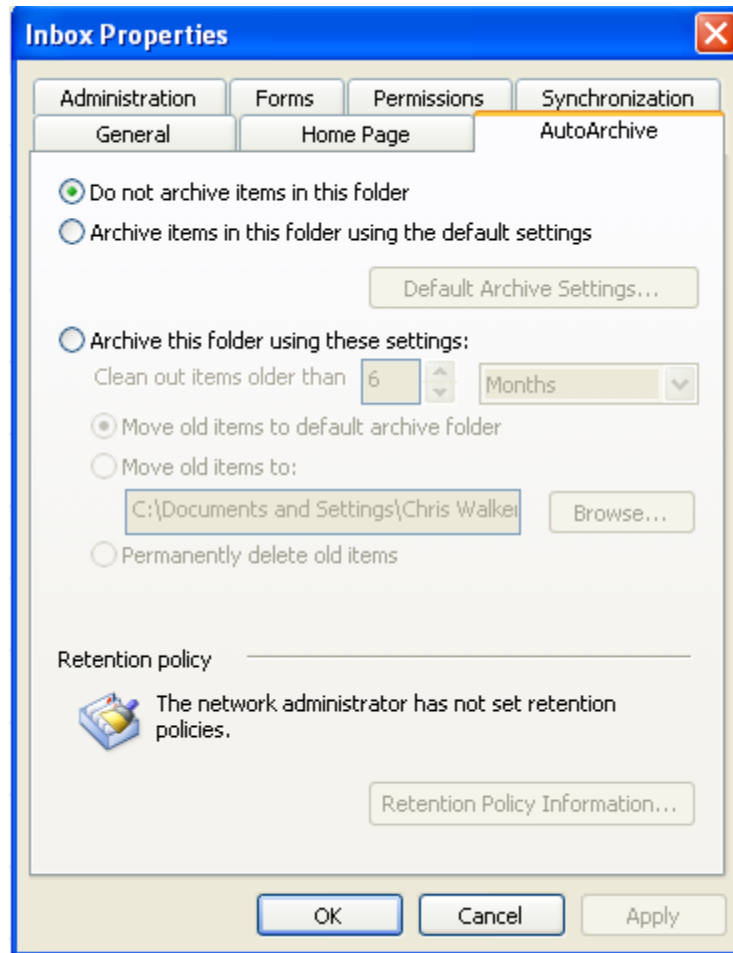


Figure: AutoArchive Settings Tab

The **AutoArchive** tab enables you to remove messages that are older than a specific time interval—days, months, etc.—and then to determine how to dispose of them. A system on Active Directory can have automatic retention policies set, or you can set default auto-archive settings for all messages. Take care about the size of the archive folder. Often, it is better to manually archive messages over a specific time period, such as a fiscal year, rather than doing so automatically.

Further tutorials on archiving messages are available at the Microsoft Office help site at office.microsoft.com→**Outlook**→**2003 Assistance**.

Folders

Use folders to help organize the messages you receive. For example, you can transfer all correspondence with your parents into a folder called **Personal**.

1. To create a new folder in your **Inbox**, choose **File New** and then select **New Folder**.

2. Type a name for the folder in the dialog box, and select the type of information the folder will contain. Finally, select the destination for the folder in the dialog box and click OK. (To create the folder in your **Inbox**, click on the **Inbox**.)

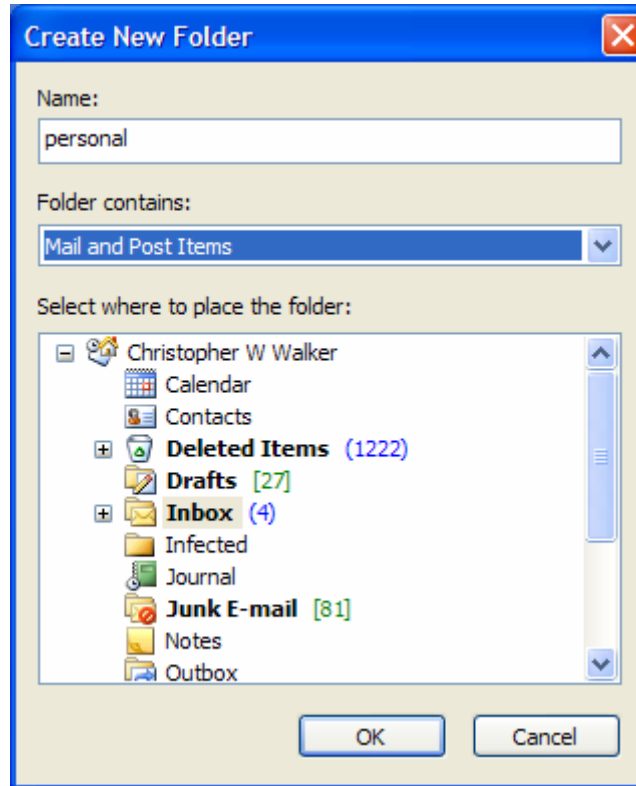


Figure: Creating a New Folder For Saving Messages

3. To move a message to another folder, select the message and choose **Edit** and **Move to Folder** or **Copy to Folder** if you want to copy the message to another folder. To simply move the message, you can also drag it from the header pane to the appropriate folder in the Navigation pane.
4. You can also set up a **Message Rule** to automatically move messages to your new mail folder.

Message “Rules” and Filters

In Outlook you can create “rules” that filter your mail. For example, you might want to automatically transfer all messages from your friend in College Station, Joe Billionaire, to a folder called Personal, or automatically delete messages that have the phrase “get rich quick” anywhere in the message.

1. To create a mail filter, choose **Tools** and then select **Rules and Alerts**.

2. Click the **New Rule** button.
3. Select the type of rule you want to create. Then click the underlined words in the Rules Description section of the dialog box and fill in the required information. For example, the rule in the example below moves all messages from Joe User to the folder called **Finances**. (**finan** in the illustration)

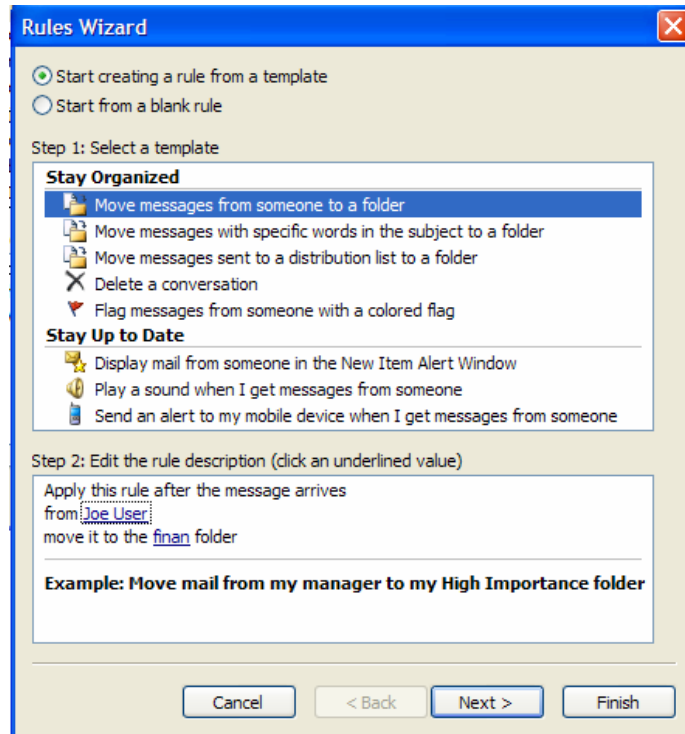


Figure: Message Rules for Automatically Handling Messages

4. To run the rule anytime you want, including when the rule's behavior or criteria are modified, select the rule you want to run and select **Run Rules Now**. You can run rules on all folders, or you can select a specific folder run the rules again.

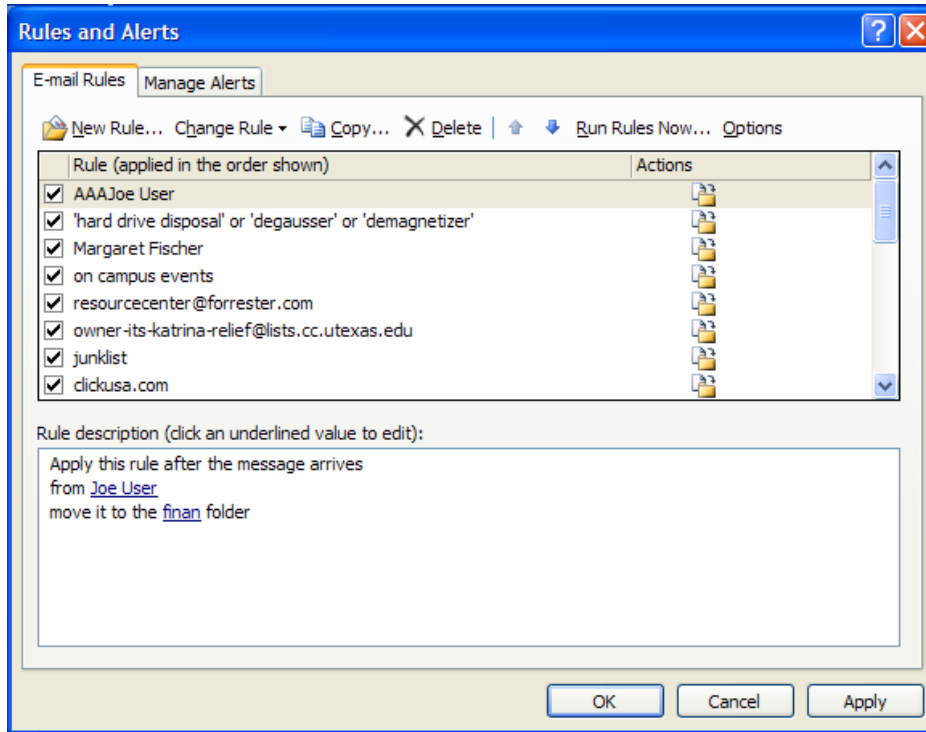


Figure: Typical Email Rule Names and Details of Sample Rule

Calendars and Scheduling

Microsoft Outlook is a sophisticated personal and group scheduling program. Click the Calendar button in the Navigation Pane to use the scheduling feature of Outlook. Outlook's Calendar appears in the figure below.

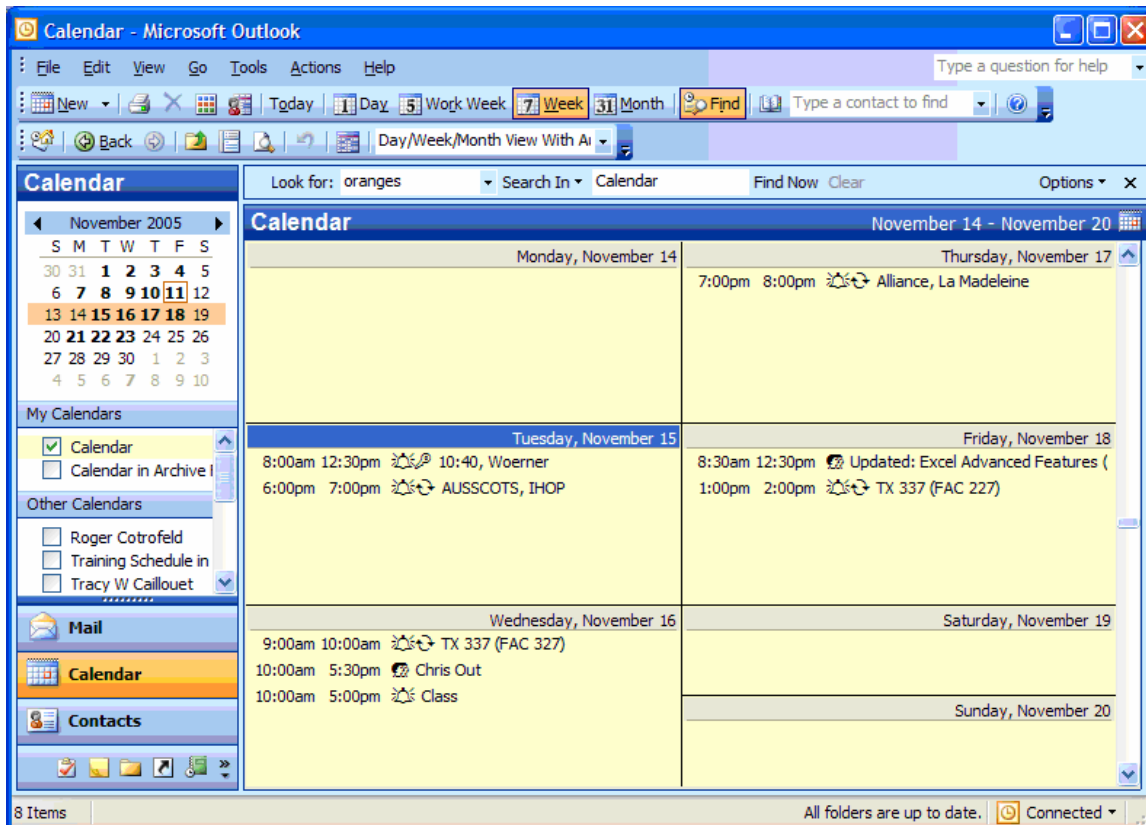


Figure: Outlook Calendar on Exchange

To schedule a new appointment:

1. Choose **File New** and select **Appointment** or click the **New** button in the toolbar and choose **Appointment**.
2. Enter information about the time, date, and location of the appointment.
3. If your meeting is recurring, click the **Recurrence** button to specify the details of how often and when the meetings Recurs.

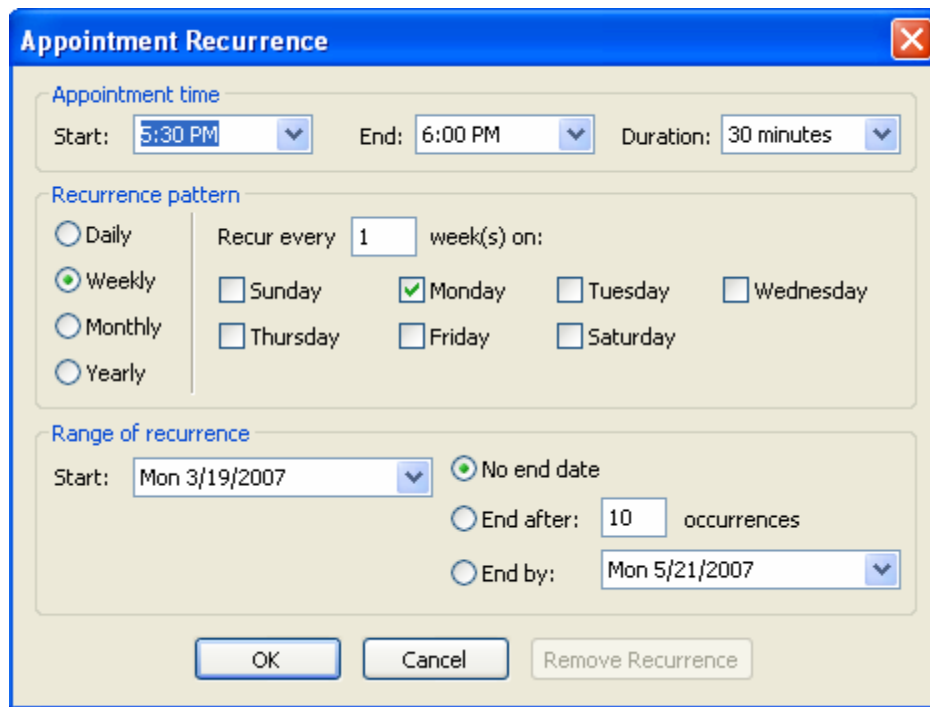


Figure: Meeting Recurrence

4. Click **Save and Close** to schedule the meeting. It will now appear on your Outlook calendar.

Scheduling Meetings and Rooms

Outlook can also be used to schedule meetings with other users on your Exchange Server.

To schedule a meeting with multiple people:

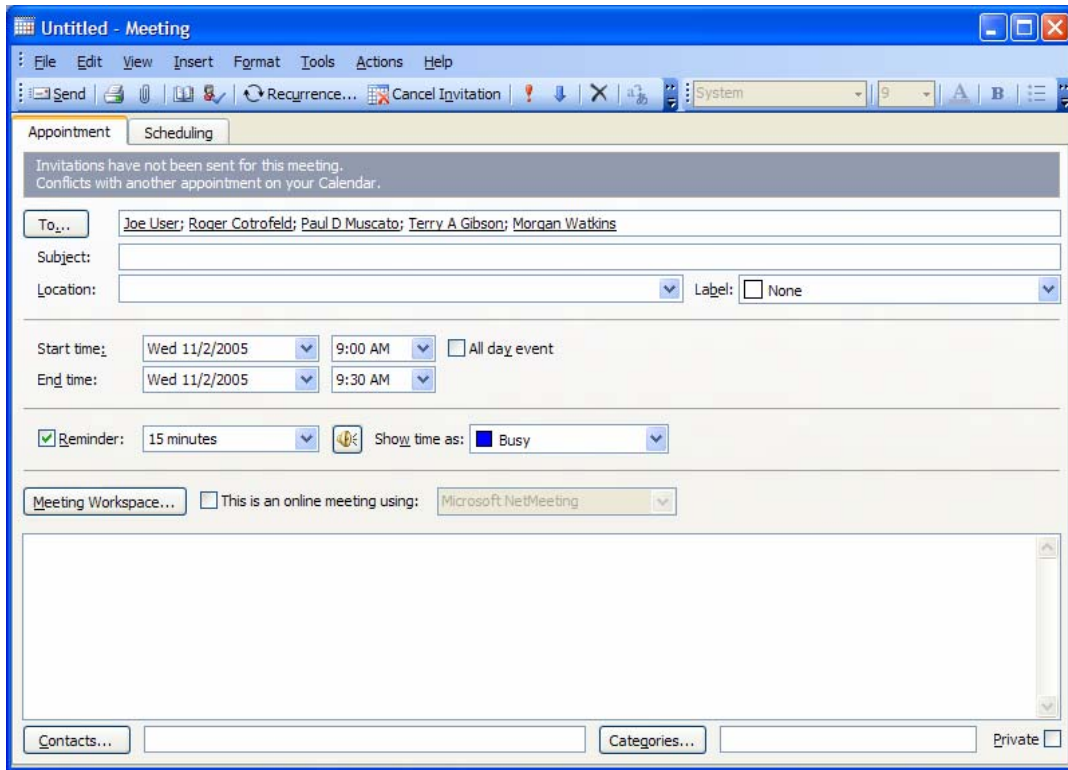
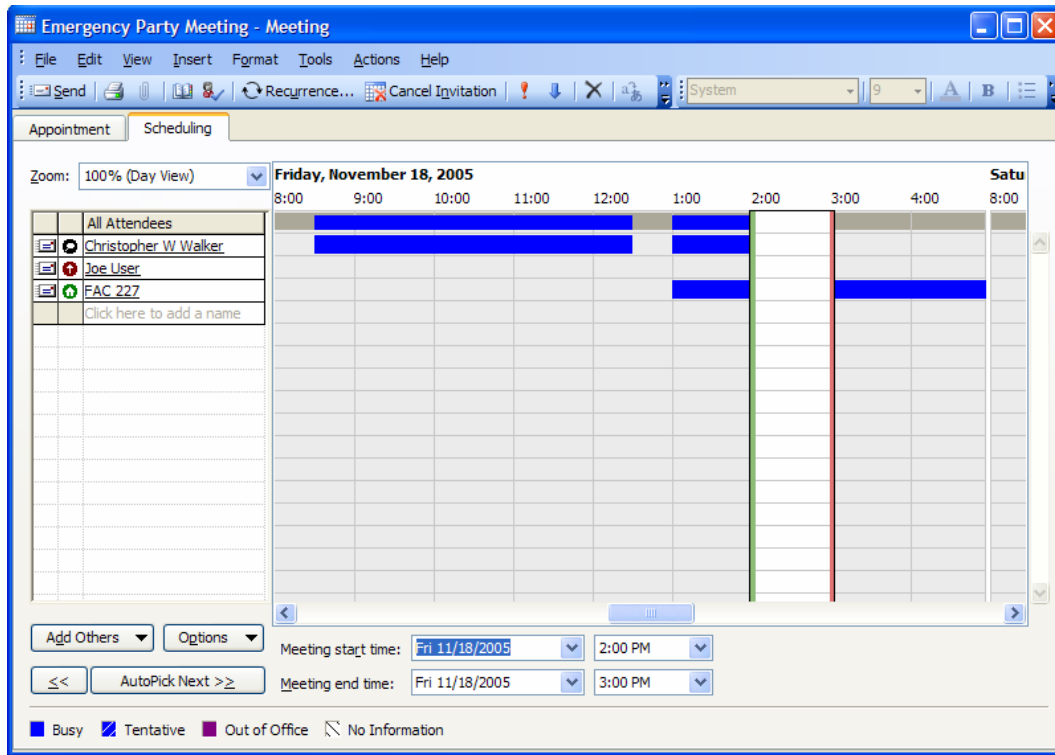


Figure: Example of A Meeting With Multiple Attendees

1. Select **File New** and choose **Meeting Request** or select **Meeting Request** from the **New** button drop down list.
2. Click the **To:** button to select the people you need to attend the meeting.
3. Specify a Subject, Location, Date and Time. If your meeting attendees also use your Exchange server, you can check their availability by clicking the **Scheduling** tab. It will display the free and busy times of the other meeting attendees. You can even have Outlook select the first date and time that all parties are available by choosing **AutoPick**. If you select a **Resource**, its schedule can also be taken into consideration when setting up a meeting with a group of people.
4. To automatically be added to the schedule for the resource, i.e., a room, you have to have the ability to **Create items** for that resource, which the owner can grant as a **permission** or **delegate**. Otherwise, the resource owner as well as all participants must accept the proposed meeting.



5. The meeting appointment is sent like an e-mail message. Attendees will be prompted to accept or decline and send automatic notification back to you. When they accept, the meeting will automatically be added to their own Outlook calendar. After creating the meeting, to mark it as Private, right click on the meeting and select **Private** off of the drop-down menu.

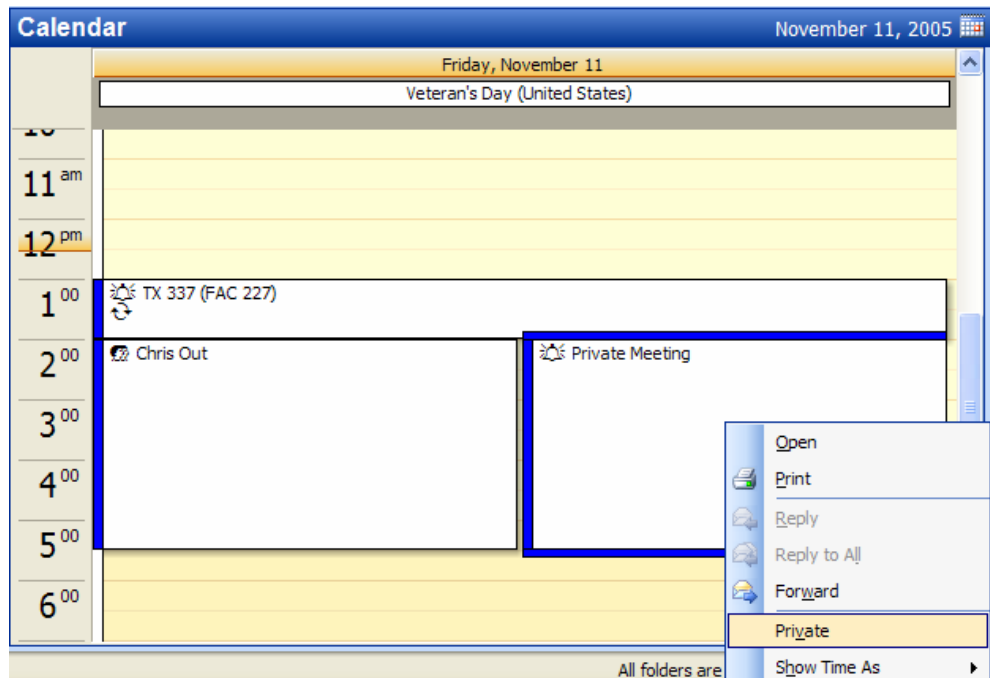


Figure: Sample Calendar Entry For A Single Day

Assigning Permissions/Delegates

You may want to allow other Exchange users to have access to some of your services in AEMS. Assigning delegates grants other users permission to do things like view your calendar, send e-mail messages on your behalf, and tasks to your to-do list, and more.

To add a delegate:

1. From the **Tools** menu choose **Options**, then click the **Delegates** tab.
2. Click the **Add** button and select the delegate from the Global Address List.
3. Click the **Add** button in the dialog box to add that person as a delegate.
4. Assign the appropriate permissions for each service and click OK.

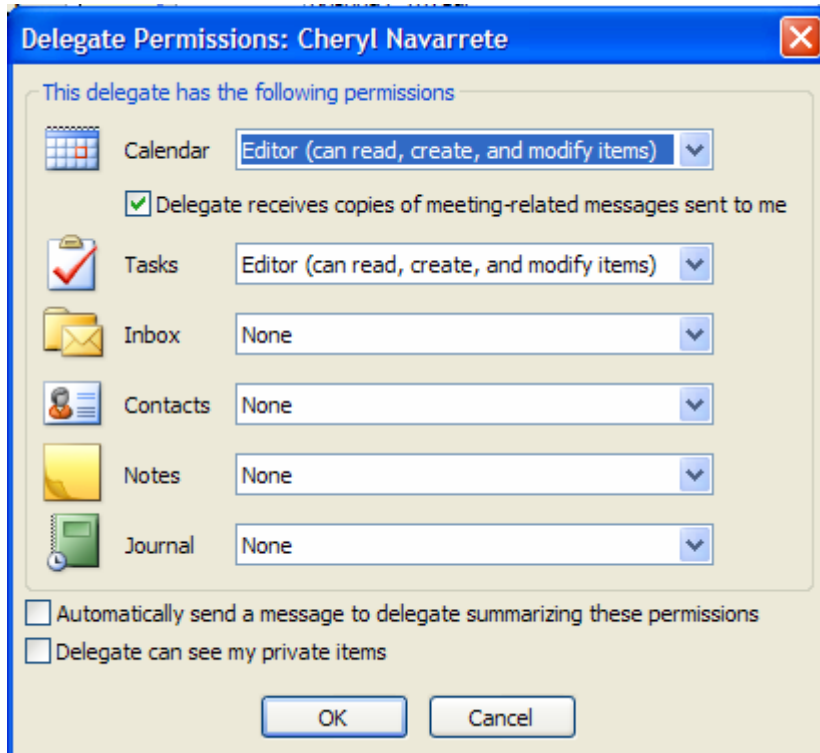


Figure: Sharing A Calendar

To share your calendar folder:

1. Click on the **Calendar** icon to switch to the **Calendar** view.
2. Right click on your calendar from the **Navigation Pane**
3. Click on the **Permissions** tab
4. Click on the **Add** button to locate the user from the Global Address list you want to add.
5. Click on the specific individual to update their permissions. You can also set default permissions for all users of the Exchange server.

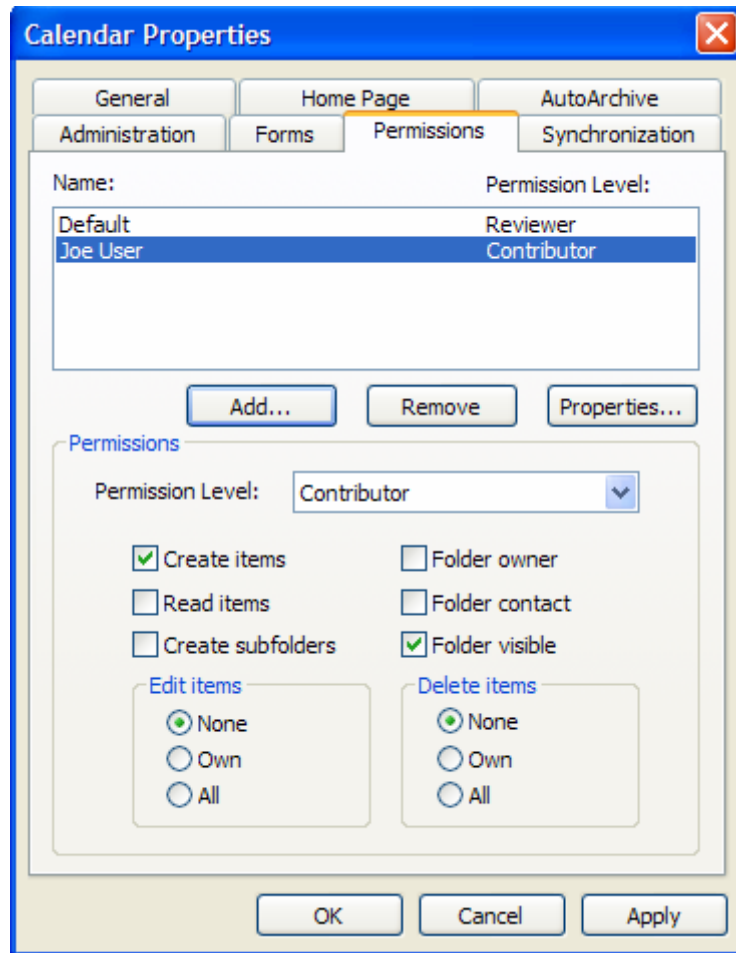


Figure: Calendar Permissions

To view someone else’s calendar/folder:

If another Exchange user has made you a delegate, or has shared one of his Exchange folders, such as his calendar, you can view it and may be allowed certain editing privileges.

1. From the **File** menu select **Open > Other User’s Folder**.

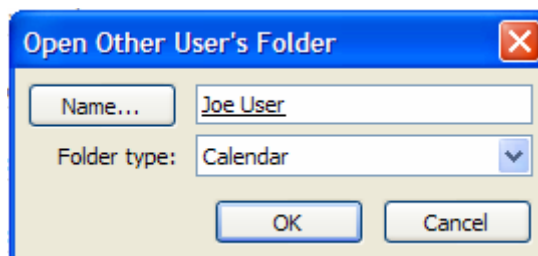


Figure: Looking At Someone Else’s Calendar

2. Click the **Name** button to locate the user from the Global Address List and click **OK**.

3. Select which folder you would like to view from the **Folder type:** field and click **OK**.

“To-Do” Tasks

You can create new tasks in Outlook while by choosing **Task** from the **New** button in the toolbar or by entering the task directly into the Task window. To view the **Task** window, click the **Tasks** button in the **Navigation** pane.

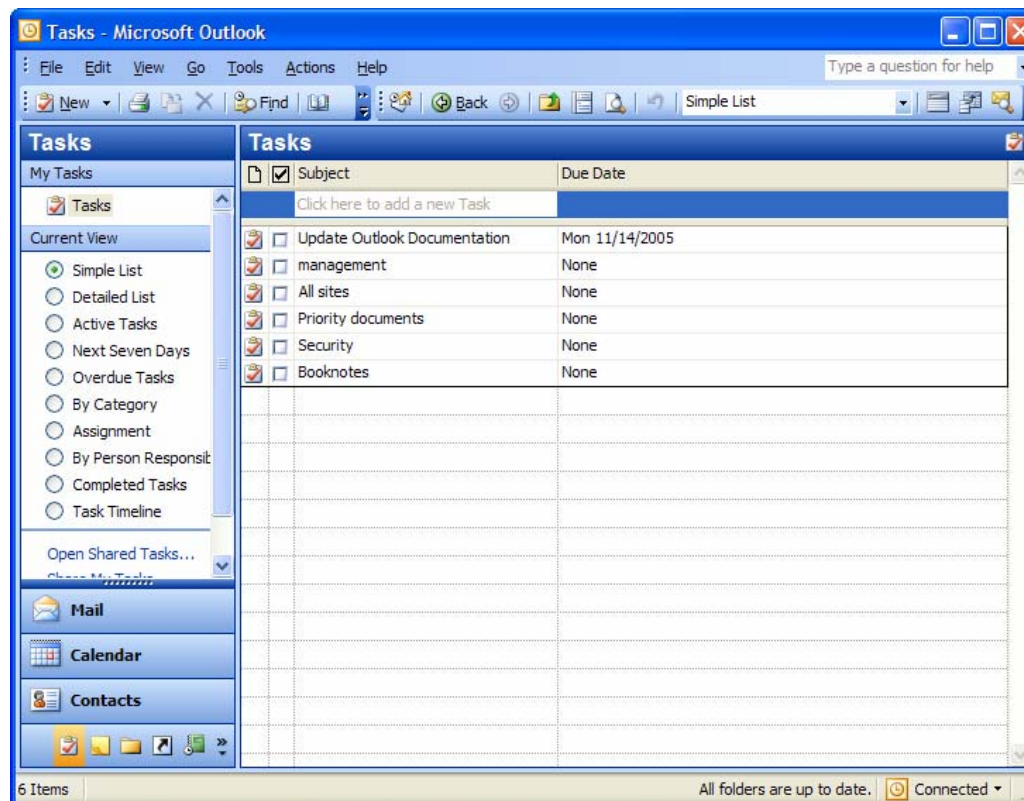


Figure: To Do/Task List In Outlook

To enter a new task from the **New > Task** button, enter the information for the subject, dates, status, and details. To assign the task to someone on the Exchange server, click the **Assign Task** button in the toolbar then click the **To:** button to find the recipient. The recipient will receive the task in his/her Inbox with all of the information you entered included.

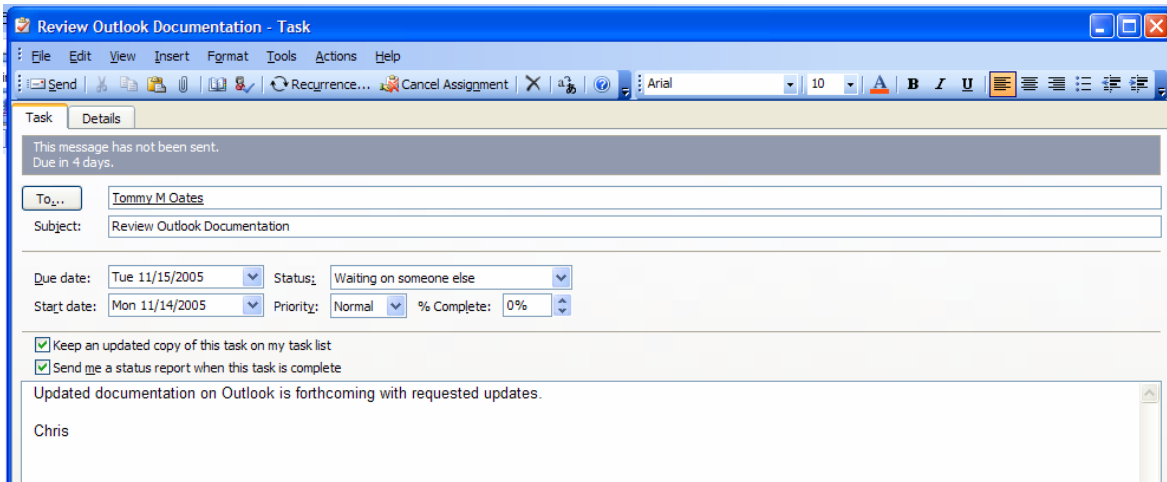


Figure: Entering In A Task

To enter a task from the **Task** window, simply click in the next empty row and begin typing. When you press Enter, the task is added to your To-Do list. Tasks are kept in the Tasks folder and are also displayed in your Outlook Today view for the week ahead.

Tasks can also be made recurring, which will then enable Outlook to pop up a reminder on a regular basis, such as when a weekly report is due. A recurring task can be assigned to other people too. In the **Task** window, click on **Recurrence**, and fill in the appropriate checkbox, including the **End Date** of the **Task Recurrence**.

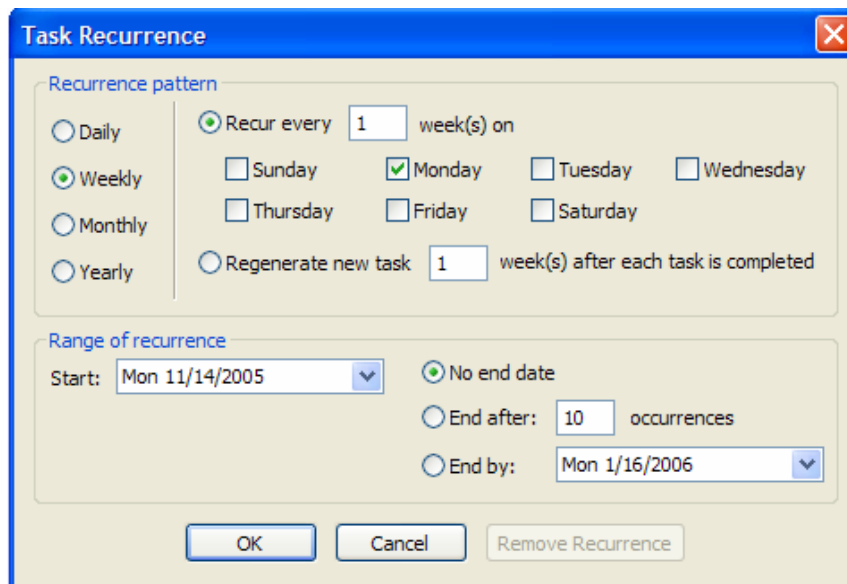


Figure: Task Recurrence

Other Cool Features

Notes & Journal Entries

Like appointments and tasks, you can create “sticky” notes and/or journal entries which can be saved for yourself and/or sent to others on the Exchange Server.

Public Folders

Public folders which can be viewed and shared by others on the Exchange Server can be created by the server administrator. To view a Public Folder click the folder list icon in the **Navigation** pane. Near the bottom of the list you will see **Public Folders** with a plus sign next to it. Click the plus sign to expand the necessary folders until you find the folder you are looking for.

Conclusion

Outlook is a flexible and dependable communications program that utilizes the services provided by Microsoft Exchange services to facility individual and group productivity.