

# Outlook 2000 Procedures Quick Reference

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## Sending an e-mail message

To create and send new e-mail message, do the following.

1. On the **File** menu, point to **New**, and then click **Mail Message**.
2. Enter recipient names in the *To*, *Cc*, and *Bcc* boxes.  
(To select recipient names from a list, click the **To**, **Cc**, or **Bcc** button.)
3. In the *Subject* box, type the subject of the message.
4. In the text box, type the message.
5. Click **Send**.

### *To*, *Cc*, and *Bcc* boxes



You can send a message to recipients by separating their e-mail names with semicolons ( ; ) in the *To*, *Cc*, and *Bcc* boxes.

- To** Message is sent directly to the recipient.
- Cc** Carbon Copy. A copy of the message is sent to the recipient, and the recipient's name is visible to other recipients of the message.
- Bcc** Blind Carbon Copy. A copy of the message is sent to the recipient, and the recipient's name is not visible to other recipients of the message.

### Marking a message as private, personal, or confidential

1. In the message you want to set the sensitivity level for, click **Options**.
2. In the Sensitivity box, click the option you want.  
Marking a message **Private** prevents the message from being modified after you send it.  
You can mark all of the messages you send with the same sensitivity level. On the **Tools** menu in the main window, click **Options**, click the **Preferences** tab, and then click **E-Mail Options**. Click **Advanced E-Mail Options**, and then in the **Set sensitivity** box, click the sensitivity level you want.


### Setting the importance level for a message

1. Create or open a message.
2. To mark a message as very important, click **Importance: High**  

- To mark a message as not important, click **Importance: Low**  


To remove the importance level symbol from the message, click the importance button again.

## Using the Address Book

The Outlook Address Book is the collection of address books you can use to store names, e-mail addresses, fax numbers, and distribution lists.

- The *Global Address List* contains all user, group, and distribution list e-mail addresses in your organization. The administrator creates and maintains this address book. The Global Address List may also contain public folder e-mail addresses.
- The *Personal Address Book* is a customizable address book best used to store personal distribution lists you frequently address messages to, such as a list of everyone in your workgroup or everyone involved in a specific project.
- The *Outlook Address Book* is automatically created from contacts in the **Contacts** folder. The contacts can be people inside and outside of your organization. When you update your contacts, the Outlook Address Book updates as well.
- To open the Address Book dialog box, click  or **Tools>Address Book**.


### Specify the address book to appear first

You can specify which address book is displayed first.

1. Click **Inbox**.
2. On the **Tools** menu, click **Services**, and then click the **Addressing** tab.
3. In the *Show this address list first* box, click the address book you want to appear first. (If you want a **Contacts** folder to appear first, you must select the **Contacts** folder name, not Outlook Address Book.)
4. Quit and restart Outlook.

### Creating a personal distribution list

You must have a Personal Address Book set up in your user profile to create a personal distribution list.

1. On the **Tools** menu, click **Address Book**.
2. Click **New Entry** .
3. In the *Select the entry type* box, click **Personal Distribution List**, and then click **OK**.
4. In the *Name* box, type a name for the group.
5. Click **Add/Remove members**.
6. Select the address book that contains the names you want to add to your personal distribution list.
7. In the *Type name or select from* list box, type each name you want to add. In the list below, double-click each name.

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## Delegating Access to Your Folders

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

A *delegate* is someone who has been granted permission to open another person's folders, create items, and respond to requests for the other person. The person granting permission to the delegate determines the folders the delegate can gain access to and to what extent the delegate can make changes.

As the person granting permission, you determine the level of access (permission) the delegate has. If you grant someone access to your folders, that delegate has access to the personal items in the folders. To give a person any level of delegate access means that person has send-on-behalf-of permissions.

A delegate can send messages on your behalf. If the delegate has access to your Inbox, the delegate can reply to your mail on your behalf. The delegate can also organize meetings on your behalf and respond to meeting requests sent to you. A delegate can also respond to task requests sent to you.

If you receive notification that you have been granted delegate access permission, you can open another person's Outlook folders. To do this, click the File menu, point to Open, and then click Other User's Folder.

### Delegate Access permissions

With any delegate access permission listed below, you have *send-on-behalf-of* permission. This means that, as a delegate, you can add the From box (in a new message, on the View menu) to e-mail messages, and then send the messages on your manager's behalf. Messages sent this way 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.

A delegate must have both editor permission in a manager's Calendar or Tasks folder and reviewer permission in the manager's Inbox to accept meeting or task requests for the manager.

If a manager selects the *Send meeting requests and responses only to my delegates, not to me* check box on the Delegates tab (on the Tools menu, click Options), then the delegate does not need reviewer permission in the manager's Inbox; the meeting requests and responses go directly to the delegate's Inbox.

### Permissions for delegates

<b>Author</b>	Read and create items, and modify and delete items you create. For example, a delegate can create task requests and meeting requests directly in the manager's Task or Calendar folder, and then send either item on the manager's behalf.
<b>Custom</b>	Perform activities defined by the manager.
<b>Editor</b>	Read and create items, and modify and delete any item. For example, a delegate can reply to messages, task requests, and meeting requests for the manager.
<b>None</b>	No permission. Cannot open the folder.
<b>Reviewer</b>	Read items only. For example, read messages in another person's Inbox.

### Setting sharing permissions for a delegate

1. On the **Tools** menu, click **Options**, and then click the **Delegates** tab.
2. Click **Add**.
3. In the *Type name or select from* list box, type the name of the delegate you want to set permissions for.
4. Click **Add**, and then click **OK**.
5. Select the permissions for each Outlook folder you want the delegate to have access to.
6. To send a message to notify the delegate of the delegate status and permissions you set, select the *Automatically send a message to delegate summarizing these permissions* check box.
  - If you want your delegate to be sent copies of your meeting requests and responses, give the delegate editor permission to your Calendar, and then select the *Delegate receives copies of meeting-related messages sent to me* check box.
  - To add multiple delegates simultaneously, select multiple names in the *Add Users* dialog box. The permissions you select will apply to all of the delegates.

### Change sharing permissions for a delegate

1. On the **Tools** menu, click **Options**, and then click the **Delegates** tab.
2. In the *Delegates* box, click the delegate you want to change permissions for.
3. Click **Permissions**, and then change the permissions for any Outlook folder that the delegate has access to.
4. 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.

### View another person's Calendar

1. On the **File** menu, point to **Open**, and then click **Other User's Folder**.
2. In the *Name* box, type the name of the person who granted you delegate access permission or click **Name** to select from a list.
3. In the *Folder* box, click **Calendar**.
  - If you manage the Calendars of several people, you can create a new group on the Outlook Bar and store shortcuts to their Calendars there. Right-click the background of the Outlook Bar, and then click Add New Group on the shortcut menu. Drag the Calendar shortcuts you created into this new group.
  - You can have Outlook automatically open another person's Calendar (or any Outlook folder) when you start Outlook. Just leave the folder window open when you quit Outlook.
  - If you have author or editor permission, any items the delegate creates while the shared Calendar is active are stored in the other person's Calendar.
  - To always have quick access to the Calendars you use often, add shortcuts to other people's Calendars to your Outlook Bar. (You must have reviewer permission to gain access to other people's mailboxes, and you must have added their mailboxes to your user profile.)

## Tips

- To always have quick access to the Calendars you use often, add shortcuts to other people's Calendars to your Outlook Bar. Right-click the background of the Outlook Bar, and then click Add to Outlook Bar on the shortcut menu. (You must have reviewer permission to gain access to other people's mailboxes, and you must have added their mailboxes to your user profile.)
- If you manage the Calendars of several people, you can create a new group on the Outlook Bar and store shortcuts to their Calendars there. Right-click the background of the Outlook Bar, and then click Add New Group on the shortcut menu. Drag the Calendar shortcuts you created into this new group.
- You can have Outlook automatically open another person's Calendar (or any Outlook folder) when you start Outlook. Just leave the folder window open when you quit Outlook.
- If you have author or editor permission, any items the delegate creates while the shared Calendar is active are stored in the other person's Calendar.

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### **Adding another person's mailbox to your user profile**

1. Click **Inbox**.
2. On the **Tools** menu, click **Services**.
3. In the *The following information services are set up in this profile box*, click **Microsoft Exchange Server**.
4. Click **Properties**, and then click the **Advanced** tab.
5. Click **Add**, and then type the mailbox name of the person whose mailbox you want to add to your user profile.

**Note:** The manager's mailbox must already be set up as a shared folder before a delegate can carry out this procedure. See the following procedure

### **Sharing your mailbox folder**

1. Display the **Folder** list.
2. Right-click the mailbox folder you want to share, and then click **Properties** on the shortcut menu.
3. Click the **Permissions** tab, and then click **Add**.
4. In the *Type name or select from list box*, type or select the name of the person you want to grant share permissions to.
5. Click **Add**, and then click **OK**.
6. In the *Name* box, click the name of the person you want.
7. In the *Roles* box, click **Reviewer**.

### **Scheduling an appointment for another person**

If you are not a delegate, you must have author or editor permission to carry out this procedure.

1. Open the manager's Calendar.

Here's how to open another person's folder:

- a) On the **File** menu, point to **Open**, and then click **Other User's Folder**.
  - b) In the *Name* box, type the name of the person who granted you sharing or delegate access permission, or click **Name** to select from a list.
  - c) In the *Folder* box, click the folder you want to open.
- Note** If you have author or editor permission, any items you create while the shared folder is active are stored in the other person's folder.

2. On the **File** menu, point to **New**, and then click **Appointment**.
3. In the *Subject* box, type a description.
4. In the *Location* box, enter the location.
5. Enter start and end times.
6. Select other options you want.
7. Click **Save and Close**.

### **Accept meeting requests for another person**

1. Open the manager's Inbox if the manager's meeting requests are not being sent directly to you.
2. Open the meeting request.
3. Click **Accept**, **Tentative**, or **Decline**.

### **Scheduling a meeting on behalf of another person**

1. Open the other person's Calendar.
2. On the **File** menu, point to **New**, and then click **Meeting Request**.
3. In the *To* box, type the attendee names or click **To** to select from a list..
4. In the *Subject* box, type a description.
5. In the *Location* box, type the location of the meeting.
6. Type the start and end times.
7. Select other options you want.
8. Click **Send**.

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

You can set reminders for your appointments. You can also specify how others view your Calendar by designating the time an appointment takes as busy, free, tentative, or out of office. You can schedule recurring appointments. Clicking an appointment selects it, and double-clicking the left move handle opens it. You can view your appointments by day, week, or month.

When you select start and end times for an appointment, you can take advantage of Autodate functionality and type text such as "next Tuesday" or "noon" instead of typing an exact date or time.

You can schedule an appointment in your own Calendar, and other users can give you permission to schedule or make changes to appointments in their Calendars. Appointments can also be made private.

A **meeting** is an appointment you invite people to or reserve resources for. You can create and send meeting requests and reserve resources for face-to-face meetings or for online meetings. To create an online meeting, such as a NetMeeting, select the *This is an Online Meeting check box* on the Appointment tab of your meeting request. When you create a meeting, you identify the people to invite and the resources to reserve, and you pick a meeting time. Responses to your meeting request appear in your Inbox. You can track responses by clicking Show attendee status on the Attendee Availability tab in the Appointment dialog box. You can also add people to an existing meeting or reschedule a meeting.

An **event** is an activity that lasts 24 hours or longer.

Examples of an event include a trade show, the Olympics, a vacation, or a seminar. **If you want to display a colleague's vacation time in your calendar, set it up as a multiple-day event and label it "Pat's Vacation" for example.** An annual event, such as a birthday or anniversary, occurs yearly on a specific date, while a standard event occurs once and can last for one day or several days. Events and annual events do not occupy blocks of time in Calendar; instead, they appear in banners. An all-day appointment displays time as busy when viewed by others, while an event or annual event displays time as free.

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## Free/busy time

In Calendar when viewing days, blocks of time that have been scheduled appear with a color or pattern to indicate how the time is used. The color or pattern identifies time as free, busy, tentative, or out of office.

This free/busy time	Appears with
Free	Clear or no color
Busy	Blue
Out of office	Purple
Tentative	Light blue
Unknown	Diagonal lines

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## Scheduling meetings

### Scheduling your own meeting

1. Click **Calendar**.
2. On the **Actions** menu, click **Plan a meeting**.
3. Invite attendees and resources.
4. Determine a meeting time.
5. Click **Make Meeting**.
6. In the *Subject* box, type a description.
7. If you did not schedule a room, enter the location in the *Location* box.
8. Select other options you want.
9. Click **Send**.
  - Tip: To send agendas or meeting minutes, attach a file to your meeting request.

### Invite attendees and resources to a meeting

1. Click **Calendar**.
2. On the Actions menu, click **Plan a meeting**.
3. Click **Invite Others**.
4. In the *Type name or select from* list box, enter the name of the person or resource you want at the meeting.
5. For each name entered, click **Required**, **Optional**, or **Resources**. The Required and Optional attendees appear in the To box, and Resources appear in the Location box.
6. Click **OK**, and then use the scroll bars to view the free/busy time for invitees.

### Tips

- You can quickly schedule a meeting with someone in your contact list. In Contacts, click the contact, click the Actions menu, and then click New Meeting with Contact.
- To get details on conference rooms, check the properties of each resource.

### Canceling a meeting

1. In **Calendar**, open the meeting you organized.
2. On the **Actions** menu, click **Cancel Meeting**.
  - You can also delete the meeting by clicking the meeting and then clicking Delete.



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