California State University
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Information Technology

MS Office Outlook 2007
Users Guide

Outlook 2007 - Exchange

Mail, Calendar, Contacts, Notes & Tasks Folders

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TABLE OF CONTENTS

INTRODUCTION

This document discusses basic concepts and focuses on using the Mail, Calendar, Contacts, Notes and Task Folders of Outlook 2007 Exchange to organize your workday. This includes creating items within the different folders of Outlook, sharing folders and assigning permissions for shared folders.

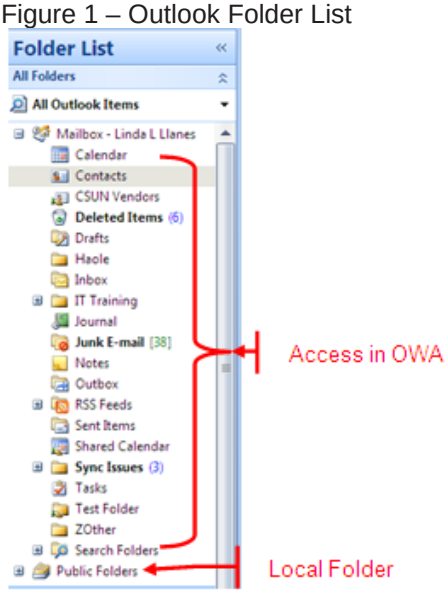
MANAGING YOUR EXCHANGE MAILBOX

Managing your mailbox is very important to help maximize campus resources and to ensure that the mailbox containing the Mail, Calendars, Contacts, Tasks and Notes Folders, do not exceed the 500mb quota. The Mail folder should be monitored daily as email, voice mail messages and attachments often use large amounts of space.

Best Practice Using Microsoft Outlook Exchange

- Following best practices will help you:
  - Organize your mailbox by using a system that is meaningful to you
  - Move items from your **Inbox** to your organized folders DAILY
  - Empty **Deleted Items** and **Junk E-Mail** folders DAILY
- The items in the **Mail, Calendar**, **Contacts**, **Tasks** and **Notes** folders contribute to the 500mb quota provided with the Exchange Mailbox.
- **Local** folders are located on your hard drive and are not available via Outlook Web Access (OWA) (see Figure 1, below).

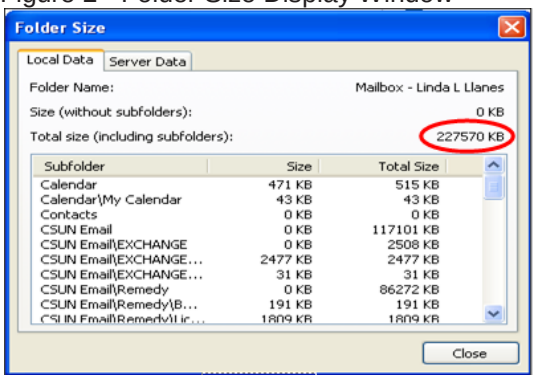
Figure 1 – Outlook Folder List



Determining Mailbox / Folder Size

1. Click **Folder List** shortcut.
2. Click **Folder Size…**
3. The **Folder Size** display window shows **Total Size (including subfolders)** and **Subfolder** breakdown (see Figure 2, below).

Figure 2 - Folder Size Display Window

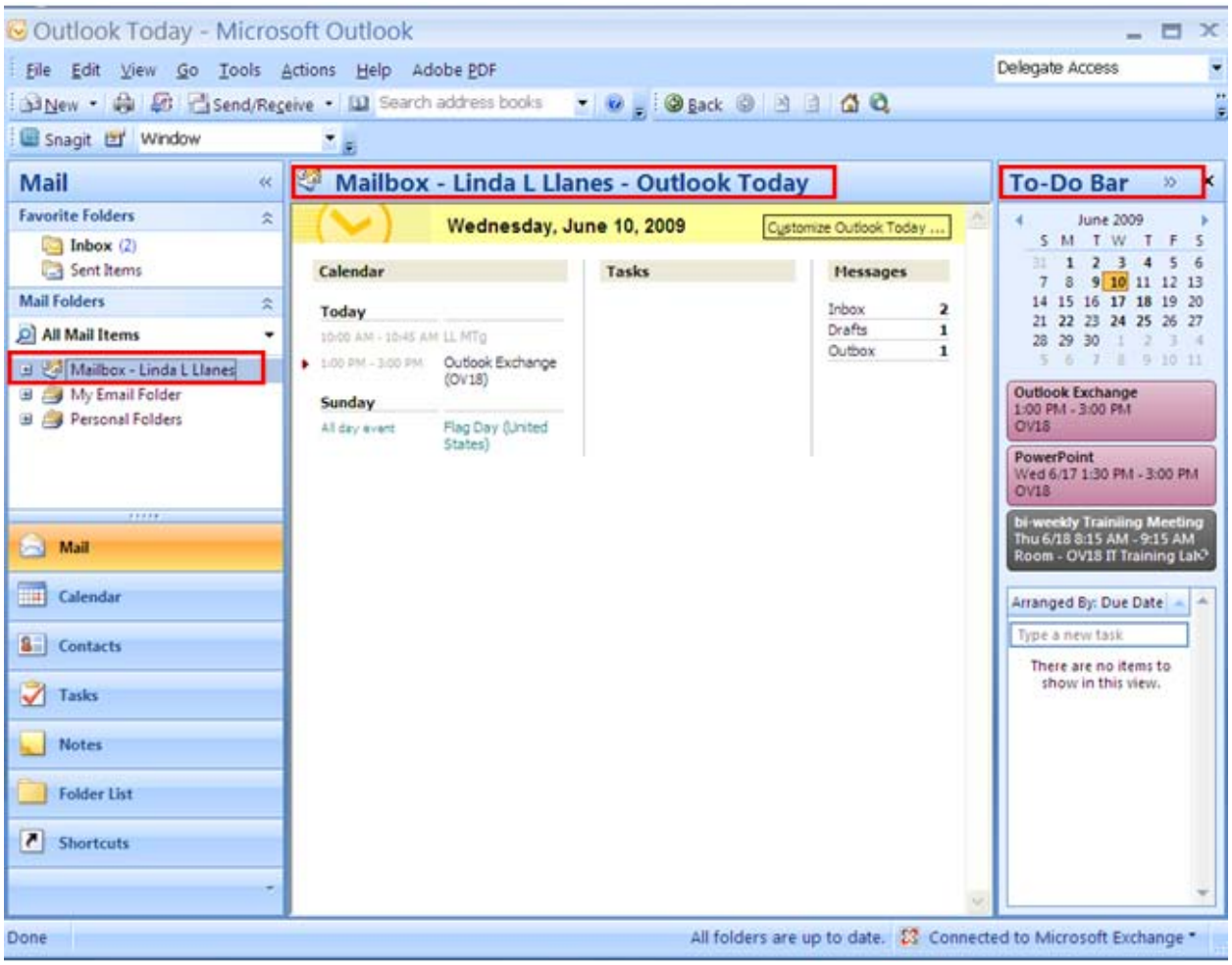


GETTING STARTED

Launching Your Outlook Application:

1. Click the **Start** button on the **Taskbar** at the bottom left corner of your Windows screen.
2. Click the **Microsoft Office Outlook 2007** icon**.**
3. Click on the **Mailbox – NAME** to display the **Mailbox – NAME – Outlook Today** window (see Figure 1, below).

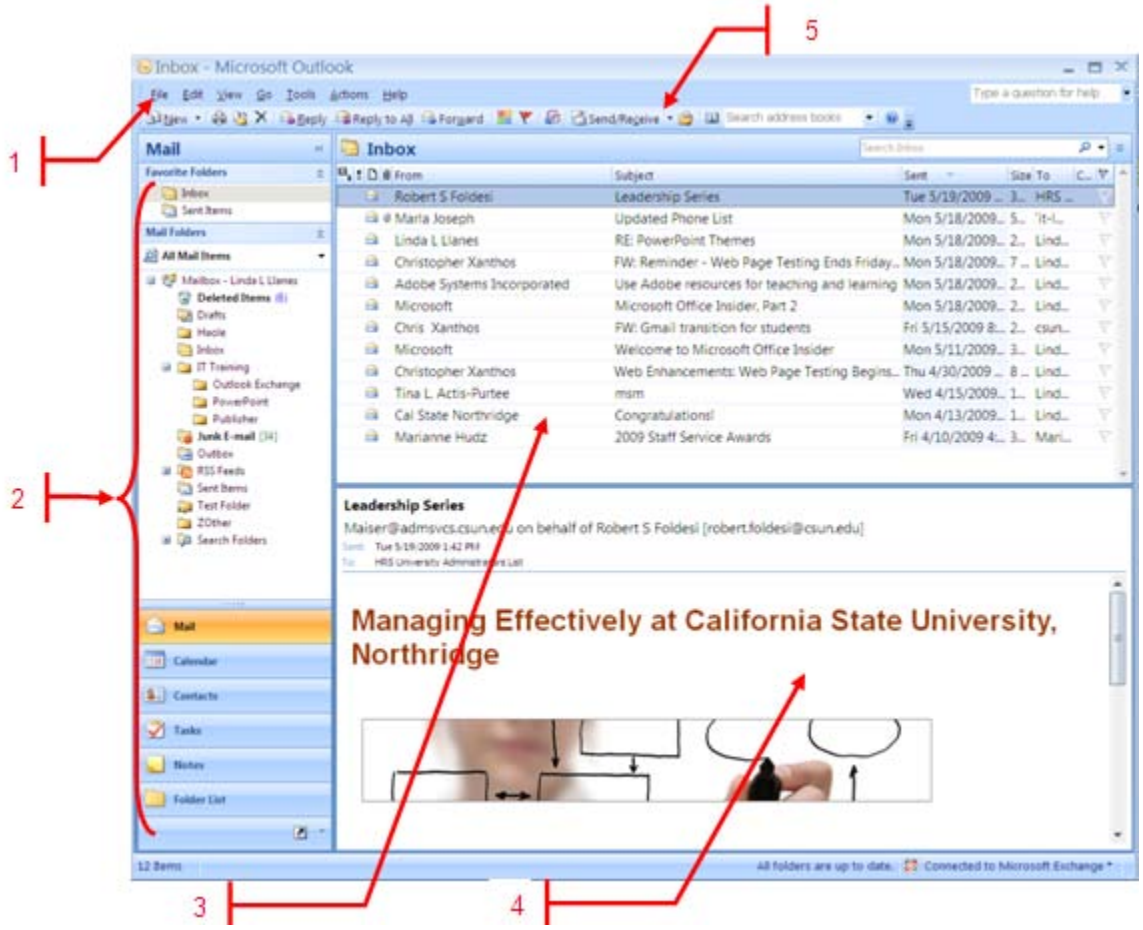
Figure 1 - Microsoft Outlook – Outlook Today View



Outlook 2007 Window

The Outlook window for the Mail, Calendar, Contacts, Tasks and Notes Folders are similar in that they contain the **Standard Toolbar**, a **Navigation Pane**, and a **Viewing Window**. Each window will provide different viewing options specific to the folder. Below is the **Mail Folder - Inbox** display window (see Figure 2, below)

Figure 2 – Inbox – Microsoft Outlook

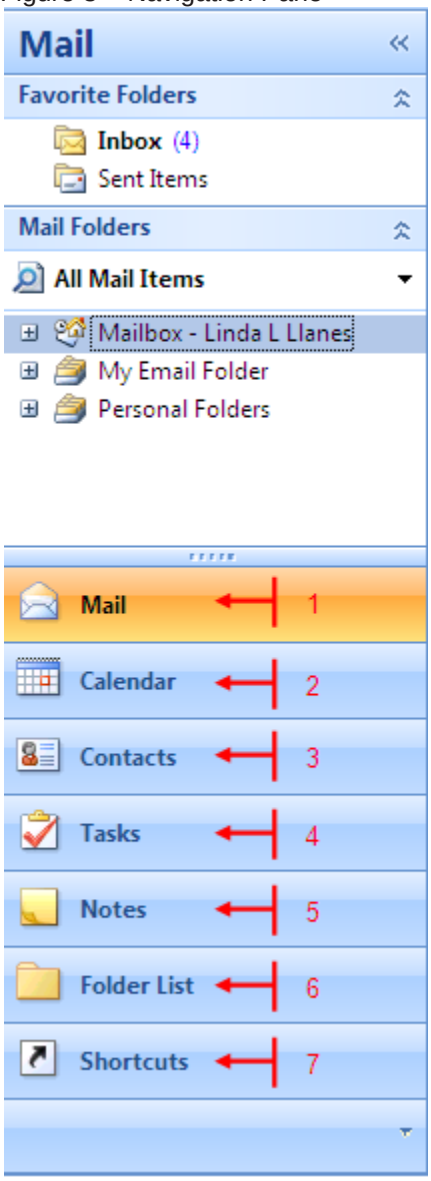


1. **Menu Bar** – Tools for use with Outlook 2007
2. **Navigation Pane** – Shortcuts to Folder List and Outlook folders.
3. **Viewing Pane** – Displays the contents of the selected folder.
4. **Reading Pane** – Displays the contents of the selected item without opening a separate window.
5. **Standard Toolbar** – Contains shortcuts for Outlook 2007 actions

Navigation Pane

The **Navigation Pane**, located on the left side of the Outlook window, provides shortcut access to the folders in your mailbox. Selecting a folder will display its contents in the window above. Currently the **Mail** folder is selected (see Figure 3, below).

Figure 3 – Navigation Pane



1. **Mail Folder:** where mail is composed, sent, received, and read.
2. **Calendar Folder:** where appointments and meetings are created and viewed.
3. **Contacts Folder:** contains contact information not available in the Global Address List.
4. **Tasks Folder:** where tasks are create, sorted, tracked, and assigned.
5. **Notes Folder:** where electronic post-able notes are created and viewed
6. **Folder List:** Displays the folder structure in a hierarchical format; contains **Folder Size** link
7. **Shortcuts:** Area to create and view additional shortcuts.

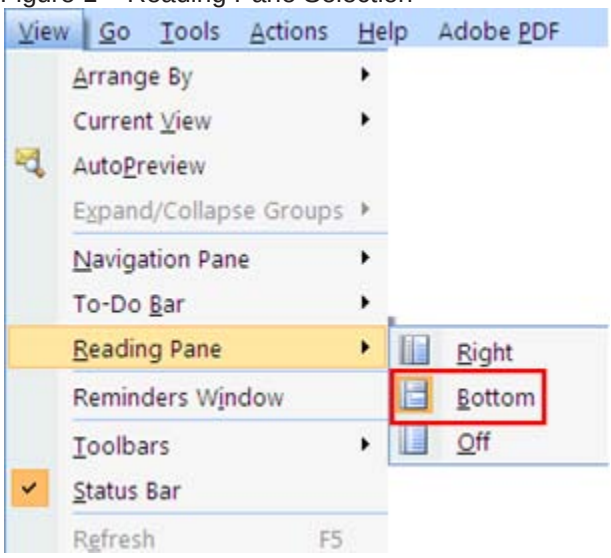
OUTLOOK 2007 MAIL FOLDER

The Outlook 2007 **Mail Folder** contains the mail subfolders used to assist the user in organizing the contents of the **Inbox**. In addition to the **Inbox** and the default provision of subfolders, users can create additional subfolders to meet their needs. The **Deleted Items** and the **Junk E-mail** folders should be emptied on a daily basis.

Previewing Mail Messages

1. To preview a message, click on the **Inbox** folder.
2. Turn the **Reading Pane** on; Select **View—Reading Pane—Right / Bottom** (see Figure 1, below).
3. Highlight the message to preview.
4. Content is displayed in the **Reading Pane**.

Figure 1 – Reading Pane Selection



Opening Mail Messages

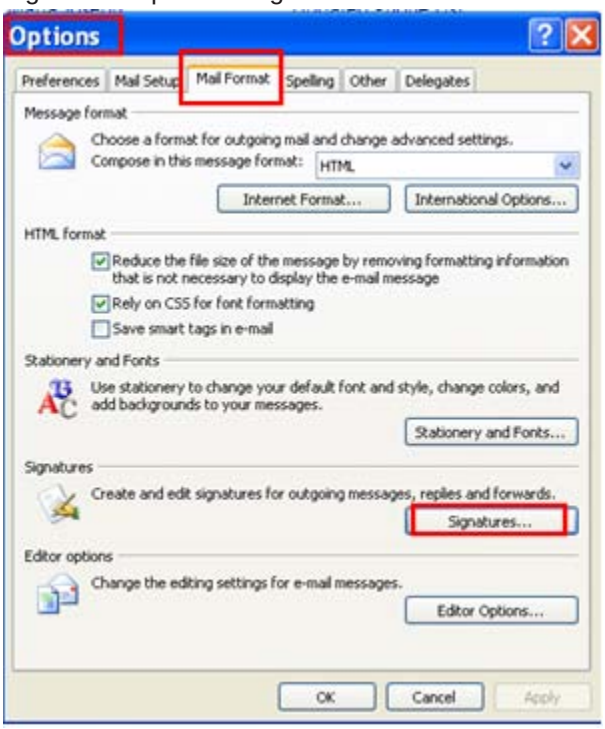
1. To open a message in a separate window, **double click** the message.
2. To close the message, click the **Close** icon in the upper-right corner of the message window.

Creating Signatures

You can create custom signatures for different types of audiences.

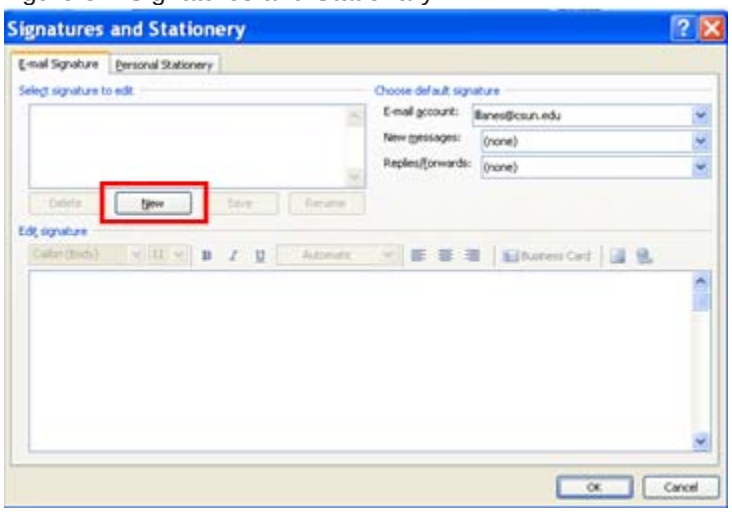
1. On the **Tools** menu, click **Options**, and then click the **Mail Format** tab.
2. Click the **Signatures...** button (see Figure 2, below).

Figure 2 – Options - Signature



3. The **Signatures and Stationary** window displays (see Figure 3, below).
4. Click the **New** button.

Figure 3 – Signatures and Stationary

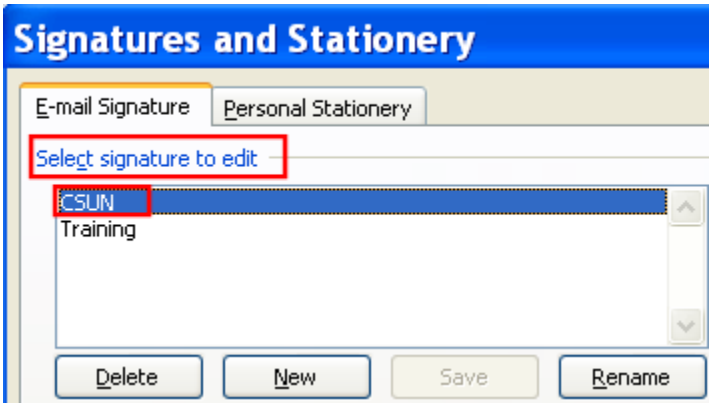


5. In the **New Signature** window, enter a name for your new signature in the **Type a name for this signature:** field and click **OK** (see Figure 4, below).

Figure 4 - New Signature

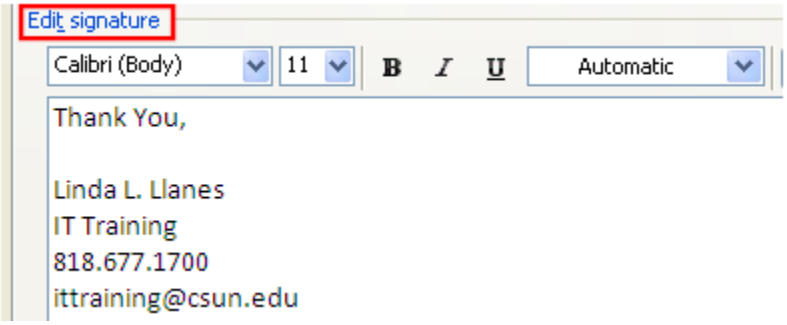
6. The new signature name will appear highlighted in the **Select signature to edit** list (see Figure 5, below).

Figure 5 - Select and Edit Signature



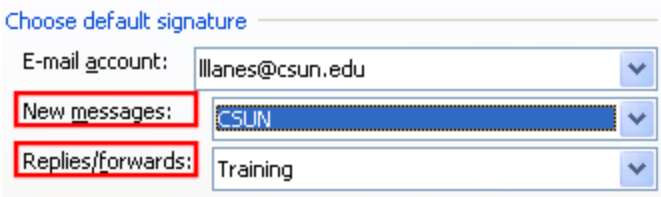
7. Enter and format your signature information in the **Edit signature** window (see Figure 6, below).

Figure 6 - Edit Signature Section



8. In the **Choose default signature** section, select the appropriate signatures for **New messages:** and **Replies/forwards:** (see Figure 7, below).
9. Click **OK**.

Figure 7 – Choose Default Signature

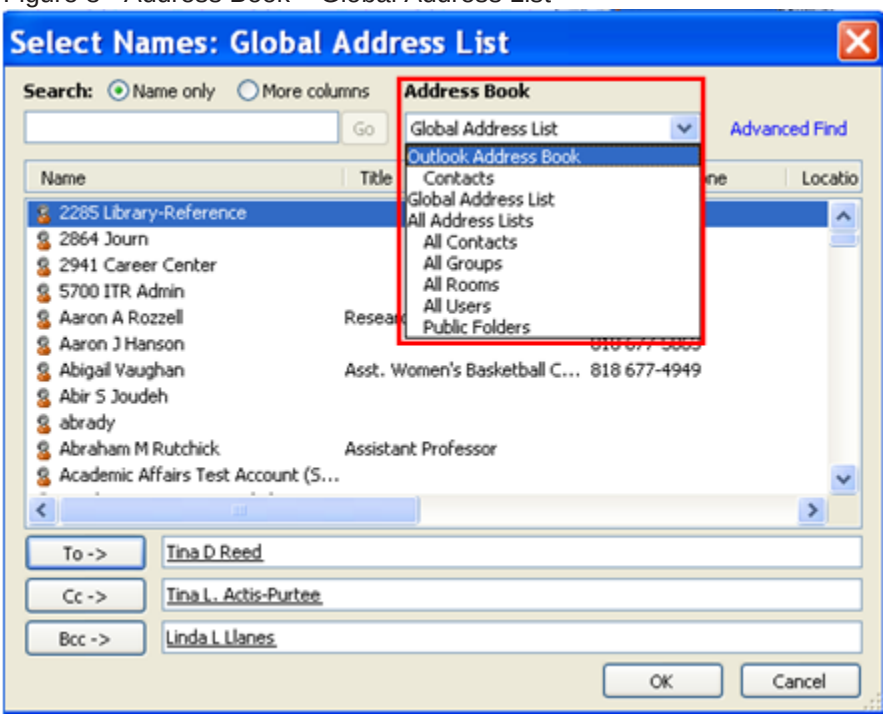


Using the Global Address List (GAL)

What is the Global Address List (GAL)?

- The **GAL** is a list of CSUN Exchange users that is 'Globally' accessible by all Exchange users.
- The **GAL** is listed in the **Address Book** field (see Figure 8, below).

Figure 8 - Address Book – Global Address List



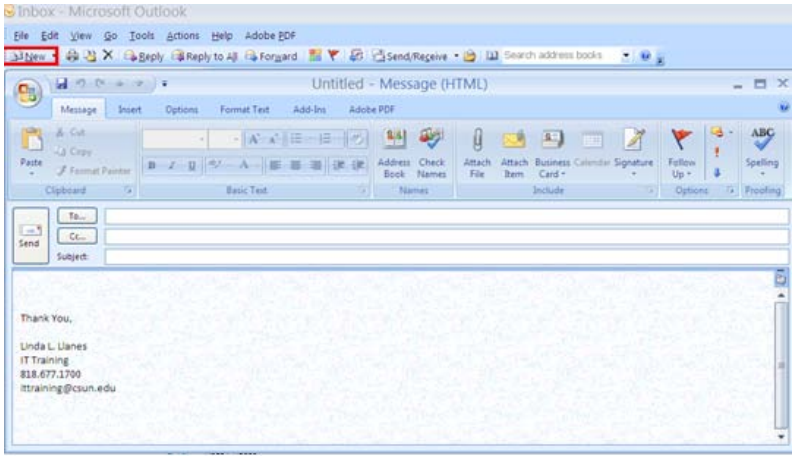
- The IT department can setup distribution groups (groups of email addresses) by department or project, to improve productivity and communication.

- Restrictions can be placed on distribution groups so only certain users are allowed to send to it. An example would be a policy by which only executives could send to the distribution group containing 'all employees'.
- If you want to see the members of a distribution group, simply right-click on one of the group lists and select '**Properties**' and the properties window will appear.

Creating a Mail Message

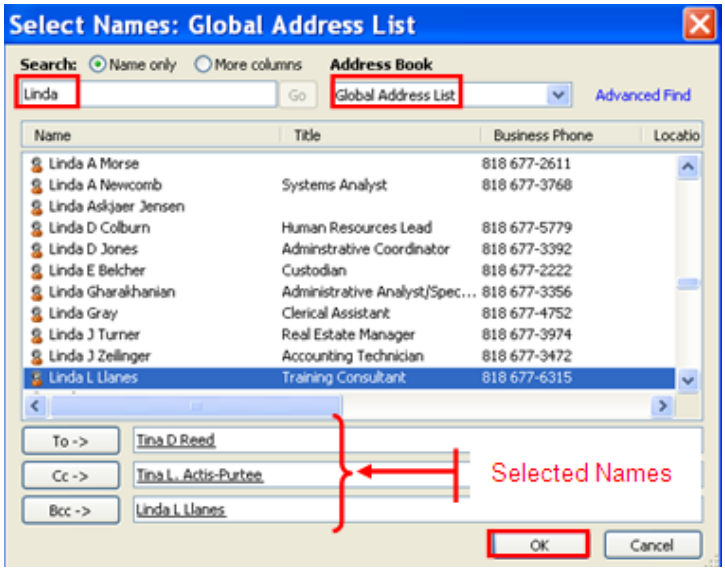
1. Click the **New Mail Message** icon; top left hand corner.
2. The **Untitled – Message (HTML)** display window opens (see Figure 9, below).

Figure 9 - New – Untitled – Message (HTML) Window



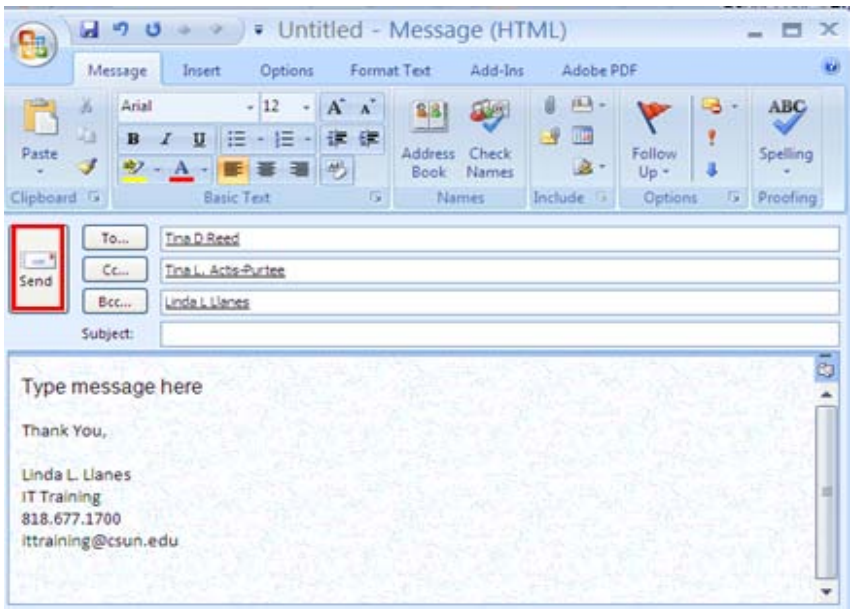
3. Click the **To**, **Cc**, or the **Bcc** button to add names from **GAL** or other contact list. *Separate names with a semicolon (;)* (see Figure 10, below).

Figure 10 - New – Select Names Global Address List



4. Click **OK**
5. In the message body, type the message.
6. Click the **Send** button (see Figure 11).

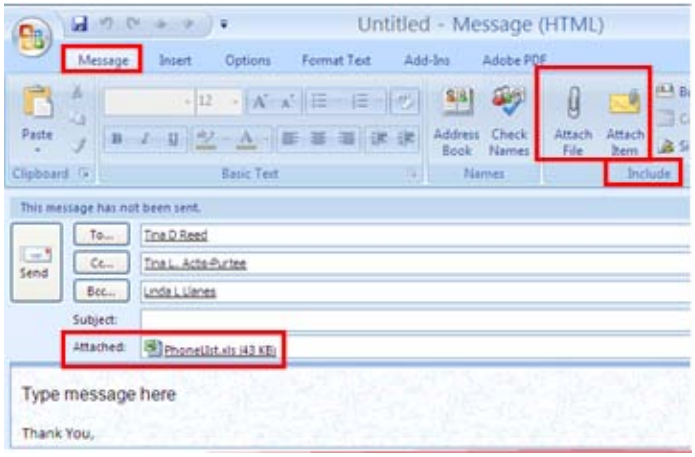
Figure 11 - New – Completed Message



Adding Mail Attachments

1. On the **Message** tab - **Include** group, click **Attach File**, to add documents, spreadsheets, etc or **Attach Item** to add an Outlook item; email, calendar items etc.
2. Locate and highlight the file to attach (see Figure 12, below).
3. Click the **Insert** button.
4. Complete message and click the **Send** button.

Figure 12 - New Message with Attachment



Recalling Sent Messages

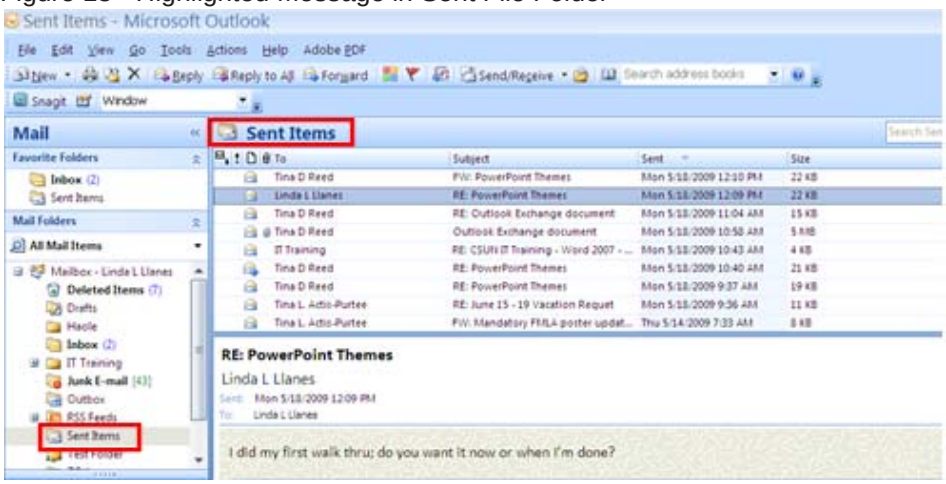
There may be times where you send a mail message and quickly realize you didn't mean to send the message, or you noticed an error in the e-mail that needs to be fixed. Exchange 2007 has an option to recall messages. However, there are several caveats:

- The recipient must be an Outlook Exchange user.
- Message must be unread.
- Copy of message may be saved on e-mail server.

To Recall a Message:

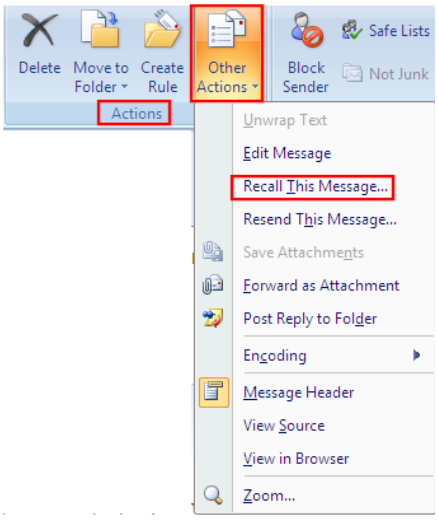
1. Select the **Sent Items** folder (see Figure 13, below).

Figure 13 - Highlighted Message in Sent File Folder



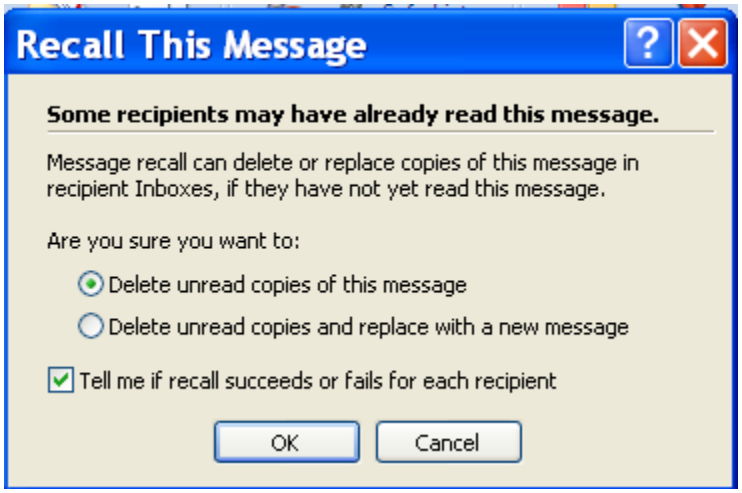
2. **Double-click** the e-mail you wish to recall to open it.
3. Select **Actions - Other Actions…** - **Recall this message…** (see Figure 14, below).

Figure 14 - Sent Message - Recall This Message



4. Choose to either **Delete unread copies of this message** or **Delete unread copies and replace with a new message**.
5. Check or uncheck the **Tell me if recall succeeds or fails for each recipient** box as desired (see Figure 15, below).

Figure 15 – Recall This Message Options

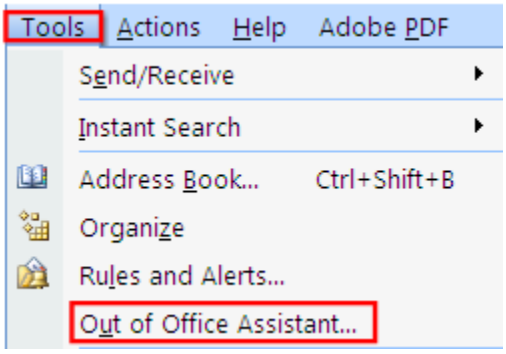


6. Click **OK**.
7. If you chose to replace the e-mail, enter in your new message and click **Send**.

Auto Reply Using the Out of Office Assistant

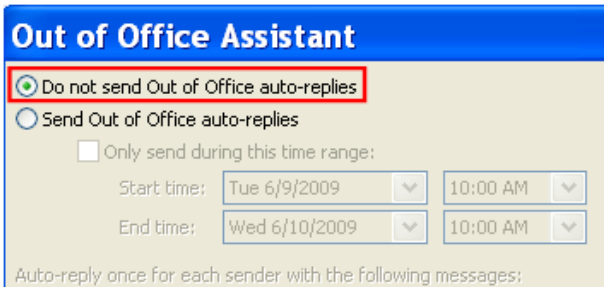
1. From the **Tools** menu, click **Out of Office Assistant** (see Figure 16, below).

Figure 16 – Tools - Out of Office Assistant



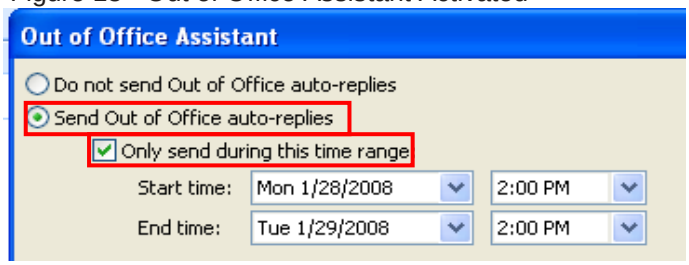
2. In the **Out of Office Assistant** display window, **Do not send Out of Office auto-replies** is the default setting (see Figure 17, below).

Figure 17 - Out of Office Assistant – Default Setting



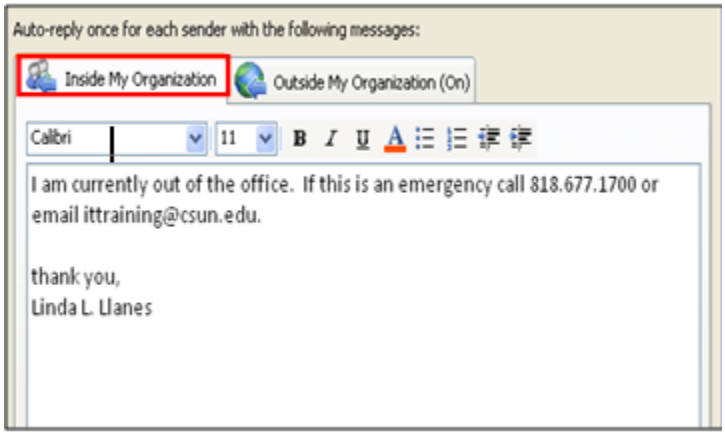
3. Click **Send Out of Office auto-replies** and the **Only send during this time range** box.
4. The **Start time:** and **End time:** fields are activated and allow you to set the dates when you want auto replies sent (see Figure 18, below).

Figure 18 - Out of Office Assistant Activated



5. **Auto-reply once for each sender with the following messages:** allows you to create a response for incoming messages received from: (see Figure 19, below).
   - **Inside My Organization**

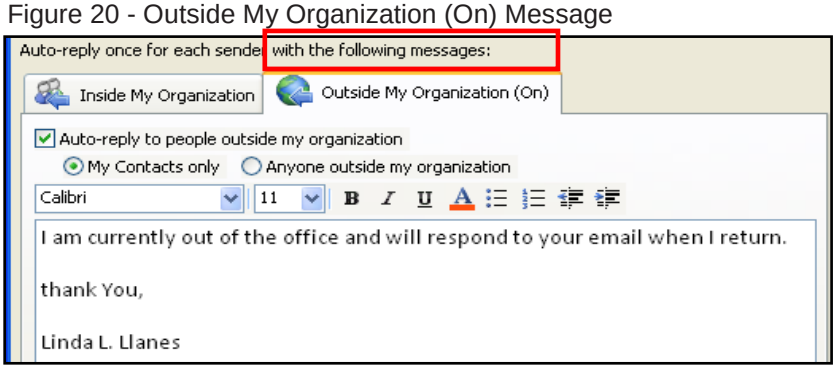
Figure 19 - Inside My Organization - Message



- **Outside My Organization (On)**

On the **Outside My Organization (On)** tab, select the **Auto-reply to people outside my organization** check box, AND select **My Contacts only** (recommended) (see Figure 20, below).

Figure 20 - Outside My Organization (On) Message



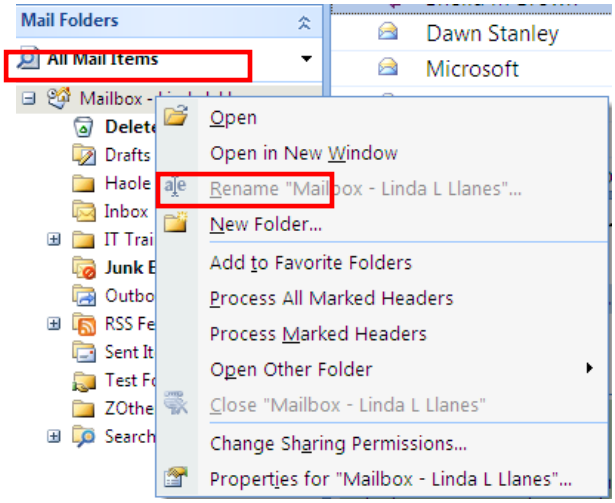
Personal Outlook Address Book

The Global Address List, **GAL,** is routinely updated based on university information. Users can create a personal Outlook address book to save information not available in the GAL.

To create a personal address book:

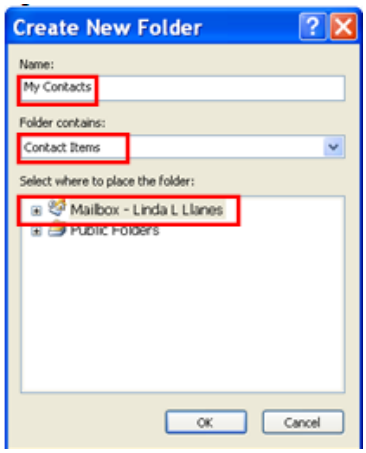
1. In the **Navigation Pane**, right-click **Mailbox – your name** and, select '**New Folder'**. (see Figure 21, below).

Figure 21 – Create a Personal Address Book



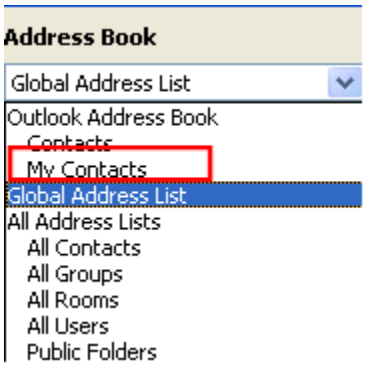
2. The **Create New Folder** display window opens (see Figure 22, below).
3. In the **Name** field, enter a name for the folder.
4. From the **Folder contains** drop down list, select **Contact Items.**
5. In the **Select where to place the folder** box, select where you want the folder to be located. Selecting **Mailbox – YOUR NAME** makes the folder available when using OWA.

Figure 22 - Create New Folder



6. Click **OK**
7. The new personal address book will be available in the **Address Book** section (see Figure 23, below).

Figure 23 - Address Book – My Contacts



Personal Folders in Outlook (.pst)

- Personal folders provide many benefits such as:
  - Allowing you to create back-up copies of your folders on your hard drive.
  - Enabling you to move items to your hard drive to avoid exceeding your disk quota on the CSUN Exchange server.
- Choose which type of Personal Folder is right for you
  - Create a Personal Folder to transfer individual e-mail messages onto your local

hard drive.

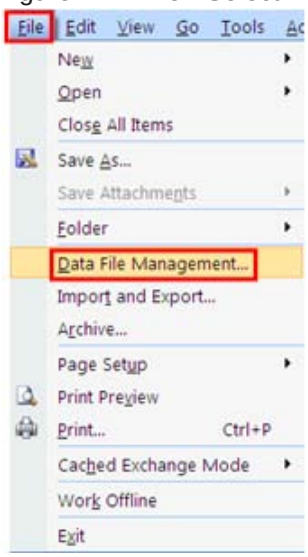
- Create a Personal Folder to make a copy of your entire email account including messages, contacts, and calendar events.

- Saving individual items into a Personal Folder
  - Personal folders are stored locally; on your hard drive
  - Available only when using a specific computer
  - Not available when using OWA
  - Is no longer part of the Exchange environment; backups are recommended.

Creating a Personal Folder (.pst file)

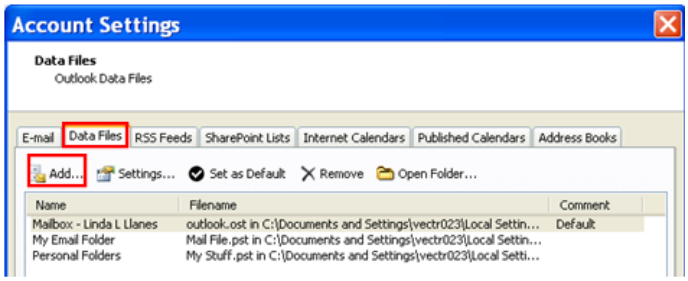
1. Click on the **File** Menu.
2. Select **Data File Management**. (See Figure 24 below)

Figure 24 – File - Select Data File Management



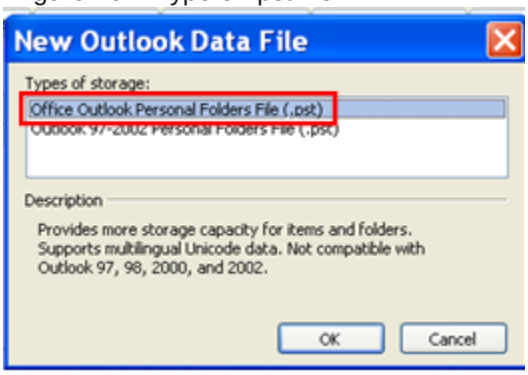
6. The **Account Settings** display window appears (see Figure 25, below)
7. Under the **Data Files** tab, click the **Add** button.

Figure 25 – Account Settings Display Window



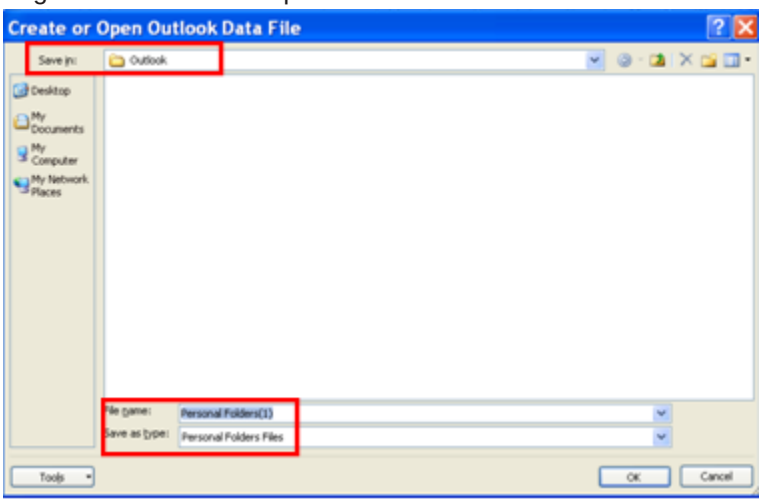
8. The **New Outlook Data File** display window appears (see Figure 26, below).
9. Select **Office Outlook Personal Folders File (.pst)** from the **Types of storage:** list
10. Click **OK**.

Figure 26 – Type of .pst file



11. The **Create or Open Outlook Data File** window appears (see Figure 27, below).

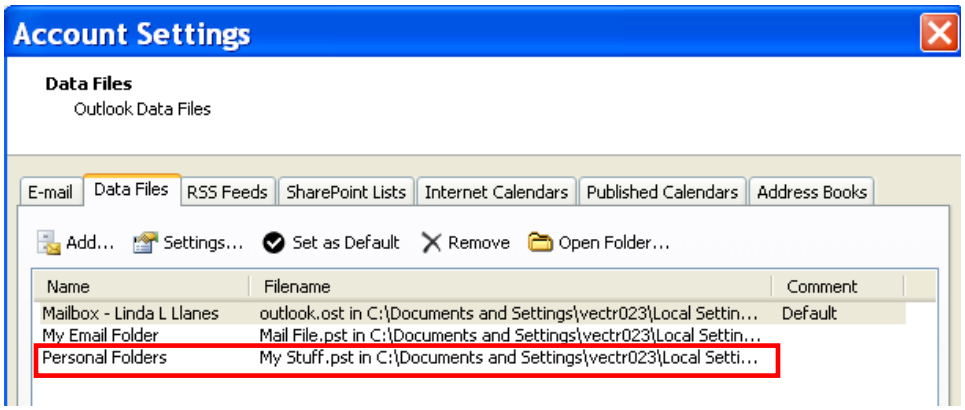
Figure 27 - File Name .pst file



12. Select the location for the folder in the **Save in:** field.
13. Type a descriptive name for your Personal Folders in the **Name:** field. This name will appear in the **Navigation Pane**.
14. Check the **Save as type** field reads **Personal Folders Files**.
15. Click **OK**.

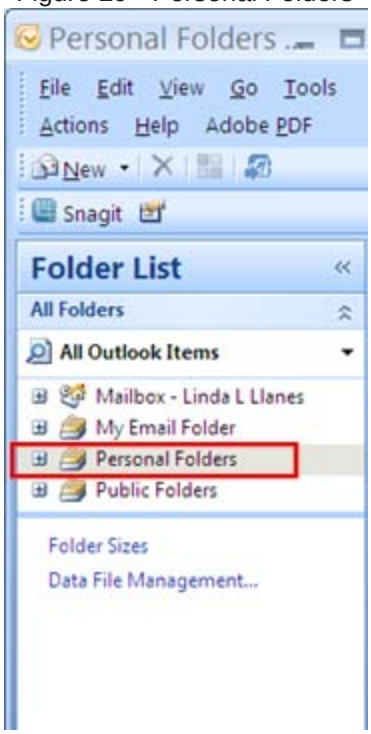
16. The new **Personal Folder** appears in the **Account Settings** window (see Figure 28, below).

Figure 28 – New .pst Folder



17. Click **Close**.
18. The **Personal Folders** appears in your list of Outlook folders in the **Navigation Pane**. (see Figure 29, below).

Figure 29 - Personal Folders



19. To view the contents of the .pst folders, click the **Folder List** shortcut in the **Navigation Pane**.
20. To **Move** messages, select messages.
21. **Drag and Drop** to new folder.

Accessing Junk Email Options

The **Junk E-mail Options** work in conjunction with other filtering features to prevent delivery of unwanted mail messages. It uses updated spam lists to evaluate if a message should be treated as junk mail based on the following:

- By **default**, the filter is set to **Low** to catch the most obvious junk e-mail. Any message that is caught is moved to the **Junk E-mail** folder.
- Filtering is based on the content of the message in general and uses analysis of the structure of the message to determine the probability that it is junk e-mail.
- Uses the **Safe Senders List** so mail from known senders is not treated as junk e-mail.
- Users in the **Contacts Folders** are automatically trusted by default; messages from people in your **Contacts** folder will not be considered as junk e-mail.
- Addresses in the **Blocked Senders List** blocks specific e-mail addresses or domain names.
- Messages from within your organization are not treated as junk e-mail regardless of the content of the message.

To access additional **Junk E-mail Options**:

1. From the **Tools** menu, select **Options**.
2. Select the **Preference** tab.
3. Select the **Junk Email…** button (see Figure 30, below).
4. The **Junk E-mail Options** window displays.
5. Select the additional options for junk e-mail protection.
6. Click **OK**.

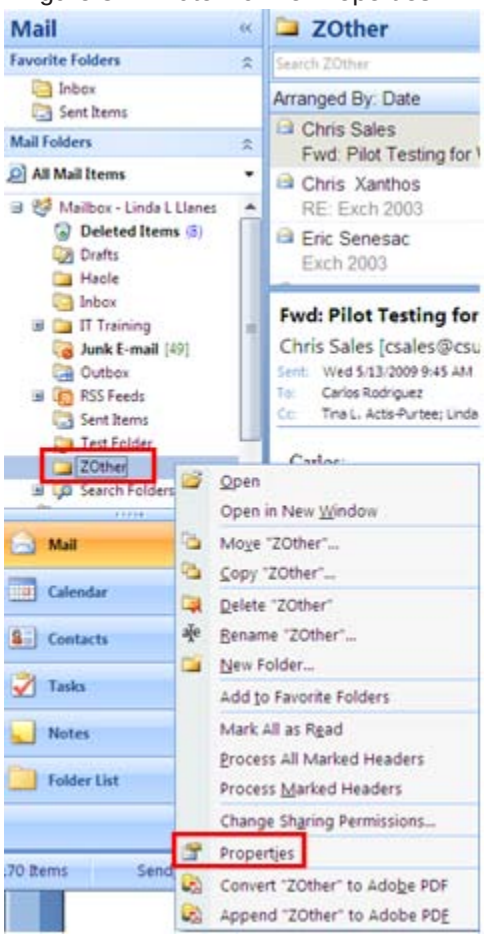
Figure 30 – Junk E-mail Options

Archiving Mail

To periodically archive your mail requires a .pst folder in a known location. Archiving can be done one of two ways:

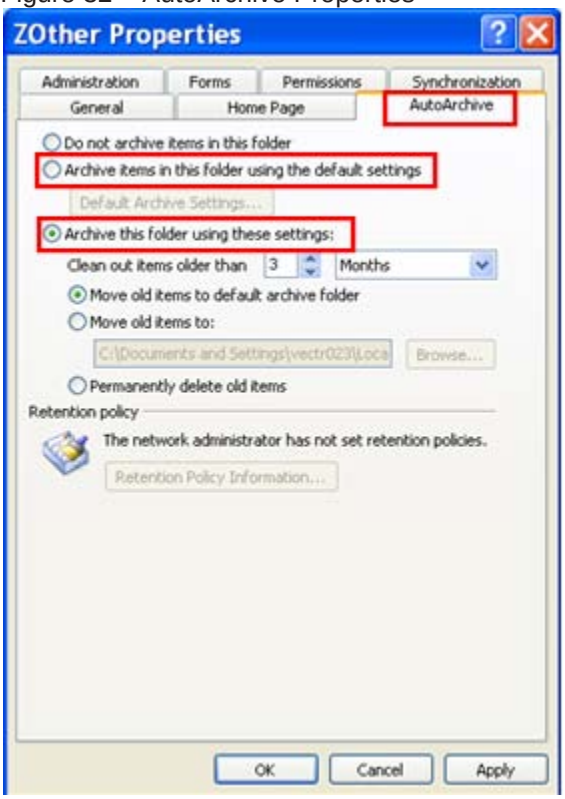
- **Manually** moving mail messages from your mailbox to a **.PST** folder using the drag and drop method.
- **AutoArchive** items on a scheduled basis.
    a. On the **Navigation Pane**, click **Folder List**
    b. **Right-click** the folder you want to AutoArchive, click **Properties** (see Figure 31, below).

Figure 31 – AutoArchive Properties



c. In the **ZOther Properties** window, click the **AutoArchive** tab (see Figure 32, below).
d. Select either **Archive items in this folder using the default settings** or **Archive this folder using these settings**.
e. Select the necessary information to complete the archive.
f. Click **OK**.

Figure 32 – AutoArchive Properties

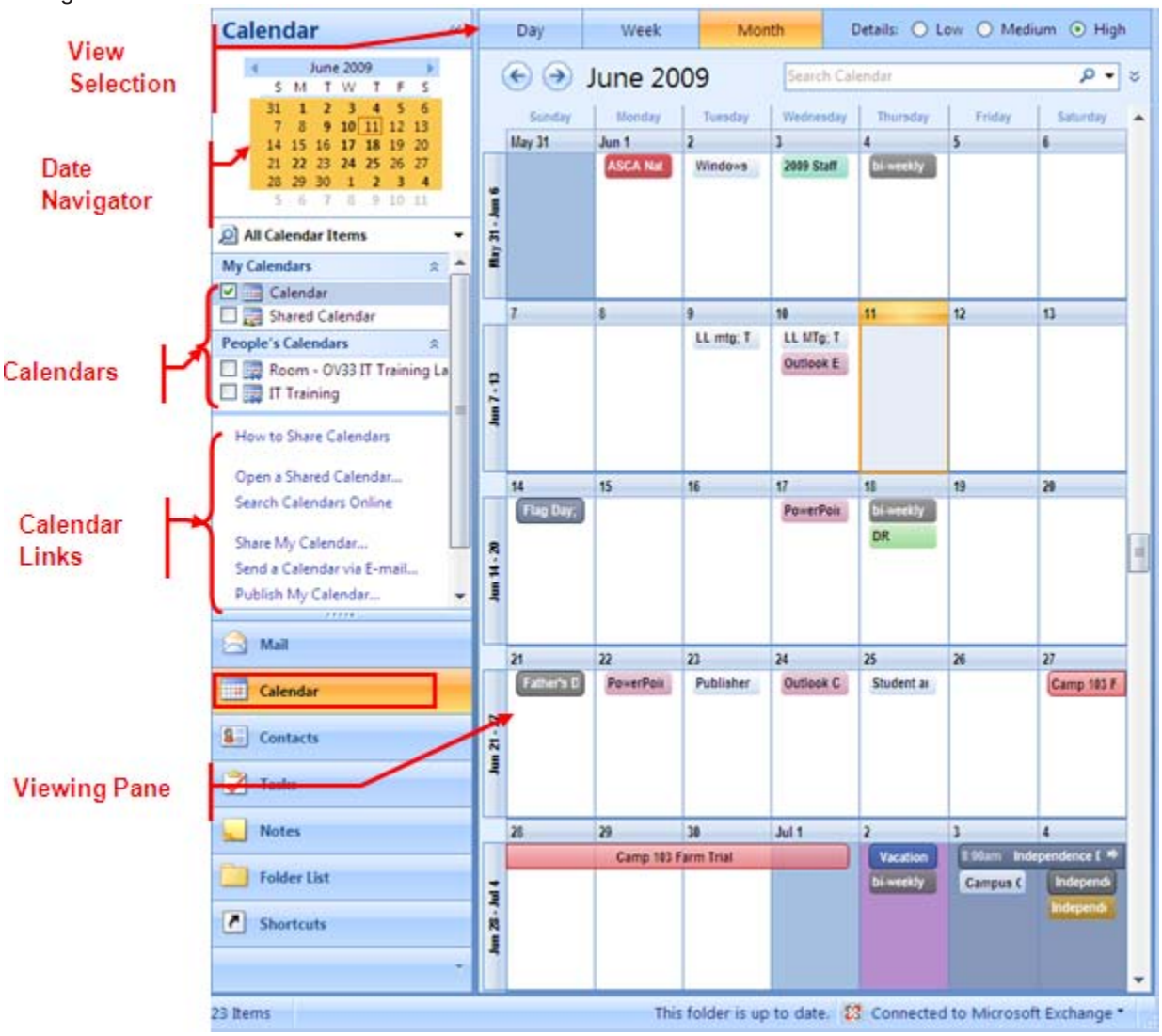


OUTLOOK 2007 CALENDAR FOLDER

Outlook 2007 Calendar Window

The Outlook 2007 Calendar Folder provides easy viewing of appointments, meetings and shared calendars. In addition, it provides easy access links to the **Date Navigator**, the **Share My Calendars** link, the **Open a Shared Calendar** link and to the **Day**, **Week**, **Month** viewing selections (see Figure 1, below).

Figure 1 Outlook 2007 Calendar Window



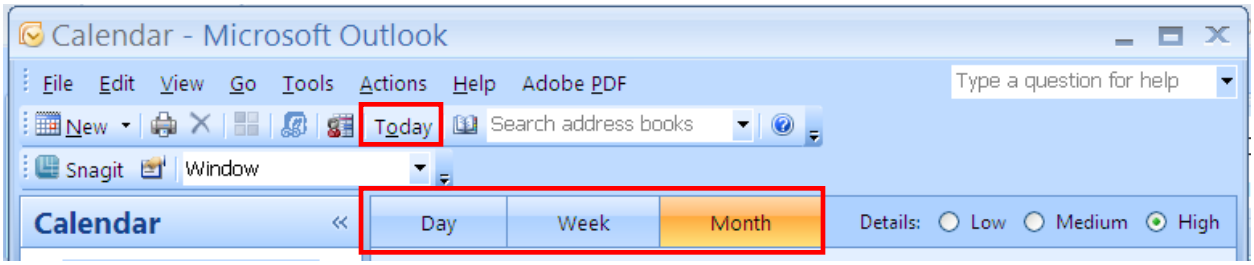
Choosing a Calendar View

There are three different ways to view the calendar, making it easy to find and view your availability, appointments and meetings. The options are:

- **Day** - Shows the events for one (1) particular day
- **Week** – To select work week or full week, click **Tools – Options – Calendar Options**
- **Month** – Shows the entire month

To return to the current day, click on **Today** (see Figure 2, below).

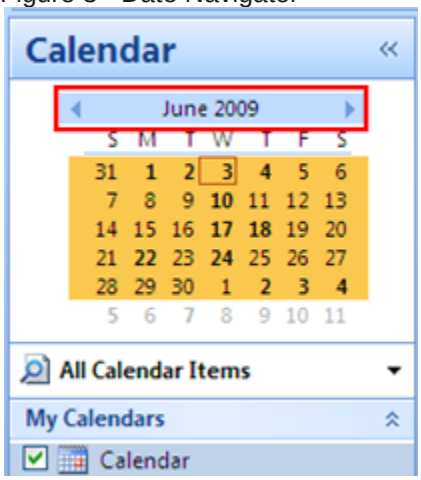
Figure 2 - Choosing a Calendar View



Viewing a Specific Date

1. To view a specific date, **Click** on the date in the **Date Navigator**, located at the upper right of the window (see Figure 3, below).
2. To move forward or back from the current month **Click** on the **Left** or **Right** arrow located on either side of **Date Navigator** month.

Figure 3 - Date Navigator



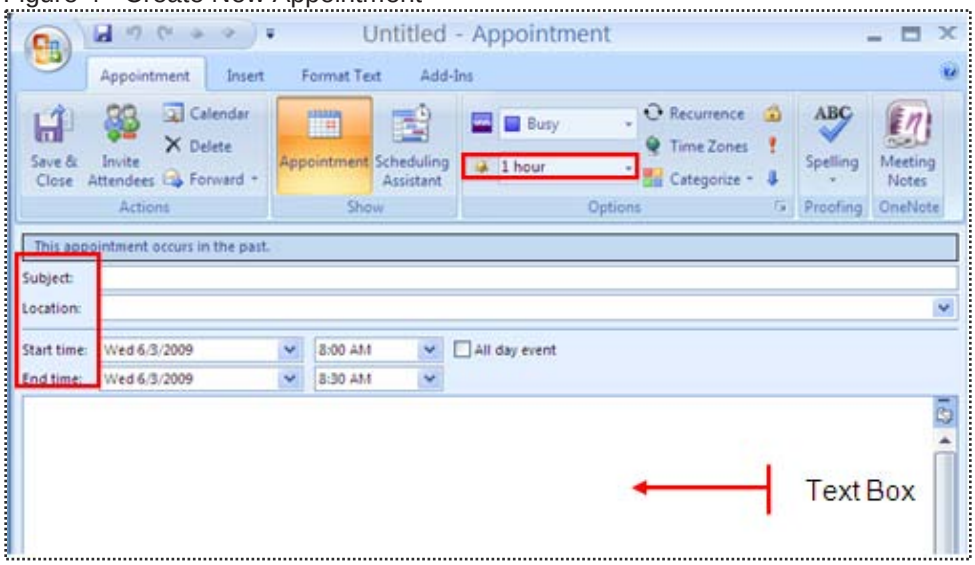
Sizing the Calendar

1. Point the mouse to the right or left border of the calendar.
2. **Click** and **hold** the mouse button, move the border as desired.

Creating New Appointments

1. **Click** the **New** icon on the toolbar**.**
2. The **Untitled - Appointment** display window appears (see Figure 4, below).

Figure 4 - Create New Appointment

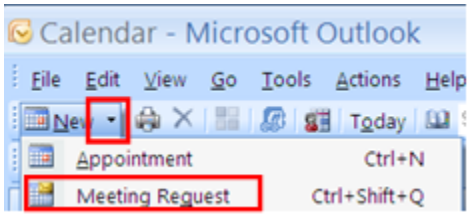


3. Populate the **Subject Location**, **Start/End Time** fields.
4. Click the **Reminder** drop down arrow to select a reminder time.
5. In the **Text** box type any pertinent information for the appointment.
6. Click **Save & Close** to record the appointment on the calendar.

Creating a New Meeting Request

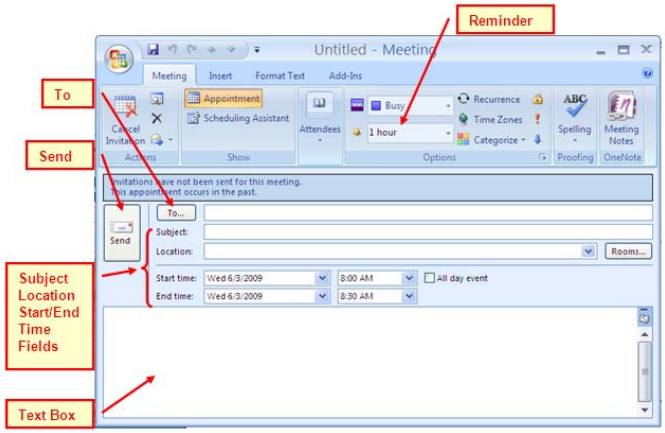
1. **Click** the **down arrow** on the **New** icon and select **Meeting Request** (see Figure 5, below).

Figure 5 - Create New Meeting Request



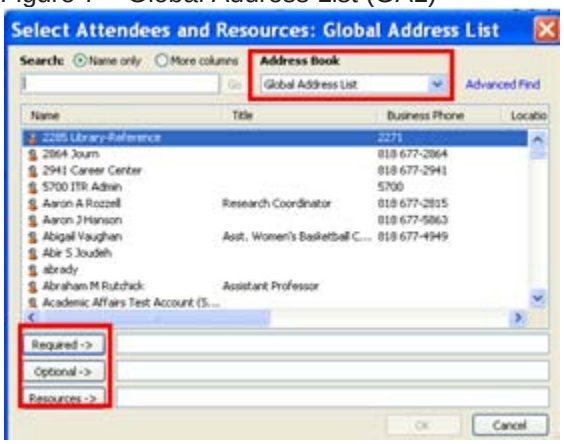
2. The **Untitled—Meeting** display window appears (see Figure 6, below).

Figure 6 - Untitled - Meeting Request Display Window



3. Click the **To…** button to display the **Select Attendees and Resources: Global Address List** window (see Figure 7).

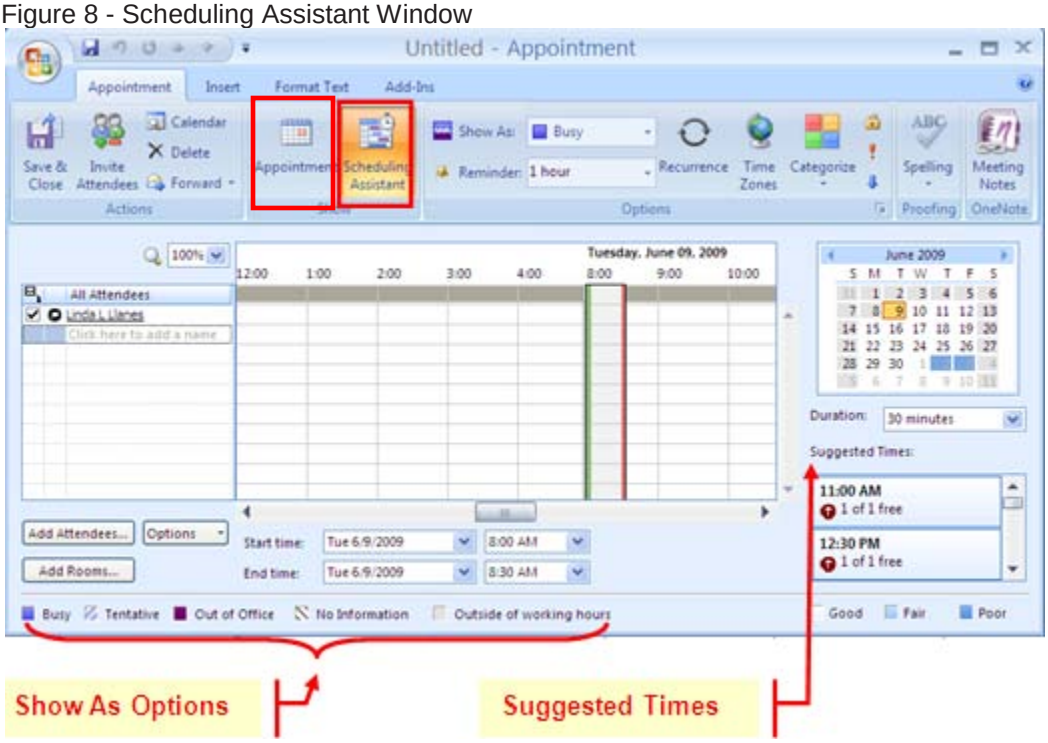
Figure 7 – Global Address List (GAL)



4. Using the **GAL** (Global Address List), select the desired names.
5. Click **Required** or **Optional** to add people OR click **Resources** to add a room or equipment.
6. Click **OK**.
7. Populate the **Subject, Location**, and **Start and End Time**, **Reminder** and **Note** fields as desired.

8. To verify attendee availability, click on the **Scheduling Assistant** icon (see Figure 8, below).

Figure 8 - Scheduling Assistant Window

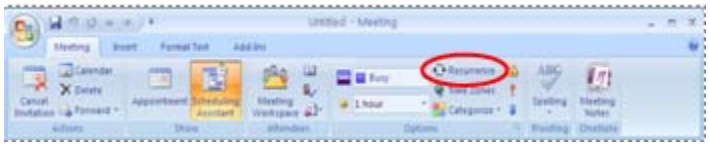


9. The **Scheduling Assistant** window displays, showing the availability of attendees based on the **Show As** option entered for each attendee.
10. Select a time when all invitees are available, or scroll the **Suggested Times:** section to view attendee availability.
11. Click the **Appointment** icon to return to the **Meeting Request** display window.
12. Click the **Send** button.

Recurring Appointments/Meetings

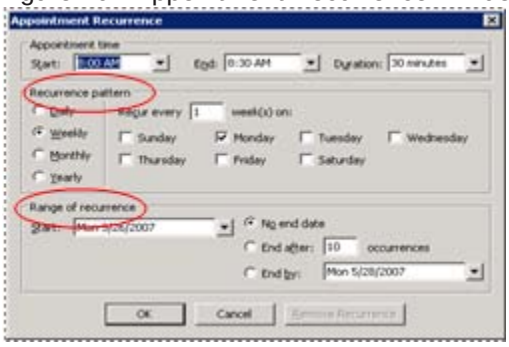
1. Click on the **Recurrence** button on the **Options** group menu (see Figure 9, below).

Figure 9 - Recurrence Button



2. In the **Appointment Recurrence** window, under **Recurrence pattern**, select the appropriate pattern (see Figure 10, below).

Figure 10 - Appointment Recurrence Window

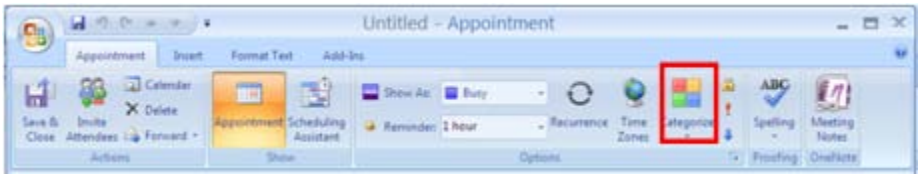


3. Under **Range of recurrence**, select the appropriate range.
4. Click **OK**.

Assigning Categories

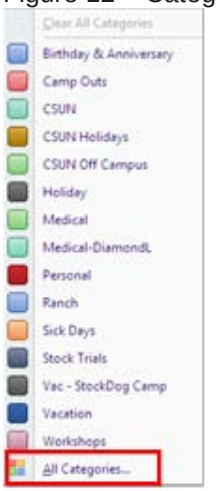
1. Create a new appointment, from the **Appointment tab**, click the **Categorize** icon (see Figure 11, below).

Figure 11 - Categorize icon



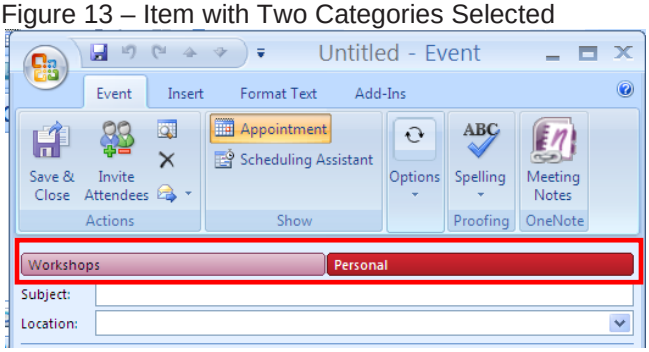
2. From the **Categorize** drop down menu, **double-click** to assign one or more categories (see Figure 12, below).

Figure 12 – Categorize Menu



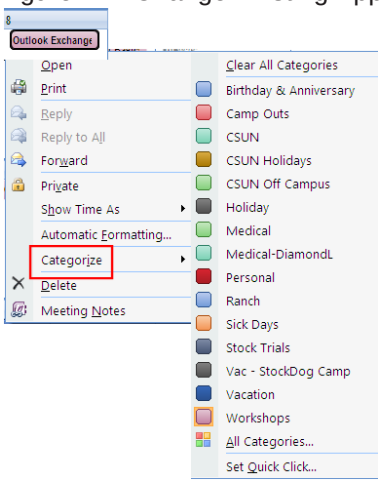
3. The item will reflect the number of categories selected (see Figure 13, below).

Figure 13 – Item with Two Categories Selected



4. To assign categories to *existing items*, **right click** the item, click **Categorize** and highlight the desired categories from the context menu (see Figure 14, below).

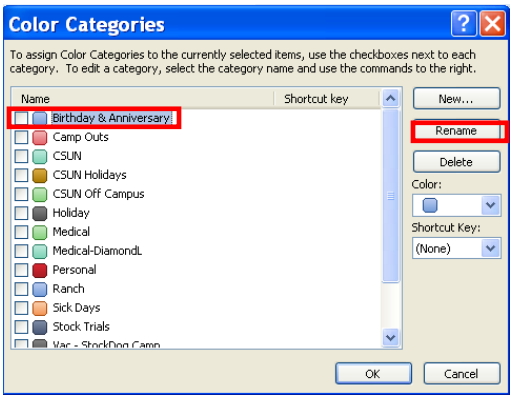
Figure 14 - Change Existing Appointment Category



Renaming Predefined Categories

1. In **Calendar**, select an item to activate the **Categorize** icon.
2. Click the **Categorize** icon**.**
3. Click **All Categories….**
4. In the **Color Categories** display window, select the **Category** to rename, click **Rename**.
5. **Type** the new name
6. Click **OK** (see Figure 15, below).

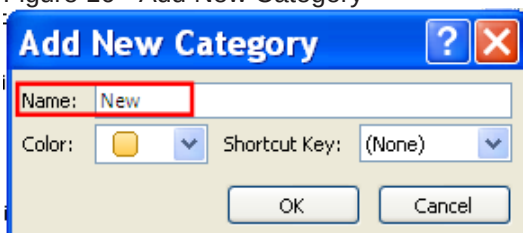
Figure 15 - Color Categories Window



Adding a New Category:

1. From the **Color Categories** display window, select the **Category** to rename, click **New**.
2. Type the **Name:** field type the name.
3. Select a **Color/Shortcut** Key.
4. Click **OK** (see Figure 16, below).

Figure 16 - Add New Category



Deleting a Category

1. From the **Color Categories** display window, select the **Category** to delete.
2. Click **Delete**.

Note: Deleting a category deletes it only from the Master Category List. Any existing items with an assigned category will maintain that category assignment.

Outlook Calendar Symbols

In the Outlook calendar, symbols represent some of the features associated with meetings or appointments. The following table describes the symbols.

Symbol	Name	Description
	Recurring item	Represents an appointment or meeting that recurs on a specified scheduled.
	Exception to recurring item	Represents an item, such as an appointment or meeting, that recurs on a specified schedule; however, this one instance is different — or an exception — from the usual pattern of the recurrence.
	Data conflict	A conflict exists between the data on your local computer and the Microsoft Exchange Server. To resolve the conflict, open the item and follow the instructions shown on your screen.
	Start time of an appointment or meeting	Most commonly seen with multi-day items in the Week or Month views where a specific start and end time have been set. The time shown in the symbol matches the start time of the item.
	End time of an appointment or meeting	Most commonly seen with multi-day items in the Week or Month views where a specific start and end time have been set. The time shown in the symbol matches the end time of the item.
	Scheduled meeting	A meeting with one or more people is scheduled.
	Private item	If you share your calendar information with other people using Microsoft Exchange or are publishing calendar items to a Web site, marking items private prevents details such as subjects, notes, or location from appearing.
	Reminder	A reminder is associated with Appointment or meeting to give advance notice of a pending event.
	Meeting Workplace	A workplace is associated with appointment or meeting
	File Attachment	A file attachment is associated with this item
	More Items	There are more items than can be shown in the current view.

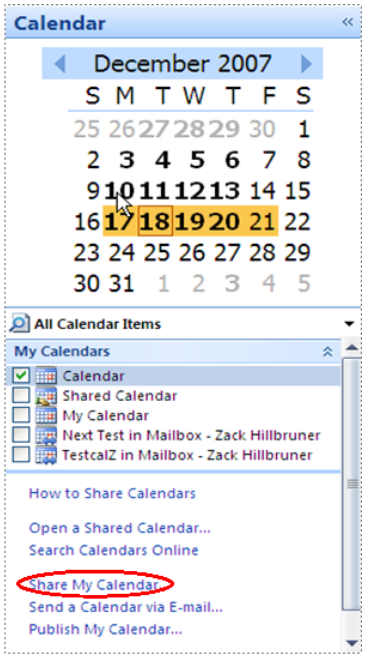
Sharing a Calendar Folder

Outlook Exchange allows users to share their **Calendar Folder** with other Exchange users and provides several permission level options that can be assigned to individuals they have shared their calendars with.

Sharing your **Primary** calendar:

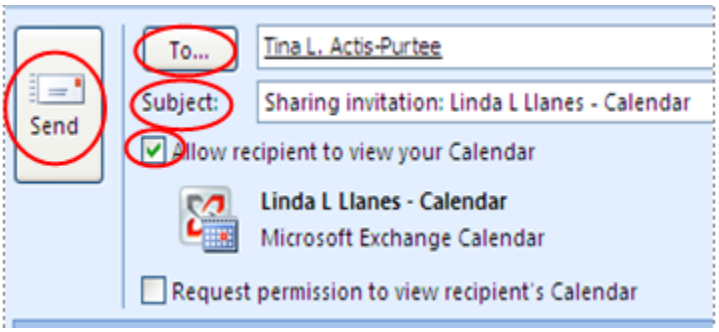
1. In the **Navigation Pane**, under **Calendars**, click **Share My Calendar….** (see Figure 17, below).

Figure 17 - Share My Calendar Link



2. The **Sharing Invitation: …Calendar – Share** display window opens.
3. In the **To…**, select the name of the person you want to share your calendar with (see Figure 18, below).

Figure 18 - Share Calendar Email Window



4. Provide **Subject:** information.
5. Check **Allow recipient to view your Calendar**.
6. Add appropriate information in the message body.
7. Click **Send.**
8. Review the confirmation and click **OK**.

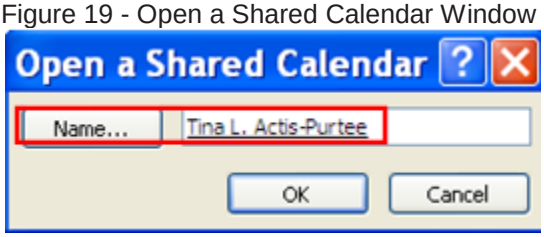
NOTE: If you want to request access to a calendar other than the default Calendar, you must send an e-mail message to **Request permission to view recipient's Calendar**.

Opening a Shared Calendar Folder

Up to 30 calendars can be viewed side-by-side in the **Calendar** viewing pane. Shared calendars must be **opened** before they can be viewed.

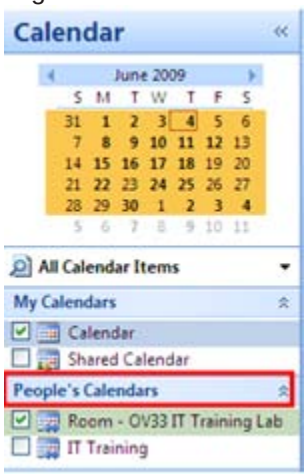
1. Click the **Calendar shortcut** from the **Navigation Pane**.
2. Click **Open a Shared Calendar**.
3. In the **Open a Shared** Calendar display window, click the **Name… button** to select the person's name from the **GAL** address book or type the name as it is listed in the **GAL** (see Figure 19, below).

Figure 19 - Open a Shared Calendar Window



4. The shared calendar name will appear under in the **Navigation Pane**, under **People's Calendar** (see Figure 20, below).

Figure 20 - User's Calendar Display

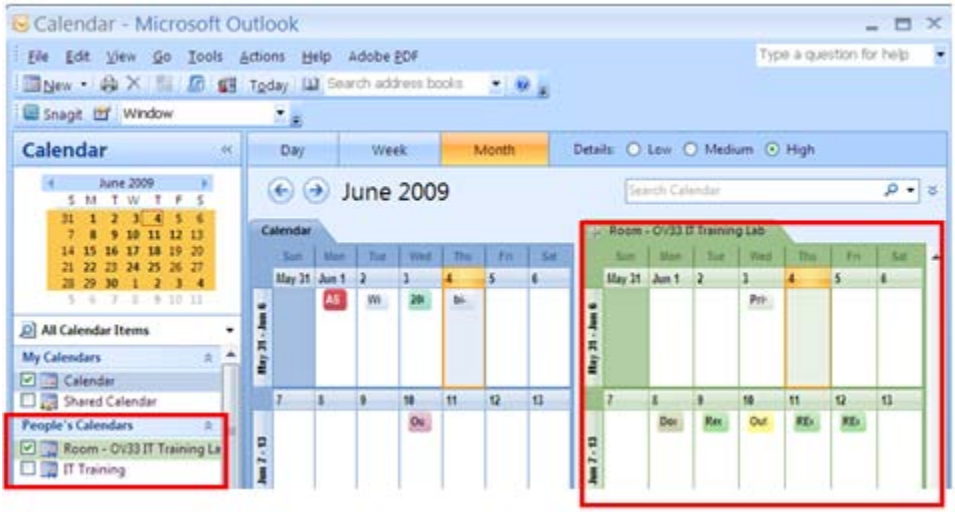


Viewing Shared Calendar Folders

Shared calendars are assigned **Read Only** permissions when initially shared and can be easily viewed.

1. In the **Navigation Pane**, check the box next to calendar you wish to view.
2. The **Shared Calendar** selected will display to the right of the calendar currently being viewed (see Figure 21 below).
3. In the **Navigation Pane**, check only the boxes of those calendars you wish to view. Deselect those you do not wish to view.

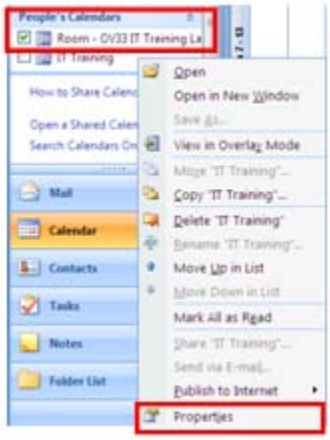
Figure 21 - Viewing a Shared Calendar



Modifying a Shared Calendar Folder Permissions - Owners

1. Right-click the **Calendar Folder** to access its permissions.
2. Click **Properties** (see Figure 22, below).

Figure 22 – Calendar Properties



3. In the **Calendar Properties** display window, click the **Permissions** tab (see Figure 23, below).

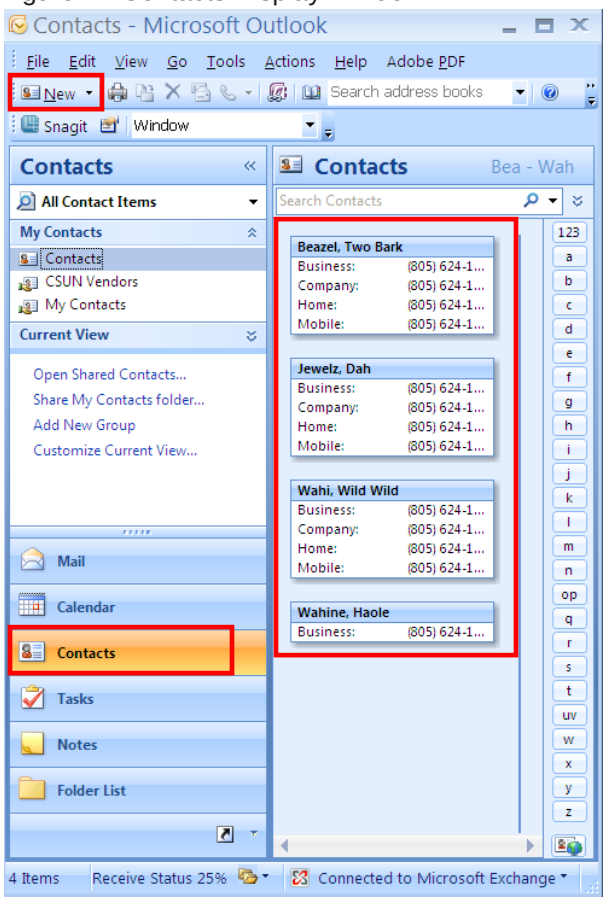
Figure 23 - Calendar Properties - Permissions

4. Select the **Name** of the individual whose permissions you want to modify.
5. Modify the **Permissions** section as desired. Refer to **Outlook 2007 Folder Permission Levels**, page 66, for permission level descriptions.
6. Click **OK**.

OUTLOOK 2007 CONTACTS FOLDER

The **Contacts Folder** is the address book containing information for people and businesses that are not CSUN Exchange users. The **Contacts Folder** provides for multiple email addresses, telephone numbers, addresses, etc (see Figure 1, below).

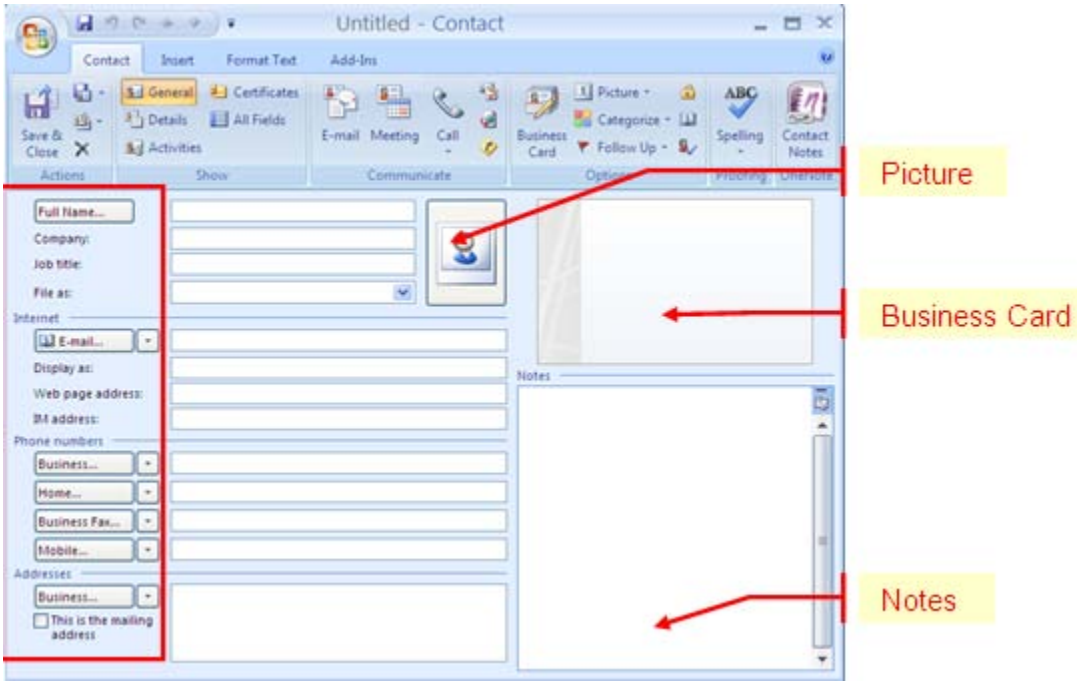
Figure 1 - Contacts Display Window



Creating a New Contact

1. From the **Contacts Folder**, click the **New** icon on the toolbar
2. Enter the **Full Name**, **Internet**, **Phone**, and **Address** information in the respective fields (see Figure 2, below).

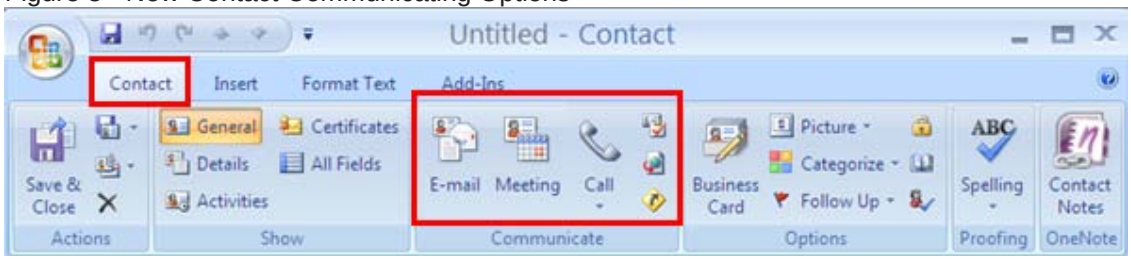
Figure 2 - New Contact Window



3. Enter additional information in the **Picture** box; the **Business Card** section, and a **Notes** section.
4. Click **Save and Close**.
5. From the **New** contact display window, under the **Contacts** tab, **Communicate** group, there are several communications icons available; **E-Mail**, **Meeting**, etc. (see Figure 3, below).

Note: While the **GAL** does not impact user quota, information added to the **Contacts Folder** does. It is recommended that only pertinent data be included.

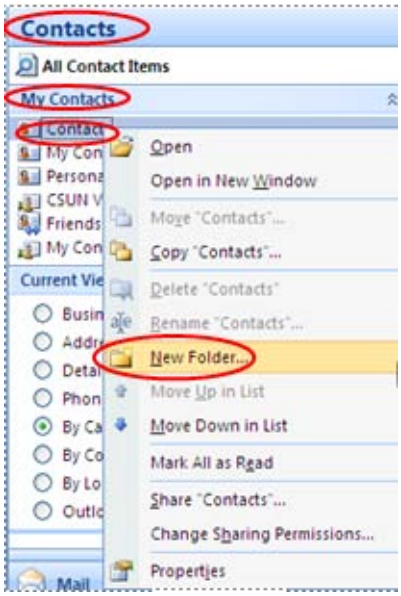
Figure 3 - New Contact Communicating Options



Creating Secondary Contacts Folder

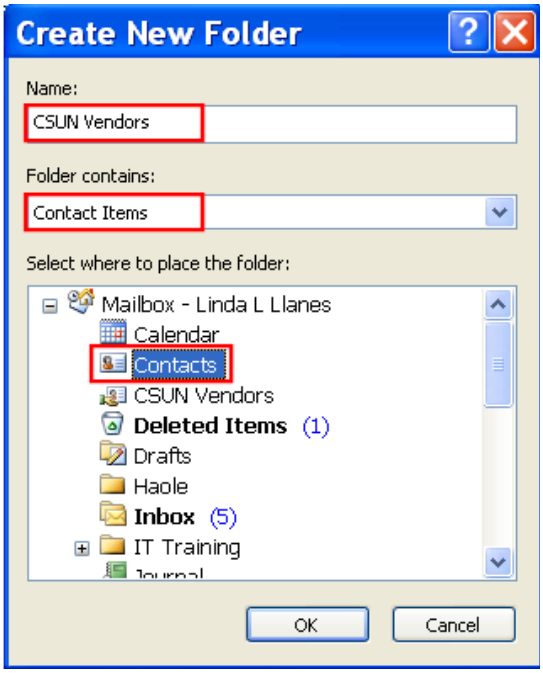
1. From the **Navigation Pane**, click on **Contacts** (see Figure 4, below).
2. Under **My Contacts** right click **Contacts**.
3. From the submenu click **New Folder…**

Figure 4 - Create Secondary Contacts Folder



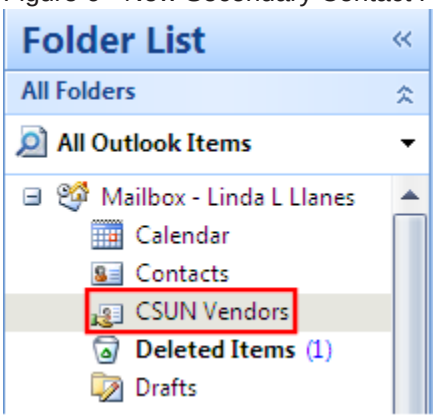
4. The **Create New Folder** window displays (see Figure 5).

Figure 5 – Create Secondary Contacts Folder



5. Enter a name for the new contact folder in the **Name:** field.
6. In the **Folder contains:** field select **Contact Items**.
7. In the **Select where to place the folder:** choose where you would like the folder to appear.
8. Click **OK**.
9. Verify that the folder appears in the correct place (see Figure 6, below).

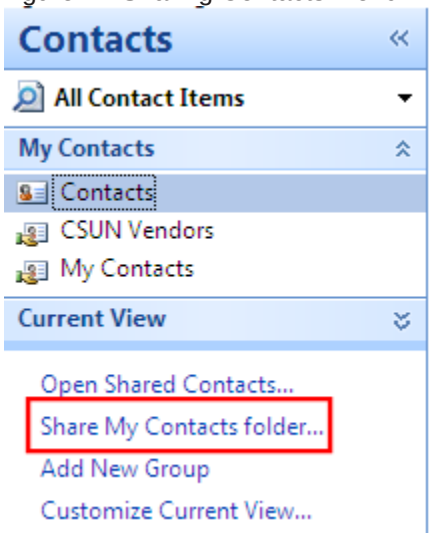
Figure 6 - New Secondary Contact Folder



Sharing the Contacts Folder

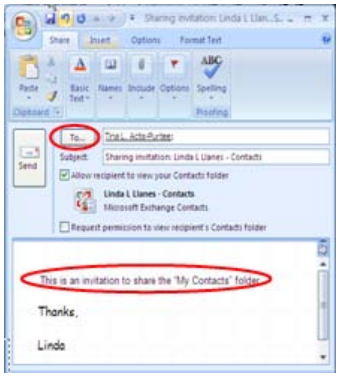
1. From the **Navigation Pane**, click the **Contacts Folder**.
2. Click the **Share My Contacts folder** (see Figure 7, below).

Figure 7 - Sharing Contacts Menu



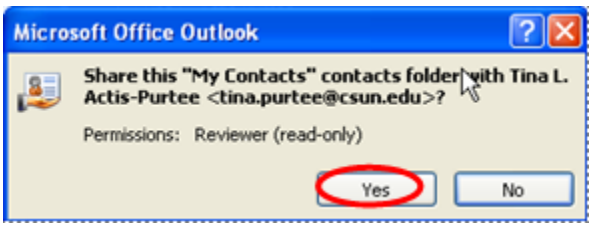
3. In the **To…** field of the **Sharing Invitation…** display window, select the names (see Figure 8, below).

Figure 8 – Sharing Contact Folder Email



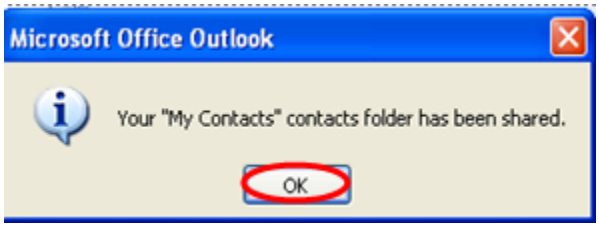
4. Type an appropriate message to the individual.
5. Click the **Send** button.
6. Click the **Yes** to the **Share this "My Contacts" contacts folder with"** (see Figure 9, below).

Figure 9 - New Contact Approval Message



7. Click **OK** to the **Your "My Contacts" contacts folder has been shared** (see Figure 10, below).

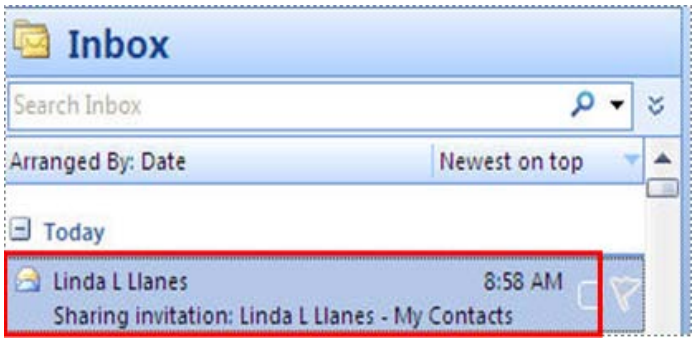
Figure10 - New Contact Acknowledgement Request



Opening a Shared Contacts Folder

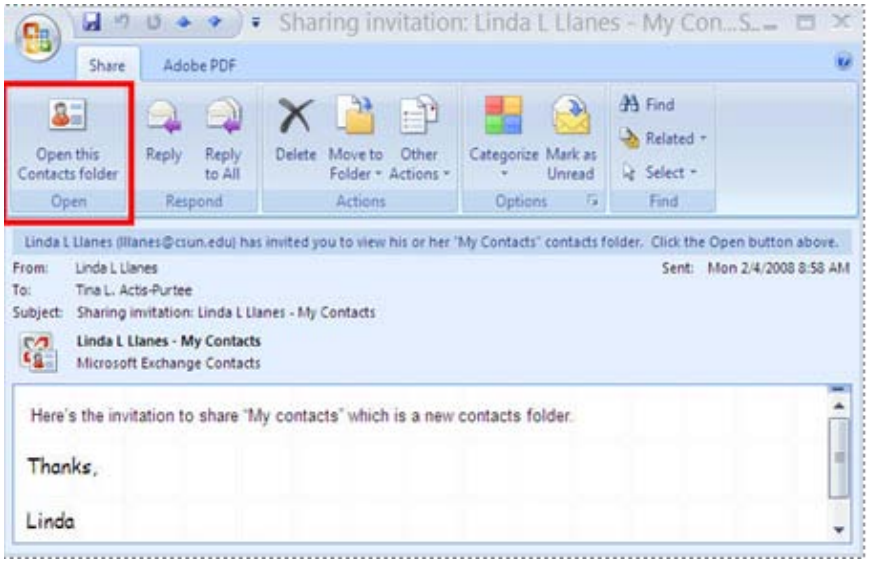
1. The user will receive an email notification that someone has shared their **Contacts Folder** with them. To view a shared folder (see Figure 13, below).

Figure 13 - Contacts – Sharing Invitation Email in User Inbox



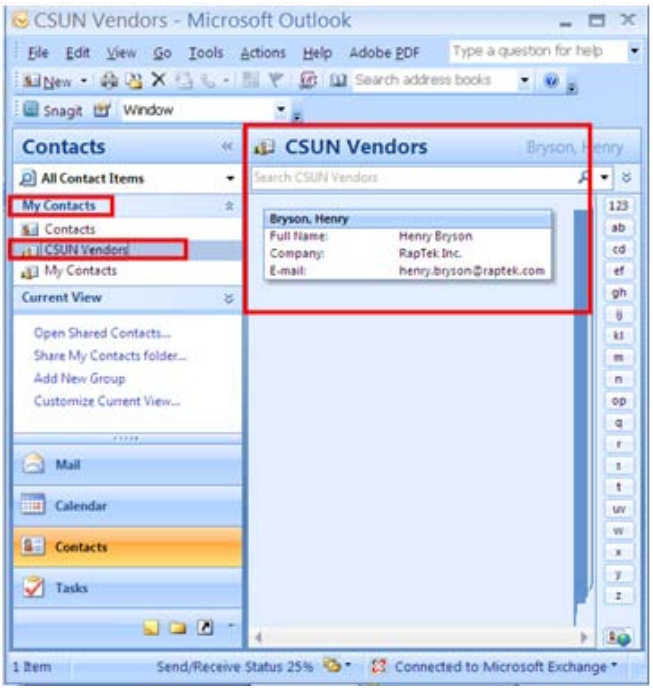
2. Open the email invitation and click the **Open this Contacts folder** icon (see Figure 14, below).

Figure 14 – Open This Contacts Folder Option



3. The folder will appear in the **Contacts Folder - Navigation Pane** under the heading of **My Contacts** (see Figure 15, below).

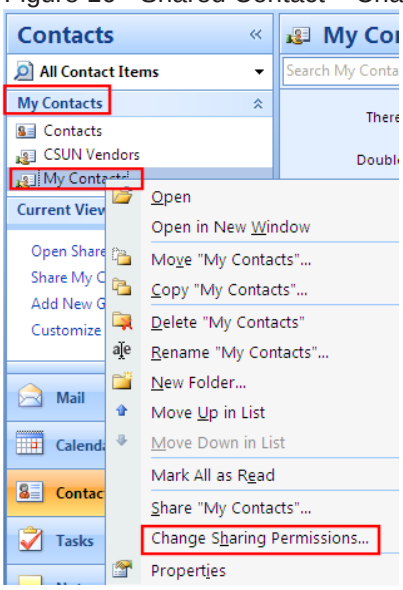
Figure 15 - Viewing Shared Contacts Folder



Removing a Shared Contacts Folder Permissions- Owners

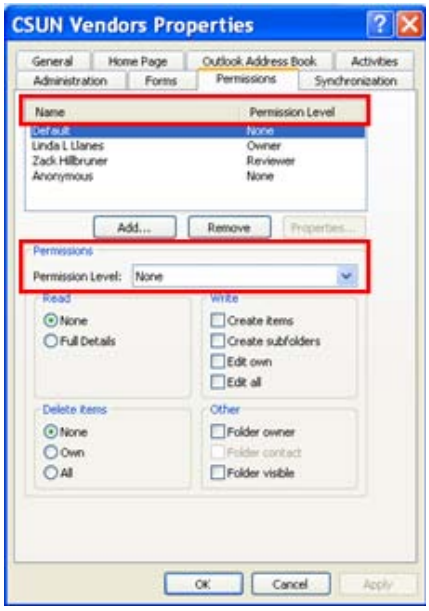
1. Click the **Contacts Folder**.
2. Right-click the folder you want to modify permissions and select **Change Sharing Permissions…** (see Figure 16, right).

Figure 16 - Shared Contact – Change Sharing Permissions



3. Under the **Permissions** tab, in the **Folder Properties** display window, select the name you want to remove sharing permissions from (see Figure 17, below).

Figure 17 - Contacts Folder Properties



4. Click **Remove**.
5. Click **OK**.

Note: You can *temporarily suspend* shared permissions, by change the individual permissions to **None**. This allows you to reinstate permissions easier and faster.

OUTLOOK 2007 TASKS FOLDER

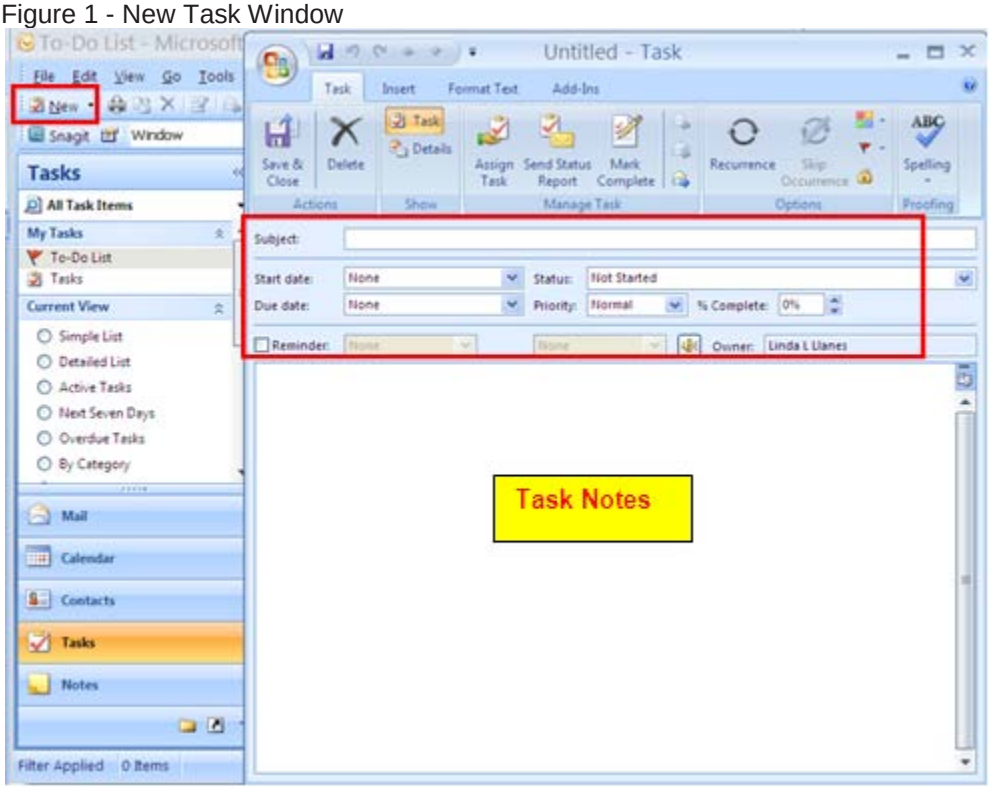
A task is a personal or work-related item you want to track through completion.

- A task can occur once or repeatedly.
- A recurring task can repeat at regular intervals or repeat until the date you mark the task complete. For example, sending status reports on the last Friday of every month, or performing a manual archive on month after the last archive.

Creating a New Task

1. In the **Task Folder**, click the **New** icon on the toolbar to display the **Untitled—Task** display window (see Figure 1, below).

Figure 1 - New Task Window

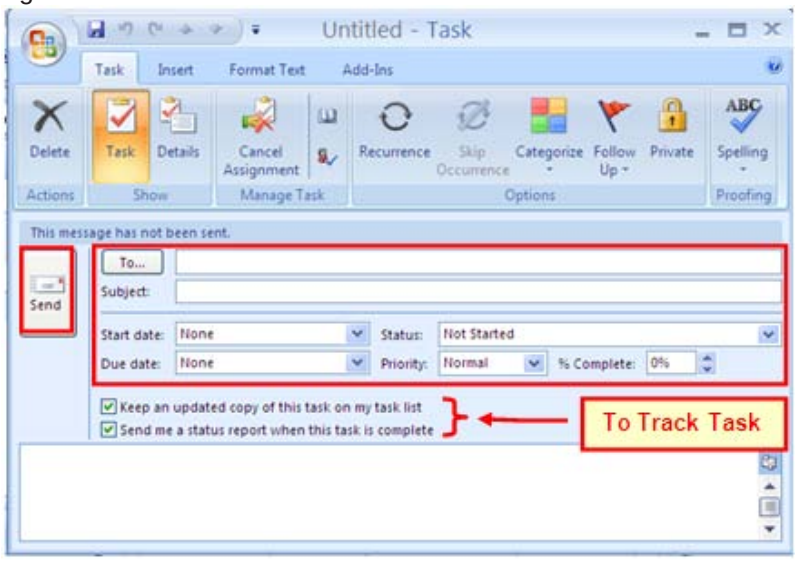


2. Enter **Subject**, **Start date:, Due date:, Status & Priority** information related to the task
3. In the body of the task, type appropriate task notes.
4. Click **Save and Close** button.

Assigning a Task Request

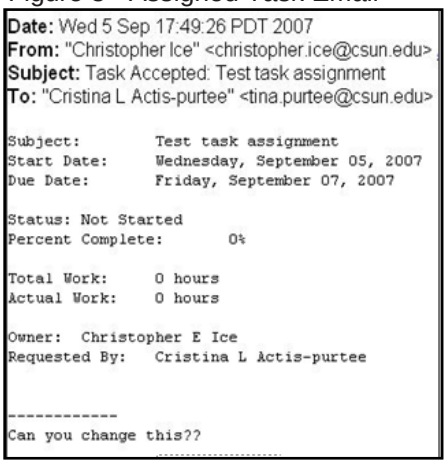
1. On the **Toolbar**, click the **down arrow** on the **New** icon, select **Task Request**.
2. The **Untitled – Task** display window appears (see Figure 2, below).

Figure 2 - New Task Window



3. In the **To…** box select a name from the **GAL**.
4. Populate the **Subject** field, **Due Date** & **Start Date**, set the **Status** & **Priority** using the drop down arrow.
5. In the body of the task, type instructions or information about the task.
6. To track the task, select or clear the **Keep an updated copy of this task on my task list** check box and the **Send me a status report when this task is complete check box**.
7. Click the **Send** button to assign your task.
8. The individual will receive task assignment e-mail. (See Figure 3 below).

Figure 3 - Assigned Task Email



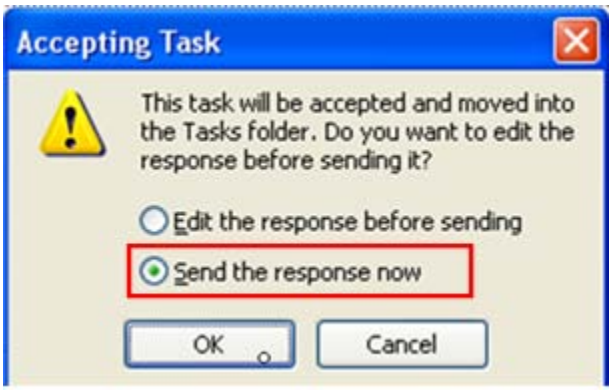
Date: Wed 5 Sep 17:49:26 PDT 2007
From: "Christopher Ice" <christopher.ice@csun.edu>
Subject: Task Accepted: Test task assignment
To: "Cristina L Actis-purtee" <tina.purtee@csun.edu>

```
Subject:        Test task assignment
Start Date:     Wednesday, September 05, 2007
Due Date:       Friday, September 07, 2007

Status: Not Started
Percent Complete:       0%

Total Work:     0 hours
Actual Work:    0 hours

Owner:  Christopher E Ice
Requested By:   Cristina L Actis-purtee


------------
Can you change this??
```

Accepting or Declining a Task Request

1. Open the **Task Request** email
2. Click the **Accept** or **Decline** button.
3. The **Accepting Task** display window appears.
4. Click either **Edit the response before sending** (type your comment in the message, and then click Send), or **Send the response now** (see Figure 4, below).
5. Click **OK**.

Figure 4 - Accepting Task Window

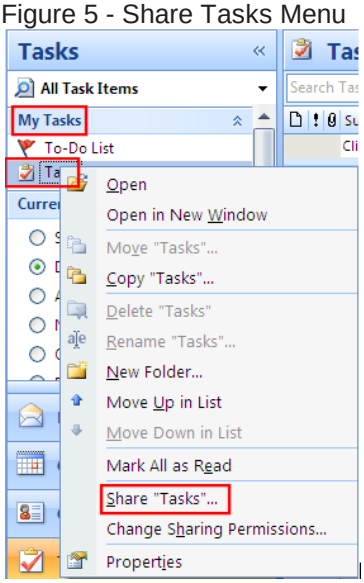


Sharing a Task Folder

This feature requires a Microsoft Exchange Server e-mail account.

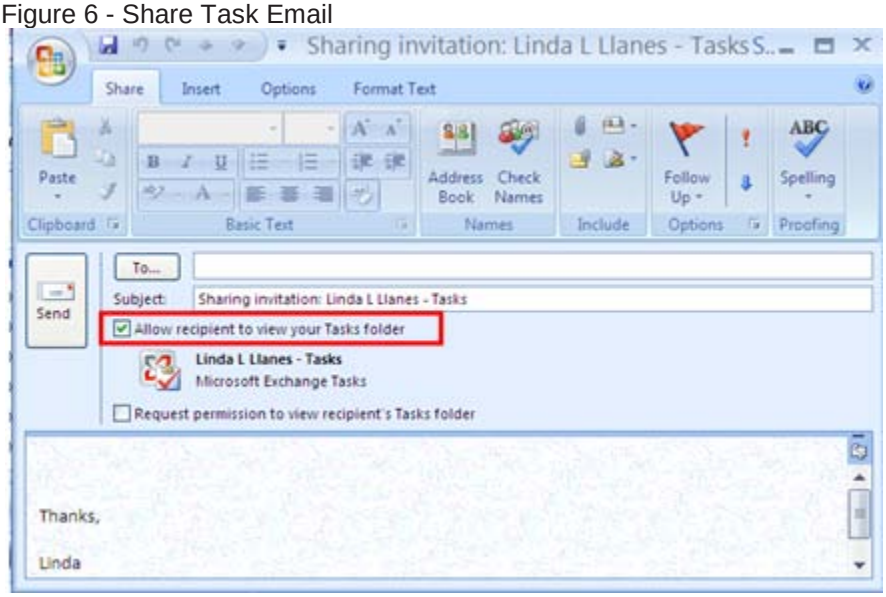
1. Click the **Tasks** button in the Navigation Pane.
2. Under **My Tasks**, **right click** on the **Tasks**.
3. From the drop down menu, click **Share Tasks…** (see Figure 5, below).

Figure 5 - Share Tasks Menu



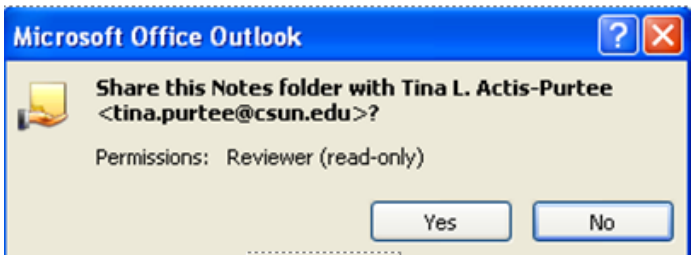
4. The **Sharing invitation: Linda L Llanes – Tasks – Share** display window appears (see Figure 6, below).

Figure 6 - Share Task Email



5. Enter the name in the **To…** field or click the **To…** field to display the **Select Names: Global Address List** display window.
6. Check the **Allow recipient to view your Tasks folder** box
7. Click **Send**.
8. Click **Yes** (see Figure 7, below).

Figure 7 – Verify Share Task Message



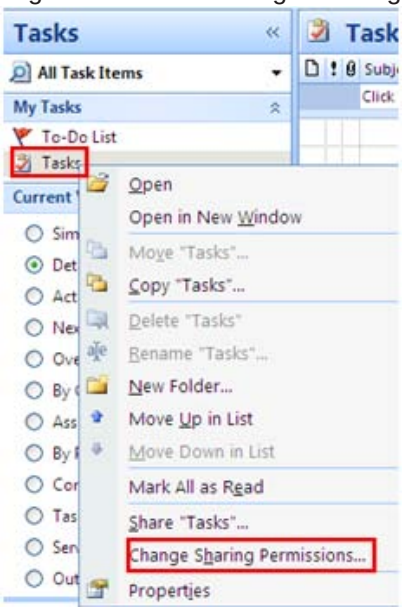
Opening Shared Tasks Folder

1. Click the **Tasks** button in the Navigation Pane.
2. Click **Open Shared Tasks**.
3. Click the **Name** button and select the person's name from the address book.
4. Click **OK**.
5. Click the appropriate **Task Folder** under the **Other Tasks**.

Modifying a Shared Task Folder Permissions

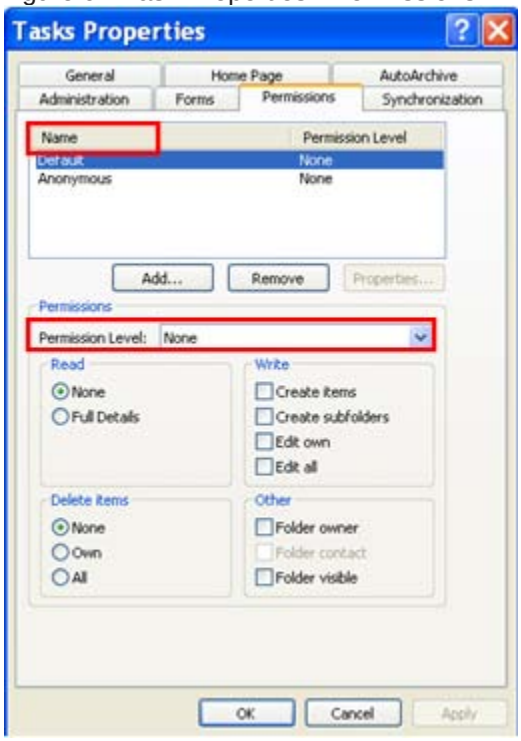
1. To set permissions for a shared **Task** Folder, under **Tasks**, right click on **Tasks**
2. Select **Change Sharing Permissions…** (see Figure 8, below).

Figure 8 - Task - Change Sharing Permissions



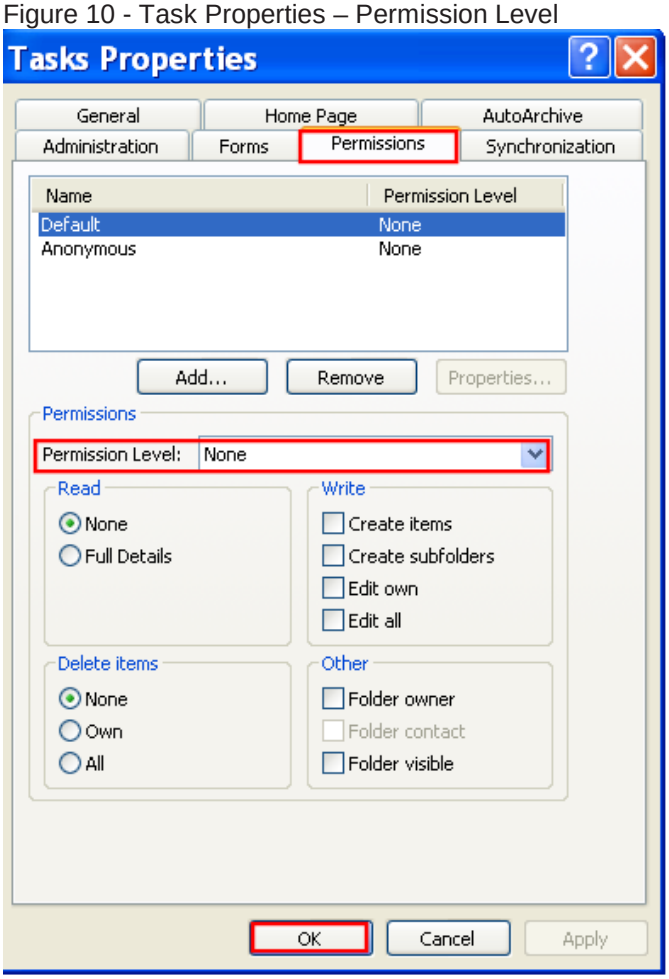
3. The **Task Properties** window appears (see Figure 9, below).

Figure 9 - Task Properties - Permissions



4. In the **Task Properties** display window, under the **Permissions** tab, in the **Name** section, select the name to change Sharing permissions (see Figure 10, below).
7. In the **Permission Level** field use the drop down arrow to select the appropriate permissions. Refer to **Outlook 2007 Folder Permission Levels**, page 66, for permission level descriptions.
8. Right click the **OK** button.

Figure 10 - Task Properties – Permission Level



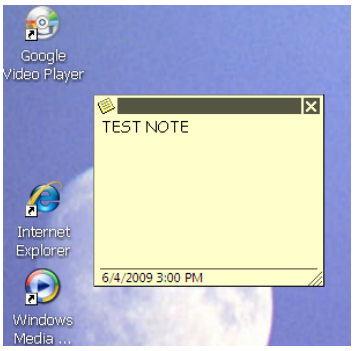
OUTLOOK 2007 NOTES FOLDER

Notes are the electronic equivalent of the paper sticky notes. Use Notes to jot down questions, ideas, reminders, and anything you would write on note paper. You can leave Notes open on the screen while you work. This is especially convenient when you're using Notes for storing bits of information you may need later, such as directions or text you want to reuse in other items or documents.

Creating a Note

1. Click **New** button.
2. Type the text of the note.
3. To close the note, click the **X** in the upper-left corner of the **Note** window, and then click **Close**.
4. Task appears on desktop (see Figure 1, below).

Figure 1 - Note on Desktop

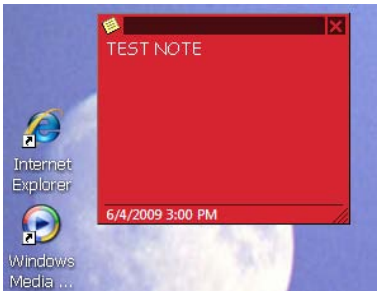


Tip: You can leave the note open while you work. When you change the note, the changes are saved automatically.

Changing a Note's Category

1. Select and **right-click** the Note to change the category.
2. Click **Categorize**.
3. Select and **click** the new category from the drop down list.
4. The note will display the **Category** change (see Figure 2, below).

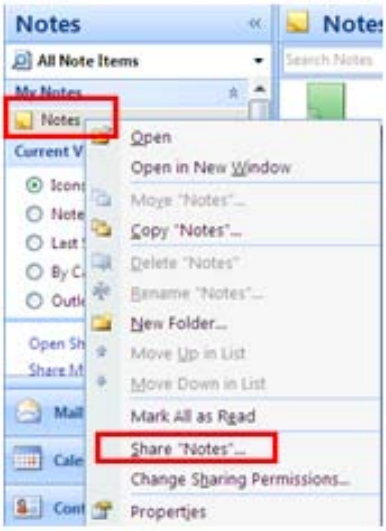
Figure 2 – Change Category



Sharing the Notes Folder

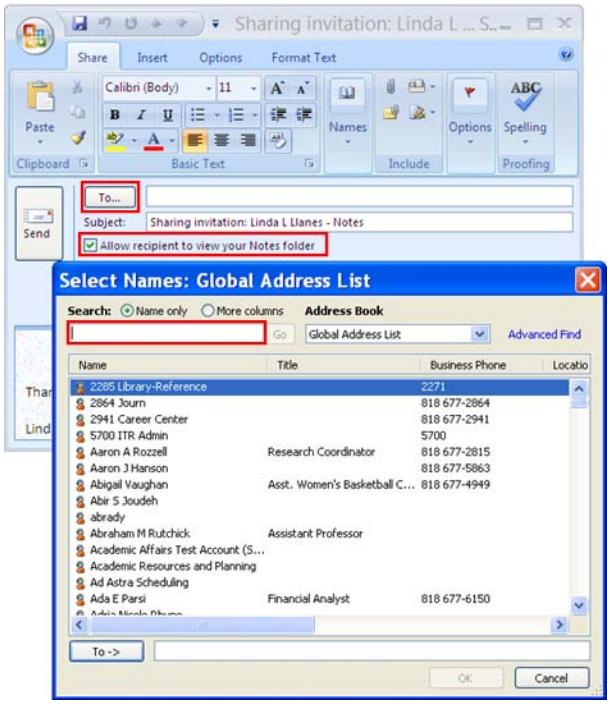
1. Under **My Notes**, right click **Notes**.
2. Select **Share Notes**… (see Figure 3, below).

Figure 3 - Sharing Notes Menu



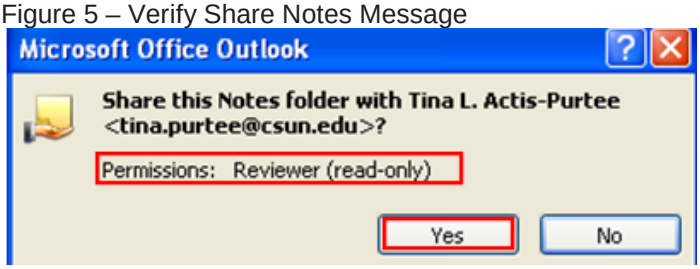
3. In the **Sharing invitation: YOUR NAME – Notes – Share** display window, click the **To…** field
4. The **Select Names: Global Address List** display window appears (see Figure 4, below).

Figure 4 - Sharing Note



5. Enter the name of the person you want to share your Notes with.
6. Select the **Allow recipient to view your Notes Folder**.
7. Click the Send button.
8. Click **Yes** to **Share this Notes folder with Selected Name**. <selectedname@csun.edu>? (see Figure 5, below).

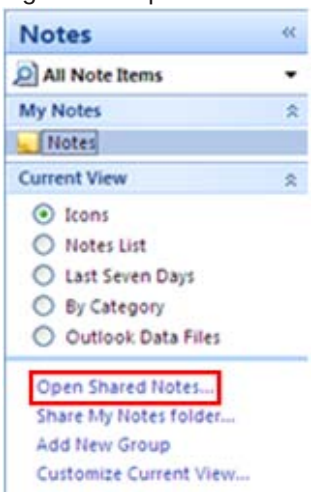
Figure 5 – Verify Share Notes Message



Opening Shared Notes Folder

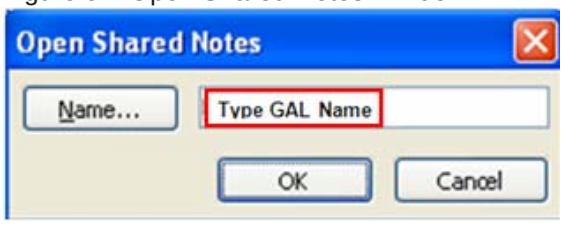
1. Click **Notes** in the Navigation Pane.
2. Click **Open Shared Notes…** (see Figure 8, below).

Figure 8 – Open Shared Notes



3. Click the **Name…** button and select the name of the person who allowed you to see his/her notes (see Figure 9, below).
4. Click **OK**.

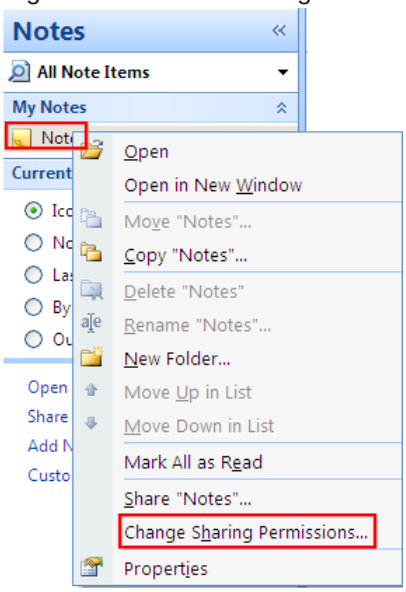
Figure 9 – Open Shared Notes Window



Modifying a Shared Notes Folder Permissions

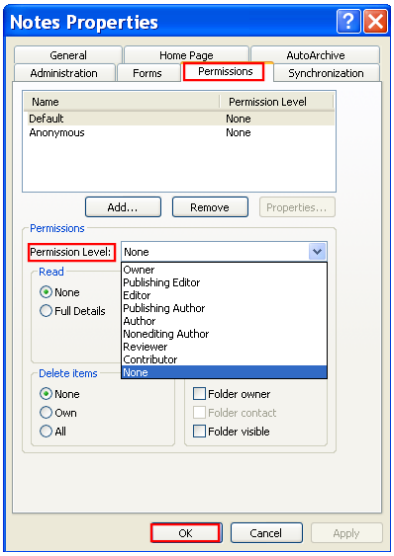
1. To set permissions for a shared **Notes** Folder, under **Notes** right click on **Notes Folder**
2. Select **Change Sharing Permissions…** (see Figure 10, below).

Figure 10 - Notes - Change Sharing Permissions



3. The **Notes Properties** window appears (see Figure 11, below).
4. In the **Notes Properties** display window, under the **Permissions** tab, in the **Name** section, select the name to change Sharing permissions.
5. In the **Permission Level** field use the drop down arrow to select the appropriate permissions. Refer to the **Outlook 2007 Folder Permission Levels,** page 66, for permission level descriptions.
6. Click the **OK** button.

Figure 11 - Notes Properties – Permission Level



OFFICE OUTLOOK WEB ACCESS (OWA)

Office **O**utlook **W**eb **A**ccess, **OWA**, is used to access your Outlook Exchange mailbox from any web-enabled computer using a web browser. Not all Outlook functionality is available using OWA, but the majority of basic functions are there. The recommended browser for accessing OWA is Internet Explorer. Using this browser ensures that you will have access to all of the features that OWA offers.

Internet Explorer Security

When using Internet Explorer as your browser you will need to add the CSUN website to the **Trusted sites** list in Internet Explorer and install an **Active-X** prompt as pop-ups are used by OWA.

1. In **Internet Explorer**, from the '**Tools**' menu select **Internet Option**, and then select the '**Security**' tab.
2. Click on **Trusted Sites**.
3. Click the **Sites** button.
4. The **Internet Options** display window opens (see Figure 1, below).

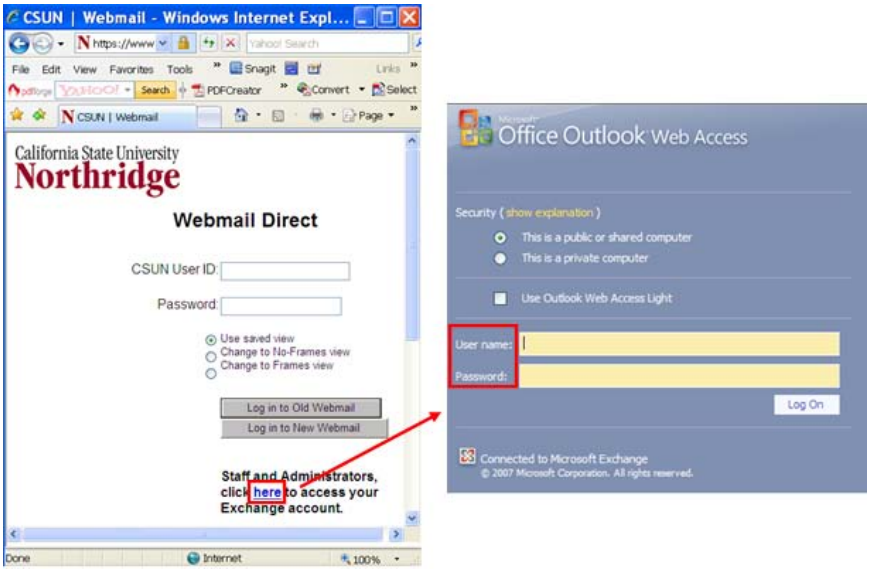
Figure 1 – Internet Options- Trusted Sites

5. Enter the CSUN URL, https://www.csun.edu in the **Add this website to the zone** field.
6. Click the **Add** button.
7. Click **Close**.

Logging in to Outlook Web Access (OWA)

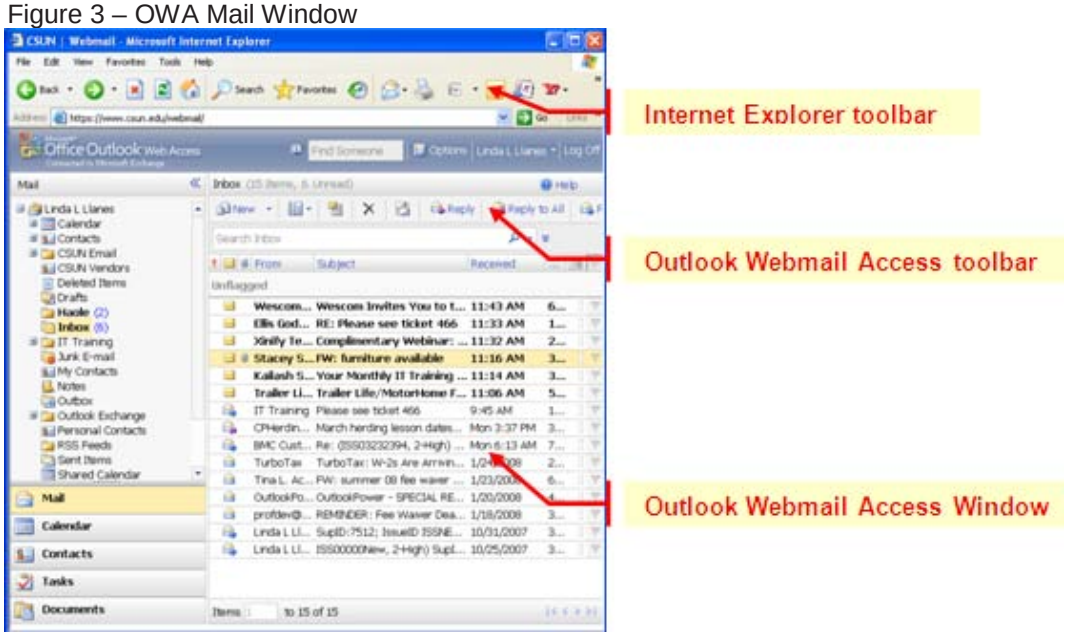
1. From your web browser, type the following URL, **www.csun.edu/webmail**
2. The CSUN **Webmail Direct** page will appear (see Figure 2, below).
3. Outlook Exchange users click the **here** link.
4. The **Office Outlook Web Access** window appears.
5. Login using your CSUN **User ID** and **Password**.

Figure 2 – OWA Login Screen



6. Click the **Log On** button.
7. The **Office Outlook Web Access** window appears (see Figure 3, below).

Figure 3 – OWA Mail Window

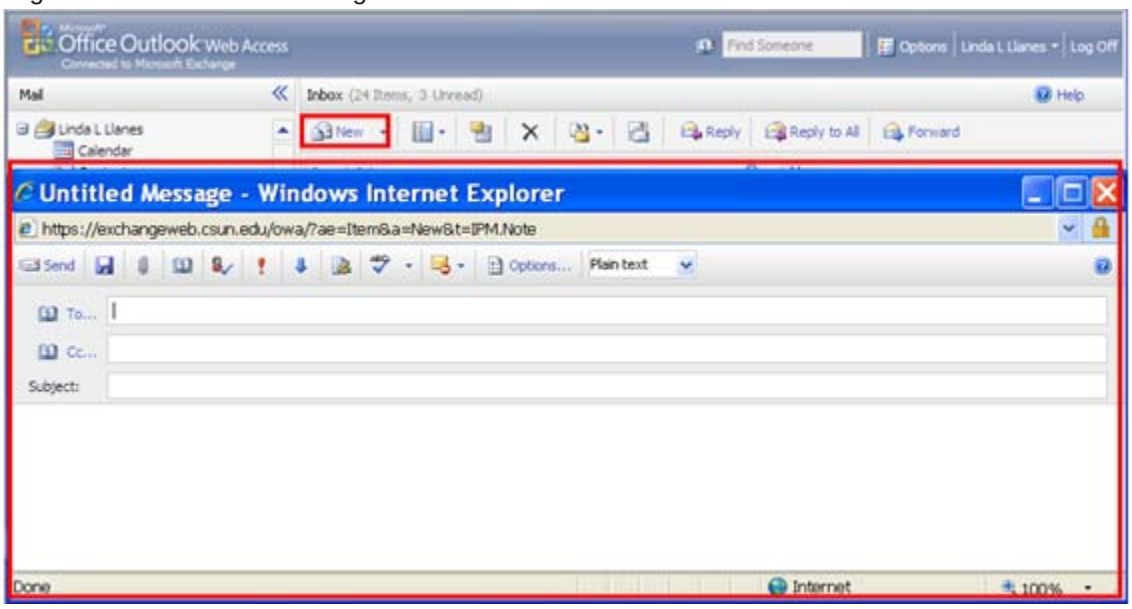


Using the OWA Mail Folder

The OWA Mail window looks and functions similar to the Outlook 2007 client. Notice, that the shortcuts to Calendar and other tasks looks the same as Outlook client.

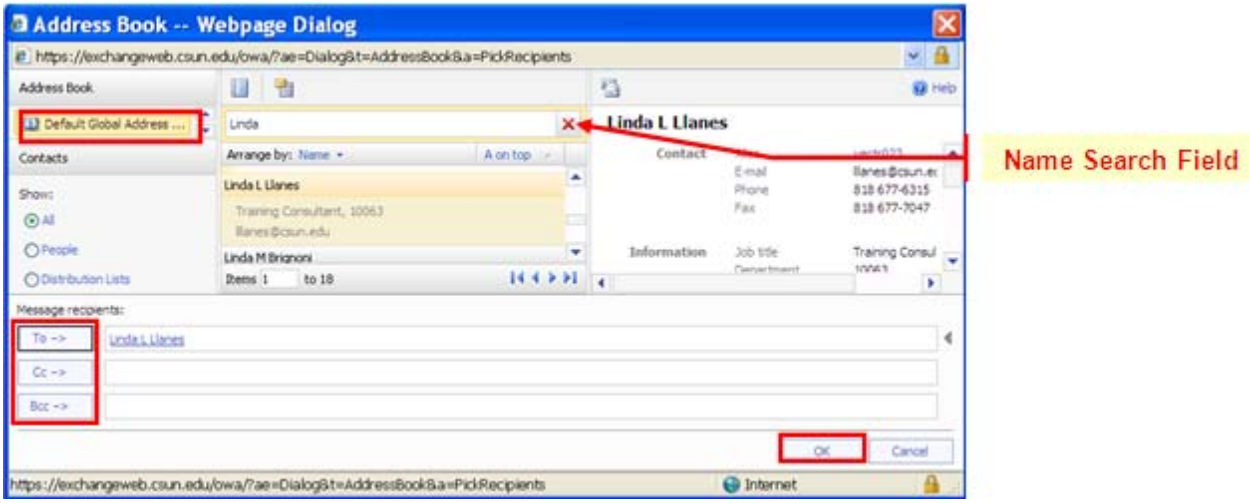
1. To create a new message, click **New** button in the OWA toolbar.
2. The **Untitled Message—Windows Internet Explorer** display window appears (see Figure 4, below).

Figure 4 - OWA Email Message Window



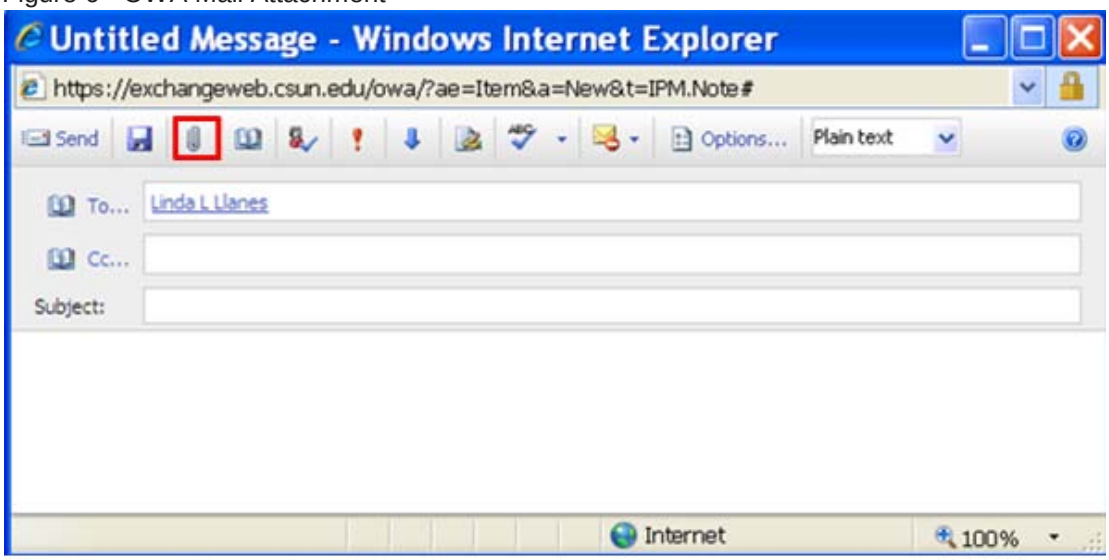
3. Click the **To** button to get the **Address Book – Webpage Dialog** window; the **Global Address List** is the default address book (see Figure 5, below).

Figure 5 - OWA Address Book Window



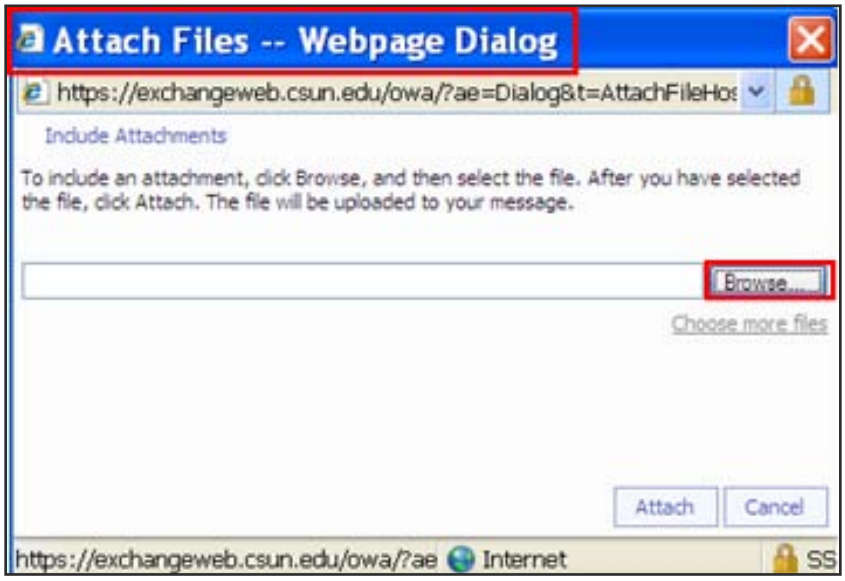
4. The **Default Global Address List** is selected.
5. Type the name in the **Search** field and click the **Search** icon.
6. Select the name and click the **To:**, **Cc:** or **Bcc** field to add the name.
7. Click **OK**.
8. The **Untitled Message...** window reappears with the names selected (see Figure 6, below).

Figure 6 - OWA Mail Attachment



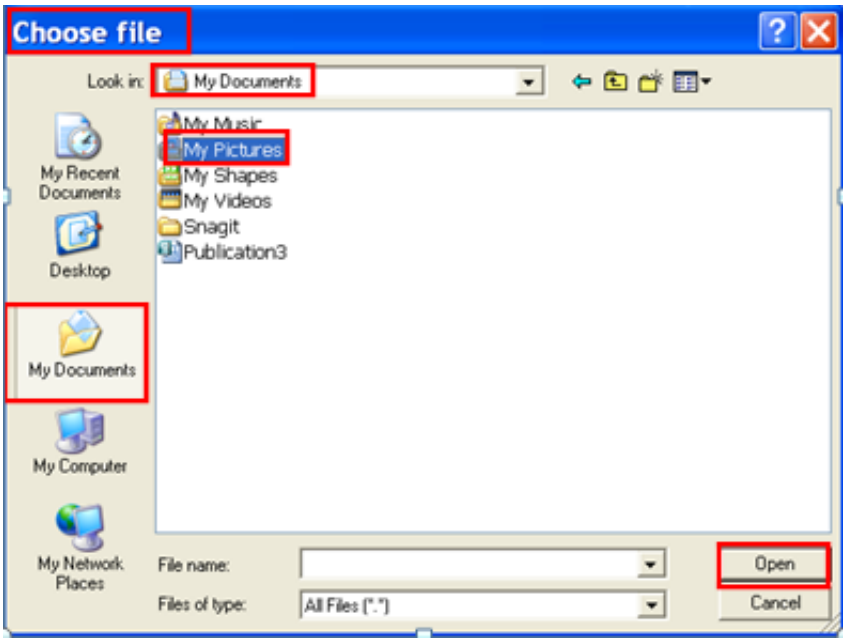
9. Complete **Subject** line and **text** portion of the email.
10. To attach a file, click the **Attach File** icon (see Figure 6, above).
11. The **Attach Files – Webpage Dialog** display window appears (see Figure 7, below).
12. **Click** the **Browse…** button.

Figure 7 - OWA Attach Files and Choose File Window



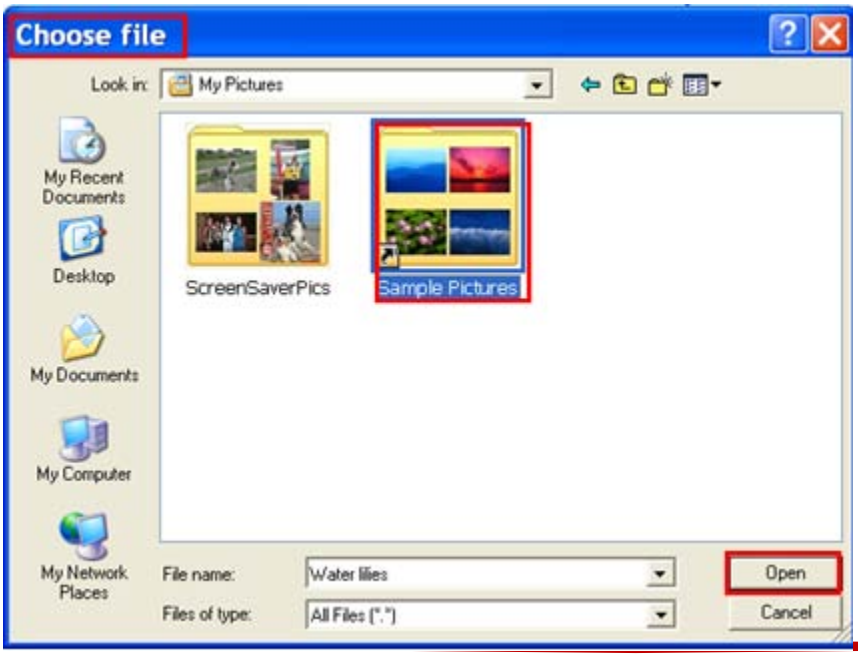
13. The **Choose file** display window appears.
14. Select and **Click** the appropriate icon to populate the **Look in** field (see Figure 8, below).
15. Make the desired **File name:** and **Files of Type:** selection.
16. Click **Open** button.

Figure 8 - Choose File Attachment Window



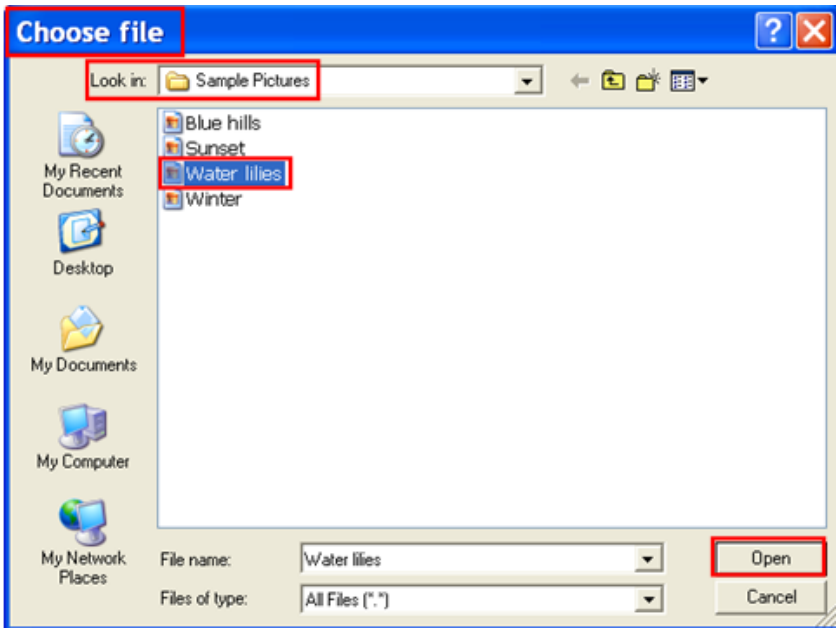
17. The **Choose File** window updates to show available folders, select the desired folder, and **click** the **Open** button (see Figure 9, below).

Figure 9 - Choose File Available Folders



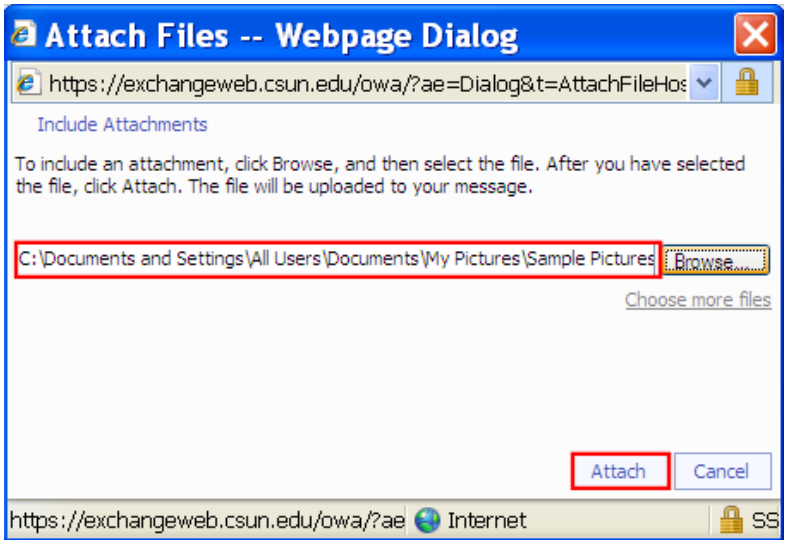
18. The updated **Choose file** display window appears, showing the data files available (see Figure 10, below).

Figure 10 Choose File Window - Selected File



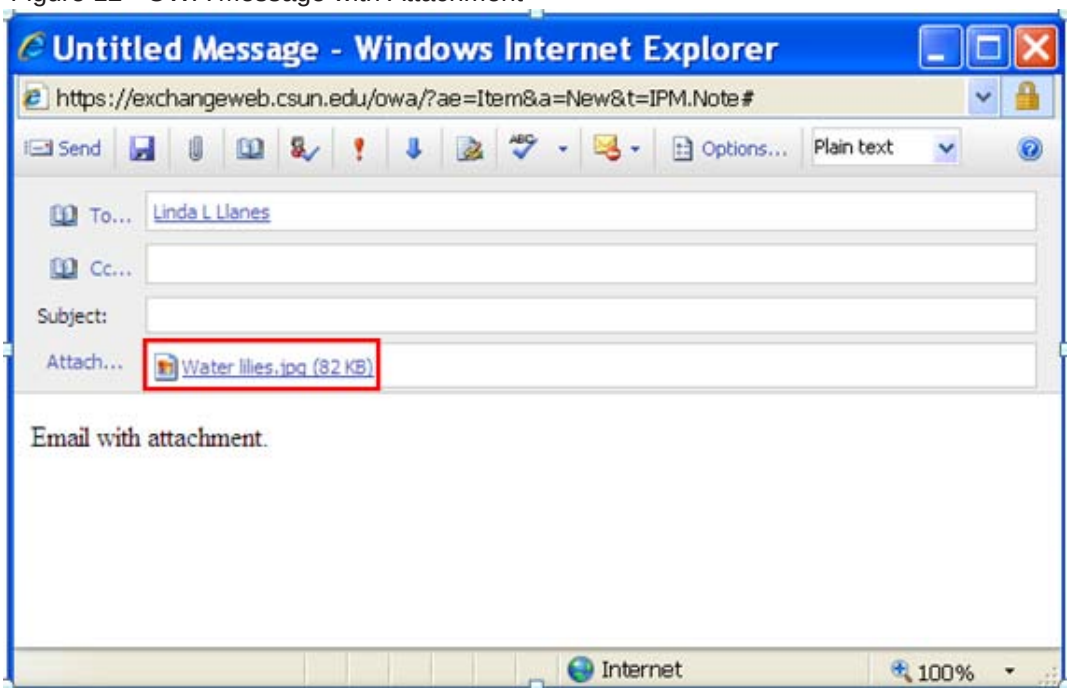
19. Make the desired selection to populate the **File name** and **Files of type:** fields.
20. Click **Open**.
21. The **Attach Files – Webpage Dialog** display window reappears showing the correct path of the file selected in the **Browse** field (see Figure 11, below).
22. Click the **Attach** button.

Figure 11 - Attachment Path



23. The file name will appear in the **Untitled Message** display window in the **Attach…** field (see Figure 12).
24. Complete the mail message.
25. Click the **Send** button.

Figure 12 - OWA Message with Attachment

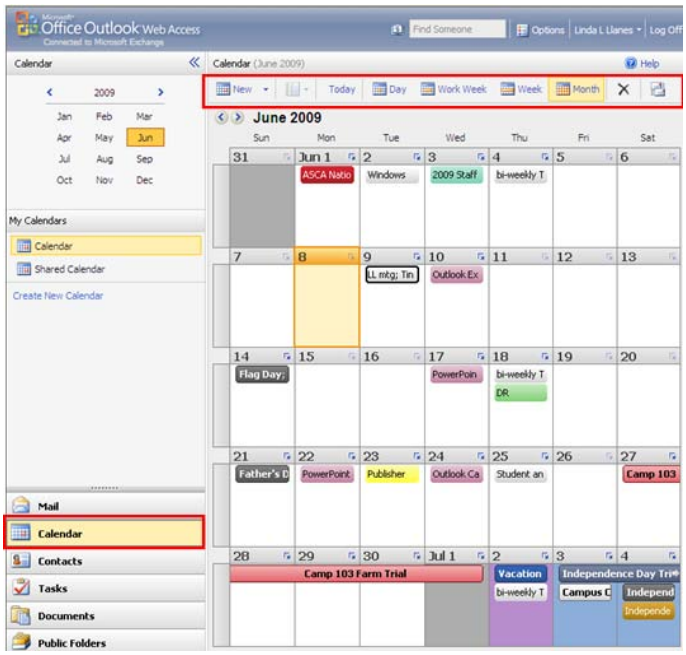


Using OWA Calendar Folder

The **OWA Calendar Folder** has many of the same options as the Outlook 2007 client calendar. You can view and create appointments and meetings as well as utilize the scheduling assistant options, the same way when using the client.

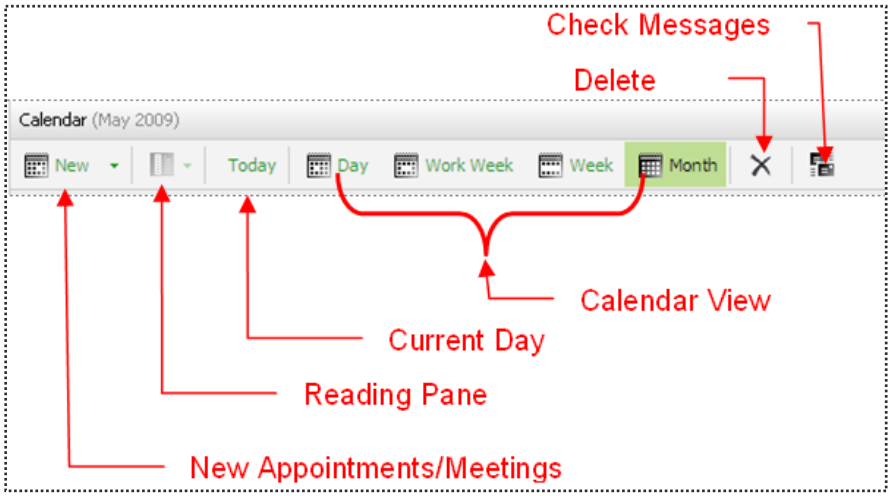
1. Click the **Calendar** link to display the OWA calendar window (see Figure 13, below).

Figure 13 - OWA Calendar Window



2. The calendar toolbar provides the same options available on the client (see Figure 14, below).

Figure 14 - OWA Calendar Toolbar

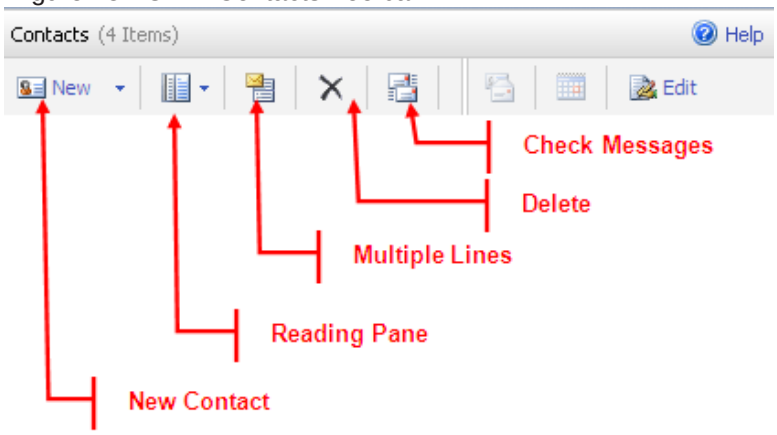


Using OWA Contacts Folder

The **OWA Contacts** toolbar (see Figure 15, below) allows you to access your **Contacts** list to view, add and modify contacts. If you are saving your contacts in a **Personal Address Book** and not in **Contacts**, you *will not* be able to view them using OWA. These are saved to your C: drive of your computer and not the server.

- To print contact information the contact must be opened.
- To open a contact, double-click on the contact name.

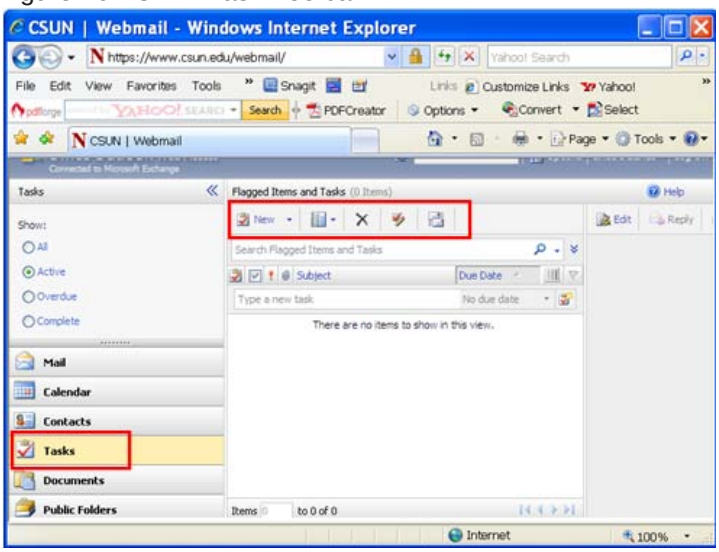
Figure 15 - OWA Contacts Toolbar



Using OWA Tasks Folder

The OWA **Tasks Folder** provides access to your Outlook Tasks folder. In the OWA version of the **Tasks** Folder you can only assign a task to yourself and view any other tasks already created. (see Figure 16, below).

Figure 16 - OWA Task Toolbar



OUTLOOK 2007 FOLDER PERMISSION LEVELS

Permission Level / Role	Permissions Granted by Owner
Owner **	Create, read, modify, and delete items (An item is the basic element that holds information in Outlook (similar to a file in other programs). Items include messages, appointments, contacts, tasks, journal entries, notes, etc.) and files/subfolders. An owner can give/modify the permission levels for a folder.
Publishing Editor**	Create, read, modify, and delete all items, files, and subfolders
Editor	Create, read, modify, and delete all items and files.
Publishing Author	Create and read items and files, create subfolders, and modify and delete items and files they create.
Author	Create and read items and files, and modify and delete items and files they create.
Contributor **	Create items and files only. The contents of the folder do not appear.
Reviewer	Read items and files only.
Custom**	Perform activities defined by the folder owner.
None	No permissions to access Outlook items.

**Does not apply to delegates

Note: With **Author** or **Editor** permissions, a delegate has send-on-behalf-of permission. Sent messages contain both the manager's and delegate's names. Message recipients see the manager's name in the **Sent On Behalf Of** box and the delegate's name in the **From** box.

NOTES

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