



InformationTechnology

COMPUTING SERVICES AND SYSTEMS DEVELOPMENT



Faculty and Staff Development Program

Welcome

Microsoft Outlook 2013 Fundamentals Workshop



Computing Services and Systems Development
Phone: 412-624-HELP (4357)
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Microsoft Outlook 2013 Workshop

Overview

This manual will help you learn many Microsoft Outlook features such as email options, inbox, contacts, calendar, and tasks. Topics include window options, email formatting, keeping email organized, entering contact information, scheduling individual appointments and group meetings, and tracking personal and group tasks.

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I. Introduction

Microsoft Outlook is a desktop information management program that helps you organize and share information on your desktop and communicate with other people. You can use Outlook for both personal and group activities such as e-mail, appointments, contacts and sharing information. The table below consists of the standard components in Outlook.

A. Outlook Components

Component		Description
	Mail	Displays mailbox folders and email list. Also, allows you to send and receive email messages.
	Calendar	Provides personal, group and resource scheduling.
	People	Displays contact names, addresses, email and other information.
	Tasks	Organizes personal and group to-do lists.
	Notes	Contains miscellaneous notes or copied text that you want to use in other places.
	Folder List	Displays all mailbox folders.
	Shortcuts	Displays and provides quick access to mail folders.

1. Select each of the Outlook Components to view their screen layouts.

You can add or remove Outlook Components on the Navigation pane.

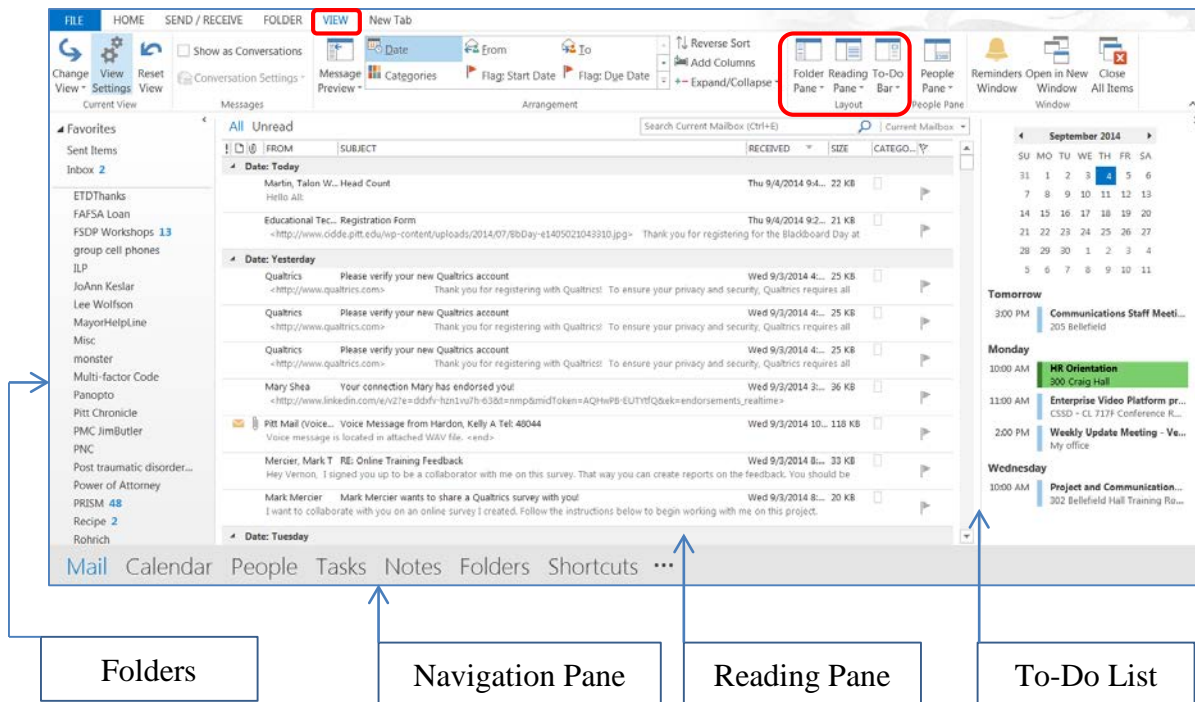


1. Click on the Navigation Options dots (...) to **add or remove options** from the shortcut menu bar.

B. View Options

While in your Inbox, as well as other Outlook components, there are various screen views, which may help you in viewing mail messages and generally working with Outlook. On the inbox email screen, there are various view options for your Reading Pane. Also, you can choose to view or close the Navigation and To-Do List Panes on your screen as well.

1. Change your email screen view.



1. Click on the **View** tab, then on the **Layout** group, select your view options for **Navigation Pane, Reading Pane, and To-Do List**.

When selecting the **Navigation** and **To-Do List Panes**, you can choose the **Normal** view (see above), **Minimized** on screen or **Off** which removes from screen.

When selecting the **Reading Pane**, you can choose the **Right** or **Bottom** options to have the message preview to the right or bottom of the selected email line. Also, you can select the **Off** option (see above), message preview will not appear.

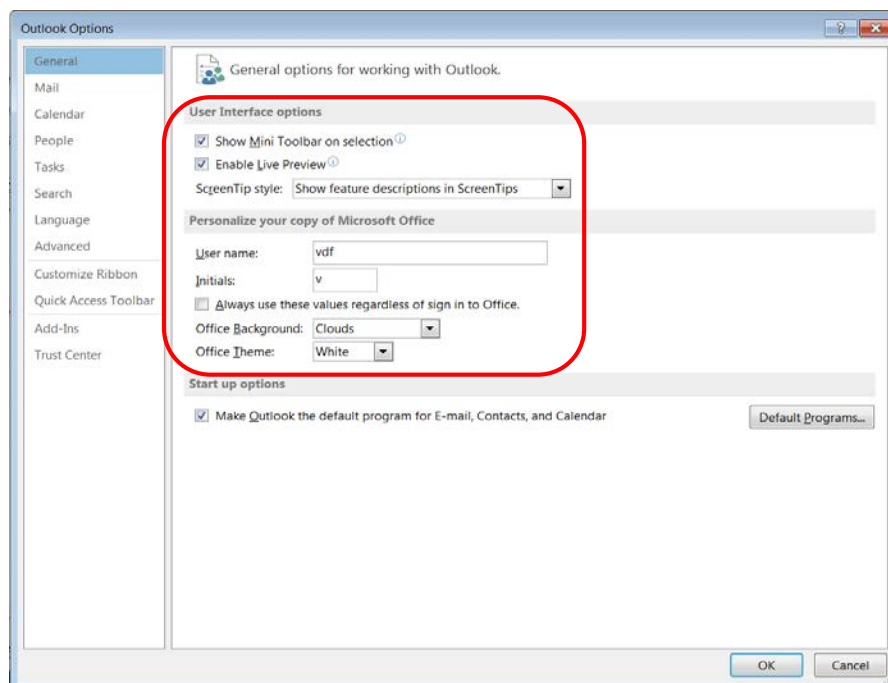
II. Outlook Options

Microsoft Outlook has many settings and feature options to help with your business and administrative tasks.

A. General

General options enable you to select user interface and start up options to personalizing your copy of Microsoft Office. Many of your User Interface options are defaulted, but you can disable or select other options. (This section will be instructor led.)

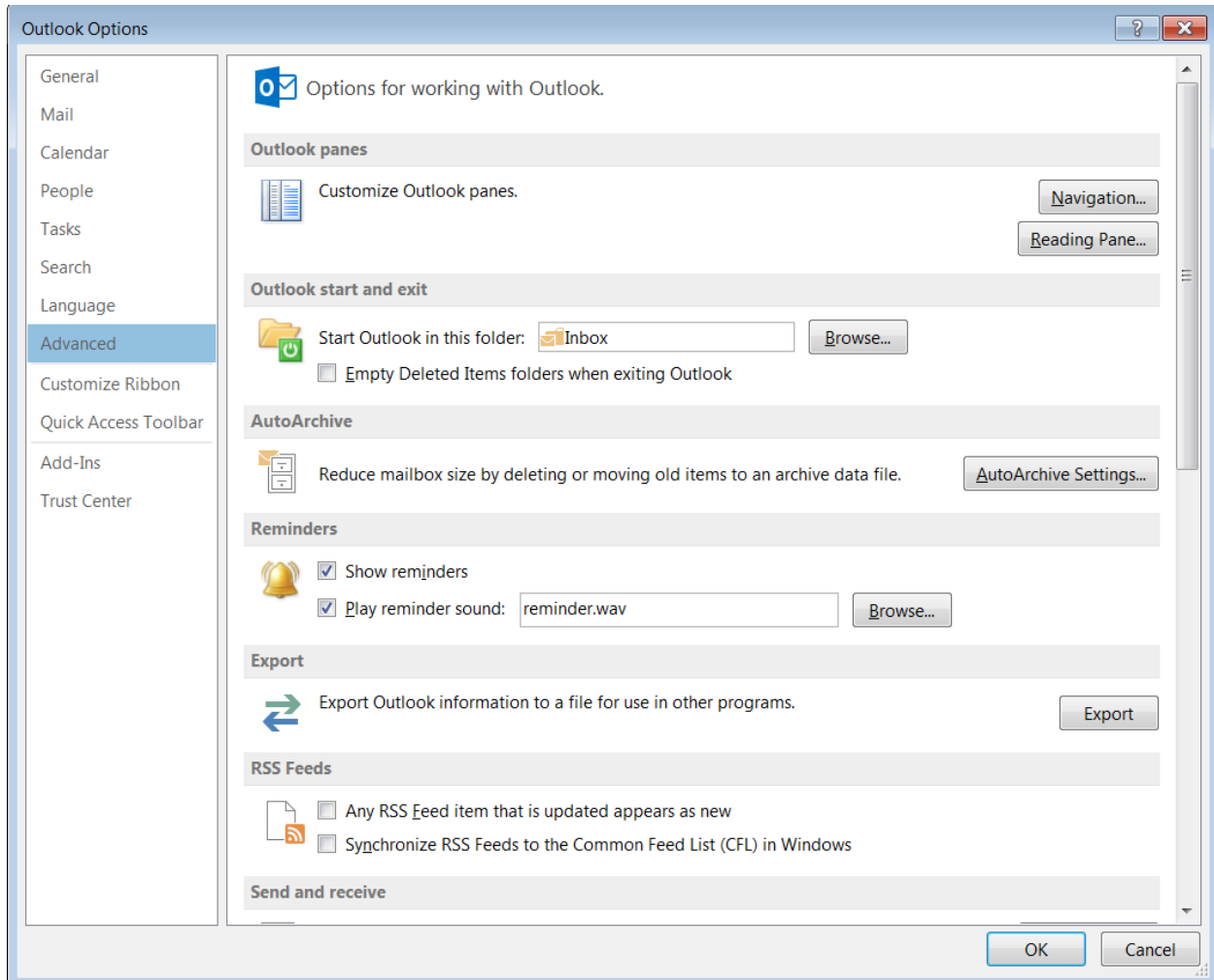
1. Click on the **File** tab, and then click on **Options**.
2. The **Outlook Options** window will appear.



B. Advanced

The Advance option enables you to customize work panes and set up options for multiple Outlook features. Many of your Advanced options are defaulted, but you can disable or select other options. (This section will be instructor led.)

1. Click the on **File** tab, and then select the **Options** icon.
2. The **Outlook Options** window will appear.



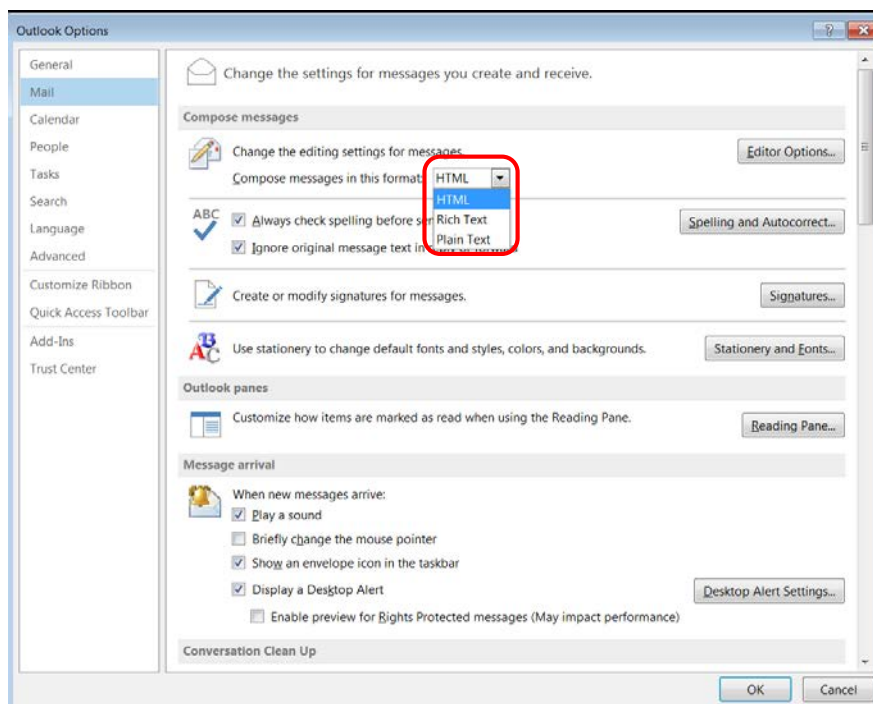
3. Click on the **Mail** option, and then select **Advanced**.

III. Format Email

Outlook provides the ability to setup and change format for your messages, stationery, and signatures.

A. Select Message Format

4. Click on the **File** tab, and then select the **Options** icon.
5. The **Outlook Options** window will appear, and then select **Mail**.

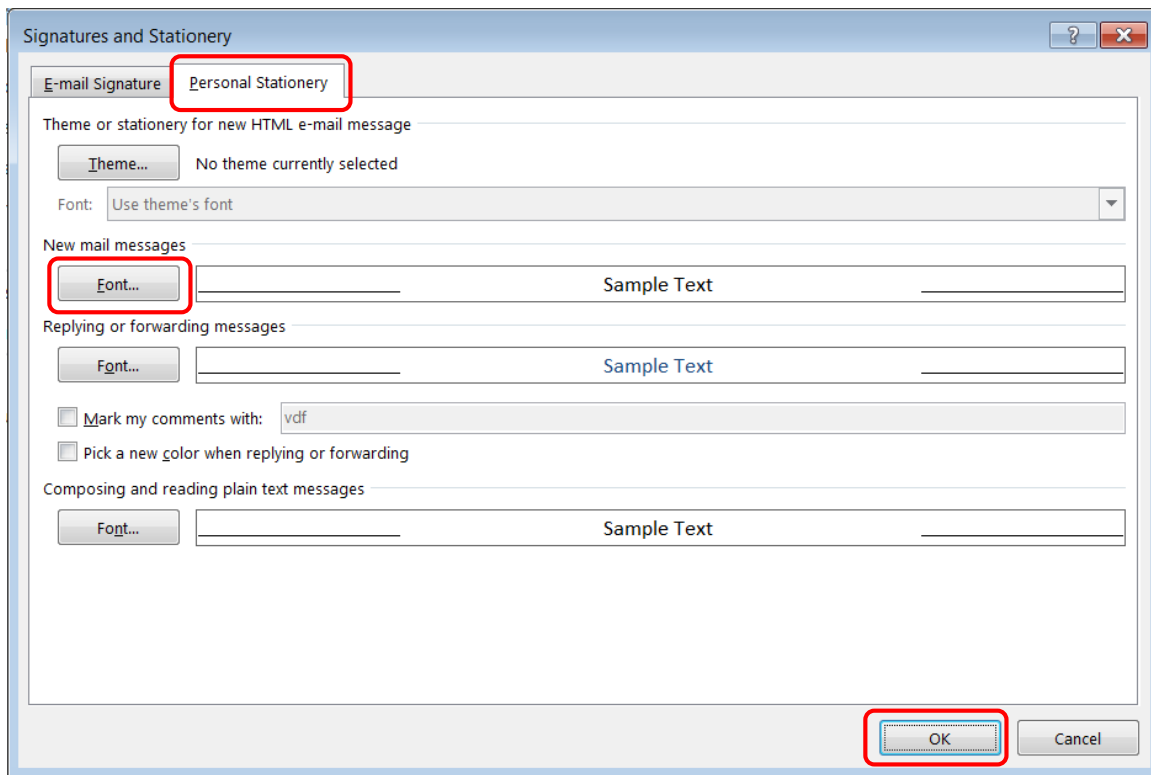


6. In the **Compose message** selection, click the drop-down arrow next to the **Compose in this message format** box.
7. Select one of the three formatting options:
 - HTML
 - Rich Text
 - Plain Text

Format	Description
HTML	Default format in Outlook. Support various fonts, colors, bullet lists, and pictures.
Rich Text	Support Microsoft Exchange Client 4.0 and 5.0 and all Microsoft Outlook versions.
Plain Text	Don't support bold, italic, colored fonts, or other text formatting and pictures.

B. Default Font

1. Click on the **File** tab, and then select the **Options** icon.
2. The **Outlook Options** window will appear, and then select **Mail**.
3. In the **Compose message** selection, click on the **Stationery and Fonts** button.
4. The **Signature and Stationery** window will appear.

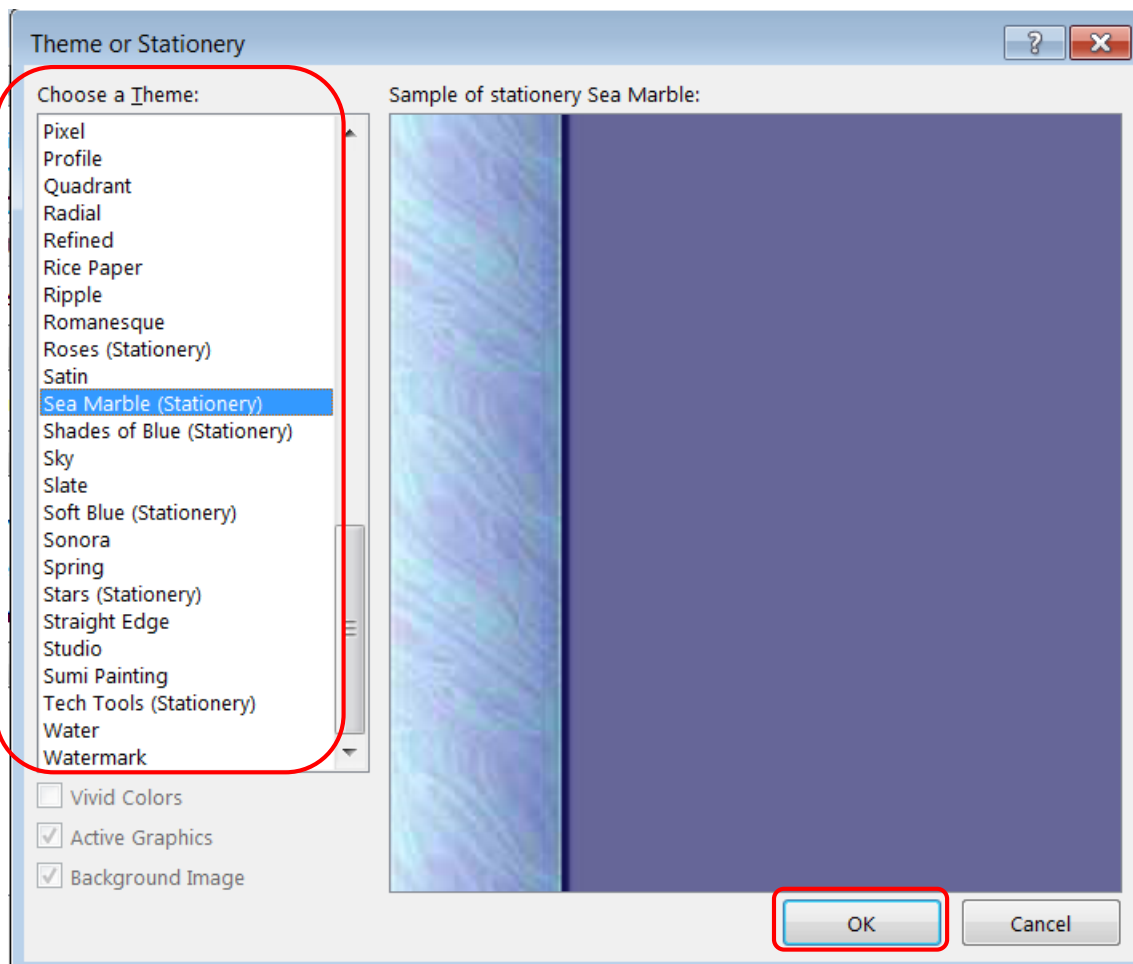


5. Select the **Personal Stationery** tab.
6. Click on the **Font** button, in the **New mail messages** section to change your desired font.
7. Click on the **OK** button.
8. You can also change your font in the **Replying or forwarding messages** section.

C. Using Stationery

Outlook stationery gives the email messages you send a special appearance, with colorful backgrounds and coordinated fonts. Recipients with **Plain Text** format are unable to see colorful backgrounds and formatted font types.

1. Click on the **File** tab, and then select the **Options** icon.
2. The **Outlook Options** window will appear, and then click on the **Stationery and Fonts** button.
3. The **Signature and Stationery** window will appear.
4. Select the **Personal Stationery** tab.
5. In the **Theme or Stationery for new HTML e-mail message** section, click on the **Theme** button.
6. The **Theme or Stationery** window will appear.

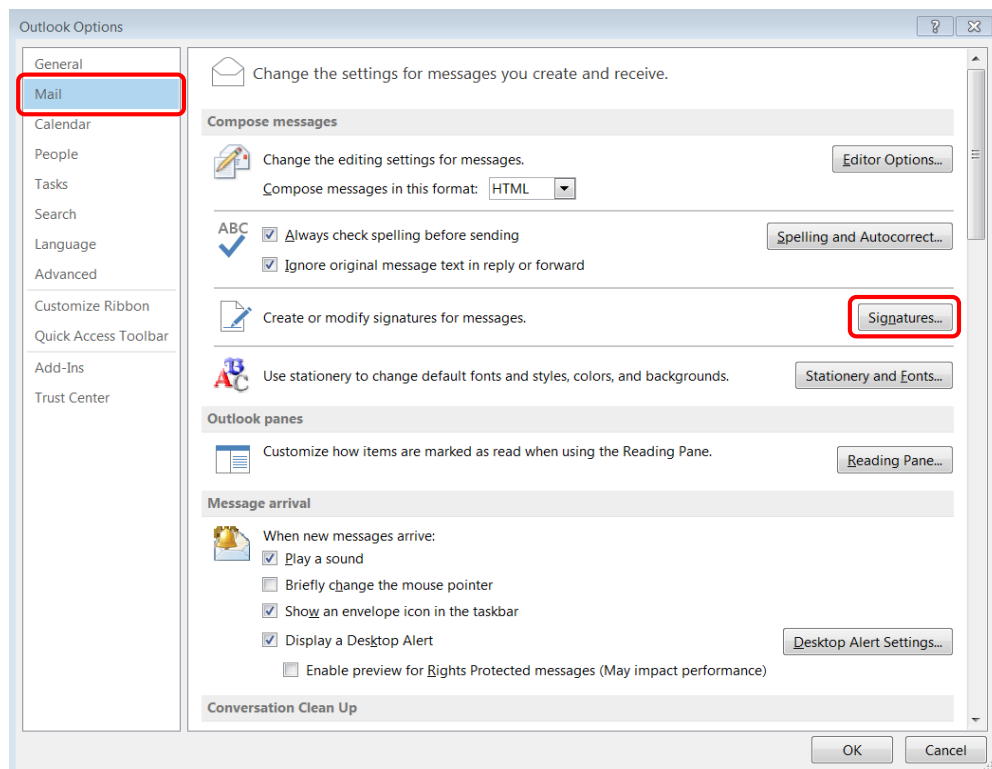


7. In the **Choose a Theme** section, choose your desired theme (Once a Themes is selected it will appear on the right-side of your screen in the **Sample of stationery** window).
8. Click on the **OK** button. (Outlook will automatically use the stationery you selected in new email messages.)

D. Signatures Files

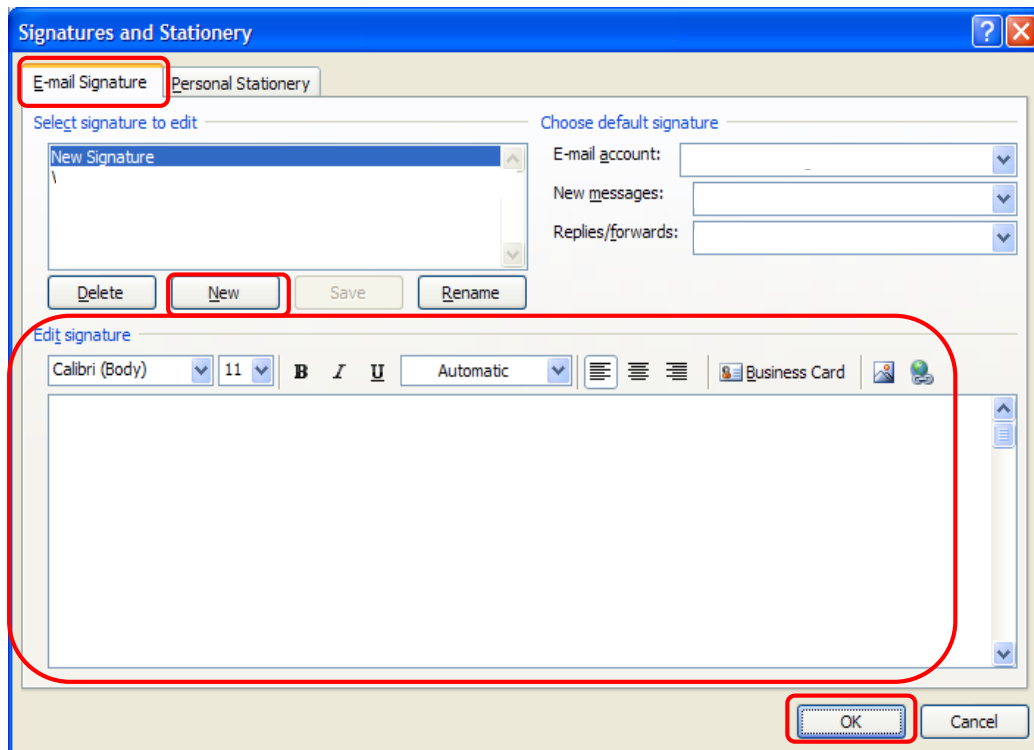
You can use the signatures option to automatically add text to the messages you send. For example, you can create a signature that includes your name, job title, and phone number. You can create multiple signatures, designate a default signature, and select a signature to insert in a message after you have created the message.

1. Click on the **File** tab, and then click on the **Options** icon.
2. The **Outlook Options** window will appear, and then select **Mail**.

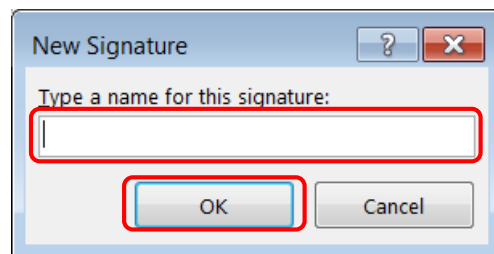


3. In the **Compose messages** section, click on the **Signature** button.

4. The **Signature and Stationery** window will appear.



5. With the **E-mail Signature** tab selected, click on the **New** button.
6. The **New Signature** window will appear.

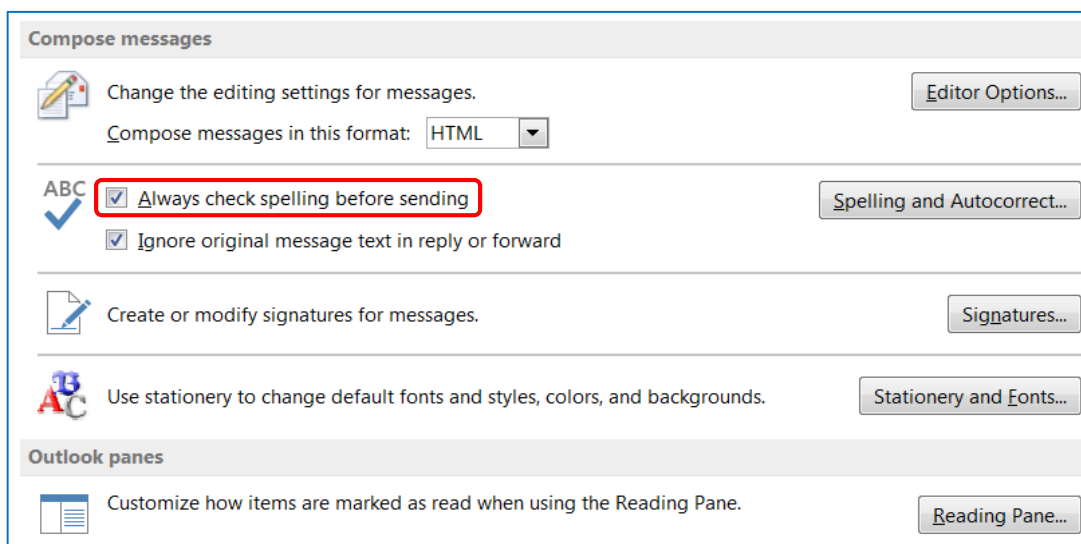


7. In the **Type a name for this signature** box, type your desired signature filename.
8. Click on the **OK** button.
9. The filename will appear in the **Select signature to edit** window, then type your signature text in the **Edit signature** window, and then click on the **OK** button.

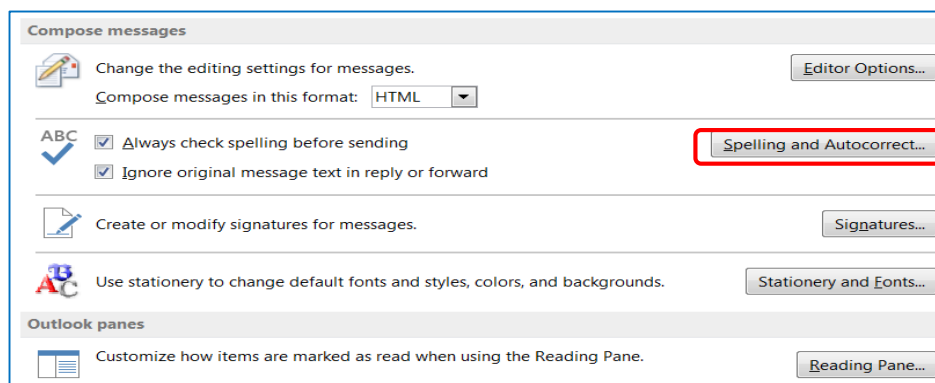
E. Check Spelling and Autocorrect

The Check Spelling is a Microsoft feature that checks your spelling as you type text by place a red wavy line underline the misspelling, so you can correct the text before sending email. Also the Autocorrect feature will correct your commonly misspelled words automatically.

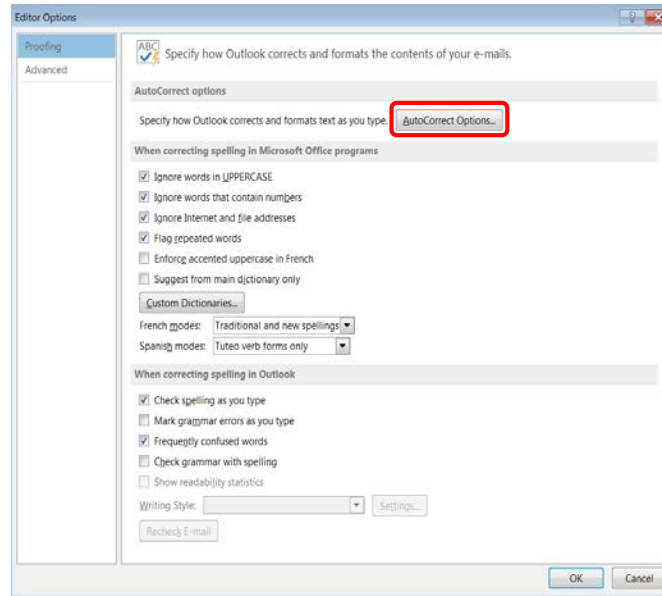
1. Click on the **File** tab, and then click on the **Options** icon.
2. The **Outlook Options** window will appear, and then select **Mail**.



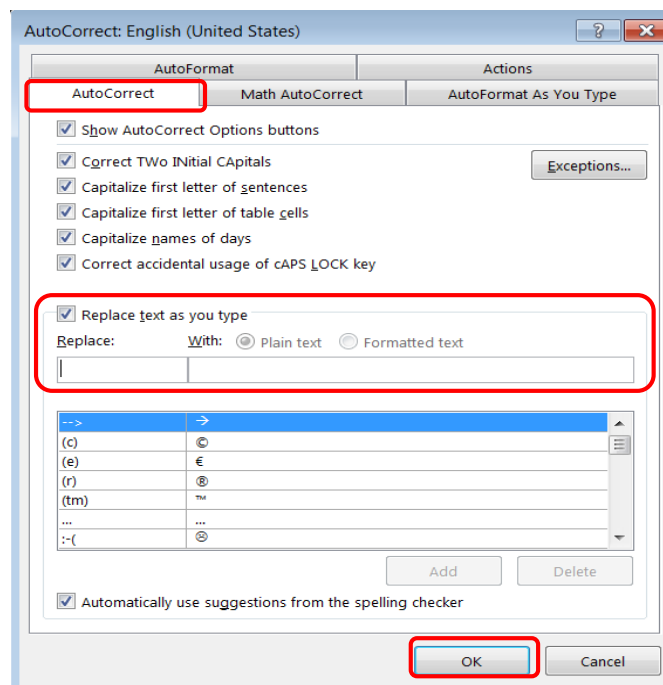
3. In the **Compose messages** section, click on the box next to **Always check spelling before sending**.



4. Click on the **Spelling and AutoCorrection** button, for additional options.
5. The **Editor Options** window will appear.



6. Click on the **AutoCorrect Options** button.
7. The **AutoCorrect: English (U.S.)** window will appear.



8. With the **AutoCorrect** tab select, click on the **check box** next to **Replace text as you type**.
9. In the **Replace** box, type the misspelling of the word you commonly misspell, and then in the **With** box, type the correct word spelling.
10. Click on the **Add** button.

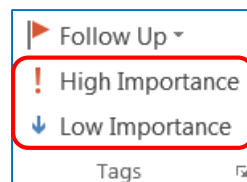
IV. Mail Options

Outlook provides options that enable you to mark any message with priority status or sensitivity rating, so your words cannot be changed by anyone after the message is sent.

A. Set Importance Level

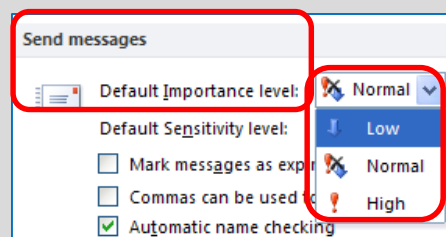
The Default Importance Level is set at Normal. When composing a message you can set the Importance Level to High or Low.

1. The Importance Level options are located on the **Message** ribbon in the **Tags** group.



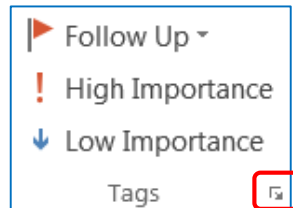
2. Click on the **High or Low Importance** button, to indicate the message importance.

Note: You can mark all messages you send with the same importance level. Click on the **File** tab, then click on the **Options** icon, and then select **Mail**. In the **Send messages** section, select your **Default Importance Level**.

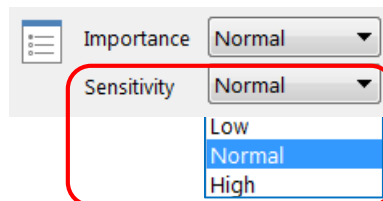


B. Set Sensitivity Level

The Default Sensitivity Level is set at Normal. When composing a message you can set the Sensitivity Level to Private, Personal or Confidential.

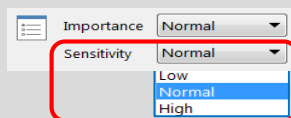


1. In the **Tags** group, click on the dialog box. The **Properties** window will appear.



2. Go to the **Settings** section, and set your desired sensitivity level.

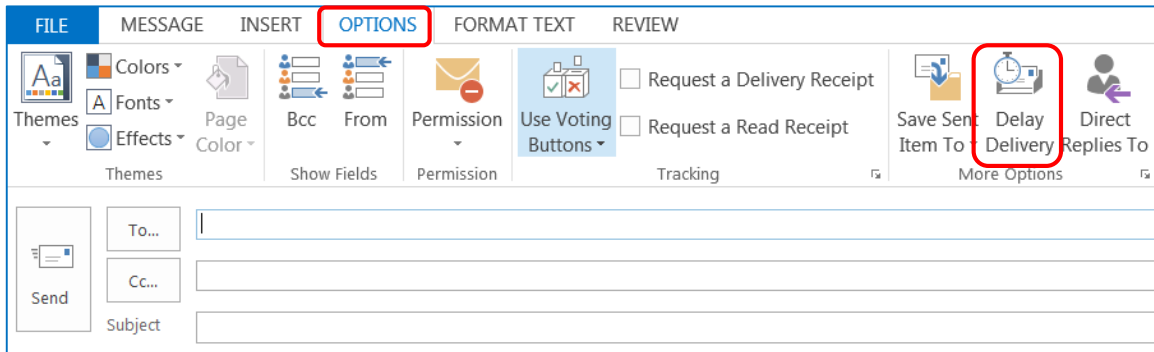
Note: You can mark all messages you send with the same Sensitivity Level. Click on the **File** tab, then click on the **Options** icon, and select the **Mail**. In the **Send messages** section, select your **Default Sensitivity Level**.



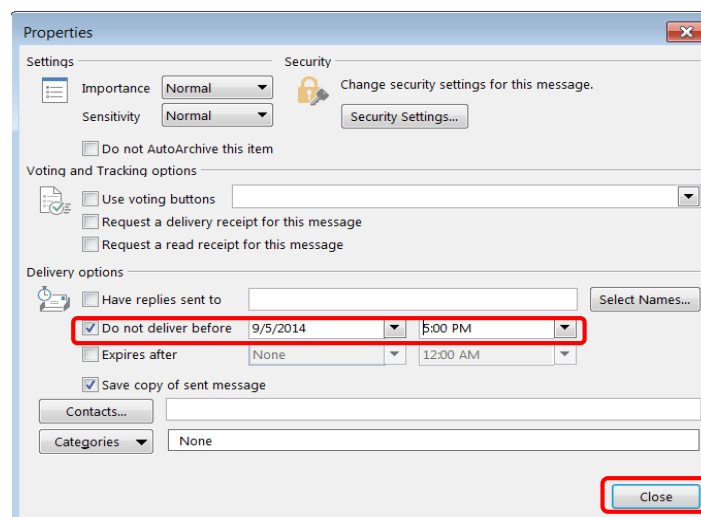
Option	Description
Normal	Indicates that the message's contents are standard or customary.
Personal	Suggests that the message's contents are of a personal nature.
Private	Prevents the message from being modified after you send it.
Confidential	Denotes that the message's contents are restricted or private.

C. Delay Sending message

When composing a message you can delay the email delivery. For example, you can schedule the delivery of your email for a specified time or date, if you do not want to send it immediately.



1. Click on the **Options** tab, and then click on the **Delay delivery** button.
2. The **Properties** window will appear.



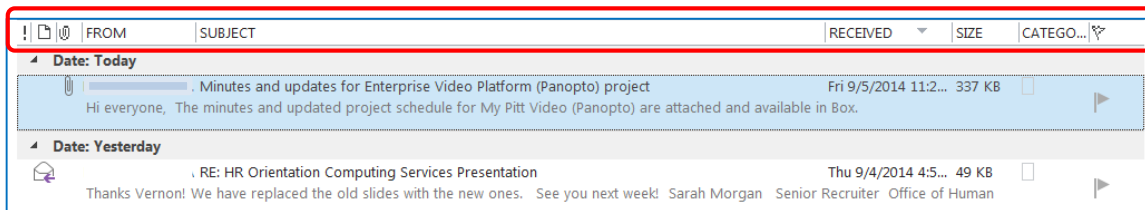
3. In the **Delivery options** section, click on the check box next to **Do not deliver before**, and select your desired date and time.
4. Click on the **Close** button.

V. Organize Email

Microsoft Outlook allows you to change the defaults and setups to your email inbox according to your preference.

A. Categorize Messages

The column headings bar list email properties under the appropriate heading, these heading can be rearranged according to your preference.



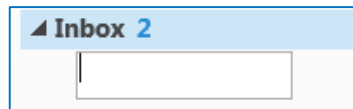
1. Click on a **column heading** to sort messages by that associated heading title.
2. For example, to view newest messages at the top of the list, click on the **Received** column heading. A triangle icon pointing upward indicates an ascending sort (oldest to newest). A downward-pointing triangle indicates a descending sort.
3. You can add new columns by right-clicking in this list.
4. You can move columns by dragging them to different locations.

B. Create Folders

Your mail folders are located on the Navigation pane. You can create additional folders for specific email from senders.

1. In the **Navigation** pane where your folders are located, right-click and choose the **New Folder** option.

2. A **rectangle box** will appear under the parent folder you selected.

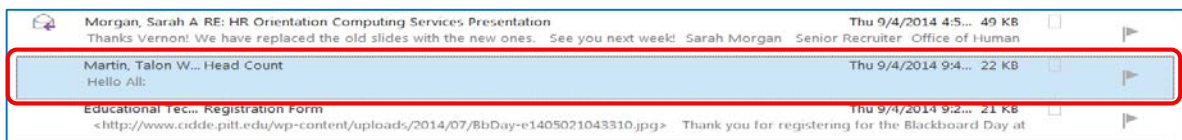


3. In the rectangle box, type a name for the new folder.
4. The new folder will automatically appear in alphabetical order under the parent folder.

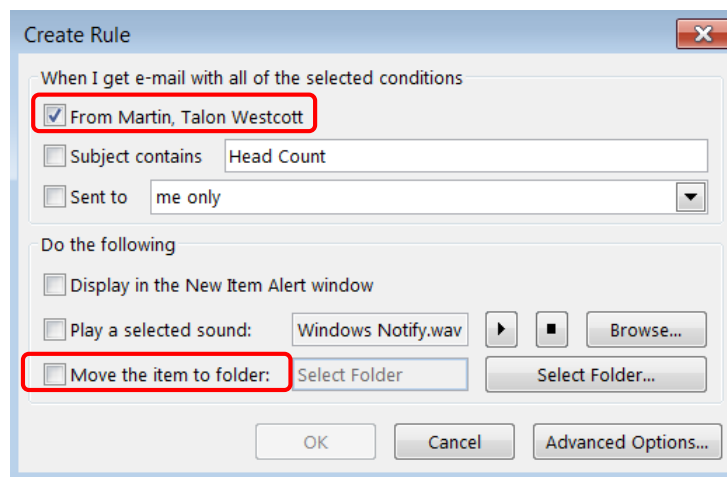
C. Create Rules

You are able to create a rule base on the sender, recipients or conversation topic of a message to always move to a designated folder of your choice.

1. Select the email which you want to base a rule.



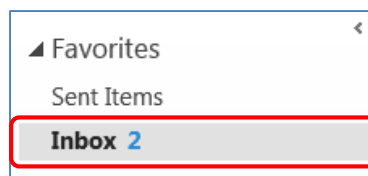
2. On the **Home** ribbon, click on the **Rules** button, and then select **Create Rule**.
3. The **Create Rule** window will appear.



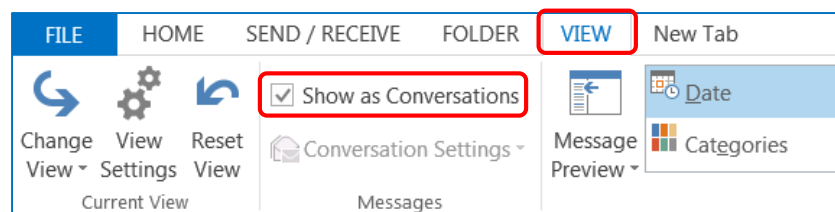
4. Click on the check boxes next to **From** and **Move the item to folder**. The **Rules and Alerts** window will appear.
5. Click on the Outlook folder where you would like future messages to be stored, and then click on the **OK** button.

D. View Conversation

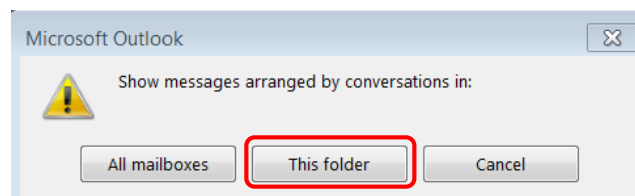
Microsoft Office contains a feature that will allow you to arrange messages by conversations.



1. Select a folder from your Mailbox where the email conversation string is located.

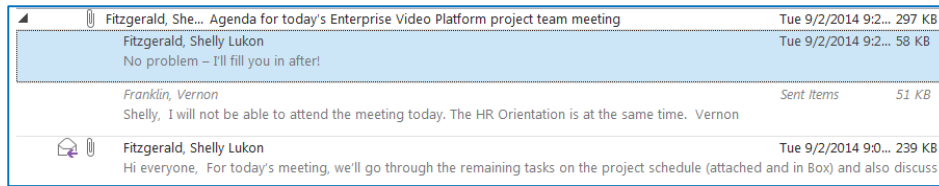


2. Click on the **View** tab, and then click on the check box next to **Show as Conversations**.
3. The **Microsoft Outlook** window will appear.




4. Click on the **This folder** button.

5. A triangle will appear next to email that has a conversation string.

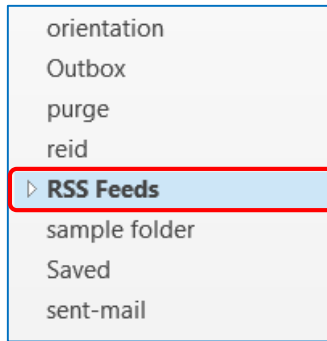


6. Click on the **triangle**, and then email conversations will appear under the triangle.

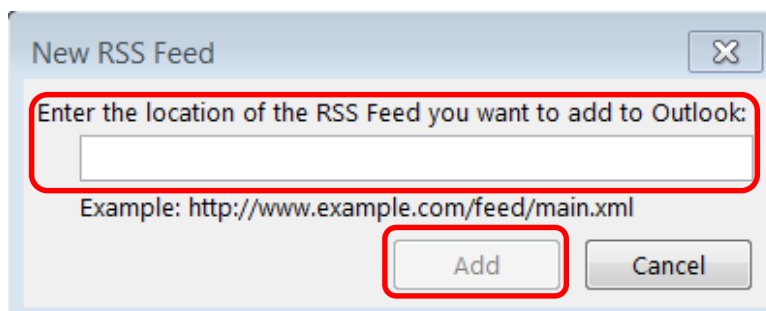
E. Subscribe to RSS Feeds


Really Simple Syndication (RSS)  provides an easy way for you to read the latest postings to your favorite Web sites. Many Web sites offer RSS Feed subscriptions, so that whenever new content is published, such as an updated news article you can receive a summary or the full article automatically in Microsoft Outlook 2013.





1. On your **Folder** pane, place the mouse pointer on the **RSS Feeds** folder, click on the right mouse button, and then select the **Add a New RSS Feed** option.
2. The **New RSS Feed** window will appear.




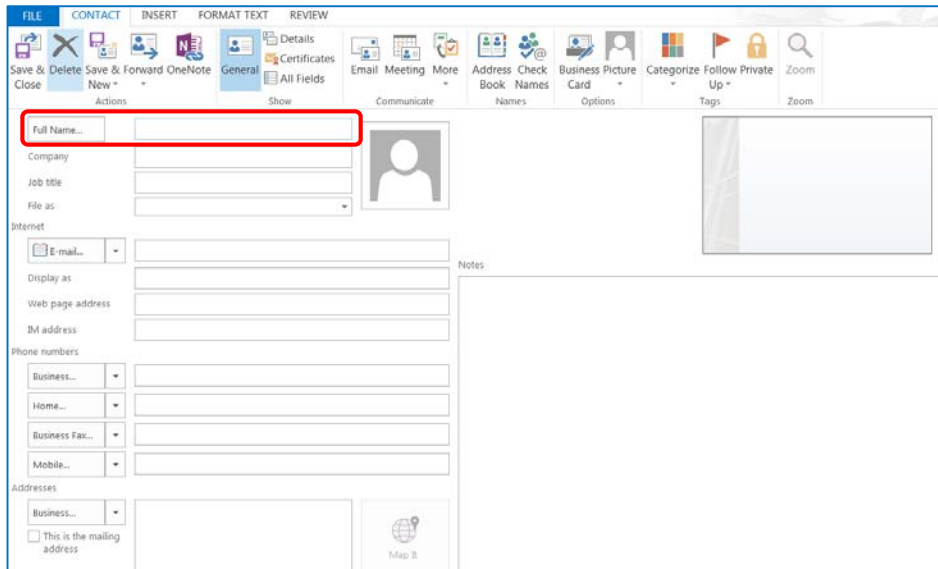
3. Go to the Web site where you desire a RSS Feed, and click on the **RSS Feed**  button, which will link you to the RSS Feed Web site.
4. Copy the Web site address (select the URL from the web address box, then compress the Ctrl key and click on the letter C key – Ctrl, C.). Go back to the **New RSS Feed** window, and then paste (Ctrl, V) the URL (Web address) in the **Enter the location of the RSS Feed you want to add to Outlook** box.
5. Click on the **Add** button.

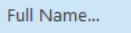
VI. Contacts

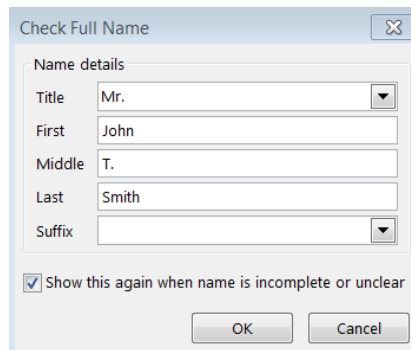
The Contacts component of Outlook allows you to store information, such as mailing and email addresses, for those people you frequently correspond with. Storing contact information allows you to perform functions such as quickly addressing email messages and tracking contact activities.



A. Create New Contact

1. Click on the **People** component on the **Outlook Navigation** pane.
2. Click on the **New Contact**  button, located on the **Home** ribbon. The **Contact** window appears:



3. Type the contact's name in the **Full Name** text box in the order **First, Middle, and Last**. Outlook uses an **AutoName** feature to automatically index the name. (Information can also be copied and pasted into these fields.)
4. Click on the **Full Name**  button to verify that the name has been indexed correctly.

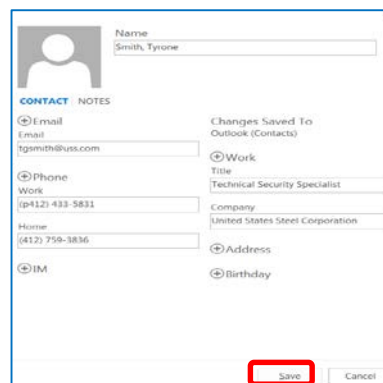


5. Make changes if necessary, then click on the **OK** button.
6. Continue to enter the desired information for the contact. Notice that clicking the drop-down arrow  button, beside **E-mail**, **Phone numbers**, and **Addresses** will allow you to enter more than one item.
7. Click on the **Save & Close**  button.

Note: You can also create a contact from an email message you receive. When email is open, place mouse pointer in the **From** field, right click on the name you want to make a contact, and then select **Add to Outlook Contacts** from the shortcut menu.

B. Edit Contact Information

To edit an individual from your contact list, **double click** on the contact name. The contact information window will appear. Make your edits, and then click on the **Save** button.





The screenshot shows the 'CONTACT' information window for John T. Smith. The fields are as follows:

- Name:** Smith, Tyrone
- Email:** tgsmith@uss.com
- Phone:** Work: (p)412-433-5831; Home: (412) 759-3836
- Address:** Work: Technical Security Specialist; Company: United States Steel Corporation
- IM:** (empty)
- IM:** (empty)


The 'Save' button at the bottom right is highlighted with a red box.

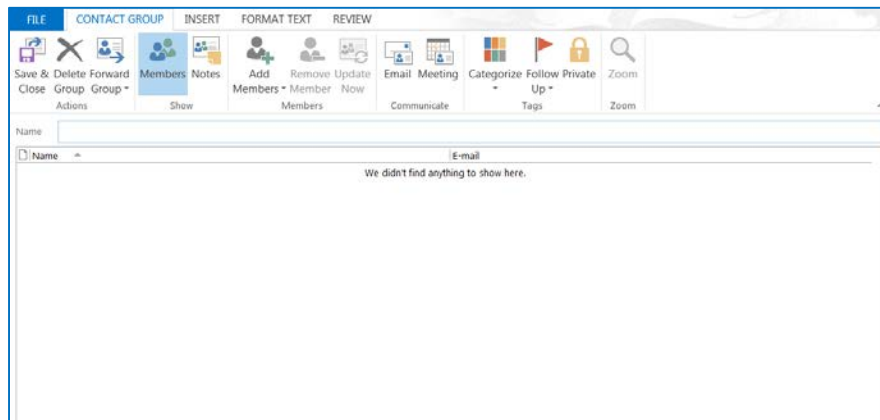
C. Delete Contact

Select the contact you want to delete, and then click on the **Delete**  button, located on the **Home** ribbon. You can select more than one contact by holding the Ctrl key, while you click on the contact names. You can use the **Edit, Undo** command to restore a contact that was deleted by mistake.

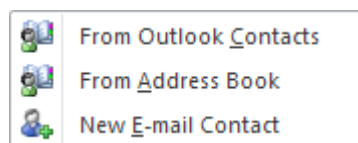
D. Create Distribution List

You are able to create a distribution list using names from Outlook Contacts, Address Book, or New Email Contact.

1. When in Contact, click on the **New Contact Group**  button, located on the **Home** ribbon. The **Contact Group** window will appear.



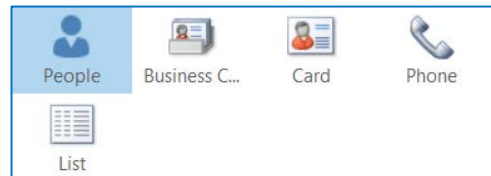
2. Click on the **Add Members** drop-down arrow. A shortcut menu will appear.



3. Select your desired option.
 - a) **From Outlook Contacts:** Your personal outlook contact window will appear to select individuals.
 - b) **From Address Book:** The Global Address List window will appear to select individuals.
 - c) **New E-mail Contact:** The Add New Member window will appear to add individual's name and email. (Use this option when an individual is not in your outlook contacts or the global address list.)
4. After new contacts are added, in the **Name** box of the **Contact Group** window, type your distribution list name.
5. Click on the **Save & Close** button.

E. Contact Views

There are several different ways to view your contacts on screen. Views only change the way your information is displayed.



1. To change the view, click on your desired option button.

View	Description
People	List contacts in alphabetical order with picture next to it, if inserted.
Business Card	One individual business card for each contact.
Card	One individual card with one mailing address and business and home phone numbers.
Phone	In a list with company name, business phone number, business fax number, and home phone number.
List	One line entry for each contact.

F. Print Contacts

You can print an individual or a group of contacts. To print when in **Contacts**, select **File**, and then click on the **Print** option. Before printing your output, you can select **Setting** for a desired style, and then click on the **Print Options** button for a print range.

VII. E-Mail Using Mail Merge

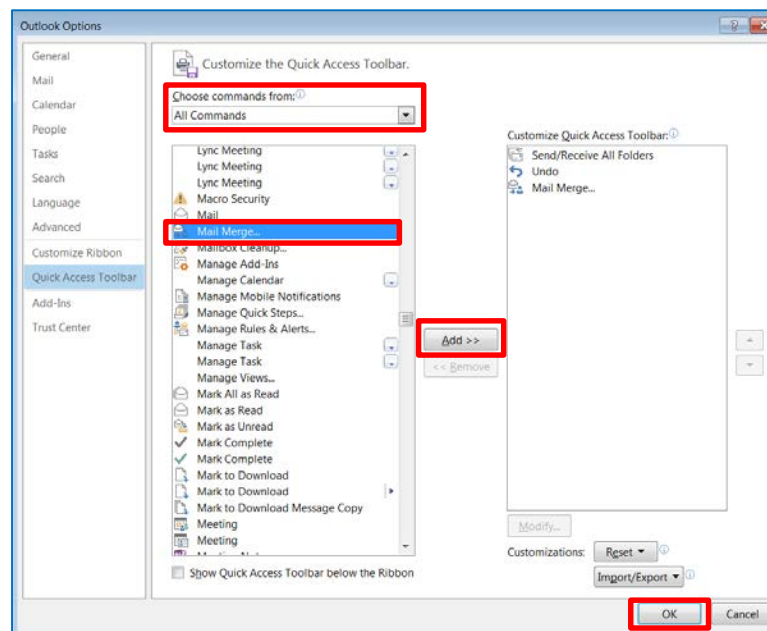
A. Add Mail Merge Command

Before starting your E-Mail Merge the **Mail Merge** button must be added to your Quick Access Toolbar or within any Ribbon of your choosing. In this exercise the **Mail Merge** button will be added to the **Quick Access Toolbar**.

1. Click on the **drop-down arrow** on the right-side of the **Quick Access Toolbar**.



2. Select the **More Commands** option.
3. The **Outlook Options** window will appear.



4. Click on the **drop-down arrow** in the **Choose commands from** selection, and select the **All Commands** option.
5. In the **Separator** window all commands will be listed in alphabetical order.

6. Scroll down on the **Separator** window to find **Mail Merge**. Click on the **Mail Merge** option in order to highlight text, and then click on the **Add** button in between the **Separator** and **Customize Quick Access Toolbar** windows. This will place the **Mail Merge** button in the **Customize Quick Access Toolbar** window.
7. Click on the **OK** button.
8. The **Mail Merge** button will appear on the **Quick Access Toolbar**.



Note: The above screen shots are from **Outlook 2013**, due to the University's **My Pitt Email Upgrade**.

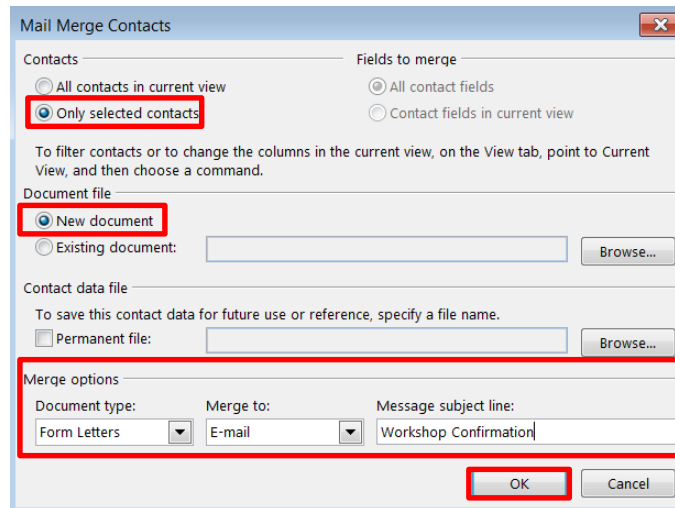
B. Create E-Mail Merge from Outlook

The **E-Mail Merge** contains your e-mail message with identical text for each recipient. Field codes are also inserted where you want the information from the Outlook Contacts in order to customize your e-mail messages.

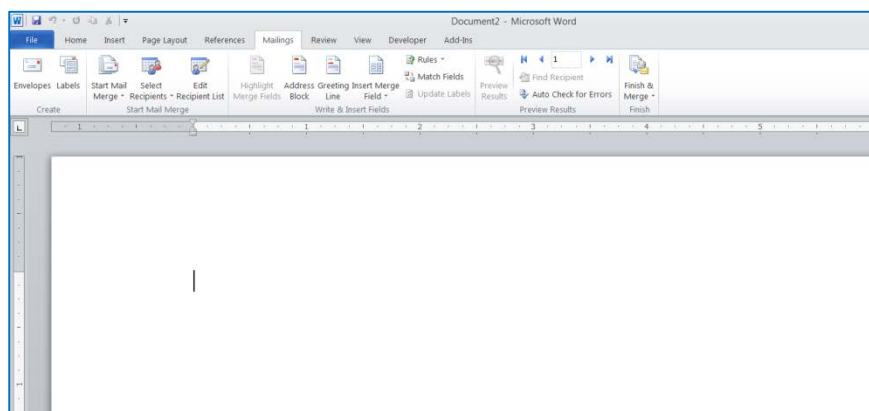
1. To start your **E-Mail Merge**, open your **Contacts List** in Microsoft Outlook.
2. If you will not be e-mailing your entire contacts, then select only the contacts you desire. When selecting contacts, click on your first contact, and then hold down the **Ctrl** key on the keyboard while selecting other contacts.



3. Click on the **Mail Merge** button.
4. The **Mail Merge Contacts** window will appear.



5. In the **Contacts** section, make sure the **Only selected contacts** radio button is selected, when contacts have been selected.
6. In the **Document file** section, make sure the **New document** radio button is selected. (If you desire to use an existing document other than Outlook Contacts, then select the **Existing document** radio button, and click on the **Browse** button to locate file.)
7. In the **Merge options** section, make sure the **Form Letters** option is selected in the **Document type** area. In the **Merge to** area, click on the drop-down arrow, and select the **E-mail** option. In the **Message subject line** box, type your subject text (example: Workshop Confirmation).
8. Click on the **OK** button.
9. A blank document screen will appear.



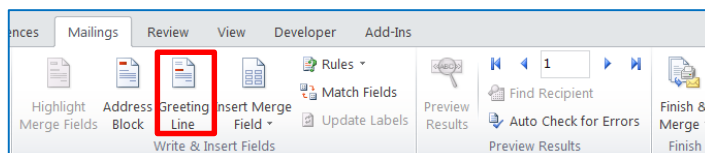
10. Type your e-mail message as seen below.

Dear

This e-mail is confirmation to your workshop registration. Your session will be held in the Science Center Lecture Hall on November 14th at 9am. If you have any questions before your session date, please do not hesitate to contact me.

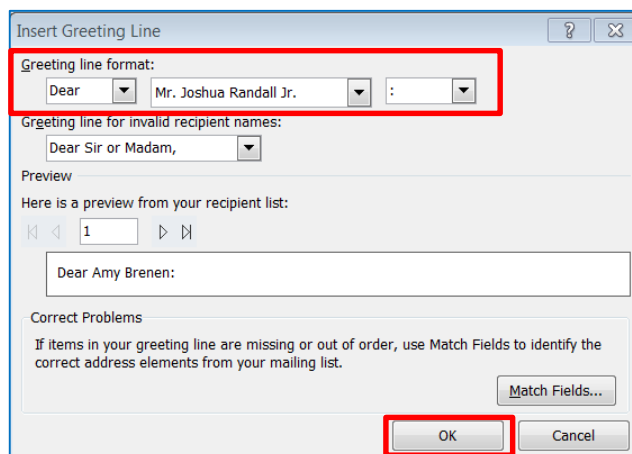
Sincerely,
Workshop Coordinator

11. Select the **Dear** text on the first line, and then press the **Delete** key on the keyboard.

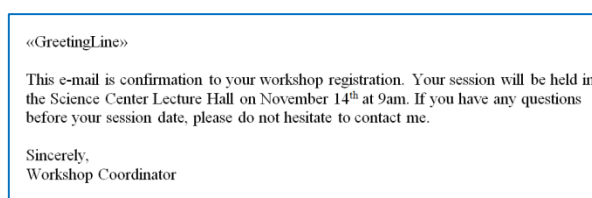


12. Click on the **Greeting Line**, located in the **Write & Insert Fields** group on the **Mailings** ribbon.

13. The **Insert Greeting Line** window will appear.



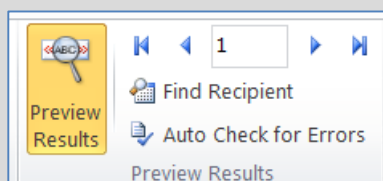
14. In the **Greeting line format** section, click on the first drop-down arrow to select a desired greeting, click on the second drop-down arrow to select a recipient's name format, and then click on the third drop-down arrow to select the punctuation.
15. In the **Preview** section, your **Greeting line** will appear on your e-mail message. You can click on the advance arrow above the **Preview** box to view other selected recipients.
16. Click on the **OK** button.
17. The <<**GreetingLine**>> field code will appear on your e-mail message.



18. Place the mouse pointer after the inserted field code, and then press the **Space bar** once on the keyboard to add a space.

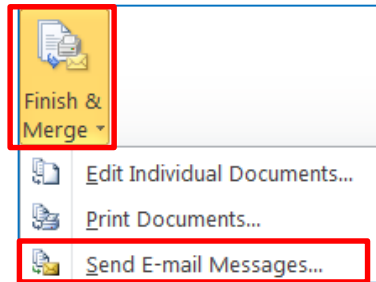
Note: The **Insert Merge Field** options contain each field name contained in your Outlook Contacts. This way you can select whatever field code desired throughout your e-mail message.

Click on the **Preview Results** button to remove the field codes, so you can view the actual field information. You can also click on the advance arrow to view the field information that will be on each letter. Before executing your E-Mail Merge, deselect the **Preview Results** button to replace the field codes back onto your e-mail message.



C. Send E-mail Messages

You are now ready to send your e-mail messages. Click on the **Finish & Merge** button, located in the **Finish** group on the **Mailings** ribbon.



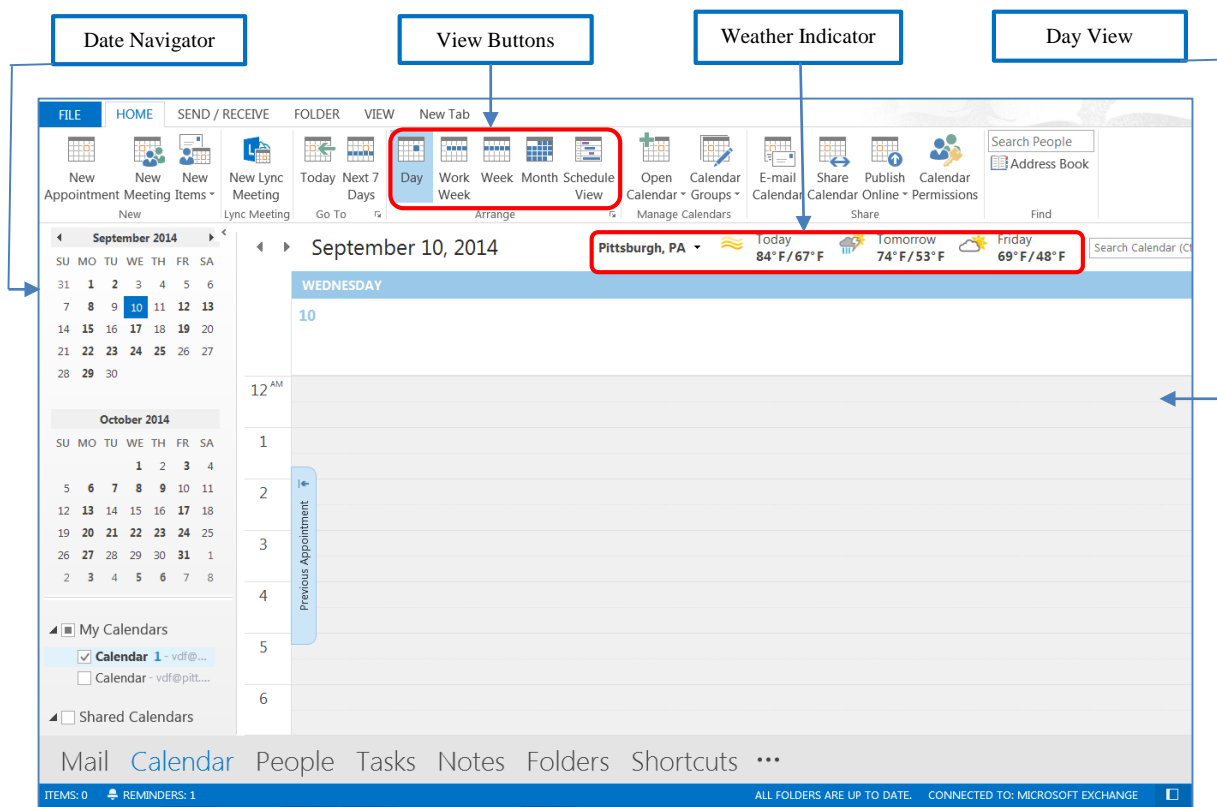
1. Click on the **Send E-mail Messages** option to send your customized e-mail messages.

VIII. Calendar

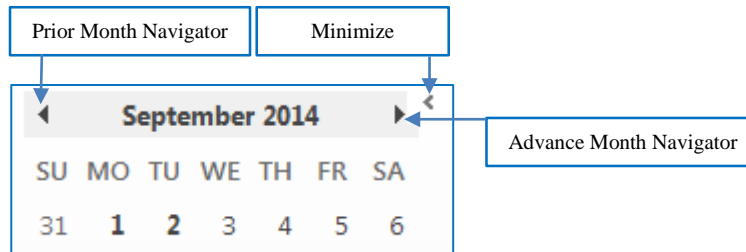
The Outlook Calendar has been designed to simplify maintenance of your schedule. The Calendar categorizes your schedule using three different classifications: appointments, meetings, and events. Your schedule can be viewed by day, work week, week, month or schedule view.

A. Calendar Screen

To open the **Calendar**, click on the **Calendar** option from the Outlook navigation pane. By default the Calendar will be displayed in day view.



1. Practice changing views using the **Day, Work Week, Week** and **Month** buttons. You can also change views by selecting the **View** ribbon, and choosing your desired view.
2. Practice using **the Date Navigator** to view past and future dates. To select a different date, single click the date.




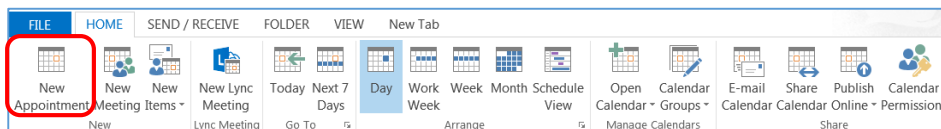
- Practice scroll through prior and advance months, and then minimize and maximize navigation pane. (Options may vary depending on the view you are using.)

B. Create Appointment

Appointments are activities you schedule in your calendar; unlike meetings they do not involve inviting other people or reserving resources. When an appointment is scheduled you can reserve a day, a time and a location that the appointment will occur. You can also set reminders for appointments and schedule recurring appointments. You can specify how others view your Calendar by designating the time an appointment takes as busy, free, tentative, or out of office.

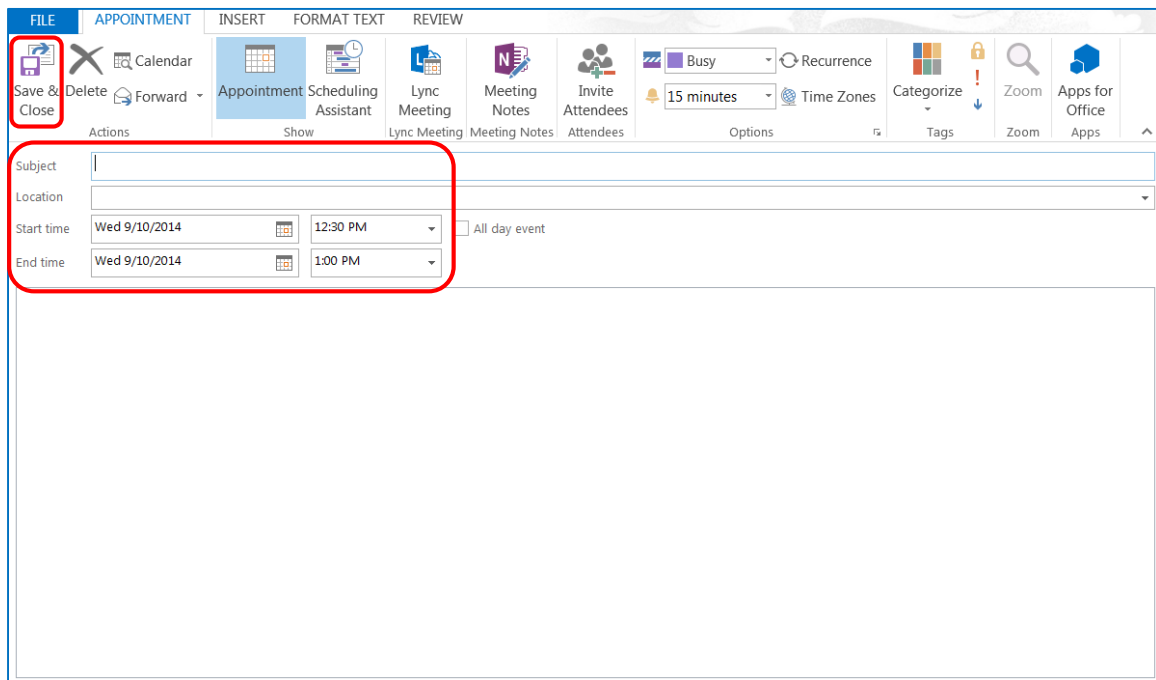
You can create an appointment by just typing in a block, by double clicking a block, or by selecting a block of time, right clicking, and then selecting New Appointment on the shortcut menu.

- On the **Home** ribbon, click on the **Day**  button to return to Day view.
- Select **today's date**. Notice that the current date is always shaded with a blue box 12.

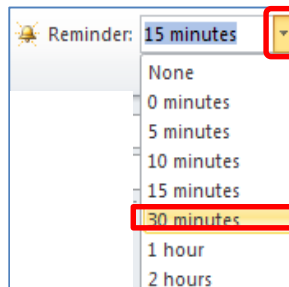


- On the **Home** ribbon, click on the **New Appointment** button.


4. The **Appointment** window will appear.



5. In the **Subject** box, type **Lunch with William Buckner**.
6. In the **Location** box, type **University Club**.
7. Click the drop-down arrow next to **Start** and **End time** to select the duration of your appointment.
8. On the **Appointment** ribbon the **Reminder** default is 15 minutes.



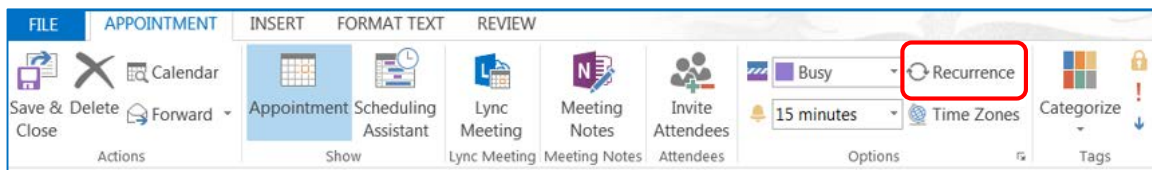
9. Change the **Reminder** time to **30 minutes**. Click on the drop down arrow next to the 15 minutes default and select **30 minutes**.

10. Below the Start and End times, click in the **Notes** box, and then type **Remember to take a copy of the project plans.**
11. Click on the **Save and Close**  button, located on the **Appointment** ribbon.

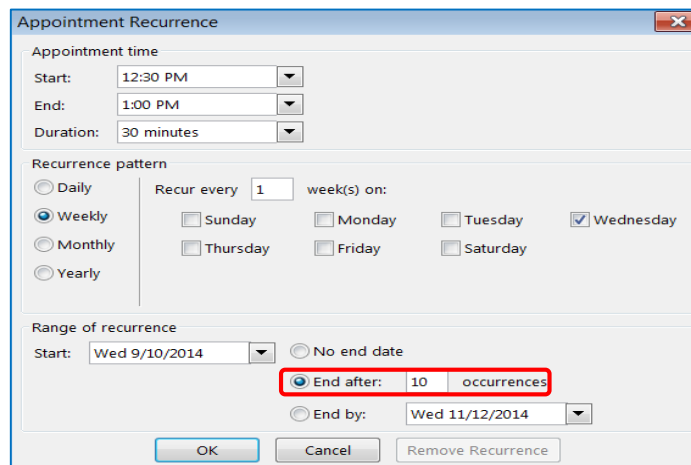
C. Recurring Appointments

A recurring appointment repeats on a regular basis. For example, a monthly meeting that always occurs on the second Friday of each month.

1. Click on the **Recurrence** button, located on the **Appointment** ribbon.

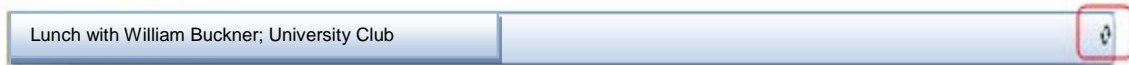


2. The **Appointment Recurrence** window will appear.



3. In the **Range of recurrence** section, click on the **End after** button. In the **Occurrences** box, type **10.**
4. Click on the **OK** button.

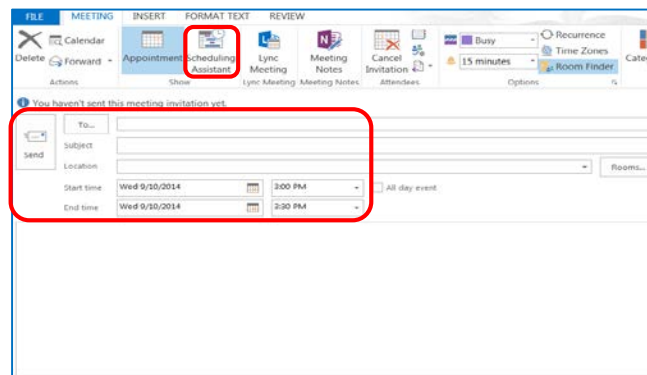
5. Notice that a Recurrence icon now appears on the right-hand side end of the appointment box.



D. Create Meeting

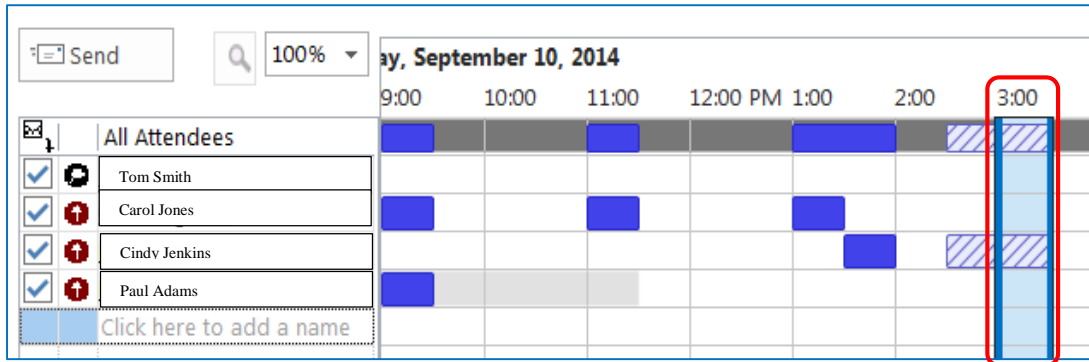
A meeting is an appointment you invite people to or reserve resources for (e.g., conference room, computer). The Outlook Meeting Planner allows you to look at other people's times during the day and select the best meeting time for the attendees. You can then send an email to everyone announcing the meeting and inviting them to attend. The attendees have the option to accept, decline or tentatively respond to your invitation.

1. For this exercise each class participant will work with a partner. One person should select today's date; the other should select tomorrow's date.
2. On the **Home** ribbon, click on the **New Meeting** button.
3. The **Meeting** window will appear.



4. In the **To** box, type the email address of your invitee(s) (**email of class partner**) or click on the **To** button to add email address by using the Global Address List.
5. In the **Subject** box, type **Staff Meeting**.
6. In the **Location** box, type **Conference Room A**.
7. Click on the drop-down arrow next to the **Start** and **End time** and select the meeting duration.

- Click on the **Scheduling Assistant** button, located in the **Show** group. The **All Attendees** window will display the availability for your invitee(s).

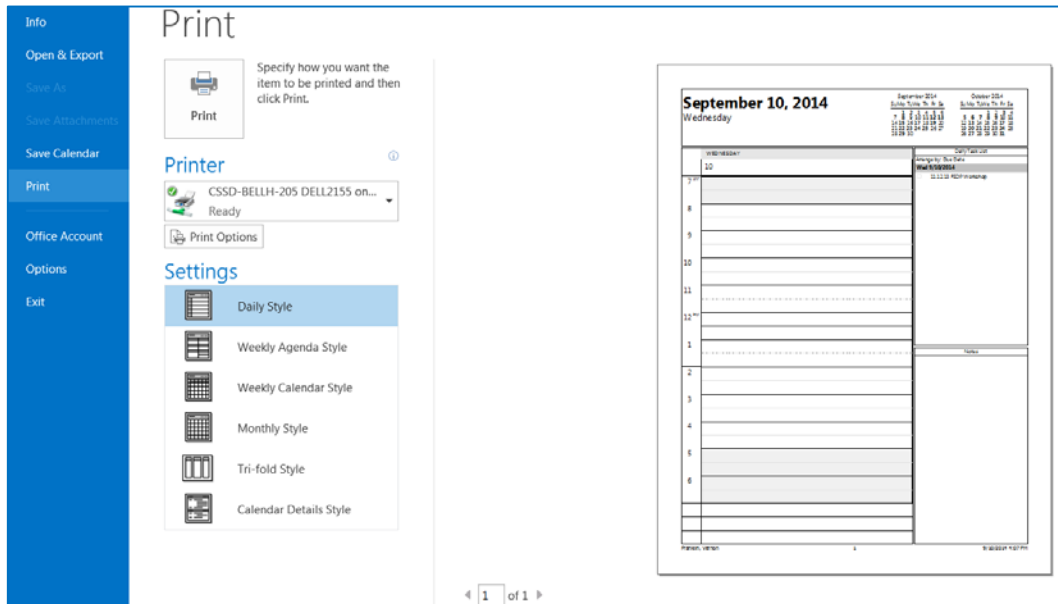


Note: Shaded areas represent attendee unavailability. Select different meeting time duration at the bottom of the All Attendees area to find non-shaded area for attendee availability.

- Click on the **Send** button.
- When the invitee receives the message they can respond to your invitation by **Accept**, **Tentative**, or **Decline**. A message will be sent to the initiator of the meeting and he or she can change the time of the meeting, if necessary and send a message again.

E. Print Calendar

You can print daily, weekly, and monthly views of your calendar. Outlook provides several preset page options that can be inserted into Day Timer's or pocket calendar books.

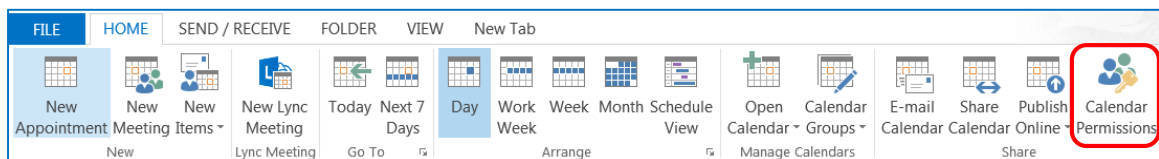


1. Select **File**, and then click on the **Print** option.
2. From the **Settings** section, select your print style. The Print Preview of the chosen style will appear on the right side of the screen.
3. Click on the **Print Option** to choose a Print range, if you desire multiple days or months.
4. Click on the **Print** button, after you have selected all your options.

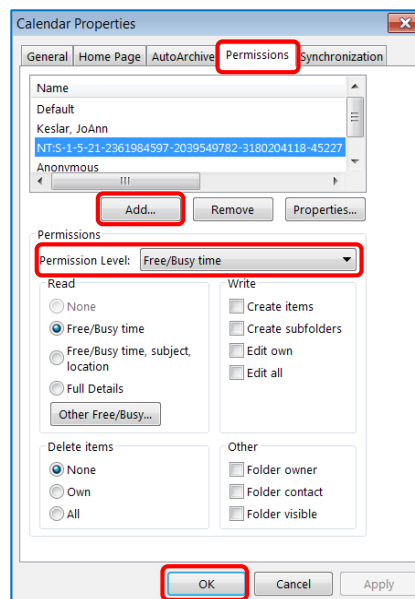
F. Calendar Permissions

You can give someone sharing permission to open and read the contents of your folders by selecting the reviewer permission when you share a folder. (For the Outlook Inbox folder, reviewer permission lets the other person delete your mail as well.) In addition, for Outlook, you can give another person sharing permission to schedule appointments and meetings for you in Calendar and to create and modify tasks for you in Tasks, depending on the permission level you specify for the person.

1. Click on the **Calendar** button on your Outlook Component pane.



2. Click on the **Home** tab, and then click on the **Calendar Permissions** button.
3. The **Calendar Properties** window will appear.




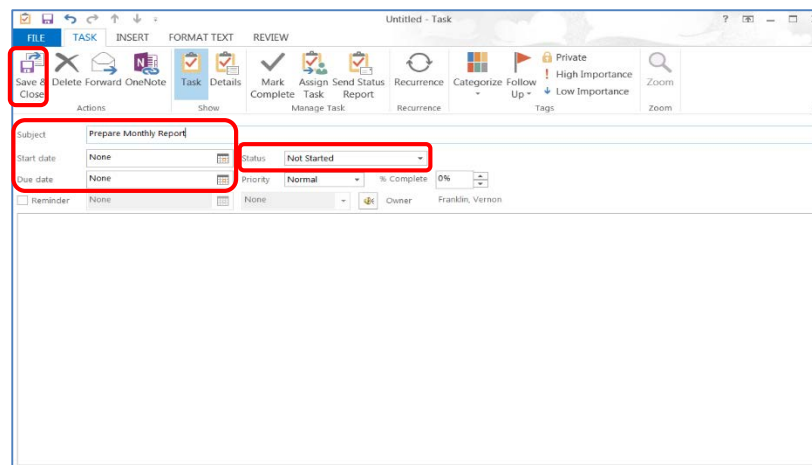
4. Click on the **Permissions** tab, and then click on the **Add** button.
5. The **Global Address List** will appear. Select the person to whom you want to delegate permission.
6. Click on the **OK** button.

IX. Task

A task is a personal or work-related errand you want to track through completion. A task can occur once or recurring task. A recurring task can repeat at regular intervals or repeat based on the date you mark the task complete. For example, you might want to send a status report to your manager on the last Friday of every month. Recurring tasks are added one at a time to the task list. When you mark one occurrence of the task complete, the next occurrence appears in the list.

A. Create Task

1. Select the **Tasks** component on the Outlook Navigation pane.
2. Click on the **New Task**  button, located on the **Home** ribbon.
3. The **Task** window will appear.



4. In the **Subject** box, type **Prepare Monthly Report**.
5. Enter a **Due Date**. Click on the drop down arrow and select a date from the calendar. For the class example, enter **today's date**.
6. Enter a **Start Date** (today's date).
7. Select the **Status** (In Progress). Click on the drop down arrow and you can choose Not Started, In Progress, Completed, Waiting on someone else or Deferred.
8. You can also enter a **Priority**, **% Complete**, **Reminder**, and **Notes** (box under Reminder).
9. Click on the **Save & Close** button.


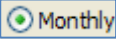
B. Edit Task

Editing a task is similar to editing a calendar entry. You can perform some editing inside the task list, or you can double click to open the Task window, and then edit any information.

1. Double click on the task created in the last exercise.
2. Change the Subject to read **Prepare Monthly Staffing Report**.


C. Recurring Tasks

Tasks can recur like appointments, however they will repeat at different intervals based on the date task is marked completed. When you mark one occurrence of the task complete, the next occurrence appears in the list.

1. Click on the **Recurrence**  button.
2. Select **Monthly**  Recurrence.
3. Click on the **OK** button.
4. Click on the **Save & Close** button.

D. Mark Task Complete

When a task is marked complete, reminders will no longer be displayed and a line crosses out the completed task and the text is dimmed instead of being deleted.

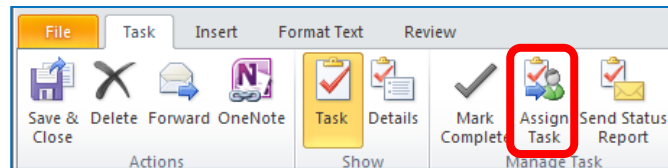
1. Click on the **Mark Complete**  button, located on the **Task** ribbon.
2. Notice the task mark complete, appears with a line through the text.



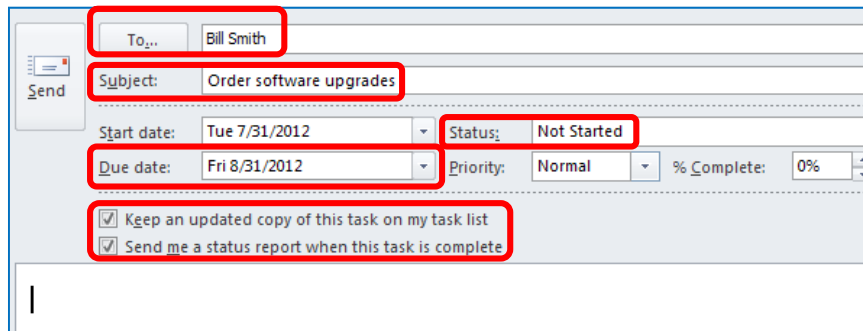
E. Task Assignments

You can assign a task by sending a task request to someone. The person who receives the task request can accept, decline, or assign the task to someone else. You can keep an updated copy of the assigned task in your task list and receive status reports, but you cannot make changes to a task you have assigned to someone else.

1. Select **New Task**.



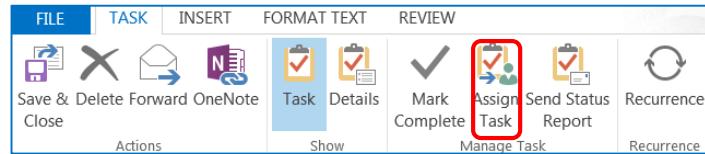
2. Click on the **Assign Task** button, located on the **Task** ribbon. The Assign Task window will appear.

A screenshot of the 'Assign Task' dialog box in Outlook. The 'To' field is set to 'Bill Smith'. The 'Subject' is 'Order software upgrades'. The 'Start date' is 'Tue 7/31/2012' and the 'Due date' is 'Fri 8/31/2012'. The 'Status' is 'Not Started' and the 'Priority' is 'Normal'. The '% Complete' is 0%. Two checkboxes are checked: 'Keep an updated copy of this task on my task list' and 'Send me a status report when this task is complete'. A text box at the bottom is empty.

3. In the **To** box, enter the name of the person you want to assign the task to. (select a class partner)
4. In the **Subject** box, type **Order software upgrades**.
5. Select the **due date** and **status** options you want.
6. 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. In the text box, type instructions or information about the task.
8. Click on the **Send** button.

F. Reassign Declined Task

1. Open the message that contains the task request.



2. Click on the **Assign Task** button, located on the **Task** ribbon.
3. In the **To** box, enter the name of the person you want to reassign the task to.
4. Click on the **Send** button.

G. Reclaim Ownership of Declined Task

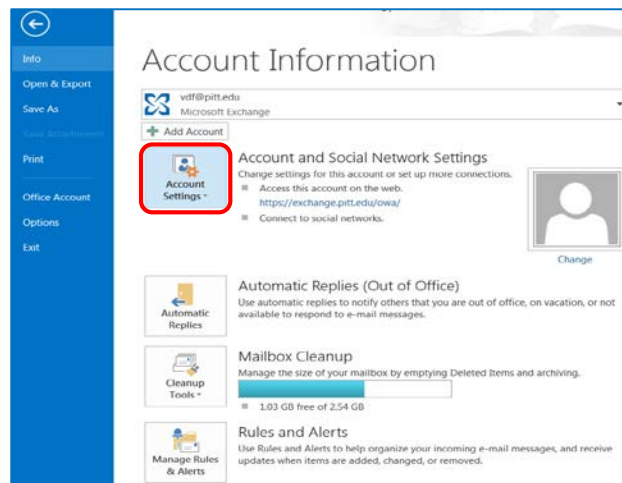
1. Open the message that contains the task request that was declined.
2. Click on the **Return to Task List** button, located on the **Task** ribbon.

X. Account Information

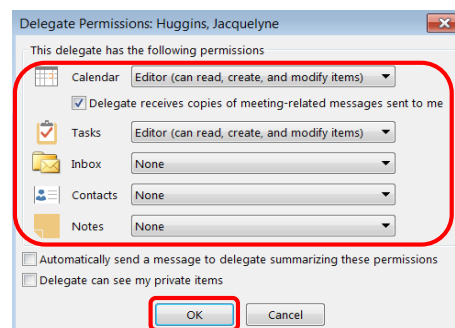
Account Information helps you to manage your Microsoft Outlook.

A. Account Settings

1. Click on the **File** tab, then the **Account Information** window will appear.



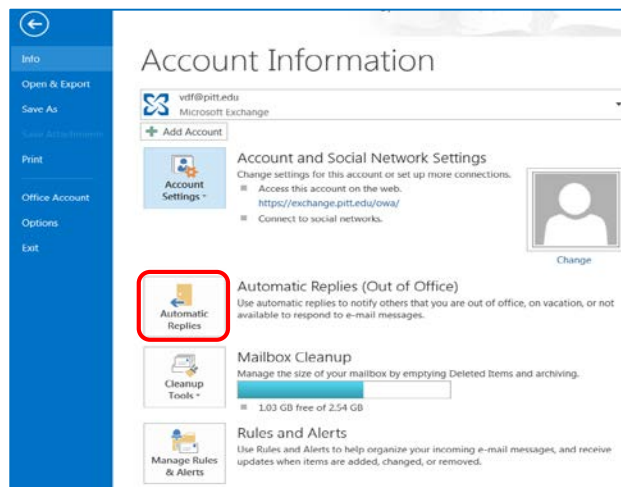
2. Click on the **Account Settings** button, and then select the **Delegate Access** options.
3. The **Delegates** window will appear.
4. Click on the **Add** button.
5. The **Global Address List** will appear. Select the person to whom you are granting permissions and click the **OK** button.
6. The **Delegate Permissions** window will appear.



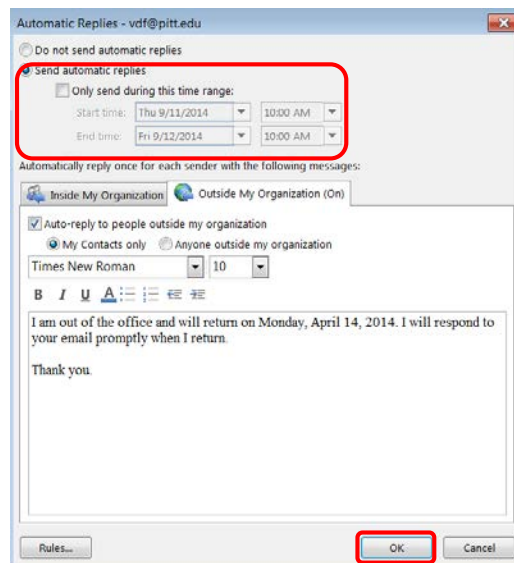
7. Grant permissions to your desired Outlook components (e.g., Calendar, Tasks) by clicking the drop-down arrow next to each component.
8. Click on the **OK** button.

B. Automatic Replies

1. Click on the **File** tab. The **Account Information** window will appear.



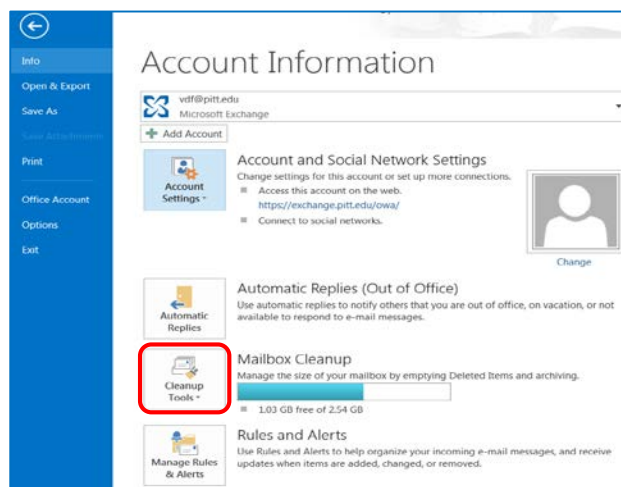
2. Click on the **Automatic Replies (Out of the Office)** button. The **Automatic Replies** window will appear.



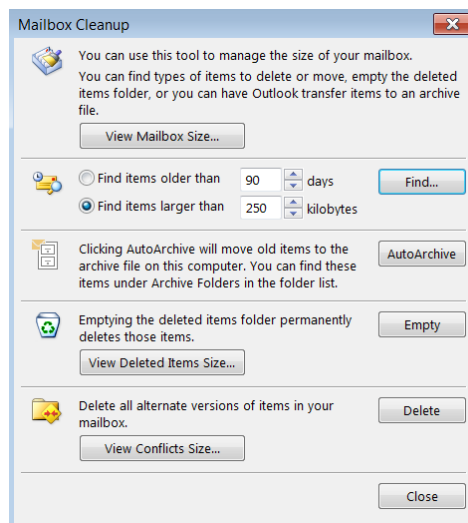
3. Click on the **Send Automatic replies** button, and select your **start** and **end times**.
4. Select the **Inside My Organization** and **Outside My Organization** tab, and type your desired out-of-office message.
5. Click on the **OK** button.

C. Cleanup Tools

1. Click on the **File** tab, and then the **Account Information** window will appear.



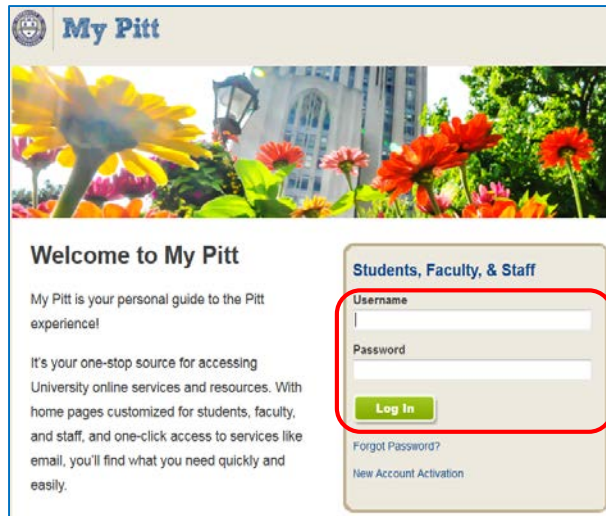
2. Click on the **Cleanup Tools** button. Select the **Mailbox Cleanup** option.
3. The **Mailbox Cleanup** window will appear.



XI. Access Email from My Pitt

Outlook email is located on the University's exchange server. Therefore, you have 24/7 and globe access to your University email from My Pitt. Any changes and deletions done while you are on the My Pitt exchange email will also be reflected on your Microsoft Outlook desktop client.

A. Log into My Pitt



My Pitt

Welcome to My Pitt

My Pitt is your personal guide to the Pitt experience!

It's your one-stop source for accessing University online services and resources. With home pages customized for students, faculty, and staff, and one-click access to services like email, you'll find what you need quickly and easily.

Students, Faculty, & Staff

Username

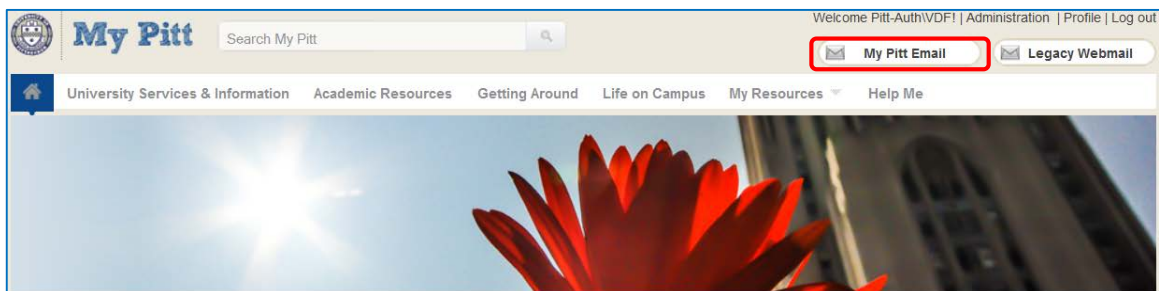
Password

Log In

[Forgot Password?](#)

[New Account Activation](#)

1. Go to **my.pitt.edu**, and enter your **University username and password**.



2. Click on the **My Pitt Email** link, on the top right-hand side of screen. This will give you access to the Outlook Exchange. The email screen will appear similar to your desktop client, but without the Microsoft Office ribbons.

XII. Email Etiquette

Email is a method of electronic communication worldwide, because it is fast and convenient. The University uses the Microsoft Outlook for their primary means of email communications. Email is often a more private means to communicate with colleagues than the public exchanges on social networks. There are appropriate as well as non-appropriate ways in communicating on email. Therefore, some tips in effective email communications are listed.

A. Dos and Don'ts Tips

1. Be concise and to the point
2. Use spell-check
3. Include signature line with contact information
4. Include meaningful subject line
5. Use Antivirus Software, Keep up to date
6. Use spam filtering
7. Do not type in all capital letters, which is interpreted as shouting
8. Do not default to "Reply All"
9. Avoid texting abbreviations
10. Use smilies sparingly to convey emotion
11. Be cautious about opening email and attachments from unknown sources
12. Do not forward hoaxes