

Department of Labor & Economic Growth

Migrating from GroupWise 6.5 to Outlook 2002

Configuration Information

and

Beginners Guide to Using Outlook

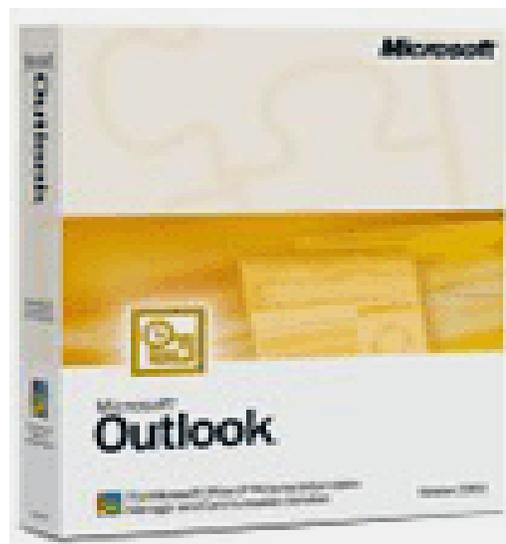


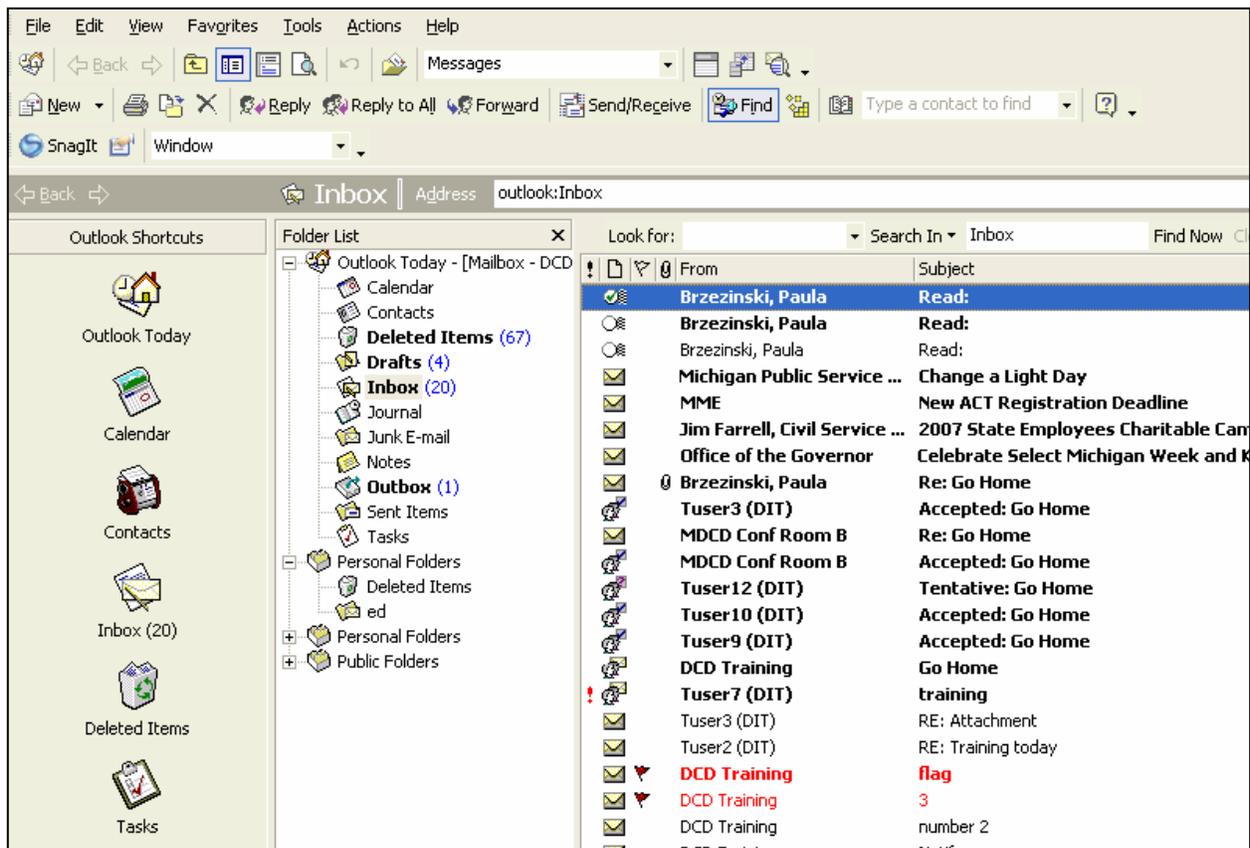
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I. First Time Configuration of Outlook

The default view of Outlook looks different from GroupWise. If you prefer to use the look of GroupWise, you will want to change the view by performing the following steps:

1. **Click on View, Folder List** to display your mailbox folders.
2. **Click on View, Outlook Bar** to remove the **Outlook Shortcuts Bar**.



NOTE: If you choose to use the **Outlook Shortcuts** bar, you have the option to drag any item in the **Folder List** onto the **Outlook Shortcuts** bar. You may also drag and drop shortcuts to Word, Excel, etc. from either your desktop or Start menu so that they are available to you in Outlook.

I M P O R T A N T

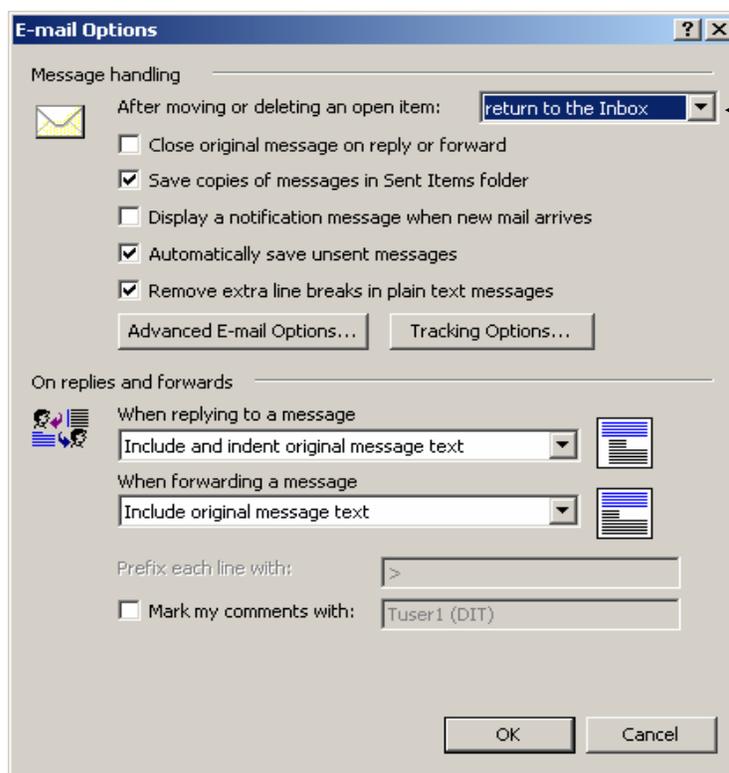
It is very important you change the setting for how the system handles an e-mail once it has been read. By letting the next e-mail automatically open, you could be opening up the door for a virus to infiltrate the State of Michigan e-mail system which then opens up the potential to infect other computer systems. Therefore, please make the following changes:

*To close the **Preview Pane***

1. From your **Inbox** folder, **click** on **View, Preview Pane**.
This is a toggle switch; by clicking on it you are turning it off. If you click on it again, you will turn it back on.
2. **Repeat** this **process** for **each folder** in Outlook.

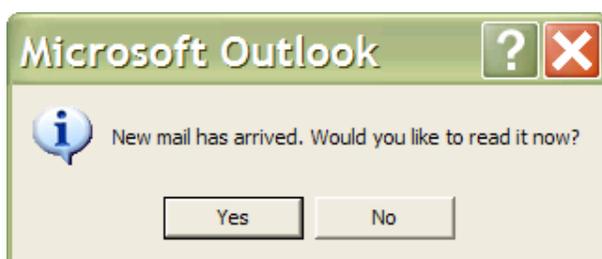
To return to the Inbox after moving or deleting an open item

1. **Click** on **Tools, Options**.
2. Under **Preferences**, **click** on **E-Mail Options**.
3. Under **Message handling**, select **return to the Inbox** from the drop-down list next to **After moving or deleting an open item**.
4. **Click** on **OK**.



Notify in Outlook

Notify in Outlook works differently than in GroupWise. The Notify dialog box does not display any information concerning the new mail message (who the sender is, what the subject is, etc.). Without knowing this information, the notification of new mail may not be very useful.

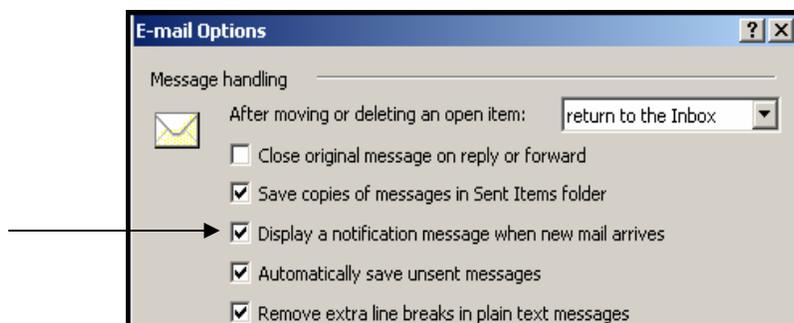


Therefore, you have the option of turning this feature on or off. If you turn this feature on remember if you select '**yes**' to read the message but you cannot tell who the message is from you might be allowing a virus into your system. The Notify will not work unless you have Outlook minimized on your taskbar.

If you opt not to use this feature an **envelope** will **appear** in the **lower right hand side** of **your taskbar** indicating you have new mail.

Remember if the "*Display a notification message when new mail arrives*" is checked opt to say '**no**' when asked to read new mail. To turn it off, simply uncheck the box entitled "*Display a notification message when new mail arrives.*"

This option is found in the E-mail Options.



II. Outlook Today

The Outlook Today page provides a preview of your day. By using Outlook Today, you see at a glance your current appointments, a list of your tasks, and a summary of your mailbox messages.



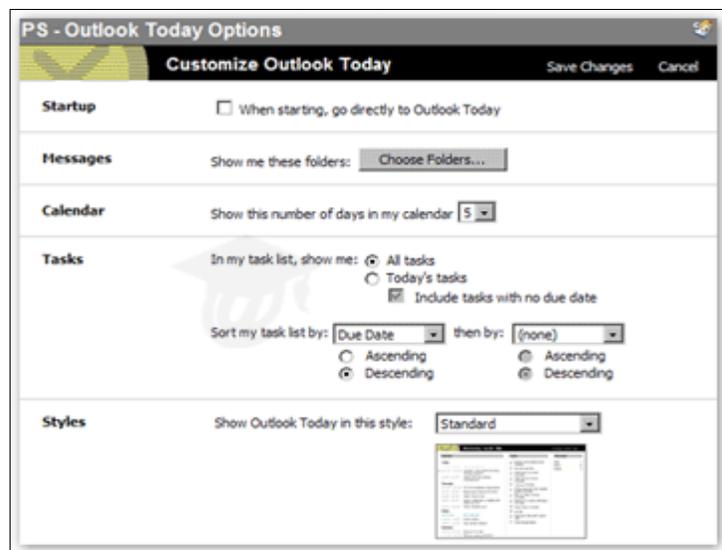
To Activate Outlook Today

1. Click on **View, Go To, Outlook Today**.

Customizing Outlook Today

Once the Outlook Today screen is displayed, you may customize what this overview displays.

1. Click once on **Customize Outlook Today** in the upper-right corner.
2. You may have **Outlook Today** as your main startup page by selecting the first item: **When starting, go directly to Outlook Today**.
3. Further customize your Outlook Today by changing the folders that appear, calendar, tasks, and styles.
4. Click on **Save Changes** to close. The Save Changes option may be located in different locations on your screen depending upon which style you select.



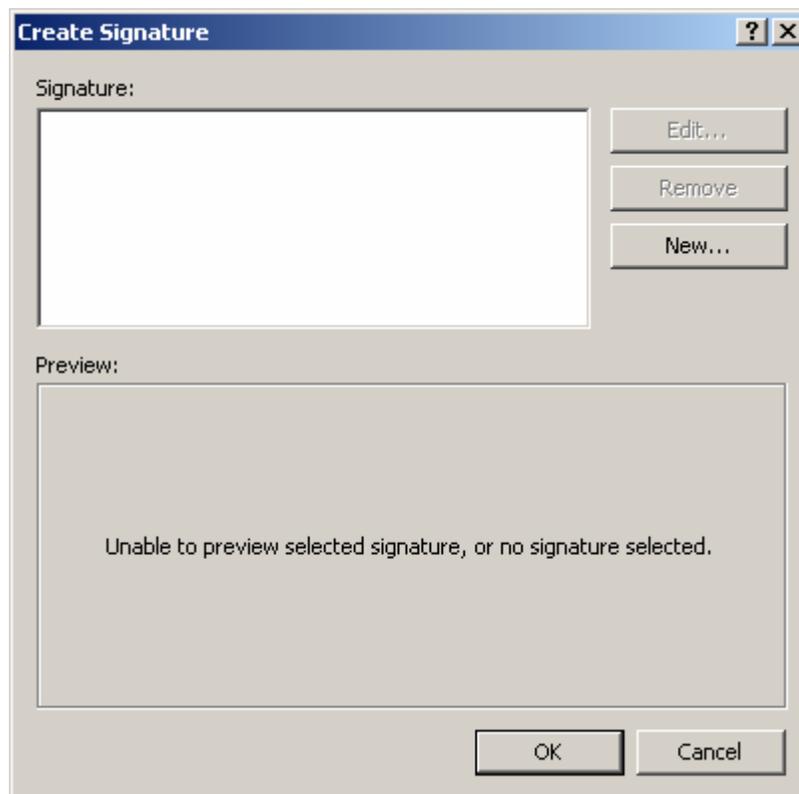
III. Signatures

Placing your signature at the end of your e-mail messages:

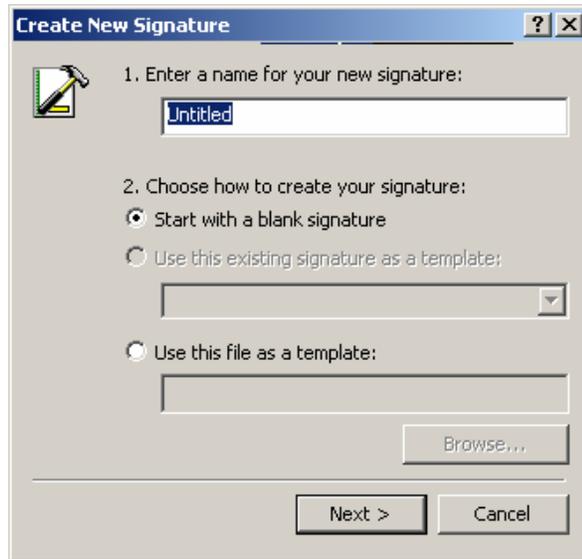
1. **Click** on **Tools, Options, Mail format tab**.
2. **Click** on the **Signatures...** button at the bottom of the screen in the Signature section.



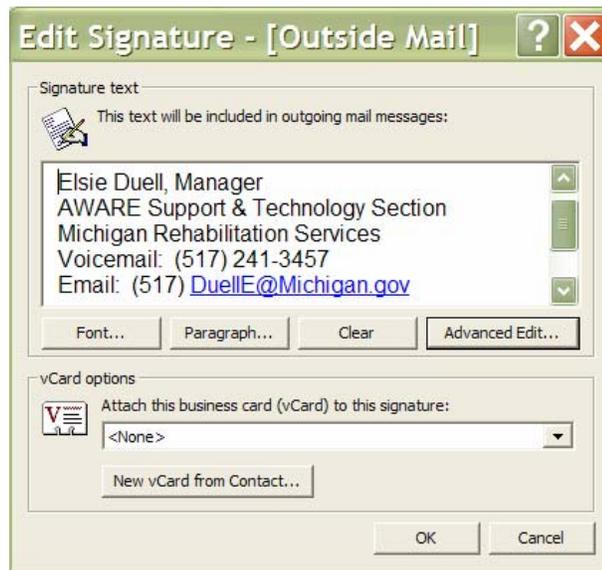
3. To create a new signature, **click** on **New...**



4. **Type a name** for your signature that will identify when the signature should be used.
5. **Click on Next.**



6. **Type in your signature information.** It is recommended you include your name, office, and phone number as a minimum amount of information in your signature.
7. **Click on OK.**



8. You will need to repeat the process for creating more signatures.
9. After creating your signature(s), select when it should be used.
10. In the drop-down boxes next to **Signature for new messages** and **Signature for replies and forwards**, you will now see the signature(s) you created as the Signature box displays a list of all signatures created. You may choose to use the new signature for either or both or none.
11. **Click OK** to close.

Now when you create new messages, your selected signature is automatically inserted.

NOTE: If you wish to not have your signature appear at the bottom of a message, simply open up a new message and **highlight** your **signature** and **press** the **delete** key to remove your signature from the message.

IV. Sending and Receiving Mail

To Create and Send Mail

1. **Click** on **File, New, Mail Message**.
2. **Type** the **first** and **last name** of the recipient in the **To** and **Cc** boxes. To select recipient names from the address book, **click** the **To** or **Cc** button. You may also **click** on the **Check Names** button to **verify** the typed **names**.
3. **Type the subject of the message**. Refer to the *E-mail Etiquette* document for bureau recommendations concerning *Subject Lines* in Appendix A.
 - To add an attachment, **click** on **Insert, File**.



TIP: On the toolbar, if you **click** on the **down arrow next** to the **paperclip**, you may select either **File** or **Item**. **Selecting Item** will give you a list of all your folders in Outlook allowing you to select any mail messages in any of your Outlook folders.

4. After completing the message, **click Send**.

Saving a Message Started but NOT Completed

You have been working on a message and have to leave it for some reason, you may save your message as a draft instead of having to cancel out and start over later.

1. **Click** on **File, Save**.
2. **Close** the **message**.

When you're ready to complete the message and send it:

3. **Select** your **Drafts** folder from your folder list (located under My Shortcuts on the Outlook Shortcut bar).
4. **Double-click** the **message** you were working on to open it.
5. After finishing the message, **click Send**.

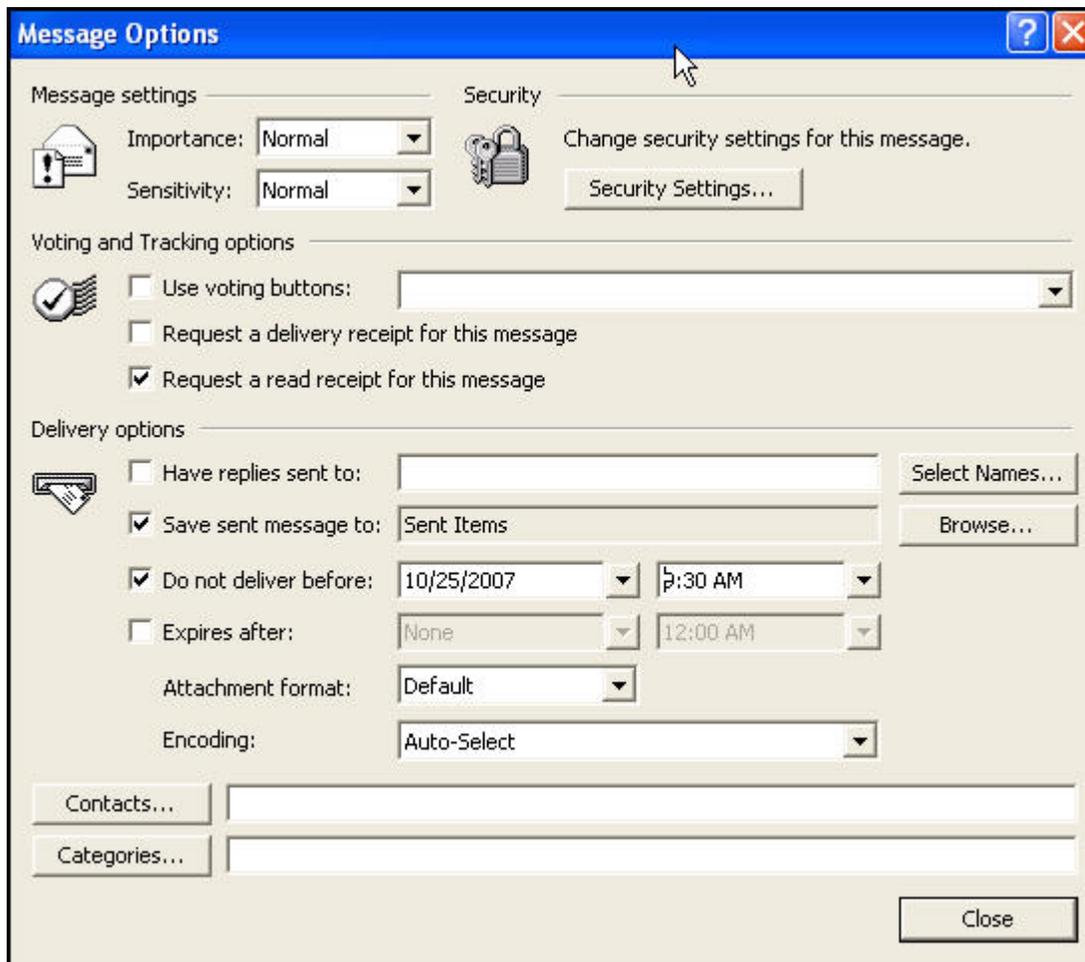
Your message will be sent and moved from the **Drafts** folder to your **Sent Items**.

To Read/Receive Mail

1. **Select** your **Inbox**.
2. In the message list, **double-click** the **message** you want **to read**.
3. If there is an attachment, **place your mouse on the attachment name** and **double-click on it**. The document will open up in the appropriate software application if the application is loaded on your system, i.e., Word, Excel, PowerPoint.

V. Message Options

There are four areas under Message options you may change that will affect the mail message you are composing: **Message settings**, **Security** (not used), **Voting and Tracking options**, and **Delivery options**.



Message settings

Message settings allow you to change the priority or **Importance** and **Sensitivity** of the mail message.

- The choices for **Importance** are Normal, High, or Low.
- The choices for **Sensitivity** are Normal, Private, Personal, or Confidential.

Note: It is not recommended you change the Security Settings in Outlook.

Voting and Tracking Options

Voting options provide the recipient an opportunity to respond by submitting a vote to your mail message by selecting the buttons that will appear. There are three voting options:

Approve; Reject

Yes; No

Yes; No; Maybe

Tracking options allow the sender to request a receipt for when the message is delivered and/or read. The two tracking options are:

- Request a delivery receipt for this message
- Request a read receipt for this message



TIP: **Message settings** and **Voting and Tracking options** may be set globally by selecting **Tools, Options** from the Main Outlook screen.

NOTE: If you select the global option to receive a response when the message you sent is opened – *you will receive a message back for **every** message sent.*

Delivery Options

Delivery options specify general options for how Outlook will deliver mail.

Replies are automatically sent back to you. However, if you want the replies to this message sent to another person:

1. Put a **check** in the **box next to Have replies sent to:** and **type their name** or select their name from the address book (by **clicking** on **Select Names...**)

Sent messages are automatically saved in your **Sent Items** folder. However, if you want to change where the message is saved:

2. Put a **check in the box next to Save sent message to:** and **Browse...** to the desired folder the message will be saved in.

You may mark this message for **future delivery** as follows:

1. Place a **check in the box next to Do not deliver before:**
2. Select a **date** and **time** for the **message** to be **sent**. The message will be placed in your **Outbox** folder until the date and time specified. At that time your message will automatically be sent and moved from your **Outbox** folder to your **Sent Items** folder.



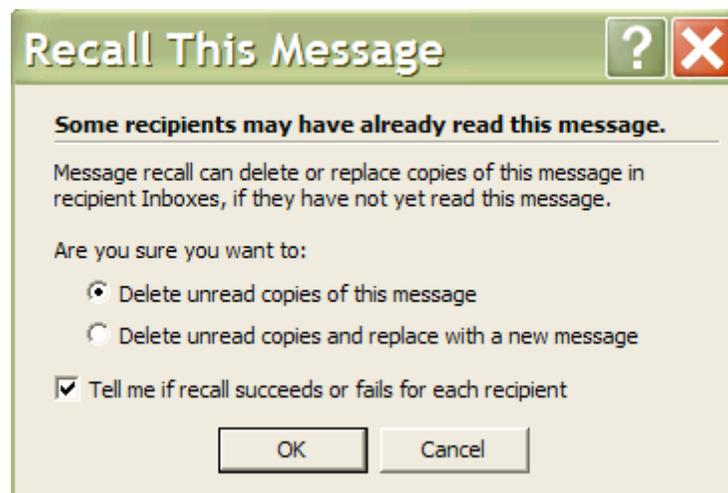
TIP: You may go to your **Outbox** folder to “retract” a message before it is sent if desired and the recipient will never see the message.

VI. Recall or Replace a Message You've Already Sent

This feature sends a message to the recipient asking for permission to retract the message. They may accept or decline. If they decline they may read the original message sent. However, if they accept, the message is recalled or replaced.

You may recall or replace only messages you send to recipients who are logged on and using Outlook and who have not read the message or moved the message out of their Inboxes.

1. **Open the message to recall or replace** from your **Sent Items** folder.
2. **Click on Actions, Recall This Message.**
 - a. To recall the message, **select Delete unread copies of this message.**
 - b. To replace the message with a new one, **select Delete unread copies and replace with a new message.**



3. To be notified about the success of the recall or replacement for each recipient, **select the checkbox: Tell me if recall succeeds or fails for each recipient.**
4. **Click on OK.**
5. **Close** the message window.

VII. Creating an Appointment on Your Calendar

There are many ways to create an appointment on your calendar. An appointment is a scheduled/blocked amount of time on your calendar you have scheduled yourself.

1. **Click on File, New, Appointment.**
2. **Fill in the Subject and Location.**
3. **Select the starting and ending time.**

 **TIP: Select the All day event option** when your appointment lasts the whole day.

4. The **Show time as** options specifies how your calendar looks to others by designating the time an appointment takes as **Busy, Free, Tentative,** or **Out of Office.**
5. **Click on Save and Close.**



 **TIP: You may create an appointment by clicking directly in the calendar on the date and time desired and typing in your appointment information.**

Calendar November 02 | Address outlook:Calendar

Friday, November 02

8^{am}
9⁰⁰
10⁰⁰ JET Data (MDCD Victor 4thFl Conf Rm 1)
11⁰⁰
12^{pm}
1⁰⁰ type your appointment information directly on the calendar...
2⁰⁰
3⁰⁰
4⁰⁰
5⁰⁰
6⁰⁰
7⁰⁰
8⁰⁰

November 2007

S	M	T	W	T	F	S
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

TaskPad

Click here to add a new Task

- Electronic Delivery of Service...
- Stack Printing
- New Proposal for Ticket Han...
- Fwd: AWARE 'bad news' letters
- RSA 113

VIII. Scheduling a meeting

A meeting is an appointment where you invite people to attend and/or reserve resources for.

To schedule a meeting:

1. **Click on File, New, Meeting Request.**
2. To **select recipient names** from the address book, **click the To or Cc** button. For each name entered, **click Required, Optional, or Resources.** (The Required and Optional attendees appear in the **To** box and Resources appear in the **Location** box.).
3. To reserve a resource (conference room or state vehicle) type the resource name and select it from the list by clicking on it once. Then **click on the Resources->** button to add the resource to the box.

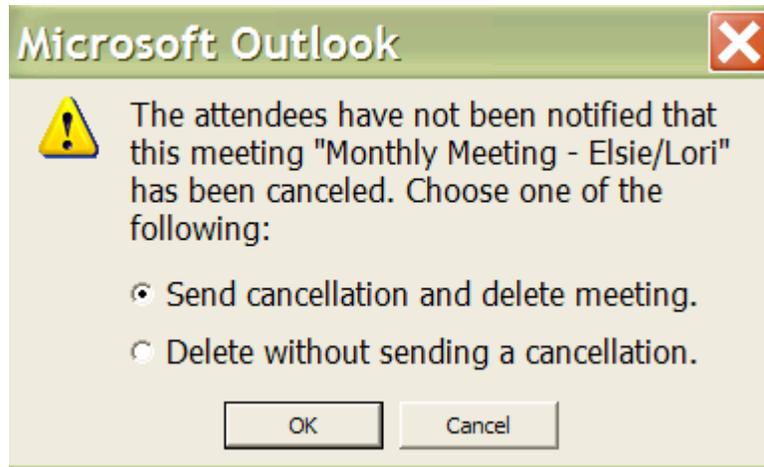


4. **Click on OK.**
5. Now **click** on the **Scheduling** tab and **use the scroll bars to view the free/busy time for the invitees.**
6. **Select a time when all invitees are available.** You may also use **AutoPick** to find the next available free time for all invitees.
7. The default **Show time as** option is **Busy.**
8. **Click on Send.**

IX. Canceling a Meeting

You may cancel meetings you have scheduled. To cancel a meeting you have scheduled, from your Calendar:

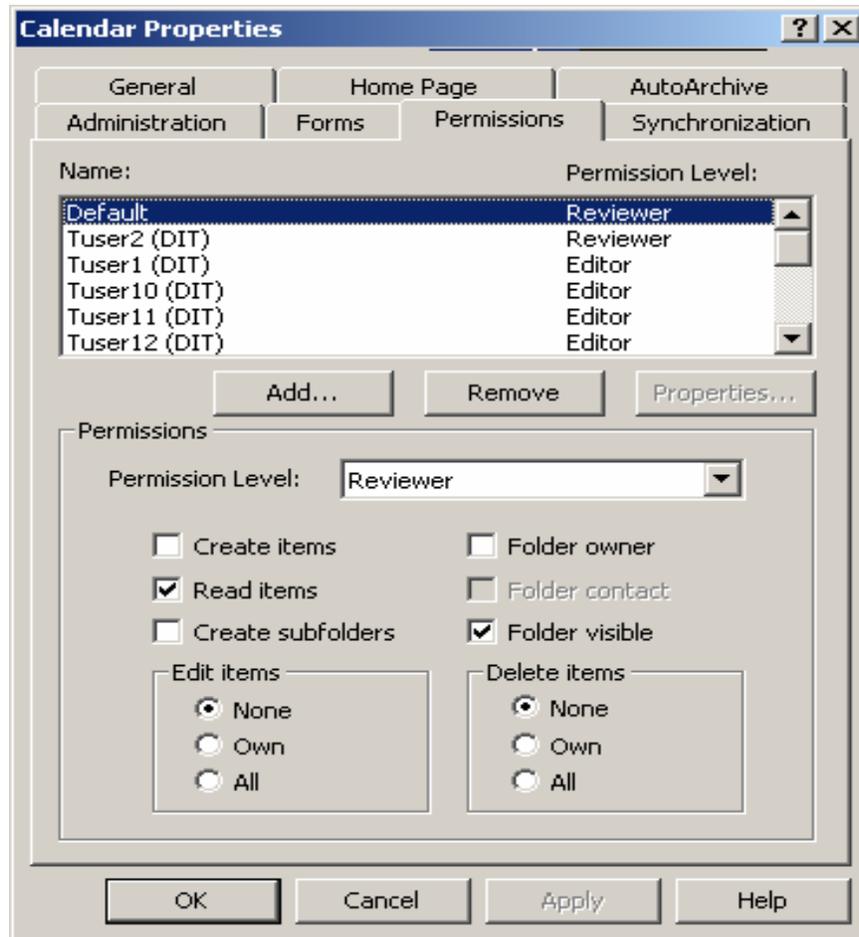
1. **Open** the **appointment** by **double clicking** on it.
2. **Click** on **Actions, Cancel Meeting**.



3. Select the **Send cancellation and delete meeting** option to notify all attendees of the meeting cancellation and to remove it from their calendars.
4. **Click** on **OK**.
5. **Click** on **Send** to send the cancellation message to all attendees.

X. Making Your Calendar Accessible to Others

1. **Right mouse click** on the **Calendar** Icon on the Outlook Bar.
2. **Choose Properties.**
3. **Click** on the **Permissions** tab.
4. With **Default** highlighted, **click** on the **Permission Level** drop-down arrow.
5. Select **Reviewer.**
6. **Click** on **OK.**



- You may change any of the options listed under each permission level selection.
- If you select **Default**, this grants everyone in the address book access to your calendar.
- The default option is perfect for using with resources, such as a *conference room* or *state car*.
- If you wish to allow specific staff access only, please select their name from the address book and select the appropriate access rights.

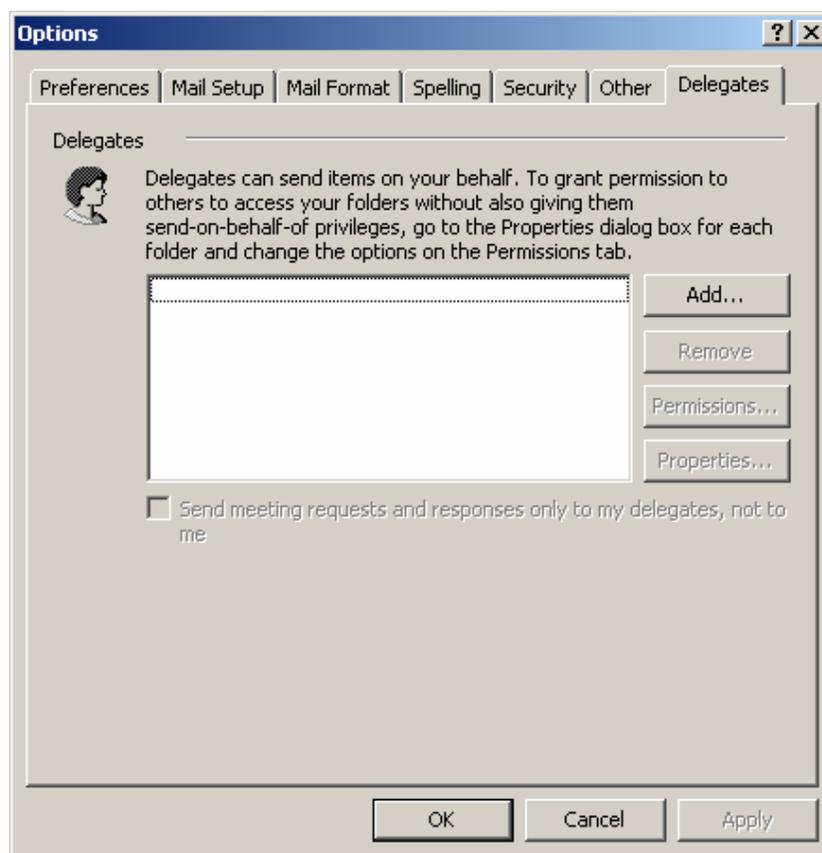
NOTE: Remember only Outlook users may view your Outlook calendar.

XI. Delegating Permissions to Other Areas of Outlook

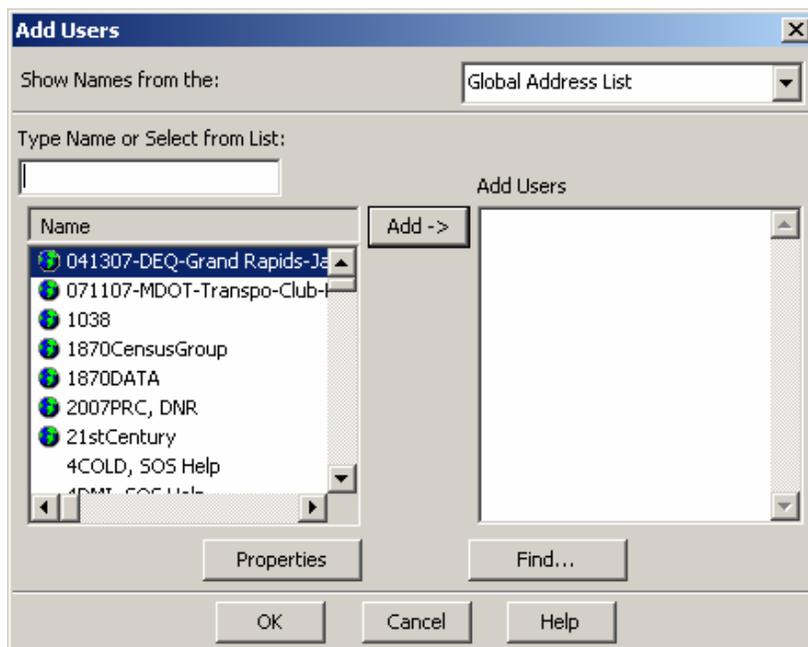
Outlook makes it possible for you to allow another person access to your Inbox and any other Outlook folder you want. This process of granting someone permission to access your folders, read and create items, and respond to requests is called *delegate access*.

You must grant these permissions before a delegate (staff member) may access any folders in your e-mail account.

1. To grant **delegate access**, click on **Tools, Options**.
2. Click on the **Delegates** tab.
3. Click on **Add**.



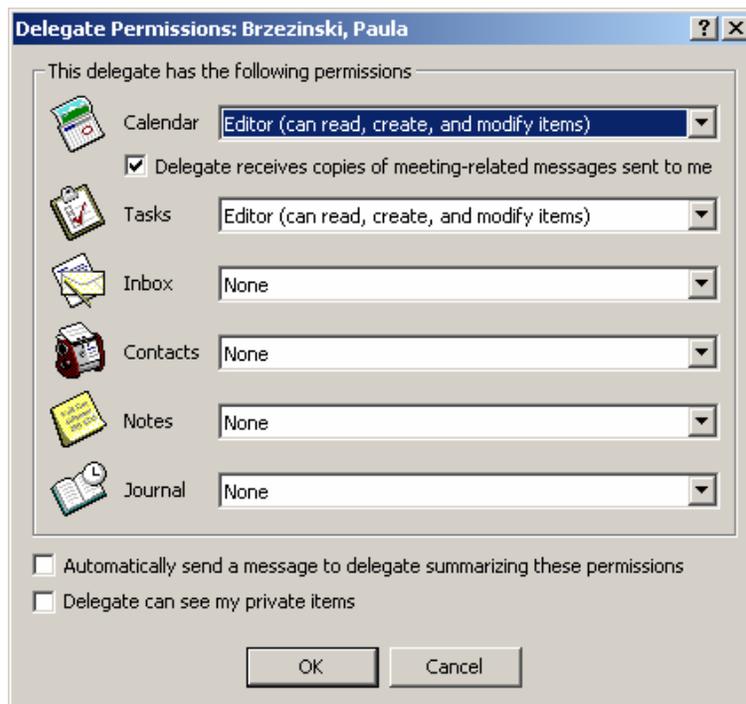
4. From Address Book, **select the staff you wish to delegate access to.**
5. **Click on OK.**



6. **Select the folder/area of Outlook you wish to provide access rights to.**
7. **Select the level of access for each Outlook folder.**

The options are:

- None
- Reviewer (can read items)
- Author (can read and create items)
- Editor (can read, create, and modify items)

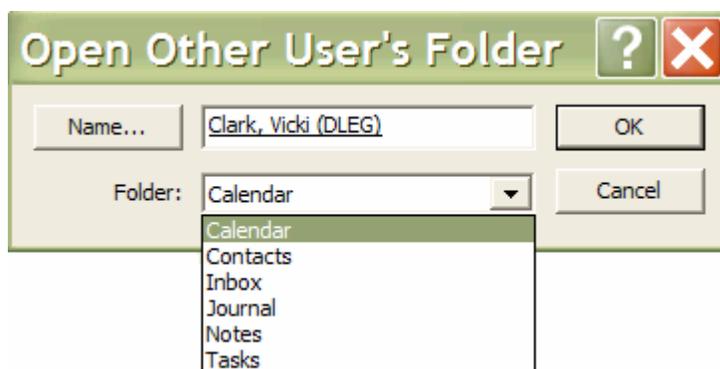


8. Select **Automatically send a message to delegate summarizing these permissions.**
9. Click on **OK.**

NOTE: This process needs to be completed for each staff member you are granting access.

XII. Proxying to Another User's Calendar

1. Click on **File, Open, Other User's Folder.**
2. **Type their name** or use the address book to find their name by **clicking on Name.**

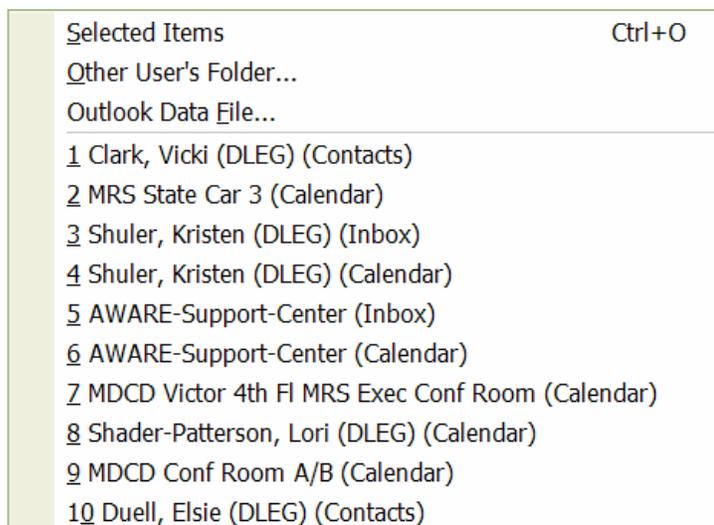


3. Select **Calendar** from the **Folder** drop-down list.
4. Click on **OK.**

NOTE: The other person must first give you access rights for you to proxy into their calendar.



TIP: Once you have performed this procedure, the person's name remains listed for future use by clicking **File, Open.**



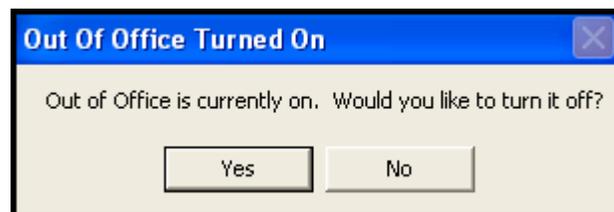
XIII. Using the Out of Office Assistant

When you're out of the office, use the **Out of Office Assistant** to manage your Inbox.



1. From your **Inbox** folder, **click** on **Tools, Out of Office Assistant**.
2. **Select** the option: **I am currently Out of the Office**.
3. **Type the message** you want to send to others while you are out in the **AutoReply reply only once to each sender with the following text** box.
4. **Click** on **OK**.

When you return and open Outlook, Outlook will automatically display the following message:



5. Select the option that fits your current status.

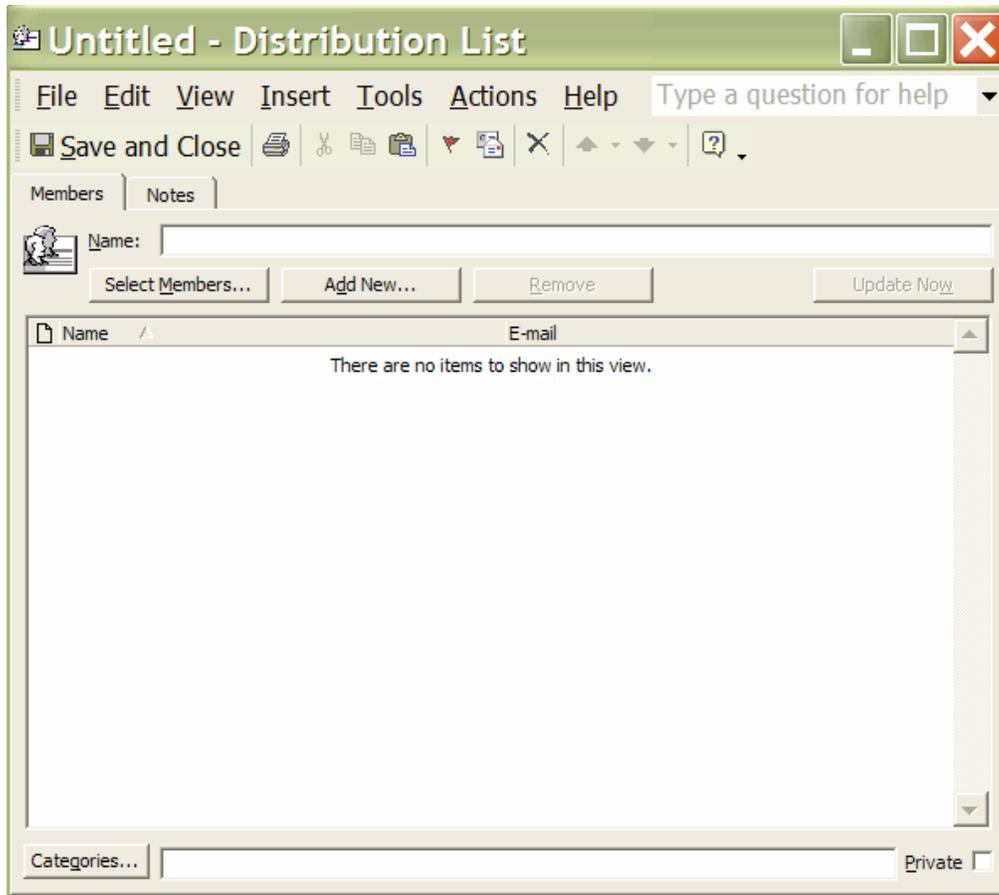
NOTE: *Now you don't have to remember to turn off your out of office rule. The system automatically lets you know you have one set!*

XIV. Creating Distribution Lists (Personal Groups)

A **Distribution List** is a collection of contacts. It provides an easy way to send messages to a group of people.

To create a Distribution List:

1. **Click on File, New, Distribution List.**



2. **Name your distribution List.** For example, if the group is all about training then name the Distribution list **Training**.
3. **Click on Select Members...** to open the Address Book and to select the names of staff you wish to make a member of this Distribution List.
4. After you have selected the desired names, **click OK**.
5. **Click on Save and Close.** Your new **Distribution List** will **appear in the Contacts folder**.

NOTE: *There is no cc option available when sending messages by using a Distribution List.*

XV. Archiving

Outlook keeps a copy of both created and received e-mail. To keep your mailbox manageable, you need to save these messages to your computer (they cannot be saved on a network drive.) You need to create an archive to save e-mail messages that are important. You also need a way to automatically move these items to an archive location. **AutoArchive** takes care of these processes for you.

AutoArchive is on by default and runs automatically at scheduled intervals.

 **TIP:** For staff members who utilize two computers will want to select the options **"Do you want to be notified before archiving?"** When you are at your home computer you select **'yes'**. When you are away from your home computer and the system asks you **"Do you to archive now?"** select **'no.'** This will ensure that your archives are located on one computer only.

Old items are those that reach the archiving age you specify, and may include such things as the original e-mail you received with the goals for a project you've been assigned to.

After Outlook archives items for the first time, you will access items in the file directly from **Archive Folders** in your **Outlook** Folder List. If you want, you may have separate archive files for individual folders.

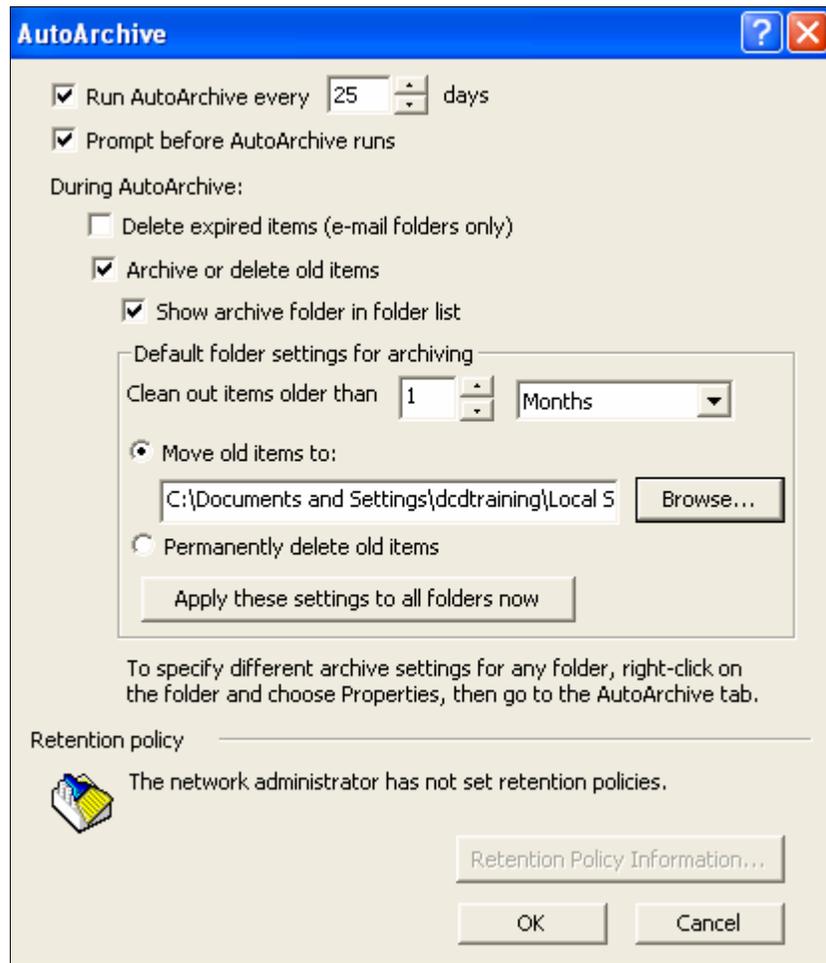
When you open the Archive Folders, you'll see that Outlook maintains your existing folder structure. **AutoArchive** is turned on by default. You may change its default settings as follows:

1. **Click on Tools Options**, and then **click** the **Other** tab.
2. **Click AutoArchive**.
3. Specify how often to run **AutoArchive**. We recommend a number less than 60 days.

AutoArchive may do one or both of the following for items in a folder:

- Permanently delete expired items.
- Delete or archive old items to an archive file.

4. Place a checkmark in the **Archive or delete old items**.
5. Place a checkmark in **Show archive folder in folder list**.



6. Select the **amount of time** you wish to have **your items archived**. In this example it is set to one month.
7. Click on **Move old items to:** The first time **AutoArchive** runs, Outlook creates the archive file automatically in the following locations: C:\Documents and Settings\yourusername\Local Settings\Application Data\Microsoft\Outlook\Archive.pst.

XVI. Accessing Outlook Via the Internet

To access your Outlook e-mail on the Internet using **Outlook Web Access**, type in the following address:

<https://owae2k.state.mi.us/exchange>

NOTE: It might be a good idea to save this address in your favorites for future use.

When the login screen appears, **type in your username** and **e-mail password**.
Your *password is the same password you use when logging onto your computer*.

The Internet version displays differently than the network version. An Internet packet is being developed.

XVII. Other Resources

Internal resources:

Contact Paula Brzezinski at (517) 335-5887 or Mary Luxton at (517) 373-2213 (or via e-mail) for assistance in using Microsoft Outlook 2002.

External resources:

- If you'd like to try some Microsoft Online Outlook courses, use the following link: <http://office.microsoft.com/en-us/training/CR061832721033.aspx>
- If you'd like to view the Outlook 2002 Help and How-to documents, use the following link: <http://office.microsoft.com/en-us/outlook/FX100647211033.aspx?CTT=96&Origin=CL100626971033>