Outlook Guide

E-Mail 1

Calendar 4

Tasks, Notes, and Reminders 7

Permissions 8

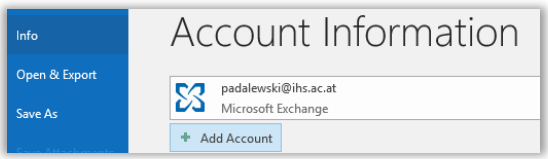
Delegate Access 10

Address Book 11

E-Mail

Adding an account

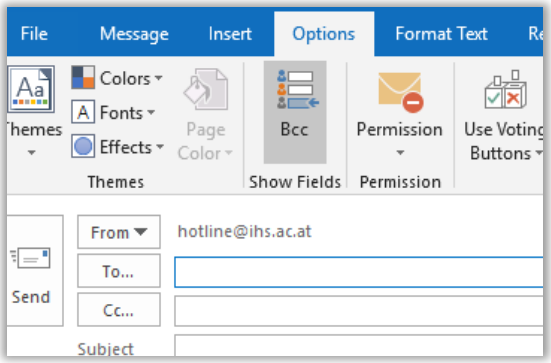
You can easily add a shared exchange mailbox (e.g. event@ihs.ac.at) to Microsoft Outlook if you have the permissions to access it.



1. On the **File** Tab click **Add Account**.
2. Fill in just the **email address** and click **Next**.
3. Click **Finish** and restart Microsoft Outlook to see the changes.

If you want to add a private email account, you have to fill in all information (name, email, password, etc.).

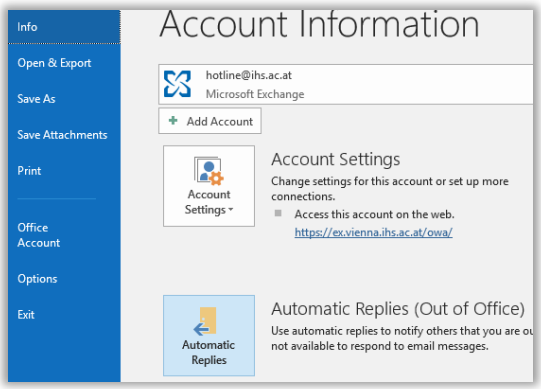
Inserting the “BCC”-field



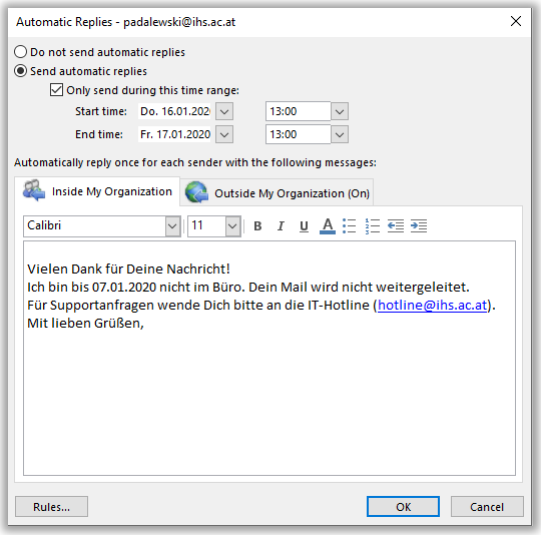
If you want to insert the “BCC”-field in an Email you have to click on the Options Tab and then on Bcc.

Now you can see a new field below “Cc…” where you can enter all blind-copy email addresses.

Out of Office-Assistant



1. The Out of Office-Assistant lets you automatically generate replies to incoming messages when you aren´t in the office.
2. For using the assistant go onto the **File** Tab and click onto **Automatic Replies**.



3. Select **Send automatic replies** and **only send during this time range**. Then use the Start Time drop-down list to specify the starting date and time when you will be out of office. Use the End Time drop-down list to specify the date and time that you will return to the office.
4. Click the **Inside My Organization** box, and then type your Out of Office reply.
5. Click **Outside My Organization** tab, and then specify the message you want sent to people outside your organization.
6. Click **OK**.

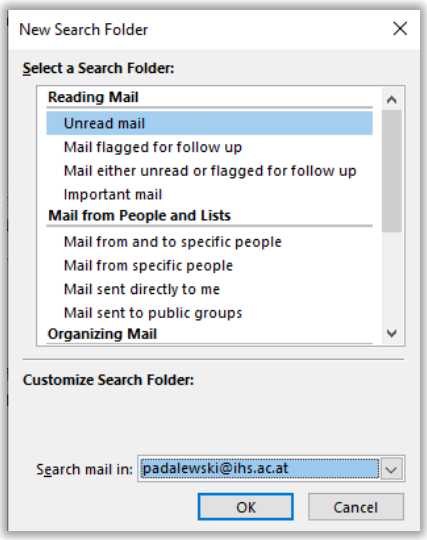
If you forgot to activate the Out of Office Assistant through Outlook, you can do so in OWA. If you forgot to activate the Out of Office Assistant through Microsoft Outlook, you can do so in Outlook Web Access (OWA). For detailed information, see www.ihs.ac.at/it , section “E-Mail and Calendar”, “Outlook Web Access Quick Guide”, paragraph “Set Automatic Replies”.

Signature

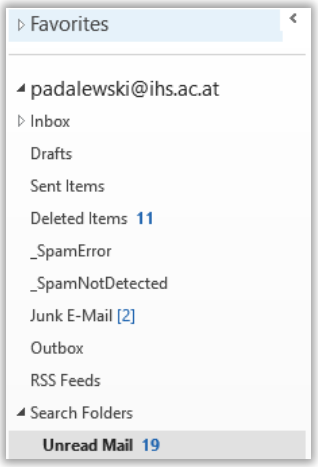
To set up your IHS signature, see www.ihs.ac.at/it , section “E-Mail and Calendar”, “Set up your IHS signature”.

All unread emails in one place

You can view all your unread email in just one “virtual” folder, working like a filter/summary of all your email that meets the criteria you define. These “virtual” folders are called Search Folders.



1. In the Outlook main window, select the tab **Folder**. Click **New Search Folder**.
2. Select **Unread mail** and select your account from the **Search mail in** drop down list.
3. Click **OK**.



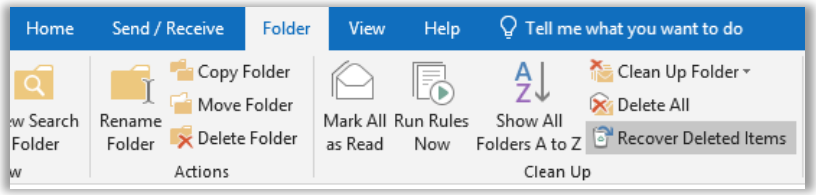
4. In your Navigation Pane you now see the expanded Search Folders that contain the new Search Folder **Unread Mail**.
5. For added visibility: Drag the Search Folder to your **Favorites** on the very top of the Navigation Pane.

Good to know: The messages themselves remain in the same place they used to be (usually your Inbox folder). If you delete a search folder (right-click → delete) only the Search Folder (the view) will be deleted. Your messages will not be affected.

Deleted items and recovery

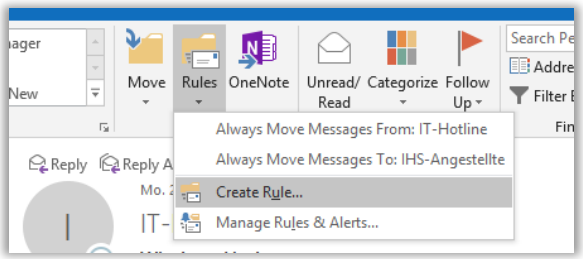
Deleted Microsoft Outlook items (such as email messages) can easily be recovered from the **Deleted Items** folder in the Navigation pane. Deleted items will be permanently deleted and removed from the folder after 30 days.

If the item in question has been Deleted from the **Deleted Items** folder in the meantime, you may still recover it within 14 days: Select the **Folder** tab and click on **Recover Deleted Items** in the **Clean Up** group.



Rules

Use Rules to automatically move email messages from or to a certain email address or with a certain subject to a certain folder.

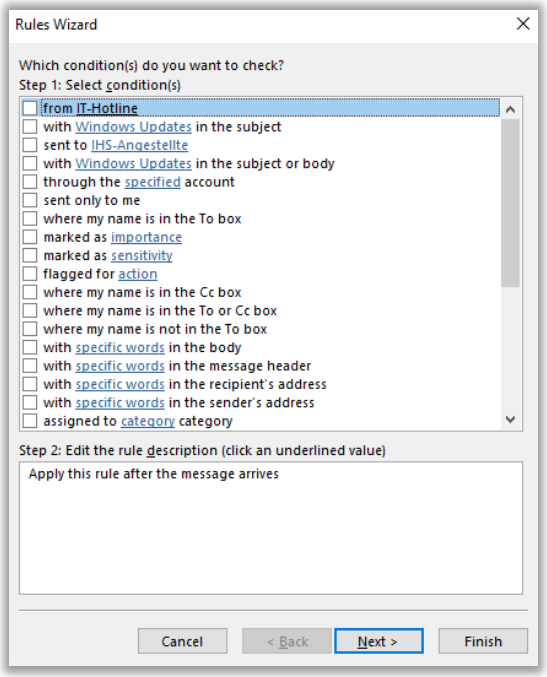


Select the **Home** tab and click on **Rules** in the **Move** group.

To quickly make a rule, select one of the **Always Move Messages** options.

For more complex or for different needs, click **Create Rule**.

To edit a rule, click **Manage Rules & Alerts**



If you selected Create Rule, you can do the following:

- set your preferences and click OK
- click Advanced Options to open the Rules Wizard. The Rules Wizard will guide you step-by-step.

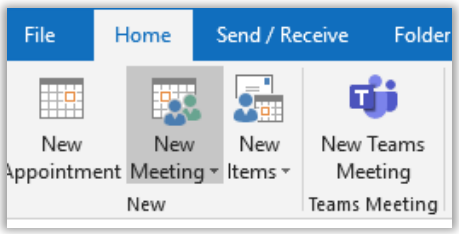
By using the Rules Wizard you can make Outlook show an alert window or play a sound for every message that arrives!

In addition, enable the option **When replying to a message that is not in the Inbox**: Select the Tab **File**, click **Options** and then **Mail**. Enable the checkbox **Save Messages to a reply in the same folder as the original message**.

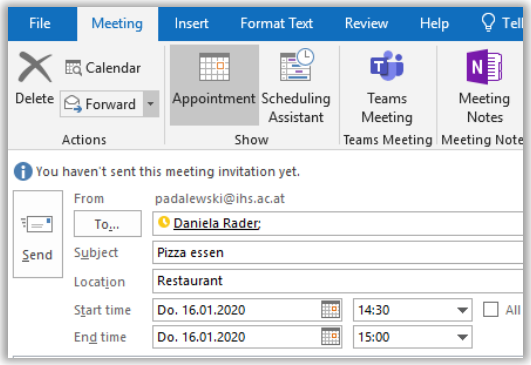
Calendar

Schedule a meeting

A meeting is an appointment that requires the presence of other people. Responses to meeting requests appear as email messages in your **Inbox**.



1. Go to your calendar. On the **Home** tab click **New Meeting**.



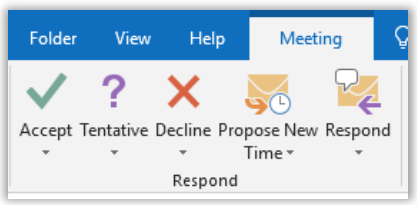
2. In the **Meeting** window, enter the **Subject** and the **location** of the meeting and specify the date and time when the meeting will be held.
3. In the **To** field enter the usernames of the persons you want to invite to the meeting.
4. Click **Send** when you're finished.

Cancel a meeting

If you need to cancel a meeting for any reason, open the Calendar, right-click on the meeting in your calendar and select **Cancel Meeting**. All attendees will receive an email notification telling them that the meeting has been cancelled.

Accept a meeting request

When you receive a meeting request, double-click on it and you will see a preview of the calendar, showing the meeting request and all adjacent and conflicting calendar items.



You can either **Accept**, **Tentative**, **Decline**, **Propose New Time** or only **Respond** to this request.

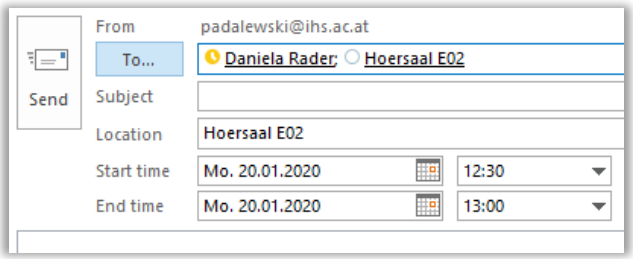
When you choose to accept, tentatively accept, or decline a meeting request, there are three options:

- **Send the response right now** (which sends the default response)
- **Edit the response before sending** (which allows you to send a custom response)
- **Do not send a response**

You may also propose a new meeting time for a meeting invitation you have received. Click **Propose New Time**, and then choose **Tentative And Propose New Time** or **Decline And Propose New Time**, depending on whether you want to accept or decline the invitation.

Booking a room

When you schedule a meeting or appointment you may also book a room for it.

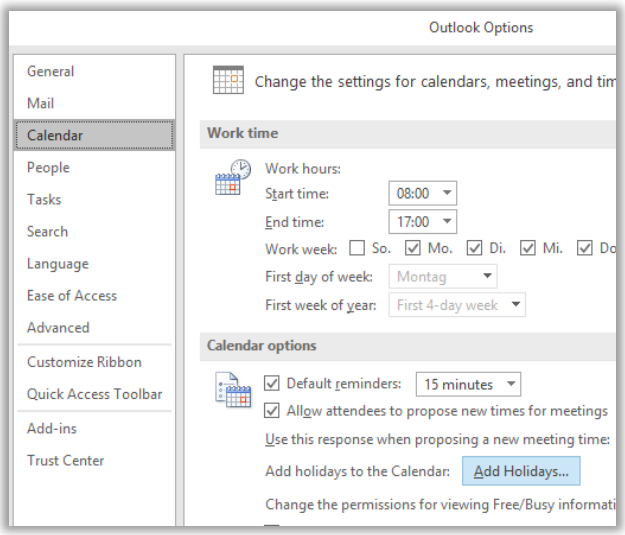


1. Invite the room as an attendee (add it to the **To** field).
2. You may use the Address book to find it (e.g. “Hoersaal E02”). The **Location** field will automatically be filled out.

The Präsidium cannot be booked.

If you want to book the Salon, please refer to the Adminteam for further information.

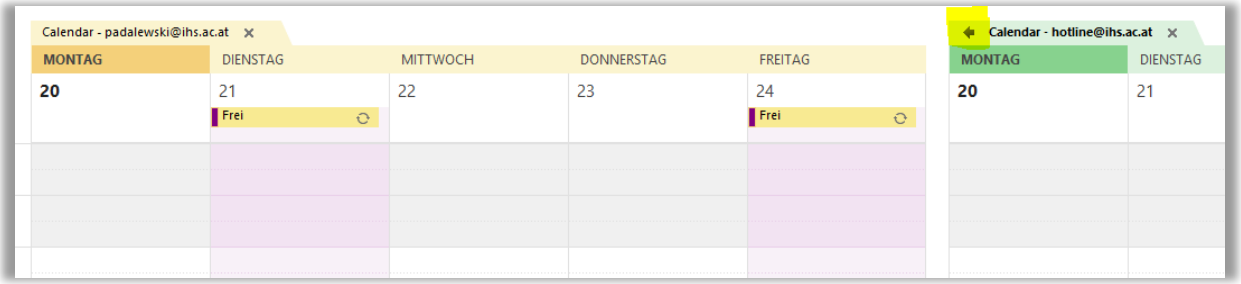
Adding holidays to the Calendar



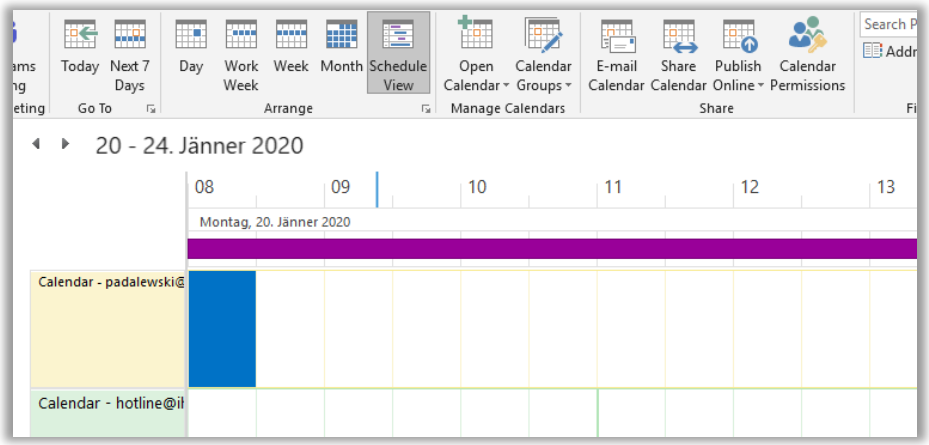
1. For adding holidays to your calendar, go to the **File** Tab and click **Options**.
2. Now you have to change into the **Calendar** Tab and click onto the **Add Holidays** button.
3. Now you can select the State (e.g. “Austria”) from which you want to import the holidays and click OK.

Calendar Views

If you want to overlay the calendars you only have to click the arrow beneath the name of the shared calendar. Now all three calendars are in “Overlay Mode”.

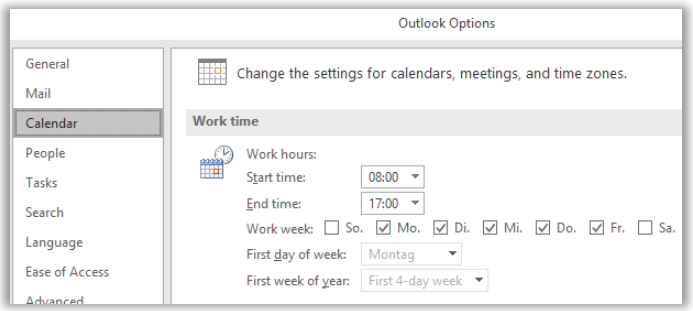


If you want to create a meeting request and you want to view in advance whether the attendees have the time for it, click onto **Schedule View**.



This timetable will show you the Free / Busy information of all the people selected.

Work week



1. In the **File** tab, click **Options** and select **Calendar**. In the **Work time section** set your work hours.
2. Confirm with **OK**.
3. Switch to your calendar. On the **Home** tab select **Work Week** to see the changes.

Tasks, Notes, and Reminders

Create a task

You can manage your tasks in Microsoft Outlook, set reminders and track a task's progress. Go to **Tasks** in your Navigation Pane (on the left at the bottom). On the **Home** tab click **New Task**.

Create a note

Notes are the electronic equivalent of paper sticky notes. Go to **Notes** in your Navigation Pane (on the left at the bottom). On the **Home** Tab click **New Note**.

Set a reminder

- **For tasks**: Open a task item. Tick the **Reminder** checkbox and specify the date and time when the reminder should go off. To disable the **Reminder,** untick the Reminder checkbox.
- **For appointments or meetings**: Open your appointment or meeting. Go on the **Appointment** or **Meeting** tab. In the **Options** group you'll find a **Reminder** drop-down list where you can

specify when the alarm should go off (e.g. “15 minutes” before). To disable a reminder, select **None**.

- **For email messages**: Select an email, go on the **Home** tab. In the **Tags** group, click **Follow Up**, and then click **Add Reminder**.

Permissions

IHS Calendar Sharing Policy

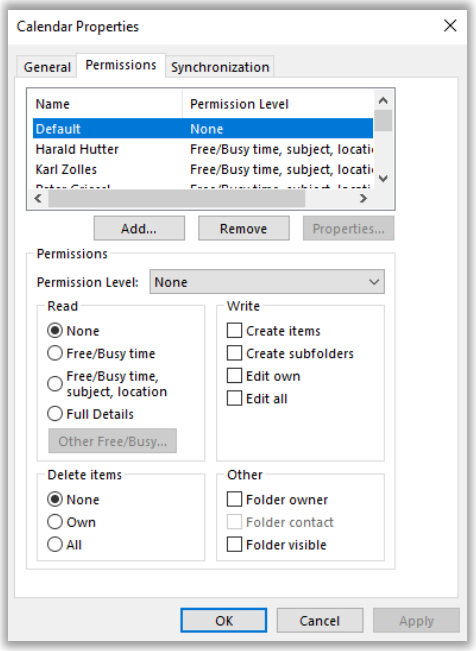
The IHS Calendar Sharing Policy has the following setting:

1. By default, nobody may view a calendar without the owner’s permission.
2. Private appointments cannot be viewed by anyone but the owner.
3. Appointments of added calendars will show information about Free / Busy state. The owner may extend/ limit/ withdraw these permissions at any time.

IHS-IT will NOT change any individual calendar permissions settings without explicit consent of the owner, communicated to IHS-IT by the owner her-/himself in written form.

Only the owner of the calendar can allow access to their calendar or calendar details on their own, or ask IHS-IT to change the permissions.

Share a Calendar



1. Select the calendar you wish to set sharing permissions for, right-click, choose **Properties** and then click on the **Permissions** tab.
2. This will open the **Calendar Properties** dialog on the left. As you can see, Default (every other user) is set to **None** (Permission Level drop-down), which means they cannot see anything of your calendar.
3. To share a calendar with another user (=grant permissions) click on the **Add…** button.
4. Select the user from the **Global Address List**, click **Add** and then **OK**.
5. Choose the **Permission Level** for the user (for detailed information, please read the following section).

Calendar Permission Levels

Below are detailed explanations of the specific permission levels you can give to individuals with access to your calendar.

Read

Read refers to what a person can *see* in your calendar.

- **None** - Users cannot see *any* of your appointments, including neither if you are free or busy. This can only be set for all users (the name, "Default"), not for individuals; your calendar cannot be opened in the schedule assistant.
- **Free/Busy time** - Individuals can see if you have an appointment at a certain time, but cannot see the location nor the subject of the appointment.
- **Free/Busy time, subject, location** - Individuals can see your appointments, including their subject/title, and location.
- **Full Details** - Individuals can view all information about an appointment.

Write

This set of permissions refers to whether or not one can create events in your calendar, and modify these entries. You can select more than one option at a time.

- **Create items** - Individuals can create appointments and meeting requests on your calendar.
- **Create subfolders** - *Not Applicable*
- **Edit Own** - Individuals can modify/change any items they created in your calendar, such as appointment time, subject, etc.
- **Edit All** - Same as above, plus the permission to edit all entries created by yourself and other users.

Delete Items

- **None** - Individuals cannot remove entries in your calendar, regardless of whether or not they created it.
- **Own** - Individuals can delete any entry they created.
- **All** - Individuals are allowed to delete all entries, even those you have created.

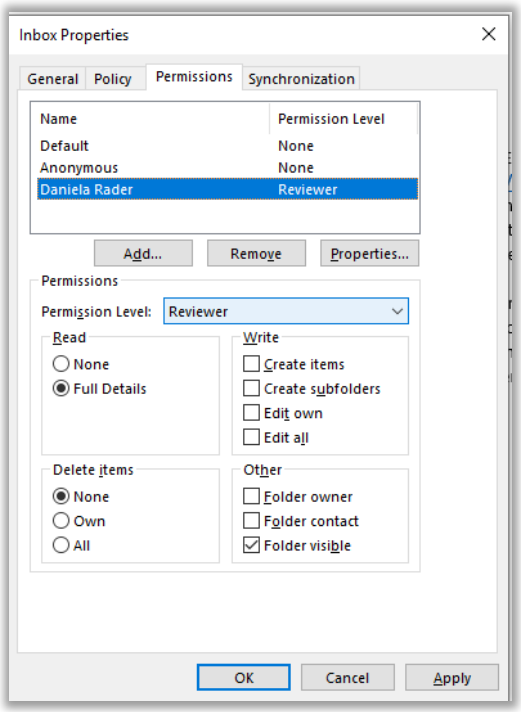
Folder

- **Folder Visible** - This option will automatically be selected if you are a "Contributor" or are granted a higher permission level. It allows one to open an entire calendar including the ability to see the details of meetings. **This is required in order to view the calendar.**

Delegate Access

On your mailbox

WARNING: **The settings described in the following will reveal your privacy!** If you're receiving business mail as well as private mail you should leave the following settings at their defaults! Please keep in mind that you cannot be forced to give delegate access to your mailbox. Don't hesitate to contact the Employee's Council if you are in doubt about your rights!



1. Right-click on a mailbox or folder name, choose **Properties** and then click on the **Permissions** tab.
2. Click on the **Add...** button.
3. Select the person you want to give delegate access, click **Add** and then **OK**. You need to grant at least the **Reviewer** permission in the **Permission Level** drop-down.
4. Click **OK**. The delegate can now add your mailbox to his/her folder list.

Note: You can set different permission levels for individual folders in your mailbox, using the method described above.

On your calendar

In Outlook, you can set up Delegate Access to your Calendar allowing people you choose to see, edit, or send items on your behalf including creating and responding to meeting requests.

Three types of delegates

Editor	**Create, read, modify and delete your Calendar items.** When you make someone an editor, you may also decide to have that person receive meeting related email messages that are sent to you. An editor can create meetings and accept or decline meeting requests on your behalf. You may allow a delegate with editor access to view items that you have marked as private (private items can only be viewed by the editor).
Author	**Create and read your Calendar items.**

An Author can create new meetings in your calendar but is unable to modify existing calendar items or to change anything else.

An Author is less powerful than an Editor.

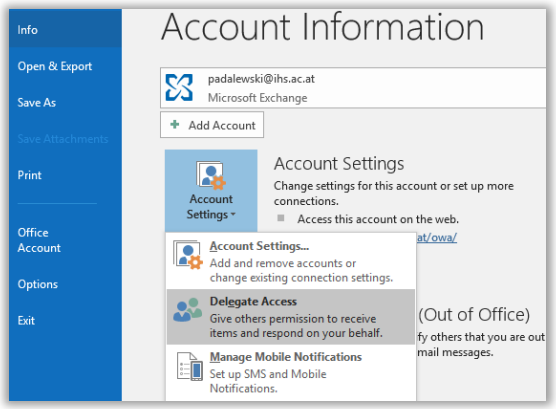
You may allow a delegate with author access to view items that you have marked as private (private items can only be viewed by the author).

Reviewer	**Read items only.**

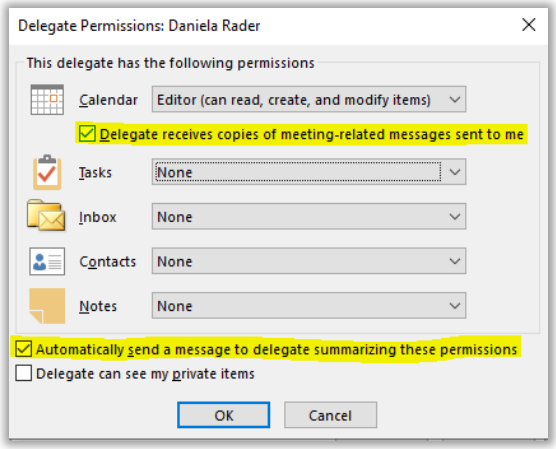
A reviewer can view your Calendar but cannot make any changes to it.

You may allow a delegate with reviewer access to view items that you have marked as private (private items can only be viewed by the reviewer).

To delegate access



1. To delegate access to someone, switch to your calendar. Go to the **File** tab and click the **Account Settings** button (located under **Account Information**). From the drop-down list, select **Delegate Access**.
2. In the **Delegates** window, click on the **Add** button.
3. The Global Address List will open. Select the person to whom you would like to give delegate access, click **Add** and then **OK**. This brings up the **Delegate Permissions** window.

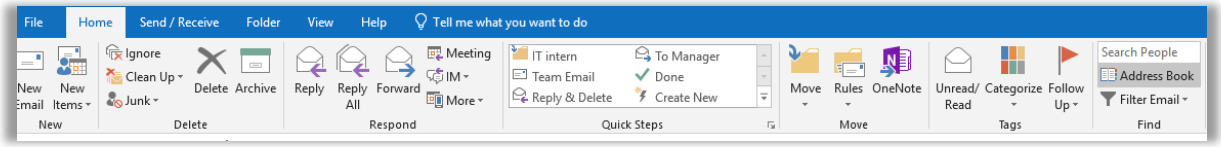


4. Open the drop-down menu next to **Calendar**. You will be presented with the three mail options (Editor, Author, Reviewer) described in the table above. The fourth option None means that the delegate will not be able to access the calendar feature of your account.
5. To have a delegate receiving copies of meeting-related messages that are sent to you, please tick the checkbox **Delegate receives copies of meeting-related messages sent to me**. Please note the two checkboxes at the very bottom of the dialog and select your preferred option.

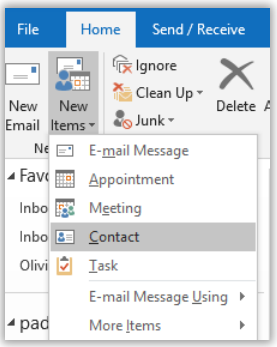
Address Book

The Global Address List (GAL) presents the list of mailboxes on the server as well as other address items created, including distribution groups and external addresses. Users cannot create address information in the GAL.

You can find the Address Book in the **Home** tab on the very right within the **Find** group.



Creating Address Book Entries

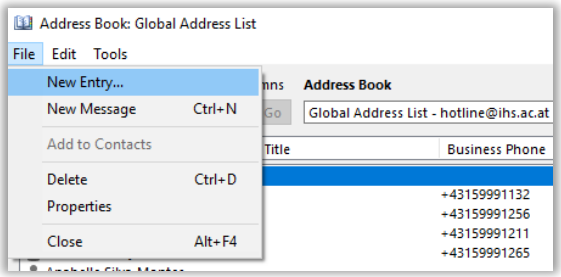


To create a contact quickly while you are composing a message, type the email-address in the **To**, **Cc** or **Bcc** field, and then press **TAB**. Right-click the email-address and select **Add To Outlook Contacts**.

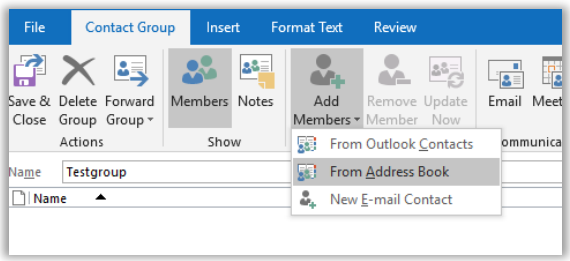
You can also create a new contact from the navigation pane. To do this, select the drop-down arrow from the **New Items** button on the **Home** Tab and choose **Contact**.

Using Contact Groups

If you often send messages to groups of people, you can create a contact group (like a self-managed local distribution list).



1. Open the Address Book
2. Choose **File** and **New Entry**.
3. Select **New Contact Group** and choose from the drop-down list in which address book (e.g. your personal one) you want to store the contact group. Click **OK**.
4. In the Name box, specify a name for the group.



5. If the contact already exists, click **Add Members** and choose **From Address Book** or **From Outlook Contacts**
6. If the contact doesn't exist, click **Add Members** and choose **New E-Mail Contact**.
7. Click **Save & Close**.