

# Unsupported Entourage Features Guide



Please note that the features mentioned in this guide are not supported by the IT Services Department. Do not contact the IT Services Helpdesk for assistance with using these features.

DRAFT

The information (data) contained in all sheets of this training document constitutes a trade secret and/or information that is commercial or financial and confidential or privileged. It is furnished to the CUSTOMER in confidence with the understanding that it will not, without permission of the offerer, be used or disclosed for other than evaluation purposes; provided, however that in the event a contract is awarded on the basis of this evaluation, the CUSTOMER shall have the right to use and disclose this information (data) to the extent provided in the contract. This restriction does not limit the CUSTOMER's right to use or disclose this information (data) if obtained from another source without restriction.

## Table of Contents

Tasks .....	4
Task Management.....	4
Adding a Task.....	4
Update a Task.....	4
Editing a Task .....	5
Sorting Tasks.....	5
Notes and Journal.....	6
Notes Development.....	6
Creating a Note.....	6
Moving a Note.....	<b>Error! Bookmark not defined.</b>
Assigning Contacts to a Note.....	6
Resizing a Note.....	<b>Error! Bookmark not defined.</b>
Assigning Categories to a Note .....	8
The Journal.....	<b>Error! Bookmark not defined.</b>
Using the Journal .....	<b>Error! Bookmark not defined.</b>
Creating New Journal Entries .....	<b>Error! Bookmark not defined.</b>
Meetings, Appointments and Events.....	10
Appointments.....	11
Adding an Appointment to the Calendar .....	11
Inviting Attendees .....	12
Editing an Appointment.....	13
Setting Recurring Appointments .....	13
Assigning a Category to an Appointment.....	14
Deleting an Appointment.....	15
Saving a Calendar as a Web Page.....	<b>Error! Bookmark not defined.</b>
Events.....	16
Scheduling an Event.....	<b>Error! Bookmark not defined.</b>
Removing an event.....	17
Meetings .....	17
Scheduling a Meeting .....	<b>Error! Bookmark not defined.</b>
Changing an Existing Meeting .....	17
Replying to a Meeting Request.....	18
Tracking Meeting Responses .....	19
Updating a Meeting.....	<b>Error! Bookmark not defined.</b>
Cancelling a Meeting .....	20

# Tasks

## Task Management

### Adding a Task

- From the main menu, choose **File > New > Task** to open a new **Task** form:

The screenshot shows a dialog box titled "Untitled" with a checkmark icon. The toolbar includes "Save", "Print", "Delete", "Categories", and "Projects". The "Task:" field contains "Untitled". There are three checkboxes: "Complete", "Due date", and "Reminder". The "Due date" and "Reminder" fields are set to "Tue, Apr 29, 2008". The "Priority:" dropdown is set to "Normal", and the "Occurs:" dropdown is set to "Once Only". At the bottom, there is a "Notes:" section with a large empty text area.

- Enter the following information into the Task dialog box:

**Subject** – Example of New Task

**Due Date** - Mon 10/11/2003

**Reminder** – Fri 07/11/2003 at 09:00

**Priority** - Set the priority of the task, to **Low**.

- Click on **Save** to save the task.

### Update a Task

- Click on the **Tasks** button in the **Navigation Pane**.

- Click on the triangle to the left of **Task Views**.
- Click on the **Overdue** option in the Navigation Pane.
- Double-click on the **Example of New Task** on the right.
- Change the **Reminder** to a date and time in the future.
- Click **Save** and then close the window.

---

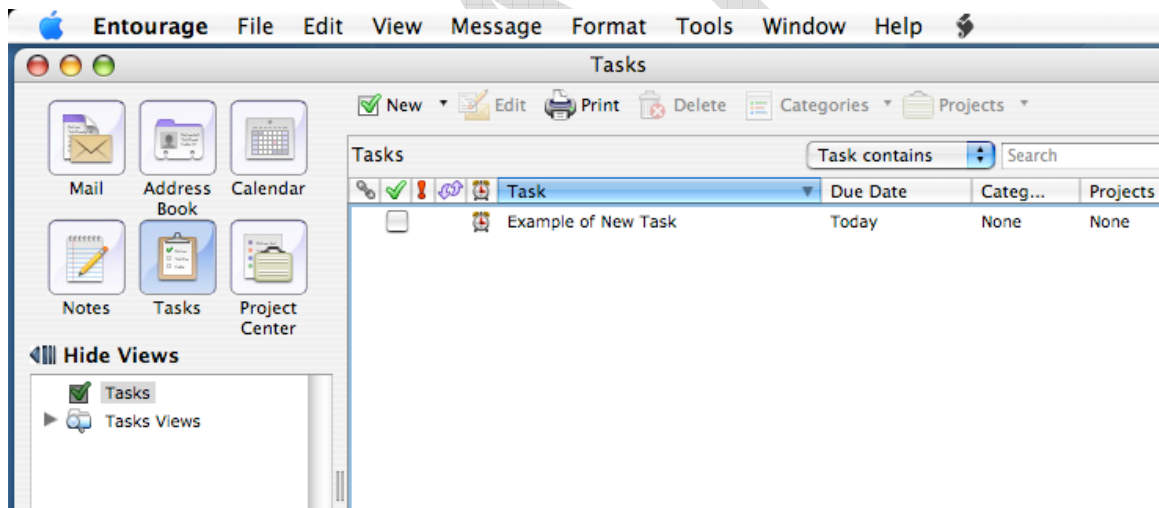
## Editing a Task

- Click on the **Tasks** button in the Navigation Pane.
- Double-click on the **Example of New Task**.
- Change the **Priority** to high.
- Click **Save** and close the window.

---

## Sorting Tasks

- Click on the **Tasks** button in the Navigation Pane.
- Click the column header to change task sort by.
- Click column header to reverse sort by order.

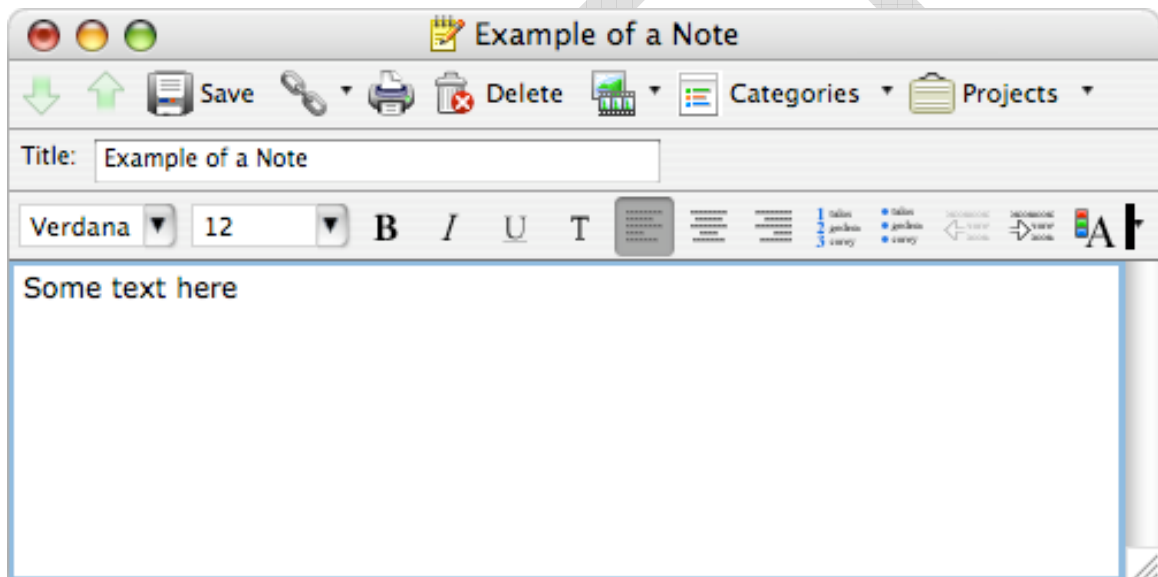


# Notes and Journal

## Notes Development

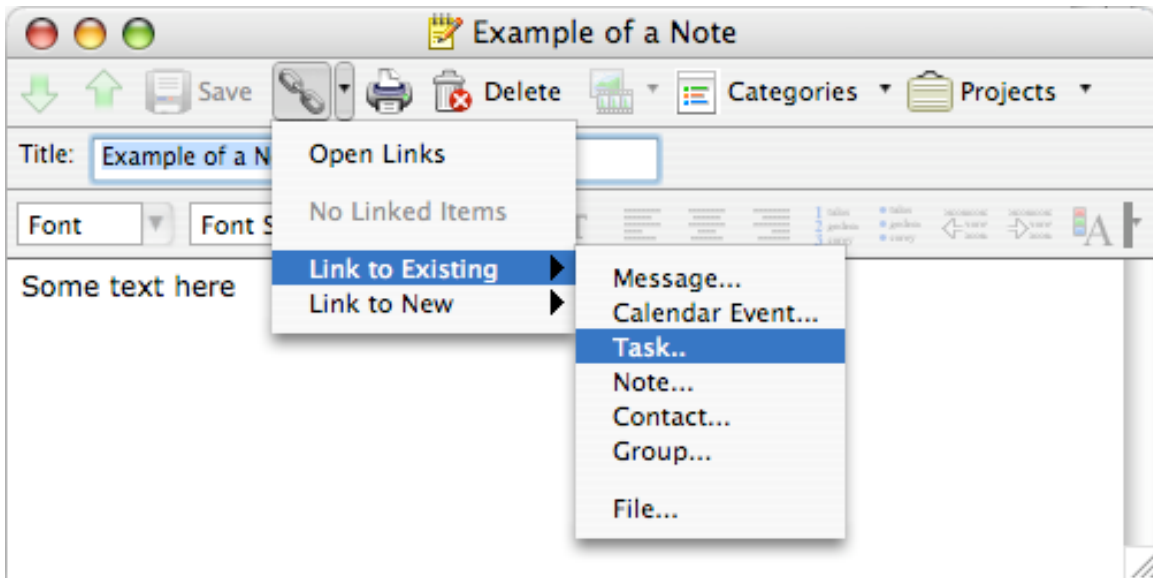
### Creating a Note

- Click on the **Notes** icon in the **Navigation Pane** to open the **Notes** view in the main viewing area. If there are no notes, the viewing area will be empty.
- From the main menu, choose **File > New > Note**
- Type **Example of a Note** in the Title field of the note.
- Click **Save** followed by close.

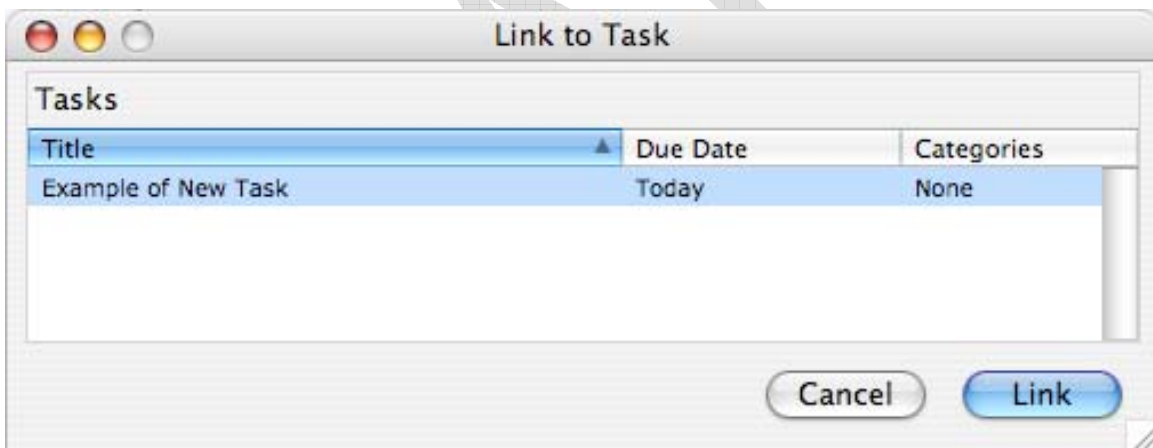


### Assigning Items to a Note

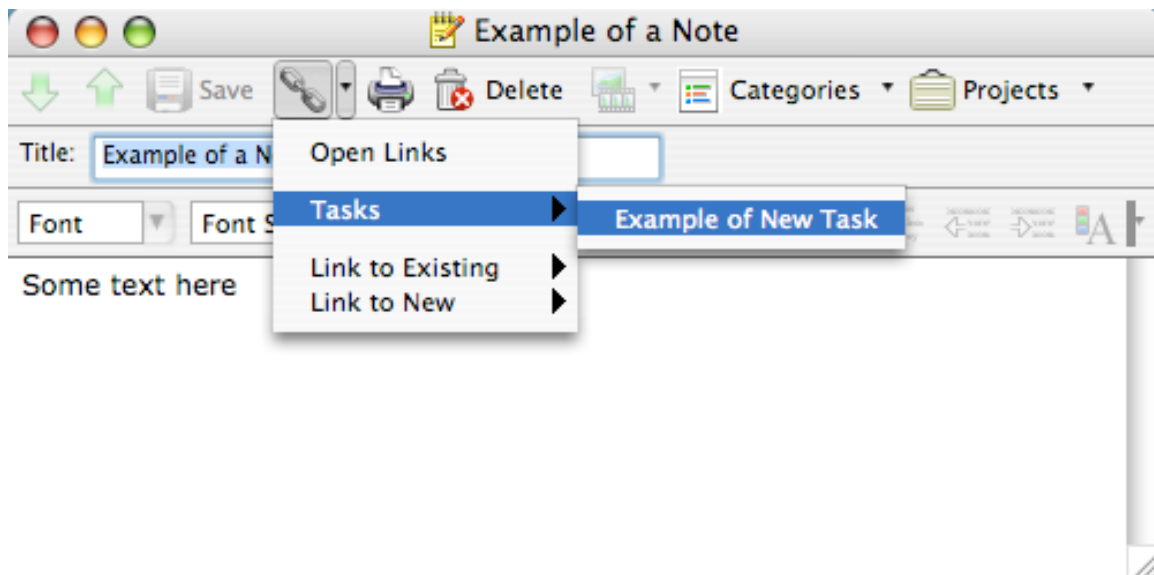
- Open **Example of a Note** by double clicking it.
- Click on the arrow to the right of the **Link** icon in the toolbar to open the drop-down menu.
- Select **Link to Existing > Task**:



- This will open the **Link to Task** dialog box:



- Click on **Example of New Task** followed by the **Link** button.
- Confirm that the task has been attached to the note by clicking the arrow to the right of Link button and there should be **Example of New Task** listed:

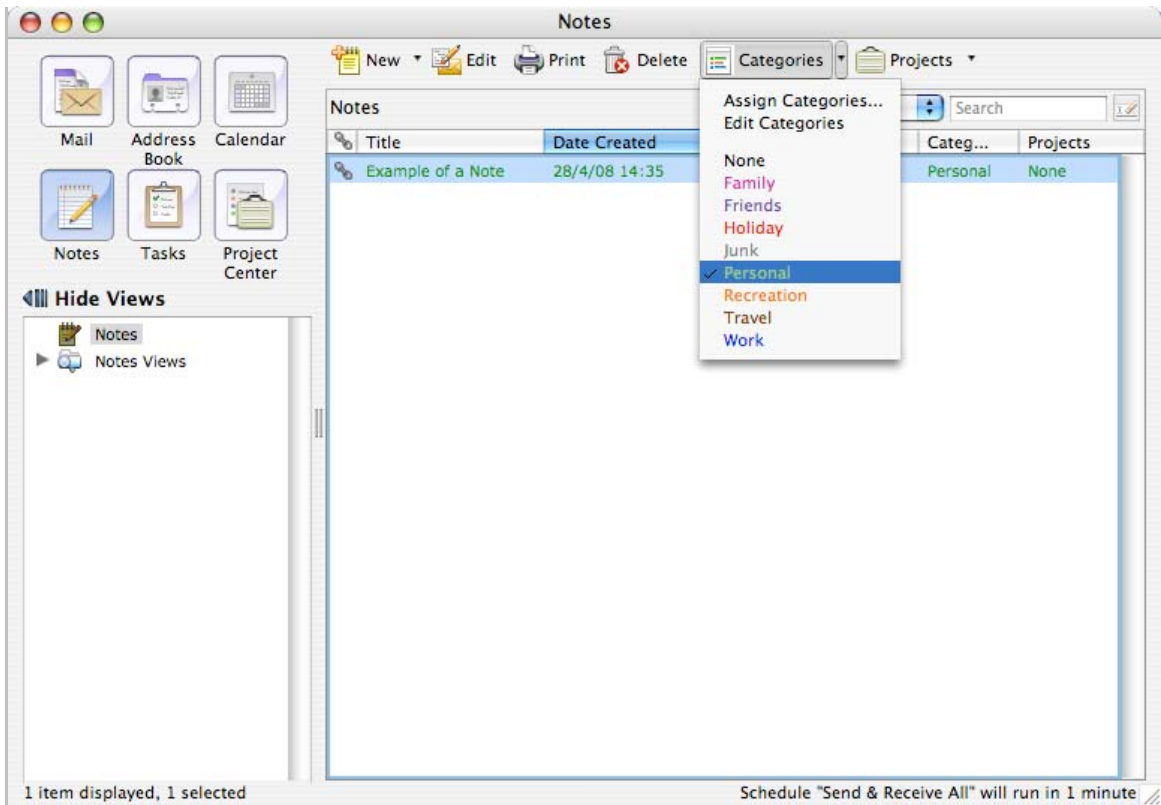


- Close the note.

---

### Assigning Categories to a Note

- Click on **Example of a Note**.
- From the toolbar, click the downward facing arrow to the right of **Categories** to display the different options.
- Select **Personal** from the options listed area.
- The text colour will change to green for **Personal**:



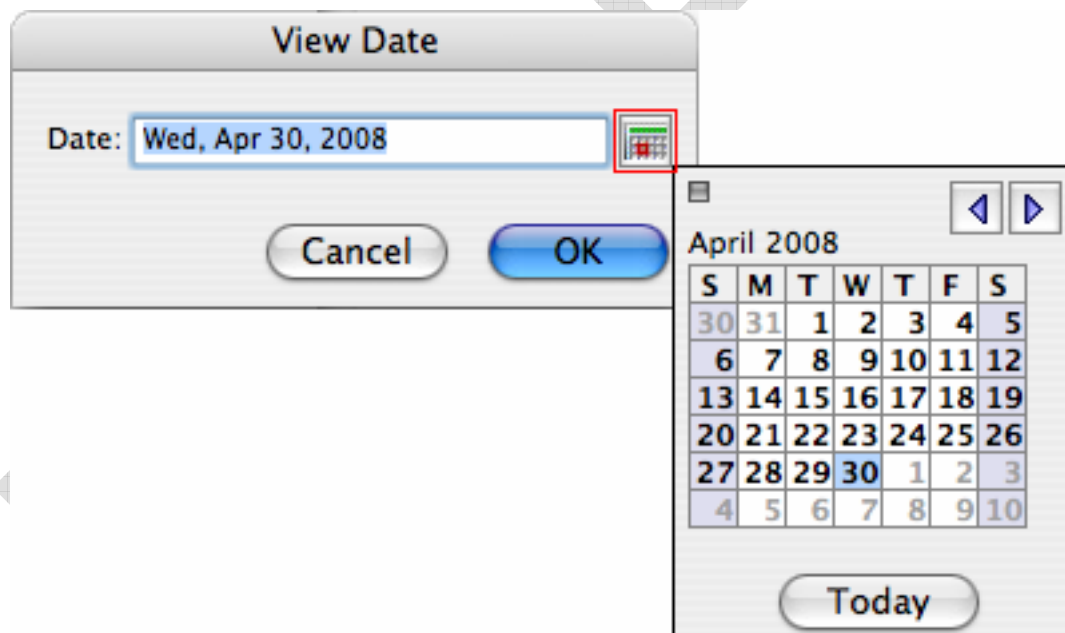
DRAFT

# Meetings, Appointments and Events

## Calendar Environment

### Views and Date Selector

- There four main view options available from the toolbar: day, work week, week and month.
- Click on **Work Week** to view the calendar from Monday through to Friday.
- Click on **Month** to view the calendar from the month.
- The **Date Selector** allows you to move to a particular date without having to scroll through.
- Click on **View Date** to display the **View Date** dialog box.
- Click the calendar image to bring up a pop up calendar and select the date you wish to view:



- Click **Ok** to view the calendar for the selected date.
- Use the **Date Navigator** in the **Navigation Pane** to browse through and select a date to view.
- Use the forward and backward facing arrows in the toolbar to navigate through the calendar:



## Appointments

Entourage uses the same word for all types of entries in your Calendar. The type of event will change according to certain things are applied:

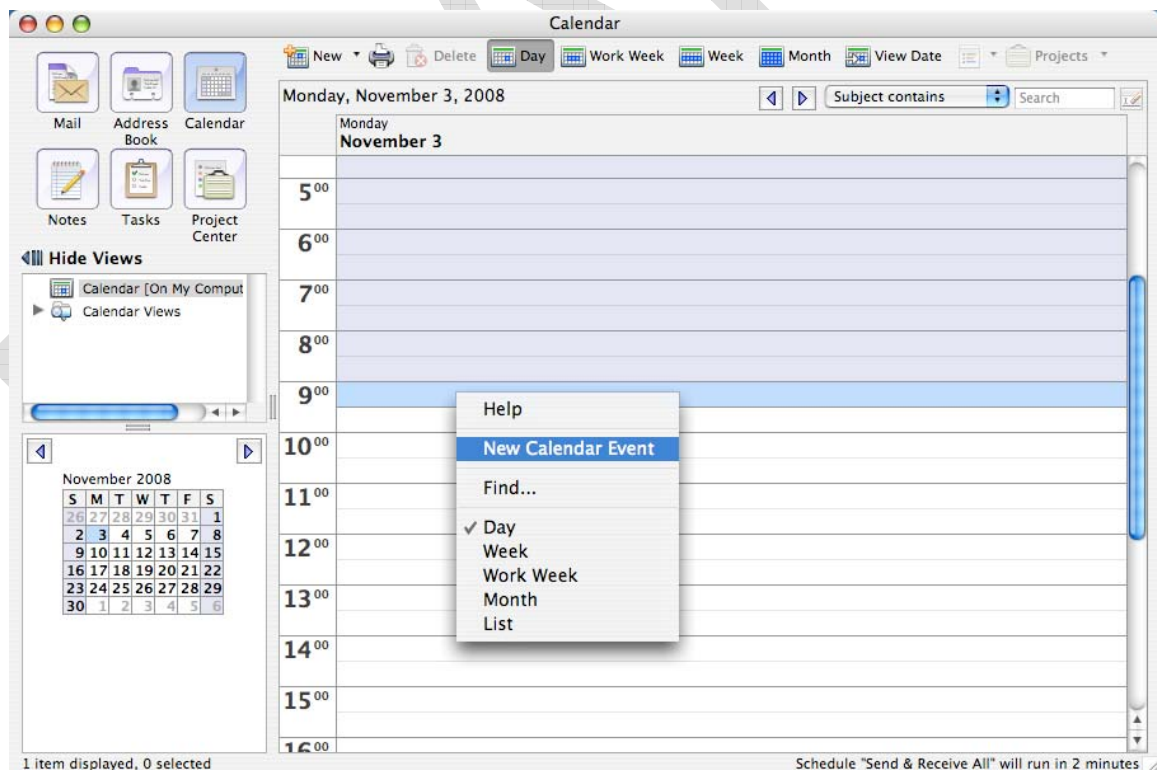
- **Appointment:** a calendar entry that occurs at a specific time without inviting others.
- **All Day Event:** a calendar entry that can occur all day.
- **Meeting:** a calendar entry that occurs at a specific time and others have been invited.

All types of events are created using the **New Event** window. By ticking the all day event check box an event becomes an **All Day Event**, and by inviting people to an **Appointment** it becomes a **Meeting**.

---

### Adding an Appointment to the Calendar

- Open the **Calendar** view by clicking on the **Calendar** icon in the **Navigation Pane**.
- Click the **Day View** button.
- Use the arrows in the **Date Navigator** until **November 2008** is showing.
- Select **3 Nov 2008** from the **Date Navigator**.
- Click on the **9:00** time slot:



- Ctrl + click to open the **Calendar** popup menu, and select **New Calendar Event**.

- Enter the following information:

**Subject** - Example of New Appointment

**Location** - Boardroom

**Start time** – Leave as default

**End time** – Leave as default

**Reminder** – Leave as default

**Occurs** – Leave as default

Example of New Appointment

Invite Save Link Print Delete Insert Options Categories Projects

Subject: Example of New Appointment

Location: Boardroom

Start: Mon, Nov 3, 2008 09:00 All-day event

End: Mon, Nov 3, 2008 09:30 Duration: 30 minutes

Occurs: Once Only

Reminder 15 minutes

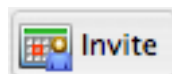
Travel time

- Click **Save** and close window.

---

## Inviting Attendees to a Meeting

- Open the **Calendar** view by clicking on the **Calendar** icon in the **Navigation Pane**.
- Click the **Day View** button.
- Use the arrows in the **Date Navigator** until **November 2008** is showing.
- Select **3 Nov 2008** from the **Date Navigator**.
- Double click on **Example of New Appointment**.
- From the toolbar, click the **Invite** button:



- In the **To** field enter the email address of the person you would like to invite to the meeting:

The screenshot shows a window titled "Example of New Appointment". At the top, there is a toolbar with icons for "Send Now", "Save", "Print", "Insert", "Categories", and "Projects". Below the toolbar, the "Invite" field contains two email addresses: "j.bloggs@gold.ac.uk" and "j.doe@gold.ac.uk". The "Subject" field is empty. The "Location" field has buttons for "+ Add", "X Remove", and a "Check Names" icon. The "Start" field is empty. The "End" field is empty. The "Occurs" field has a "Reminder" checkbox checked with a value of 15 minutes, and a "Travel time" checkbox unchecked. The "Attachments" field shows "none".

- Click **Send Now**.

---

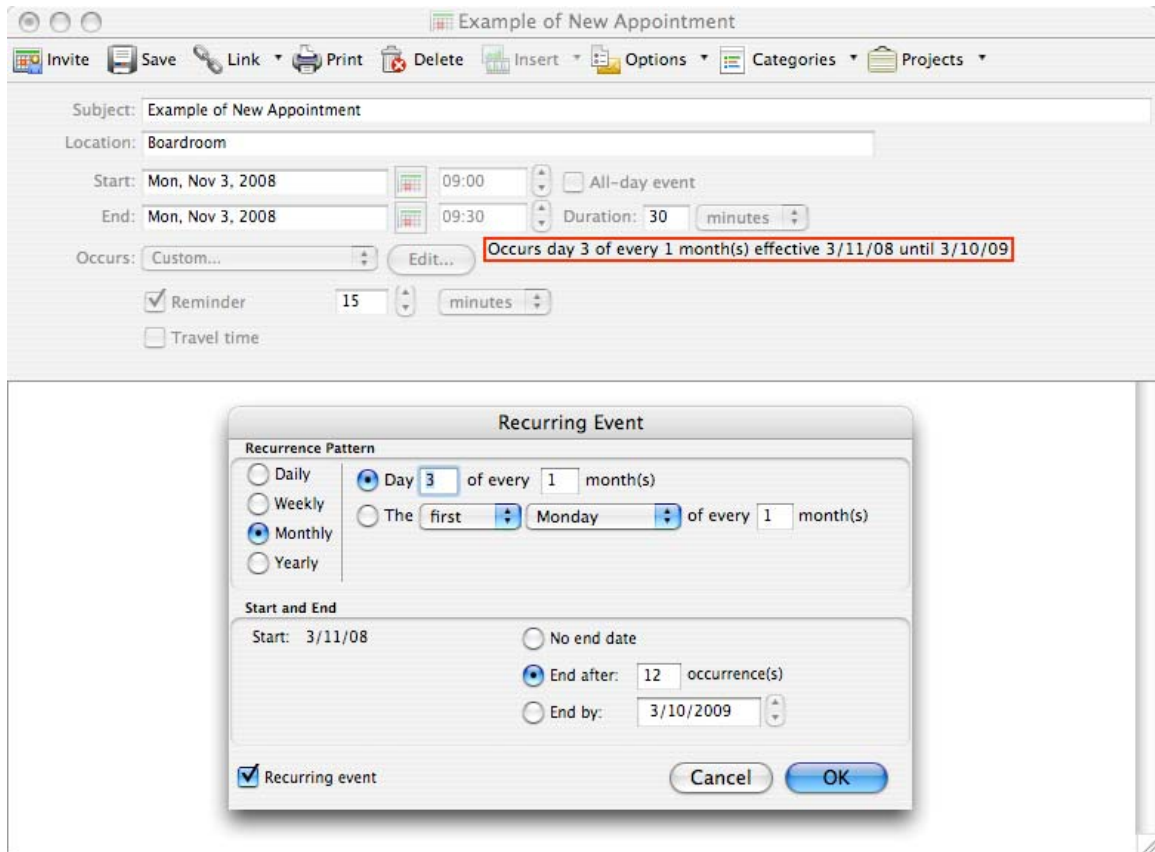
### Editing an Appointment

- Click on the **Calendar** button in the Navigation Pane.
- Select 3 **Nov 2008** from the **Date Navigator**
- Double click on **Example of New Appointment** to open the appointment.
- Change the end time to **10:00** by clicking in the text box and keying in the numbers.
- Click **Save** and close.

---

### Setting Recurring Appointments

- Click on the **Calendar** button in the Navigation Pane.
- Select 3 **Nov 2008** from the **Date Navigator**
- Double click on **Example of New Appointment** to open the appointment.
- Select an option from the drop down list or select **Custom** if none match.
- Enter the following information:



**Appointment** time options – Leave as Default

**Recurrence pattern** options –Monthly

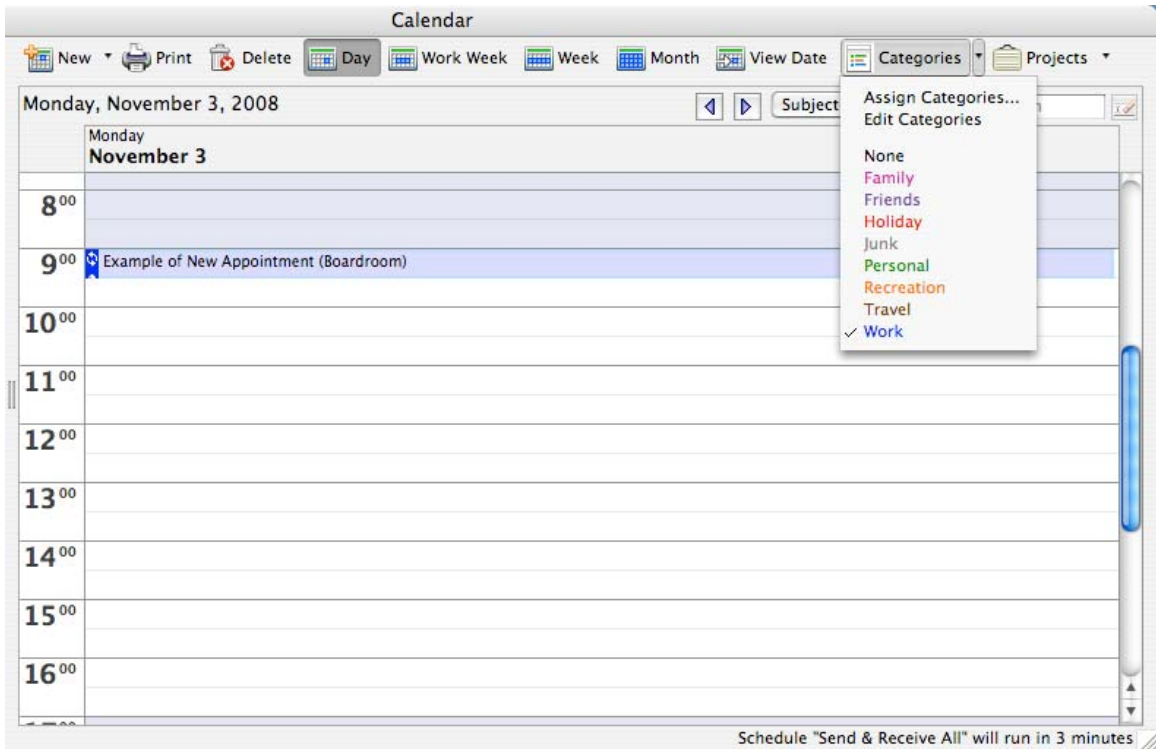
**Range of recurrence** options –End after 12 occurrences

- Click **OK**.
- Click **Save** and close.
- If prompted, click **Yes** to send an update to all attendees.

---

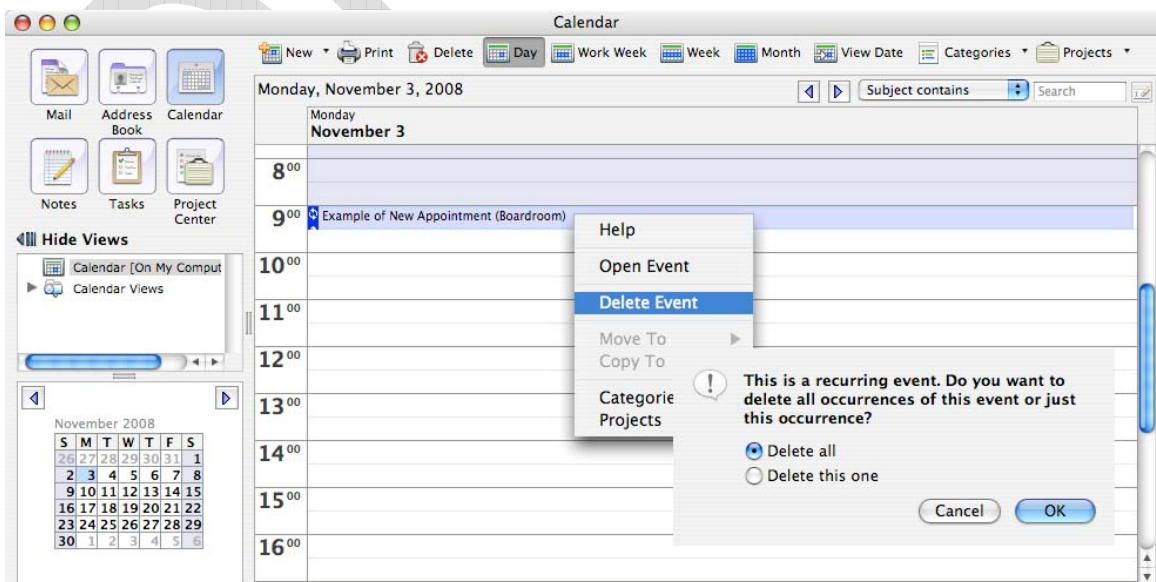
### Assigning a Category to an Appointment

- Click on the **Calendar** button in the Navigation Pane.
- Select 3 **Nov 2008** from the **Date Navigator**.
- Click the **Example of New Appointment**.
- Select the category using the **Categories** button in the toolbar:



## Deleting an Appointment

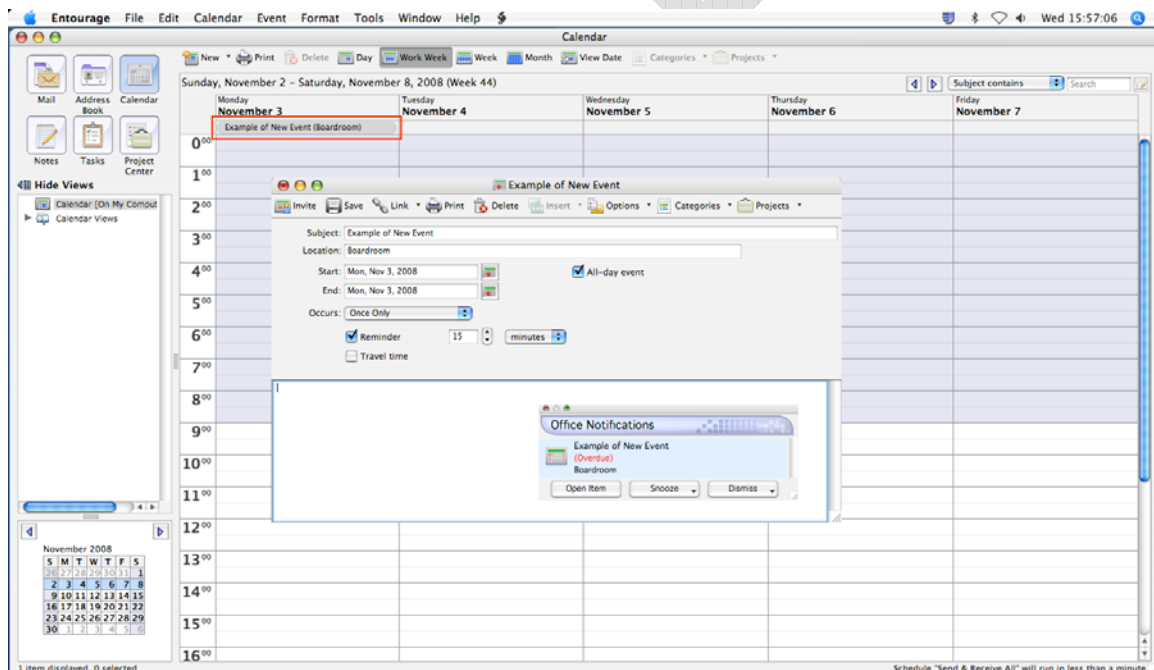
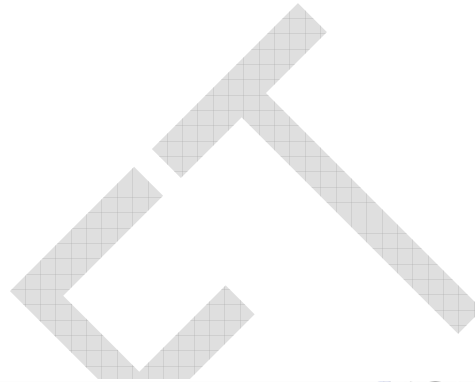
- Click on the **Calendar** button in the Navigation Pane.
- Select **3 Nov 2008** from the **Date Navigator**.
- Ctrl + click to open the **Calendar** popup menu, and select **Delete Event**.
- Select **Delete all** in the **Confirm Delete** dialog box and click **OK**.



## Events

- Open the **Calendar** view by clicking on the **Calendar** icon in the **Navigation Pane**.
- Click the **Day View** button.
- Use the arrows in the **Date Navigator** until **November 2008** is showing.
- Select **3 Nov 2008** from the **Date Navigator**.
- Click the **New** button in the toolbar.
- Enter the following information:

**All-day event** - Tick this box  
**Subject** - Example of New Event  
**Location** - Boardroom  
**Start date** – Leave as default  
**End date** – Leave as default  
**Reminder** – Leave as default  
**Occurs** – Leave as default



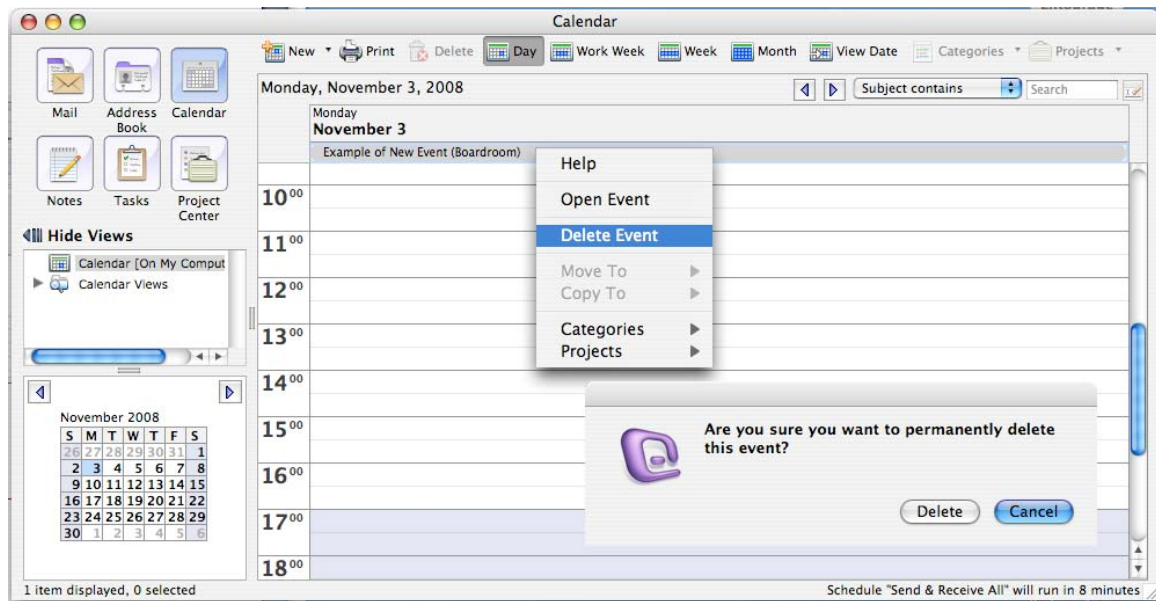
- Click **Save** and close window.

**Note:** Click on **Dismiss** if the **Reminder** dialog box is displayed.

---

## Removing an event

- Ctrl + click **Example of New Event** to open the **Calendar** popup menu, and select **Delete Event**.



- Select **Delete** in the **Confirm Delete** dialog box.

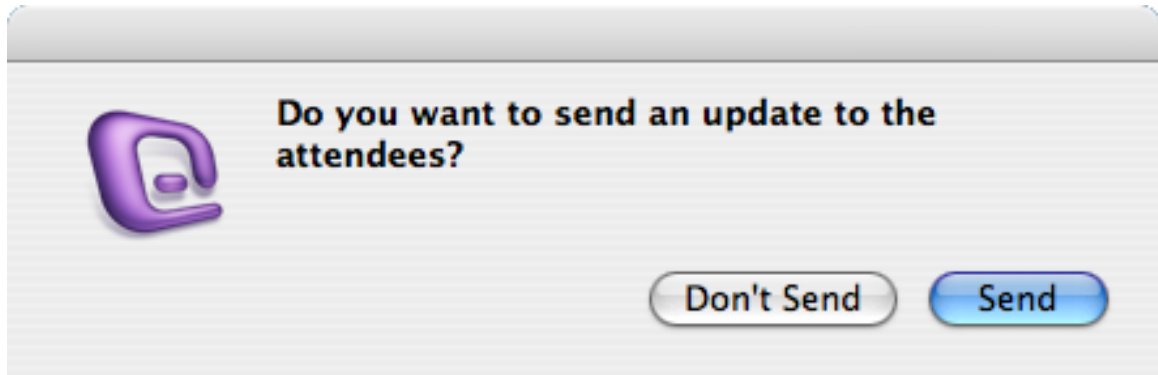
---

## Meetings

---

### Changing an Existing Meeting

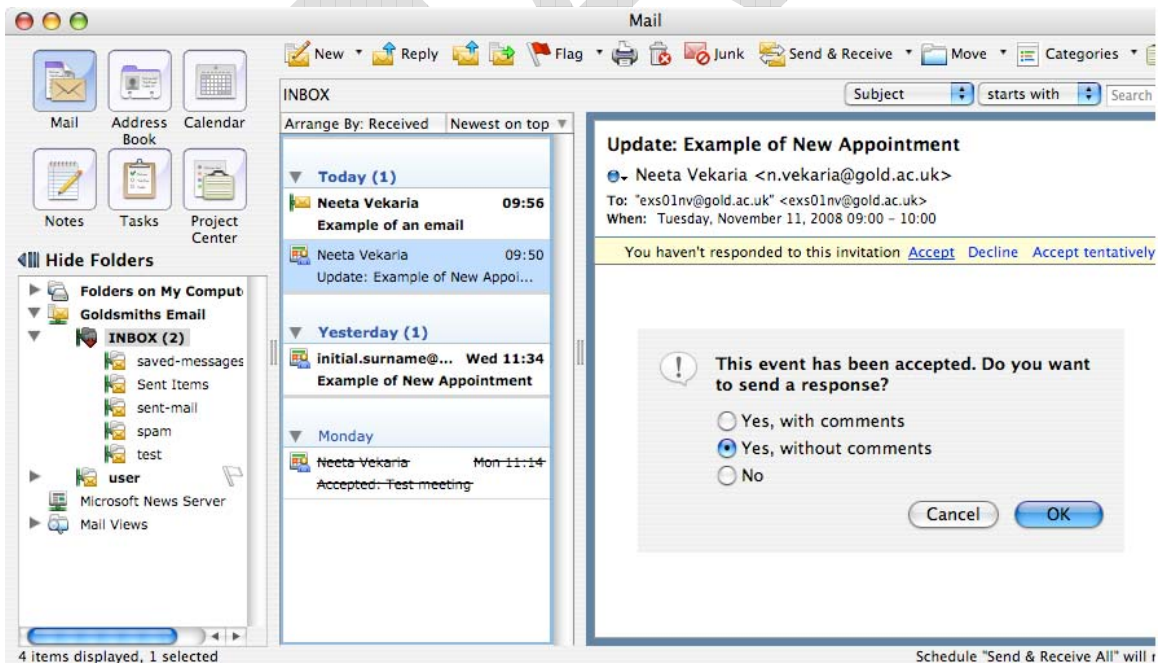
- Click on the **Calendar** button in the Navigation Pane.
- Select **3 Nov 2008** from the **Date Navigator**
- Double click on **Example of New Appointment** to open the appointment.
- Change the end time to **10:00** by clicking in the text box and keying in the numbers.
- Click **Save**.
- If prompted, click **Send** in the query dialog box asking if the updated meeting should be sent again to invited attendees:



- Close the window.

## Replying to a Meeting Request

- Select **Mail** in the **Navigation Pane**.
- A meeting request can be identified by this icon: 
- Select the meeting request to display it on the **Preview Pane**.
- Click on **Accept**.
- Select the option **Yes, without comments** followed by the **Ok** button.



-

- The meeting request will look something like this:

### **Update: Example of New Appointment**

• Neeta Vekaria <n.vekaria@gold.ac.uk>

To: "exs01nv@gold.ac.uk" <exs01nv@gold.ac.uk>

When: Tuesday, November 11, 2008 09:00 – 10:00

You have accepted this invitation. [Show Calendar Event](#)

---

### **Tracking Meeting Responses**

- Select **Mail** in the **Navigation Pane**.
- Select the meeting response to display it on the **Preview Pane**. It will look something like this:

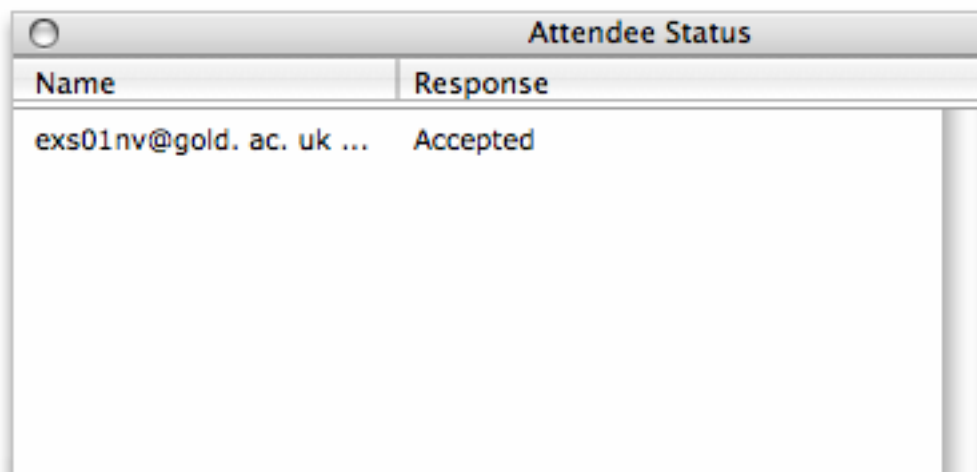
### **Accepted: Update: Example of New Appointment**

• Neeta Vekaria <exs01nv@gold.ac.uk>

To: n.vekaria@gold.ac.uk

When: Tuesday, November 11, 2008 09:00 – 10:00

Neeta Vekaria has accepted. [Show attendee status](#)



Attendee Status	
Name	Response
exs01nv@gold. ac. uk ...	Accepted

- Click on **Show Attendee Status** to view the responses received from attendees.

---

## Cancelling a Meeting

- Click on the **Calendar** button in the Navigation Pane.
- Select **3 Nov 2008** from the **Date Navigator**.
- Ctrl + click to open the **Calendar** popup menu, and select **Delete Event**.
- Select **Delete** in the **Confirm Delete** dialog box.

DRAFT