

Getting Started with Outlook with Calendar

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1 Introduction

At Goldsmiths College there are two alternative Microsoft Outlook packages that are deployed to end-users. These are:

1. The fully supported and recommended basic MS Outlook package. This package provides the normal functionality associated with an email client (such as sending, receiving and organising email messages and storing contacts) but does not support online calendar facilities.
2. An enhanced MS Outlook package known as “Oracle Connector for Outlook” (OCFO). This package uses the Oracle Connector add-in to supplement the basic Outlook functionality with online calendar facilities similar to those found in Corporate Time (Oracle Calendar), thus enabling college staff to schedule meetings and access colleagues’ online diaries.

The purpose of this document is to provide an overview of features and functionality in the enhanced Outlook package, and to highlight the principal differences between this and the basic package.

2 Outlook System Requirements

2.1 System Requirements

Outlook should run on most modern computers. However some older machines might become slow when running Outlook. These are the requirements to run Outlook as stated by Microsoft.

Component	Requirement
Computer processor	<ul style="list-style-type: none">• Intel Pentium 233-megahertz (MHz) or higher processor, Pentium III recommended.
Memory	<ul style="list-style-type: none">• 128 megabytes (MB) of RAM or above recommended.
Hard disk	<ul style="list-style-type: none">• 350 MB of available hard disk space (hard disk usage will vary depending on configuration; custom installation choices may require more or less hard disk space.).• Optional installation files cache (recommended) requires an additional 200 MB of available hard disk space.
Operating system	<ul style="list-style-type: none">• Microsoft Windows 2000 with Service Pack 3 (SP3) or later; or Windows XP or later.
Display	<ul style="list-style-type: none">• Super VGA (800 × 600) or a higher-resolution monitor.
Microsoft Outlook	<ul style="list-style-type: none">• Microsoft Outlook 2003 (with Service Pack 2)

2.2 Where is My Outlook Data Stored?

Outlook gives you access to data stored on a server. In our case this means email messages and calendar entries only. Outlook takes a copy of your messages, which are held on the College's email server. It then periodically synchronises what is on the server and what is on your 'local' computer (that is, the one you are currently working on). When you read a message it will be marked as read on the server on synchronisation. Deleting similarly takes effect when you synchronise.

All other Outlook data is saved on the computer on which you are working. This means that if you are working on another computer you will not have access to it. This applies to Notes and Journal only.

2.3 Overview of Outlook Facilities

Please note that we are not currently running an Exchange server so, if you have used Outlook before, there may be some advanced feature, which you cannot use. Please see *Overview of Outlook Functionality* on page 39 for further details.

2.4 Installing Outlook

To ease the introduction of Outlook within College we are deploying it on a department-by-department basis. If your department is now being offered the chance to use Outlook instead of Mulberry, the Applications Team will be in contact to arrange a mutually convenient date and time for it to be installed.

It should also be available to use on any Open Access PC if you have a staff username.

Administrator Rights to your PC are required for the installation. The easiest way to determine whether you have these rights is to right click the green Start button in the bottom left hand corner

of your screen. If the options 'Open All Users' and 'Explore All Users' is not listed, then you do not have these rights. Please contact the IT Services Helpdesk to submit a request for a Technician to provide you with these rights.

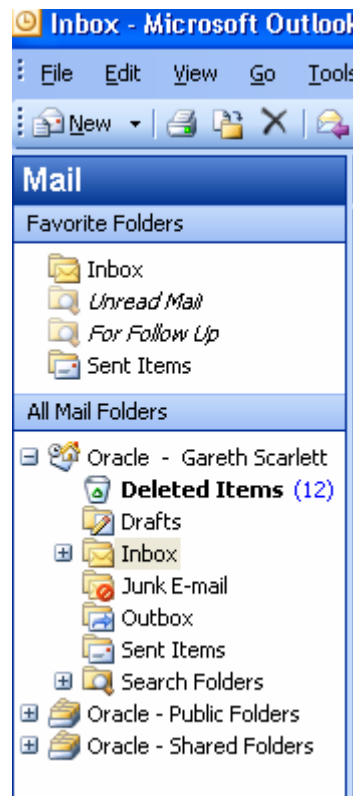
3 What's different with Oracle Connector

This chapter describes the differences between the basic MS Outlook package and the enhanced Outlook package that uses the Oracle Connector add-in.

3.1 Location of “Sent Items” and other folders

When MS Outlook is deployed with the Oracle Connector add-in, all e-mail folders (including “Sent Items”, “Deleted Items” and “Drafts”, as well as “Inbox”) are stored on the Goldsmiths e-mail server.

As a result, in the Navigation Pane in Outlook, you will see all these e-mail folders appearing in the same parent folder (see illustration below).



This is different from the behaviour of the basic Outlook package, whereby the “Inbox” is stored on the Goldsmiths e-mail server but other folders (including “Sent Items”, “Deleted Items” and “Drafts”) are – by default – stored in the user’s personal e-mail file on the workstation: hence with basic Outlook the “Inbox” – by default – appears in a different parent folder than the other e-mail folders.

Moreover when using the Oracle Connector add-in, it is no longer necessary to apply a “rule” on each workstation where Outlook is used, in order to force sent items to be stored on the server instead of the current workstation (this rule is described in section 2.3.8 “Centrally stored e-mail” in the document C431.doc).

3.2 Deletion of e-mail messages

When MS Outlook is deployed with Oracle Connector, the deletion of e-mail messages is handled differently than with the basic Outlook.

With the basic Outlook package, when an e-mail message is deleted it will remain in its containing folder – i.e. will not disappear – but will be represented with a line through it (as though it has been “crossed out”). In order to finally purge any “deleted” messages from the system, it is necessary to run the “Edit – Purge Deleted Messages” menu option.

With the Oracle Connector add-in, however, deleting an e-mail message causes it to disappear immediately from its containing folder, and to be moved to the “Deleted Items” folder. Deleting it then from the “Deleted Items” folder will cause it to be purged finally from the system.

3.3 Availability of the Calendar and other features

When using Oracle Connector rather than the basic Outlook, it is possible to use the Outlook Calendar feature in its entirety.

With the basic Outlook package, the Outlook Calendar and any appointments/meetings in your diary would only be stored locally on the workstation where you are currently working and hence would not be accessible from other workstations.

When using the Oracle Connector add-in, however, you can access your diary from any computer connected to the network and also over the web from outside the College using Oracle Calendar (formerly known as Corporate Time). This is because your diary information is stored on a Goldsmiths Calendar server rather than on disparate workstations.

As well as the Calendar, there are also limitations on the functionality of the Tasks feature when used with the basic Outlook package rather than with the Oracle Connector add-in.

Instructions on how to use these features are provided in the following chapters.

3.4 Known Issues with Calendaring in Outlook with Calendar

- **Designate functionality:** In some instances users are unable to edit and delete entries in designate diaries. There is no solution to this at present and users are advised to use the standalone Oracle Calendar desktop client for designate functionality.
- **Reoccurring appointments/meetings:** If there is a conflict when creating a reoccurring appointment/meeting, the entry is saved to your Outlook but not saved to the Oracle Calendar server. To create such appointments/meetings users are advised to use the Check Conflicts functionality in the standalone Oracle Calendar desktop client.
- **Departmental groups:** groups created by IT Services such as dept-drama or dept-pace are not available in Outlook with Calendar. You can either create your own distribution list, which you will be responsible for updating or you can use the standalone Oracle Calendar desktop client. For instructions on how to create a distribution list please see section [8.1.4](#).

4 Outlook Workspace

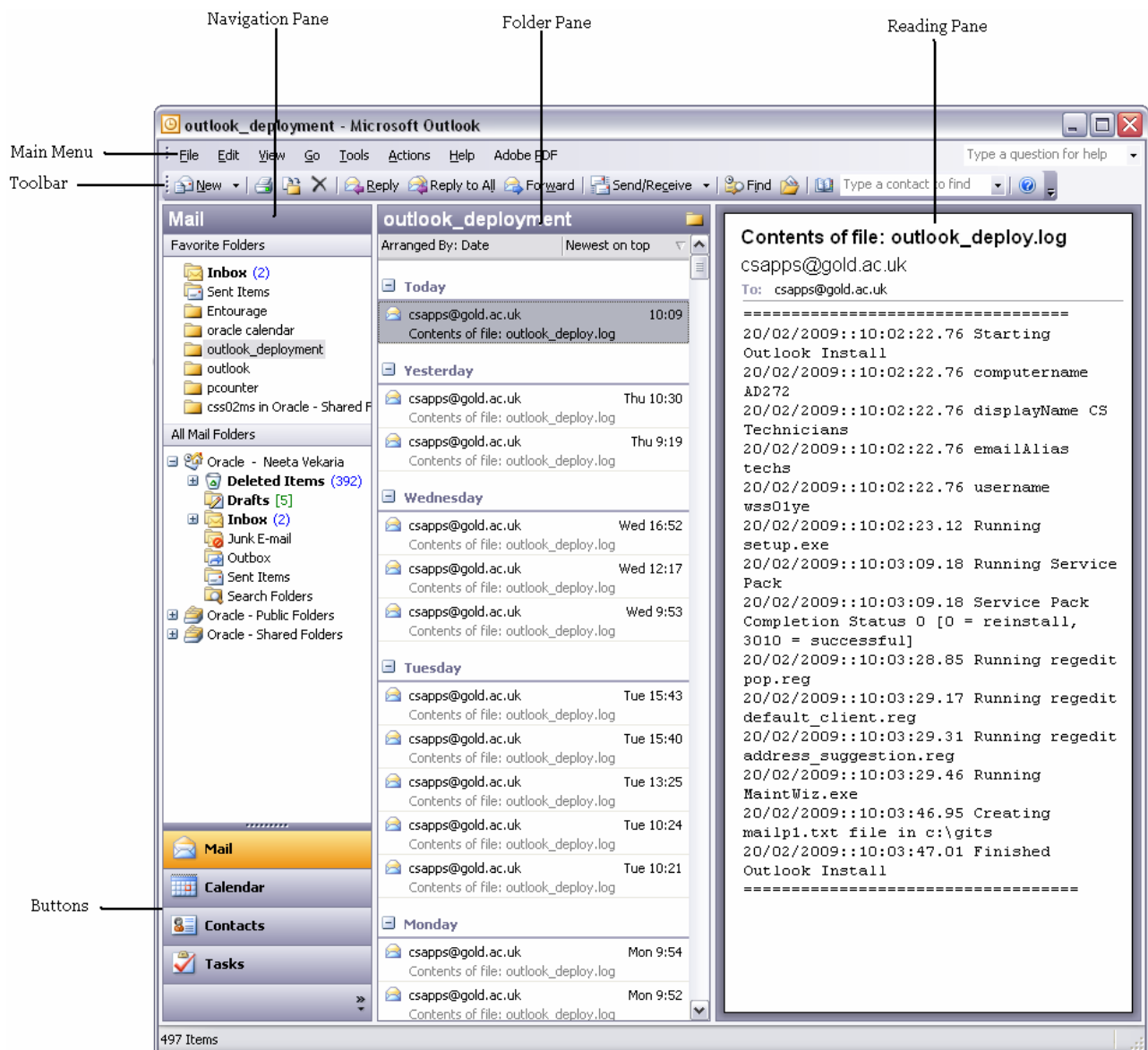
4.1 Exploring the Outlook 2003 Workspace

- Double-click the Microsoft Office Outlook 2003 icon to start – or select it from the Start menu.



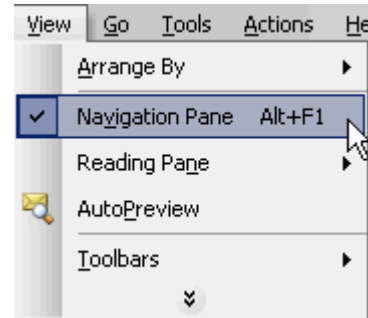
- When prompted enter your College username and password.

Below is the default Outlook layout:



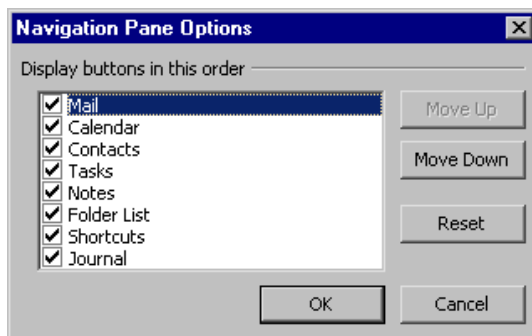
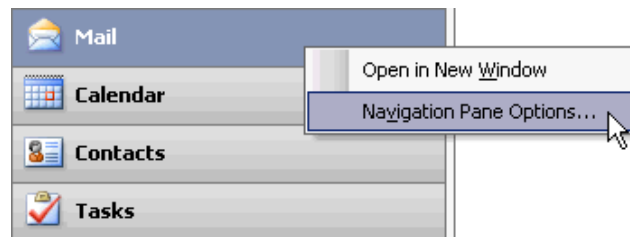
4.1.1 Arranging the Panes

- Change the layout of the panes: **View** ⇒ **Reading Pane** ⇒ **Right; Bottom; or Off**.
- If the Navigation Pane is not already open, from the main menu, choose **View** ⇒ **Navigation Pane**:



4.1.2 Navigation Pane

- **Right-click** on any of the 'buttons' in the Navigation Pane to display a pop-up menu.
- Select **Navigation Pane Options...**



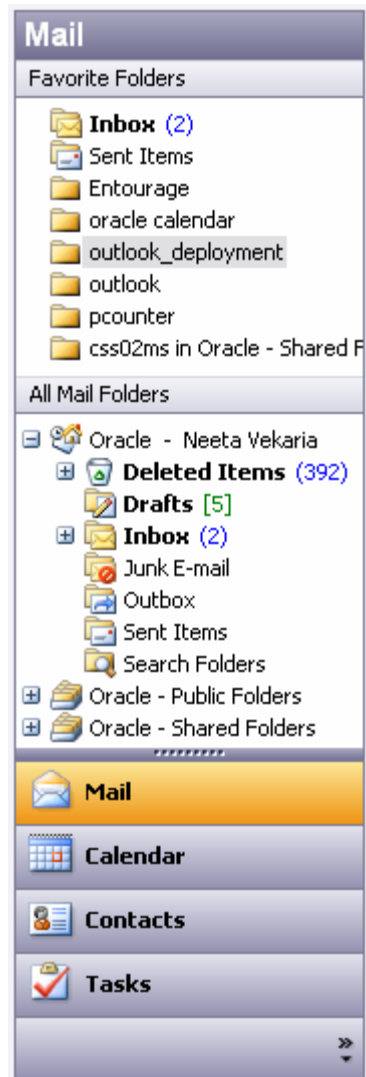
- Tick all the options to display all of the buttons in the Navigation Pane.
- Click **OK** to close the **Navigation Pane Options** dialog box.

Click on the **Mail** button.

Your mail folders are made visible in the Navigation Pane.

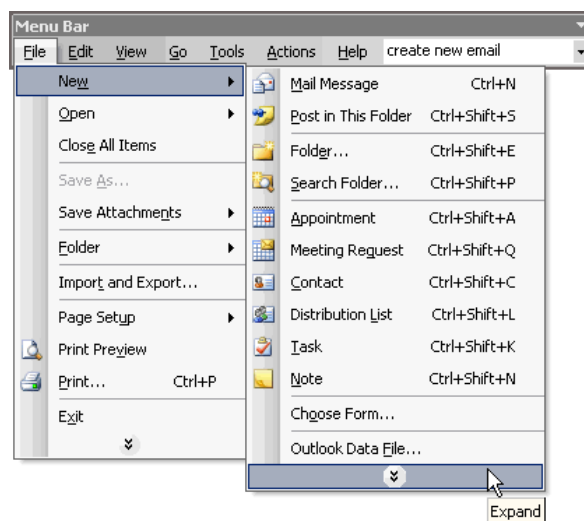
The toolbar will change appropriately too (see below)

Clicking the other options will display their corresponding content.



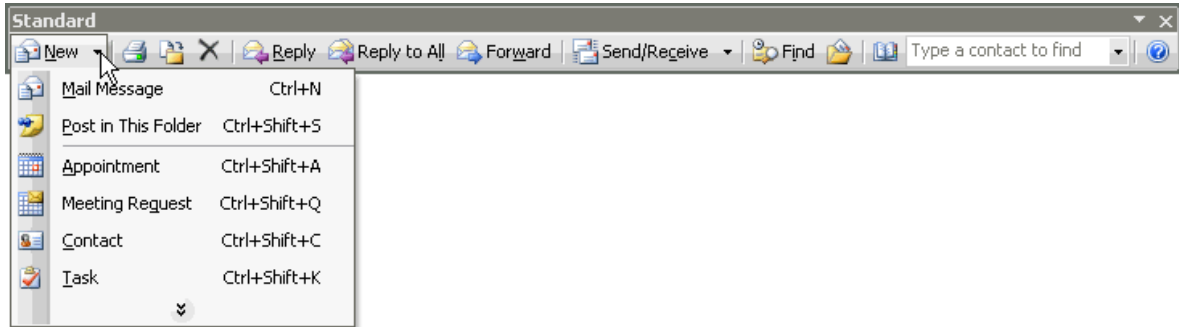
4.2 Main Menu

Explore the **Main Menu** by clicking on the various options, and expanding the menus. If you see down arrows at the bottom of the menu, click on them to fully expand the menu:



4.3 Toolbars

Experiment with the Standard Toolbar by clicking on the various menu options:



Select any option in the Navigation Pane and the toolbar changes accordingly. For instance, select Contacts in the Navigation Pane and notice how the toolbar changes:

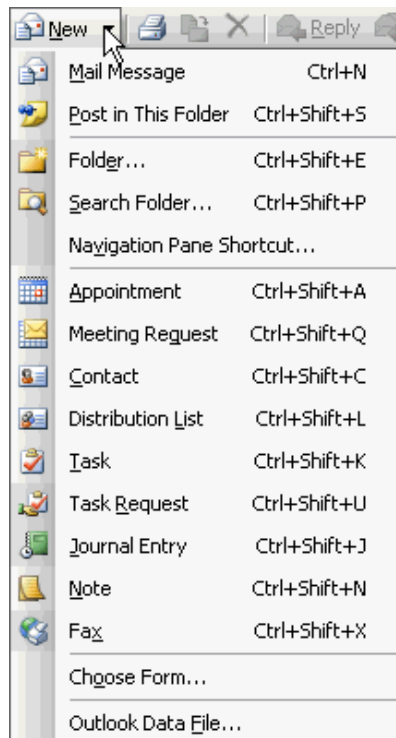


4.3.1 'New' Pull-down Menu

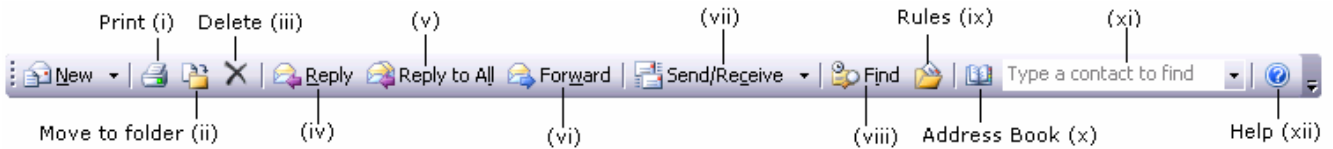



- The type of new object you are creating changes according to which object is selected in the Navigation Pane. For example, with **Mail** selected in the Navigation Pane, the **New** button will create a new mail message. With **Contacts** selected in the Navigation Pane, a new contact is created, and so on.

- Click on the down arrow beside the **New** button to expand the drop-down menu:



4.3.2 Standard Toolbar

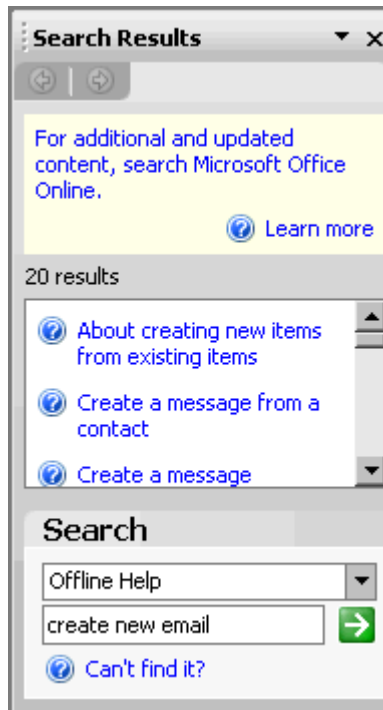
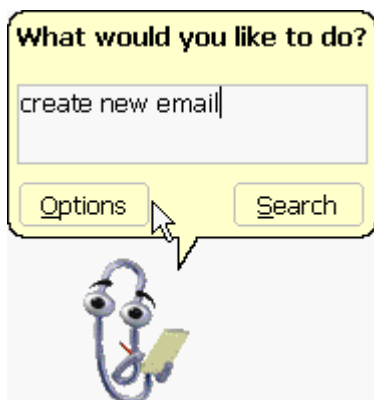


- 1) **Print:** the mail message that is selected will be printed on the default printer.
- 2) **Move to folder:** displays a list of folders to move mail message to. If the folder you wish to move message to is not displayed, select the  **Move to Folder...** **Ctrl+Shift+V** option. From the list displayed, select the folder you wish to move message to followed by the **OK** button.
- 3) **Delete:** marks the selected message for deletion, represented by a line through the message. This can be **Purged** at a later time.
- 4) **Reply:** displays the reply message window with the **To:** set to the sender's email address.
- 5) **Reply to all:** displays the reply message window with all recipients' email addresses set in the **To, Cc** or **Bcc** fields.
- 6) **Forward:** displays the content of the selected message in a new mail message window.
- 7) **Send/Receive:** to send or receive any email messages.
- 8) **Find:** searched for criteria entered in specified selected folders.
- 9) **Rules:** displays the **Create Rule** window, where you can define mail-filtering rules.
- 10) **Address book:** displays the Address Book window.
- 11) **Find a contact:** displays the contact information held for contact searched for.
- 12) **Help:** opens the **Outlook Help** task pane.

4.4 Getting Help

There are three ways you can search for help: the type a question box, the Help menu or the Office Assistant – it's up to you. The example below shows the Office Assistant:

- From the main menu, choose **Help** ⇒ **Show the Office Assistant**.
- Click on the Office Assistant to display the balloon in which you can type a question.
- Click **Search**.



- The help results will be displayed in the **Search Results** Task Pane.
- Click on a topic to read the Help content.
- Close it when finished.


5 Mail

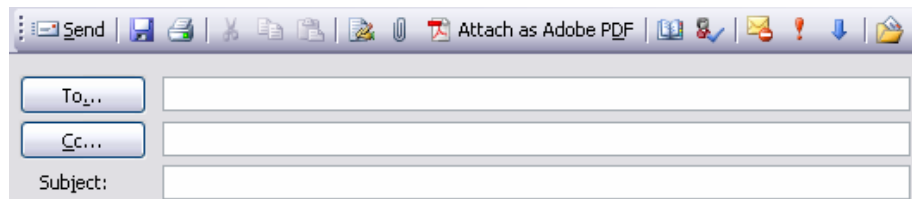
5.1 Creating Messages

5.1.1 Creating a Message

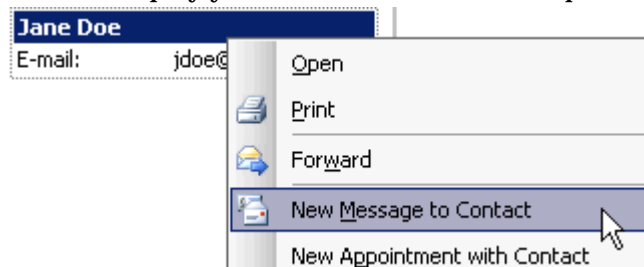
- Click on **Mail** in the Navigation Pane and then click the **New** button in the **Outlook** toolbar to open a new message window.
- **OR** from any part of Outlook click on the arrow beside the **New** button to open the full drop-down menu, and select **Mail Message**.

5.1.2 Selecting a Message Recipient

- Type an email address directly into the **To** field:
- To add another one separate using a semicolon.
- Click on the **Check Names** button  to look the name up in your address book.
- To include an address without the other recipients knowing select **View** ⇒ **Bcc Field**
- **OR** Click on **Contacts** in the Navigation Pane to display your contacts in the Folder pane.



- Right-click on a contact, and select **New Message to Contact** from the pop-up menu:

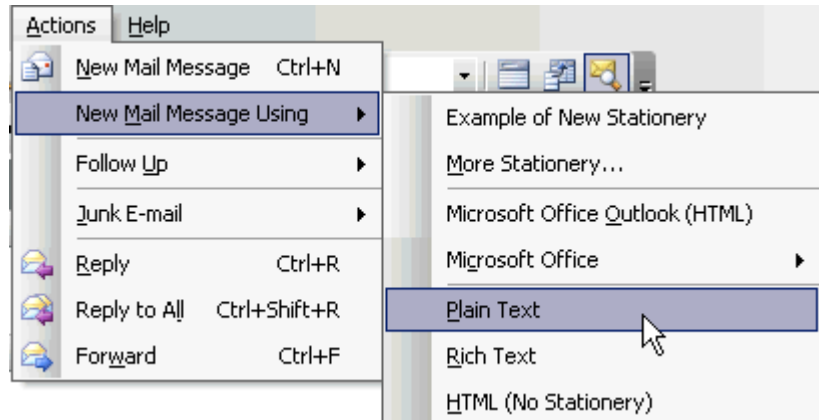


*Contacts are stored locally, so you cannot do this in Open Access teaching rooms. See **Contacts** below for further information.*

5.1.3 Modifying Message Formats

Sometimes you might want to change how your email text appears...

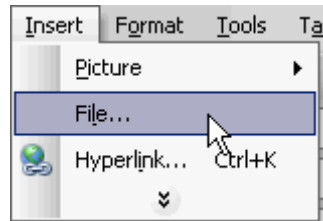
- From the main menu, choose **Actions** ⇒ **New Mail Message Using** ⇒ **select** from the list provided:



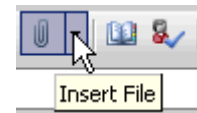
5.1.4 Attaching a File to a Message

- Create a new mail message.

- From the message's menu toolbar, choose **Insert** ⇒ **File**:



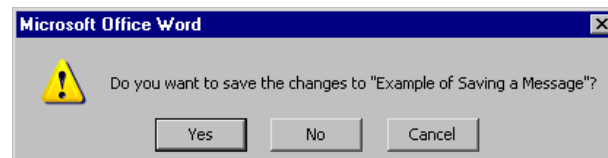
- **OR** click on the **Paperclip** icon within the message menu bar:



- In the **Insert File** dialog box, browse to and select the file.
- Click on **Insert**.

5.1.5 Saving Draft Messages

- Create a new mail message.
- Type **Example of Saving a Message** in the Subject field.
- Type **This is an example of how to save a message** in the body of the email.
- Click on the **X** icon in the top right hand corner of the message box to close the message. **Outlook** will respond with a query dialog box:



- Click on **Yes** to save a copy of the message to the **Drafts** folder.

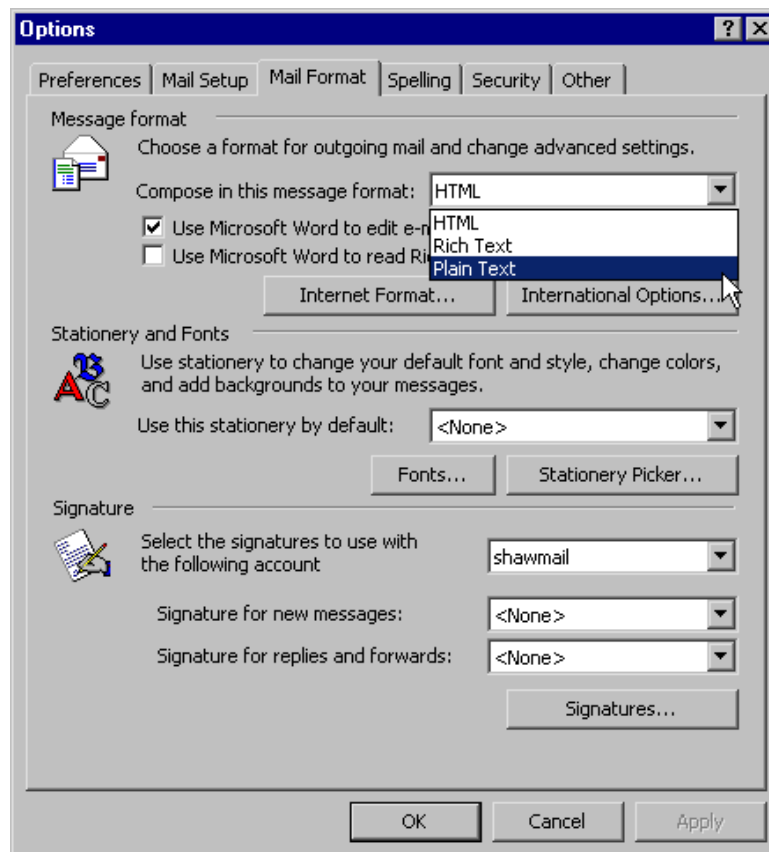
5.2 Setting Message Options

Here are some simple ways of personalising how Outlook works by default such as setting a font or adding a signature. These will only apply to messages created after the option has been set. All options are accessed from the menu: choose **Tools** ⇒ **Options**

5.2.1 Setting Message Formats

Instead of having to modify each message format individually, you can set a default one and only change it when you really need to.

- From the main menu, choose **Tools** ⇒ **Options** ⇒ click on the **Mail Format** tab:



- In the **Message format** section, choose **HTML** from the **Compose in this message format** drop down list.
- Click **OK** to close the dialog box or **Apply** to continue to the next section.

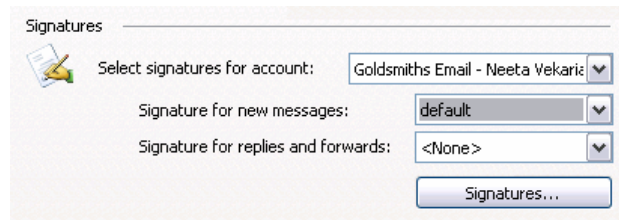
5.2.2 Adding a Signature to a Message

- 1) From the main menu, choose **Tools** ⇒ **Options** ⇒ click on the **Mail Format** tab.
- 2) Select the **Signatures** button at the bottom of the tab to open the **Create Signature** dialog box.
- 3) Click the **New** button to open the **Create New Signature** dialog box, and follow the steps to create a personal signature.
- 4) Enter *Default* in the Enter a name for your new signature field.
- 5) Click on **Next**.

- 6) In the next step, type the signature in the **Signature text** field. The signature should be in the following format, replace items in underlined italics with your own details:

Firstname Surname
Job title or Department of department
Goldsmiths, University of London
New Cross, London SE14 6NW
t: +44 (0)20 7XXX XXXX
e: e.mail@gold.ac.uk
www.goldsmiths.ac.uk

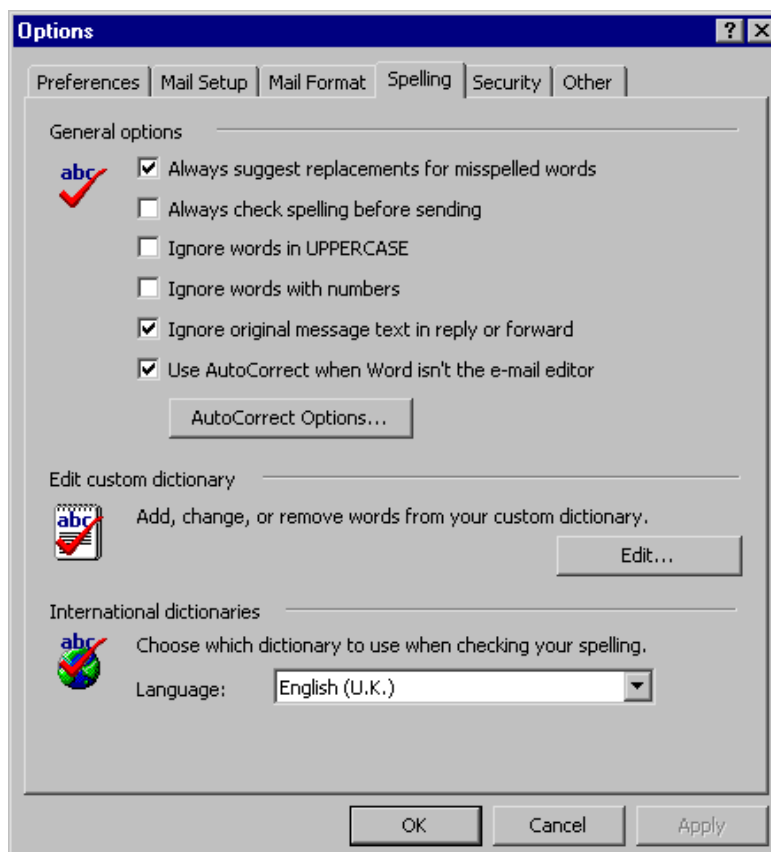
- 7) Click **Finish**, then **OK** to close the **Create Signature** dialog box.
8) Click on the down arrow for **Signature for new messages** option and select **Default**:



- 9) Do the same for Signature for replies and forwards.
10) Click **OK** to close the **Create Signature** dialog box.
11) Click **Apply** followed by the **OK** button to close **Options** dialog box.

5.2.3 Checking the Spelling and Grammar

- From the main menu, choose **Tools** ⇒ **Options** ⇒ Select the **Spelling** tab:

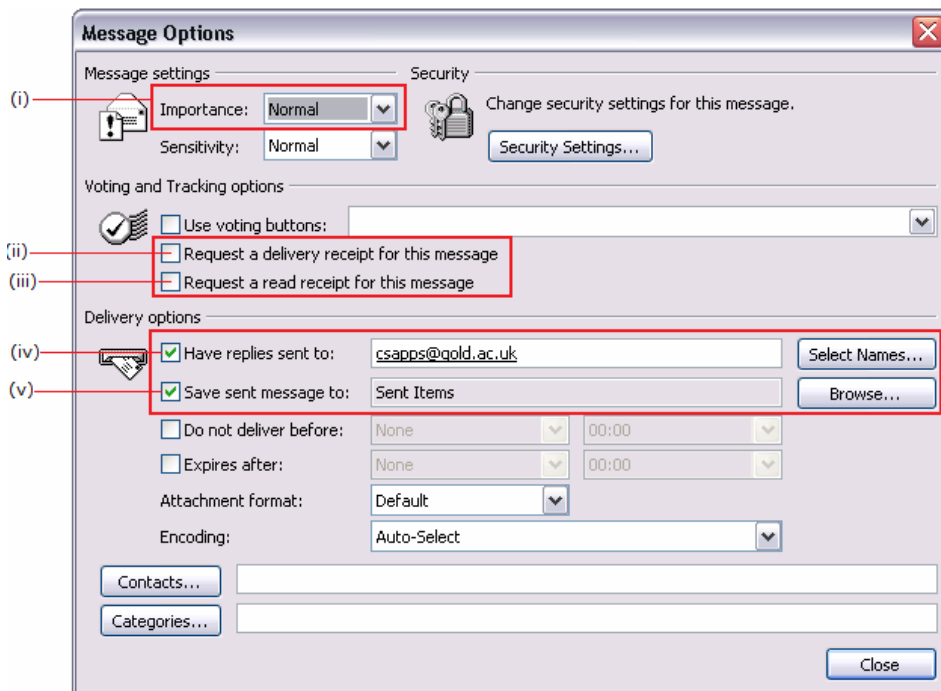


- Tick the Always check spelling before sending option.
- Click **OK** to close the dialog box.

5.2.4 Modifying Delivery Options

For some messages you may want to change the default delivery options...

- Create a new message. From **the message's** menu bar, choose **View** ⇒ **Options** to open the **Message Options** dialog box:



- i) **Importance:** select message importance from the **Importance** drop down menu.
- ii) **Delivery receipt:** tick this box to be notified when a message has been delivered
- iii) **Read receipt:** tick this box to be notified when a message has been read
- iv) **Have replies sent to:** tick this box and enter email address if you would like email reply to be sent to an email address other than your default. This is useful for shared or departmental email accounts. You can also choose a name from your **Contacts** by clicking the **Select Names...** button.
- v) **Save sent message to:** click the **Browse...** button to select a mailbox to save the email to if not the default **Sent Items**.
- vi) Click on **Close** to set the delivery options.

5.3 Opening and Replying to a Message

5.3.1 Opening and Reading a Message

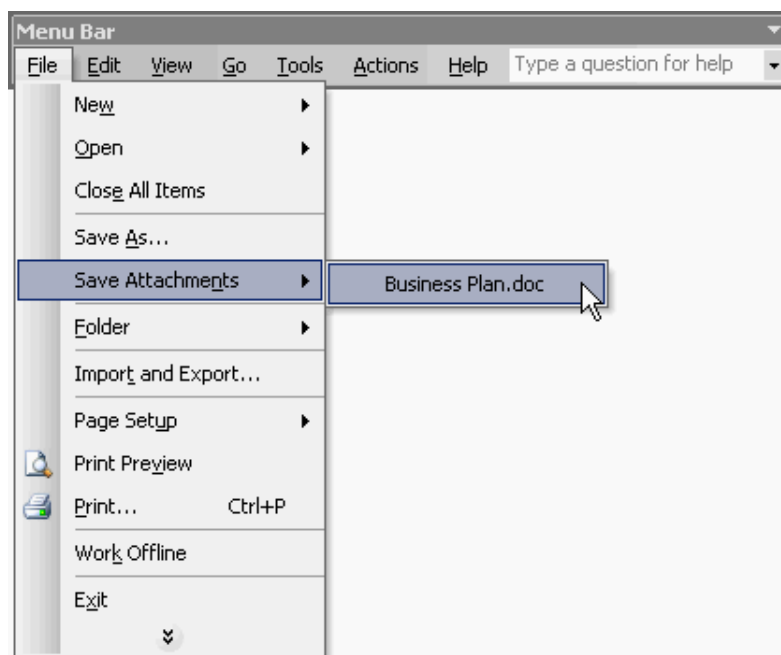
- Select **Mail** in the Navigation Pane.
- There are two ways to open a message:
 - Double-click on the header line of a mail message in the **Folder** pane, and the message box will open in a **new window**.
 - **OR** single-click to select and read the message in the **Reading** pane.

5.3.2 Opening an Attachment

- Select **Mail** in the Navigation Pane.
- Select a message from the Folder Pane that has an attachment, shown by a paperclip @.
- Open the attachment by double-clicking on the name of the attachment in the **Reading** pane.
- Click on **Open** in the **Opening Mail Attachment** dialog box.

5.3.3 Saving an Attachment

- Select a message in the **Folder Pane** that has an attachment.
- From the main menu, choose **File** ⇒ **Save Attachments**.
- Select the specific attachment you would like to save:



- In the **Save Attachment** dialog box, locate the folder you wish to save to using the **Save In** drop-down menu.
- Click on **Save** to save the attachment.

5.3.4 Replying to a Message

- Open a message.
- Click on the **Reply** button in the toolbar.



- This will open a reply message, with the sender from the original message in the **To** field. Close the mail message without saving.
- Close the original mail message.


5.3.5 Forwarding a Message

- Open a message and click on the **Forward** button in the toolbar.
- This will create a new message, with the original email contained in the body text. Close the mail message without saving.
- Close the original message.

5.3.6 Marking Messages Unread


- Select a mail message that has been read. You can tell because it is not emboldened.
- From the main menu, choose **Edit** ⇒ **Mark as Unread**.
- **OR** right-click read message and select **Mark as Unread**.
- **OR** press the **CTRL + U** key combination.
- Notice that the mail message is now **emboldened** in the Folder Pane.

5.3.7 Deleting a Message

- 1) Select **Mail** from the Navigation Pane.
- 2) Select a message to delete.
- 3) Click on the **Delete** icon  and the message will disappear immediately from its containing folder, and to be moved to the **Deleted Items** folder.
- 4) Deleting it then from the **Deleted Items** folder will cause it to be purged finally from the system.

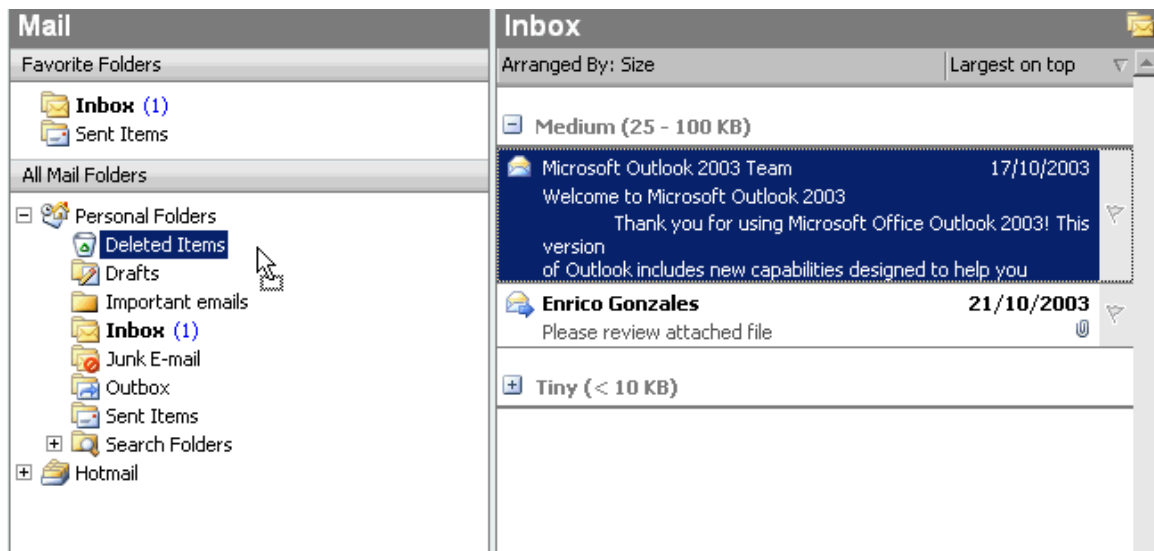
5.4 Managing Messages


5.4.1 Sorting Messages

- Click on the **Mail** button in the Navigation Pane.
- Select the **Inbox** folder.
- From the main menu, choose **View** ⇒ **Arrange By** and select **Date**.
- **OR** click the relevant column header in the Folder Pane. The current “arrange by” option is indicated by a triangle: downward-facing for sort by column in descending, and upward facing for sort by column in ascending order .
- Experiment by selecting various options.

5.4.2 Moving Messages between Folders

- Select a mail message from the **Inbox**. And drag it from the **Folder Pane** over top of the folder you want to move it to:



- Release the mouse button.
- **OR** click the move to button  in the toolbar, and select the folder you want to move it to.

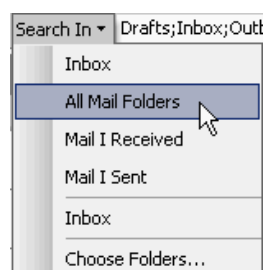
5.4.3 Searching for Messages

- Click on the **Find** icon in the **Standard** toolbar to open the **Find** feature above the Folder Pane viewing area:

- Enter search criteria in the **Look for** box.



- By default the currently selected folder will be searched. To change this click on **Search In** and select **All Mail Folders** from the drop down menu:

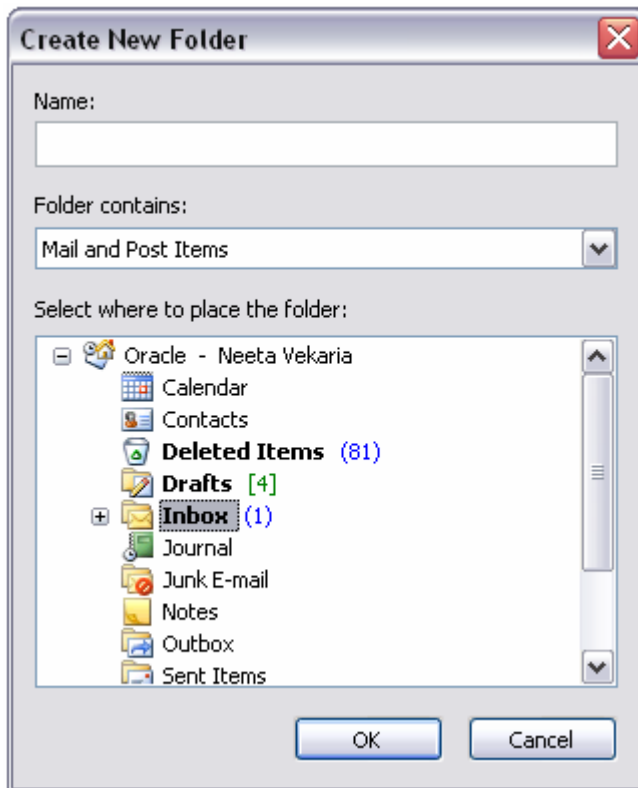


- Click on **Find Now**.
- All mail messages in all folders that contain the search criteria will be displayed in the Folder pane.
- Close the Find feature by clicking on the cross to remove the filter.

5.5 Folder Management

5.5.1 Creating a New Folder

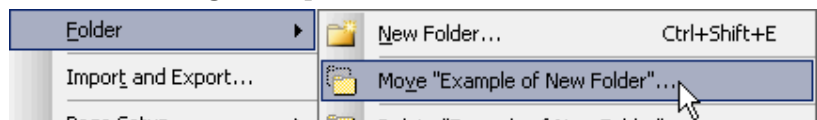
- From the main menu, choose **File** ⇒ **Folder** ⇒ **New Folder** or **right-click** ⇒ **New Folder**.



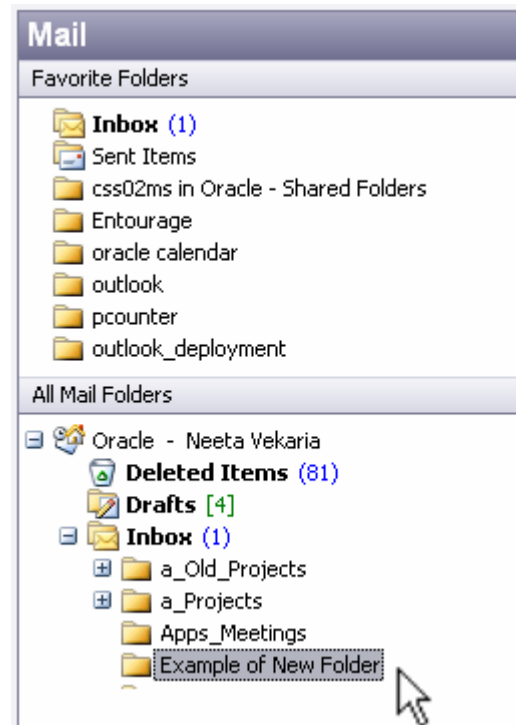
- Type the folder name in the **Name** field.
- In the **Folder contains** drop-down menu, choose **Mail and Post Items**.
- In the **Select where to place the folder** area, select **Inbox** under **Oracle** - <**First name Last name**>.
- Click **OK**.
- The new folder will be visible from the **Folders List**.

5.5.2 Moving Folders

- In the **Folders List**, select the folder to move (eg Example of New Folder).
- From the main menu, choose **File** ⇒ **Folder** ⇒ **Move** "Example of New Folder":



- This will open the **Move Folder** dialog box.
- Select **Inbox** from the list.
- Click **OK**.
- The folder will now be visible in its new position in the **Folders List**:



5.5.3 Deleting a Folder

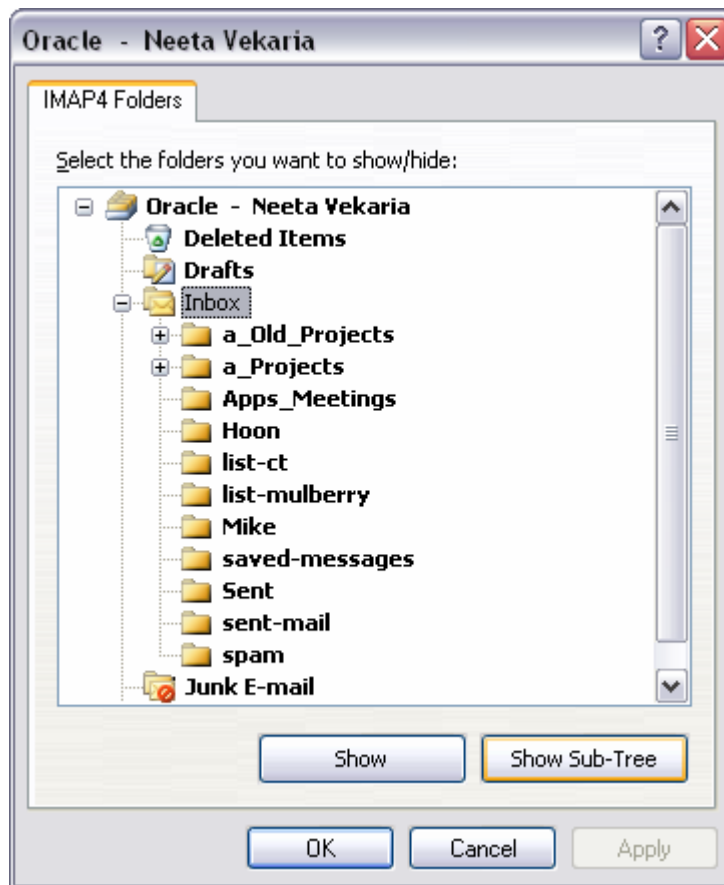
- In the **Folders List**, select the Example of New Folder.
- Right-click on the selected folder and select **Delete “Example of New Folder”**.
- Click on **Yes** in the **Microsoft Office Outlook** dialog box to confirm the deletion.

5.5.4 Shared Mailboxes

You can view the messages in mailboxes, which others have shared with you. This can be useful for departmental email accounts or if someone is going on leave and need someone to monitor their email.

At present some shared mailboxes do not appear automatically. To work around this issue:

- From the main menu, choose **Tools** ⇒ **IMAP4 Folders** ⇒ **Subscribe/Unsubscribe**.
- In the window shown below select the **Inbox** folder and click the **Show Sub-Tree** button.
- Then click the **OK** button.



- From the main menu, choose **Tools** ⇒ **IMAP4 Folders** ⇒ **Show All Folders**.

Sharing mailboxes

You cannot share your mailboxes from within Outlook yourself. To allow a person access to a mailbox owned by you, please email sysadmin@gold.ac.uk with your username, the name of the mailbox(es) you would like to share, and the username(s) of the person(s) with whom you would like them to be shared.

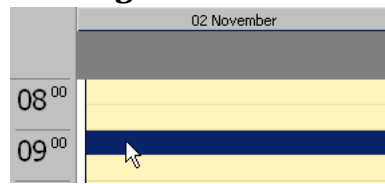
6 The Calendar: Appointments, Meetings and Events

This chapter provides instructions in how to use the Calendar functionality in MS Outlook. This is functionality which is supported when you are using the Oracle Connector add-in with Outlook, but not with the basic version of Outlook.

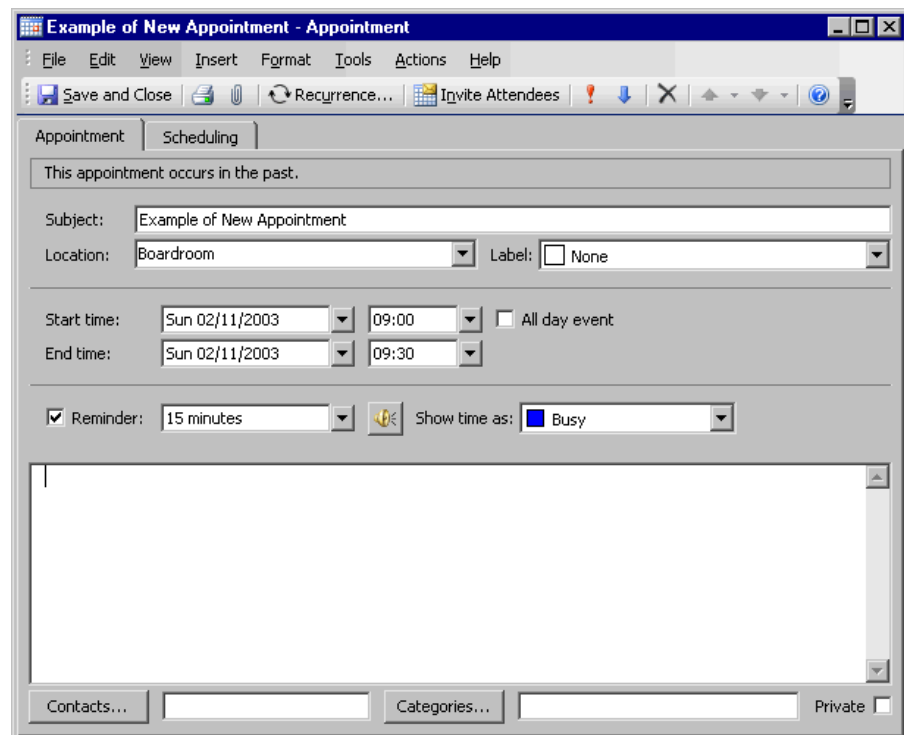
6.1 Appointments and Meetings

6.1.1 Adding an Appointment to the Calendar

- Open the **Calendar** view by clicking on the **Calendar** icon in the **Navigation Pane**.
- Use the arrows in the **Date Navigator** to move to the next month.
- Select **1 month forward from today** from the **Date Navigator**.
- Click on the **9:00** time slot:
- Right-click to open the **Calendar** popup menu, and select **New Appointment**.



- Enter the following information:
 - **Subject** - Example of New Appointment
 - **Location** - Boardroom
 - **Show time as, Start time, End time and Reminder** – Leave as default



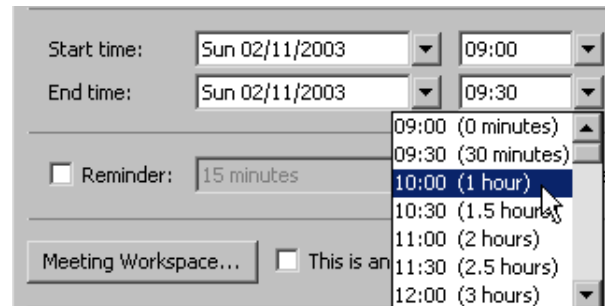
- Click **Save and Close**
Note: Click on **Dismiss All** if the **Reminder** dialog box is displayed. Click **Yes** to confirm the dismissal.

6.1.2 Editing an Appointment

- Right-click on **Example of New Appointment** and select **Open** from the drop down menu.

Change the Time

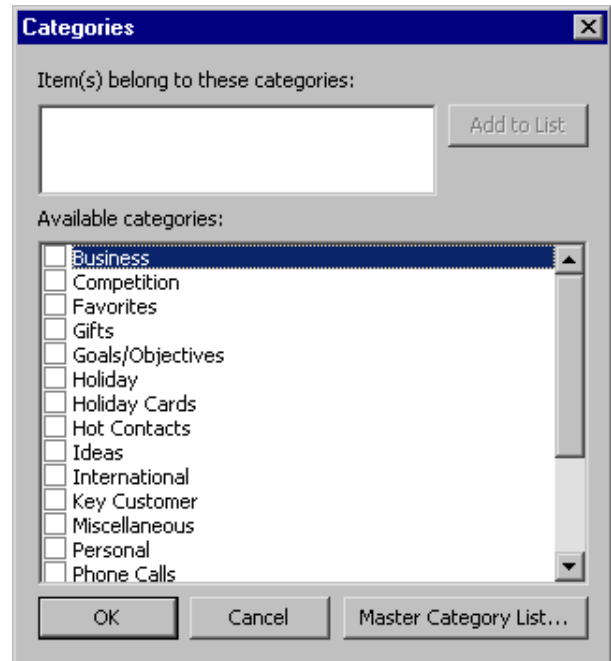
- Change the end time to **10:00**:



The screenshot shows a dialog box for editing an appointment. The 'Start time' is set to 'Sun 02/11/2003' at '09:00'. The 'End time' is also set to 'Sun 02/11/2003' at '09:30'. A dropdown menu is open for the end time, showing options from '09:00 (0 minutes)' to '12:00 (3 hours)'. The option '10:00 (1 hour)' is highlighted. Below the time fields, there is a checkbox for 'Reminder' set to '15 minutes' and a checkbox for 'This is an' (partially visible). A 'Meeting Workspace...' button is also present.

Assign a Category

- Select the **Categories** button at the bottom of an Appointment information box to open the **Categories** dialog box.
- You can have more than one: tick **Business** and **Key Customer**.
- Click **OK**.



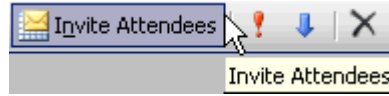
The screenshot shows the 'Categories' dialog box. It has a title bar with 'Categories' and a close button. The main area is titled 'Item(s) belong to these categories:' and contains an empty text box with an 'Add to List' button. Below this is a section titled 'Available categories:' with a list of categories, each with a checkbox. The 'Business' category is selected. The list includes: Business, Competition, Favorites, Gifts, Goals/Objectives, Holiday, Holiday Cards, Hot Contacts, Ideas, International, Key Customer, Miscellaneous, Personal, and Phone Calls. At the bottom, there are 'OK', 'Cancel', and 'Master Category List...' buttons.

- Click **Save and Close**.

6.1.3 Inviting Attendees

Adding attendees to an appointment turns it into a **meeting** in Outlook parlance.

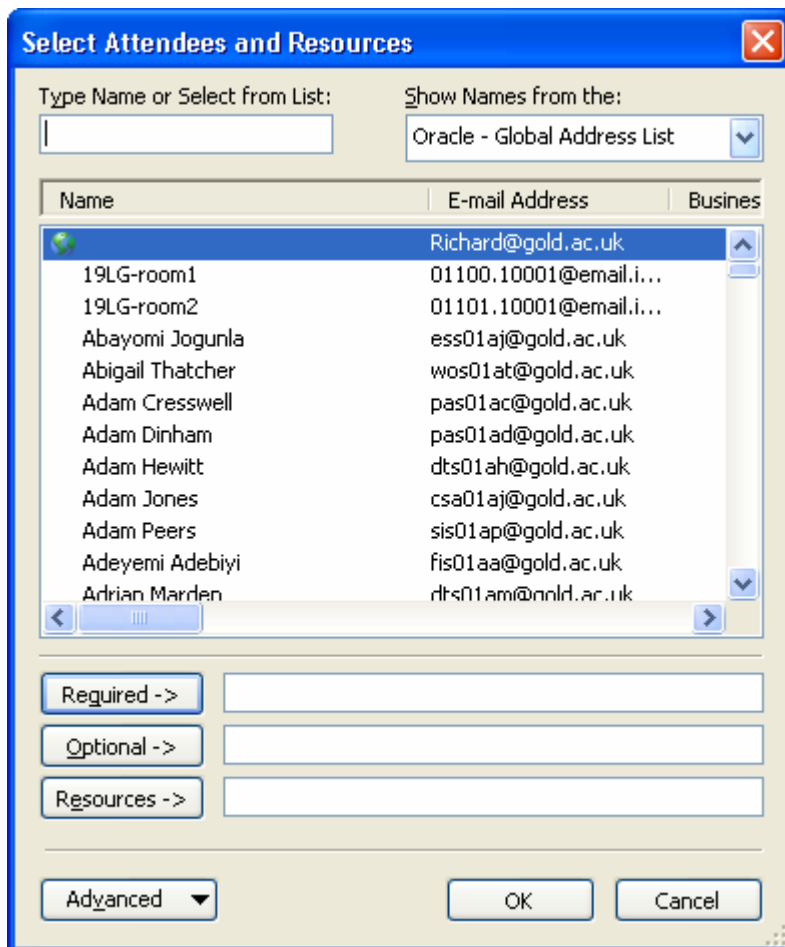
- Right-click on **Example of New Appointment** and select **Open** from the drop down menu.
- From the toolbar, click the **Invite Attendees** button. This adds the To field to the email.



- Click on the **To** button. This brings up the **Select Attendees and Resources** dialog.

Please note: when sending a meeting invitation to a member of College, it is important that you send it to their “core” email address (e.g. css01gs@gold.ac.uk) rather than to their email alias (e.g. g.scarlett@gold.ac.uk): otherwise the meeting details – when the invitation is accepted – will not be stored in the invitee’s Oracle Calendar diary on the Goldsmiths Calendar server, and so will not be available for other College members to view.

Using the “Select Attendees and Resources” dialog to retrieve an invitee’s name from “Oracle – Global Address List” (see below for details) will ensure that the invitation is sent to their core email address and not to their email alias.



- To add people from your address book click on the drop-down list labelled **Show Names from the:**
 - Select **Contacts**
 - Double-click on the contact from the **Name** list in the middle to place it in the list at the bottom.
- If you want to add people from the College, select **Oracle – Global Address List** from the drop-down list labelled **Show Names from the:**
 - Click on the button at the bottom of the dialog box **Advanced ⇒ Find... ⇒** and enter the surname etc. This will find all the people matching your search terms and will place their email addresses in the middle pane.
 - Double-click to add to the list as above.

- When you click OK the names will be added to the **To** field.
- Click **Send** if you want the recipients to be invited by email to the meeting.

Please note that this will only send an email to the person(s) invited. It is not a dynamic invitation. If you make changes, you will need to send the invitation again. You will be prompted to do this.

If you want to create a meeting from the outset rather than converting an existing appointment, then choose **File** ⇒ **New** ⇒ **Meeting Request** to open a new **Meeting** form.

6.1.4 Setting Recurring Appointments and Meetings

- Right-click on **Example of New Appointment** and select **Open** from the drop down menu.
- In the appointment toolbar, click on the **Recurrence** button
- Enter the following information

The screenshot shows the 'Appointment Recurrence' dialog box. It is divided into three main sections. The first section, 'Appointment time', contains three dropdown menus: 'Start' set to '09:30', 'End' set to '10:00', and 'Duration' set to '30 minutes'. The second section, 'Recurrence pattern', has four radio buttons for 'Daily', 'Weekly', 'Monthly', and 'Yearly', with 'Weekly' selected. To the right, it says 'Recur every 1 week(s) on:' followed by checkboxes for 'Sunday', 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday' (checked), and 'Saturday'. The third section, 'Range of recurrence', has a 'Start' dropdown set to 'Fri 31/10/2003' and three radio buttons: 'No end date' (selected), 'End after: 10 occurrences', and 'End by: Fri 02/01/2004'. At the bottom are three buttons: 'OK', 'Cancel', and 'Remove Recurrence'.

- **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.

Note that if you edit a recurring appointment you will be asked if you want to edit just that item or the whole series.

6.1.5 Deleting an Appointment

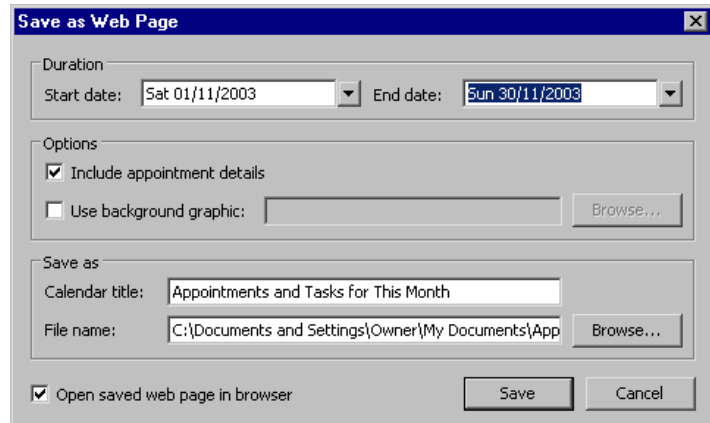
- Right-click on **Example of New Appointment** and select **Delete** from the drop down menu.
- Select **Delete the series** in the **Confirm Delete** dialog box and click **OK**.
- Choose whether to send a confirmation or not.

6.1.6 Saving a Calendar as a Web Page

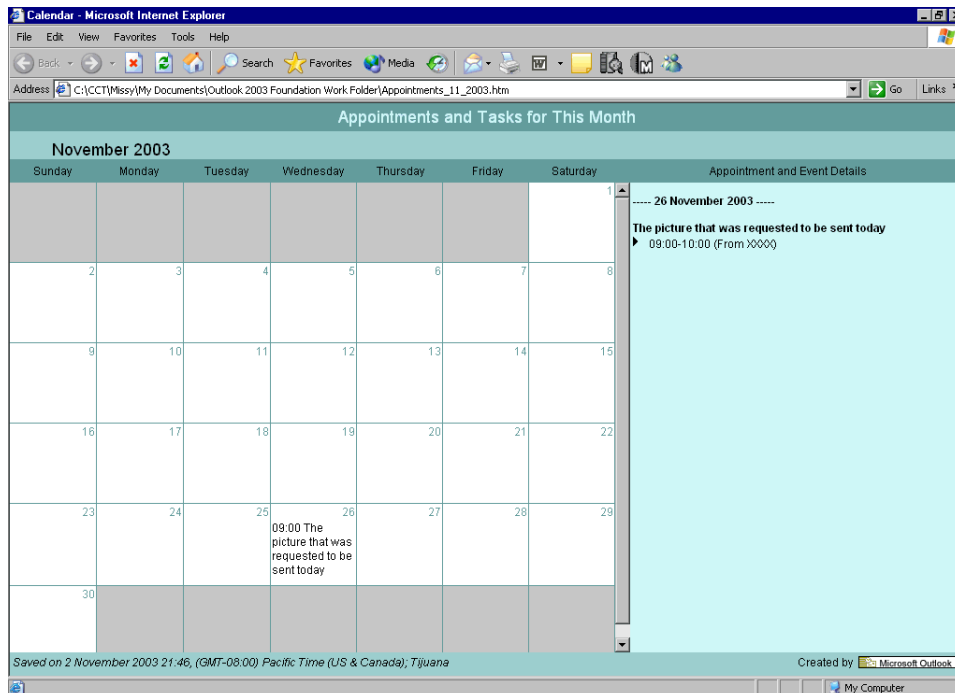
You can save a calendar as a Web page and then share it with others. This is a snapshot and will not update as your calendar changes.

- From the **Navigation Pane**, select the **Calendar** button to show the **Calendar view**.
- From the main menu, choose **File** ⇒ **Save as Web Page** to open the **Save as Web Page** dialog box.
- Enter the following settings into the **Save as Web Page** dialog box:

- Start Date – **start of next month**
- End Date – **end of next month**
- Include appointment details – **Ticked**
- Calendar title - **Appointments and Tasks for This Month**
- Open saved web page in browser - **Ticked**
- Press the Browse button and navigate to the **Desktop**.



- Enter **mm-yyyy.htm** into the name field (where mm = number of the month and yyyy = the year in full) and press the **Select** button.
- Click the **Save** button to generate the **Calendar** (it might take a few minutes, so be patient):



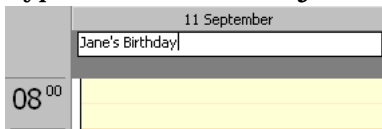
Close the browser and then delete this file from the desktop.

6.2 Events

An event is an activity that lasts 24 hours or longer. Usually, an event occurs once and can last for one day or several days, but an annual event, such as a birthday or anniversary, occurs yearly on a specific date. Events and annual events do not occupy blocks of time in your calendar; instead, they appear in banners. An all-day appointment displays time as busy when viewed by others, while an event or annual event displays time as free.

6.2.1 Scheduling an Event

- Open the **Calendar** view in the main viewing area.
- Select **a day 1 month ahead** from the **Date Navigator**
- Click on the grey area at the top of the **Appointment** area, under the current date header.
- Type ***Jane's Birthday***:



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

6.2.2 Removing an event

- Select the **Jane's Birthday** event.
- Click the **Delete** button in the **Standard** toolbar or right-click and select **Delete**.

7 Tasks

This chapter provides instructions in how to use the Tasks functionality in MS Outlook. This is functionality which is supported when you are using the Oracle Connector add-in with Outlook, but not with the basic version of Outlook.

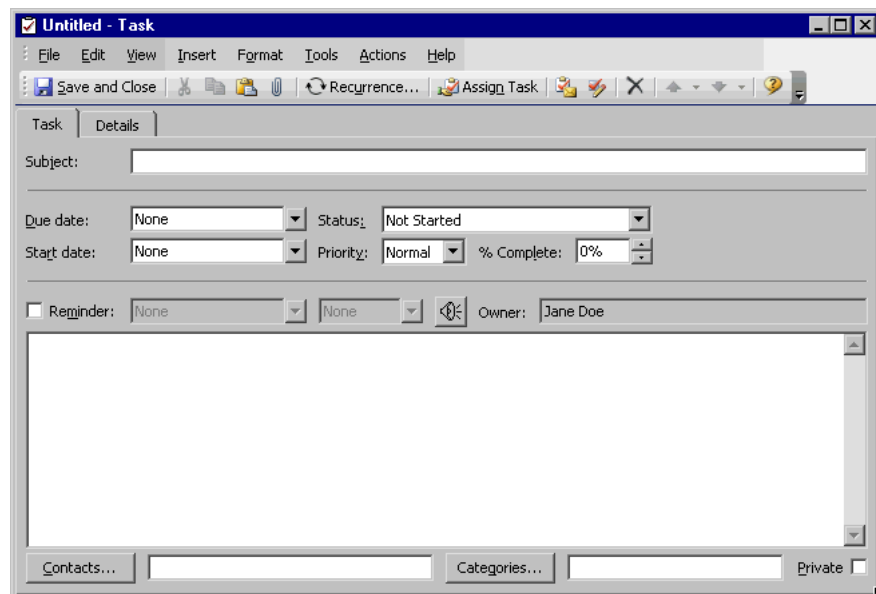
A task is a personal or work-related errand you want to track through completion. Note a task can only occur once: it is not possible in to create recurring tasks in Outlook with Oracle Connector.

7.1 Task Management

7.1.1 Adding a Task

- From the main menu, choose **File** ⇒ **New** ⇒ **Task** to open a new **Task** form:
- Enter the following information into the Task dialog box:

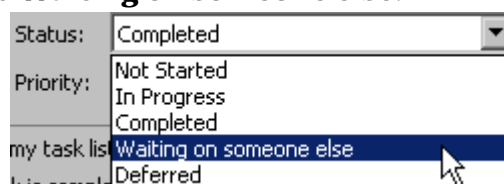
- **Subject** – Example of New Task
- **Due Date** – Next Wednesday
- **Start Date** – Next Monday
- **Status** – Not started
- **Priority** - Set the priority of the task, to **Low**.
- **% Complete** – Set the % complete to **25%**:
 - Note: this changes the status to “In Progress



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

7.1.2 Update a Task

- Click on the Tasks button in the Navigation Pane.
- Click on the **Simple List** button in the Navigation Pane.
- Double-click on the **Example of New Task**.
- Update the **Status** field to **Waiting on someone else**:



- Click **Save and Close**.

7.1.3 Filtering tasks

You can filter the tasks you see by selecting in the Current View of the Navigation Pane.

8 Contacts

8.1 The Contact List

8.1.1 Adding a Contact

- From the main menu, choose **File** ⇒ **New** ⇒ **Contact** to open a new **Contact** information box
- **OR** press the **Ctrl + Shift + C** key combination.

The screenshot shows a contact information dialog box titled "Jane Doe - Contact". It features a menu bar with options: File, Edit, View, Insert, Format, Tools, Actions, and Help. Below the menu bar is a toolbar with icons for "Save and Close", Print, Copy, Paste, Undo, Redo, and other actions. The dialog is divided into tabs: General, Details, Activities, Certificates, and All Fields. The "General" tab is selected, displaying the following fields:

- Full Name...: Jane Doe
- Job title: Administration
- Company: XXXX
- File as: Doe, Jane
- E-mail...: janedoe@XXXX.com
- Display as: Jane Doe (janedoe@XXXX.com)
- Web page address: (empty)
- IM address: (empty)

There are also sections for Phone numbers and Addresses:

- Phone numbers: Business... (0)1234-123456, Home..., Business Fax..., Mobile...
- Addresses: Business... (empty)

At the bottom left, there is a checkbox labeled "This is the mailing address" which is currently unchecked.

- Click **Save and Close** to close the contact and have it entered in the contact list.

8.1.2 Finding a Contact

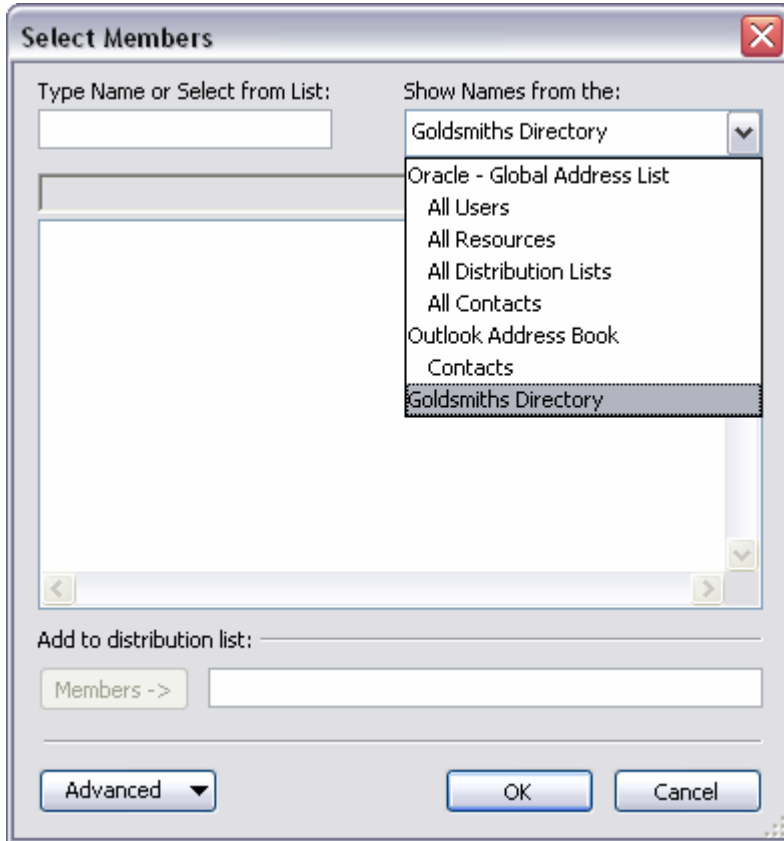
- Type **Jane Doe** in the **Find a Contact** field on the **Standard** toolbar.
- Press **Enter** to open the contact's information box.

8.1.3 Editing a Contact

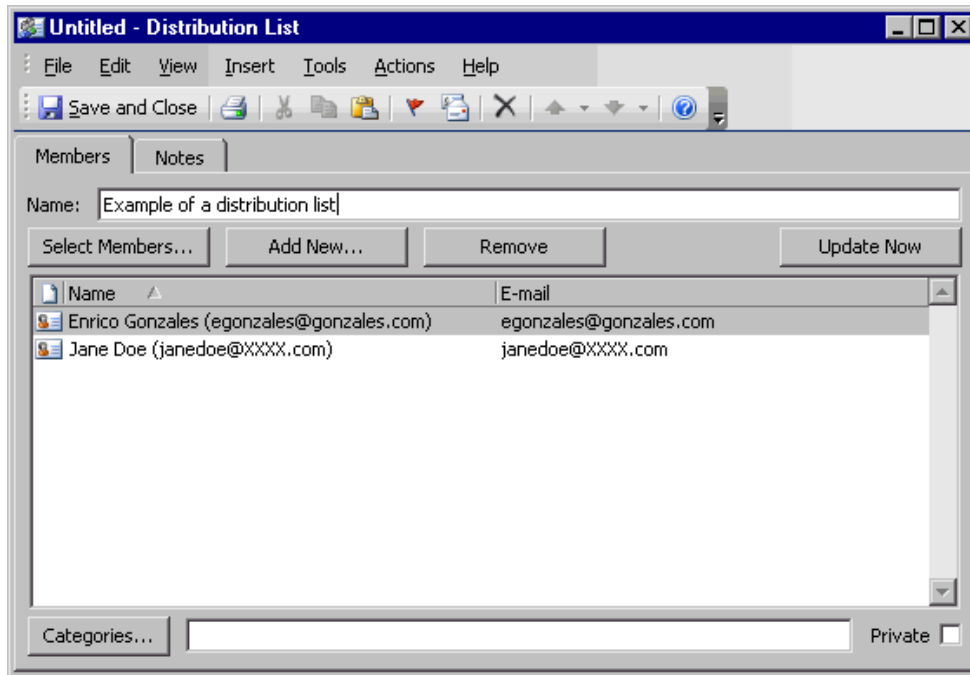
- 1) Select **Contacts** in the Navigation Pane.
- 2) Double-click on the contact in the Folder Pane.
- 3) Enter the edit text.
- 4) Click Save and Close.

8.1.4 Creating a Distribution List

- 1) Select **Contacts** in the Navigation Pane.
- 2) From the main menu, choose **Actions** ⇒ **New Distribution List** to open the **Distribution List** dialog box.
 - a) **OR** press the **CTRL + SHIFT + L** key combination.
- 3) Click the **Select Members...** button to open the **Select Members** dialog box:



- 4) To add people from your address book click on the drop-down list labelled **Show Names from the:**
 - a) Select **Contacts**
 - b) Double-click on the contact from the **Name** list in the middle to place it in the **Add to distribution list** on the bottom.
- 5) If you want to add people from the College, select **GC Directory** from the drop-down list labelled **Show Names from the:**
 - a) Click on the button at the bottom of the dialog box **Advanced** ⇒ **Find...** ⇒ and enter the surname etc. This will find all the people matching your search terms and will place their email addresses in the middle pane.
 - b) Double-click to add to the distribution list as above.
- 6) Click **OK** to return to the **Distribution List** dialog box
- 7) Type a suitable name in the **Name** field:



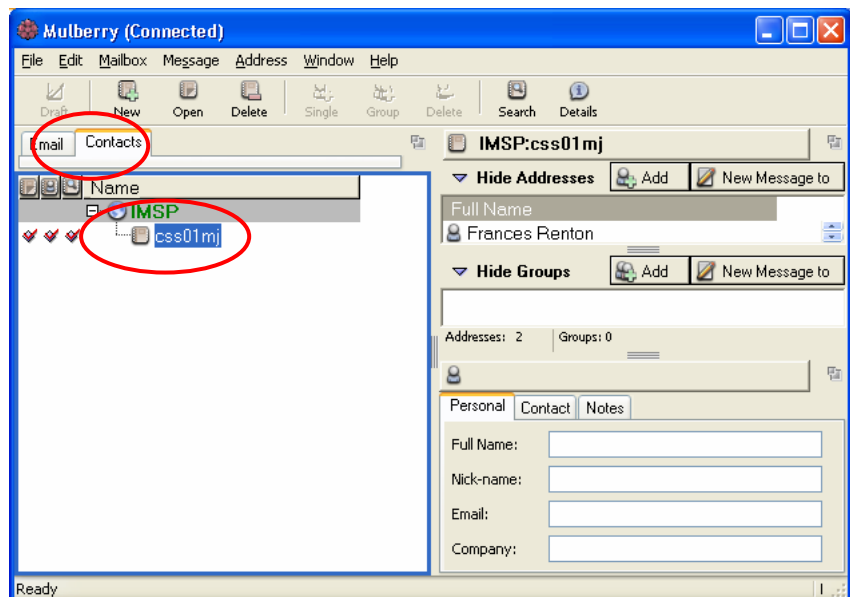
- 8) Click Save and Close.
- 9) To send a message to your list, highlight the name, right-click and select **New Message to Contact**.

8.2 Importing Contacts from Other Email Systems

You may have built up a substantial number of contacts in another email program such as Mulberry. Rather than having to re-enter them, you can export them from the other program and import them into Outlook. Once you use Outlook as your default email program your contacts will not be automatically updated in the program from which you exported them. There should be a similar process for most email programs.

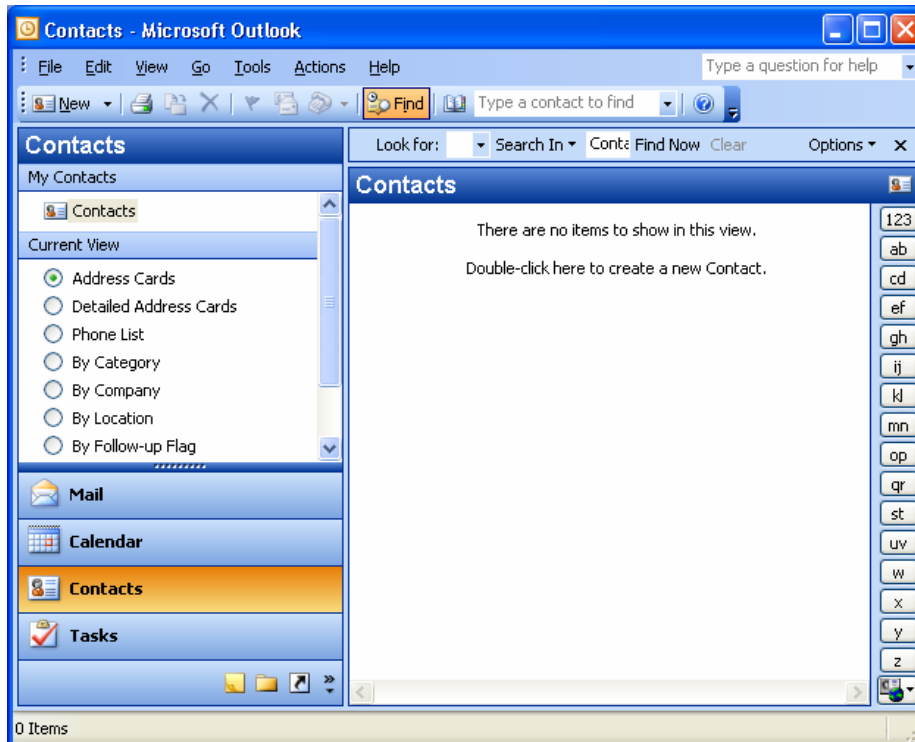
8.2.1 Exporting from Mulberry

1. Click on the **Contacts** Tab.
2. Double-click on your **username** e.g. css01mj under **IMSP**.
3. Select **Address** ⇒ **Export Addresses** ⇒ **Outlook**.
4. Save the file with an appropriate filename e.g. contacts.txt



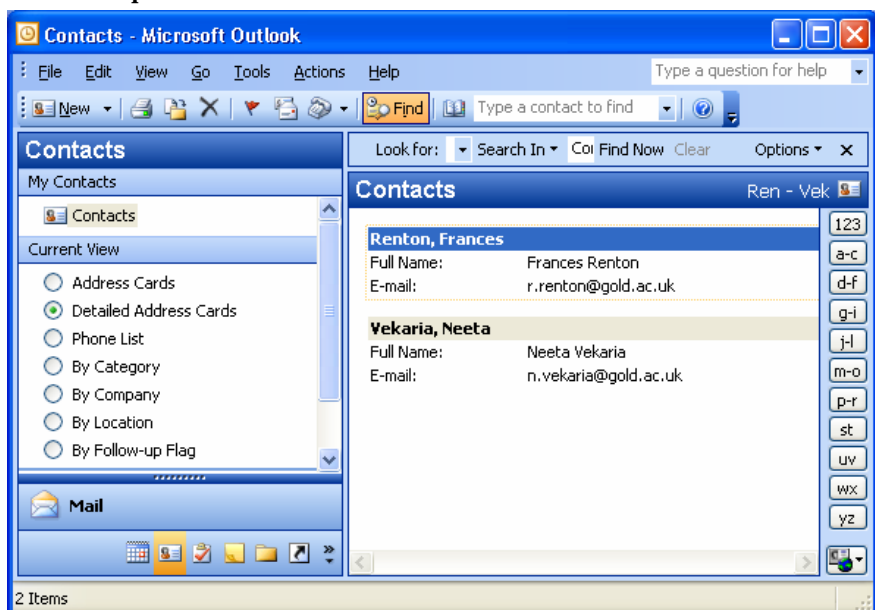
8.2.2 Importing into Outlook

Open Outlook, and click on the **Contacts** tab (bottom left of the Outlook window).



1. Select **File** ⇒ **Import and Export...** from the top menu.
2. Select **Import from another program or file** and click **Next**.
3. Select **Tab separated values (Windows)** and click **Next**.
4. Outlook may say that it needs to install some components. You should allow it to do so.
5. Select **Browse** to find your export file from Mulberry (e.g. contacts.txt).
6. Select **Allow duplicates to be created** and click **Next**.
7. The destination folder **Contacts** should already be selected. Click **Next**.
8. Ensure that your selected file to be imported is ticked and click **Finish**.

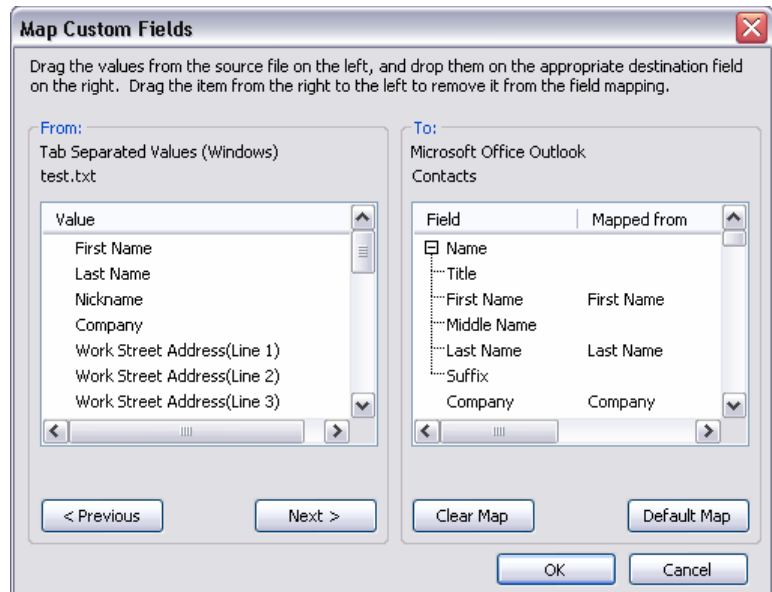
Outlook should import your contacts, which you will see displayed in the Contacts panel.



8.2.3 Importing into Outlook – Troubleshooting

If some contact information appears not to have been imported, repeat steps 1-5 above, and then follow the instructions below.

6. Select **Replace duplicates with items imported** and click **Next**.
7. The destination folder **Contacts** should already be selected. Click **Next**.
8. Ensure that your selected file to be imported is ticked, and select **Map Custom Fields...**
9. The fields shown in the left hand pane are the fields from Mulberry, and on the right the fields which are available in Outlook. Make sure that all fields that you need from Mulberry are dragged and dropped into the corresponding field on the right hand pane.
10. Click **OK**, then **Finish**.



Outlook should now import your contacts, which you will see displayed in the Contacts panel as above.

9 Overview of Outlook Functionality

Since we are not currently running an Exchange server there may be some advanced features which you cannot use, which you might have expected if you have used Outlook before. Also there are some features of Mulberry, which are not available in Outlook.

Available

- **Central sent-mail**
Please see section 3.1.
- **Goldsmiths Directory**
This contains the email addresses of all staff and students. Please note that this service is not available for home use at present.
- **Personal Calendar**
The personal calendar feature will allow you to arrange meetings with people across the College, and will update the Oracle Calendar.
- **Viewing shared mailboxes**
You can view mailboxes that others have shared with you, but cannot share your mailboxes from within Outlook.

Not Available

- Centrally stored preferences
- Centrally stored address book
- Shared address book
- **Sharing mailboxes (available on request only)**
To allow a person access to a mailbox owned by you, please email sysadmin@gold.ac.uk with your username, the name of the mailbox(es) you would like to share, and the username(s) of the person with whom you would like them to be shared.
- **Identities**
This feature of Mulberry is not available in Outlook.

9.1 Outlook Support from ITS Helpdesk

First check online <http://www.goldsmiths.ac.uk/it/apps/outlook/ocfo/>

If you cannot find the answer to a question, please contact the IT Services Helpdesk on extension 7555 or email them on helpdesk@gold.ac.uk.

9.1.1 We Do Support

IMAP (that is, server-based) email.
Outlook email contacts.
Export/Import address books from Mulberry to Outlook.
Outlook Calendar and Tasks

9.1.2 We Don't Support, But Document

Outlook Journal and Notes – see ITS Guide C4.32 Unsupported Outlook Features
Importing PST files – see ITS Guide C4.33 Importing PST files

9.1.3 We Don't Support

POP email – this is where you download your email to your local machine, leaving no copy on the server.
PDA access to email – the variety of PDAs is too wide to offer support.
Outlook from home.
Outlook archiving – all your email is stored on the server so this is not necessary.