

MICROSOFT OUTLOOK



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IT DEPARTMENT

**COMMUNITY
EDUCATION &
WORKPLACE
TRAINING**

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MS Outlook

Microsoft Outlook includes a suite of email and productivity tools to allow the user to better manage their email communications, appointments, and tasks.

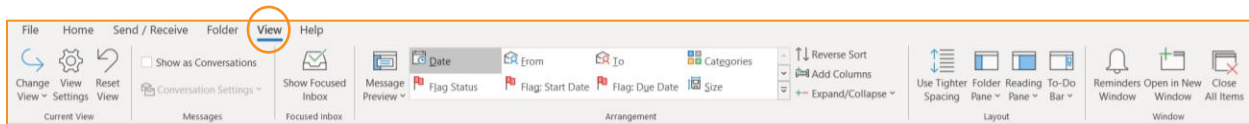
MS Outlook Mail

Outlook Mail View

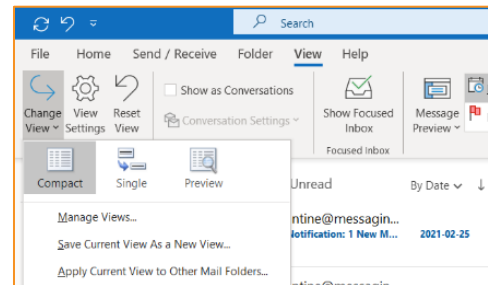
By default, there are three views available: Compact, Single, and Preview.

To change how Outlook displays email:

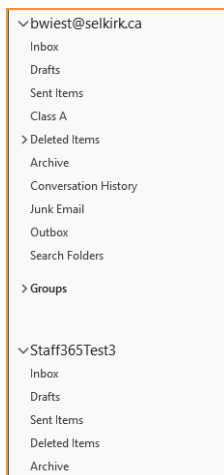
1. Left click on the *View* tab at the top of the Outlook screen.



2. On the far-left side of the Ribbon is the *Change View* option.
3. For the purposes of this learning session, select *Compact*.



Shared Mailboxes (Proxies)

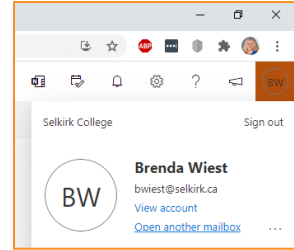


Some individuals have access to more than one mailbox. Additional mailboxes can be displayed in Outlook.

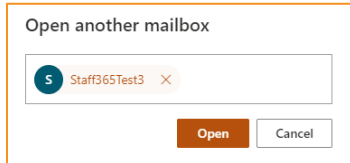
In using desktop Outlook, once your Admin has added you as a member of a shared mailbox, the mailbox will automatically appear in your *Folder Pane*. If it is not visible, close and restart Outlook.

When using the *Web Based Outlook*, you have two methods of accessing a shared mailbox.

Method 1: will display the mailbox requested provided you have been given permission to view it. It will be the only mailbox displayed in the *Folder Pane*.



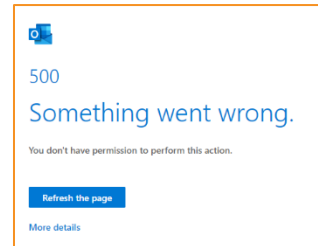
1. Left click on the circle with your initials (top, right corner of the screen).



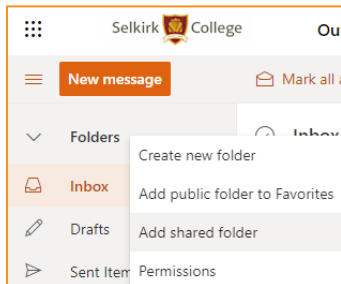
2. Choose *Open another mailbox*.
3. Enter the email address for the mailbox you wish to access.
4. Left click on *Open*.

The requested mailbox is now displayed.

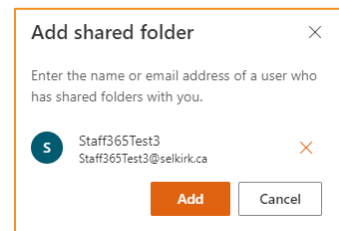
Note: If you do not have permission to access the mailbox you will receive an error message.



Method 2: will display the shared mailbox under your personal mailbox in the *Folder Pane*.

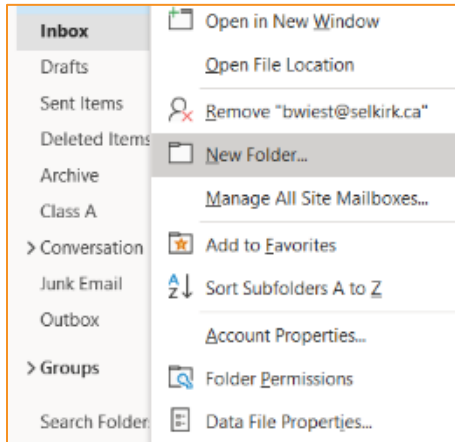


1. Right click on *Folders* (left side of screen).
2. Choose *Add shared folder*.
3. In the *Add shared folder* dialogue box, enter the email address of the mailbox you would like to access and left click on *Add*.
4. The new mailbox will appear below your personal mailbox in the *Folder Pane*.

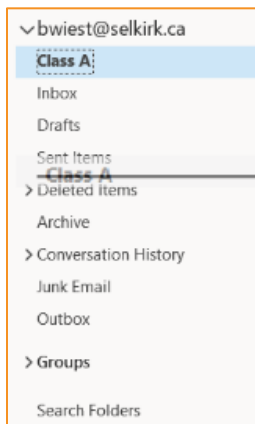
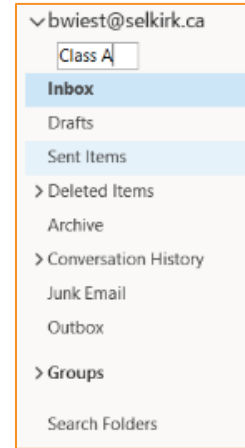


Creating and Moving Folders

Folders can be created in Outlook to assist with keeping emails organized and easy to locate.



1. Right click on your email address in the far-left pane of Outlook Mail to be able to access a short-cut menu.
2. Left click on *New Folder...* A small text box will appear directly under your email address. Type the name of the new folder and when done hit *Enter* on your keyboard.



Note: Once you hit the *Enter* key, the folder you just created may move to a different location in your listing of folders. To move it, single left click on the folder name, hold your left-mouse button down and drag it to its new location. A solid black line will appear to show you where the folder will move to. When you have positioned the folder where you would like it, release the mouse button.

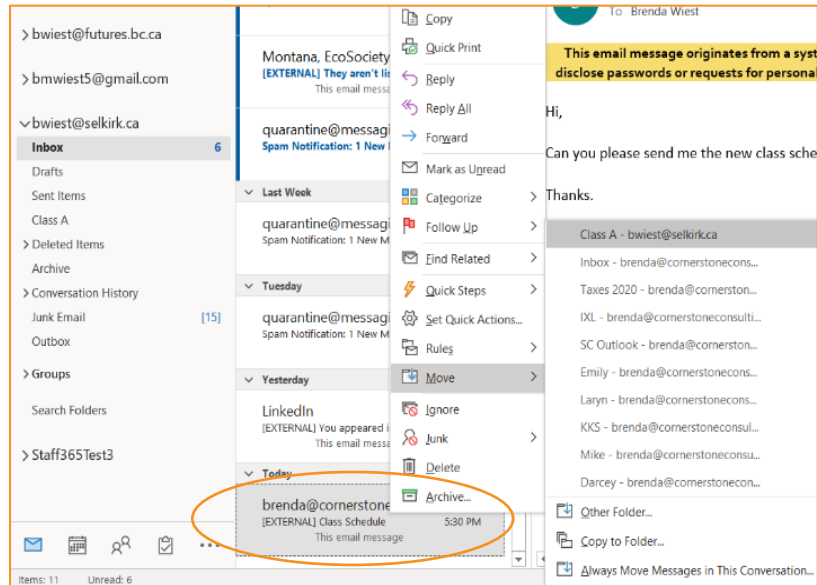
Moving Email Messages from One Folder to Another

There are two ways to move an email message from one folder to another:

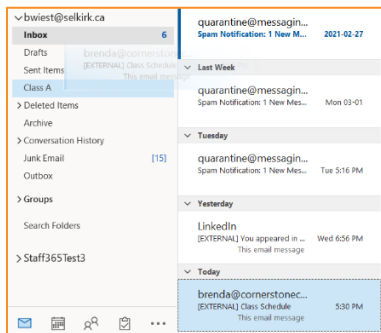
Method 1:

1. Right click on the email you wish to move to a different folder to obtain the short-cut menu.
2. Select *Move* and in the sub-menu select the folder to which you would like to move the email.

Note: You can also *Copy* the email to a second folder leaving the original email in the *Inbox* and creating a copy of it in the second folder.



Method 2:



1. To select the email that you want to move, single left click on it.
2. Hold the left mouse button down and drag the email to the new folder by moving your mouse so the new folder's name is highlighted in the far-left pane.
3. Release the mouse and the email will move to the new folder.

Note: To Move or Copy multiple emails at once, do one of the following:

1. If the emails are consecutive in the folder, single left click on the first one in the list to select it. Move the mouse to the last email of the group (not holding down the mouse button). Before clicking on the last email in the group, hold down your *Shift* key on your keyboard, then single left click on the last email in the group. Release the *Shift* key. All the emails, including the ones click on, will be highlighted. Right click anywhere on the highlighted area and choose the *Move* or *Copy* options as noted in Method 1 or drag the group to the new folder as described in Method 2.
2. If the emails are not consecutive in the folder, single left click on the first email to be moved or copied. Hold down the *Ctrl* key on the keyboard, and continue to single left click on other emails to be moved/copied to the new folder. Once all emails are selected, right click on any of the highlighted emails and choose the *Move* or *Copy* options as noted in Method 1 or left click on any of the highlighted emails and drag the group to the new folder as described in Method 2.

Add a Selkirk Branded Signature

1. The signature template: <https://selkirk.ca/sel-sig.htm>. Select it (*Ctrl + A*) and copy it (*Ctrl + C*).

[Your Name], [Your Credentials]

[Your Title]

Selkirk College, West Kootenay & Boundary Region

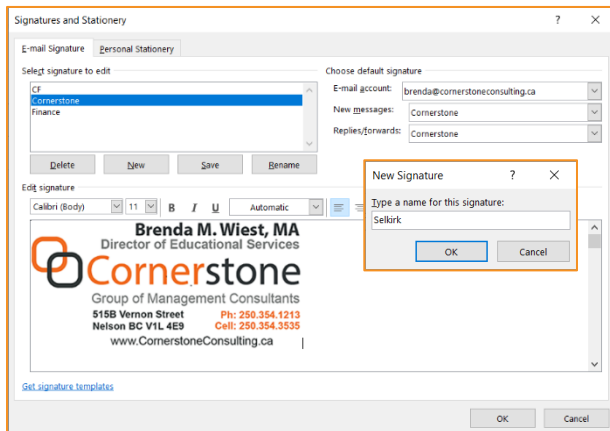
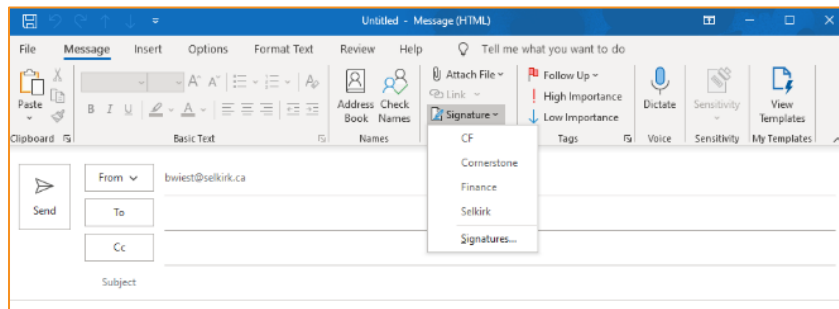
t: [Your Telephone] or [1.866.301.6601](tel:18663016601); ext. 11384 | e: [Your Email] w: selkirk.ca

Together we build remarkable futures

Selkirk College acknowledges the traditional territories of the Sinixt (Lakes), the Syilx (Okanagan), the Ktunaxa, and the Secwépemc (Shuswap) peoples.



2. On Outlook Ribbon, left click on *New Email* (far left side).
3. On the new email's Ribbon, left click on the arrow under *Signature* (middle of Ribbon) and select *Signatures*.

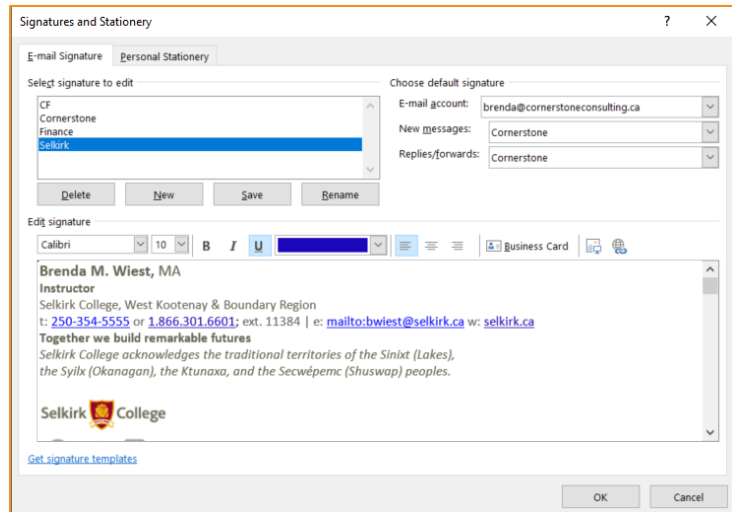


4. Left click on *New* located in the top left corner of the screen. In the dialogue box that appears, type the name of your new signature. Keep in mind that if you have multiple signatures you will need to be descriptive in your naming of each one.
5. Click on *OK*.

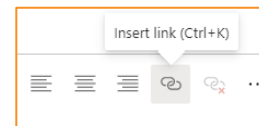
6. The new signature name is added to the signature list and the *Edit Signature* area at the bottom of the screen is available for creation of the signature.

7. Paste the Selkirk signature template into the *Edit Signature* area and edit the fields, as required.

Note: Select the fields including the [] when entering your information.



8. To link your telephone number:
 - a. Select the telephone number and left click on the *Link* button.



- b. In the *Insert Link* dialogue box, ensure your phone number shown in the *Display As* field is how you would like it to appear, and the *Web Address (URL)* should read tel:250354555 (your number).
 - c. Left click on *OK*.

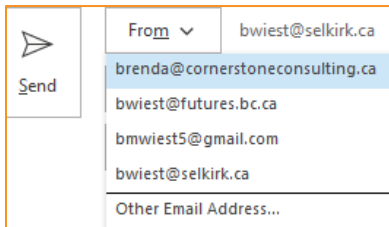
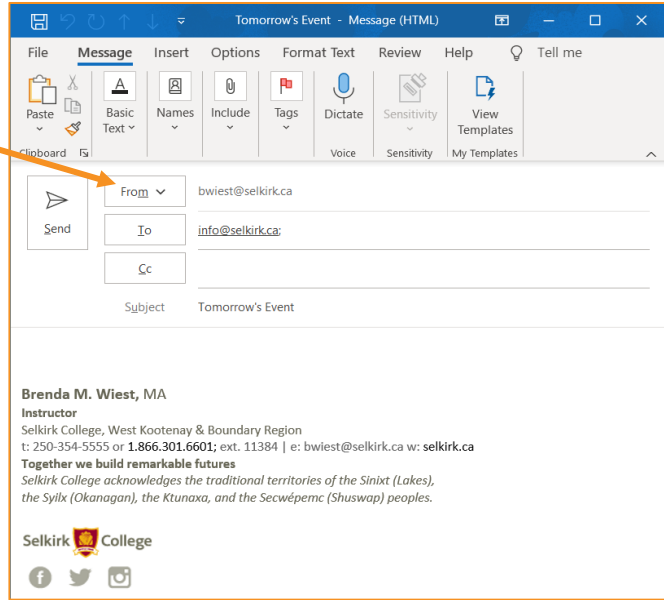


9. To link your email address:
 - a. Select your email address and left click on the *Link* button.
 - b. In the *Insert Link* dialogue box, ensure the *Display As* field is correct and the *Web Address (URL)* field reads: <mailto:emailaddress@selkirk.ca>
 - c. Left click on *OK*.



10. In the top, right corner of the screen, choose your default signature. This is the signature that will appear in all your emails. This can be changed later in any particular the email.
11. Left click on *OK*.

12. Each time you create a new email, your default email address will appear in the *From* box and your signature will appear in the body of the email.



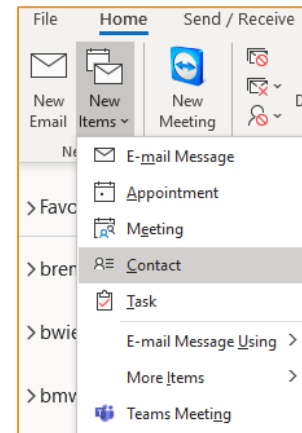
Note: To change the *From* email address, left click on the drop-down arrow on the *From* button and select the preferred email address.

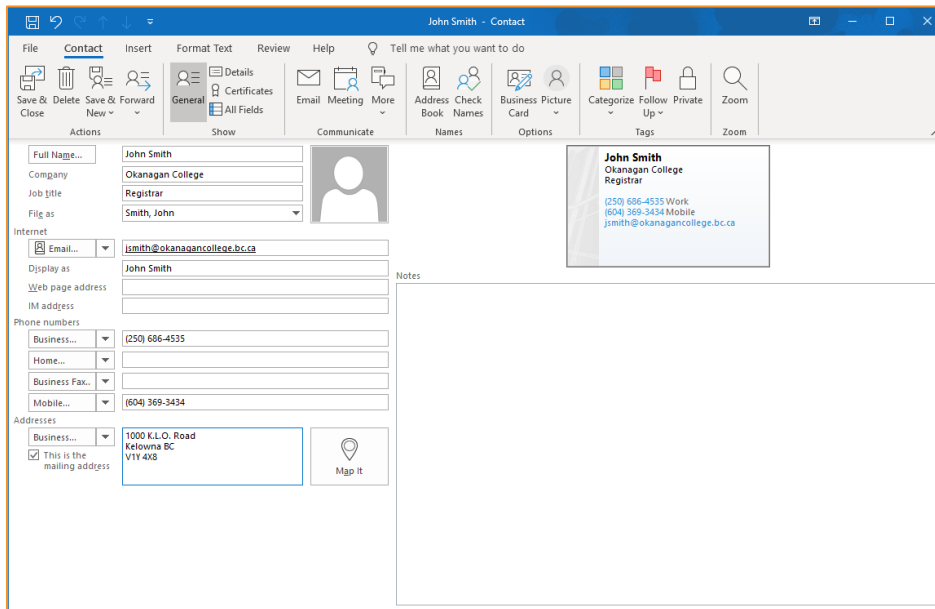
Creating a New Contact or Group

A new contact can be created from scratch or from an email.

Creating a New Contact from Scratch

1. On the *Home* tab, left click on *New Items* and select *Contact* from the drop-down list.
2. Enter the information into the fields, as required.

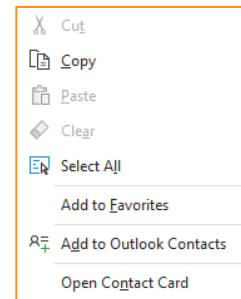




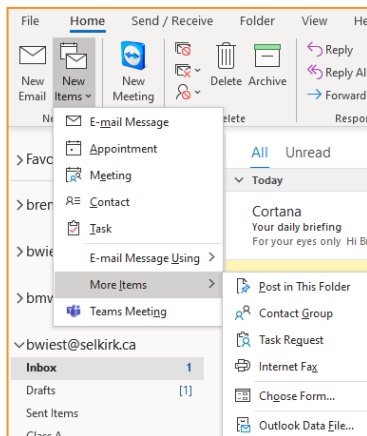
3. Left click *Save & Close* (top left corner of Ribbon). If you want to add an additional contact, select *Save & New* instead.

Creating a New Contact from an Email

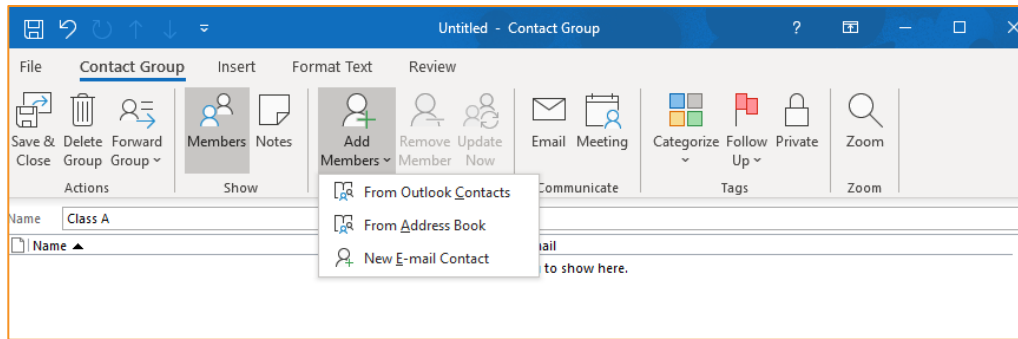
1. In the email message, right click on the individual's email address.
2. From the short-cut menu, select *Add to Outlook Contacts*.
3. The *New Contact* screen will appear with some information already populated. Complete the fields as required and save.



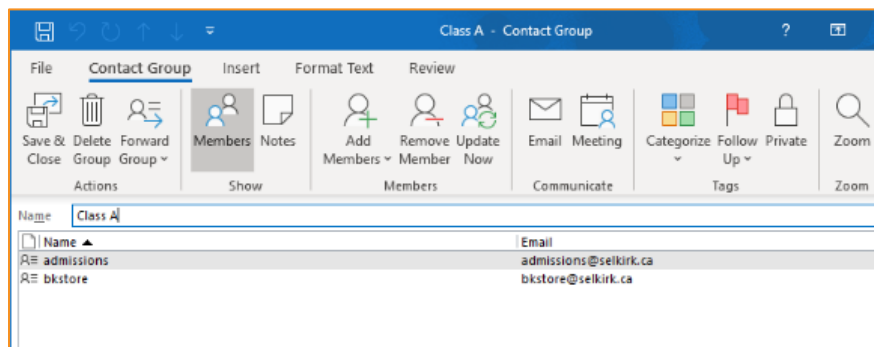
Creating a New Group



1. On the *Home* tab, left click on *New Items*, select *More Items* and then *Contact Group*.
2. In the *Contact Group* dialogue box enter the Name of the new group.
3. Left click on *Add Members* (on the Ribbon) and indicate where the new member's information is stored (Outlook Contacts or Address Book) or if the new contact will be added from scratch. Typically, the Address Book is an internal listing and Outlook Contacts is external.



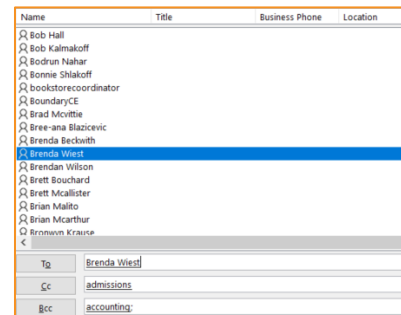
4. In the listing, double left click on each of the individuals assigned to the Group. Their name/email address will appear in the *Members* field at the bottom of the screen.
5. Once the Group list is completed, left click on *OK*.
6. The Group's members will now appear on the listing.



7. Left click on *Save & Close* (on the Ribbon).

Adding an Email Contact/Group to an Email

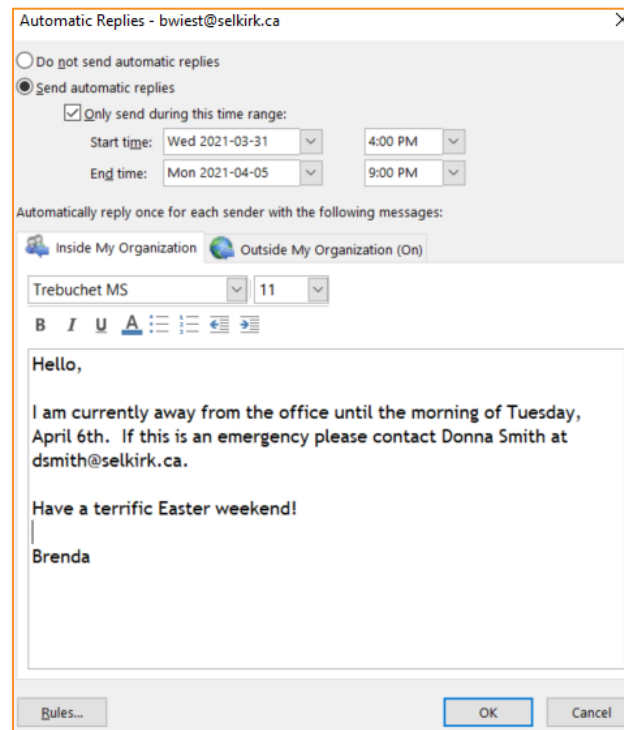
1. From the *Home* tab left click on *New Email* (left corner of Ribbon).
2. Left click on the *To* button to access the contacts.
3. If necessary, choose the correct address book from the drop-down listing (top middle of the screen). Single left click on their name in the listing and then click on the *To*, *Cc* or *Bcc* buttons at the bottom of the screen.
4. Left click on *OK*.



Creating an Auto Reply

For the times you may be out of the office or unavailable to respond to emails, an automatic reply can be set up in Outlook.

1. Left click on the *File* tab (top, left corner of Outlook screen).
2. Left click on *Automatic Replies (Out of Office)*. If you do not see that option in the white area of the screen, make sure your Selkirk email address is showing in the field at the top of the screen.
3. In the dialogue box that appears, left click on the option *Send automatic replies*.
4. You can indicate the date and time the auto reply should start and end. If you want to use this option, left click on the box before *Only send during this time range* and set your start and end date and time.
5. You can create two different email responses, one to emails coming from within the College and one for emails from outside. If you choose *Outside My Organization (On)* you need to indicate whether the auto reply is to go only to individuals who are in your contacts list already, or to anyone outside the College.
6. Create the email you would like to send in response to an incoming email from inside the College. There are font options to assist you.
7. Once you are done, you can left click on the *Outside My Organization (On)*, indicate whether this response is to go to only the individuals already in your contacts list or to everyone outside the College.
8. Create the response email.
9. Before you click on *OK*, you can set rules for your Auto Reply email.

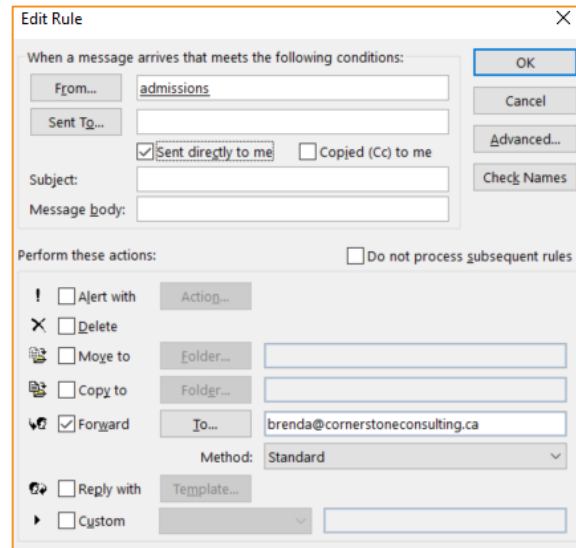


Rules for Auto Reply Emails

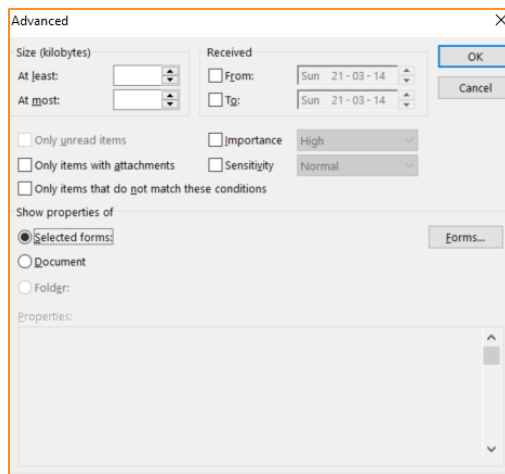
You can create a rule so that if an email arrives in your Inbox which matches the condition(s) that you have indicated in your rule, a particular action will be taken regarding that email. For instance, if the email is from a specific individual, you can have it automatically forwarded to another individual or email address. Other conditions include if it was sent directly to you or copied to you, or if the subject line or body of the message contains a certain word or string of words.

To set a Rule regarding your Auto Reply emails:

1. Left click on *Rules...* (bottom, left corner).
2. Left click on *Add Rule...*
3. Complete the required fields.



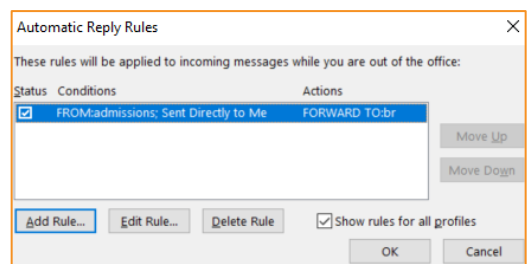
Note: To insert an email address in the *From* or *Sent To* fields left click on the button to access your contact lists.



Left clicking on the *Advanced* button provides additional options regarding the received email such as size, date received, and level of importance.

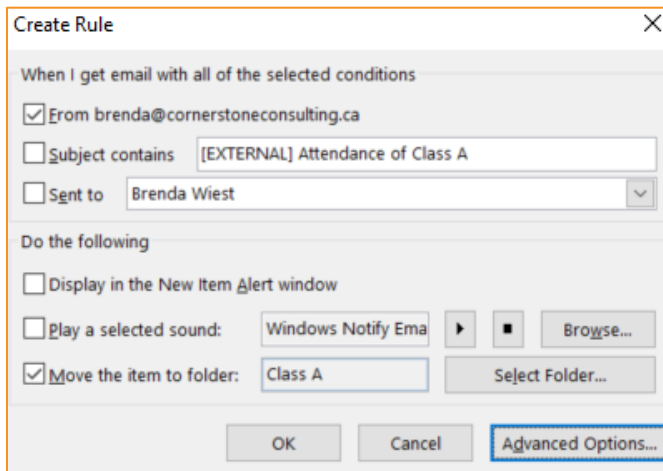
4. When all desired options are indicated, left click on *OK*. You may need to do so again if you were in the *Advanced* screen.

Once a rule has been created it will appear in the *Automatic Reply Rules* screen. Rules can be edited, deleted, or made inactive by deselecting the rule (taking the checkmark out of the box to the left of the rule).



- When all the required rules are created, left click on *OK* to return to the *Automatic Replies – your email address* screen.
- Left click on *OK*.

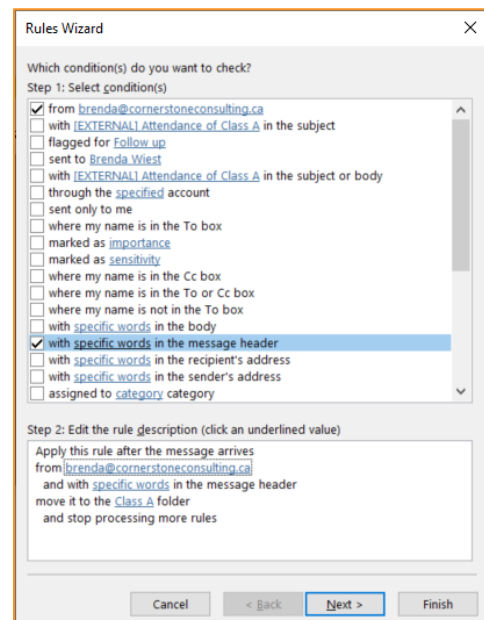
Creating Rules for Incoming Emails

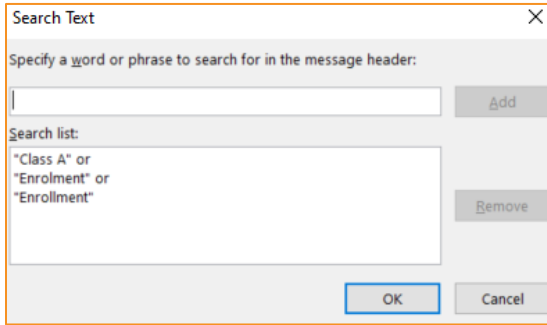


- Left click on the email for which you want to make a rule.
- On the *Home* tab, left click on *Rules* (middle of Ribbon), and then *Create Rule*.
- Select the criteria you would like for your rule using the top three options.
- Select what you would like to have happen if your criteria are met.

- Advanced options are available. Left click on *Advanced Options*.

Note: The criteria that you set in your rule are shown in the listing and the description of the rule is indicated in the bottom field. As you add additional conditions, the description will include this new information and provide you the opportunity to personalize it.

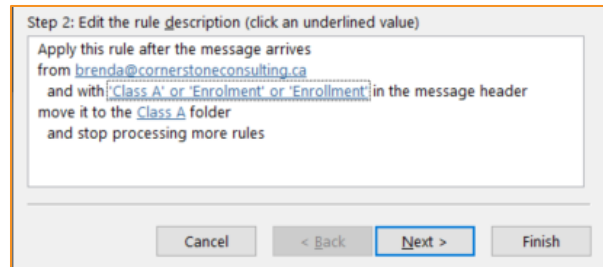




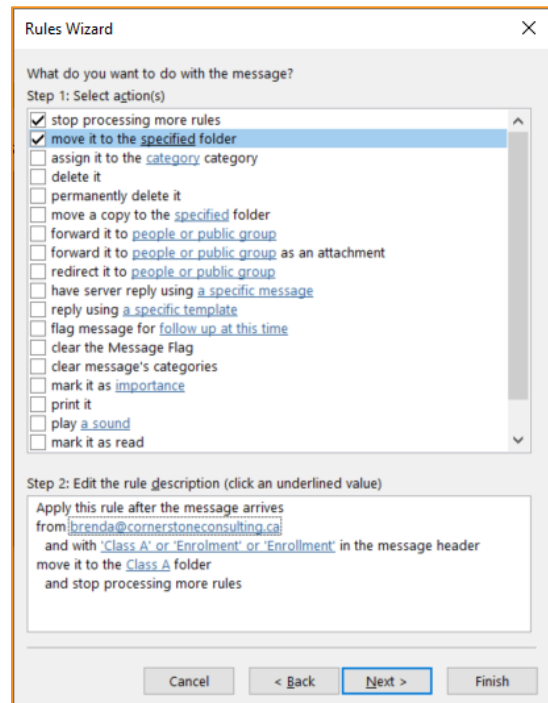
For instance:

If you selected the additional condition of *with specific words in the message header*, that will be added to the description below. Left clicking on the words specific words in the description will provide the *Search Text* screen so you can indicate the word or words you want Outlook to look for in the message header.

6. Left click on *OK* to return to the *Rules Wizard* screen.

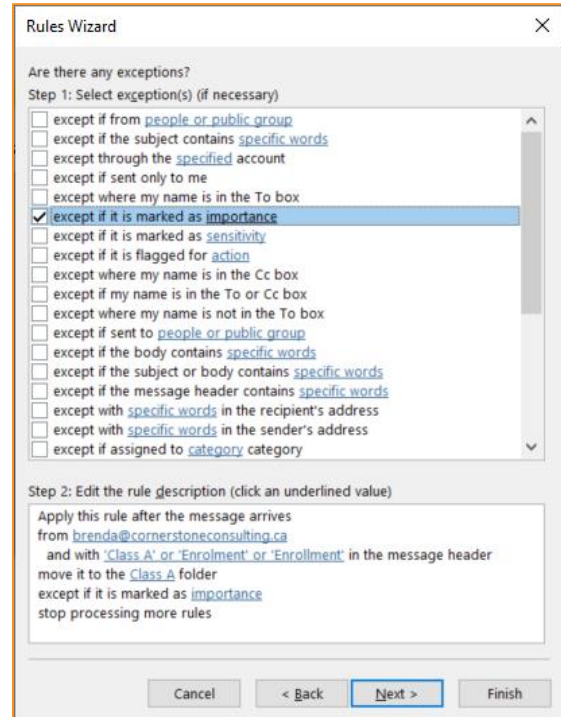
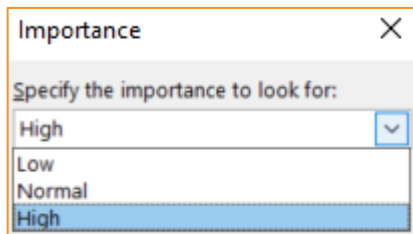


7. Left click on *Next* and indicate what you want to do with the message.
8. When you have completed any additions to this screen, left click on *Next*.



- Indicate if there are any exceptions to the rule you have created.

Note: The exception of the importance of the email has been indicated. Move to the description section of the screen and left click on importance to indicate what level is required.

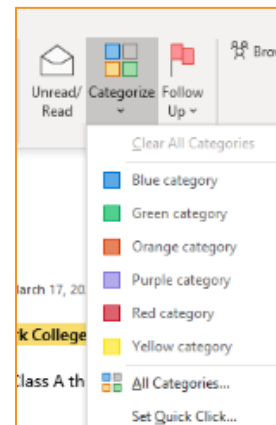


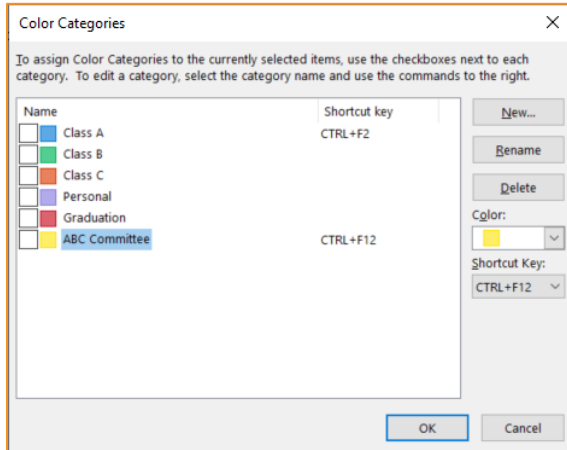
- Left click on *OK* to leave the *Importance* screen and return to the *Rules Wizard* screen.
- Indicate the name of this rule in *Step 1*.
- In *Step 2*, indicate whether you would like the rule to apply to emails you have already received or whether you want the rule to apply to any new emails.
- When completed, left click on *Finish*.

Categorizing Emails

Emails can be categorized by colour making it easier to recognize different topics, senders, etc.

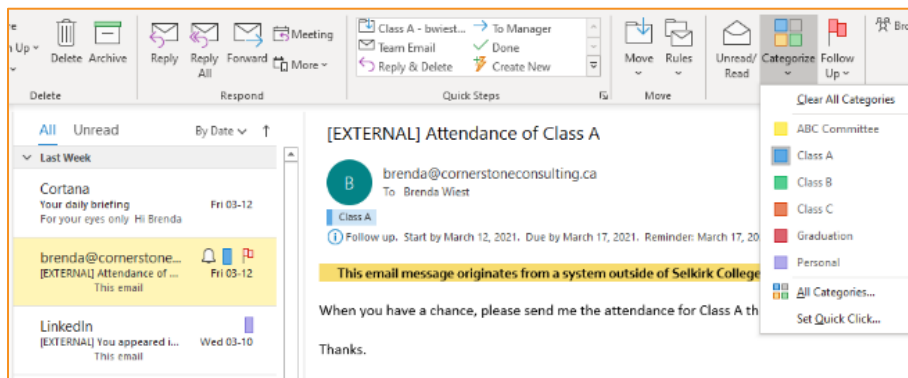
- On the *Home* tab, left click on *Categorize* (near middle of the Ribbon).
- Left click on *All Categories...*



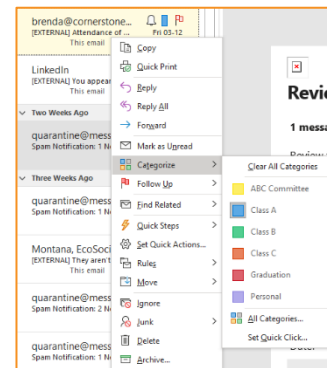


3. On the *Color Categories* screen, you can rename the categories, add additional colours, and create a short-cut to a particular colour.
4. Once you have completed personalizing the categories, left click on *OK*.

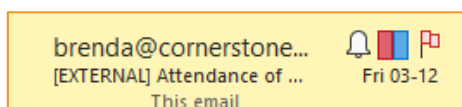
5. Select the email you want to categorize, left click on the *Categorize* option on the Ribbon (*Home* tab), and select the colour category. A rectangle of that colour will appear in the top right corner of the email.



Note: Alternatively, you can right click on the email you want to categorize, select *Categorize* from the short-cut menu, and then choose the category.

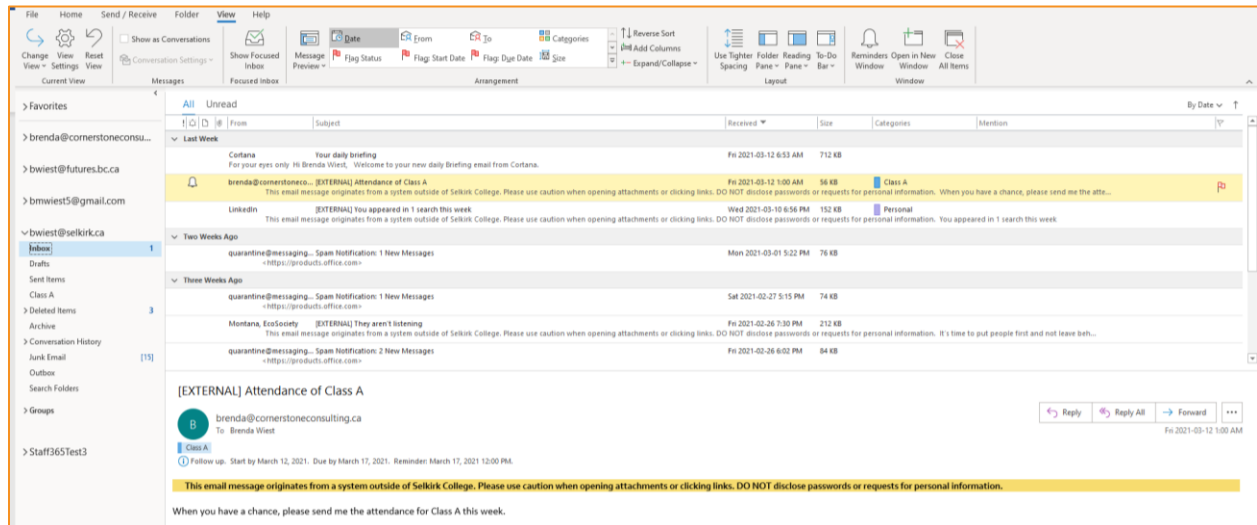


Note: You can assign more than one category to an email.



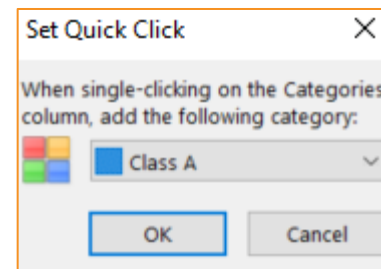
Quick Click

With *Quick Click* you can set it so that with a single click on an email, you can set it to a particular category – the most popular one. However, for this option to work you must either turn off the reading pane or set it so it is below the email messages. To do this, go to the *View* tab and select *Reading Pane*.



To set the *Quick Click*:

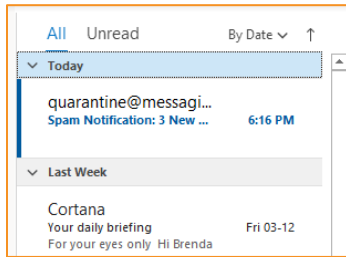
1. On the *Home* tab, left click on *Categorize*.
2. Left click on *Set Quick Click*.
3. Choose the category you would like to initiate when you single click into the category column. Typically, this will be the most popular category.
4. Left click on *OK*.



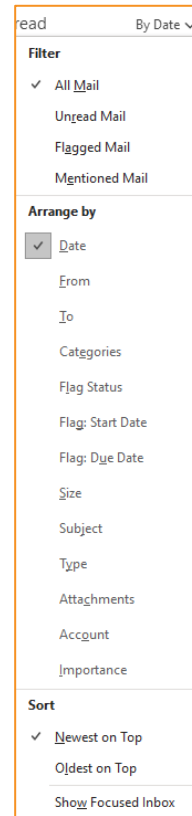
Received	Size	Categories
Fri 2021-03-12 6:53 AM	712 KB	
Fri 2021-03-12 1:00 AM	56 KB	Class A
Wed 2021-03-10 6:56 PM	152 KB	Personal
Mon 2021-03-01 5:22 PM	76 KB	
Sat 2021-02-27 5:15 PM	74 KB	

5. In this view (Reading pane is below email messages) you can move your mouse to any email's category column and a faint rectangle will appear. By single clicking on it, the rectangle will become the *Quick Click's* category. However, you can right click to access all other category options if you wish to choose a different category.

Outlook Mail View



By default, *All* emails are shown (as opposed to *Unread* or *Focused*), and sorted by *Date*.

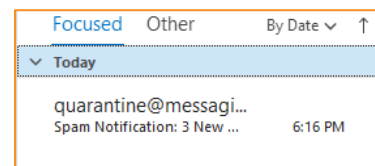


By left clicking on *By Date*, you can filter, arrange, or sort your email folder.

Focused Inbox View

Outlook studies the history of your email use, noting the types of emails you receive, their content, and the users you communicate with the most. It places these types of emails on a *focused* list enabling you to view them easily.

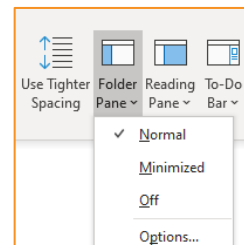
1. Left click on the *View* tab (top of screen).
2. Left click on *Show Focused Inbox* (left side of Ribbon).
3. Viewing options will change from *All* and *Unread* to *Focused* and *Other*.

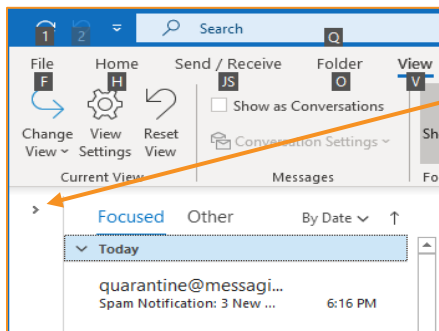


Mailbox Views

Folder Pane

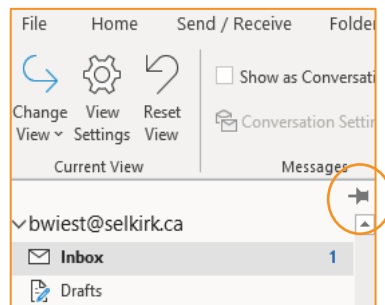
Normal – By default, shows folders within a mailbox.



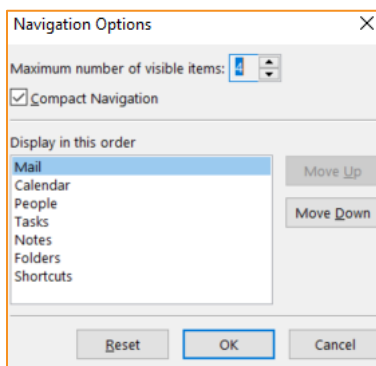


Minimize – Will minimize the folder navigation screen. To access the folders, left click on the arrow.

To have the folders remain visible, left click on the *Pushpin* image or return to *Folder Pane* and choose *Normal*.



Off – The folder navigation screen will disappear. To make it visible again, go to *Folder Pane* and choose *Normal*.

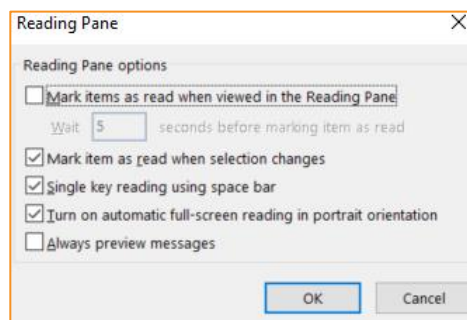
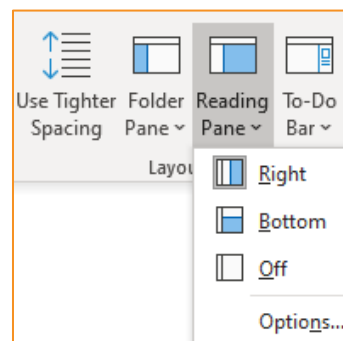


Options – is for the display of items at the bottom of the folder navigation screen. It allows you to indicate how many of the options are visible and the order in which they are displayed.



Reading Pane

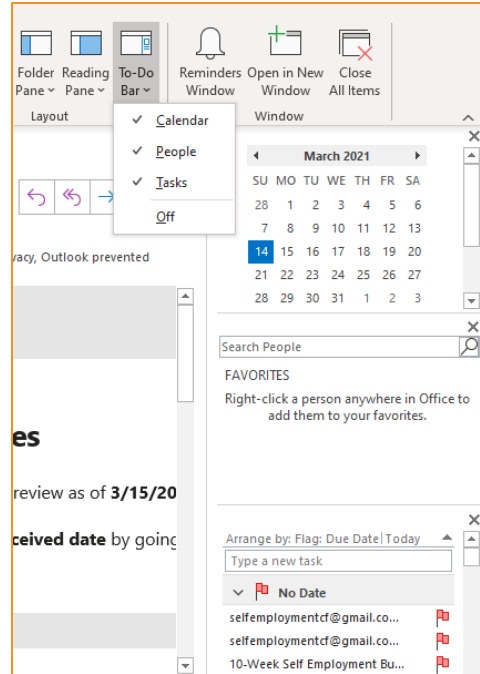
The *Reading Pane* is the part of the screen that displays the body of the email message. The *Reading Pane* button on the *View* Ribbon, provides options of where the *Reading Pane* is displayed.



The *Reading Pane Options* allows you to choose options with regards to when to mark the item *read* and message preview.

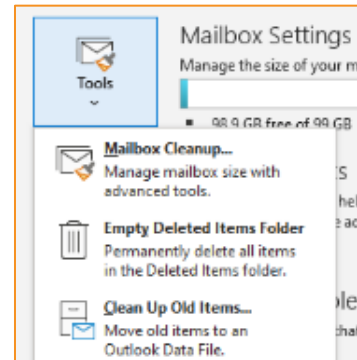
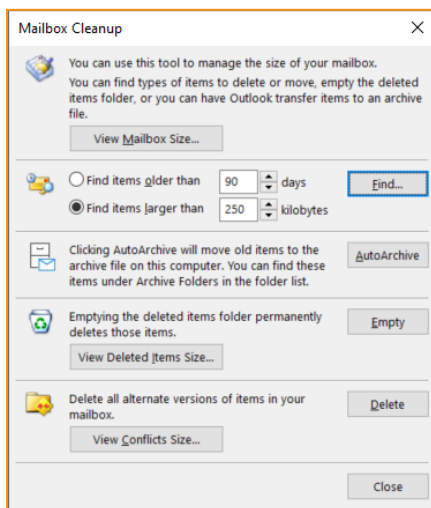
To-Do Bar

Allows *Calendar*, *People*, and/or *Tasks* to display in a navigation bar on the right-side of the screen.



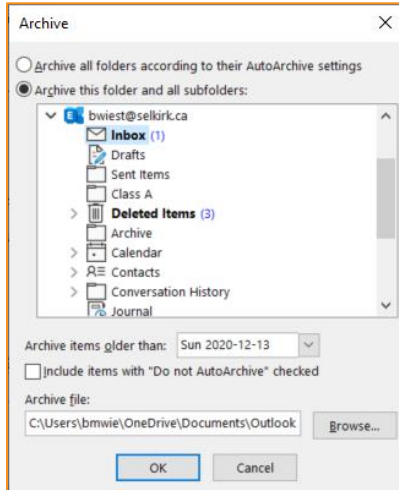
Important Notes

- As an Outlook desktop client, you have up to 50 GB of storage space. Therefore, it is important that you keep your mailbox clean to maximize performance. Ensure you look in your *Deleted Items* folder frequently, and permanently delete any emails that are no longer required.



Mailbox Cleanup... tools to assist with mailbox size and management.

Empty Deleted Items Folder will permanently delete all items in the *Deleted Items* folder.

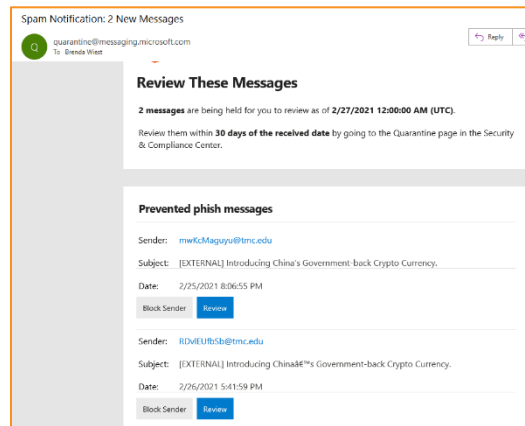


Clean Up Old Items.... Will archive older items to a file folder outside of Outlook Mail – typically a folder on the OneDrive.

- Check your *Junk* folder frequently. Sometimes an email will be identified as junk by Outlook and be directed to this folder accidentally.

- Read messages that you receive that have been quarantined. In the email message you will have the options of *Blocking Sender* or *Review*.

If you *Review*, you will be linked to a website which will display all your messages that are currently in quarantine and have not expired yet.



Selkirk College Office 365 Security & Compliance

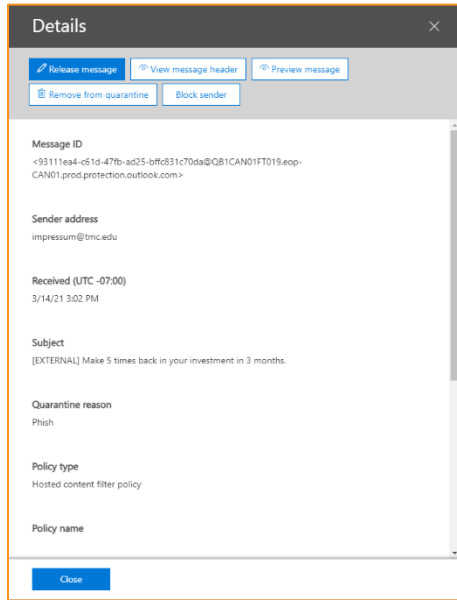
Home > Review > Quarantine

Quarantine

The email messages here were quarantined because they were classified as malware, spam, phishing, or bulk email or because of a transport rule setting in your organization. Review the messages and decide whether you want to release them to one or more of the intended recipients. Learn more about quarantined email messages.

Sort results by: Message ID (dropdown), Enter exact ID, address, or subject and then click Refresh. Only one (dropdown), Refresh, Filter, Modify Columns

<input type="checkbox"/>	Received (UTC -07:00)	Sender	Subject	Quarantine reason	Released?	Policy type	Expires (UTC -07:00)
<input type="checkbox"/>	3/14/21 3:02 PM	impressum@tmc.edu	[EXTERNAL] Make 5 times back...	Phish	No	Hosted content filter policy	4/12/21 5:00 PM
<input type="checkbox"/>	3/14/21 1:31 PM	Contact-694@thedeutsch.yyz	[EXTERNAL] Welcome to The K...	Spam	No	Hosted content filter policy	4/12/21 5:00 PM
<input type="checkbox"/>	3/14/21 12:44 AM	Contact-972@deutschclan.yyz	[EXTERNAL] CBD Gummies at ...	Phish	No	Hosted content filter policy	4/12/21 5:00 PM
<input type="checkbox"/>	3/9/21 7:08 AM	ovirod2016+129@googlemail...	[EXTERNAL] Re: Congratulation...	Spam	No	Hosted content filter policy	4/7/21 5:00 PM



Select a message by left clicking on the box to the left of the message, to view more options and details about the email.



PHISHING

A fraudulent attempt to obtain sensitive information or data, such as usernames, passwords, and credit card details, by impersonating a trustworthy entity.

SPAMMING

Use of messaging systems to send an unsolicited message to large numbers of recipients for the purpose of commercial advertising.

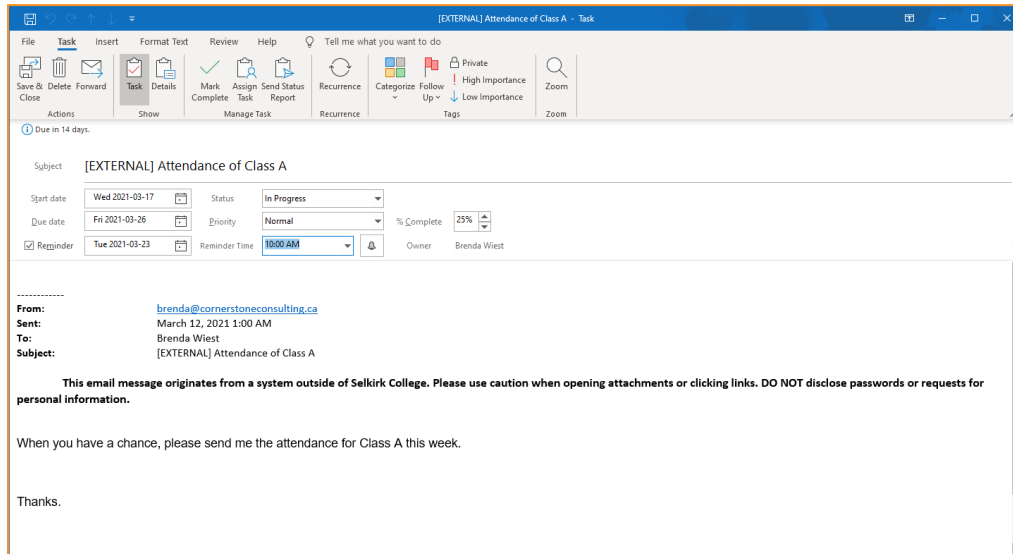
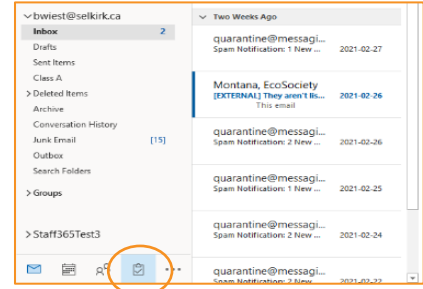
- You can not retract an email message once it is sent in Outlook.

Outlook Tasks

Often the number of new emails in a mailbox can be overwhelming. It is important to devise a method to quickly assess each new email to determine its importance how quickly you need to respond. Setting up a folder system in your mailbox to manage these emails could be solution. Creating folders such as *To Do* and *Follow Up* will allow you to move the emails that are not urgent out of the *Inbox*, causing less of a distraction.

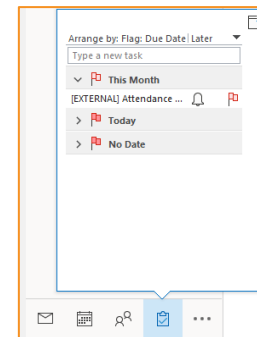
For some of the emails that have been moved out of our *Inbox* but still require attention, we may need a reminder to attend to them by a certain date. For these items you can add them to Outlook's *Task List*:

1. Left click on the email to select it.
2. Hold the left mouse button down and drag the email to the *Task List* icon. Release the mouse button.
3. The *Task* dialogue box will appear allowing you to input details of the task.

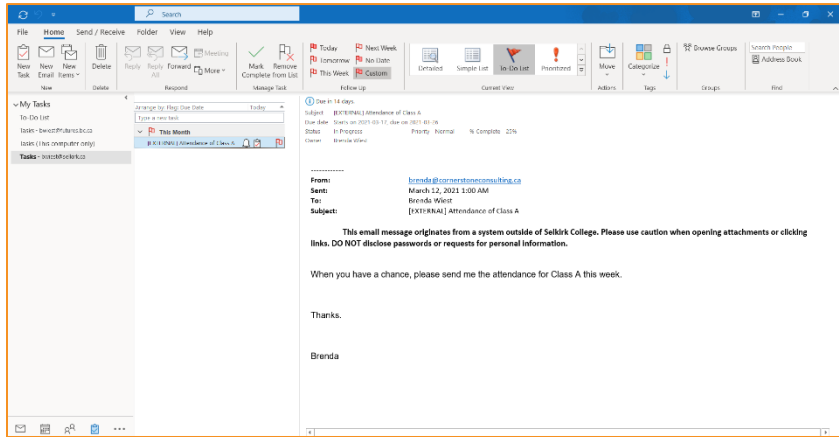


4. When the details of the task have been inputted, left click on *Save & Close* (top, left corner).

Note: If you set a reminder the task will pop up on your screen like a meeting reminder at the specified time.



5. The *Task List* can be accessed by moving the mouse to the *Task List* icon at the bottom of the screen....
 Or by left clicking on the *Task List* icon.

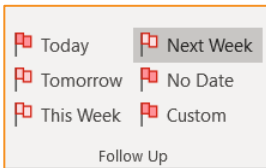
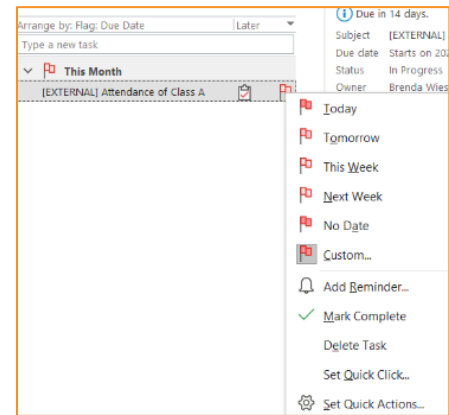


6. The Ribbon of the *Tasks* screen enables the user to change the view of the screen and categorize and/or flag tasks.

Follow Up Flags

Flags can be assigned to a task to indicate its importance/due date.

1. Right click on the flag displayed to the right of the task name.
2. Select the flag required.



Note: As an alternative, with the task highlighted, the flag type can also be selected on the Ribbon.

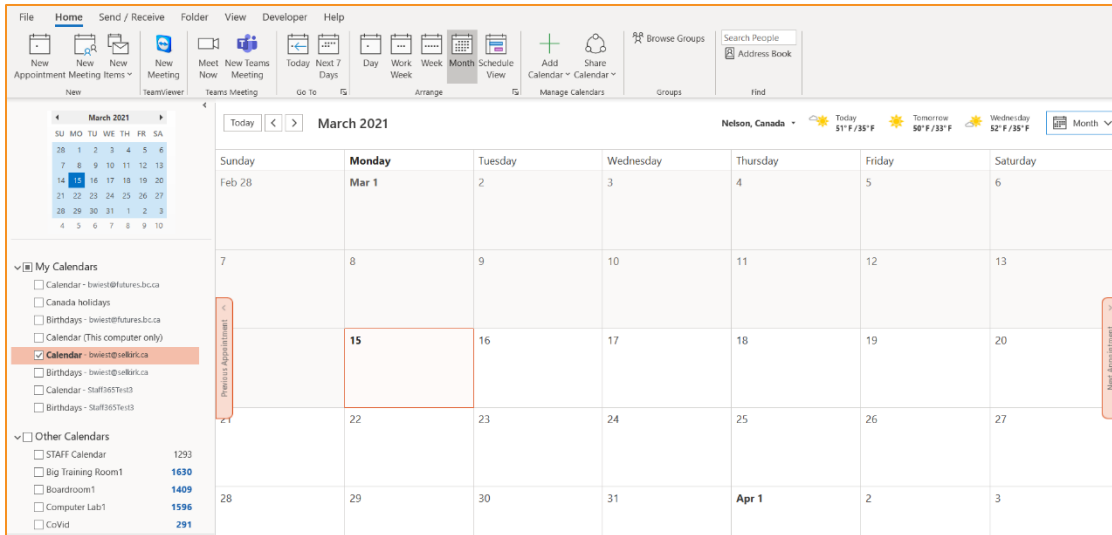
Outlook Calendar

Outlook Calendar is fully integrated with email, contacts, and other features to assist in scheduling appointments and meetings.

To access Outlook Calendar:

- From Outlook Email, left click on the calendar image at the bottom of the email folder navigation pane (bottom, left corner).





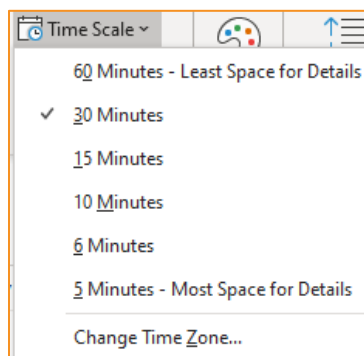
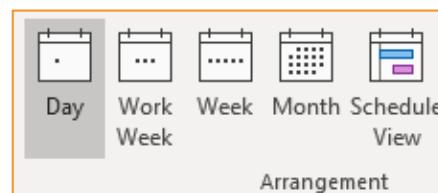
By default, the *Folder Pane* is displayed on the left side of the screen. It will include at least one month of calendar (sometimes two), and a listing of the calendars to which you have access. To access someone else's calendar, they will need to provide you permission.

The calendar for the currently month is displayed in the body of the screen. This view can be changed.

Changing the View

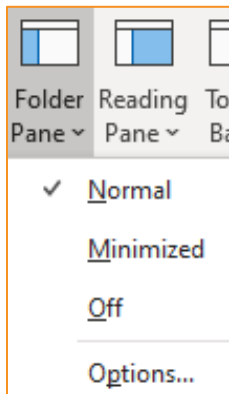
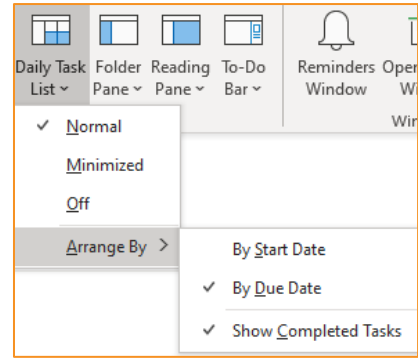
To change the view, left click on the *View* tab.

- The calendar can be displayed by *Day*, *Work Week*, *Week*, *Month*, or *Schedule View*.

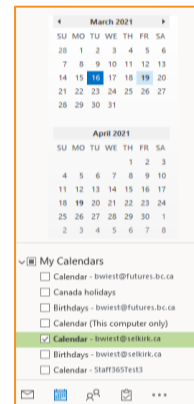


- When in any display other than *Month*, through *Time Scale* you can change the length of the time slots displayed in your calendar and/or the time zone.

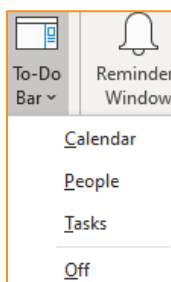
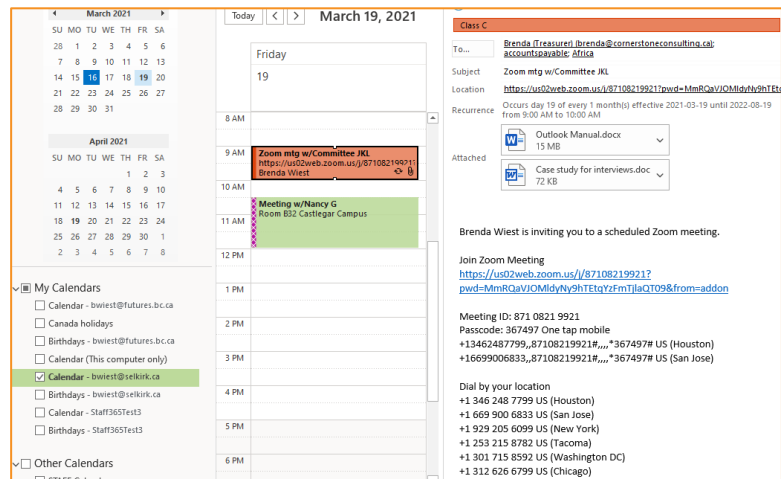
- *Daily Task List* can be turned on or off and arranged by *Start Date* or *Due Date*. *Completed Tasks* can be shown or hidden.



- *Folder Pane* will affect the display of the folder pane on the far, left side of the screen.



- The *Reading Pane* will provide the details of a scheduled appointment or meeting either on the right side of the screen, at the bottom, or you can turn it off.

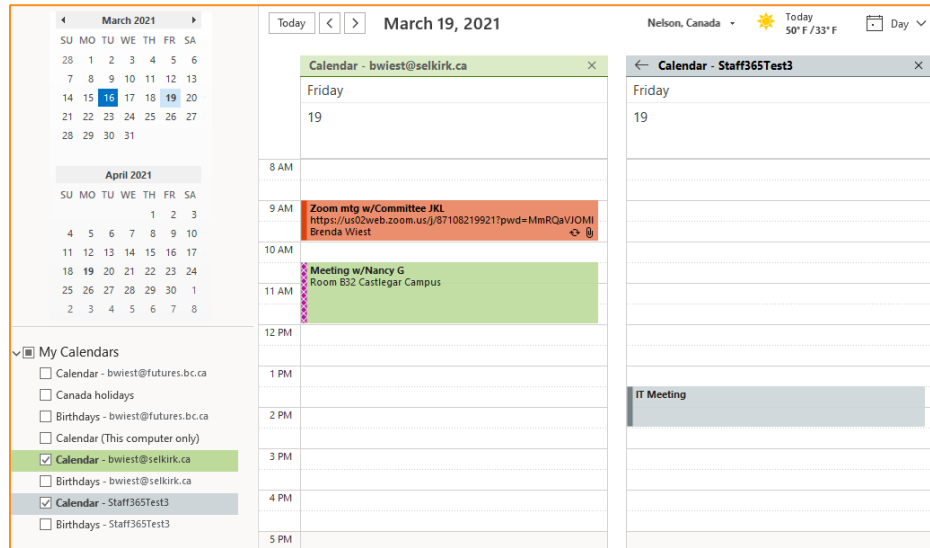


- The *To-Do Bar* will display your calendar, address list (favourites), and/or task list, if enabled.

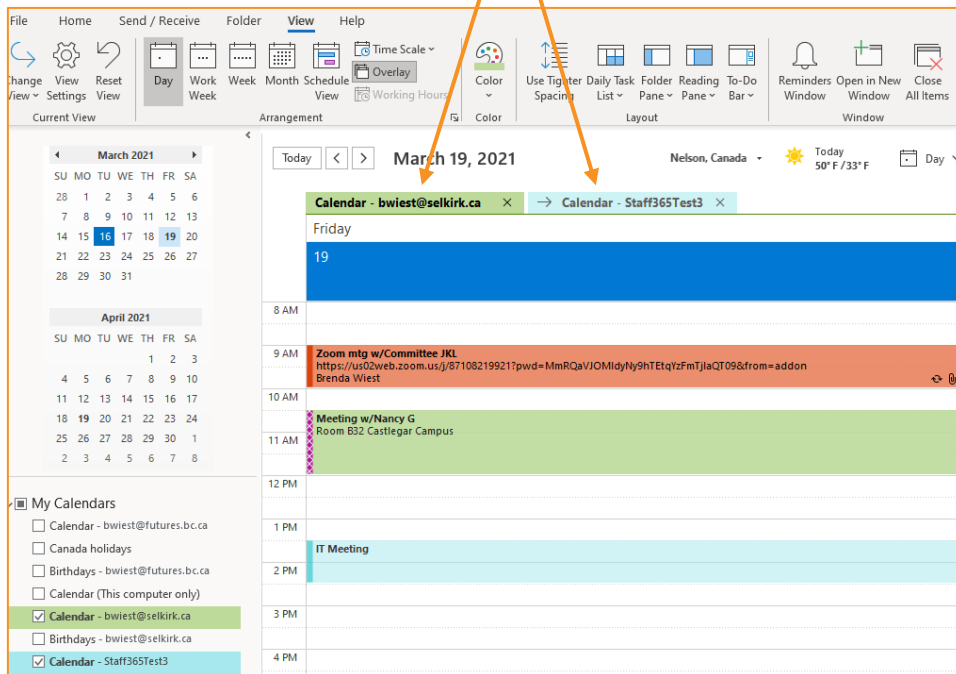
Viewing Calendars

Currently you have access to the calendars listed in the *Folder Pane*. To display the calendar, ensure there is a checkmark in the box to the left of the calendar name. You can display more than one calendar at a time by selecting multiple calendars.

Note: You can change the colour of a calendar by clicking on it to select it, left clicking on the *View* tab, and then left clicking on *Color* on the Ribbon.



Overlay, an option on the *View* tab's Ribbon, will merge your calendars into one. The appointments will be colour coded according to each Calendar's colour.

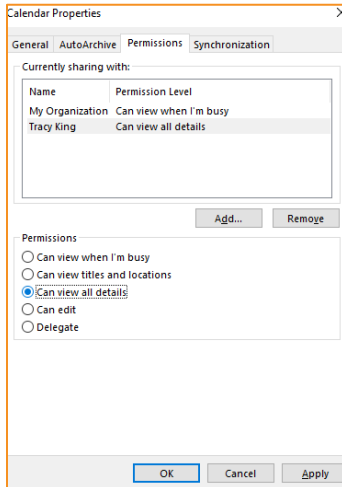
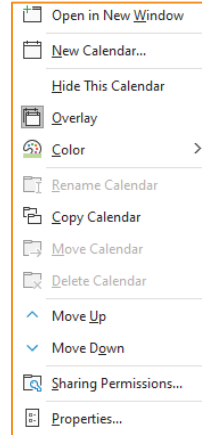


Sharing a Calendar

There are two methods in sharing your calendar.

Method 1:

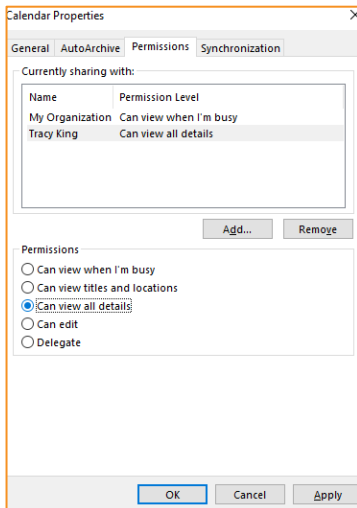
1. Right click on your calendar in the *Folder Pane* to display a short-cut menu. Left click on *Sharing Permissions...*



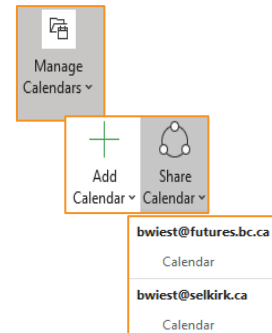
2. In the *Calendar Properties* screen, left click *Add...* to access your contact list, and select the person to whom you want to grant access to your calendar.
3. Indicate the level of permission you want to grant that person.
4. Left click on *OK*.
5. The person to whom you have shared your calendar will receive a sharing invitation by email. Once they click *Accept*, your calendar will appear in their calendar list.

Method 2:

1. On the *Home* tab, left click on *Manage Calendars* (middle of Ribbon).

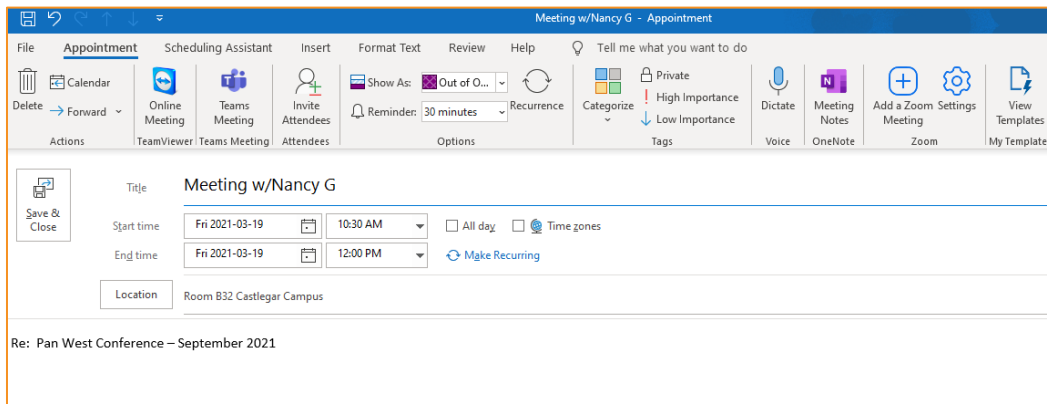


2. Left click on *Share Calendar* and choose the calendar you want to share.
3. In the *Calendar Properties* screen, left click *Add...* to access your contact list, and select the person to whom you want to grant access to your calendar.
4. Indicate the level of permission you want to grant that person.
5. Left click on *OK*.
6. The person to whom you have shared your calendar will receive a sharing invitation by email. Once they click *Accept*, your calendar will appear in their calendar list.



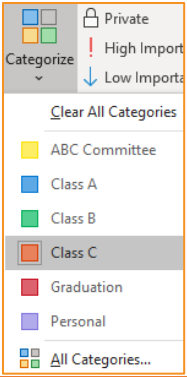
Setting Up an Appointment

1. On the *Home* tab, left click on *New Appointment* (far left on Ribbon).
2. In the *Meeting* screen, complete the necessary fields.



3. When setting up a meeting/event, there are many options that can assist in the scheduling.

<p>Show As:</p>	<p>Indicate whether you will be still available to other individuals during this time, busy, or out of the office.</p>	
<p>Reminder:</p>	<p>Do you want a reminder of this meeting/event? If so, how much time prior to the meeting/event do you want the reminder?</p>	
<p>Recurrence</p>	<p>Is this a meeting/event that will occur on a regular basis such as a Committee meeting that happens on 19th of every month until August.</p>	

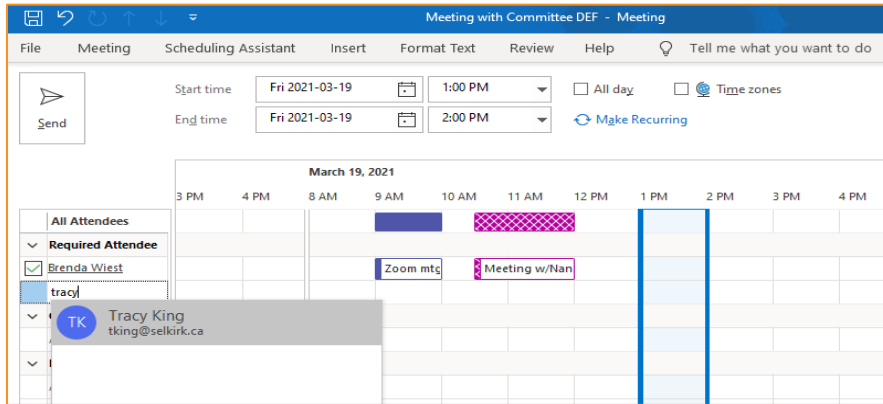
Categorize	Categorize the meeting/event using the same categories set up in your email.	
Private	Is this meeting/event Private? If you choose this option the meeting/event will not be visible to anyone with whom you have shared your calendar.	
High Importance	Is this meeting/event High Importance?	
Low Importance	Is this meeting/event Low Importance?	
Add a Zoom meeting	A Zoom meeting invitation can be created and added to the meeting/event invitation by logging into your Zoom account and creating it. The invitation will appear in the body of the meeting/event invitation.	

Note: Files can be attached to the meeting/event invitation by left clicking on the *Insert* tab and *Attach Item* (left side of Ribbon).

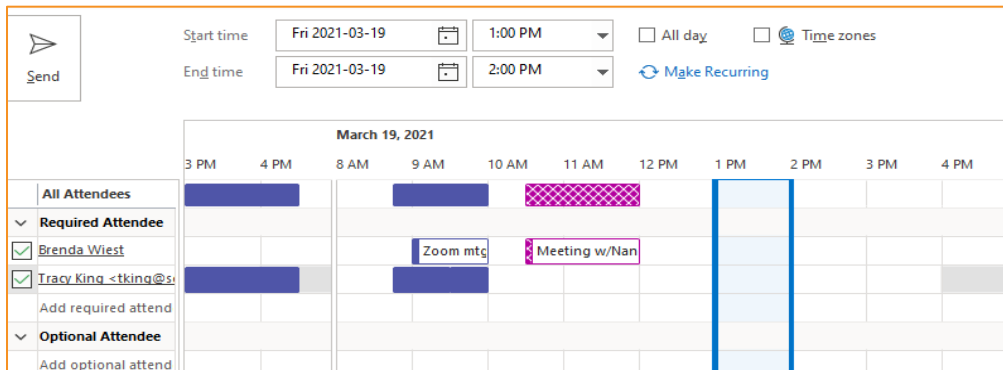
Scheduling Assistant

1. On the Home tab, left click on *New Meeting* (far, left on Ribbon).
2. Enter the *Title* of the meeting.
3. Select the *Start date and time* and the *End date and time*.
4. Left click on the *Scheduling Assistant* tab. The *Appointment* screen that appears shows the date and time you are suggesting for this meeting and your meetings/events already scheduled.
5. You can add the email address of anyone who is a *Required Attendee* by either clicking into the field *Add required attendee* (left side of screen) and selecting their name/email from the list that appears or by typing in their email address. You can also left click on *Add Attendees* (on the Ribbon) to add the attendees from your Address Book.

Note: If the Ribbon for the *Scheduling Assistant* is not visible, left click on *Scheduling Assistant* again.



6. Times that your attendees are busy are shown in dark blue. Times that your attendees have a tentative appointment are shown in a light blue hashed block, and times outside of your attendees' working hours are shown in light gray. Select an available time for all the attendees.



7. The time of your meeting can be adjusted by either entering a new time period using the *Start time and End time* fields at the top of the screen or by putting your mouse on the side of the outlined time frame on your schedule, holding down the left mouse button and dragging it to the new time slot.

8. Because it is difficult to schedule meeting when everyone is available, *AutoPick* (left side of *Scheduling Assistant* Ribbon) will show the dates and times that will work for the invitees according to their schedule.

9. Once the information is complete, left click on *Send* (top, left side of the screen) or left click on the *Meeting* tab (top, left side of screen) to input additional information into the meeting screen before sending it to the recipients.

