Outlook 2011 for Mac

Contents
Outlook – Getting Started ............................................................................................................................. 2
Email Basics in Outlook 2011 .......................................................................................................................... 3
   Using Outlook 2011 to read and organize mail ......................................................................................... 4
   Creating folders in Outlook 2011 ............................................................................................................... 5
   Conversation view in Outlook 2011 .......................................................................................................... 6
   Printing messages ..................................................................................................................................... 8
   Your Mailbox Quota .................................................................................................................................. 8
   Searching your mailbox ................................................................................................................................. 9
   Opening another person's mailbox .............................................................................................................. 9
   Set Calendar Premissons ............................................................................................................................. 11
   Sending as or on behalf of someone else ................................................................................................. 11
Calendar Basics in Outlook 2011 ................................................................................................................. 13
   Viewing your calendar ............................................................................................................................... 13
   Printing your itinerary ................................................................................................................................. 14
   Editing and canceling a meeting ............................................................................................................... 16
   Scheduling and changing a recurring meeting .......................................................................................... 18
   What happens when I accept meetings? .................................................................................................... 19
Managing Contacts in Outlook 2011 ........................................................................................................... 20
   Adding a new contact ............................................................................................................................... 20
   Adding a new personal distribution group ............................................................................................. 21
   Searching Contacts .................................................................................................................................. 22
Settings and Preferences in Outlook ........................................................................................................... 23
   Setting Time Zone ................................................................................................................................... 23
   Configuring Junk Mail Preferences ........................................................................................................... 23
   Configuring automated replies (Out of Office) ......................................................................................... 24
   Configuring Signatures ............................................................................................................................... 28
   Email rules in Outlook ............................................................................................................................... 29
      About Rules ......................................................................................................................................... 29
      Creating a rule to redirect inbound email ............................................................................................ 30
Outlook – Getting Started

Mac Office Outlook is a rich email client that allows you to access both your university email and calendar.

Default Mailbox View

Figure 1 – Default Mailbox View

1. Ribbon: Presents Outlook commands and functions.
2. New, Delete, Reply, Reply All, and Forward: Perform basic E-mail tasks such as: New E-mail, send a reply and delete a message. You can also reply with Meeting Request and Send an Attachment.
3. Additional E-mail Options: Use these buttons to perform advanced functions such as: Move to Folder, Create E-mail rule, Mark as Junk, Mark as Read or Unread, Color Categorize and Flag for Follow Up.
4. Search Box: Search within selected folder in Navigation Pane.
5. Contact Search: Allows you to search your personal contacts list or the Exchange Global Address list (directory).
6. Preview Button: Allows you to preview a message attachment (opens in a new window).
7. Navigation Pane: Contains items based upon the currently selected view.
8. Message List Pane: Displays a list of all E-mail messages contained in the folder selected in the Navigation Pane.
9. Reading Pane: View the body of your email
10. Views: Switch between Mail, Calendar, Contacts, and Tasks modes and views.
11. E-Mail View Options: You can Print the message or Undo any actions.
13. Message Organization: You can categorize your messages here, also flag for follow up, create e-mail rules and move messages to different folders
14. Up/Down: Moves you to the next or previous message, reminders and organizing messages into one or more categories.
15. Attachments: You can right click to save your attachments, double click to open it or click the Preview button to display it within Outlook.
Figure 2 – Message View

This is my new puppy!
Email Basics in Outlook 2011
Outlook 2011 allows you to access your university email and calendar from a Macintosh computer that has Internet access. With the move to on-campus Exchange Server 2010, Outlook 2011 offers the most features for the new environment.

Using Outlook 2011 to read and organize mail
Once Outlook 2011 has been configured there is a tree pane of icons for mail, calendar, contacts, tasks, and public folders that you can use to switch among the views. As part of the migration to the new campus-based email platform, UITS has also configured all users for Lync, Microsoft’s presence and instant messaging program.

By default, the reading pane will display the contents of the selected message. To select a message, just click on it. You may also double-click the message to open it in a separate window. When opened in a separate window, Outlook 2011 displays additional actions that can be taken on a message, such as replying by chat, flagging the message, categorizing the message, printing, moving, or deleting. From the reading pane, you can reply, reply-all, or forward a message.

Attachments in Outlook are identified by the paper-clip icon displayed on the right side of the message in the list view. The attachment cannot be opened directly from the list view. To download or open an attachment, you must first open the message by double-clicking on it, or using the hyperlinks in the Outlook preview pane.

![Attachments and other indicators in list view](image)

The message will open and display an additional line in the salutation section of the message called **Attachments** and each attachment will be displayed as a hyperlink. For some types of attachments, you can click directly on the link and open the attachment. Other attachment types must first be saved to your computer before you can open them. To save the attachment directly, right-click the attachment name and choose **Save Target as...** from the context menu.
Creating folders in Outlook 2011

Outlook 2011 uses five primary folders that exist in every mailbox to organize mail: Inbox, Sent Items, Deleted Items, Drafts, and Junk E-mail. Sometimes users like to store information more hierarchically and for that reason, you might want to create different folder structures. While you cannot remove any of the default folders, you can put sub-folders beneath them or build new top-level folders at the mailbox level (making them peers to the inbox). To create a new folder:

1. Select the folder where you want to create the folder. Note that the new folder will be created UNDER the folder you select. If you want your folder to be a peer of the inbox, you must select the mailbox (your name) folder, also known as the top-level folder.
2. Control click on that folder and choose New Folder...
3. Type a name for the folder in the box, and then press Enter.
Your new folder is now visible.

**Conversation view in Outlook 2011**

By default, Outlook 2011 uses Conversation View in all email folders whenever the Reading Pane is turned on. Conversation view displays every message in a conversation in a single view, including messages that are part of the conversation, but reside in folders other than the inbox. The Outlook view that accustomed to is called "arrange by date received." This will remove the conversation view and put each message on its own line in the inbox.
Conversation view is new to Exchange 2010 and Outlook 2011. It is turned on by default and is also available in Outlook Web Application (OWA). Microsoft's primary goal behind introducing conversation view was to reduce inbox overload. The theory was that when email was grouped by conversation, it provided users with more conversation context and less randomization than the traditional sort-by-receive-date format. When you select and expand a conversation, you can see at a glance:

- The most recent response in the conversation (when viewing on reading pane sort order)
- The messages in the conversation that are already deleted (shown in strike-thru font) or moved (via inbox rules) to another folder.
- The relationships among responses; who responded to which message (when viewing by conversation tree)

To assign a category to an email message

1. Make sure the email is open (categories are not accessible in the reading pane)
2. Click the category button next to the flag button
3. Select the category you wish to assign to this email
You can select as many categories as are appropriate.

Figure 6 - Assigning categories

Printing messages

Figure 7 - Printing

You can print messages that are opened in their own window by clicking the printer button on the message toolbar. You can also print messages directly from the preview pane in the inbox view.

To print an email:
1. Make sure the email is open
2. Click on the Print icon in the options area at the top of the email. This will open the Print window.
3. Select the printer you want to use
4. Click the Print button.

Your Mailbox Quota
Currently, all email accounts have a quota limit of 10GB of storage on the email server. Once you reach 9.77 GB, you will start to receive notifications that your mailbox is over the limit. This is your opportunity
to begin removing old or otherwise unwanted/unnecessary items from your mailbox. At 10 GB, you will not be able to send messages until your mailbox is cleaned out. At 10.2 GB, your mailbox will start rejecting new messages as well as prohibiting you from sending it.

**Searching your mailbox**
As the size of your mailbox and quantity of messages grow, it can become a daunting task to remember where you’ve put everything. And sometimes, you may simply forget to follow your own rules about how messages are organized. One feature that the Exchange team has spent several years developing is the search mailbox feature. Your mailbox is searched two ways: (1) server side search and (2) client side search.

To perform an entire Outlook mailbox search, select **Search** then **All Mail**. You can enter any text into the search box, including advanced query syntax. All messages that match the sender, subject, body or other relevant parameters will be returned and sorted, by default, by the date received. You can click the **Arrange by Date** dropdown arrow and choose another field by which to arrange the results. If you want to change your search result sort from descending to ascending order, click the **Newest on Top** to change it to **Oldest on Top**.

![Figure 8 - Advanced inbox search input screen](image)

Sometimes, you'll want a little more precision in your result set. By clicking **Advanced**, you'll expand some additional options. For example, you can choose to only search certain fields for your query. You can also filter results by returning only those from specific senders or sent to specific recipients. If you categorize your mail, you can further filter by specific categories.

![Figure 9 - Selecting search scope](image)

Sometimes, you'll want to search only a specific folder or other subset of your mailbox. You can narrow your results by selecting Subfolders.

**Opening another person's mailbox**
If you have been granted access to another user's mailbox, you can open it from Outlook. This is most common for people sharing calendar details with their team mates, but could apply to any folder in the

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mailbox. To open another users mailbox, while Outlook is open select file open Other User's Folder then enter their name.

For most users, calendar sharing is more common than mailbox sharing. You might share your calendar details with team mates so that they can see specific appointments and meetings you're attending, as opposed to just the free-busy time which only shows vague availability information.

**Opening another's calendar**

1. Switch to the calendar view in Outlook
2. Select Open Calendar
3. Then choose Calendar from the drop down
4. Enter the name of the person whose calendar you wish to view. If you have permissions, that person's calendar will be displayed side-by-side with your own.

Once the calendar is added, it is retained in a list on the tree pane and you can simply check the boxes for any of your previously added colleagues. You can display several calendars at once, provided your monitor supports it and you're willing to forgo details as the number of simultaneously displayed calendars increases. This feature is generally not used for purposes of scheduling meetings. It is intended to allow colleagues view details, when appropriate, to help them better communicate and minimize disruption.
Set Calendar Permissions

Figure 11 – Setting Calendar Permissions

You can also set permissions for others who want to view your calendar.

To share your calendar:
1. From the calendar view, click the Permissions button.
2. Choose Share This Calendar from the drop down menu. This page allows you to set permissions for that particular calendar.
3. Select Add User and enter the user you would like to give permissions to.
4. Select the Full Details radio button.

Sending as or on behalf of someone else
This configuration is common among people who delegate management of their inbox to others. In most cases, this may not apply to you. Many people confuse the ability to send as another person with the ability to send on their behalf. When you send as someone, you have essentially been entrusted to speak for that person. Mail messages that you initiate or reply to will appear to come from the person you’re sending as. Recipients have no way of knowing that you are replying on someone else’s behalf.

When you send on behalf of someone else, you’ve been granted to right to reply to messages or create messages that appear to originate from that sender when the message arrives (notifications) and while
viewing the item in list view. However, when recipients open the message, they will be able to see that you are acting on behalf of someone else by looking at the from field.

Typically, only one or the other permission is granted on a mailbox to an individual. You must create a service request to grant someone either send as or send on behalf permission to your mailbox or to be granted either send as or send on behalf access to someone else’s. You cannot establish send-as or send-on-behalf permissions yourself.

![Figure 12 – Selecting Email Account and Setting Bcc fields by default](image)

Once the permission has been granted, however, sending as or on behalf is as simple as changing the from field on a message. By default, the Bcc field is not visible in Outlook. To make it visible, select E-mail -> Options -> then select Bcc. You may wish to BCC yourself when sending as or on behalf of someone else. Once the from field is made visible, you’ll be able to substitute your name for the name you want the mail to appear to come from. Depending on the permissions granted, your message will either be sent as the other person or will appear to be sent on behalf of that person.


**Calendar Basics in Outlook 2011**

This chapter covers the basics associated with viewing your calendar, printing your schedule, and scheduling appointments, meetings, and recurring meetings with others.

**Viewing your calendar**

Outlook 2011 calendar allows users to view appointments and meetings that involve other users. You also have several different views of your calendar available. You can select the view most relevant to you by choosing the appropriate button from the calendar page toolbar.

![Figure 13 - Changing calendar views](image_url)

- To view only one day at a time, click the **Day** view button.
- If your calendar is on a different day and you want to see today's calendar, click the **Go to Today** button.
- To view the work week, click the **Work Week** view button. This will display a five day view. By default, Saturday and Sunday will not be displayed.
- The full week (7 day) view shows appointments on Saturday and Sunday as well.
- The month view gives you a month-at-a-glance view of your calendar. Individual appointment items are displayed and stacked within the box on the day they are scheduled, but no detailed information is generally available.

The **Reading Pane** displays specific information about a meeting on your calendar. This option is available for all views except **Month** view. You can also double-click the individual appointments to see their details.

*To turn the reading pane on or off:*

When the Reading Pane is on, information about the meeting is displayed.
1. Click the **View** drop-down list.
2. Click the **Right** list item to turn the reading pane on, Click the **Hidden** list item to turn the reading pane off.

**Printing your itinerary**

When you change your view from mail (inbox) to calendar, the toolbars at the top of the page change to reflect common tasks associated with scheduling and calendars. On the right side of the calendar toolbar is a printer button, which is actually a calendar printing wizard.

![Print button in calendar view](image1)

No matter which calendar view is currently open, clicking the **Print this calendar** button will open the calendar print wizard. The print window will pop up, allowing you to choose the **Day**, **Week** or **Month** views, each of which uses a format optimized to balance calendar details against the time interval.

![Print calendar wizard](image2)

With the **Day View** option you have the following additional print options to select from:
- **Print from**: a time range, which defaults to your pre-set default working hours.
• **Print detailed agenda along with calendar** - This provides the graphical calendar view as well as any notes, agendas, or other information in the body of each calendar item.

• **Print narrower calendar to leave room for notes** - as it implies, this prints the same information, but shrinks the page output size to allow room for notes.

The last step is to click **Print**. This will open the **Print** dialog box where you select your printer and preferences.

What is the difference between an Appointment and a Meeting? You create an Appointment for a Calendar item that involves only you. You create a Meeting for a Calendar item that involves you and other people. An appointment is just like a meeting, except you do not invite attendees. You can add appointments to your calendar to schedule work duties, events, or reminders. You can also convert any appointment to a meeting by clicking the Invite Attendees button on the appointment's toolbar.

**Creating an appointment or meeting request in Outlook**

1. Click the **New** button from the Outlook calendar toolbar
2. Select **Appointment** or **Meeting Request**.
   From there, a new window will open where you can enter appointment or meeting details.

3. In the **Subject** field type in the title of the appointment. If this is a meeting request, try to be descriptive enough so that the recipients understand the meeting's purpose at a glance.

4. Next, type in the location at the **Location** field. The location should correspond to a building name and room number if on campus or a physical address otherwise. When using a physical address, separate the street, city, and state with commas. By having a single line address, uses can quickly copy and paste the location into a search engine or mapping tool.

5. Select the appropriate **date** and **time**.
   a. Click the calendar icon to the right of the date boxes to pull up a calendar.
   b. Select a date. Click the arrows on the right of the time boxes for a dropdown menu of times to choose from.
6. If you wish your reminder time to be something other than the default (15 minutes), click the drop down arrow on the right of the Reminder box to choose what time increment you want for your reminder pop-ups. You can uncheck the Reminder box if you wish to not receive any reminders.

**NOTE:** If you're inviting guests to your meeting, consider their needs as well. If 30 minutes of travel time is necessary, perhaps a 45 minute reminder is more appropriate than 15.

7. In the Status: list, select how you want your schedule to appear for the duration of the appointment. Your selection (Busy, Free, Tentative, or Out of Office) is what others will see when they view your schedule. If you meeting is simply a reminder (this is particularly common with all day events), be sure to set the Status to free. This provides you with the reminder you need without blocking out your calendar to others whom might want to meet with you.

8. If you want to prevent other people from viewing the details of the appointment, check the Private box. This is common for doctor appointments, etc. Other people in your organization will see that you're not available, but, even those who have full calendar access will only see that you have a private appointment.

9. In the text field below, type any additional information related to the appointment. It is best practice to use this space to clearly lay out the meeting’s agenda.

10. Click the Save and Close link in the upper left corner.

11. If you're sending the appointment to others, click Send.

![Image of appointment creation interface](image.png)

**Figure 17 - Creating an appointment**

**Editing and canceling a meeting**

*Speaker Notes: draw attention to the flowchart that describes what happens when a user edits an appointment or a meeting versus a series or an instance within the series.*
Figure 18 - Processing Calendar Changes in OWA

OWA and Microsoft Outlook behave identically regarding how changes to meetings are processed. If you make changes to an appointment, and save the appointment, those changes will be reflected on your calendar. If you changed the start time or duration of an appointment, OWA will automatically adjust the location of the appointment on your calendar. If you change a meeting, both clients will recognize that updates should be sent out to recipients after being updated on the organizer's calendar.

When you need to cancel a meeting or appointment, you can delete the appointment from either the calendar view or by clicking the "X" button in the opened item. If the item is an appointment, you'll be asked to confirm your decision to delete it and if you do, it will be removed from your calendar. If you
delete a meeting request, you’ll be asked whether you want to send out a cancellation request. There are a few things you’ll want to consider when deleting meetings:

- If you want to remove the meeting request from your calendar, but keep the meeting on the other participants’ calendars, choose **No** (do not send out a cancellation notice). Typically this is done when the organizer has to delegate the meeting chair responsibilities to someone else because of schedule conflicts.
- If you want to cancel the meeting for all involved, choose **Yes** (send the cancellation notice).
- If you are working with a series, pay attention to whether you’re cancelling a single instance or the whole series.

### Scheduling and changing a recurring meeting

A recurring meeting is one that happens with a consistent frequency: 10:00 every Monday, 2:30 PM on the first Tuesday of each month, etc. Outlook and OWA allow you to create recurring appointments and meetings. Each recurring meeting that you create actually creates multiple objects in the system. A series collection is created that represents the **standard** appointment. Each instance in the series, however, is also its own separate object. This is done to facilitate schedule changes that require, for example, next week’s meeting to be held at 2:00 instead of 1:00, but the **standard meeting time (series) remains at 1:00**.

Scheduling and recurring meetings were actually quite complex before technology entered the picture (and when we all had considerably fewer meetings). Consider the following scenario:

Alice schedules a project meeting with Bob to occur every Monday at 9:00 AM. The series is scheduled to end with the project, after 26 weeks. By Friday, Alice realizes Week 2’s meeting must be changed to 3:00 PM. She opens the instance and changes the start time to 3:00 PM. This only changes one instance. The other 24 instances will still occur at 9:00 AM. On Friday of Week 10, Alice’s new boss schedules a recurring 9:00 Monday meeting with her. Starting on week 11, she needs to update the entire series to Monday at 1:00 PM. In this case, she’ll open the series and make the change. All individual instances will be moved to the new time, except the Week 2 meeting, which will stay at 3:00.

Week 2’s meeting was an exception to the series. When the series is changed, any existing exceptions are left alone. This behavior is by-design in Exchange, Outlook and OWA, but can often confuse end users. For this reason, Microsoft provides the following guidance for all users to follow when creating recurring meeting requests.

- Always put an end-date or limit the number of occurrences for the series. No meetings go on forever. Best practice is to set up recurring meetings according to the calendar year or the school year. Example: this meeting will happen every Friday at 11:00 AM from August 1, 2012 to July 31, 2013.
- If you find yourself changing the meeting time every week because of schedule conflicts, it might be necessary to open and change the entire series. The sooner you recognize and act on this, the better.
- After making a change to the series, look forward a few months to ensure that all instances of the meeting are scheduled for the right time. You may need to do some cleanup if an exception already exists and wasn’t updated with the series.
This allows you, as the meeting or appointment owner, to distinguish between changing an individual meeting ("I need to change next Monday's meeting to 11:00") and the entire series ("10:00 is no longer working for the group, the regular meeting time is changing to 1:00 PM"). The rules that OWA, Outlook, and Exchange apply to recurring meeting series, individual instances, and changes are complicated. But they still follow the same basic principles as depicted in Figure 20. In most cases, it is imperative that you, as the meeting/appointment organizer, validate that your intentions are reflected in your calendar.

**What happens when I accept meetings?**

When you accept a meeting or a recurring meeting, you are given the choice to respond with **Accept**, **Tentative**, or **Decline**. By default, every meeting request that you receive will show up as **Tentative** on your calendar. This happens on the server side and is by-design to accommodate a few common calendaring scenarios:

1. **Delegates.** Early versions of Exchange and Outlook had problems when mailbox owners and their delegates would process meeting requests at the same time. In many cases, these sync errors resulted in missed appointments or showing up to the wrong appointment.
2. **Inbox rules can be very useful for redirecting messages sent by several members of a large distribution list (DL). However, occasionally meeting requests are sent to those DLs and the rules process these requests as mail messages. That occasionally resulted in people missing meetings because they didn't look in the folder containing the meeting request until after the meeting was over.**

By setting all meeting requests to tentative upon receipt, this ensures that any reminders associated with the meeting will fire. It also allows users viewing their daily calendar to see appointments they were invited to, but not explicitly named (typically, they're part of a group that was invited as a group).

When you respond to a meeting request, you have three options: **Send Response Now, Edit Response Before Sending**, or **Do Not Send a Response**. Each organization has differing cultural rules about what type of response is appropriate. If you were named on the original meeting request (either explicitly or as a member of a distribution list), and the organizer updates the meeting, you will receive an update regardless of how you responded to the original meeting request. However, if you received the meeting request from someone other than the organizer (this typically happens because someone has forwarded the meeting request to you), you should always send a response. If you do not send a response, and the organizer changes the meeting, you will not receive an updated (unless the update is forwarded to you as well).²

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² By default, when someone other than the meeting organizer forwards a meeting request to a new recipient, the Exchange Server on the backend detects this and sends an informational message to the organizer stating that their meeting request has been forwarded.
Managing Contacts in Outlook 2011

You can access your contact list in Outlook by clicking on the contact view icon in the lower left corner of the Outlook screen. Outlook allows the user to sort by a variety of options with ascending or descending order.

Adding a new contact

Contacts can be added by clicking the Contact button on the contact toolbar. If you click the New button, you will receive a dropdown list of objects to create:

- New Contact - Brings up a form to create a new contact.
- New Group - Brings up a form to create a personal distribution group.
There is no minimum information set required to create a contact. A contact can be just a single phone number, just a name, just an email address, etc. But at least one field must be filled out. How you fill out each field is a personal matter, as contacts are not shared outside of your mailbox (unless you grant others permission).

**Adding a new personal distribution group**

As mentioned above, personal distribution groups (sometimes known as distribution lists) can be used to send mail to multiple recipients at once. Although it works the same as a global distribution group, personal distribution groups do not show up in the Global Address List and cannot be used by other users. They are typically used for aggregating external contacts. When you add a new group, you must give it a name and populate it with at least one member.

![Figure 21 - Adding users to a personal distribution group](image)
Members can be added two ways: (1) type the email address (or type their name and use ambiguous name resolution) and click **Add to Group** or (2) click on the **Members** button to bring up the search dialog box.

The quickest way to populate the distribution group is to type membership information directly. If you type members from your contact list, Outlook will automatically complete the contact. Once you see the contact you're seeking, you can click their name or press the [Tab] button to auto-complete the entry. The search dialog box allows you to search for your contacts using either the global address list or your contacts folders.

**Searching Contacts**

![Contact search screen & Contact options](image)

Searching for contacts is built into Outlook and located at the top of the list-view pane. To find a contact, simply enter any part of their name or email address into the search bar and click the search button (or hit enter). Outlook has a variety of options to filter the search results. Right-clicking any of the contacts in the results will bring up its own context menu shown above.
Settings and Preferences in Outlook
Preferences can be accessed by selecting Outlook -> Preferences in the left hand corner of the screen while Outlook is open and is your active application.

Setting Time Zone
To change your Outlook time zone:
1. Select Outlook from the upper left corner
2. Select Preferences
3. Select Calendar
4. Select the appropriate time zone from the Time Zones area
5. Close the window to save.

Configuring Junk Mail Preferences
You can configure spam control in Outlook using the Junk E-mail Protection pane in Outlook Mail Home menu.

Every mailbox has a folder called Junk E-mail into which all items believed to be spam are moved. You can check this filter from Outlook and should occasionally do so as sometimes valid mail is marked as
spam. In most cases, you can manage your spam settings without ever going into the options screen. For example:

1. If you receive mail that should be treated as junk mail, right click the message and choose **Junk Mail -> Mark as Junk** from the context menu.
2. If your messages from valid users are ending up in the junk email folder, you can right click the message and choose **Junk Mail -> Mark as Not Junk** from the context menu.

![Junk mail configuration screen](image)

Under **Junk E-mail Protection** there is a **Safe Domains** list that you can set as emails that will never enter the Junk mail. **Blocked Senders** are emails which will also go to the Junk mail folder.

**Configuring automated replies (Out of Office)**

![Out of Office](image)

Automatic replies, also known as Out-of-Office replies, are used to tell others when you are unavailable or out of the office for a specific period of time, such as vacations. The automatic reply feature allows separate auto-replies to be sent to senders both inside the organization and outside. You can choose to
send all users the same automated reply, or have different replies for external contacts (such as customers, students, etc.). You can also set up automated replies to only trigger between two distinct dates, so you don’t have to remember to set your auto-replies as the last thing before leaving the office prior to leaving for vacation. Setting up your automated replies is easy:

1. From the main Mail list view, click on Tools in the upper left hand corner.
2. Select Out of Office.

![Figure 25 - Options menu](image)

This will take you to the Organize E-Mail option and the Automatic Replies tab.

From the Automatic Replies tab:

3. Back at the Out of Office Assistant tab select the Send Out of Office option.
4. Next enter the message you want sent out.
5. Select the check box I am out of the office between option. If you want your automatic replies to be sent indefinitely, you may clear this checkbox.
Figure 26 - Sending automatic replies

6. The **Start date** and **End date** are set to an automatic default date (today's current date). To make changes to the date and time, select from the appropriate dropdown. The date field uses the standard calendar style dropdown and the time field allows 30 minute increments.

7. Below the date and time dropdowns is a rich-text editor titled "**Reply once to each sender outside my company with**" You may edit the contents of your INTERNAL message here.

   NOTE: Many people choose to NOT send automated replies to people outside their organization for security reasons.

8. If you want to send automated messages outside the organization, you must check the "**Send replies outside my company to:**" checkbox. This gives you two options:
   a. Send replies only to senders in my Address Book contacts list. This ensures that only people you know and have stored in your contact list will receive external replies.
   b. Send replies to all external senders. This sends replies to all users, even those you don’t know. It is possible that these replies would be sent to spammers if their messages were to hit the inbox (not get filtered out along the way).
9. Finally, compose the message you’d like to send to external users (vendors, customers, students, etc.). For example, a reply message to senders outside your organization may provide an alternative contact name and phone number to handle email inquiries while you are away, or you may want to let senders know whether you will be checking email periodically or not at all during your time out of the office. You can copy the internal message and paste it here or have two different messages, each appropriate for the audience.

10. Click **OK** to save your settings to the Exchange Server.

Even after your automated reply period is over, the Exchange Server retains your automated replies on the server which will be available in Outlook. The next time you need to set your automated replies, you need only change the dates and tweak the message a little bit.

**NOTE:** If you need to stop automated replies prematurely (early return from vacation, etc.), you can simply change the radio option button back to "**Do not send Out of Office messages**" at the top of the settings window. This turns them off immediately.
Configuring Signatures

Microsoft Exchange Server allows for three primary types of clients: the full client (Outlook), the mobile client (Android, iPhone, Windows Phone), and the web client (OWA). In each of these clients, you can configure a custom signature. The signature is automatically appended to your email messages every time you compose a new message or reply to a message.

NOTE: If you configure an auto signature for OWA, it will not automatically transfer to the Outlook client. You'll need to set up the Outlook auto signature separately.

To create or change your email signature in OWA

1. Navigate to the Outlook->Preferences pane in Outlook.
2. Select Signatures which brings up the windows above.
3. Default lets you select which signature is the default for the accounts configured in Outlook.
4. Click **OK** when done.

**TIP:** Some people maintain different signatures for different devices. In addition to contact information, these device-specific signatures can be used to notify recipients of your current status. For example, the fact that you’re responding from Outlook might send the message that you’re at your regular computer.

### Email rules in Outlook

Inbox rules are another feature in Exchange Server that helps users with mailbox management. Rules run on either the Exchange Server or the Outlook full client. Server-side rules are processed when the email message first hits the system. Client side rules (full Outlook) are only processed when the Outlook client is opened on a workstation. Typically, client side rules rely on features specific to the workstation. For example, you can create a rule to play a specific ring tone when mail comes in from your manager. Client side rules are out of scope for this training.

### About Rules

Rules created in Outlook can be client side or server side rules. As such, they will work with both the OWA client and full Outlook client. Rules consist of three components: triggers, actions and exceptions. A trigger is an event, such as:

- You receive mail from a certain person
- You receive mail that was sent to a distribution list that you subscribe to
- You receive flagged message (sensitivity, priority)
- You receive a message of a certain size

Exchange evaluates every message that enters your mailbox to determine whether it matches any of the triggers defined by any of your rules. It processes the rules sequentially, meaning that the first rule found to match will be processed. By default, only the first matching rule is processed against the message, but you can change that. This is generally not recommended unless you're dealing with extraordinary circumstances. Once the rule's trigger is recognized, your rule might take any of the following actions:

- Move it to an alternate folder in your mailbox
- Delete it
- Forward it to another person or another email account (such as your hotmail or gmail account)
- Reply to it (this often requires a client side rule and it out of scope for this training)
Finally, each rule allows for exceptions. If a message matches a trigger, it is then evaluated for whether it matches an exception. If it also matches the exception, the action is not taken and the message will continue being processed by additional rules. So it’s possible for your message to match two different rules, but because it is an exception to rule 1, it’s processed instead by rule 3. Consider the following scenario.

**Figure 30 - Rule processing example**

The message from your manager is received in the mailbox and undergoes rule processing. It matches the first rule, but your manager has sent it to everyone on your team, not just you. As such, the message is moved to a folder under your inbox that is reserved for manager communications. A second message from your manager is sent with specific instructions for you. It is sent only to you. The second message will be processed by the first rule, but because it also matches the exception, the first rule’s action will not be taken, and it will be processed by the second rule. The second message will stay in your inbox and will automatically have a "flag for follow-up" applied to it.

**TIP:** The most common mistake people make is confusing the sender and recipient of a message sent to a distribution list. One person (the sender) sends a message to many recipients (members of the distribution list). Many people configure the rule to match messages sent "from a distribution list" instead of messages sent "to a distribution list." The result of this misconfiguration is that all messages from any member of the DL sent to you (even those not sent to the distribution list) get processed by the rule. What most people are trying to do is store conversations sent to the distribution list in a specified folder so they can review at their leisure.

**Creating a rule to redirect inbound email**

1. To create a new rule in Outlook, select the **Rules** button from the Outlook menu when **Mail** is selected. Then select **Edit Rules** to bring up the rules windows. The example below will illustrate how to set up mailbox forwarding to an external email account:
2. From the Rules window, select the + to create a new rule which is shown below.

![Creating a new rule](image)

Figure 31 - Creating a new rule

3. **When a new message arrives** is where you would specify what type of messages you want this rule to impact.

4. **Do the following** is where you specify what happens to the message
   a. The dropdown allows for a variety of options but for this one example Forward To was selected.
   b. Enter the full email address of where you'd like the message forwarded to.

5. Clicking on the **Except if** button brings down another set of dropdown boxes that allow you to specify which emails this email will not affect.

6. You should also type a descriptive name for the rule in the **Rule name** text box.

7. Click **OK** to save your changes on the server. At this point all new messages will be subject to this rule.