

Section 9



Topics Covered

- Using the Out of Office Assistant..... 9-2
- Working offline..... 9-10



Time Required: 30 Mins



Using the Out of Office Assistant

The Out of Office Assistant can be used to handle your mail automatically when you're away from your office. You can add rules for the handling of incoming mail, and you can reply with a standard note to each user who mails you.

To Use the Out of Office Assistant

1. Select the **Tools, Out of Office Assistant** menu option.

Out of Office Assistant

I am currently In the Office

I am currently Out of the Office

AutoReply only once to each sender with the following text:

These rules will be applied to incoming messages while you are out of the office:

| Status | Conditions | Actions |
|--------|------------|---------|
|--------|------------|---------|

Move Up
Move Down

Add Rule... Edit Rule... Delete Rule Show rules for all profiles

OK Cancel Help

2. Select the **I am currently Out of the Office** radio button.
3. To reply to each person who sends you mail with a standard note, type the note into the **AutoReply...** list box.

Note: Each sender will receive the standard note only once, regardless of how many messages they send.

4. To add rules and actions to be applied while you're out of the office, click the **Add Rule** button. /..



Using the Out of Office Assistant

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The **Edit Rule** dialogue box will be displayed.

The top part of the dialogue box is used to specify the condition(s) you want to set.

5. In the text boxes in the top part of the box, enter the text that is to be found for the action to be performed. This may be a single user or a single word that's part of the message text. However, you can specify combinations of text to be found in each field.

For example, if you wanted all messages that mention **Budget Committee** in the subject field to be moved to a different folder, you would type *Budget Committee* into the **Subject** box; if you wanted all mail from a specific person to be forwarded to a colleague, you would enter the sender's name into the **From** box.

Note: If you want to find messages from more than one sender, separate the senders' names with a semicolon (;). To search for more than one word or phrase in the subject field or the message body, separate the words/phrases with a semicolon (;).

6. If necessary, choose the **Sent directly to me** option so that any messages addressed to you are selected for the specified action.
7. If necessary, choose the **Copied (Cc) to me** option. /..



Using the Out of Office Assistant

../ To Use the Out of Office Assistant

8. To specify further conditions, click the **Advanced** button.

Using these options you can set rules to select, for example, messages with a particular sensitivity or importance level, or those with attachments or that are a particular size.

Choose the required options then click **OK** to return to the **Edit Rule** dialogue box.

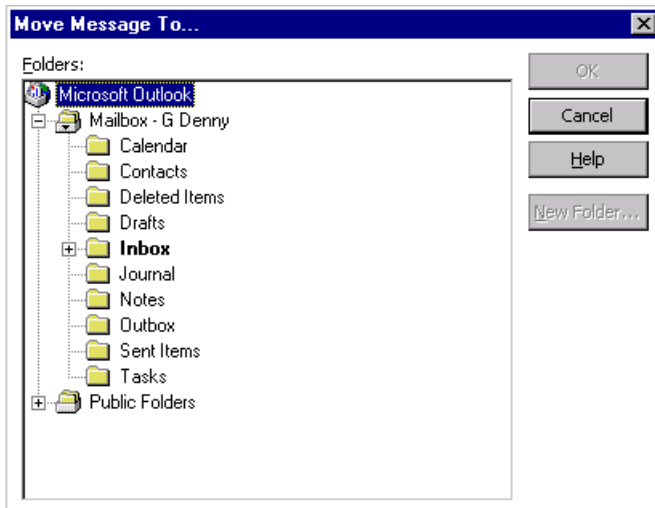
9. To stop processing the other rules after a message is found to satisfy one of them, choose the **Do not process subsequent rules** option.
10. In the bottom portion of the dialogue box, choose the action you want to perform on the selected messages:
 - **Alert:** Choose this option to specify that a sound or message is to be displayed when messages that satisfy your condition(s) are delivered. Click the **Action** button to display the **Alert Actions** dialogue box where you can choose the message or sound to be used. /..



Using the Out of Office Assistant

../ To Use the Out of Office Assistant

- **Delete:** Choose this option to delete any messages that satisfy your conditions. Deleted messages will be moved to your **Deleted Items** folder.
- **Move to:** If messages satisfying your conditions are to be filed in a folder other than **Inbox**, choose this option then specify the folder by clicking the **Folder** button...



...and choosing the required folder. Click **OK** to return to the **Edit Rule** dialogue box.

- **Copy to:** To place a copy of qualifying messages in both the **Inbox** and another folder, choose this option and select the required folder as explained above.
- **Forward:** If messages meeting the specified conditions are to be forwarded to another user, choose this option then either select or type the name of the other user in the text box.

From the **Method** drop-down list, choose the format for the forwarded message:

- **Standard:** The message will be forwarded in the usual fashion, with the **FW** prefix shown in the subject field.
- **Leave message intact:** Forwards the message as if it were a new message, without the **FW** prefix.
- **Insert message as an attachment:** Includes the message as an attachment in a new message.
- **Reply with:** To send a standard message in reply to the messages that satisfy your conditions, choose this option then click the **Template** button. A blank message is displayed. Type your reply and add any additional recipients then select the **File, Save & Close** command.
- **Custom:** If you want to carry out an action other than an Outlook action when a message satisfying the specified conditions is received, select the **Custom** option and choose the action from the drop-down list. /..



Using the Out of Office Assistant

../ To Use the Out of Office Assistant

11. When you've finished specifying rules and actions, click **OK** to return to the **Out of Office Assistant** dialogue box.
12. To add another rule, repeat steps **4** to **11**.
13. When you're finished using the Out of Office Assistant, click **OK** to close the dialogue box.

To Edit or Delete a Rule

When you have added rules they will be listed in the **Out of Office Assistant** dialogue box:

Out of Office Assistant

I am currently In the Office

I am currently Ot of the Office

AutoReply only once to each sender with the following text:

I'm currently out of the office but I'll be back tomorrow.

These rules will be applied to incoming messages while you are out of the office:

| Status | Conditions | Actions | |
|-------------------------------------|--------------------------|----------------------|----------------------|
| <input checked="" type="checkbox"/> | SUBJECT:Budget Committee | MOVE TO:Budget Co... | Move Up Move Down |
| <input checked="" type="checkbox"/> | Sent Directly to Me | FORWARD TO:D Eld... | |

Add Rule... Edit Rule... Delete Rule Show rules for all profiles

OK Cancel Help

You can use the **Edit Rule** and **Delete Rule** buttons in this dialogue box to change or delete rules you've already created.

To Suspend a Rule Temporarily

Although your rules will be needed most of the time, there may be occasions when you want to switch off a rule. For example, if you generally forward messages to an assistant and the assistant is on holiday, you may want to suspend that rule for a time. In the **Out of Office Assistant** dialogue box, click the **Status** box next to the rule to be suspended. The rule will then still exist but won't be processed until the status is returned to normal.

On Your Return

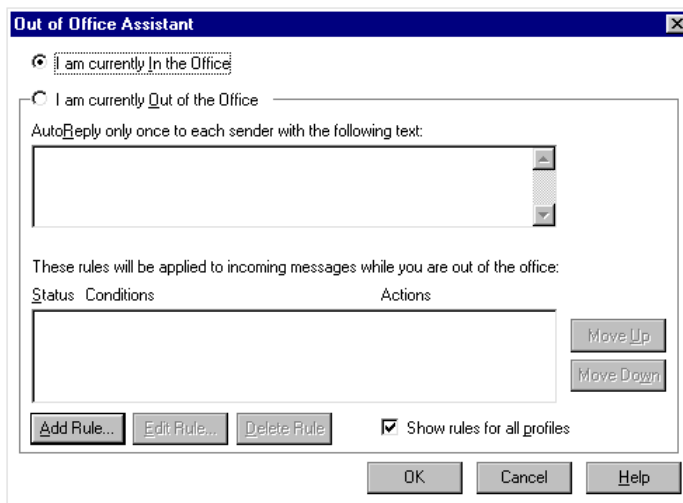
The next time you run Microsoft Outlook, you'll be reminded that these options are still set. To specify that you're now back in the office, select the **Tools, Out of Office Assistant** command and choose the **I am currently In the Office** radio button.



Exercise 9-1

In this exercise you'll use the Out Of Office Assistant.

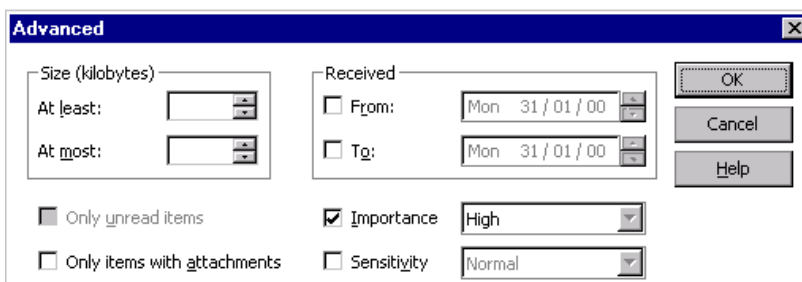
1. Follow the instructions below to set an AutoReply.
 - Select the **Tools, Out Of Office Assistant** command.The **Out Of Office Assistant** dialogue box is displayed.



- Select the **I am currently Out of the Office** radio button.
 - In the **AutoReply...** text box, type
Sorry, I'm not in the office today but I'll be back tomorrow. Meanwhile, if you have anything that can't wait, please get in touch with my assistant on 2541
 - Click **OK** to close the dialogue box.
2. Send yourself a message on any topic. When this message is received, Outlook will send a replay containing the text you set in the Out of Office assistant.

Any one sender will receive this AutoReply once only.

3. Following the instructions below, set a rule so that when a message marked **High importance** is received, it is forwarded to your assistant.
 - Select the **Tools, Out of Office Assistant** command then click the **Add Rule** button.
 - Click the **Advanced** button.
 - Activate the **Importance** check box and ensure **High** is shown in the text box.





Exercise 9-1

- Click **OK** to return to the **Edit Rule** dialogue box.
- As the message is to be forwarded to your assistant, click the **Forward** option and then either type the address of someone you're working with or, if you're working alone, enter your own address. (You could use the **To** button to display your address books and choose the required address from there.)

The screenshot shows the 'Edit Rule' dialog box with the following settings:

- Alert with Action...
- Delete
- Move to Folder... [text box]
- Copy to Folder... [text box]
- Forward To... [text box: D Elder] Method: Standard
- Reply with Template...
- Custom [dropdown] [text box]

- Click **OK** to return to the **Out of Office Assistant** dialogue box.

The screenshot shows the 'Out of Office Assistant' dialog box with the following settings:

- I am currently In the Office
- I am currently Out of the Office
- AutoReply only once to each sender with the following text:
[text box: I'm currently out of the office but I'll be back tomorrow. Meanwhile, if you have anything that can't wait, please get in touch with my assistant on extension 2541.]
- These rules will be applied to incoming messages while you are out of the office:

| Status | Conditions | Actions |
|-------------------------------------|-----------------|---------------------|
| <input checked="" type="checkbox"/> | IMPORTANCE:High | FORWARD TO:D Eld... |
- Show rules for all profiles

The rule you created is shown at the bottom of this dialogue box.

- Click **OK** to close it.



Exercise 9-1

5. Send yourself a message marked with **High Importance**.

If you elected to forward it to yourself, you will receive both the original and the forwarded message.

If you forwarded to someone else, you will receive the original and they will receive the forwarded version.

6. Select the **Tools, Out of Office Assistant** menu option then select the **I am currently In the Office** option button and click **OK**.

The rule you set will no longer be processed.



Working Offline

When you are unable to connect to your Microsoft Exchange server, perhaps when working at home, you have to work *offline*. As all the components of Outlook (other than personal folders you've created on your hard disk) are stored on the Exchange server, you have to prepare for working offline so that you have access to your mail folders.

If you have the facilities, you can then dial in from a remote location to make the connection with the Exchange server. Alternatively, you can synchronise the contents of your folders and send any messages you compose while offline next time you connect to the server.

Preparing to Work Offline

There are two steps to carry out when preparing for offline work:

- Install the Microsoft Outlook software on the computer to be used for offline working, including Exchange Server as a service in your profile and choosing to create an *offline folder file*.

HelpTip: If Outlook is already installed on this computer, you must create an offline folder file. For detailed help on how to do this, select the **Help, Microsoft Outlook Help** command and then type **offline folder** into the Office Assistant box. Choose the **create an offline folder file** help topic by clicking it.

- Connect to the network and instruct Outlook to make certain folders available for offline work. You have to do this only once for each folder.

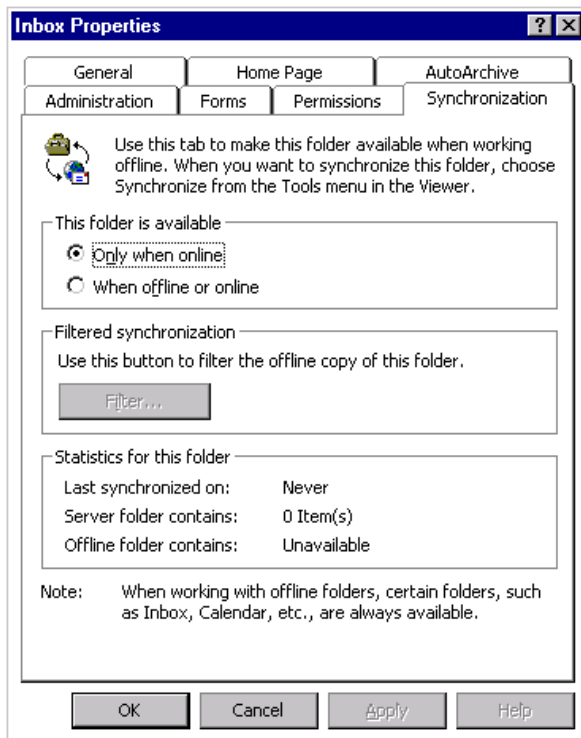
Replicas of these folders are placed on the computer to be used offline and these will be used to update your folders on the server when you reconnect to the server.



Working Offline

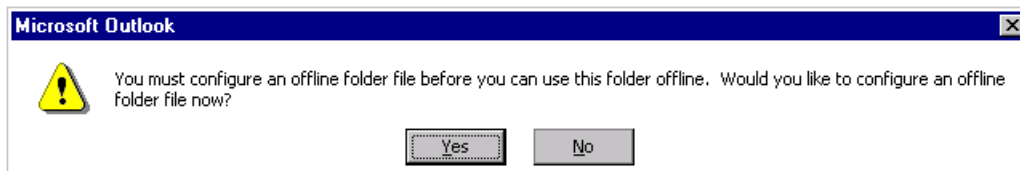
To Make a Folder Available for Offline Use

1. Right click the folder you want to make available.
2. Choose **Properties** from the shortcut menu and display the **Synchronization** property sheet.



3. Select the **When online or offline** option button.
4. Click **OK**.

The first time you make a folder available for offline use, you'll be prompted to create an offline folder file if one hasn't been created already: /..





Working Offline

../ To Make a Folder Available for Offline Use

5. Answer **Yes**. You'll then be asked for the name and path of your offline folder file.



6. Click **OK** to accept the defaults shown in this dialogue box, or type a new name and path then click **OK**.



7. Choose **Yes**.

You can now work with these folders even when not connected to the server.

Note: You can also download your Address Book to the computer you'll be using offline, using the **Tools, Synchronize, Download, Address Book** command.

Synchronising Your Offline Folders

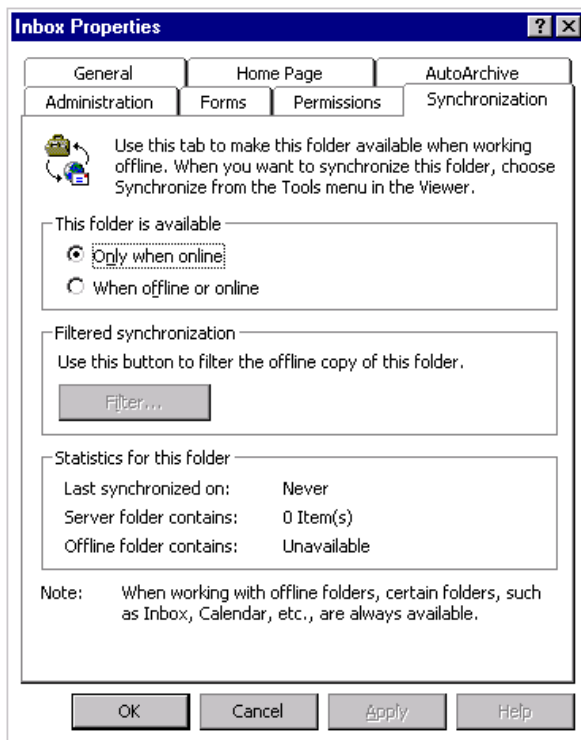
The tasks that you carry out offline will mean that the contents of your offline folders will no longer match those of your server folders. You may have mail in your **Outbox** folder, for example, or maybe you've changed the contents of your **Inbox**. Therefore, when you next connect to the server, your folders must be *synchronised* to bring those on the server into line. You can use the **Tools, Synchronize, This Folder** and **Tools, Synchronize, All Folders** commands to do this.



Exercise 9-2

In this exercise, you'll make your **Inbox**, **Tasks** and **Calendar** folders available for offline work.

1. If necessary, display your folders list.
2. Right click on the **Inbox** folder and choose **Properties** from the shortcut menu.
The properties relating to the **Inbox** folder are displayed.
3. Display the **Synchronization** tab in the **Properties** dialogue box.



4. Select the **When offline or online** option button.
5. Click **OK**.
6. If you are prompted to create an offline folder file, follow the instructions on the screen.
7. Repeat these steps to make the **Tasks** and **Calendar** folders available for offline work.



Questions and Answers

1. Which Outlook facility would you use to deal with mail that arrives while you are out of the office?

2. Which option in the **Edit Rule** dialogue box would you use to display text when messages matching the specified criteria are received?

3. Which button would you use if you wanted to remove an existing rule?

4. How would you suspend a rule set in the Out of Office Assistant?

5. What is the Out of Office Assistant used for?

6. When would you work with Outlook offline?

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