OUTLOOK 2007/2010 – TIPS FOR WORKING OPTIMALLY

INTRODUCTION

Microsoft Outlook is a powerful calendaring and scheduling tool. This document includes tips on working optimally in Outlook. For more information, see the Outlook 2007/10 – Calendar Best Practices, Do’s Don’ts and Tips found on the IT Training Guides website (www.csun.edu/it/training/guides) under Microsoft > Outlook.

ESSENTIALS WHEN USING OUTLOOK

1. Make a choice – When meeting requests show in your inbox, respond right away to the request by selecting: Accept, Tentative or Decline.

2. Process meeting requests in the order in which they come into the inbox (oldest first).

3. Process meeting requests and updates from the Inbox not the calendar.

4. After modifying a meeting request that you are the owner of, remember to click the Send Update button.

5. Cancelling a meeting? – Notify the people invited by deleting the single meeting from your calendar and select Send cancellation and delete meeting
   a. Cancel recurring meeting? - As the meeting organizer, end a recurring series by opening the meeting on your calendar, set a new end date and then send an update.
   b. Change meeting organizers – If a recurring meeting is changing organizers/owners, the original organizer must send an update with a new end date. The new organizer should send a new meeting invite for meetings in the future.
   c. Don’t move meeting requests from your inbox to a different folder before you have responded to the request.

6. Schedule end dates on recurring meetings - When scheduling recurring meetings, it is highly recommended that a definite end date be used. It is recommended to make the recurrence end date every 3 or 6 months.

7. Refresh Data - It is recommended from time to time or when you are seeing discrepancies, to refresh your Outlook windows. From the Send/Receive Tab, in the Send & Receive group, select Send Receive All Folders.
8. **Do not use Majordomo lists** when creating meeting invites (directions for alternatives available in the Outlook 2001/2010 – Calendar Best Practices, Do’s, Don’ts, and Tips document at [www.csun.edu/it/training/guides](http://www.csun.edu/it/training/guides) under the Microsoft category and Outlook Link).

9. Forwarded meetings can lead to inaccurate information in the calendar – the meeting organizer should not forward meeting requests.

10. **Use “Remove from Calendar”** instead of deleting meeting cancellation notices.

11. Personal notes are lost after a meeting update is received. – If you are an attendee of a meeting invite, any personal notes you may include in your calendar item will be lost if the meeting organizer sends and update to the meeting.

12. **Limit the number of delegates accessing your calendar** - To prevent incorrect or missing meeting information, it is recommended that you use minimal delegates with Editor permissions if not just one. Decide whether the delegate or the mailbox owner will process all the meeting requests.

13. **Be on the same application version** – You and your delegates should be on the same version of the application. If you use more than one computer (work vs. home) be sure both are using the same application version.

**NEED HELP?**

Contact the IT Help Center by phone (818-677-1400), online at ([http://techsupport.csun.edu](http://techsupport.csun.edu)) or in person in (Oviatt Library, Room 33).