

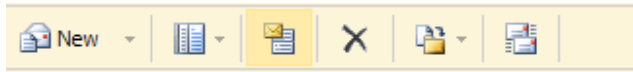
# Top Tips for Primary Email

Outlook Web-Access from Exchange 2007

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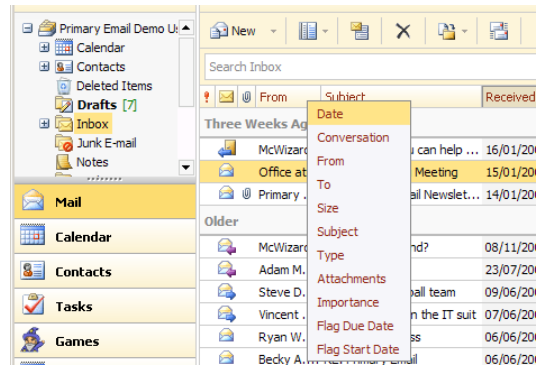
## Firstly,

This guide is intended for *Single-Line* view. To change views, click the various options in the New header.



Highlighted above is *Change View*). Click to switch between *single-line* and *multiple-line* views.

To add further columns to your list of emails, right-click on the top row of headers and select from the options (shown to the right).



## Let's Click

Primary Email provides right-click navigation and drag & drop functionality. Right click on emails, folders and calendar items to interact.

Turn the page for our Top Tips for Primary Email's Outlook Web Access 2007.

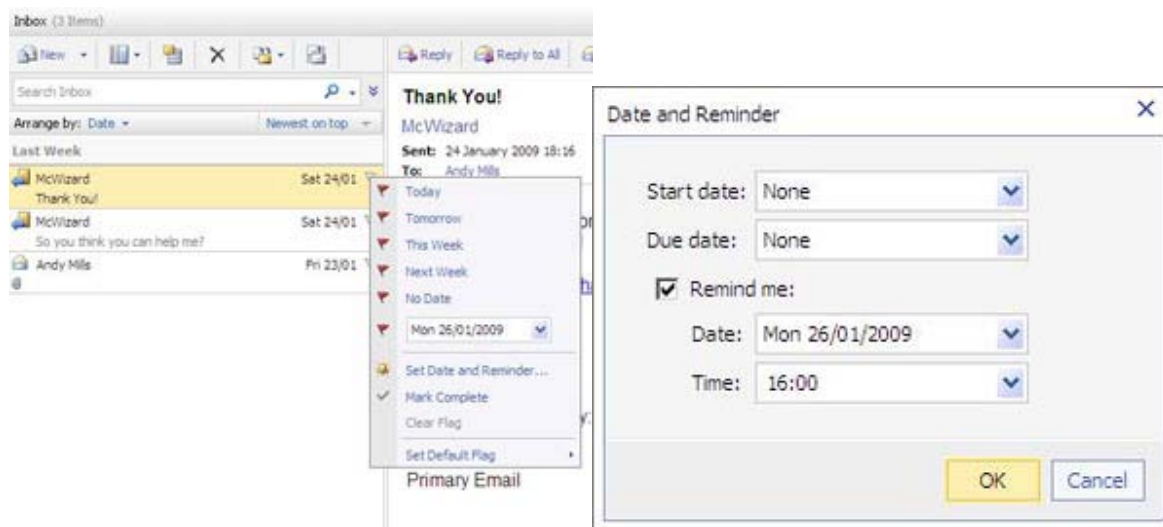
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


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## Tip 1 - Flag emails for follow-up

“Flagged” emails are automatically displayed in your **Tasks** tab. Set flags as reminders to take action on an email message.



1. To do this from:
  - your **Inbox**:  
Left-click once on the grey flag icon  to the right of the email message (it will turn red when a reminder is set)
  - an **open email**:  
Click on the red flag icon  in the toolbar displayed above your email
2. Set a due date for the email:
  - Without an automatic reminder:
    - a. Choose your **due by** time and date
  - With an automatic reminder:
    - a. Select the  **Set Date and Reminder...** option
    - b. Check the  **Remind me** box
    - c. Set the **Date** and **Time** for your reminder
    - d. Select **Ok**

### Removing or completing a flag


Once you have responded or completed the task related to the email message follow step 1. of the instructions above and select  **Mark Complete**.

### Quick flag and default flag settings

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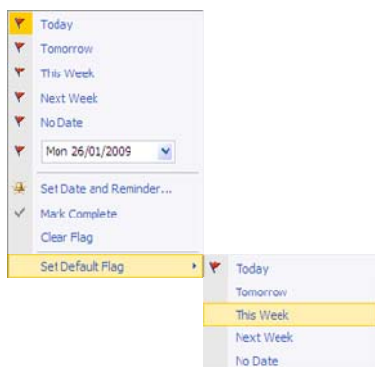
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If you left click on the grey flag icon  in your **inbox** it will mark the message as flagged using the default due date.

To change the default due date settings:

1. Follow step 1. of the instructions above
2. Select **Set Default Flag**
3. Select an due date option.

You can choose from **Today, Tomorrow, This Week, Next Week, No Date**.



Left clicking on a red flag icon  will change the flag to an action completed flag . Any further left clicks will toggle the flag between default due date and completed.

To remove a flag completely you must right click on the flag icon and select **Clear Flag**.



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## Tip 2 - Use the *Tasks* view





Check your priorities for the day by looking at your Task view. It automatically displays your flagged messages (follow-ups) and tasks in a simple list which you can manage and customise to suit you.

To view Tasks simply click on the  **Tasks** button in the main left hand menu. Completed tasks are greyed out with a strikethrough effect, and display a checked **Task Complete**  check box and **Complete**  flag icon. Overdue items are displayed in **red text**.

### Sorting your task list

To sort your tasks click on the appropriate column heading at the top of the task list.



Icon	Sorts By
	Task type Your flagged emails, flagged contacts, and to-do list tasks will be separated
<input checked="" type="checkbox"/> or <input type="checkbox"/>	Status Separates completed and outstanding tasks
	Priority Separated by low, normal, and high priority
	Attachment Emails and tasks with attachments are separated from those without
<b>Subject</b>	Subject Tasks are sorted alphabetically by subject title
<b>Due Date</b>	Date Due Sorted in date order
	Category Separated by category



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## Tip 3 - Use the Search Facility


### Searching inbox and tasks

1. You can search for specific tasks or emails using the **Search** bar. You need to enter the title of the task you are searching for in the **Search Tasks** text box
2. Click on the **Search**  button
3. Your results are displayed in the task list below. If you wish to view the full details or edit a task double click on the task in the results list.
4. To clear your search results and return to your main task list click on the **Clear Search Results**  button.

**Note:** To search for tasks in other folders use the options provided by clicking the **Search Location**  dropdown menu, or to search for tasks associated with a specific category click the **Advanced Search Options**  button and use the options provided.



### Manually adding a task ('to-do' item)



1. Enter the new task in the **Type a new task** box
2. (OPTIONAL) Select a due date from the drop down menu. The default option is **No due date**
3. Click the **Add new task**  button to add the task to your task list


### When you have completed a task

You can mark a task as complete by:

- Clicking **Mark Complete**  button on the tasks menu bar
- Checking the **Task Complete**  checkbox
- Clicking on the red flag icon 

### Removing a task

To delete a task from your task list:

1. Select the task you wish to delete
2. Then either:
  - Click the **Delete**  button on the tasks menu bar
  - OR
  - Press the **Delete** button on your keyboard
3. Your task have now been moved into the **Deleted Items** folder

**Note:** To recover a deleted task you must find it in the **Deleted Items** folder and move it back to the **Tasks** folder.

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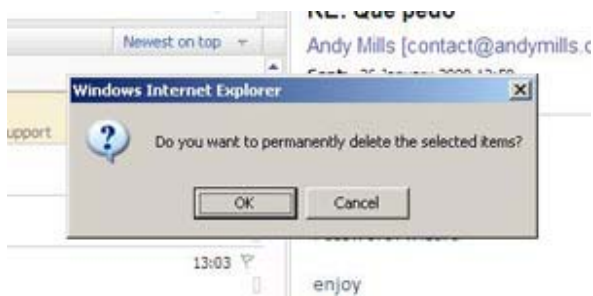
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## Tip 4 - Permanently delete messages

When you delete something, hold down the **shift-key** as you click **delete** and it's permanently deleted. You'll be asked to confirm that you want to permanently delete the message. You can select a multiple messages, or all the contents of a folder, using the same method.

**Note:** A permanently deleted message will not go into the **Deleted Items** folder- you will not be able to recover a message after you permanently deleted it.



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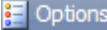


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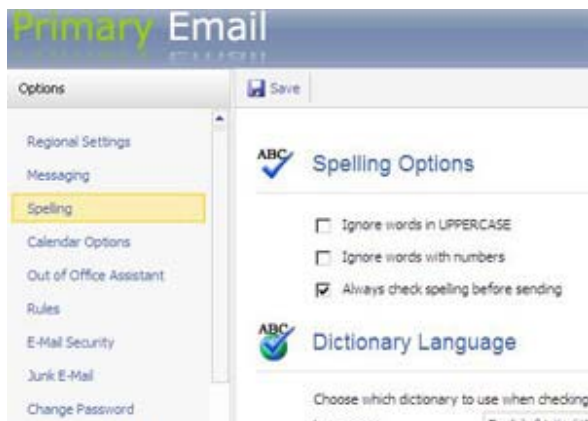
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## Tip 5 - Automatically catch spelling errors

You can set Primary Email to check the spelling automatically on all outgoing messages.

To set automatic spell checking:

1. Click  **Options** on the main Primary Email menu bar at the top of the page
2. Select **spelling** in the left hand menu
3. Check the  **Always check spelling before sending** box
4. Click the  **Save** button on the top menu bar
5. To return to your emails click on the  **Mail** button in the main left hand menu




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## Tip 6 - Quickly add a contact from an e-mail

You can easily keep your list of  **Contacts** current and complete.

To add a contact from an open email:

1. Right click on the person's name or email address (between the email subject and **Sent** fields)
2. Select **Add to Contacts...**
3. This opens a pop-up for a new **Contact** where you can optionally enter any other information you want for the **Contact**. When you have finished click the  **Save and Close** button to save to your  **Contacts** list
- 4.



**Note:** You may need to have pop-ups enabled within your browser to use this feature. If you are using Internet Explorer and you see a **"Pop-up blocked"** message at the top of your browser window:

- Click on the **"Pop-up Blocked"** message
- Select **Always Allow Pop-ups from This Site...**



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

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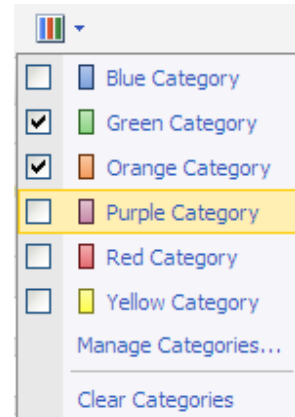
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## Tip 7 - Get organised and colour co-ordinated

You can add categories to mail messages, tasks, contacts and calendar items. You can also add and modify colour categories to give you a simple visual way to easily organise your data.

To add categories to an item:

1. Select the categories icon (there are two options for doing this with mail messages and task items)
  - for all items you can:
    - a. Double click on the item to open it for editing
    - b. Select the categories icon  in the toolbar displayed above the contact information
  - for **mail messages** and **tasks** you can also click the grey categories icon  to the right of the message/task listing
2. Check  the categories you want to associate with the item
3. (if the item was opened for editing you also need to click  **Save and Close** to close the edit window)



### Customising the categories

**Top Tip:** McWizard recommends you delete all of the existing default categories (i.e. Blue Category, Green Category etc.) and create new ones with personalised category names (e.g. Departmental Meetings, Parent's evening, Planning, Personal).

To delete existing categories

1. Follow step 1. of the instructions above and select **Manage Categories....**
2. Select **Delete Category...**
3. Click **Ok** and repeat steps 2 – 3 as required
4. Click **Ok** again

To add new categories:

1. Follow step 1. of the instructions above and select **Manage Categories....**
2. Select **Create New Category...**
3. Using the **Color** drop down menu select a colour for your new category
4. Type a name for the category in the **Category name** field
5. Click **Ok** and repeat steps 2 – 4 as required
6. Click **Ok** again

To change the colour of existing categories:

1. Follow step 1. of the instructions above and select **Manage Categories....**
2. Select **Change Category Color...**
3. Using the **Color** drop down menu select a new colour for the category
4. Click **Ok** and repeat steps 2 – 4 as required
5. Click **Ok** again

### Removing Categories

If you want to remove all categories associated with an item follow step 1. of the instructions above and select **Clear Categories**.

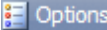

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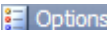

## Tip 8 - Out of office messages

You can set different **Out Of Office** messages for internal and external recipients.

1. Click  **Options** on the main Primary Email menu bar at the top of the page
2. Select **Out of Office Assistant** in the left hand menu
3. In the main window select the **Send Out of Office auto-replies** radio button
4. (OPTIONAL) If you want to set automatic dates to activate and deactivate your **Out of Office** message:
  - Check  **Send Out of Office auto-replies only during this time period**
  - Enter the automatic start and end dates and times
5. Edit your out of office reply
  - For students and staff at your school  
Type and format the reply you wish to automatically send in the text box titled **"Send an auto-reply once to each sender inside my organization with the following message:"**
  - (OPTIONAL) For people outside your school
    - a. Check  **Send Out of Office auto-replies to External Senders**
    - b. If you only want to send automatic replies to contacts stored in your address book select the **Send Out of Office auto-replies only to senders in my Contacts list** radio button  
OR  
If you want to send automatic replies to everyone who emails you select the **Send Out of Office auto-replies to anyone outside my organization** radio button
    - c. Type and format the reply you wish to automatically send in the text box titled **"Send an auto-reply once to each sender inside my organization with the following message:"**
6. Click the  **Save** button on the top menu bar



## To stop sending your out of office message

1. Click  **Options** on the main Primary Email menu bar at the top of the page
2. Select **Out of Office Assistant** in the left hand menu
3. In the main window select **Do not send Out of Office auto-replies**
4. Click the  **Save** button on the top menu bar


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## Tip 9 - Shared calendars

To open a shared calendar:

1. The Open Calendar field is located on the main Primary Email tool bar at the top of the page. Enter the username of the person whose calendar you want to see in the **Username...** box (A username is usually *firstname.surname*, for example *john.dawson*)
2. Click **Open Calendar**
3. The calendar will open in a new window. Note that it is open for viewing only and you cannot edit the calendar.
4. Once you have finished viewing the calendar click on the close window button  in the top right corner of the window to close it.



**Note:** You may need to have pop-ups enabled within your browser to use this feature. If you are using Internet Explorer and you see a **“Pop-up blocked”** message at the top of your browser window:

- Click on the **“Pop-up Blocked”** message
- Select **Always Allow Pop-ups from This Site....**

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## Shortcut Keys

Did you know shortcut keys can be used in Primary Email? Internet Explorer 6+ required.

**Example:** hold **Ctrl** and press the **Z** key to undo typing in a new email

### **Inbox Window:**

Navigate the inbox using the cursor keys ←↑↓→

Press Enter (Return) to open emails

Ctrl + N = Compose new email

Ctrl + R = Reply (to sender only)

Ctrl + Shift + R = Reply All (to sender and recipients)

Ctrl + Shift + F = Forward email

Delete = Move email to 'Deleted Items'

Shift + Delete = Permanently delete email

### **Compose Email Window:**

Tab = Move between input boxes

Ctrl + K = Check names (of senders in the **To:** and **CC:** boxes)

Ctrl + Enter = Send email

Ctrl + Z = undo typing in a new email

Ctrl + F = find text

F7 = Check spelling