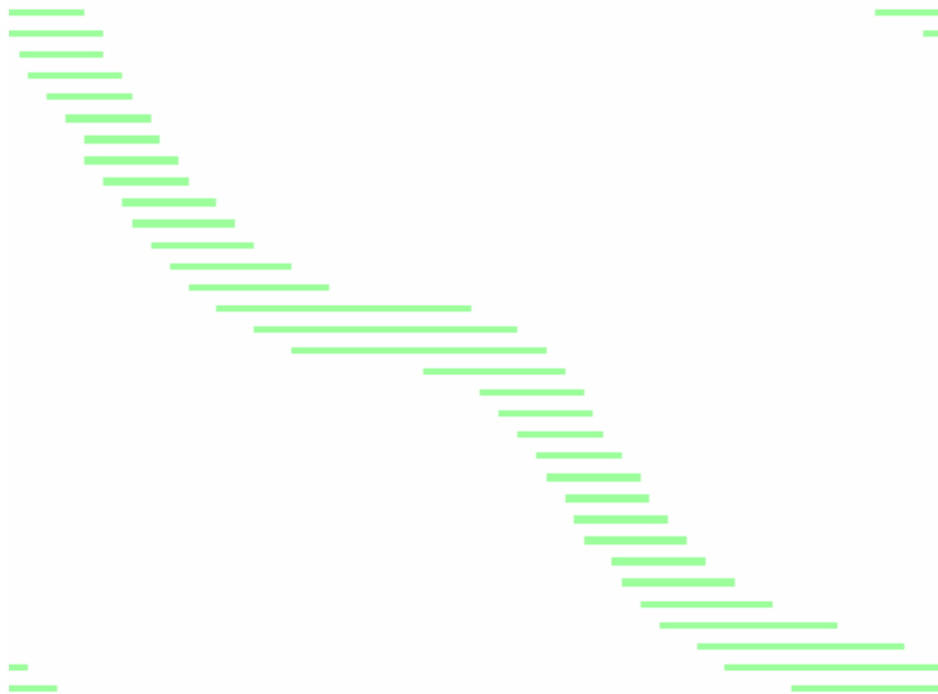


# **ITS** - Training



## **Getting Started with Entourage Mac Office 11, SP2**

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Information Technology Services - Training

The University of Texas at Austin

<http://www.utexas.edu/its/training>

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December 17, 2007

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# What is Entourage?

Entourage is a Mac Office groupware package for Mac OS X that allows you to check e-mail, maintain a calendar, organize an address book, and much more. This handout will focus on the use of Entourage with a Microsoft Exchange Server, Version 11, SP2.

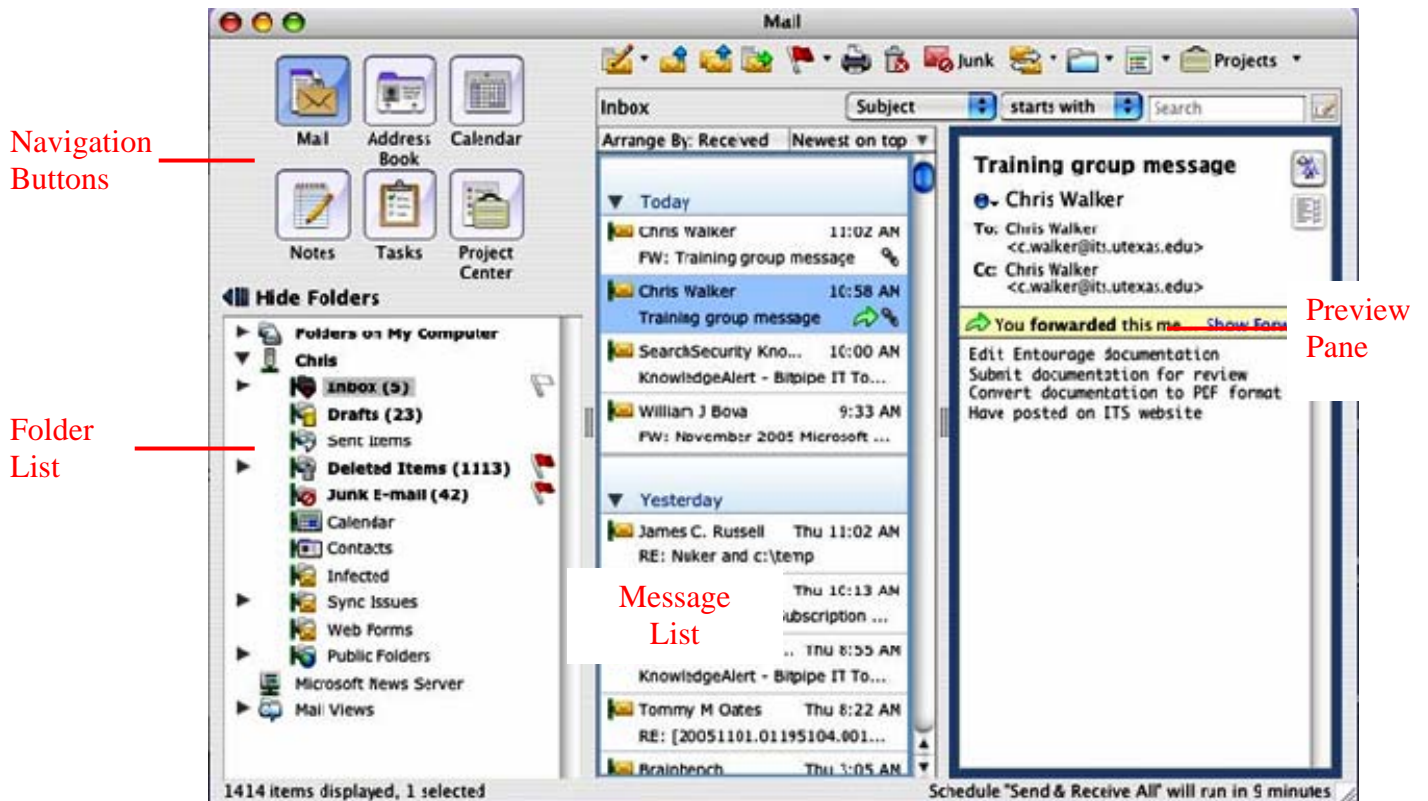
## Setting Up Entourage Profiles

For instructions on setting up Entourage to access your Exchange account on the Austin Exchange Messaging Service (AEMS) please visit <http://www.utexas.edu/its/messaging/answers/entourage2004.php>.

You will need to follow the instructions at [http://www.utexas.edu/its/messaging/answers/entourage\\_multiple.php](http://www.utexas.edu/its/messaging/answers/entourage_multiple.php) if you are using Entourage to access more than one profile from the same workstation.

## Entourage Navigation And Terminology

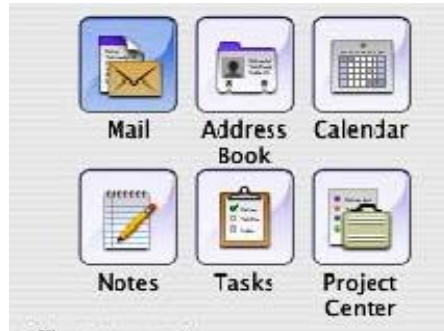
Entourage opens to display your e-mail messages with four main areas: Navigation buttons, Folder List, Message List and Preview Pane.



**Figure 1: Main Entourage E-mail Screen**

## Navigation Buttons

Click on any of the **Navigation** buttons to switch between Entourage features.

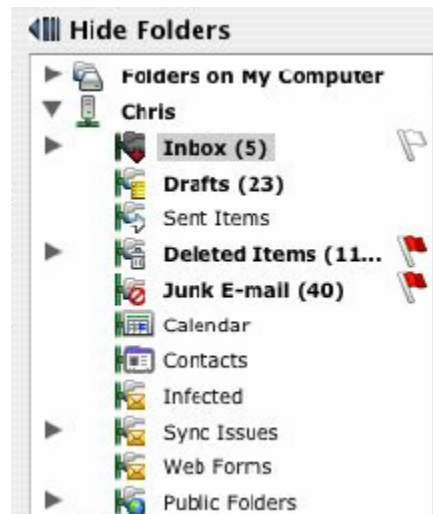


**Figure 2: Navigation Buttons**

## Folder List

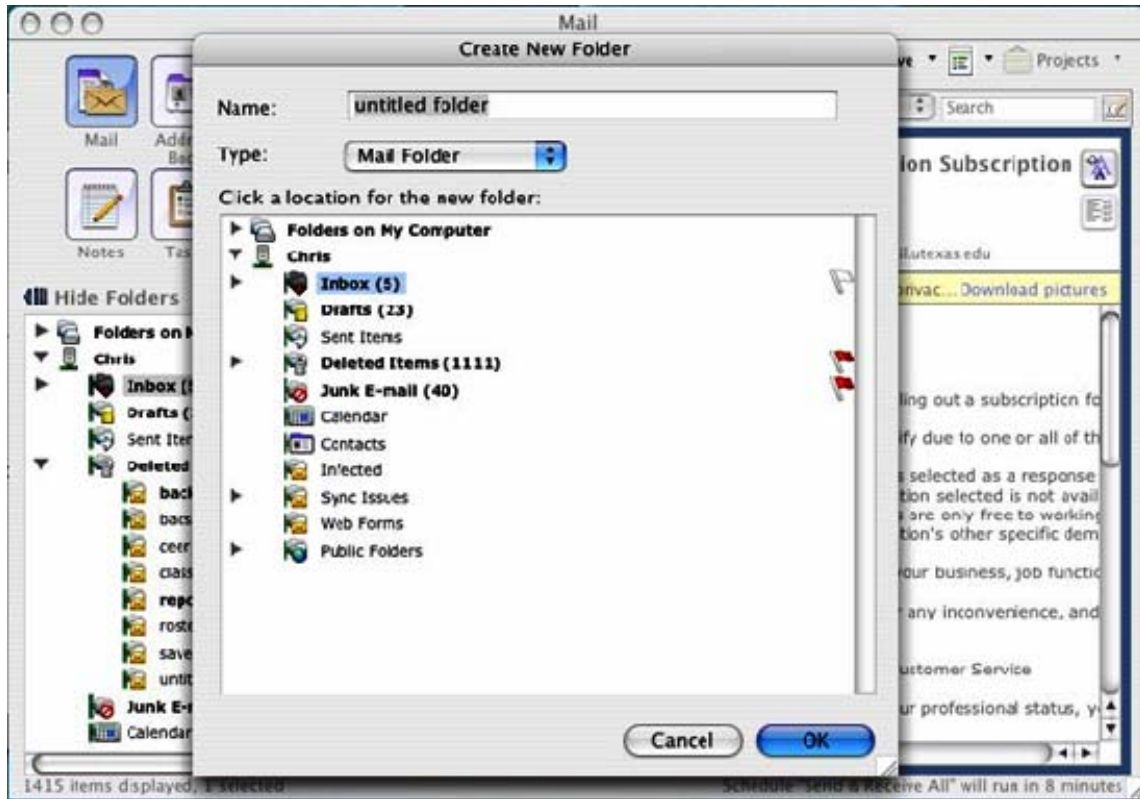
Your Folder list is sorted into files found on your hard drive and files found on your e-mail server. If you have not saved any e-mail files to your hard drive, you may wish to collapse that part of the list by clicking on the down arrow next to **Folders on My Computer**. That way, you can more easily see the folders stored on the Exchange server.

The e-mail files on your e-mail server are sorted into four default folders: Inbox, Sent Items, Deleted Items, and Junk E-Mail. Any additional folders you have on your e-mail server will also appear. If you are on an Exchange server, you will also see a link to the **Public Folders** that are visible by all users on the server.



**Figure 3: Folder List**

To create additional folders choose *File -> New -> Folder*. A dialogue will pop up allowing you to select where to place the folder. To place the folder in the **Inbox** for instance, you will highlight the **Inbox** and then click on OK.



**Figure 4: Creating A New Folder**

Once a folder has been created, you can drag and drop messages into the folder from the Message List or create a **Rule** to automatically send messages to that folder as they are received. Rules are discussed later in this document.

## Message List

The message list displays information from the e-mail message headers and can be sorted in many different ways. To sort by a field other than date, for instance, click the **Arrange by** drop down list and choose how you would like the messages to be sorted. You can also specify whether the messages should be sorted in ascending or descending order using the drop down menu to the right of the **Arrange by** menu, as well as display messages in groups.



Figure 5: Sorting Messages

To delete a message using the **Message List** click once on the message to select it then click the delete button from the toolbar. You can also delete a message from the **Message List** by selecting the message and pressing the Delete key on your keyboard. Once you have deleted a message it will be moved to your **Deleted Items** folder on your e-mail server. To permanently delete a message you must also delete it from your **Deleted Items** folder.

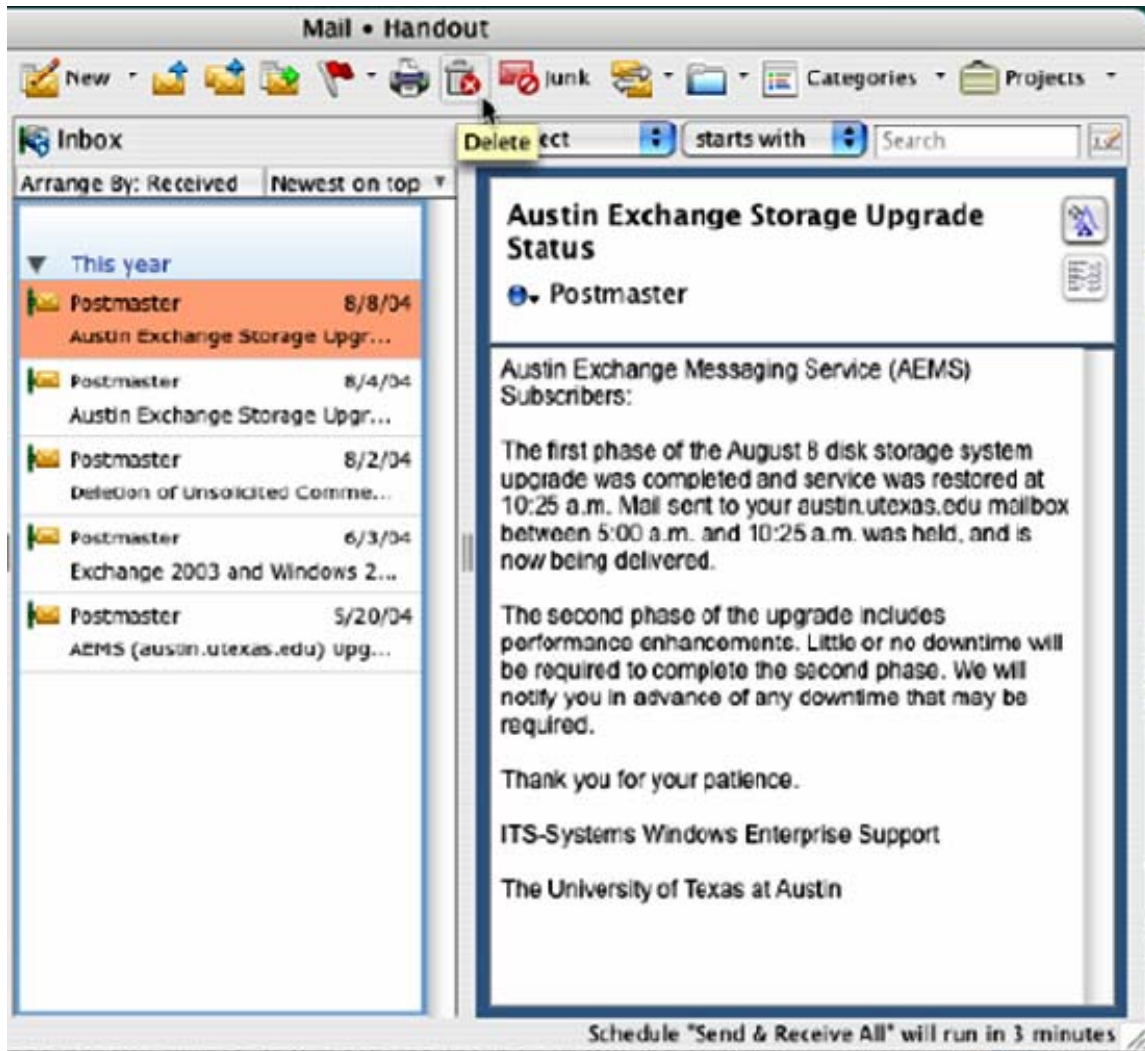


Figure 6: Mail Message

## Preview Pane

To view a message in the **Preview Pane** click once on the message in the **Message List**. To open a message in a new window, double-click on the message in the **Message List**.

## Entourage Sending and Receiving E-mail

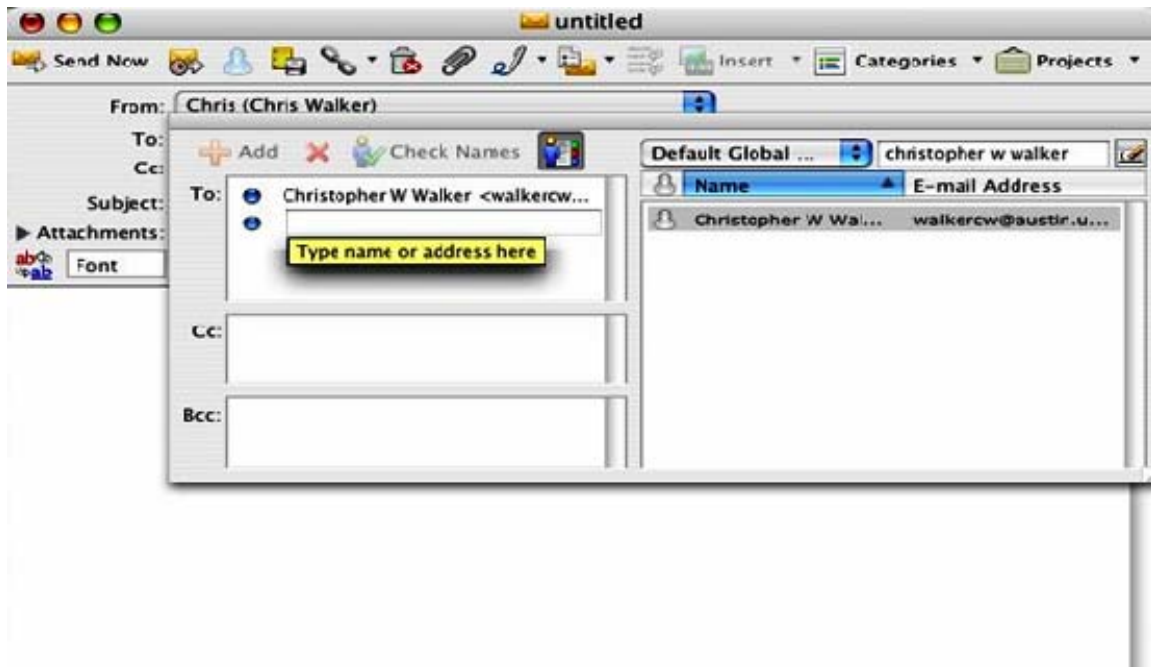
### Composing New Messages

To compose a new message, click the **New** button in the main Entourage **Mail** toolbar. Also note the **Reply**, **Reply All**, and **Forward** buttons located in the toolbar.



**Figure 7: Creating A New Message**

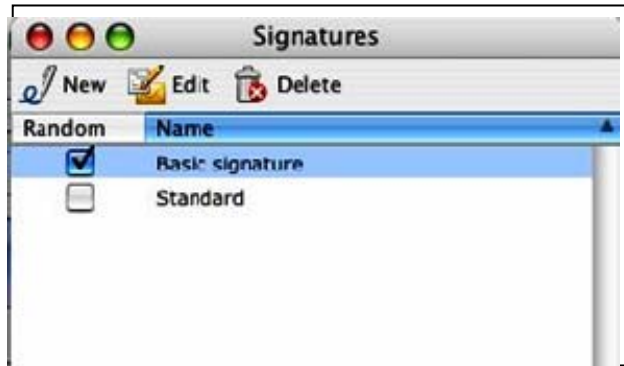
A new mail window will pop up. You will first type in the **Address** to send the e-mail to by clicking within the **To**, **Cc** or **Bcc** fields. You can either type in the e-mail address to send to, or you can select them off of the **Address Book**. You can also type in a person's or a group's name, which if recognized, will resolve to an e-mail address. (See the Address Book section below on the mailing lists available to Entourage, including your own contacts and groups.) Then, you will click on the message itself and type in the subject and the message into the message entry area on the window. When ready to send the message, click on **Send Now**.



**Figure 8: Typing In E-mail Addresses**

## E-mail Signature

You can create your own e-mail signature to be included on all new messages when you select the signature tab. Under **Entourage Tools**→**Signatures**, you can create a *New* signature. Click on *New* and type in your signature. Then, close the window. You will then be prompted to *Save* or *Don't Save* the signature. When you compose your message, there is a signature icon that will provide you a list of signatures to choose from.



**Figure 9: Creating E-mail Signatures**

Please note that signatures are not automatically included in Entourage e-mail. You have to perform additional steps for this to happen.

1. Go to **Tools**→**Accounts** on the main Entourage menu
2. Under Accounts, select the account to edit and then click on **Edit Account**.
3. Select the signature that you want to use automatically as the default signature for new messages under **Message Options**. The default signature is “none”.
4. When done, click on the **OK** button (not shown).



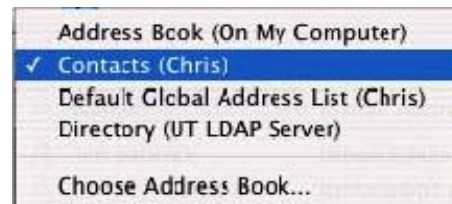
**Figure 10: Selecting a Default E-Mail Signature**

## Address Book

Entourage in the Exchange environment provides access to several different Address Books from which you can obtain valid e-mail addresses for your organizations

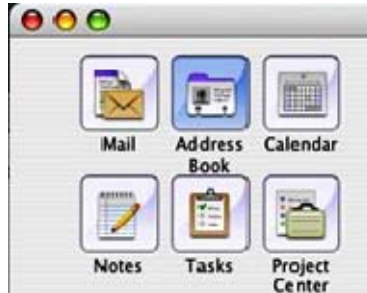
- Personal Address Book (Stored Locally)
- Contacts (on AEMS)
- Global Address List (from Exchange Server)
- UT Austin LDAP directory

This means that you have access to four different sources of E-mail address information, all of which are available when configured correctly for composing a message. If Entourage is configured to work with AEMS, you will have access to the **Global Address List** and the **Contacts** list. You will need to follow additional instructions to access the **UT Austin LDAP** server which can be found on the Answers page at <http://www.utexas.edu/its/messaging/answers/index.php>. (Note: You will have to select this address book from “Choose Address Book” before the LDAP directory entry will show up on your address book list as in Figure 11.)



**Figure 11: Selecting Your Address Book When Composing a Message**

Normally, on AEMS, you will use Entourage **Contacts** to store contact information for your friends, family, and business associates. Access the Contacts console in Entourage by clicking on the **Address Book icon**. The **Address Book** window displays a list of contacts in the upper portion of the window and a preview pane in the lower portion. You can sort the list by clicking column headings, and you can double-click a row to open the details for a contact. The **Address Book** provides views, rather than folders, that allow you to see a specific subset of your list.



**Figure 12: Address Book Navigation**

## Creating a Contact

**Figure 13: Address Book Contact Creation**

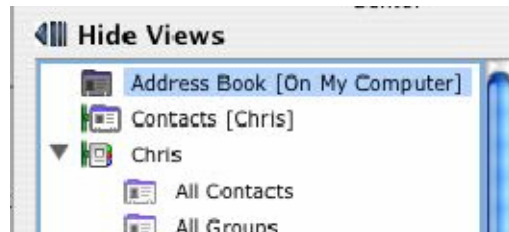
1. Click **Address Book**.
2. Click **New**.
3. In the **Create Contact** dialog box, enter the information you want for the contact.
4. To save this contact and close the **Create Contact** dialog box, click **Save & Close**.
5. To enter more information about this contact, click **More** and then enter any additional information you want and save the information entered.

You can also update your Address book while entering in an e-mail address by using the sequence Tools→Add To Address Book, typing the “Mac Symbol”= sequence next to the prior command or selecting CTRL→Click and “Add To Address Book” when an e-mail address is highlighted.

## Creating a Group In Your Address Book

You can create groups of contacts so that you can address an e-mail message to multiple people by group name.

1. In the Address Book, click on **Address Book [On My Computer]**



**Figure 14: Creating a Local Contact Group**

and then click **Add Group** (top of the Address Book window).



2. Name the group.
3. Click in the list box to add e-mail addresses to the group.
4. Click on the **Save Group** (diskette) icon.



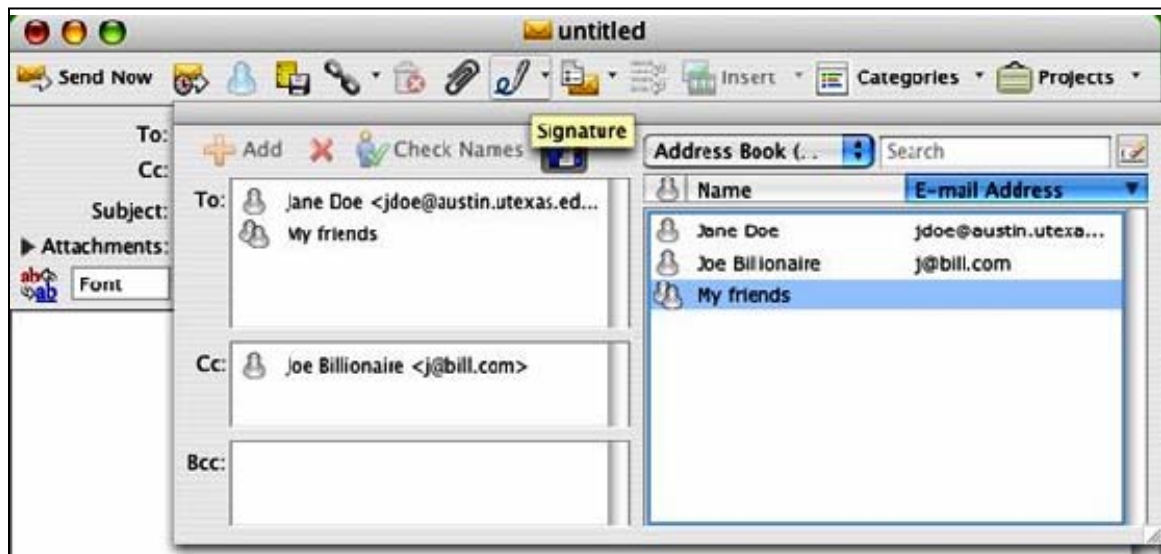
**Figure 15: E-Mail Group Creation**

The group name will appear in your **Address Book** on your computer. To save this information in your **Contacts** folder, simply drag the addresses from your **Address Book [On My Computer]** to your **Contacts** folder on the AEMS server.

## Using the Address Book

When composing a message you can easily retrieve addresses from your address book in two ways. When you begin typing in a name or address, Entourage will automatically suggest any matches from your address book or from previously entered e-mail addresses that you may not have ever entered into the book. (In the latter case, Entourage automatically stores e-mail addresses, whether or not they are valid.) If you see the address you are looking for, click on it with your mouse and it will be added to the field.

You can also display your address book while composing a message by clicking on the **Address Book** icon when adding addresses to the To, CC, or BCC fields. The **Address Book** will appear on the right. Add addresses by clicking and dragging them into the appropriate field or by doubling clicking on an address.



**Figure 16: Entourage Local Address Book**

Please remember to select **Contacts** when using your address book stored on the server. If you need to communicate with someone not on your address book who is a member of the UT Austin community, select **Default Global Address List** or the **Directory (LDAP)**.

# Entourage Calendars

## Viewing the Calendar

To view your **Calendar**, click **Calendar** in the navigation pane. Click on the **Calendar** that is associated with your Exchange account when you set up **Entourage**, not **Calendar (On My Computer)** in the **Calendar** view window.

The **Calendar** is displayed in the **Month** view, or whichever view was last used.



Figure 17: Typical Entourage Calendar

You can view your calendar in increments of a day, a work week, a week, or a month by clicking on the appropriate button in the toolbar. You can also jump directly to a specific date by clicking the **View Date** button.

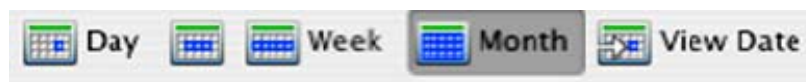
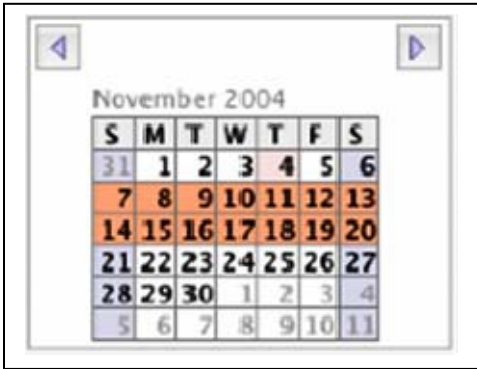


Figure 18: Calendar Views



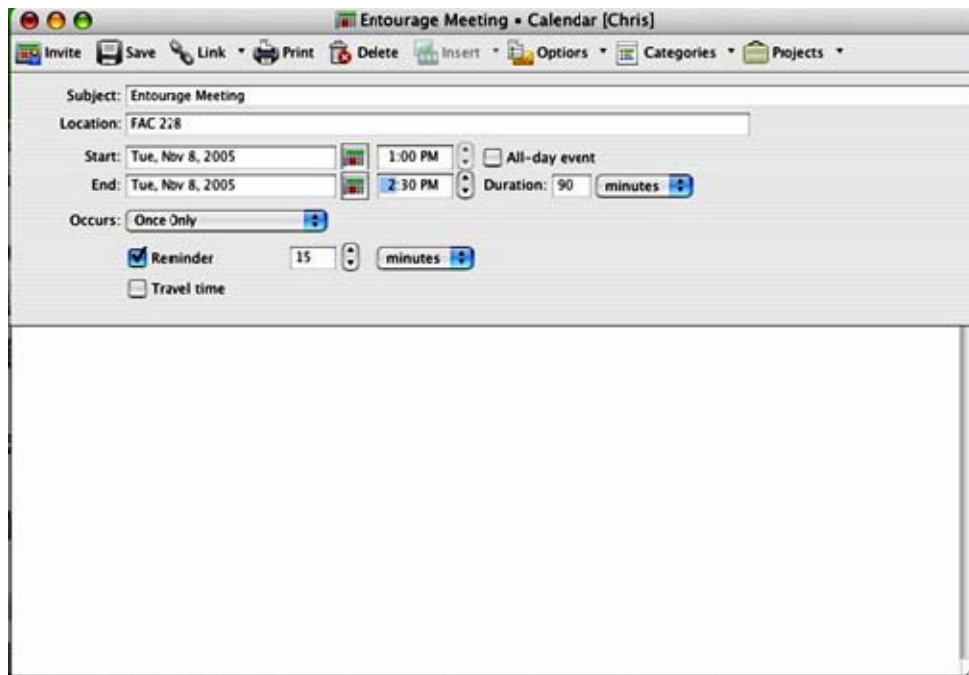
The small calendar on the left allows you to switch to a different month or to drag across the date range that you would like to view.

**Figure 19: Selecting Calendar Month**

## Creating an Event or Appointment

Entourage allows you to create events on your calendar that last all day or for a specific duration. These events can occur just once or appear as recurring events. You can even send an invitation to an event to other users on the Exchange server to set up meetings.

1. Click **Calendar**.
2. Click **New**.
3. In the **Subject** box, type the name of the event.
4. Type in a location in the **Location** box.
5. Enter the start and end dates and times.
6. Select any other options you want.



**Figure 20: Creating An Event or Appointment in Entourage**

You can also create a new event by double-clicking the date and time of the event in Day, Work Week, Week, and Month views. You can set a reminder for an event that Entourage will display before the event start time. The default reminder time is 15 minutes before the event start.

## Recurring Events

You can tell Entourage to schedule a recurring event while creating your appointment or event. Events can recur daily, weekly, monthly, or a specified number of days apart.

1. When scheduling an event, choose a frequency from the Occurs dropdown list.

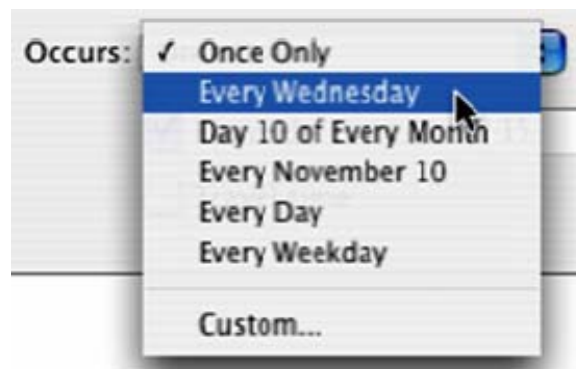


Figure 21: Selecting Event Recurrence

2. Click the Edit button next to the frequency.



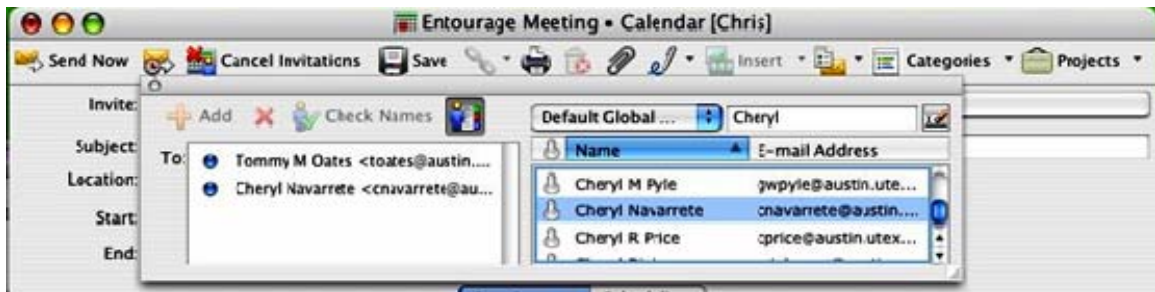
Figure 22: Editing Event Recurrence (Advanced)

3. Choose no end date, a set number of recurrences, or an end date for the event.
4. Click OK.

## Setting up a Meeting

You can schedule events that you want to invite others to, such as meetings.

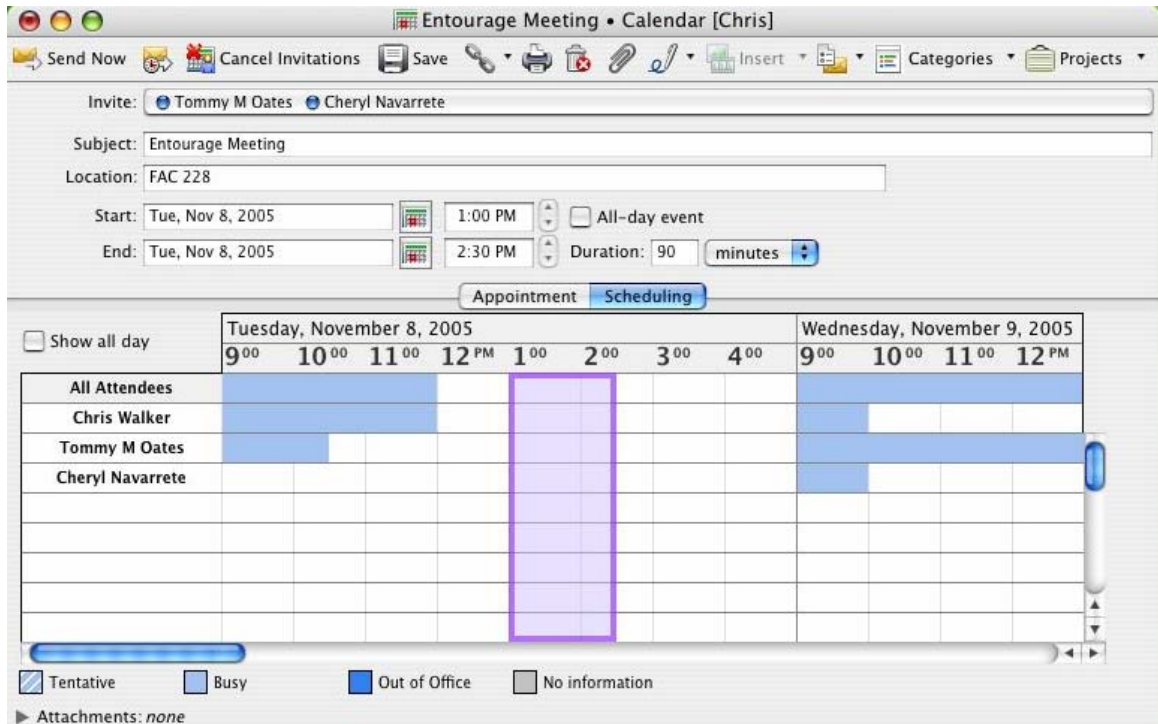
1. When creating an event, click the **Invite** button in the event toolbar.
2. In the **Invite** box add contacts from your address list or, if you are on the Exchange server, select the **Default Global Address** list as your address book.



**Figure 23: Inviting and Selecting Meeting Attendees**

When adding contacts from the **Global Address** list (labeled **Default Global ...**) you will also be able to view their free and busy times. This will help you avoid scheduling events when critical attendees cannot be there.

3. To do so, click on the **Scheduling** tab to view the schedules of the Exchange users.
4. Click **Send Now** or **Send Later** (The send icon with the clock), as illustrated below.



**Figure 24: A View of the Scheduling Tab to Pick Ideal Meeting Time**

If you're an Exchange user or if the recipient's e-mail program supports Internet Calendaring (iCalendar), the recipient can use e-mail to accept, tentatively accept, or decline your invitation.

## Making a Private Appointment

When editing a meeting or appointment from the calendar menu, you can designate the reserved time as private, i.e., the contents and identification of the event are not visible to other users. Go to Event and select Private.

## Sharing Your Folders

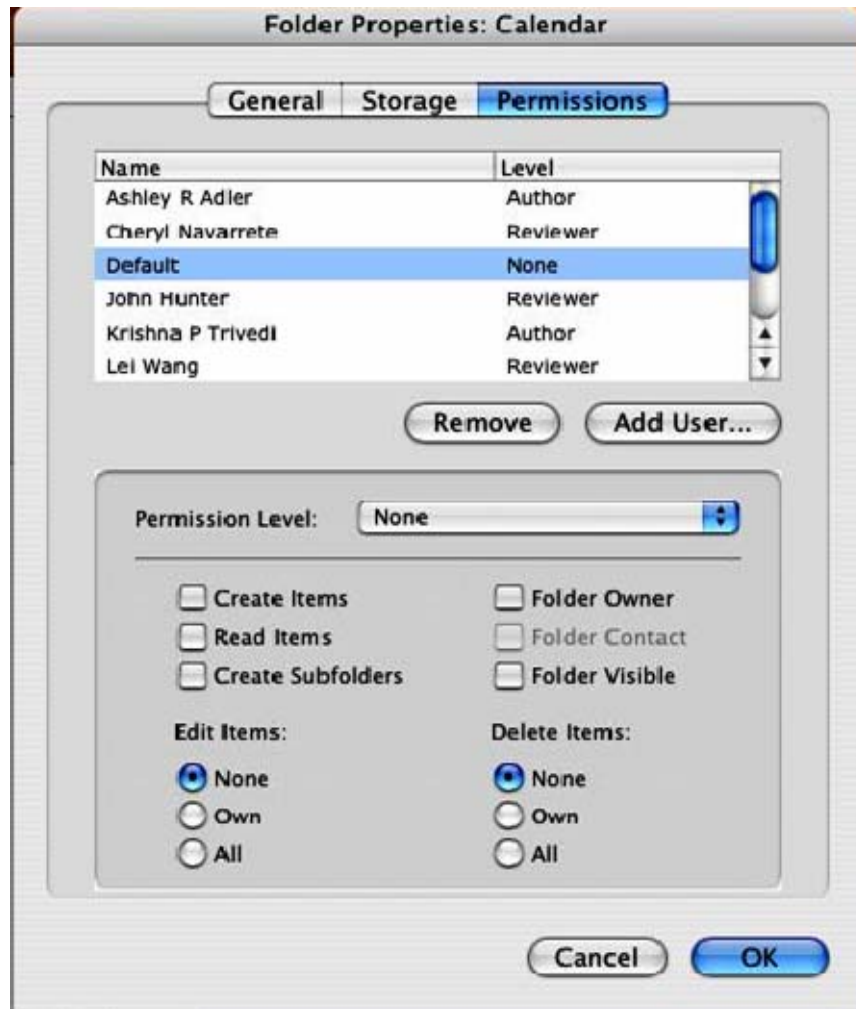
You can share your calendar, inbox, tasks or other Entourage folders.

1. Select the navigation icon of the folder you would like to share, such as Calendar or Inbox. (Normally, only calendars are shared, but sharing your Inbox is a way to have a group e-mail inbox be accessible to many people without having to share passwords, which is a nice thing to do.)



**Figure 25: Pick The Exchange Folder to Share from Entourage**

2. Select the Exchange Folder you want to share, be it contacts, mail, calendar, tasks, etc., as illustrated in **Figure 25**. Then, go to **Edit→Folder Properties**
3. Then, set the permissions that you would like for your folder. Existing permissions will already be visible. If you change your **Default** permissions, you can make your selected folder visible to all Exchange subscribers.



**Figure 25: Sharing Your Calendar With Others**

## Designating Delegates

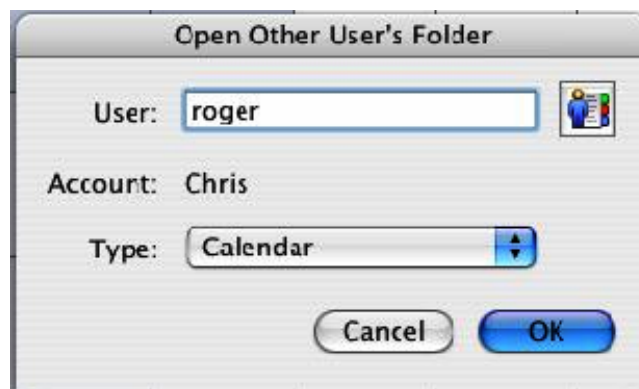
If you're an Exchange user, you can specify another person as a delegate, so that they'll be able to accept or decline meeting requests, or even read e-mail, on your behalf. Before you can access and manage another person's Exchange information, they must give you delegate access. Delegate access can only be set up and managed by using Microsoft Outlook. For instructions on assigning delegate access please reference the ITS document in the "Answers" section for Premium E-mail services called "Accessing Mailboxes if you are a Delegate (Mac)," at [http://www.utexas.edu/its/messaging/answers/mac\\_delegate.php](http://www.utexas.edu/its/messaging/answers/mac_delegate.php). The document references delegate creation using the Outlook program.

Please note that if you cannot see the free/busy information for a specific user, you might want to check delegate permissions with the calendar owner. Additionally, this problem happens if Outlook or Entourage has never been set up on the Exchange server for the specific user you are trying to look at. You will encounter this problem also if you selected the user's e-mail address off of your local address book or contact list and not the **Default Global Address List**. Otherwise, you might need to contact your Exchange system administrator to find out what the problem is.

## Viewing Someone Else's Calendar

Looking at someone else's calendar one at a time, or viewing an Exchange server managed resource such as a room or a piece of equipment, is easy in Entourage.

1. Select **File->Open Other User's Folder**
2. Enter in the name of the person whose folder you wish to see. (Calendar is already selected as a default)



**Figure 26: Viewing Someone Else's Calendar**

3. Click OK. If further information is needed, or you click on the Find User tab to the right of the User field, the search dialog will pop up, giving you a chance to pick the specific person's calendar or resource to access.

4. Once you have selected a calendar, or a resource, Exchange determines if you have permission to access it. If you do, the person's calendar, or other folder, such as e-mail, will appear on your screen if you have permission to see it and a view for it will appear in the Calendar View.

Using the same process, you can view room resources directly, and then schedule meetings in the same manner that you schedule any other appointment. While editing an event, you can also go to the **Events** menu and **Invite Attendees** and mark the event as private. Please note that you must have read/write access to this resource before you can schedule meetings for it yourself. The resource owner must still approve the meeting. *We recommend that you do not mark UT resource reservations as private since these cannot be rescinded even by the resource owner.*

You can also see resources from the Contacts folder in the folder list and also from the Address Book. However, do not try to access resources from the Address book at this time since there appears to be a bug in that function when searching for non-people resources.

## Mail Rules

You can set up rules in Entourage to sort your mail for you as it is received. You may want all mail from a certain sender to be delivered to a certain folder. This feature can be used to store certain types of messages on your local machine to save server disk space.

1. From the **Tools** menu choose **Rules**.
2. Click the tab for the type of e-mail account you are using. In the case of Exchange server users, click on **Mail (Exchange)**. (You must set up separate rules for each e-mail account you access through Entourage.)



Figure 27: Setting Up Mail Rules

3. Click **New** in the **Rules** window.
4. Name your rule and specify the criteria that a message should meet in order for the rule to be executed.
5. In the **Then** section, specify what actions should be performed on the messages that meet the criteria.



Figure 28: Configuring Mail Rules

6. Click OK.

On Microsoft's site, there is more comprehensive information on creating rules. These documents can be found at:

office.microsoft.com→Office for Mac → Entourage 2004 → Articles and Tips

You should also use Rules to create out of office messages there since is no **Out of Office Assistant** for Entourage as exists with Outlook. However, the **Microsoft Office 2004 for Mac Resource Kit** from Microsoft does address this issue.

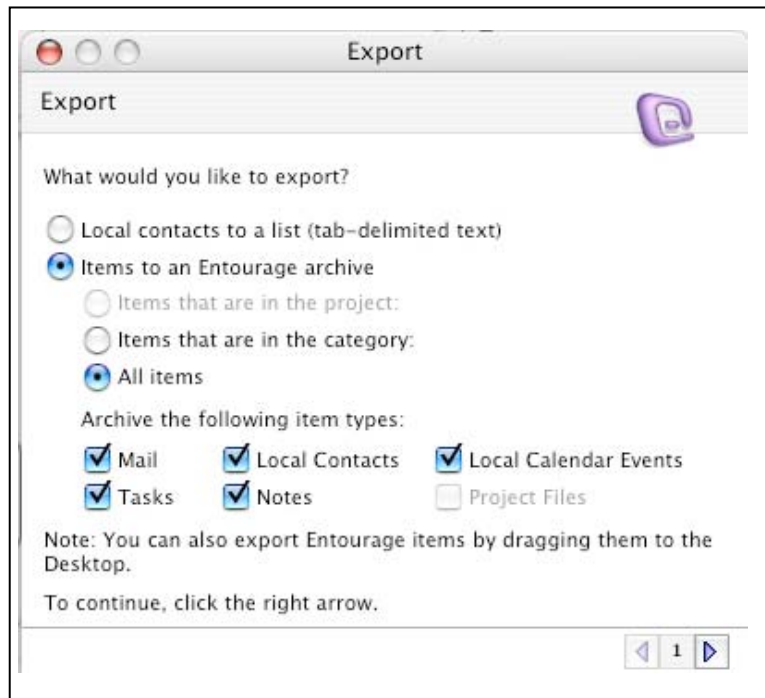
Remember, message rules do not run on the Exchange server as is the case with many rules configured through Outlook, but are client-side rules. You will have to be running Entourage to apply rules. To apply rules to your e-mails received before starting up Entourage, use **Message→Apply Rule**.

## Emptying the Deleted Items Folder

You can empty the **Deleted Items** folder manually or automatically. To empty it manually, simply type CTRL-Click on the **Deleted Items** folder and it will be emptied. To delete the contents automatically, go to Run Schedule at **Tools→Run Schedule→Empty Deleted Items Folder** and set a schedule to clean out the **Deleted Items** folder. You must select the **Deleted Items** folder on the server in order to ensure that deleted messages do not accumulate and fill up your disk quota; otherwise, only messages stored locally will be deleted.

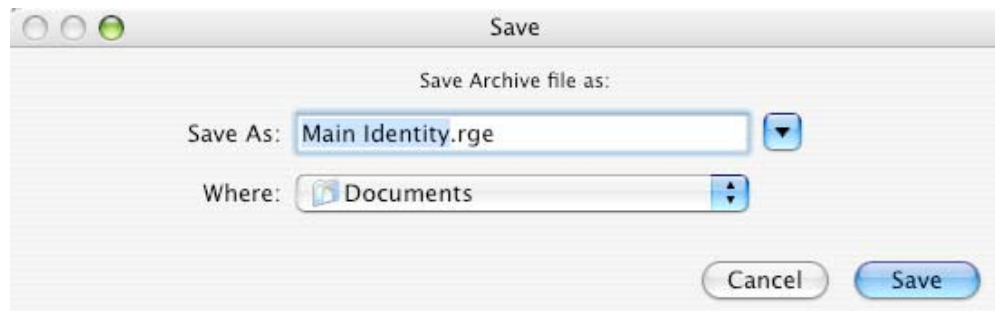
## Creating and Restoring Message Archives

Entourage has a built-in archiving capability. Select **File→Export** to activate the Export menu. You can export **Mail, Tasks, Local Contacts, Notes** and **Local Calendar** events. Note that you can archive items by category, such as all e-mail associated with a project. However, you cannot archive items by date. You cannot export group information directly. Then, click on **Next**. After that, you have the choice to keep items in Entourage after they are archived.



**Figure 29: Exporting Message Archives**

You will then get a choice in which file to archive your Entourage content. The default file extension is “rge”. Please choose an appropriate filename to ensure proper identification and retrieval of the archive later.



**Figure 30: Saving Entourage Archives**

Restoring Entourage content requires going to **File→Import** and loading the appropriate “rge” file. Here are a couple of tips from the UCSF information retrieving and examining Entourage archives:

- If you need to refer to information stored in an archive temporarily. Create a new identity and import the information into it. Then, when you are finished, you can simply delete the new identity.
- If you want to explore the contents of an archive, CONTROL+click the .rge folder and then click **Show Package Contents**.