

Outlook 2003

Manual - Foundation Level



SAMPLE

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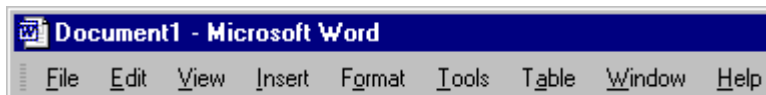
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Course Basics

Toolbars

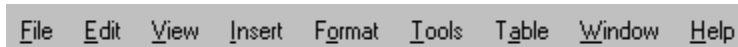
The Title Bar

- The title bar is displayed along the top of almost all program, folder and dialog box windows. It is used to display information such as the name of the application (or folder) and the document you are working on. Information which is displayed here may vary. The example shown illustrates the title bar for a program called **Microsoft Word**, in which a document called **Document1** has been opened or saved:



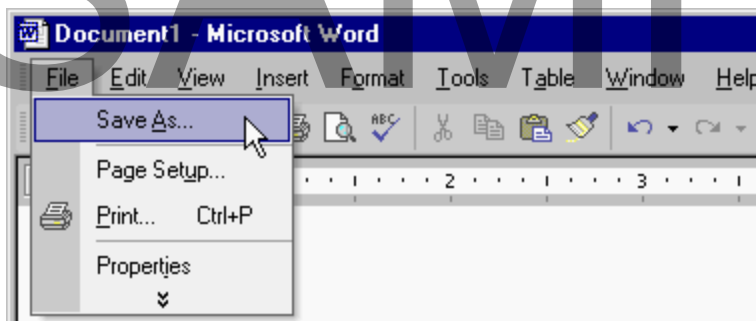
The Menu Bar

- The menu bar is located under the title bar, and contains a series of drop down menus. The example shown illustrates the Microsoft Word Menu Bar:



To execute Menu commands

- In most cases, you are asked to use the mouse to execute a series of menu commands (e.g., **File > Save As**). What this means is that you select **File** from the main menu, followed by **Save As**:



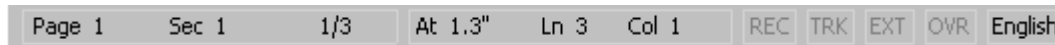
The Tool Bar

- The tool bar contains a series of icons, which allow you to achieve a desired effect as quickly as possible. In the example shown, taken from the Microsoft Word Formatting toolbar, to make the selected text bold, you would click on the **Bold** icon:



The Status Bar

- Most application windows have a status bar displayed along the bottom of the window. In the example illustrated, taken from Microsoft Word, the status bar conveys information about the page within the document which you are working on, along with other relevant information:





The Scroll Bar

- When a program or folder needs to display information within a window, two sets of scroll bars may be displayed along the bottom and right side of the window. By using the scroll bars it is possible to move to any position within a document and also work on a document many times bigger than your physical screen size.

To move up and down within a window (using the scroll bar)

- To scroll upwards in a window, click on the upwards-pointing arrow at the top of the vertical scroll bar: 
- To move downwards in a window, click on the downwards-pointing arrow at the bottom of the vertical scroll bar: 

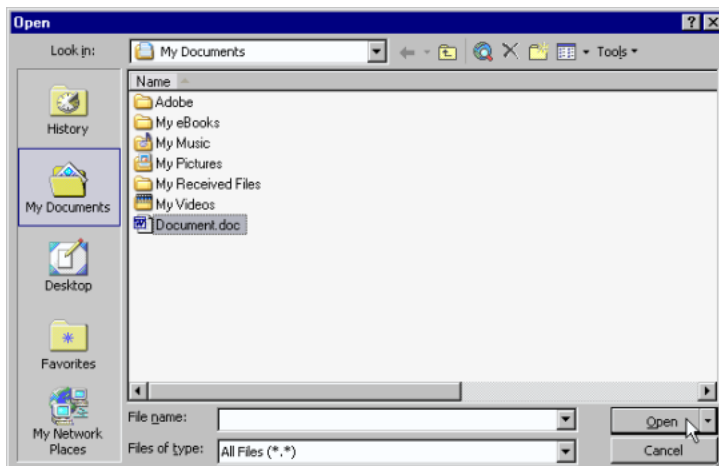
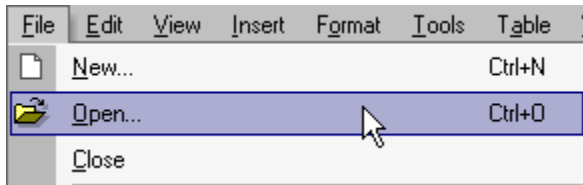
To move right to left within a window

- To move to the right-hand side of a window, click on the right-hand arrow on the horizontal scroll bar: 
- To move to the left-hand side of a window, click on the left-hand arrow on the horizontal scroll bar: 

File Management

Opening Files

- From the main menu, select **File > Open** command or click on the **Open** icon and select the required file from the dialog box displayed:

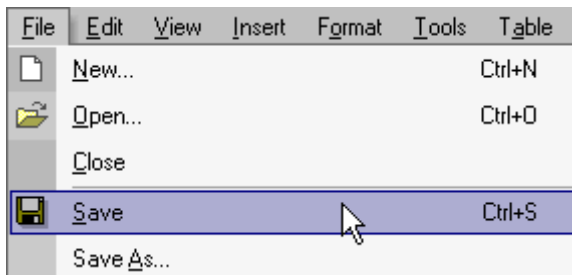


- Use the **Look in** drop-down menu to select the drive or folder which contains the file you want.
- To open the file you require either double-click on the file name or select the file name by clicking on it, and then click on the **Open** button.

Saving Files

To save a new document

- From the main menu, select **File > Save** command or click on the **Save** icon and from the dialog box displayed select the required folder. Enter a file name and then click on the **Save** button:



- After you have saved the file for the first time, clicking on the **Save** icon will automatically save your document with the filename you gave it. It does not give you the option to rename.

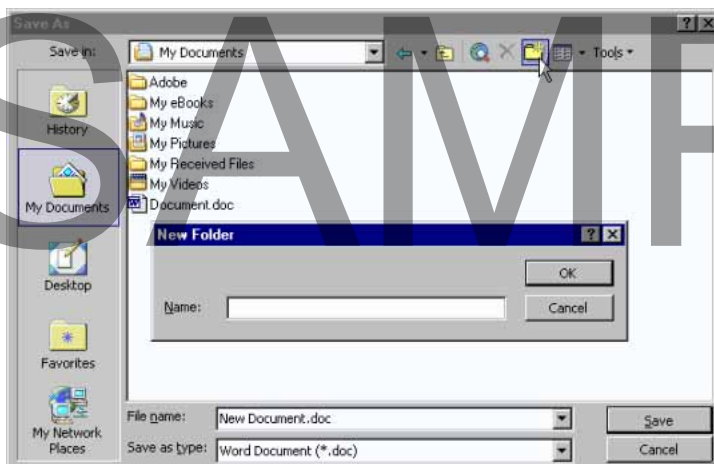
To save a document under another name and/or location

- The **Save As** command can be used to save a file under a different name, to save a file in a different word processor format, or to save a file to a different drive and/or folder. From the main menu, choose **File > Save As** command.

Note: The **File > Save As** command will rename the document on the screen so that you can keep the earlier version, as well as saving any changes you have made.

To create a new folder in which to save your document

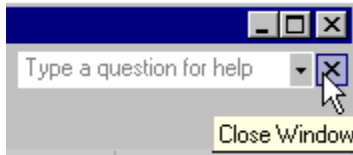
- Click on the **Create New Folder** icon, displayed within the **Save As** dialog box.
- This will display the **New Folder** dialog box. Enter the name of the new folder, and then click on the **OK** button:



Note: The folder will be created under the current folder.

Closing Files

- Click on the **Close Window** icon displayed at the top-right of the document window. Be sure to click on the **Close Window** icon, (as opposed to the **Close** icon):



Installing the Sample Files

- Use Windows Explorer to create a folder called **Outlook 2003 Foundation Samples**, in the **My Documents** folder.
- If you are installing the sample files from the CD-ROM, place the CD-ROM in the CD drive and copy the files from the **outlook_2003_foundation_usa\exercise_files** to the **My Documents\Outlook 2003 Foundation Samples** folder.
- If these files have been copied to your network server, then ask your trainer/supervisor for more information about how to copy these files to your PC's hard disk.

- **Notes for tutors:**

The above instructions are for Windows that has not been set-up for a multi-user environment (with individual profiles). The instructions above may require modification within a Windows mutliuser environment. Where possible pre-install the relevant work files prior to use by students/delegates.

SAMPLE

Introduction to Outlook 2003

When you have completed this learning module you will have seen how to:

- Use the Main Menu
- Use the Standard Toolbar
- Use the Advanced Toolbar
- Use the Navigation Pane
- Use the Office Assistant
- Customize Outlook Today
- Customize a Toolbar
- Create a New Toolbar
- Create a Custom View
- Add Time Zones
- Use the Navigation Pane

What is Outlook 2003?

Outlook 2003

- Outlook 2003 is a fully integrated email system that allows you to have accounts for Internet, Exchange Server and Hotmail emails, and enables you to be a client for alternate messaging systems.

Outlook 2003 can be used as a time-tracking tool, with calendar, contents and tasks – as well as a full email system, with access to web sites, and Internet newsgroups.

Delivery

- **Outlook 2003** will run on various operating systems, including Windows XP, Windows ME, Windows NT and Windows 2000. Email messages can be sent in HTML, Rich Text or Plain Text formats. Depending on the size, files from most outside applications can be attached to an email.

Setting up Outlook 2003 to send and receive emails

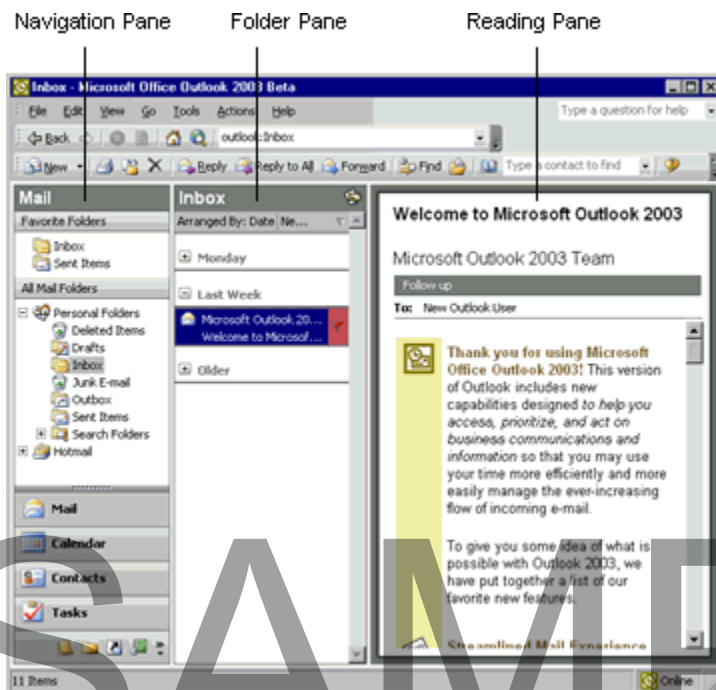
- To send and receive email messages with Outlook 2003 you will need an email account and Internet access.

- Contact your Administrator or your Internet service provider (ISP) to get connected.
- If you use more than one email account, Outlook 2003 now allows you to view multiple email accounts within the same window.

Outlook 2003 Workspace

⚠ Exploring the Outlook 2003 Environment

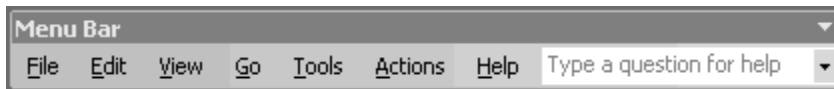
- The Outlook 2003 environment has changed significantly from previous versions. The Preview Pane has been replaced by the **Reading Pane**, which, by default, is on the right side of the screen.
- The Outlook Bar has been replaced by the **Navigation Pane**:



- All of these changes provide a streamlined interface for improved ease-of-use.

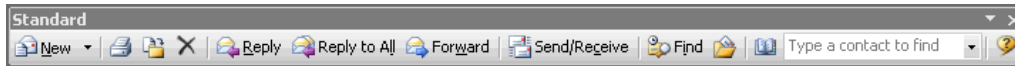
Using the Main Menu

- The **Main Menu** bar can display a range of drop down menus. It also includes an **Ask a Question** field where questions can be typed directly.



Using the Standard Toolbar

- The **Standard Toolbar** holds a variety of shortcut icons of actions:



- When Outlook is launched, the default setting has the **Standard Toolbar** sitting below the **Main Menu** bar.
- To move the toolbar, place the cursor over a partition in the toolbar until the arrow appears; click and drag to have the menu bar and toolbar alter positions.

NOTE: The Standard toolbar changes depending on which view you have selected in the Navigation Pane.

Using the Advanced Toolbar

- From the main menu, choose **View > Toolbars > Advanced** to open the **Advanced Toolbar** under the main menu.
- The **Advanced Toolbar** holds more icon shortcuts to actions located in the main menu:



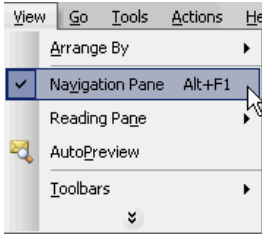
- The advanced toolbar can be customized with alternate icons.

NOTE: The Advanced toolbar changes depending on which view you have selected in the Navigation Pane.

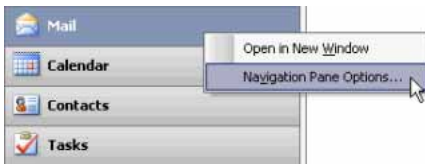
Using the Navigation Pane

- The **Navigation Pane** is new to Outlook 2003. It replaces the **Outlook Bar**.
- From the main menu, choose **View > Navigation Pane**

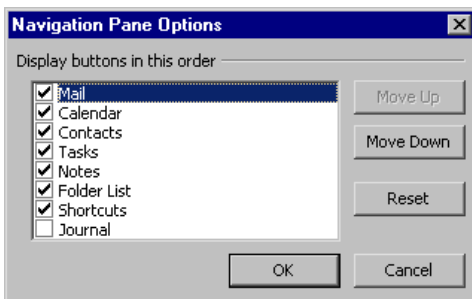
OR press the **Alt + F1** key combination to open the **Navigation Pane** with shortcuts at the far left of Outlook's workspace:



- The **Navigation Pane** area holds the Mail, Calendar, Contacts, Tasks, Notes, Folder List, Shortcuts, and Journal icons.
- By right clicking on any of the icons in the Navigation pane, a pop-up menu will appear:



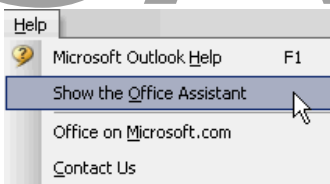
- By selecting **Navigation Pane Options**, you will open the **Navigation Pane Options** dialog box:



- Here you can choose which buttons to show in the pane, as well as the order in which they are shown.

Using the Office Assistant

- From the main menu, choose **Help > Show the Office Assistant**:



- This will open the familiar Microsoft paperclip **Office Assistant** program:



- If opened in any area within Outlook, **the Assistant** will automatically ask a question pertaining to the area, be it **Notes**, **Journal**, or the **Calendar**.

Customize Outlook Today

Customizing Outlook Today

- The **Outlook Today** panel is the first item seen when Outlook is launched, so you can customize it to show you the items you need to be informed of immediately.
- To open the **Outlook Today** page, click on the **Shortcuts** icon in the **Navigation** pane and then click on the **Outlook Today** link:



- The default setting of the **Outlook Today** panel will show the **Calendar**, **Tasks**, and current **Messages** information.
- To customize the panel, select the **Customize Outlook Today** button:

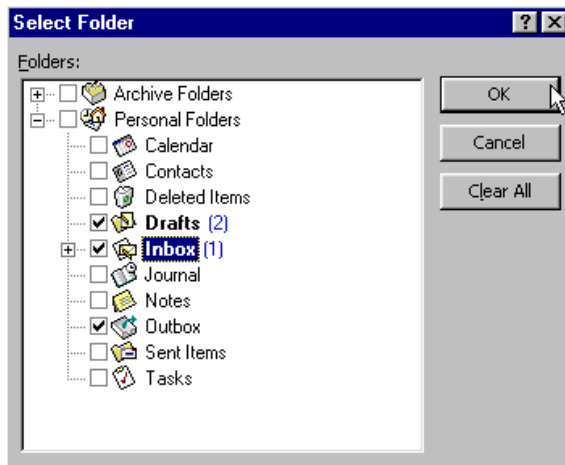


- This will open the **Customize Outlook Today** folder:



- **Startup** - If unchecked, this will have Outlook start with the **Folder** pane showing. If checked, the Outlook Today folder will show.
- **Calendar** - The default setting shows 5 days of calendar items. This can be altered.
- **Tasks** - The default setting shows all tasks, but you can select to have only today's tasks appear. Tasks can also be sorted with the two separate sorting fields.
- **Styles** - The default style setting is **Standard**, which is the three column format. There is also **Standard (two columns)**, **Standard (one column)**, **Summer** and **Winter**. The **Summer** style has a yellow background with two columns, and the **Winter** style has a white background with two columns.
- **Messages** - If there are any other folders besides the **Inbox** that may have unread messages being sent to them, because of a rule that was created, selecting the **Choose Folders** button will open the **Select Folder** dialog box, where multiple folders can be selected to show up in the **Outlook Today Messages** area:

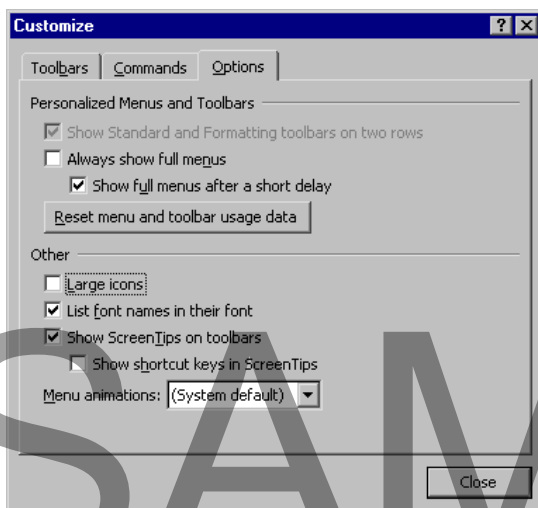
SAMPLE



- Once all changes are done, select the **Save Changes** button at the top of the panel, or click **Cancel** to undo any changes.

Customizing the Toolbar

- From the main menu, choose **Tools > Customize** to open the **Customize** dialog box. Select the **Options** tab:

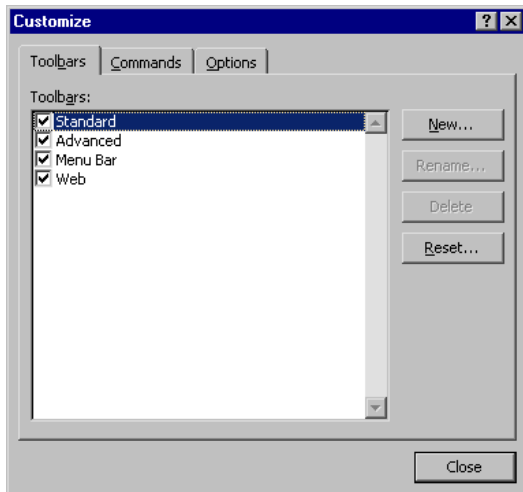


- **Show Standard and formatting toolbars on two rows** - Sets the Standard and Formatting toolbars onto two rows in forms such as a Message.
- **Always show full menus** - When deselected, enables Outlook 2003's adaptive menu option, where only tools that are frequently used appear in the toolbar. Any others are hidden.
- **Reset my usage menu and toolbar usage data** - Clicking this button resets all default menus and toolbars if the **Always show full menus** checkbox is unselected.

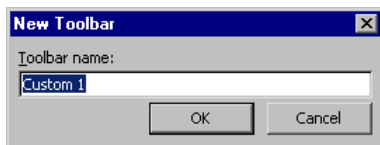
- **Large Icons** - Displays large icons within toolbars and menus. If unselected, all icons will remain small. This is useful on small screens.

Creating a new Toolbar

- From the main menu, choose **Tools > Customize** to open the **Customize** dialog box. Select the **Toolbars** tab:



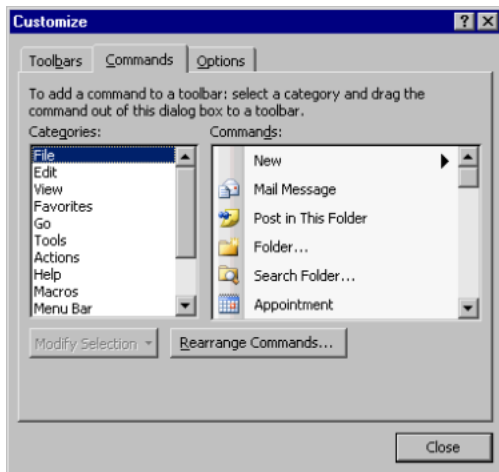
- Click the **New** button to open the **New Toolbar** dialog box:



- Enter a new name for the toolbar, and click **OK**.
- The new toolbar will now be listed in the **Customize** dialog box's **Toolbars** list, and a prototype toolbar will have been created beside the dialog box:



- Select the **Commands** tab in the **Customize** dialog box:



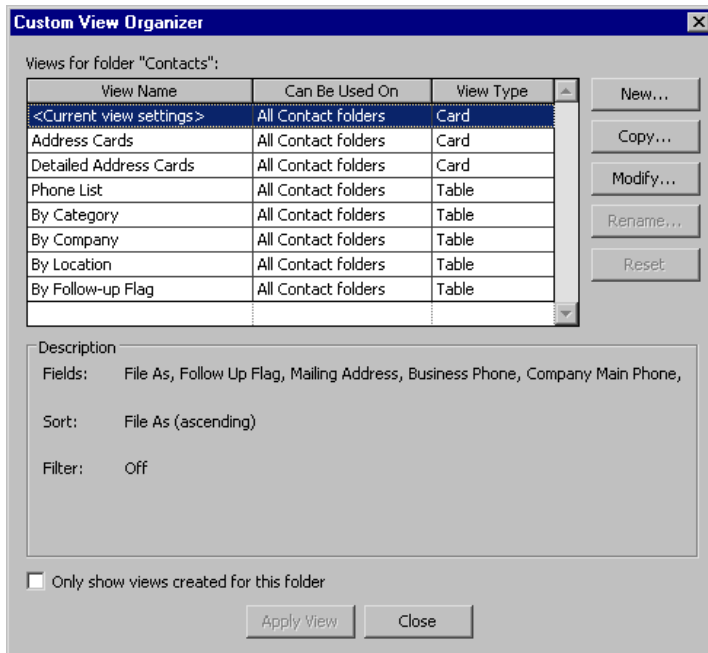
- Select a category from the **Categories** list on the left for the first tool in the new toolbar.
- Select a command, menu, or list from the **Commands** list on the right, and drag it onto the prototype toolbar:



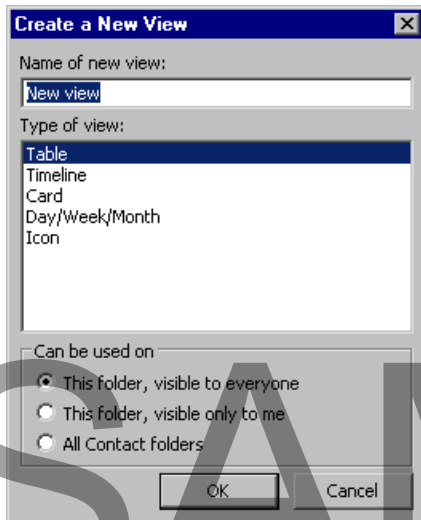
- The icon will appear on the new toolbar. Repeat the above step as many times as required for the desired tools to be on the new toolbar. The width of the toolbar will increase with each addition.
- Once done, click **Close** to close the Customize dialog box.
- Click and drag the new toolbar the position of your choosing.

Creating Custom Views

- Begin by revealing a view that displays the items you want in the custom view. For example, the contact list or a message folder.
- From the main menu, choose **View > Arrange By > Current View > Define Views** to open the **Custom View Organizer** dialog box. The opened view will have its name appear at the top of the dialog box:

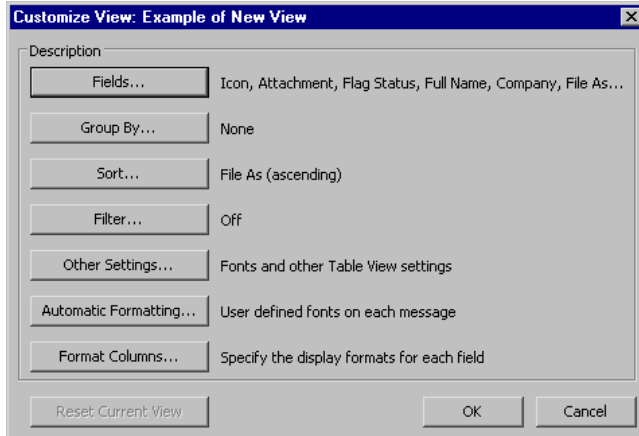


- Click the **New** button to open the **Create a New View** dialog box:



- Enter a new name for the view in the **Name of new view** field.
- Select the type of view to create from the **Type of view** list.
- The **Can be used on** section allows you to set how the view will be used, **this folder, visible to everyone**, **this folder, visible only to me**, or **All Contact folders**.

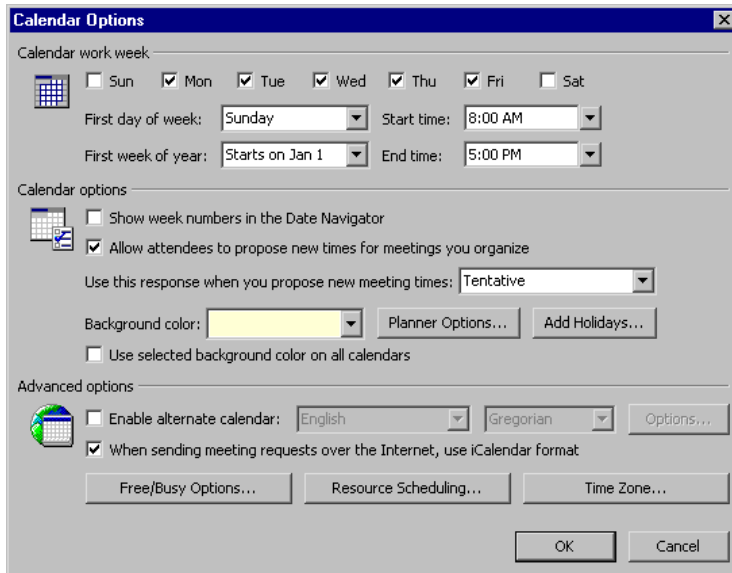
- Once done, click **OK** and the **Customize View** dialog box will open:



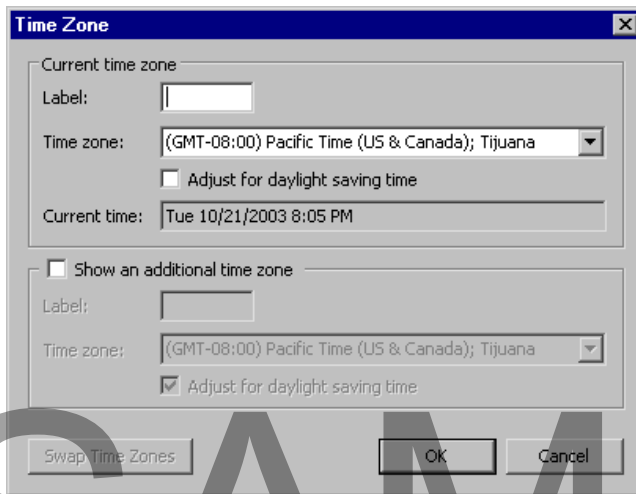
- Various settings can be modified for the view in the **Customize View** dialog box:
- **Fields** - Allows you to select fields that are displayed in the customized view.
- **Group By** - Allows you to group items in any order.
- **Sort** - If available, allows you to sort items.
- **Filter** - Allows you to select certain items to be filtered by conditions in order to be seen within the view.
- **Other Settings** - Sets fonts and any other available settings.
- **Automatic Formatting** - If available, allows you to automatically set defined fonts for specific messages.
- **Format Columns** - Allows you to format the columns.

Adding Additional Time Zones

- Open the **Calendar** pane, by clicking on the **Calendar** icon in the Navigation Pane, or in the list of folders.
- From the main menu, choose **Tools > Options** to open the **Options** dialog box.
- In the **Preferences** tab in the **Calendar** section, click the **Calendar Options** button to open the **Calendar Options** dialog box:



- In the **Advanced options** area, click the **Time Zone** button to open the **Time Zone** dialog box:



- Select the **Show an additional time zone** check box to have a second time zone appear beside the main time zone in the **Calendar** pane:



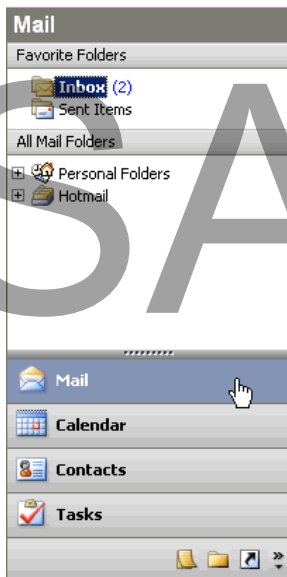
The Navigation Pane

Using the Navigation Pane

- The **Navigation Pane** is new to Outlook 2003 and replaced the Outlook Bar from previous versions of Outlook. The **Navigation Pane** area holds the **Mail**, **Calendar**, **Contacts**, **Tasks**, **Notes**, **Folder List** and **Shortcuts** icons.

Using the Mail button

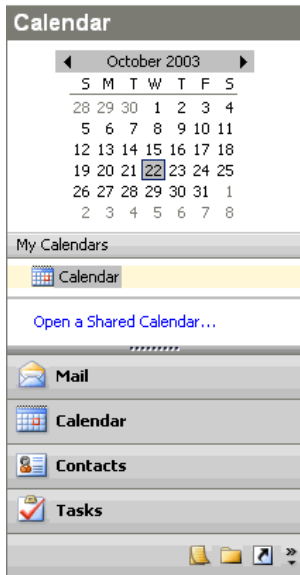
- By clicking on the **Mail** button, your mail folders are made visible in the Navigation Pane:



SAMPLE

Using the **Calendar** button

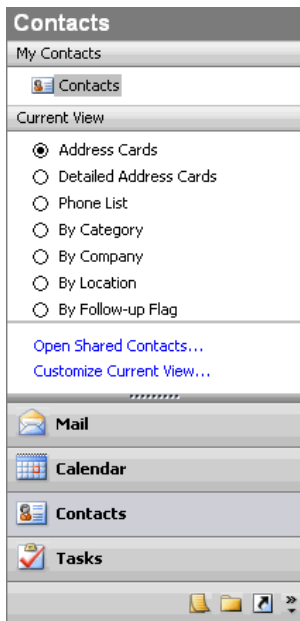
- By clicking on the **Calendar** button, the current month is displayed as well as buttons to access all available calendars and open a shared calendar:



Using the **Contacts** button

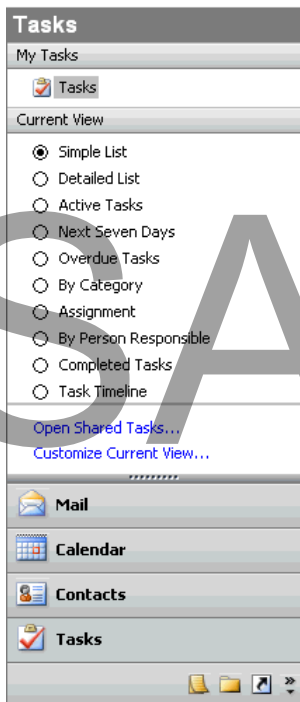
- By clicking on the **Contacts** button, you have a number of different options available to you. You can select the group of contacts you wish to see, the **View** you would like to see them in, as well as options to **Open Shared Contacts** and **Customize Current View**:

SAMPLE



Using the Tasks button

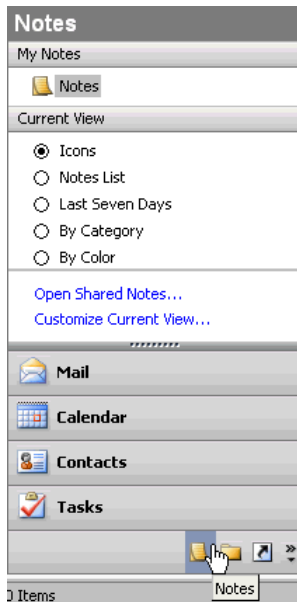
- By clicking on the **Tasks** button, you can select which view you would like to see them in, as well as options to **Open shared tasks** and **Customize Current View**:



SAMPLE

Using the Notes button

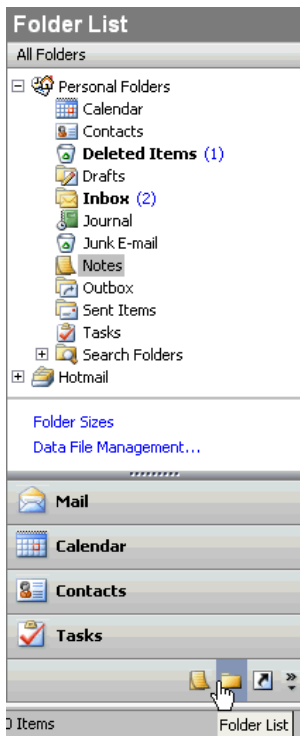
- By clicking on the **Notes** button at the bottom of the Navigation Pane, you can select the view you wish to see your notes in as well as choose to **Open Shared Notes** and **Customize Current View**:



Using the Folder List button

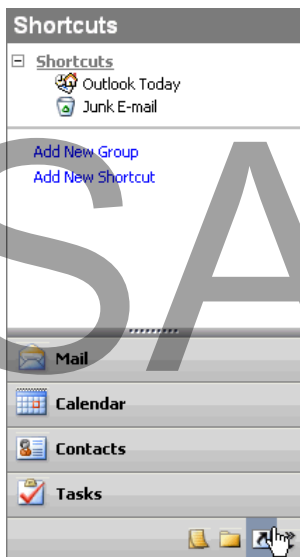
- By clicking on the **Folder List** button, all the folders available in Outlook are displayed as well as options for **Folder Sizes** and **Data File Management**:

SAMPLE



Using the Shortcuts button

- By clicking on the **Shortcuts** button, all your shortcuts are displayed as well as options for **Add New Group** and **Add New Shortcut**:



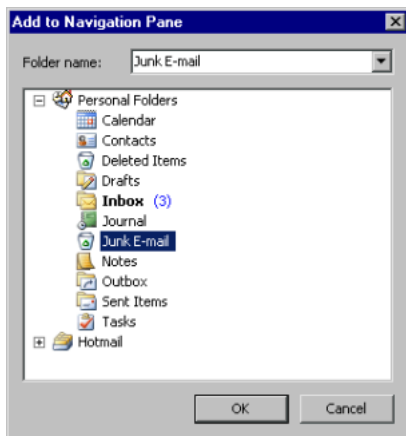
SAMPLE

Adding New Shortcuts

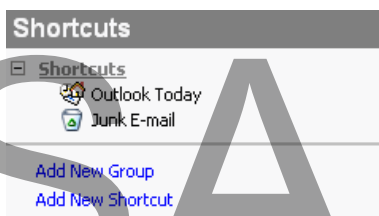
- New shortcuts can be created by clicking on the **Shortcuts** icon at the bottom right corner of the Navigation pane.
- Click on **Add New Shortcut**:



- This will open the **Add to Navigation Pane** dialog box:



- Select the folder you would like to add and click **OK**.
- The new shortcut will now be listed:



Review Questions

How would you:

- Use the Main Menu?
- Use the Standard Toolbar?
- Use the Advanced Toolbar?
- Use the Navigation Pane?

- Use the Office Assistant?
- Customize Outlook Today?
- Customize a Toolbar?
- Create a New Toolbar?
- Create a Custom View?
- Add Time Zones?
- Use the Navigation Pane?

SAMPLE

The Toolbars

When you have completed this learning module you will have seen how to:

- Use the Standard Toolbar
- Use the Outlook Today Toolbar
- Use the Plain Text Message Toolbar
- Use the HTML Message Toolbar
- Use the Rich Text Message Toolbar
- Use the Advanced Toolbar

The Standard Toolbar

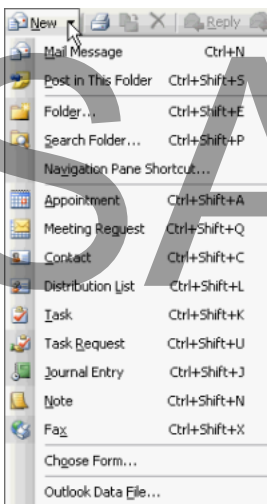
Using the New Pull-down Menu

There are two ways that the New menu button can function

- Place the cursor over the button, and click to create a new message:



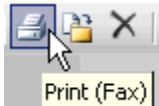
- Click on the arrow beside the button to open the drop-down menu:



- From this menu, any item can be created: Messages, Folders, Search Folders, Navigation Pane Shortcut, Appointments, Meeting Requests, Contacts, Distribution Lists, Tasks, Task Requests, Journal Entries, Notes, Fax and Forms.

Using the Print button

- The **Print** button allows you to print messages, attachments, calendars and tasks – anything that is displayed in the main viewing area:



Using the Move to Folder button

- The **Move to Folder** button allows you to instantly move a selected message between various folders:



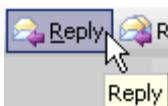
Using the Delete button

- The **Delete** button easily removes any selected item from a message or task to a calendar item:



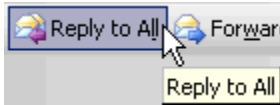
Using the Reply button

- The **Reply** button allows you to instantly create a reply message for a message selected from the **Inbox Information** view without having to open it:



Using the Reply to All button

- The **Reply to All** button allows you to instantly create a reply message to all recipients addressed in the original message without having to open it:



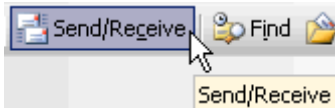
Using the Forward button

- The **Forward** button allows you to instantly create a forwarding message to another recipient without having to open it:



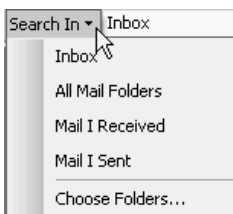
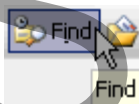
Using the Send and Receive button

- The **Send/Receive** button allows you to instantly refresh any mail being sent, or any mail coming in:



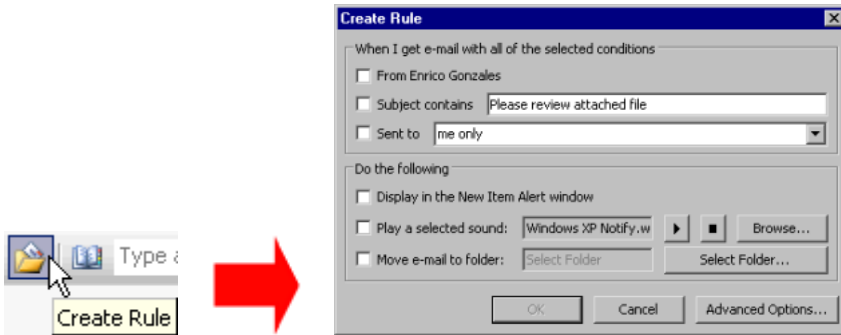
Using the Find button

- The **Find** button allows you to search for a message by contact name, content, or from any area where messages may be held:



Using the Create Rule button

- The **Create Rule** button opens the **Create Rule** dialog box where you can set conditions and display options:



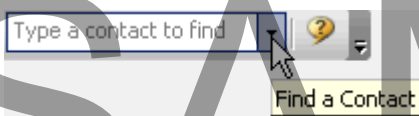
Using the Address Book button

- The **Address Book** button opens the Address book so you can search for and select a contact name:



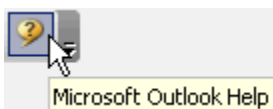
Using the Find a Contact field

- The **Find a Contact** field allows you to enter a contact name, and open the contact's information dialog box:



Using the Help button

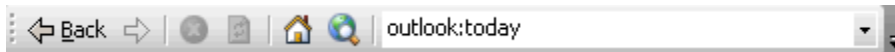
- The **Help** button instantly opens the **Microsoft Outlook Help** pane:



The Outlook Today Toolbar

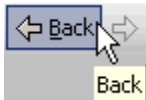
Using the Outlook Today Toolbar

- When **Outlook Today** is open in the main viewing area, it has its own toolbar functions:



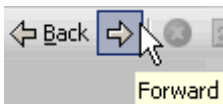
Using the Back button

- The **Back** arrow button acts like an Internet application back button, allowing you to move back to past views as required:



Using the Forward button

- The **Forward** arrow button acts like an Internet application forward button, allowing you to move forward to a page after moving back from it. This button only becomes available once the Internet has been launched within the Outlook main viewing area, and the **Back** button has been used:



Using the Web Search Feature

- The **Web Search** feature and field acts as an Internet launcher. Any web application integrates with **Outlook**, so the web and any web pages can be accessed through **Outlook**.
- Either type a web page address, or select the arrow at the end of the field to open the drop-down menu containing a list of previously viewed sites:



Using the Stop button

- The **Stop** button acts like an Internet application stop feature. When selected, the search for a page is stopped instantly:



Using the Refresh button

- The **Refresh** button acts like an Internet application refresh feature. When selected, the current page will refresh itself if necessary:



The Message Toolbars

Using the Message Toolbars

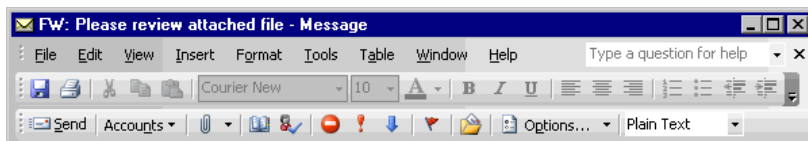
- All Message boxes also have a toolbar that can be used to alter the text within the message box. The toolbars for **Plain Text** messages, **HTML** messages, and **Rich Text** messages allow different capabilities. The main menu bar in a message box remains the same for all three formats. You can select the message format by selecting **HTML**, **Rich Text** or **Plain Text** from the **Message Format** drop down menu on the email toolbar:



NOTE: You must check the **Use Microsoft Office Word 2003 to edit e-mail messages** option in the **Mail Format** tab of the **Options** dialog box for these options to be available

Using the Plain Text Message Toolbar

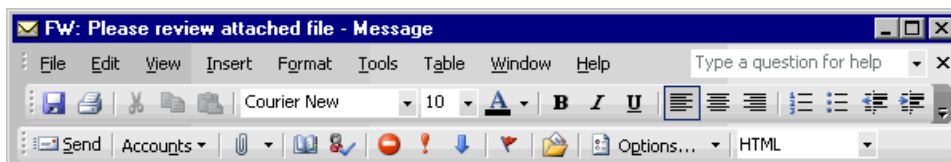
- A **Plain Text** message toolbar has only basic capabilities available:



- Only the basic toolbar shortcuts are available: Save, Print, Send, Accounts, Insert File, Address Book, Check Names, Permission, Importance, Message Flag, Create Rule, Options and Message Format. Advanced editing or style cannot be applied to the message text.

Using the HTML Message toolbar

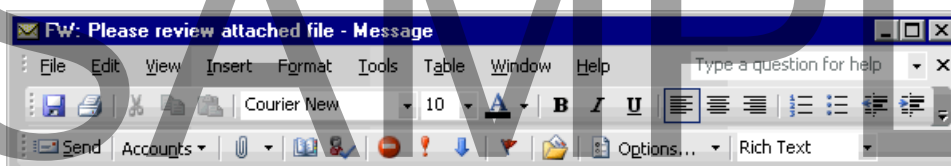
- An **HTML** message toolbar has all editing capabilities available to use:



- **Paragraph** style, including header and titles, can be inserted; **Fonts**, **Font Size** and **Color** can be set. **Alignment**, **Spacing** and **Horizontal Bar** insertion can all be applied to the HTML message text.

Using the Rich Text Message toolbar

- A **Rich Text** message toolbar has most of the same capabilities as an HTML message:



- The only difference is that **Paragraph** style with headers and titles cannot be inserted, and **Horizontal Bars** are also not available for a **Rich Text** message.

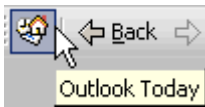
The Advanced Toolbar

Using the Advanced Toolbar

- The **Advanced Toolbar** holds more icon shortcuts to actions, located in the main menu of Outlook.

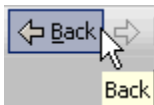
Using the Outlook Today button

- The **Outlook Today** button allows you to quickly open the Outlook Today pane in the main viewing area:



Using the Back button

- The **Back** arrow button allows you to move back from the current view in the viewing area to the preceding view:



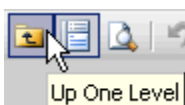
Using the Forward button

- The **Forward** arrow button is active when using an Internet application through Outlook, allowing you to move forward to pages already viewed:



Using the Up One Level button

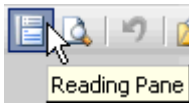
- The **Up One Level** button allows you to move up through the list of folders, even if the Folder List bar is not open:



SAMPLE

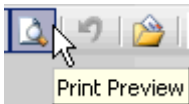
Using the Reading Pane button

- The **Reading Pane** button allows you to quickly open or close the **Reading Pane**:



Using the Print Preview button

- The **Print Preview** button allows you to open the **Print Preview** dialog box and view the selected item in the Information view that is to be printed:



Using the Undo button

- The **Undo** button allows you to undo message deletions, without having to go into the **Deleted Items** folder, finding the item, and dragging it out:



⚠ Using the Rules and Alerts button

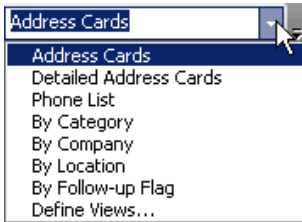
- The **Rules and Alerts** button replaced the Rules Wizard button in earlier versions of Outlook.
- The **Rules and Alerts** button allows you to quickly open the **Rules and Alerts** dialog box:



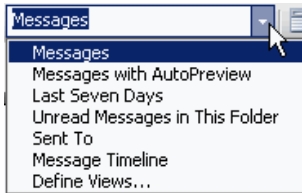
Using the Current View field

- The **Current View** field allows you to sort how items are viewed.
- If in a message folder, you can define how the messages should appear: by date, sender name, and more.

- For example, if you are in the **Contacts** view, contacts can be sorted by name, phone number, and more:



- With the **Message Information** view:



- With the **Calendar Information** view:



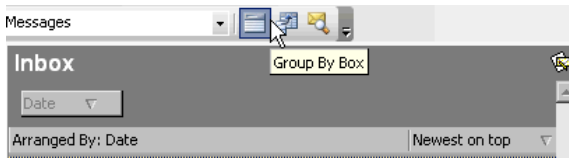
Using the Group By Box button

- The **Group By Box** button allows you to group emails by sender name, by subject heading, date received, and more:

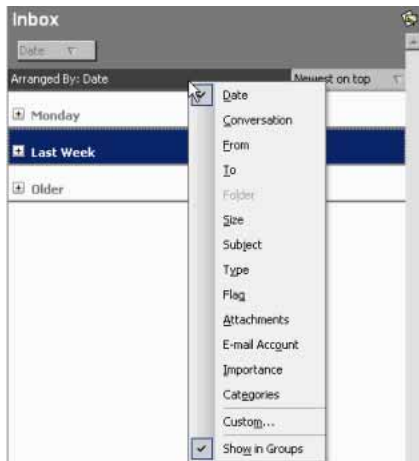


To Group By Box messages:

- Click on the **Group By Box** button in the **Advanced** toolbar.
- A gray editing space will appear above the message information headers in the **Folder Pane** view that indicates how the messages are grouped:



- Click on **Arranged By** to show a drop down menu of grouping choices:



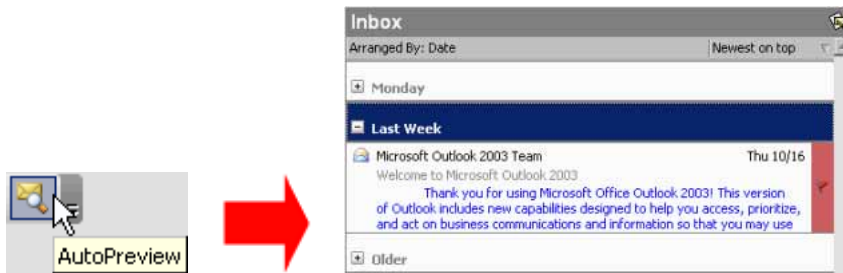
- All messages below the header line will now be grouped according to the header selected.
- **Select the +** (plus sign) button at the beginning of a group to expand and view all messages contained:



- To remove the grouping, simply click on **Arranged By** and deselect **Show in Groups**. Click on the **Grouping By Box** button again to remove the gray space above the header.

Using the AutoPreview button

- The **AutoPreview** button allows you to quickly open the **AutoPreview** function:



Review Questions

How would you:

- Use the Standard Toolbar?
- Use the Outlook Today Toolbar?
- Use the Plain Text Message Toolbar?
- Use the HTML Message Toolbar?
- Use the Rich Text Message Toolbar?
- Use the Advanced Toolbar?

SAMPLE

Mail

When you have completed this learning module you will have seen how to:

- Create Messages
- Set Message Formats
- Attach Files to a Message
- Use Rules
- Use the Rules and Alerts Dialog Box
- Add a Signature to a Message
- Organize Messages with Color
- Check Spelling and Grammar
- Use Message Stationery
- Customize Stationery
- Modify Message Formats
- Modify Settings
- Modify Delivery Options
- Open and Read a Message
- Open an Attachment
- Save an Attachment
- Reply to Messages
- Forward Messages
- Select Message Recipients
- Mark Messages as Unread
- Use the Reading Pane Options
- Mark Messages as Read
- Mark all Messages as Read
- Recall a Message
- Delete a Message

Creating Messages

SAMPLE

Creating a Message

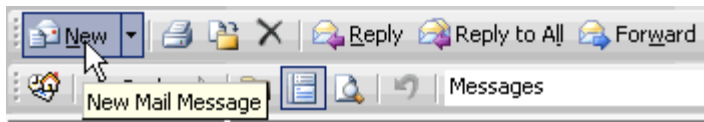
- You can create general messages with attachments in **Outlook**, and from within other **Microsoft Office** programs.

For Example: Using **Word** to send a message allows you to use the capabilities within **Word**, (like justification and borders) that are not available through **Outlook**. Sending email messages through **Word** is practical when a current

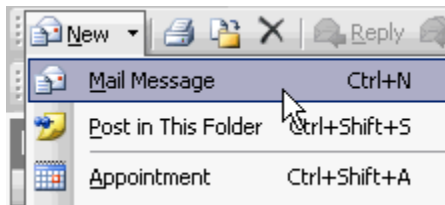
document needs to be sent. Rather than moving between applications, it can be more convenient to send via **Word**.

To create a new mail message using Outlook:

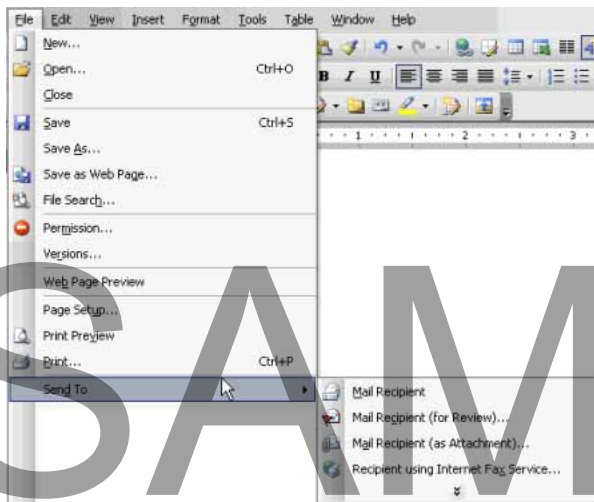
- Click the **New** button in the **Outlook** toolbar to open a new message box:



OR click on the arrow beside the **New** button to open the full drop-down menu, and select **Mail Message**:



- To use **Word** for sending an email, open Word and choose **File > Send To** from the main menu, and select the required destination:



Setting Message Formats

- The three formats that are typically used within an Outlook email:

HTML
Rich Text

Plain Text

NOTE: The default setting for Outlook messages is **HTML**.

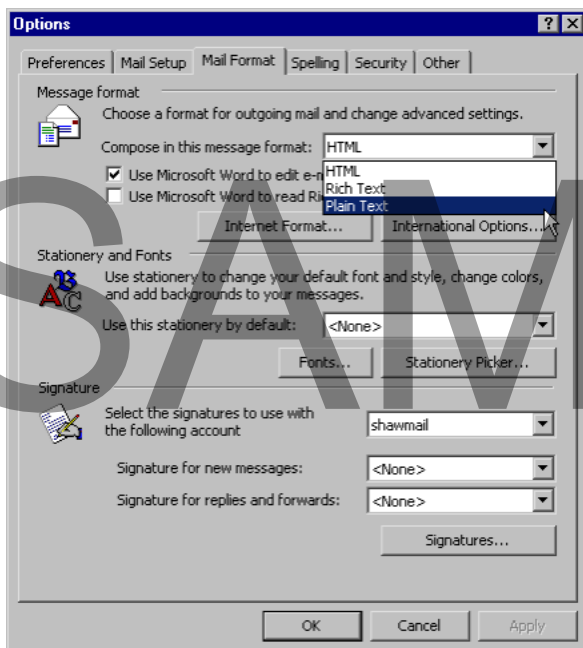
- **HTML** - Enables you to create formatted pages containing pictures, animated graphics, horizontal lines or multimedia files. A background design can also be set for the messages. However, not all email programs can read the HTML format.
- **Rich Text** - Enables you to set font, font sizes, font colors and format paragraphs. Objects and pictures can be embedded in the text. This is the standard **Exchange** format, so it can be used when **Outlook** is being used as an **Exchange** client.

NOTE: This format should not be used to send emails with attachments to anyone not using **Outlook** or **Windows Messaging**, because the attachment will not be accessible.

- **Plain Text** – Allows you to send basic emails with unformatted text in the body of the email. Files and Outlook items can be attached. This is typically the best format, as it is accessible and readable by all other email applications.

To set the Mail Format in the Mail Format dialog box

- From the main menu, choose **Tools > Options** to open the **Options** dialog box, and click on the **Mail Format** tab:



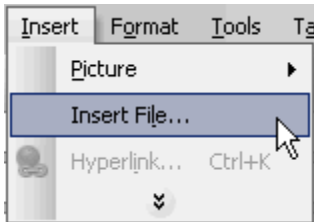
- The **Compose in this message format** drop-down field allows you to set how all messages will be formatted.

Attaching a File to a Message

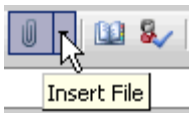
- Not only can **character sets, images, sounds and files** be attached to a message, other Outlook items can be inserted into the body of a message as well.

To attach a file to a message

- From the message's menu toolbar, choose **Insert > Insert File**:

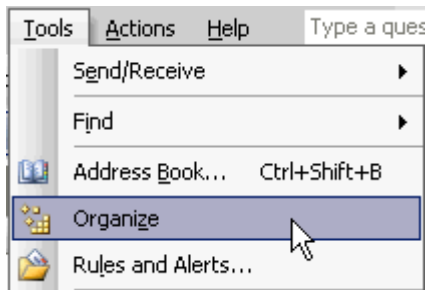


OR click on the **Paperclip** icon within the message menu bar:



Using Rules

- **Rules** consisting of actions, conditions and exceptions can be set within Outlook to shape how messages and other items are organized.
- **Actions** - Sets what a rule will do.
- **Conditions** - Sets which items the rule is applied to.
- **Exceptions** - Sets certain instances when the rule may not be applied.
- Basic rules can be created from the main menu when you are in a message folder, by choosing **Tools > Organize**:



- This will open the **Ways to Organize Inbox** area in the top portion of the **Message Information** panel:



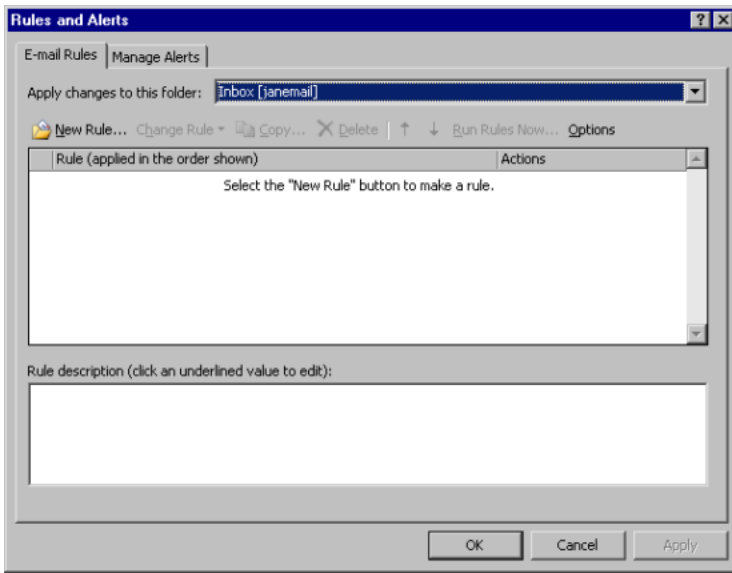
To create a simple rule

- In the first **Create a rule** field, select either **from** or **sent to**, to choose how new messages will be moved.
- In the second field, select the name of the sender that you want to apply the rule to.
- In the third field, select the folder where selected messages should be sent.

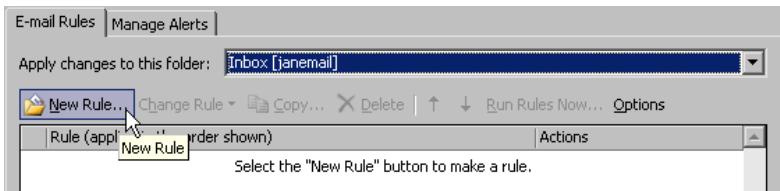
Using the Rules and Alerts Dialog Box

To create rules with the Rules and Alerts dialog box

- The **Rules and Alerts** dialog box replaces the Rules Wizard in previous versions of Outlook.
- From the main menu, choose **Tools > Rules and Alerts** to open the **Rules and Alerts** dialog box:

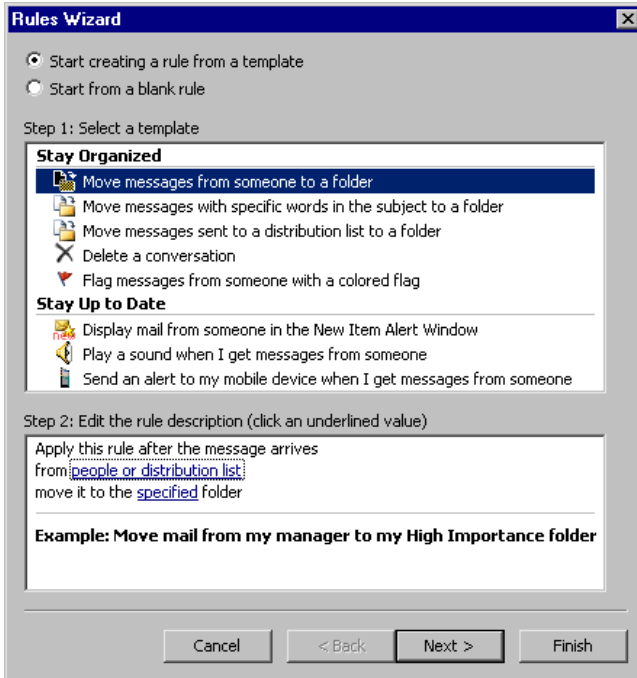


- Click on **New Rule**:

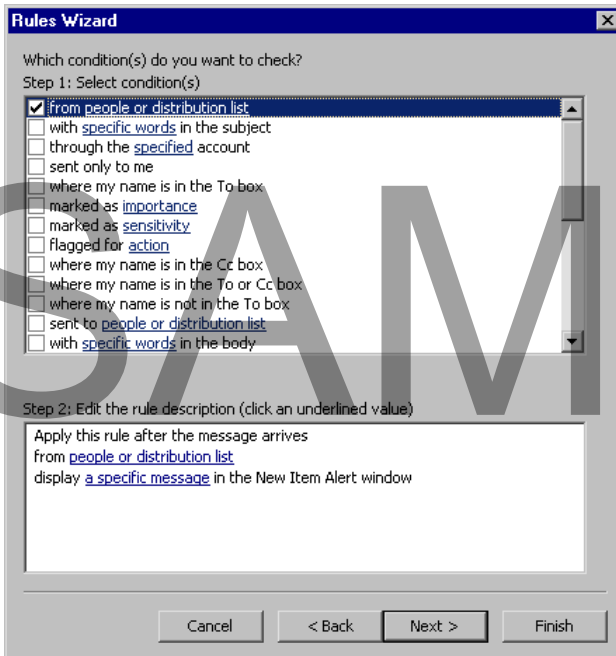


- This opens the next **Rules Wizard** dialog box, where a new rule can be created:

SAMPLE

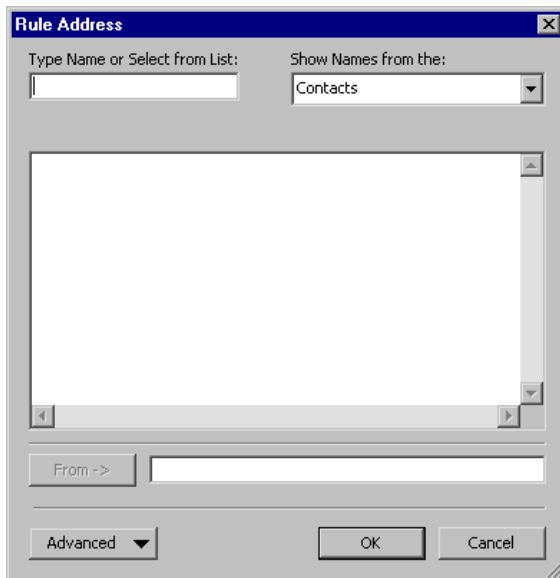


- Select the type of rule to be created from the top field. A description of the rule will show in the bottom field.
- The values that are underlined and in blue need to be set by clicking on each one and making the appropriate selection.
- Once finished, click the **Next >** button to open the next window. You'll be asked to select your choice of conditions that apply to the new rule:

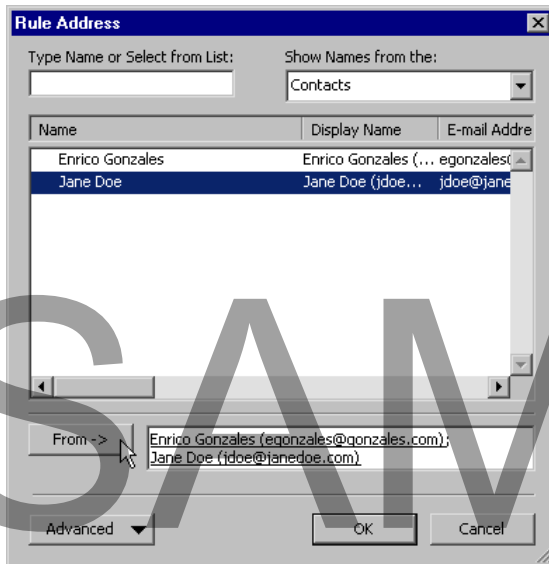


SAMPLE

- After checking the conditions for the rule in the top box, click on the first underlined words in the bottom description box. This will open a dialog box showing the contacts list:

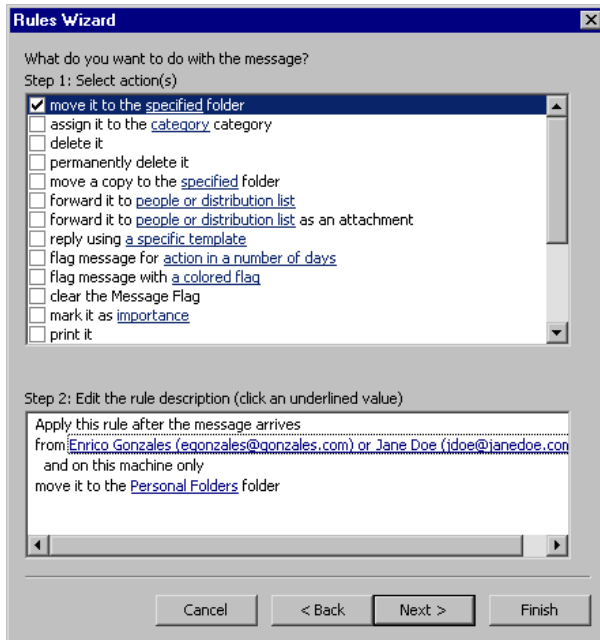


- Select a name, and click the **From** button to add it to the list field below. One or multiple names can be applied to a single rule:

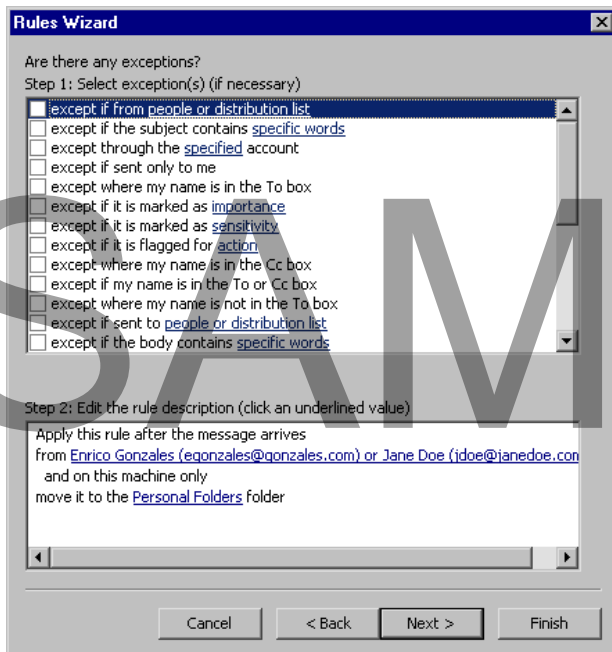


- Once all required names are selected, click **OK**.
- Select the second underlined word in the lower field of the Wizard dialog box, and Outlook will open the required list. If this is for the destination folder, select the folder where you want the email placed.
- Once the folder is selected, click **OK**.

- Once all underlined words have been filled in as required, click **Next** to open the next **Rules Wizard** dialog box:

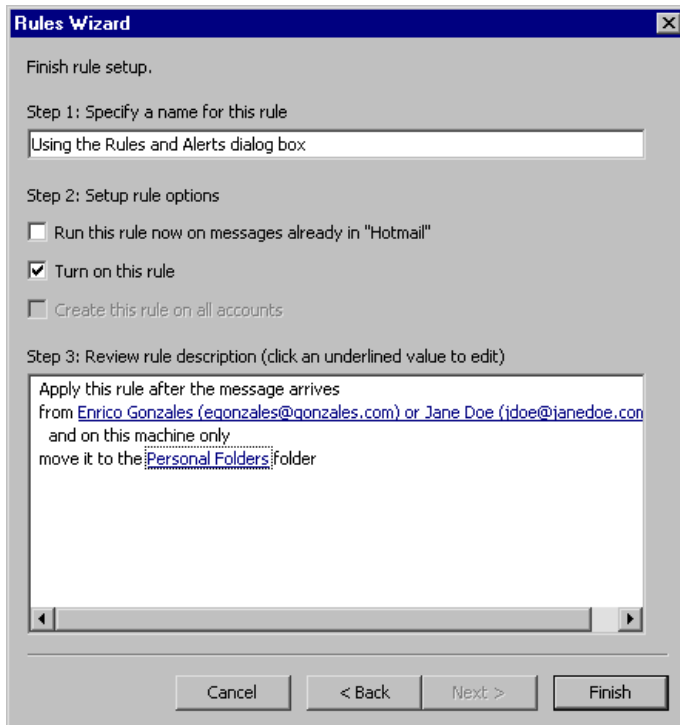


- This page allows you to set what should be done with the message. A variety of choices can be selected. The description at the bottom field in the dialog box will alter as selections are checked.
- Once finished, click **Next** to open the next **Rules Wizard** dialog box:

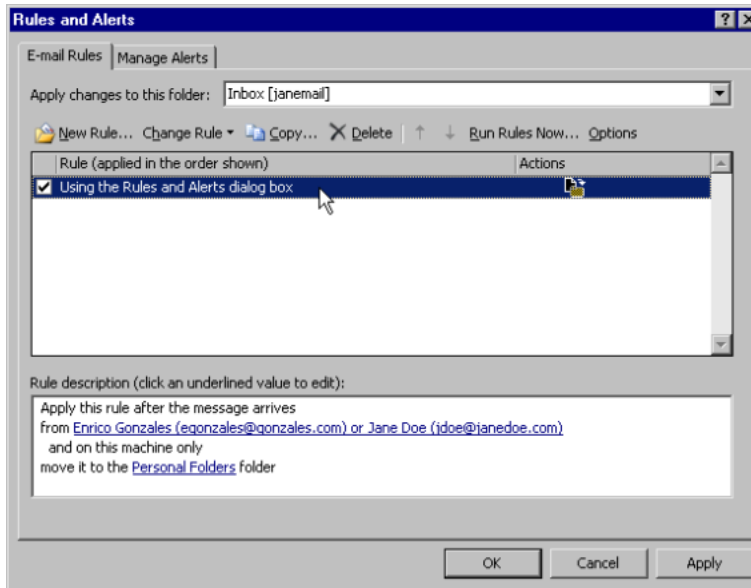


SAMPLE

- This opens the area where exceptions to the rule can be selected. You are not obligated to set exceptions. Once selected, the description of the rule will alter in the bottom field.
- If an exception has been set, select it within the bottom field, and set the necessary details about the exception.
- Once finished, click **Next** to open the last **Rules Wizard** dialog box:



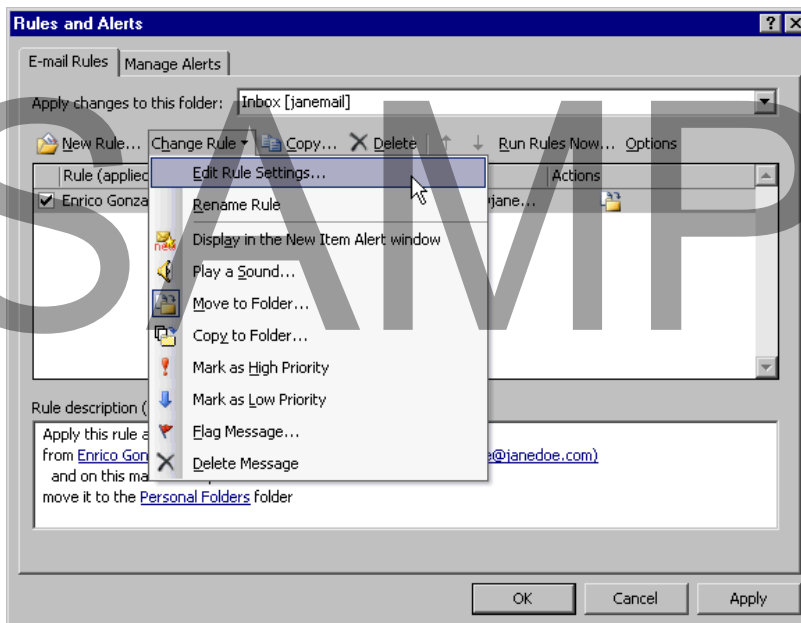
- Provide a name for the rule within the **Please specify a name for this rule** field.
- Selecting the **Run this rule now on messages already in ""** checkbox will apply the rule to any past messages in the Inbox.
- Selecting the **Turn on this rule** checkbox will apply the new rule to any new messages.
- If available, selecting the **Create this rule on all accounts** checkbox applies the rule to all available email accounts.
- Click **Finish**, and the original **Rules and Alerts** dialog box will open, showing the name and completed description of the rule:



- By selecting the checkbox beside the rule name in the **Rule (applied in the order shown)** field, the rule will be applied. If not selected, the rule will not be applied to any messages.

To modify a rule

- From the main menu, choose **Tools > Rules and Alerts** to open the **Rules and Alerts** dialog box.
- Select the rule you want to modify, and click the **Change Rule** button. From the sub menu, select **Edit Rule Settings**:



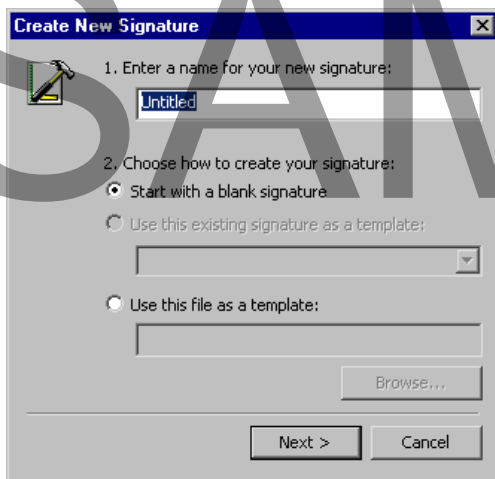
- Make any required changes and click **Next** to move to other rules within the rule set.
- Click **Finish** once the rule has been modified.

Adding a Signature to a Message

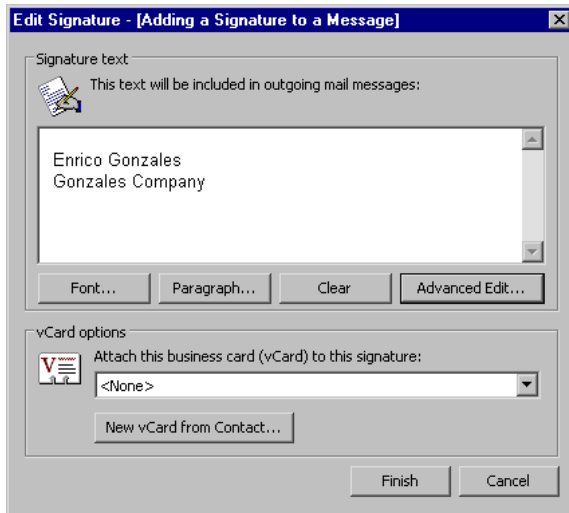
- From the main menu, choose **Tools > Options** to open the **Options** dialog box.
- Select the **Mail Format** tab.
- Select the **Signatures** button at the bottom of the tab to open the **Create Signature** dialog box.
- Click the **New** button to open the **Create New Signature** dialog box, and follow the steps to create a personal signature:



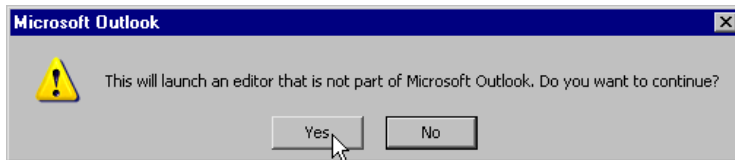
- Enter a name for the signature within the first field:



- Select the **Next** button.
- In the next step, enter the desired signature (you can include your name, title, company name, etc):



- Selecting **Advanced Edit** will open a warning dialog box:

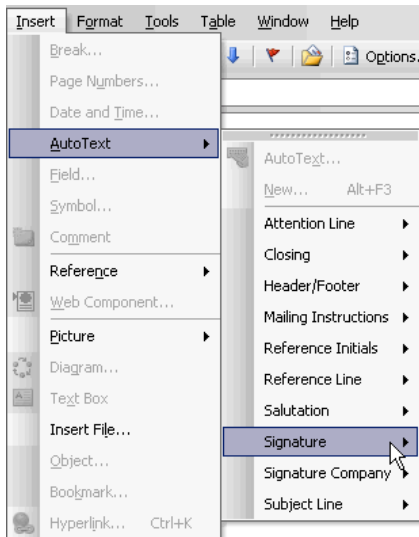


- Click **Yes**.
- This will open the text of the signature within a **Work Pad**. Here you can alter the font, size and color of the signature text.
- Multiple signatures can be created and saved, so a different signature can be assigned to different messages.

To apply a specific signature to a message being created

- From the message window's toolbar, select **Insert > AutoText > Signature** and select the desired signature:

SAMPLE

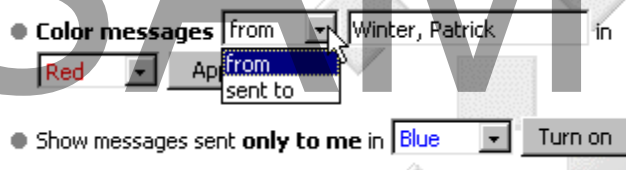


Organizing Messages with Color

- From the main menu, choose **Tools > Organize** to open the **Ways to Organize Inbox** pane within the Inbox information area of Outlook.
- On the left side of the **Organize** pane, select **Using Colors** to view the **Color** pane:



- The default setting in the first field is **from**. To have message headers colored on sent messages, select **sent to** from the drop-down menu:



- In the second field, enter the person's name whose emails will be colored.
- Select a color from the color drop-down menu:

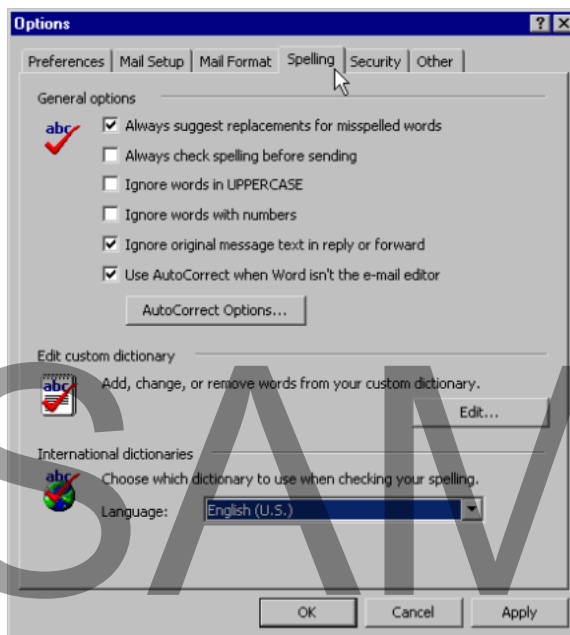


- Selecting **Apply Color** will allow the selected color to be applied to any past messages from and to the selected person in the Inbox and Sent Items folders.

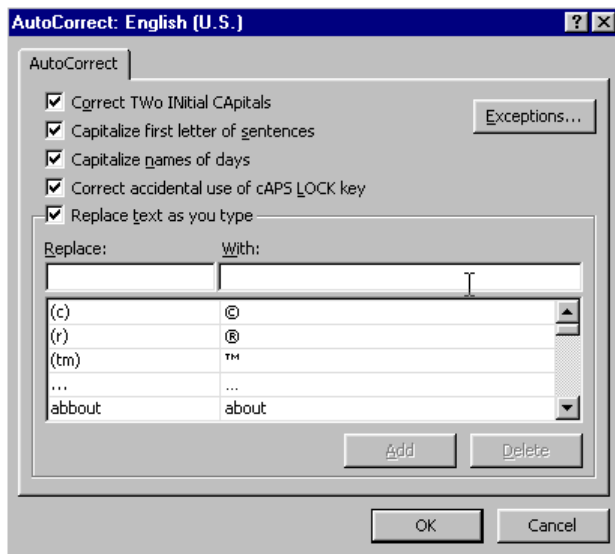
Checking the Spelling and Grammar

To set Spelling and Grammar checks

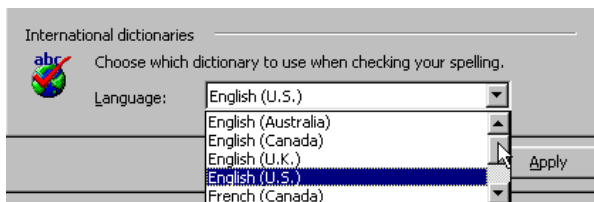
- From the main menu, choose **Tools > Options** to open the **Options** dialog box.
- Select the **Spelling** tab:



- **General Spelling Options** - These options enable you to set how the spelling and grammar check should behave. The **AutoCorrect Options** button opens the **AutoCorrect** dialog box (the same as in Word):



- **Edit Custom Dictionary** - Selecting **Edit** in this section will open a Notepad window listing words within the custom dictionary. Words can be added, removed and edited from this list.
- **International dictionaries** - By using the **Language** drop-down menu, various international dictionaries can be selected for accurate spell checking. The languages displayed are those that were selected when Office was installed:

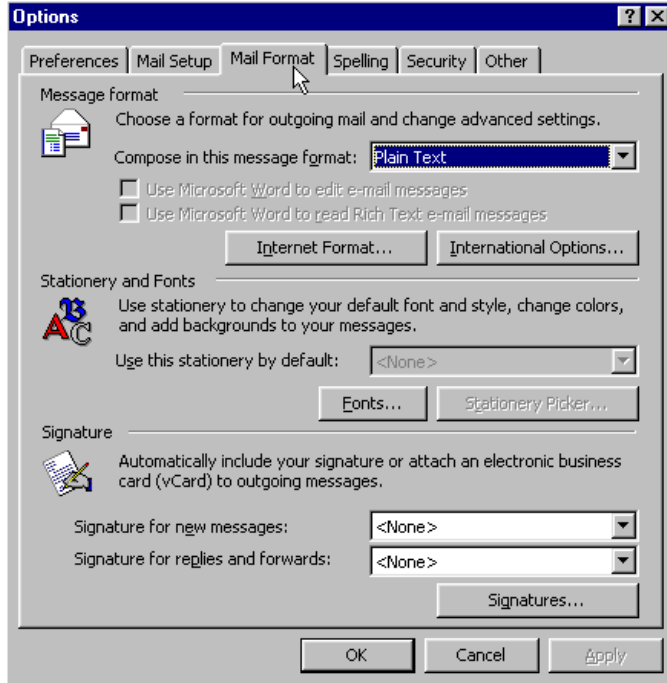


Mail Customization

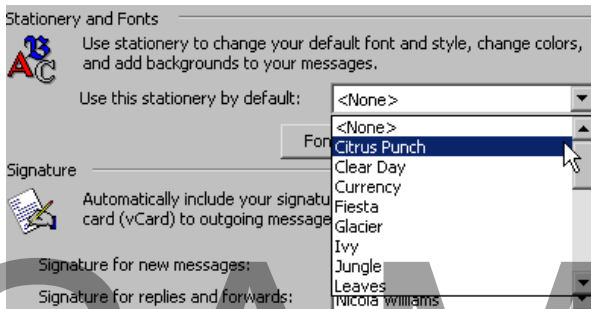
Using Message Stationery

- **Stationery settings** can only be used with messages in HTML format, although any font settings made will be used with all messages.
- From the main menu, choose **Tools > Options** to open the **Options** dialog box.

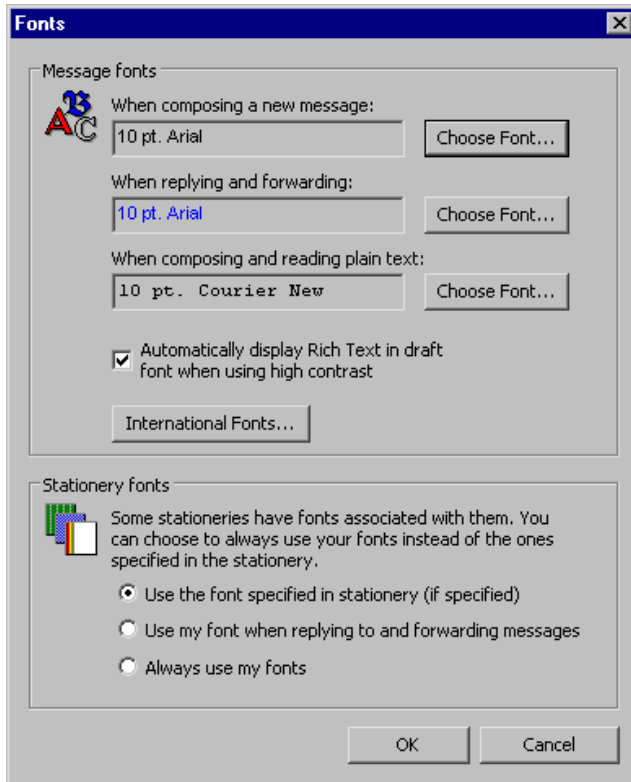
- Select the **Mail Format** tab:



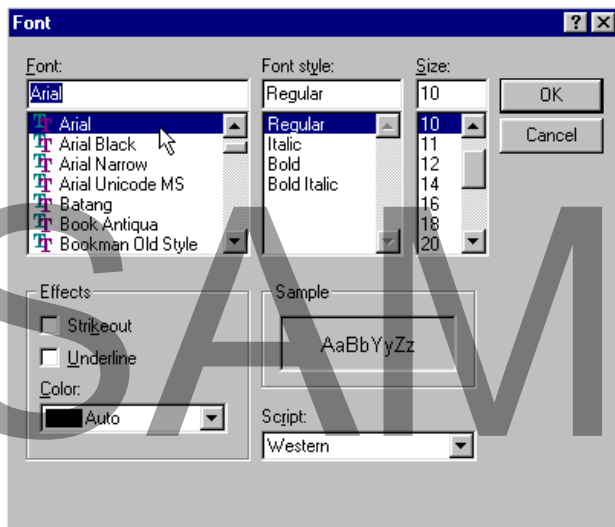
- The **Use This Stationery by default** drop-down menu allows you to choose a specific stationery to use. The default is set at **None**:



- The **Stationery Picker** button will open the **Stationery Picker** dialog box, where a list of stationeries can be selected from, and viewed in the bottom portion of the dialog box. Here it is possible to select **Edit**, **Remove** or **New** to manipulate the stationeries.
- If there is no appropriate stationery, select **Get More Stationery** and the web browser will open a Microsoft Web page where there is alternate stationery to choose from.
- When selected, the **Fonts** button will open the **Fonts** dialog box, where fonts can be selected for three separate areas, **When composing a new message**, **When replying and forwarding** and **When composing and reading plain text**:



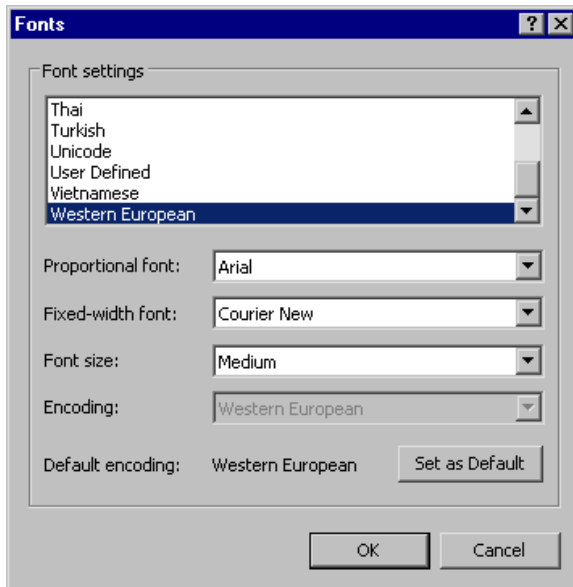
- By clicking on a **Choose Font** button, you can select the font, font style, font size, font effects and font color for specific areas of text from the **Font** dialog box:



- By having the **Automatically display Rich Text in draft font when using high contrast** checkbox selected, you can make messages easier to read on smaller monitors. Though the default setting is to have this checkbox selected, it can be deselected:



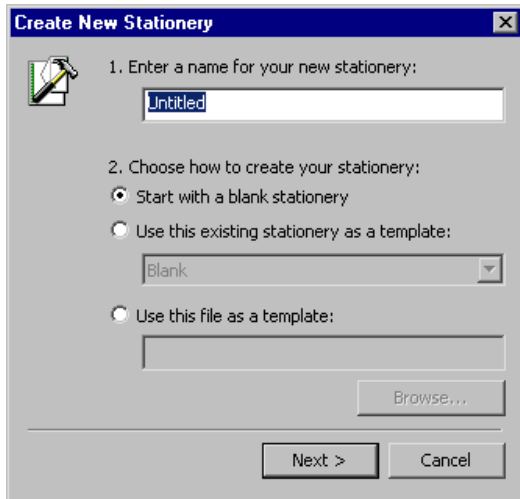
- Selecting the **International Fonts** button will open the **Fonts** dialog box, where a default font language can be selected:



Customizing Stationery

To create new stationery

- From the main menu, choose **Tools > Options** to open the **Options** dialog box.
- Select the **Mail Format** tab.
- If available, click on the **Stationery Picker** button.
- Click on the **New** button.
- Select the desired options in the **Create New Stationery** dialog box:

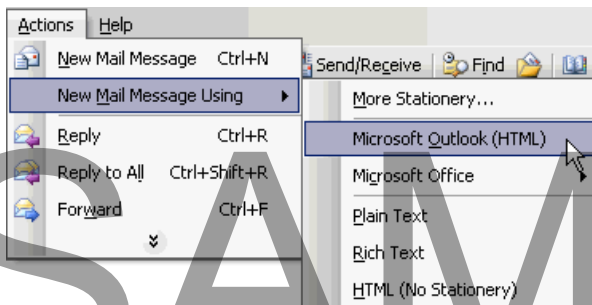


- Click **Next** to open the **Edit Stationery** dialog box to select various options.
- Click **OK** to save the changes and return to the **Stationery Picker** dialog box.

Modifying Message Formats

To alter the format for a message about to be created

- From the main menu, choose **Actions > New Mail Message Using** and select a new **Format** from the list provided:



- **More Stationery** - Will show a list of stationeries to select for this specific email.
- **Microsoft Word (HTML)** - Will create the message using the HTML format that can be used with stationery.
- **Microsoft Office** - Will create the message either as an **Access** data page, **Excel** spreadsheet, or a **Word** document. This allows you to open any of the applications to create the document within Outlook.
- **Plain Text** - Will create the message in the **Plain Text** format.
- **Rich Text** - Will create the message in the **Rich Text** format.

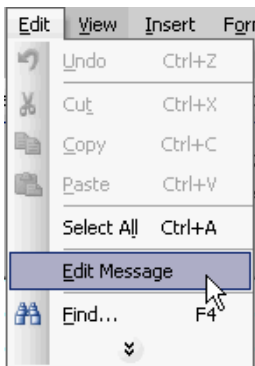
- **HTML (No Stationery)** - Will create the message using the HTML format without stationery.

To alter the format for a message already sent

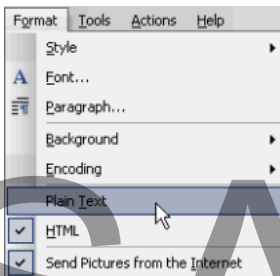
- Open a message from the **Sent Items** box.

NOTE: The sent message has to already be in a rich text or a Plain text format prior to editing for the menu selection to present all three formats.

- In the menu bar of the Sent message, choose **Edit > Edit Message:**



- Choose **Format** and select from **Plain Text**, **HTML** or **Rich Text** to alter the message's format:

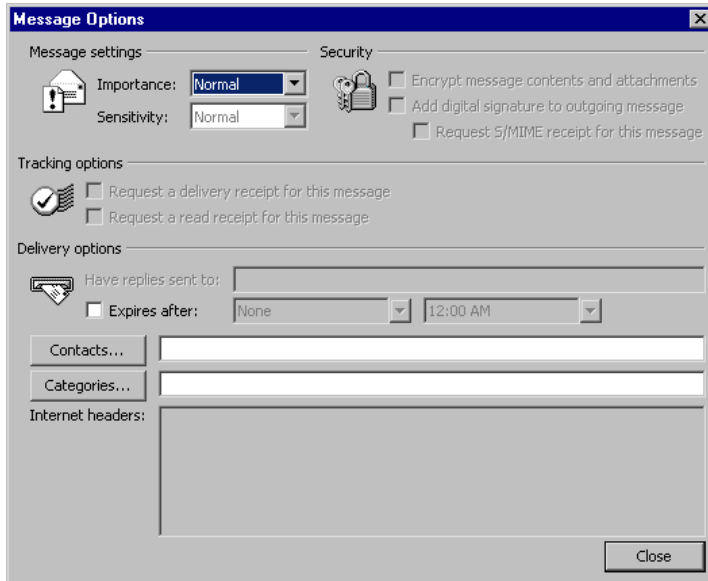


Modifying the Settings

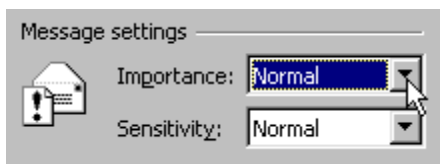
- The best method to alter any setting is through the **Options** dialog box.
- From the main menu, choose **Tools > Options** to open the **Options** dialog box.
- Select from the **Preferences**, **Mail Setup**, **Mail Format**, **Spelling**, **Security** and **Other** tabs to locate which settings need to be altered, and alter as required.

Modifying Delivery Options

- The delivery options of a message can be altered while creating the message.
- Open a sent item. From the message's menu bar, choose **View > Options** to open the **Message Options** dialog box:



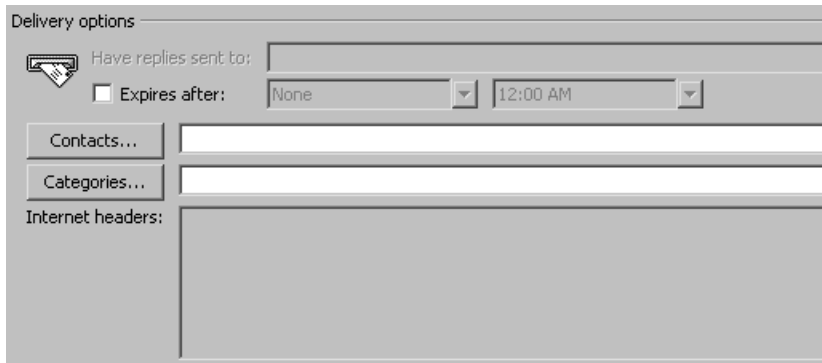
- The **Message Settings** area allows you to set the **Importance** and **Sensitivity** options for the message:



- The **Tracking options** area contains two options: **Request a delivery receipt for this message** and **Request a read receipt for this message**:



- The **Delivery options** area allows a multiple of options.
- The **Have replies sent to** field selects the recipient of the reply – yourself, or another person within the **Contact and Categories** list:



- The **Expires after** field sets the expiry for a message after a certain date if not viewed, thus removing itself from the recipients' email. If the message is viewed, then the expiry option will cease to be effective.

Opening and Replying

Opening and Reading a Message

- When a new message arrives, the header of the message will appear in bold within the **Folder** pane.
- In the **Navigation Pane**, the number of new messages appears beside the **Inbox** folder:

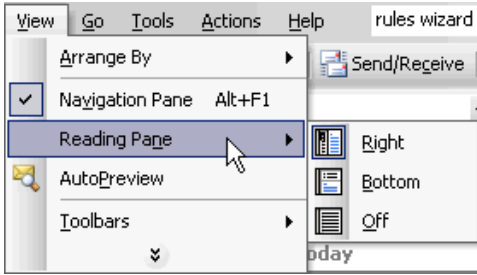


- One way to read a message is to double-click on the header line in the **Folder** pane, and the message box will open.

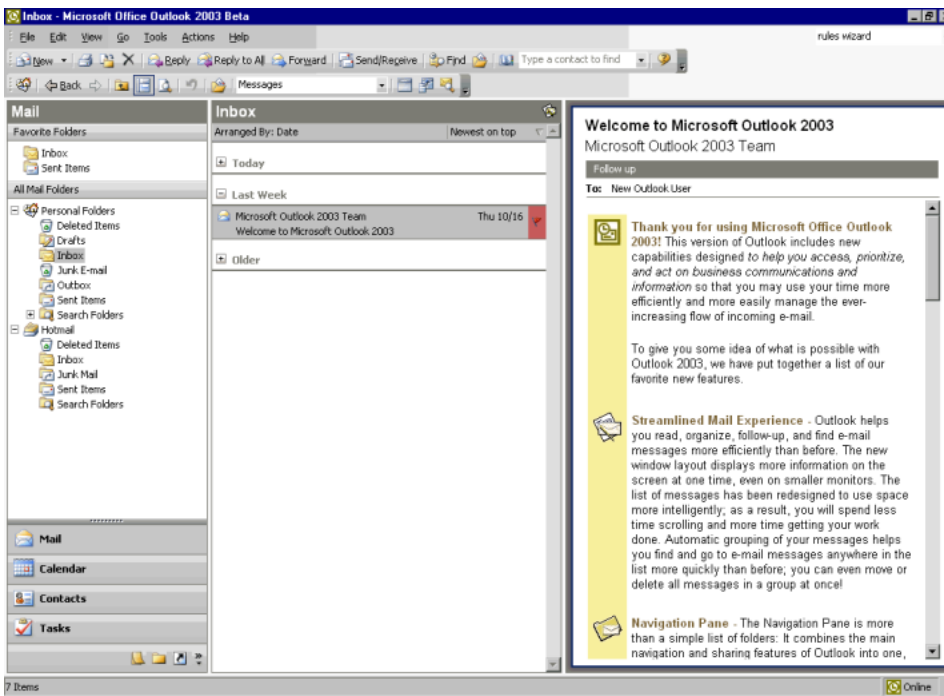
OR read the message in the **Reading** pane, which is an improved feature of Outlook 2003. It replaces the Preview pane and allows you to view up to 40% more text on the screen which aids in reading long email messages and saves on printing.

To open the Reading pane

- From the main menu, choose **View > Reading Pane** to select where you would like the reading pane placed within the Outlook window:

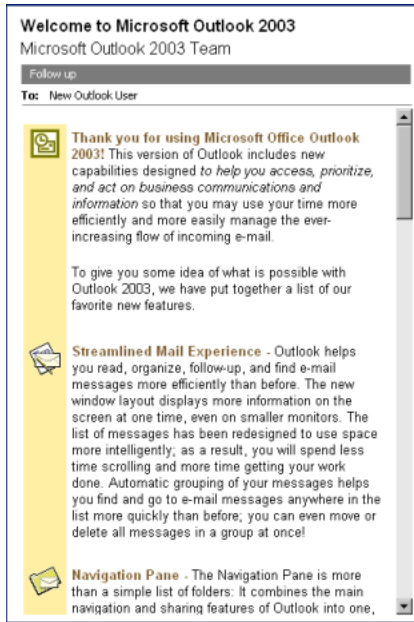


- The default setting is on the right, however, if you prefer it on the bottom (reminiscent of the preview pane), select **Bottom**. You can close it altogether by selecting **Off**:



- The message appears in full, and can be scrolled through for reading without opening the message:

SAMPLE



- For a faster, very brief look at a message, from the main menu choose **View > AutoPreview**.
- The **Folder** pane will preview the first three lines of the message under the message header:



Opening an Attachment

- If there is an attachment to the message, it is shown in three ways:
- A paperclip icon will appear to the right of the header name in the **Folder** pane:



- If the **Reading** pane is open, the attachments' names will show at the top of the pane:

Please review attached file

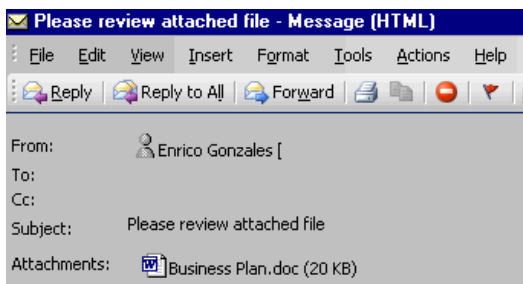
Enrico Gonzales

Follow up

To:

Attachments: Business Plan.doc (20 KB)

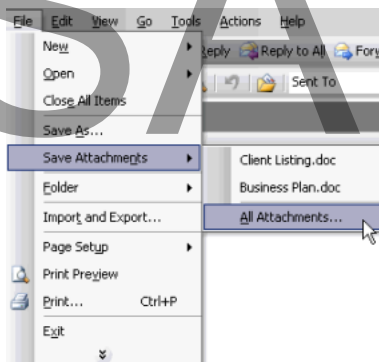
- Once the message is open, the name of the attachment is listed in the **Attachment** field at the top of the message:



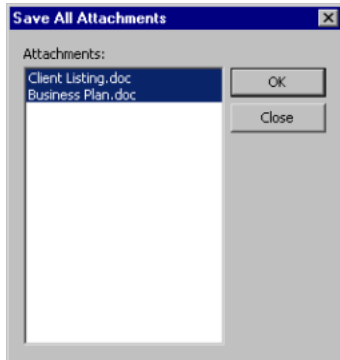
- To open the attachment, double-click on the name either in the **Reading** pane, or within the open message.

Saving an Attachment

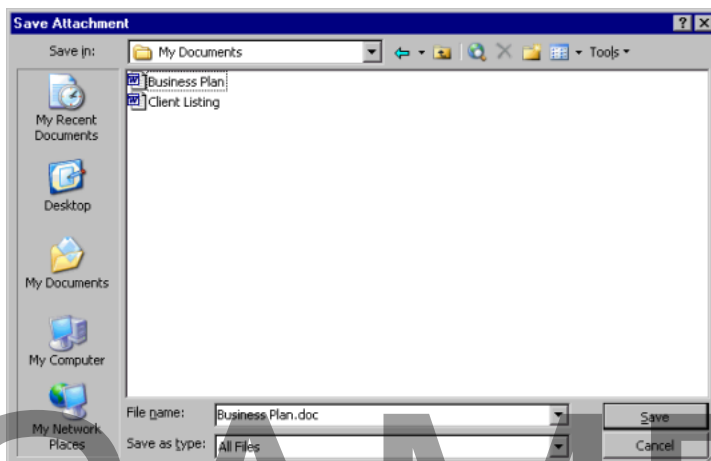
- To save attachments, first select the message in the **Folder** pane to highlight the message header.
- From the main menu, choose **File > Save Attachments**.
- If there are multiple attachments and only one needs to be saved, simply select the name of the file to save. To save all attachments with the message, select **All Attachments**:



- If the **All Attachments** option is selected, the **Save All Attachments** dialog box will open, listing the attachments to be saved. If at this point you decide that an attachment does not need to be saved, simply click on the file to deselect it:

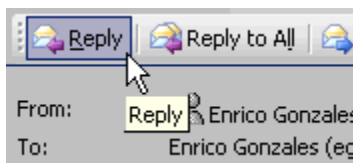


- If only one attachment is saved, and **OK** is clicked in the **Save All Attachments** dialog box, the **Save Attachment** dialog box will open. Locate the appropriate file where the attachment will be saved from the **Save In** drop-down menu. Rename the attachment, if necessary, in the **File name** field:

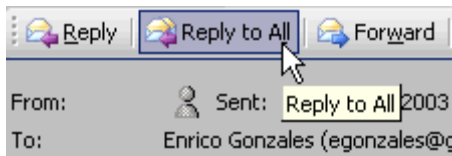


Replying to a Message

- Double-click on a message header in the **Folder** pane to open a message.
- Click on the **Reply** button in the top message box menu:

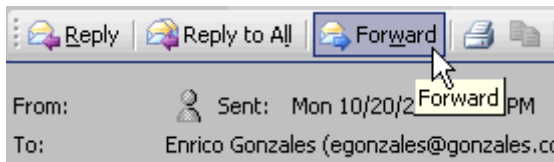


- This will open a reply message, with the sender from the original message in the **To** field.
- The **message** can be altered (even the original message) to create a smaller message to send, or for editing purposes.
- If a message was sent to multiple people, the **Reply to All** button allows you to send a reply not only to the original sender, but to all other addresses included in the original message as well:



Forwarding a Message

- Messages can also be **forwarded** to a separate contact.
- Once a message is open, click on the **Forward** button in the message's menu bar:

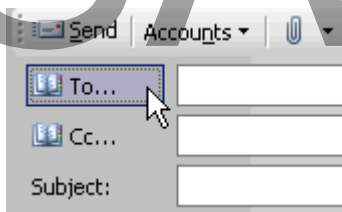


- This will create a new message box, with the original email contained in the body text. New text can be added above the original text, and the new recipient entered within the **To** field.

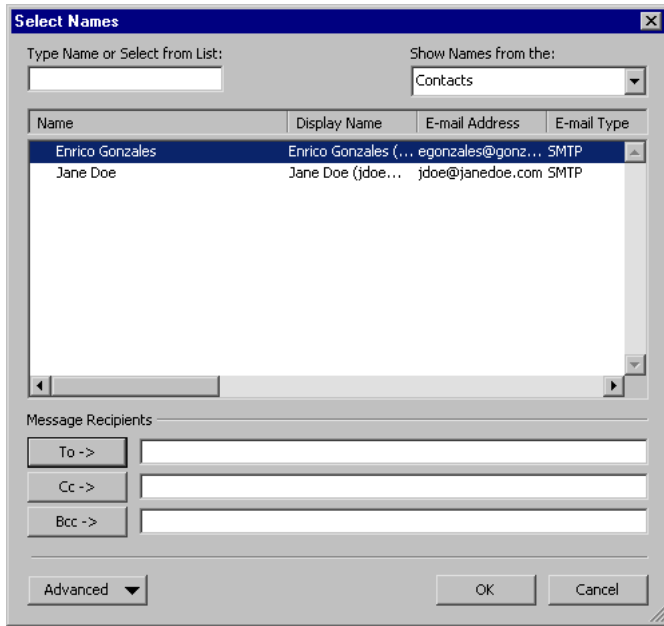
Selecting a Message Recipient

To enter an email address to send a message with different methods:

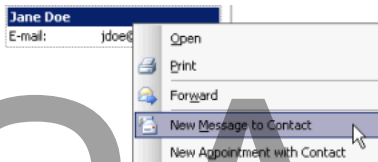
- If a new message has been created, type the email address directly into the **To** field:



OR select the **To** button to open the **Select Names** dialog box:



- Select the desired recipient name from the **Name** column, and click the **To ->** button to add the name to the **Message Recipients** area on the lower portion of the screen.
- **Contacts** can also be placed in the **CC** section, as well as the **BCC** section. By placing a recipient in the **BCC** section, their email address will not be visible to any other recipients.
- Another way to view your contacts is to click on **Contacts** in the Navigation pane to display the contacts in the Folder pane.
- Right-click on the desired contact, and select **New Message to Contact** from the pop-up menu:



SAMPLE

End of the preview sample



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