## Course Objectives:

- Outlook interface and functions: Overview and setting options
- Basics of Outlook emailing (sending, replying, forwarding, deleting messages)
- Attaching files, changing message status, tracking mail, creating folders
- Setting up and using Distribution Lists
- Recalling messages
- Out of Office Assistant

## Section 1 - Overview

Microsoft Outlook is more than just an e-mail program; it is a **Personal Information Manager** (PIM). Outlook is intended to help you organize your projects and events both at work an at home to communicate with others so that your plans may be carried out efficiently and effectively.

### *Major Functions*

Outlook is composed of **four major functions**:

1. E-Mail – the electronic mail message
2. Calendar – the on-line version of your desk calendar
3. Tasks – the “To Do” list
4. Contacts – the on-line version of your Rolodex

There are additional functions of the Microsoft Outlook Personal Information Management system, but we will focus on the four areas listed above.

# Section 2 – Opening Outlook

## *Starting the Program*

1. Click on the **Start button** at the bottom left corner of your screen and choose **All Programs / Microsoft Office / Microsoft Office Outlook 2003** (or use the **E-mail** shortcut in your Start Menu).

2. If necessary, **close** the Office Assistant. If you want to display the Office Assistant again, choose **Help / Show the Office Assistant**.

3. Examine the Outlook Window. Like other Windows-based programs, Outlook contains several standard features:

   a. **Title Bar** – contains the program name and the current function name

   b. **Menu Bar** – contains standard menu items, such as **File**, **Edit**, **Help**, etc.

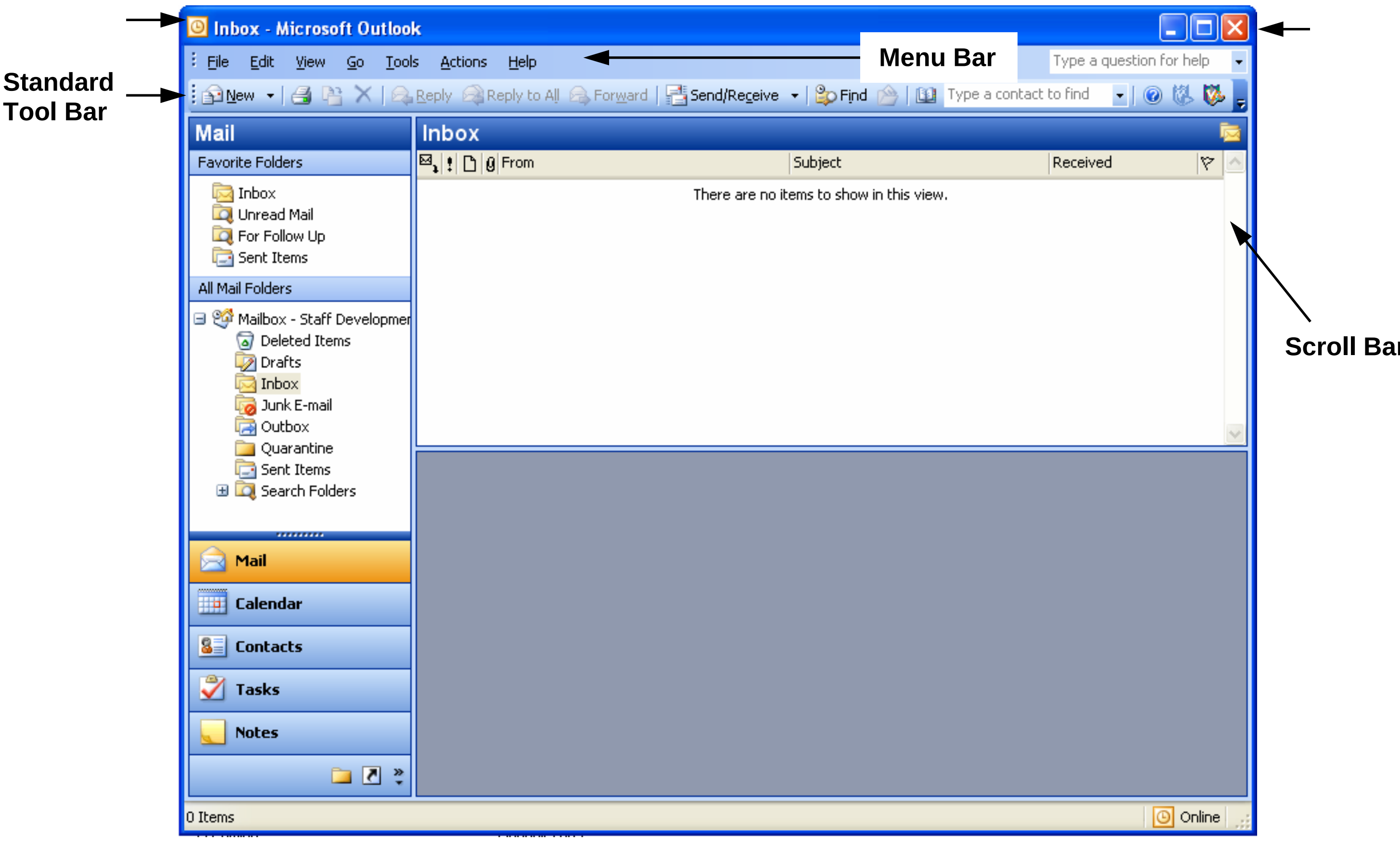
   c. **Standard Toolbar** – contains shortcut buttons to items that are also contained within menus.

   d. **Scroll buttons** (when necessary) – used to scroll horizontally and vertically when a window cannot contain all the information available.

   e. **Control buttons** – used to minimize, maximize, and close the program.

**Title Bar**

**Control Buttons**




The "**Personal Folders – Outlook Today**" view is a snapshot of 3 commonly used functions: the **calendar**, **tasks** and **email**.

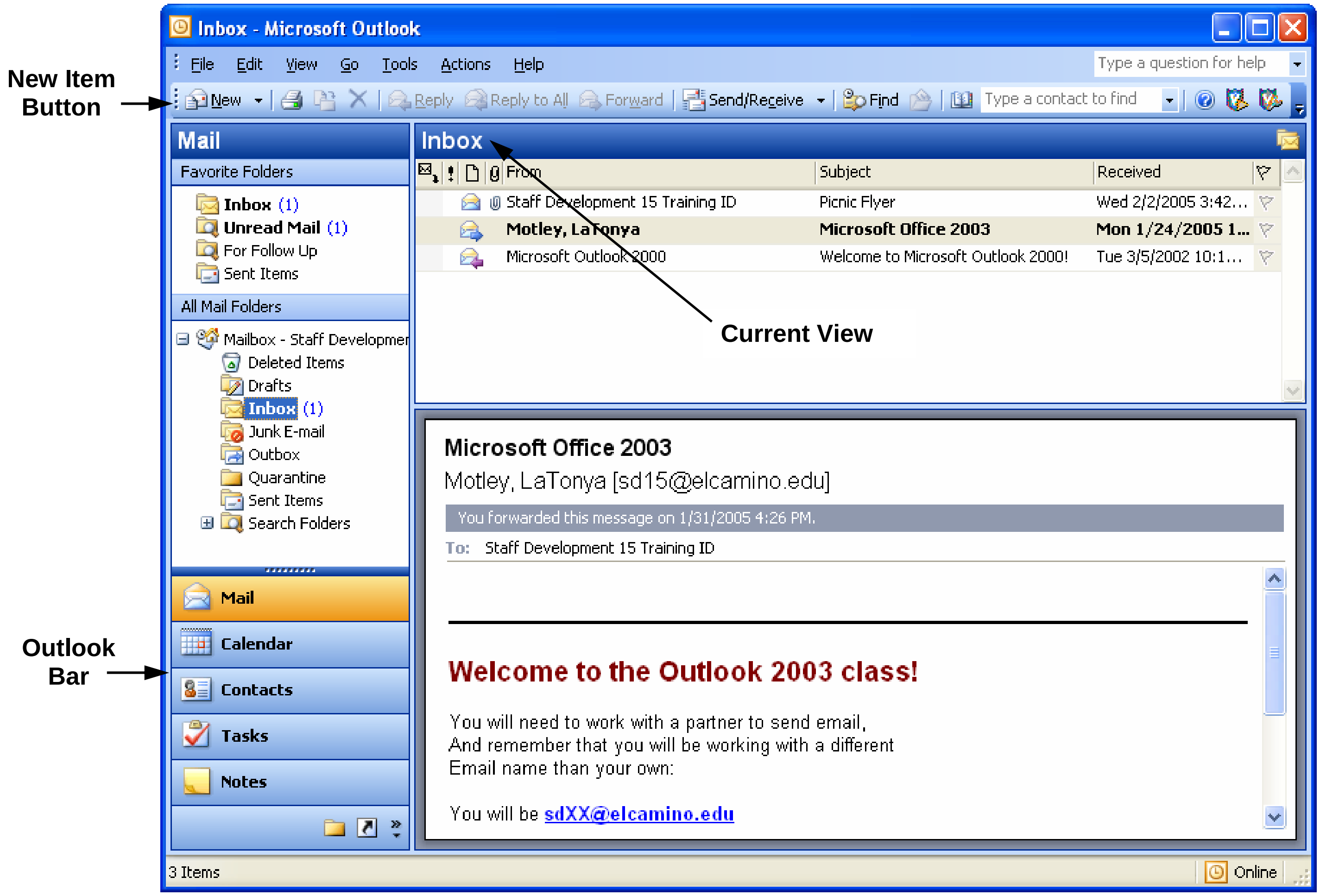
4. The Outlook Window also contains several other features specific to Outlook:

   a. Buttons in the Standard Toolbar are specific to each function in Outlook – For **E-mail**, it contains **Reply, Reply to All, Forward, Address Book**, etc.


   b. **Current View banners** – contains the name of the section (folder) being used to view and sort the information in the function. In the image below, the Current View is the "Inbox"

   c. **New Item button** – used to start the process of entering new information; this button changes depending on the function being viewed.

   d. **Outlook Bar** – contains shortcuts to all Outlook functions.


New Item Button
Outlook Bar
Current View
Inbox - Microsoft Outlook
File Edit View Go Tools Actions Help
Type a question for help
New Reply Reply to All Forward Send/Receive Find Type a contact to find
Mail
Favorite Folders
Inbox (1)
Unread Mail (1)
For Follow Up
Sent Items
All Mail Folders
Mailbox - Staff Developmen
Deleted Items
Drafts
Inbox (1)
Junk E-mail
Outbox
Quarantine
Sent Items
Search Folders
Mail
Calendar
Contacts
Tasks
Notes
Inbox
From Subject Received
Staff Development 15 Training ID Picnic Flyer Wed 2/2/2005 3:42...
Motley, LaTonya Microsoft Office 2003 Mon 1/24/2005 1...
Microsoft Outlook 2000 Welcome to Microsoft Outlook 2000! Tue 3/5/2002 10:1...
Microsoft Office 2003
Motley, LaTonya [sd15@elcamino.edu]
You forwarded this message on 1/31/2005 4:26 PM.
To: Staff Development 15 Training ID
Welcome to the Outlook 2003 class!
You will need to work with a partner to send email,
And remember that you will be working with a different
Email name than your own:
You will be sdXX@elcamino.edu
3 Items
Online

## *Viewing the Functions*

1. When Outlook is first opened, it should show the **Inbox**.

2. Click on the Calendar icon 

on the **Outlook Bar**.

   The Calendar displays. All items scheduled with the Outlook Calendar are called "**appointments**." By definition, an appointment involves meeting with another person; a "**meeting**" is simply an appointment you make with more than one other person.

3. Click on the Tasks icon 

on the **Outlook Bar**.

   The Task List displays. Similar to Calendar items, Tasks are "To Do" items that **do not involve scheduling with other people**, and thus **do not have to take place at a particular time**. Normally, tasks must simply be done by a particular date.

4. Click on the Contacts icon 

on the **Outlook Bar**.

   The Contact List displays. The contacts folder is your e-mail **address book** and **information storage** for the people and businesses you want to communicate with. Use the contacts folder to store the e-mail address, street address, multiple phone numbers, and any other information that relates to the contact, such as birthday or anniversary date.

5. Click on the Mail icon 

to return to the **Inbox**.

   ***NOTE***: As you open different functions, the New Item button changes, as do many of the other buttons on the toolbar.

## *Setting Options for your Email*

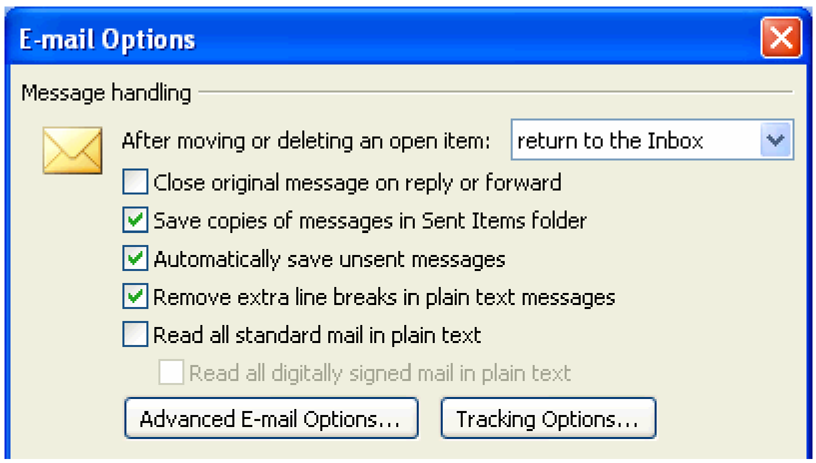
We can change how all of the sections of Outlook act by setting the options.

1. Choose **Tools / Options** on the Menu Bar.

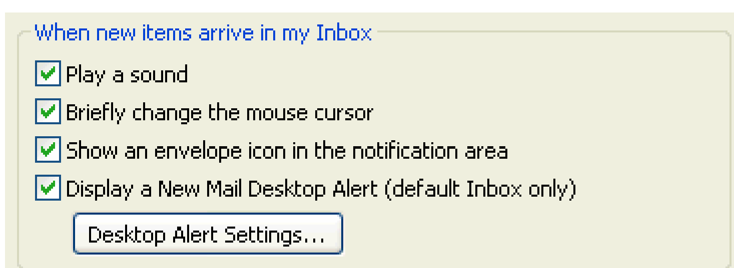
2. If necessary, click the **Preferences** tab.

3. View the various program options on the **Preferences** tab. These are all general options for each section of Outlook.

4. Click on the **E-Mail Options** button and view the options.




5. Click the **Advanced Email Options** button. Select **Display a New Mail Desktop Alert** and **Play a Sound** in the "**When new items arrive in my Inbox**" area.




6. Click the **OK** button in the **Advanced E-mail Options** box; click the **OK** button in **the E-mail options** box, and **OK** in the **Options** box to accept all changes.

### *Now we will test these settings…*

# Section 3 – Sending E-Mail Messages

## *Exchange and Networking*

Outlook uses an e-mail processing system called **Exchange**, which sends and receives messages from thousands of users and delivers them to the proper location using the e-mail address. To send and receive mail, a computer must be linked to other computers in a network. A network is a group of computers connected by cables or phone lines that allow the computers to share information and peripherals, such as printers.

The main computer that provides this capability is called the "**server**," while the computers that use the server (such as yours) are called "**clients**."

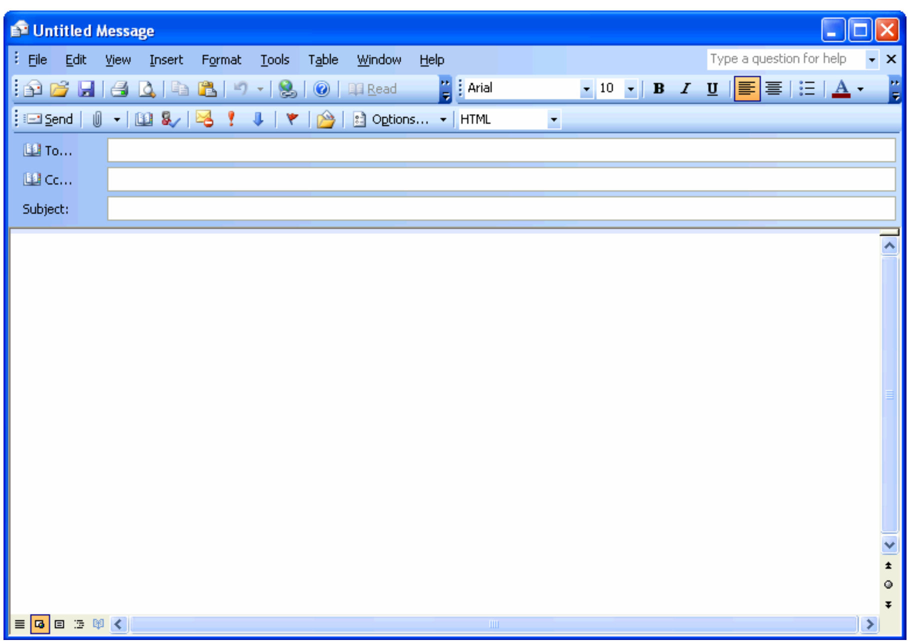
## *Creating the Message Header*

The message header is the first part of the message; it contains the To, Cc, and Subject information. The formatting (font, style, etc.) of the message header cannot be changed.

1. Click on the **New Mail Message** button 

for the Inbox to begin entering a message.

   The **Untitled Message** window displays. ***Note*** that **Untitled Message** is also added below to the **Windows Taskbar**.

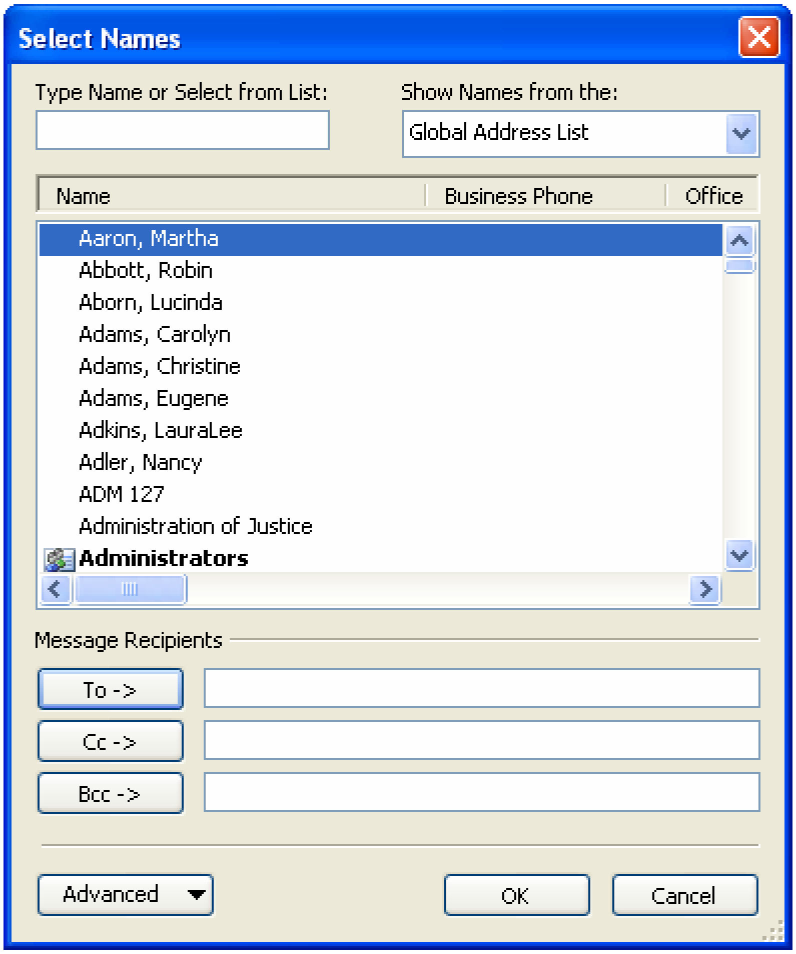



2. The cursor ("Insertion Point") is blinking in the **To…** field.

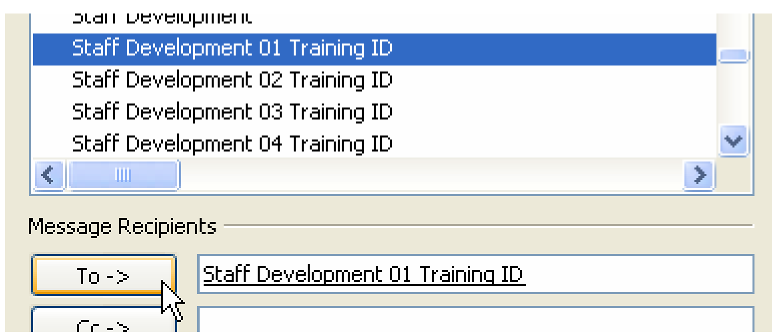
3. Click the **To…** button 

to display the **Address Book**.

4. Ensure that the **Global Address List** appears in the "**Show Names from the:**" box. This is maintained by the system administrator and has all ECC addresses.




5. Scroll down in the **Global Address List** until your partner's training ID name appears in the list of addresses.




6. Click the **To ->** button in the **Message Recipients** area to add your partner's name to the field.

7. Click the **OK** button to return to your message. Your partner's name should be underlined in the **To**… field.

8. For future reference, notice the **Cc** (**Carbon Copy)** button, but do not place any name in the field. There is also a **Bcc** (**Blind Carbon Copy**, to view click the arrow next to the **Options** button , and then click **Bcc**).

**To, Cc, and Bcc boxes**

| Box | Meaning |
|---|---|
| **To** | The message is sent directly to the recipient |
| **Cc** | Cc is shorthand for Carbon copy. If you add a recipient's name to this box in an Outlook e-mail message, a copy of the message is sent to that recipient, and the recipient's name is visible to other recipients of the message. |
| **Bcc** | Bcc is shorthand for Blind carbon copy. If you add a recipient's name to this box in a mail message, a copy of the message is sent to that recipient, and the recipient's name is not visible to other recipients of the message. |

**NOTE:** you can put more than one address in any of these fields, separated by a semicolon (**;**)

**NOTE:** You could also type in just the **USERNAME** portion of an email address (i.e. sd15) in the **To, Cc, or Bcc** fields for anyone with an El Camino address, and Outlook will check to see that the name really exists, and auto fill the rest.

9. Click in the **Subject** field (or press **Tab** to navigate there) and type the subject of your first message as provided by your instructor. **Note that as soon as you exit from the Subject field, the Title Bar and the button on the Windows Taskbar change to reflect the subject** (no longer "**Untitled**")

## *Creating the Message Body*

1. **Tab** to or click in the **message window** and type the first message to your partner. Note that as you begin to type, the **Formatting Toolbar** is activated above.

2. Select the first line of your message **and change the font size, style, and color** using the buttons in the Formatting Toolbar. Center the first line using the **Center** Align button.

2. Press the **Send** button  to send the first message.

## *Receiving a Message*

1. View your **Inbox**. Note that the Inbox shows a new unread message with a closed envelope icon.

2. **Click once** on the new message to see the contents in the **Reading Pane**. Options to align this window to the **right**, **bottom**, or turn it **off**, are located under **View / Reading Pane**.

3. **Double-click** the message to open it.

4. Click on the **Close** button in the message window to close the message. Note that the icon has changed to **an open envelope**, indicating that the **message has been read**.

## *Creating Additional Messages*

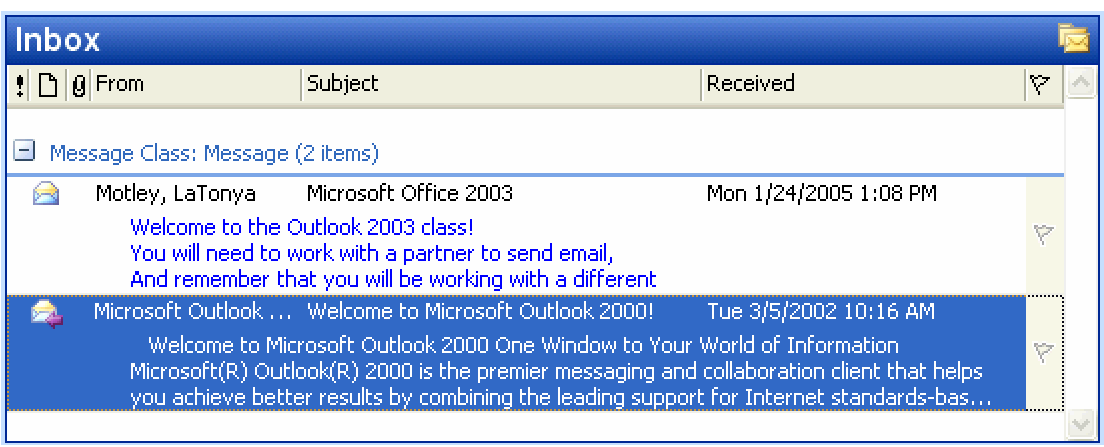
1. Create more messages to your partner and others as indicated by your instructor.

   To send an item as **High Importance**, click on the red exclamation point in the toolbar.

2. Remember to press **Send** to complete each message. The message window should close, and the task should disappear from the Windows Taskbar.

## *Using AutoPreview*

1. Enable **AutoPreview** by selecting **View / AutoPreview**. Each message should have a preview paragraph indented beneath it.



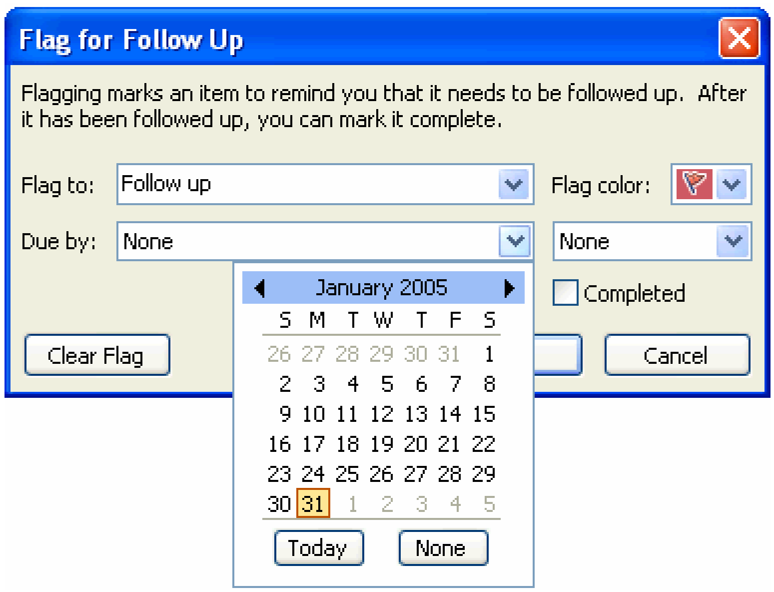
2. Click **View / AutoPreview** again to change back to **Messages** view.

## *Changing Message Status*

1. Select the first message, which shows as a read message.

2. Choose **Edit / Mark as Unread**. Or **right-click**, then choose **Mark as Unread**.

   The message icon returns to a closed envelope. You can also flag the item by **right-clicking** the message and choosing **Follow-up / Add Reminder...** to remind you to take further action by a specific date and time.



## *Replying to a Message*

1. **Double-click** the first message to open it.

   The message window displays.

2. Click the **Reply** button 

on the message window toolbar.

   The reply window for that message displays. The original message is included and the insertion point is blinking in a blank line at the top of the message window.

3. Type the reply to that message as indicated by the instructor. As you type, your reply text displays in Arial 10 pt. blue (default setting for replies).

4. Click **Send** to send reply.

   The original message window displays.

5. Click the **Close** button to close the first message window.

**** NOTE: <u>Reply to All</u> ****

Simple rule: Seriously consider avoiding the Reply to All. 

(This sends a reply to the originator of the message, as well as to **EVERYONE** in the **To** and **Cc** fields).

## *Forwarding a Message*

Occasionally, it is necessary to forward a message to another person. Before forwarding, make sure that person is not already listed in the To or Cc field.

1. **Double-click** the second message to open it.

2. Click the **Forward** button 

on the message window toolbar.

   The forward window for the message displays. The original message is included, and the insertion point is blinking as a blank line at the top of the message window.

3. Type a message to the next recipient as indicated by the instructor. As you type, your text displays in Arial 10 pt. blue (default setting for forwards).

4. Click **Send** to forward the message.

   The original message window displays.

5. Click the **Close** button to close the second message window.

## *Printing a Message*

In the training room, we cannot print messages. For messages you want to print, you may perform the following steps at your own workstation:

1. Open the message (double-click).

2. Click the **Print** icon  in the toolbar (or click **File / Print...**).

   The e-mail message prints.

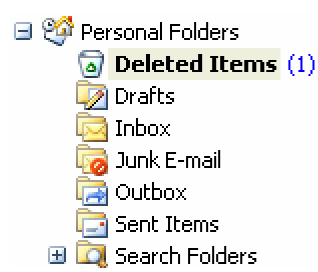
## *Deleting a Message*

1. **Select** the message (single-click).

2. Press the **Delete key** on your keyboard, or press the **Delete button**  on the main toolbar.

3. The message is deleted from your Inbox and is moved to the **Deleted Items** mail folder. It is **not permanently deleted** until you empty the Deleted Items bin!

## *Retrieving a Deleted Message*




1. **Click** on the **Deleted Items** Mail Folder.

   The deleted items display.

2. Locate the message you wish to restore and **Drag-and-drop** it back into your Inbox.

   The deleted item moves back to the Inbox.

# Section 4 – Using Distribution Lists

## *Why Use a Distribution List?*

A Distribution List is a **group** of e-mail addresses, used whenever you regularly send correspondence to the same group of people. Examples of a personal distribution list that you might create could include "**Students in Online Geography Class**," "**Parking and Rideshare Committee**," "**Holiday Party Planning Committee**," etc.

Personal distribution lists are identified with and are stored by default in your **Contacts folder**, so you can sort, print, and assign categories to them. Using your own or a global distribution list can save you time and effort when you are sending to an established group of people.

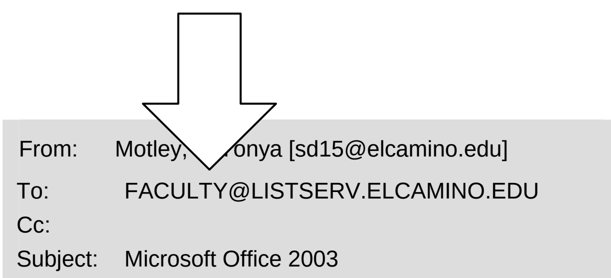
## *What's the Difference between a Distribution List and a ListServ?*

The campus has several **listservs**, including:

**STAFF@LISTSERV.ELCAMINO.EDU**
**FACULTY@LISTSERV.ELCAMINO.EDU**

**NOTE**: A message sent to a distribution list looks different from a message sent to a ListServ. Distribution list recipients **see their own names** and the **names of all other recipients** on the **To:** line of the message. **This is not true for Listservs**.

Listserv membership is set by the campus Network Administrator. The recipients see **only the name of the list**; there is no way to tell who else received the message.



## *Creating a Personal Distribution List*

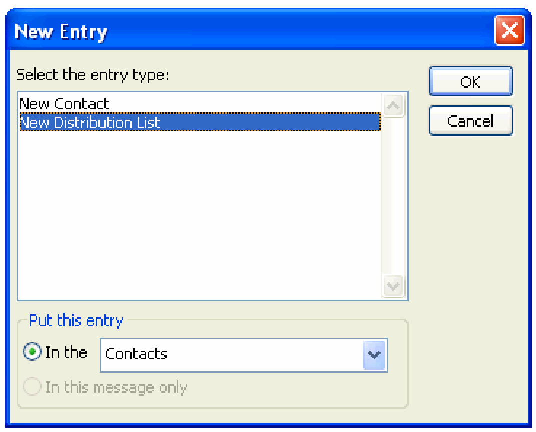
1. From anywhere in Outlook, click on the **Address Book** icon  located in the toolbar.

   The Address Book dialog box displays.

2. Click the **New Entry** button .

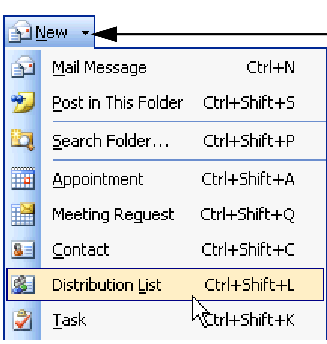
   The **New Entry** dialog box appears.

3. Select **New Distribution List** as the type of new entry, and make sure that **Contacts** is where it will be put. Then click **OK**.




The **Distribution List** window appears.

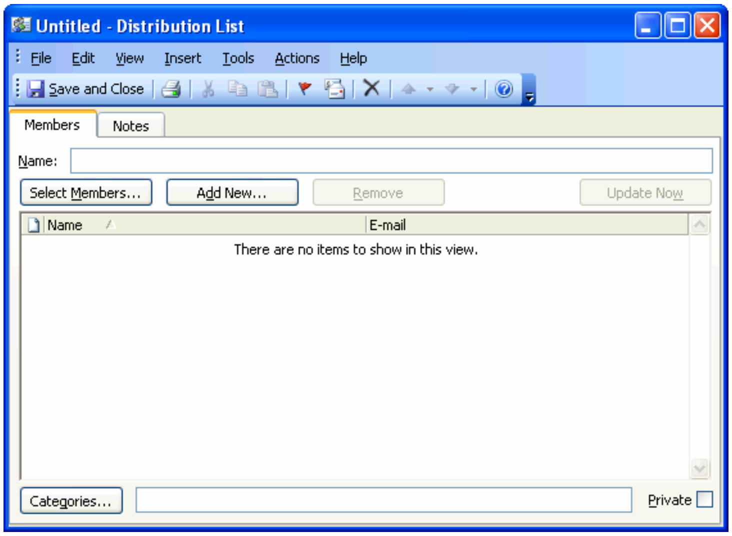
**NOTE**: You can also opened a new Distribution List (or any other new item) from any Outlook folder by using the **New** button:



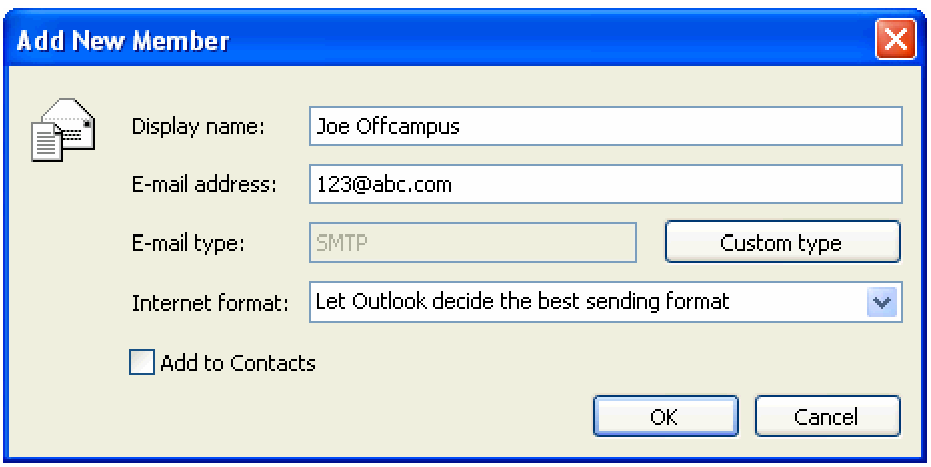

Simply click on the **down arrow** next to the **New** button (in the menu bar.)

Choose **Distribution List** from the pull-down menu.

5. Type **"[Your Name]'s List"** as the name of the new list.




6. Click on the **Add New...** button and enter the following, then Click **OK**:




7. Click on the **Select Members** button.

   You may add members to a distribution list from any source, including the **Global Address List**, **Personal Address Book**, or your **Contact List**.

8. Select **yourself** and your **partner** from the Global Address List and click the **Members ->** button to place them onto the list to add.

9. Click **OK** to close the Select Members dialog box.

10. Click **Save and Close** in the Distribution List window to save your list and return to the Address Book.

You can now **select Contacts** to see that the **distribution list has now been added to your Contacts list.**


**NOTE:** You can pull up your **Contacts** in the '**Show Names from the:**" drop-down box when you click on the "**To...**" button of any new unsent message.

11. **Close** the Address Book dialog box.

### *Awareness of Distribution Lists When Using Reply or Reply All*

Most messages are sent from an individual. On occasion, you may receive a message that shows not the name of an individual, but the name of a **list** in the **From** field. Use caution when replying in these rare occasions, since in these cases, a **reply** serves the same function as using the **Reply to All** button in a regular message.

Likewise, if you use **Reply to All** in a message that was sent by an individual to you but **includes a distribution list name such as** "**All Employees**," be aware that your response will go **not only the sender** of the original message **but to everyone on the distribution list as well!**

# Section 5 – Sending Attachments

An attachment is any item not included as part of the message body that is instead included with the e-mail message as a separate file. Attachments are used when it is impractical or inefficient to send the contents of a file as part of the original message.

## *Inserting an Attachment*

1. Click the **New Mail Message** button to begin sending the message.

    A new Untitled Message screen displays.

2. Click the **To…** button to bring up the Address Book and select your **partner's ID**.
3. In the Subject line, type the subject "**Company Picnic Flyer**."
4. In the message window, type a short paragraph describing the attachment as indicated on the "**Outlook Level 1 Exercises**."
5. Choose **Insert / File...**, or click the Insert File button  on the message toolbar.

    The Insert File dialog box displays.

6. Select the file "**picnic.doc**" from the **Desktop >Training>Outlook** folder.
7. Click **Insert**.

    The file is inserted and listed in the new **Attach** field.

8. Click the **Send** button to send the message and the attachment to your partner.

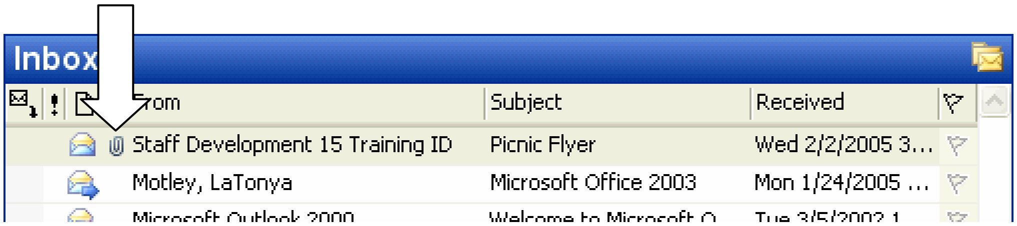
## *Determining How to Attach Files*

Before sending a file as an attachment, consider the type of file (Word, WordPerfect, Excel, etc.) and the version ('97, 2000, 2003, 12, 11, 10, etc.) of the document you are sending. **Does every recipient have the ability to read this file?** Incompatible software will cause the attachment to be unreadable on the receiving end.

If you have a lesser version of the software (e.g., you have Word 97 and your recipients have Word 2000), you may send them your version knowing that their more advanced version will be able to convert the file upward.

## *Receiving Messages With Attachments*

1. View the messages in your Inbox.  The message with the attachment shows a "**paper-clip**" icon.




2. **Double-click** the message to open it.

2. **Double-click** the attached file in the **Attachments:** field.

   The **Opening Mail Attachment** dialogue box appears.  From here you can either Save the attachment or Open it directly.

3. Click the **Open** button to open the file with the appropriate program (Word, Excel, etc).  (At this point, you can also save a copy of the attachment to your computer).  If you do not have the proper software to run the file, a dialog box will appear asking you to select a program that the computer should use in attempting to open the file.

4. **Close** the program window for the program running the attachment.

   The original message displays.

## *Saving Attachments on Your Computer*

You can still save an attachment, even if you can't open it on your computer. Simply choose **File / Save Attachments**, or **Double-click** the attachment and click the button to **Save**.

**NOTE:** ***Replying and Forwarding With Attachments***

- If you **reply to a message** that has an attachment, the attachment **will not be included** with the original message text sent back to the sender.

- If you **forward a message** that has an attachment, the **attachment goes with your forwarded message**.

# Section 6 – Using the Folder List

## *Why Use the Folder List?*

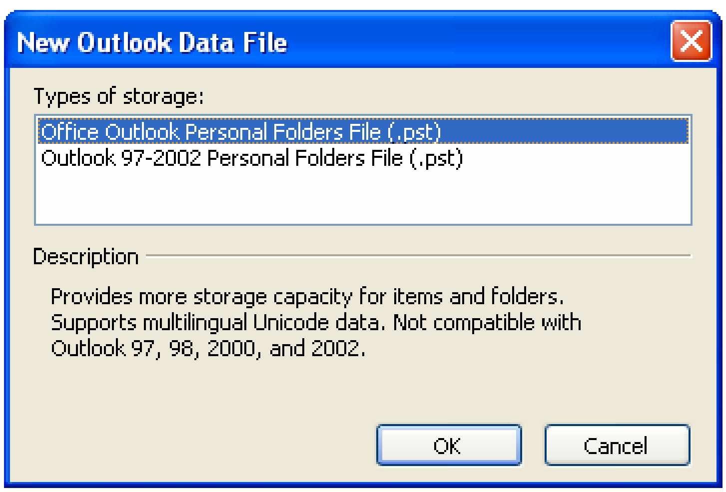
It is important to manage your Outlook folders carefully, so that you can quickly organize e-mail messages and be able to work off-line when the server is unavailable. The folder list can be opened and closed by selecting the Folder icon at the bottom.

## *Adding Personal Folders for the First Time*

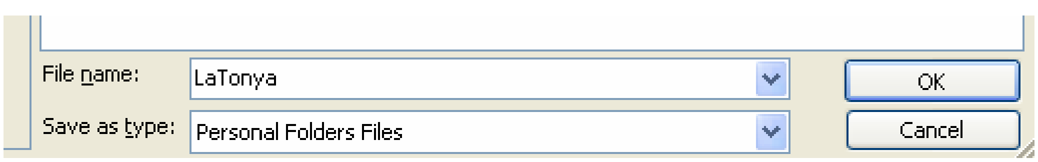
1. Choose **Tools / Options…**.
2. Click the **Mail Setup** tab, then in the Data Files area click the **Data Files…** button.

   The **Outlook Data Files** dialog box displays.

3. Click the **Add…** button
4. Select **Office Outlook Personal Files Folder (.pst)** and click **OK**.



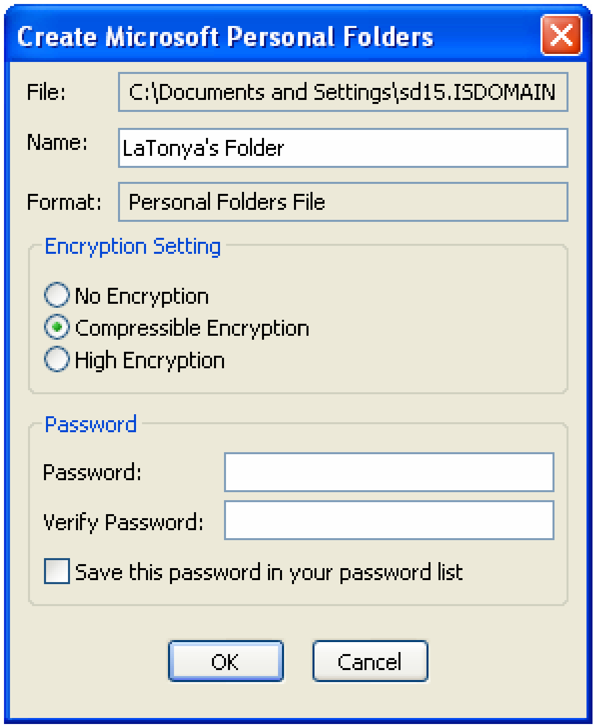

5. In the File name box, type "**[your name]**" and then click **OK** to create the file.




The **Create Microsoft Personal Folders** dialogue box appears.

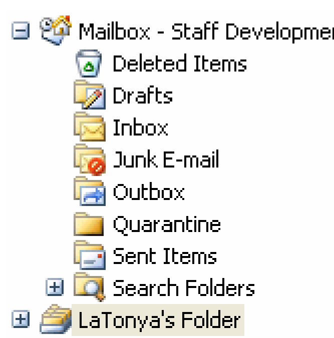
6. You can now enter a name for your Personal Folder as it will be displayed in the Folder List. In the Name: box, type "**[Your Name's] Folder**".

7. You can choose to assign a password, so that the **folder contents cannot be viewed even if you have Outlook open and you walk away from your desk.**




8. Click **OK** to complete your new personal folder. Click **Close** in the Outlook Data Files box, and **OK** in the Options Box to return to Outlook.

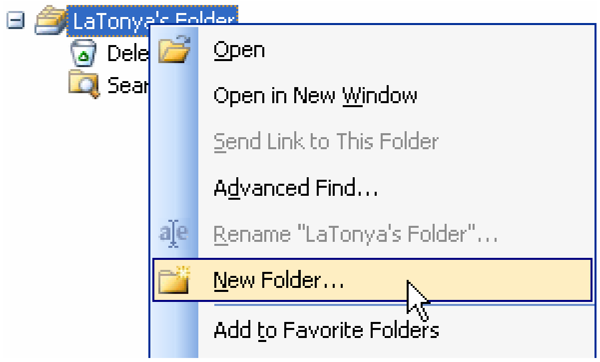
Your new Personal Folder appears under your Mailbox folders.




You can move email to this folder by **right-clicking** on an email message and choosing "**Move to Folder**" or you can simply drag-and-drop messages.

You can also **create sub-folders** within your personal folder by **right-clicking** on the folder and choosing "**New Folder**"

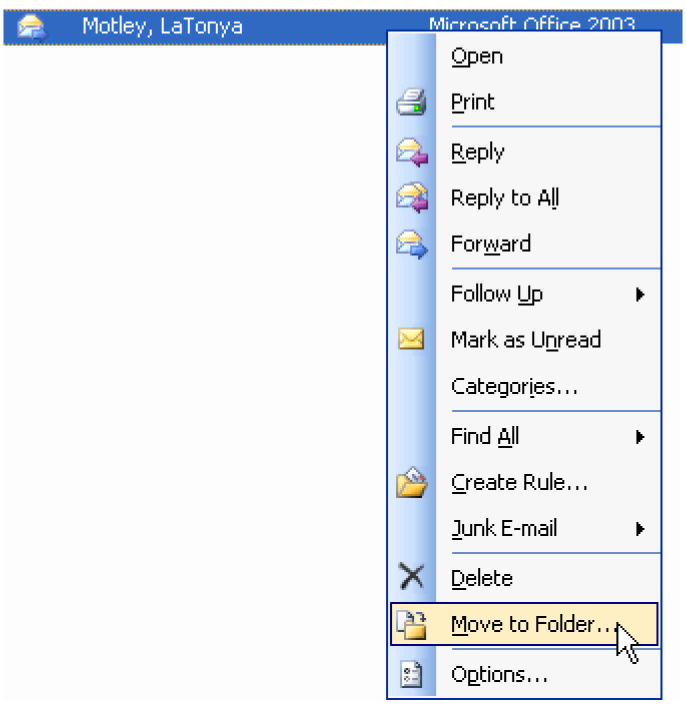
## *Creating More Folders and Sub-Folders After You Have Set Up the Personal Folder Service:*




*Simply **right-click** on any of the folders in the Folder List, and choose **"New Folder…"***

*In the **Create New Folder** dialog box, give your new folder a name and then select where to place the folder. Click **OK**.*

## *Moving Items Into Folders*




***Right-click** the email(s) you wish to move and select **Move to Folder**. In the **Move Items** dialog box, select the destination folder and click **OK**.*

*You can also **drag-and-drop** emails into the desired folder.*

# Section 7 – Recalling Messages

## *Viewing Items Previously Sent*

1. Click the **Sent Items** mail folder to view the list of sent items.

   **Note: You may want to occasionally empty this folder for security purposes, as well as empty the Delete box.**

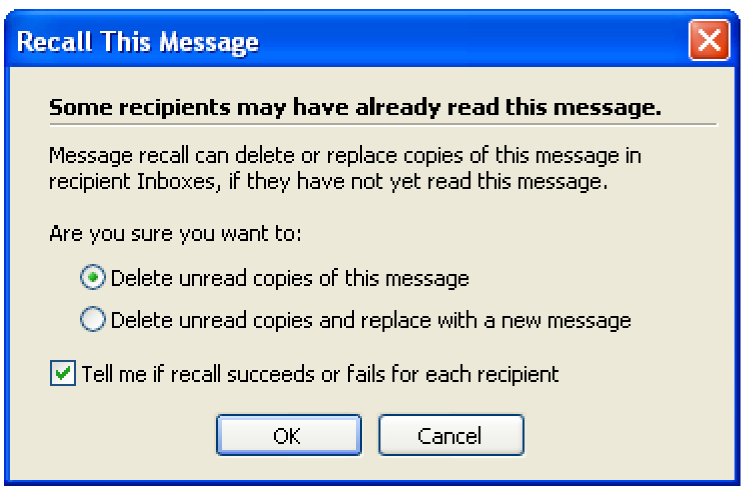
## *“Unsending” Mail*

It is possible to “unsend” an item, provided that it has not yet been read by the recipient(s). Once a recipient has read an item, it becomes the property of the recipient and can no longer be retrieved by the sender.

1. Within your **Sent Items** folder, **Open** an email message.

2. Choose **Actions / Recall This Message** from the message window.

   The Recall This Message dialog box displays.




3. If necessary, choose the option to “**Delete unread copies of this message**” and ensure that the box is checked to “**Tell me if recall succeeds or fails for each recipient**.”

4. Click on **OK** to recall the message.

## Section 8 – Using the Out of Office Assistant

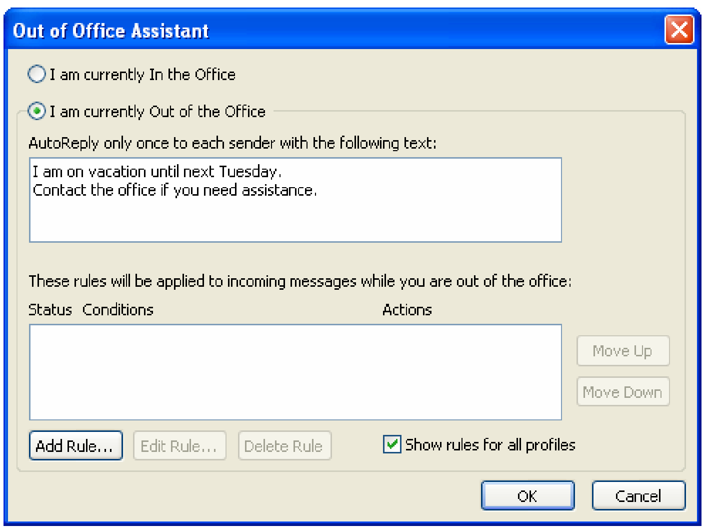
The Out of Office Assistant is a feature used **to inform others that you are not available to respond to their e-mail messages** at this time. It can be used for long-term absences such as vacation or jury duty, or it can be used for short-term absences such as seminars or daylong business trips.

The Out of Office Assistant sends your message once to each sender. **It does not prevent the messages from being received**, nor does it block subsequent messages from that sender.

### *Creating the Message*

1. Choose **Tools / Out of Office Assistant…**.
   The Out of Office Assistant dialog box displays.

2. Click on the option that says, "**I am currently out of the office**" and type the message you wish senders to see during your absence.




3. Click **OK** to apply the changes.

### *Testing the Message*

1. Send a new e-mail message to your partner.

2. After sending, note the message that appears in your Inbox informing you of your partner's temporary absence.

### *How to Turn the Out-of-Office Assistant Off*

1. **Exit** Outlook to simulate you leaving for a fantastic Hawaiian vacation.

3. **Restart** Outlook, simulating your return. Note the message that appears.