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 and 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.
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.
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
**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.

![E-Mail Options window](image)

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.

![When new items arrive in my Inbox](image)

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...**

*March 2005*
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.

March 2005
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).

<table>
<thead>
<tr>
<th>Box</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>To</td>
<td>The message is sent directly to the recipient</td>
</tr>
<tr>
<td>Cc</td>
<td>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.</td>
</tr>
<tr>
<td>Bcc</td>
<td>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.</td>
</tr>
</tbody>
</table>

**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.

March 2005
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.

![Flag for Follow Up dialog box]

Flagging marks an item to remind you that it needs to be followed up. After it has been followed up, you can mark it complete.

Flag to: Follow up  Flag color: 
Due by: None  Due by: None

[Calendar view showing dates from January 2005 to March 2005]

[Today and None buttons]
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: **Reply to All** *

   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.

March 2005
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**:

![Add New Member Window]

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.

*March 2005*
You can now **select Contacts** to see that the **distribution list has now been added to your Contacts list.**

![Contacts list](image)

**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.

3. 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.

4. 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.

   ![New Outlook Data File dialog box]

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

   ![Create Microsoft Personal Folders dialogue box]

   The Create Microsoft Personal Folders dialogue box appears.

March 2005
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”.

March 2005
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.

   ![Recall This Message Dialog Box]

   Some recipients may have already read this message.

   Message recall can delete or replace copies of this message in recipient Inboxes, if they have not yet read this message.

   Are you sure you want to:
   - [ ] Delete unread copies of this message
   - [ ] Delete unread copies and replace with a new message
   - [x] Tell me if recall succeeds or fails for each recipient

   OK  Cancel

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.