

Course Topics

- Creating and Sharing Contacts
- Customizing Views
- Sorting / Organizing Folders
- Managing Address Books
- Auto Signatures
- Sharing Folders (Calendars, Email Inboxes, Contacts, etc.)

Personal Information Manager (PIM)

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 **six major functions** or features:

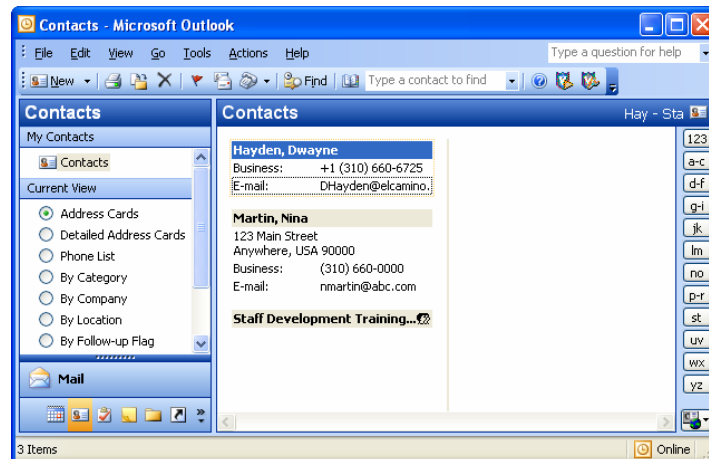
1. E-Mail – the electronic mail message
2. Calendar – the on-line version of your desk calendar
3. Tasks – the “To Do” list
4. Contacts – the on-line version of your Rolodex
5. Journal – the automatic way to track projects
(not a focus of this series of classes)
6. Post-It Notes – the fun way to create computerized versions of your paper Post-Its
(not a focus of this series of classes)

Section 1 – Using Contacts

Entering a New Contact

1. Click the **Contacts** icon  on the Outlook Bar.

The Contacts List displays.



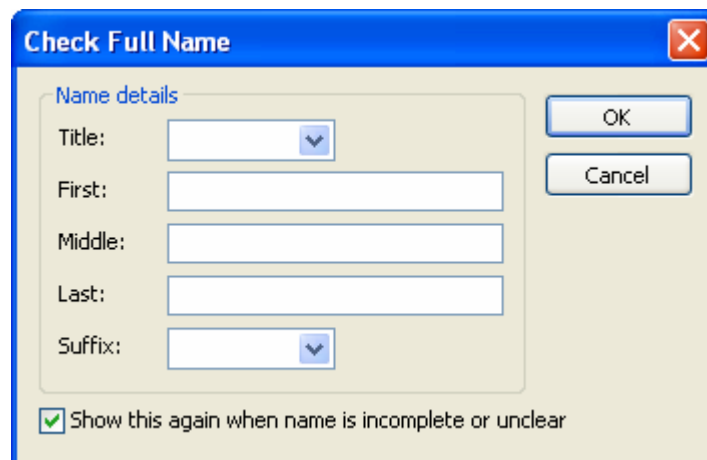
2. Ensure that under **View > Arrange By > Current View**, that **Address Cards** is selected.

3. Click on the **New Contact** button .

The Untitled – Contact window appears. You will enter the 3 contacts on the following page, and also **enter yourself as a contact**:

4. Click the **Full Name** button.

The **Check Full Name** dialog box displays. This box allows you to enter each element of the name in a separate field for **sorting** purposes.



5. Complete the **Full Name** for **yourself** and click **OK** when finished.
6. Click the **Save and Close** button. Complete the rest of the contact cards as indicated below:

◆ **Nina Martin:**

General Details Activities Certificates All Fields

Full Name... Nina Martin

Job title: Secretary

Company: ABC

File as: Martin, Nina

E-mail... nmartin@abc.com

Display as: Nina Martin (nmartin@abc.com)

Web page address:

IM address:

Phone numbers

Business... (310) 660-0000

Home...

Business Fax...

Mobile...

Addresses

Business... 123 Main Street
Anywhere, USA 90000

This is the mailing address

- ◆ **Ellen Berman**, Director, XYZ Company, 111 First St. Anywhere, USA 90000
 - ◆ **Bob Saunders**, Coach, Little League, (no address), 310-555-1212
 - ◆ **Also, add in your Partner's contact information.**
7. Be sure to click the **Address** button to enter addresses in separate fields for sorting purposes.
 8. When finished with **General** tab information, click the **Details** tab and input a **birthday** for Nina Martin as **today's date**.
 9. Click on **Save** and **Close** when finished with each one.

The new cards are inserted into the Contact List in alphabetical order by last name.

Berman, Ellen	
111 First St. Anywhere, USA 90000	
Martin, Nina	
123 Main Street Anywhere, USA 90000	
Business:	(310) 660-0000
E-mail:	nmartin@abc.com
Saunders, Bob	
Business:	(310) 555-1212

Editing a Contact Card

1. **Double-click** the title bar for the Contact.


The Contact card opens.

2. **Click** inside the field(s) to be edited and make the changes as necessary. Click **Save and Close** to complete.

Navigating Contacts

1. Click the “m” shortcut tab  on the right side of the Contact List.

The card for Martin, Nina is selected.

2. Click the “s” shortcut tab .

The card for Saunders, Bob is selected.

3. Press the **Home key** to return to the first card in the list (Berman, Ellen).

Changing Contact Views

1. Click on **View > Arrange By > Current View** and select **Detailed Address Cards**.

Each card displays more information, if available on the card.

2. Navigate to the **Current View** again and select **Phone List**.

The contact information sorts itself in traditional phone list format, in alphabetical order by last name.

Contacts				
	Full Name	Company	File As ▲	Business Phone
Click here to add a new C...				
	Ellen Berman	XYZ Company	Berman, Ellen	
	Nina Martin	ABC	Martin, Nina	(310) 660-0000
	Bob Saunders	Little League	Saunders, Bob	(310) 555-1212

3. Click the **Current View** down arrow and select **By Company**.

The contact information sorts itself into groups alphabetically by the company name, and then by alphabetical order of last name.

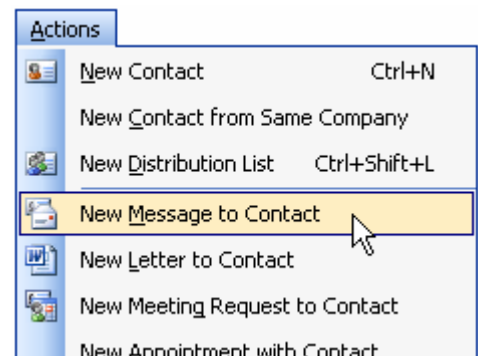
4. Change the **Current View** back to **Address Cards**.

Sending an Email Message to a Person in Your Contact List

1. From within the Contact folder, **click to select a contact** to send an email message (to yourself or your partner).
2. **Select Actions** from the Menu and choose **New Message to Contact**.

A new email message window displays, with the **To** field addressed to the contact you selected.

NOTE: Your contacts may also show up in your **Show Names from the...Global list menu**, depending on the current ECC server settings.



Sending a Contact Card as an Attachment

1. From within the Contact List, click the **down arrow** next to the **New Contact** button.

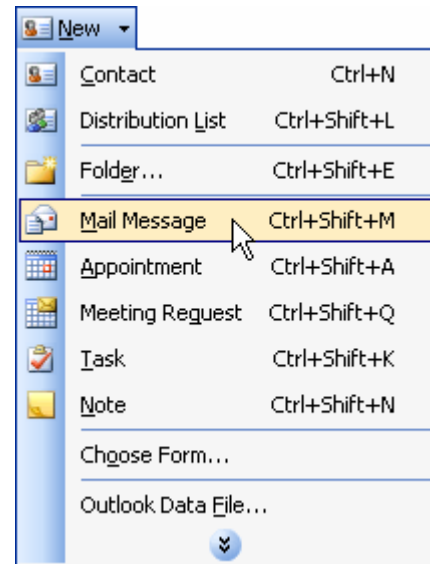
The **New Items** pull-down menu displays.

2. Select **New Mail Message**.

A blank, **Untitled Message** displays.

Note: We didn't have to go to the **"Inbox"** to start a new email!

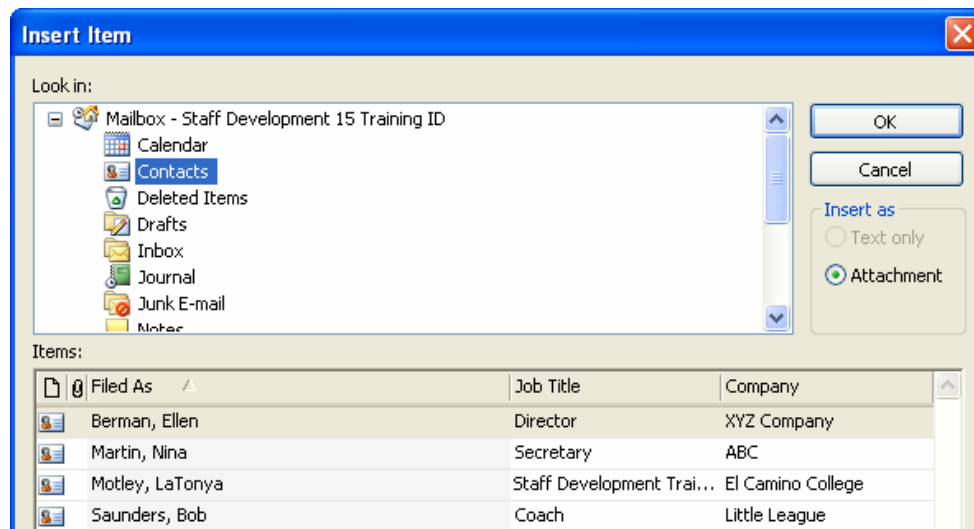
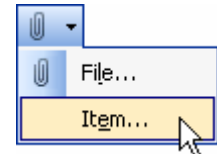
Any Outlook function can be reached from within any other function that you are in, simply by clicking on the **down arrow** next to **New**.



3. Select your partner (**SD##**) as the recipient of this new message and type the subject **"Contact Information."**
4. **Click** inside the mail message window and type a short paragraph indicating the purpose of the attachment as follows:

"Here is the contact information you wanted."

5. **Click** the down arrow for the Attachment icon and **Choose Item**.
6. Click on the **Contacts** icon to see all of your contacts in the windowpane below.



7. **Select** your own contact card from the list. Click **OK**.

The card is inserted into the mail message.



The Contact card is inserted as an **attachment**, with a Contact icon beside the name.

8. Click **Send** to send the message and contact card.

Transferring Contact Cards to Your List

1. Click the **Mail** icon on the Outlook Bar.
2. Find the new email message in your **Inbox** and **double-click** to open it.
3. **DO NOT** double-click the Contact card, since this will open the card as if preparing it to be edited.

4. Ensure that you can see the **Contacts** icon on the Outlook Bar.



If necessary, **shrink down or move** the e-mail message window, so that it will not cover the Contacts icon behind it.



5. **Click-and-drag** the card from the e-mail message onto the **Contacts** icon on the Outlook Bar.

The card is copied to your Contact List.

6. **Close** the e-mail message.
7. Click the **Contacts** icon on the Outlook Bar and verify that the card was copied to your list. You can use this contact list just as you would use your global email list to find email addresses

Section 2 – Sorting and Organizing Items

Using the Quick Sort Feature

1. If necessary, go to the **Inbox**.
2. In your current field headings, note the location of the **gray up arrow** or **gray down arrow**  . The arrow indicates which field is the **primary sort field** for your messages, and which sort order is being used (ascending or **descending**).

Outlook **defaults** to sorting in **descending order** in the

Received field. This order ensures that you will see the most recently received messages at the top of the list.



3. Click on the **From** field heading.



The mail sorts in ascending alphabetical order by sender's name.

4. Click again on the **From** field heading.



The mail switches to descending order by sender's name.

5. Click on the **Importance**  field.

The mail sorts in ascending order of importance, with items marked High Importance at the top of the list.

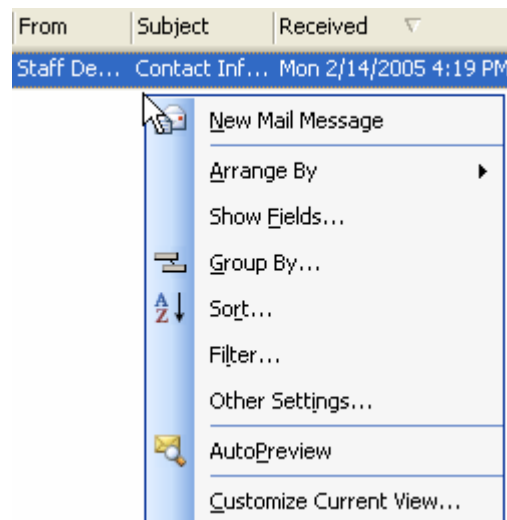
6. Click in the **Received** field to reset the mail back to the original order.

Using Sort/Arrange By

1. **Right-click** anywhere where there is no email message within the Inbox window to display the **Customize Current View** Menu.

NOTE: This window can also be found by going up to the **View** menu and choosing **Current View... Customize Current View**.

2. Choose **Sort** to display the Sort dialog box. This feature allows you to sort information down to **four sub-levels**.



- Sort by **From (Descending)**, then by **Importance (Ascending)**, then by **Received (Descending)** and click **OK** to accept.

The mail sorts in alphabetical order by sender name, then within each name by importance, then by order received, most recent first.

Sort items by


From Ascending Descending

Then by

Importance Ascending Descending

Then by

Received Ascending Descending

- Right-click** and choose **Sort** again and click **Clear All**  to reset the sort order back to the original order.
- Explore Sort/Arrange By features of Outlook.



Grouping Items

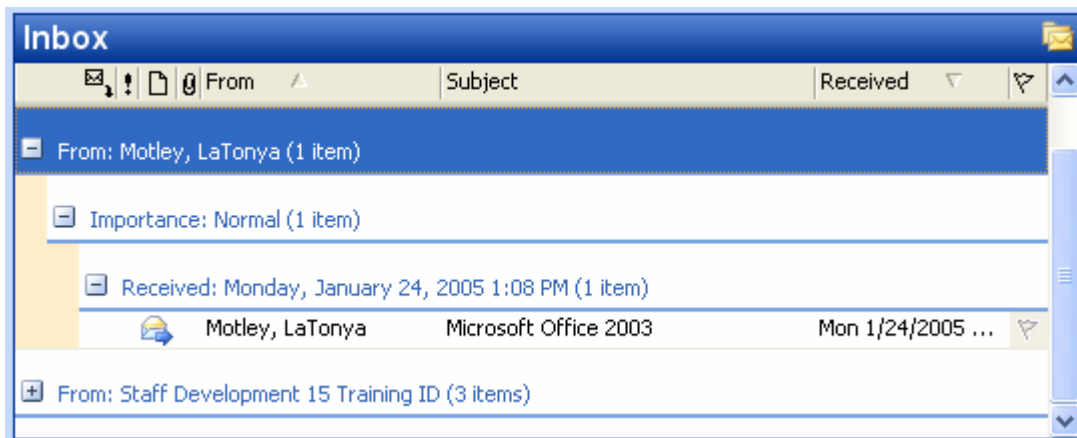
- Right-click** in the **Inbox** to display the **Customize Current View Menu**, then choose **Group By**.

The Group By dialog box appears.

- Group by **From (Ascending)**, then by **Importance (Ascending)**, then by **Received (Descending)** and click **OK** to accept.

Mail is sorted and placed into groups. **Only the group headings show.**

- Click any **plus sign**  to expand the items in the group.
- Click the **minus sign**  to contract the items in that group.



5. Right-click and choose **Group By** and click **Clear All** to reset the grouping back to the original order.

Removing, Adding, and Moving Field Headings

1. **Click-and-drag** the **Importance field heading** diagonally and out of the current field list.

A black X appears over the field heading.

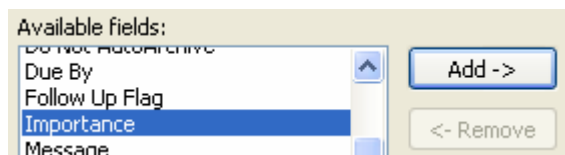


2. **Drop** the field heading while the black X is active.

The field is removed from the view.

3. **Right-click** the **Inbox** to display the **Customize Current View Menu**, then choose **Show Fields**

4. Select the **Importance** field from the list of available fields on the left side of the dialog box, then click the **Add** button.



The **Importance** field is added to the bottom of the field list on the right side of the box.

5. **Click-and-drag** the **Importance** field to the **top** of the order and **drop** it.

The Importance field moves to the top of the list.

6. Click the **OK** button to view the revised field headings.

7. To quickly move an existing field heading, **drag-and-drop** it in a lateral direction until it can be dropped in the desired location.



Creating Custom Views

Sometimes you may want to modify existing views or create entirely new views to show exactly the fields, sorting, grouping, and formatting that you want.

1. Choose **View / Arrange By / Current View / Define Views...**

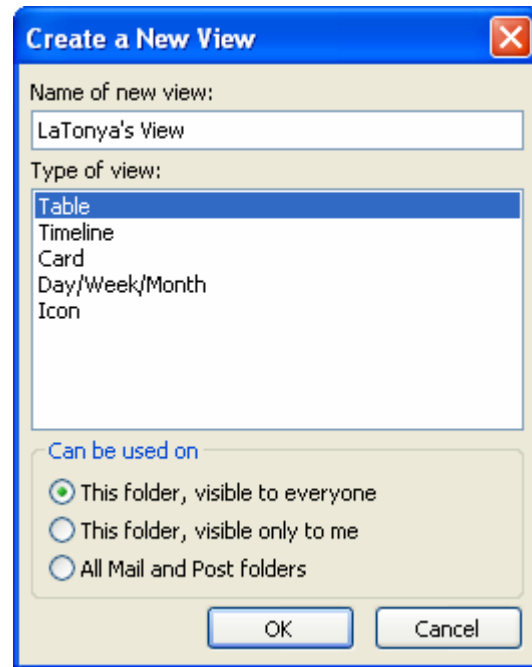
The Define Views for "Inbox" dialog box appears.

2. Click the **New** button.

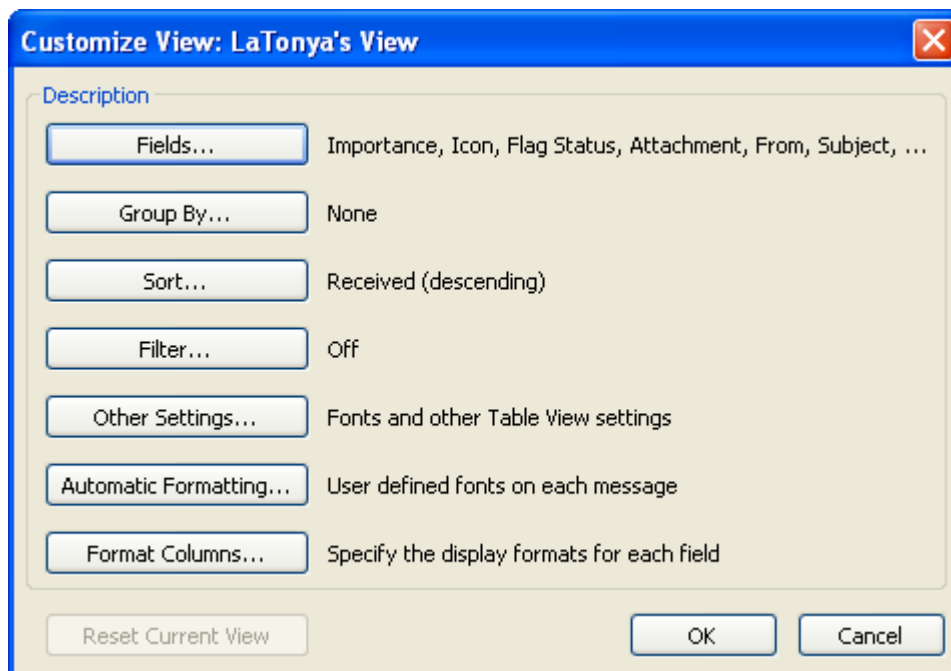
The **Create a New View** dialog box appears.

3. Type “[Your Name]’s View” in the name box, ensure that “**Table**” is selected as the view type, and ensure that the “**This folder, visible to everyone**” option button is selected.
4. Click **OK**.

The **View Summary** box displays.



5. Make changes to the **Fields**, **Group By**, **Sort**, and **Format** sections of the View Summary.



6. When finished, Click **OK** to save your changes, then click the **Close** button to close the Define Views dialog box.
7. Choose **View / Arrange By / Current View**. The “[Your Name]’s View” option should be included in the list.

8. Select it and view the results.
9. To **modify** the view, choose **View / Arrange By / Current View / Define Views**, select your view, and click the **Modify** button.
10. To **delete** a view, choose **View / Arrange By / Current View / Define Views**, select your view, and click the **Delete** button.

Explore View / Arrange By / Current View / Define View in the other features of Outlook (Calendar, Tasks, Contacts).

Section 3 – Using Folders

Why Use the Folders?

It is important to manage your folders carefully, so that you can quickly organize e-mail, be able to work off-line (when the server is unavailable), and clear items from your Inbox on the server (since space may be limited).

Showing/Hiding the Folders

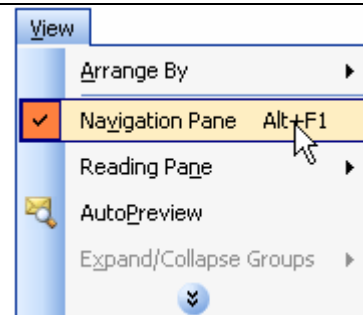
1. Choose **View / Navigation Pane**

The Navigation Pane displays on the right.

2. If necessary, move the border of the Folder List to see the names of your folders.

Outside of the Inbox, it is generally not necessary to display the Folder List until you are ready to change to another group.

To temporarily hide the Folder List, Go to **View > Navigation Pane**, and select to remove the navigation window with the folder view.



Adding New Folder to Inbox

1. Right-click on the **Inbox** in the Navigation Pane and select **New Folder**.
2. Name the new folder “**Personal**”

*It is important to note that you will **be able to see the messages in these folders if you move to another computer**, since these folders are on the El Camino Mail Server.*

Renaming Folders

- 1 Right-click on the folder you wish to rename, in this case choose the “Personal” folder you just created.

The folder name changes to a text box so you can enter new text.\

2. Rename the folder to “**My Personal Mail**”

3. **Click-and-drag** one piece of mail from your inbox to your new folder.

Note: you may also use the **Move to Folder button** () on the toolbar or Right-click.

The mail is taken from the Inbox and is placed in the folder.

Section 4 – Managing Address Books

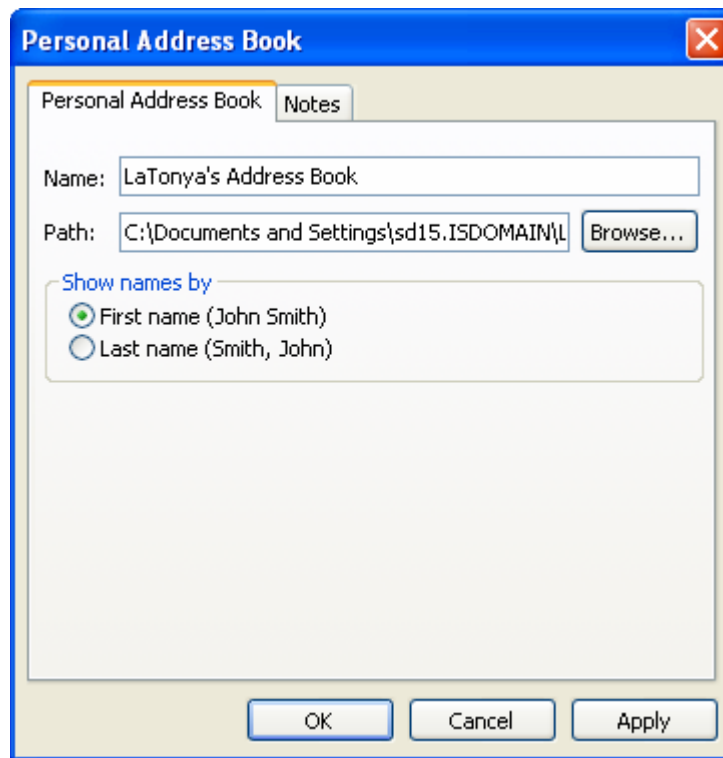
Adding or Removing an Address Book

1. Choose **Tools / E-mail Accounts**.

The E-mail Accounts dialog box displays.

2. In the Directory area, click next to **Add a new directory or address book** and click **Next**.
3. Click next to **Additional Address Books** and click **Next**.
4. Select **Personal Address Book** and click next

The **Personal Address Book** dialog box displays.



5. **Name** your Address Book “[Your Name]’s Address Book” and click **OK** to create it.

A dialog box will prompt you to exit and restart Outlook. Click **OK**.

6. **Exit** Outlook to save changes, then **restart** Outlook to proceed.

To **remove** an address book, click **Tools / E-mail Accounts**, click next to **View or change existing directories or address books** and click **Next**, then select your Personal Address Book and click the **Remove** button.

Adding Names to the Personal Address Book

1. Click the **Address Book** button  on the toolbar.

The Address Book dialog box displays.

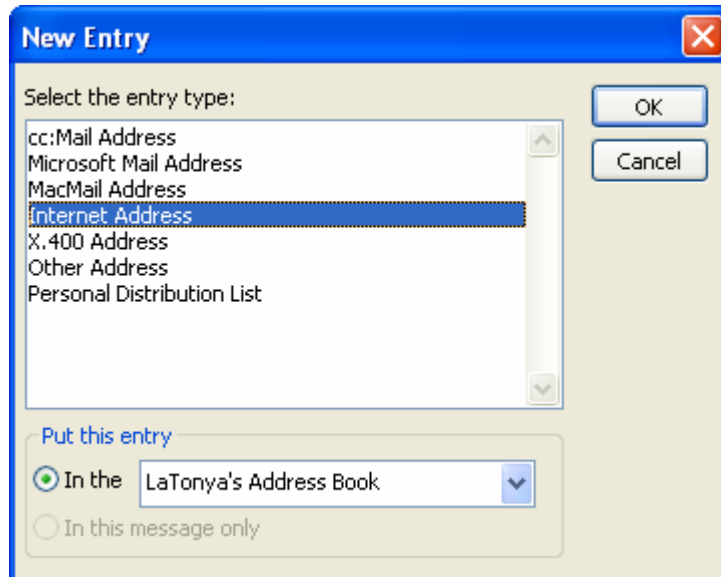
2. Ensure that [Your Name]’s Address Book is listed in the **Show Names from the:** box.

3. Click the **New Entry** button  to add the new person.

The New Entry dialog box displays.

4. In the **New Entry** window, under the **Put this Entry** section, select In the [Your Name]’s Address Book.


5. Then select **Internet Address** as the entry type.



6. Enter **your partner's name** and **e-mail address** on the New Internet Address Properties card, along with any other vital information desired.
7. Click **OK** to return to the Address Book.

Copying Names to the Personal Address Book

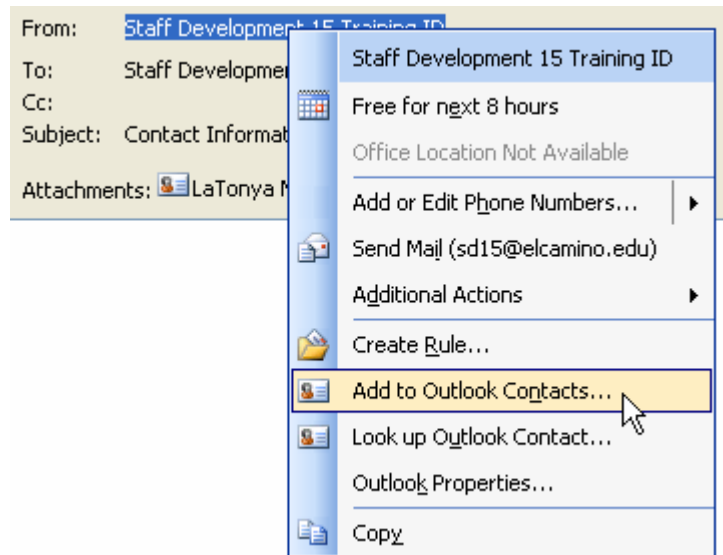
Rather than creating new entries in your Personal Address Book from a blank card, you may wish to simply copy new names from existing sources.

1. **If the person is on the Global Address List**, the person can be added to your Contacts list.
 - a. Change the **Show Names from the:** box to **Global Address List**.
 - b. Select **your name** on the Global Address List.
 - c. Click the **Add to Contact** button  on the Address Book toolbar.

The name, e-mail address, and all other available information are displayed.
 - d. Click **Save and Close** to save the contact to your **Contacts** list. Verify the entry in your Contacts. (Some systems are set to default a copied name to show first name, then last name.)

2. **If the person is not on the Global Address List**,

- a. **Open** the mail message from that person.
- b. In the **From:** line, **right-click** the sender's name.



- c. Choose **Add to Outlook Contacts...**

Only the sender's name and e-mail address will be copied.

Section 5 – Using an AutoSignature

An AutoSignature is a standard block of text that can be added to the bottom of all messages. This may be a “business card” style block for professional use, or a less formal block. You can enter more than one AutoSignature for use in different applications.

Creating an AutoSignature

1. Choose **Tools / Options**. Click on the **Mail Format** tab and click the **Signatures** button.

The Create Signature dialog box displays.

2. Click the **New...** button. Enter a name for your signature and click **Next**.
3. In the text box, create your signature that will be included in outgoing mail messages. In this case, include your **first and last name**, your **job title**, **department**, and **phone/fax numbers**. Edit Font and Paragraph options as you wish.

4. Click **OK** to accept the changes. See that it now displays your signature in the Signature for new messages: area. Click **OK** to close the Options window.

Automatically Inserting an AutoSignature

Because your signature is listed for new messages, Outlook will insert it for you when you **create a New Message**. Note that the AutoSignature is added to the end of the message, with two blank lines between it and the start of the message.

Modifying an AutoSignature

1. Choose **Tools / Options**.
2. Choose the **Mail Format** tab and click on the **Signatures** button.
3. Select your signature and click **Edit**.
4. Drag over your first and last name to select them. Click the Font button. Change the font to **Brush Script**. Change the size to approximately double that of the other fonts in the AutoSignature. Change the color of the name text as well.
5. Click **OK** to accept the changes.

Section 6 – Sharing Folders with Others

Managers will often “delegate” the management of their calendars, tasks, and even e-mail to secretaries or assistants. Likewise, groups or departments that use the same **contact list** or **calendar** will often delegate one person to maintain it, and that person will allow others to view the list and make changes as required.

Adding Delegates

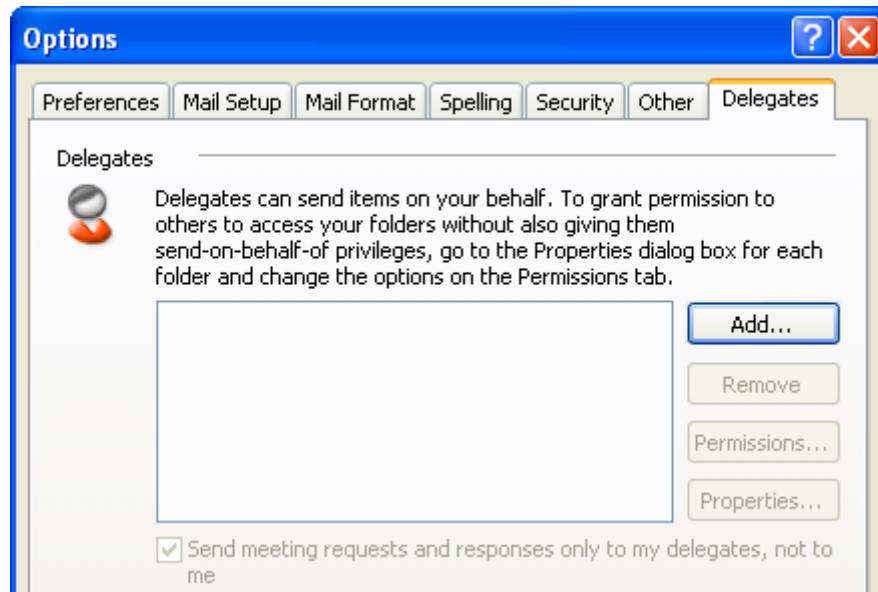
1. Choose **Tools / Options**.

The Options dialog box displays.

2. Click on the **Delegates** tab.

The Delegates dialog box displays. Note that there are currently no delegates for your folders.

3. Click the **Add** button to add a new delegate.



4. Select **your partner's name** as the delegate and click **OK** to accept the new delegate.

Setting Permissions

After you select the person(s) to be a delegate, you must set the permission levels for each folder. There are three main levels:

Reviewer: can view items

Author: can view and add new items

Editor: Can view, add, and edit existing items

NOTE: It is possible to assign the same permissions to more than one person at a time, but it is not possible to give different permissions to different persons on the same permission list. If different permissions are desired, enter those persons as separate delegates.

1. Give your partner **Reviewer** status for your **Calendar** and **Task List**.
2. Allow **Editor** status for your **Contact List**.
3. Ensure that the box is checked to "**Automatically send a message to delegate summarizing of these permissions**".
4. Click **OK** to accept the permissions, then click **OK** to close the Options window.



Revising Permissions

1. Choose **Tools / Options** and click the **Delegates** tab.
2. Select the person(s) you want to revise and click the **Permissions...** button.
3. Set new permissions as desired and click **OK** to accept the changes.

Removing Delegates

1. Choose **Tools / Options** and click the **Delegates** tab.
2. Select the person(s) you want to delete and click the **Remove** button.
8. Click **OK** to accept the changes.

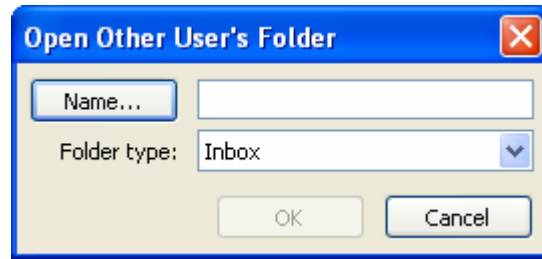
Section 7 – Viewing Folders as a Delegate

If you are informed that you have delegate permissions for another person's Outlook, you may access their folders at any time.

Viewing Another User's Folder

1. Choose **File / Open / Other User's Folder** from the menu.

2. In the **Name** box, type the username of the person who granted you delegate permission, or click Name to select from the Global list.



3. In the **Folder type** box, type or click the name of the folder you want to open.

NOTE: if you enter a folder for which you do not have permission (such as your partner's e-mail), the system will deny access to that folder.

4. Click **OK**. Once the folder window has been opened, you may move or resize its display to view its contents with your own.