

Windows Outlook Level 3

Working with Messages	1
Rules	1
Moving Messages to a Folder based on the Subject	1
Moving Messages to a Folder based on the Sender	2
Saving Unfinished Messages (drafts)	3
Hyperlinks	3
Message Options	3
Calendar	4
Viewing Options	4
Create an Appointment, Meeting or Event	5
Sending an Invitation	5
Printing a Calendar	6
Tasks	6
Creating a task	6
Marking a Task as Complete	7
Printing a Task	7
Coloring a Task	7
Notes	7
Creating a note	7
Changing Notes	7

Windows Outlook Level 3

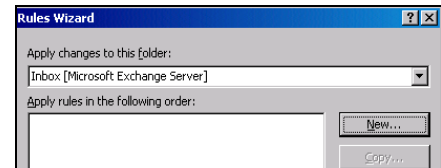
Working with Messages

Rules: You can manage your e-mail messages by using rules to automatically perform actions on messages. After you create a rule, the Microsoft Outlook Rules Wizard applies the rule when messages arrive in your **Inbox** or when you send a message. For example, you can automatically:

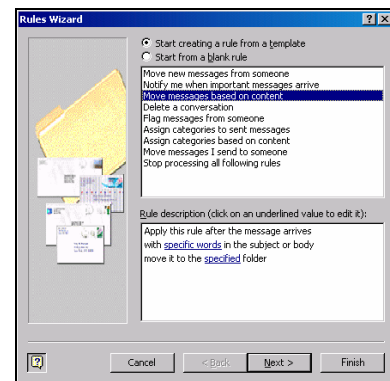
- Designate a folder to receive all incoming messages with a specific word in the subject line.
- Designate a folder to receive all incoming messages from a specific sender

Moving Messages to a Folder Based on the Subject or Body Text

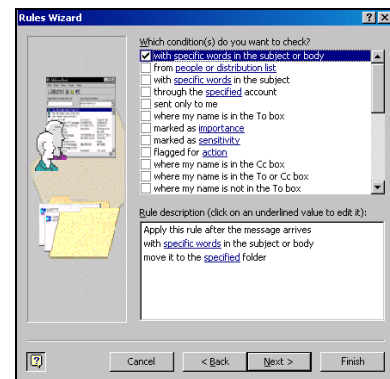
- 1) Under the **Tools** Menu select **Rules Wizard**.
- 2) In the Rules Wizard window click on **New**.
- 3) “Start creating a rule from a template” and select “Move messages based on content.”
- 4) Note the description of the rule in the lower box.
- 5) Click on **Next**.



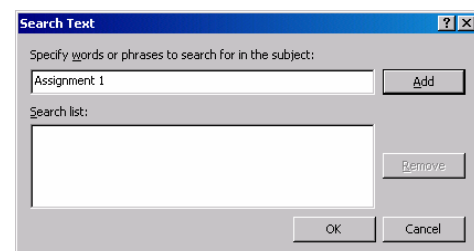
- 6) Select the desired condition or conditions.



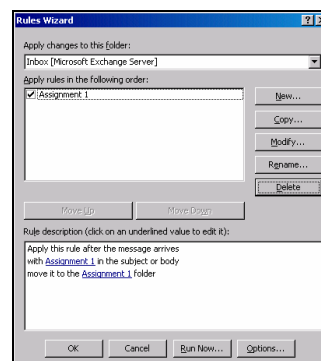
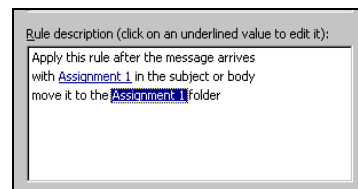
- 7) Click on “specific words.”



- 8) Type in the desired word or words.
- 9) Click on **Add**. The words are added to the Search list box.
- 10) Click **OK**.

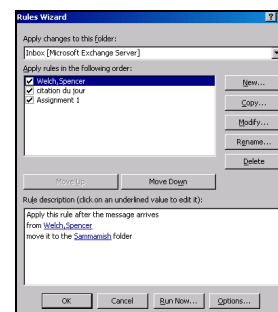
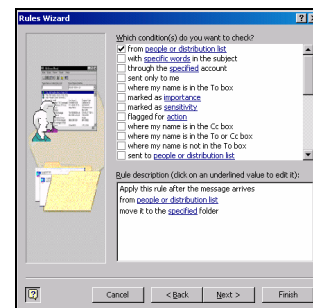
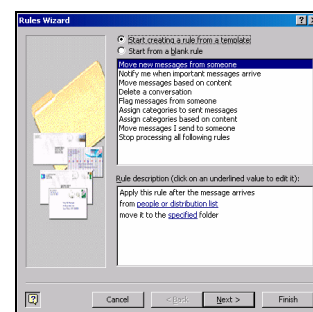


- 11) Note that “specific words” has been replaced with your text.
 - 12) Click on specified folder.
 - 13) Highlight the desired folder or Click on **New** to create a new folder for these messages.
 - 14) Click **OK**.
 - 15) Note that “specified” folder has been replaced with the desired folder.
 - 16) Click **Finish**.
 - 17) The window shows all of the actions and folders.
 - 18) Click **OK** to move all future messages.
- OR**
- 19) Click **Run Now** if you want all existing messages in your Inbox and future incoming messages containing the key word(s) moved. Then **Close**.
 - 20) Click **Close**.



Moving Messages to a Folder based on the Sender

- 1) Under the Tools Menu select **Rules Wizard**.
 - 2) In the Rules Wizard window click on **New**.
 - 3) “Start creating a rule from a template” and select “**New message from someone.**”
 - 4) Note the description of the rule in the lower box.
 - 5) Click on **Next**.
- 6) Select the desired condition or conditions.
 - 7) Click on “people or distribution list” in the lower box.
 - 8) Locate the person or distribution list. (*Out of district addresses can be added by clicking in the **From** area and entering the complete address.*)
 - 9) Click **OK**.
 - 10) Note that “people or distribution list” has been replaced with the your choice.
 - 11) Click on “specified folder.”
 - 12) Highlight the desired folder or click on **New** to create a folder.
 - 13) Click **OK**.
 - 14) Note that “specified” folder has been replaced with the desired folder.
 - 15) Click **Finish**.
 - 16) The window shows all of the actions and folders.
 - 21) Click **OK** to move all future messages.
- OR**
- 22) Click **Run Now** if you want all existing messages and future messages in your Inbox from the specified person moved. Then **Close**.
 - 17) Click **Close**.



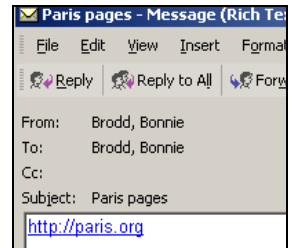
(Note: rules can be applied to e-mails with specific words in the messages, levels of importance, dates and etc.)

Saving Unfinished Messages (drafts)

- 1) While in a new message or a reply, under **File** select **Save** or click on the Save icon.
- 2) A copy of your message or reply is saved in the Drafts folder.

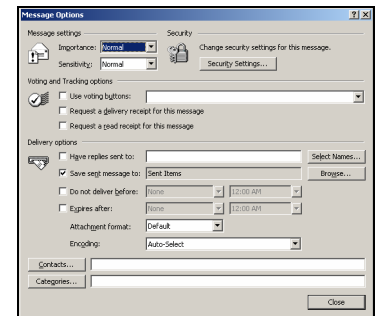
Hyperlinks

- 1) Creating a Hyperlink
 - a) Type an Internet address (i.e. <http://>, <mailto:>) into the text of a message.
 - b) It automatically creates the hyperlink. The recipient of the message can just click on the link to launch I.E. and view the web page or their email application to send a message to the person.
- 2) Editing or Deleting a Hyperlink
 - a) To edit a hyperlink, place the cursor after the link and use the left arrow to move the cursor.
 - b) To delete a hyperlink, drag across the link to select it and hit delete or backspace.



Message Options

- 1) While in a new message, click on **Options** in the Toolbar.
- 2) Message Settings
 - a) Importance
 - i) Click and hold on **Normal** and select desired setting.
 - b) Sensitivity
 - i) Click and hold on **Normal** and select desired setting.



The message will be marked as Personal, Confidential or Private. Messages set as Private cannot be altered.

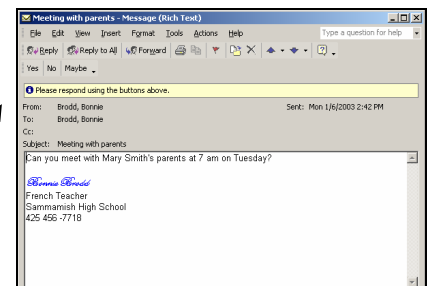
3) Voting

Voting allows you to get a quick response to request that is automatically tallied

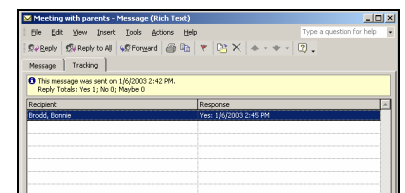
- a) Click on **Use voting buttons**.
- b) Click and hold on the arrow and select desired responses or create your own, separating choices with a semi-colon.

The message will contain a request to reply using one of the options. The recipient can also add a reply.

The reply message will show the response by that person and have an option to see the summary of all the responses.

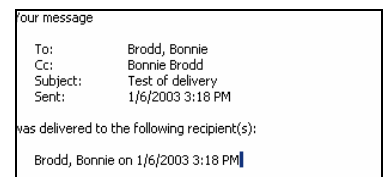


FYI: Voting does not work with the OWA. The message will be sent but the reply will not have the response buttons and will not be included in the summary.

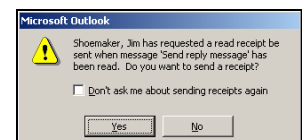


4) Tracking

- a) If you request a **delivery receipt**, you will get a message from the System Administrator showing the time and date of delivery.



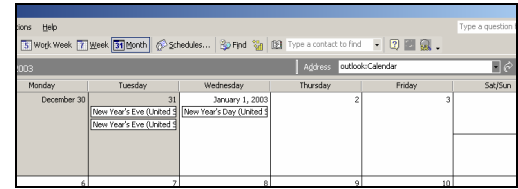
- b) If you request a **read receipt**, the following message appears when the recipient opens the message.



Calendar: *fully integrated with e-mail, contacts and other features.*

1) Viewing Options

- a) Click on **Calendar** on the Outlook Shortcut Bar.
- b) Viewing the Calendar: *(use the view to control the amount of detail that appears on the screen)*



- i) Click on **View** on the Menu Bar; select Current View, and choose:
 - (1) **Day/Week/Month** to view a month calendar.

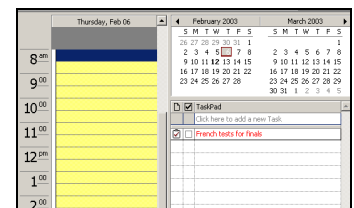
ii) On the Tool Bar, click on:

- (1) **Today**, to view the present day's events.
- (2) **Day**, to view a single day's events.
- (3) **Work Week**, to view M-F events.
- (4) **Week**, to view the week + weekend events.
- (5) **Month**, to view the month's events.



iii) Click on **Day**

- (1) Clicking on a date in the small calendar will cause that date to appear to the left of the calendar.
- (2) Use arrows on the top of the calendars to move the calendars to display different months.



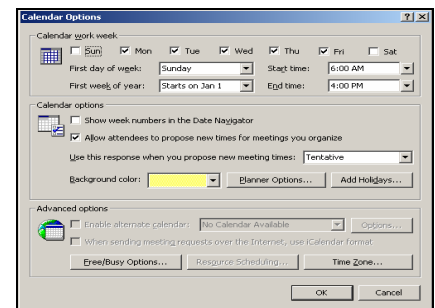
- (3) To add or reduce the number of months showing:
 - (a) Move cursor to either the vertical or horizontal edge of the past/future months until parallel lines show.
 - (b) Click, hold and drag horizontal or vertical to add or reduce the number and layout of the months.
- (4) Active Appointments, Events, and etc. to view a list.

c) **Calendar Configuration Options**

i) Click on **Tools** on the Menu Bar, select **Options**; click on **Calendar Options**.

ii) Set work week options

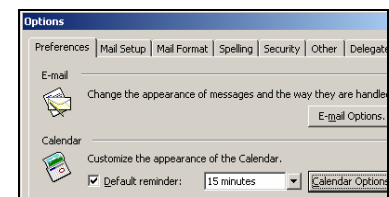
- (1) Select the check boxes next to the days of the week desired to show on the Work Week view
- (2) Enter the general Start Time and End Time for your typical work day (the other times of the day will be in a darker shade)
- (3) Change the background color.
 - (a) Click on **Background Color** and select the desired color.



- (4) Add Holidays
 - (a) Click on **Add Holidays**, click on desired country(s) and click **OK**.
- (5) Click **OK** to return to Options screen.

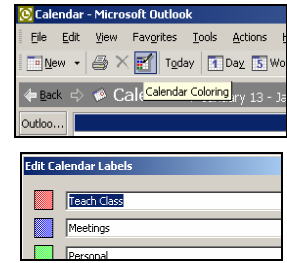
iii) **Default Reminder:** *this automatically displays a reminder for calendar items*

- (5) If desired, click in box to remove the automatic reminders from appearing.
- (6) Click on the time, and select the preferred time to be reminded.



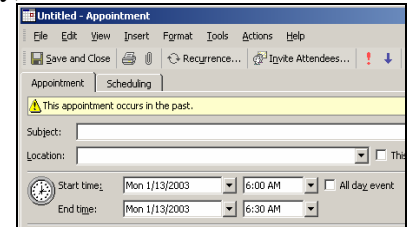
iv) Click **OK**.

- d) Calendar Entry Coloring: *color code appointments and meetings*
 - i) Click Calendar Coloring icon on the Tool Bar.
 - ii) Click on **Edit Labels**.
 - iii) Enter the kind of entries to be associated with desired colors.
 - iv) Click **OK**.



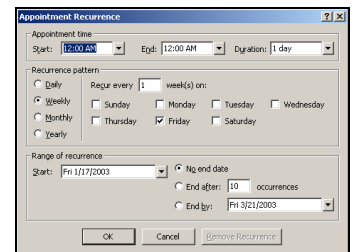
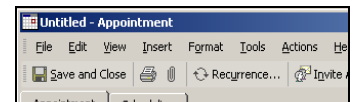
2) Create an Appointment, Meeting or Event

- a) Click on **New** (or double click on the day and time for the new entry).
- b) Enter the subject (*this text will appear on the calendar*).
- c) Enter the location.
- d) Enter the start date and time.
- e) Enter the end date and time.
- f) If this is an All Day Event, with no specified time, click in the box by **All Day Event**.



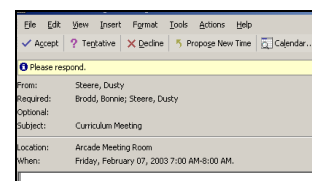
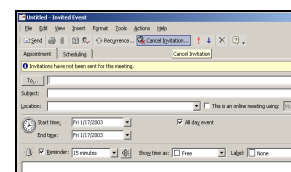
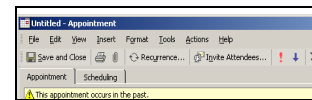
If the event extends over two or more days, like a vacation, set the End date for the last day. A banner will appear at the top of the day(s) on the calendar.

- g) Select desired Reminder
 - i) Remove check in **Reminder** box to eliminate the reminder.
 - ii) Select time prior to start time when reminder will appear.
- h) Color code entry
 - i) Click on box next to **Label**.
 - ii) Select desired color/kind of entry.
- i) For a recurring event: (*event occurs regularly for a period of time*)
 - i) Click on **Recurrence** on the Tool Bar.
 - ii) Specify the Appointment time for all entries of this event.
 - iii) Select the recurrence pattern:
 - (1) Select Daily, Weekly, Monthly or Yearly.
 - (2) Enter the number of weeks.
 - (3) Select the day of the week.
 - (4) Identify the Start date and the End date for recurrence (*selecting no end date will enter the entry forever on the calendar*).
 - (5) Click **OK**.



3) Sending an Invitation (*send an invitation to participants for this meeting event*)

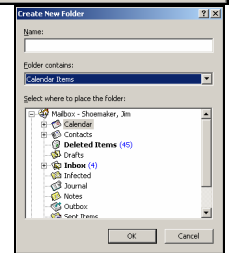
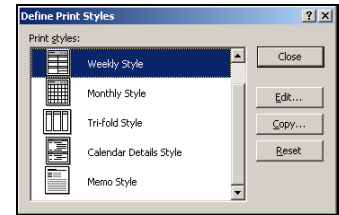
- a) Click on **Invite Attendees...** button on the Tool Bar; a new message with this calendar entry will appear.
- b) Address this message.
- c) Edit anything on this calendar entry to be sent; click **Send**.
- d) Recipients of this invitation will have the option to click on buttons that indicate their preference:
 - i) **Accept** the invitation.
 - ii) **Tentative**, giving tentative acceptance.
 - iii) **Decline** the invitation.
 - iv) **Propose a new time** for the meeting.



- e) Clicking one of the above will send a response back to the originator of the invitation; responses will be tallied on the email for the originator of the invitation.
- f) Click **Save** and **Close**; entry will appear on the calendar.

4) Printing a Calendar

- a) Print a calendar with all entries
 - i) Click on **File** on the Menu Bar and select **Print**.
 - ii) Select the desired Print Style.
 - iii) Click on **Preview** to see what it will look like.
 - iv) If the month view is to be printed and weekends and/or tasks or notes are not desired, click on **Page Setup** and make sure that appropriate checkboxes are not checked.
 - v) Click **Close**, and click **Preview**, or click **OK**.
(Note: available Print Styles will vary depending on the calendar view showing when beginning this print process)
- b) Print a blank calendar (create a new, blank, calendar "folder", then print)
 - i) Click on **File** on the Menu Bar, select **New** and choose **Folder**.
 - ii) Enter a name for this blank calendar.
 - iii) In the **Folder Contains** box, select **Calendar Items**.
 - iv) In the **Select where to place the folder**, click once on **Calendar** to highlight it.
 - v) Click **OK**.
 - vi) In the Folder List, click once on the new calendar folder just created (it will have NO entries).
 - vii) Click on **File** on the Menu Bar and select **Print**; continue with the printing process.

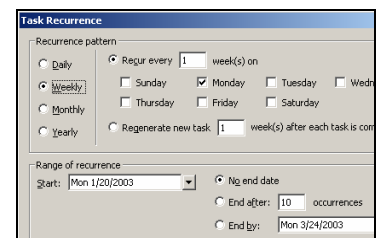
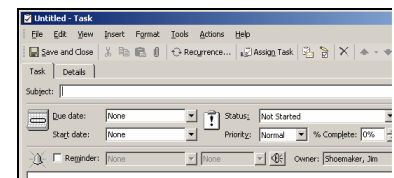


* * * * *

Tasks: (a personal or work-related errand to track through completion).

1) Creating a task

- a) Click on **Tasks** on the Outlook Shortcut Bar.
 - c) Click on **New** to initiate a new Task.
 - d) Enter text for Subject.
 - e) Select **Due date**: click on down arrow and select date from calendar.
 - f) Select **Start date**: click down arrow. Select date from calendar.
 - g) Select **Status**: click on down arrow and select appropriate status.
 - h) Select appropriate Priority.
 - i) **Reminder**: click in box to select Reminder, and select appropriate day and time.
 - j) Enter any information desired in notes area.
 - k) Click on **Recurrence** if task is to reoccur.
 - i) Click on the frequency (Daily, Weekly, Monthly or Yearly) for task to reoccur.
 - ii) Select options for the tasks to reoccur:
 - (1) Every ___ weeks.
 - (2) Click on the day to reoccur.
- OR**
- iii) Click on **Regenerate new task** if task is to reoccur a set amount of time after the completion date.
 - iv) Set desired range of recurrence if desired.
- l) Click **OK** and **Save and Close**.



2) Marking a Task as Complete

- Click on **Tasks** on the Outlook Bar.
- Right click on the task to mark complete, and select **Mark Complete**.

3) Printing a Task

- Click on **Tasks** on the Outlook Bar.
- Click on **File** on the Menu Bar and select **Print**.
- Select Print Style from options in the Print Style box.
- Click **Print**.

4) Coloring a Task

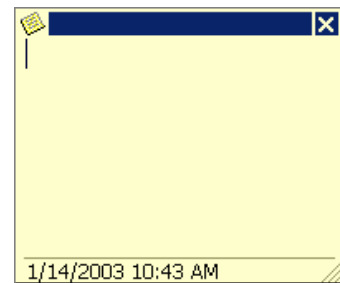
- Overdue tasks are displayed in red.
- Completed tasks are displayed in gray.

* * * * *

Notes: equivalent of paper sticky notes. Can be moved onto an email, forwarded, or moved to the desktop.

1) Creating a note

- Click on **File** on the Menu Bar, choose **New** and select **Note**.
- Enter desired text.
- Click on note icon in upper left corner and choose **Close**.



2) Changing Notes

- Viewing options
 - Click on Notes on the Outlook Bar.
 - Click on Large Icons, Small Icons or List to change how notes are viewed.
- Changing how notes look
 - Click on Tools on the Menu Bar and select Options.
 - Towards the bottom of screen, Click on **Note Options**.
 - Select desired color, size and font.
- Changing individual notes
 - Open a note.
 - Click on the note icon in upper left corner.
 - Click **Save as** to save the note elsewhere on the computer or server.
 - Click on **Delete** to delete the note.
 - Click **Color** and select desired color for this note.
 - Click **Print** to print the note.

