

Windows Outlook Level 4

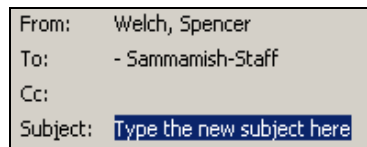
WORKING WITH MESSAGES	1
Renaming the subject of a message	1
Searching for Messages	1
Sorting Messages in the Inbox	1
Changing the Views of Mail Folders	1
Emptying Deleted Items Folder	2
Automatically Spell Checking Messages	2
WORKING WITH OUTLOOK	2
Keyboard Shortcuts	2
Customizing the Toolbar	3
Delivery Options	3
OTHER OUTLOOK FEATURES	3
Scheduling a Meeting	3
Rules for Out of Office Assistant	4
Filtering Out Junk Mail	4
Color Coding Messages	5
Message Templates	5
Working Offline	6
Mail Merge	8

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Working with Messages

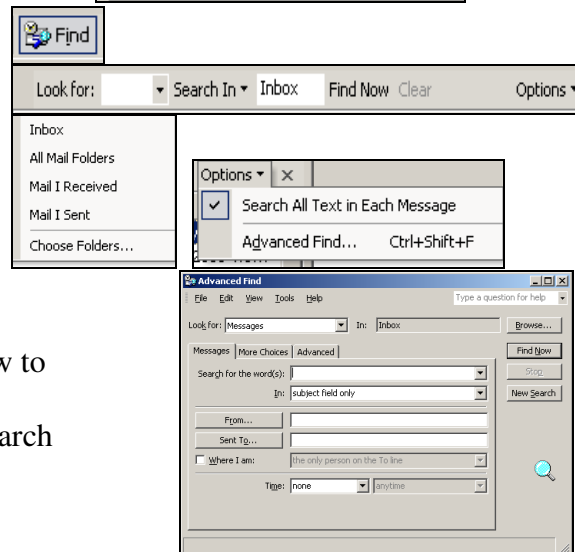
Renaming the subject of a message:

- 1) Open the message you wish rename.
- 2) Click in the subject line and delete the original subject.
- 3) Enter the desired subject.
- 4) Click Yes to save changes.



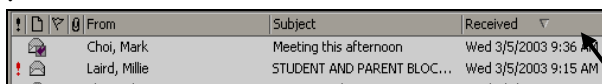
Searching for Messages:

- 1) Click on the **Find** button in the Toolbar.
- 2) Enter a key word in **Look for:**
- 3) Click on the down arrow next to **Search In** and select desired folders.
- 4) Click on **Options** and select **Search All Text** or remove the check to search the subject field only.



Using Advanced Find Feature:

- 1) Click on **Options** and select Advanced Find.
- 2) The default is Messages but click on the down arrow to search for files, notes or tasks.
- 3) The default is your Inbox but click on **Browse** to search other folders.

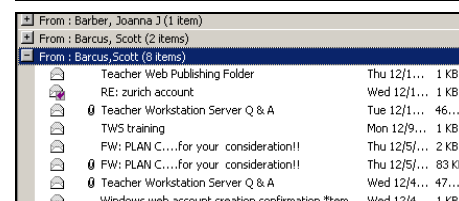
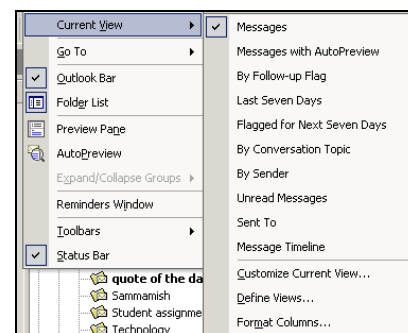


Sorting Messages in the Inbox:

- 1) Using the column headings in your inbox, click to sort messages by sender, subject or date received.
- 2) Columns will sort in ascending or descending order. Note the small arrow in the selected column heading.

Changing the Views of Mail Folders:

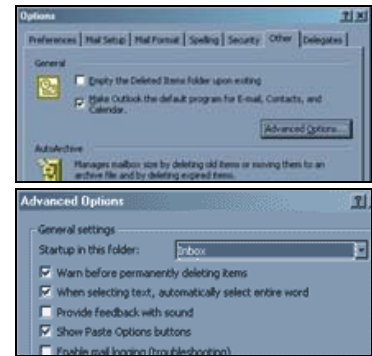
- 1) Under **View** drag to **Current View**. The default is Messages.
- 2) Drag to **By Conversation Topic**. This allows you to follow a set of messages and to see the number of messages for that topic.
- 3) Click on the + to see the related messages.
- 4) Under **View** drag to **By Sender**. This will sort the messages in alphabetical order by sender and give you the number of messages in your Inbox from that sender.
- 5) Click on the + to display the messages.



Emptying Deleted Items Folder:

To Automatically Empty the **Deleted Items** folder:

- 1) On the **Tools** menu, click **Options**, and then click the **Other** tab.
- 2) Check the **Empty the Deleted Items folder upon exiting** box.
- 3) If you want, turn off notification before automatically emptying the **Deleted Items** folder:
 - a) While in **Other Options**, click **Advanced Options**.
 - b) Clear the **Warn before permanently deleting items** check box.
 - c) Click **OK**.
- 4) To exit **Options** window, click **OK**.

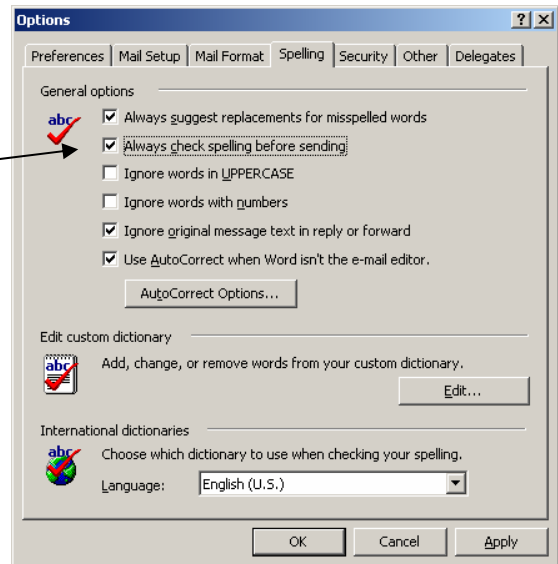


To Manually Empty the **Deleted Items** folder:

- 1) In the **Folder List**, right-click the **Deleted Items** folder.
- 2) Click **Empty "Deleted Items" Folder** on the shortcut menu.

Automatically Spell Checking Messages:

- 1) Under **Tools**, select **Options**.
- 2) Click on **Spelling**.
- 3) Select **Always check spelling before sending**.
- 4) Click **OK**.



Working with Outlook

Keyboard Shortcuts:

To create an new item or file:

- CTRL + SHIFT+A** = Appointment
- CTRL + SHIFT+C** = Contact
- CTRL + SHIFT+L** = Distribution List
- CTRL + SHIFT+E** = Folder
- CTRL + SHIFT+M** = Message
- CTRL + SHIFT+Q** = Meeting Request
- CTRL + SHIFT+K** = Task

For e-mail:

- CTRL + R**= Reply to a message
- CTRL + SHIFT + R**= Reply all
- CTRL + F**= Forward
- CTRL + SHIFT + B**= Display Address Book
- CTRL + SHIFT + I**= Inbox

For Calendar:

- ALT + C** Accept invitation
- ALT + D** Decline invitation

Standard MS Office shortcuts:

- CTRL + X**= Cut
- CTRL + C**= Copy
- CTRL + V**= Paste
- CTRL + P**= Print
- CTRL + A**= Select All
- CTRL + D**= Delete
- F7** = Spelling and Grammar

Other Shortcuts:

- CTRL + E**= Find
- CTRL + SHIFT + F**= Advanced Find
- F1** = Help

Customizing the Toolbar:

To add an icon to the Inbox Toolbar:

- 1) While in the Inbox, under **Tools** drag to select **Customize**.
- 2) Select **Commands** tab.
- 3) Click on **File** under **Categories and Appointment** under **Commands**.
- 4) Drag the **Appointment** icon to the Toolbar in the Inbox.

To remove an icon from the Toolbar:

- 1) While in the **Inbox**, under **Tools** drag to select **Customize**.
- 2) Click on the icon in the Toolbar and drag down and off to remove.

To add an icon to the Message Toolbar:

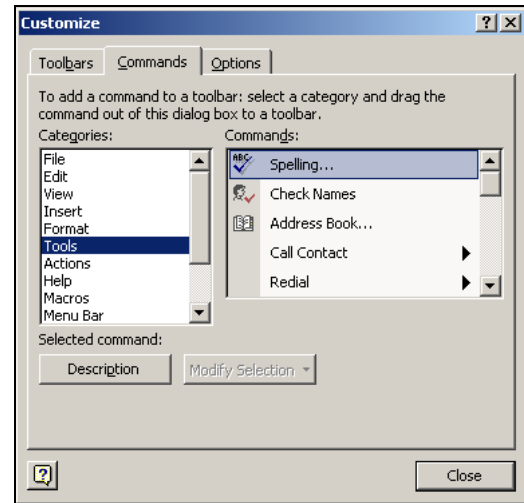
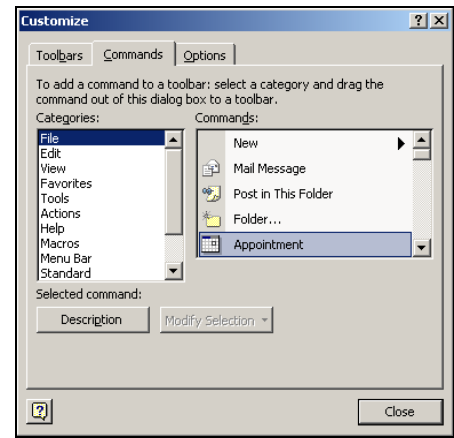
- 1) While in a **New Message**, click in the body of the message, then under **Tools** drag to select **Customize**.
- 2) Select **Commands** tab.
- 3) Click on **Tools** under **Categories and Spelling** under **Commands**.
- 4) Drag the **Spelling** icon to the **Toolbar** in the **Inbox**.

To remove an icon from the Toolbar:

- 1) While in the **Inbox**, under **Tools** drag to select **Customize**.
- 2) Click on the icon in the Toolbar and drag down and off to remove.

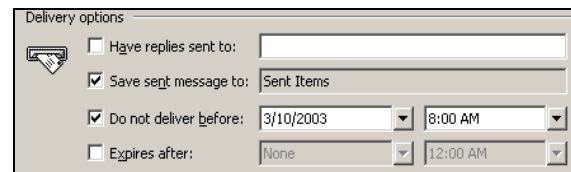
To reset the Toolbar to the default settings:

- 1) Under **Tools**, drag to select **Customize**.
- 2) Click on the **Toolbar** tab.
- 3) Select **Reset** and then **Close**.



Delivery Options: *This feature is not currently available. Do not use.*

- 1) While in a New Message, click on Options.
- 2) Under Delivery options, select **Do not deliver before**.
- 3) Select desired date and time.
- 4) If your message is time sensitive, select **Expires after** and select desired date and time.



Other Outlook Features

Scheduling a Meeting: *when attempting to schedule a meeting, the calendars of participants are accessed to determine a time when everyone is available.*

- 1) Open the calendar.
- 2) Click on **New** to open a New Appointment.
- 3) Enter desired information regarding the meeting (i.e., Subject, Location, Date for proposed meeting, etc.).
- 4) Click on **Scheduling**.

5) Enter the name of an attendee for the meeting (begin to type and the name will automatically enter into the “Click here to add a name” box), and touch **Enter**; likewise, add the names of other attendees.

6) Appointments for the attendees will appear to the right of their names.

7) The top bar will indicate the times when one or more attendee names are busy.

8) Click in a time box to select a time when all attendees are available.

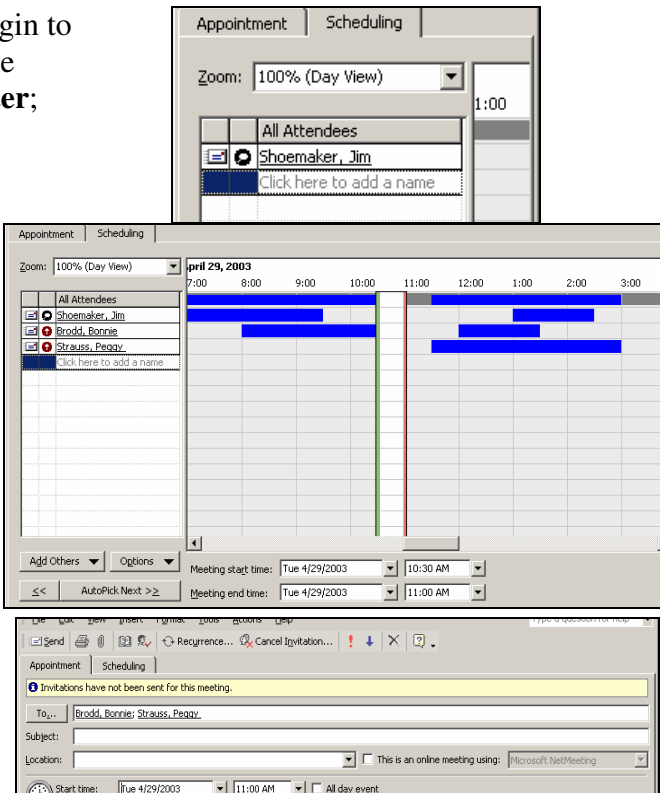
9) Set the “**Meeting end time**” at the bottom of the window.

10) Click on **Appointment**.

11) Check over and edit the Appointment information.

12) Click **Send** to send the invitation to the attendees.

13) Responses to the invitation will be available for the person who originates the invitation.



Rules for Out of Office Assistant: *rules allow for options when using this function; rules created in Out of Office Assistant run only when Assistant is turned on!*

1) While in the Inbox, click on **Tools** on the Menu Bar and **select Out of Office Assistant**.

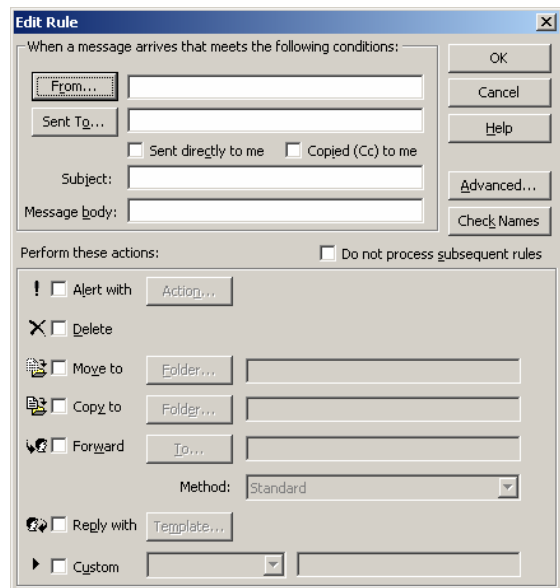
2) Click **Add Rule**.

3) Under “**When a message arrives that meets the following conditions:**” specify the conditions of the rule that the message must meet in order for an action to occur.

4) Under “**Perform these actions,**” specify the desired options (more than one option can be selected).

5) Click **OK**.

6) To activate the Out of Office Assistant, click on button next to “**I am currently Out of the Office**” and click **OK**.

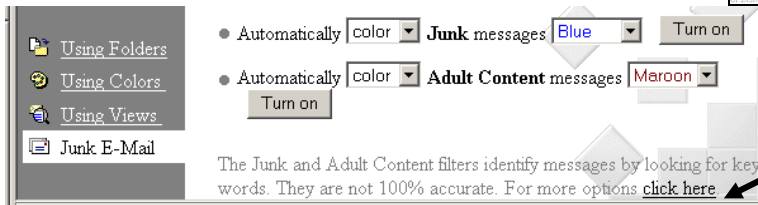
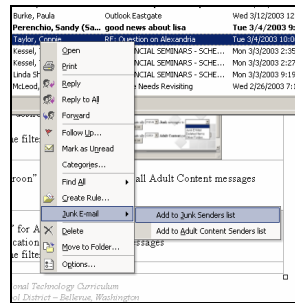
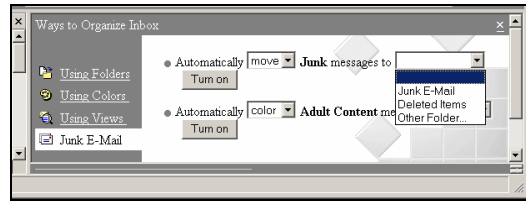


Filtering Out Junk Mail: *to specify a way of dealing with junk email (junk email and Adult Content email); Outlook contains a “Junk Senders” list that can be added to.*

1) Click on the **Organize** button on the Tool Bar.



- 2) Click on **Junk E-Mail**.
 - a) To move all Junk messages:
 - i) Click on window displaying “Color” and select “**Move**”
 - ii) Click on the blank box and select the desired location (Deleted Items) for Junk messages.
 - iii) Click “**Turn On**” button to activate the filter.
- 3) To add messages to the Junk Mail list:
 - a) **Right-Click** on a message to be identified as Junk Mail
 - ii) Select **Junk Mail**, and **Add to the Junk Mail senders list**
 - c) Messages from that sender will be added to the appropriate list and filtered as desired



- 4) To Edit the Junk Senders List:
 - a) Click on **Organize**.
 - b) Click on **Junk Email**.
 - c) Select the link for more options.
 - d) Select **Edit Junk Senders**.
 - e) **Edit or Delete**.
 - f) Click **OK**.

Color Coding Messages:



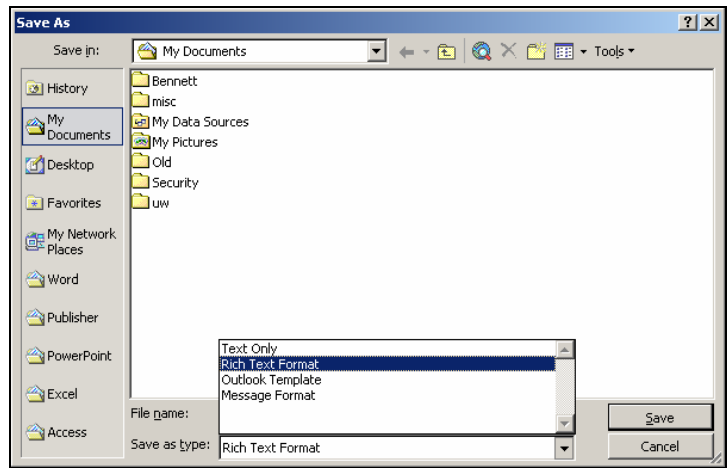
- 1) Click on **Organize** in the Toolbar
 - a) Select a Color
 - b) Select **from** or **sent to**
 - c) Click on a message in your Inbox to select the person
 - d) Click on **Apply Color**
 - e) To color messages sent only to you (not a distribution list), select a color and the click **Turn On**



Message Templates: *creating a template for a message to be frequently used (i.e., a message that would require only slight modifications like reporting on a student’s progress); the message, when launched would come up as a New Message.*

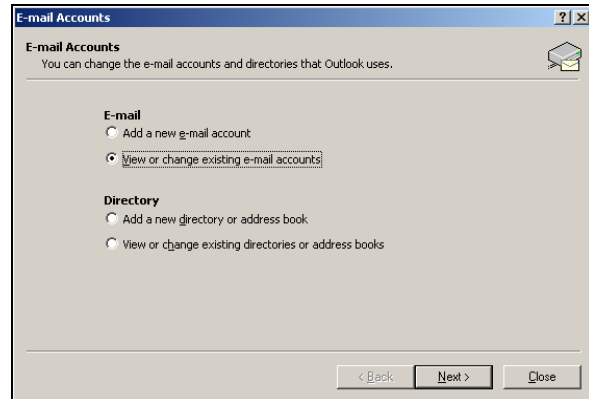
- 1) Open a **New Message**.
- 2) Enter the desired text in the Subject, and in the body of the message.
- 3) Click on File and select **Save As**.

- 4) Click on **Save as type:** and select **Outlook Template**.
- 5) Click on My Documents
- 6) Click **Save**; the message will be there whenever the template is needed; click on the template, complete the message and send it. (When the template is opened, it will always come up as an untitled message).

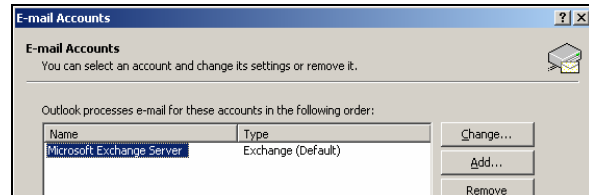


Working Offline: *Working offline gives access to information regardless of connection to email server. This feature is problematic when VPN is used. Loss of data may occur.*

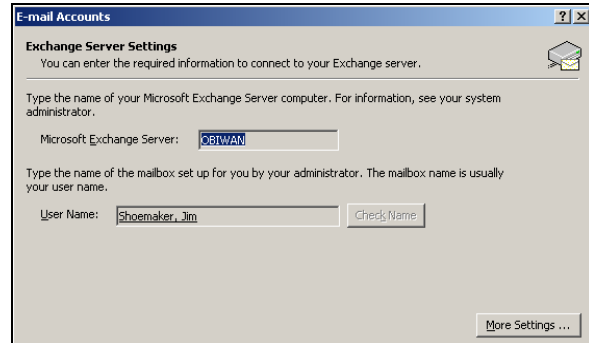
- 1) Set up offline folders (the following process will make these folders available offline: Inbox, Outbox, Deleted Items, Sent Items, Calendar, Contacts, Tasks, Journal, Notes and Drafts)
 - a) Click on **Tools** on the Menu Bar, and then choose **E-Mail Accounts**.
 - b) Click on **Next**.



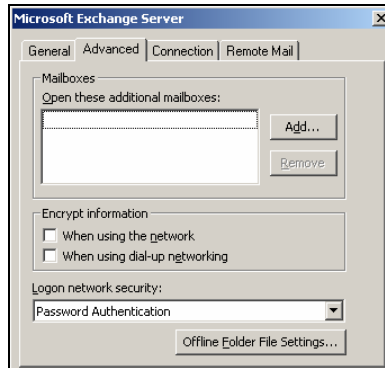
- c) Click **Change**.



- d) Click **More Settings**.



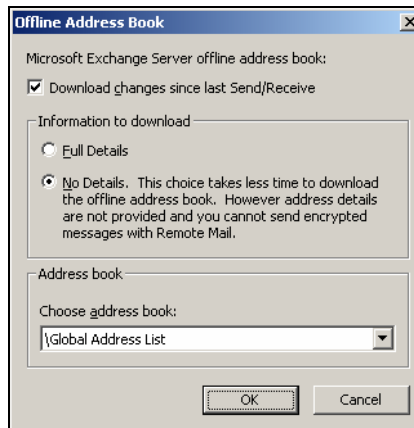
- e) Click **Advanced** tab and then click **Offline Folder File Settings** button.



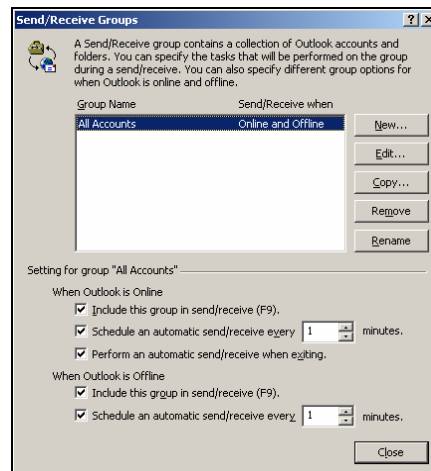
- f) In File box the path should be:
Data\Microsoft\Outlook\outlook.ost.
- g) Click **OK**.
- h) Click **Yes** on prompt to create this folder.
- i) Click **OK** again and then click **Cancel**.



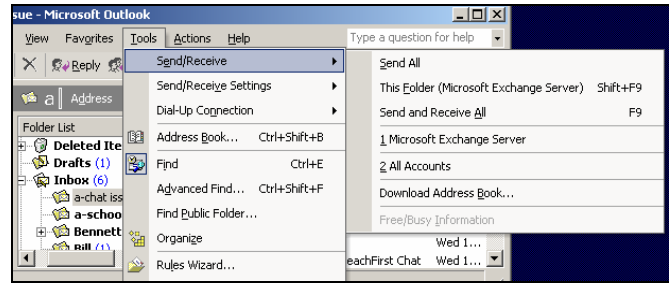
- 2) Make Address Book Available Offline:
 - a) Click on **Tools** on the Menu Bar, choose **Send/Receive** and select **Download Address Book**.
 - b) Click **Full Details** (if encryption is desired) OR **No Details** for a quicker download.
 - c) Click **OK**; Address Book will download from Exchange server.



- 3) To Automatically Synchronize Folders (folders will synchronize automatically when starting up and shutting down Outlook when online):
 - a) Click on **Tools** on the Menu Bar, choose **Send/Receive Settings** and select **Define Send/Receive Groups**.
 - b) Under the **When Outlook is online** select the desired check boxes.
 - c) Under the **When Outlook is offline** select the desired check boxes.
 - d) Click **Close**.



- 4) To Manually synchronize folders:
 - a) To synchronize the selected folder:
 - i) Click (select) the folder to be synchronized.
 - ii) Click on **Tools** on the **Menu Bar**, choose **Send/Receive**, and select **This Folder**.
 - b) To synchronize **ALL** folders for offline use, click **Tools** on the **Menu Bar**, choose **Send/Receive** and select **Send and Receive All** (or press F9).



Mail Merge: *it is possible to use the information from the Contacts folder in a WORD document for form letters or labels. The process involves exporting the Contacts information, and using that data source to mail merge into a WORD document. Which contacts are to be used for mail merge can be identified in two ways:*

- *Select contacts from Contact list by clicking on them while holding down the CTRL key*
 - *Creating a separate contacts folder and copying only desired contacts to that folder*
- 1) Click on **Contacts** on the Outlook Bar.
 - 2) Click on the desired Contacts folder, or select the desired contact. For multiple contacts hold down the CTRL key.
 - 3) With desired contacts showing, click on **Tools** on the Menu Bar and select **Mail Merge**.
 - 4) Under **Contacts**, click on desired option.
 - 5) Under **Fields to merge**, click on desired option.
 - 6) To merge into a new document, click on **OK**.
 - 7) WORD will be launched with the mail merge tool bar displayed.
 - 8) Complete the mail merging process using WORD.

