

MICROSOFT OUTLOOK 2003 INTERMEDIATE

I. REVIEW MICROSOFT OUTLOOK 2003	2
II. CUSTOMIZING THE NAVIGATION PANE	2
A. ADDING/REMOVING GROUPS TO/FROM THE NAVIGATION PANE	3
B. ADDING/REMOVING SHORTCUTS TO/FROM THE NAVIGATION PANE.....	4
III. INBOX	5
A. SETTING E-MAIL PREFERENCES	5
B. BCC – BLIND CARBON COPY	7
C. OUT OF OFFICE ASSISTANT	8
D. RECALLING SENT MESSAGES.....	8
IV. CALENDAR	9
A. CALENDAR OPTIONS	9
B. REQUESTING MEETINGS	10
C. MODIFYING APPOINTMENTS AND EVENTS	12
V. CONTACTS	12
B. vCARDS	14
VI. TASKS	14
A. RECURRING TASKS	14
B. REGENERATING TASKS	15
VII. ARCHIVING FILES	17
VIII. DELEGATING ACCESS TO FOLDERS	19

I. Review Microsoft Outlook 2003

Microsoft Outlook 2003 is application software included in the Microsoft Office 2003 Professional Suite. Used to manage information, Outlook organizes your e-mail, schedule of events and activities, tasks, and notes among other things.

Although Outlook comes with specific folders for the different items, you can add additional folders to better organize everything.

To Create Additional Folders:

1. In the menu bar, choose **File, New, Folder** to open the Create New Folder dialog box (Fig. 1)

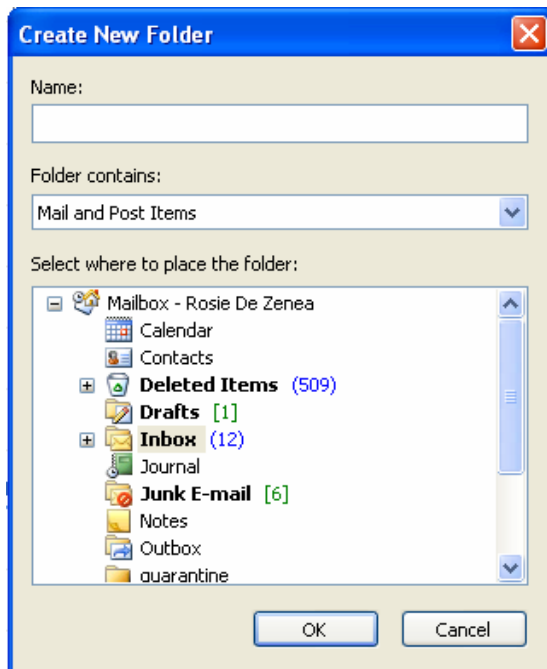


Fig. 1

2. Enter the name for the new folder
3. Choose what the folder will contain (for e-mail choose mail items)
4. Select where to place the folder within Outlook
5. Choose **O. K.** to close the Create New Folder dialog box

II. Customizing the Navigation Pane

The Navigation Pane (Fig.2), located on the left hand side of every Outlook window by default, contains shortcuts to the different folders within Outlook. This bar is divided into four different groups, Outlook Shortcuts, My Shortcuts, and Other

Shortcuts. To view the shortcuts for each group, click on the gray tab displaying the name of the group.

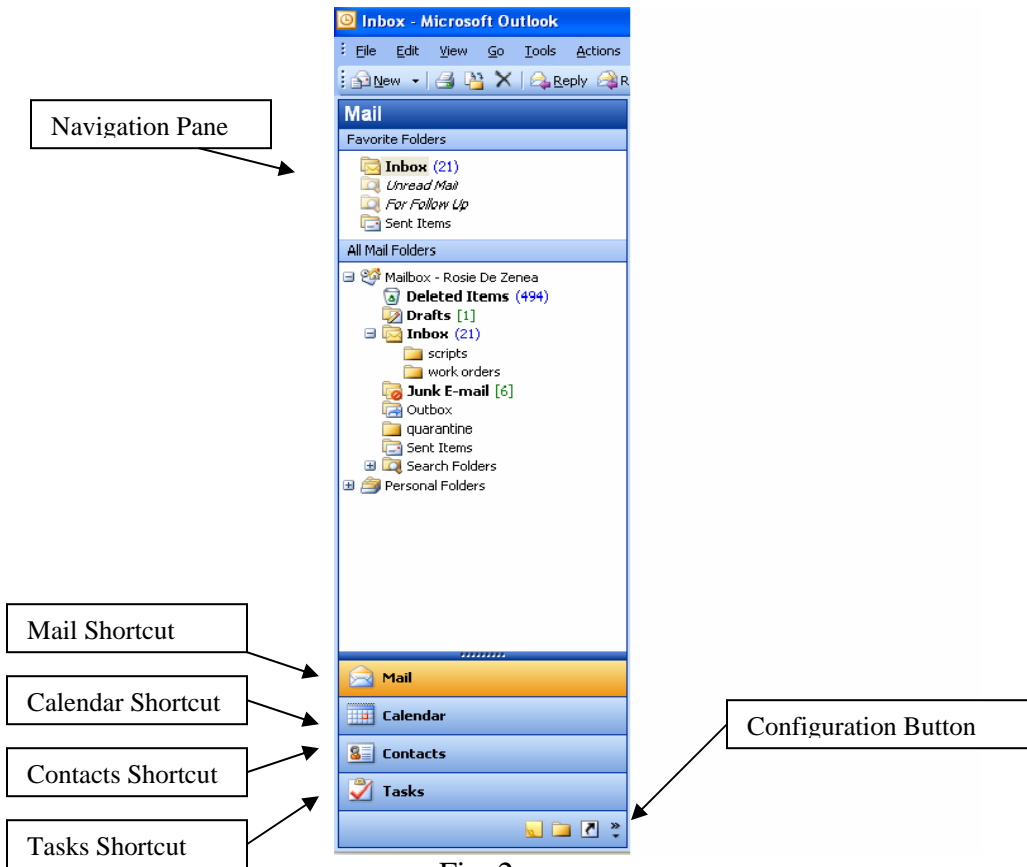


Fig. 2

The Navigation Pane can be customized to add or remove groups and shortcuts. Additionally, shortcuts can be moved from one group to another.

A. Adding/Removing groups to/from the Navigation Pane

Besides the four default groups, additional groups can be added to the Navigation Pane to include additional shortcuts. Groups that are added as well as the default groups can be removed from the bar also.

To Add a Group to the Navigation Pane:

1. Click on the Configuration Button.
2. Select **Show more Buttons** (a new group will appear at the bottom of the Navigation Pane) or Select **Add or Remove Buttons** and select the group you want to add.

To Remove a Group from the Navigation Pane:

1. Click on the Configuration Button.
2. Select **Show fewer Buttons** (a group will disappear from the bottom of the Navigation Pane) or Select **Add or Remove Buttons** and select the group you want to Remove.

B. Adding/Removing shortcuts to/from the Navigation Pane

Another way to customize the Navigation Pane is to add or remove shortcuts in your Shortcuts Folder. This can be done either by creating a new shortcut, or by simply moving a shortcut from one group to another.

To Open the Shortcut Folder

1. Click on the Configuration Button
2. Select the **Add or Remove Buttons**
3. Click on **Shortcuts**

To Add a New Shortcut to a Group:

1. Select the group to add a shortcut to
2. Right click on the Group
3. Select **Add new shortcut...** to open the Add to Navigation Pane dialog box (Fig.3) or click **Add New Shortcut** on the Navigation Pane.

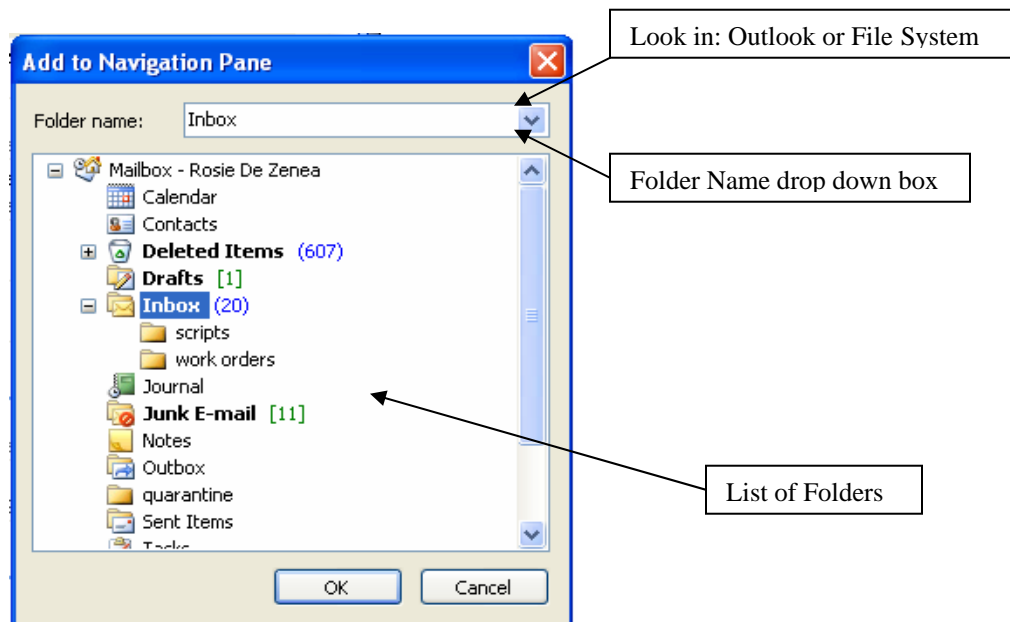


Fig. 3

4. Choose where to look in for the shortcut, **Outlook** or **File System**

5. Choose the folder to add a shortcut for either from the **Folder name** drop down box, or from the list of folders
6. Hit **O. K.**

To Move a Shortcut From One Group to Another:

1. Select the group where shortcut currently is located
2. Select the shortcut to move
3. Holding the left mouse button down, drag the shortcut to the new group (notice how a black line appears when you begin dragging the shortcut)
4. Hold the arrow over the name of the new group until it opens
5. Release the mouse to drop the shortcut in the new group

To Remove a Shortcut From a Group:

1. Select the group from where the shortcut will be removed
2. Right click on the shortcut to remove
3. Select **Remove Shortcut**
4. When prompted, choose **Yes** to remove shortcut

III. Inbox

A. Setting e-mail preferences

Setting e-mail preferences control the way all e-mail messages are sent out and received. Message options can be set for individual messages as well. Doing this will be done from the message itself rather than from the inbox.

To Set E-mail Preferences:

1. In the menu bar, select **Tools, Options...** to open the Options dialog box (Fig. 4)

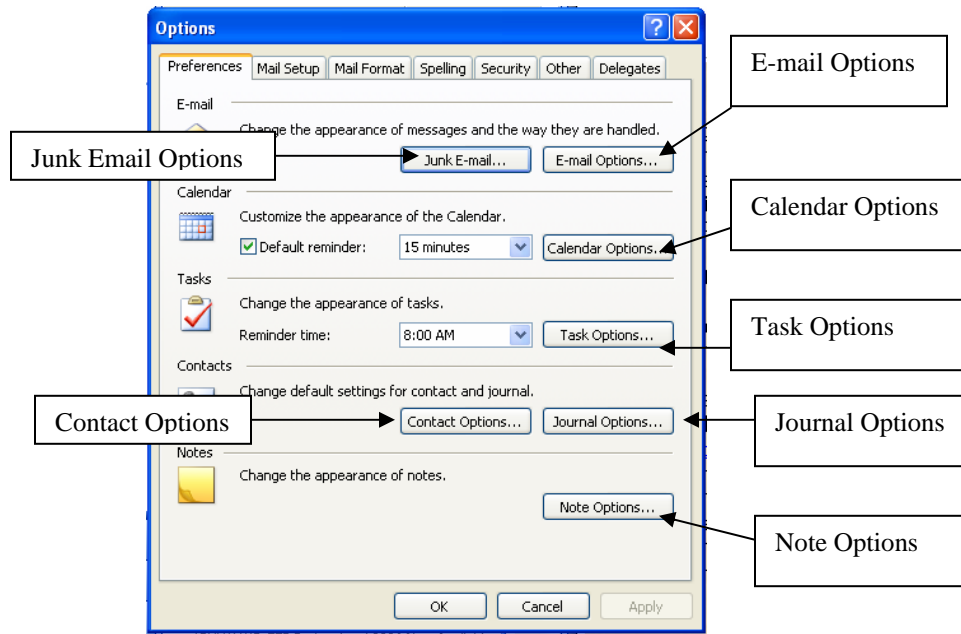


Fig. 4

2. In the Preferences tab select **E-mail Options...** to open the E-mail Options dialog box (Fig. 5)

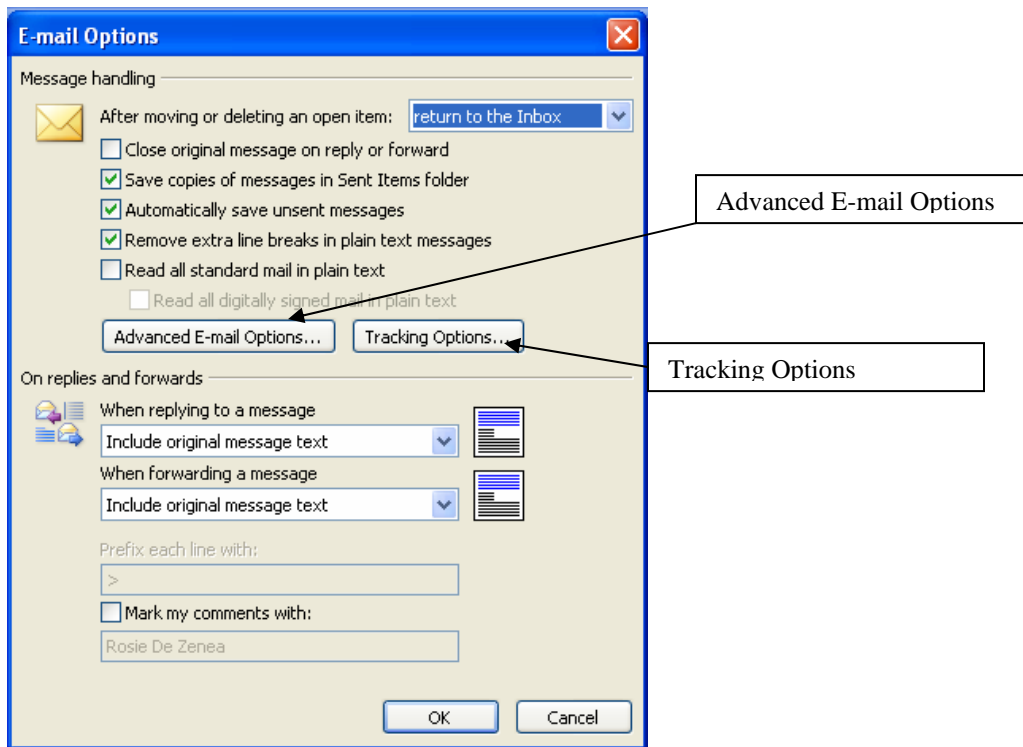


Fig. 5

3. Make the desired selections
4. Choose **O. K.** to close the E-mail Options dialog box
5. Choose **O. K.** to close the Options dialog box

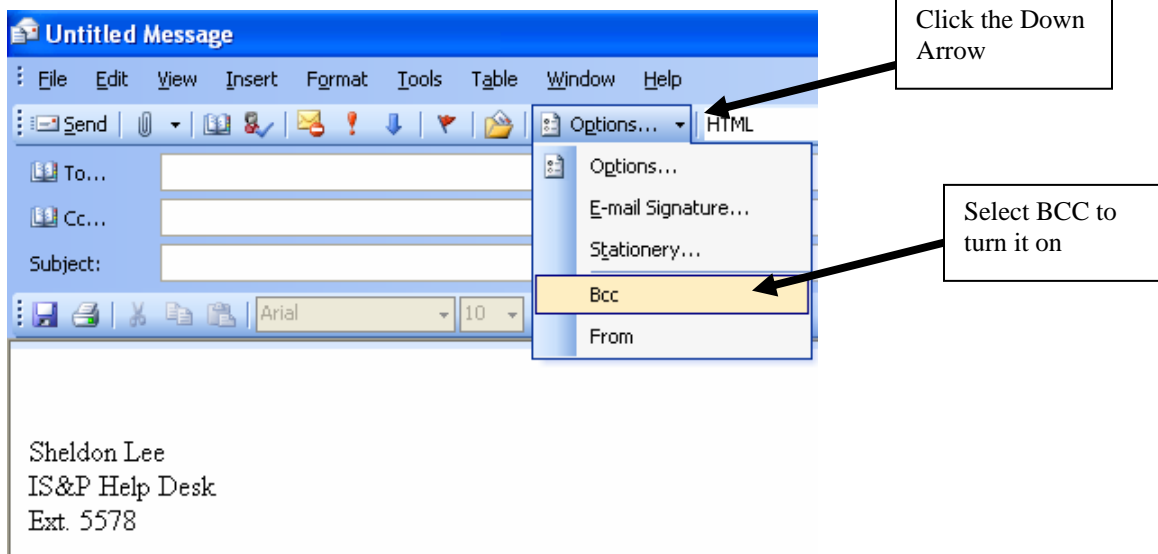
To Set Advanced E-mail or Tracking Options:

1. In the menu bar, select **Tools, Options...** to open the Options dialog box (Fig. 4)
2. In the Preferences tab select **E-mail Options...** to open the E-mail Options dialog box (Fig. 5)
3. Select **Advanced E-mail Options** or **Tracking Options**
4. Make the desired selections
5. Choose **O. K.**
6. Choose **O. K.** to close the E-mail Options dialog box
7. Choose **O. K.** to close the Options dialog box

B. BCC – Blind Carbon Copy

There are times when you need to send out a message to people without them knowing who you have sent the message to. Using the BCC field, you can send messages so that the recipients only see their name/address. By default, the BCC field is turned off. To have the BCC field always available:

1. Open a new email message
2. On the toolbar, click the down arrow next to the **Options** button. Not the **Options** button itself.
3. From the dropdown menu, select **Bcc**. This put a check mark next to **Bcc**. The BCC field will remain visible in all future emails.



C. Out of Office Assistant

Since e-mails may be delivered to your mailbox even when you are away from the office for an extended period of time, Outlook can be set up to automatically reply to anyone who e-mails you, letting them know that you are out of the office. Using the Out of Office Assistant, you can customize a reply to any e-mails sent to you while you are out.

To Set the Out of Office Assistant:

1. Open the Inbox information viewer
2. Select **Tools, Out of Office Assistant...** to open the Out of Office Assistant dialog box (Fig. 6)

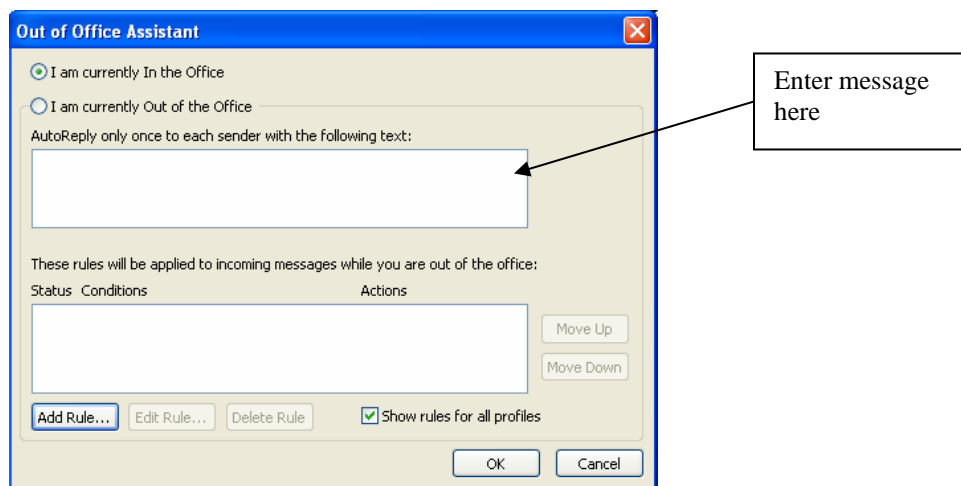


Fig. 6

3. Select **I am currently Out of the Office**
4. Enter a message to reply with
5. Choose **O.K.** to close Out of Office Assistant dialog box

D. Recalling Sent Messages

Messages that have been sent can sometimes be recalled. If the recipient has Outlook running, they are logged on to Exchange, they have not opened the message, and the e-mail is in their Inbox folder (not another folder they created), then the message can be recalled successfully. It is recommended that you send read receipts with each message, that way you know whether a message has been read or not.

To Recall a Message:

1. Open the Sent Items information viewer

2. Open the message you want to recall
3. Select **Actions, Recall This Message...** to open the Recall This Message dialog box (Fig. 7)

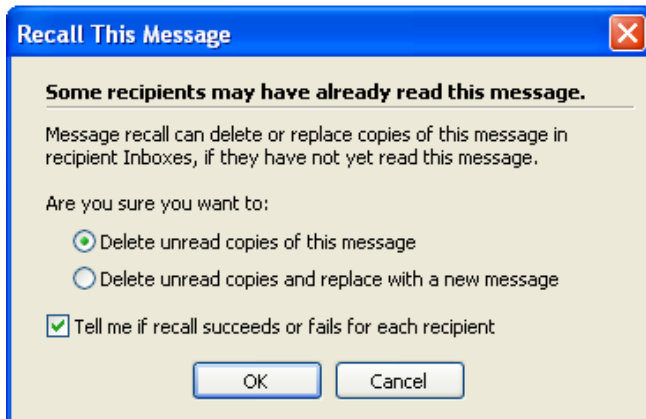


Fig. 7

4. Choose between the two options listed to recall the message
5. Select the option to be notified whether the recall succeeds or fails
6. Choose **O. K.** to close the Recall This Message dialog box

IV. Calendar

A. *Calendar Options*

The default Outlook Calendar displays the workweek as being Monday through Friday from 8:00 to 5:00. However, some business may have different days and hours of operation. In this case, you could customize the calendar to the correct time zone, workweek, holiday schedule and other options.

To Set the Calendar Options:

1. Open the Calendar information viewer
2. Select **Tools, Options...** to open the Options dialog box (Fig. 4)
3. Select **Calendar Options** to open the Calendar Options dialog box (Fig. 8)

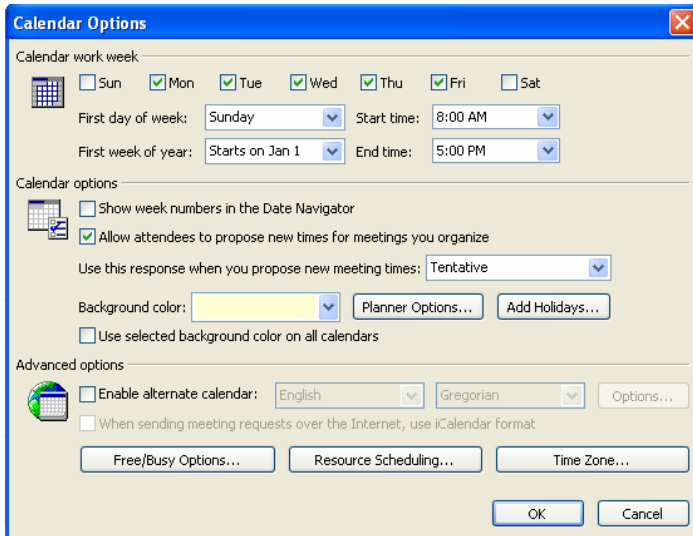


Fig. 8

4. Select the desired settings
5. Choose **O. K.** to close Calendar Options dialog box

B. Requesting Meetings

With Outlook, you can invite people to meetings via e-mail and schedule it on their calendars. If available, the sender can check the recipient's schedule before sending the invitation to see what is the best available time.

To Request a Meeting:

1. Open Outlook
2. In the menu bar, select **New, Meeting Request** to open the Meeting Request form (Fig. 9)

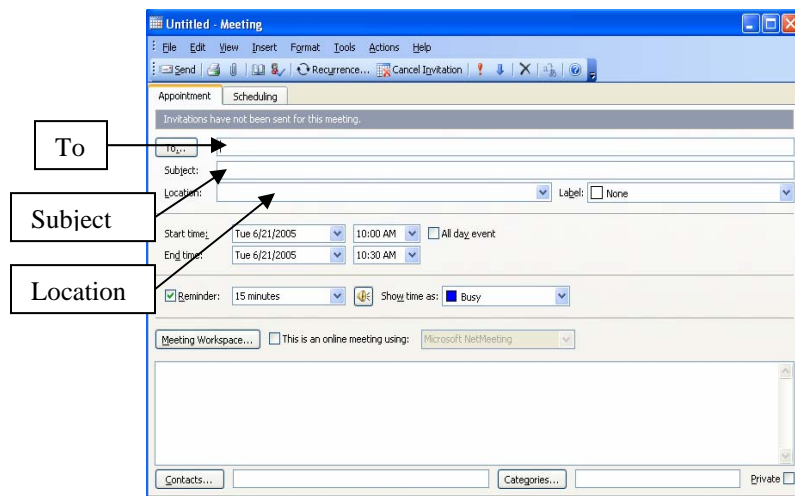


Fig. 9

3. Enter the e-mail address of the people to invite in the **To:** box
-OR-
Select **To:** to open the Select Attendees and Resources dialog box (Fig. 10) and select the names of the people to invite from the left hand column in the dialog box and move them to the **Required** or **Optional** boxes. Select **O. K.**

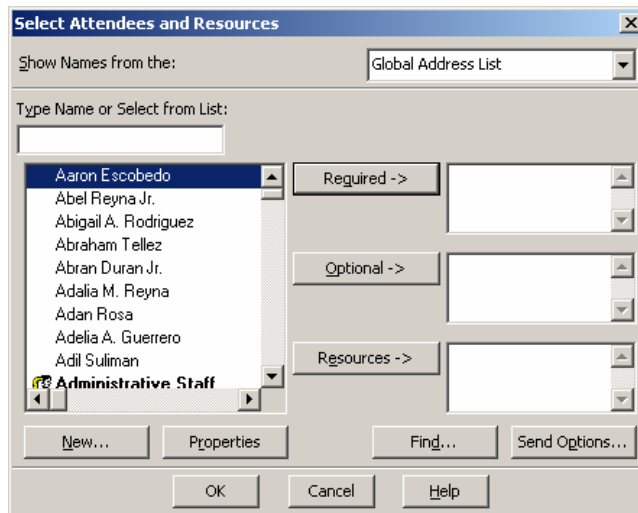


Fig. 10

4. Enter a subject and location for the meeting
5. Select the **Attendee Availability** tab to check when the attendees will have available time to meet
6. Select the **Appointment** tab and enter an appropriate day and time for the meeting
7. Hit **Send**

When you send a meeting request, the recipient will receive a message in their inbox containing the information provided on the Meeting Request form along with three options: Accept, Tentative, and Decline.

To Respond to a Meeting Request:

1. Open the Inbox information viewer
2. Open the message sent requesting a meeting
3. Choose **Accept**
-OR-
Choose **Tentative**
-OR-
Choose **Decline**
4. Select **Edit the response before sending**
-OR-
Select **Send the response now**
-OR-

Select **Don't send a response**

After accepting or tentatively accepting a meeting request, the appointment will appear on your calendar.

C. Modifying Appointments and Events

All appointments and events on the calendar can be modified or changed by the user, except those that have placed there through meeting requests. Only the requester can make changes to meetings that have been scheduled using the Meeting Request form. To Modify Appointments and Events:

1. Open the Calendar information viewer
2. Select the calendar item to modify and open it
3. Make changes to the item as needed
4. Choose **Save and Close**

V. Contacts

Within the Contacts folder, you can add a Personal Address Book where you can keep information on contacts you use frequently.

To Add a Personal Address Book:

1. Open Outlook
2. In the menu bar, choose **Tools, Email Accounts** to open the Email Account dialog box (Fig. 11)

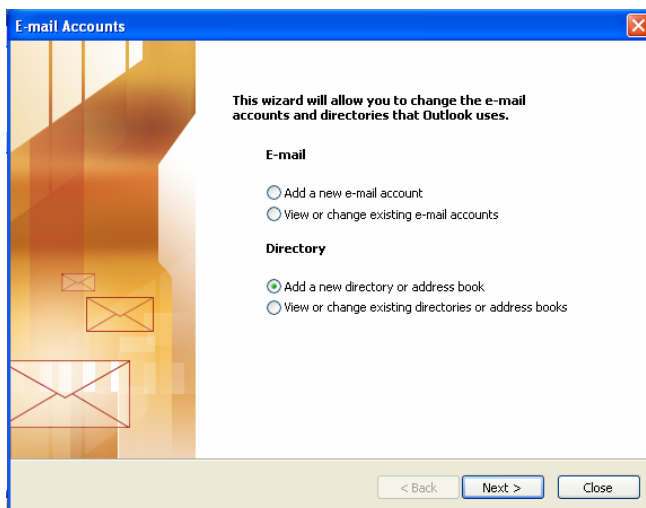


Fig. 11

3. Choose **Add a new directory or address book**.
4. Choose **Additional Address Books** to open the Other Address Book Types dialog box (Fig. 12)

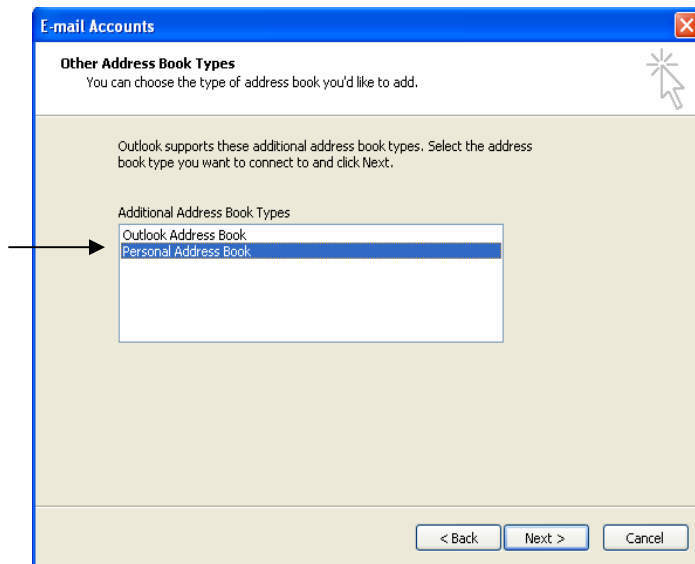


Fig. 12

4. Select **Personal Address Book** from the list
5. Click **Next**.
6. Outlook will open the Personal Address Book dialog box (Fig. 13). Enter a name for the personal address book and select to show names by first name or last name

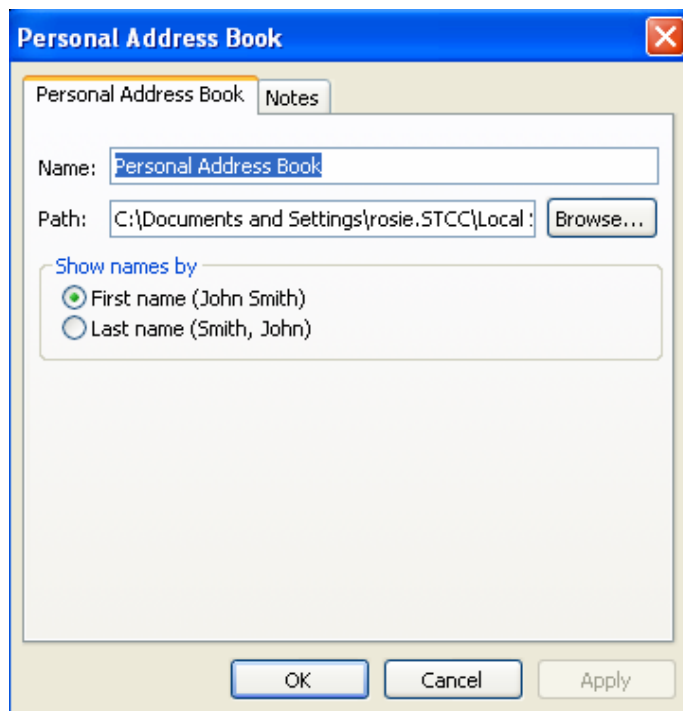


Fig. 13

7. Select **O.K.** to close the Personal Address Book dialog box
8. Select **O.K.** to close the Outlook message
9. Select **O.K.** to close the Services dialog box

B. vCards

A vCard is basically an electronic form of a business card. When a contacts information is entered in Outlook, the information can be forwarded via e-mail as a vCard.

To Forward a Contacts Information Using a vCard:

1. Open the Contact information viewer
2. Select the contact to forward
3. In the menu bar, select **Actions, Forward as vCard**
4. Address the e-mail
5. Hit **Send**

VI. Tasks

A. Recurring Tasks

Tasks like appointments can be set up to occur on a regular basis. For example, a report that has to be done on a bi-weekly basis is a recurring task.

To Enter Recurring Tasks:

1. Select **File, New**
-OR-
Select the **New** icon to open the Task form
2. Enter the task information
3. Select the **Recurrence** button to open the Task Recurrence dialog box (Fig. 14)

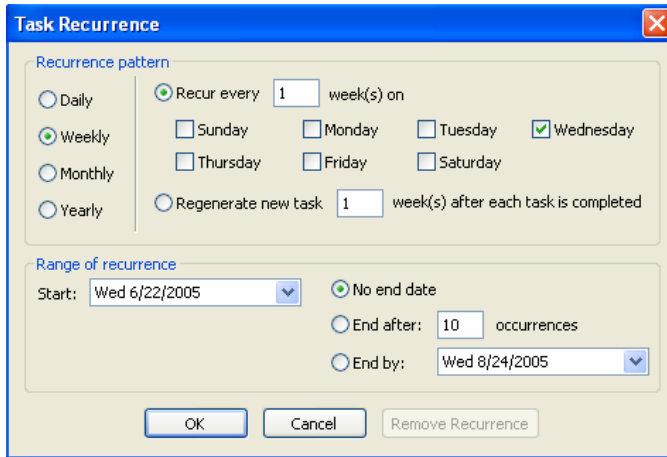


Fig. 14

4. Choose the recurrence pattern
5. Select O. K. to close the Task Recurrence dialog box
6. Select **Save and Close** to close the Task form

B. Regenerating Tasks

Tasks that occur on a regular basis and after the completion of another task are regenerating tasks. For example, proof reading a document after it has been written.

To Enter Regenerating Tasks:

1. Select **File, New**
-OR-
Select the **New** icon to open the Task form
2. Enter the task information
3. Select the **Recurrence** button to open the Task Recurrence dialog box (Fig. 14)
4. Choose the recurrence pattern
5. Select **Regenerate new task**
6. Enter the number of weeks
7. Select **O. K.** to close the Task Recurrence dialog box (Fig. 14)
8. Select **Save and Close** to close the Task form

C. Assigning Tasks

You can assign a task to someone else in two ways. By creating a task for yourself and then offering it to somebody else, or by sending a task request.

To Assign an Existing Task to Someone Else:

1. Open the task to assign

2. Select the **Assign Task** button to open the modified Task form (Fig. 15)

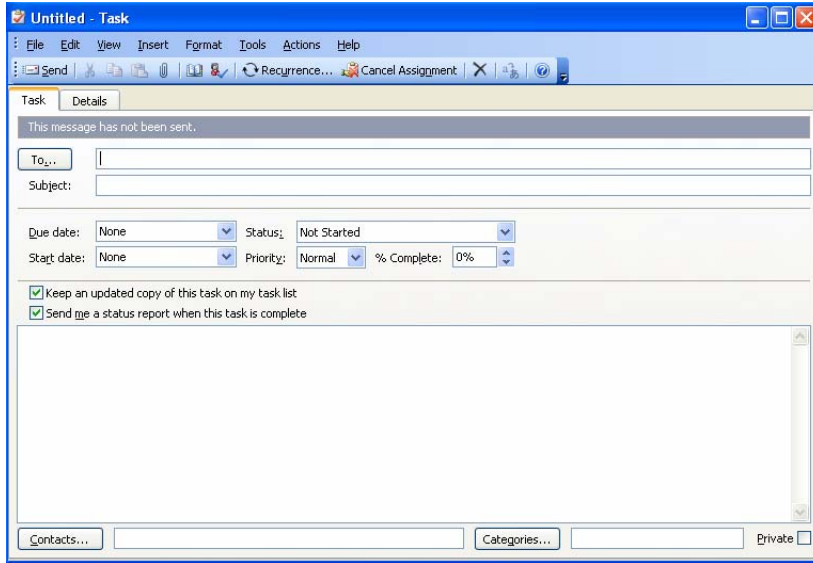


Fig. 15

3. Enter the recipients e-mail address in the **To:** field

-OR-

Select **To:** to open the Select Task Recipients dialog box and select the names of the people to assign the task to from the left hand column in the dialog box and move them to the **To** boxes. Select **O. K.**

4. Select **Send**

To Send a Task Request:

1. Open the Task information viewer

2. Select **New, Task Request** to open the form shown in Fig. 15

3. Enter the recipients e-mail address in the **To:** field

-OR-

Select **To:** to open the Select Task Recipients dialog box and select the names of the people to assign the task to from the left hand column in the dialog box and move them to the **To** boxes. Select **O. K.**

4. Enter the information for the task

5. Select **Send**

When a task is assigned or a task request is sent to someone, a message will appear in the recipients inbox

To Respond to a Task Request:

1. Open the Inbox information viewer

2. Open the message task request

3. Choose **Accept**

- OR-
Choose **Decline**
4. Select **Edit the response before sending**
- OR-
Select **Send the response now**

The task will be included to your task list if accepted.

VII. Archiving Files

Another way to organize Outlook is to archive files that have reached a certain age. When files are archived, they are either copied to another folder or deleted all together. Outlook will, by default, automatically archive some folders, including the Calendar, Deleted Items, Journal, Sent Items, and Tasks folders. The Contacts folder is the only one that cannot be automatically archived, all of them however can be manually archived.

To Set the AutoArchive Feature for Each Folder:
(The Inbox will be used as an example)

1. Open Outlook
2. On the Outlook Bar, right click on the shortcut to the folder you want to archive
3. Select **Properties** to open the folder's Properties dialog box (Fig. 16)

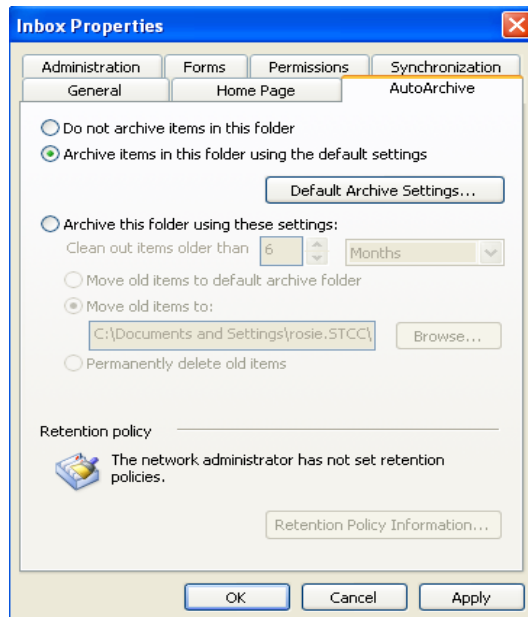


Fig. 16

4. Select the **AutoArchive** tab
5. Select **Archive this folder using these settings**

6. Select **Clean out items older than**
7. Enter a number
8. Select Months, Weeks, or Days
9. Select to **Move old items to:** and specify the file to move them to
-OR-
Select **Permanently delete old items**
10. Select **Apply** to close the Properties dialog box

Please note, the steps above need to be performed for each folder in order for the AutoArchive feature to be activated.

After the AutoArchive settings for each folder have been set, go to the AutoArchive dialog box (Fig. 17) to set the properties for the AutoArchive feature.

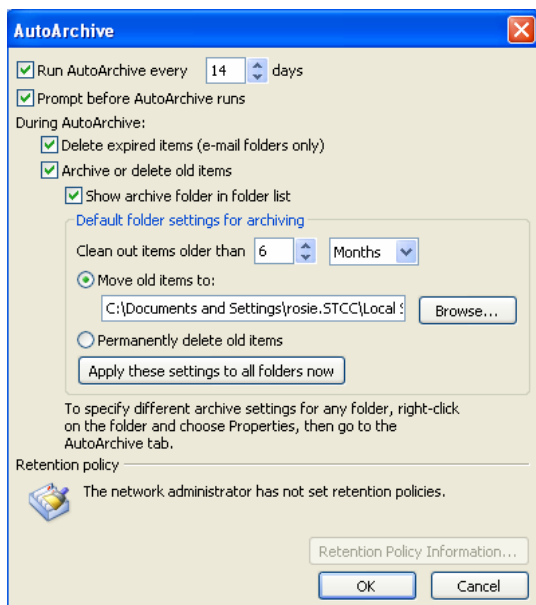


Fig. 17

To Manage Set the AutoArchive Feature:

1. Open Outlook
2. Select **Tools, Options** to open the Options dialog box (Fig. 4)
3. Select the **Other** tab
4. Select **AutoArchive** to open the AutoArchive dialog box (Fig. 17)
5. Select the desired settings, and specify the file to move the items to
6. Select **O. K.** to close the dialog box

To Retrieve Archived Items:

1. Open Outlook
2. Select **File, Open, Outlook Data File**
3. Select the **Archive** file

4. Select O.K.

The file will appear in your Outlook folder list.

VIII. Delegating Access to Folders

Outlook allows you to give other people access to your folders without giving them your password. You can give people permission to view, edit, or add items to your folder depending on how much you let them do.

To Delegate Access to Folders:

1. Open Outlook
2. Select **Tools, Options**
3. Select the **Delegates** Tab to open the Delegates dialog box



Fig. 18

4. Select **Add...**
5. Select the user or users to grant access to
6. Select **O. K.** to open the Delegate Permissions dialog box (Fig. 19)

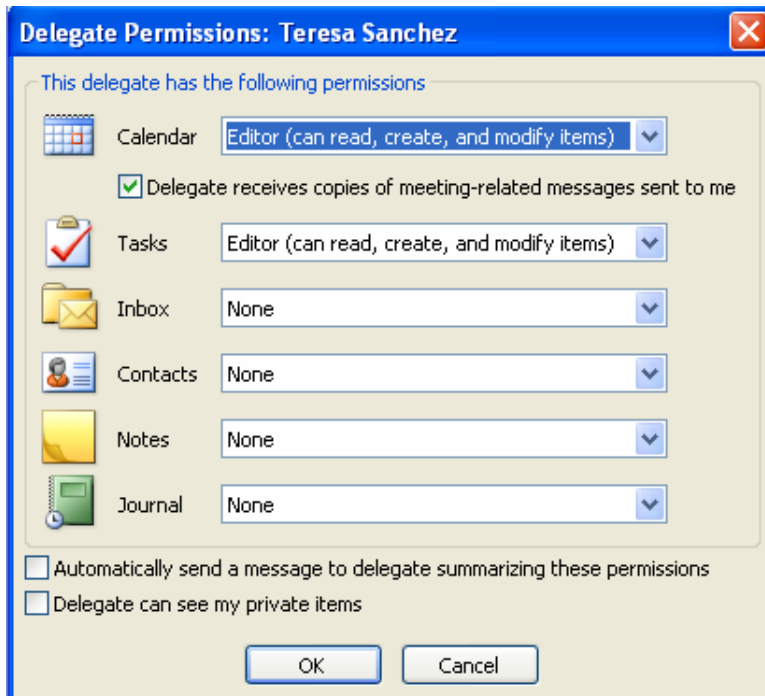


Fig. 19

7. Select the folders to give access to
8. Use the drop down arrow to select what kind of access the user will be granted
9. Select **O. K.** to close the Delegate Permissions dialog box
10. Select **Apply**
11. Select **O. K.** to close the Delegates dialog box

To Remove Access to Folders:

1. Open Outlook
2. Select **Tools, Options**
3. Select the **Delegates** Tab to open the Delegates dialog box
4. Select the name of the user to remove
5. Select **Remove**
6. Select **O. K.** to close the Delegates dialog box