

The smarter, faster guide to Microsoft Outlook

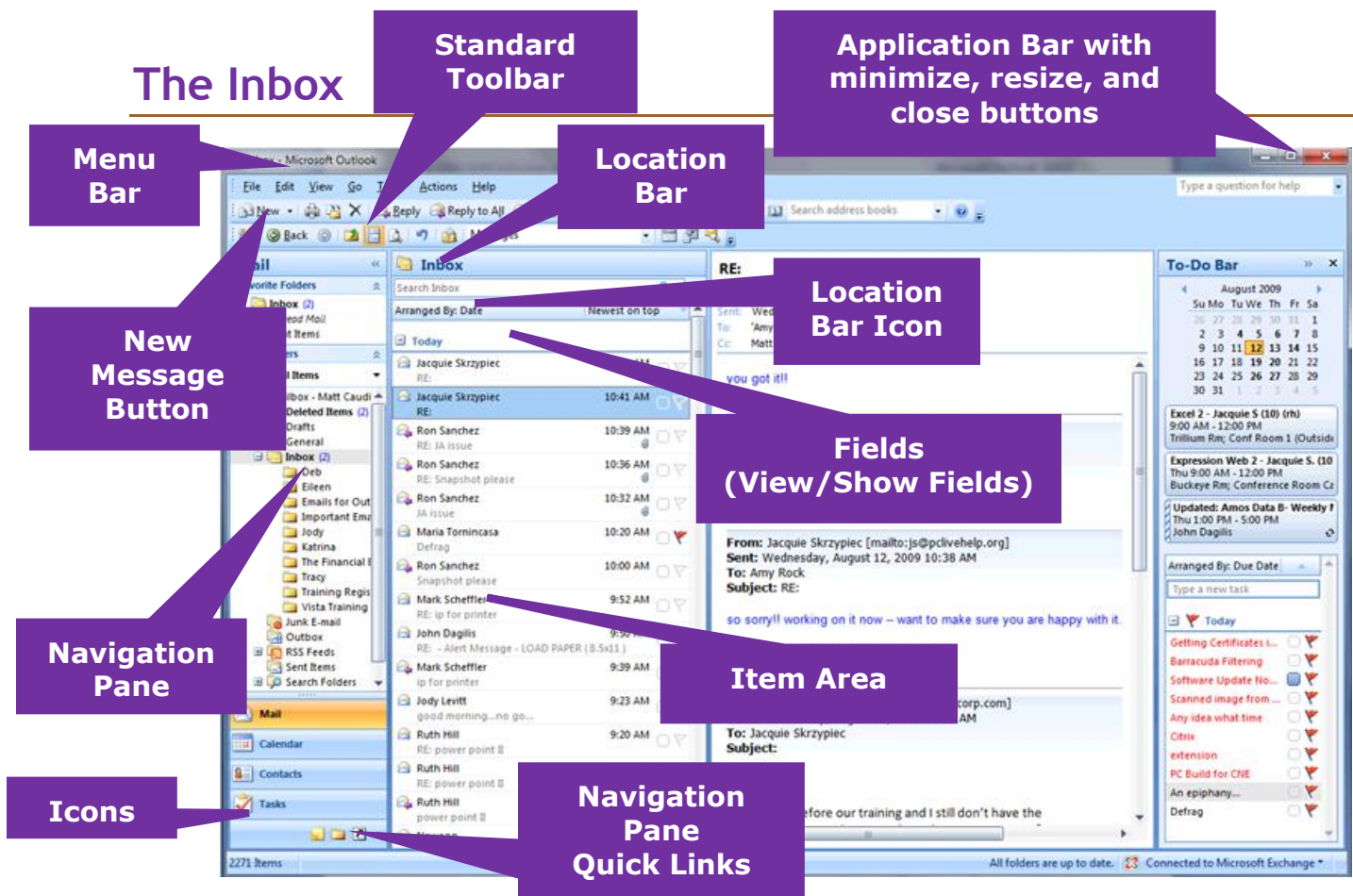
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Call us here!

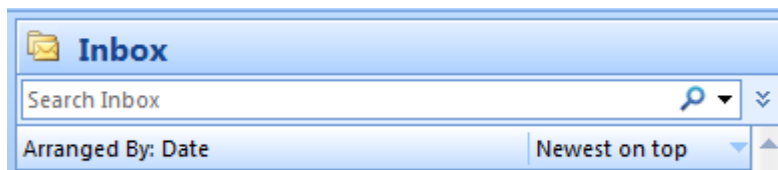
Settings

It is important that you set your settings so that Outlook works correctly. Visit www.JacqConnect.us/downloads.htm for FREE manuals that will walk you through this process.



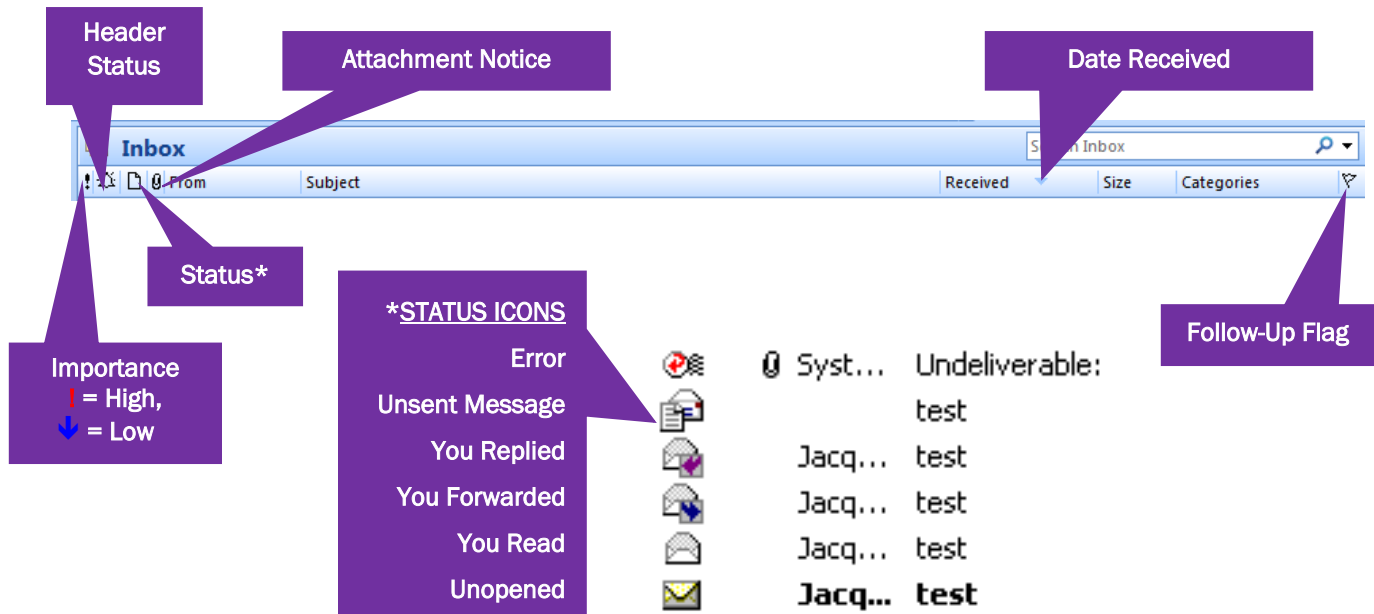
1. The **Navigation Pane** lets you switch quickly from one category to another.
 - You can make the **Navigation Pane** thinner or wider by clicking on the right-hand bar and dragging.
2. You can also use the **Navigation Pane Quick Links**.
 - For example; the **Mail** link contains your **Inbox**, **Outbox**, **Sent Items**, etc.
 - These icons are actually shortcuts to the various folders in Outlook.
3. The **Icons** at the bottom of the **Quick Links** area provide more items, such as **Notes**, **Public Folders (Folder List)**, and shortcuts to other parts of your computer.

4. The **Instant Search** option is available as a blank field right below the **Location Bar**.
 - While you are in a folder, type in the name of an item you are searching for and it will display any email and/or document within that folder that contains your requested information!



5. The **Status Bar** tells you how many messages you have (and how many you haven't read).
6. The **Location Bar** tells you what folder you are currently viewing.
 - The **Location Icon** tells you what type of folder it is (**Mail, Calendar, Note, Task, etc.**)
7. The **Navigation Pane** helps you in organizing your messages and contacts.
 - If you cannot see it, go to **View > Navigation Pane**.
 - You can make the pane thinner or wider by clicking on the right-hand bar and dragging.
8. The small box with the plus sign next to the folder name indicates there are sub-folders inside the major folder.
 - a. To see these folders, simply click on the **plus sign** (this is called **expanding**).
 - b. To hide the sub-folders, click on the **minus sign** (this is called **collapsing**).
 - c. To create a sub-folder, right-click on the folder and select **New Folder**.
 - d. Type in a name for the folder and click **[OK]**.
 - e. To delete a sub-folder, select it and click the **[Delete]** key.
9. The center or upper right section (depending on where your Reading Pane is located) is the **Item Area**. You can customize how this area looks with your menu.
 - a. Click on the menu **View > Arrange By > Current View**.
 - b. Some of my favorites are...
 - **Messages...**just lists all the messages.
 - **Messages with AutoPreview**,,, gives you the first three lines in a different color so you can decide whether you want to open the message or not.
 - **By Sender**...summarizes all messages in your inbox by who sent them to you.
 - c. The rest of the **View > Arrange By > Current View** choices are merely sort and/or filter options.

10. The Inbox fields are very helpful:



- To sort by a field, click on the field heading. A triangle will appear to indicate A-Z or Z-A (▲▼).
- To move an item into a folder, click on the item and drag to the desired folder.
 - When the folder is highlighted, let go.

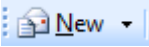
Using E-Mail

Although each e-mail application (Outlook, Yahoo, Hotmail, Gmail, etc.) looks different, they all have the same **general functions**: write messages, attach documents, send messages, reply to messages, and store messages.

We will focus on Microsoft Outlook, but the steps can be transferred to any e-mail program.

The screenshot shows the Outlook 'Compose' window with the 'To' field dropdown menu open. The menu lists various contacts and folders. Callout boxes provide instructions:

- Top-left callout:** "These are the names that are in the selected folder. Click twice on them to move them to the [To] list or click once on the name and then once on [CC] or [BCC] to put them in those lists"
- Right callout:** "This is your folder list. Click on the folder containing the desired contacts*"
- Bottom-right callout:** "Click [OK] when done"
- Bottom-left callout:** "Click on the [Properties] box if you want to see what information is available about the contact"
- Bottom callout:** "*If you do not find the correct Contacts folder here, close this box and then right-click on the folder name. Select Properties and then click on the Outlook Address Book tab. Check Show this folder as an e-mail Address Book."


- To create a new message, go to **File > New > Mail Message** or click the **[New] message button**. 
- In the **[To]** field, type in the full e-mail address of the person to whom you are writing.
 - Do not use "www" in your address: **name@domain.org** *NOT* www.name.org
 - Example: Candy@jacqconnect.us
 - If it is someone within your organization, you will just need to type their name, not the full email address.
- OR** click the **[To]** button to access your address book.
 - Select the names you want and double-click on them.
 - You can add as many people in the **[To]** box as you like—just separate the names with semicolons (;)

- Depending on how your address book is set-up, you might only need to type the first few letters of the person's name and then tab—the program will find the person's name containing those letters and complete it for you.
4. Do the same for the **[CC]** (carbon copy) address(es).
 5. If you want to send a **BCC - blind carbon copy** to someone (which means to send a copy of the e-mail to a person without that person's name appearing to the **[To]** or **[CC]** people), click on the **[To]** button and then add that person in the **BCC** box.
 - Again, there is no limit as to how many you can add.
 6. Type a subject in the **[Subject]** field.
 - Although this is optional, it is considered a courtesy and might increase the chances of your e-mail being read.
 7. Type your message in the text box.
 8. A note about formatting: You can make your message look really outrageous (pinks and blues, weird fonts, bold and underline, etc.) before you send it. However, the recipient's e-mail browser will decide how it will look:
 - For example, your original email may look like this to you:

Knock. Knock. Who's there?
Woody. Woody who?
Woody care if I loved him?

- However, if the person is using AOL, all he'll see is this:
 - > Knock. Knock. Who's there?
 - > Woody. Woody who?
 - > Woody care if I loved him?
- Not exactly the same effect huh?
- Also be mindful of fonts. Your recipient might receive the color and formatting, but the font will default to Courier (a rather bland font) if your email contains a font or fonts that the recipient does not have.
 - As a general rule, assume that the recipient has **Times New Roman** and **Arial** and stick with those if you are not sure.

9. If you are interrupted, you can save your message and then come back to it later.

- Just click on the **[Office Button]**, and save the file by clicking the **Save icon**  and then close the message box.
- To open the message again, click twice on the **subject line** in the folder that you designated for your email drafts to be saved.

10. Once you are finished with your message, click **[Send]**.

- Be sure not to forget this important part!
 - Unfortunately, the computer doesn't actually think, so if you don't tell it to send the message, it will not get sent.
- **ALWAYS REMEMBER** to double-check your addressees, especially if you click **Reply** or **Forward**.
 - You want to make sure your message reaches the correct person.

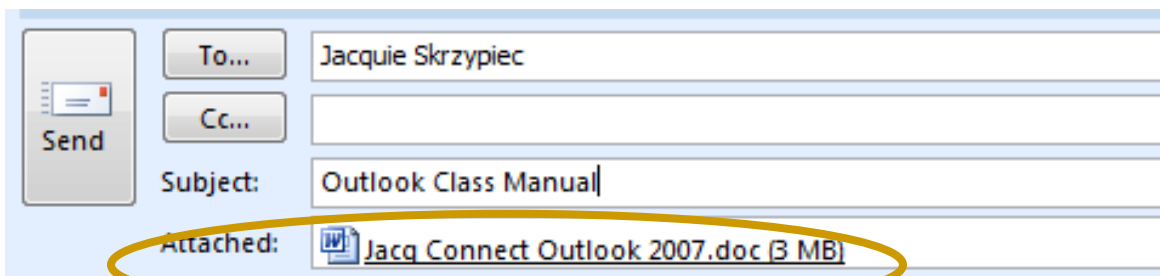
Sending Attachments

If you wish to attach a document to your email, click the **Attach File** icon or click on **Insert > Attach File**.

- Find the file you want to attach and double-click on it.
- An icon will appear in your text message area indicating your email has an attachment:



has



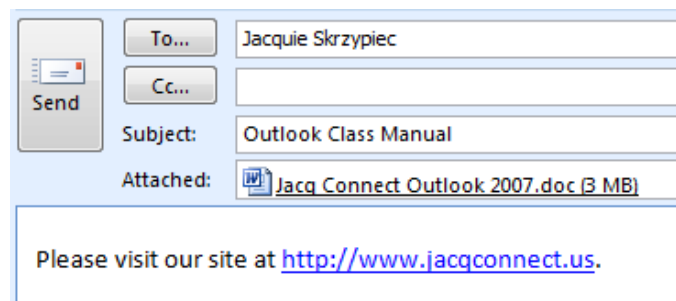
- You can do this as many times as you want to attach multiple files.

Some things to watch out for with File Attachments:

1. Some people have a limit on how large a file can be received.
 - You can sometimes get around this by splitting up the files in multiple email messages.
2. Some businesses don't allow file attachments due to antivirus software protections.
3. If you send a file, the recipient needs to have the same application on his computer.
 - For example, if you send a Microsoft Publisher 2007 message, the person has to have Microsoft Publisher 2007 on his computer to open it. If he has Microsoft Publisher 2003, he won't be able to open it.

Here are a few work-around options:

- First, call the person to confirm he has the correct software and if there are any file size limitations. If he does not have the same software, you can do one of the following...
 - a. Open the document and after clicking on the **[Office Button]**, save the file by clicking **Save As ...** and then save it in the same version of the recipient, i.e. if you typed the document in Word, then do this in Word.
 - b. Open the document and after clicking on the **[Office Button]**, save the file by clicking **Save As ...** and then save it as a **Text Only (*.txt)** document. This can be opened by any basic application. Again, if you typed the document in Word, then do this in Word.
 - c. Open the document and **Edit > Select All** then **Edit > Copy**. Then go to your e-mail and click **Edit > Paste**.
 - Basically you just copied and pasted your document into your email so no software compatibility issues! ☺
 - If you paste something in your e-mail, it will keep the same format as the original. If you do not want this, then go **Edit > Paste Special** and select **Text**, and then the text will be plain and unformatted.
4. If you want to include a link to a website, be sure to use **http://** before the address. This will tell the e-mail program to create an automatic link to this website.
 5. If you want to include an e-mail address link, put the words **mailto:** in front of the e-mail address and it will create an automatic e-mail link.



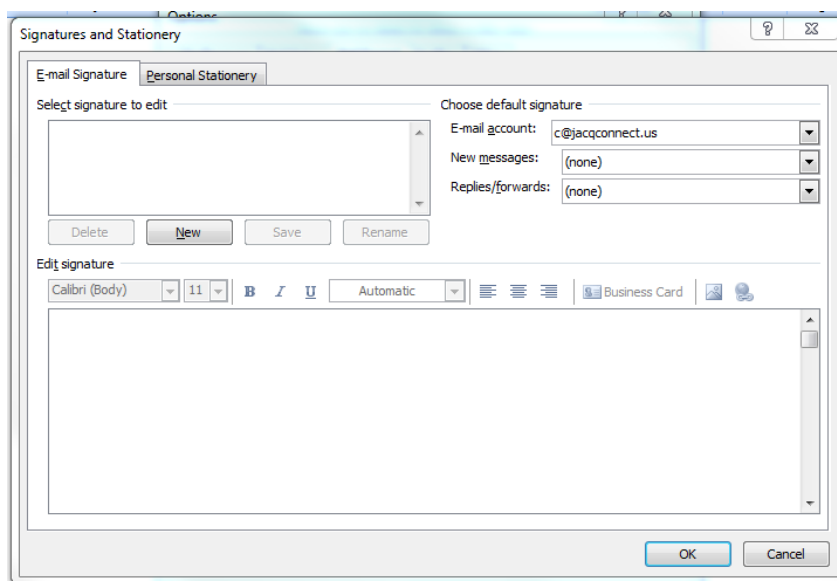
6. Create an auto-signature that has all your basic information in it so that you can add it to every appropriate message:
 - Remember my snazzy signature from before?



Let's create a signature for you...

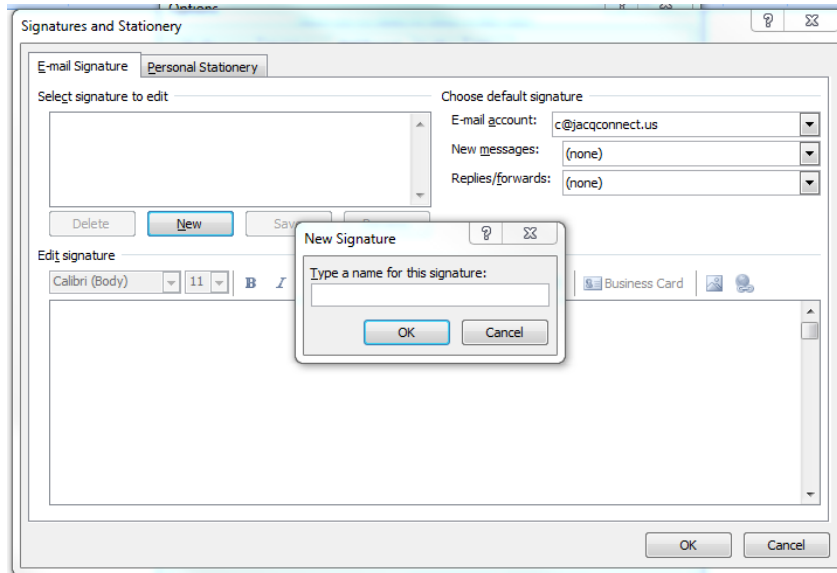
Creating an Email Signature

1. First close any open email messages.
2. Click on the menu **Tools > Options... > |Mail Format| > [Signatures..]**. You will then see the **Signatures and Stationery** dialog box.

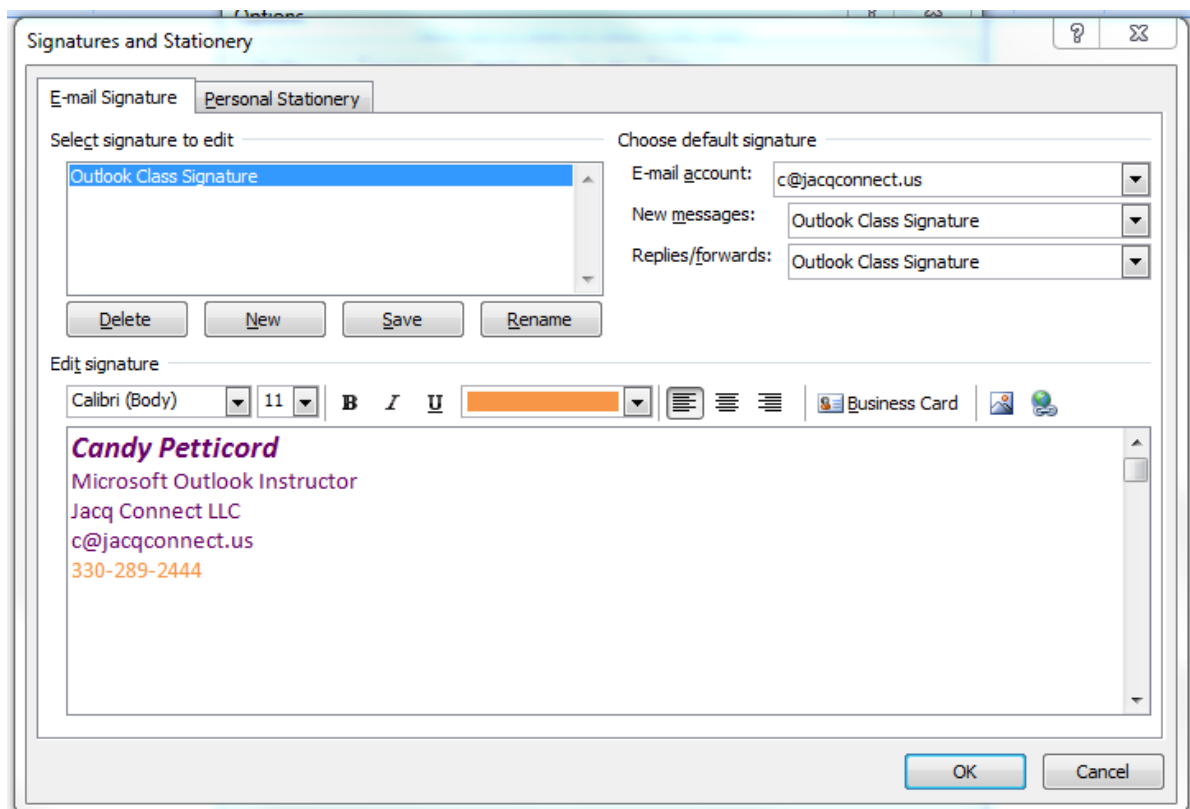


3. Click the **[New]** button and the New Signature dialog box will appear.
4. Enter a name for your signature and click **[OK]**.



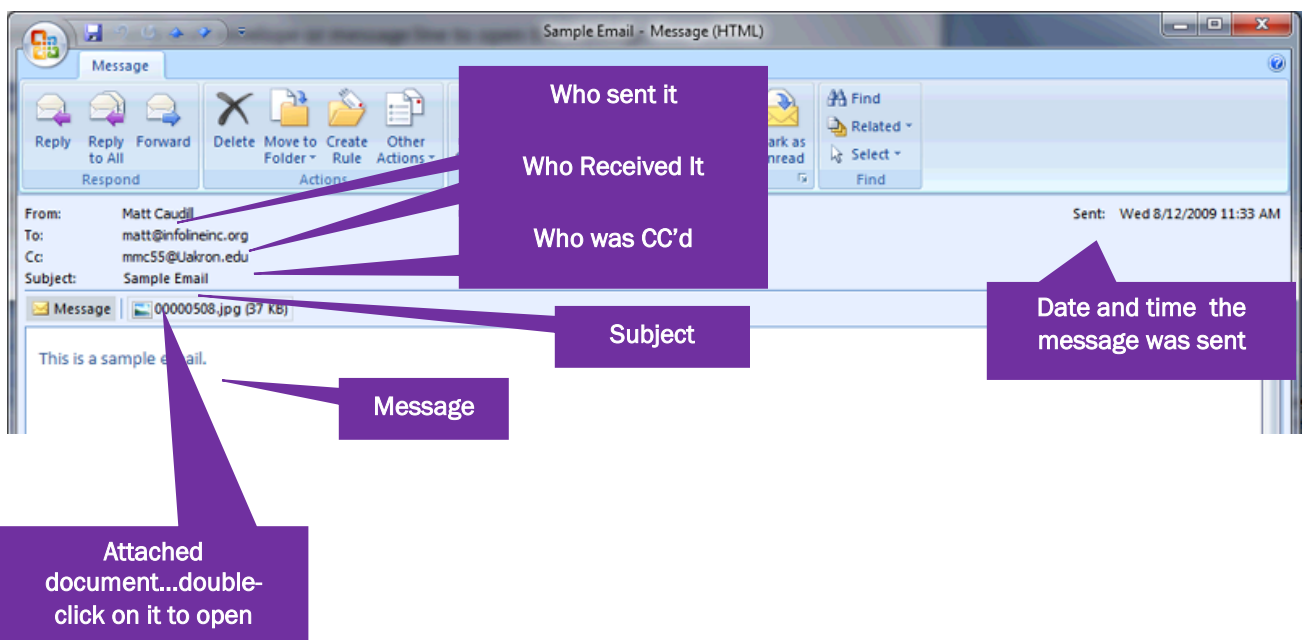
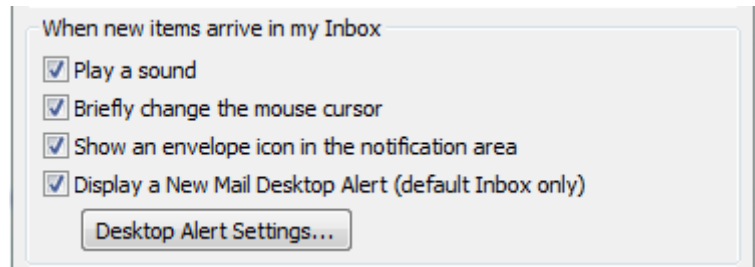


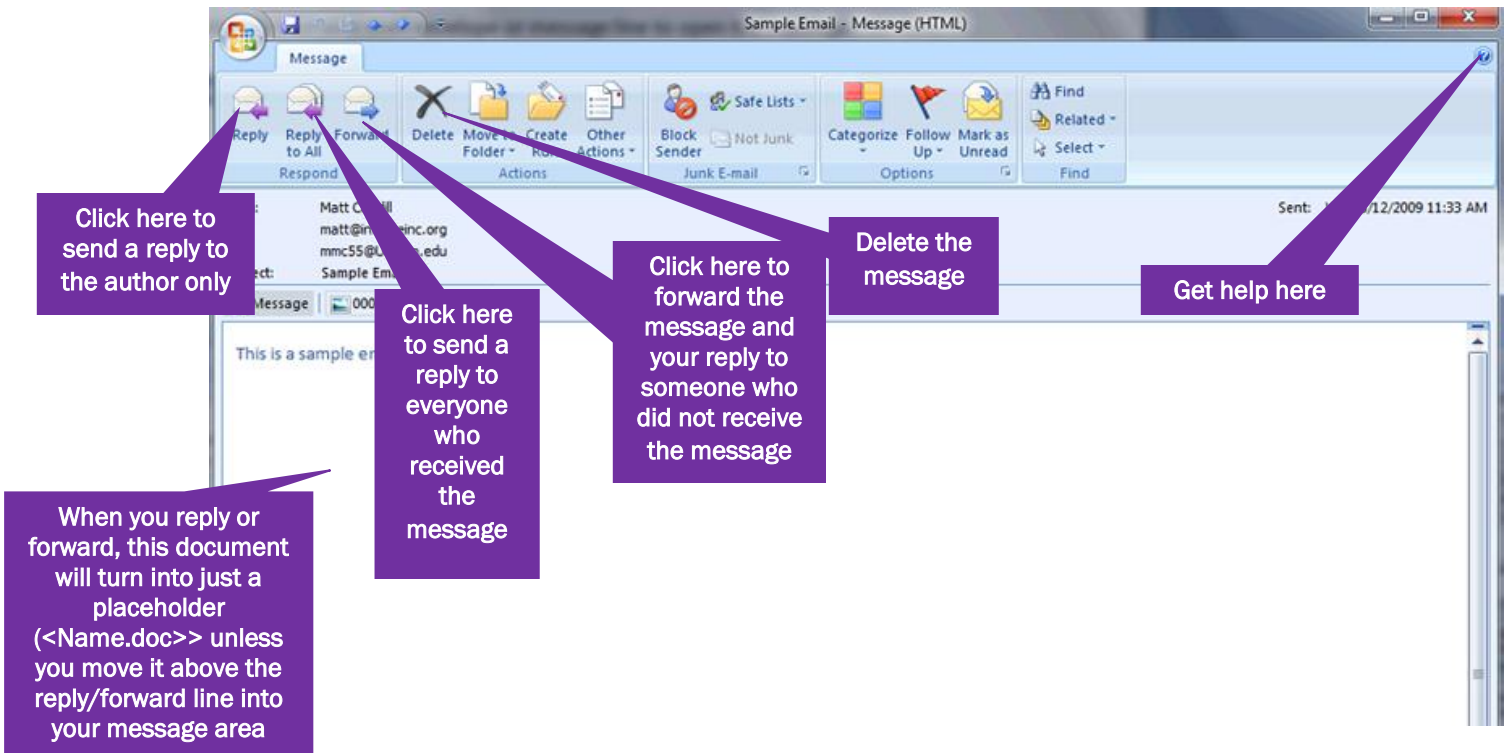
5. Type in your contact information (name, address, phone, e-mail, etc.).
 - Feel free to format it any way you'd like, but beware of "unique" fonts:
 - It might seem cool to have a cursive signature, but the recipient will probably not receive your font style.
 - However, there's nothing wrong with adding a little color! ☺
6. After you have created your signature, be sure to set it as the default signature for **New messages** and **Replies/forwards**.



Reading and Replying to E-Mails

- Reminder:** To be notified when e-mail arrives:
 - Go to **Tools > Options** and select the **Preferences** tab.
 - Click **[E-mail Options] > [Advanced E-mail Options]**.
 - Check the boxes according to your preferences and then click **[OK]**.
- Reminder:** To see the first three lines of an e-mail message before you open it (and to be able decide whether to open it at all):
 - Go to **View > Current View**
 - Select **Messages with AutoPreview**.
- Reminder:** To sort according to **From** or **Subject** or **Date Received** (usually the most helpful):
 - Click on the blue tab with that field.
 - You will see a triangle pointing up or down to tell you how the list is sorted.
- Double-click on an e-mail envelope or message line to open the message.




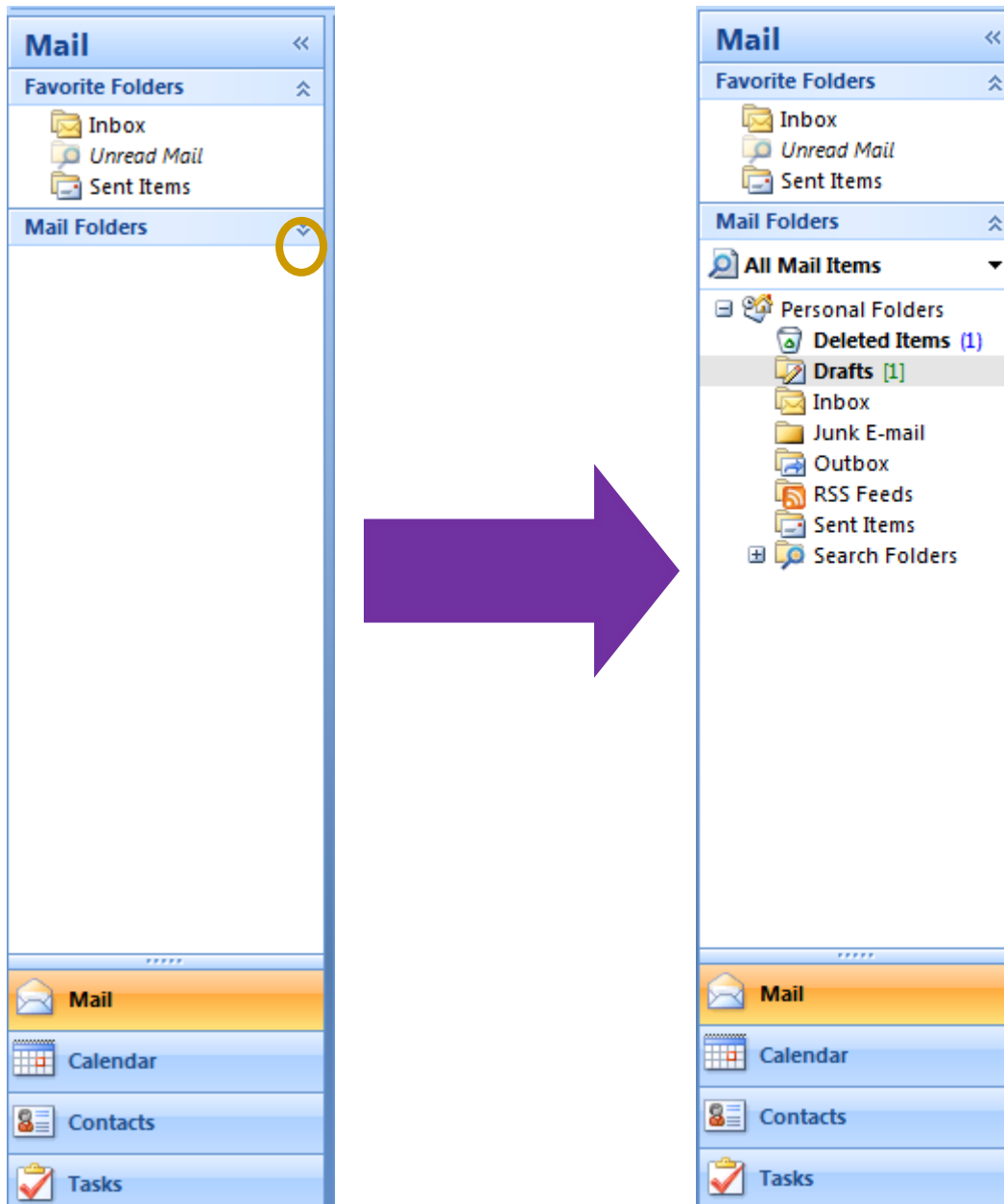


5. It is important to keep your e-mail messages organized. Here are some reminders...

- Delete unimportant or no-longer-needed messages immediately.
- Create folders in your Inbox to organize your messages.
 - To create a folder: Right-click on the **Inbox** name and select **New Folder**.
 - Name the folder and click **[OK]**.
- To move an e-mail to a folder, click on its subject line, drag it to the folder, and let go when the folder is highlighted.

Review Messages You Have Sent

1. Double-click on the **Sent Items** folder in your folder list.
 - If your folder list is not visible, then click on the arrow at the end of the **Menu Folders** bar  to make your folders appear.

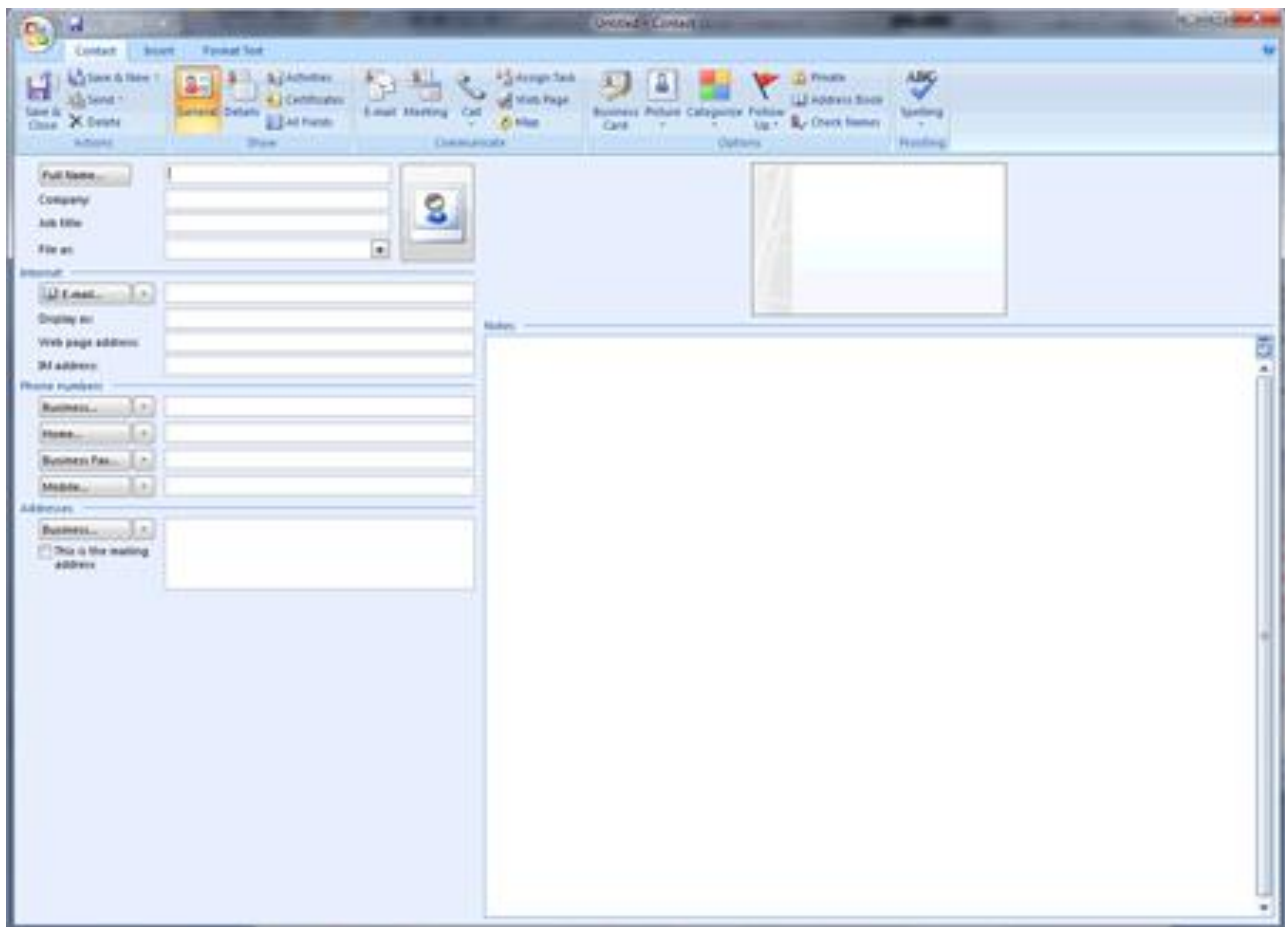


- This is how you can check to make sure you sent something, to see when you sent it, etc.
 - To sort according to **To** or **Subject** or **Date Sent**, click on the blue tab with that field. You will see a triangle pointing up or down to tell you how the list is sorted.
2. **To delete a message:** just click on it once to make sure it is selected and then press [Delete].

- Delete old messages once a month (perhaps keep the previous 2 months messages and delete the others).
3. **To view deleted emails:** double-click on the **Deleted Items** folder in your folder list.
 4. **To Undelete a message:** while in the Deleted Items folder, click on the message to select it, then click and drag it to the **Inbox** or to another folder.
 5. **To permanently delete old messages:** once a month (perhaps keep the previous 2 months messages and delete the others).
 - a. Click on the first item you want to delete, scroll down, hold down the **[Shift]** key, and click on the last item.
 - b. Hit the **[Delete]** key and then click **[Yes]**.

Keeping Track of Contacts


1. Microsoft Outlook's **Contacts** feature is a powerful tool, much more useful than the simplified **Address Book**. You can put your entire rolodex into it; organize the contacts according to categories (friends, vendors, competitors, etc.); and use it for your e-mail, faxes, mailing lists, etc.
2. Click on the **Contacts** Icon on the Navigation Pane Links.



3. To add a new contact click on the rolodex icon right below the **File** menu or click on **File > New > Contact**.



- Click in the **[Full Name...]** box and type the contact's name.
- Tab to the next field and fill in that information.
- Keep supplying information until you are finished.
 - A note about names: To keep your Contacts organized, don't leave names blank and don't duplicate—e.g., don't type **Director**, type **CSP Regional Director ...** be as specific as possible.
- **One special note:** If you fill in the business fax and the e-mail, you will have both options available to you.
 - If you want to always e-mail or always fax, just fill in the one you want to use and put the other in the notes box.

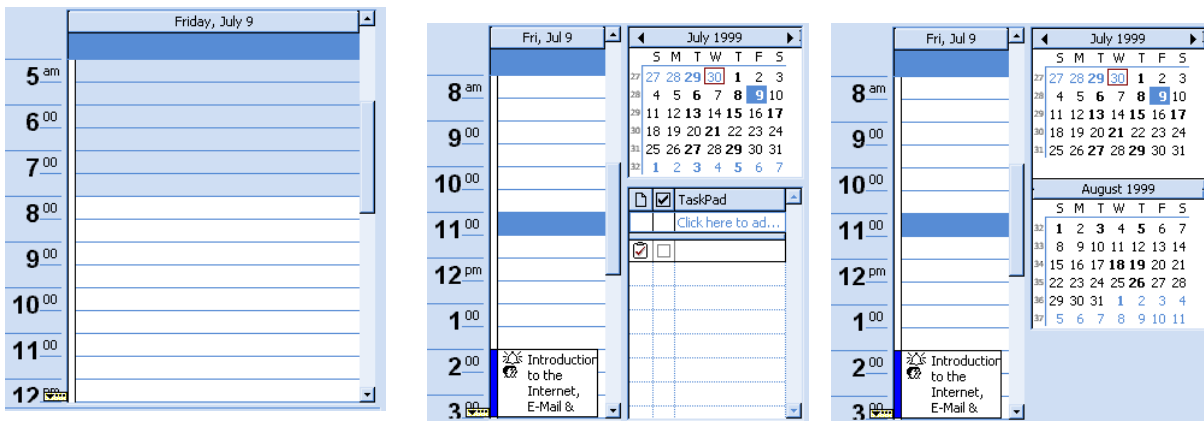
- Explore the other tabs to see what kind of information you can store about your contact.
 - Once you are finished, click [**Save and Close**].
4. Just as you can add folders in your Inbox, you can add folders in your contacts:
 - a. Right-click on the **Contacts** folder in your Folder List and select **New Folder**.
 - b. Type the description, and click [**OK**].
 5. Move contacts from one folder to the next by clicking on the name, dragging it to the folder until it the desired folder is highlighted, and letting go.
 6. To put a contact in more than one folder:
 - a. Click on the name and hold the [**Ctrl**] key down
 - b. Drag the contact name until the folder is highlighted, and let go.
 7. To send an e-mail to a contact:
 - a. Click on the  button on the toolbar within the contact's window.
 - b. Complete the message.
 8. To send an e-mail to a contact (or a group of contacts):
 - a. You can also click on the **Inbox** icon on the Navigation Pane to switch to your Inbox window.
 - b. Then click on the **New Mail Message** button on the toolbar to create a new message.
 - c. Click the [**To**] button and then click the drop-down list next to **Show names from the:**select **Contacts** from the list.
 - d. Contacts that have email addresses will now appear in the selection box below and you can add them to the **To:**, **CC:**, and **BCC:** fields.

Cool Tool: If you get an e-mail from someone that you would like to save in your contacts folder, simply drag that e-mail over the Contacts icon on your views bar. A Contact Card will open up with that person's name and e-mail already completed.

The Outlook Calendar

Say good-bye to your bulky pocket-planner. You're gonna love this calendar!

1. Click on the **Calendar** icon in the **Navigation Pane**.
2. Personalize your calendar according to your schedule.
3. Be sure to make sure the **Appointment Defaults** is on the desired reminder time. Click **[OK]**.
4. Go to **View > Current View** and explore those options.
5. Fun with frames:



6. Let's create an appointment:
 - a. Go to **View > Month**.
 - b. To add an appointment or a reminder, click on the date of the appointment on the calendar.
 - c. Double-click on the box representing the time the meeting will start.
 - d. Complete the information for the appointment including the start and end time if the appointment does not last for the entire day.
 - e. Double-check the date(s) to make sure they are accurate.
 - f. To invite others to the appointment: click the **[Scheduling]** button.
 - g. Fill in other attendees names and, if they use the calendar system, the chart should show if they are available.
 - h. Click **[Send]** to send the e-mail invitation to others.
 - This message will arrive in their inbox and give them options to accept or decline the appointment based on their availability.
7. To create a **Recurring** appointment:
 - a. Click on **New**, to start a new appointment.
 - b. Click on the **[Recurrence]** button on the toolbar.
 - You can schedule an appointment to recur every day, week, month, etc.

Opening Invitations from Your Inbox

1. If you get an appointment from someone else, you will receive a note at the top of your message when you open it if it conflicts with another appointment on your calendar:
 - **[Accept]** will automatically add the appointment to your calendar and send an acceptance note to the meeting organizer.
 - **[Tentative]** will automatically add the appointment your calendar and send a tentative acceptance note to the meeting organizer.
 - **[Decline]** will automatically send the decline to the meeting planner.
2. You will have an option to add a comment to your response or just send your response without a comment.

Cool Tool: If you get an e-mail from someone who sets up a meeting, simply drag that e-mail over the Calendar icon on your views bar. An Appointment Card will open up with that e-mail in the notes section so you can set the date and time of the appointment.

The Out of Office Assistant

When you will be out of the office and you want to respond to messages while you are gone, you can set up an automatic reply using the **Out of Office Assistant** tool (if you can't see it, make sure you are in your email). You can also have your messages automatically forwarded to someone else while you are gone.


- a. Go to your Inbox and click on the menu **Tools > Out of Office Assistant**.
- b. Click on **"I am currently out of the office"** to send an automatic message to anyone who sends you an e-mail during that time.
- c. Be sure to type in the message which includes details about how long you will be out, when you will return, and who should be contacted in emergencies.
- d. Click **[Add Rule]** to automatically forward certain messages to others while you are out.
- e. If you do not have the Out of Office Assistant available to you, there is an alternative that you can use. You can read more about it here: <http://office.microsoft.com/en-us/outlook-help/automatically-reply-to-messages-HA010248748.aspx?CTT=5&origin=HP001232830>.

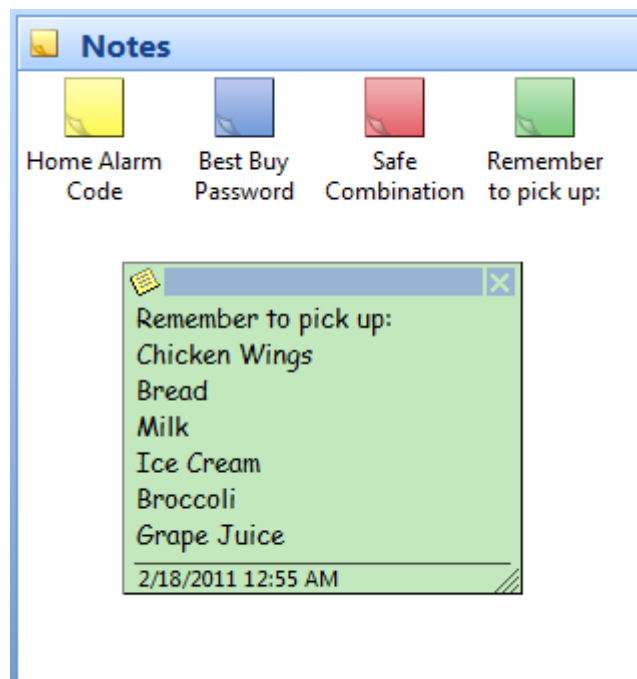
The Rules Wizard

Tired of receiving forwarded jokes or inappropriate material from certain people? Want to automatically file messages in your inbox folder? Then use this tool.

1. Click on the menu **Tools > Rules & Alerts**
2. Create a new rule by clicking the **[New Rule...]** button.
3. I like checking messages when they arrive (or rather, the **Rules Wizard** doing it for me!)
4. Click **[Next]**.
5. Identify the condition:
 - Conditions with underlined words (such as specified words) need to be defined in the rule description box.
 - Just click on the underlines and answer the questions. Click **[Next]**.
6. Tell it what to do with the message. Click **[Next]**.
7. List any exceptions. Click **[Next]**.
8. Give the new Rule a name. Click **[Finish]**.

Using Electronic Notes

1. These are the electronic version of Post-It® notes.
2. Use these to store important information that you want to have readily available: passwords, how-to's, etc.
 - To create a note, click on the **Notes icon** in the Navigation Pane.
 - Click on the **[New]** button on the toolbar or click on **File > New Note**. 
 - Type in the information and click on the "X" box to close it.
 - To open it again, click twice.
3. You can color code your notes by right-clicking on the icon and selecting a color.
4. You can also drag a note to your desktop to have it visible even when Outlook is minimized or closed.



Organizing Your Tasks

It can be really helpful to keep a list of everything you need to get done.

1. Click on the **Tasks** icon on your Navigation Pane.

The screenshot shows the Outlook Tasks window. At the top, there are two calendar views. Below them is a task list table. Callouts point to various elements:

- Task Icon:** Points to the icon of a task in the list.
- Use your double-arrow to make the task pane shorter or longer:** Points to the double-headed arrow on the right side of the task pane header.
- Sort by due date by clicking here:** Points to the 'Due Date' dropdown menu in the task pane header.
- Add a task by clicking here, typing, and entering:** Points to the 'Click here to add a new Task' text.
- Completed:** Points to the checkmark icon in the task list.

S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2	1	2	3	4	5	6	
3	4	5	6	7	8	9	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28	29	30	1	2	3	
31							5	6	7	8	9	10	11

TaskPad	Due Date
Click here to add a new Task	
<input checked="" type="checkbox"/> I&R database	None
<input type="checkbox"/> controlling the screen. database	None
<input type="checkbox"/> Please find a brighter monit...	None
<input type="checkbox"/> Powerpoint quickie	None
<input type="checkbox"/> Show Ryan how to do this v...	Fri 4/13/2007
<input type="checkbox"/> Stark Community Foundatio...	None
<input type="checkbox"/> Why are VAP connections t...	Fri 3/30/2007
<input type="checkbox"/> Work with Rob to get the u...	Wed 3/14/...

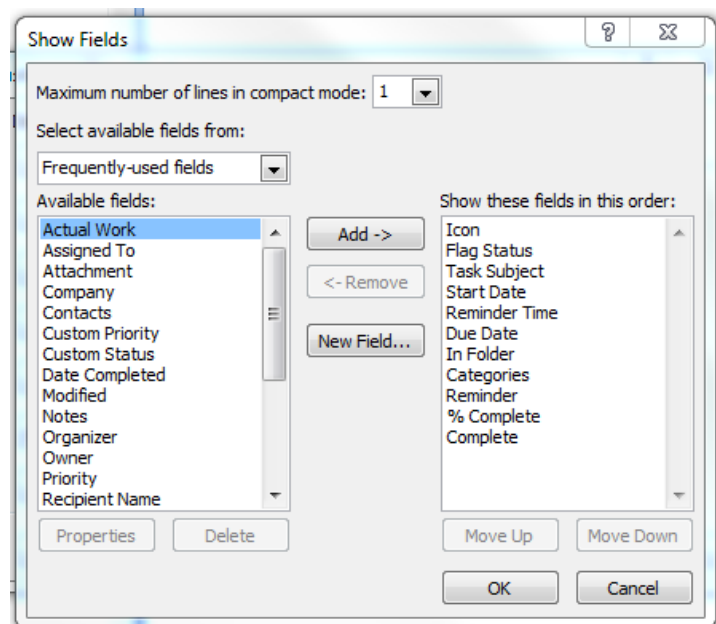
2. If there is additional field information you would like to see on your task list window:

- a. Right-click on the **Arranged By:** bar
- b. Click **Custom...** and then click the **[Fields...]** button and select the field(s) you would like to add.

- Priorities may be important to you, click on **Priority**.
- To see the field in the window drag it to the field header and let go.

3. Double-click on a task to:

- Add notes.
- Set a reminder.
- Update a status report.



4. Right-click on a task to:
 - Mark it as complete.
 - Delete it.
 - Assign it to someone else.
 - Send a status report.

Cool Tool: If you get an e-mail or an appointment with a task you should do, drag that e-mail or appointment over the Task icon on your views bar. A Task will open up with that e-mail or appointment in the notes section so you can add the details.

Back at the Office

1. Go to **Tools > Options** and set your options.
2. Be sure to create some signatures. Be creative!!
 - Use **<None>** as the default.
3. Customize your Navigation Pane and turn on your folders list. Select your preferred view.
4. Add some contacts. Organize them.
5. Send someone an e-mail. Attach a document.
6. Organize your e-mail by creating folders.
7. Add some appointments to your calendar.
8. Invite someone to a meeting.
9. Check out the Out of Office Assistant.
10. Create some electronic notes.
11. Create some tasks.
12. Use what you've learned or you'll lose it!

