Microsoft Outlook 2003

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TABLE OF CONTENTS

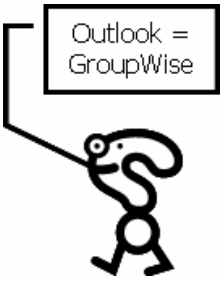
1	WHAT IS MICROSOFT OUTLOOK 2003	1
2	LAUNCH MICROSOFT OUTLOOK 2003	1
3	THE PROGRAM WINDOW	1
3.1	THE READING PANE	3
3.2	OUTLOOK TODAY (SUMMARY OF THE DAY)	3
3.2.1	ACTIVATING OUTLOOK TODAY	4
3.2.2	CUSTOMIZING OUTLOOK TODAY	4
3.3	GETTING HELP	5
3.3.1	GETTING HELP TYPING A QUESTION	5
3.3.2	GETTING HELP WITH THE OFFICE ASSISTANT	6
3.3.3	GETTING HELP USING THE HELP TASK PANE	6
4	E-MAIL MESSAGES	6
4.1	THE INBOX	6
4.2	READING MESSAGES	7
4.3	CREATING MESSAGES	7
4.4	AUTOMATION FEATURES	9
4.5	REPLYING TO A MESSAGE	9
4.5.1	FORMATTING MESSAGES	10
4.5.2	CHECKING SPELLING AND GRAMMAR	10
4.6	ATTACHING FILES	11
4.6.1	SAVING ATTACHMENTS	11
4.6.2	SAVING MESSAGES	13
4.6.3	FORWARDING MESSAGES	13
4.6.4	DELETING MESSAGES	13
4.6.5	RESTORING MESSAGES	13
4.7	MESSAGE OPTIONS	14
4.7.1	IMPORTANCE AND SENSITIVITY SETTING (MESSAGE SETTINGS)	14
4.7.2	VOTING AND TRACKING OPTIONS	14
4.7.3	RESPONDING TO A MESSAGE WITH VOTING BUTTONS	15
4.7.4	DELIVERY OPTIONS	15
4.8	SEARCH FOLDERS	16
4.8.1	CREATING A SEARCH FOLDER	16
4.9	FLAGGING MESSAGES	17
4.10	READ RECEIPTS	17
4.11	PRINTING MESSAGES	18
4.12	ADDRESS BOOKS	19
4.12.1	FINDING A CONTACT IN THE ADDRESS BOOK	19
4.12.2	SENDING A MAIL FROM THE ADDRESS BOOK	19
4.12.3	ADDING A CONTACT TO AN ADDRESS BOOK	20
4.12.4	EDITING A CONTACT	20
4.12.5	ADDING CONTACTS FROM THE SAME COMPANY	20
4.13	DISTRIBUTION LISTS	20
4.13.1	CREATING A DISTRIBUTION LIST	20
4.13.2	SENDING A MESSAGE TO A DISTRIBUTION LIST	21
4.14	CREATING A PERSONAL ADDRESS BOOK	21
4.14.1	ADDING EXTERNAL CONTACTS TO PERSONAL ADDRESS BOOK	21

4.15 CATEGORIES 22
4.15.1 CATEGORISING CONTACTS 22
4.15.2 CREATING YOUR OWN CATEGORY 22
4.16 FINDING A CATEGORY 22
4.17 MAIL MERGE WIZARD 23
4.18 TASKS 25
4.18.1 CREATING TASKS 25
4.18.2 EDITING A TASK 25
4.18.3 DELETING A TASK 26
4.18.4 RECURRING TASKS 26
4.18.5 MARKING TASKS COMPLETE 26
4.18.6 INSERTING TASKS INTO MESSAGES 27
4.18.7 ASSIGNING CATEGORIES TO A TASK 27
4.18.8 ASSIGNING TASKS TO OTHERS 27
4.18.9 ACCEPTING OR DECLINING ASSIGNED TASKS 27
4.18.10 SENDING A TASK STATUS REPORT 28
4.18.11 TRACKING A TASK 28
4.19 APPOINTMENTS (THE CALENDAR) 28
4.19.1 CREATING APPOINTMENTS 29
4.19.2 ADDING RECURRING APPOINTMENTS 30
4.19.3 CALENDAR VIEWS 30
4.20 SETTING UP MULTIPLE TIME ZONES 31
4.20.1 CREATING MULTIPLE TIME ZONES 31
4.20.2 CHANGING THE TIME INTERVAL 31
4.20.3 CATEGORIZING APPOINTMENTS 32
4.20.4 USE COLOURS TO DISTINGUISH APPOINTMENTS 32
4.20.5 MODIFYING APPOINTMENTS 32
4.20.6 DELETING APPOINTMENTS 32
4.20.7 RESTORING APPOINTMENTS 32
4.20.8 MULTI-DAY EVENTS 33
4.20.9 ADD ANNUAL EVENTS 33
4.21 MEETING REQUESTS 33
4.21.1 ORGANIZING A MEETINGS 33
4.22 RESPONDING TO MEETING REQUESTS 34
4.22.1 READING AND ACCEPTING A MEETING REQUEST 34
4.22.2 CANCELLING A MEETING 34
4.22.3 MOVING MESSAGES BETWEEN FOLDERS 35
4.23 ORGANIZING MESSAGES USING COLOURS 35
4.24 FILTERING JUNK E-MAIL 35
4.24.1 TO SET THE OPTIONS FOR FILTERING JUNK E-MAIL 35
4.25 SIGNATURES 36
4.25.1 EDITING A SIGNATURE 36
4.25.2 SETTING SIGNATURE FOR MESSAGES, REPLIES AND FORWARDS 37
4.26 ASSIGNING HYPERLINKS TO BUTTONS OR MENUS 37
4.27 INTEGRATING OUTLOOK WITH INTERNET EXPLORER 38
4.28 CREATING CUSTOM TOOLBARS 38
4.28.1 DELETING CUSTOM TOOLBAS 38
4.29 SEARCHING AND FILTERING MESSAGES 38

4.29.1 FIND FEATURE 39
4.29.2 ADVANCED FIND 39
4.29.3 FILTERS 40
4.29.4 CLEARING FILTERS 40
4.30 MESSAGE STATIONERY 40
4.30.1 ASSIGNING GROUPS TO MESSAGES 41
4.30.2 REMOVE GROUPS 42
4.31 RULES 42
4.31.1 CREATING RULES FOR MESSAGES 42
4.31.2 OUT OF OFFICE ASSISTANT 43
4.32 MANAGING YOUR MAILBOX 43
4.32.1 MAILBOX CLEANUP 43
4.32.2 AUTOMATIC ARCHIVING 43
4.32.3 RESTORING ARCHIVED MESSAGES 44
4.33 NOTES 44
4.33.1 CREATING NOTES 44
4.33.2 SHARING NOTES 44
4.33.3 CUSTOMIZING NOTES 45
4.34 JOURNAL FOLDER 45
4.34.1 RECORDING JOURNAL ENTRIES AUTOMATICALLLY 45
4.35 SHARING OUTLOOK FOLDERS 46
4.35.1 GRANTING PERMISSION TO VIEW YOUR INBOX 46
4.35.2 ACCESSING A SHARED INBOX 46
4.35.3 REMOVING INBOX PERMISSION 46
5 ACCESSING YOUR E-MAIL FROM ANOTHER VENUE 47

TIPS

Tip 1 - AutoComplete 9
Tip 2 - Default font 10
Tip 3 - QuickCorrect 11
Tip 4 - Attaching more than one document 11
Tip 5 - Creating your own voting buttons 15
Tip 6 - Mail merge in Word 24
Tip 7 - Deleting appointments 32
Tip 8 - Deleting items permanently 33
Tip 9 - Creating more than one signature 36
Tip 10 – Working with multiple signatures 37
Tip 11 - Customizing toolbars 38
Tip 12 - Create your own stationery 41
Tip 13 - You can also share calendars, tasks and contacts 46



I DID THIS IN GROUPWISE, HOW DO I DO IT IN OUTLOOK

Equivalent of GroupWise in Outlook 1 - QuickView 3
Equivalent of GroupWise in Outlook 2 - Frequent Contacts 8
Equivalent of GroupWise in Outlook 3 - Groups 20
Equivalent of GroupWise in Outlook 4 - Setting a rule while on holiday 43

STUDY COMPONENT

MICROSOFT OUTLOOK 2003

TIME FRAME: 1day

SPECIFIC OUTCOMES

At the end of this module, the learner should be able to:

- Launch Microsoft outlook
- Identify the program window
- Switch the reading pane on and off
- View Outlook today (summary of the day)
- Activate Outlook today
- Customize Outlook today
- Get help
- Getting help typing a question
- Getting help with the office assistant
- Getting help using the help task pane
- E-mail messages
- Use the inbox
- Read messages
- Create a message
- Automation features
- Reply to a message
- Format messages
- Check spelling and grammar
- Attach files
- Save attachments
- Save messages
- Forward messages
- Delete messages
- Restore messages
- Use the message options effectively
- Set the importance and sensitivity setting
- Use the voting and tracking options
- Respond to a message with voting buttons
- Set delivery options
- Search for folders
- Create a search folder
- Flag messages
- Create read receipts
- Print messages
- Address books

- Find a contact in the address book
- Send a mail from the address book
- Add a contact to an address book
- Edit a contact
- Add contacts from the same company
- Utilize distribution lists
- Create a distribution list
- Send a message to a distribution list
- Create a personal address book
- Add external contacts to a personal address book
- Utilize categories
- Categorize contacts
- Create a category
- Find a category
- Use the mail merge wizard
- Utilize tasks
- Create tasks
- Edit a task
- Delete a task
- Create recurring tasks
- Mark tasks as complete
- Insert tasks into messages
- Assign categories to a task
- Assign tasks to others
- Accept or decline assigned tasks
- Send a task status report
- Track a task
- Utilize appointments (the calendar)
- Create appointments
- Add recurring appointments
- Show different calendar views
- Set up multiple time zones
- Create multiple time zones
- Change the time interval
- Categorize appointments
- Use colours to distinguish appointments
- Modify appointments
- Delete appointments
- Restore appointments
- Create multi-day events
- Add annual events
- Create meeting requests
- Organize meetings
- Respond to meeting requests
- Read and accept a meeting request
- Cancel a meeting

- Move messages between folders
- Organize messages using colours
- Filter junk e-mail
- Set the options for filtering junk e-mail
- Create signatures
- Edit a signature
- Set a signature for messages, replies and forwards
- Assign hyperlinks to buttons or menus
- Integrate Outlook with Internet Explorer
- Create custom toolbars
- Delete custom toolbas
- Search and filter messages
- Use the find feature
- Use the advanced find
- Use filters
- Clear filters
- Create and use message stationery
- Assign groups to messages
- Remove groups
- Utilize rules
- Creating rules for messages
- Set the Out of office assistant
- Manage a mailbox
- Use the Mailbox cleanup
- Use the automatic archiving
- Restore archived messages
- Utilize notes
- Create notes
- Share notes
- Customize notes
- Understand the Journal folder
- Record journal entries automatically
- Share outlook folders
- Grant permission to view your inbox
- Access a shared inbox
- Remove inbox permission
- Access your e-mail from another venue

MICROSOFT OUTLOOK 2003

1 WHAT IS MICROSOFT OUTLOOK 2003

Outlook is a Microsoft mail application. You use it to send and receive e-mail. You also use it as an organizer (diary) to schedule meetings, appointments and tasks.

2 LAUNCH MICROSOFT OUTLOOK 2003

To launch Outlook 2003, double-click on the Outlook icon on the desktop.
OR
Double-click on the icon on the TASKBAR

3 THE PROGRAM WINDOW

WHAT IT IS?	WHAT IT DOES?
Control menu icon	Displays commands used to work with the main program menu
Menu bar	Contains menus such as FILE, EDIT VIEW, GO, etc.
Title bar	Displays the name of the folder currently active
Standard toolbar	Contains buttons that you can use instead of menu options to perform common tasks.
Status bar	Shows info about the current state of what is being viewed in the window
Navigation pane	Provides centralized navigation to all parts of Outlook
Pane-switching buttons and icons	Displays panes that are used often with one click
Configure buttons icon	Shows commands used to change the way the Navigation pane looks
Folder pane	Displays the name of the active folder
Folder contents list	Displays the contents of the active folder
Reading pane	Displays the contents of the selected e-mail message

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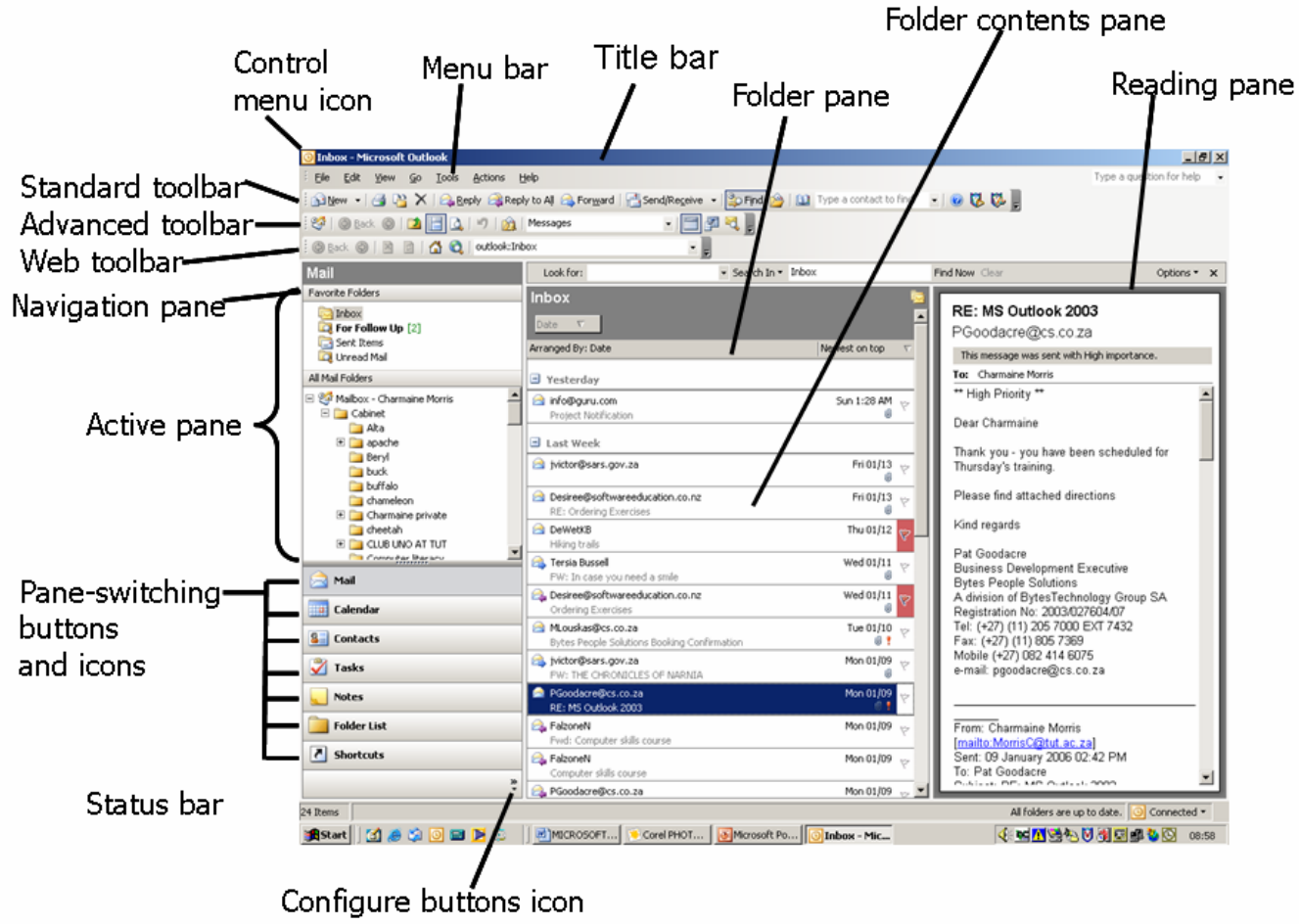
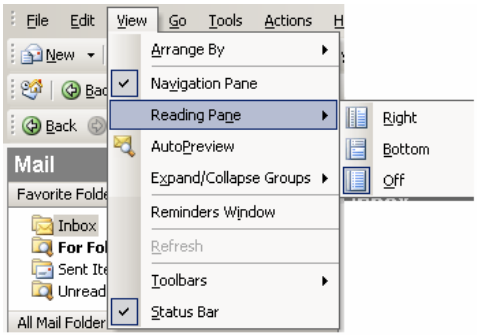

Folder contents pane
Control menu icon
Menu bar
Title bar
Folder pane
Reading pane
Standard toolbar
Advanced toolbar
Web toolbar
Navigation pane
Active pane
Pane-switching buttons and icons
Status bar
Configure buttons icon
Inbox - Microsoft Outlook
File Edit View Go Tools Actions Help
Mail
Favorite Folders
Inbox
For Follow Up [2]
Sent Items
Unread Mail
All Mail Folders
Mailbox - Charmaine Morris
Cabinet
Alta
apache
Beryl
buck
buffalo
chameleon
Charmaine private
cheetah
CLUB UNO AT TUT
Mail
Calendar
Contacts
Tasks
Notes
Folder List
Shortcuts
Inbox
Arranged By: Date
Newest on top
Yesterday
info@guru.com
Project Notification
Sun 1:28 AM
Last Week
jvictor@sars.gov.za
Fri 01/13
Desiree@softwareeducation.co.nz
RE: Ordering Exercises
Fri 01/13
DeWetKB
Hiking trails
Thu 01/12
Tersia Bussell
FW: In case you need a smile
Wed 01/11
Desiree@softwareeducation.co.nz
Ordering Exercises
Wed 01/11
MLouskas@cs.co.za
Bytes People Solutions Booking Confirmation
Tue 01/10
jvictor@sars.gov.za
FW: THE CHRONICLES OF NARNIA
Mon 01/09
PGoodacre@cs.co.za
RE: MS Outlook 2003
Mon 01/09
FalzoneN
Fwd: Computer skills course
Mon 01/09
FalzoneN
Computer skills course
Mon 01/09
PGoodacre@cs.co.za
Mon 01/09
RE: MS Outlook 2003
PGoodacre@cs.co.za
This message was sent with High importance.
To: Charmaine Morris
** High Priority **
Dear Charmaine
Thank you - you have been scheduled for Thursday's training.
Please find attached directions
Kind regards
Pat Goodacre
Business Development Executive
Bytes People Solutions
A division of BytesTechnology Group SA
Registration No: 2003/027604/07
Tel: (+27) (11) 205 7000 EXT 7432
Fax: (+27) (11) 805 7369
Mobile (+27) 082 414 6075
e-mail: pgoodacre@cs.co.za
From: Charmaine Morris
[mailto:MorrisC@tut.ac.za]
Sent: 09 January 2006 02:42 PM
To: Pat Goodacre
24 Items
All folders are up to date.
Connected
Start
08:58

Outlook = GroupWise

Equivalent of GroupWise in Outlook 1 - QuickView

3.1 THE READING PANE

The Reading Pane works when a mail-related pane or folder is active. You can choose to have the reading pane on the RIGHT or the BOTTOM of the screen or you can have it OFF.



Click VIEW
Click READING PANE
Select RIGHT, BOTTOM or OFF

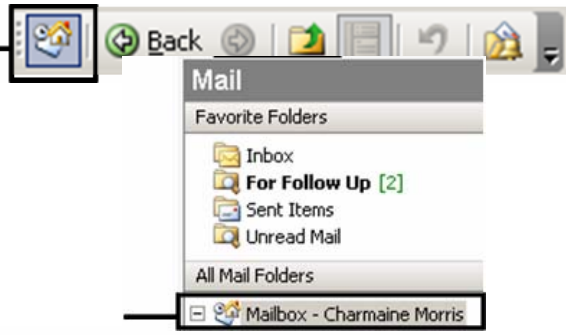
3.2 OUTLOOK TODAY (SUMMARY OF THE DAY)

This is a summary of everything that is happening for the day.

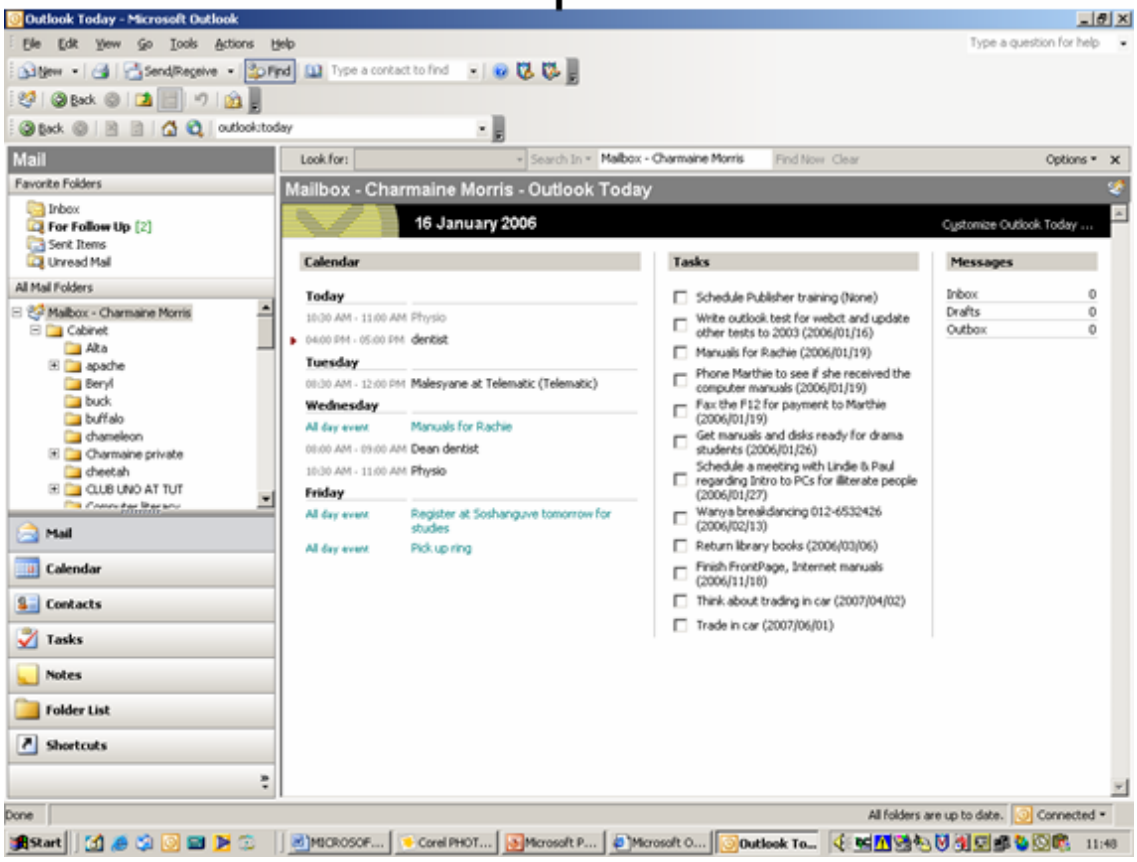
If you ADVANCED toolbar is not activated then do the following:
Click VIEW
Click TOOLBARS
Click ADVANCED
OR
Right-click in the grey toolbar area
Select the ADVANCED toolbar

3.2.1 ACTIVATING OUTLOOK TODAY

Click the OUTLOOKTODAY button
OR
Click MAILBOX under the ALL MAIL FOLDERS

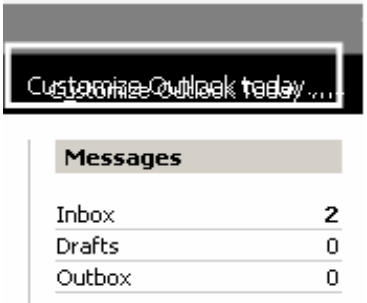


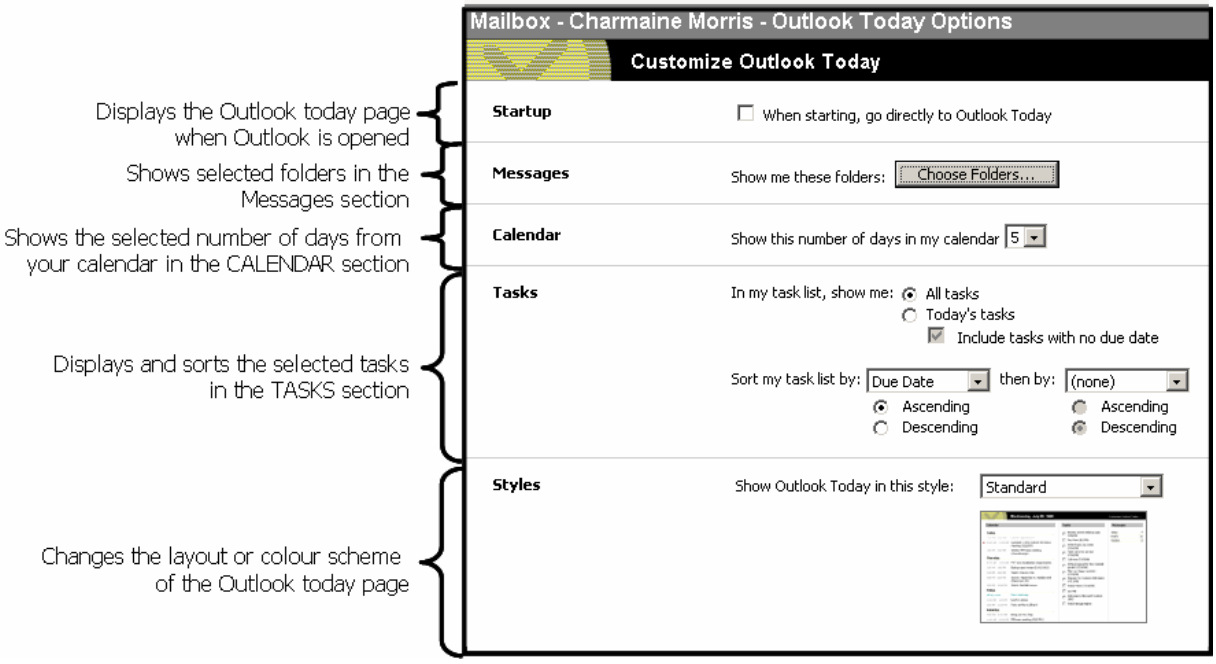
View of OUTLOOK TODAY



3.2.2 CUSTOMIZING OUTLOOK TODAY

Click CUSTOMIZE OUTLOOK TODAY



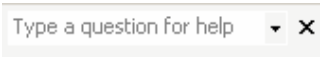


When you have customized your OUTLOOK TODAY, click SAVE CHANGES

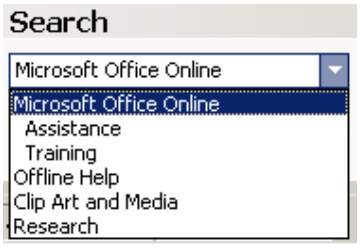
3.3 GETTING HELP

3.3.1 GETTING HELP TYPING A QUESTION

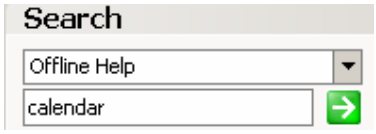
Type a question the box
Press ENTER



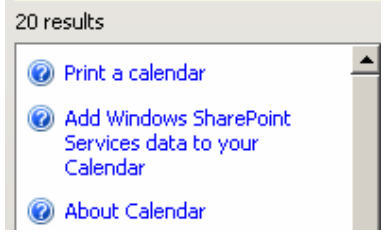
Choose ONLINE or OFFLINE HELP
(Online takes you to the Internet)



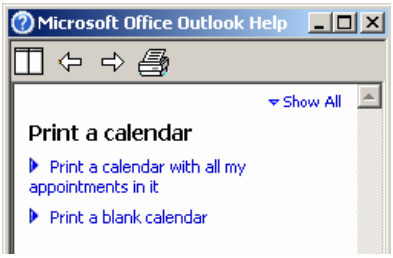
Select OFFLINE HELP
Click on the GREEN ARROW



Click on the topic you want help on

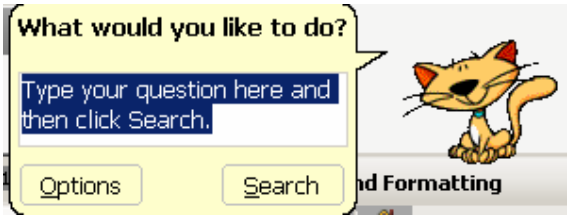


A separate window opens with an explanation of what to do



3.3.2 GETTING HELP WITH THE OFFICE ASSISTANT

To show the OFFICE ASSISTANT, click HELP
Click SHOW THE OFFICE ASSISTANT
Click on the OFFICE ASSISTANT for the "WHAT WOULD YOU LIKE TO DO" balloon to open
Type a question in the balloon
Click SEARCH



3.3.3 GETTING HELP USING THE HELP TASK PANE

Click HELP
Click MICROSOFT OFFICE HELP
In the SEARCH FOR box, type in the subject you want help on
Click on the GREEN ARROW
Choose ONLINE or OFFLINE HELP
A separate window opens with an explanation of what to do
Click on the to turn off the HELP PANE

4 E-MAIL MESSAGES

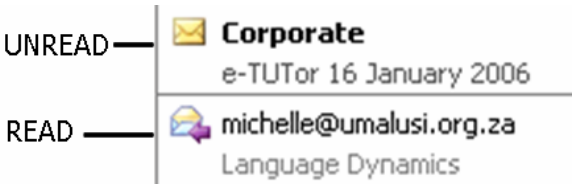
4.1 THE INBOX

The Inbox is used to read and create messages. The header of an e-mail message has the following information: Who the MESSAGE is from, the SUBJECT and the TIME received.

The header also contains an icon.

ICON	DESCRIPTION
	A new and unread message
	A message that has already been read
	A message that has been read and replied to
	A message that has been read and forwarded
	A message with a file attachment
	A flagged message

4.2 READING MESSAGES



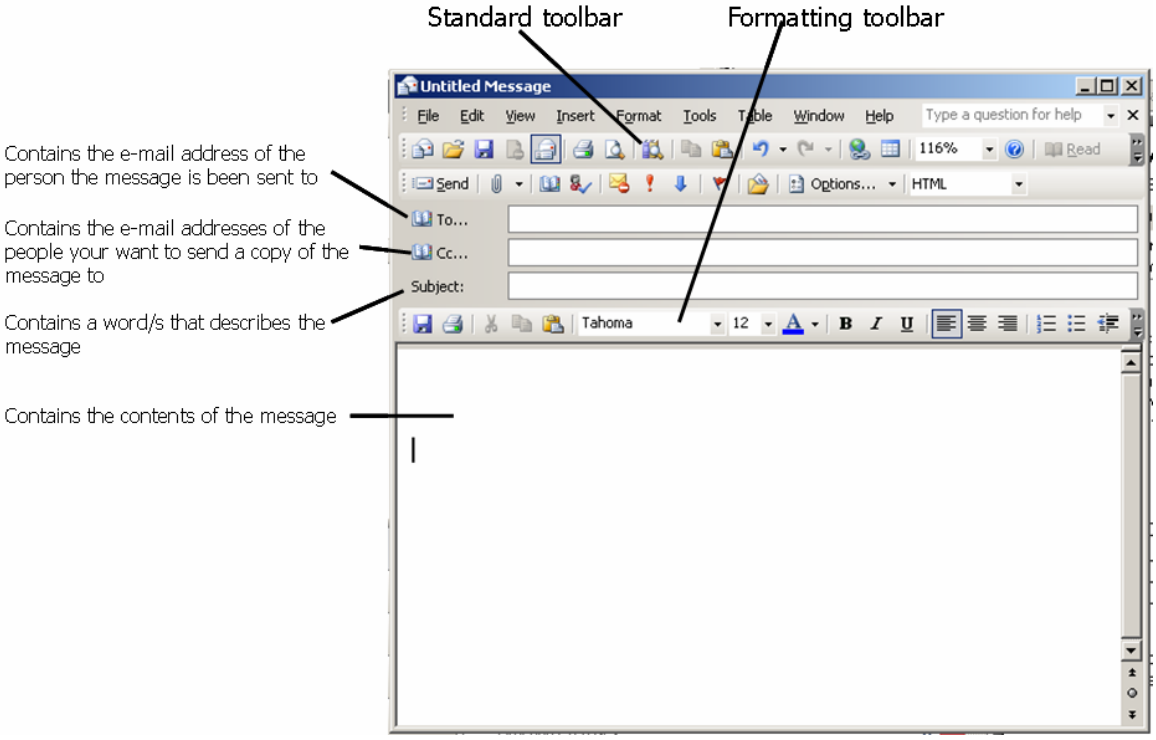
Unread messages appear in bold.
Read messages appear in regular text

Double-click the unread message
Read the message
Examine and make use of the tools on the Standard toolbar

Click FILE and CLOSE or click the

4.3 CREATING MESSAGES

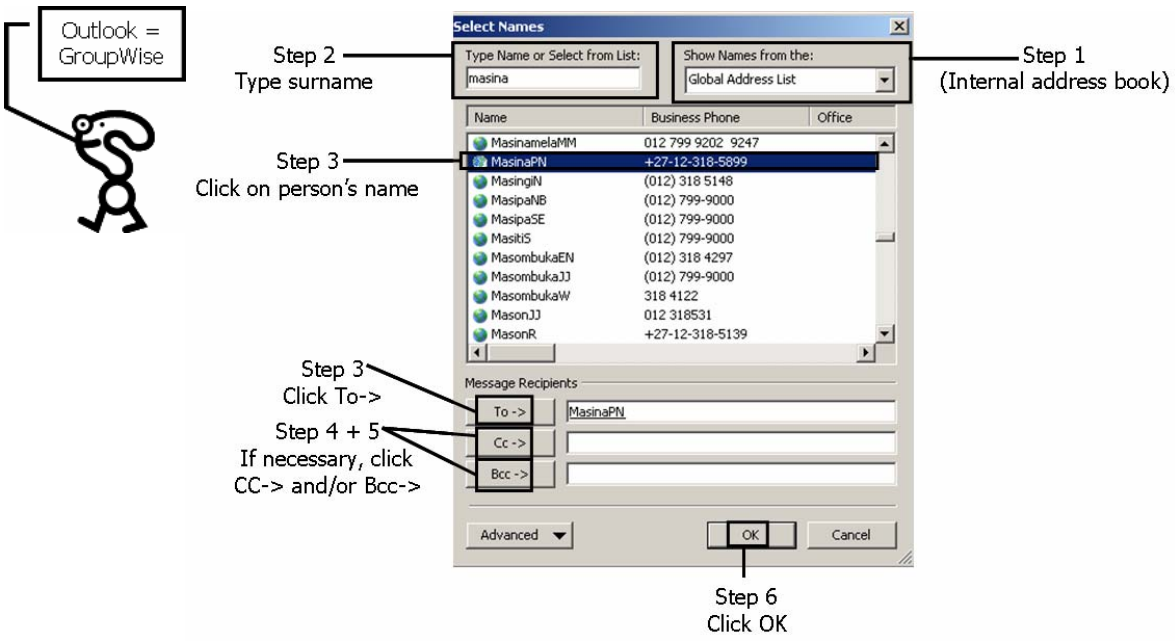
Click FILE, NEW, MAIL MESSAGE
OR
Click on the STANDARD TOOLBAR
OR
Press CTRL + N



Type in the recipient's e-mail address

If you don't know the address, click on

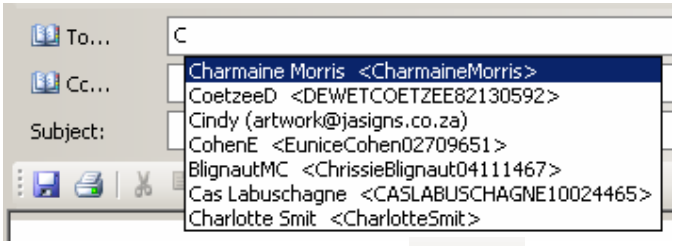
Then follow the following steps:



Equivalent of GroupWise in Outlook 2 - Frequent Contacts

4.4 AUTOMATION FEATURES

When you manually enter names in the TO or CC or BC boxes, Outlook checks the address book for the names. The address book contains the names of people with whom you frequently have contact.



Type the first letter of a person's name
A dropdown box appears with a list of names
If the recipient's name does not appear, click on CHECK NAMES button on the STANDARD TOOLBAR
OR
Press CTRL + K after typing a few characters in the To-> box.

4.5 REPLYING TO A MESSAGE

Open the message to which you want to reply
Click REPLY (replies only to the sender)
OR
REPLY ALL (replies to the sender and everyone else who received the original message)
Type the reply message
Click SEND
Close the message window

Tip 1 - AutoComplete

The AUTOCOMPLETE feature prompts you to complete the word. So instead of typing out a whole word or phrase, you type the first part of it. AutoComplete prompts you to complete it.
* Type 'Thank' and press the space bar * Type 'Yours' and press the space bar * Start typing today's date and press the space bar
To see a list of words in the AUTOCOMPLETE feature, do the following: Create a new mail Click inside the area where you want to type your message Click TOOLS Click AUTOCORRECT Select the AUTOTEXT tab

4.5.1 FORMATTING MESSAGES

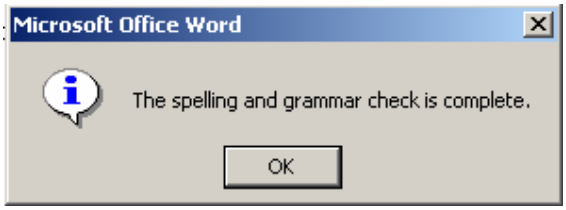
The FORMATTING toolbar has the same functionality as in Word.

Create a new message
Enter the recipient's name
Type a subject
Type a short message
Apply the formatting changes, for e.g. Font type, font size, font colour, bold, italics, underline, alignment, bullets and numbering, indentation, translation.

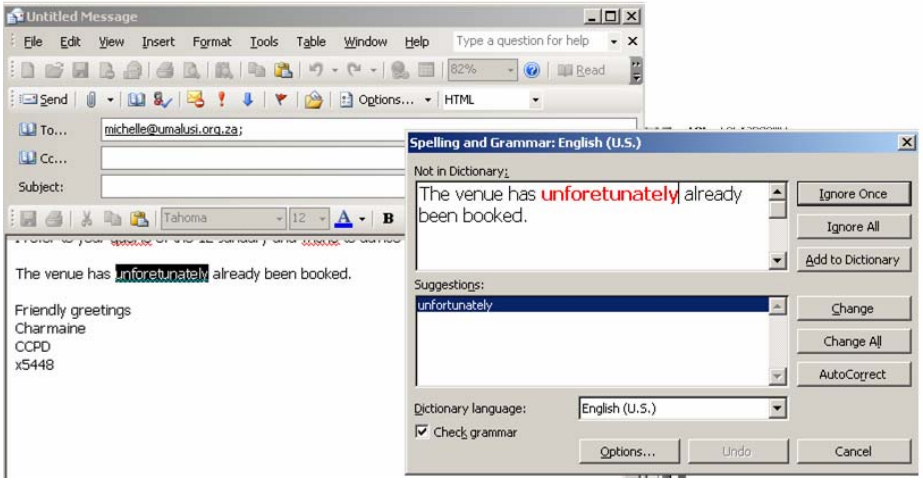
Tip 2 - Default font

Click TOOLS
Click OPTIONS
Click MAIL FORMAT
Click FONTS
Apply the necessary changes
Click OK

4.5.2 CHECKING SPELLING AND GRAMMAR



Create a new message
Enter the recipient's name
Type a subject
Type a short message
Click TOOLS
Click SPELLING AND GRAMMAR
Either IGNORE or CHANGE
A message box will appear telling you the spelling and grammar check is complete
Click OK

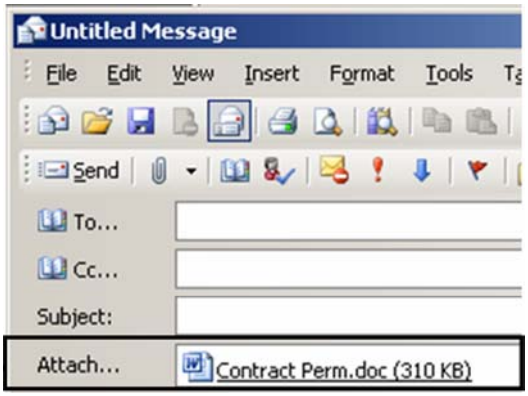


Tip 3 - QuickCorrect

Right-click on an underlined word (this indicates an incorrect spelling)
When a menu pops up, select the correct spelling

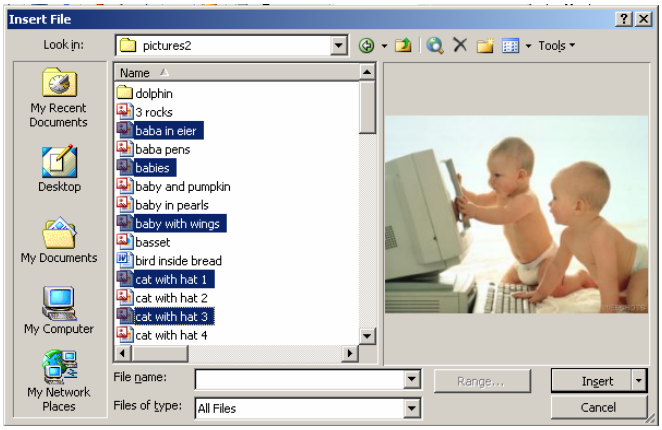
4.6 ATTACHING FILES

Create a new mail
Click on the INSERT FILE button
OR
Click INSERT
Click FILE
Select the items you want to send
The ATTACH… box shows under the subject box
Click SEND



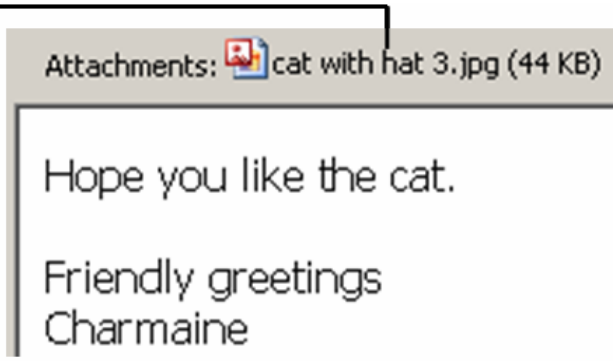
Tip 4 - Attaching more than one document

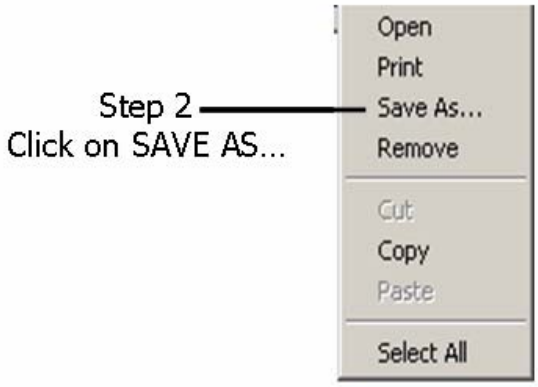
Open the folder you want to choose your attachments from
Hold your CTRL key
Click on the documents you want to send
Click INSERT

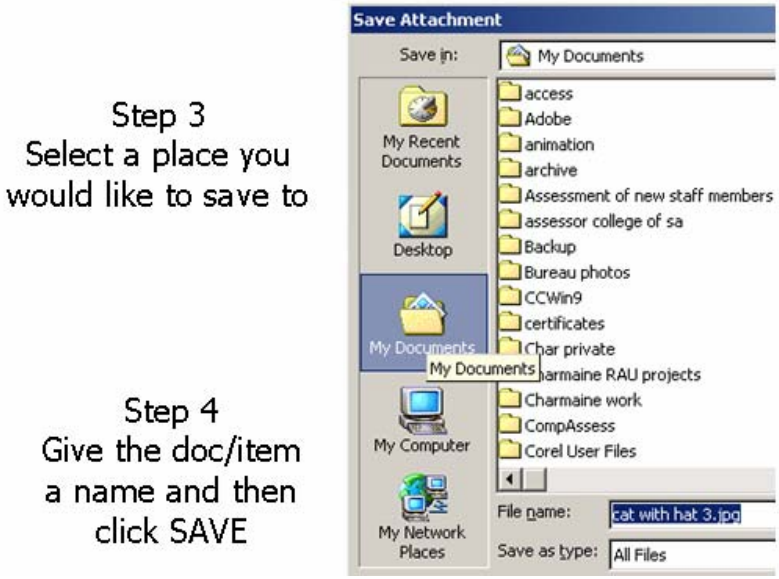


4.6.1 SAVING ATTACHMENTS

Step 1
Right-click on attachment name

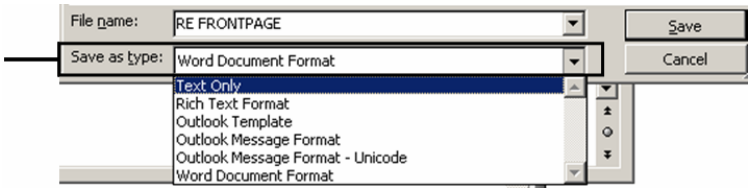






OR
Click FILE
Click SAVE
Select a place you would like to save to
Give the item a name
Click SAVE
OR
Double-click the attachment
Click SAVE
Select a place you would like to save to
Give the item a name
Click SAVE
OR
Double-click the attachment
Click OPEN
Click FILE
Click SAVE AS
Select a place you would like to save to
Give the item a name
Click SAVE

4.6.2 SAVING MESSAGES



Open a message you want to save
Click FILE
Click SAVE AS
Select a place you would like to save to
Give the item a name
From the SAVE AS type list, choose the type of file
Click SAVE

4.6.3 FORWARDING MESSAGES

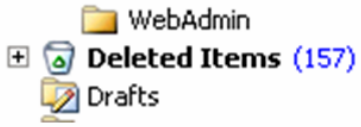
Open the message you want to forward
Click FORWARD
Type the recipient's name
Click SEND

4.6.4 DELETING MESSAGES

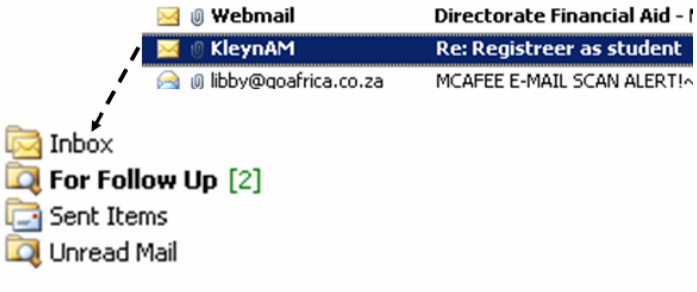
Select the message you want to delete
Click the DELETE button on the STANDARD toolbar
OR
Click EDIT
Click DELETE
OR
Press DELETE on your keyboard

4.6.5 RESTORING MESSAGES

Step 1
Activate your Deleted items folder by clicking on it



Step 2
Click and hold your left mouse button on the message you want to restore

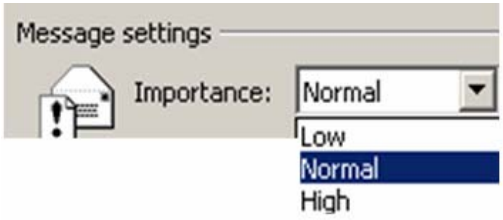


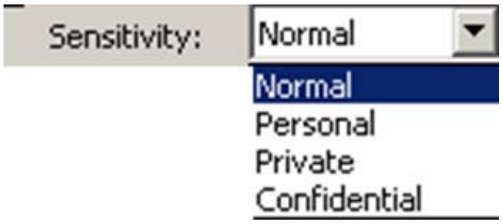
Step 3
Drag your mouse to the INBOX
When the INBOX turns blue, let go of the mouse

4.7 MESSAGE OPTIONS

4.7.1 IMPORTANCE AND SENSITIVITY SETTING (MESSAGE SETTINGS)

Create a new mail
Click OPTIONS
Click on the dropdown arrow next to IMPORTANCE or SENSITIVITY
Select the options you want
Click CLOSE
Send the message

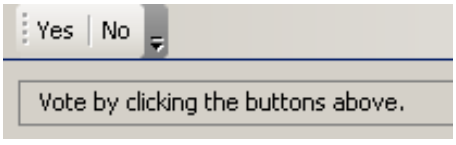




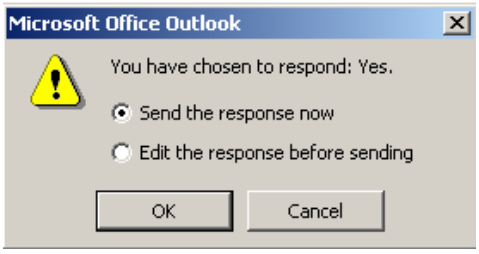
4.7.2 VOTING AND TRACKING OPTIONS

You might want your recipients to respond to a message with a short 'yes' or 'no'.
You can create such a message by using voting buttons.

Create a new mail
Click in the message area
Type your message
(E.g. Will you be there?)
Click OPTIONS
Click in the checkbox next to USE VOTING BUTTONS: to activate it
Click on the dropdown arrow
Select the option most appropriate to your question
If you want a DELIVERY AND/OR READ RECEIPT, you much tick those checkboxes as well
Click CLOSE
Click SEND

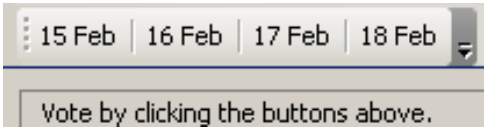


When the recipient receives the mail, there will be a YES/NO option for them to click on
Another box will appear
Select the appropriate option
Click OK



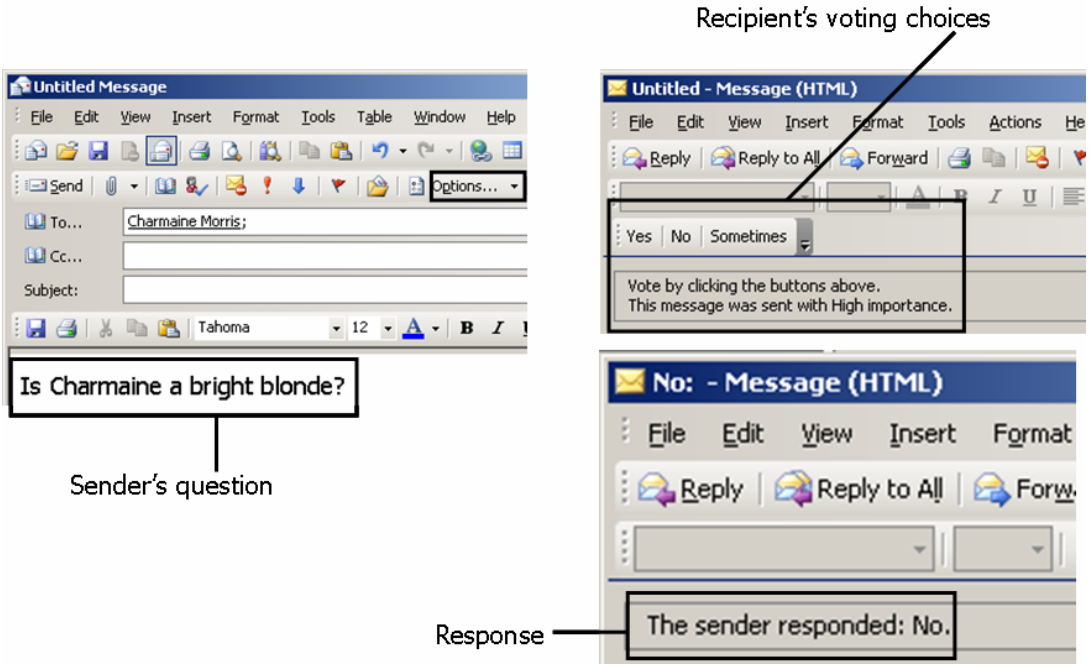
Tip 5 - Creating your own voting buttons

Create a new mail
Click in the message area
Type your message
(E.g. Will you be there?)
Click OPTIONS
Click in the checkbox next to USE VOTING BUTTONS: to activate it
In the VOTING BOX, type the different choices, but separate them with a semi-colon
Click CLOSE
Click SEND



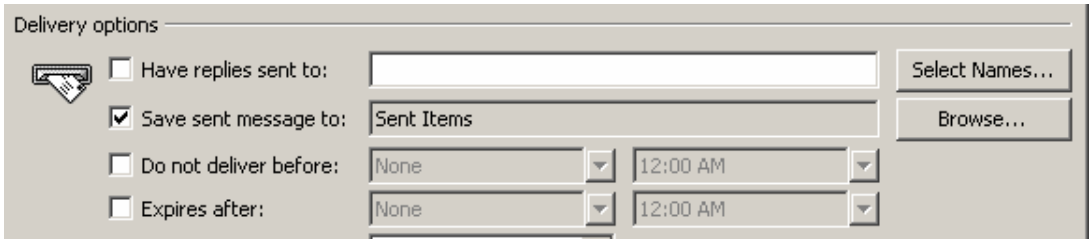
4.7.3 RESPONDING TO A MESSAGE WITH VOTING BUTTONS

Open the message
Notice the voting buttons under the Standard toolbar
Click on the most appropriate option



4.7.4 DELIVERY OPTIONS

Create a new mail
Click OPTIONS
Tick the checkboxes most appropriate to your requirements
Click CLOSE
Click SEND



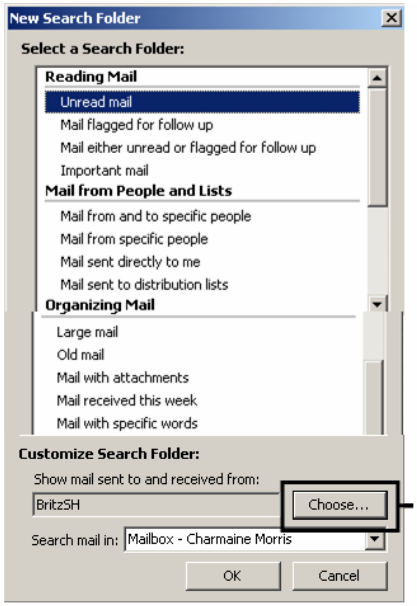
4.8 SEARCH FOLDERS

You can create a folder for saving message in a certain category or based on a specific condition.

4.8.1 CREATING A SEARCH FOLDER

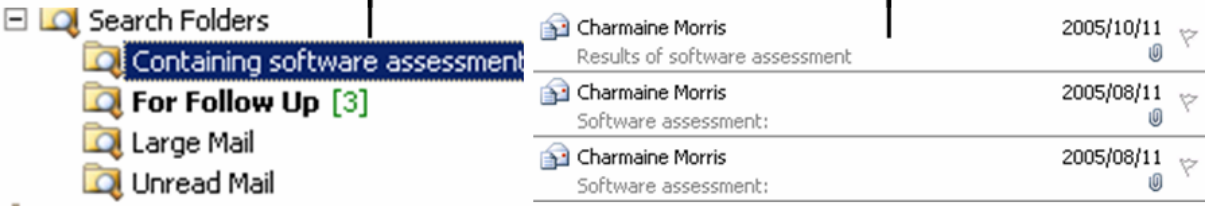
Right-click on the SEARCH FOLDER in your CABINET
Click NEW SEARCH FOLDER
Select the SEARCH FOLDER appropriate to your need
If necessary, click the CHOOSE button
Make your choice
Click OK
A new search folder will appear under SEARCH FOLDERS
Inside the new folder, it will show the items pertaining to that search

Some of the SEARCH FOLDERS make use of the CHOOSE button

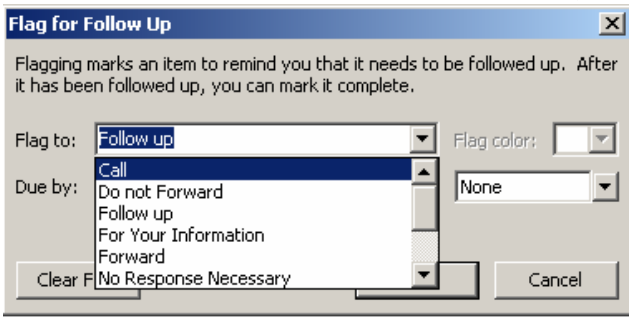


New Search folder

Results of the search



4.9 FLAGGING MESSAGES

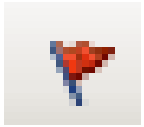


A flag means that you need to take further action on a message. When you flag a message, you can specify the action that has to be taken, the date it is due and the time.

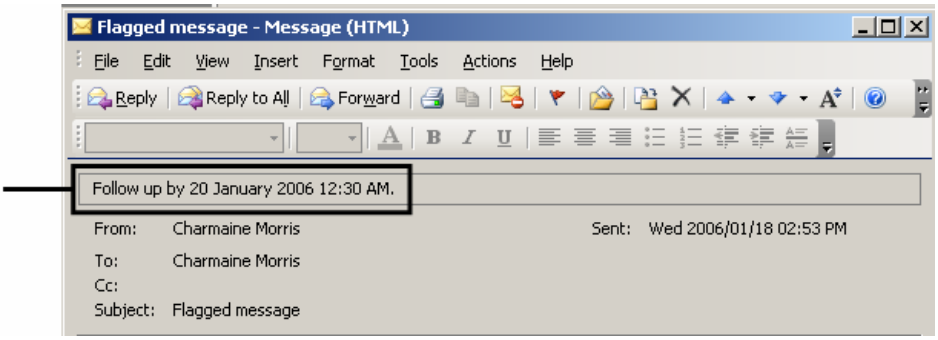
ACTIONS THAT CAN BE TAKEN

Follow up	For your information	Forward	No response necessary
Read	Reply	Reply to all	Review

Create a new mail
Enter the recipient's name
Type the subject and message
Click the MESSAGE FLAG button
From the FLAG TO list, click the action
From the DUE BY list, click the date and time by which you have to take action
Click OK
Click SEND



When the recipient opens the message, it will look like the one displayed below. The recipient/s can then reply or forward the message

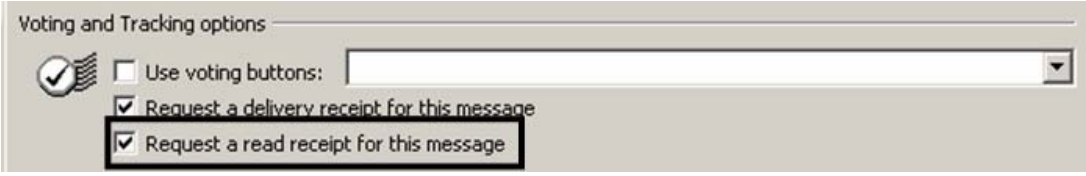


4.10 READ RECEIPTS

There are times when you want to know if a recipient has read your message. You can check when the messages that you send, are read.

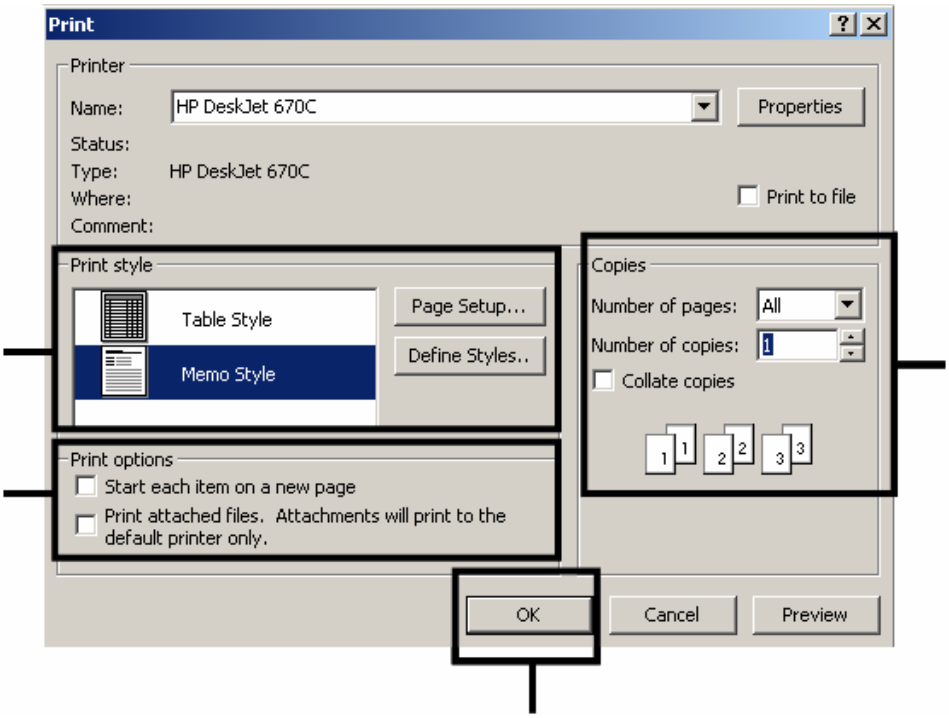
Create a new mail
Enter the recipient's name
Type the subject and message
Click OPTIONS
Tick the checkbox REQUEST A READ RECEIPT FOR THIS MESSAGE
Click CLOSE
Click SEND

When the recipient opens the message, he/she is notified that you have requested a read receipt. HOWEVER, the recipient has the option of sending or denying a read receipt.



4.11 PRINTING MESSAGES

Click FILE
Click PRINT
Specify the number of pages and the number of copies
Specify the print style
Specify the print options
Click PAGE SETUP and the PAPER tab to indicate LANDSCAPE or PORTRAIT
Click OK or PRINT
Click OK again



4.12 ADDRESS BOOKS

There are 3 address books in Outlook.

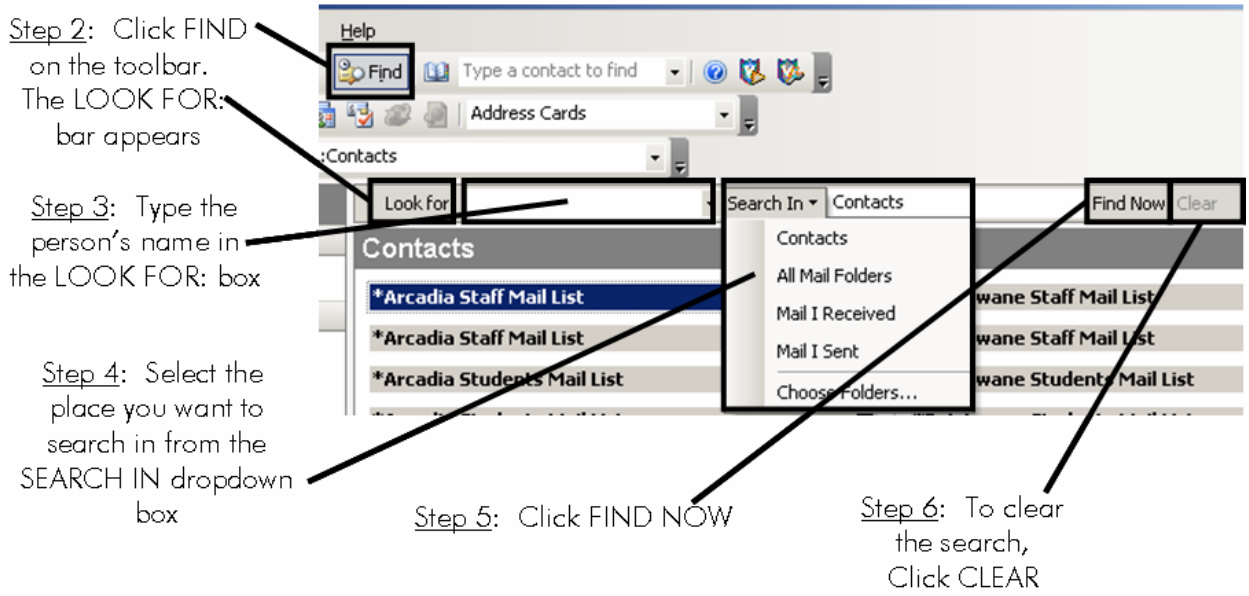
Global: This is the internal address book of all TUT staff and maintained by TUT's e-mail administrator. This address book can NOT be edited.

Contacts: This is also referred to as a PERSONAL ADDRESS book. This address book is private for each user.

Outlook address book: This address book also contains a private list of e-mail addresses and is automatically created from the contacts you create in the Contacts folder. When you update the contact information, the Outlook address book is automatically updated.

4.12.1 FINDING A CONTACT IN THE ADDRESS BOOK

Step 1: Open the CONTACTS folder



4.12.2 SENDING A MAIL FROM THE ADDRESS BOOK

Follow the previous steps to find the person
Double-click on the person's address
Click ACTIONS
Click NEW MESSAGE TO CONTACT

4.12.3 ADDING A CONTACT TO AN ADDRESS BOOK

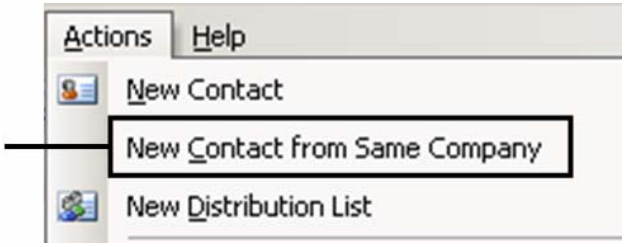
Open the address book by clicking on the address book on the toolbar
Click FILE
Click NEW ENTRY
Click NEW CONTACT
Select PUT THIS ENTRY IN THE option
Select CONTACTS
Add the person's details
Click SAVE AND CLOSE

4.12.4 EDITING A CONTACT

Open the address book by clicking on the address book on the toolbar
Go to the CONTACTS ADDRESS BOOK
Find the person's address
Double-click the person's name
Edit the details
Click SAVE AND CLOSE

4.12.5 ADDING CONTACTS FROM THE SAME COMPANY

Activate the CONTACTS folder
Select a person's name
Click ACTIONS
Click NEW CONTACT FROM SAME COMPANY
Complete the details
Click SAVE AND CLOSE



Outlook = GroupWise

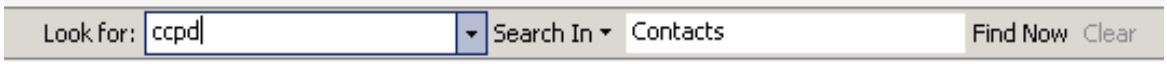
Equivalent of GroupWise in Outlook 3 - Groups

4.13 DISTRIBUTION LISTS

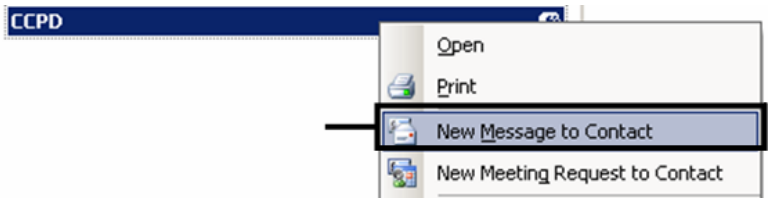
4.13.1 CREATING A DISTRIBUTION LIST

Activate the CONTACTS folder
Click FILE
Click NEW
Click DISTRIBUTION LIST
Give the list a name
Click SELECT MEMBERS
When all the members have been selected, click OK
Click SAVE AND CLOSE

4.13.2 SENDING A MESSAGE TO A DISTRIBUTION LIST



Activate the CONTACTS folder
Type the name of the distribution list in the LOOK FOR box
Click FIND NOW
When the distribution list appears, right-click on it
Click on NEW MESSAGE TO CONTACT



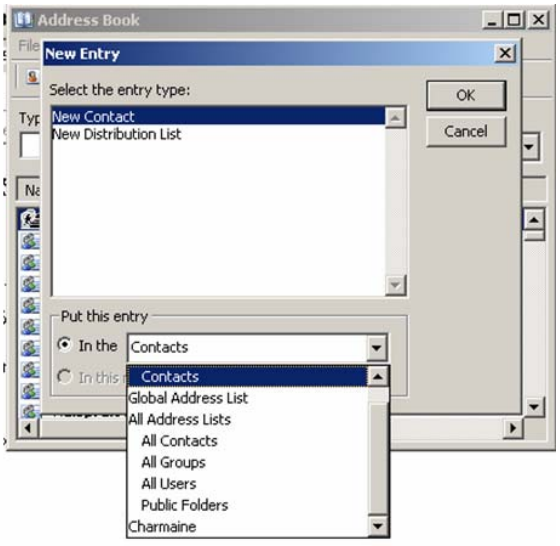
4.14 CREATING A PERSONAL ADDRESS BOOK

Click TOOLS
Click E-MAIL ACCOUNTS
Click ADD NEW DIRECTORY OR ADDRESS BOOK
Click ADDITIONAL ADDRESS BOOKS
Select PERSONAL ADDRESS BOOKS
Give the address book a name
Click OK
Close OUTLOOK
Launch OUTLOOK again to activate the address book

4.14.1 ADDING EXTERNAL CONTACTS TO YOUR PERSONAL ADDRESS BOOK

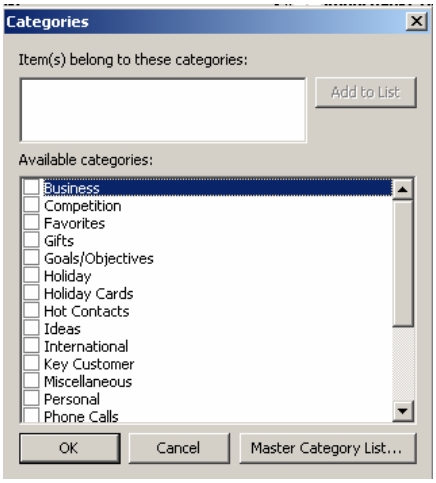
Open the address book by clicking on the address book on the toolbar

Click FILE
Click NEW ENTRY
Click NEW CONTACT
Select your personal address book from PUT THIS ENTRY IN THE option
Select your address book
Select INTERNET ADDRESS
Click OK
Add the person's details
Click OK



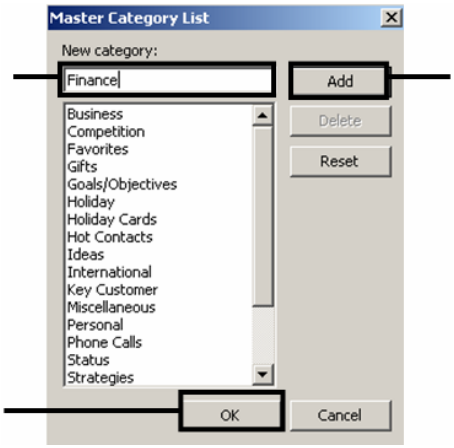
4.15 CATEGORIES

A category is a word, phrase or term that is assigned to Outlook items so that items that relate to each other can be grouped. This makes it easy to organize and find items. This can be used in the calendar, messages and contacts.



4.15.1 CATEGORISING CONTACTS

Activate the CONTACTS folder
Find a contact to categorize
Click EDIT
Click CATEGORIES
OR
Right-click the contact
Click CATEGORIES
Tick the appropriate category
Click OK



4.15.2 CREATING YOUR OWN CATEGORY

Click EDIT
Click CATEGORIES
Click MASTER CATEGORY LIST
Give the new category a name
Click ADD
Click OK

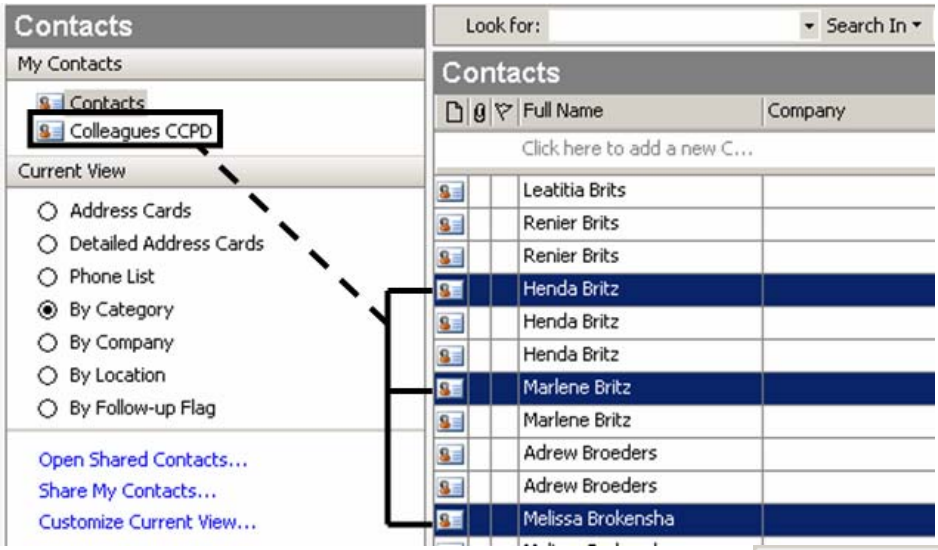
4.16 FINDING A CATEGORY

Activate the CONTACTS folder
Select the BY CATEGORIES VIEW
If you cannot see all the items under a category, click on the + to expand the view

4.17 MAIL MERGE WIZARD

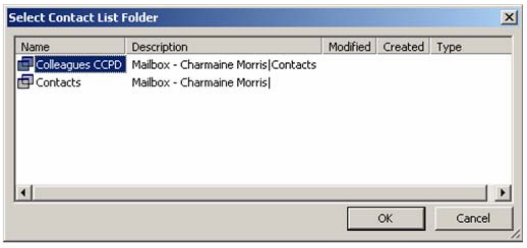
If you would like to send the same letter to a group of people, you can use the mail merge wizard.

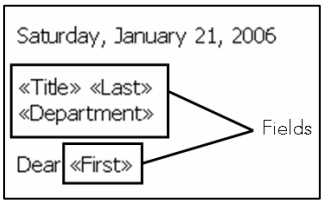
Activate the CONTACTS FOLDER
Create a NEW FOLDER by right-clicking on the CONTACTS FOLDER and selecting NEW FOLDER
Give the folder a name
Click OK
Drag the contacts that you need from the CONTACTS FOLDER to your folder

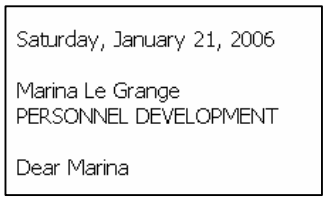


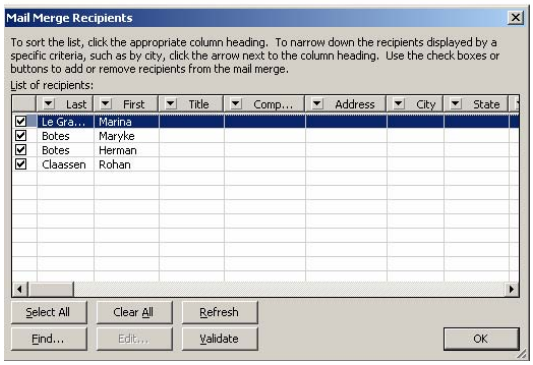
Create new mail
Type the letter in the message area
Click FILE
Click SAVE AS
Give the document a name
Click TOOLS
Click LETTERS AND MAILINGS
Click MAIL MERGE to switch the mail merge task pane on
Select E-mail messages from document type
Click NEXT
Select USE THE CURRENT DOCUMENT
Click NEXT
Click SELECT FROM OUTLOOK CONTACTS
Select CHOOSE CONTACTS FOLDER
Click OK
Select the CONTACTS
Click OK

Select the fields you want to use by clicking either on the ADDRESS BLOCK or MORE ITEMS
Click NEXT: PREVIEW YOUR E-MAIL MESSAGES
Click NEXT to complete the merge
Click ELECTRONIC MAIL
Click OK
Click SAVE
Click CLOSE



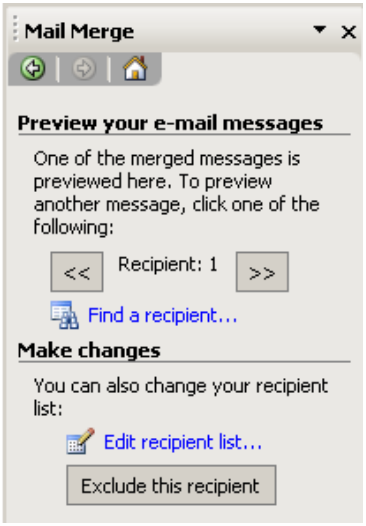


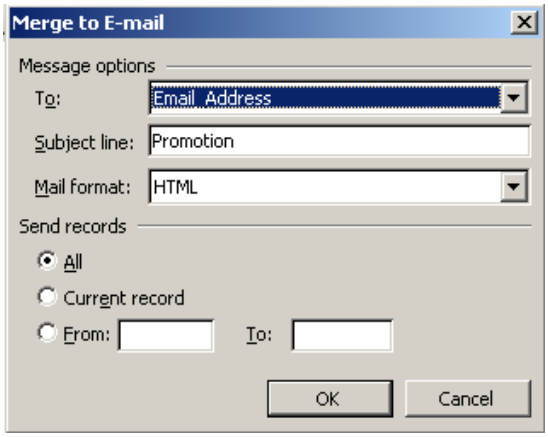




Tip 6 - Mail merge in Word

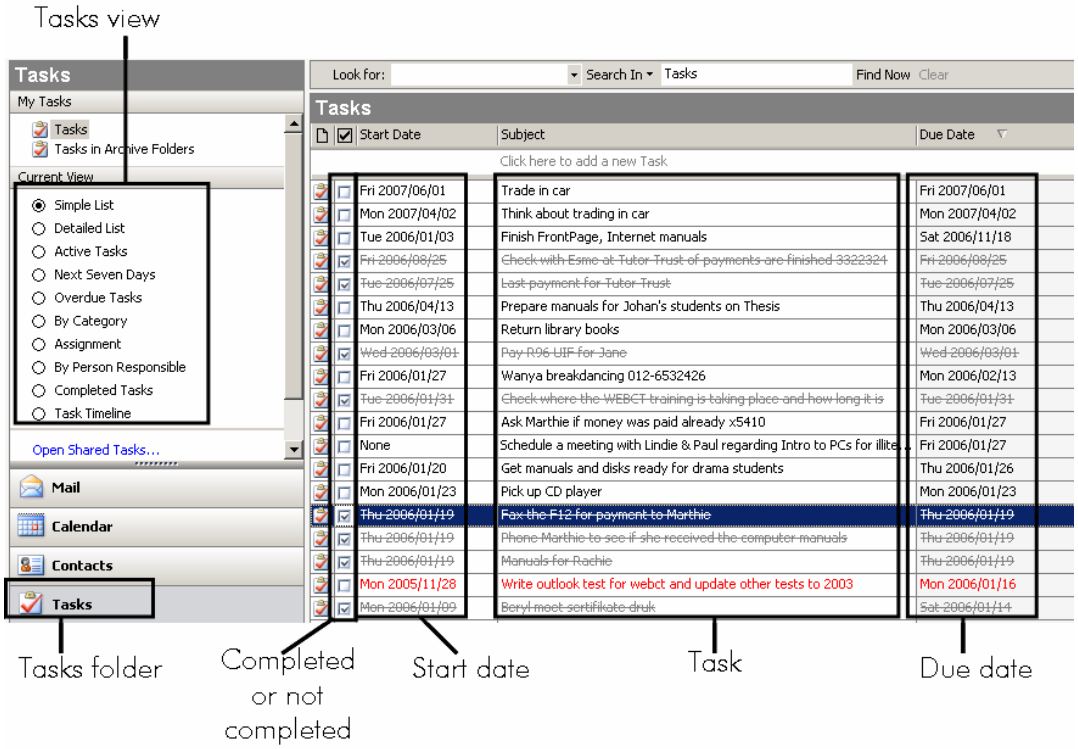
This feature can be used in MS Word using the same principle.





4.18 TASKS

A task is something that must be completed within a certain period of time. Tasks can also be categorized.

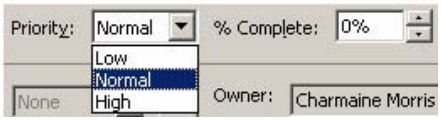


4.18.1 CREATING TASKS

Click NEW
Enter a subject
Select a DUE DATE and a START DATE
Select a STATUS
Select a PRIORITY
Select a COMPLETION %
Click on the check box to set a reminder if you want to
Type a message
Click SAVE and CLOSE

4.18.2 EDITING A TASK

Open the task
Do the necessary editing
Click SAVE AND CLOSE

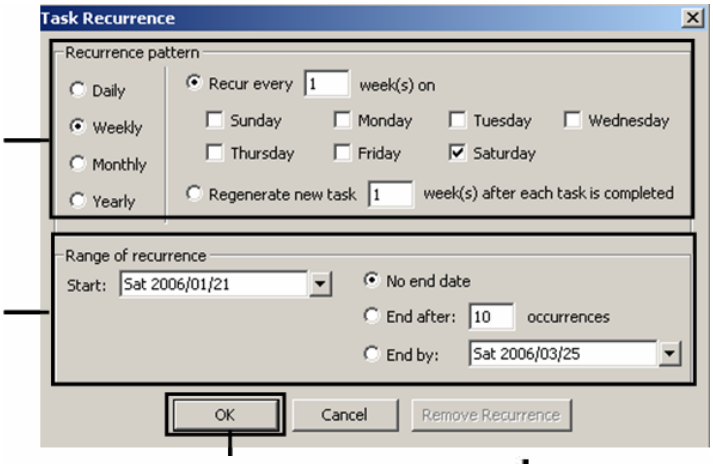


4.18.3 DELETING A TASK

Select the task
Press DELETE on the STANDARD TOOLBAR

4.18.4 RECURRING TASKS

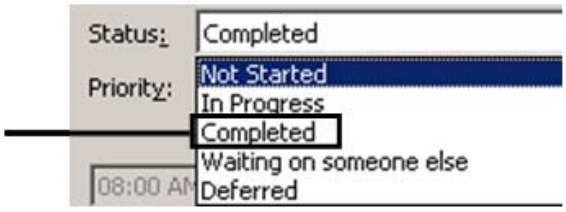
Open a new task window
Type in the required information
Click RECURRENCE to open the dialog box
Specify the options for the recurrence pattern, for e.g. daily, weekly, monthly, yearly, range of recurrence, end.
Click OK
Click SAVE AND CLOSE

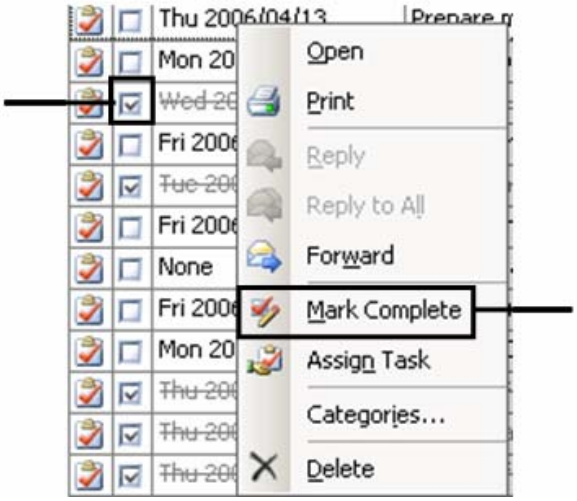


4.18.5 MARKING TASKS COMPLETE

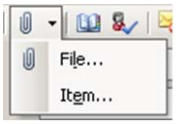
There are 4 different ways to do this:

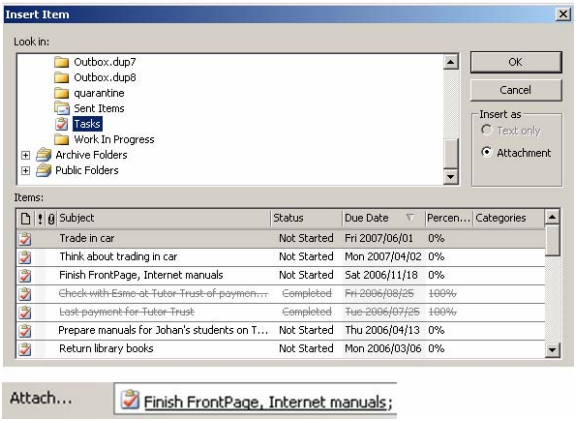
Open the task and select 100% in the COMPLETE box
OR
Open the task and select COMPLETED from the STATUS LIST
OR
Right-click the task and choose MARK COMPLETE from the shortcut menu
OR
Check the box near the task in the FOLDERS CONTENTS LIST





4.18.6 INSERTING TASKS INTO MESSAGES



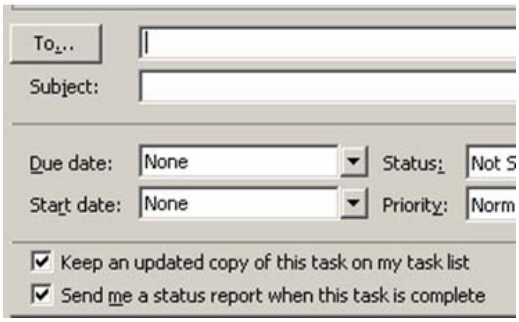


Open a new message window
Click TO and put in the recipient's name
Click the dropdown arrow to the right of the paper clip (this is the INSERT FILE option)
Select ITEM
Open the TASKS folder
Select a task
Click OK
The task is inserted in the attachment box
Click SEND

4.18.7 ASSIGNING CATEGORIES TO A TASK

Activate TASKS
Open a task
Click CATEGORIES
Select a CATEGORY
Click OK
Click SAVE AND CLOSE

4.18.8 ASSIGNING TASKS TO OTHERS

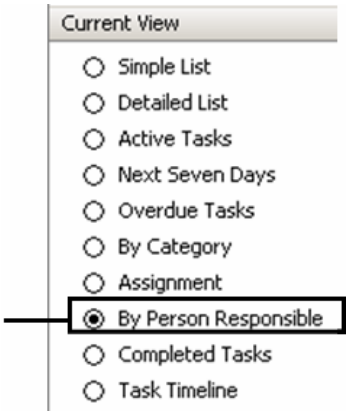


Create a task
Click ASSIGN TASK BUTTON
The TO box appears
Enter the recipients address
If you want to keep a copy, check the KEEP AN UPDATED COPY OF THIS TASK ON MY TASK LIST
If you want to be notified when the recipient marks the task completed, check SEND ME A STATUS REPORT WHEN THIS TASK IS COMPLETE
Click SEND

4.18.9 ACCEPTING OR DECLINING ASSIGNED TASKS

To accept a task request, open the task request message
Click ACCEPT
To decline a task request, open the task request message
Click DECLINE

4.18.10 SENDING A TASK STATUS REPORT

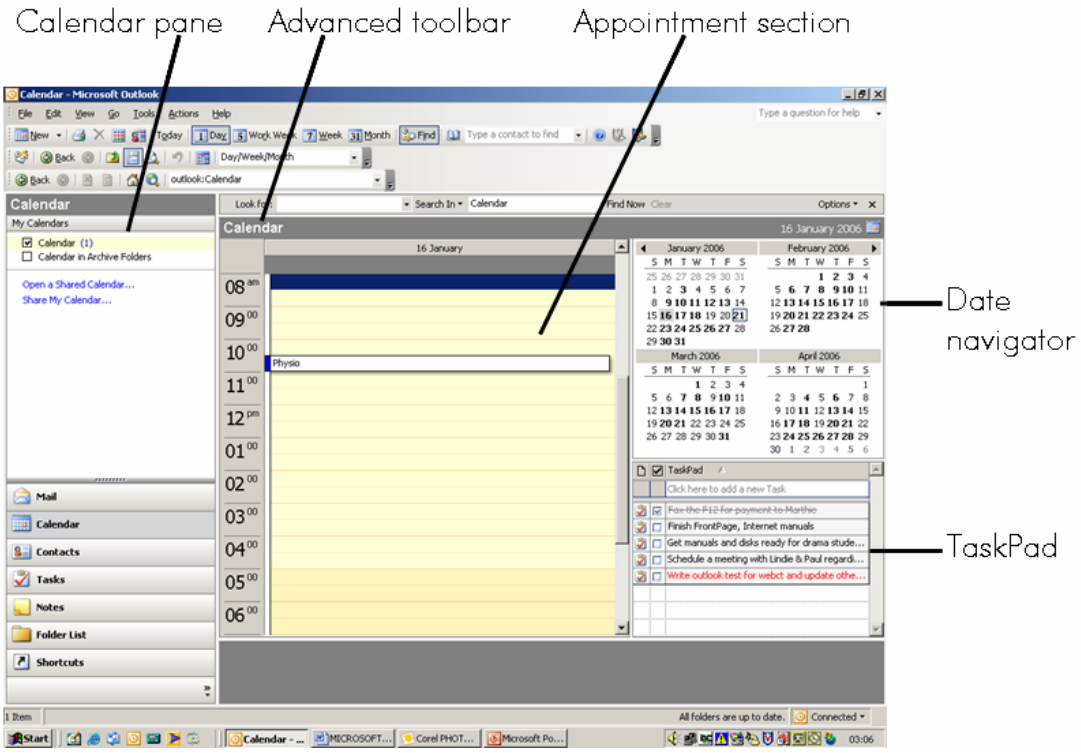


Activate tasks
Switch to BY PERSON RESPONSIBLE view
Open the assigned task
Make the report
Click SEND STATUS REPORT to open the REPLY MESSAGE WINDOW
Click SEND

4.18.11 TRACKING A TASK

Activate TASKS
Open the assigned task
Change the status to COMPLETED
Close the task window
Activate MAIL
Click SEND/RECEIVE to send and receive a final status report

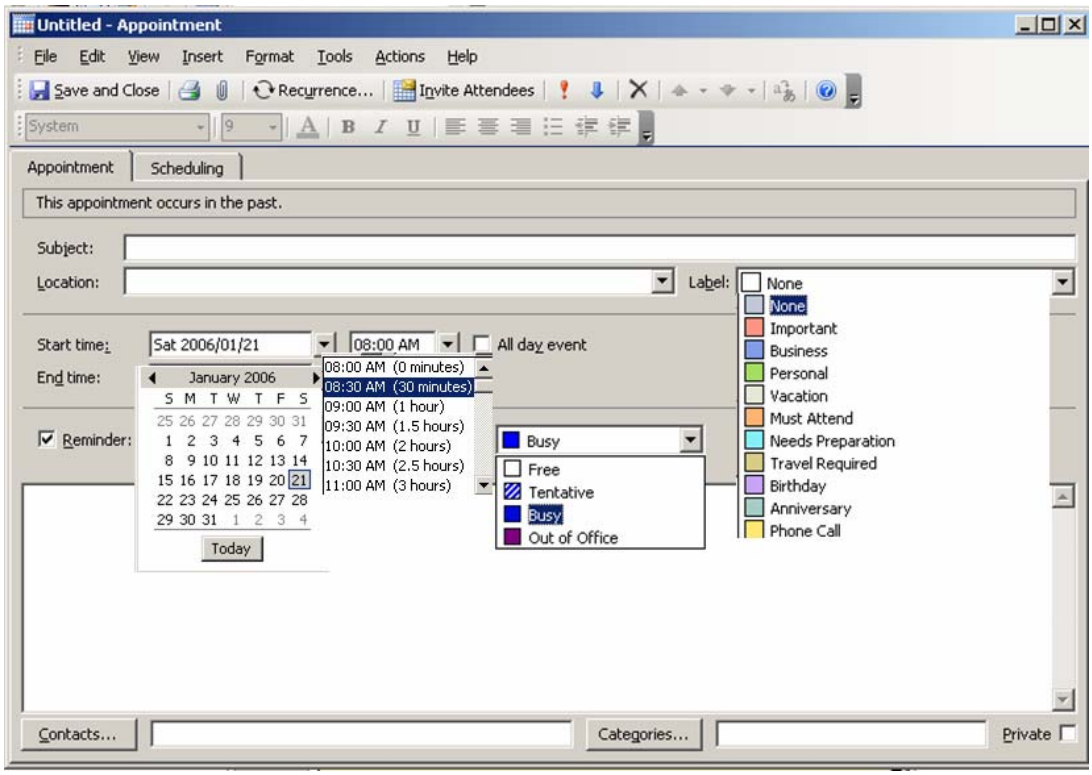
4.19 APPOINTMENTS (THE CALENDAR)



4.19.1 CREATING APPOINTMENTS

Click ACTIONS
Click NEW APPOINTMENT
OR
Click the NEW BUTTON on the STANDARD TOOLBAR
OR
Click CTRL & N
OR
Double-click on the calendar

Indicate the subject, time, duration and location
You can set a reminder if you want to
An appointment can also have an availability status of Free, Tentative, Busy or Out of Office. There is a colour associated with each status.
Click SAVE and CLOSE

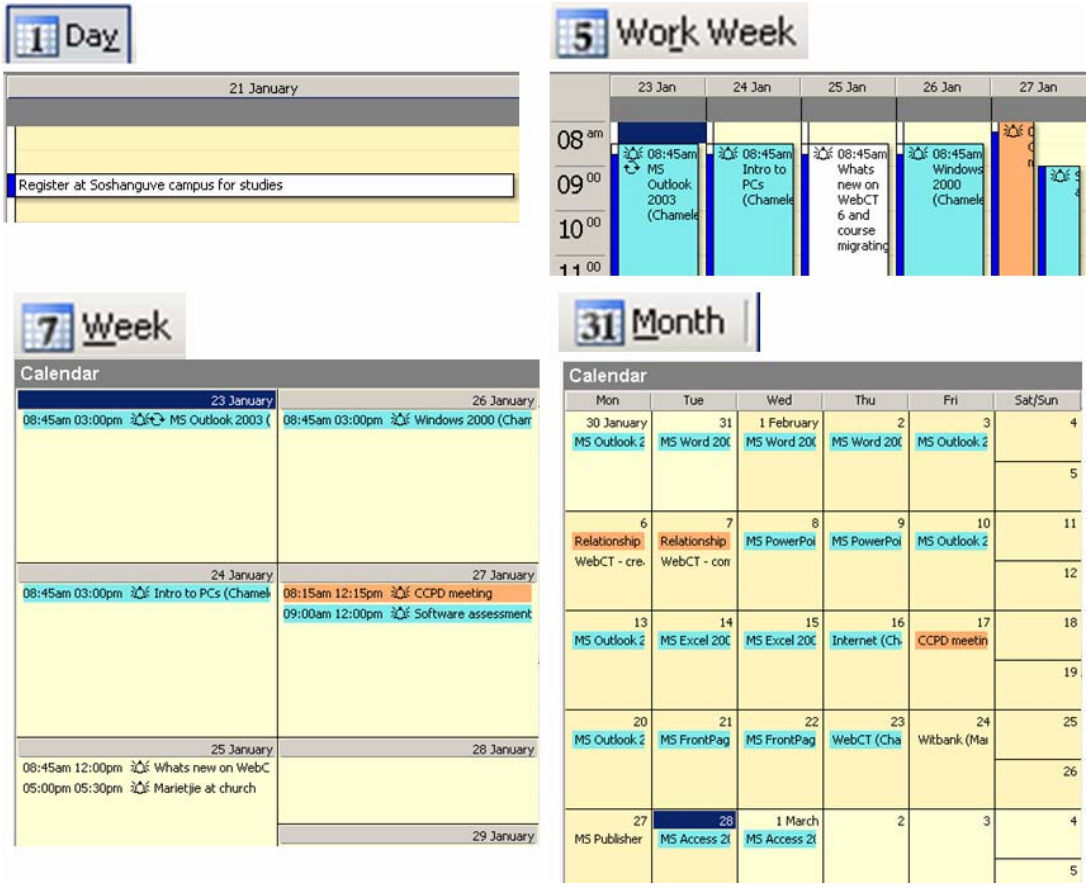


4.19.2 ADDING RECURRING APPOINTMENTS

Click ACTIONS
Click NEW RECURRING APPOINTMENT
OR
Click ACTIONS
Click NEW APPOINTMENT
Click RECURRENCE
Set the APPOINTMENT TIME
Set the RECURRENCE PATTERN
Set the RANGE OF RECURRENCE
Specify the LOCATION and SUBJECT
Click SAVE AND CLOSE

4.19.3 CALENDAR VIEWS

Click on the STANDARD TOOLBAR to select one of these views

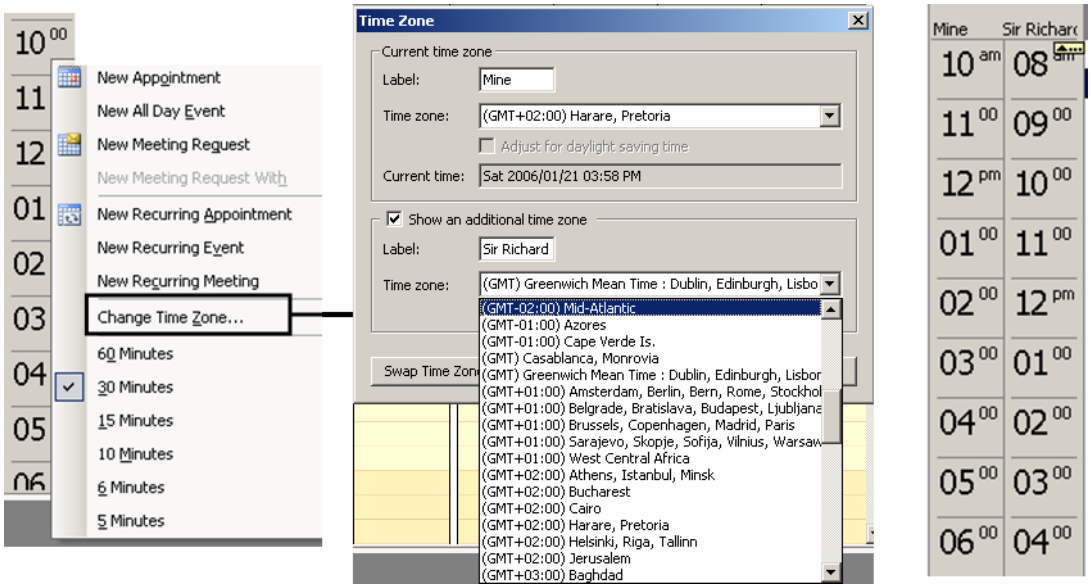


4.20 SETTING UP MULTIPLE TIME ZONES

This option is good for when you have to schedule activities with people located around the world.

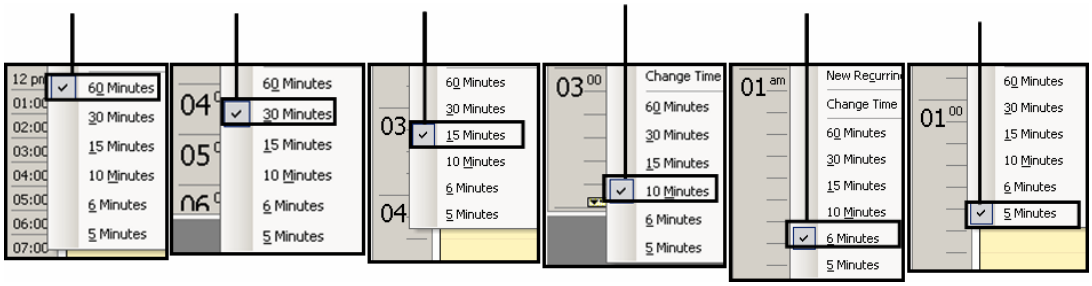
4.20.1 CREATING MULTIPLE TIME ZONES

Right-click on the time area
Click on CHANGE TIME ZONE
Click the SHOW AN ADDITION TIME ZONE box
Give your time zone labels (for e.g. mine, client's)
Select the client's time zone
Click OK



4.20.2 CHANGING THE TIME INTERVAL

Right-click in the time zone
Select the option you would like to use



4.20.3 CATEGORIZING APPOINTMENTS

You can categorize new appointments as well as appointments that have already been made

Open a new appointment or a previously created appointment
Click CATEGORIES
Select the category
Click OK
Click SAVE and CLOSE

4.20.4 USE COLOURS TO DISTINGUISH APPOINTMENTS

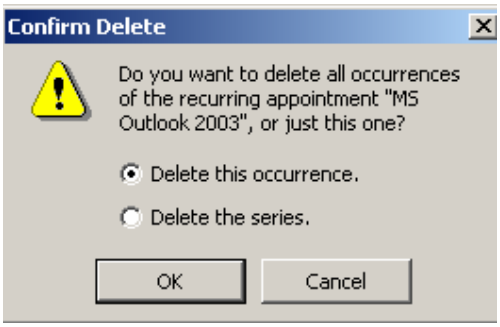
Open a new appointment or a previously created appointment
From the LABELS list, select a label
Click SAVE AND CLOSE

4.20.5 MODIFYING APPOINTMENTS

Double-click an appointment to open it
Make the necessary changes
Click SAVE and CLOSE

4.20.6 DELETING APPOINTMENTS

Right-click an appointment
Click DELETE



Tip 7 - Deleting appointments

If it is a recurring appointment, it will first ask if you want to delete this occurrence or the whole series

4.20.7 RESTORING APPOINTMENTS

Select the appointment you want to delete
Change to DAY VIEW
Delete the appointment
Activate the FOLDERS LIST
Open the DELETED FILES FOLDER
Drag the appointment back to the CALENDAR FOLDER
Activate the calendar to verify if it has been restored

Tip 8 - Deleting items permanently

Select the items you want to delete
Press SHIFT and DELETE
This works for all types of items

4.20.8 MULTI-DAY EVENTS

These are events that last for more than one day.

Click ACTIONS
Click NEW ALL DAY EVENT
Indicate the START and END dates, the subject and a reminder
Click SAVE AND CLOSE

4.20.9 ADD ANNUAL EVENTS

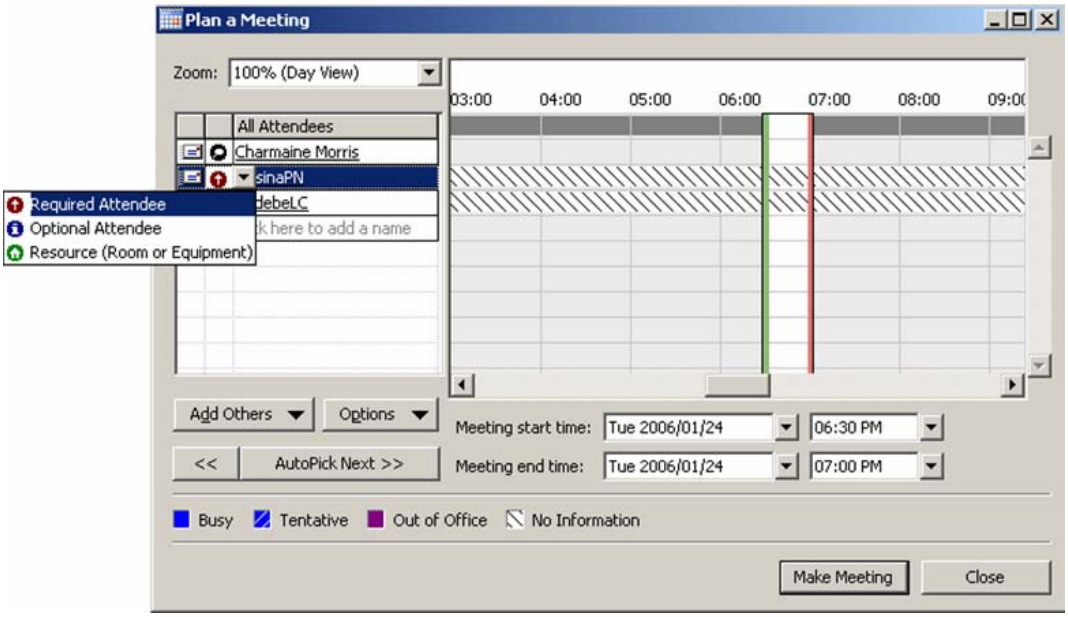
These are events that occur once a year on a specific day. For e.g. birthdays, anniversaries, Valentine's Day.

Click ACTIONS
Click NEW ALL DAY EVENT
Enter the subject, location and date
Click RECURRENCE
Select YEARLY
Click OK
Click SAVE AND CLOSE

4.21 MEETING REQUESTS

4.21.1 ORGANIZING A MEETINGS

Click ACTIONS
Click PLAN A MEETING
Click ADD OTHERS and specify the attendees you want to invite to the meeting
Under OPTIONS, AUTOPICK, click REQUIRED if the attendees have to attend
Specify the START and END times
Click MAKE MEETING
Don't forget to put the SUBJECT and LOCATION in
Click SEND

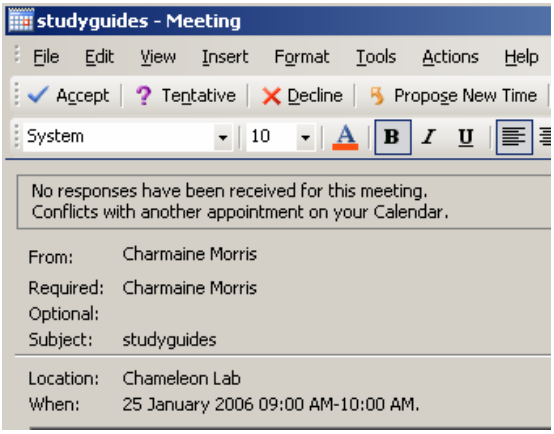


4.22 RESPONDING TO MEETING REQUESTS

When you receive a meeting request, you can either accept or decline it or keep it as tentative.

4.22.1 READING AND ACCEPTING A MEETING REQUEST

Active your INBOX
Double-click on the meeting request
Click ACCEPT or TENTATIVE or DECLINE or PROPOSE NEW TIME depending on what your schedule
If you ACCEPT, TENTATIVE OR PROPOSE NEW TIME, Outlook enters it as a meeting in your Calendar
If it conflicts with another meeting, it warns you
If you decline, it will not enter it into your calendar



4.22.2 CANCELLING A MEETING

Select the meeting you want to cancel
Delete the meeting
A warning box appears with 2 options
Select the top option

Click OK
Click SEND
Activate MAIL
Open the message that says CANCELED: <xx>
Click REMOVE FROM CALENDAR
Activate the calendar
The meeting should be removed

4.22.3 MOVING MESSAGES BETWEEN FOLDERS

You can drag and copy messages from one folder to another folder.

To move a message: Click on the message and hold your mouse button down.
Drag the message to another folder.
To copy a message: Repeat the above step, but hold your CTRL key down.

4.23 ORGANIZING MESSAGES USING COLOURS

Select the FOLDER for MESSAGE
Click TOOLS
Click ORGANIZE
Click USING COLOURS
Click APPLY COLOUR

4.24 FILTERING JUNK E-MAIL

When you receive offensive or unwanted junk e-mail, you can send it to the JUNK E-MAIL FOLDER.

4.24.1 TO SET THE OPTIONS FOR FILTERING JUNK E-MAIL

Click ACTIONS
Click JUNK E-MAIL
Set the relevant options
Click OK

4.25 SIGNATURES

A signature is personalized text and/or pictures that can be added to the end of a message.

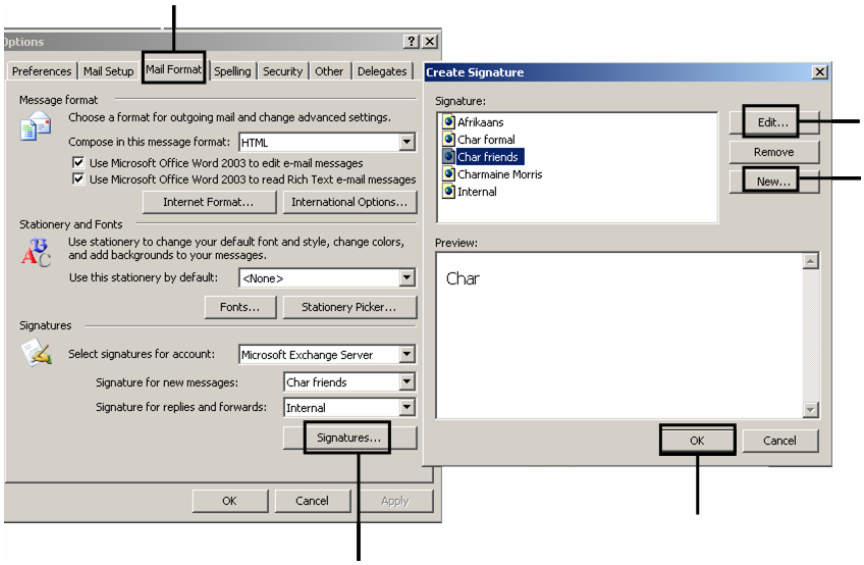
Click TOOLS
Click OPTIONS
Click the MAIL FORMAT tab
Click SIGNATURES
Click NEW
Enter a name for the signature
Click NEXT
Enter the text for the signature in the box
Click FINISH

Tip 9 - Creating more than one signature

Unlike GroupWise, you can create more than one signature
Follow the above steps for as many signatures as you like

4.25.1 EDITING A SIGNATURE

Click TOOLS
Click OPTIONS
Click the MAIL FORMAT tab
Click SIGNATURES
Select the signature to edit
Click EDIT
Make the necessary changes
Click OK



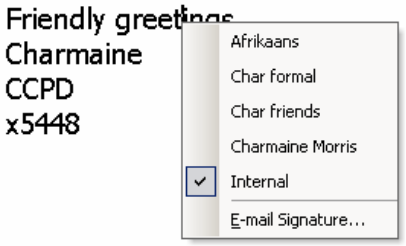
4.25.2 SETTING SIGNATURE FOR MESSAGES, REPLIES AND FORWARDS

You can set a message window so that the signature automatically appears in the message box.

Click TOOLS
Click OPTIONS
Click MAIL FORMAT tab
Click on the dropdown arrows next to the appropriate boxes
Select the signatures you want to set

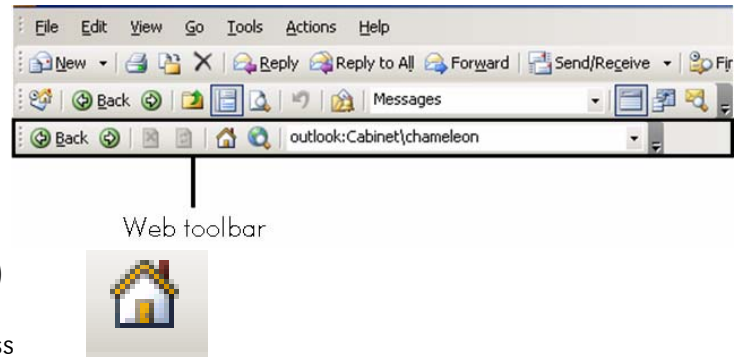
Tip 10 – Working with multiple signatures

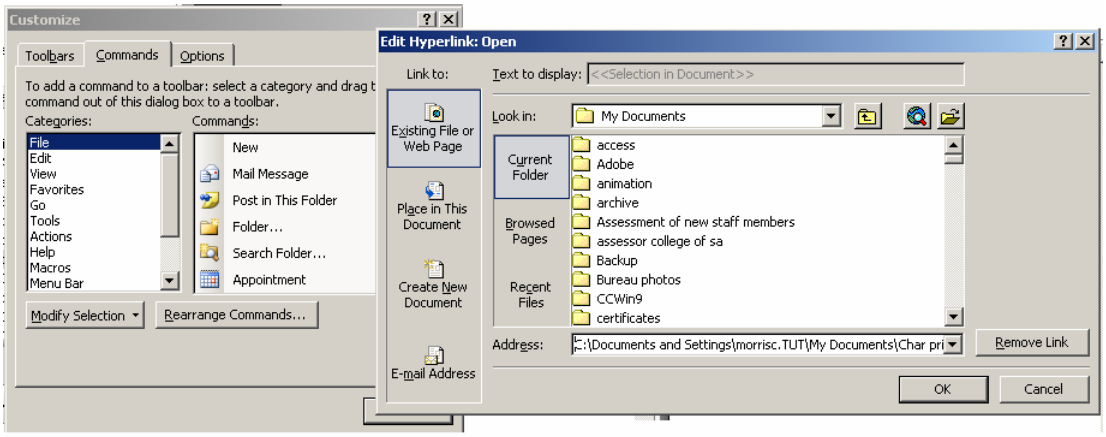
Create the new message
Right-click on the signature currently displayed
Select another signature by clicking on it



4.26 ASSIGNING HYPERLINKS TO BUTTONS OR MENUS

If the WEB toolbar is not visible, then do the following
Click VIEW, TOOLBARS, WEB
Click TOOLS, CUSTOMIZE
Select the COMMANDS tab
Right-click the START PAGE (little house) (This will not work if the CUSTOMIZE DIALOG BOX is not open)
Click ASSIGN HYPERLINK, OPEN
Assign a document link or a web address
Click OK
Click CLOSE





4.27 INTEGRATING OUTLOOK WITH INTERNET EXPLORER

Start INTERNET
Click MAIL BUTTON on the toolbar
Select one of the options
Whichever option you select will open up OUTLOOKS

4.28 CREATING CUSTOM TOOLBARS

Click TOOLS
Click CUSTOMIZE
Select the TOOLBARS tab
Click NEW
Give the toolbar a name
Click OK
Select the COMMANDS tab
Click on a CATEGORY
Select an item
Drag the item onto the new toolbar

4.28.1 DELETING CUSTOM TOOLBAS

Click TOOLS
Click CUSTOMIZE
Select the TOOLBARS tab
Select the new toolbar
Click DELETE
Click CLOSE

Tip 11 - Customizing toolbars

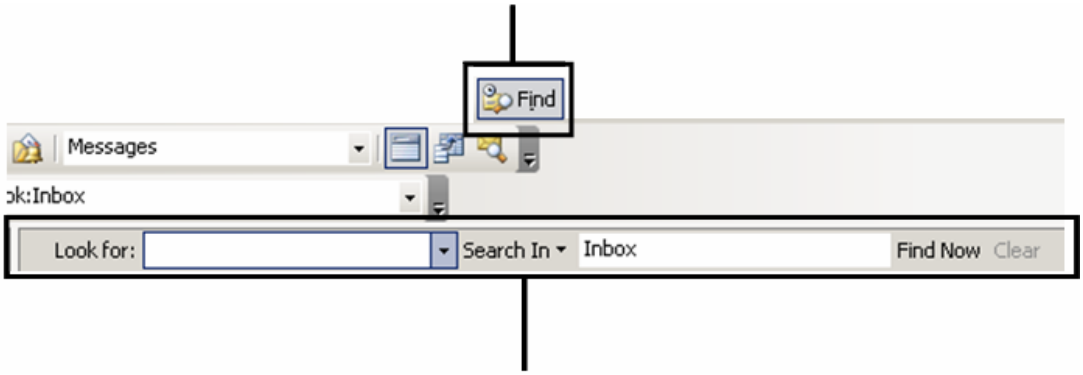
You can customize and delete other toolbar as well
Follow the same steps as above but apply the steps to the other toolbars

4.29 SEARCHING AND FILTERING MESSAGES

You can use the FIND and ADVANCED feature to search for Outlook items such as messages, contacts, etc. You can also customize your Outlook folders to show only those items that meet a certain criteria. This is known as filtering.

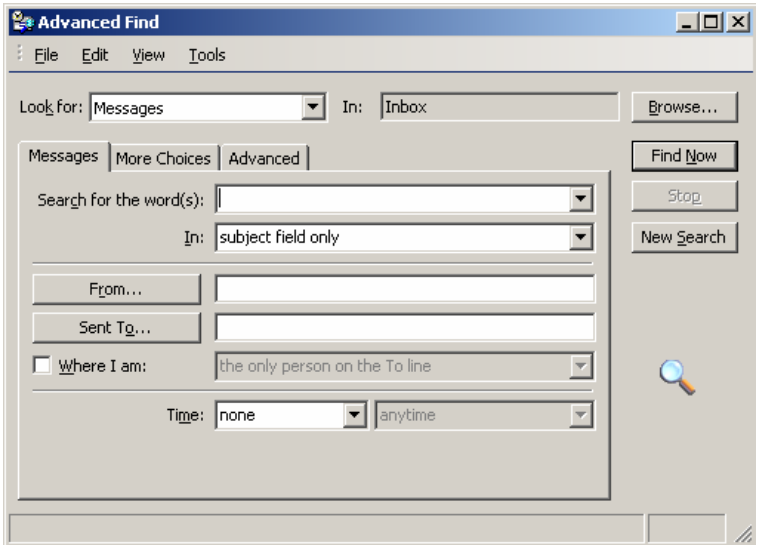
4.29.1 FIND FEATURE

Click MAIL to activate the mailbox
Click on your INBOX
Click FIND on the standard toolbar to display the FIND BAR
In the LOOR FOR box, indicate the key words or phrase to search for
In the SEARCH IN LIST, indicate the FOLDER to search for
Click FIND NOW to begin the search
When the search is finished, click CLEAR to clear the search



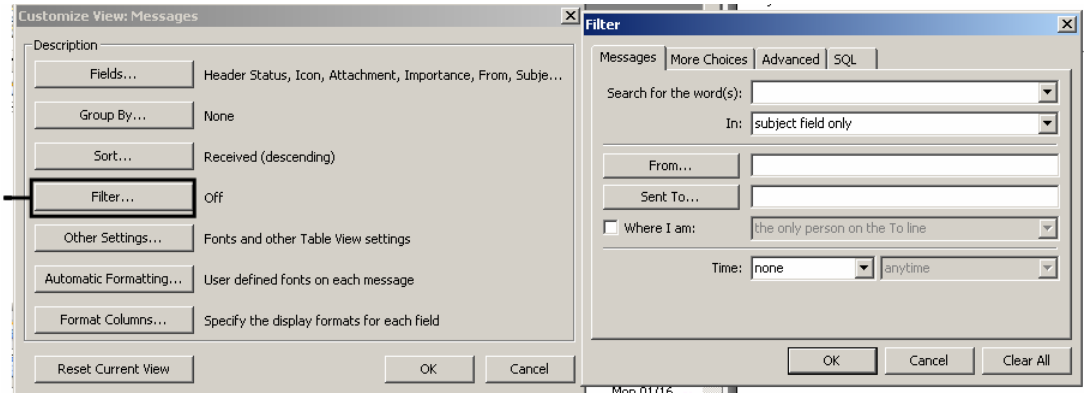
4.29.2 ADVANCED FIND

Click OPTIONS
Click ADVANCED FIND
Select the appropriate criteria
Click FIND NOW



4.29.3 FILTERS

Click VIEW
Click ARRANGE BY
Click CUSTOM
Click FILTER
Select the appropriate criteria
Click OK
Click OK

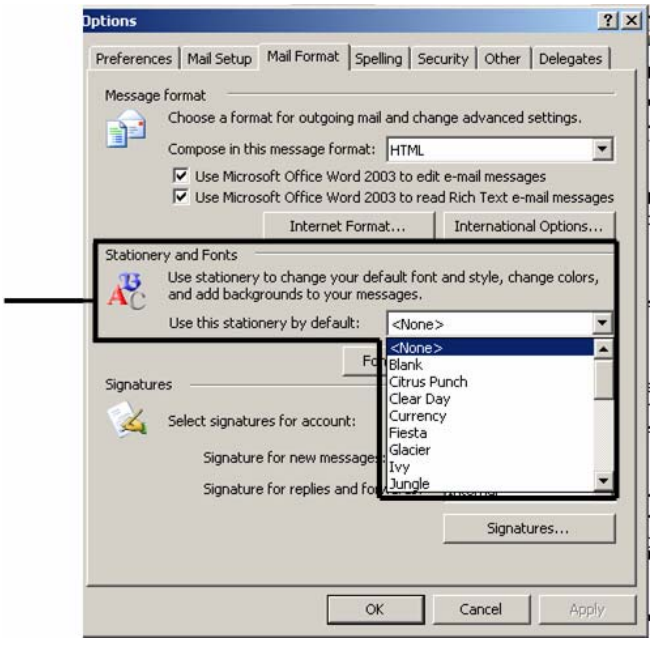


4.29.4 CLEARING FILTERS

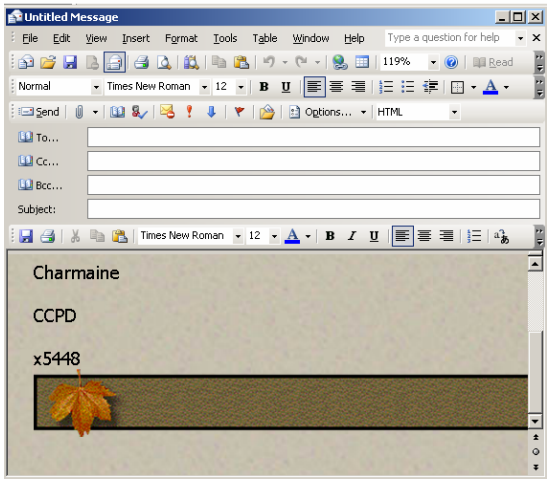
Click VIEW
Click ARRANGE BY
Click CUSTOM
Click FILTER
Click CLEAR ALL
Click OK
Click OK

4.30 MESSAGE STATIONERY

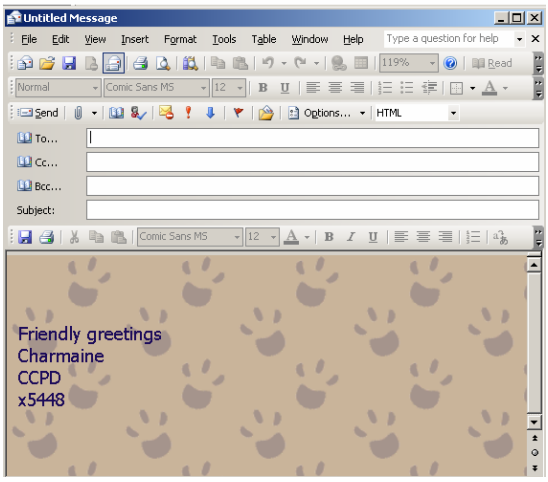
Click TOOLS
Select the MAIL FORMAT tab
Click on the dropdown arrow next to USE THIS STATIONERY BY DEFAULT
Select the stationery you want to use
Click OK
When you next open your new mail message, the stationery will be visible

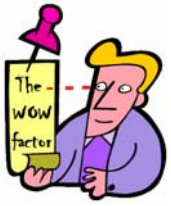


Example of "Leaves" Stationery



Example of "Paw Print" Stationery





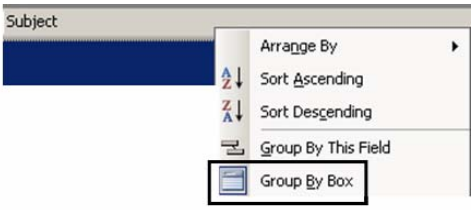
Tip 12 - Create your own stationery

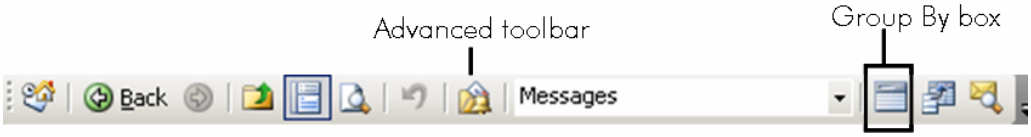
Click TOOLS
Click OPTIONS
Click MAIL FORMAT tab
Click STATIONERY PICKER
Click NEW
Give your stationery a name
Click NEXT
Decide on a BACKGROUND
Click OK
Click OK

4.30.1 ASSIGNING GROUPS TO MESSAGES

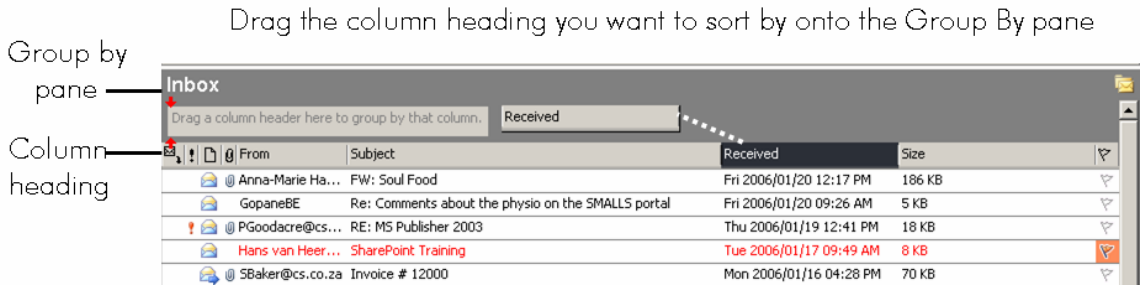
By default, messages are arranged in descending order of the received date. Recent message on top. Oldest at the bottom. However you might want to view messages from a specific person.

Make sure that your ADVANCED toolbar is on
Click VIEW
Click READING PANE, OFF
Right-click on any column heading
Click on the GROUP BY BOX button
OR
Click GROUP BY box on the advanced toolbar





Drag the field you want from the column headings to the Group by pane



4.30.2 REMOVE GROUPS

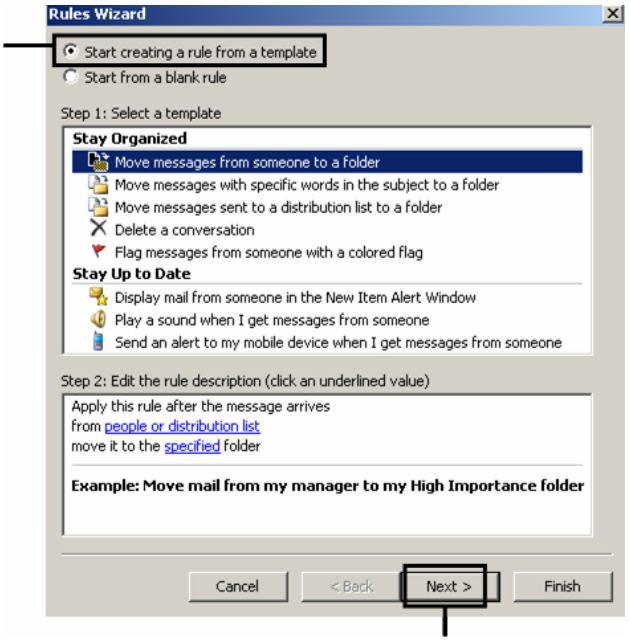
Drag the field from the GROUP BY pane back to the COLUMN HEADINGS

4.31 RULES

This feature helps you to manage items in your INBOX.

4.31.1 CREATING RULES FOR MESSAGES

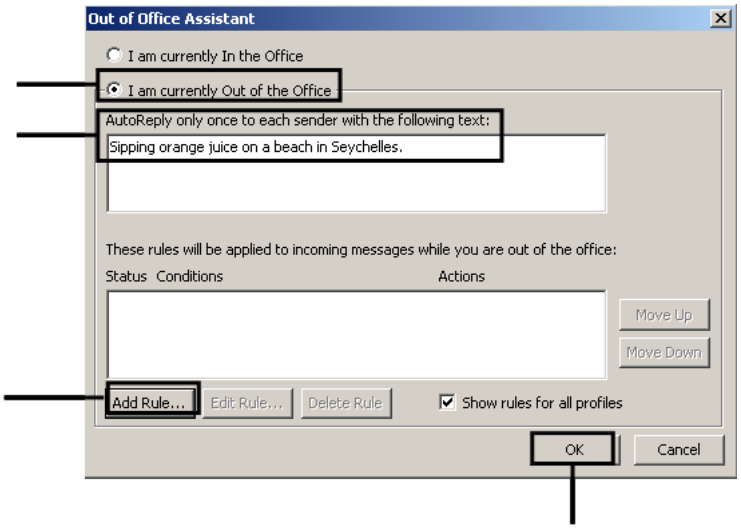
Click TOOLS, RULES AND ALERTS
Click NEW RULE
Select START CREATING A RULE FROM A TEMPLATE
Select a condition
Click NEXT
Select an action
Click NEXT
Select any exceptions to the rule
Click NEXT
Follow the instructions of the wizard until you see FINISH
Click FINISH



Outlook = GroupWise

Equivalent of GroupWise in Outlook 4 - Setting a rule while on holiday

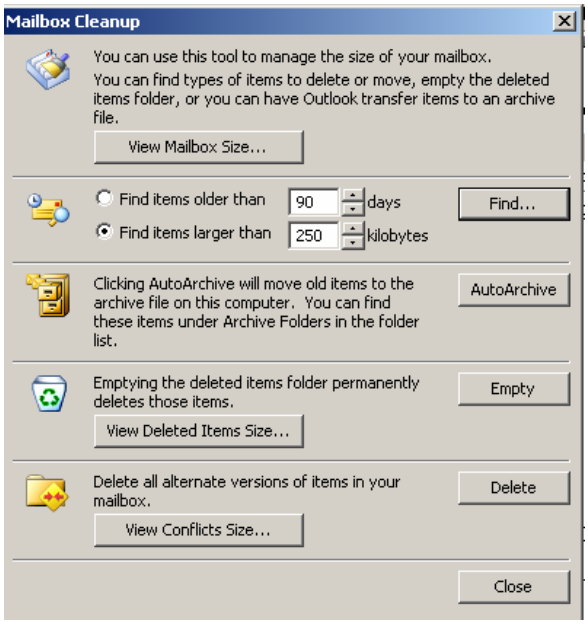
4.31.2 OUT OF OFFICE ASSISTANT



Click TOOLS
Click OUT OF OFFICE ASSISTANT
Select I AM CURRENTLY OUT OF THE OFICE
Specify the text for an AUTOREPLY
(You can create a rule for handling messages)
Click OK

PS. DON'T FORGET TO DEACTIVATE THE RULE WHEN YOU ARE BACK IN THE OFFICE

4.32 MANAGING YOUR MAILBOX



4.32.1 MAILBOX CLEANUP

Click TOOLS
Click MAILBOX CLEANUP
Select the appropriate buttons
Click CLOSE

4.32.2 AUTOMATIC ARCHIVING

Click TOOLS
Click OPTIONS
Click OTHER
Click AUTOARCHIVE
Set RUN AUTOARCHIVE to 10
Set CLEANOUT ITEMS OLDER THAN to 10 DAYS
Click BROWSE
Go to the current unit folder
Edit the file name to read archive1
Click OK
Click OK again

Click OK again
Click FILE
Click ARCHIVE
Select ARCHIVE ALL FOLDERS ACCORDING TO THEIR AUTOARCHIVE SETTINGS
Click OK
Expand the ARCHIVE folder
Click FILE
Click CLOSE ARCHIVE FOLDERS

4.32.3 RESTORING ARCHIVED MESSAGES

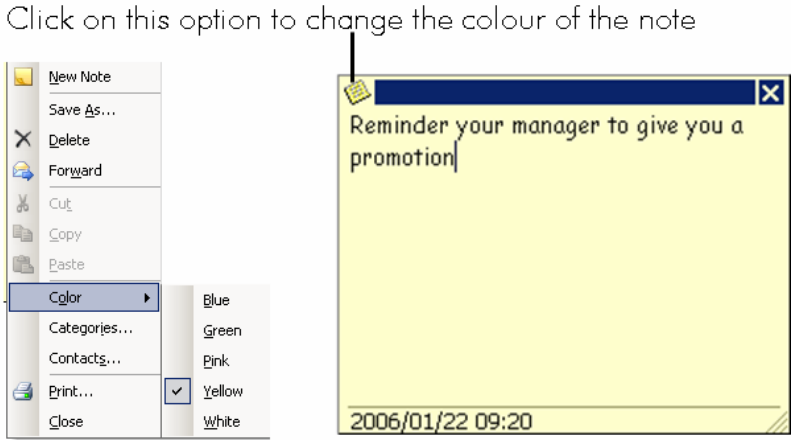
Click FILE
Click IMPORT AND EXPORT
Make sure that IMPORT FROM ANOTHER PROGRAM is selected
Click NEXT
Under OPTIONS, choose ALLOW DUPLICATES TO BE CREATED
Click BROWSE and go to the desired folder
Select the folder and click OPEN
Click NEXT
Click FINISH

4.33 NOTES

Notes can be used as reminders for things you have to do.

4.33.1 CREATING NOTES

Active NOTES
Click NEW
OR
Press CTRL & N
Type your note
Click on the close button

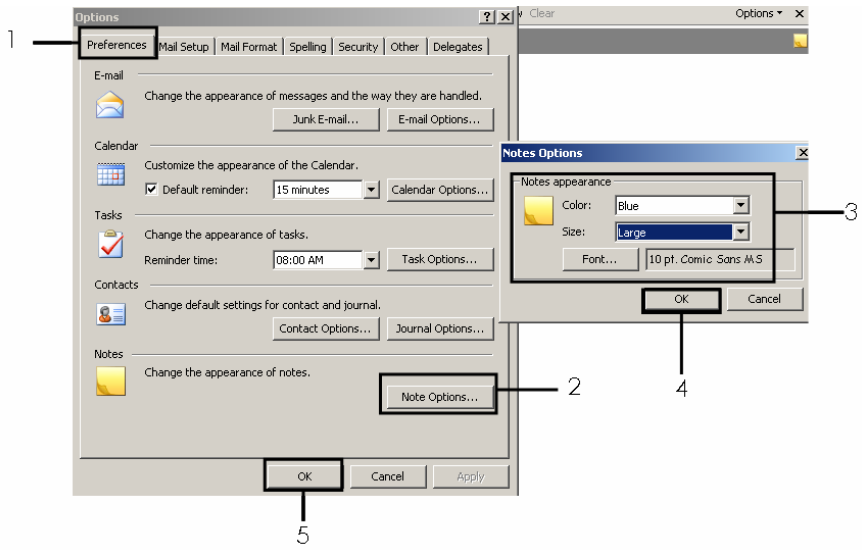


4.33.2 SHARING NOTES

Right-click on the note
Click FORWARD
Type in the recipient's name
Click SEND

4.33.3 CUSTOMIZING NOTES

Click TOOLS
Click OPTIONS
Select PREFERENCES
Click NOTE OPTIONS
Make the necessary changes
Click OK
Click OK

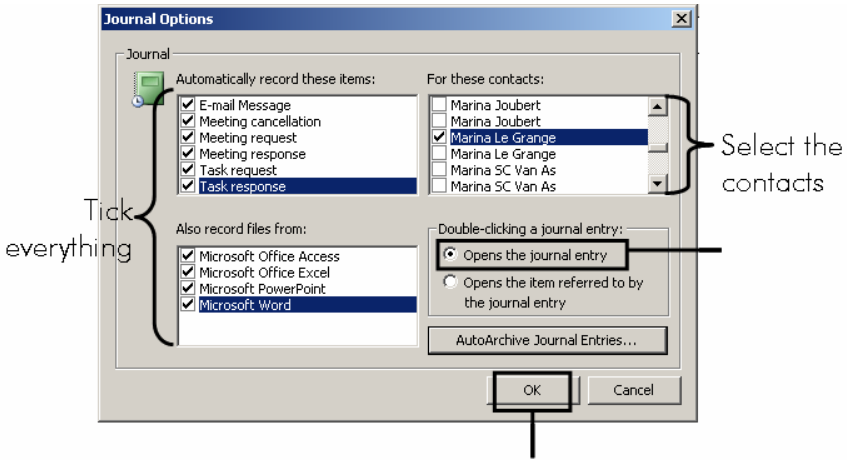


4.34 JOURNAL FOLDER

The Journal is used to manage, document, and tract your communication related to your contacts. It helps you to record the times and dates of your communications. For e.g. you can find out when you received a request for a meeting with a client. It also helps record documents in applications such as Word or Excel.

4.34.1 RECORDING JOURNAL ENTRIES AUTOMATICALLLY

Activate JOURNALS
Tick all the items and files you want to record
Select the contacts
Click OK



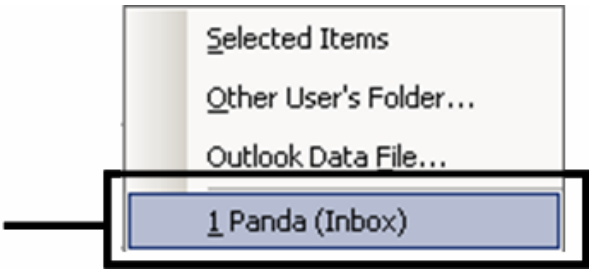
4.35 SHARING OUTLOOK FOLDERS

4.35.1 GRANTING PERMISSION TO VIEW YOUR INBOX

Right-click INBOX
Choose PROPERTIES
Activate the PERMISSIONS tab
Click ADD
Select the person's name you want to share with
Click ADD
Choose the PERMISSION LEVEL
(For e.g. If you select PUBLISHING AUTHOR, your partner has permission to create and read items)
Click OK

4.35.2 ACCESSING A SHARED INBOX

Click FILE
Click OPEN
Click OTHER USER'S FOLDER
Enter the name of the person whose folder you want to access
Click OK
You will be able to view the other person's INBOX
To go back to your inbox, just click on it
To view the other person's inbox again, click FILE, OPEN
Click on the other person's name



4.35.3 REMOVING INBOX PERMISSION

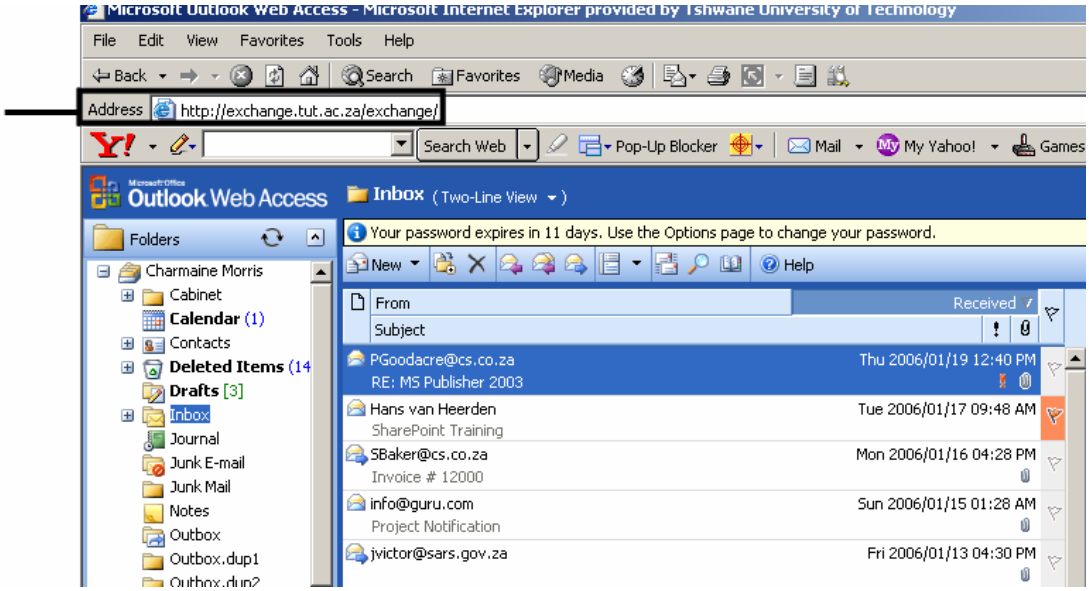
Right-click INBOX
Choose PROPERTIES
Activate the PERMISSIONS tab
Click REMOVE

Tip 13 - You can also share calendars, tasks and contacts

You can also share calendars and contacts
Follow the steps for sharing an inbox
Apply the appropriate calendar and contact options

5 ACCESSING YOUR E-MAIL FROM ANOTHER VENUE

Open the Internet
In the address line, type in 'exchange.tut.ac.za'
Press ENTER
This activates your Outlook



DELICIOUS COMPUTER QUOTES TO MAKE YOUR SMILE

Those parts of the system that you can hit with a hammer (not advised) are called hardware; those program instructions that you can only curse at are called software. ~Author Unknown

Computers have lots of memory but no imagination. ~Author Unknown

The problem with troubleshooting is that trouble shoots back. ~Author Unknown

I just wish my mouth had a backspace key. ~Author Unknown

INDEX

A

ACCEPTING OR DECLINING ASSIGNED TASKS 27
ADDING A CONTACT 20
ADDING CONTACTS FROM THE SAME COMPANY 20
ADDRESS BOOKS 19
ANNUAL EVENTS 33
APPOINTMENTS 28
ARCHIVING 43
ASSIGNING GROUPS 41
ATTACHING FILES 11
AUTOMATION 9

C

CALENDAR 28
CALENDAR VIEWS 30
CATEGORIES 22
COLOURS TO DISTINGUISH APPOINTMENTS 32
CREATING MESSAGES 7
CREATING YOUR OWN CATEGORY 22
CUSTOMIZING OUTLOOK TODAY 4

D

DELETING MESSAGES 13
DELIVERY OPTIONS 15
DISTRIBUTION LISTS 20

E

EDITING A CONTACT 20
E-MAIL MESSAGES 6

F

FILTERS 40
FIND FEATURE 39
FINDING A CATEGORY 22
FINDING A CONTACT 19
FLAGGING MESSAGES 17
FORMATTING MESSAGES 10
FORWARDING MESSAGES 13

H

HELP 1, 5, 6
HYPERLINKS 37

I

IMPORTANCE 14
INBOX 6
INTEGRATING OUTLOOK WITH INTERNET EXPLORER 38

J

JOURNAL 45
JUNK E-MAIL 35

L

LAUNCH MICROSOFT OUTLOOK 2003 1

M

MAIL MERGE WIZARD 23
MAILBOX CLEANUP 43
MEETING REQUESTS 33
MESSAGE SETTINGS 14
MULTI-DAY EVENTS 33

N

NOTES 44

O

OUT OF OFFICE ASSISTANT 43
OUTLOOK TODAY 3

P

PERMISSION 46
PERSONAL ADDRESS BOOK 21
PRINTING MESSAGES 18
PROGRAM WINDOW 1

R

READ RECEIPTS 17
READING MESSAGES 7
READING PANE 1, 3, 41
RECURRING APPOINTMENTS 30
RECURRING TASKS 26
REPLYING TO A MESSAGE 9
RESPONDING TO A MESSAGE WITH VOTING BUTTONS 15
RESTORING MESSAGES 13
RULES 42

S

SAVING ATTACHMENTS 11
SAVING MESSAGES 13
SEARCH FOLDERS 16
SENDING A MAIL FROM THE ADDRESS BOOK 19
SENSITIVITY 14
SHARING 46
SIGNATURES 36
STATIONERY 40

T

TASKS 25
TIME ZONES 31
TOOLBARS 38
TRACKING A TASK 28

V

VOTING AND TRACKING OPTIONS 14