Using Microsoft Office 2007 Introduction to Outlook Handout

INFORMATION TECHNOLOGY SERVICES California State University, Los Angeles

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Microsoft Outlook 2007

Microsoft Outlook 2007 is a comprehensive desktop information management program built to meet multiple communication needs. Users can use Outlook as a central inbox for all internal and external e-mail messaging systems. Users can also use it to manage their contacts, organize their calendar, schedule appointments, and maintain a journal of their activities. Additionally, Outlook integrates a number of features to help users manage their files, folders, and system resources. The purpose of this handout is to provide step-by-step instructions on how to set up and use Outlook.

More information about Outlook can be found at <u>http://www.calstatela.edu/outlook</u>.

Starting Outlook

To start Outlook, click the Outlook icon on the desktop or:

- 1. Select the Start menu ► All Programs ► Microsoft Office ► Microsoft Office Outlook 2007. The *Enter Network Password* dialog box will open (see Figure 1).
- 2. In the *User Name:* text box type user name.
- 3. Enter the user password in the *Password:* text box ► **OK** button.

| Enter Net | work Passv | vord | X |
|-----------|--------------|--------------------------------|---|
| ? | Type your us | ser name and password. | |
| , | Server | santafe4 | |
| | User Name: | ITStraining1 | |
| | Password: | ******* | |
| | Save this | password in your password list | |
| | | OK Cance | ! |

Figure 1 - Enter Network Password Dialog Box

<u>NOTE</u>: If password authentication can be used to automatically log into the server, the prompt seen in Figure 1 will not appear and Outlook will start automatically. If multiple profiles exist on the computer (i.e., more than one e-mail account) the *Choose Profile* dialog box (see Figure 2) will open before the *Connect* dialog box. The user will need to select the correct profile in the *Profile Name:* drop-down list, and then click the **OK** button.

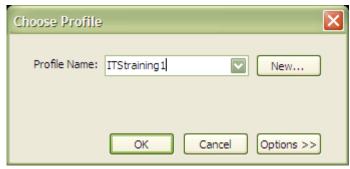


Figure 2 - Choose Profile Dialog Box

Using the Outlook Interface

Microsoft Outlook 2007, like other Windows programs, opens within a window and includes the Title Bar with control buttons (Minimize, Maximize/Restore, and Close). A Menu Bar appears at the top of the window containing short and full menus. When first selecting a menu, only a short menu of commands appears. Clicking the drop-down arrows 💐 at the bottom of each short menu displays the full menu; waiting a few seconds will provide the same result automatically. When a command is chosen on the full menu, it will appear on the short menu the next time it is displayed. The Standard toolbar appears under the Menu Bar and the Status Bar appears at the bottom of the window. By using the Navigation Pane buttons, users can quickly access the Outlook components and folders and control which folder is displayed in the View **Pane**. The area immediately right of the **Navigation Pane** is the **View Pane**; it displays items in the selected folder, application, or shortcut. For example, when the *Inbox* folder is selected, the View Pane displays the date and time of receipt for messages within the *Inbox* folder. Users may change the way information appears by sorting, grouping, and filtering items. To the right, the **Reading Pane** allows users to view e-mail without opening them in a separate window. On the right side of the **Reading Pane** is the **To-Do-Bar** (a new feature in Outlook 2007) that summarizes appointments and tasks in one location.

| Title Bar | Menu Bar | Standard Toolbar | To-Do-Bar |
|-------------------------------------|-----------------------|--|---|
| 🕞 Inbox - Microsoft Outloo | 1 | | - = × |
| | ools Actions Help | | Type a question for help |
| | | 👻 🔊 📑 Send Regeive 🔹 🍅 🛄 Search address books 💽 | · · · · · · · · · · · · · · · · · · · |
| Mail « | 🔄 Inbox | Message from the Provost - WASC Update | To-Do Bar 🔹 » 🗙 |
| | Search Inbox 🔎 👻 🗧 | | November 2008 |
| Inbox (230) Unread Mall | Arranged By: Date 👻 🔺 | Sent: Mon 11/17/2008 11:02 AM | <u>SMTWTFS</u> 26.27.28.29.30.31.1 |
| Sent Items | Today | To: Ce Reading Pane | 2 3 4 5 6 7 8 |
| Mail Folders | | | 9 10 11 12 13 14 15 16 17 18 19 20 21 22 |
| 🔎 All Mail Items 🛛 🗲 🔒 | Navigation Pane | î | 23 24 25 26 27 28 29 |
| Mailbox A Deleted Items (5) | E Last Week | Dear Faculty and Staff: I would like to take this opportunity to share with | 30 1 2 3 4 5 6 |
| Drafts Inbox (230) Staff | Two Weeks Ago | the campus community Cal State L.A.'s plans and progress toward reaccreditation by the Western | 8:00 AM - 5:00 PM |
| G Junk E-mail [5] | Three Weeks Ago | Association of Schools and Colleges (WASC). | TTS Tue 8:00 AM - 1:00 PM |
| Quarantine | Last Month | The WASC accreditation process focuses on student learning. The process also focuses on | © Biol-100C Lab Tue 2:00 PM - 4:30 PM |
| 🖂 Mail | Older | efforts directed at institutional improvement that | 10e 200 PM - 4:50 PM |
| Calendar | | are based on meaningful and comprehensive data and analyses. In addition to ensuring that Cal State | Arranged By: Due Date 🔺 📥 |
| Contacts | View Pane | L.A. meeter ingerous standards of quality, capacity and effect Status Bar stion process | Type a new task |
| 🟹 Tasks | VIEW Faile | provides an opportunity for us to reflect on our | 🖃 🦞 Today |
| . 🗅 🗹 - | | accomplishments, challenges, and future directions. | Weekly Update 🛛 🍸 🖕 |
| 610 Items | | All folders are up to date. 🔀 Conr | nected to Microsoft Exchange * |

Figure 3 – Outlook Window

Table 1 – Outlook Menu and Toolbars

| Item | Description | | | |
|--|--|--|--|--|
| Menu Bar | Contains all of the tools and commands for use with | | | |
| Mellu Bal | Internet Explorer. | | | |
| Standard Toolbar | Contains shortcuts for standard actions and tools in | | | |
| Standard 1001bar | Internet Explorer. | | | |
| Novigotion Dono | Contains shortcuts to folders and locations and to a | | | |
| Navigation Pane | hierarchical list of folders. | | | |
| View Pane Displays the content of the selected folder. | | | | |
| Reading Pane | Displays the content of the selected e-mail message. | | | |
| Title Bar | Displays the application name and the selected function. | | | |
| — — — — — — — — — — | Displays the Date Navigator, Appointments, and Task List | | | |
| To-Do-Bar | all in one location. | | | |

USING THE NAVIGATION PANE

The **Navigation Pane** provides the tools to access the main folders in Outlook (see Figure 4). The **Navigation Pane** is made up of two sections. The bottom section displays large and small buttons used to navigate **Mail, Calendar, Contacts, Tasks, Notes, Folder List,** and **Shortcuts** (see Table 2). In addition, the **Configure buttons** button can be used to display a menu for customizing the **Navigation Pane**.

The top section of the **Navigation Pane** displays shortcuts to corresponding folders, views, and links to shared folders. The content of this section changes depending on the selected pane. For example, in the **Mail** pane, the top pane displays *Favorite Folders* and *All Mail Items*, while in the **Contacts** pane it displays the **My Contacts** and **Current View** panes.

<u>NOTE</u>: To hide or display the **Navigation Pane**, select the **View** menu \blacktriangleright **Navigation Pane** \triangleright **Off**.

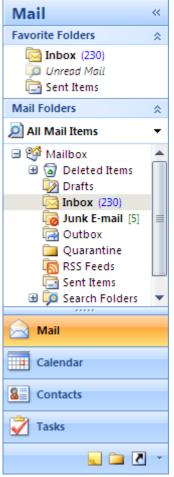


Figure 4 - Navigation Pane

| Button | Description |
|-------------------|--|
| Aail Mail | Provides access to All Mail Folders and Favorite Folders. |
| Calendar | Enables viewing and scheduling of appointments, events, and meetings. |
| Secontacts | Keeps track of addresses, telephone numbers, and e-mail addresses. |
| Tasks | Organizes and helps to prioritize the to-do lists. |
| Notes | Acts like an electronic post-it note for users to write down information. |
| Folder List | Provides access to all folders. |
| Shortcuts | Provides access to all shortcuts. |
| Configure Buttons | Allows to add or remove buttons as well as to change options of the Navigation Pane. |

Table 2 - Navigation Pane Buttons

Configuring the Navigation Pane

Users have the ability to display or hide buttons in the Navigation Pane in addition to changing the order of the buttons.

To change the order of the buttons:

- 1. Click the **Configure Buttons** button (see Table 2) and select the Navigation Pane Options... selection. The *Navigation Pane Options* dialog box opens (see Figure 5).
- 2. Select the item to move and click the **Move Up** or **Move Down** buttons to reposition it ► **OK** button.

<u>NOTE</u>: Clearing any of the items in the dialog box will remove those items from the display.

To add or remove any of the buttons:

- 1. Click the **Configure Buttons** button (see Table 2) and select the <u>Add or Remove Buttons</u> selection to open the **Add or Remove Buttons Menu** (see Figure 6).
- 2. Select the item to display or hide.





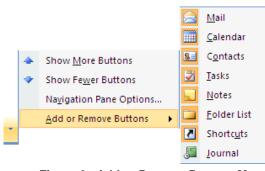


Figure 6 - Add or Remove Buttons Menu

Adding an Item to the Navigation Pane

Users may also add items on the **Navigation Pane** to quickly access specific folders.

To add the new folder to the Navigation Pane:

- 1. Click the **Shortcuts** button on the Navigation Pane (see Table 2).
- Select the File menu ► New ► Navigation Pane Shortcut.... The Add to Navigation Pane dialog box opens prompting for information about the item that the shortcut will be created for (see Figure 7).
- 3. Select the item to add to the shortcut list
 ► OK button.

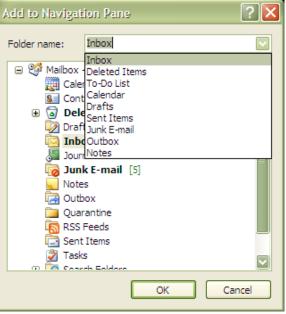


Figure 7 – Adding Items to the Navigation Pane

<u>NOTE</u>: As an example, select "Calendar" as the destination of the shortcut.

USING THE TOOLBARS

Toolbars provide shortcuts to menu commands. By default, the **Standard** toolbar appears in a folder or item window. Buttons on the **Standard** toolbar change depending on the feature that is in use. For example, when using the **Mail** folder, the **Standard** toolbar displays buttons such as the **Reply** and **Forward** buttons that are relevant to e-mail; when using the **Calendar** feature, the **Standard** toolbar displays buttons specific to scheduling.

The Standard Toolbar

Depending on the e-mail editor, other toolbars may be available when users are creating a message. Figure 8 shows the **Standard** toolbar for the *Mail* option.

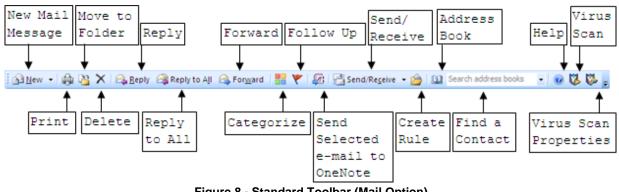


Figure 8 - Standard Toolbar (Mail Option)

To display or hide toolbars:

- 1. Select the <u>View menu</u> ► <u>Toolbars</u> (all available toolbars are listed in a submenu).
- 2. Click the toolbar to display or hide.

The Web Toolbar

The **Web** toolbar (see Figure 9) controls Internet access. Users can use Outlook to visit Web pages by entering the address (URL) of the Web page in the *Address* text box. Users may move back and forth between pages, search for pages on the Internet, and add Web pages regularly visited to the favorites list.



Figure 9 - Outlook Web Toolbar

To browse the Web from Outlook:

- 1. If the Web toolbar is not displayed, select the <u>View menu \triangleright <u>T</u>oolbars \triangleright Web.</u>
- Type the URL of the Web page to visit in the *Address* text box, e.g., <u>http://email.calstatela.edu</u> (to access **Outlook Web Access**). The page will be displayed in the information viewer.

Using Outlook E-mail Features

Outlook can serve as a universal inbox for all e-mails. Besides composing, sending, receiving, reading, and responding to messages, users can also use several advanced features such as attaching files (e.g., documents, spreadsheets, pictures, etc.), forwarding messages, and using auto-reply.

CHECKING E-MAIL MESSAGES

Check for new e-mail messages using either of the following methods:

- Click the **Send/Receive** button **Send/Receive** on the **Advanced** toolbar.
- Press the key combination [Ctrl + M].

Message indicators identify the status of a message in the *Inbox*. Some of the different message indicators are listed below in Table 3.

| Table 3 - Message | Indicators |
|-------------------|------------|
|-------------------|------------|

| Icon | Header |
|------|---------------------------------------|
| X | Unread Message |
| 0 | Message contains a file attachment |
| | Message has been read |
| 1 | High Level of Importance |
| 2 | Message has been Replied to |
| 2 | Message has been Forwarded |

READING E-MAIL MESSAGES

Received e-mail messages are collected in the *Inbox* folder. To read messages, open the *Inbox* folder and click a message to read its contents in the **Viewing Pane**. Double-clicking a message will open a separate, full-screen **Viewing Pane**.

E-mail Viewing Options

The *Inbox* folder shows the information for each message in various columns including information about the sender, subject, date, and time received. It is also possible to view the entire content of a message in a separate **Preview Pane** without actually opening the message. There are two viewing options: **Reading Pane** and **AutoPreview**. Both views are selected from the <u>View</u> menu. Outlook automatically displays the content of the currently selected message in the **Reading Pane**. **AutoPreview** displays the first three lines of every e-mail message directly below the message header, allowing users to scan items quickly.

<u>NOTE</u>: When selecting the **Reading Pane** option from the **View** menu, there are three options for where the **Reading Pane** can be placed in the **Outlook** window. Figure 10 illustrates the options.

| | <u>R</u> ight |
|--|----------------|
| | <u>B</u> ottom |
| | <u>O</u> ff |

Figure 10 - Reading Pane Placement Options

COMPOSING E-MAIL MESSAGES

Messages are composed and sent using a Message Form.

A Message Form can be opened with one of the following methods:

- 1. Click the **New** button 1. The **Message Form** opens (see Figure 11).
- 2. Enter the e-mail address(es) using the **To...** button **To...** and **Cc...** button **Cc...** (if necessary) to quickly access e-mail address(es) in your *Contacts* list. Users can also type the name or address of a recipient directly.
- 3. Type a title or subject for the message in the *Subject* text box.
- 4. Enter the message text in the main body of the Message Form.
- 5. Click the **Send** button **Send**.

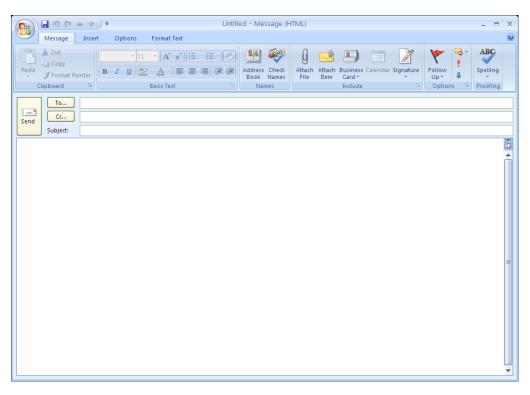


Figure 11 - New Message Window

Using the Carbon Copy (Cc) and Blind Carbon Copy (Bcc) Features

The *Cc...* feature enables users to send a carbon copy of a message to another recipient. The email address(es) entered in the *Bcc...* text box will not be displayed to any recipients to whom the message is sent. Multiple recipients in the *To...*, *Cc...*, or *Bcc...* text boxes must be separated with a semicolon [;].

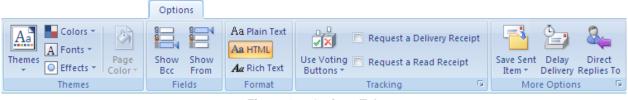


Figure 12 - Options Tab

To add blind carbon copy (*Bcc...*) recipients to a message:

- 1. Click the <u>New</u> button $\underbrace{\square \mathbb{N}^{ew}}$ to compose a new e-mail message.
- 2. Select the *Options* tab on the **Ribbon**.
- 3. Select the **Show Bcc** command in the *Fields* group (see Figure 12). A new text box named *Bcc...*, is added to the message.
- 4. Enter the address or addresses in the *Bcc...* text box.

E-mail Message Format

When composing a message, there are three ways the message can be formatted: HTML, Rich Text, and Plain Text. HTML will allow enhancement of e-mail messages with anything that can be placed into a **Word** document such as bulleted lists, background images, and borders. It is the default format used by Microsoft Exchange Server and Outlook. Most of the e-mail clients will be able to read this format. Rich Text is a format proprietary to Exchange so its use is not recommended because of compatibility issues. Plain Text format is the simplest and is guaranteed to be read by any e-mail client. To switch to Plain Text when composing an e-mail, click the appropriate button in the *Format* group of the *Options* tab on the **Ribbon** (see Figure 12).

Inserting Attachments to E-mail

Files created in other applications (e.g., **Microsoft Word** documents, **Excel** spreadsheets, **PowerPoint** presentations, or image files) can be sent along with e-mail messages. A file that is attached to a message is delivered with the message and can be opened by the recipient(s). Files sent with the messages are known as *file attachments*.

To attach a file to a message:

- 1. Compose a new message.
- 2. Select the *Insert* tab on the **Ribbon**.
- 3. Click the **Attach File** button in the *Include* group (see Figure 13). The *Insert File* dialog box opens.
- 4. Navigate to the drive and directory where the file is stored and select it.
- 5. Click the **Insert** button to attach the file to the message. Users can choose to attach the file as text only by selecting the option from the **Insert** drop-down arrow.

<u>NOTE</u>: Outlook disables many of the features that allow viruses to spread quickly. It blocks access to attachments that contain "*exe*" (executable files), as well as some other file types. Users cannot open these files from Outlook or save them to the local system. If users try to forward a message containing an "*exe*" file, Outlook will not include the attachment in the forwarded message.

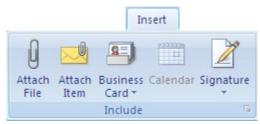


Figure 13 - Include Group on the Insert Tab

REPLYING TO AN E-MAIL MESSAGE

Users can reply to an e-mail message from the *Inbox* folder by selecting the message and clicking the selecting the respond to the sender, or by clicking the reply to All button to respond to all message recipients, including the sender.

When the user replies to a message, Outlook opens a *Message Form*. This form will automatically insert *RE*: in front of the original message subject in the <u>Subject</u> text box. The original message will be displayed in the *Message Body* text box with the insertion point above it. The original message and the response will be separated by a line with the response on top. When the response has been composed, clicking the <u>Send</u> button will transmit the response. Once the user replies to a message, a colored, left-pointing arrow appears attached to the envelope symbol next to the message

<u>NOTE</u>: The reply will be sent to the person who sent the latest message to the user. If the user selected the \bigcirc Reply to All option, the response will be sent to the originator, plus anyone who was listed in the *Cc*... or *Bcc*... text boxes.

FORWARDING AN E-MAIL MESSAGE

Users can forward messages to other recipients directly from the *Inbox* view or another folder if the message is not stored in the *Inbox* folder. Outlook opens a *Message Form* that includes all the information from the original message. Users can also add their own comments that will appear at the top of the message. The only difference between forwarding and replying to a message is that the user may have to click the **Address Book** button in the *Names* group on the *Message* tab of the **Ribbon**.

SAVING A MESSAGE

Users can save unsent/unfinished messages in the *Drafts* folder (see Figure 4) by clicking the **Save** button is on the **Quick Access Toolbar**. If the user clicks the send button without being connected to an e-mail service, Outlook will save the message in the *Outbox* folder. Outlook will automatically send the message(s) when a connection to an e-mail service is established.

Organizing Messages

The ability to organize messages is an important feature available in Outlook. Users who experience a high volume of e-mail message traffic will find these features particularly useful to sort and move large numbers of messages. Features such as importance, flagging, color coding, and rules are useful to maintain a system of organized messages.

SORTING MESSAGES

Messages can be sorted by clicking the column header that is desired as the sort criterion. The sort order can be switched between ascending and descending by clicking the column header again.

To sort messages:

- 1. Select the *Inbox* folder.
- Click the <u>View</u> menu ► <u>Arrange By</u>. A list of sorting views appears. Select a view (see Figure 14).

<u>NOTE</u>: By default Outlook sorts by <u>D</u>ate and Show in Groups (see Figure 14). Users can sort messages by ascending or descending dates by clicking the <u>Received</u> column header in the **View Pane**.

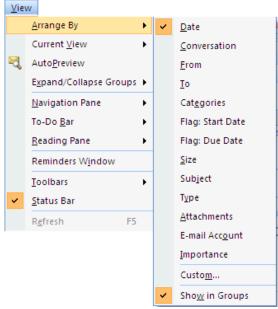


Figure 14 - Sort Options

ADDING NEW FOLDERS TO THE FOLDER LIST

Creating a new folder in the Folder List is another way to organize Outlook items.

To add new folders to the Folder List:

- 1. Click the <u>New</u> drop-down arrow on the **Standard** toolbar. A drop-down menu appears (see Figure 15).
- 2. Select the Folder... option. The Create New Folder dialog box opens (see Figure 16).
- 3. Enter the name of the new folder in the *Name:* text box.
- 4. Select the category of items the new folder will contain in the *Folder contains:* drop-down list.
- 5. Select the location for the folder in the *Select where to place the folder:* list box ► OK button.

| <u>1 62</u> | lew 👻 | |
|-------------|-----------------------------------|--------------|
| P | <u>M</u> ail Message | Ctrl+N |
| 2 | <u>P</u> ost in This Folder | Ctrl+Shift+S |
| | Fold <u>e</u> r | Ctrl+Shift+E |
| | Search Folder | Ctrl+Shift+P |
| | Na <u>v</u> igation Pane Shortcut | t |
| | <u>A</u> ppointment | Ctrl+Shift+A |
| | Meeting Re <u>q</u> uest | Ctrl+Shift+Q |
| 8= | <u>C</u> ontact | Ctrl+Shift+C |
| 88 | Distribution List | Ctrl+Shift+L |
| 2 | <u>T</u> ask | Ctrl+Shift+K |
| 2 | Task <u>R</u> equest | Ctrl+Shift+U |
| 5 | Journal Entry | Ctrl+Shift+J |
| | <u>N</u> ote | Ctrl+Shift+N |
| 3 | Internet Fa <u>x</u> | Ctrl+Shift+X |
| -8 | Ch <u>o</u> ose Form | |
| 9 | Choose InfoPath Form | Ctrl+Shift+T |
| | Outlook Data <u>F</u> ile | |

Figure 15 - New Drop-Down Menu



Figure 16 - Create New Folder Dialog Box

MESSAGE IMPORTANCE

Message importance is a useful feature for classifying e-mails according to priority. *Importance* labels draw the attention of the e-mail receiver in the **View Pane**. Messages can also be sorted by importance level by clicking the importance column heading . Every message is prioritized **Normal** by default.

To set message importance:

- 1. Right-click over the selected message and select **Options...** The *Message Options* dialog box opens (see Figure 17).
- 2. In the *Message settings* section, click the *Importance:* drop-down arrow and choose from the three levels of importance: *High*, *Normal*, and *Low*.
- 3. Click the **Close** button to close the dialog box. Outlook will ask if the user wants to save the changes to the message ► **Yes** button.

| Message Options | |
|--|---|
| Message settings — Importance Sensitivity: | Add digital signature to outgoing message |
| | |
| Contacts Categories 💌 | None |
| Internet headers: | Microsoft Mail Internet Headers Version 2.0 Received: from santafe8.academic.ad.calstatela.edu ([10.81.30.54]) by santafe1.academic.ad.calstatela.edu with Microsoft SMTPSVC(6.0.3790.3959); Mon, 24 Nov 2008 10:44:33 -0800 X-MimeOLE: Produced By Microsoft Exchange V6.5 Content-class: urn:content-classes:message Close |

Figure 17 - Message Options

FLAGGING MESSAGES

While *Importance* gives information to the recipient about the urgency of the e-mail, *Flagging* is a more elaborate way to classify e-mails into categories for the attention of both the sender and the receiver. It also serves as a means to instruct people pertinent to the message on how to follow up on the message.

A message can be flagged by right-clicking the message, selecting the **Follow Up** option, and then selecting from the menu (see Figure 18). The same options can also be accessed by opening the message and then clicking the **Follow Up** button in the *Options* group on the *Message* tab of the Ribbon.

<u>NOTE</u>: If the <u>Custom</u> option is selected, the *Custom* dialog box opens (see Figure 19). The *Custom* dialog box allows the user to select a specific date or range of dates for follow up and program a reminder that follow up is needed on the message. Clicking the **OK** button will close the dialog box.

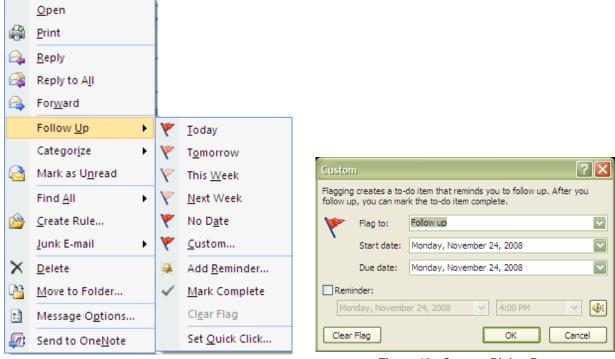


Figure 18 - Follow Up Menu

Figure 19 - Custom Dialog Box

Once a message has been flagged for follow up, a follow up header will appear at the top of the message when it is opened or it appears in the **Reading Pane** (see Figure 20 for an example). When or if follow up is no longer required for a message, the user can go to the **Follow Up** menu and select the Clear Flag option to remove the flag.

<u>NOTE</u>: The Clear Flag option will not appear in the menu unless a flag has already been set on the message.



Figure 20 - Follow Up Header

COLOR-CODING MESSAGES

If the user wants to further organize the messages, Outlook 2007 has the capability to automatically apply colors of choice to messages based on criteria.

To color-code the messages:

- 1. Select the **<u>T</u>ools** menu ► **Organize** command. The *Way to Organize Inbox* appears in the **View Pane**.
- 2. Click the **Using Colors** button.
- 3. Apply the desired coloring by clicking the corresponding drop-down arrows. For example, color-code the messages from "*jelly*" with the color "*Purple*" (see Figure 21).



4. Click the **Apply Color** button. All e-mails from "*jelly*" will now be highlighted in purple.

USING FOLDERS AND USING VIEWS

Besides **Using Colors**, users can also organize the *Inbox* by **Using Folders** and **Using Views**. The **Using Folders** option allows a user to move a message directly into a specific folder. For example, the user could move the current message to the "*trainme*" folder (Figure 22). If necessary, additional folders can be created by clicking the **New Folder...** button.



Figure 22 - Using Folders Feature

With Using Views, the user can change the way messages are viewed, or organize them based on specific criteria, such as "*By Sender*" or "*By Conversation Topic*" (see Figure 23). Clicking the **Customize Current View...** button will open the *Customize View: Message Timeline* dialog box where specific criteria can be chosen.

| Ways to Organ | ize Inbox | Customize Current View 🗙 |
|--|---|--------------------------|
| Using Folders Using Colors Using Views | Change your view: Messages Messages with AutoPreview Last Seven Days Unread Messages in This Folder Sent To Views only change the way your information looks. | |

Figure 23 - Using Views Feature

CREATING AN AUTOSIGNATURE

Users can automatically add a signature to each newly created message. The signature can include formatted text, graphics, e-mail addresses, and hyperlinks in the signature lines.

To create an *AutoSignature*:

- 1. Select the <u>**T**</u>ools menu \blacktriangleright Options.... The *Options* dialog box opens (Figure 24).
- 2. Select the *Mail Format* tab.
- 3. Click the Signatures... button. The *Signature and Stationary* dialog box opens (see Figure 26).
- 4. Click the <u>N</u>ew button. The *New Signature* dialog box opens (see Figure 25).

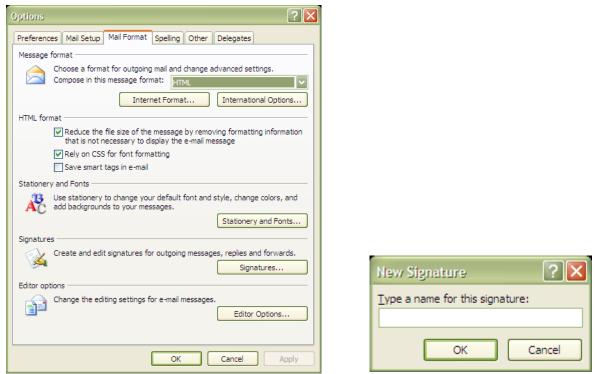


Figure 24 - Options Dialog Box with Mail Format Tab Selected

| Signatures and | Stationery | | | | | ? 🔀 |
|--|------------------|--------------|-----------|----------------------------|-------------------------|--------|
| E-mail Signature | Personal Station | ery | | | | |
| Sele <u>c</u> t signature t | o edit | | | - Choose default signa | ature | |
| MySignature | | | ~ | E-mail <u>a</u> ccount: | @cslanet.calstatela.edu | |
| | | | | New <u>m</u> essages: | MySignature | |
| | | | | Replies/ <u>f</u> orwards: | (none) | |
| Delete | New | C Saus | Densus |] | | |
| | New | <u>S</u> ave | Rename | J | | |
| Edi <u>t</u> signature Calibri (Body) | | | Automatic | | | 0 |
| | V 11 V | BIU | Automatic | | Business Card | |
| Jethro Bodir | ne | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | ОК | Cancel |

Figure 26 - Signatures and Stationery Dialog Box

- 5. Enter the name of the signature \triangleright **OK** button.
- 6. In the *Edit signature* section of the *Signatures and Stationary* dialog box, enter the signature as it should appear in the e-mails ► **OK** button ► **OK** button.

Figure 25 - New Signature Dialog Box

Setting or Changing the Default Signature

Once a signature has been created, it can be modified.

To set or change the default signature:

- 1. Select the **Tools** Menu ► **Options...** ► *Mail Format* tab ► **Signatures...** button.
- 2. Select the signature in the Select signature to edit.
- 3. Select the signature to use/edit.
- 4. Make the changes in the Edit signature section \blacktriangleright OK button \blacktriangleright OK button.

Using the Address Book

The Outlook *Address Book* is a resource for storing contact information. It also provides a view into the *Contacts* folder. The Outlook *Address Book* provides contact information for an individual or organization. The *Contacts* folder is more detailed in nature and provides details besides notification information.

The *Address Book* is used to look up and select names, e-mail addresses, and distribution lists when addressing messages. When typing a name in the *To*, *Cc*, or *Bcc* text boxes of an e-mail message, **Outlook** automatically checks to see if the typed name matches a name in the *Address Book* before a message is sent. If **Outlook** finds an exact match, the name appears underlined. If more than one match is found, the names appear with a red, wavy underline. Users may then right-click on the name to display detailed information for each of the matches. Users can also use the **Check Names** button in the *Names* group on the *Message* tab of the **Ribbon** to manually check the names in an untitled *Message Form*.

Click the **Contacts** button **Contacts** on the **Navigation Pane** to view the **Contacts**.

To use the Address Book when composing a message:

- 1. Click the New button. A new *Message Form* opens
- 2. Click the **Address Book** button in the **Names** group on the Message tab of the Ribbon. The *Select Names* dialog box opens (see Figure 27).
- 3. Select which address book to use in the Address Book drop-down list.
- 4. Type the last name of the user who will receive the message in the Go text box.
- 5. If the name exists in the address book, it will automatically be highlighted.
- 6. Click the type of addressee button for the recipient (**To**, **Cc**, or **Bcc**) ► **OK** button.

| Select Names: Global | Address List | | | × |
|---|----------------|---------------------|---------------|---------------|
| Search: Name only | O More columns | Address Book | | |
| | Go | Global Address List | \checkmark | Advanced Find |
| Name | Title | | Business Phon | e Locatio |
| 💈 OHamady, Bernard Eu | ugene | | | |
| 8 Aalund, Scott 8 Aaron, Diomi | | | | |
| 🧟 Aasi, Junaid | | | | |
| S Abacan, Joan S Abad, AnnaMonique | | | | |
| 8 Abad, Iliana | | | | |
| 8 Abad, Joanne 8 Abad, Maria Corazon | 5 | | | |
| & Abad, Maria Corazon | 5 | | | |
| 8 Abadir, Mary | |) | | |
| | | | | |
| To -> | | | | |
| Cc -> | | | | |
| Bcc -> | | | | |
| | | | ОК | Cancel |

Figure 27 - Outlook Address Book

TYPES OF ADDRESS BOOKS

Two types of address books can be displayed in the Select Names dialog box.

The *Outlook Address Book* is created automatically and contains the contacts in the *Contacts* folder. The *Contacts* folder can be used to store and retrieve a variety of information, such as street addresses, phone numbers, e-mail addresses, fax numbers, and Web page addresses. When updating a contact, the *Outlook Address Book* is updated as well.

The *Global Address List* is a feature of the Microsoft Exchange Server that contains all user and distribution list e-mail addresses in the organization. The administrator creates and maintains this address book. It can also contain public folder e-mail addresses.

CREATING A NEW CONTACT ENTRY

The *Contact* form (see Figure 28) is used to create a new contact entry. It can be accessed by opening the *New* drop-down menu and selecting Contact (see Figure 15).

The *Contact* dialog box includes a variety of fields that can store information about a contact. After adding the appropriate information, click the **Save & Close** button to add or update the contact information.

| | | Untitl | ed - Contact | | | - = X |
|---|-----------------|-------------------|--------------|---|----------------------------------|----------------------|
| Contact Ins | ert Format Text | | | | | ۲ |
| Save & New * | General Details | E-mail Meeting Ca | 🛷 Мар | Business Picture Categorize Card Options | Follow Spelling Cor Up - & No | ntact tes Note |
| Full Name Company: Job title: File as: Internet | | | | 2 | | |
| Display as: | | | Notes | + | | |
| Web page address: | | | | | | |
| IM address: | | | | | | |
| Phone numbers | | | | | | |
| Home | | | | | | |
| | | | | | | |
| | | | | | | |
| Addresses | | | | | | |
| Business This is the mailing address | | | | | | = |
| | | | | | | • |

Figure 28 - New Contact Dialog Box

DELETING A CONTACT

A contact can be easily removed from the list.

To delete a contact:

- 1. Select **Contacts** on the Navigation Pane.
- 2. Select the contact to delete.
- 3. Press the **[Delete]** key or click the **Delete** button **X** on the **Standard** toolbar.

CREATING A DISTRIBUTION LIST

A distribution list is a collection of names and addresses. Users can use a distribution list to quickly address a message to a group of recipients (see Figure 29).

To create a distribution list:

- 1. Select Distribution List from the *New* drop-down menu (see Figure 15). The Distribution List form opens (see Figure 29).
- 2. Enter a name for the distribution list in the *Name:* text box.
- 3. Click the **Select Members** button in the *Members* group of the *Distribution List* tab on the **Ribbon**. The *Select Members* dialog box appears (see Figure 30).
- 4. Select the address book to use in the *Address Book* drop-down menu.
- 5. Search for a member by typing their last name in the *Search*: text box.
- 6. When the name is found, click the Members -> button to add them to the list queue.

- 7. When all members have been placed in the queue, click the **OK** button to add them to the list and close the *Select Members* dialog box.
- 8. Click the **Save & Close** button in the *Actions* group on the *Distribution List* tab of the **Ribbon** to create and close the *Distribution List* form

| Distribution List Insert Format Text | 0 |
|---|---------|
| Save & X Delete Members Notes Select Add Remove Update Lemail Meeting Categorize Follow Private Spelling | |
| Save & X Delete Members Notes Select Add Remove Update L-mail Meeting Categorize Follow Private Spelling Turner Up * Up * | |
| | |
| | |
| Name: | |
| Name E-mail There are no items to show in this view. | |
| there are no nells to show in this new. | |
| | |
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| | - |

Figure 29 – Creating a Distribution List

| Select Members: Glob | al Address List | | | |
|---|-----------------|---------------------|---------------|---------------|
| Search: Name only | O More columns | Address Book | | |
| | Go | Global Address List | \checkmark | Advanced Find |
| Name | Title | | Business Phor | ne Locatio |
| S OHamady, Bernard Eu | ugene | | | |
| Aalund, Scott Aaron, Diomi | | | | |
| 8 Aasi, Junaid 8 Abacan, Joan | | | | |
| & Abad, AnnaMonique | | | | |
| 8 Abad, Iliana 8 Abad, Joanne | | | | |
| 8 Abad, Maria Corazon | S | | | |
| Abad, Venice Abadir, Mary | | | | |
| 💈 abadisian, nina | | | | |
| Abajian, Sharie Abajuo, Chioma | | | | |
| 0 Ahakar Yusuf | III | | | |
| Members -> | | | | |
| | | | OK | Cancel |

Figure 30 - Select Members Dialog Box

Using the Out of Office Assistant

This feature is useful for a period of time when users are out of the office (for example, during a vacation), and they want to let people know that they are not available to read the delivered messages.

To configure an automatic reply using the Out of Office Assistant:

- 1. Click the Mail button on the Navigation Pane.
- 3. Click the *I am currently Out of the Office* option button.
- 4. Type the message that will be sent while out of the office in the *AutoReply only once to each sender with the following text:* text box ► OK button.

| Out of Office Assistant | |
|--|--|
| ◯ I am currently In the Office | |
| ○ I am currently Out of the Office - | |
| AutoReply only once to each sender v | with the following text: |
| I will be out of the office from Decem | ber 22 until January 4. |
| These subscriptions and the incoming | |
| Status Conditions | n messages while you are out of the office: Actions |
| | Move Up Move Down |
| Add Rule Edit Rule Delet | e Rule Show rules for all profiles |
| | OK Cancel |

Figure 31 - Out of Office Assistant Dialog Box

Exiting Outlook

Users can exit Outlook by clicking the **Close** button \times on the title bar. An alternative method for closing Outlook is to select the **<u>File</u>** menu \triangleright **<u>Exit</u>**; this will close the program.

What is Outlook Web Access and what are its requirements?

Outlook Web Access (OWA) is a separate web-based component of the Microsoft Exchange Server. OWA allows users to access their mail through any system that has access to the World Wide Web. Although it does not contain the same features as the desktop version, it can be an alternative to accessing the mailbox for users at a workstation that does not have Outlook loaded.

The URL (Uniform Resource Locator) for OWA depends on the server:

• http://email.calstatela.edu/

For help or assistance using Outlook Web Access, handouts are available at:

• http://www.calstatela.edu/handouts

Information Security Tips

For more on Information Security, visit:

- User Guidelines for E-mail Communications: <u>http://www.calstatela.edu/its/policies/ITS-1000-</u> G_EmailCommunications.pdf
- Information Security Tips: http://www.calstatela.edu/its/itsecurity/tips