

Response-Line

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Outlook User's Manual

7/03



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Outlook Overview:

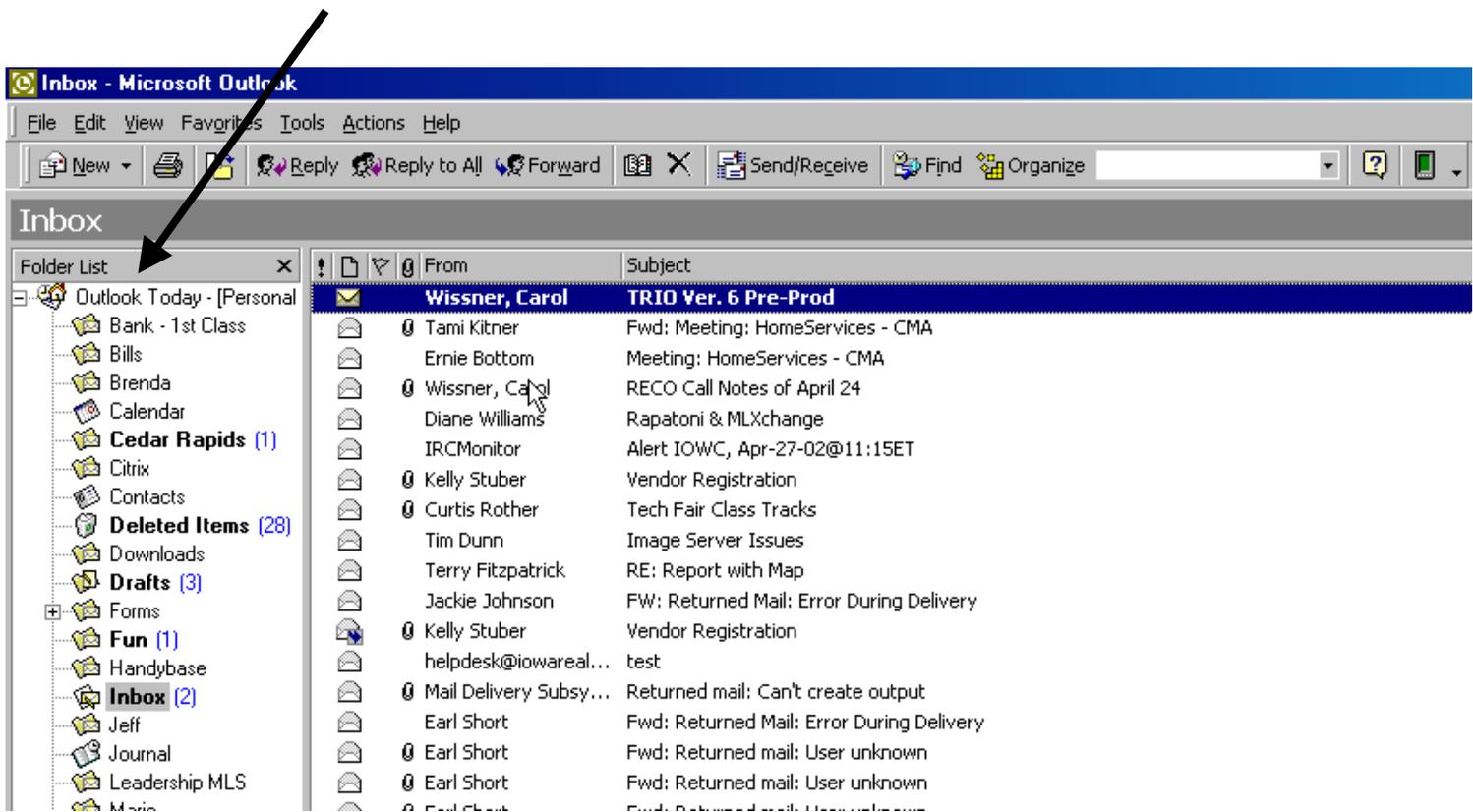
Welcome to *MS Outlook*. *Outlook* is a desktop information manager designed to assist you in sending and managing electronic mail, tracking contacts, as well as scheduling and managing appointments, meetings, events, and tasks.

Because *Outlook* is a product of *Microsoft*, it follows all the conventions of the other *Microsoft* products. Most of the screens are organized and look like the other *Microsoft* applications you have been using.

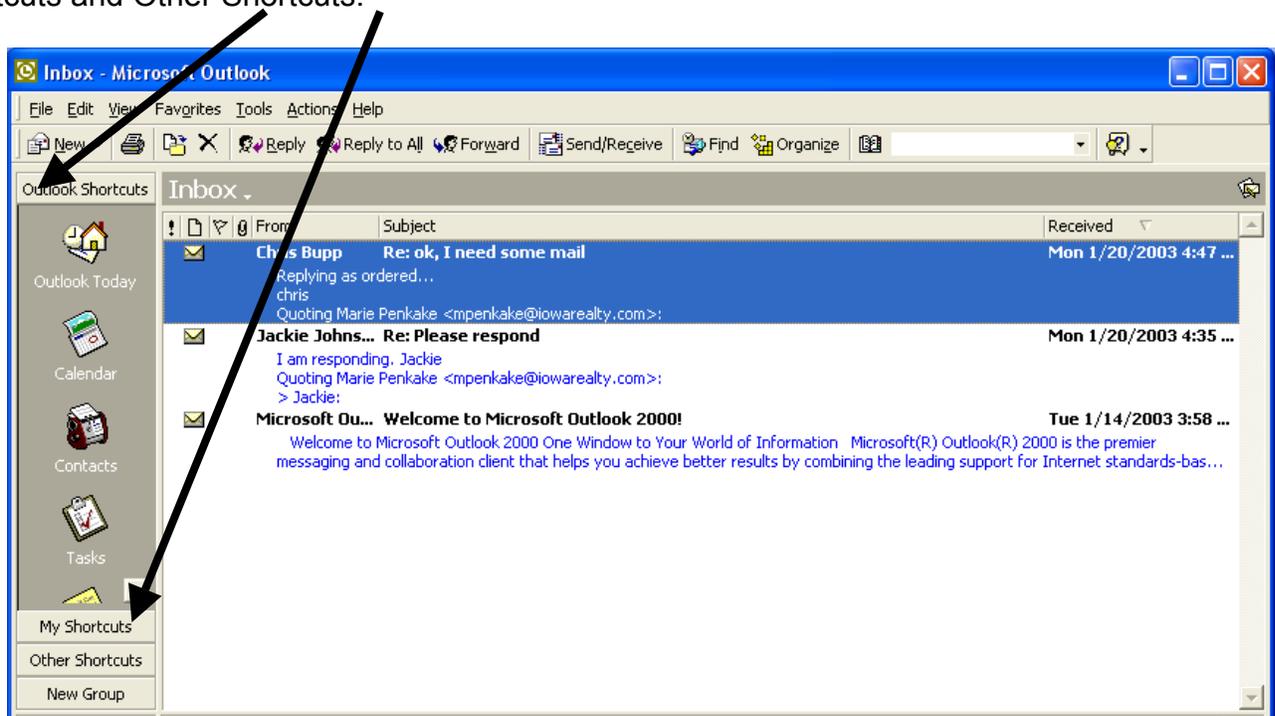
Standard Features:

In *Outlook*, information is organized into folders.

In the **FOLDER VIEW**, you see all of your folders at once in the Folder List.



In the **OUTLOOK BAR VIEW**, your folders are separated into sections, Outlook Shortcuts, My Shortcuts and Other Shortcuts.



The **folders** listed in the *Outlook* shortcuts provide quick access to any of the folders. These include:

Inbox –

Create, send, forward and reply to email messages
Organize messages

Calendar –

Create appointments
Plan meetings or events
Review tasks

Contacts –

Create, store, and gain access to names, addresses and other contact information

Tasks –

Create and manage *To Do/Tasks* items
Assign tasks to yourself or others in teams, departments, or organizations

Deleted Items –

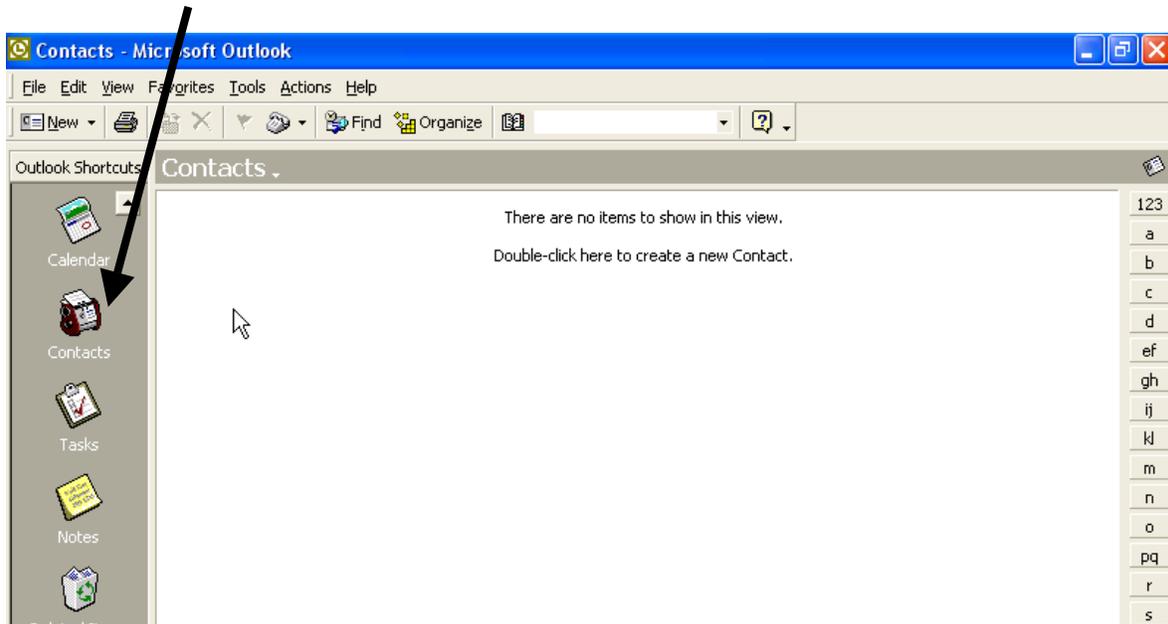
Manage all deleted items

Contacts:

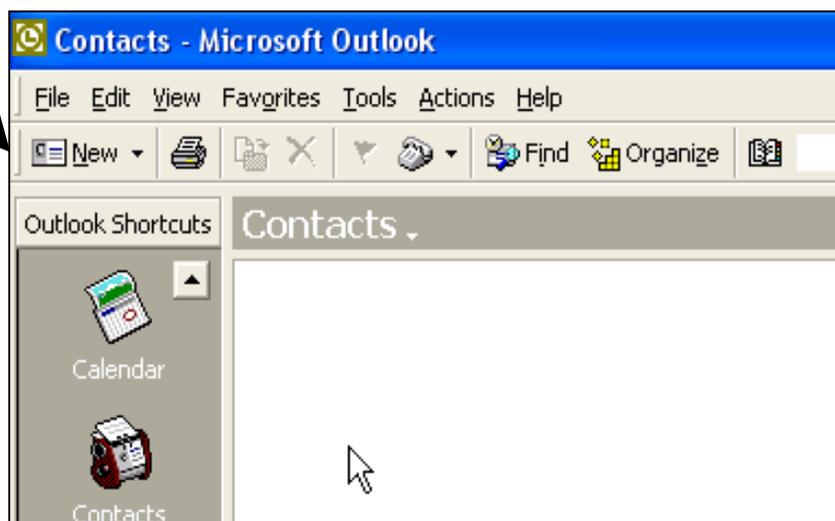
Outlook gets email addresses from the Contacts folder. Besides email addresses, you can keep street addresses, web page addresses, and phone numbers of all types. Basically, the information contained in Contacts can be quickly accessed for keeping in touch with your client base.

Adding Contacts:

1. Click on the **Contacts** icon or folder.



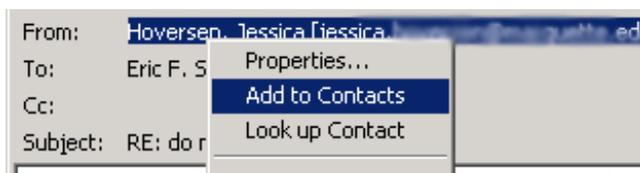
2. Click on the **New Contact** icon.



Or

a. **Create a contact from an e-mail message you receive**

1. Open the e-mail message that contains the name you want to add to your contact list.
2. In the **From** field, right-click the name you want to make into a contact, and then click **Add to Contacts** on the shortcut menu.

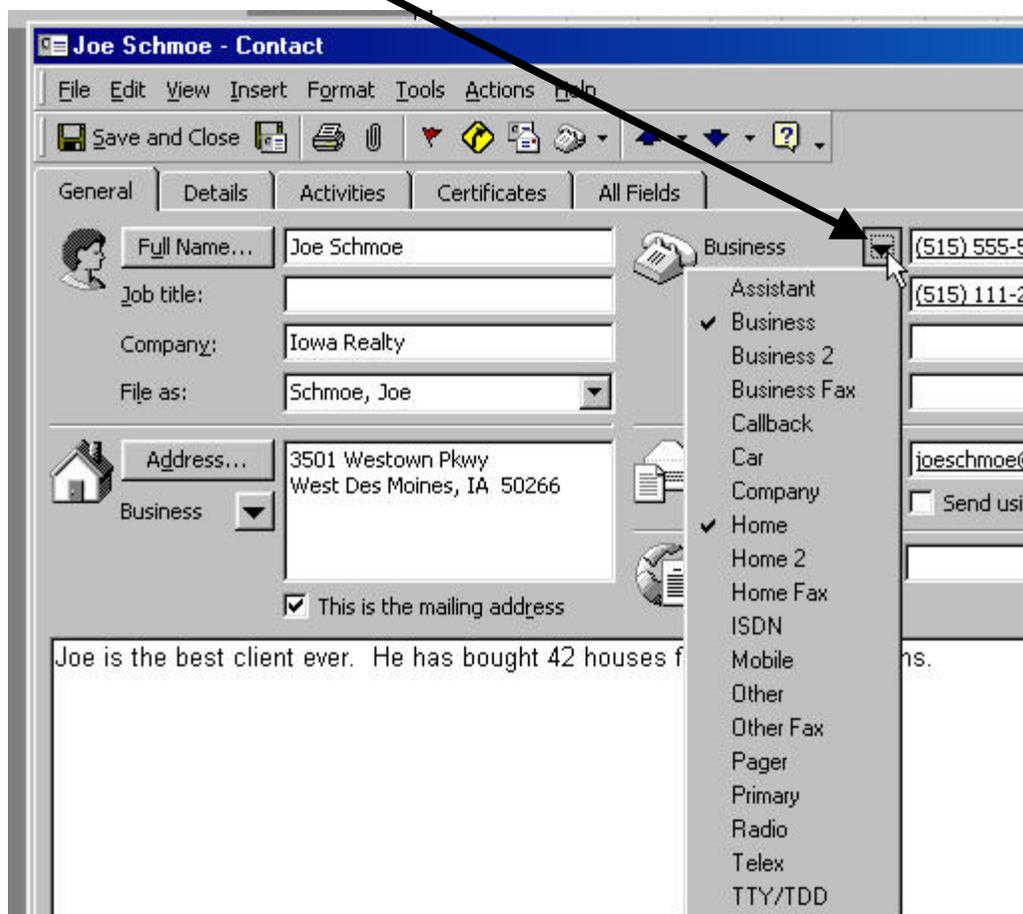


3. Complete all the pertinent fields and all the other fields in the contact screen. Remember, the more information you enter, the greater the future value.

 A screenshot of the 'Joe Schmoe - Contact' window in Outlook. The window title is 'Joe Schmoe - Contact'. The menu bar includes 'File', 'Edit', 'View', 'Insert', 'Format', 'Tools', 'Actions', and 'Help'. The toolbar contains icons for 'Save and Close', 'Print', 'Delete', 'Add', 'Remove', 'Refresh', and 'Help'. The 'General' tab is selected, showing fields for 'Full Name...' (Joe Schmoe), 'Job title:', 'Company:' (Iowa Realty), 'File as:' (Schmoe, Joe), 'Business' phone number ((515) 555-5555), 'Home' phone number ((515) 111-2222), 'Business Fax:', 'Mobile:', 'Address...' (3501 Westown Pkwy, West Des Moines, IA 50266), 'E-mail' (joeschmoe@iowarealty.com), and 'Web page address:'. A checkbox 'This is the mailing address' is checked. A large text area contains the note: 'Joe is the best client ever. He has bought 42 houses from me in 12 months.' At the bottom, there are 'Contacts...' and 'Categories...' buttons, and a 'Private' checkbox. A black arrow points from the 'Save and Close' button in the toolbar to the 'Save and Close' button in the bottom left corner of the window.

4. Click Save and Close.

An **arrow** or **drop-down arrow** indicates there are selections that you can use to save you time and provide consistency in data.



Note: You may enter up to three **E-mail addresses** for each contact. The format for this will be the **name** followed by the **@** sign followed by the **host.domain**

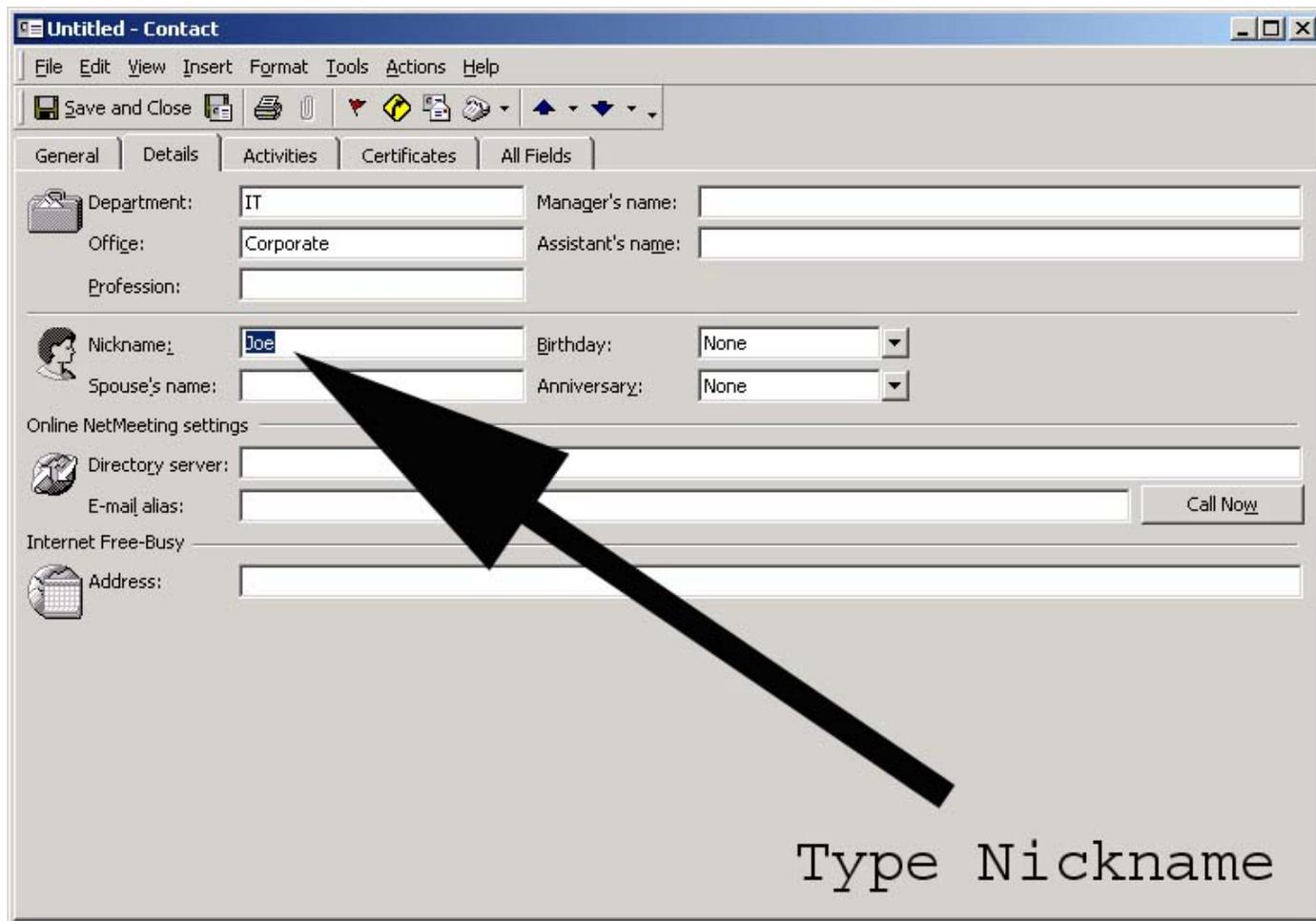
An example of an email address would be: **joeschmoe@iowarealty.com** or **jerryjones@firstrealtyhomes.com**.

Adding A Nickname

You may also add a nickname for your contact. Nicknames are a convenient way to organize and address your emails.

To add a nickname:

1. In the **Contact View** screen select the **Details** tab.
2. In the **Nickname** field type the contact's **Nickname**



The screenshot shows the Outlook 'Contact View' window for an 'Untitled - Contact'. The 'Details' tab is selected. The 'Nickname' field is highlighted with a large black arrow pointing to it, and the text 'Joe' is entered. Below the arrow, the text 'Type Nickname' is written in a monospaced font. Other fields include Department (IT), Office (Corporate), Manager's name, Assistant's name, Profession, Spouse's name, Anniversary, Birthday, Online NetMeeting settings, Directory server, E-mail alias, and Internet Free-Busy Address.

Department:	IT	Manager's name:	
Office:	Corporate	Assistant's name:	
Profession:			
Nickname:	Joe	Birthday:	None
Spouse's name:		Anniversary:	None
Directory server:			
E-mail alias:		Call Now	
Internet Free-Busy Address:			

Viewing Your Contacts:

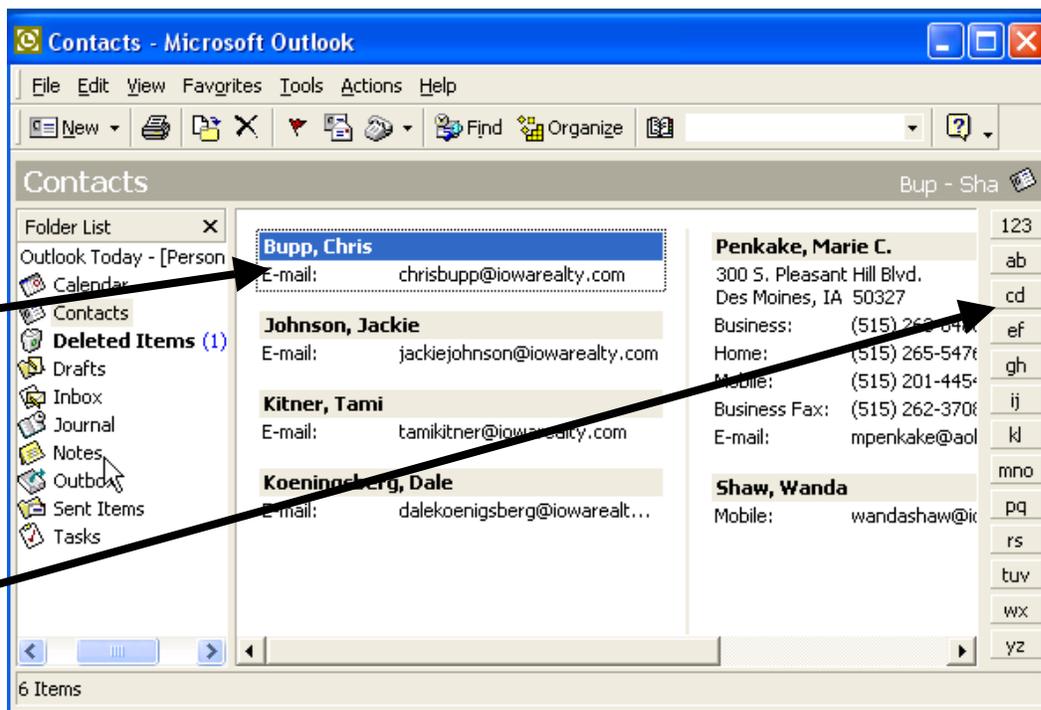
Your Contacts list can get very long, so *Outlook* offers a number of different ways to find and view contact(s).

This is the default view:

1. Customers are listed *alphabetically* by **last name** you can scroll through the list

OR

2. Use the **Quick search buttons** to jump-scroll in the list



Creating a Group:

When you regularly send emails to the same group of people, you can create a “group” to save time and ensure accuracy of email addresses. A contact must exist prior to becoming a member of a group.

If you wanted to email all of the CRS’s in your office, you can create a group and email them all at once.

In a message, recipients see their names *and* the names of all other recipients on the **To...** line of the message.

NOTE: In *Outlook 2000*, groups are referred to as **Distribution Lists**.

To create a Distribution List:

From the Contacts folder:

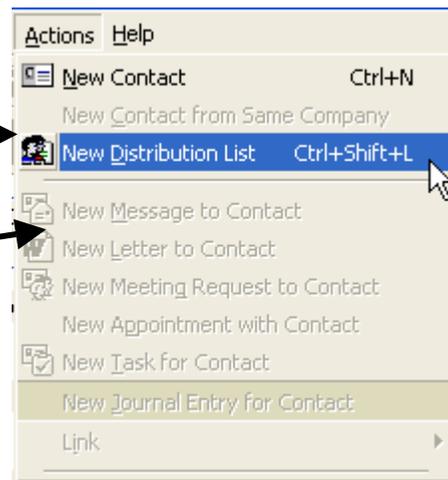
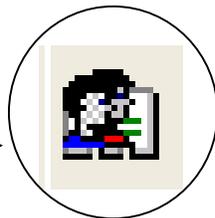
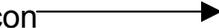
1. Click **Actions**



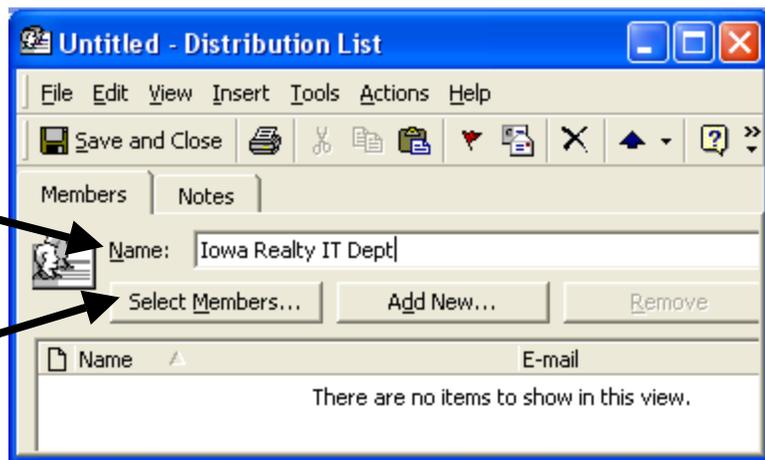
2. Click **New Distribution List**



This is the
Distribution List icon



5. Enter a **List name** in the *Name* box. You will want to name it so you can remember who is in the group.



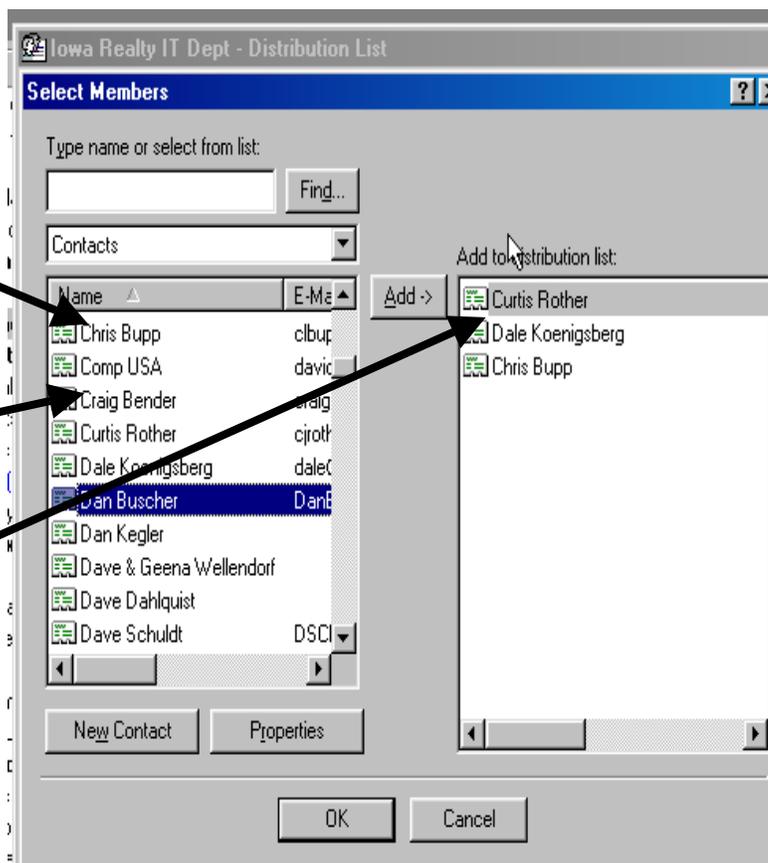
6. Choose **Select Members...** button

7. Click on a contact name and choose **Add->**

NOTE: This just adds Members to the list; you can still email them individually.

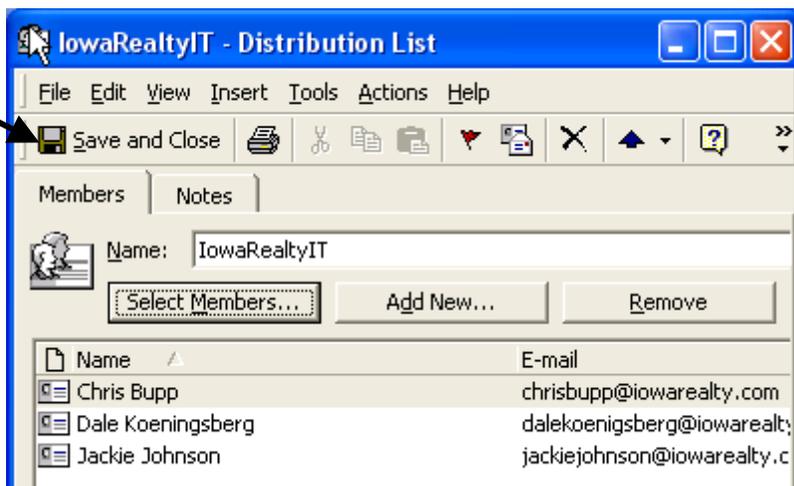
* The list on the left is the list you can choose from for your Distribution List.

* The list on the right is the people that are in your Distribution List.



8. When you have added everyone to the list, click **OK**.

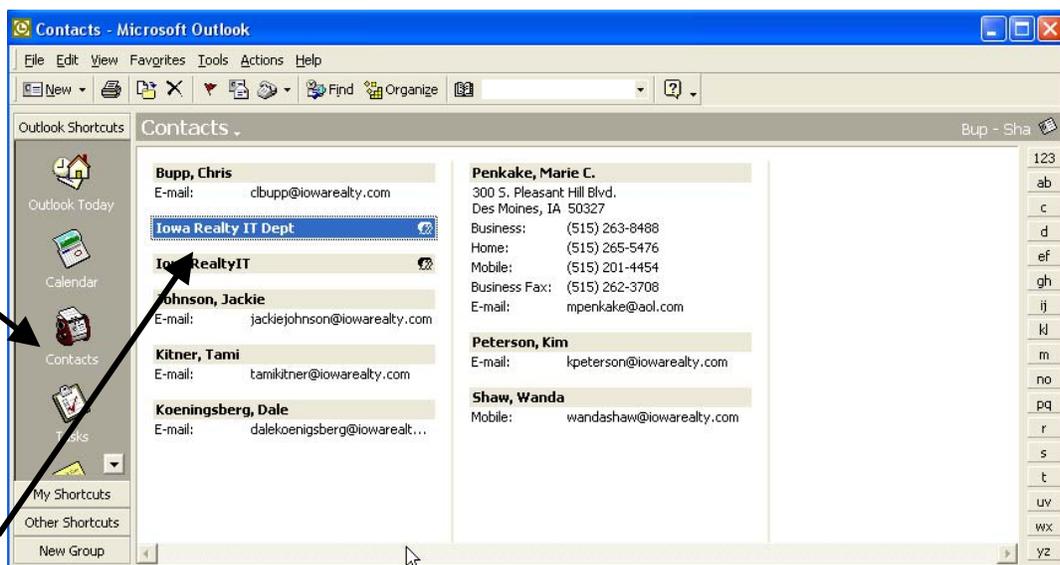
9. Click **Save and Close**



To Add/Edit/Delete Members On A Distribution List:

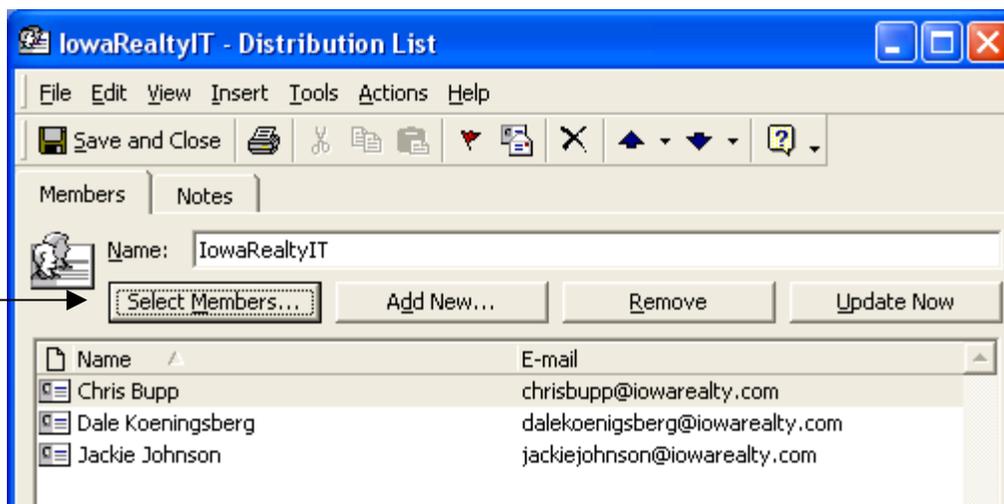
Once a distribution list is created, it is easily updated to reflect changes in the group. To update an existing list:

1. Click the **Contacts** icon or folder



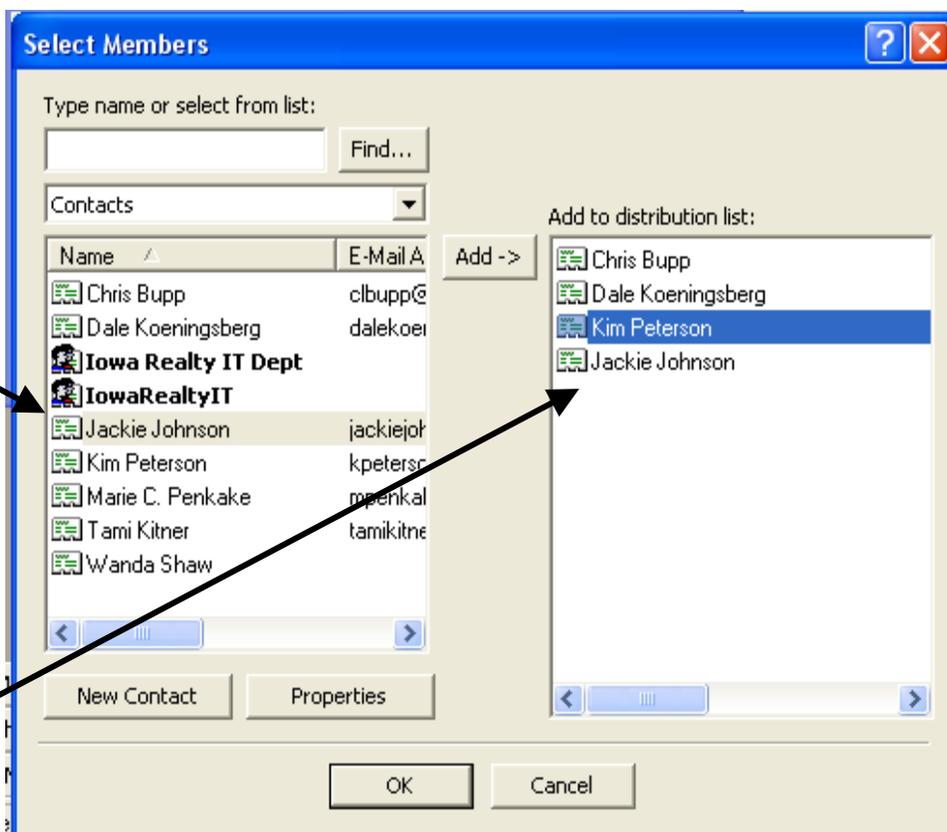
2. Double click the **Distribution List**

3. Click on **Select Members...** button



To ADD a member:

4a. Double click on the member name in the **left window**, it will move them to the list on the **right**.



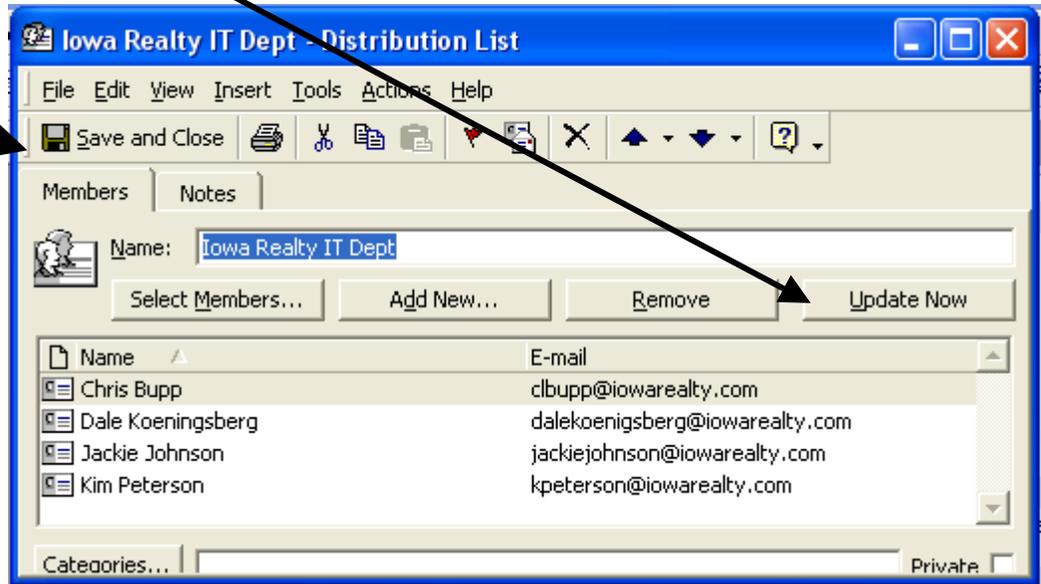
To DELETE a member:

4b. Double click on the member name in the **right window**, this will move it to the list on the **left**.

5. Click **OK**.

6. Click **Update Now**

7. Click **Save and Close**

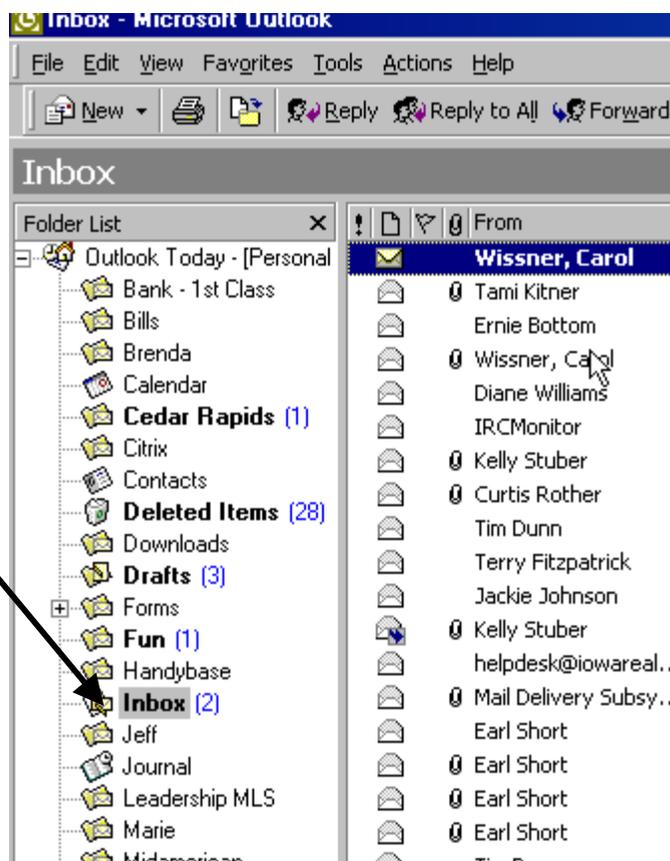


Email

This section provides a basic overview of using the *Outlook* email functions. It explains the processes of addressing the email, and replying and forwarding messages.

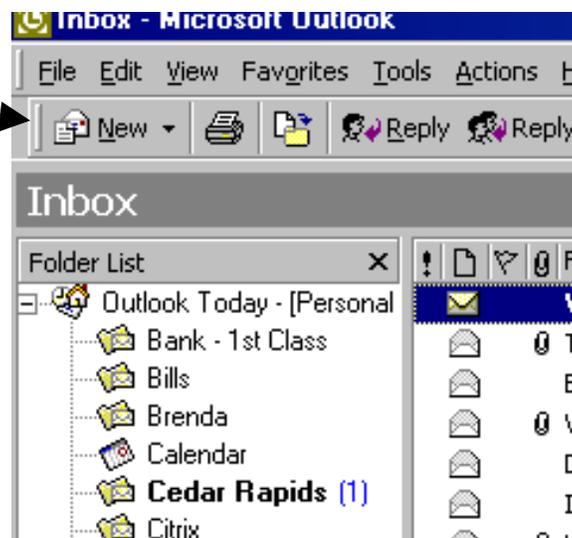
Inbox

1. Make sure **Inbox** is highlighted in your list of folders or icons.



To Compose a Message or Send an Email

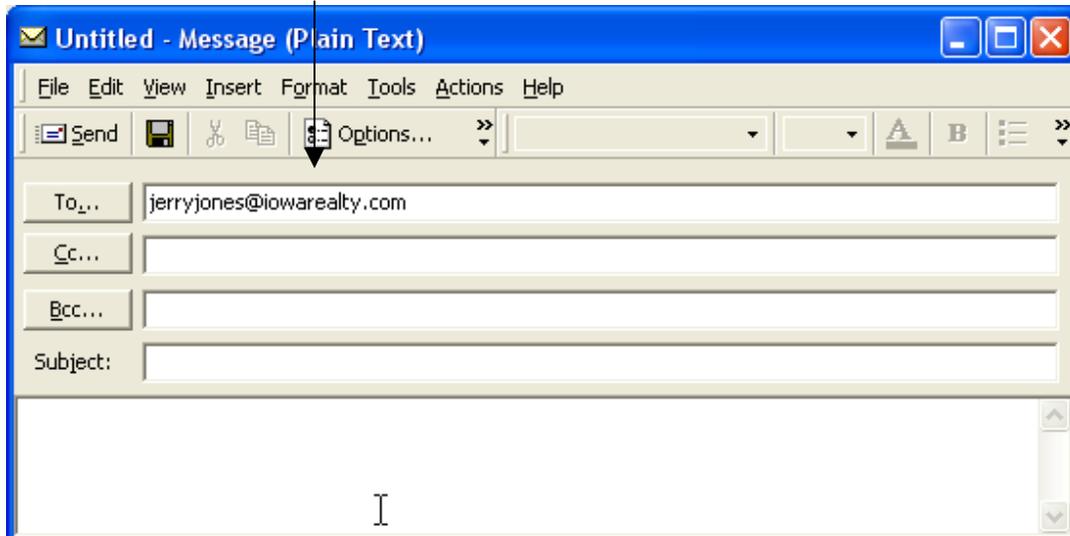
1. Click the **New** button at the top left of your toolbars.



3. Enter the email address:

There are a number of ways to enter the email address in the **To...** or **Cc...** fields.

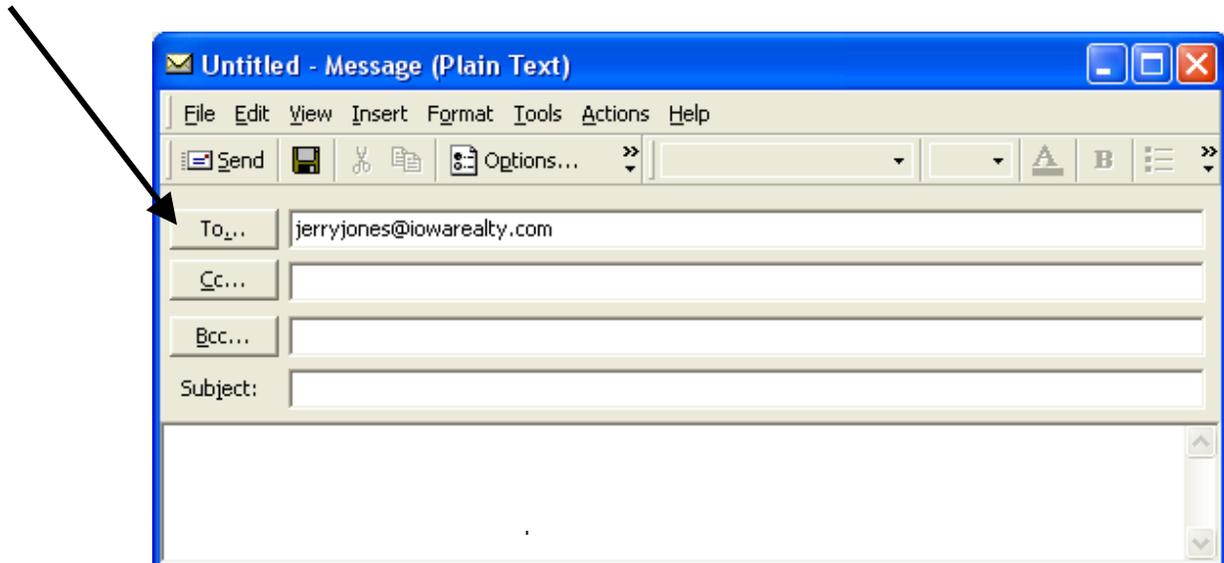
- A. Type the full email address
ex: jerryjones@iowarealty.com



OR

- B. Type the **Nickname** in the **To:** box.
Ex: Joe

- C. Click the **To...** box



4. Click on the name you want to email and click the appropriate buttons...

To->

or

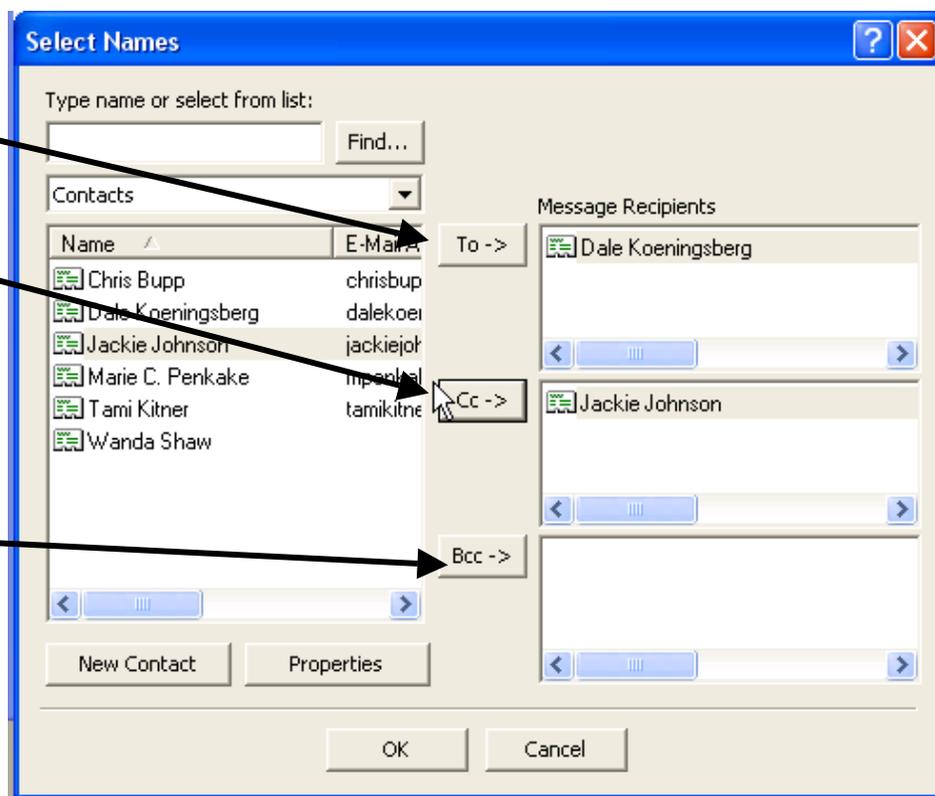
Cc->

NOTE: CC means “Courtesy Copy” or “Carbon Copy” and is used to keep someone in the loop of the discussion.

or

the **Bcc->** address box.

NOTE: Bcc means “Blind Courtesy Copy” or “Blind Carbon Copy” and is sent covertly—no one who gets the message knows who got blind copies.



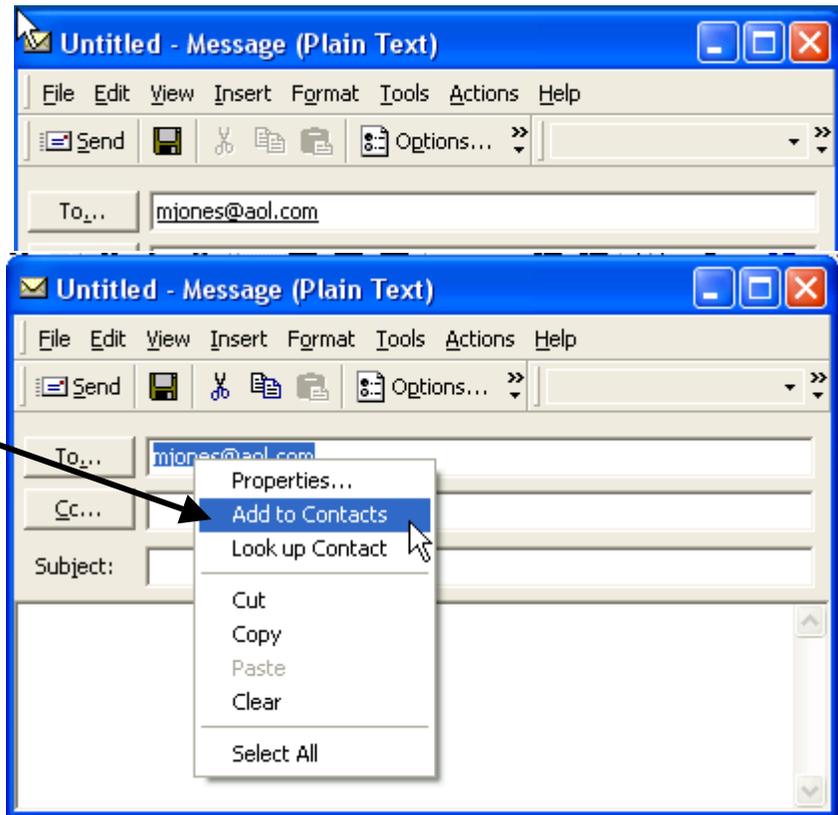
5. Click **OK**.

OR

Add a contact after typing in the email address

1. After you type the email address, hot the Tab key on your keyboard.

2. Right-click the address and, from the menu options, click **Add To Contacts**.



3. Enter the contact information.

4. Click **Save and Close**



Once an address has been entered, complete the email by entering the subject and message.

Enter Your Message Text:

1. Enter a brief description of your message in the Subject area. The Subject information can be seen in a summary of the recipient's Inbox providing information on the topic as well as the urgency of the message.

NOTE: Research indicates that messages with no subject are typically read last.

2. Enter the body of the message.

Customize Your Inbox

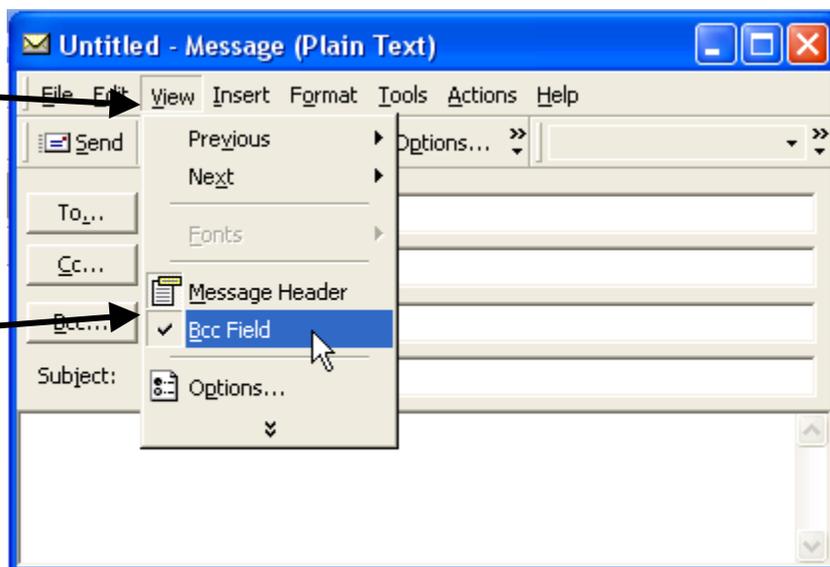
There are several options for customizing your **Inbox**. Most are beyond the scope of this manual. However, there are some that may be important for you to add or change.

1. Adding Bcc: Field

If you do not see a **Bcc:** field and find it necessary to add this, open a new message:

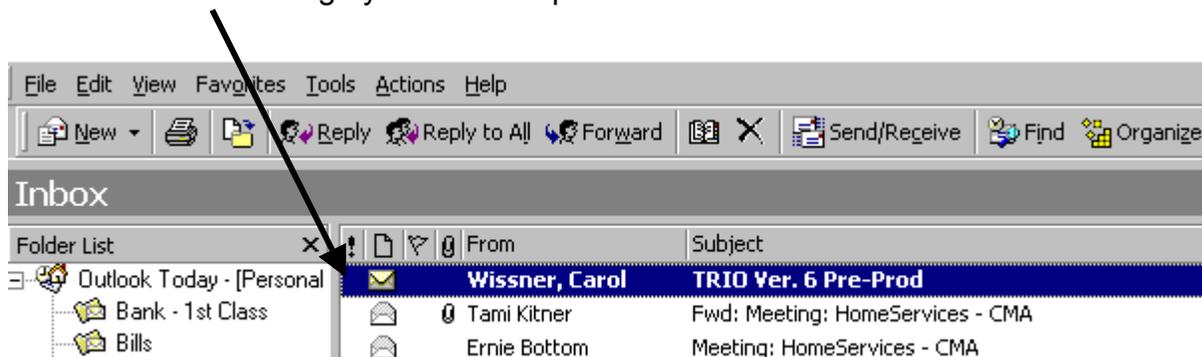
2. Click on **View**

3. Click on "**Bcc Field**":



To Read A Message

1. Double click on the message you want to open.

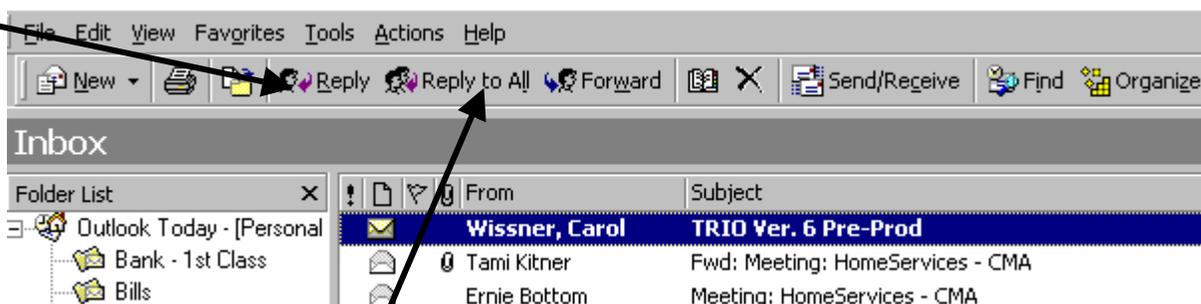


Reply and Forward A Message

Most of the messages you receive will typically need a reply and some will need to be shared with someone else. **Replying** and **Forwarding** are even easier than creating a new message.

To Reply to a message:

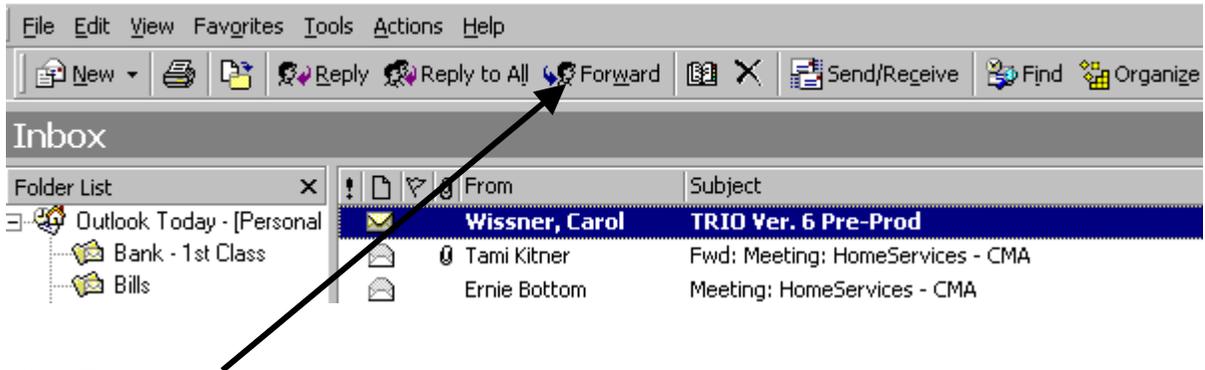
1. Open the message you want to Reply to.
2. To reply to only the sender of the message, click **Reply**.



NOTE: To reply to all of the recipients in the [To](#) and [Cc](#) boxes, click **Reply to All**

To Forward A Message:

1. Select the message you want to forward



2. Click **Forward**
3. Enter recipient names in the **To...**, **Cc...** and **Bcc...** fields
 - a. To select recipient names from a list, click the **To**, **Cc**, or **Bcc** button.
4. Click **Send**

Note: You can Forward multiple messages at once, if you select all of them first, then click on Forward.

Attaching A Document To Your Email Message

One of the advantages of using email is the fast and efficient transfer of full documents. Attaching documents in *Outlook* is very easy.

1. Create and save the document you wish to send to others. (REMEMBER where you saved it.)

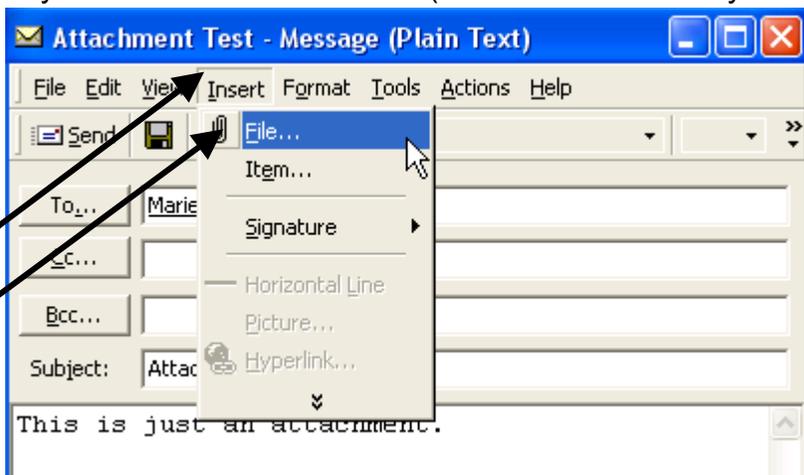
2. Create the email

Attach The Document

From the New Message window

3. Choose **Insert**.

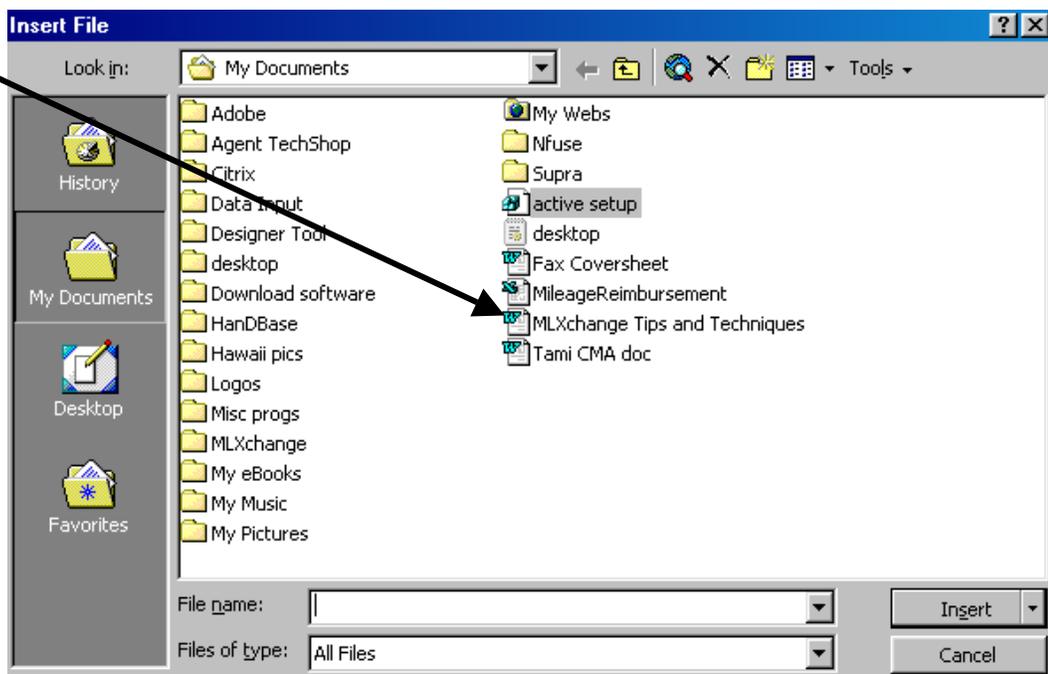
4. Choose **File**.

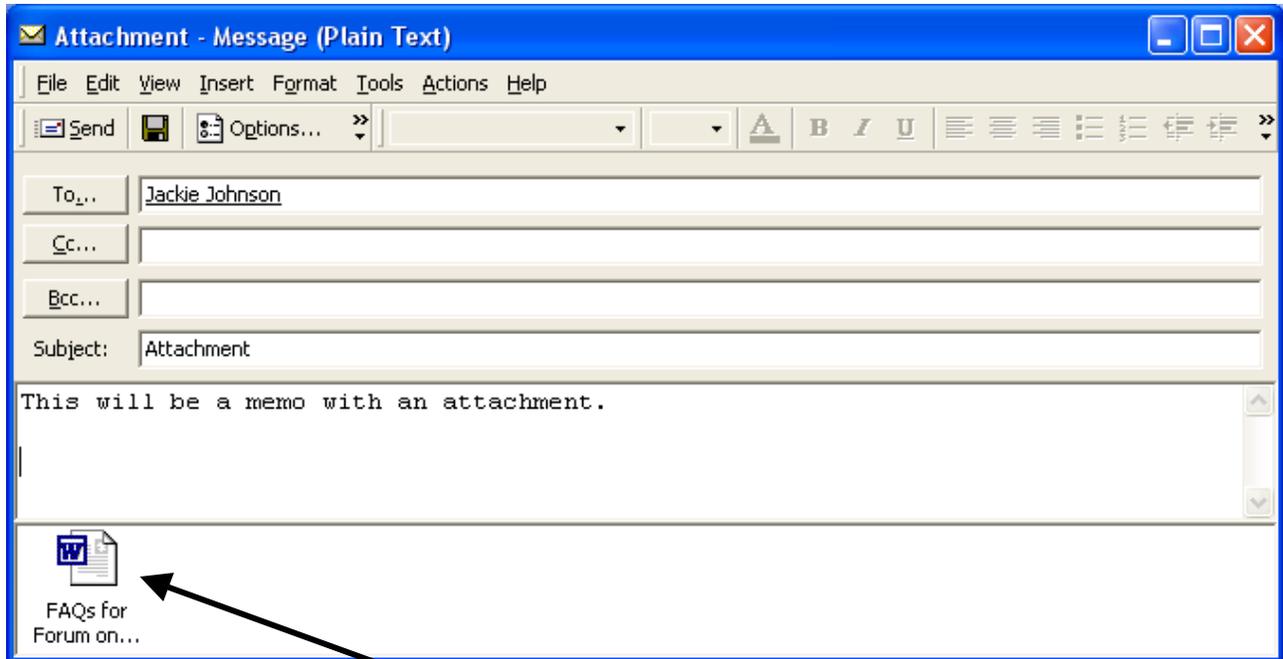


Now,

5. Navigate to the file you want to

6. Double-Click on the **file**.





When you have attached a document, an **icon** will display at the bottom of the memo.

NOTE: You can attach several documents to the same memo. However, a large number/size of the documents may cause the transfer of the memo to be slow or not be sent at all.

Managing Your Email

Managing your email boxes, **Inbox** and **Sent Items**, is critical for both your organization of responses as well as the server space.

Right click your mouse on any email.

The options available will be displayed in the pop-up menu.

Flag for Follow Up...

will assign an icon to the side of the message as a visual reminder to follow up on the message.

If you do not even wish to read the email, you may mark it a "**Mark as Read**" without ever opening it up.

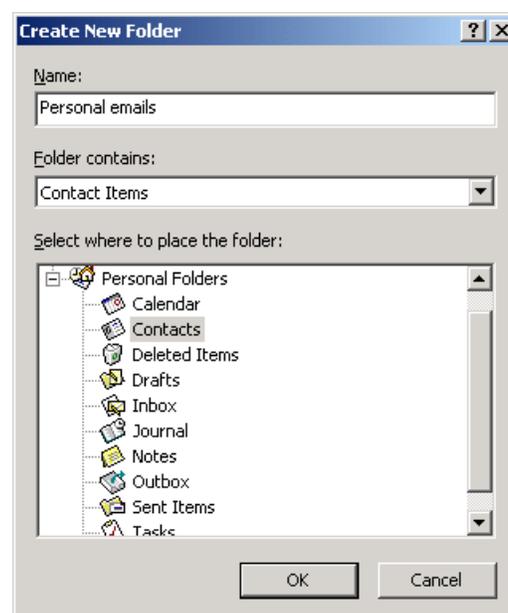
If you choose to delete the memo, choose **Delete**.



NOTE: When you delete a memo, it will reside in the **Deleted Items** folder until you remove it permanently from the **Deleted Items** folder. This allows you the option of moving the memo back to its original location. However, it is highly recommended that you empty the **Deleted Items** folder at the end of each day.

Organize Your Email in Folders

1. On the **File** menu, point to **New**, and then click **Folder**.
2. In the **Name** box, enter a name for the folder.
3. In the **Folder contains** box, click the type of [items](#) you want the folder to contain- for example **Emails** or **Contacts**.



4. In the **Select where to place the folder** list, click the location for the folder.
5. You may now drag and drop emails or contacts into the folders. This can be useful for archiving old messages.

Adding a Signature to Your Email

A Signature is text that you specify that will be added to each and every outgoing email. This is an excellent way to avoid having to sign your name and contact information when sending an email.

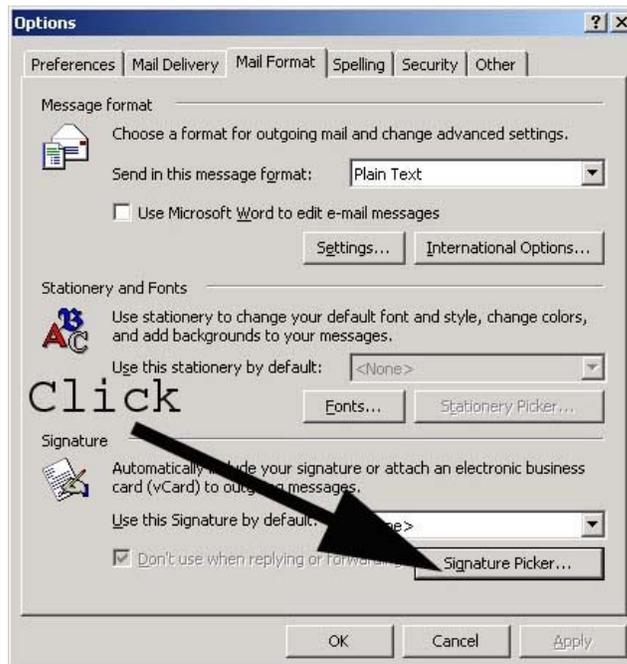
1. On the **Tools** menu, click **Options**, and then click the **Mail Format** tab.
2. Click **Signature Picker**, and then click **New**.

In the **Enter a name for your new Signature** box, enter a name.

3. Under **Choose how to create your Signature**, select whether to start from scratch or use an existing signature.



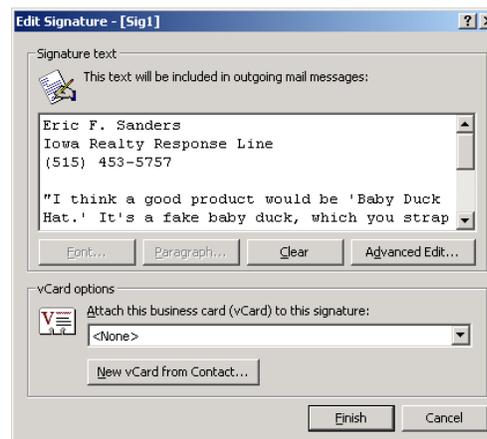
To select a file to base your signature on, click **Use this file as a template** and type the path and file name in the box, or click **Browse** to select from a list.



4. Click **Next**.
5. In the **Signature text** box, type the text you want to include in the signature.

You can also paste text to the **Signature text** box from another document.

6. To change the paragraph or font format, select the text, click **Font** or **Paragraph**, and then select the options you want. These options are not available if you use plain text as your message format.



Quick Sheet Summary For Email

Creating a New email:

1. On the **File** menu, point to **New**, and then click **Mail Message**
2. Enter recipient names in the [To, Cc, and Bcc boxes](#)
 - a. To select recipient names from a list, click the **To**, **Cc**, or **Bcc** button
3. In the **Subject** box, type the subject of the message
4. In the text box, type the message
5. Click **Send**

Reply To A Message

1. Open the message you want to reply to
2. To reply to only the sender of the message, click **Reply**

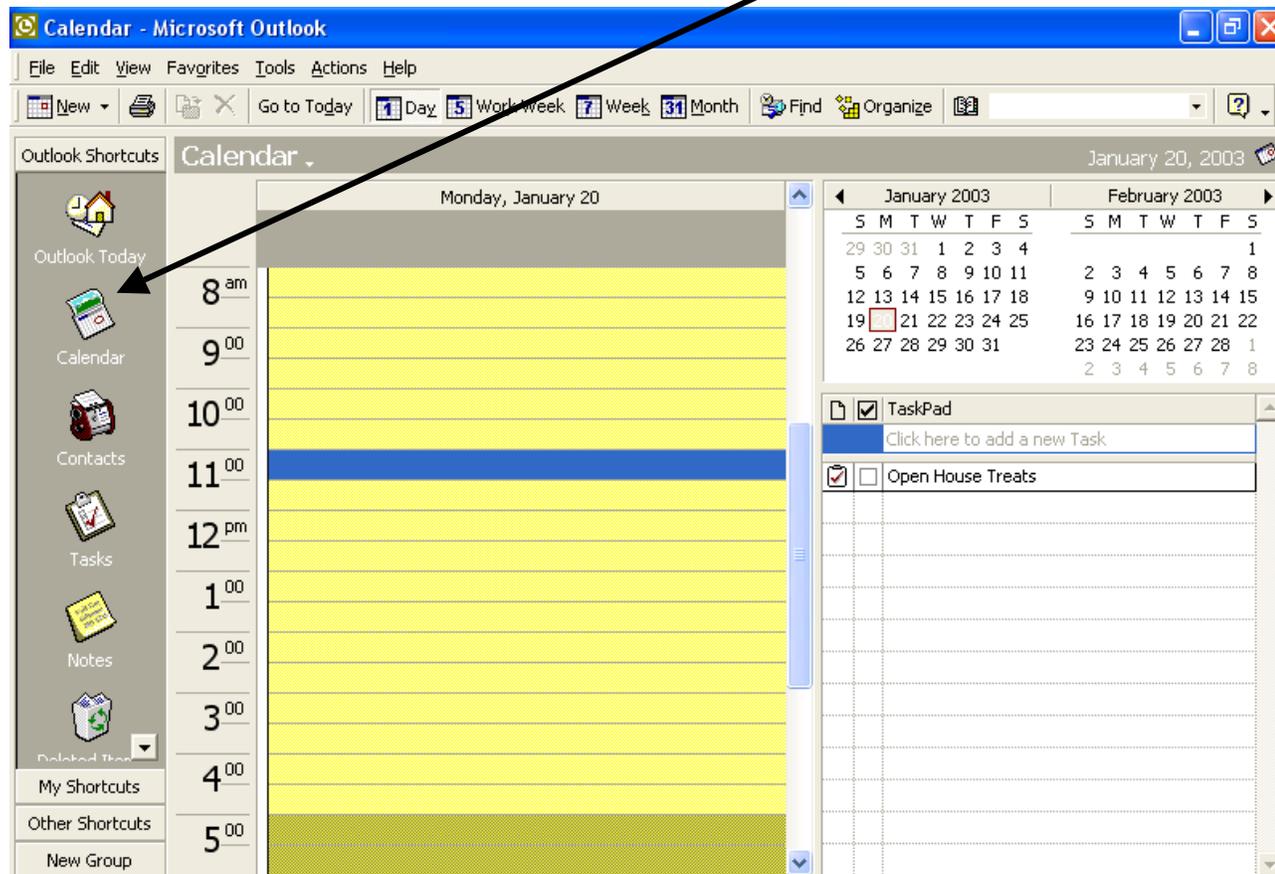
NOTE: To reply to all of the recipients in the **To...**, **Bcc...**, and **Cc** boxes, click **Reply to All**

Forward A Message

1. Click **Inbox**
2. Select the messages you want to forward
3. Click **Forward**
4. Enter recipient names in the To, Cc, and Bcc boxes
 - a. To select recipient names from a list, click the **To**, **Cc**, or **Bcc** button
5. If you are forwarding multiple messages, type the subject of the message in the **Subject** box
6. Click **Send**

Calendar

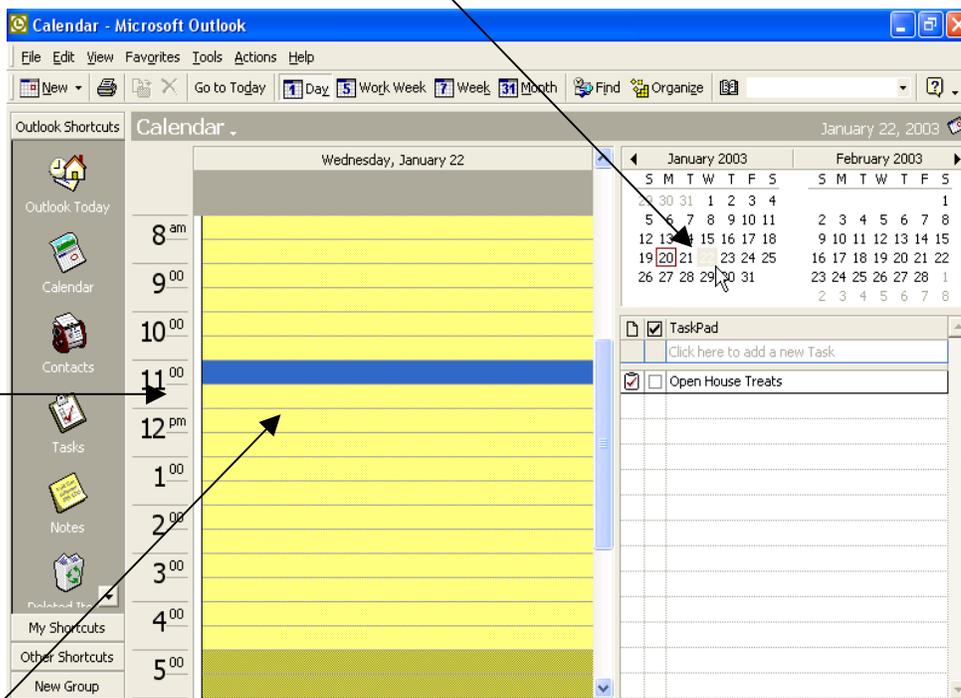
Outlook has a powerful calendar feature that allows you to track your schedule, attach memos, insert contacts and view your list of tasks. Click on the **Calendar** icon or Folder.



Set An Appointment

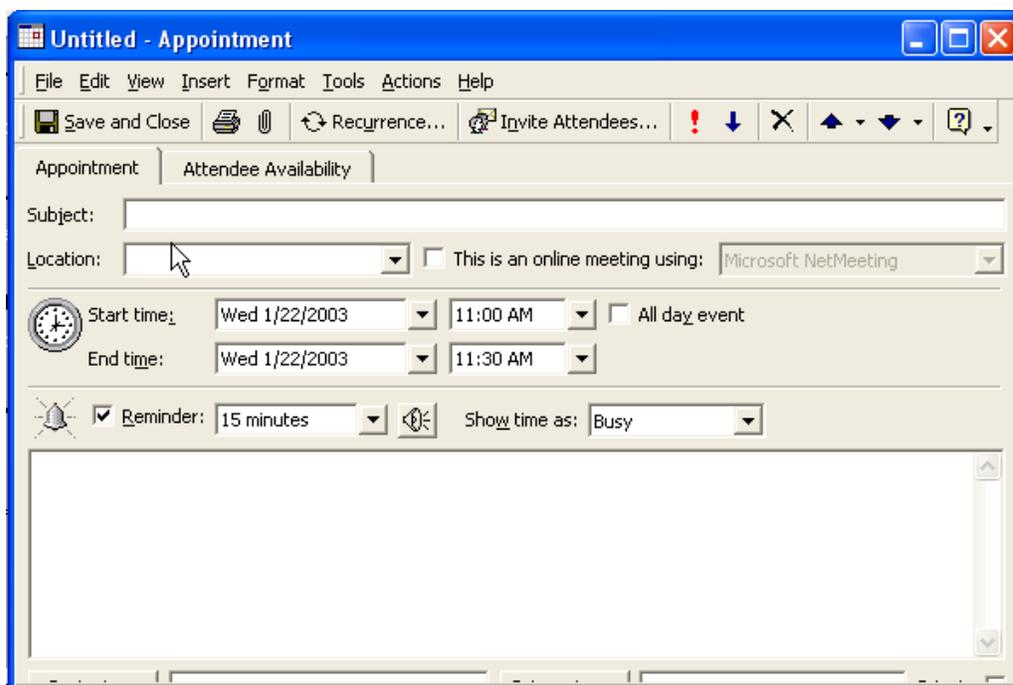
Outlook provides visual cues in setting appointments. This allows you to choose the month, date and time on the same screen.

To set an appointment, go to the **month** and **date** on the **calendar**



1. Choose the **time** by clicking on the line to the right of the time on the calendar.

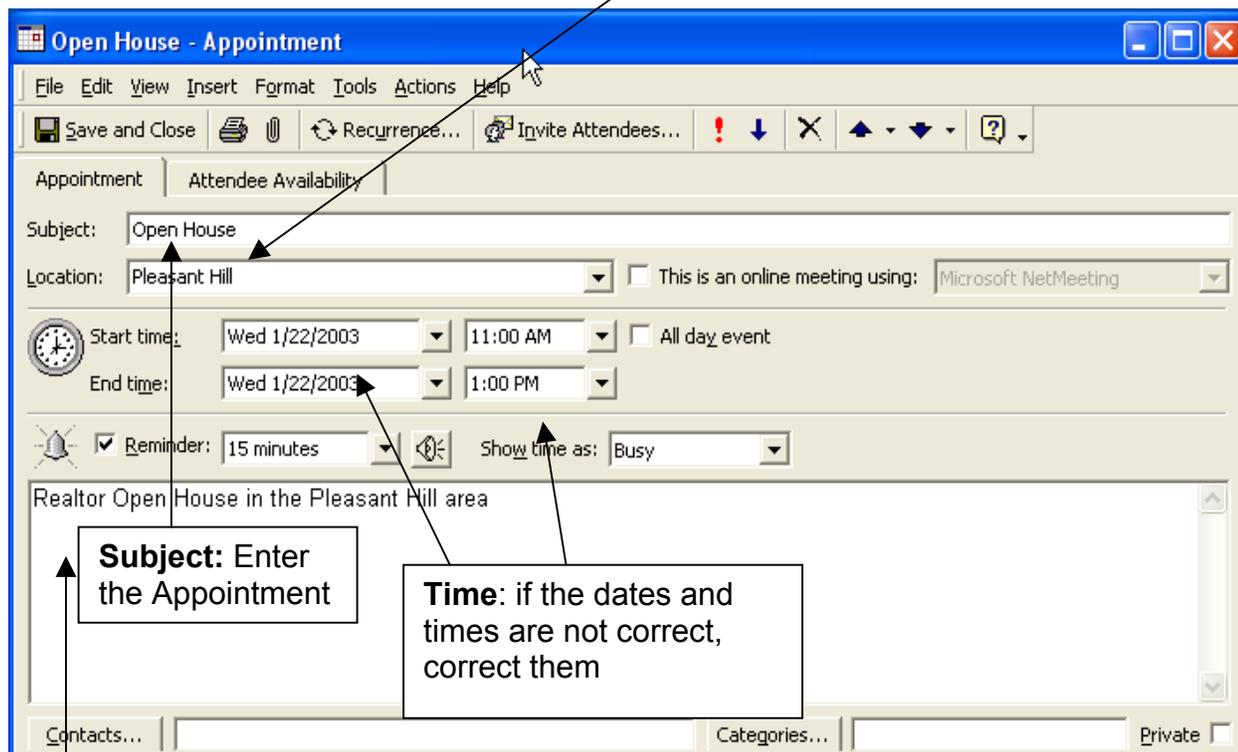
2. Double click on the **blue line** to get the **Appointment Screen** →



The Appointment Screen

This screen allows you set/adjust the date/time, add attendees (from Contacts), provide a subject line and enter a description of the meeting.

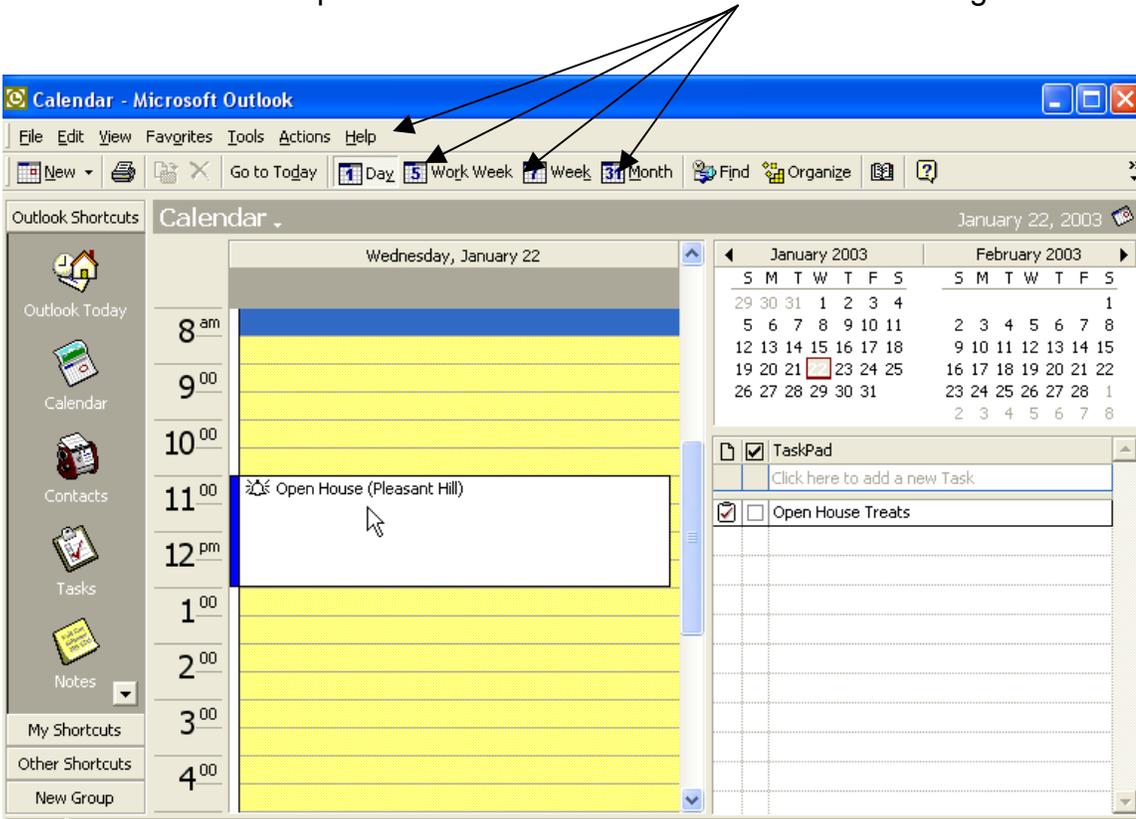
An invaluable aspect of it is the opportunity to set the **location** of the meeting in addition to all the other components.



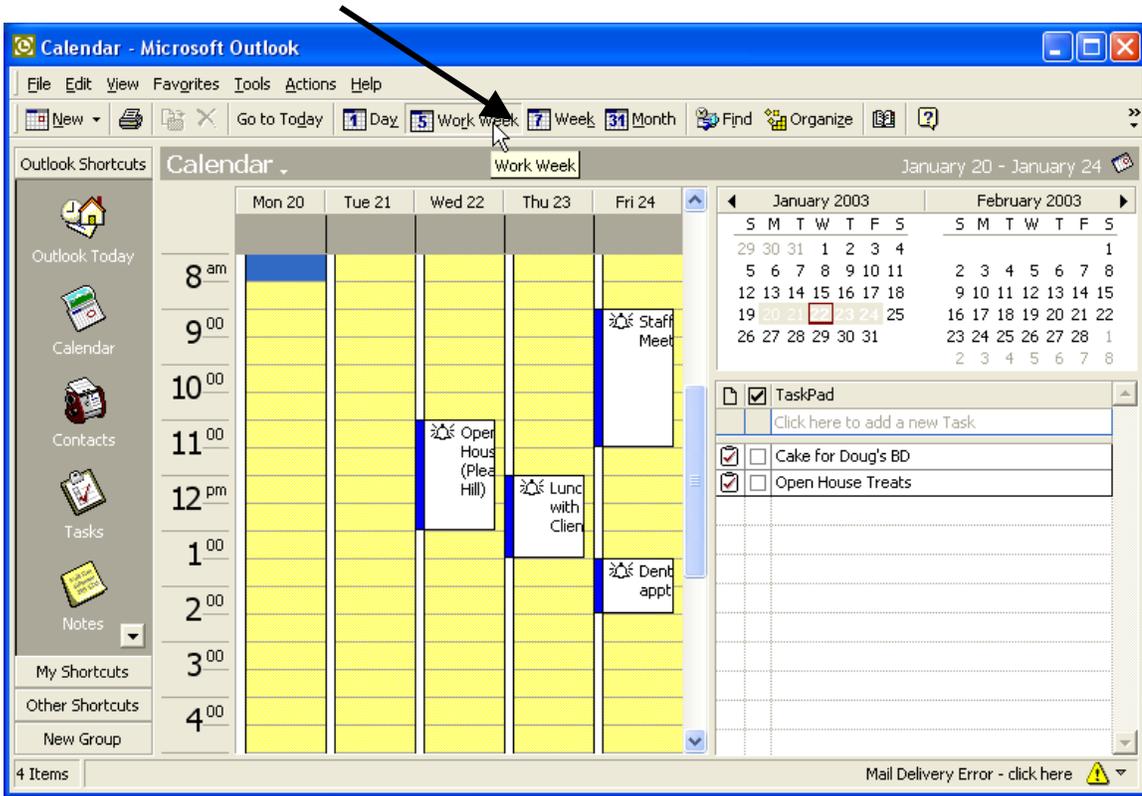
Memo: Enter the notes associated with the meeting

Calendar Views

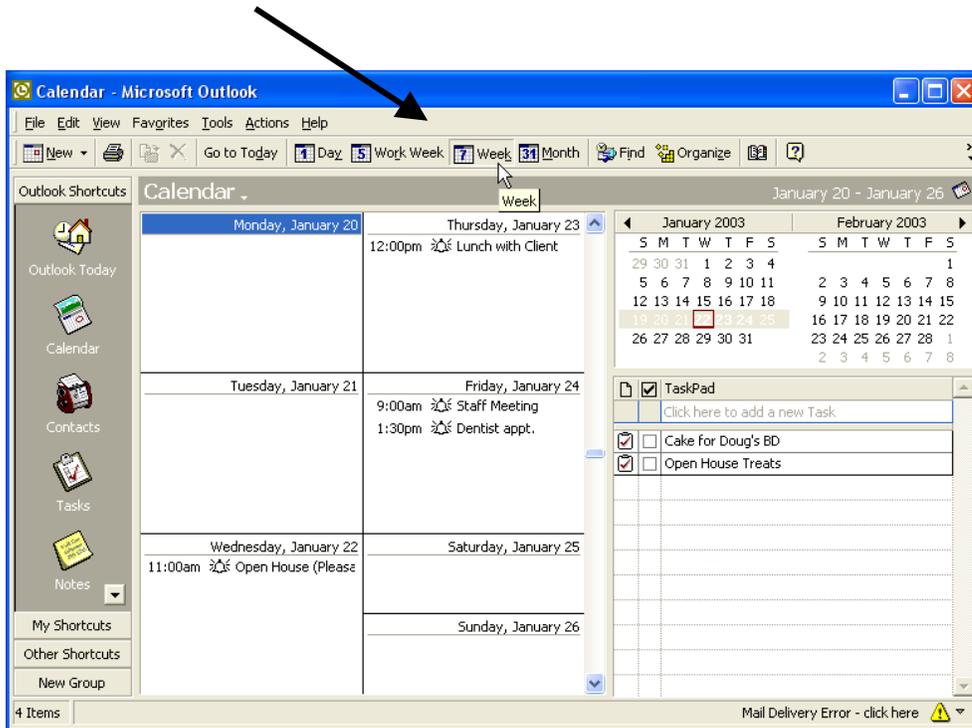
In *Outlook*, there are several ways of viewing your calendar. The **toolbar** at the top of the screen indicates which **view** is showing.



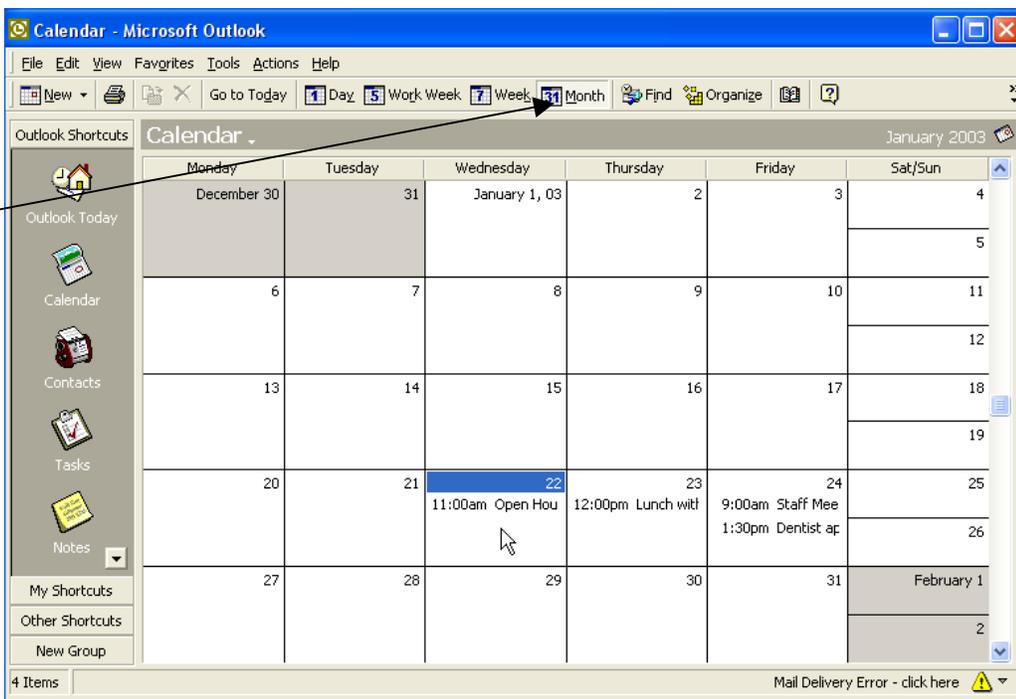
Click on the "Work Week" view.



Change to the "Week" view.



Change to the "Month" view.



Moving Appointments

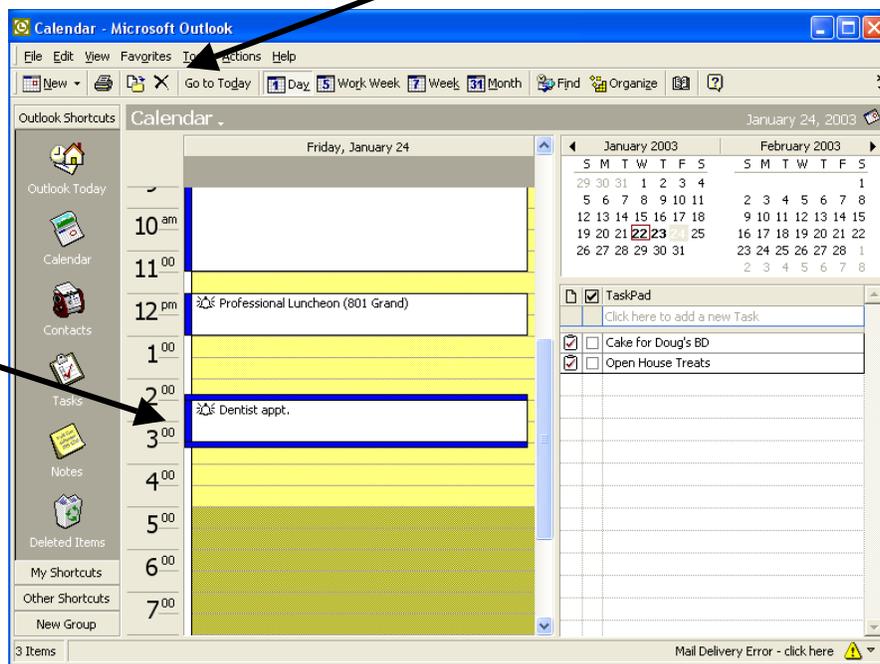
Outlook makes it very easy to move appointments using the different views of the calendar.

If you are only changing the time of the appointment, click on the "Day" view.

1. Click on the left outer frame of the appointment...

2. Click-and-drag the appointment to the new time.

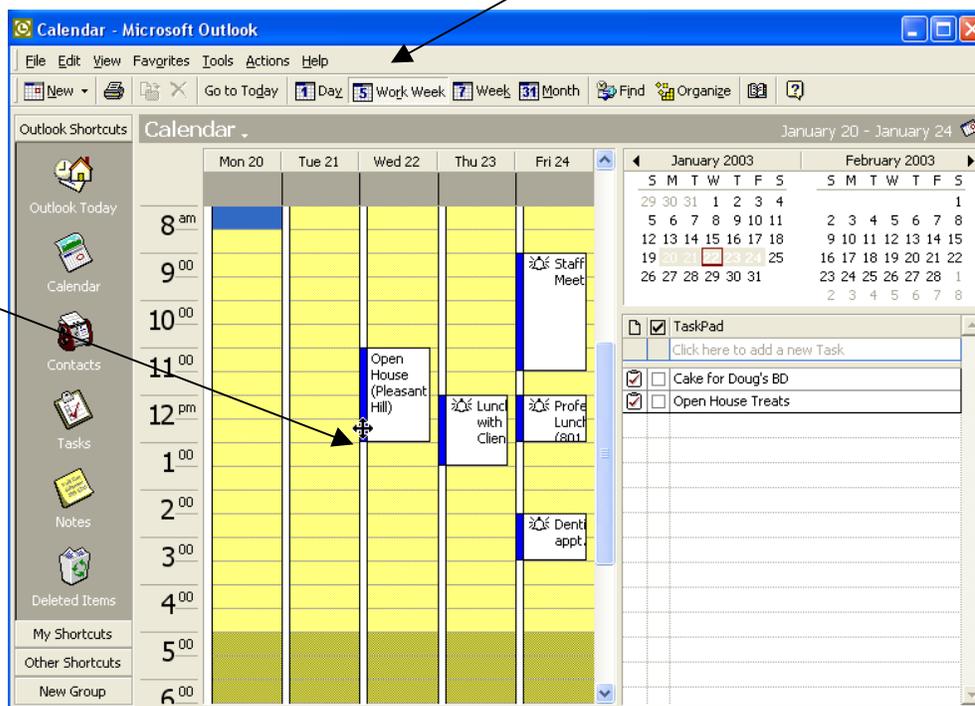
Notice your cursor changes to this shape



To move an appointment to a different date AND time, click on the **“Work Week”** view.

Click on the left side (the blue line) of the appointment and drag it to the new day and time.

Notice your cursor changes to this shape

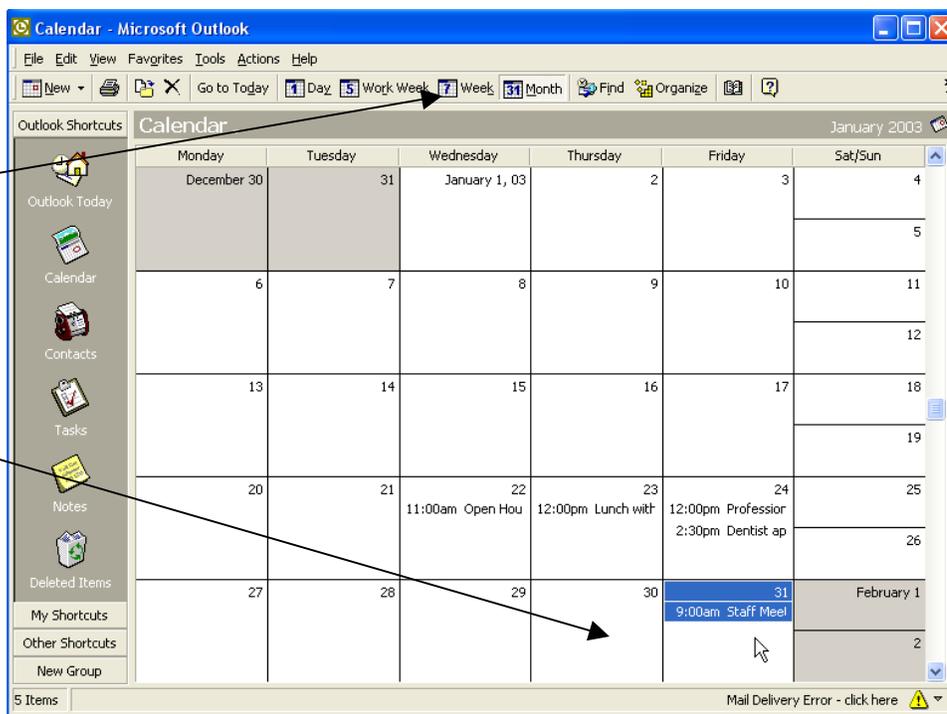


Changing appointment to a different day.

To move an appointment to a different day, click on the **“Month”** view.

Click on the **appointment** and drag it to the new date.

Notice your cursor changes to this shape



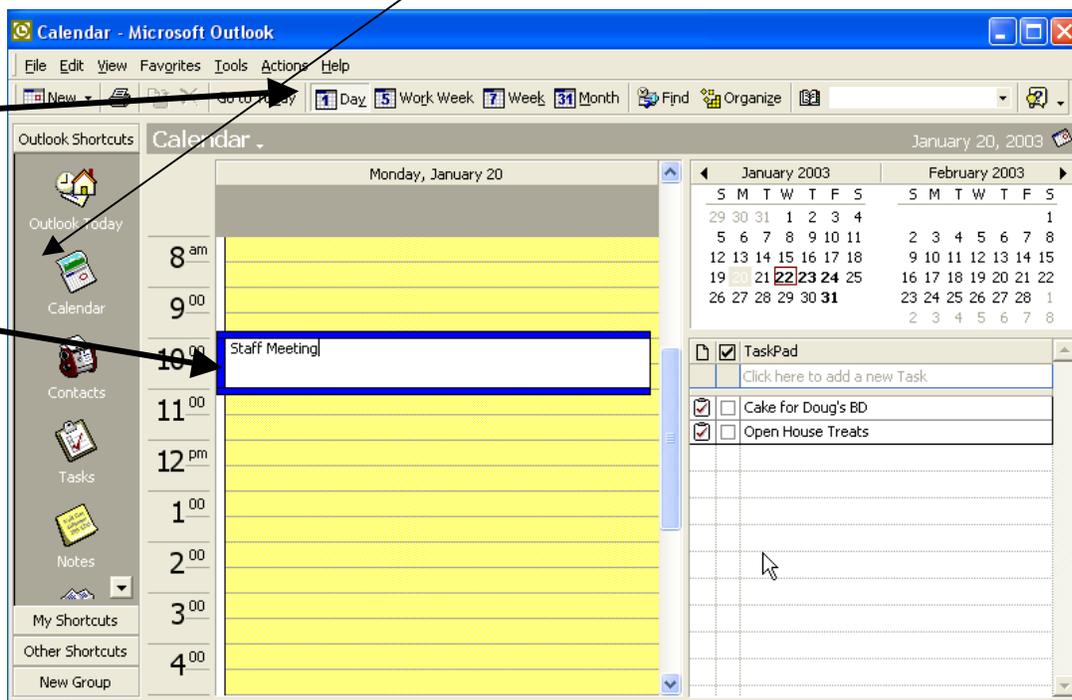
Recurring Appointments:

There are appointments that occur on a regular basis...these are called "recurring appointments". I.e. staff meetings that occur at the same time each week/month.

To set an appointment as a recurring appointment, open the **Calendar** icon;

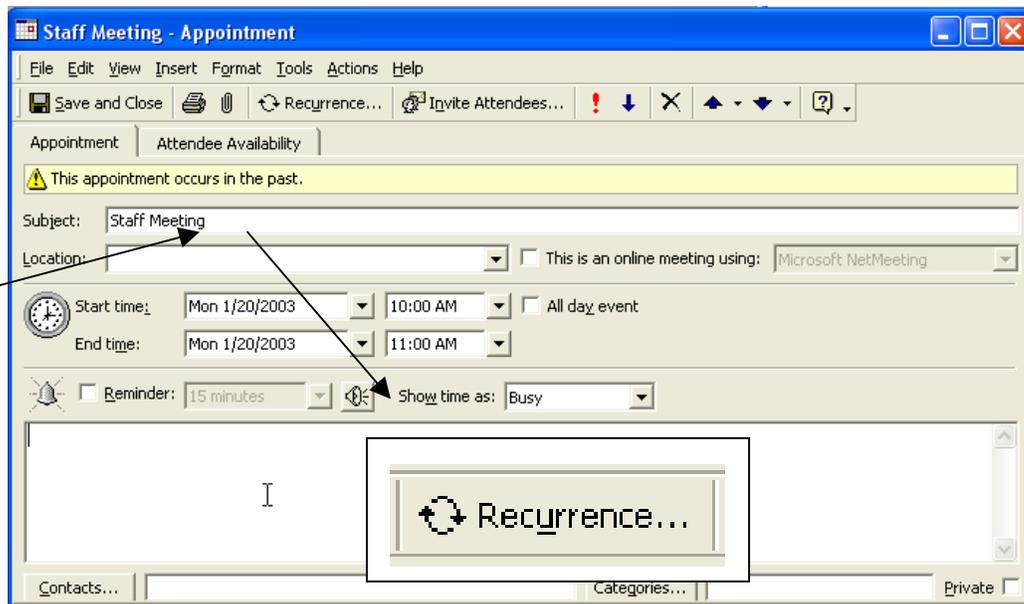
1. Click on **Day** view.

2. Enter the **appointment**



3. Double click on the **appointment**

4. Click on **Recurrence...**



5. Check the **time** to ensure it is correct.

If it isn't you can correct it from this screen.

6. Click the **pattern of recurrence**

The most important field in the Recurrence window is the **range of recurrence**.

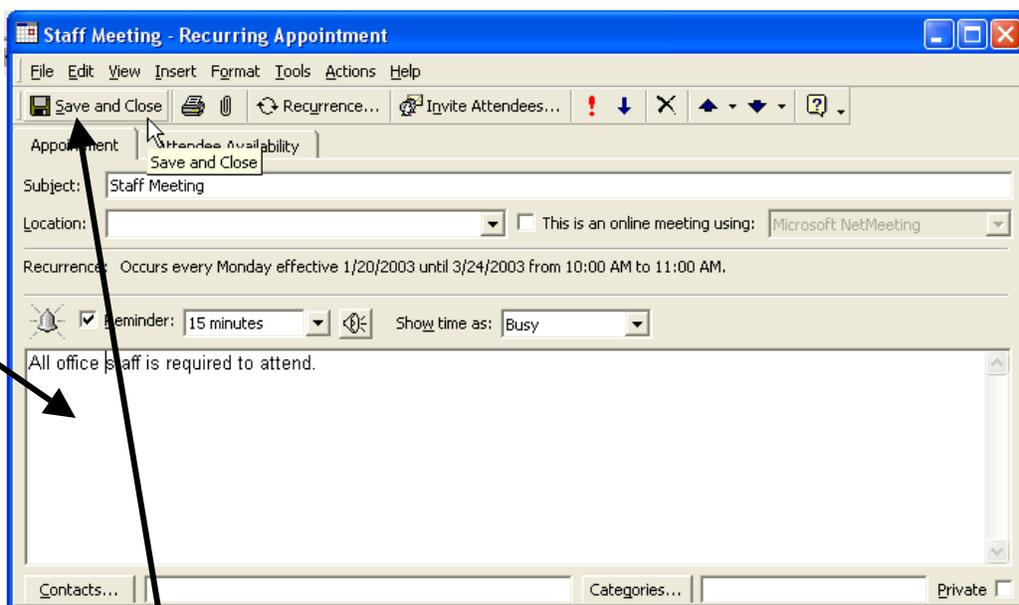
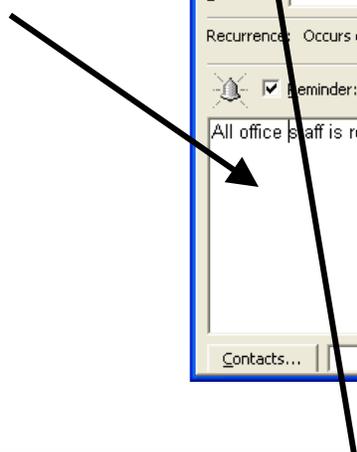
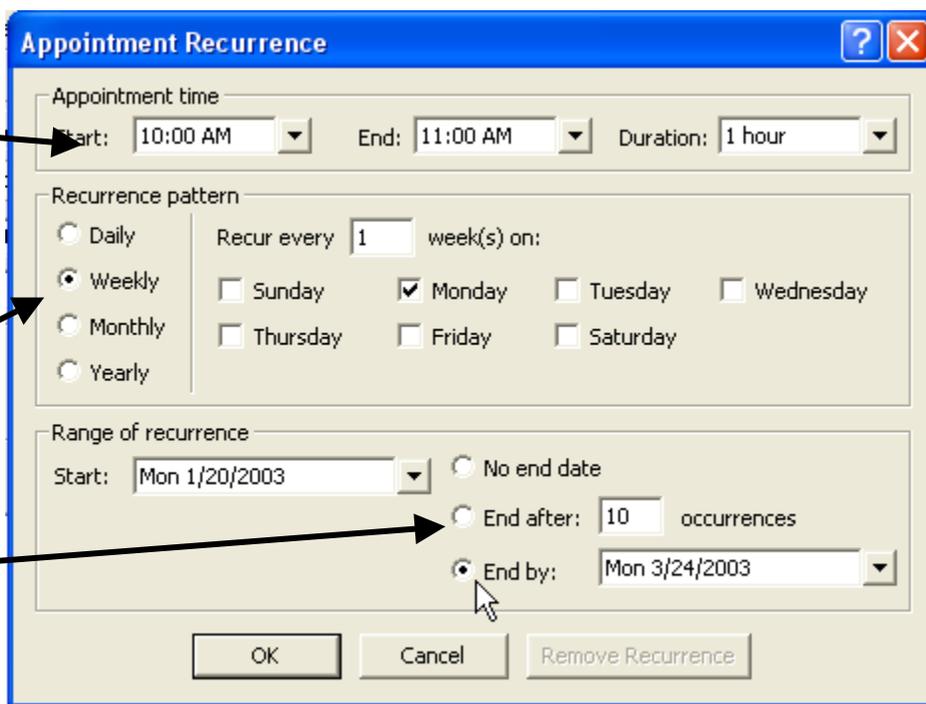
7. Set the range.

If you do not enter an "End by" date, it will default to 10 occurrences.

8. Click **OK**

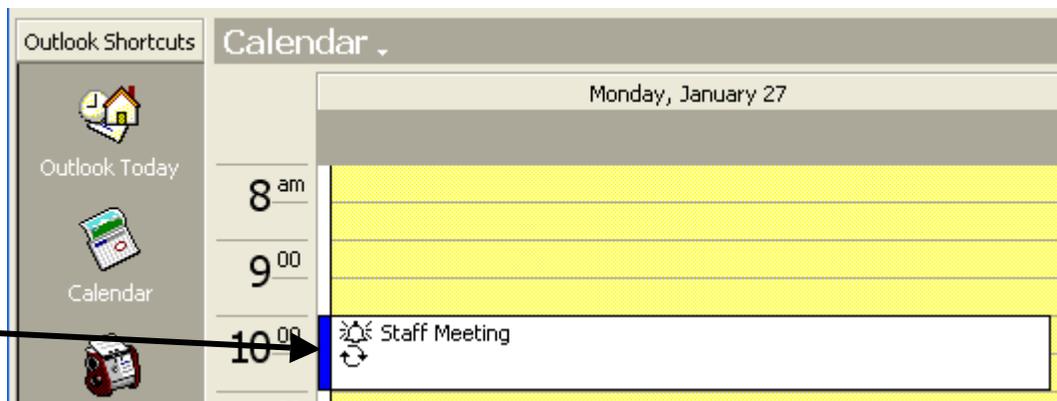
NOTE: unless the appointment occurs only once or twice a year, typically, you do not want to enter a range longer than 12 months.

Enter all other information on the appointment screen. I.e. **reminders, notes, etc.**

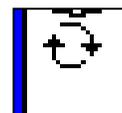


9. Click **Save and Close**

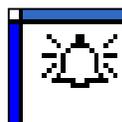
The appointment will have the **Recurrence** indicator next to the appointment.



If the appointment is a recurring appointment, the icon will look like this:



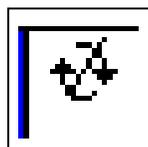
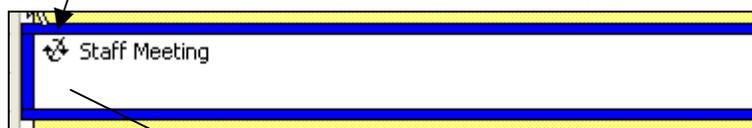
If you set a **reminder**, the icon will look like this:



To Move One Appointment In A Recurring Series:

If you have a schedule change for one appointment, click on the appointment and drag it to the new time/day.

You will see a **new icon** that indicates this is still a recurring appointment but has been moved from the normal day/time.

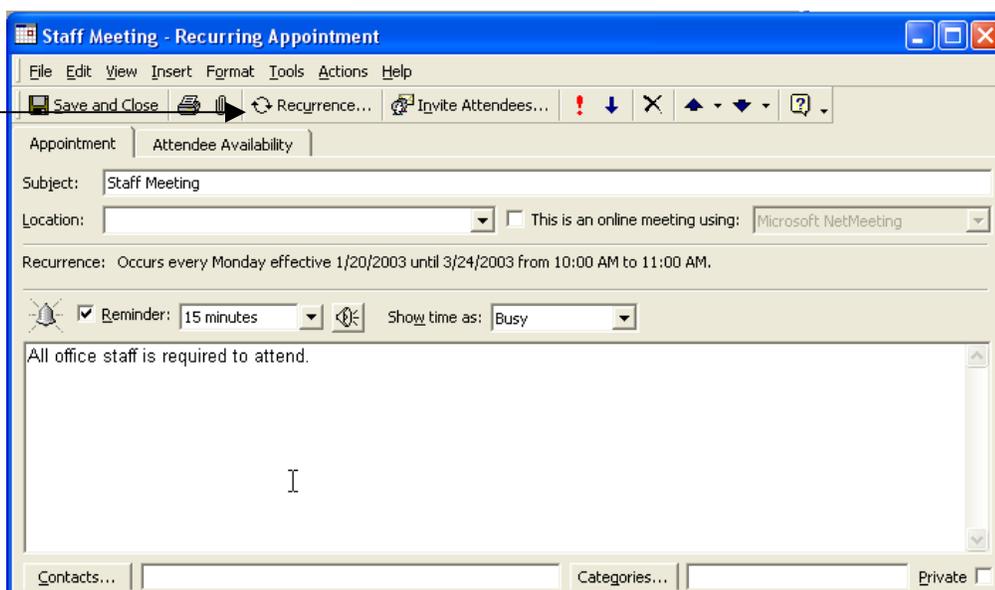


If you double click on the appointment, you will be given the opportunity to move the **whole series**.



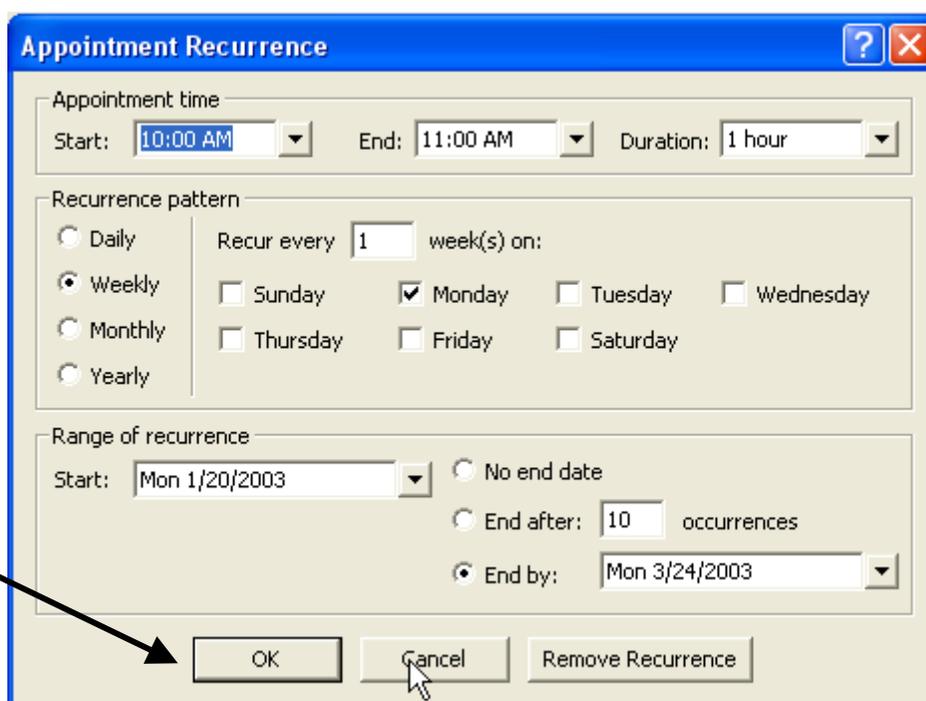
Click **OK**

Click on **Recurrence...**



Change the information.

NOTE: Remember, this will change the information for the **ENTIRE series of appointments.**



Click **OK**

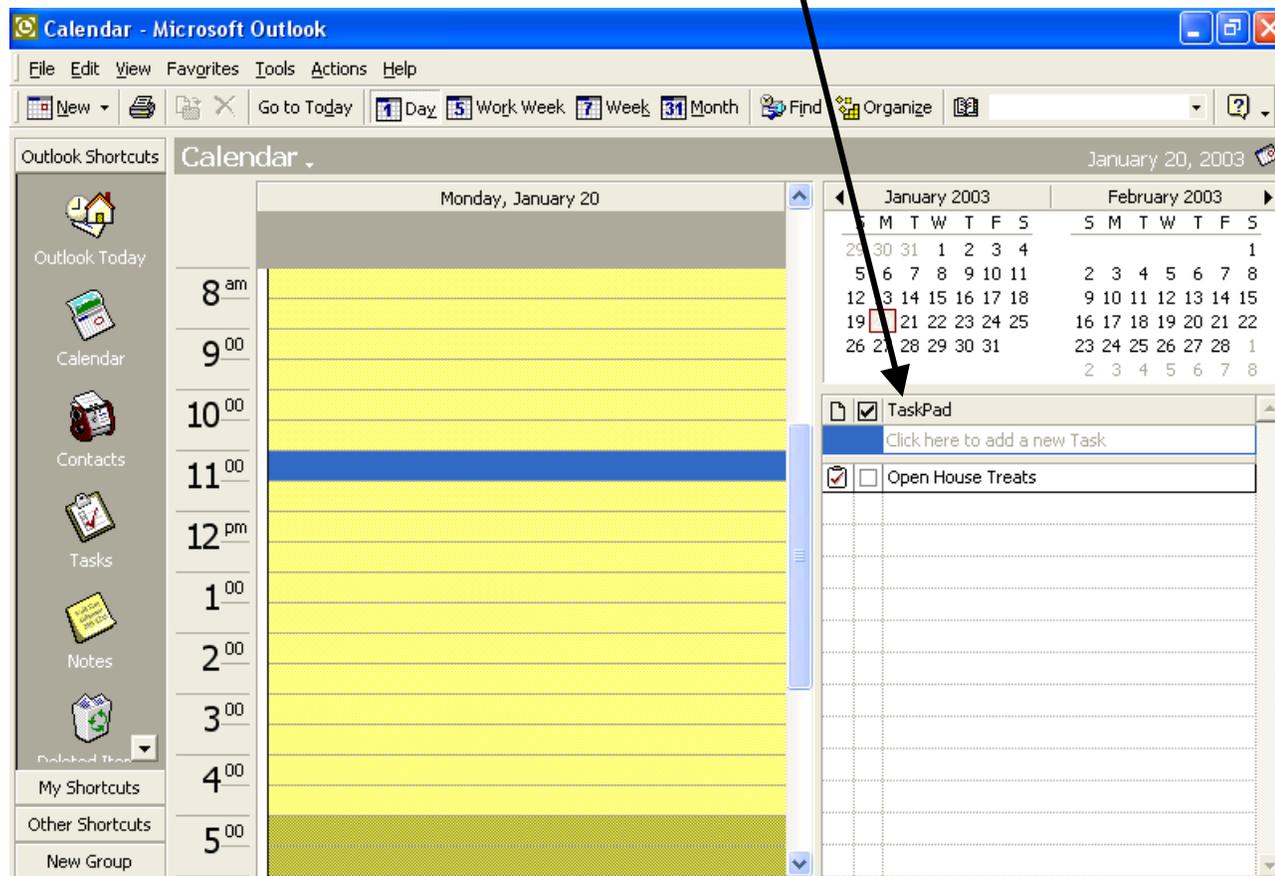
An **alert screen** will confirm that all appointments in this series will be set to this date and time.

Click **OK**.



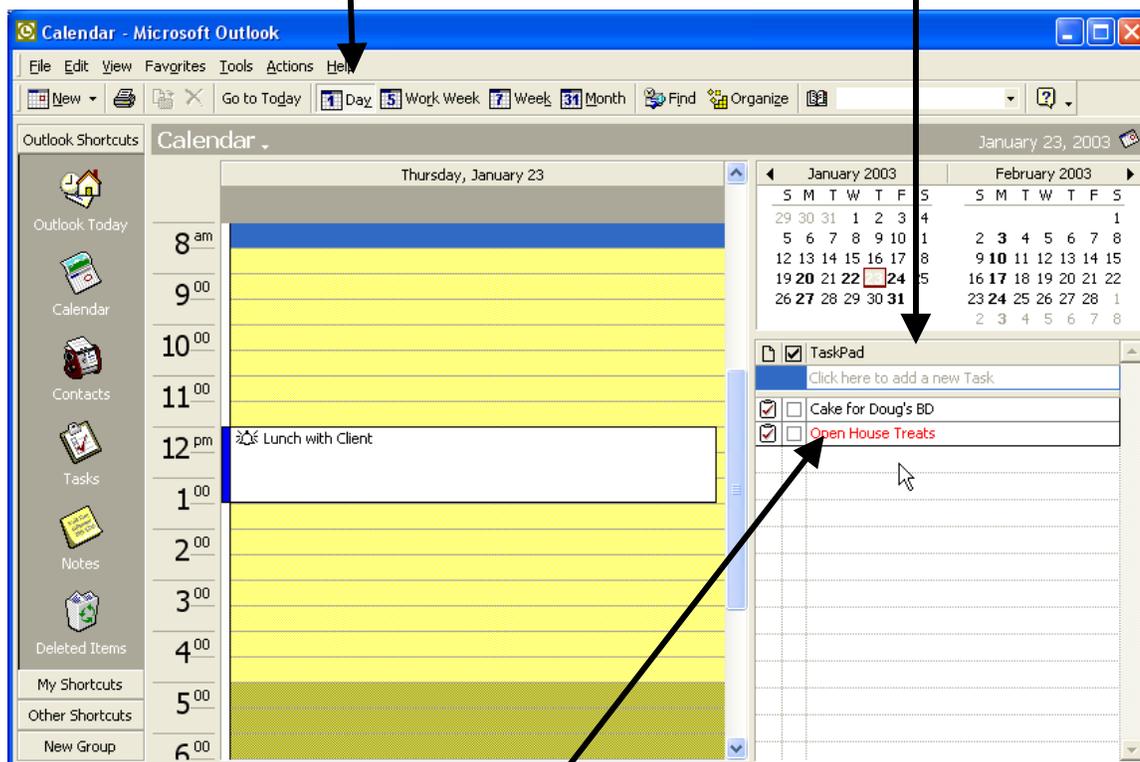
Tasks

A task is a reminder to you of items that have to be completed with no specific time allocated for doing it but one that you wish to track to completion.



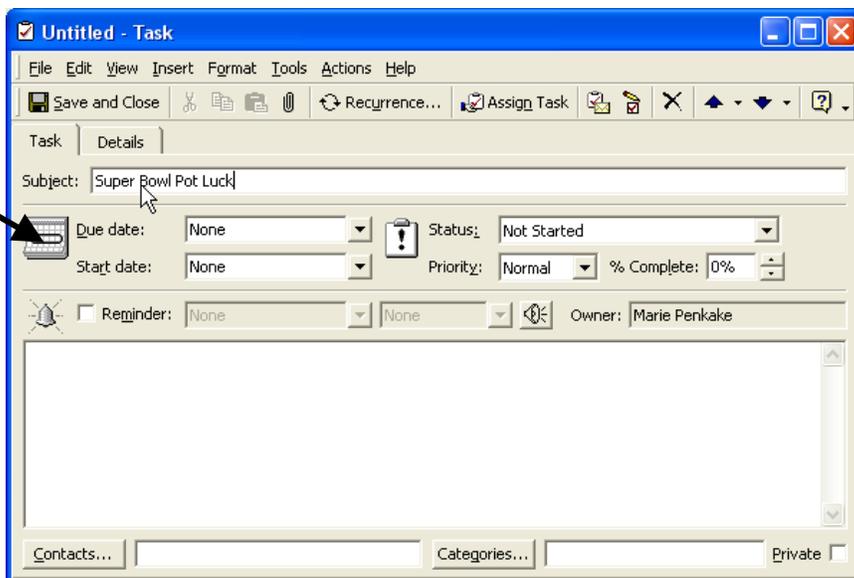
Create a Task:

To create a task, open the **Day** view of the Calendar. Look at the bottom right corner of the screen to see the "Task" area.



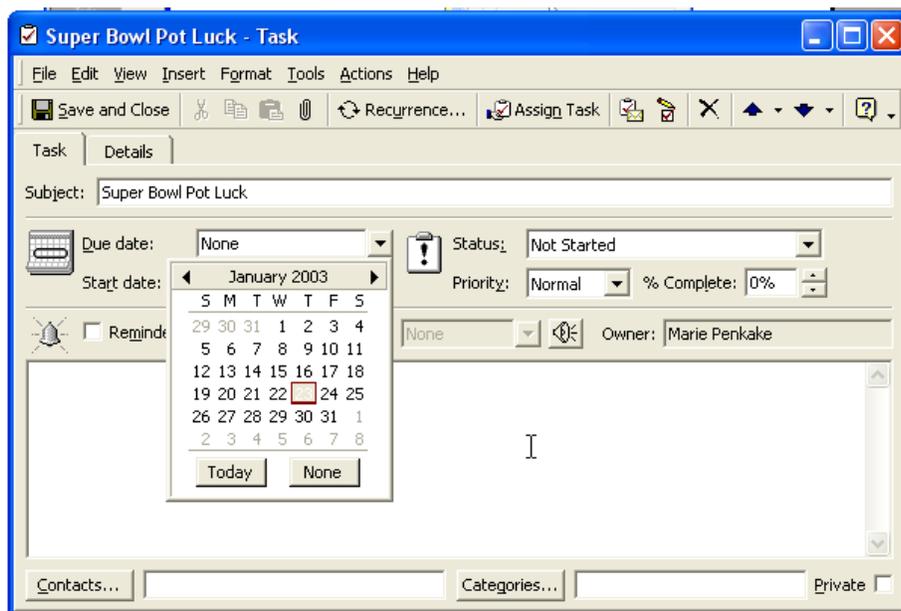
Double click on a specific task to show the **task details**.

Enter the **subject** and all other important information.



Included in the **Due/Start dates...** is a calendar function that makes it very easy to assign dates

NOTE: There is no time assigned to the defaulted due date.

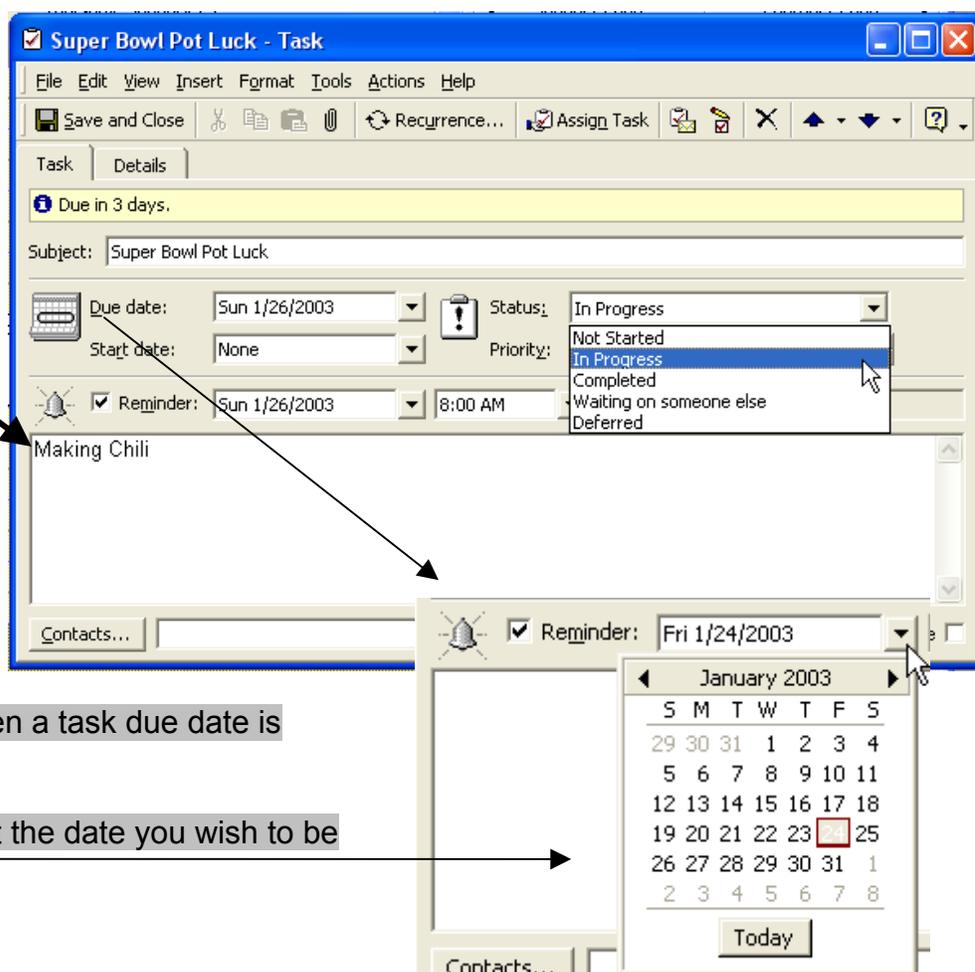


Enter any **notes** regarding this task.

Click **Save and Close**.

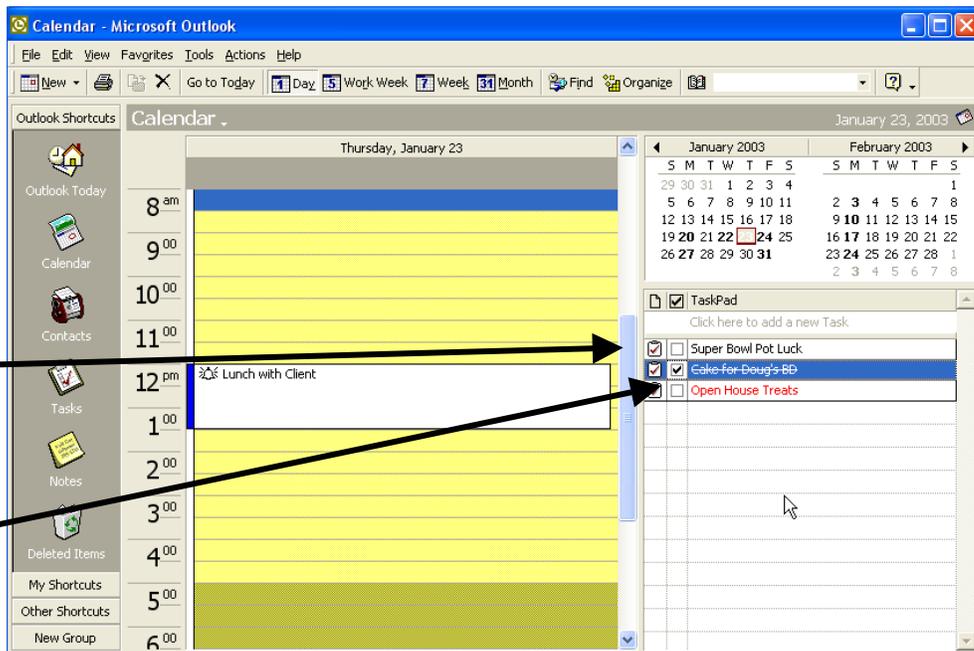
NOTE: A **Reminder** provides visual and/or audio alerts when a task due date is approaching.

Use the calendar to set the date you wish to be reminded.



Once you have saved a task, you will see it on the **Calendar** screen.

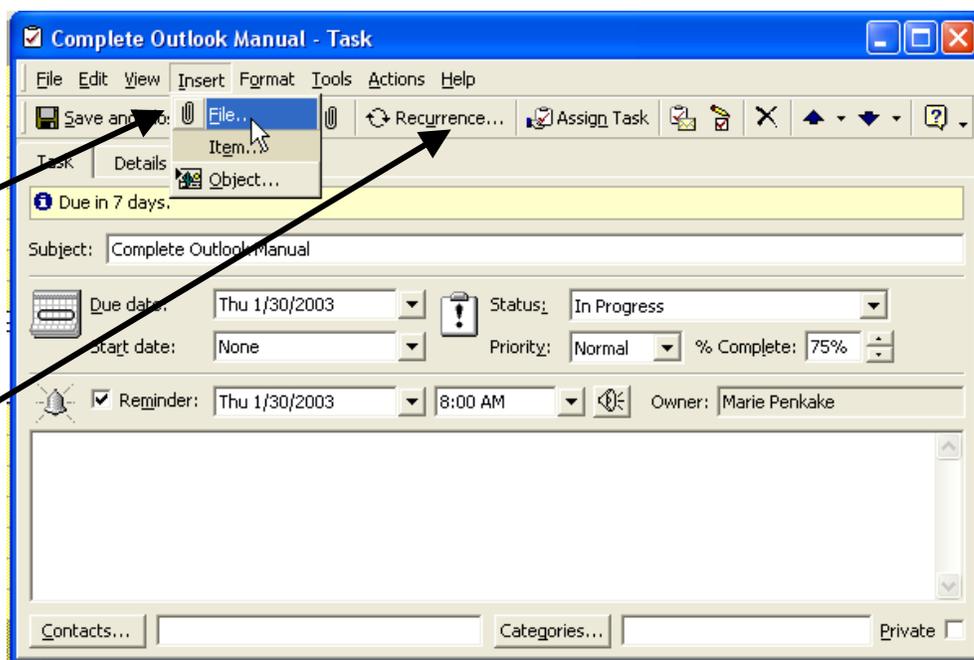
When you have completed a task, **check mark** it off or return to the task window and change the status.



Most of the functions that you have available for an appointment, are also available for Tasks.

For example, you can **attach a file...**

...and/or set a task as a **recurring event.**



Deleting Completed Tasks:

To delete a task that is completed.

Right click on the task and choose **Delete (X)** from the menu choices.

