

Using Microsoft Outlook 2003

A Beginners Guide

Email and Calendars



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Introduction

This documentation is meant to function as a guide for individuals that may be unfamiliar with Microsoft Outlook. The more advanced features of Outlook are not included. This documentation covers the following topics:

The Outlook Screen

Working with Email

- Creating a Signature File

- Sending Email

 - Additional Email Options

 - Sending Attachments

- Receiving Email

 - Replying to Email

 - Forwarding Email

 - Flagging Email for Follow-up

 - Additional Options

- Out of Office Assistant

- Personal Address Lists (Contacts)

- Distribution Lists

- Saving and Storing Email (Personal Folders)

 - Creating Personal Folders

 - Moving Mail to a Personal Folder

Working with Calendars

- Viewing the Calendar Creating an Appointment

- Creating a Recurring Appointment Scheduling Group

- Meetings Creating a Group Calendar

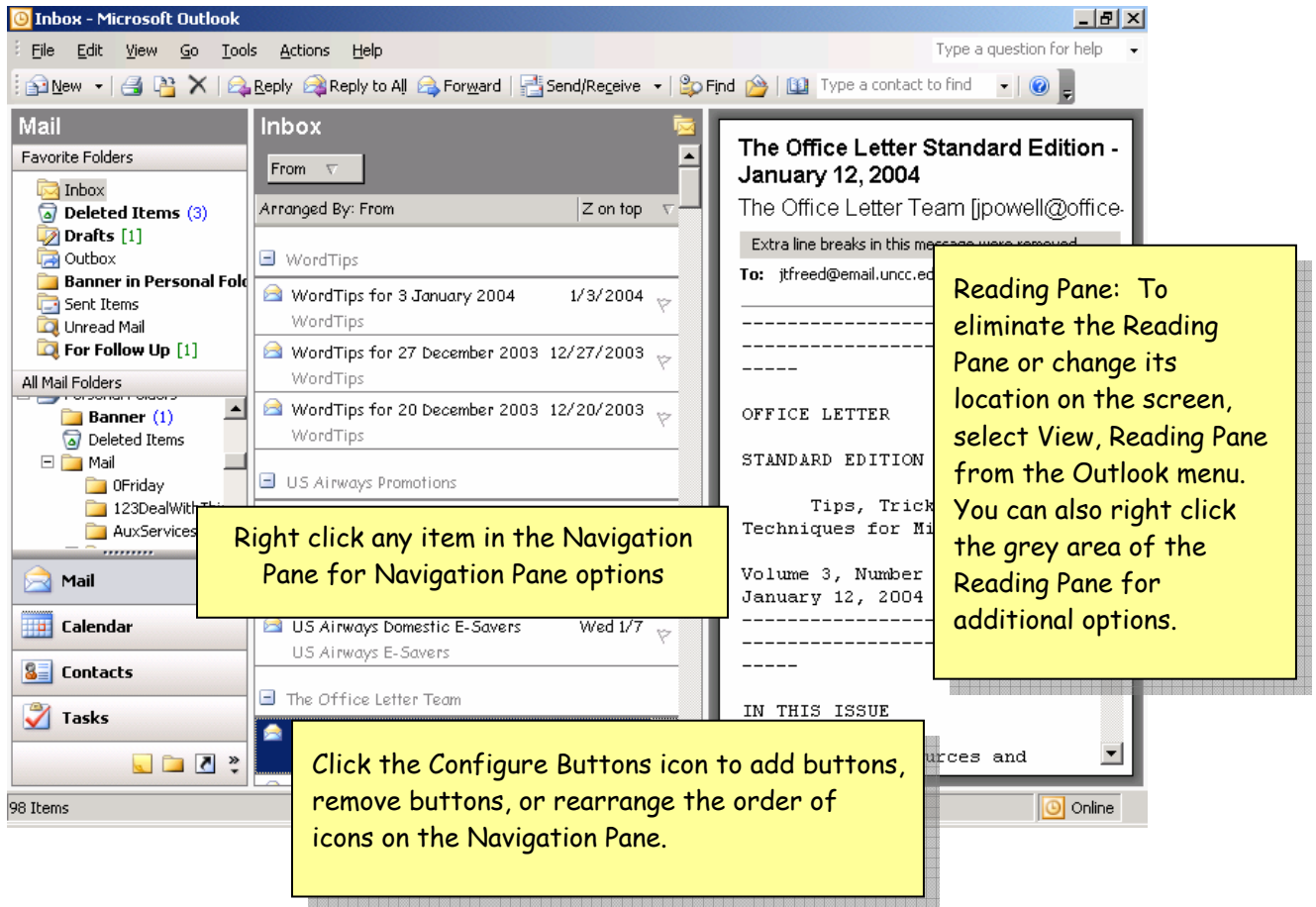
For additional information on working with Outlook 2003, please go to this web site:

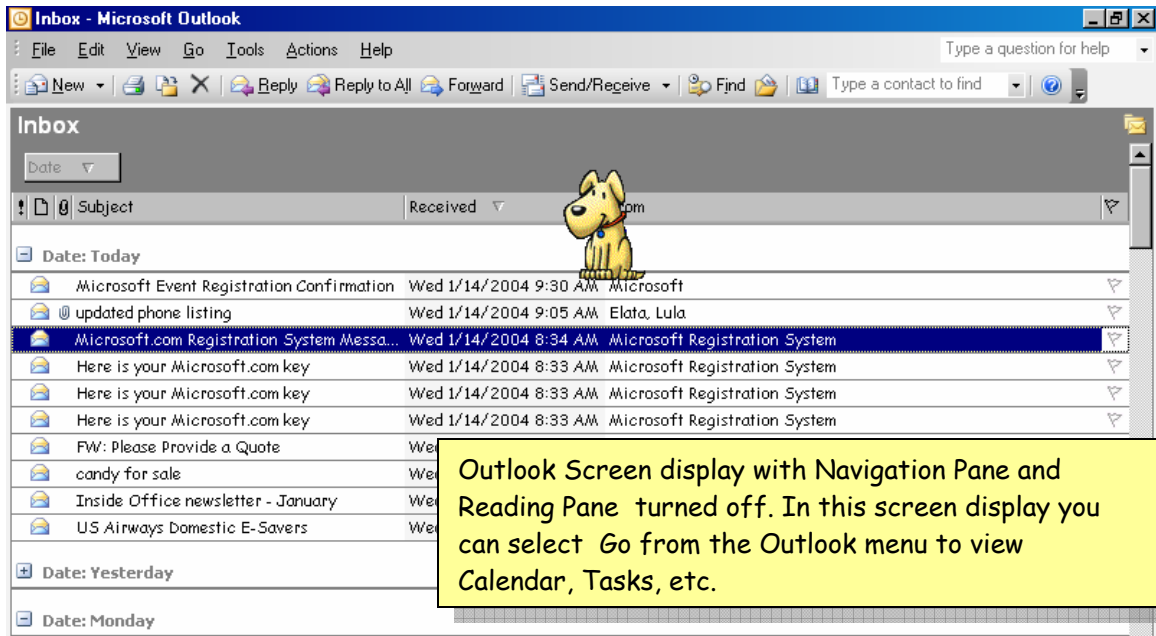
[Software Documentation](#)

The Outlook Screen

When you open Microsoft Outlook, the following screen will display:

The Navigation pane displays on the left side of your screen and is a combination of the shortcut bar and folder list found in previous versions of Outlook. **Select View, Navigation Pane to turn off/on**





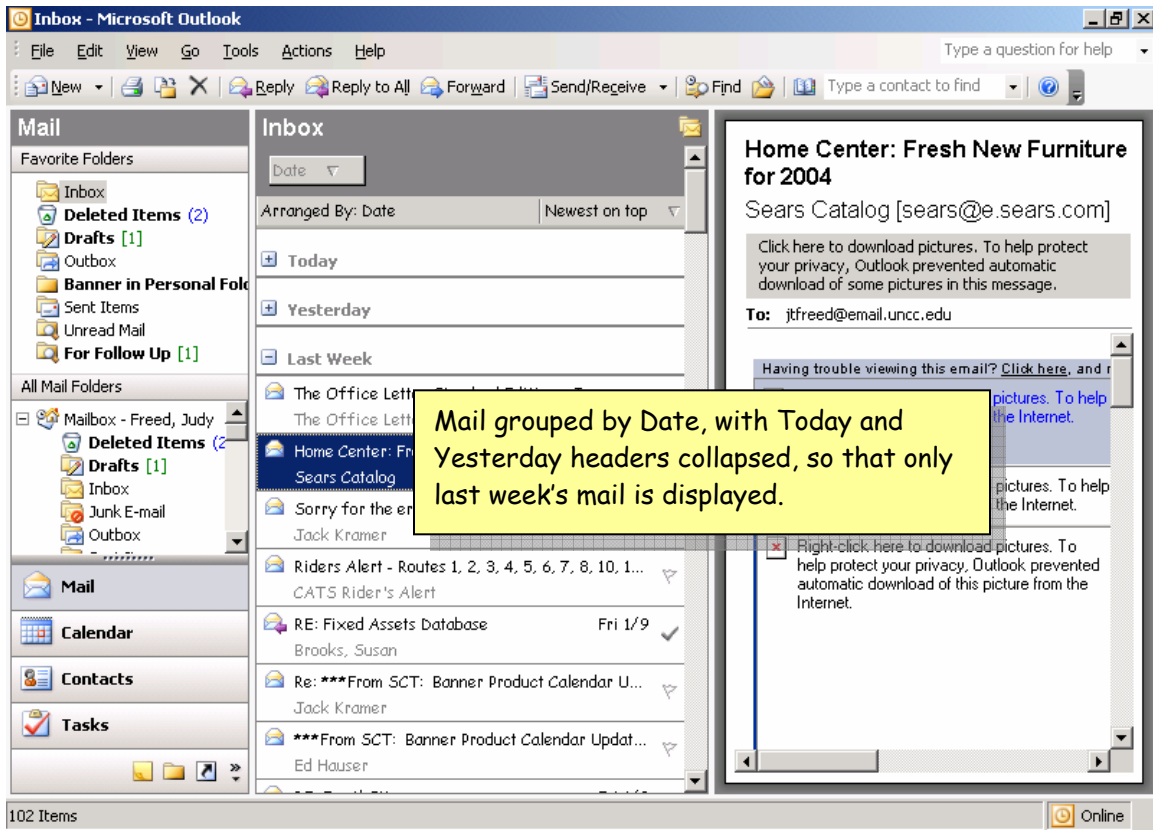
Navigation Pane Notes:

- Click on the Calendar, Contacts, icon, etc. to view them. To view Calendar, Tasks separately, right click and select View, Open in New window. Notice that the Notes icon is located at the very bottom of the Navigation Pane.
- By default, viewing an item in the Reading Pane does **not** cause Outlook to mark the message as "Read". If you would like to change that, select Tools, Options, and on the Other tab, click Reading Pane and select "Mark Item as Read when Viewed in the Reading Pane"
- Favorites Folders section: Any folder can be dragged to the Favorites Folders section. In addition, note the Unread Mail and Followup Folder. The Unread Mail folder contains unread mail, and the Followup Folder contains all mail flagged for followup. **NOTE:** Deleting mail or moving mail from the Unread folder or the Followup Folder deletes or moves the email in the Inbox as well.
- If you would like Outlook to open displaying the "Outlook Today" screen, select View, Toolbars, Advanced, then click the Outlook Today icon. Click Customize Outlook Today and select "When starting go directly to Outlook Today"

Message Grouping

Email can be grouped in a variety of ways, such as date, conversation, sender etc. Group Headers can be expanded or collapsed.

NOTE: If you arrange email by conversation (thread), note that only Unread email is shown by default. Click the check mark next to the conversation topic to expand the conversation and view all email.



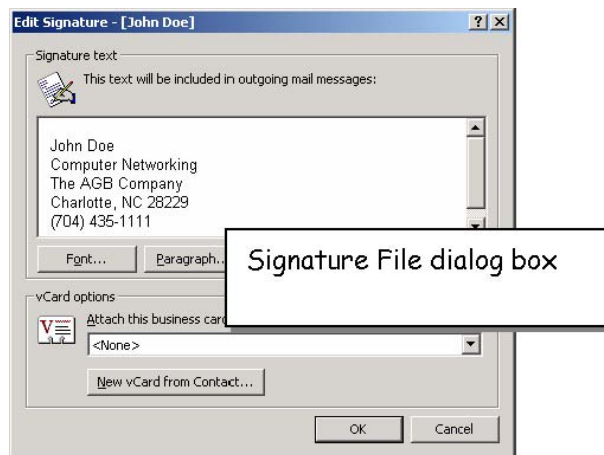
Working with Email



Creating a Signature File

A signature file contains text that is automatically added to email messages. To create a signature file:

1. With your Inbox displayed, select *Tools, Options*.
2. Click the *Mail Format* tab.
3. Click *Signatures*, then click *New*.
4. In the *Create New Signature* box, type a name for your signature file, then click *Next*.
5. In the *Edit Signature* box, type your name and any additional text, such as your department, extension, etc. as you would like it to display in outgoing email messages. Click the *Font/Paragraphs* buttons to change fonts or paragraph alignment.
6. When you are done, click *Finish* then click *OK*. Make sure that the name of your newly created signature file is displayed in the "Signature for New Messages" portion of the Options screen, then click *Apply*, then click *OK*.



Sending Email

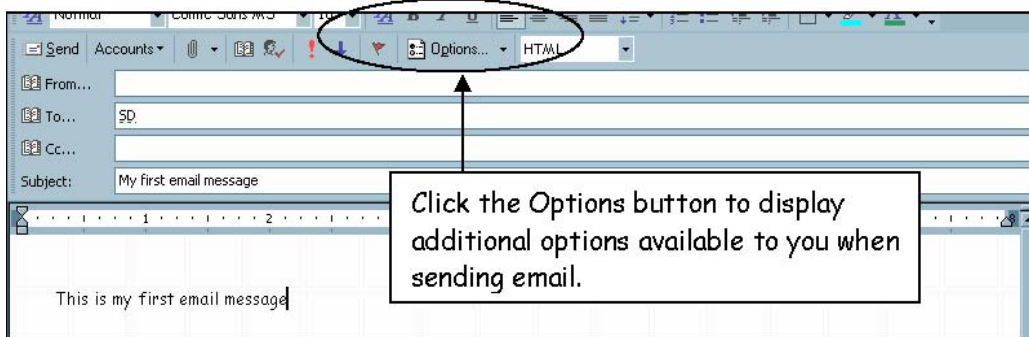
From the Inbox menu, click the *New* button on the Outlook toolbar, or select *File, New, Mail Message* from the Outlook menu. A blank message form displays.

Complete the message form as follows:

1. Click the *To* button to display the global address list and/or your personal address book to select recipients from. Once you have selected a recipient from the *Name* box, click the *To* button to move the name to the *Message Recipients* box. Continue to select recipients in this manner. You may also

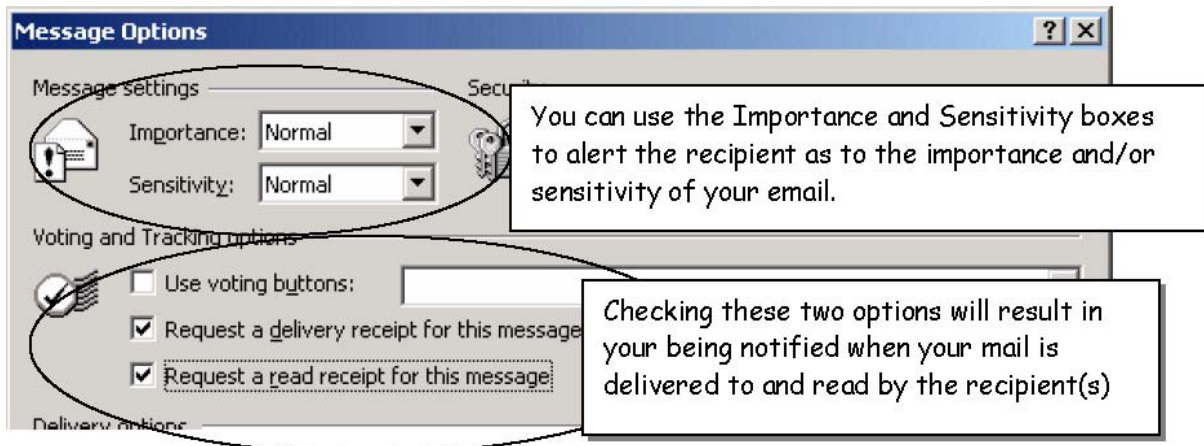
select the names of individuals you want to carbon copy (cc) or blind carbon copy (bcc) at this screen. When you are done, click OK.

2. Type a brief description of your email message in the Subject line, then click in the large message body box and type your message. Click Send when you are done.



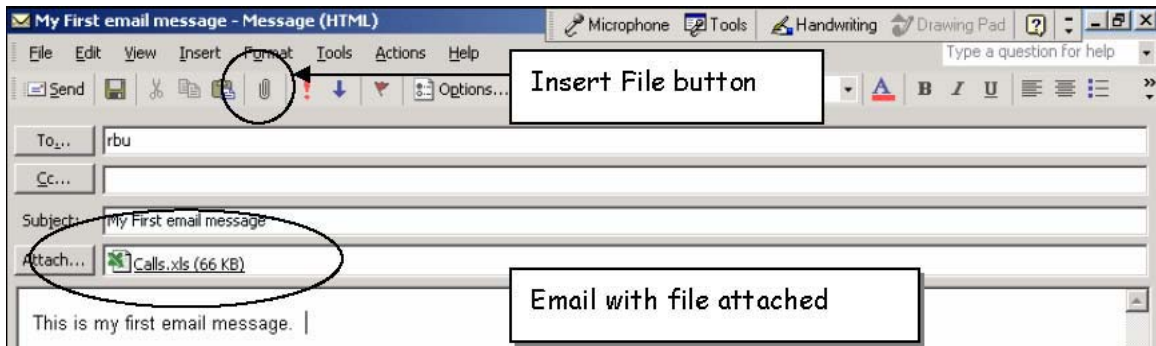
Additional Email Options

- If you wish to receive a notification when your email is delivered and/or read by the recipient(s), do this prior to sending the email: Click the *Options* button on the message screen, and then select the desired option(s), then click OK.
- You may also alert the recipient as to the Importance/Sensitivity of your email by selecting the appropriate setting from the drop down lists. Your mail will be flagged accordingly.



Sending Attachments

If you want to send a file with your email, click the Insert File button on the Outlook toolbar. The Insert File button resembles a paper clip. Browse to the file you wish to attach. Once you have located the file you wish to send, select it, then click Insert. The file name will display in the Attach field of the email.



Receiving Email

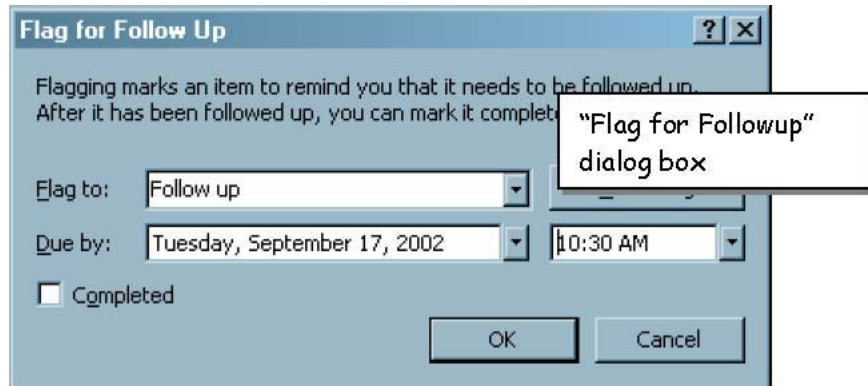
Incoming email messages are stored in the Inbox. Messages that you have not yet read are displayed in bold. In addition, messages that you have not yet read can be accessed through the "Unread Mail" folder. To read a message, double click on the message. Listed below are some actions you can take with incoming email messages:

Replying to Email: To reply to an open email message, click the Reply button on the toolbar. Type your reply then click Send. There is also a Reply To All button that allows you to reply to **all** recipients of the original mail, including those that were carbon copied and blind carbon copied.

Forwarding Email: Clicking on the Forward button allows you to forward the email to another individual. The email displays in a new window and you must type or select the email address of the desired recipient, type a message of your own if appropriate, and then click the Send button.



Flagging Email For Followup: You can place a flag on email as a way to remind yourself that additional action needs to be taken. To flag an email for follow up, right click the email message in your Inbox and select Followup, then select the color flag you would like to use. You can also click "Add Reminder" to enter additional followup options.



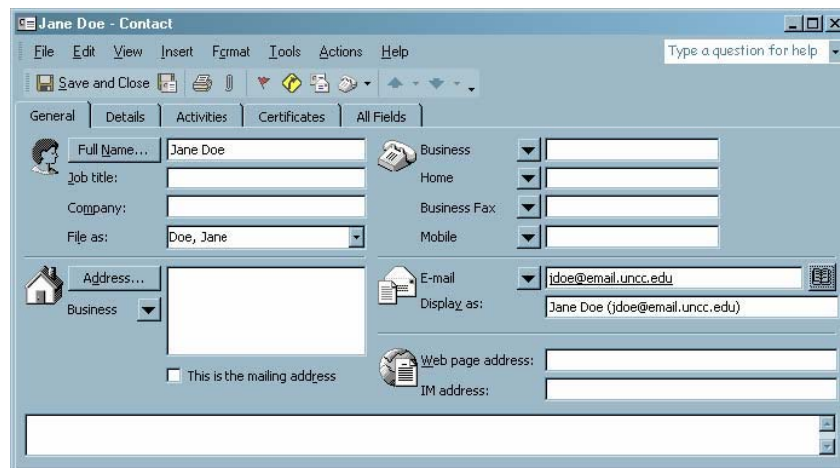
Additional Options

You may also print, copy and delete email. Deleted email is stored in the Deleted Items folder, which must be emptied periodically. Empty the Deleted Items folder by right clicking the Deleted Items icon in the Navigation Pane and selecting Empty Deleted Items from the shortcut menu. **Note:** Once you empty the Deleted Items folder, email that was placed there is no longer accessible. If you want to save mail, you must use Personal Folders (see Saving and Storing Email).

Personal Address Books

You might wish to store frequently used email addresses in a Personal Address book. The easiest way to do this is use the Contact feature of Outlook.

1. From the menu, select File, New, Contact. The Contact dialog box will display.
2. Type the name of the contact, and the email address (or click the Address Book icon next to the Email address field to select a name from the global address list.)
3. Any other information you enter is optional. When you are done, click Save and Close.



4. To select a Contact in a new email message, click the To button in the message, then select Contacts from the Show Names In..field of the dialog box..

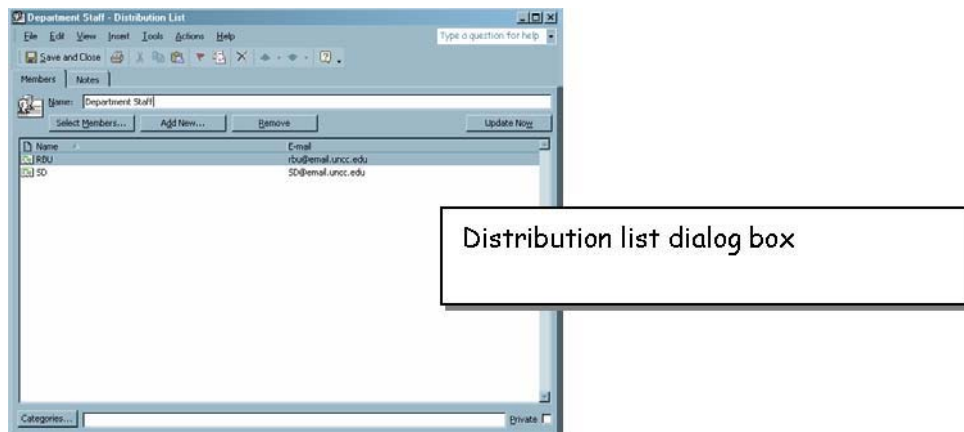
NOTE: If the Contact list does not display as an address book:

1. Click the Contacts icon at the bottom of the Navigation pane.
2. When the Contacts screen displays, right click Contacts under "My Contacts" and select Properties.
3. Select the Outlook Address Book tab and make sure that Show This Folder as an Email Address Book is checked.

Distribution Lists

Distribution lists simplify the process of sending mail to groups of individuals. For example, if you frequently email everyone in your department, you might wish to create a distribution list for your department.

1. To create a distribution list, select File, New, Distribution List from the Inbox menu.
2. The Distribution List dialog box displays. Type a name for the Distribution list in the Name field.
3. Click Select Members to select members from the global address list or your personal address book.
4. Once the address list displays, click on the name of any individual you wish to add to the distribution list, then click the Members button. To select multiple names, hold down the Ctrl key while selecting names.

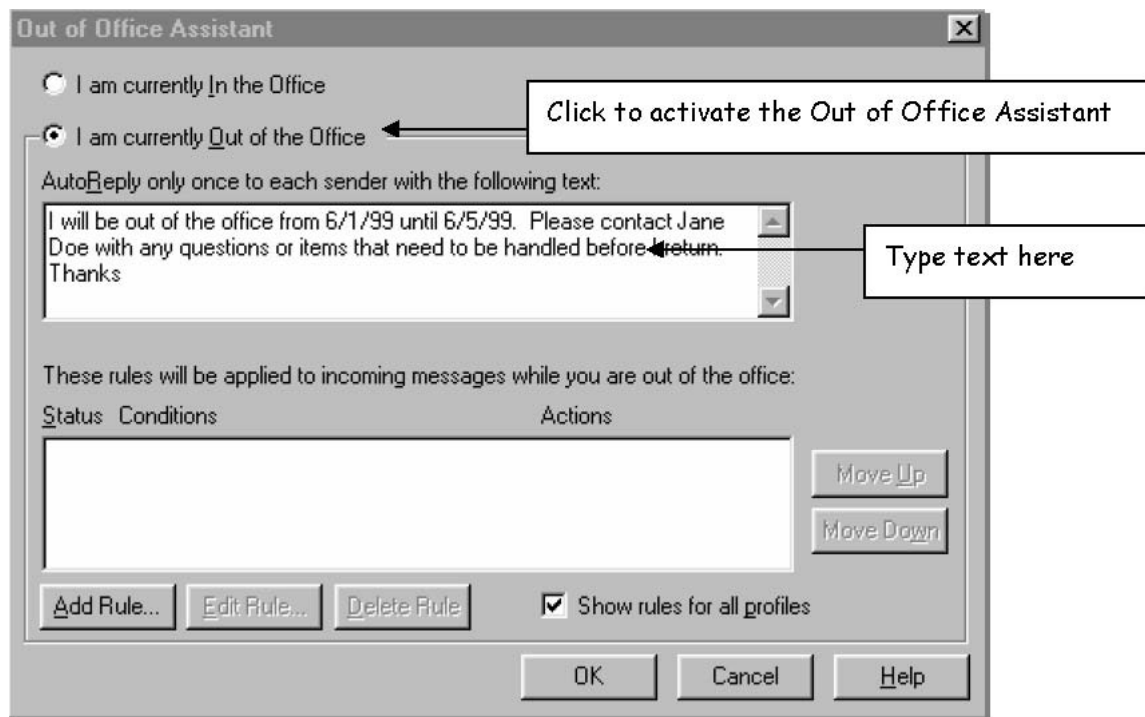


5. If the individual is not on the global address list, you can click Add New in the Distribution List dialog box. Clicking Add New displays a dialog box in which you type the display name and email address of the individual you are adding to the distribution list.
6. Click Save and Close when you are done. Distribution lists are stored in the Contacts folder.

To use a distribution list when sending email, click the To button on the email message screen, then select Contacts from the "Show Names from the" field in the Select Names dialog box. Click on the name of your distribution list, then click To, then click OK.

Out of Office Assistant

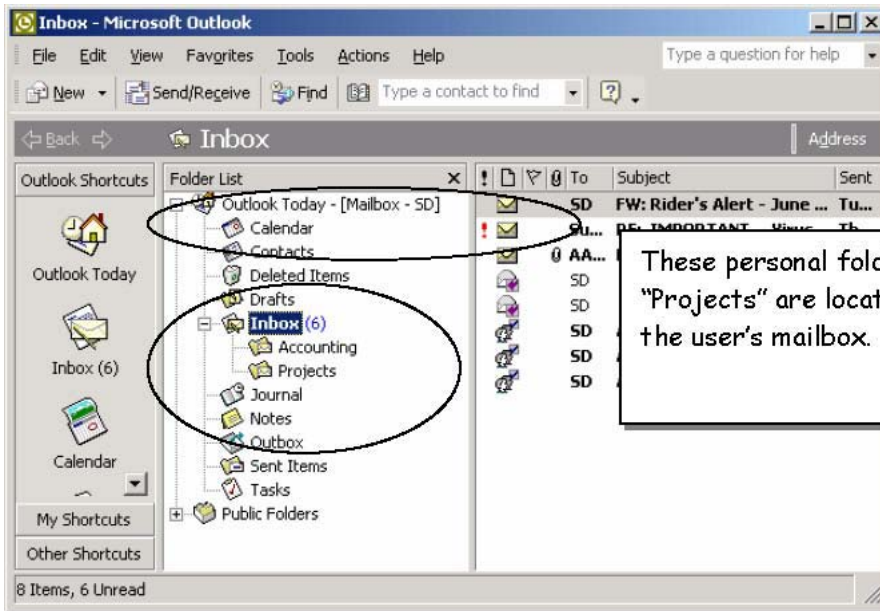
If you plan to be out of the office for a day or longer, you can use the Out of Office Assistant to automatically generate replies to any email you receive while you are gone. From the Inbox menu, select Tools, Out of Office Assistant. Complete the dialog box and click OK when you are done. MS Outlook will automatically send the response you indicate for as long as "I am currently out of the office" is selected. When you return to the office, follow the above steps and click "I am currently in the Office" to deactivate the Out Of Office Assistant.



Saving and Storing Email (Personal Folders)

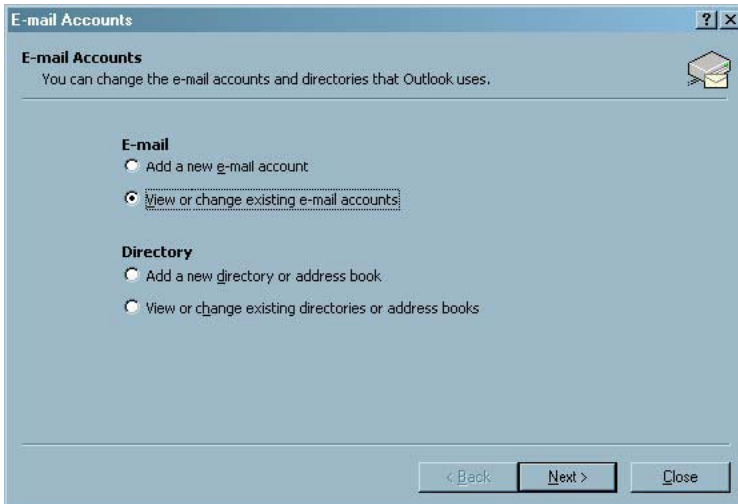
Personal folders allow you to move mail from the email server to your computer, thereby reducing the chances of exceeding your mailbox's storage capacity. Some additional notes:

- You cannot access your personal folders when you use the web to access Outlook.
- Messages can be dragged from your Inbox to your personal folders.
- Personal Folders should **not** be located under your mailbox's Inbox. For example:

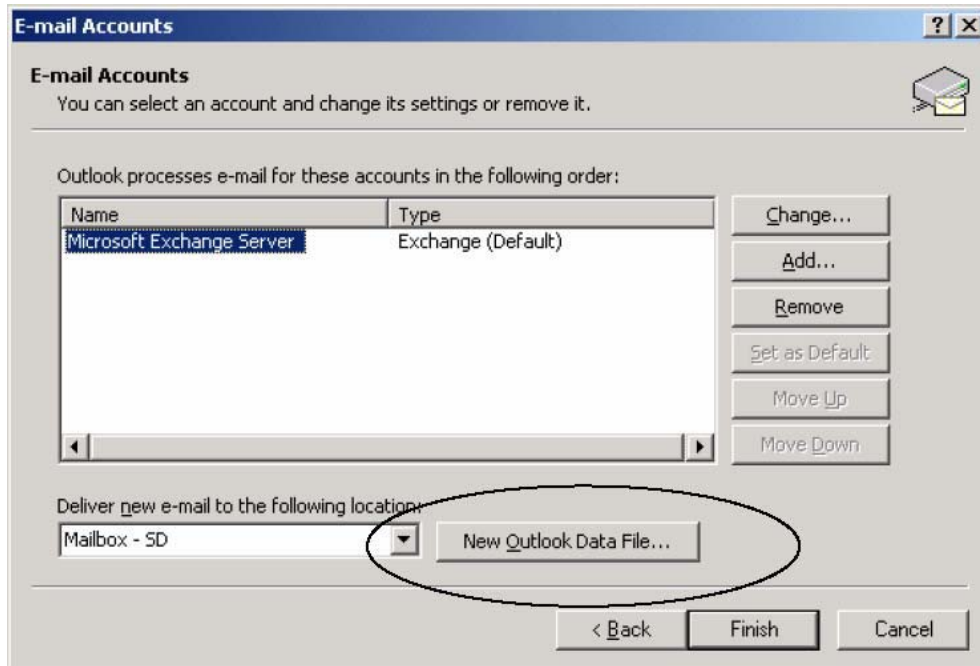


Creating Personal Folders

From the Inbox menu, select Tools, E-Mail Accounts, View or change existing e-mail accounts. Click Next.

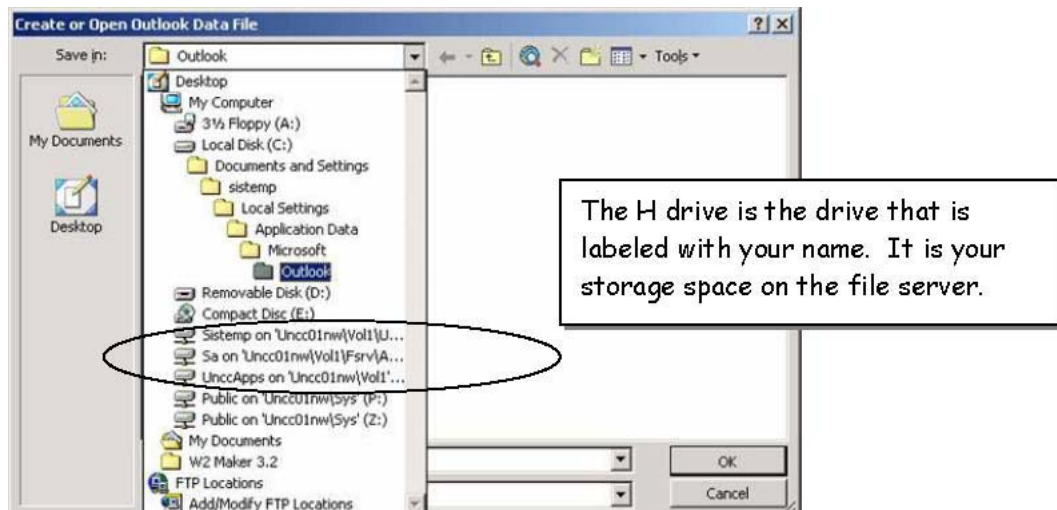


Click New Outlook Data File button.

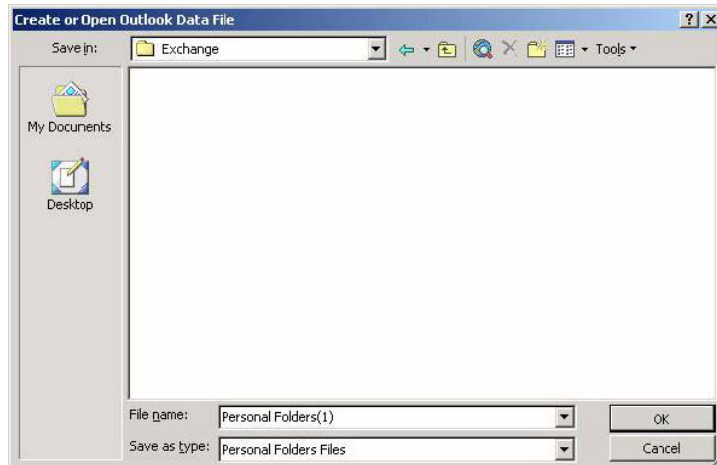


Select either "Office Outlook Personal Folders File (pst) OR "Outlook 97-2002 Personal Folders File (pst) then click OK.

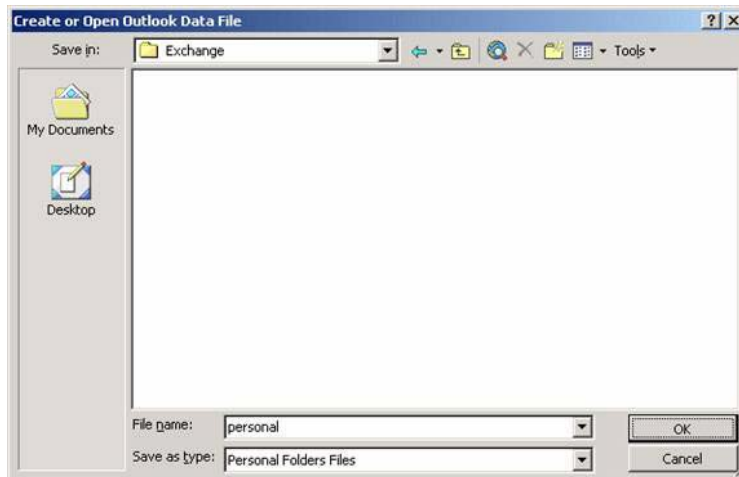
In this next dialog box, you will select the location for your personal folders. Personal folders should be stored in **H:\Exchange** or **H:\Outlook** so that you can access them from any computer that you logon to. Follow these instructions to complete this dialog box: Click the triangle next to "Outlook" in the "Save box. From the drop down list that displays, select the H drive.



- Once you have selected the H drive, double click the Exchange (or Outlook) folder to bring up the following dialog box.



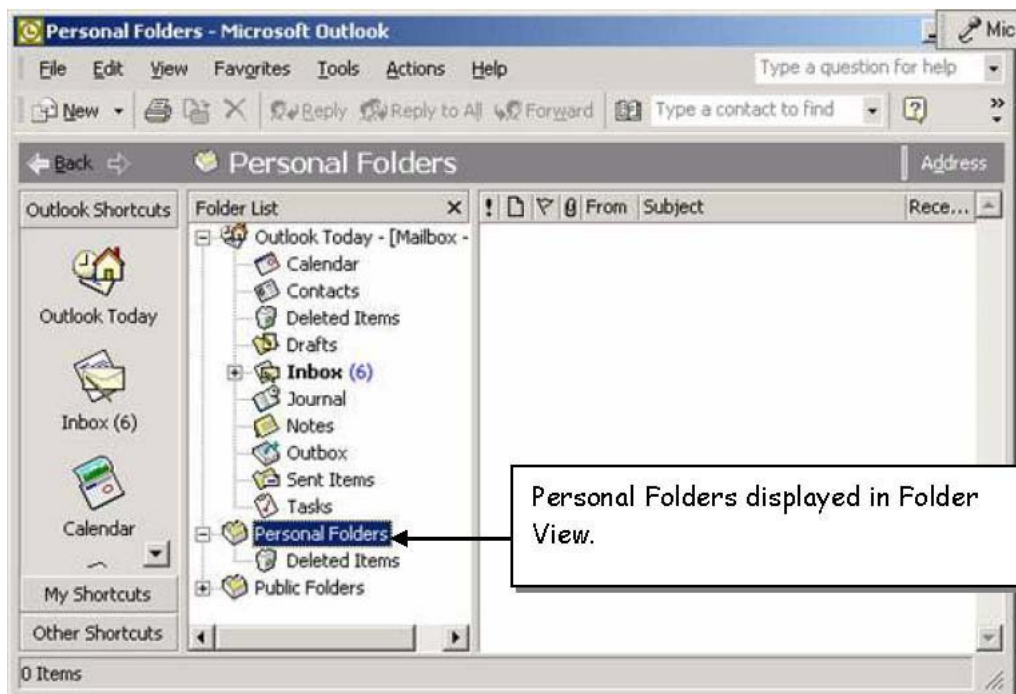
- In the File Name box, type a name for your personal folders, then click OK.



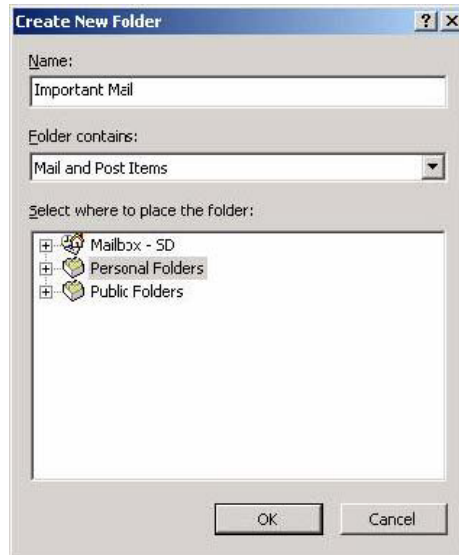
- Click OK at the next dialog box that displays.



You are returned to the Email Accounts screen. Click the Finish button. Your Personal Folders will now display in your Folder List.



Once you have created Personal Folders, you may create subfolders to categorize your mail. To create a subfolder, right click on "Personal Folders" and from the shortcut menu, select "New Folder". In the Create New Folder dialog box, name the folder. Make sure the "Folder contains" box indicates Mail and Post Items, and that Personal Folders is selected in the "Select Where to Place the Folder" box. Click OK.



Moving Mail to A Personal Folder

1. To move mail to a personal folder, select the message(s) you wish to move. You may Shift+Click to select a group of consecutive messages, or Control+Click to select multiple messages that are not consecutive.
2. With the message(s) selected, right click and select Move to Folder from the shortcut menu.
3. Select the appropriate personal folder from the list of folders that displays in the Move Items dialog box.

NOTE: You can also select the messages and drag them to the appropriate personal folder.

Working with Calendars

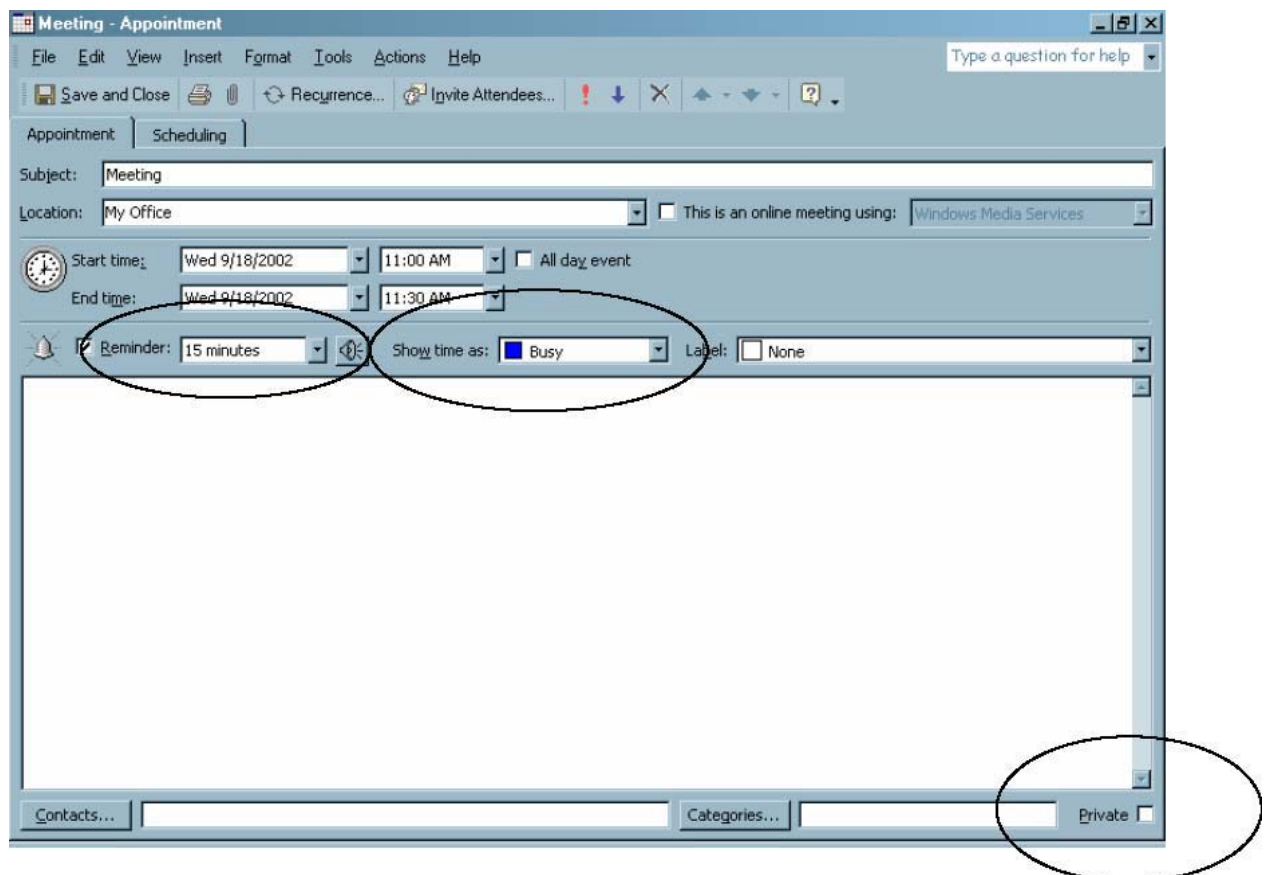
Viewing Your Calendar

To view your calendar, click the Calendar icon in the Outlook Navigation Pane.



Creating an Appointment

1. To schedule an appointment on your calendar, select File, New Appointment from the Outlook menu or double click any empty place on the calendar.
2. Complete the dialog box by entering a subject, location, etc. then click Save and Close. The appointment will display on your calendar.



NOTES

1. By default, all other University Outlook users can view your calendar. To make an appointment private, so that only you and those you authorize can view it, click the

- Private box on the appointment screen.
2. If the Reminder box is checked, a visual and audio reminder of your meeting will display/sound prior to the meeting.
 3. Use the Show Time As option to indicate whether you want the appointment to display as free time, busy time, tentative or out of office.

Creating a Recurring Appointment

1. To schedule a recurring appointment on your calendar, select File, New Appointment from the Outlook menu or double click an empty space on the Calendar screen.
2. Complete the dialog box by entering a subject, location, etc. then click the Recurrence button on the toolbar.
3. Select the frequency along with any additional options, then click OK.
4. Click Save and Close.

Appointment Recurrence

Appointment time
Start: 10:00 AM End: 10:30 AM Duration: 30 minutes

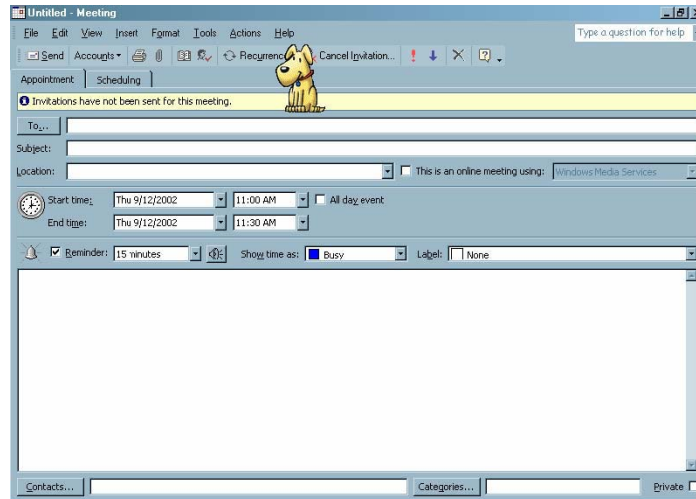
Recurrence pattern
 Daily Recur every 1 week(s) on:
 Weekly Sunday Monday Tuesday Wednesday
 Monthly Thursday Friday Saturday
 Yearly

Range of recurrence
Start: Wed 9/18/2002 No end date
 End after: 10 occurrences
 End by: Wed 11/20/2002

OK Cancel Remove Recurrence

Scheduling Group Meetings

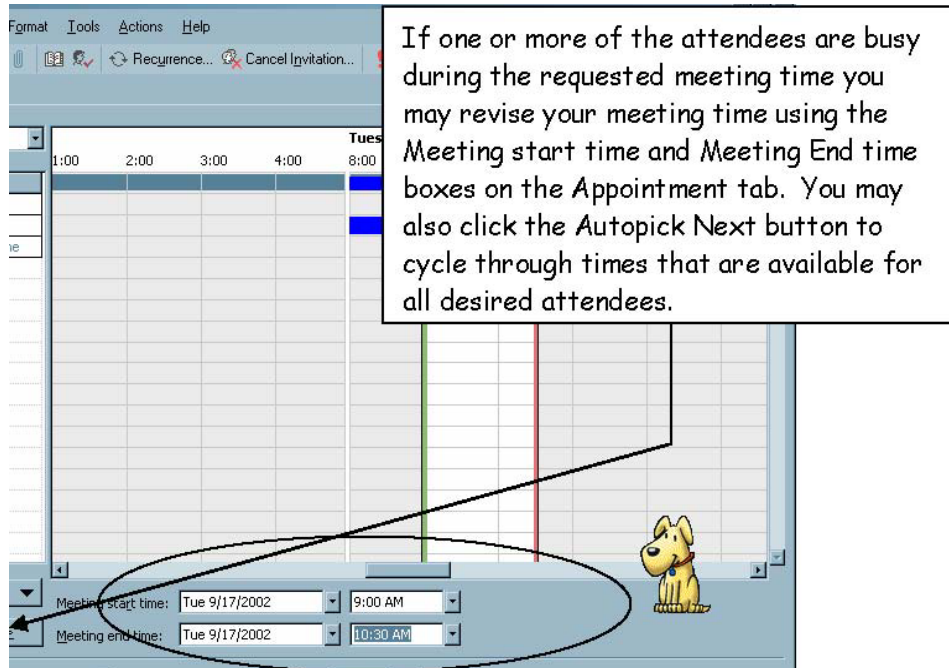
1. To schedule a meeting, select New, Meeting Request from the Outlook menu. The meeting request dialog box displays



2. Type a subject and location for the meeting, then select a desired start time and a desired end time for the meeting using the drop down fields.



3. The next step is to check to see whether your desired attendees are available for the meeting. To do this, click the Scheduling tab to display the scheduling dialog box. Because you are scheduling the meeting, your name and calendar information will display. Click the Add Others button, then select Add From Address Book. The global address list will display. Select the names of your desired attendees from the global address list (or use your personal address book if you wish). As you select each name, Outlook will indicate whether the individual is free or busy during the meeting time.



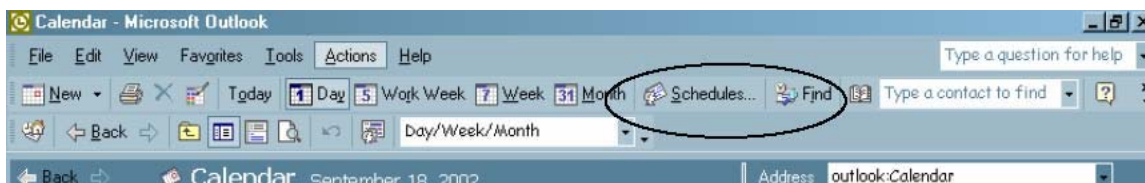
In this case user "SD" has scheduled a meeting with user "RBU". The calendar indicates that both individuals are free during the requested meeting time.

4. Click the Appointment screen, then click the Send button to email the meeting request. Once you do this, the meeting is automatically added to your calendar. Your desired attendees receive an email requesting that they accept or decline the meeting request. As they accept or decline, you are notified, and if they accept, the meeting is added to their calendars.

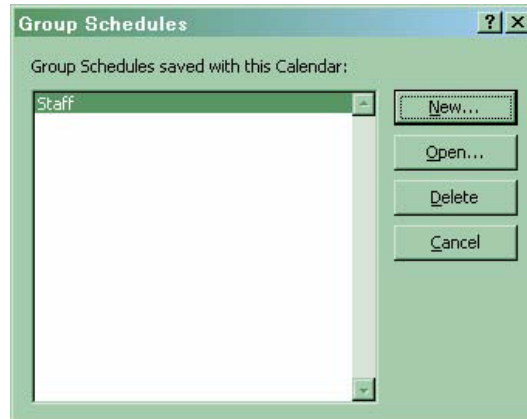
Creating a Group Calendar

If you frequently schedule meetings for the same group of individuals, you can create a group calendar to simplify the process.

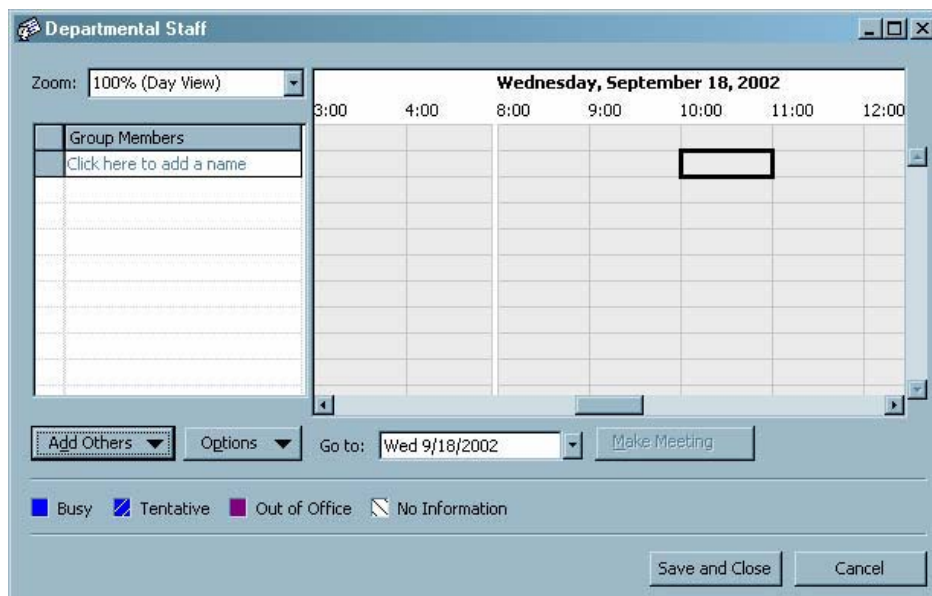
1. Make sure your calendar is displayed, then click the View Group Schedules button on the Outlook toolbar.



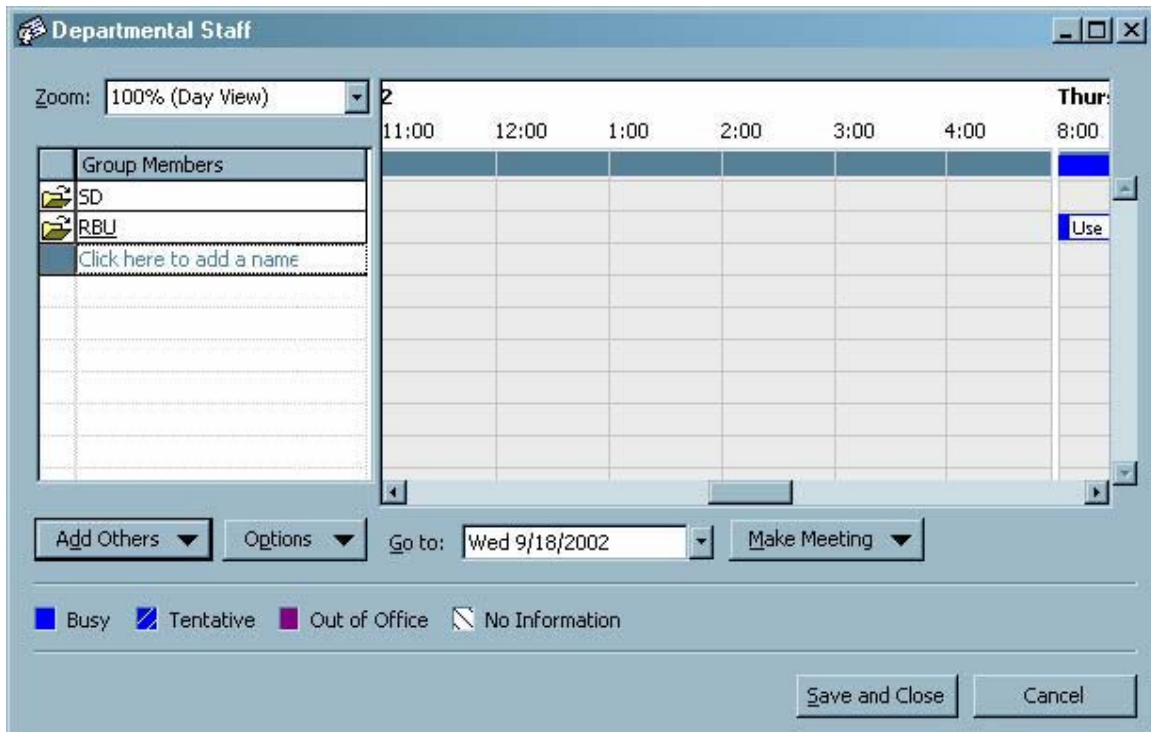
The Group Schedules dialog box displays.



2. To add a new group schedule, click the New button. Type a name for the group schedule, then click OK.



3. Click the Add Others button, then select Add From Address book. Browse to the desired address book, then select the name of the individuals you want to include in your group schedule. Click the To button to include them. Click OK. The names of the individuals in your group schedule now display as members of the group you just created.



4. Select Save and Close.
5. To schedule a meeting using the group schedule, click the Schedules button on the Outlook toolbar, select the desired group, then click Open. Click the Make Meeting button to schedule the meeting. Select New Meeting with All. Complete the meeting request form as you would for any other group meeting.