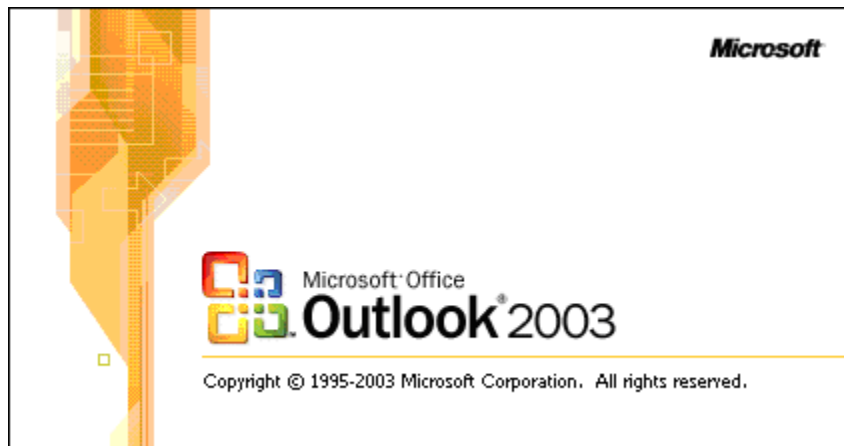


Outlook 2003



Last Revision Date: 03/28/07

For Assistance contact your Helpdesk

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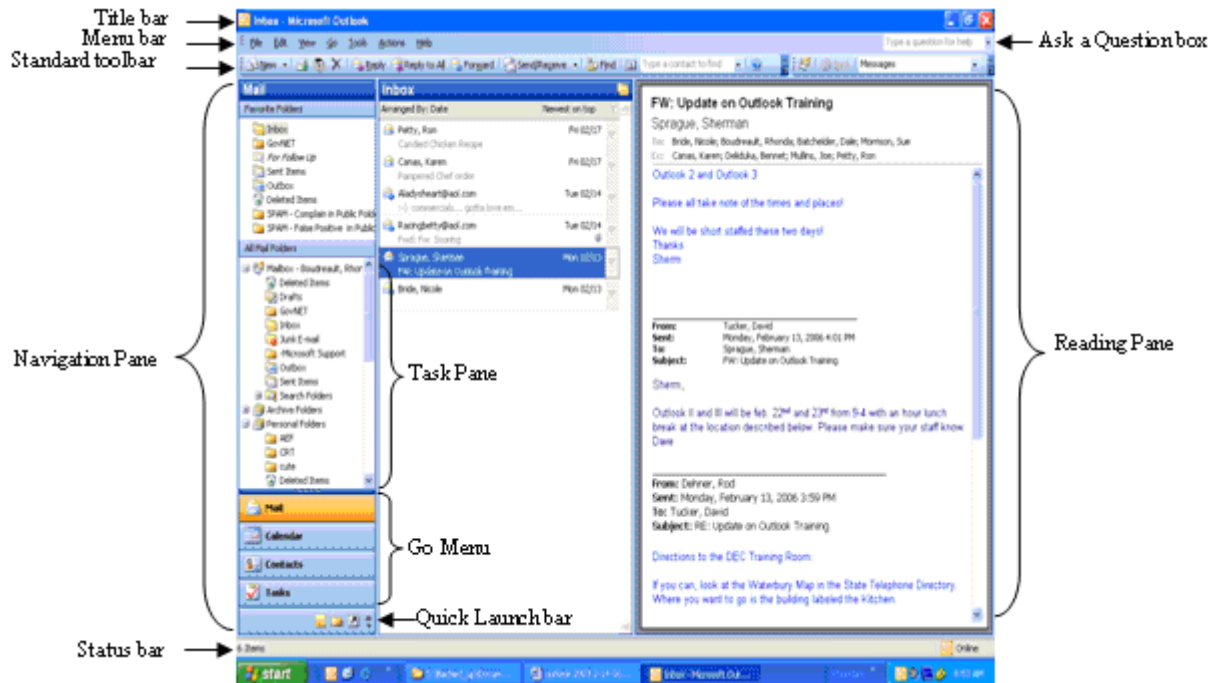
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Getting Started With Outlook

How to Open Outlook 2003

On the Windows taskbar, click Start -> All Programs -> Microsoft Office -> Microsoft Outlook 2003

Identifying the components of the Outlook environment:



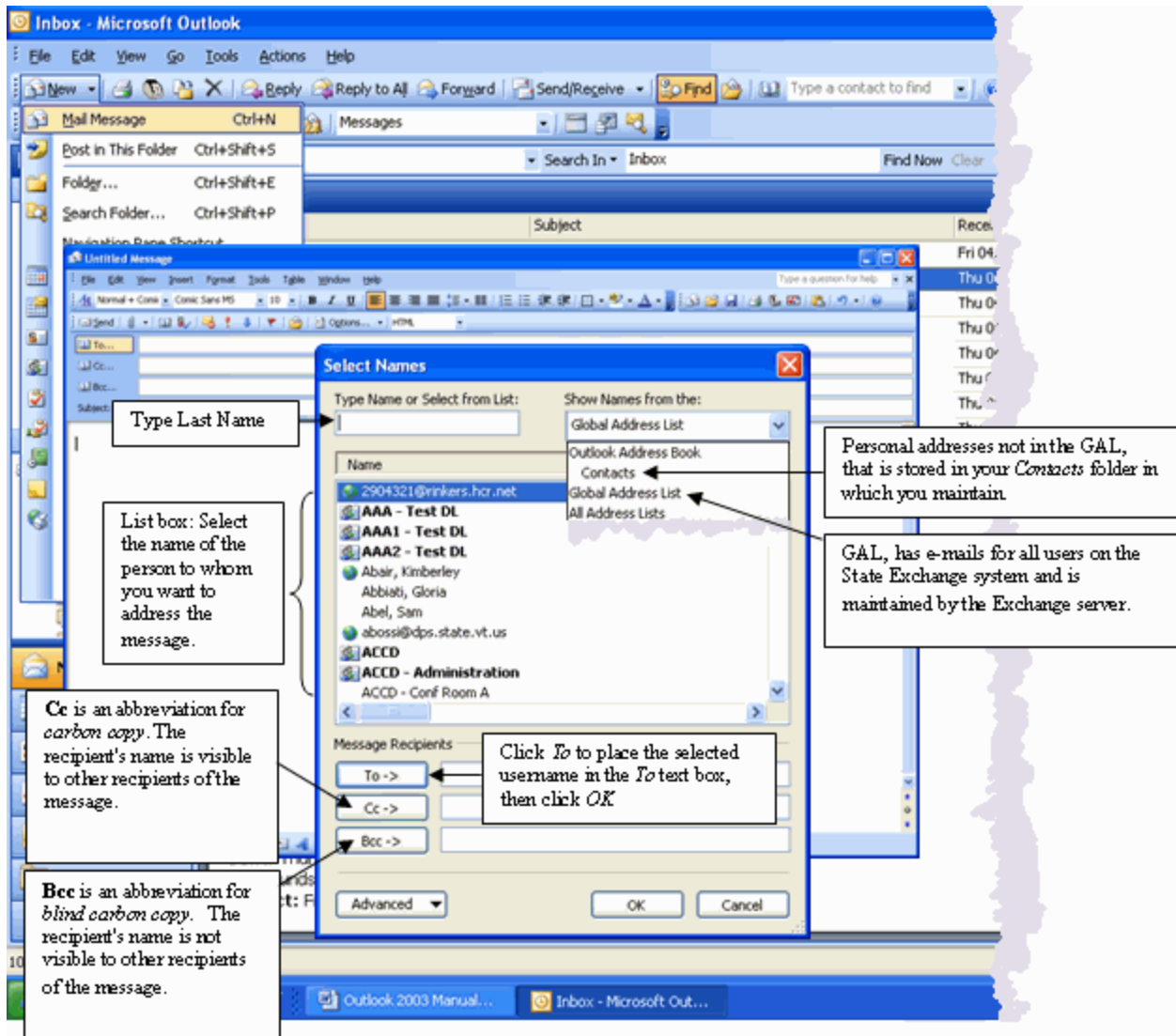
Title Bar	Displays the name of the current folder and the application
Menu Bar	Lists the menus
Ask a Question Box	Provides a place to enter questions
Standard Toolbar	Provides quick access to some of the most frequently used commands
Navigation Pane	The column on the left side of the window that provides access to all components of Outlook
Task Pane	Provides a window that you can use to access commonly used commands
Go Menu	Part of the Navigation pane that allows you to quickly switch between components
Quick Launch Bar	Part of the Navigation pane that provides quick access to frequently used components
Reading Pane	Displays the contents of the selected message without opening the message
Status Bar	Displays information about the active folder

Mail

Composing Messages

How to Compose and Send a Message

- On the *Standard Toolbar*, click *New -> Mail Message* to display the *New Message* dialog box.
- Click the *To* button to display the *Select Names* dialog box.
- In the *Show Names from the:* drop down list, select the *Address Book* you wish to search in.
- In the *Type Name or Select from List:* text box, type the **last** name of the recipient and click on *To*, *Cc*, or *Bcc* to select the name. Click *OK* to return to the *New Message* dialog box.
- Click in the Subject field and enter the subject of your choice.
- Press *Tab* to move to the message body text box and enter your message.
- On the *Standard Toolbar*, click *Send* to send the message.

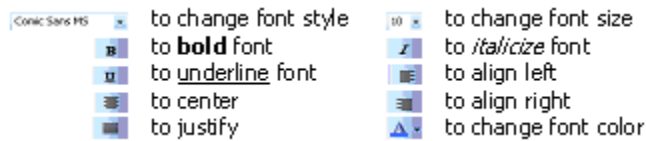


How to Format a Message

To format a message, select the text that you want to emphasize. To select all the message text, press Ctrl + A or choose *Edit -> Select All*.

On the *Standard Toolbar*, click the appropriate button.

The following is just an example of some of the options:



How to check the spelling and grammar in a message

To check the spelling and grammar of a message before you send it, choose Tools -> Spelling and Grammar, or press F7.

Correct any words that Outlook does not recognize by clicking:

- **Ignore Once** to skip the current occurrence of the word.
- **Ignore All** to skip all occurrences of the word.
- **Add to Dictionary** to keep the word unchanged and add the word to the user dictionary.
- **Change** after you change the spelling of the word by either entering a different spelling or selecting a word from the Suggestion list.
- **Change All** to change the spelling of all instances of the same word.

Click *OK* to close the message box.

How to Attach a File to a Message

While in a new mail message, on the *E-mail Toolbar*, click the *Insert File* button . Once the *Insert File* dialog box is displayed, select the file you want to attach and:

- Double-click the file to attach it.
- Or
- Click *Insert* to attach it.

NOTE: The recipient must have the same or similar application in which the attachment was created in order to open it.

NOTE: If the size of your attachment is large, it will take up a lot of space and may delay the opening of the attachment of the item to which it is attached.

How to Open a Message

In the *Inbox*, you can either double-click the message you want to open or select the message you want to open and press Enter.

Message symbols: Each message in your *Inbox* displays with one or more message symbols next to it. The symbols represent the type or status of the message:



How to Reply to a Message

To reply to a message, you can either open it and click on *Reply* or you can simply highlight the message and click *Reply* on the *Standard Toolbar*.

- In the message text box, enter the text of the message.
- Click *Send* to send the message.

Reply options

- Use the *Reply* option to send a response to the sender of the message.
- Use the *Reply To All* option to send a response to the sender and copies of the response to anyone who received the original message.
- Use the *Forward* option to forward a copy of the message to someone who did not receive the original message.

How to Forward a Message

- Open the message you want to forward.
- On the *Standard Toolbar*, click the *Forward* button. A new Message is displayed.
- Address the message to the appropriate recipient, type a message, if desired, and click *Send*.
- Close the original message.

How to Recall a Message

- Display the contents of the Sent Items folder
- Open the message you want to recall
- Choose Actions -> Recall This Message
- In the Recall This Message dialog box, verify that "Delete Unread Copies of This Message" is selected
- Click *OK*

NOTE: You **cannot** recall or take back a sent message if:

- The recipient has opened it.
- It has been moved from the *Inbox*.
- The recipient is not logged into Outlook.
- The recipient is outside of our Exchange System.

Managing Mail

How to Open an Attachment

- Open the message that contains the attachment you want to open.
- On the *Attachments* line of the Message form, double-click the name of the attachment.

NOTE: See *How to Save Your Attachments* under the *How to Cleanup and Decrease the Size of Your Mailbox* section.

How to Print a Message

- To print an open message, choose *File -> Print* to display the *Print* dialog box.

NOTE: You do not have to open the message to print it. Simply select the message in the *Inbox* and, on the *Standard Toolbar*, click *Print*.

How to Delete a Message

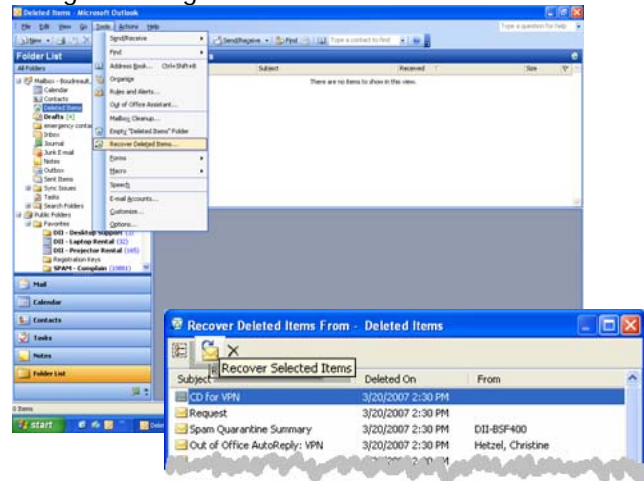
- With the message selected or opened that you want to delete, click the Delete button.

How to Recover a Deleted Message

- If you need to recover a recently deleted item, drag it from the *Deleted Items* folder to any other folder or choose edit from the menu bar and choose *Undo Delete*.

NOTE: This option only works immediately after deleting a message.

- If you need to recover a deleted item that is no longer in your *Deleted Items* folder;
 - In *All Folders*, click once on the *Deleted Items* folder to select it.
 - On the *Standard Toolbar*, click *Tools -> Recover Deleted Items...* to display the *Recover Deleted Items From - Deleted Items* dialog box.
 - Choose the item or items you want to recover and choose the recover icon. The item will then reappear in your *Deleted Items* folder.



How to Flag a Message

- Right-click on the message you want to flag and choose *Follow Up -> Add Reminder* to display the *Flag for Follow Up* dialog box.

NOTE: In an open message, you can click the *Follow Up* button on the *Standard Toolbar*.

- Click the *Due By* drop-down arrow. A pop-up calendar is displayed.
- Select the date on which you need to follow up.
- Click *OK*.

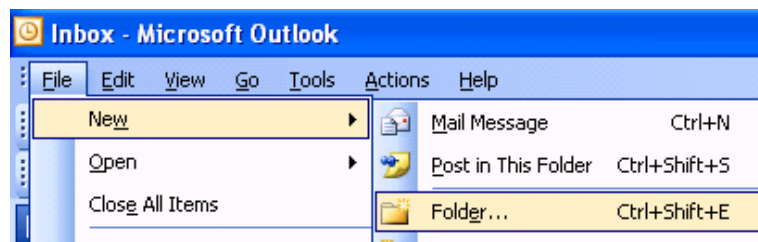
NOTE: When a flagged message is due for follow-up, the text in the message header will change from black to red.

How to Mark a Message Unread


- In the *Inbox*, either select or open the message you want to mark as unread.
- Choose *Edit -> Mark as Unread*.

How to Create a Folder


- On the *Menu bar*, click *File -> New -> Folder*, to display the *Create New Folder* dialog box.
- Enter a name for your folder.
- Select the location where you want to create the folder.
- Click *OK*.



How to Delete a Folder

- In the *All Mail Folders* pane, select the folder you want to delete.
- On the *Standard Toolbar*, click the *Delete* button .
- In the message box, click *Yes* to confirm the deletion of the folder.

How to Move Messages to a Folder

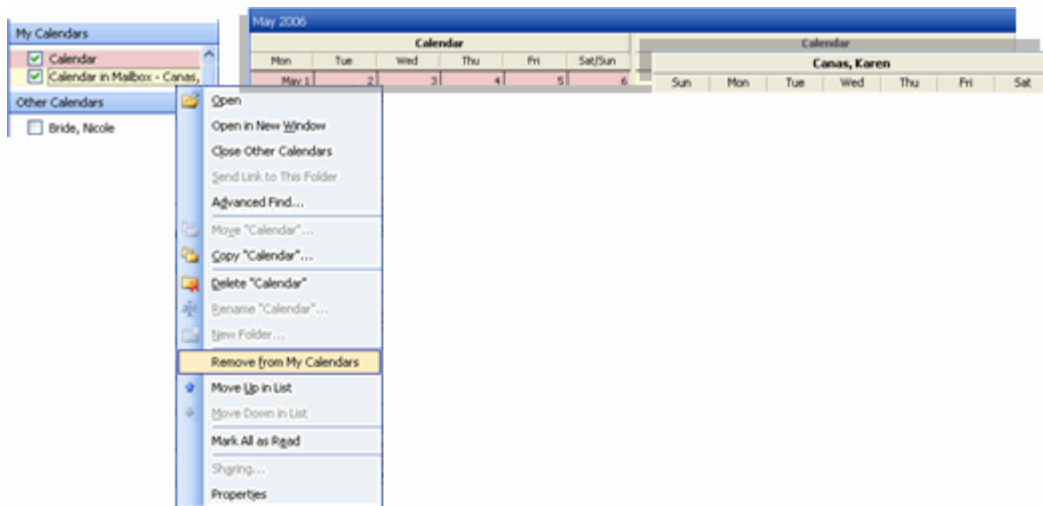
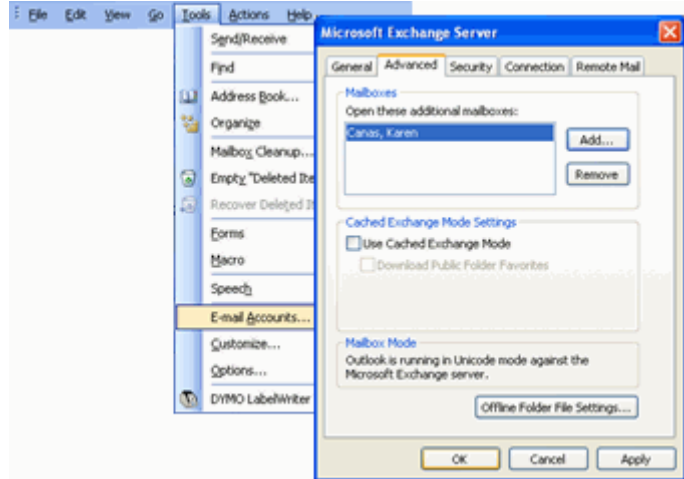
- Select the message you want to move.
- On the *Standard Toolbar*, click the *Move to Folder* button .
- Select the folder to which you want to move the message.

How to Copy Messages to a Folder

- Select the message you want to copy.
- Choose *Edit -> Copy*.
- Select the folder to which you want to copy the message.
- Choose *Edit -> Paste*.

How to Add another User's Mailbox

- From the *Menu* bar, click *Tools -> E-mail Accounts* to display the *E-mail Accounts* dialog box.
- Check *View or change existing e-mail accounts -> Next*.
- Click on the *Change* button to display the *E-mail Accounts, Exchange Server Settings* dialog box.
- Click on the *More Settings* button to display the *Microsoft Exchange Server* dialog box.
- On the *Advanced* tab, click on the *Add* button to display the *Add Mailbox* dialog box.
- In the *Add Mailbox* text box, type the last name of the user you wish to add.
- Click *OK* to close the *Add Mailbox* dialog box, *OK, Next* and *Finish* closing the remaining dialog boxes.

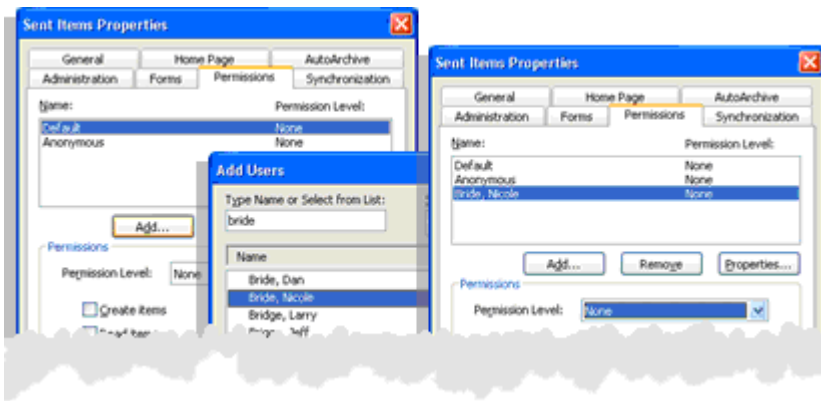
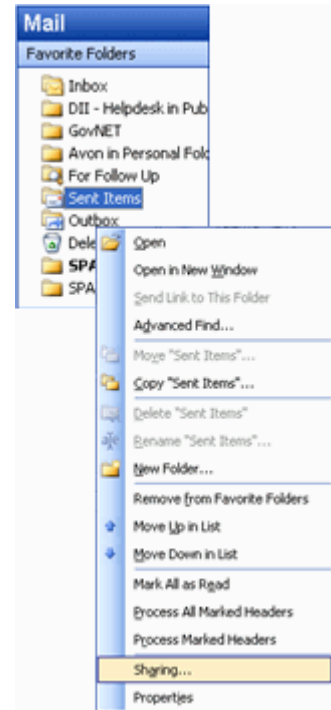


NOTE: The calendar of the user you just added will appear in My Calendars. You will need to remove it or the name above it will be "Calendar" instead of the user's name. To remove it, from the Navigation Pane under My Calendars, right click on the user's calendar that you just created and choose Remove from My Calendars.

NOTE: See How to Add/Open Other Users' Calendars under the Calendars section to add the user's calendar to your Other Calendars.

How to grant permissions to your Outlook files

- From within the *Mail Folders*, right click on the folder you wish to grant permissions to.
- From the pop-up menu, choose *Sharing* to display the *Folder Items Properties* dialog box.
- On the *Permissions* tab, click the *Add* button to display the *Add Users* dialog box.
- In the *Type Name or Select from List* text box, type the *Last* name of the user you wish to grant permissions to, click the *Add* button, then click *OK*.
- The name of the user you just granted permissions to will now appear in the *Name* and *Permission Level* section.
- With the username you just granted *Permissions* to highlighted, in the *Permissions* section, choose one of the *Permission Levels*. (see table below)



With this permission level:	You can
Owner	Create, read, modify, and delete all items and files, and create subfolders. As the folder owner, you can change the permission levels others have for the folder. (Does not apply to delegates.)
Publishing Editor	Create, read, modify, and delete all items and files, and create subfolders. (Does not apply to delegates.)
Editor	Create, read, modify, and delete all items and files.
Publishing Author	Create and read items and files, create subfolders, and modify and delete items and files you create. (Does not apply to delegates.)
Author	Create and read items and files, and modify and delete items and files you create.
Contributor	Create items and files only. The contents of the folder do not appear. (Does not apply to delegates.)
Reviewer	Read items and files only.
Custom	Perform activities defined by the folder owner. (Does not apply to delegates.)
None	You have no permission. You can't open the folder.

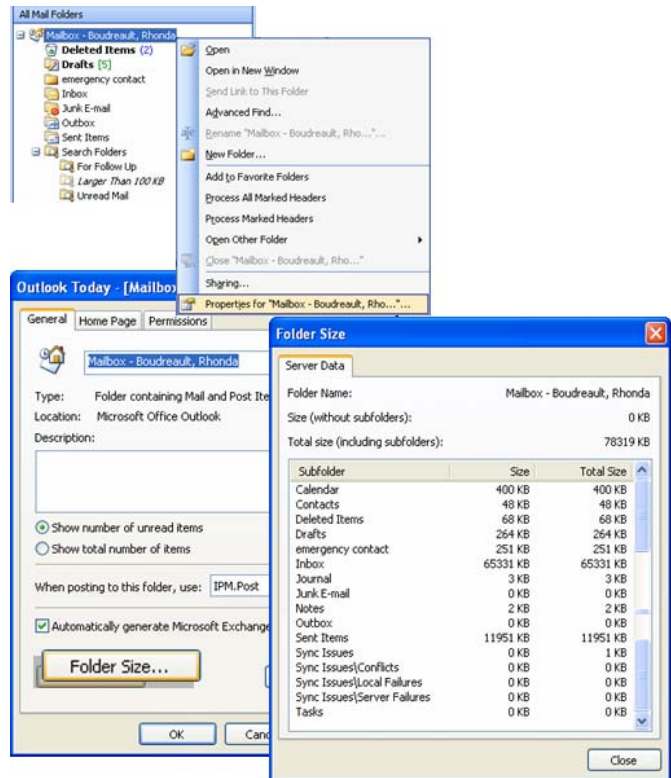
NOTE: Click *Apply* and *OK* to close the *Folder Items Properties* dialog box.

How to Clean up and Decreased the Size of Your Mailbox

Your mailbox is established with 50MG. Additional storage space is approved and allocated by department per agreement in 30MG increments.

How to check the sizes of your folders

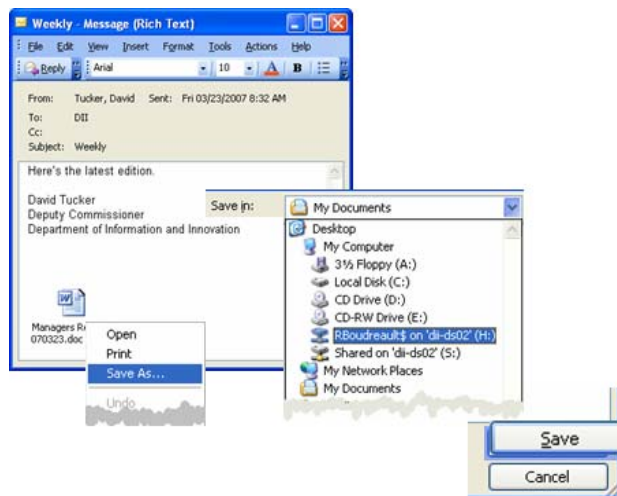
- From *All Mail Folders*, right click on "Mailbox – username".
- From the pop-up menu, choose *Properties for "Mailbox – Username..."* to display the *Outlook Today* dialog box.
- On the *General* tab, click the *Folder Size* button to display the *Folder Size* dialog box.
- When finished viewing, click *Close* to close the *Folder Size* dialog box.
- Click *OK* to close the *Outlook Today* dialog box.



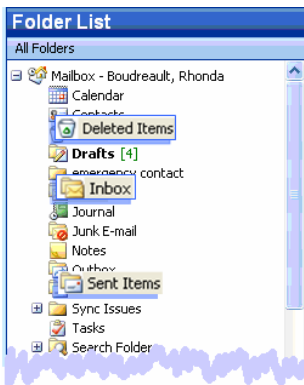
How to save your attachments

It is not necessary to keep an item just because it has an attachment you want to keep. Attachments take up unnecessary space in your mailbox. It is recommended you save your attachments to your user drive to free up space in your mailbox. To save attachments;

- Open the message that contains the attachment you want to save.
- Right click on the attachment and choose *Save As* from the pop-up menu to display the *Save Attachment* dialog box.
- From the *Save in* drop-down box, choose your personal drive or any location of your choice.
- Click *Save*
- Delete the message.

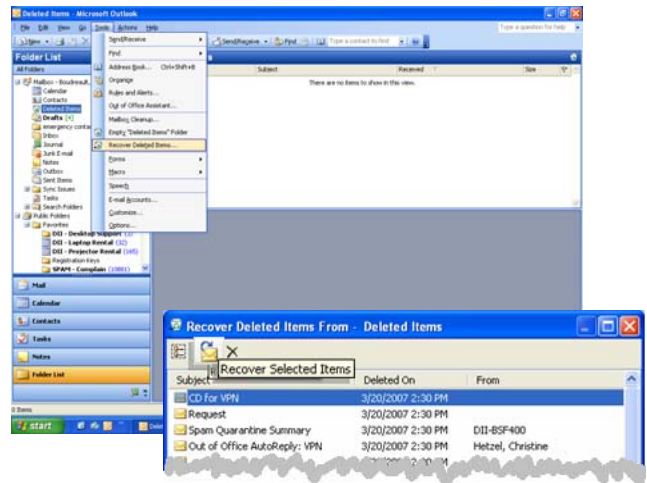


Folder Cleanup



- Delete any items from your *Inbox* folder that are no longer needed.
- Delete any items from your *Sent Items* folder that are no longer needed.
 - HINT:* It is recommended you clean out your *sent items* at least once a month.
- Right click on your *Deleted Items* folder and choose *Empty "Deleted Items" Folder*.
 - If you need to recover a recently deleted item, drag it from the *Deleted Items* folder to any other folder or choose edit from the menu bar and choose *Undo Delete*.
 - If you need to recover a deleted item that is no longer in your *Deleted Items* folder;

- In *All Folders*, click once on the *Deleted Items* folder to select it.
- On the *Standard Toolbar*, click *Tools -> Recover Deleted Items...* to display the *Recover Deleted Items From - Deleted Items* dialog box
- Choose the item or items you want to recover and choose the recover icon. The item will then reappear in your *Deleted Items* folder.

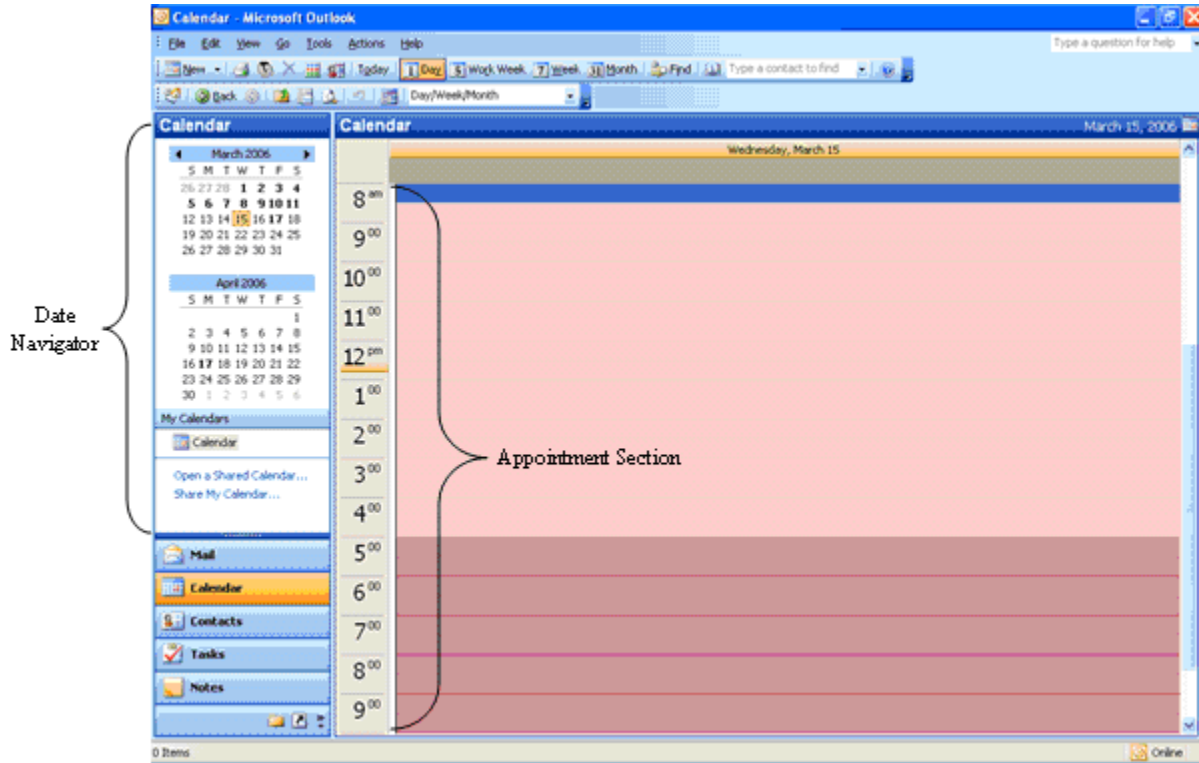


Calendar

Overview of the Outlook Calendar

The *Outlook Calendar* consists of two main components:





- Appointment Section
- Date Navigator



Calendar Entries

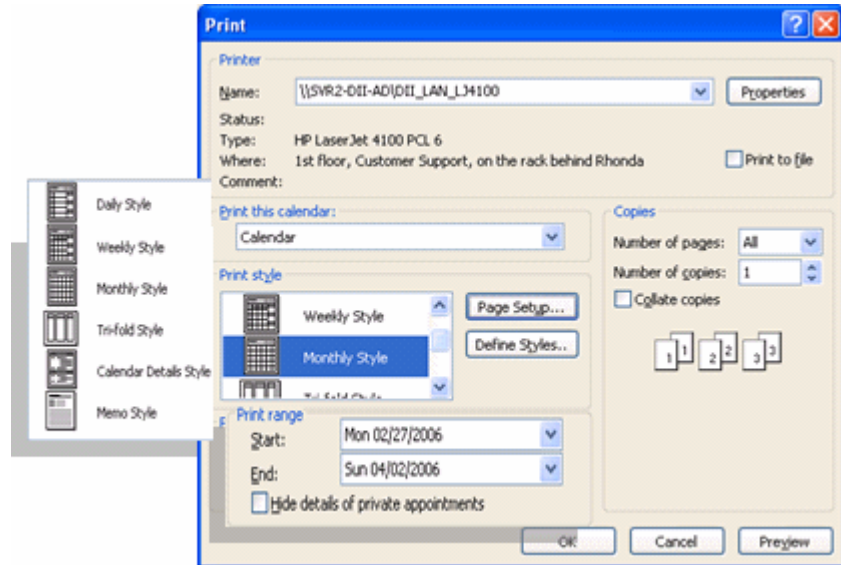
Appointment	Reserve a time slot once for a designated purpose
Recurring Appointment	Reserve a time slot more than once for a designated purpose
Event	Reserve a specific day or group of days for a designated purpose
Meeting Request	Reserve a time slot once for a designated purpose involving other participants
Recurring Meeting Requests	Reserve a time slot more than once for a designated purpose involving other participants

Calendar Views

Day	A detailed schedule for one day, divided in hourly time slots
Work Week	The five work days (Monday through Friday) divided in hourly time slots
Week	The entire week (Sunday through Saturday) where each day is represented by a box with no time slots
Month	An entire month with no time slots
	This appointment has a reminder.
	This is a recurring appointment.
	This is a meeting that involves multiple participants.
	This is a private appointment.

How to Print the Calendar

- With the *Calendar* open, on the *Standard Toolbar*, click the *Print* button to display the *Print* dialog box
- From the *Print Style* list box, select a print style for your calendar
- In the *Print Range* box, specify the start date to designate the start time that you want printed
- In the *Print Range* box, specify the end date to designate the end time that you want printed
- If desired, click *Preview* to display *Print Preview*, then click *Print* to return to the *Print* dialog box
- Click *OK* to print the *Calendar*



Scheduling Meetings and Appointments

How to Schedule Meetings and Appointments

- On the *Standard Toolbar*, click *New -> Appointment* button (for a meeting, click *New -> Meeting Request*) to display a new meeting/appointment.
- In the *Subject* field, enter a subject of your choice.
- Press *Tab* to move to the *Location* field.
- In the *Location* field, enter a location of your choice.
- From the *Start Time* drop-down list, select the appropriate starting time of the meeting/appointment.
- From the *End Time* drop-down list, select the appropriate ending time of the meeting/appointment.
- If this is an all day meeting/appointment, check the *All day event* check box.
- If this is a recurring meeting/appointment, click the *Recurrence* button to display the *Appointment Recurrence* dialog box.
 - Select your choices in the *Recurrence Pattern*, and *Range of Recurrence* sections, and click *OK*.
- Click *Save and Close* to save the meeting/appointment.

NOTE: By default, scheduled meetings/appointments have a reminder of 15 minutes.

How to Reply to a Meeting Request

To accept or decline a meeting request:

- In the *Inbox*, open the meeting request message.
- If desired, on the *Standard Toolbar*, click *Calendar* to check your calendar.
- If necessary, click the *Close* button to close the *Calendar*
 - To accept the meeting request
 - On the *Standard Toolbar*, click *Accept*.
 - In the message box, click *OK* to send the response.
 - You can send with or without a response
 - To decline the meeting request
 - On the *Standard Toolbar*, click *Decline*. A message box is displayed.
 - Click *OK* to edit the response before sending.
 - In the message area of the response form, type a response.
 - Click *OK*
- Click *Send* to send the meeting request.

How to Propose a New Meeting Time

- In the *Inbox*, open the meeting request message.
- On the *Standard Toolbar*, click *Propose New Time* to display the Propose New Time dialog box.
- From the Meeting Start Time drop-down list, select a new time.
- Click *Propose Time*.
- In the message text box, enter a response.
- Click *Send* to send the new proposed time.

How to Track Meeting Responses

- Display the *Calendar*
- Display the date on which the meeting is scheduled
- Double-click the meetings to open it
- Select the *Tracking* tab to see the status of the attendants' responses.
- Click the *Close* button to close the Meeting.

How to Edit/Update Existing Calendar Entries

To edit appointments

- Open the meeting request/appointment that you want to edit.
- Make the appropriate changes.
- Click *Save and Close* to save the appointment.

NOTE: The organizer should be the one who changes the time so everyone will be notified.

To cancel or delete an appointment

- Open the meeting request/appointment that you want to cancel/delete.
- On the *Standard Toolbar*, click *Delete*. A message box is displayed. The option to send a cancellation message and delete the meeting is selected, click *OK*.
- The meeting box will reappear. If desired, enter a message.
- Click *Send* to send the cancellation notice.

NOTE: You can also delete a meeting without sending a cancellation message.

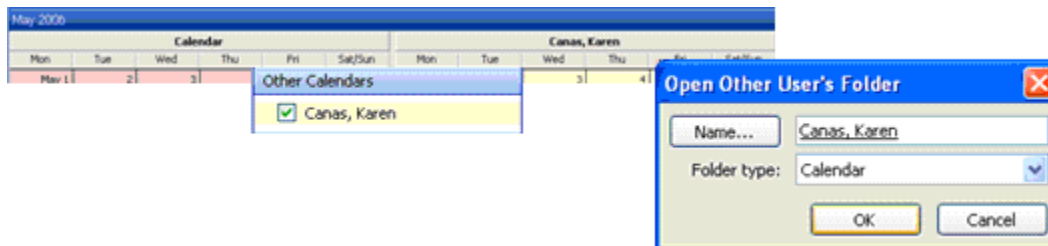
To assign a category to an appointment

- At the bottom of the appointment, click *Categories* to display the *Categories* dialog box.
- Choose the category and click *OK*.
- Click *Save and Close* to save the appointment.

How to Add/Open Other Users' Calendars

NOTE: The calendar owner must give you permissions to their calendar before you can view it.

- From the *Menu* bar, click *File -> Open -> Other User's Folder* to display the *Open Other User's Folder* dialog box.
- Type last name of user and hit the *Name* button to choose the correct user.
- Hit the *OK* button.
- The user's calendar will appear to the right of yours with their name displayed at the top.



NOTE: To turn off their calendar, uncheck the check box next to their name.

Contacts Managing Contacts

How to Add a Contact

- On the *Standard Toolbar*, click *New -> Contact* to display a new contact.
- Enter the desired information in the appropriate text boxes
- Click *Save and Close*.

How to Edit a Contact

To edit contacts

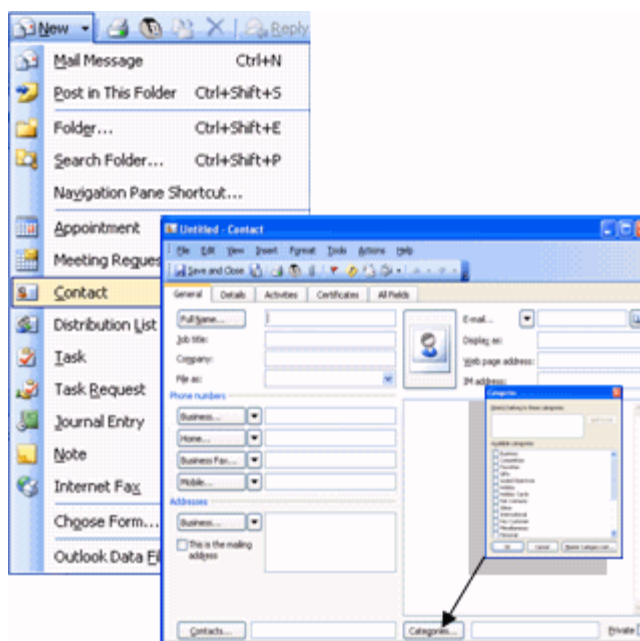
- Open the *Contact* that you want to edit.
- Make the appropriate changes.
- Click *Save and Close* to save the *Contact*.

To delete a contact

- Right click on the *Contact* that you want to delete and choose *delete*.

To assign a category to a contact

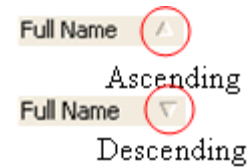
- At the bottom of the contact, click *Categories* to display the *Categories* dialog box.
- Choose the category and click *OK*.
- Click *Save and Close* to save the *Contact*.



How to Sort Contacts

Full Name	Home Phone	Mobile Phone	Business Phone	Company	Business Fax	Journal	Categories
-----------	------------	--------------	----------------	---------	--------------	---------	------------

Click on any column header to sort by that header title. A small triangle to the right of the column name indicates that the list has been sorted by that column in a particular order.



Click on the column header a second time to sort that column in reverse order.

How to Find a Contact

- In the *Menu bar*, go to *Tools -> Find -> Find*.
- Type a contact to find in the text box.
- Type the name, company name or other text on which you are going to search.
- Press *Enter* to display any contacts that match the word(s) you entered.
 - By default, Outlook only searches for particular names:

First or last names	E-mail addresses
Display as Names	Company Names

Type a contact to find

How to Print a List of Contacts

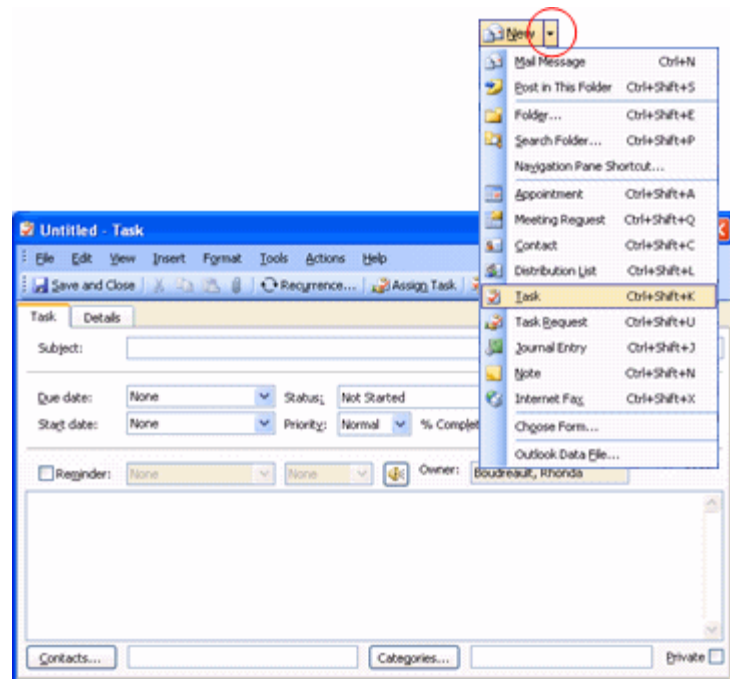
- On the *Standard Toolbar*, click the *Print* button to display the *Print* dialog box.
- Select a print style.
- Click *OK* to print the contacts.

Tasks

Managing Tasks

How to Create a Task

- On the *Standard Toolbar*, click *New* and choose *Task*.
- Enter a subject in the *Subject* text box.
- From the *Due Date* pop-up calendar, select the date when the task is due.
- If necessary, from the *Priority* drop-down list, select a priority.
- If necessary, from the *Reminder* pop-up calendar, select a date when you want to be reminded of the task.
- On the *Standard Toolbar*, click *Save and Close*.



How to Edit a Task

NOTE: To Edit is to make changes or corrections to the Task.

- If necessary, display the *Tasks* list.
- Open the task you want to edit.
- Make the appropriate changes to the *Task*.
- Click *Save and Close*.

How to Update a Task

NOTE: To Update is to track progress of the Task.

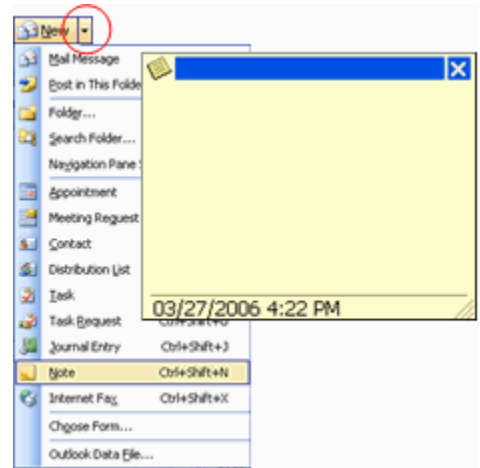
- If necessary, display the *Tasks* list.
- In the *Complete* column, check the check box of the task you have completed. The task is marked as completed and is crossed off.

Tasks					
Subject	Status	Due Date	% Complete	Categories	
Click here to add a new Task					
Contact-caterers	Completed	None	100%		<input checked="" type="checkbox"/>
Reserve Conference Room for Lunch	Not Started	Tue 03/28/2006	0%		<input type="checkbox"/>
Reserve laptop and projector	Not Started	Tue 03/28/2006	0%		<input type="checkbox"/>

Notes Using Notes

How to Create a Note

- On the *Standard Toolbar*, click *New* and choose *Notes*.
- Enter the contents of the note.
- If necessary, assign the note to a category.
 - Click the *Note* icon and choose *Categories* to display the *Categories* dialog box.
 - From the *Available Categories* list box, check the category to which you want to assign the note.
 - Click *OK*
- Click the *Close* button to close the note.



How to Edit a Note

- If necessary, display the *Notes* folder.
- Open the note you want to edit.
- Edit the contents of the note as desired.
- Close the note.

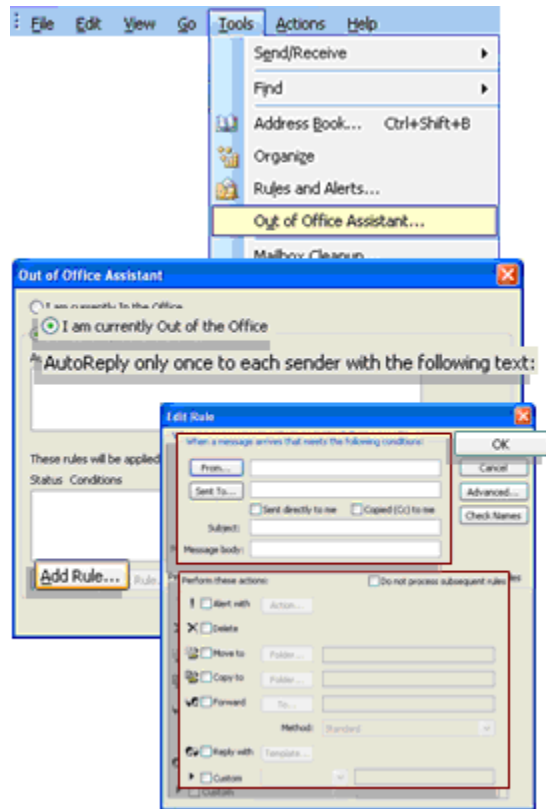
How to Copy a Note

- If necessary, display the *Notes* folder.
- Adjust the size of the Outlook window so that the desktop is visible.
- Drag the note you want to copy to the desktop.
 - You can also copy or move a note to a folder.

Out of the Office Assistant

How to Notify Others That You Will Be Out of the Office

- On the *Standard Toolbar*, choose *Tools -> Out Of Office Assistant* to display the *Out of Office Assistant* dialog box.
- In the *Out of Office Assistant* dialog box, check the *I Am Currently Out of the Office* check box.
- In the *AutoReply only once to each sender with the following text:* text box, type the message that you want people to receive.
- Click *Add Rule* to open the *Edit Rule* dialog box.
- In the *When a message arrives that meets the following conditions* section, specify the conditions to be met.
- In the *Perform these actions* section, specify what Outlook should do with messages that meet the conditions.
 - You can check more than one check box.
- Click *OK* to close the *Edit Rule* dialog box.
- Click *OK* to close the *Out of Office Assistant* dialog box.



NOTE: When you return to the office, don't forget to turn off the **Out of Office Assistant** otherwise, Outlook will continue to automatically reply to your incoming messages.

Glossary

Address Book

An *Address Book* is a collection of address books or address lists that you can use to find and select e-mail addresses and distribution lists to quickly address messages. In Exchange, the main address book is called the Global Address List, (GAL) and has e-mail addresses for all users on the State Exchange system.

Attachment

An *Attachment* is a copy of any type of file or an Outlook item that you can add to an Outlook item and then separate from the Outlook item.

Contact

A *Contact* is a person with whom you communicate on a business or personal level and whose information is stored in the *Contacts Folder*.

E-mail

E-mail a method of composing, sending, and receiving messages over electronic communication systems.

Folder

A *Folder* is a tool that you can use to store and organize Outlook items. In the Outlook environment, there are several main components that you can use to communicate with others. These components are folders, listed below:

- Inbox – where you send and receive messages.
- Calendar – where you schedule appointments, meetings and events.
- Contacts – where you enter and track business and personal contacts.
- Task List – where you create and manage tasks.
- Notes – where you quickly record reminders.
- Deleted Items – stores any items that you delete in Outlook
- Drafts – stores copies of unfinished messages you can complete and send at a later time.
- Sent Items – stores copies of messages you send to others.

Help

While you are using Outlook, you can use the following resources if you need help:

- Type a question for help box located on the Menu bar.
- Microsoft Outlook Help task pane, which you can display by choosing Help -> Microsoft Outlook Help.

Item

An *Item* is a basic element created in Outlook that holds information and is stored in a specific location. Items in Outlook include:

- Messages
- Appointments
- Meetings
- Contacts
- Tasks
- Notes

Meeting Resources

A *meeting resource* is an item with its own e-mail account on the Microsoft Exchange Server that you can schedule for a meeting, and it will automatically accept or reject meeting invitations.

Note

A *Note* is the electronic equivalent of paper sticky notes that you can leave open on the screen while you work.

Task

A *Task* is an assigned piece of work that you do regularly or just once that must be completed within a certain time frame. Tasks can also be assigned to other people.