Microsoft Outlook XP
Intermediate
Inbox and E-mail Management

Student Manual

Prepared especially for:
Philadelphia Gas Works

Duplication is prohibited without the written consent of The Abreon Group.

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Chapter 1

Working with Messages

Chapter Objectives:

- Setting Message Options
- Setting Message Importance
- Setting Message Sensitivity
- Working with Voting Buttons
- Using Message Tracking Options
- Redirecting Replies to a Message
- Designating an Alternate Sent Item Folder
- Using Message Delivery Options
- Associating a Message with Other Outlook Items
- Finding and Searching for Messages
- Resending a Message
- Flagging a Message
- Recalling a Message
- Saving an Incomplete Message
- Working with Signatures

Chapter 1 – Working with Messages

Overview

While the primary purpose of the Inbox is to send and receive messages, there are many powerful features that make Outlook more than just a glorified mailbox. These features give the user real power in managing and working with their e-mail messages.

This chapter will focus on the features that can make working with e-mail a lot easier, and greatly enhance the appearance and ease with which e-mails are created, including signatures, voting buttons, flagging, and send and receive features.

Setting Message Options

There are several options that can be set for a message before it is sent. For example, a message can be sent with high importance, marked as confidential, or marked to be delivered at a specific time.

The following procedure explains how to access the **Message Options** dialog box. The individual sections that follow go into detail about each of the options offered.

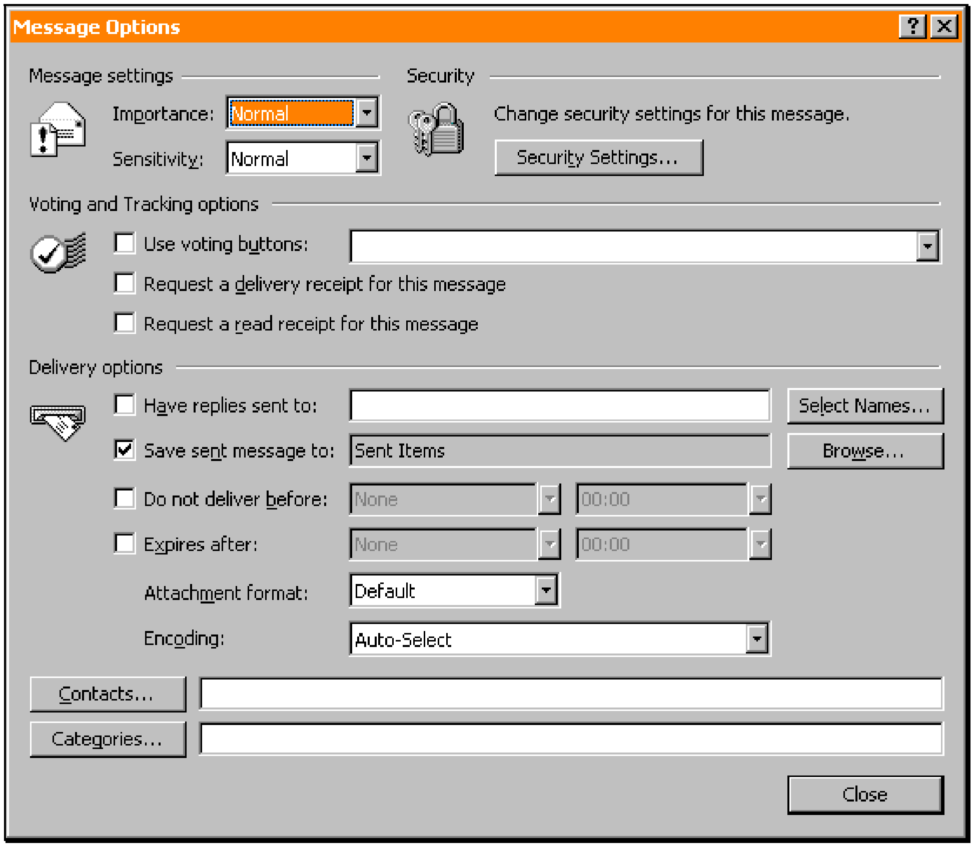
Procedure:

1. Create a new message.
2.

Click the **Options** button on the **Standard** toolbar of the message.

OR

From the **View** menu of the message, select **Options**. The **Message Options** dialog box displays:



Message Options
Message settings
Security
Change security settings for this message.
Security Settings...
Voting and Tracking options
Delivery options
Select Names...
Browse...
Contacts...
Categories...
Close

Importance: Normal

Sensitivity: Normal

☐ Use voting buttons:

☐ Request a delivery receipt for this message

☐ Request a read receipt for this message

☐ Have replies sent to:

☑ Save sent message to: Sent Items

☐ Do not deliver before: None 00:00

☐ Expires after: None 00:00

Attachment format: Default

Encoding: Auto-Select

3. Select the desired options and click **Close** to return to the message.

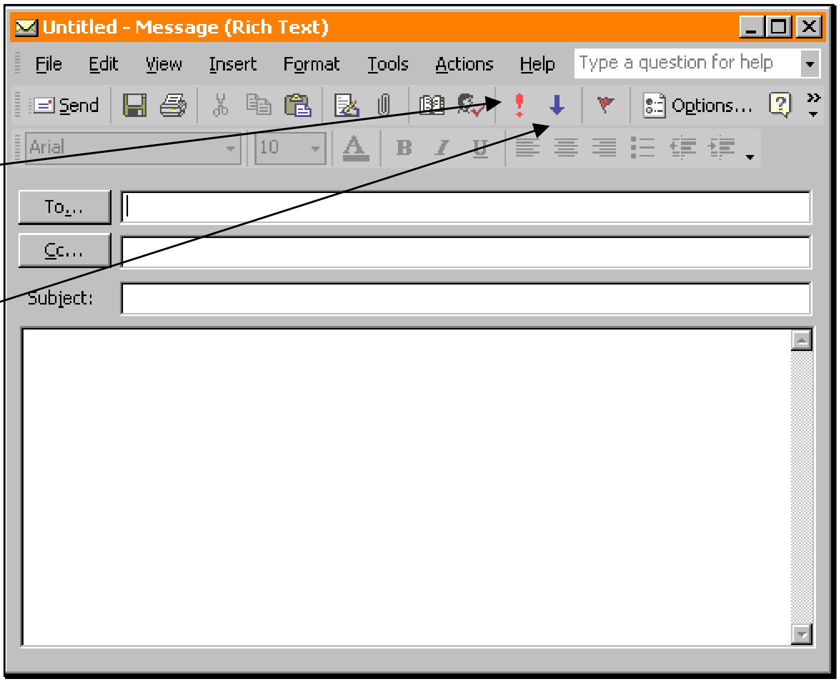
Setting Message Importance

The **Message Settings** section of the **Message Options** dialog box determines two things – the importance of the message, and the sensitivity of the message.

The first option is **Importance**. There are three choices in this drop-down list. The following table explains the available options:

Option	Description
High	The message will be marked with a red exclamation point icon in the message list of the receiver.
Normal	The default for all messages. No special icons will appear.
Low	The message will be marked with a blue down-arrow icon in the message list of the receiver.

Message importance can also be set from the **Standard** toolbar of the message.


Untitled - Message (Rich Text)
File
Edit
View
Insert
Format
Tools
Actions
Help
Type a question for help
Send
Options...
Arial
10
B
I
U
To...
Cc...
Subject:

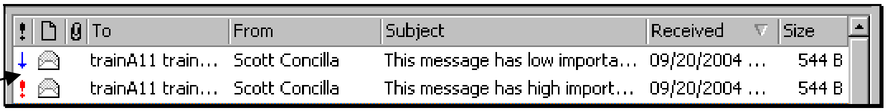
High importance

Low importance

The importance buttons both act as toggle buttons – they can either be on or off. Additionally, both buttons cannot be on at the same time.

Message importance does not affect the speed of delivery for a message. A message sent with high importance will be delivered at the same time and speed as a message with low importance.

Messages with importance set will appear in the receiver's Inbox with either a red exclamation point (high) or blue down-arrow (low). If no importance is set on a message (the default), the importance column will be blank.



!			To	From	Subject	Received	Size
↓			trainA11 train...	Scott Concilla	This message has low importa...	09/20/2004 ...	544 B
!			trainA11 train...	Scott Concilla	This message has high import...	09/20/2004 ...	544 B

Importance indicators

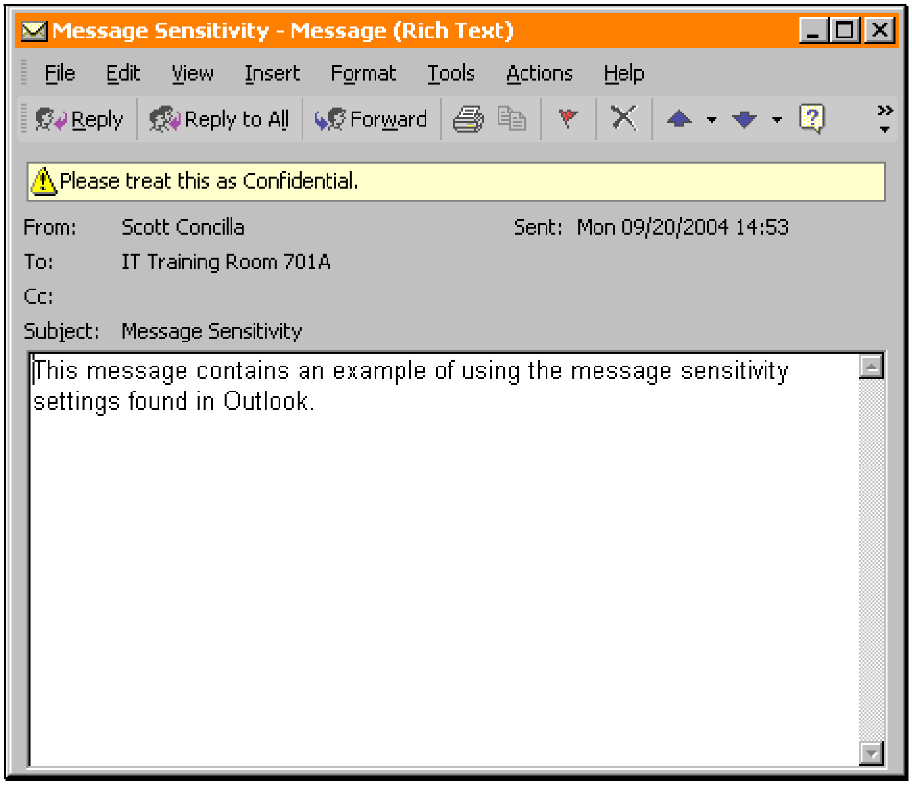
Setting Message Sensitivity

The second part of the **Message Settings** section determines the **Sensitivity** of the message.

Message sensitivity displays a note in the InfoBar of a sent message indicating how the receiver should treat the message. The following table explains the available options:

Option	Description
Normal	The default for all messages.
Personal	Marks the message as "Personal" in the InfoBar.
Private	Marks the message as "Private" in the InfoBar, and prevents others from making changes to the original message when replying to or forwarding the message.
Confidential	Marks the message as "Confidential" in the InfoBar.

When received, the corresponding message sensitivity will be displayed in the InfoBar:


Message Sensitivity - Message (Rich Text)
File
Edit
View
Insert
Format
Tools
Actions
Help
Reply
Reply to All
Forward

Please treat this as Confidential.

From: Scott Concilla

Sent: Mon 09/20/2004 14:53

To: IT Training Room 701A

Cc:

Subject: Message Sensitivity

This message contains an example of using the message sensitivity settings found in Outlook.

Adding Voting Buttons to a Message

When a user wants to send a message that asks for a multiple-choice answer to a simple question, voting buttons can be used. The recipient of a message that has voting buttons can respond merely by selecting the appropriate button.

Procedure:

1. In the **Message Options** dialog box, select the **Use Voting Buttons** check box.
2. Choose voting button options from the adjacent drop-down list or type in labels for the voting buttons separated only by a semi-colon (;). It is not necessary to include spaces between the choices. For example:

   chocolate;vanilla;strawberry
   Monday;Wednesday;Friday
   Keep It;Trash It

3. Select any other message options as needed.
4. Click **Close**.
5. Complete the e-mail message and **Send** it.

Warning:

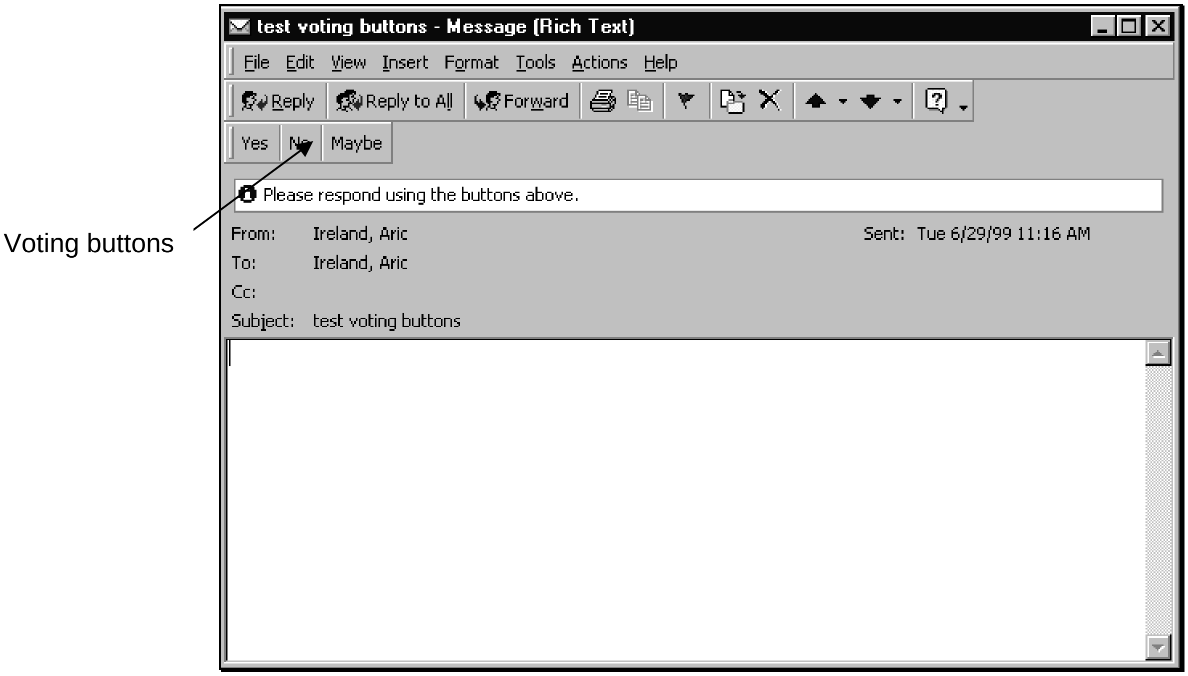
- The message author will not see the voting buttons in the message before it is sent.

Responding to a Voting Request

When receiving a message containing voting buttons, selecting the appropriate voting button sends a reply to the sender. Voting buttons are displayed above the e-mail as a toolbar, and a message on the InfoBar indicates that the user should respond using the voting buttons.

Procedure:

1. Open the e-mail containing the voting buttons.


test voting buttons - Message (Rich Text)
File Edit View Insert Format Tools Actions Help
Reply
Reply to All
Forward
Yes
No
Maybe

Voting buttons

Please respond using the buttons above.

From: Ireland, Aric

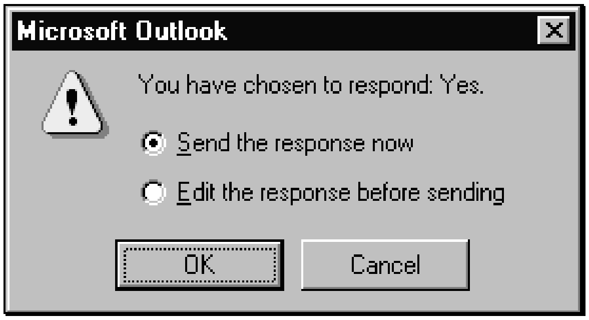
Sent: Tue 6/29/99 11:16 AM

To: Ireland, Aric

Cc:

Subject: test voting buttons

2. Click the appropriate voting button. Outlook displays the following dialog box:


Microsoft Outlook
OK
Cancel

You have chosen to respond: Yes.

● Send the response now

○ Edit the response before sending

3. Select the desired option and click **OK**.

4. If the **Edit the response before sending** option was selected, the dialog box closes and an e-mail message window displays. The selected voting response will be part of the subject of the reply.

5. Type any additional comments in the text area of the message and click **Send**.

Tip:

- Voting buttons are also visible in the header of the Preview Pane if it is turned on.

Tracking Voting Responses

The sender of an e-mail message that contains voting buttons can easily track the responses received back from the recipients.

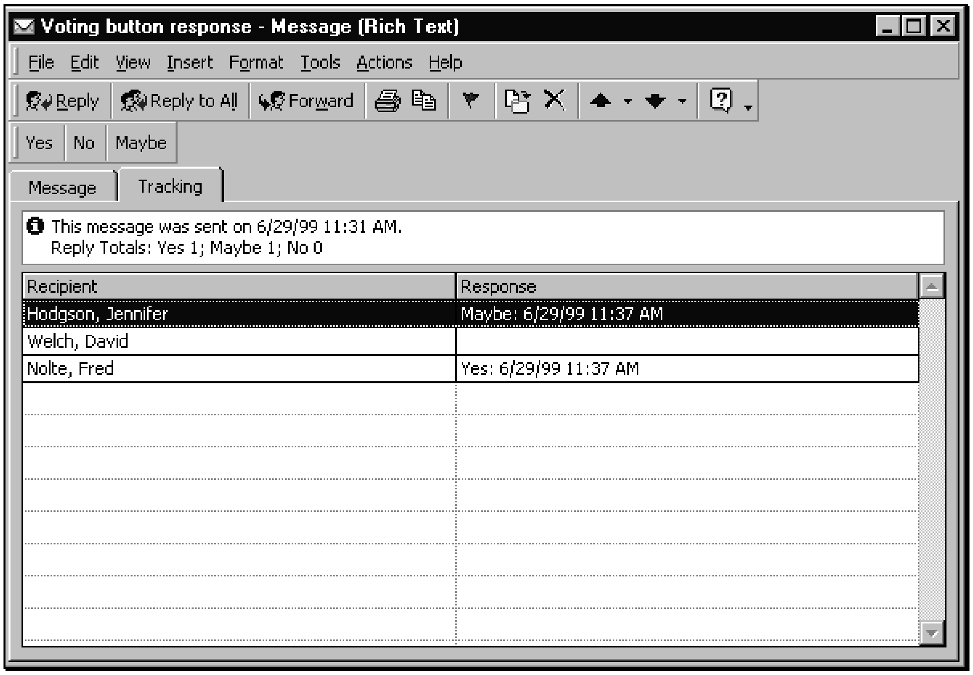
Use either of the procedures below to view the summary of voting responses.

Procedure:

1. Select the **Sent Items** folder (or whatever folder the original e-mail is stored in).

2. Open the e-mail by *double*-clicking it.

3. Select the **Tracking** tab. A list of the original recipients and their vote, if any, displays.


Voting button response - Message (Rich Text)
File Edit View Insert Format Tools Actions Help
Reply
Reply to All
Forward
Yes
No
Maybe
Message
Tracking

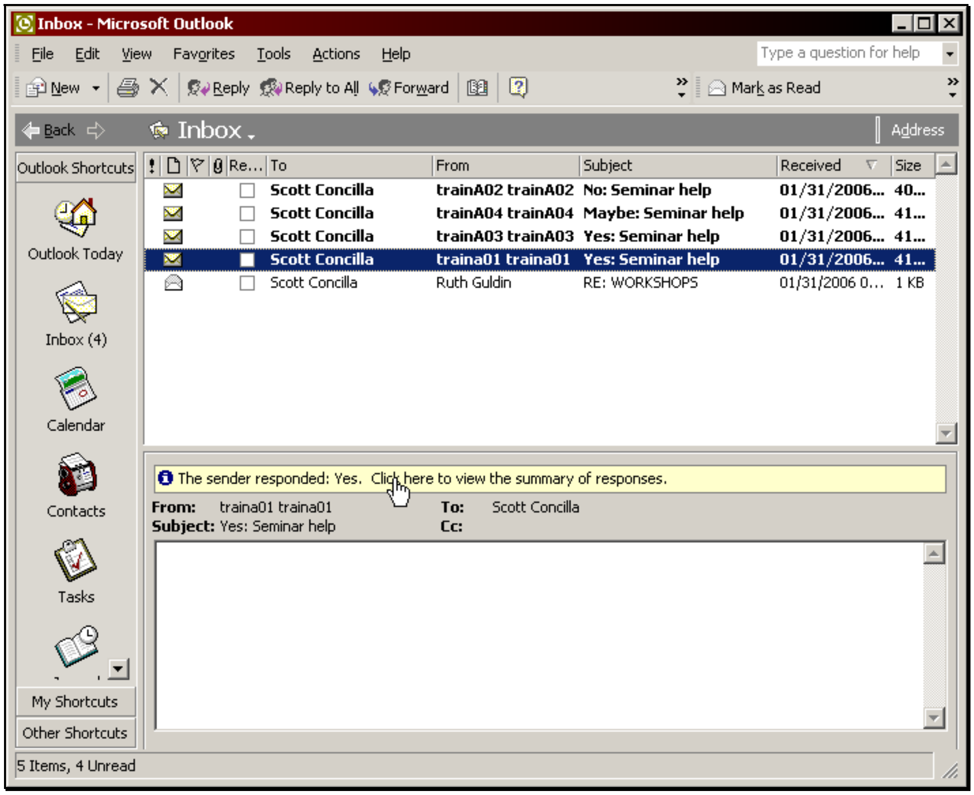
This message was sent on 6/29/99 11:31 AM.
Reply Totals: Yes 1; Maybe 1; No 0

Recipient	Response
Hodgson, Jennifer	Maybe: 6/29/99 11:37 AM
Welch, David	
Nolte, Fred	Yes: 6/29/99 11:37 AM

4. **Close** the message when completed.

Procedure:

1. Select any voting response in the Inbox.
2. In the Preview Pane, click the summary of responses link in the InfoBar of the message. (If the Preview Pane is not currently visible, turn it on).


Inbox - Microsoft Outlook
File Edit View Favorites Tools Actions Help
Type a question for help
New
Reply
Reply to All
Forward
Mark as Read
Back
Inbox
Address
Outlook Shortcuts
Outlook Today
Inbox (4)
Calendar
Contacts
Tasks
My Shortcuts
Other Shortcuts

To	From	Subject	Received	Size
Scott Concilla	trainA02 trainA02	No: Seminar help	01/31/2006...	40...
Scott Concilla	trainA04 trainA04	Maybe: Seminar help	01/31/2006...	41...
Scott Concilla	trainA03 trainA03	Yes: Seminar help	01/31/2006...	41...
Scott Concilla	traina01 traina01	Yes: Seminar help	01/31/2006...	41...
Scott Concilla	Ruth Guldin	RE: WORKSHOPS	01/31/2006 0...	1 KB

The sender responded: Yes. Click here to view the summary of responses.

From: traina01 traina01 **To:** Scott Concilla
Subject: Yes: Seminar help **Cc:**

5 Items, 4 Unread

3. Outlook displays the tracking tab of the messages with the summarized responses.

Tip:

- The original message will have an ⓘ icon in front of it.

Warnings:

- Recipients may vote more than once, however, Outlook will only record the first vote sent.
- Voting buttons are not removed from a message once a user has voted.

Using Message Tracking Options

Read or delivery receipts can be requested for any message. Both types of receipts are messages that are delivered back to the sender after the original message has sent. A **delivery receipt** indicates the date and time a message was delivered to the recipient's mail server. A **read receipt** indicates the date and time the recipient opened the message.

Specifying that a delivery or read receipt for a message is desired does not guarantee that one will be returned. The recipient's mail server or mail client might not support delivery and read receipts. The recipient might have configured their e-mail client to automatically reject requests for receipts, or the recipient might answer No when prompted to send a receipt.

If a receipt is received, it is a good indication that the message was delivered or read. However, if a receipt is not received, it cannot be assumed that the message was not delivered or read. A message receipt serves only as a positive notification, not a negative one.

Procedure:

1. Open the **Message Options** dialog box.
2. In the **Voting and Tracking Options** section, select either or both of the following check boxes:

Option	Description
Request a delivery receipt for this message	Select this check box to receive a message that contains the date and time the message arrived to the recipient’s post office.
Request a read receipt for this message	Select this check box to receive a message that contains the date and time the recipient read the message.

3. Select any other message options as needed.
4. Click **Close**.
5. Complete the e-mail message and **Send** it.

Redirecting Replies to a Message

There are times when the reply to a specific message should be sent to a different e-mail address. Outlook allows a sender to designate another person or e-mail address as the preferred address for a reply.

For instance, a manager may send out an e-mail requesting that all personnel respond to the message by e-mailing the department secretary. The manager can assist this process by designating in the e-mail options that his secretary should receive the replies.

Redirecting only works when the recipient clicks **Reply** in response to the original message. There is nothing to prevent the recipient from writing an original e-mail and sending it the original address.

Procedure:

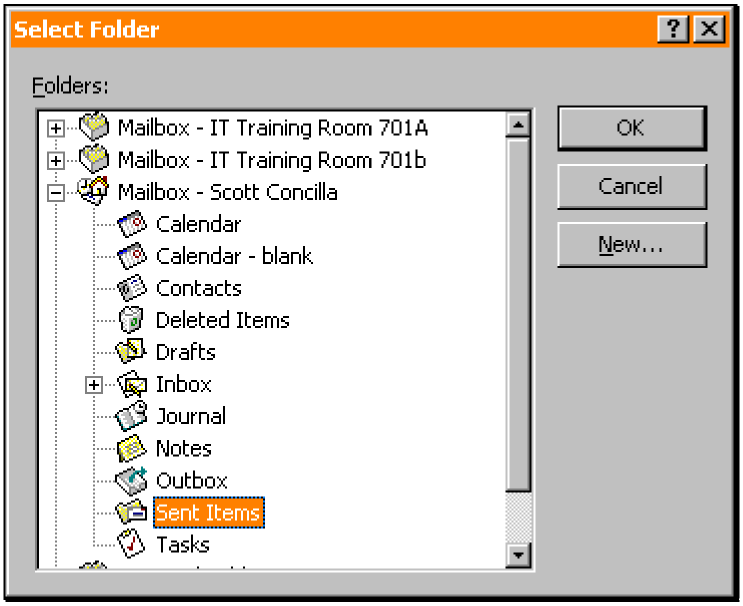
1. Open the **Message Options** dialog box.
2. In the **Delivery Options** section, select the **Have replies sent to** check box.
3. Click **Select Names** to choose an address from the address book (Global Address List or Outlook Contacts), or type a valid internet e-mail address in the box. More than one address can be entered in the box, as well as any combination of local and internet users. Multiple addresses should be separated by semicolons (;).
4. Add any other message options as desired.
5. Click **Close** to return to the message.
6. Complete the message and **Send** it.

Designating an Alternate Sent Item Folder

By default, Outlook will store copies of all sent e-mail in the **Sent Items** folder. However, a different folder may be designated for this purpose on a single e-mail basis.

Procedure:

1. Open the **Message Options** dialog box.
2. In the **Delivery Options** section, select the **Save sent message to** check box.
3. Click **Browse**. The **Select Folder** dialog box displays:


Select Folder
?
Folders:
Mailbox - IT Training Room 701A
Mailbox - IT Training Room 701b
Mailbox - Scott Concilla
Calendar
Calendar - blank
Contacts
Deleted Items
Drafts
Inbox
Journal
Notes
Outbox
Sent Items
Tasks
OK
Cancel
New...

4. Select an Outlook folder from the hierarchy and click **OK**.
5. Select any other message options as desired and click **Close**.
6. Complete the message and **Send** it.

Using Message Delivery Options

When a message is sent, it is delivered immediately by default. However, delivery of the message can be delayed until a specified time using the **Do not deliver before** option.

For example, a manager may write several e-mails before going on vacation, and set them to be delivered while gone. The e-mails will appear in the recipient's Inbox at the date and time designated by the sender.

Additionally, a message can also be set to expire by a certain date and time by using **Expires after**. This option can be used to ensure that a message gets deleted, or that a message is deleted once its contents are no longer relevant.

Both of these options are found in the **Delivery options** section of the **Message options** dialog box.

Procedure:

1. Open the **Message Options** dialog box.
2. In the **Delivery Options** section, select the **Do not deliver before** and/or **Expires after** check boxes.
3. Use the date and time drop-down lists to select the date and time for each option.
4. Select any other desired options for the message.
5. Click **Close** to return to the message.
6. Complete the message and **Send** it.

Tip:

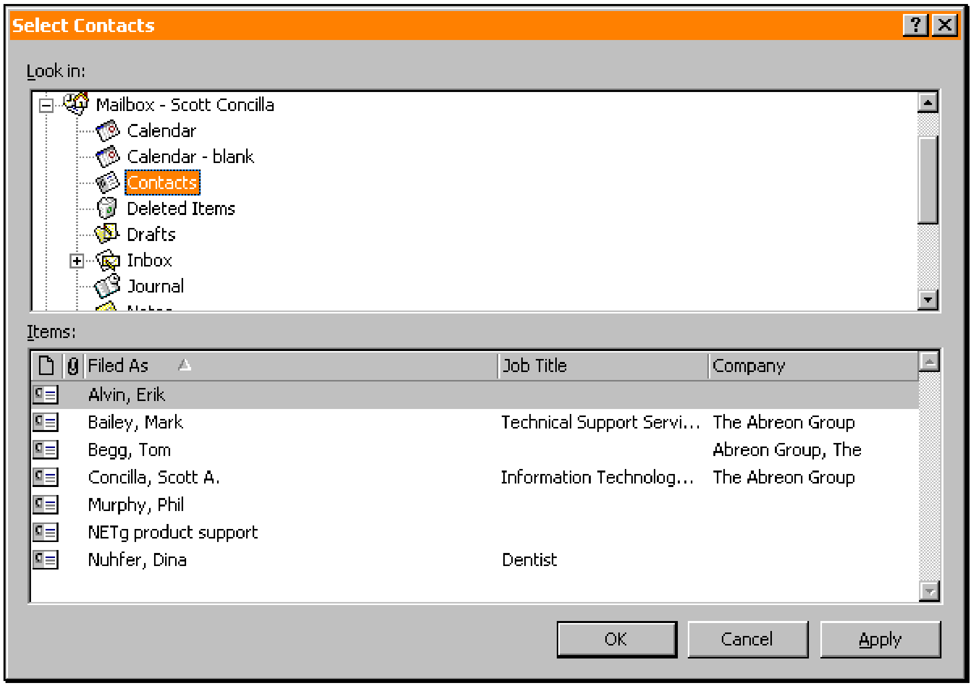
- When the message is received, it will be marked with the time and date the message was sent by the sender, not the time and date it was received.

Associating a Message with Other Outlook Items

Messages in Outlook can be "linked" or "associated" with other items in Outlook. This makes it easy to find messages that may be associated with a particular Outlook Contact, or find all messages in a specific category.

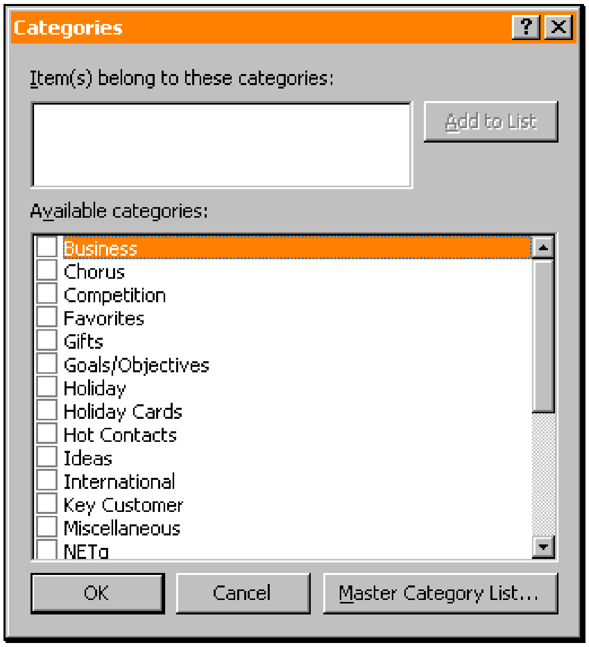
Procedure:

1. Open the **Message Options** dialog box.
2. Click **Contacts**. The **Select Contacts** dialog box displays:


Select Contacts
?
Look in:
Mailbox - Scott Concilla
Calendar
Calendar - blank
Contacts
Deleted Items
Drafts
Inbox
Journal
Items:
OK
Cancel
Apply

Filed As	Job Title	Company
Alvin, Erik		
Bailey, Mark	Technical Support Servi...	The Abreon Group
Begg, Tom		Abreon Group, The
Concilla, Scott A.	Information Technolog...	The Abreon Group
Murphy, Phil		
NETg product support		
Nuhfer, Dina	Dentist	

3. Select the desired **Contacts** and click **Apply**.
4. Click **OK** to return to the **Message Options** dialog box.
5. Click **Categories**. The **Categories** dialog box displays:


Categories
?
Item(s) belong to these categories:
Add to List
Available categories:
☐ Business
☐ Chorus
☐ Competition
☐ Favorites
☐ Gifts
☐ Goals/Objectives
☐ Holiday
☐ Holiday Cards
☐ Hot Contacts
☐ Ideas
☐ International
☐ Key Customer
☐ Miscellaneous
☐ NETg
OK
Cancel
Master Category List...

6. Select any category check boxes to which this message should belong, or type new categories into the **Item(s) belong to these categories** box and click **Add to List**.

7. Click **OK** when completed to return to the **Message Options** dialog box.

8. Select any other desired options and click **Close** to return to the message.

9. Complete the message and **Send** it.

Finding and Searching for Messages

Outlook's Find Bar allows quick searches of folders to locate messages. The search can be performed on one of four general locations, or can be customized to search a single folder or group of folders.

Procedure:

1.

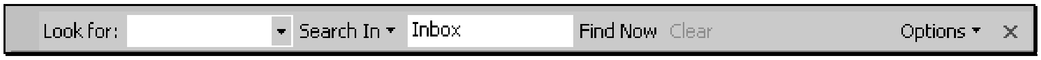
Click the **Find** button on the **Outlook** toolbar.

OR

From the **Tools** menu, select **Find**.

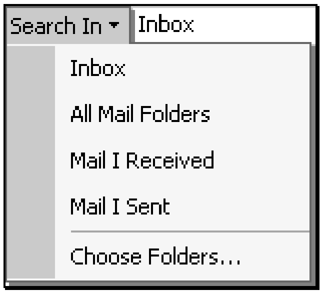
OR

Press **[Ctrl]** + **[E]**. The **Find** bar displays above the message list.


Look for:
Search In
Inbox
Find Now
Clear
Options
×

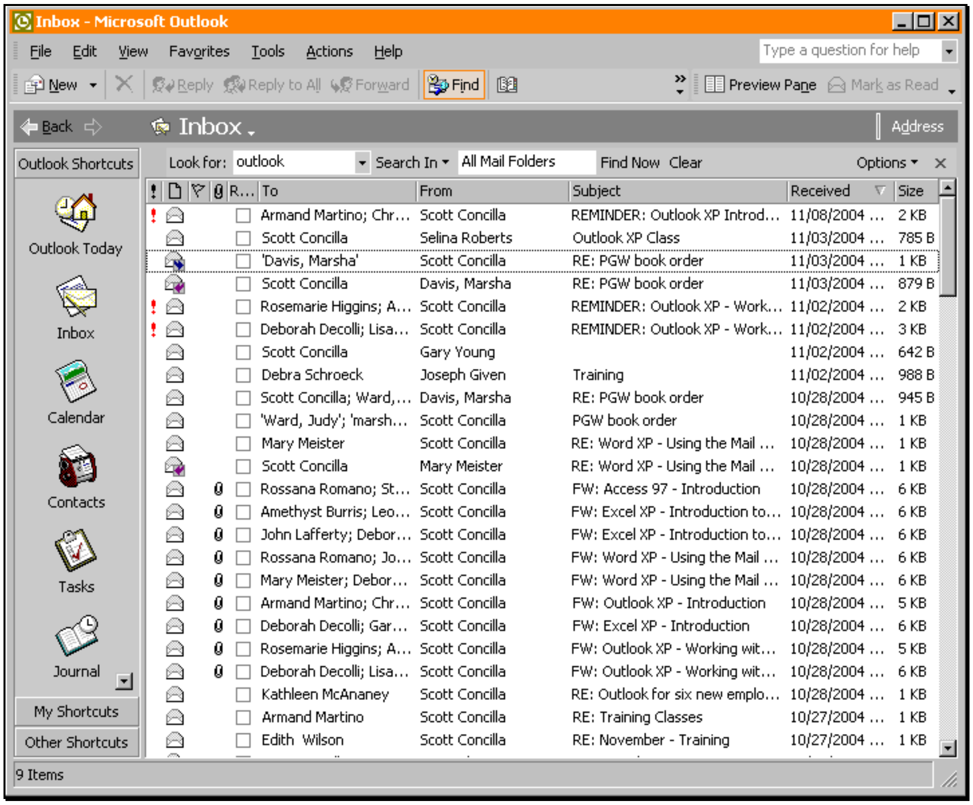
2. In the **Look for** box, type a word or phrase to search for, or use the drop-down list to select a previous search.

3. Click **Search In** to display a drop-down menu and select where Outlook should search for the message. Outlook provides four general choices, or use the **Choose Folders** option to select a specific folder or hierarchy of folders.


Search In
Inbox
Inbox
All Mail Folders
Mail I Received
Mail I Sent
Choose Folders...

4. Click **Find Now** to begin the search. Click **Stop** at any time to halt the search.

5. The results of the search display in the message list:


Inbox - Microsoft Outlook
File
Edit
View
Favorites
Tools
Actions
Help
Type a question for help
New
Reply
Reply to All
Forward
Find
Preview Pane
Mark as Read
Back
Inbox
Address
Outlook Shortcuts
Outlook Today
Inbox
Calendar
Contacts
Tasks
Journal
My Shortcuts
Other Shortcuts
Find Now
Clear
Options
9 Items

Look for: outlook

Search In: All Mail Folders

!	📎	To	From	Subject	Received	Size
!		Armand Martino; Chr...	Scott Concilla	REMINDER: Outlook XP Introd...	11/08/2004 ...	2 KB
		Scott Concilla	Selina Roberts	Outlook XP Class	11/03/2004 ...	785 B
		'Davis, Marsha'	Scott Concilla	RE: PGW book order	11/03/2004 ...	1 KB
		Scott Concilla	Davis, Marsha	RE: PGW book order	11/03/2004 ...	879 B
!		Rosemarie Higgins; A...	Scott Concilla	REMINDER: Outlook XP - Work...	11/02/2004 ...	2 KB
!		Deborah Decolli; Lisa...	Scott Concilla	REMINDER: Outlook XP - Work...	11/02/2004 ...	3 KB
		Scott Concilla	Gary Young		11/02/2004 ...	642 B
		Debra Schroeck	Joseph Given	Training	11/02/2004 ...	988 B
		Scott Concilla; Ward,...	Davis, Marsha	RE: PGW book order	10/28/2004 ...	945 B
		'Ward, Judy'; 'marsh...	Scott Concilla	PGW book order	10/28/2004 ...	1 KB
		Mary Meister	Scott Concilla	RE: Word XP - Using the Mail ...	10/28/2004 ...	1 KB
		Scott Concilla	Mary Meister	RE: Word XP - Using the Mail ...	10/28/2004 ...	1 KB
	📎	Rossana Romano; St...	Scott Concilla	FW: Access 97 - Introduction	10/28/2004 ...	6 KB
	📎	Amethyst Burris; Leo...	Scott Concilla	FW: Excel XP - Introduction to...	10/28/2004 ...	6 KB
	📎	John Lafferty; Debor...	Scott Concilla	FW: Excel XP - Introduction to...	10/28/2004 ...	6 KB
	📎	Rossana Romano; Jo...	Scott Concilla	FW: Word XP - Using the Mail ...	10/28/2004 ...	6 KB
	📎	Mary Meister; Debor...	Scott Concilla	FW: Word XP - Using the Mail ...	10/28/2004 ...	6 KB
	📎	Armand Martino; Chr...	Scott Concilla	FW: Outlook XP - Introduction	10/28/2004 ...	5 KB
	📎	Deborah Decolli; Gar...	Scott Concilla	FW: Excel XP - Introduction	10/28/2004 ...	6 KB
	📎	Rosemarie Higgins; A...	Scott Concilla	FW: Outlook XP - Working wit...	10/28/2004 ...	5 KB
	📎	Deborah Decolli; Lisa...	Scott Concilla	FW: Outlook XP - Working wit...	10/28/2004 ...	6 KB
		Kathleen McAnaney	Scott Concilla	RE: Outlook for six new emplo...	10/28/2004 ...	1 KB
		Armand Martino	Scott Concilla	RE: Training Classes	10/27/2004 ...	1 KB
		Edith Wilson	Scott Concilla	RE: November - Training	10/27/2004 ...	1 KB

6. Click **Clear** to perform another search or restore the original list, or click the **X** at the end of the **Find** bar to close it.

Tips:

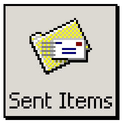
- The **Options** button at the end of the Find Bar can be used to access the **Advanced Find** dialog box, which is used to create more detailed and advanced criteria for searches.
- To restrict the search to message headers only, select the **Options** button and clear the check mark next to **Search All Text In Each Message**.

Resending a Message

Any time a message is sent, a copy of it is placed in the **Sent Items** folder. These copies can be kept in the Sent Items folder, or they can be moved to other folders. An additional benefit of keeping copies is the ability to re-use and re-send previously sent e-mails.

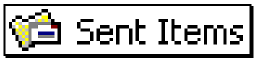
Messages can be sent again to the same person or sent to someone else without having to retype the original message.

Procedure:

1. 

Click the **Sent Items** button on the **Outlook Shortcuts** bar (usually in the **My Shortcuts** group).

   OR

Click the **Sent Items** folder in the folder list.

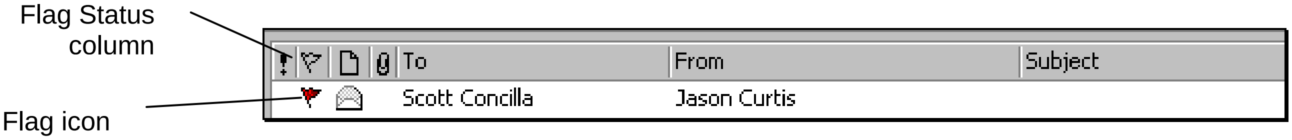
   OR

   Locate the message to be sent again in any Outlook folder.

2. *Double*-click the message to open it.
3. Select the **Actions** menu of the message and choose **Resend This Message**. This will place the original message, recipient, and subject in a new **Mail Message** window.
4. Add any new information and/or recipients as necessary.
5. When the message is ready, click **Send**.

Flagging a Message

Flagging a message allows either the sender or receiver to place a special mark on a message and set a reminder to follow up on that message. A message that has been flagged will contain a red flag icon in the **Flag Status** column in the message list.


Flag Status column

Flag icon

!	Flag	Icon	Attachment	To	From	Subject
	🚩	✉		Scott Concilla	Jason Curtis	

Procedure: (To flag a message that has been received)

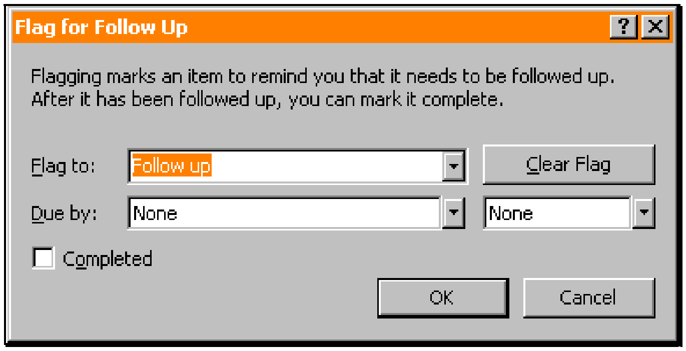
1. *Right*-click the message to be flagged and choose **Follow Up** from the shortcut menu.

   OR

   Highlight the message, select the **Actions** menu choose **Follow Up**.

   OR

   Open the message to be flagged and click the **Follow Up** button on the **Standard** toolbar.



Flagging marks an item to remind you that it needs to be followed up. After it has been followed up, you can mark it complete.

Flag to: Follow up

Due by: None None

☐ Completed

2. In the **Flag to** box, use the drop-down list to select the option that describes the action to be taken. Alternatively, type a customized entry in the box.

3. In the **Due by** boxes, use the drop-down lists to select a date and time to receive a reminder about the item.

4. Click **OK** when complete.

Procedure: (To flag a message being sent)

1. Click the **Follow Up** button on the **Standard** toolbar of the message.

   OR

   Select the **Actions** menu and choose **Follow Up**.

2. In the **Flag to** box, use the drop-down list to select the option that describes the action to be taken. Alternatively, type a customized entry in the box.

3. In the **Due by** boxes, use the drop-down lists to select a date and time to receive a reminder about the item.

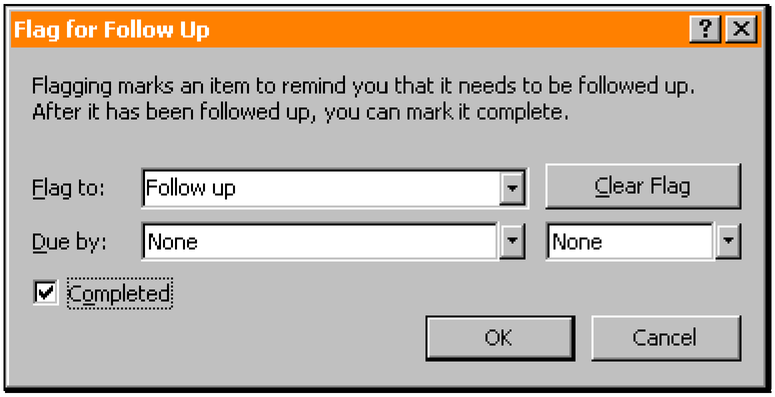
4. Click **OK** when complete.

5. **Send** the message when complete.

Procedure: (To mark a flagged message as completed)

1. Select the message and display the **Follow Up** dialog box (see previous procedures).

2. Select the **Completed** check box.



Flag for Follow Up

Flagging marks an item to remind you that it needs to be followed up.
After it has been followed up, you can mark it complete.

Flag to: Follow up

Due by: None None

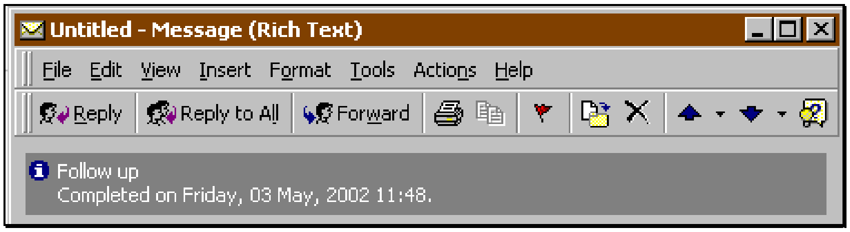
☑ Completed

3. Click **OK**.

OR

Right-click the message and select **Flag Complete**.

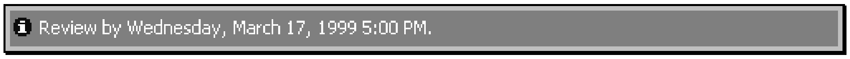
4. The message will be marked as completed. The flag icon will change from red to white in the message list, and the InfoBar of the message will contain the completed date and time.


Untitled - Message (Rich Text)
File Edit View Insert Format Tools Actions Help
Reply
Reply to All
Forward

Follow up
Completed on Friday, 03 May, 2002 11:48.

Tips:

- Use the **Clear Flag** button to clear all settings in the dialog box.
- The flag information appears within the InfoBar of the message:



Review by Wednesday, March 17, 1999 5:00 PM.

- If the **Clear Flag** option is used, the InfoBar information relating to the flag is also deleted.

Warning:

- Outlook will only display reminders for flagged messages that remain in the Inbox. If a message is moved to any other folder, the reminder will not be displayed.

Recalling a Message

Outlook provides the user with a unique feature that allows the recall of a message after it has been sent. If a message is still in the Inbox of the recipient and *has not* been read, the sender can attempt to recall the message, and remove it from the recipient's Inbox.

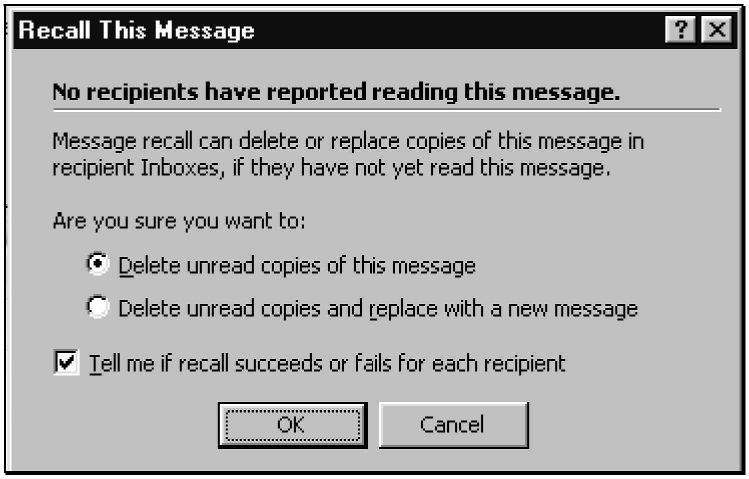
However, it is important to understand that this feature is not foolproof and instantaneous. It may take up to a minute or longer for Outlook to recall the message from the recipient's Inbox. **In that time, the receiver will still be able to read the original message and/or the Recall Notice.**

There are also many instances where a recall will simply not work. Messages that have been sent via the Internet cannot be recalled. Messages that have already been read or moved to another folder also cannot be recalled.

Procedure:

1. Open the sent message by *double*-clicking on it.

2. Select the **Actions** menu and choose **Recall This Message**. The **Recall This Message** dialog box displays:



No recipients have reported reading this message.

Message recall can delete or replace copies of this message in recipient Inboxes, if they have not yet read this message.

Are you sure you want to:

● Delete unread copies of this message
○ Delete unread copies and replace with a new message

☑ Tell me if recall succeeds or fails for each recipient

The bold text at the top of the dialog box contains information on whom, if anyone, has read the message.

3. In the **Are you sure you want to** section, select the appropriate option.

4. Select the **Tell me if recall succeeds or fails for each recipient** check box to receive a notification about the recall for each recipient.

5. Click **OK** to accept the choices.
6. If **Delete unread copies and replace with a new message** was chosen, write a new message and **Send** it.
7. Outlook attempts to recall the message by sending a recall notice to the original message recipients.
8. If requested, a **Message Recall Success** or **Message Recall Failure** notice will be sent back to the original sender.
9. To view the message recall statistics, open the original recalled message in the **Sent Items** folder and select the **Tracking** tab.

Warnings:

- The user can only recall or replace messages sent to recipients who are logged on with Outlook open on their desktop.
- The Preview Pane will often cause problems with the results of a message recall. It is possible for the recalling user to receive a **Message Recall Success** notice, when in reality, the recipient has already read the message via the Preview Pane.

Saving an Incomplete Message

Outlook has the ability to save a message without sending it. This gives the flexibility to create incomplete messages, and then return to work on them at a different time.

Unfinished messages are saved in the **Drafts** folder and are only sent when the user selects the **Send** command or specifies a sending option.

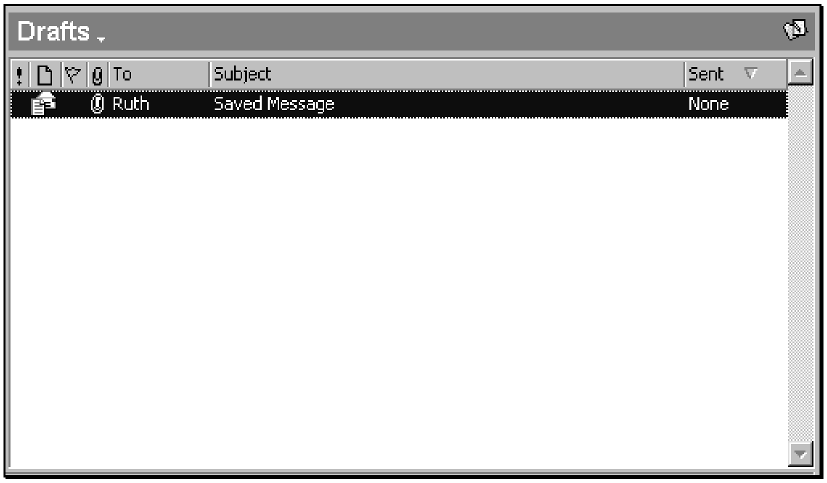
Procedure: (To save a draft)

1. Create the new message.
2. Select the **File** menu and choose **Save**.

OR

Click the **Save** button on the **Standard** toolbar.

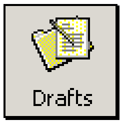
3. Close the message. The message is saved in the **Drafts** folder.



Drafts

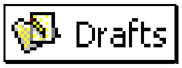
!				To	Subject	Sent
				Ruth	Saved Message	None

Procedure: (To edit or send a saved draft)

1. 

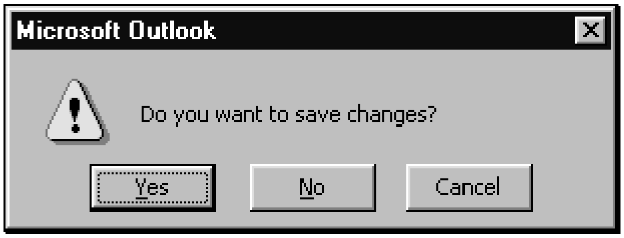
Select the **Drafts** folder from the **Outlook Shortcut** bar (usually in the **My Shortcuts** group) or the folder list.

OR



Select the **Drafts** folder in the folder list.

2. *Double*-click the message to open it.
3. Edit the message as needed.
4. **Send** the message when it is completed.
5. If the message has been changed, and the user tries to close it without sending it, the following warning displays:


Microsoft Outlook

Do you want to save changes?

6. Click **Yes** to save the changes and place the message back into the **Drafts** folder.

Creating a Signature

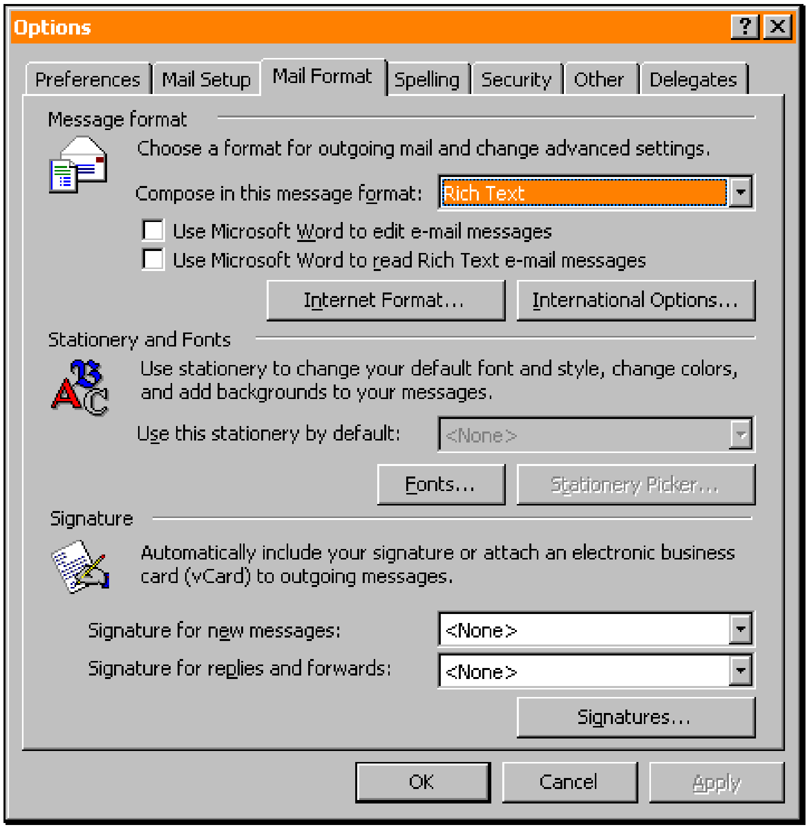
A signature is text that is automatically added to the a message, usually at the end. This text can be the user's name, job title, phone number, e-mail address, etc.

Each user can create and save multiple signatures. The desired signature can be selected and attached to a message at the time the message is created, or a default signature can be applied to all messages.

Additionally, separate signatures can be created new messages, and messages which are replies or forwards.

Procedure:

1. Select the **Tools** menu and choose **Options**.
2. Select the **Mail Format** tab.


Options
?
Preferences
Mail Setup
Mail Format
Spelling
Security
Other
Delegates
Message format
Internet Format...
International Options...
Stationery and Fonts
Fonts...
Stationery Picker...
Signature
Signatures...
OK
Cancel
Apply

Choose a format for outgoing mail and change advanced settings.

Compose in this message format: Rich Text

☐ Use Microsoft Word to edit e-mail messages

☐ Use Microsoft Word to read Rich Text e-mail messages

Use stationery to change your default font and style, change colors, and add backgrounds to your messages.

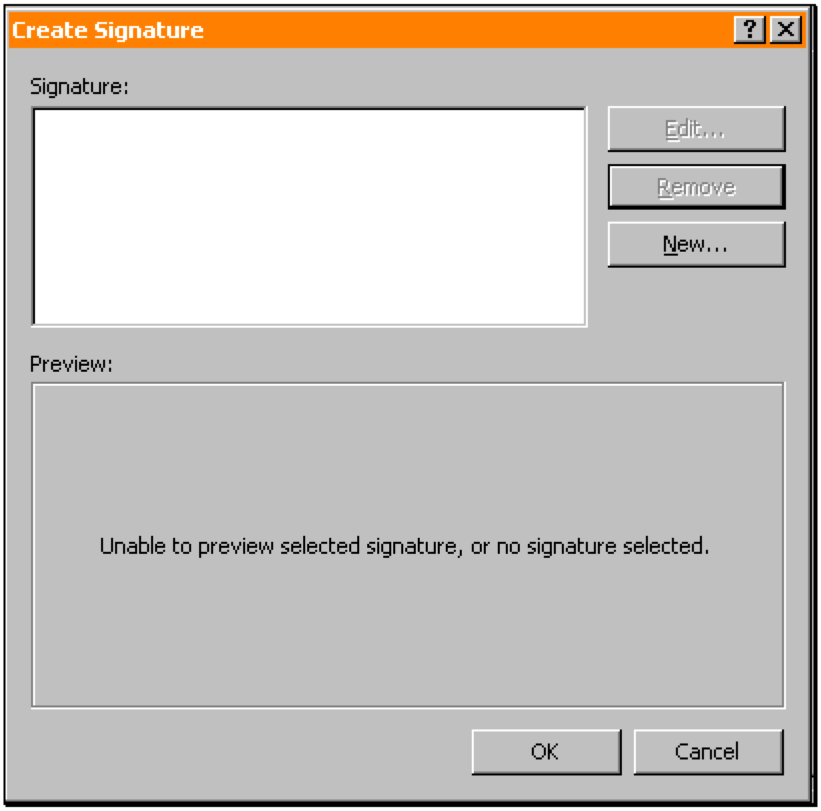
Use this stationery by default: <None>

Automatically include your signature or attach an electronic business card (vCard) to outgoing messages.

Signature for new messages: <None>

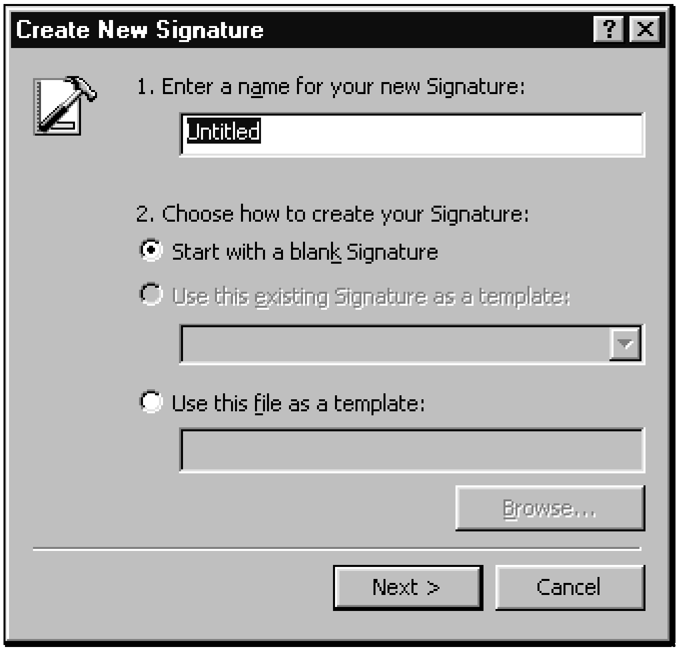
Signature for replies and forwards: <None>

3. Click **Signatures**. The **Create Signature** dialog box displays:


Create Signature
?
Signature:
Edit...
Remove
New...
Preview:
OK
Cancel

Unable to preview selected signature, or no signature selected.

4. Click **New**. The **Create New Signature** dialog box displays:


Create New Signature
?
Use this existing Signature as a template:
Use this file as a template:
Browse...
Next >
Cancel

1. Enter a name for your new Signature: Untitled

2. Choose how to create your Signature:
● Start with a blank Signature
○ Use this existing Signature as a template:
○ Use this file as a template:

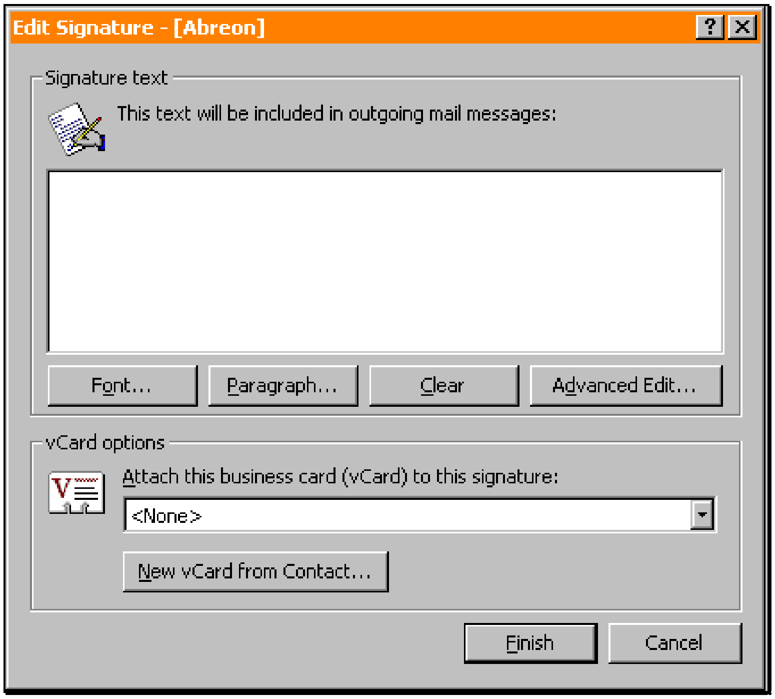
5. In the **Enter a name for your new signature** text box, type a descriptive name for the signature.

6. In the **Choose how to create your signature** area, select **Start with a blank signature**.

OR

Click the **Use this file as a template** option to base the signature on another file. In this case, the **Browse** button can be used to enter the path to the file name.

7. Click **Next**. The **Edit Signature** dialog box displays:


Edit Signature - [Abreon]
Signature text
This text will be included in outgoing mail messages:
Font...
Paragraph...
Clear
Advanced Edit...
vCard options
Attach this business card (vCard) to this signature:
<None>
New vCard from Contact...
Finish
Cancel

8. In the **Signature Text** area, type the text to be included in the signature. This can be a job title, company address, e-mail address, phone number, fax number, etc.

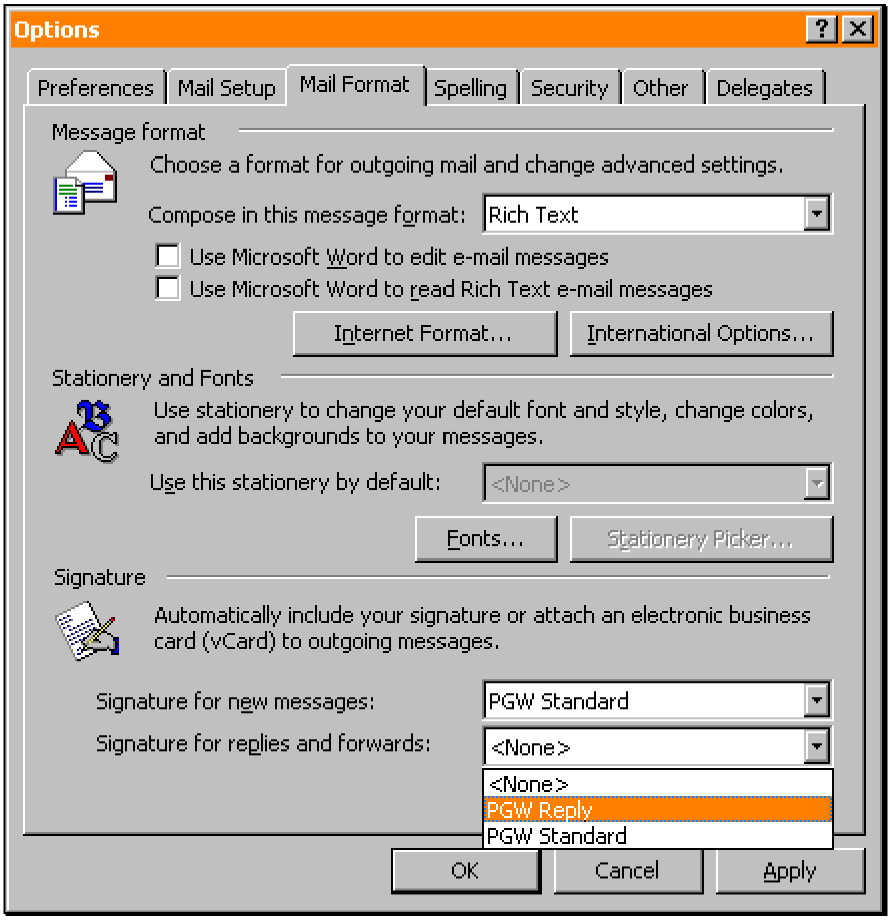
9. Use the **Font** and **Paragraph** buttons to apply additional formatting to the signature.

10. Use **Advanced Edit** to add graphics or other special formatting not available in the basic signature editor. Advanced Edit will launch Microsoft Word. Once finished editing in Word, close the application to return to the **Edit Signature** dialog box.

11. If needed, click **Clear** to erase the contents of the **Signature** text box and start over.

12. Click **Finish** to save the signature and return to the **Create Signature** dialog box.

13. Click **OK** again to return to the **Options** dialog box.



Options
?
Preferences
Mail Setup
Mail Format
Spelling
Security
Other
Delegates
Message format
Internet Format...
International Options...
Stationery and Fonts
Fonts...
Stationery Picker...
Signature
<None>
PGW Reply
PGW Standard
OK
Cancel
Apply

Choose a format for outgoing mail and change advanced settings.

Compose in this message format: Rich Text

☐ Use Microsoft Word to edit e-mail messages

☐ Use Microsoft Word to read Rich Text e-mail messages

Use stationery to change your default font and style, change colors, and add backgrounds to your messages.

Use this stationery by default: <None>

Automatically include your signature or attach an electronic business card (vCard) to outgoing messages.

Signature for new messages: PGW Standard

Signature for replies and forwards: <None>

14. The signature that was just created appears in the **Signature for new messages** drop-down list. If more than one signature was created, select the default signature from the drop-down list, or select **<None>** for no default signature. A signature can be inserted at the time an e-mail is created.

15. If desired, select a **Signature for replies and forwards** from the drop-down list. Leave this selection as **<none>** to prevent a signature from being added to replies or forwards.

16. Click **OK** to close the **Options** dialog box.

Tips:

- Text can be pasted from another document into the **Signature** text area.
- Signatures should be no more than three or four lines of text.
- So that the signature doesn't "run up" against text in the message, it is a good idea to have the first line of the signature be a blank line.
- To stop using the selected signature as the default signature, select another signature from the drop-down list, or select **<None>** to stop adding any signature.

Warning:

- Fonts used in a signature should be restricted to the standard Windows fonts, such as Times New Roman, Arial, and Century Gothic. The use of script fonts or other special fonts is not recommended, as not all users have these fonts on their workstations, and may render the signature text as unreadable to a recipient.

Inserting a Signature

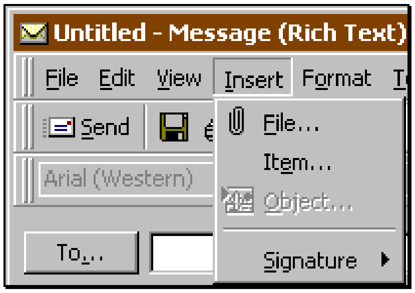
A signature set can be added to all new e-mails by default as defined in the Outlook options as previously discussed. Signatures can also be inserted manually at the time the e-mail is created. This allows flexibility in choosing different signatures for different recipients.

For instance, a user can have one signature for e-mails sent to their co-workers, and a different signature for e-mails sent via the Internet.

Procedure:

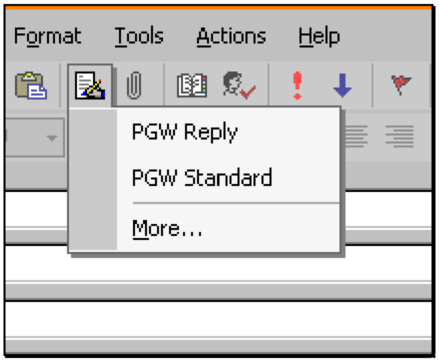
1. Start a new message.
2. When finished with the message, place the cursor where the signature should appear.

3. Select the **Insert** menu and choose **Signature**.


Untitled - Message (Rich Text)
File Edit View Insert Format T
Send
Arial (Western)
To...
File...
Item...
Object...
Signature

OR

Click the **Signature** button on the **Message** toolbar.


Format Tools Actions Help
PGW Reply
PGW Standard
More...

4. A submenu of available signatures will appear. Select the appropriate signature.

5. The signature will be added to the e-mail wherever the cursor was placed.

6. Complete the e-mail and **Send** it.

Tip:

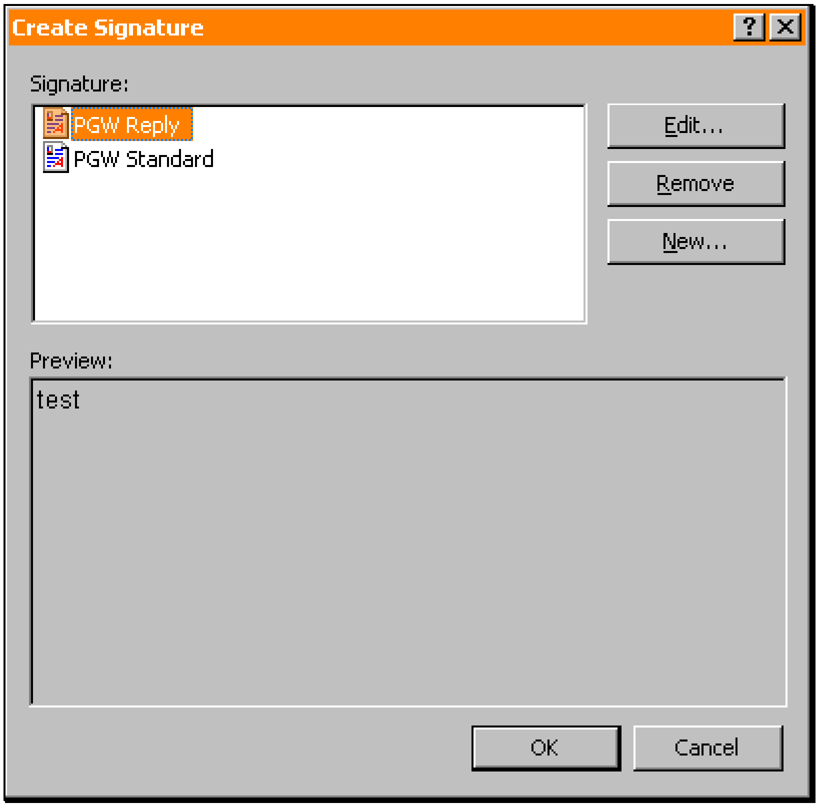
- This procedure can also be used to “temporarily” use a different signature set instead of the default. Highlight and delete the default signature text from the e-mail and then insert a new signature.

Editing a Signature

Once created, a signature can be edited at any time to update or change the information it contains.

Procedure:

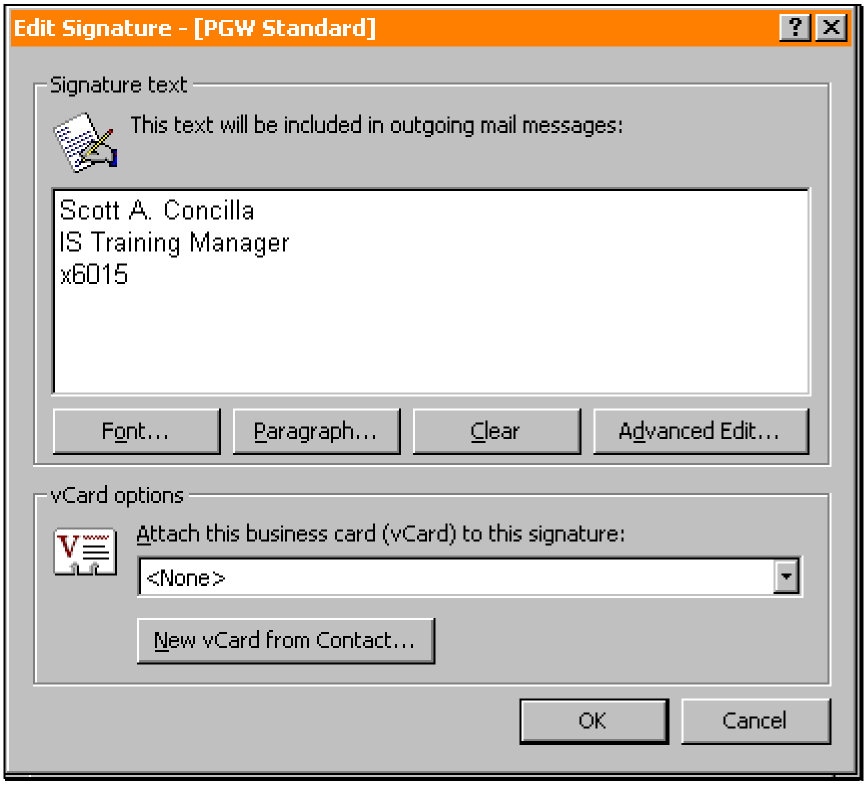
1. Select the **Tools** menu and choose **Options**.
2. Select the **Mail Format** tab.
3. Click **Signatures**. The **Create Signature** dialog box displays:


Create Signature
Signature:
Edit...
Remove
New...
Preview:
OK
Cancel

PGW Reply
PGW Standard

test

4. Select a signature from the list
5. Click **Edit**. The **Edit Signature** dialog box displays:



Edit Signature - [PGW Standard]

Signature text

This text will be included in outgoing mail messages:

Scott A. Concilla
IS Training Manager
x6015

vCard options

Attach this business card (vCard) to this signature: <None>

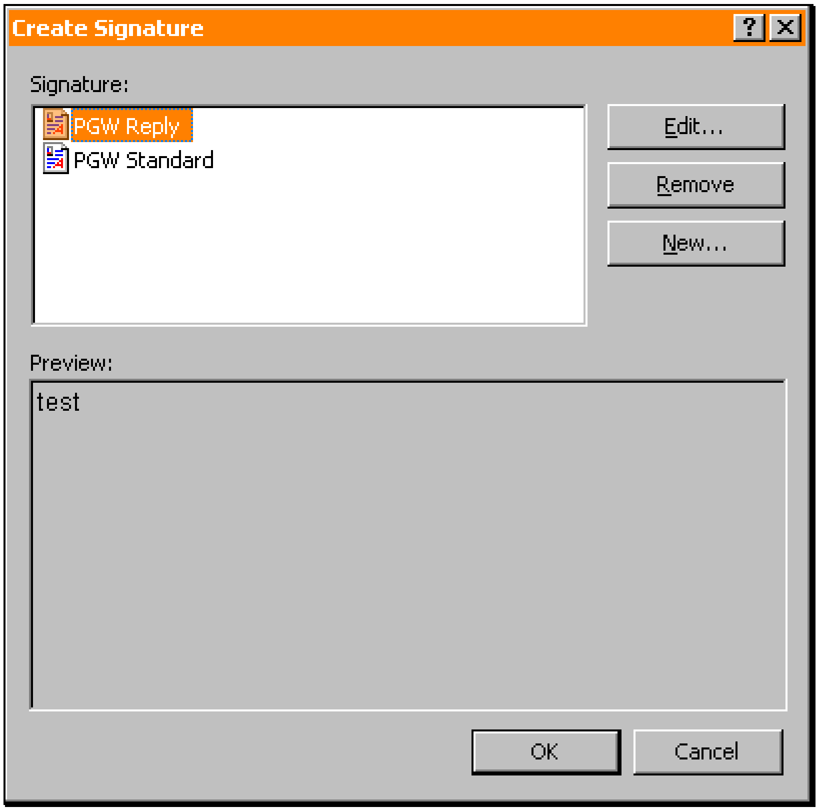
6. Make the desired changes and click **OK**.
7. Click **OK** again to close the **Create Signature** dialog box.
8. Click **OK** again to close the **Options** dialog box and return to Outlook.

Deleting a Signature

Signatures that are no longer needed can be deleted from the signature list.

Procedure:

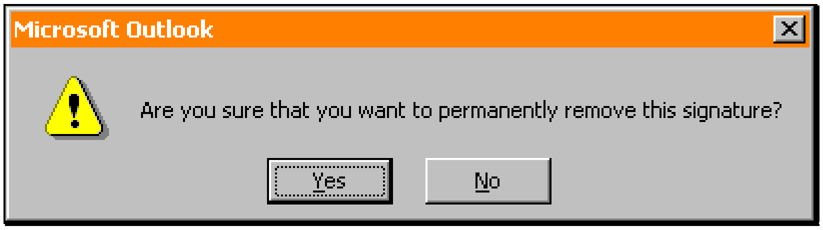
1. Select the **Tools** menu and choose **Options**.
2. Select the **Mail Format** tab.
3. Click **Signatures**. The **Create Signature** dialog box displays:


Create Signature
Signature:
PGW Reply
PGW Standard
Edit...
Remove
New...
Preview:
OK
Cancel

test

4. Select a signature from the list.

5. Click **Remove**. The following warning displays:


Microsoft Outlook
Yes
No

Are you sure that you want to permanently remove this signature?

6. Confirm that the signature should be deleted by clicking **Yes**, or click **No** to cancel.

7. Click **OK** to close the **Create Signature** dialog box, and click **OK** again to close the **Options** dialog box.

Chapter 2

Working with Attachments

Chapter Objectives:

- Inserting Attachments
- Opening Message Attachments
- Saving Attached Files
- Modifying and Editing Attachments
- Deleting an Attachment
- Sending Attachments Using Other Office Programs

Chapter 2 – Working with Attachments

Overview

Not only can Outlook send text messages, but also files of any type – Word documents, Excel spreadsheets, and PowerPoint presentations – can be attached to an e-mail and sent to other users.

Outlook uses a paper clip icon to symbolize attached files, much in the same way a person would attach documents together using a paper clip.

The chapter will explore how to insert, save, and delete attachments.

Inserting Attachments

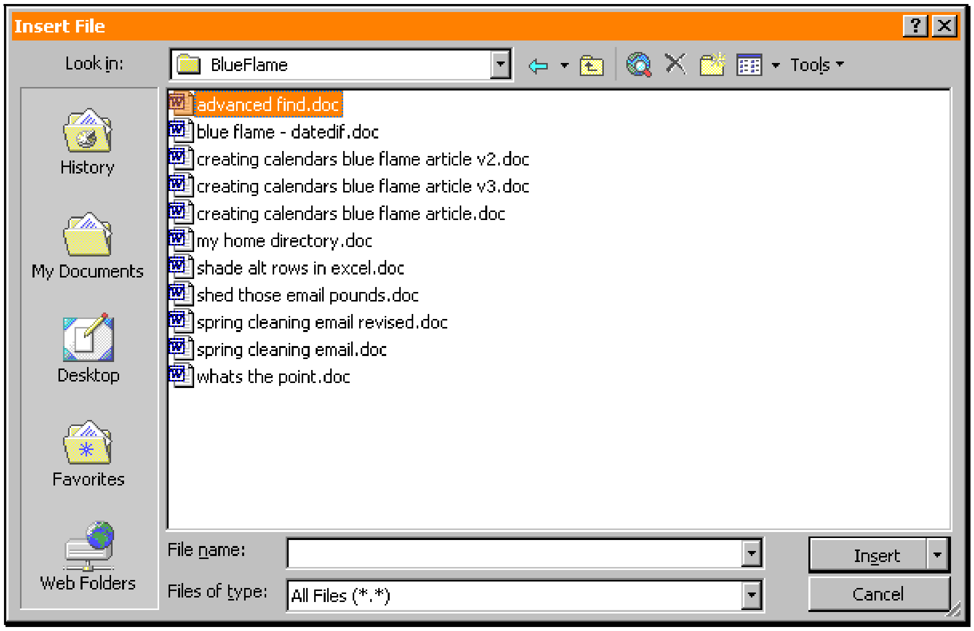
Many times it is necessary to send an attachment along with the text of a message. Documents, proposals, spreadsheets, presentations, graphics, and many other types of files can be sent by attaching a copy of the file to the message.

Procedure:

1. Create and address a new mail message.
2. Select the **Insert** menu and choose **File**.

OR

Click the **Insert File** button on the toolbar. The **Insert File** dialog box displays:



Insert File
?
History
My Documents
Desktop
Favorites
Web Folders
advanced find.doc
blue flame - datedif.doc
creating calendars blue flame article v2.doc
creating calendars blue flame article v3.doc
creating calendars blue flame article.doc
my home directory.doc
shade alt rows in excel.doc
shed those email pounds.doc
spring cleaning email revised.doc
spring cleaning email.doc
whats the point.doc
File name:
Insert
Cancel
Tools

Look in: BlueFlame

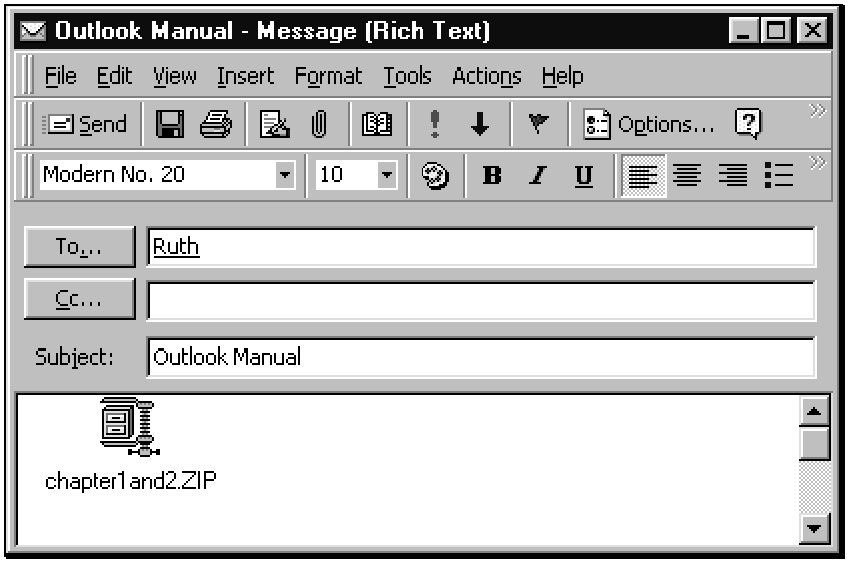
Files of type: All Files (*.*)

3. Locate and select the file(s) to be attached to the message. Multiple files can be selected by using **[Ctrl]**+click or **[Shift]**+click.

4. Click **Insert** to add the file(s) to the e-mail, or click the drop-down arrow on the right side of the button and select one of the following options:

Option	Description
Insert as text	Inserts the contents of the file as text into the body of the message.
Insert as attachment	Inserts the file as an attachment into the message. This is the default.
Insert as hyperlink	Inserts a hyperlink to the file. The receiver must have the same directory access as the sender. For instance, if the hyperlink points to a file on the sender's S: drive, the receiver should have the same S: drive, otherwise the hyperlink will not work. Hyperlinks to files on the C: or H: drives will almost always fail, since no two users have the same H: drive, and most users have their own workstation or C: drive.

5. Click **OK** when complete. If the file is inserted as an **Attachment**, an icon with the file name appears in the text area of the message.


Outlook Manual - Message (Rich Text)
File Edit View Insert Format Tools Actions Help
Send
Options...
Modern No. 20
10
B I U
To...
Cc...

Subject: Outlook Manual

To: Ruth

chapter1and2.ZIP

6. Complete the message and **Send** it.

Tips:

- A file can also be inserted into a message by dragging the file from the desktop or from Windows Explorer and dropping it in the message.
- The attachment icon(s) can be placed anywhere within an e-mail. Simply drag and drop the icon where it should appear in the e-mail.

Warning:

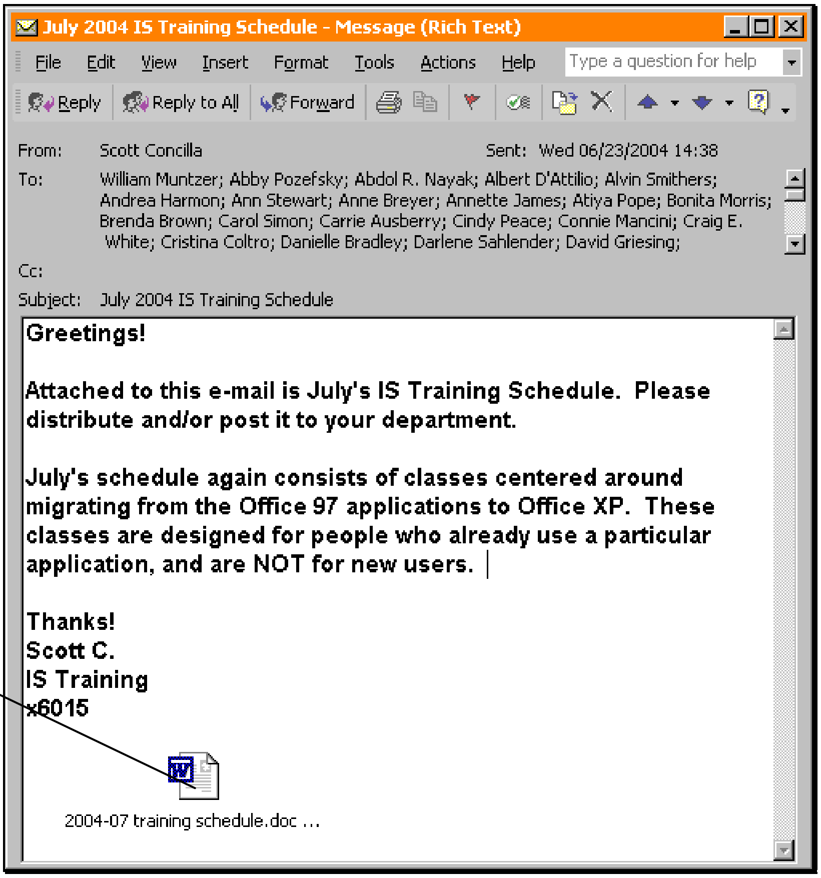
- **Information Services** has set restrictions on the types of files, the size, and the content that attachments may contain. If you are having difficulty sending or receiving attachments, please contact the C3 (x7821) for help and more information about the current restrictions.

Opening Message Attachments

Attachments that are received within a message can be viewed by opening the message attachment. This command does not automatically save the attachment. It only launches the application needed to view the attachment.

Depending on how the message was sent, attachments will appear in one of two places in the message window.

Messages sent in Outlook's Rich Text format (the default for PGW), will show attachment icons within the text of the message as they were inserted by the sender:



From: Scott Concilla

Sent: Wed 06/23/2004 14:38

To: William Muntzer; Abby Pozefsky; Abdol R. Nayak; Albert D'Attilio; Alvin Smithers; Andrea Harmon; Ann Stewart; Anne Breyer; Annette James; Atiya Pope; Bonita Morris; Brenda Brown; Carol Simon; Carrie Ausberry; Cindy Peace; Connie Mancini; Craig E. White; Cristina Coltro; Danielle Bradley; Darlene Sahlender; David Griesing;

Cc:

Subject: July 2004 IS Training Schedule

Greetings!

Attached to this e-mail is July's IS Training Schedule. Please distribute and/or post it to your department.

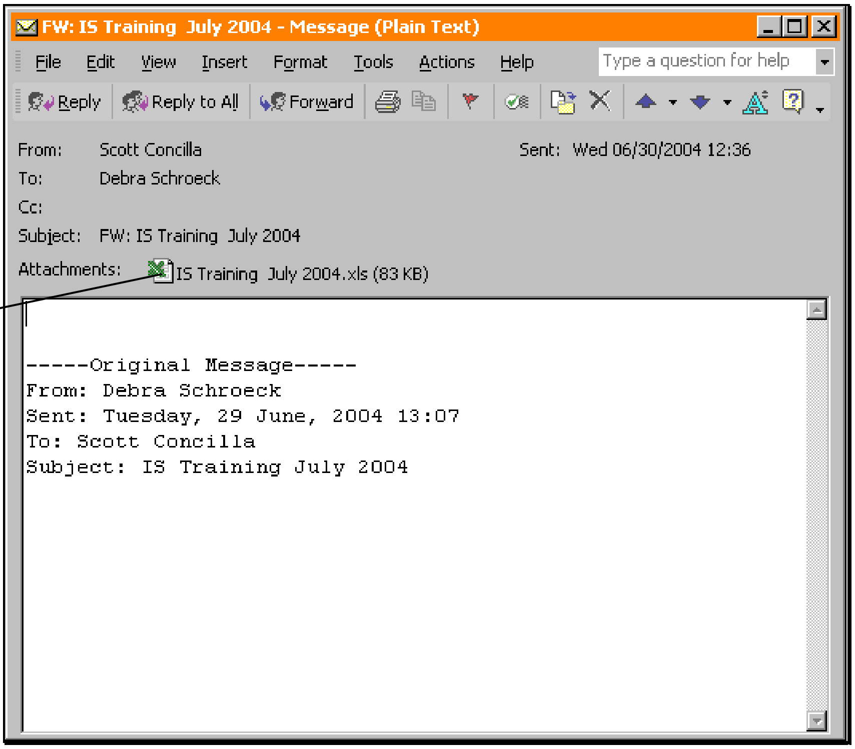
July's schedule again consists of classes centered around migrating from the Office 97 applications to Office XP. These classes are designed for people who already use a particular application, and are NOT for new users.

Thanks!
Scott C.
IS Training
x6015

2004-07 training schedule.doc ...

Attachment Icon

Messages that have been sent in HTML or plain text format will display attachment icons in the header of the message. E-mails received from the Internet users will often be in these formats.


FW: IS Training July 2004 - Message (Plain Text)
File
Edit
View
Insert
Format
Tools
Actions
Help
Type a question for help
Reply
Reply to All
Forward

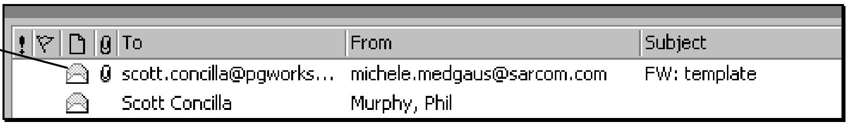
From: Scott Concilla
Sent: Wed 06/30/2004 12:36
To: Debra Schroeck
Cc:
Subject: FW: IS Training July 2004
Attachments: IS Training July 2004.xls (83 KB)

```
-----Original Message-----
From: Debra Schroeck
Sent: Tuesday, 29 June, 2004 13:07
To: Scott Concilla
Subject: IS Training July 2004
```

Attachment Icon

Procedure:

1. Open the message containing an attachment. In the message list, a paper clip icon displays in the attachment column.



!	▽	🗋	0	To	From	Subject
		✉	0	scott.concilla@pgworks...	michele.medgaus@sarcom.com	FW: template
		✉		Scott Concilla	Murphy, Phil	

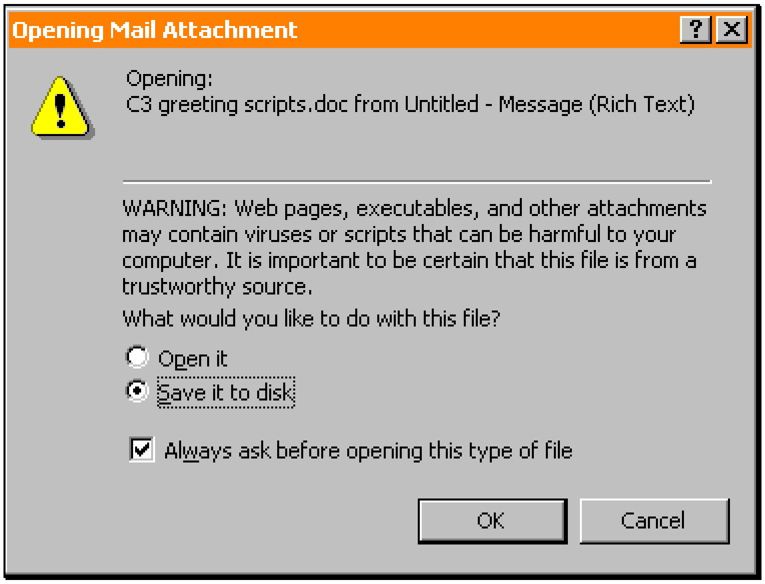
Message with an attachment

2. *Double*-click the attachment icon in the message.

OR

Right-click the attachment icon and choose **Open**.

3. Depending on the file type, Outlook displays a warning:



Opening:
C3 greeting scripts.doc from Untitled - Message (Rich Text)

WARNING: Web pages, executables, and other attachments may contain viruses or scripts that can be harmful to your computer. It is important to be certain that this file is from a trustworthy source.

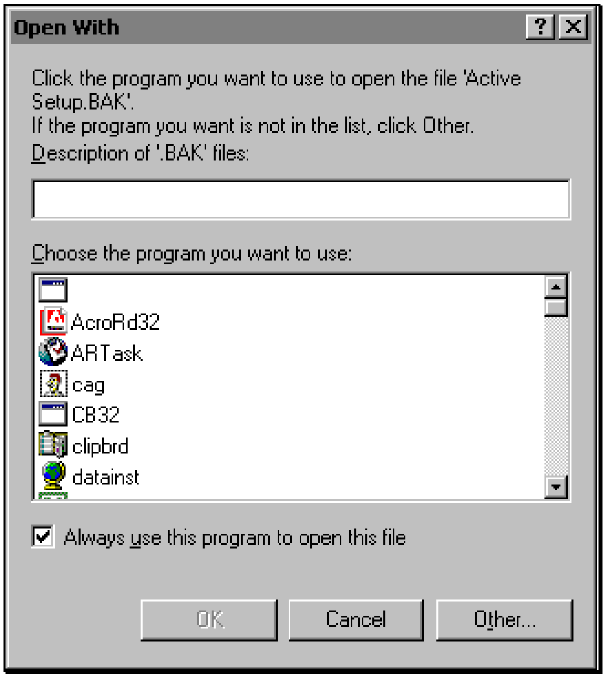
What would you like to do with this file?

○ Open it
● Save it to disk

☑ Always ask before opening this type of file

4. To open the file in its associated application, select **Open it** and then click **OK**. The associated application launches and the file displays within the application window.

5. If the application needed to open the attachment is not present, or if Outlook does not recognize the type of file, Outlook displays the **Open With** dialog box:



Click the program you want to use to open the file 'Active Setup.BAK'.
If the program you want is not in the list, click Other.
Description of '.BAK' files:

Choose the program you want to use:

☑ Always use this program to open this file

6. Click **Cancel** to return to the message. **Do not attempt to select an application from the list.**

Tips:

- The user must have the application associated with the attachment to view the attachment. For instance, Visio must be installed in order to open a Visio drawing.
- Although there is the option to clear the **Always ask before opening this type of file** check box, certain types of files will always open the warning dialog box regardless of the user's settings.

Warning:

- It is not advisable to open every attachment received. Attachments are the primary means of transmitting viruses. The Information Services department makes every effort to keep its virus-scanners and firewalls updated, however, there is always a chance of a virus getting through. **If you are ever unsure as to the source of an attachment, do not open it. If you are unsure as to why files are being sent to you, do not open them. Contact the C3 for help.**

Saving Attached Files

Opening an attachment does not save the file – it only opens the file to view and work with its contents. Saving an attachment to the file system allows the user to work on the file without having Outlook open.

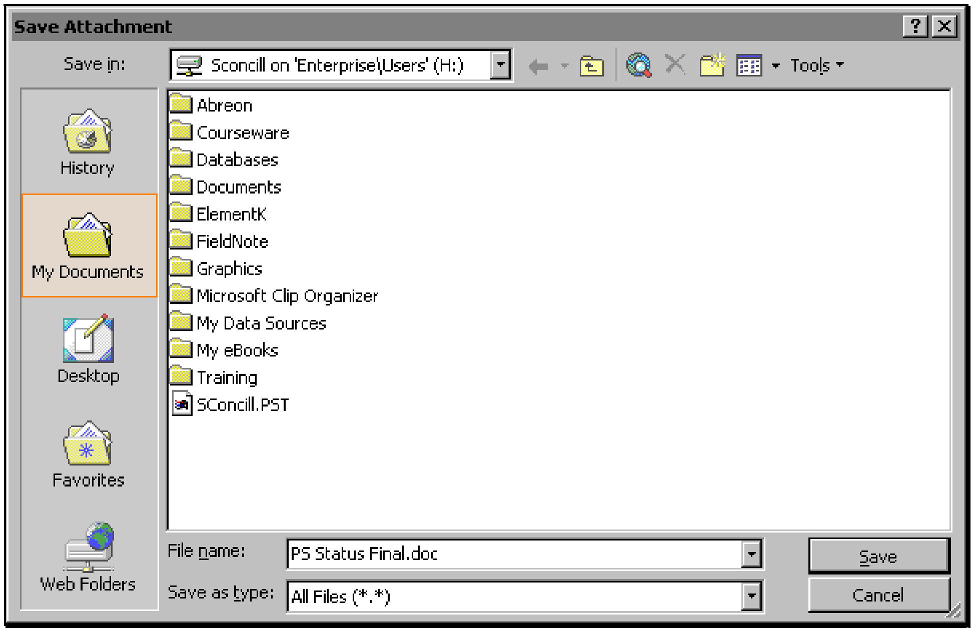
Attachments can be saved one at a time, or all attachments in a message can be saved at once.

Procedure: (To save one attachment)

1. Open the message that contains the attachment.
2. Select the **File** menu and choose **Save Attachments**.

OR

Right-click the attachment icon and choose **Save As**. The **Save Attachment** dialog box displays:



Save Attachment

Save in: Sconcill on 'Enterprise\Users' (H:)

Abreon
Courseware
Databases
Documents
ElementK
FieldNote
Graphics
Microsoft Clip Organizer
My Data Sources
My eBooks
Training
SConcill.PST

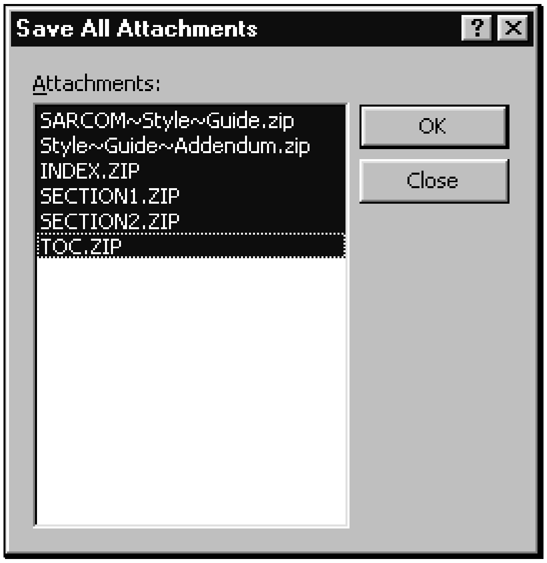
File name: PS Status Final.doc

Save as type: All Files (*.*)

3. Locate the drive and directory where the file should be saved. **Files should be stored on a network drive such as H: or S:, NOT the workstation's C: drive**.
4. Click **Save** when complete.

Procedure: (To save more than one attachment)

1. Open the message that contains the attachments to be saved.
2. Select the **File** menu and choose **Save Attachments**. The **Save All Attachments** dialog box displays:

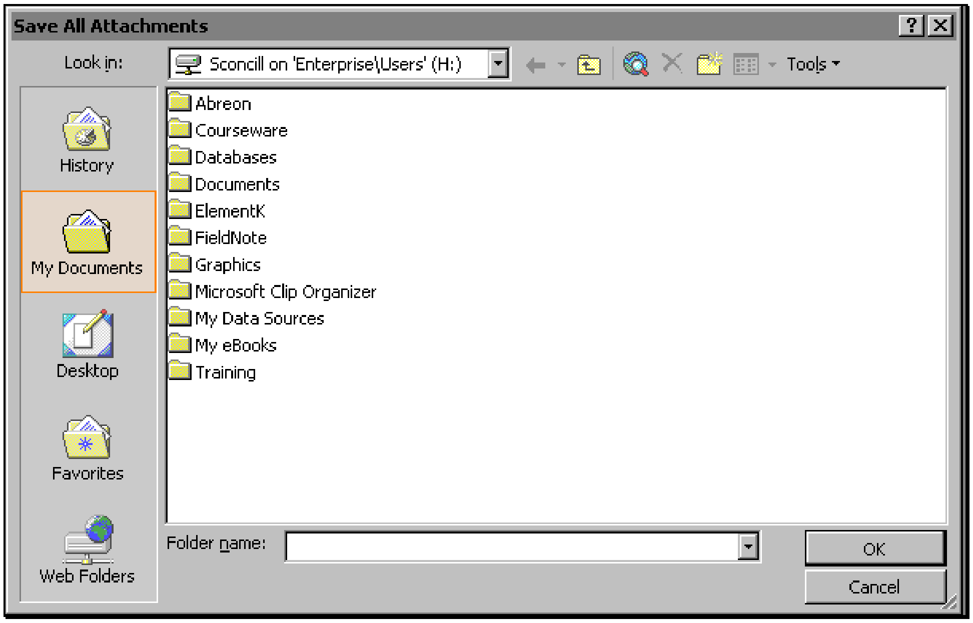


Save All Attachments
?
Attachments:
SARCOM~Style~Guide.zip
Style~Guide~Addendum.zip
INDEX.ZIP
SECTION1.ZIP
SECTION2.ZIP
TOC.ZIP
OK
Close

3. Click **OK** to select all the attachments.

OR

Using the mouse, select only the attachments from the **Attachments** list that should be saved and then click **OK**. The **Save All Attachments** dialog box displays:


Save All Attachments
? X
Tools
History
My Documents
Desktop
Favorites
Web Folders
Abreon
Courseware
Databases
Documents
ElementK
FieldNote
Graphics
Microsoft Clip Organizer
My Data Sources
My eBooks
Training
Folder name:
OK
Cancel

Look in: Sconcill on 'Enterprise\Users' (H:)

4. Locate the drive and directory where the files should be saved. **Files should be stored on a network drive such as H: or S:, NOT the workstation's C: drive**.

5. Click **OK** when complete.

Warning:

- Be careful not to confuse the **Save Attachments** command with the **Save** and **Save As** commands on the **File** menu. The Save and Save As commands are only effective for changes to a message within Outlook.

Modifying and Editing Attachments

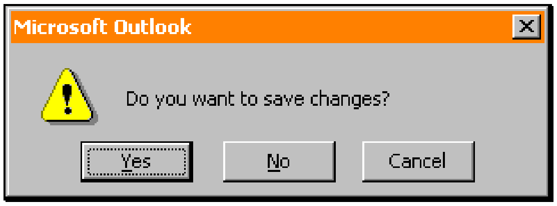
An often confusing subject is understanding what happens to an attachment when changes are made to it and then saved. Where do the changes get saved to? What happens to the original attachment?

When making changes to a received attachment the most important decision to make is to decide whether the changes should be saved to the original e-mail, or if the modified attachment should be saved somewhere else, such as the H: or S: drive.

Based on where the modified attachment should be stored, use one of the following procedures:

Procedure: (To save a modified attachment to the original e-mail)

1. Open the message that contains the attachment(s).
2. Open the attachment by *double*-clicking it and make the desired changes to the document.
3. **Save** the document and **Exit** the application. The original message will still be open in Outlook.
4. **Close** the message. Outlook displays a warning:



Do you want to save changes?

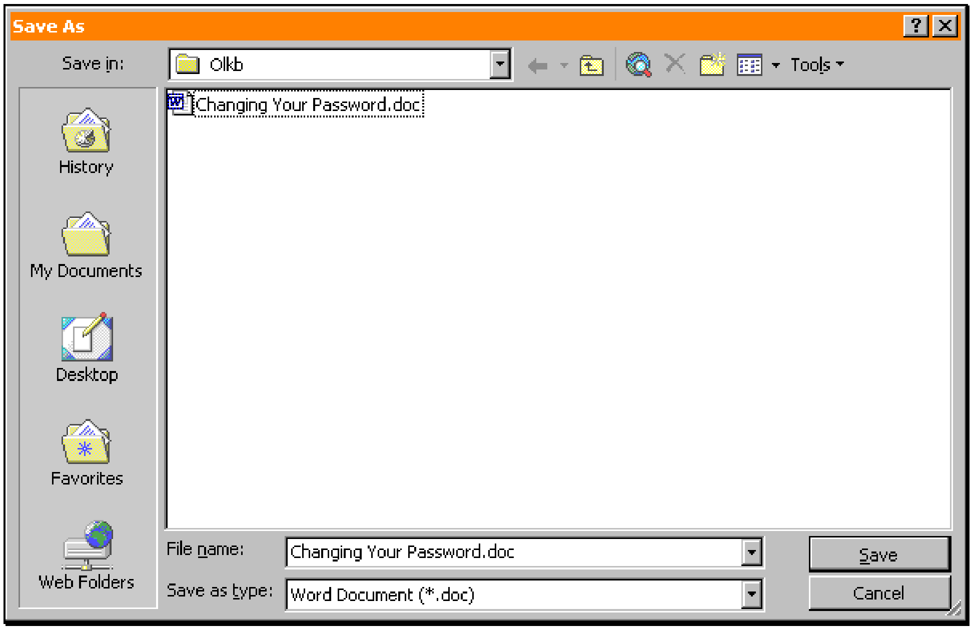
5. Click **Yes** to save the attachment changes to the e-mail. The modified attachment is now stored in the original e-mail.

Tip:

- A **Reply** to a message with an attachment will not include the attachment. To include the original attachment, or as described above, an attachment where changes were made and saved back to the original e-mail, use the **Forward** command.

Procedure: (To save a modified attachment to the file system)

1. Open the message that contains the attachment(s).
2. Open the attachment by *double*-clicking it.
3. Make the desired changes to the document.
4. Select the **File** menu of the application and choose **Save As**. The **Save As** window displays:



Changing Your Password.doc

File name: Changing Your Password.doc

Save as type: Word Document (*.doc)

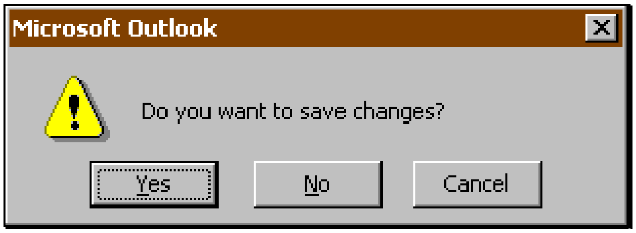
5. Use the **Save in** drop-down or the shortcut buttons to navigate to directory or folder where the revised document should be saved and click **Save**. Documents for personal use should be stored on the H: drive. Documents that are shared with other users in a group or department should be stored on the S: drive. **DO NOT SAVE ATTACHMENTS TO THE C: DRIVE**.
6. **Exit** the application.
7. The original message will still be open in Outlook.
8. **Close** the message. The original message still contains the original unchanged attachment.

Deleting an Attachment

Attachments can be deleted from messages without deleting the entire message. This will help save space in Outlook, as attachments are often large. If the attachment is still needed, it should first be saved to a network drive, as described in the previous procedure.

Procedure:

1. Open the message that contains the attachment(s) that should be deleted.
2. Select the attachment icon in the message.
3. Press the **[Delete]** key.
4. The attachment icon will be removed from the message. Repeat this process to remove multiple attachments.
5. **Close** the message. Outlook displays a warning:



Microsoft Outlook

Do you want to save changes?

6. Click **Yes** to save the changes. To return to the message and continue to work, click **Cancel**. To close the message and revert back to the original, click **No**.

Tip:

- If an attachment is accidentally deleted, close the message without saving changes or use the **Undo** command before closing the message.

Sending Attachments Using Other Office Programs

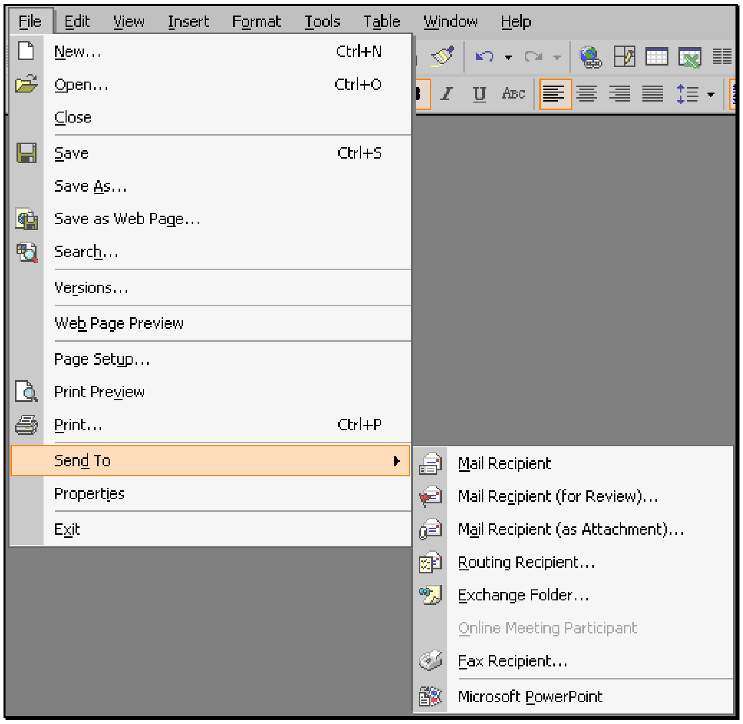
All of the programs in the Microsoft Office suite offer the ability to send a document directly from the application. This is also known as the **Send To** command within Office. This command is found under the **File** menu of most Office applications.

In Office XP, several changes were made to how documents are sent to other users, including some new commands, and changes to way previous commands worked.

Additionally, Office XP now provides an **E-mail** button on the Standard toolbar of documents for sending files. However, this command tends to cause confusion with users who are not familiar with its fields and how to turn it on and off.

Procedure: (Using the Send To menu)

1. Open the document to be sent.
2. Select the **File** menu and choose **Send To**.

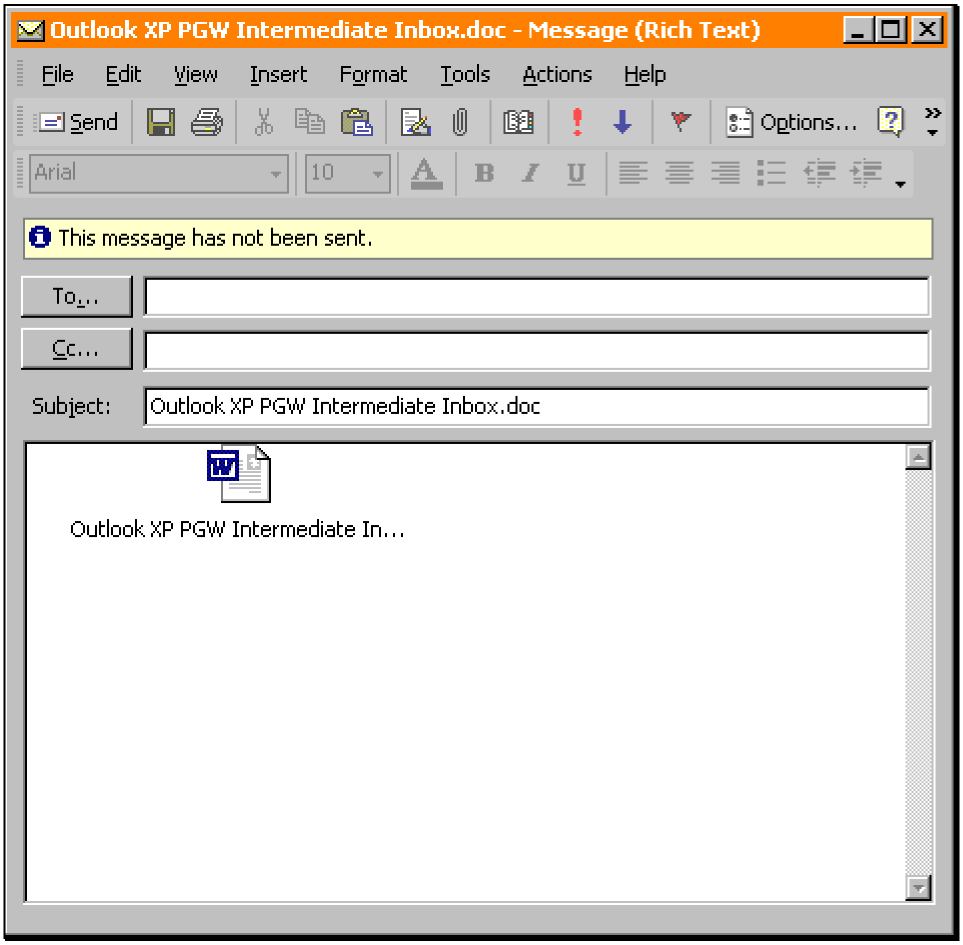

File
Edit
View
Insert
Format
Tools
Table
Window
Help
New... Ctrl+N
Open... Ctrl+O
Close
Save Ctrl+S
Save As...
Save as Web Page...
Search...
Versions...
Web Page Preview
Page Setup...
Print Preview
Print... Ctrl+P
Send To
Properties
Exit
Mail Recipient
Mail Recipient (for Review)...
Mail Recipient (as Attachment)...
Routing Recipient...
Exchange Folder...
Online Meeting Participant
Fax Recipient...
Microsoft PowerPoint

3. The following table explains the some of the different **Send To** options when sending a document to another user:

Option	Description
Mail Recipient	Inserts the contents of the file as text into the body of the message and displays the e-mail header fields as a toolbar in the application. This is also the same as clicking on the **E-mail** button in the Standard toolbar. In previous versions of Office, this was the "default choice", and performed what the **Mail Recipient as Attachment** command currently does.
Mail Recipient (for Review)	Attaches the file to the e-mail and turns on the Reviewing features (also known as Track Changes) for the file. When a recipient receives the file, the reviewing tools are enabled and displayed. Files returned from reviewers will automatically prompt to merge changes. Use the reviewing tools to accept or reject the changes.
Mail Recipient (as Attachment)	Attaches a file to an e-mail in the traditional manner of Outlook by displaying an icon in an e-mail representing the file. This command was formerly known in Office as simply **Send To, Mail Recipient**.
Routing Recipient	Forwards the file to the next Routing Recipient as determined by the attached Routing Slip. If no routing slip is present, one can be generated and the file can be sent to the first recipient in the list.

4. Unless the Reviewing and Track Changes features are desired, **Mail Recipient (as Attachment)** should be the standard choice for sending a file to another user.

5. A standard Outlook message window displays with the file as an attachment icon in the message:


File
Edit
View
Insert
Format
Tools
Actions
Help
Send
Options...
Arial
10
To...
Cc...

Outlook XP PGW Intermediate Inbox.doc - Message (Rich Text)

This message has not been sent.

Subject: Outlook XP PGW Intermediate Inbox.doc

Outlook XP PGW Intermediate In...

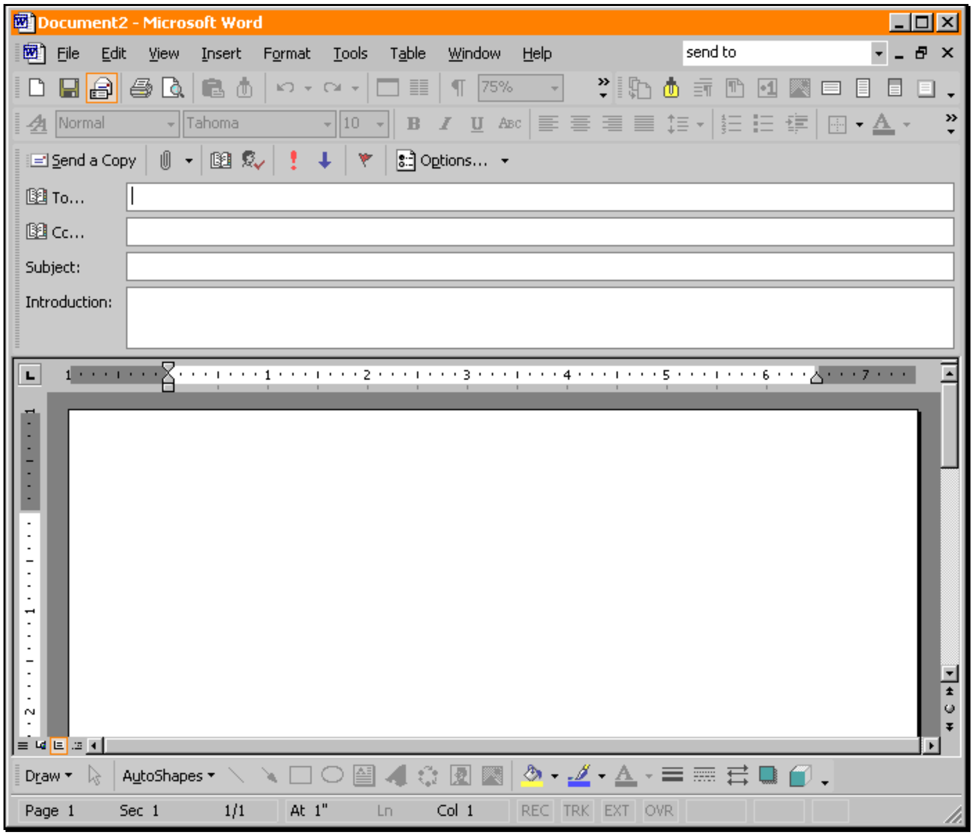
6. Address and complete the message and **Send** it.

Procedure: (Using the E-mail button)

1. Open the document to be sent.

2. Click the **E-mail** button on the **Standard** toolbar.

3. The e-mail fields display in the document header:


Document2 - Microsoft Word
File Edit View Insert Format Tools Table Window Help
send to
Normal Tahoma 10
Send a Copy
Options...
To...
Cc...
Subject:
Introduction:
Draw AutoShapes
Page 1 Sec 1 1/1 At 1" Ln Col 1 REC TRK EXT OVR

4. Address the message using the **To** and **Cc** fields.
5. The **Subject** field displays the current document name.
6. In the **Introduction** field, type a short text message describing the document and the reason it is being sent.
7. Add any other **Options** as desired for the message.
8. Click **Send a Copy** to deliver a copy of the document to the receiver's Inbox.

Tip:

- The **E-mail** button is a toggle button. To turn off the e-mail fields, click the button again.

Chapter 3

Working with Distribution Lists

Chapter Objectives:

- Understanding Distribution Lists and Groups
- Creating a Distribution List
- Viewing the Members of a Distribution List
- Modifying a Distribution List
- Adding Internet E-mail Addresses to a Distribution List
- Deleting a Distribution List
- Sending E-mail to a Distribution List or Group
- Hiding Addresses When Using a Distribution List

Overview

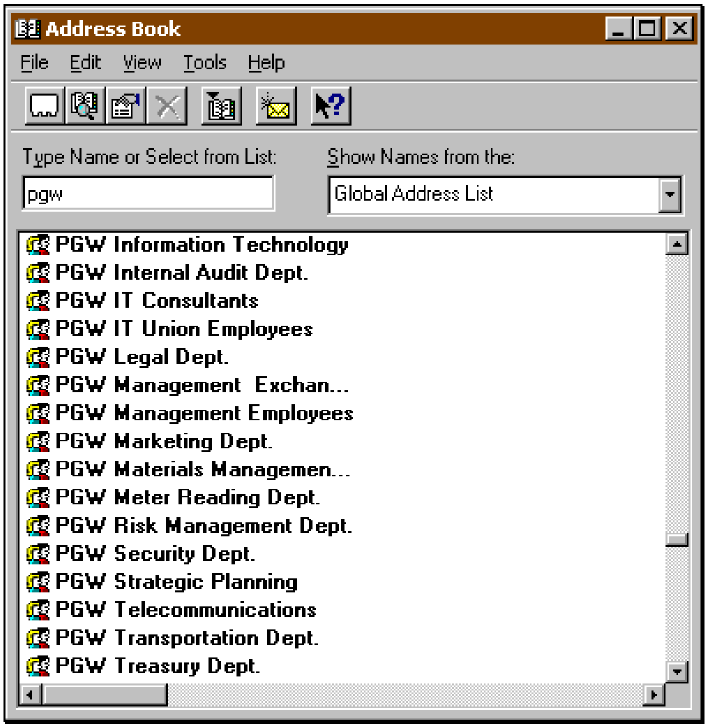
Distribution lists and groups save the user from having to address a message to the same group of people over and over again. Once created, a distribution list can be used to quickly address a message to a group of users.

This chapter will discuss how to create, use, and modify distribution lists.

Understanding Distribution Groups and Lists

Distribution lists and groups are basically the same feature. Both are a collection of e-mail addresses under a single name that makes it easy to send to a group of users. The distinguishing feature between lists and groups is where they are stored in the Address Book.

Distribution Groups are created by the Exchange administrator. They are available to any user on the local Exchange server, and appear in the Global Address List section of the Address Book in bold print with a distribution group icon next to the group name.



pgw

Global Address List

PGW Information Technology
PGW Internal Audit Dept.
PGW IT Consultants
PGW IT Union Employees
PGW Legal Dept.
PGW Management Exchan...
PGW Management Employees
PGW Marketing Dept.
PGW Materials Managemen...
PGW Meter Reading Dept.
PGW Risk Management Dept.
PGW Security Dept.
PGW Strategic Planning
PGW Telecommunications
PGW Transportation Dept.
PGW Treasury Dept.

Distribution Groups in the Global Address List

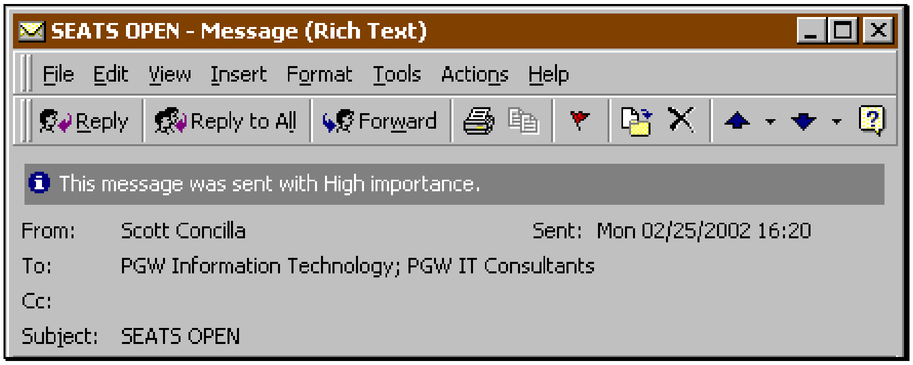
Since the administrator creates the distribution groups, individual users cannot make changes to the membership of the group.

Chapter 3 – Working with Distribution Lists

Distribution Lists are created by individual users and are stored in the Outlook Contacts folder. A user can create as many lists as they wish, however, distribution lists cannot be shared with other users.

Like a distribution group, a distribution list entry in the Address Book will be in bold print and have the distribution list icon next to the name.

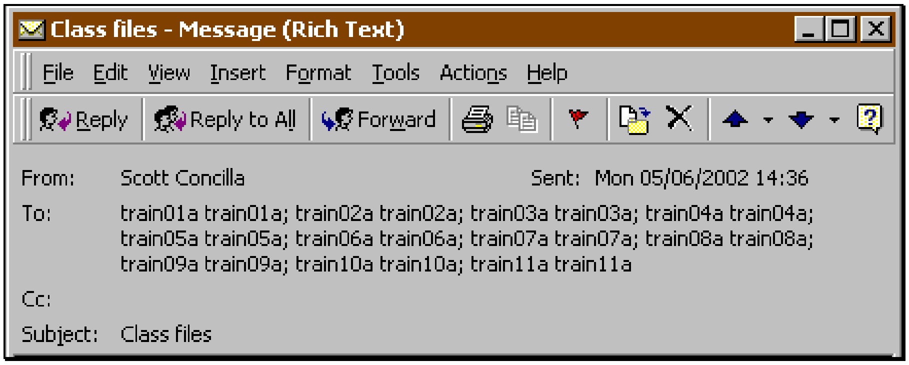
Another difference between lists and groups is how e-mails sent to a list appear to the receiver. When a distribution group is used, the receivers of the message will only see the group name in the **To** section of the message header.


SEATS OPEN - Message (Rich Text)
File Edit View Insert Format Tools Actions Help
Reply Reply to All Forward

This message was sent with High importance.

From: Scott Concilla
Sent: Mon 02/25/2002 16:20
To: PGW Information Technology; PGW IT Consultants
Cc:
Subject: SEATS OPEN

If a distribution list is used, the **To** section of message header will contain all of the addresses in the list.


Class files - Message (Rich Text)
File Edit View Insert Format Tools Actions Help
Reply Reply to All Forward

From: Scott Concilla
Sent: Mon 05/06/2002 14:36
To: train01a train01a; train02a train02a; train03a train03a; train04a train04a; train05a train05a; train06a train06a; train07a train07a; train08a train08a; train09a train09a; train10a train10a; train11a train11a
Cc:
Subject: Class files

Creating a Distribution List

Individual users can create their own distribution lists for sending e-mail to consistent groups of users. Distribution lists are stored in Outlook Contacts, and can be accessed via the Address Book.

There are several ways to start the process of creating a new distribution list.

Procedure:

1. Open the Address Book. From the Address Book toolbar, click the **New Entry** button.

   OR

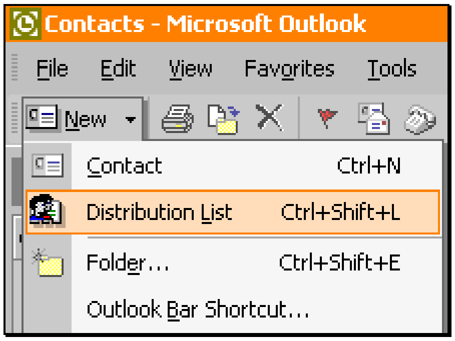
   Open the Address Book. From the **File** menu, choose **New Entry**.

   OR

   Select the **Contacts** folder. From the **File** menu, choose **New** and then **Distribution List**.

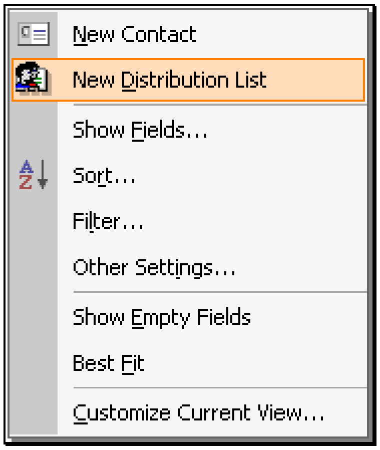
   OR

   Select the **Contacts** folder. Click the right side of the **New** button and then select **Distribution List**.

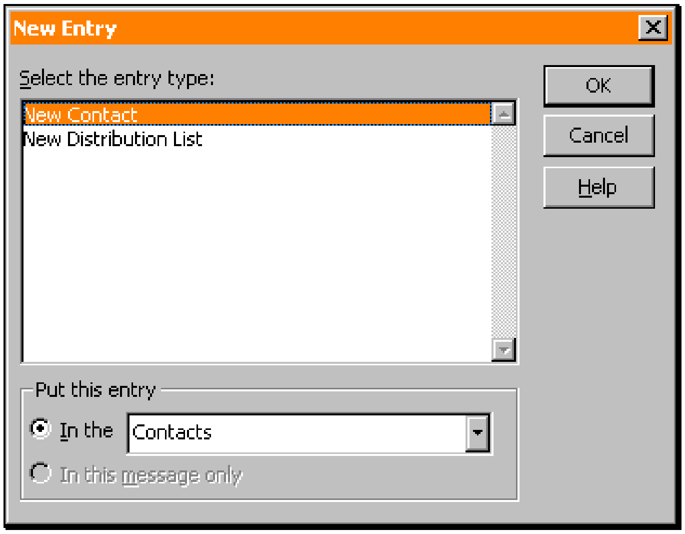

Contacts - Microsoft Outlook
File
Edit
View
Favorites
Tools
New
Contact Ctrl+N
Distribution List Ctrl+Shift+L
Folder... Ctrl+Shift+E
Outlook Bar Shortcut...

   OR

   Select the **Contacts** folder. *Right*-click in any empty space in the Contacts listing and choose **New Distribution List**.


New Contact
New Distribution List
Show Fields…
Sort…
Filter…
Other Settings…
Show Empty Fields
Best Fit
Customize Current View…

The **New Entry** dialog box displays:


New Entry
Select the entry type:
New Contact
New Distribution List
Put this entry
OK
Cancel
Help

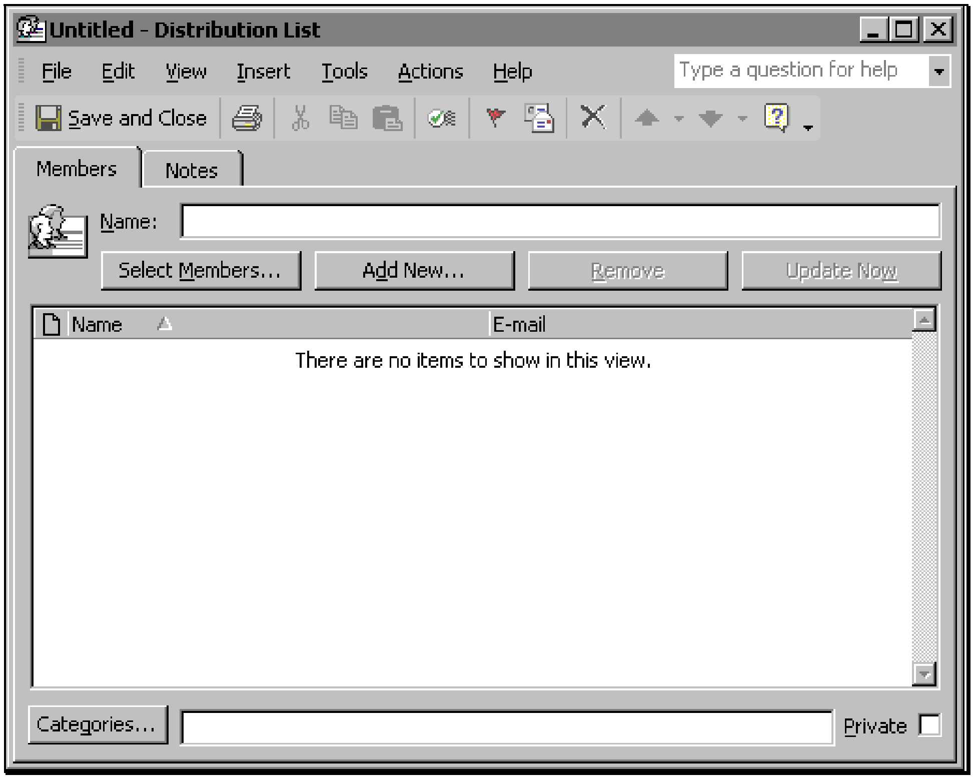
● In the Contacts

○ In this message only

2. Select **New Distribution List** from the entry type list.

3. In the **Put this entry** section, make sure **Contacts** is selected.

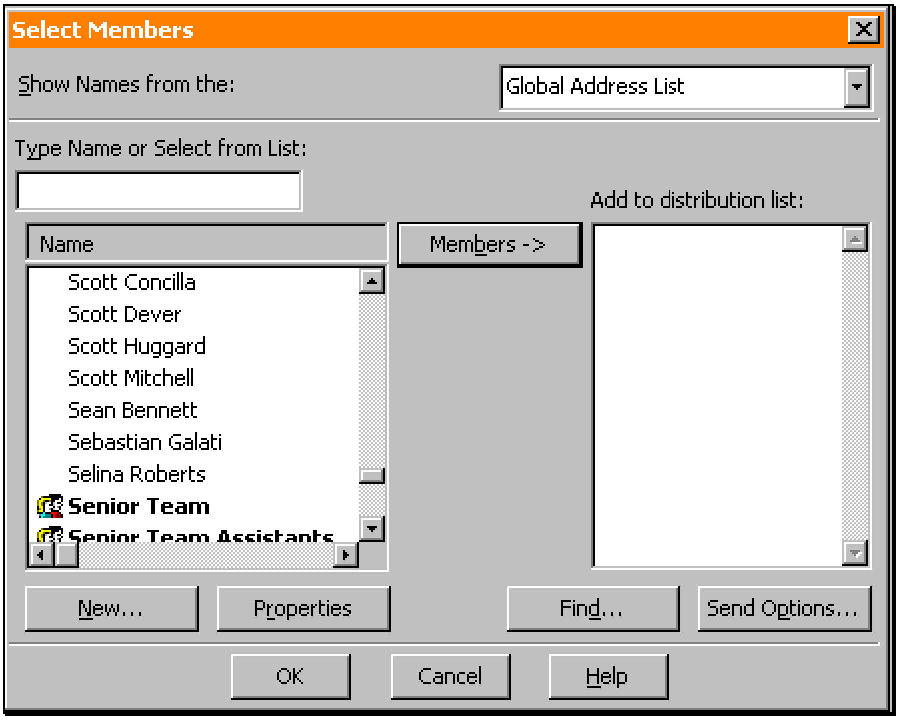
4. Click **OK**. The **Distribution List** window displays:


Untitled - Distribution List
File
Edit
View
Insert
Tools
Actions
Help
Type a question for help
Save and Close
Members
Notes
Name:
Select Members...
Add New...
Remove
Update Now
Name
E-mail
Categories...
Private

There are no items to show in this view.

5. In the **Name** box, type a name for the list.

6. Click **Select Members**. The **Select Members** dialog box displays:

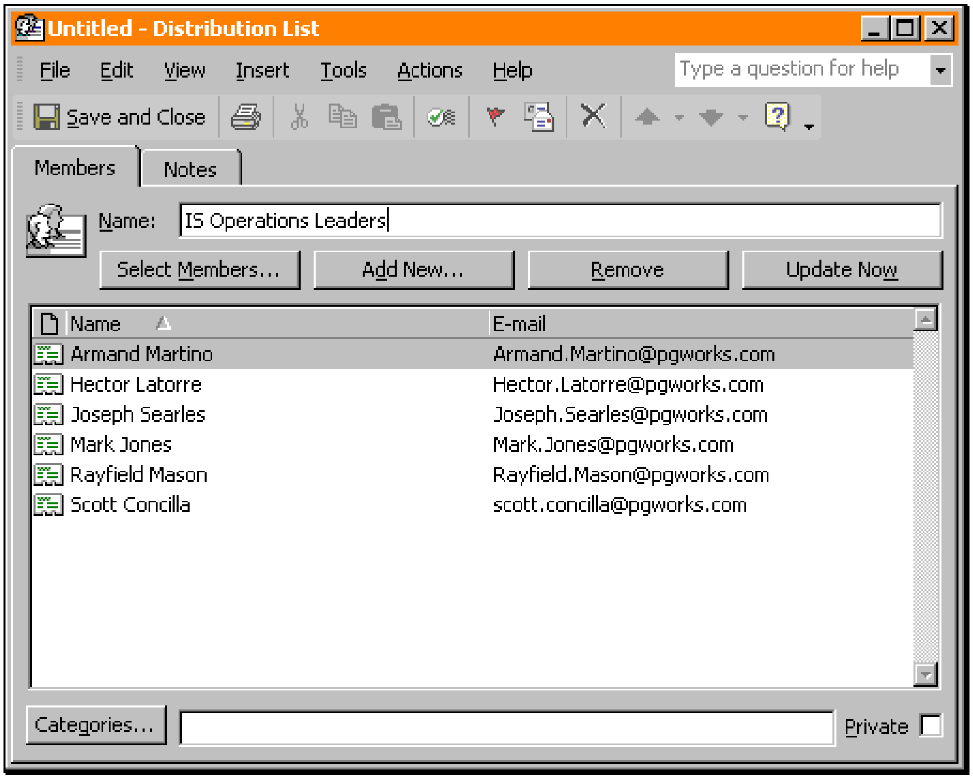

Select Members
Show Names from the:
Type Name or Select from List:
Add to distribution list:
Name
Members ->
New...
Properties
Find...
Send Options...
OK
Cancel
Help

Global Address List

Scott Concilla
Scott Dever
Scott Huggard
Scott Mitchell
Sean Bennett
Sebastian Galati
Selina Roberts
Senior Team
Senior Team Assistants

7. Select names from the Global Address List or Outlook Contacts and add them to the distribution list by clicking the **Members** button.

8. When completed, click **OK**. The **Distribution List** window displays again with the members listed:


Untitled - Distribution List
File
Edit
View
Insert
Tools
Actions
Help
Type a question for help
Save and Close
Members
Notes
Select Members...
Add New...
Remove
Update Now
Categories...
Private ☐

Name: IS Operations Leaders

Name	E-mail
Armand Martino	Armand.Martino@pgworks.com
Hector Latorre	Hector.Latorre@pgworks.com
Joseph Searles	Joseph.Searles@pgworks.com
Mark Jones	Mark.Jones@pgworks.com
Rayfield Mason	Rayfield.Mason@pgworks.com
Scott Concilla	scott.concilla@pgworks.com

9. Click **Save and Close** to finish creating the list.

Tips:

- **Information Services** has imposed a limit of 100 members per distribution list. If the number of members in a distribution list will exceed 100, create another list with the additional members.
- There is no limit on the number of distribution lists a user may have.
- Distribution lists cannot be shared with other users.

Viewing the Members of a Distribution List

A user can view the members of any distribution list or group at any time, whether it is in an e-mail, the Address Book, or Outlook Contacts.

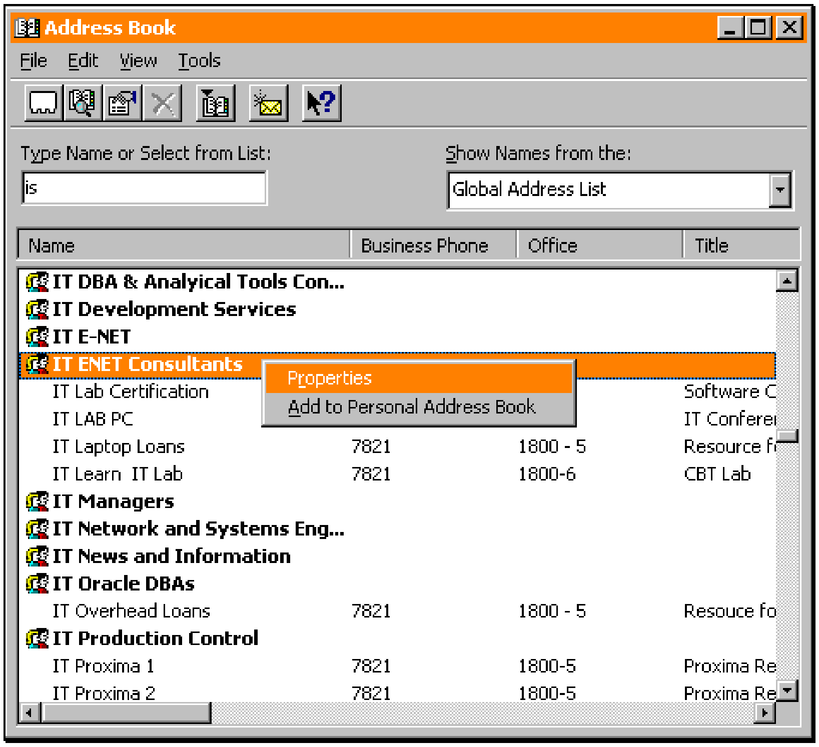
Procedure: (To view from the Address Book)

1. Open the Address Book and select the distribution group or list name.

2. Select the **File** menu and choose **Properties**.

OR

Right-click the list name and choose **Properties**.

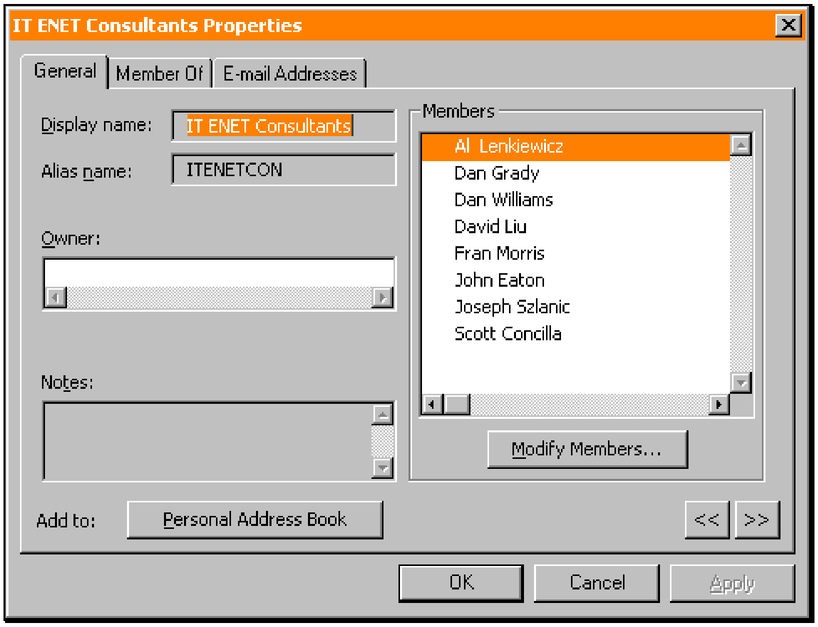


Type Name or Select from List: is

Show Names from the: Global Address List

Name	Business Phone	Office	Title
IT DBA & Analyical Tools Con...			
IT Development Services			
IT E-NET			
IT ENET Consultants			
IT Lab Certification			Software C
IT LAB PC			IT Conferei
IT Laptop Loans	7821	1800 - 5	Resource fi
IT Learn IT Lab	7821	1800-6	CBT Lab
IT Managers			
IT Network and Systems Eng...			
IT News and Information			
IT Oracle DBAs			
IT Overhead Loans	7821	1800 - 5	Resouce fo
IT Production Control			
IT Proxima 1	7821	1800-5	Proxima Re
IT Proxima 2	7821	1800-5	Proxima Re

3. The **Properties** dialog box with the members of the list displays:


IT ENET Consultants Properties
General
Member Of
E-mail Addresses
Owner:
Notes:
Modify Members...
Personal Address Book
<<
>>
OK
Cancel
Apply

Display name: IT ENET Consultants

Alias name: ITENETCON

Members:
- Al Lenkiewicz
- Dan Grady
- Dan Williams
- David Liu
- Fran Morris
- John Eaton
- Joseph Szlanic
- Scott Concilla

Add to: Personal Address Book

4. Click **OK** to close the **Properties** dialog box and return to the Address Book.

Procedure: (To view from Outlook Contacts)

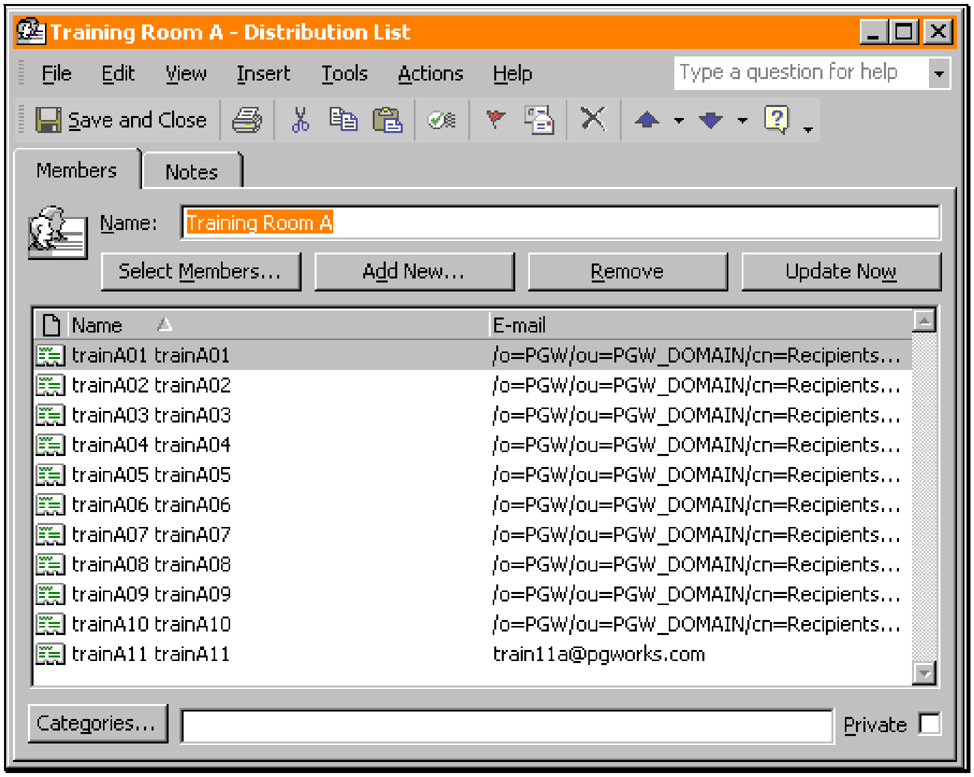
1. Open the Outlook Contacts folder and select the desired distribution list.
2. Select the **File** menu, choose **Open**, then **Selected Items**.

OR

Right-click the name of the list and choose **Open**.

OR

Double-click the list name. The **Distribution List** window displays:


Training Room A - Distribution List
File
Edit
View
Insert
Tools
Actions
Help
Type a question for help
Save and Close
Members
Notes
Select Members...
Add New...
Remove
Update Now
Categories...
Private ☐

Name: Training Room A

Name	E-mail
trainA01 trainA01	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA02 trainA02	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA03 trainA03	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA04 trainA04	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA05 trainA05	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA06 trainA06	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA07 trainA07	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA08 trainA08	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA09 trainA09	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA10 trainA10	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA11 trainA11	train11a@pgworks.com

3. **Close** the window when finished.

Tip:

- If the distribution list name to view is in the header of an e-mail, the **File**, **Properties** command does not display the list members. Use the *right-*click **Properties** menu to see the members.

Chapter 3 – Working with Distribution Lists

Modifying a Distribution List

Over time, it may be necessary to add or delete members from a distribution list. Only an administrator can make changes to distribution groups that are found in the Global Address List.

Procedure: (To add members)

1. In Outlook Contacts, select the distribution list to be modified.

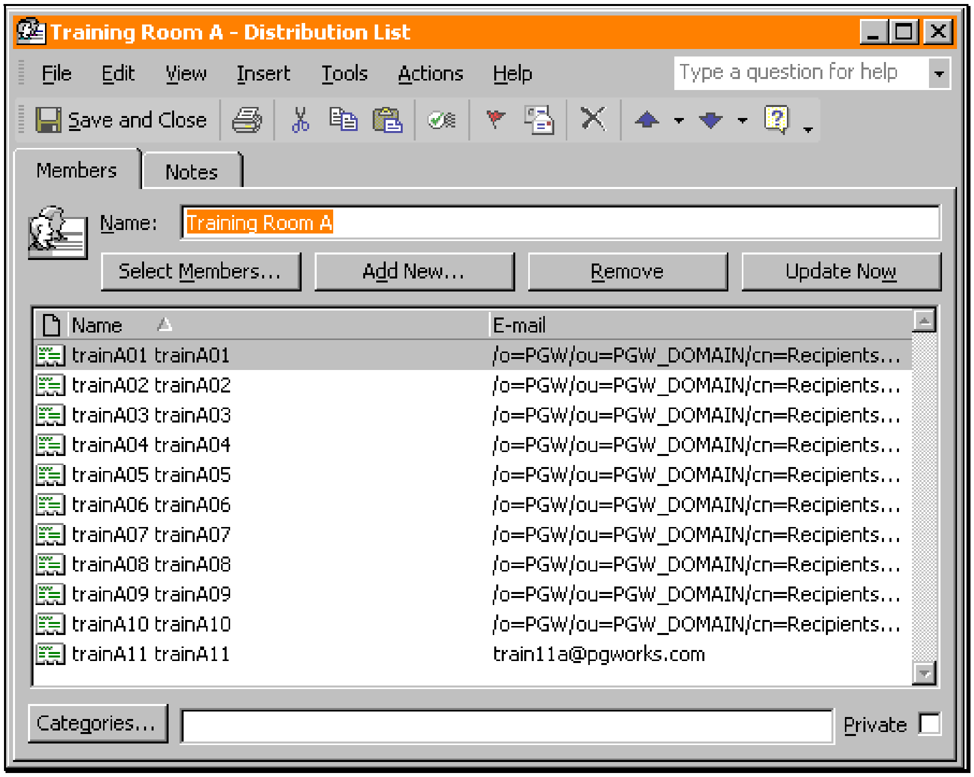
2. Select the **File** menu, choose **Open**, then **Selected Items**.

OR

Right-click the name of the list and choose **Open**.

OR

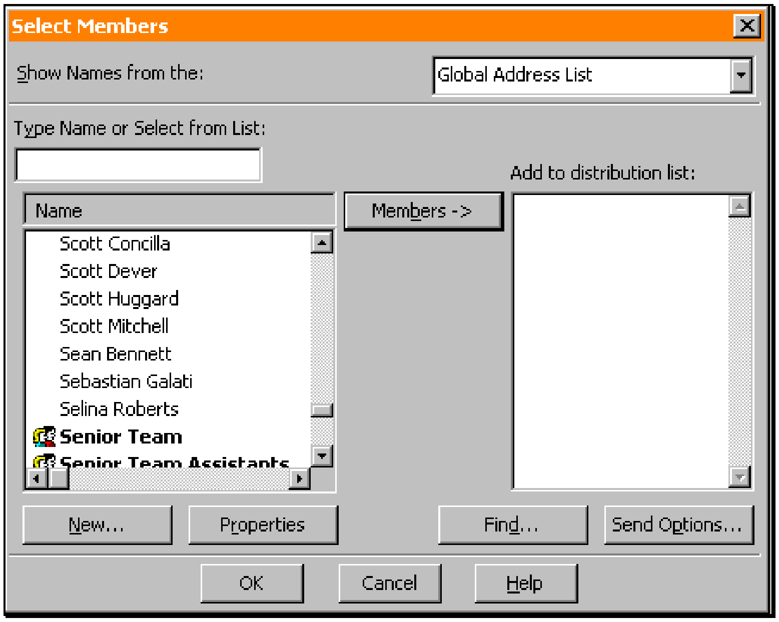
Double-click the list name. The **Distribution List** window displays:


Training Room A - Distribution List
File
Edit
View
Insert
Tools
Actions
Help
Type a question for help
Save and Close
Members
Notes
Select Members...
Add New...
Remove
Update Now
Categories...
Private ☐

Name: Training Room A

Name	E-mail
trainA01 trainA01	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA02 trainA02	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA03 trainA03	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA04 trainA04	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA05 trainA05	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA06 trainA06	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA07 trainA07	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA08 trainA08	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA09 trainA09	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA10 trainA10	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA11 trainA11	train11a@pgworks.com

3. Click **Select Members**. The **Select Members** dialog box displays:

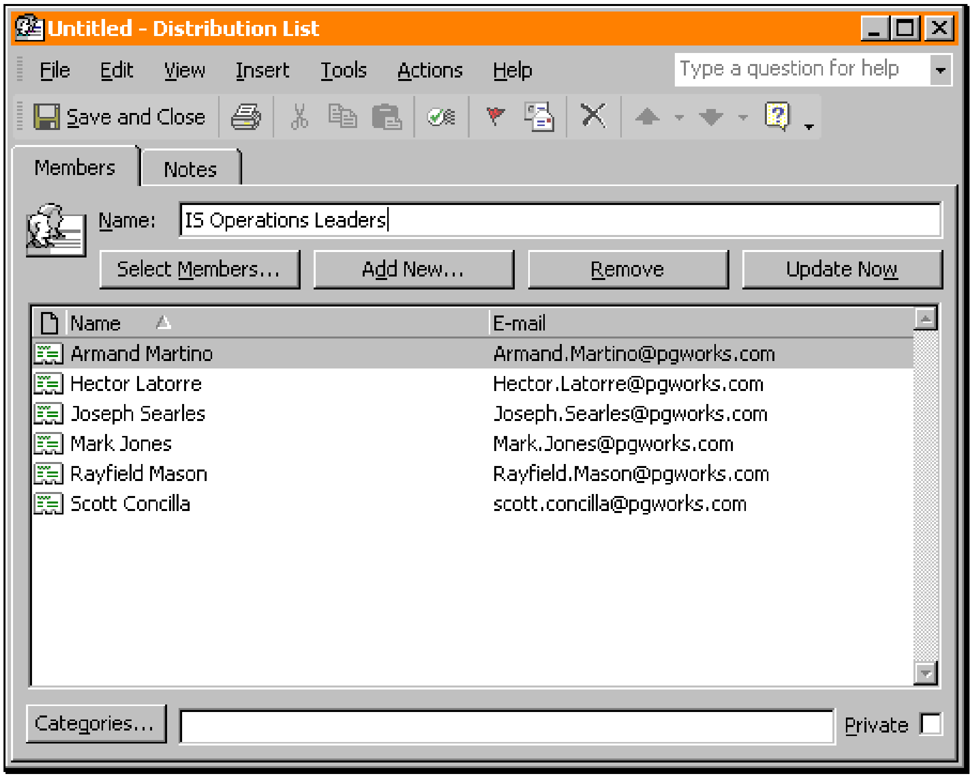

Select Members
Show Names from the:
Type Name or Select from List:
Add to distribution list:
Members ->
New...
Properties
Find...
Send Options...
OK
Cancel
Help

Show Names from the: Global Address List

Name
Scott Concilla
Scott Dever
Scott Huggard
Scott Mitchell
Sean Bennett
Sebastian Galati
Selina Roberts
Senior Team
Senior Team Assistants

4. Select names from the Global Address List or Outlook Contacts and add them to the distribution list by clicking the **Members** button.

5. When completed, click **OK**. The **Distribution List** window displays again with the newly added members listed:


Untitled - Distribution List
File
Edit
View
Insert
Tools
Actions
Help
Type a question for help
Save and Close
Members
Notes
Select Members...
Add New...
Remove
Update Now
Categories...
Private

Name: IS Operations Leaders

Name	E-mail
Armand Martino	Armand.Martino@pgworks.com
Hector Latorre	Hector.Latorre@pgworks.com
Joseph Searles	Joseph.Searles@pgworks.com
Mark Jones	Mark.Jones@pgworks.com
Rayfield Mason	Rayfield.Mason@pgworks.com
Scott Concilla	scott.concilla@pgworks.com

Private ☐

6. Click **Save and Close** to save changes.

Procedure: (To delete members)

1. In Outlook Contacts, select the distribution list to be modified.

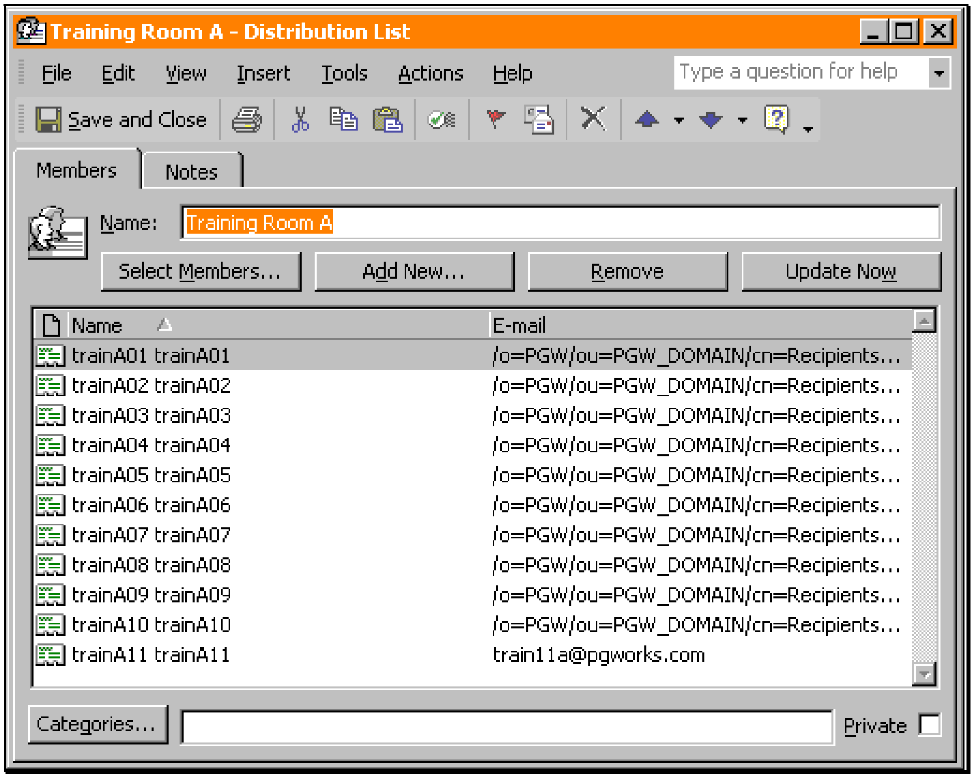
2. Select the **File** menu, choose **Open**, then **Selected Items**.

OR

Right-click the name of the list and choose **Open**.

OR

Double-click the list name. The **Distribution List** window displays:


Training Room A - Distribution List
File
Edit
View
Insert
Tools
Actions
Help
Type a question for help
Save and Close
Members
Notes
Select Members...
Add New...
Remove
Update Now
Categories...
Private

Name: Training Room A

Name	E-mail
trainA01 trainA01	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA02 trainA02	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA03 trainA03	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA04 trainA04	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA05 trainA05	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA06 trainA06	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA07 trainA07	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA08 trainA08	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA09 trainA09	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA10 trainA10	/o=PGW/ou=PGW_DOMAIN/cn=Recipients...
trainA11 trainA11	train11a@pgworks.com

3. Select the member(s) to be deleted and click **Remove**.

4. Click **Save and Close** to save changes.

Adding Internet E-mail Addresses to a Distribution List

A distribution list can contain addresses both from the internal Global Address List, and from outside users with Internet e-mail addresses.

Procedure: (To add an Internet address entry)

1. In Outlook Contacts, select the distribution list to be modified.

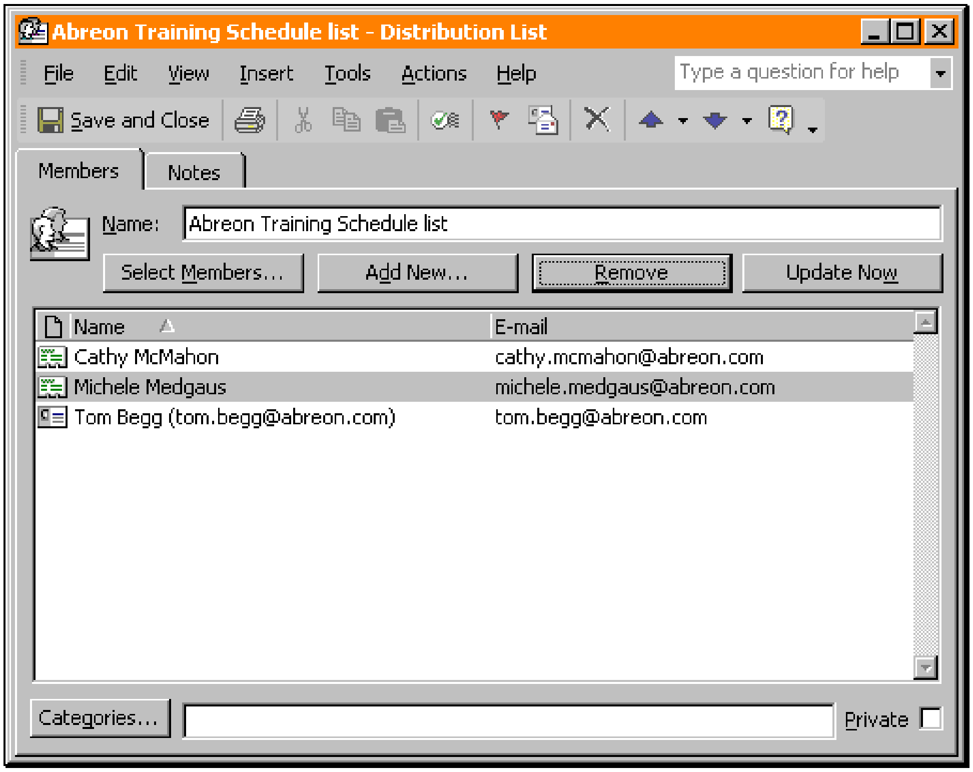
2. Select the **File** menu, choose **Open**, then **Selected Items**.

OR

Right-click the name of the list and choose **Open**.

OR

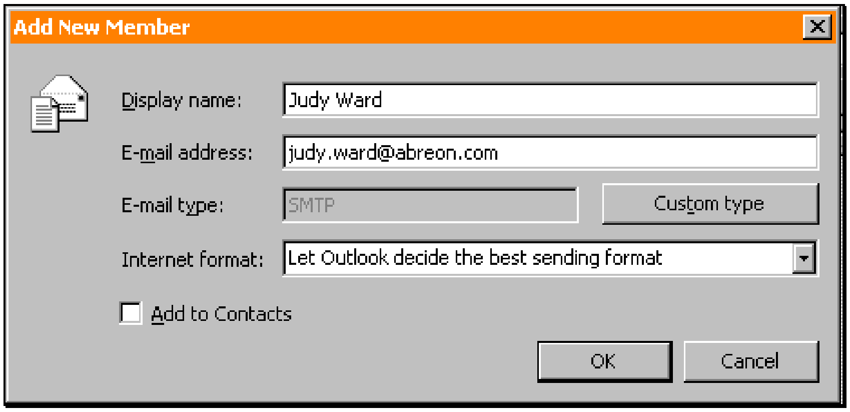
Double-click the list name. The **Distribution List** window displays:


Abreon Training Schedule list - Distribution List
File
Edit
View
Insert
Tools
Actions
Help
Type a question for help
Save and Close
Members
Notes
Select Members...
Add New...
Remove
Update Now
Categories...
Private ☐

Name: Abreon Training Schedule list

Name	E-mail
Cathy McMahon	cathy.mcmahon@abreon.com
Michele Medgaus	michele.medgaus@abreon.com
Tom Begg (tom.begg@abreon.com)	tom.begg@abreon.com

3. Click **Add New**. The **Add New Member** dialog box displays:



Add New Member
Custom type
OK
Cancel

Display name: Judy Ward
E-mail address: judy.ward@abreon.com
E-mail type: SMTP
Internet format: Let Outlook decide the best sending format
☐ Add to Contacts

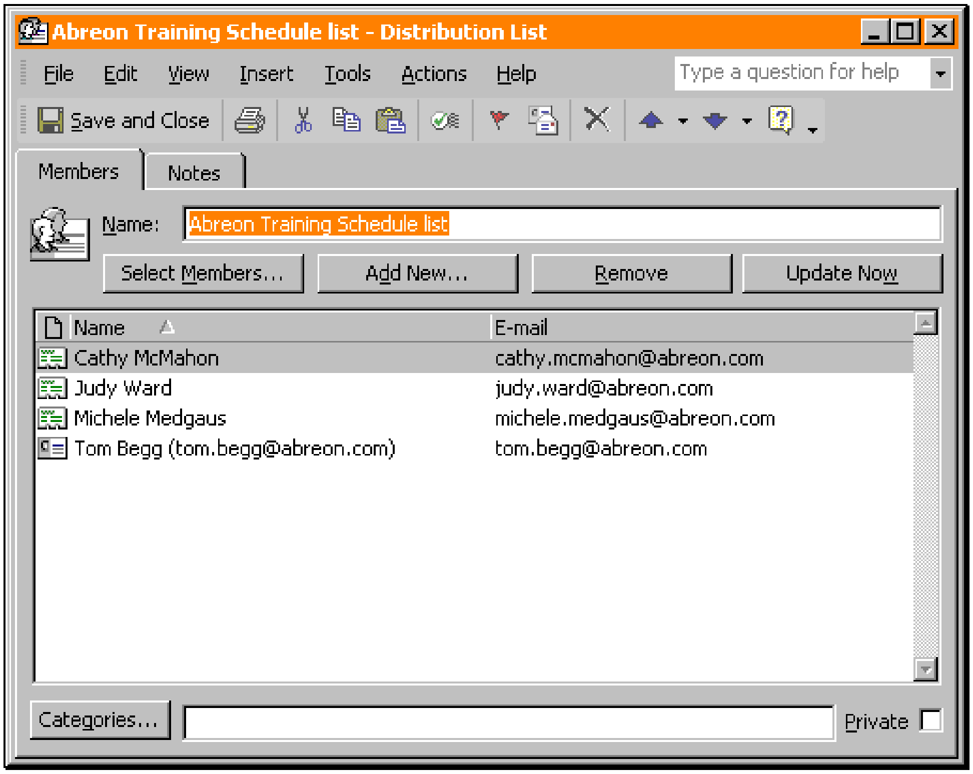
4. Type a **Display name** for the address. A **Display name** is a "friendly-style" name that will appear in the list instead of the actual e-mail address.

5. Type the **E-mail address** for the contact.

6. If desired, select the **Add to Contacts** check box to have the new member automatically added to the Outlook Contacts folder.

7. Click **OK** when completed.

8. The **Distribution List** displays again with the newly added member in the list.



Abreon Training Schedule list - Distribution List
File
Edit
View
Insert
Tools
Actions
Help
Type a question for help
Save and Close
Members
Notes
Select Members...
Add New...
Remove
Update Now
Categories...

Name: Abreon Training Schedule list

Name	E-mail
Cathy McMahon	cathy.mcmahon@abreon.com
Judy Ward	judy.ward@abreon.com
Michele Medgaus	michele.medgaus@abreon.com
Tom Begg (tom.begg@abreon.com)	tom.begg@abreon.com

Private ☐

Deleting a Distribution List

When no longer needed, a distribution list can be deleted from Outlook Contacts. Distribution groups (as stored in the Global Address List) can only be deleted by an administrator.

Procedure:

1. Select the distribution list to be deleted.
2. Select the **Edit** menu and choose **Delete**.

   OR

   Right-click the list name and choose **Delete**.

   OR

   Press **[Ctrl]** + **[D]**.

   OR

   ✕ Click the **Delete** icon on the Outlook toolbar.
3. The distribution list will be removed from Outlook Contacts.

Tips:

- Use the **Undo** command to immediately restore a deleted list.
- When deleted, distribution lists, like e-mails, are placed in the **Deleted Items** folder until that folder is emptied. Deleted personal distribution lists can be recovered from the Deleted Items folder the same way that e-mails are recovered.

Chapter 3 – Working with Distribution Lists

Sending E-mail to a Distribution List or Group

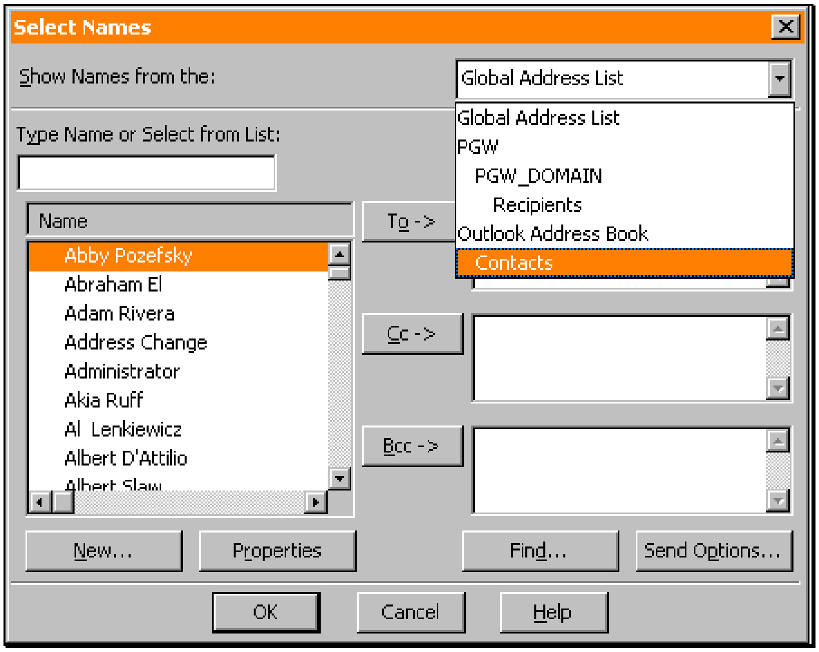
Distribution lists and groups can be used in addressing a message in the same manner as regular e-mail addresses. The convenience of a list allows the user to send to the same group over and over without having to select the individual members every time.

Procedure: (For distribution lists and groups)

1. Create a new e-mail message and click any of the address buttons (**To**, **Cc**, or **Bcc**).
2. To address the message using a distribution group, select the list name in the **Global Address List** (the default) and then click **To, Cc,** or **Bcc** as desired.

OR

To use a distribution list, select **Contacts** in the **Show Names from the** drop-down list. Select the list name and then click **To**, **Cc**, or **Bcc** as desired.


Select Names
Show Names from the:
Global Address List
Global Address List
PGW
PGW_DOMAIN
Recipients
Outlook Address Book
Contacts
Type Name or Select from List:
Name
Abby Pozefsky
Abraham El
Adam Rivera
Address Change
Administrator
Akia Ruff
Al Lenkiewicz
Albert D'Attilio
Albert Slaw
To ->
Cc ->
Bcc ->
New...
Properties
Find...
Send Options...
OK
Cancel
Help

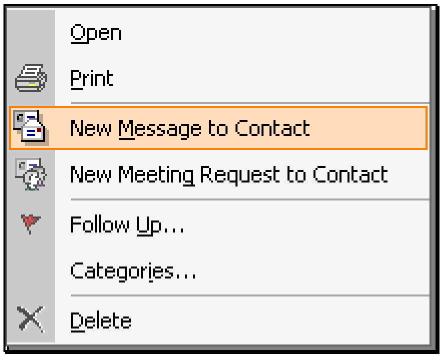
3. Click **OK** when finished. The distribution list(s) or groups(s) will appear in the selected address section of the e-mail.
4. Write and **Send** the message.

Procedure: (For distribution lists only)

1. In the Outlook Contacts folder, select the desired distribution list.
2. Select the **Actions** menu and choose **New Message to Contact**.

OR

Right-click the list name and choose **New Message to Contact**.


Open
Print
New Message to Contact
New Meeting Request to Contact
Follow Up...
Categories...
Delete

3. A message window displays with the distribution list name in the **To** section.
4. Write and **Send** the e-mail.

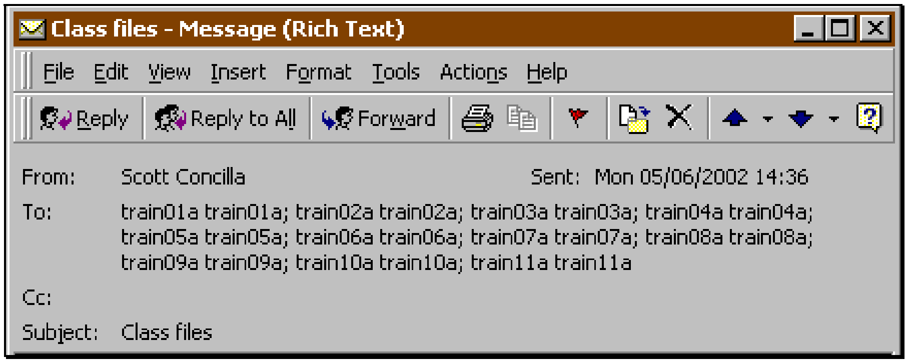
Warnings:

- When sending to multiple distribution lists and individual users, the total number of message recipients cannot exceed 100. If the total number exceeds 100, the e-mail will be returned to the user.
- The 100-receiver limit has been set by Information Services and cannot be changed by the sender.

Hiding Addresses When Using a Distribution List

As discussed at the beginning of this chapter, when sending e-mail to a distribution list, Outlook will expand the list to show every e-mail address contained on the list.

For example, in the picture below, although the e-mail was sent to a personal distribution list called "Training Room", all of the recipients of the message can see every e-mail address that was on the list.

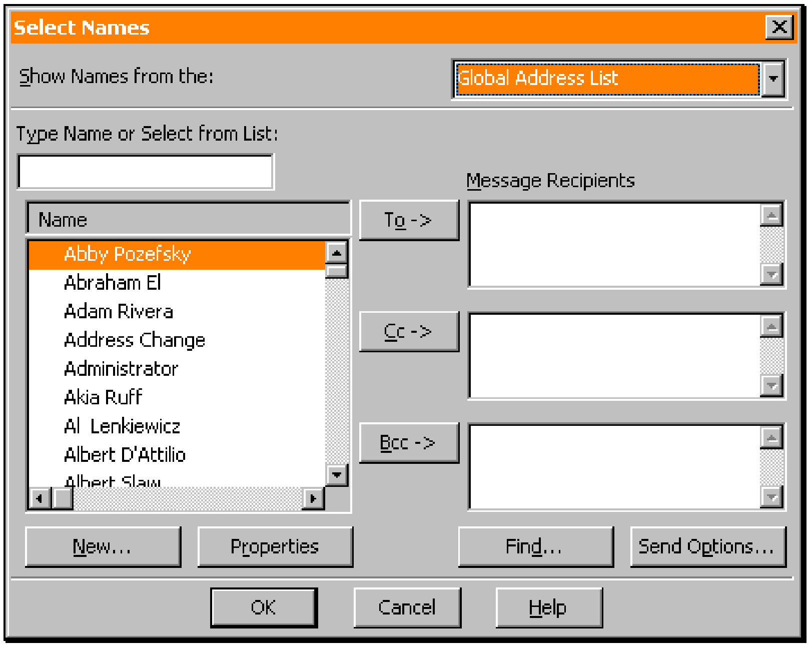


From: Scott Concilla
Sent: Mon 05/06/2002 14:36
To: train01a train01a; train02a train02a; train03a train03a; train04a train04a; train05a train05a; train06a train06a; train07a train07a; train08a train08a; train09a train09a; train10a train10a; train11a train11a
Cc:
Subject: Class files

Some times, due to the sheer number of people on a distribution list or for privacy reasons, it may be desirable to hide the members of a distribution list in an e-mail. This can be done by using the **Bcc** field of an e-mail.

Procedure:

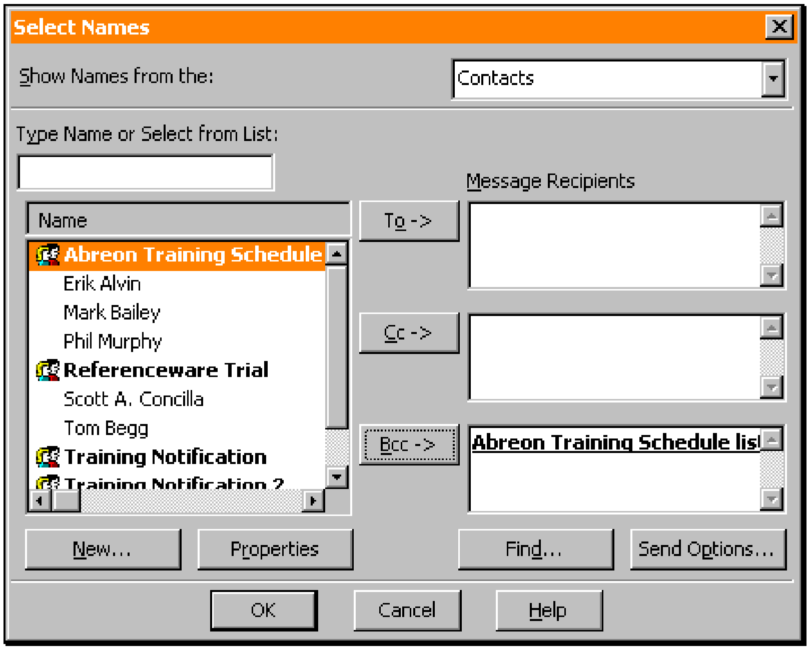
1. Create a new e-mail message.
2. Click the **To** button to address the e-mail. The **Select Names** dialog box displays:


Select Names
Type Name or Select from List:
Message Recipients
Name
Abby Pozefsky
Abraham El
Adam Rivera
Address Change
Administrator
Akia Ruff
Al Lenkiewicz
Albert D'Attilio
Albert Slaw
To ->
Cc ->
Bcc ->
New...
Properties
Find...
Send Options...
OK
Cancel
Help

Show Names from the: Global Address List

3. In the **Show Names from the** drop-down, select the Outlook Contacts folder.

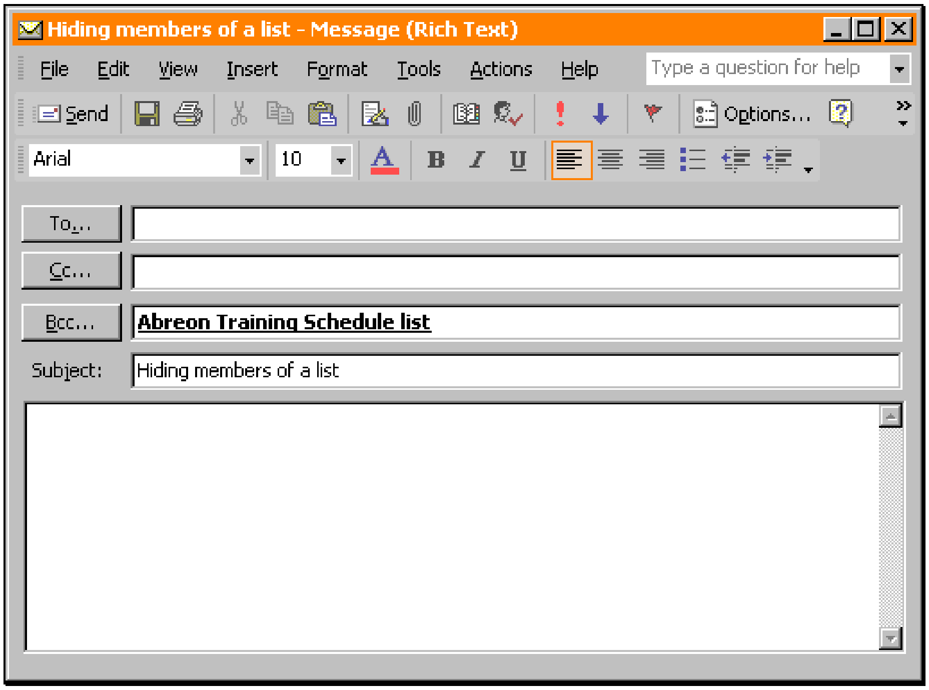
4. Select the desired distribution list and click **Bcc**. The address will appear in the **Bcc Message Recipients** box.


Select Names
Type Name or Select from List:
Message Recipients
Name
Abreon Training Schedule
Erik Alvin
Mark Bailey
Phil Murphy
Referenceware Trial
Scott A. Concilla
Tom Begg
Training Notification
Training Notification 2
To ->
Cc ->
Bcc ->
New...
Properties
Find...
Send Options...
OK
Cancel
Help

Show Names from the: Contacts

Bcc -> Abreon Training Schedule lis

5. Add any other addresses if needed and click **OK**. The message window displays again. The **Bcc** field is now visible with the selected list in the field:


Hiding members of a list - Message (Rich Text)
File Edit View Insert Format Tools Actions Help
Type a question for help
Send
Options...
Arial
10
To...
Cc...
Bcc...

Bcc: Abreon Training Schedule list

Subject: Hiding members of a list

6. Complete the message and **Send** it.

Chapter 4

Working with Folders

Chapter Objectives:

- Understanding Folder Types
- Creating Personal Folders
- Removing Personal Folders
- Restoring Personal Folders
- Determining Folder Size

Overview

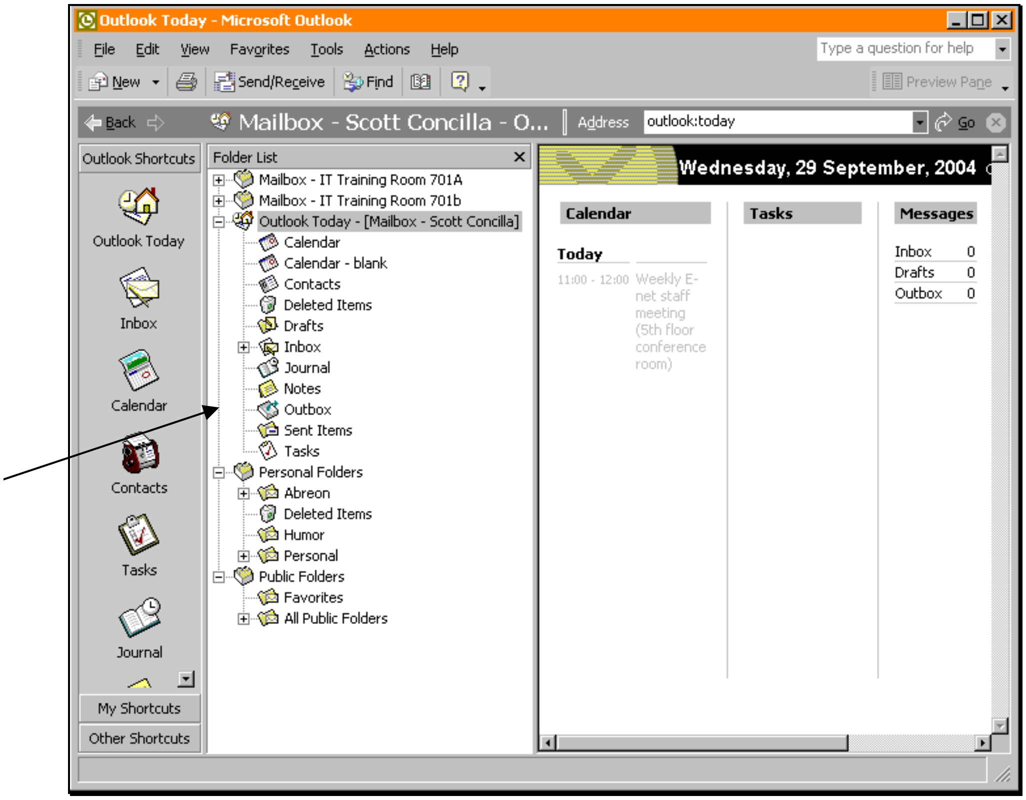
Like any system, Microsoft Outlook can become overloaded with messages, contact information, appointments, and other data. Outlook helps manage information by providing folders for storing data. Folders can be created, have data moved between them, and properties for folders can be set.

This chapter focuses on managing Outlook folders and their contents, and learning how to create new folders to store e-mail messages, contact information, and other files, both on the server and locally in Personal folders.

Understanding Folder Types

Outlook uses four main types of folders to organize information – Outlook folders, Personal folders, Public folders, and Archive folders.

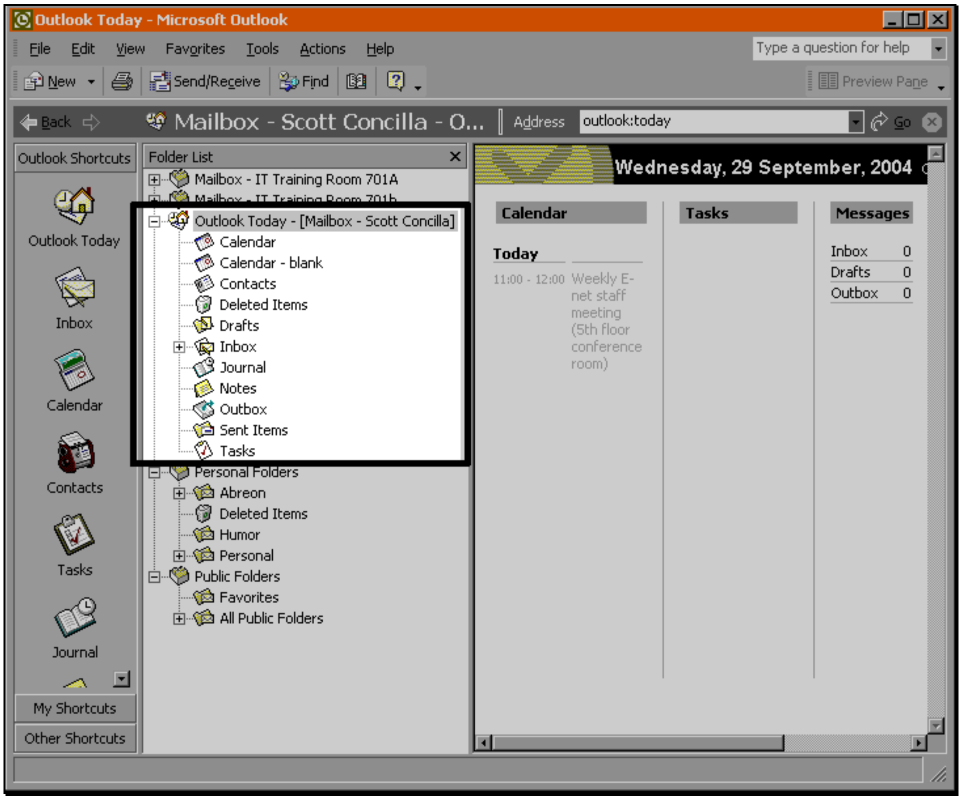
All folder types – those created by Outlook and those created by the user – appear in Outlook's folder list. If not currently visible, select the **View** menu, then **Folder List**.


Outlook Today - Microsoft Outlook
File
Edit
View
Favorites
Tools
Actions
Help
Type a question for help
New
Send/Receive
Find
Preview Page
Back
Mailbox - Scott Concilla - O...
Address
outlook:today
Go
Outlook Shortcuts
Outlook Today
Inbox
Calendar
Contacts
Tasks
Journal
My Shortcuts
Other Shortcuts
Folder List
Mailbox - IT Training Room 701A
Mailbox - IT Training Room 701b
Outlook Today - [Mailbox - Scott Concilla]
Calendar
Calendar - blank
Contacts
Deleted Items
Drafts
Inbox
Journal
Notes
Outbox
Sent Items
Tasks
Personal Folders
Abreon
Deleted Items
Humor
Personal
Public Folders
Favorites
All Public Folders
Wednesday, 29 September, 2004
Calendar
Tasks
Messages
Today
11:00 - 12:00 Weekly E-net staff meeting (5th floor conference room)
Inbox 0
Drafts 0
Outbox 0

Folder list

Outlook Folders

Outlook folders are stored on the Exchange (post office) server. Any additional folders created by the user within the Outlook Folders hierarchy are also stored on the server, and can be accessed from any workstation.


Outlook Today - Microsoft Outlook
File
Edit
View
Favorites
Tools
Actions
Help
Type a question for help
New
Send/Receive
Find
Preview Pane
Back
Mailbox - Scott Concilla - O...
Address
outlook:today
Go
Outlook Shortcuts
Outlook Today
Inbox
Calendar
Contacts
Tasks
Journal
My Shortcuts
Other Shortcuts
Folder List
Mailbox - IT Training Room 701A
Mailbox - IT Training Room 701b
Outlook Today - [Mailbox - Scott Concilla]
Calendar
Calendar - blank
Contacts
Deleted Items
Drafts
Inbox
Journal
Notes
Outbox
Sent Items
Tasks
Personal Folders
Abreon
Deleted Items
Humor
Personal
Public Folders
Favorites
All Public Folders
Wednesday, 29 September, 2004
Calendar
Tasks
Messages
Today
11:00 - 12:00 Weekly E-net staff meeting (5th floor conference room)
Inbox 0
Drafts 0
Outbox 0

Outlook with Outlook Folders highlighted

Outlook includes default folders for each type of item — for example, the Calendar, Contacts, Inbox, and Tasks folders. Along with these item-type folders are other default folders such as Deleted Items, Drafts, and Outbox. The default Outlook folders cannot be deleted or renamed.

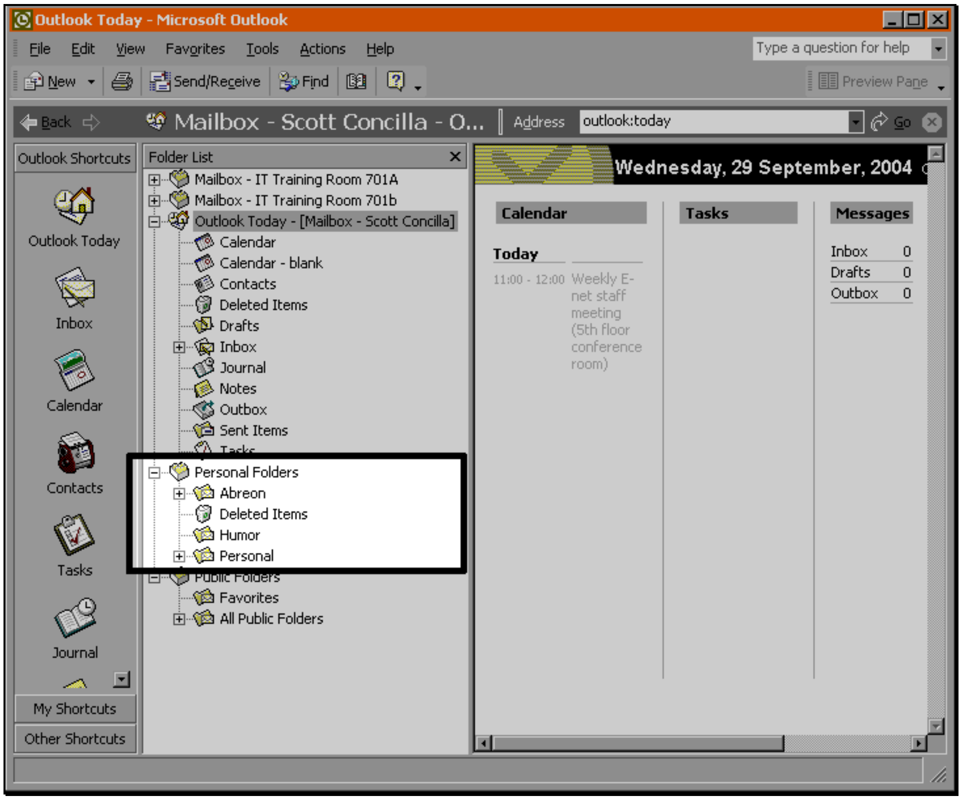
Items and files stored in Outlook folders, both the default folders created by Outlook and other folders created by the user, count against the space allocated to an account granted by the Exchange administrator.

Personal Folders

Personal folders are created by the user, and are stored either on a workstation or network drive. Multiple sets of personal folders can be created.

Personal folders look just like Outlook folders, except that they do not reside on the Exchange server. Instead, they are written as a single file, similar to a Word document. The personal folders file ends with a PST extension.

Personal folders do not count against a user's available Outlook storage, however, they do use space on the local hard drive or network drive where they are stored.


Outlook Today - Microsoft Outlook
File
Edit
View
Favorites
Tools
Actions
Help
Type a question for help
New
Send/Receive
Find
Preview Pane
Back
Mailbox - Scott Concilla - O...
Address
outlook:today
Go
Outlook Shortcuts
Outlook Today
Inbox
Calendar
Contacts
Tasks
Journal
My Shortcuts
Other Shortcuts
Folder List
Mailbox - IT Training Room 701A
Mailbox - IT Training Room 701b
Outlook Today - [Mailbox - Scott Concilla]
Calendar
Calendar - blank
Contacts
Deleted Items
Drafts
Inbox
Journal
Notes
Outbox
Sent Items
Tasks
Personal Folders
Abreon
Deleted Items
Humor
Personal
Public Folders
Favorites
All Public Folders
Wednesday, 29 September, 2004
Calendar
Tasks
Messages
Today

11:00 - 12:00 Weekly E-net staff meeting (5th floor conference room)

Inbox	0
Drafts	0
Outbox	0

Outlook with Personal Folders highlighted

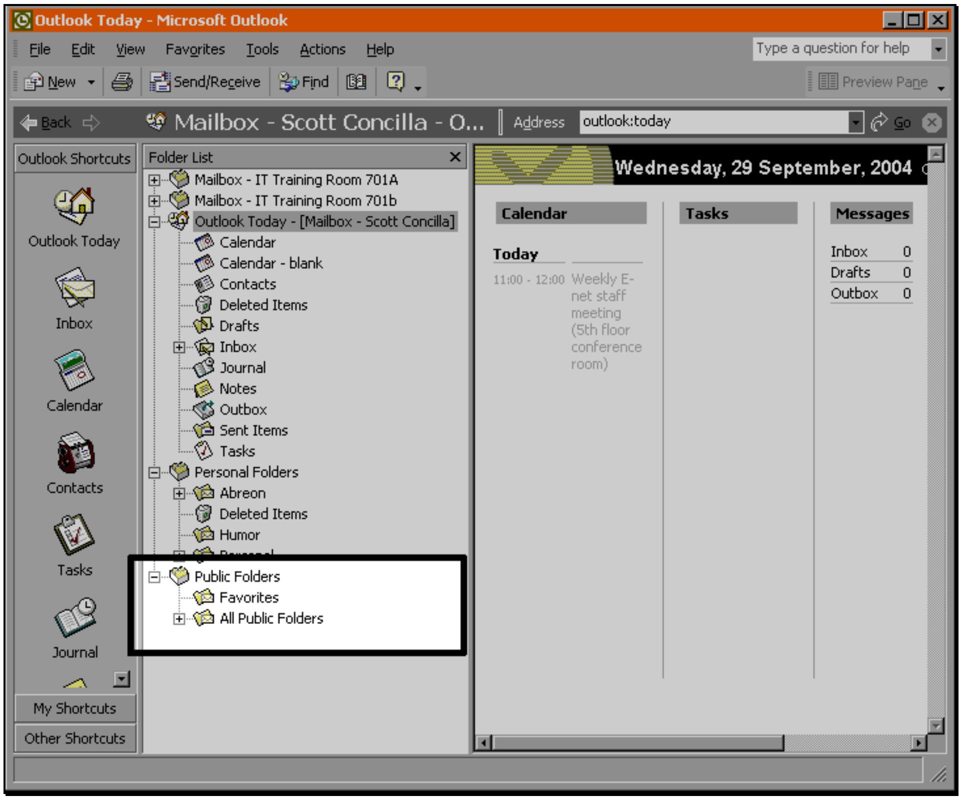
Also, if the PST file is stored on a local workstation, the Personal folders will not be available when logging in at a different workstation. At PGW, Personal folders should almost always be stored on the H: drive.

Public Folders

Public folders reside on the Exchange server, where other users can access them. The primary function of public folders is to allow users to share messages, contacts, documents, and other items.

When viewing the folder list in Outlook, two subfolders are listed under the Public Folders branch – Favorites and All Public Folders. The Favorites folder gives quick access to public folders that are used often.

The All Public Folders branch shows the folders available on the server. All Public Folders includes folders created by other users or the Exchange server administrator. Rights and properties are assigned to Public folders to control who can post and read items.


Outlook Today - Microsoft Outlook
File
Edit
View
Favorites
Tools
Actions
Help
Type a question for help
New
Send/Receive
Find
Preview Pane
Back
Mailbox - Scott Concilla - O...
Address
outlook:today
Go
Outlook Shortcuts
Outlook Today
Inbox
Calendar
Contacts
Tasks
Journal
My Shortcuts
Other Shortcuts
Folder List
Mailbox - IT Training Room 701A
Mailbox - IT Training Room 701b
Outlook Today - [Mailbox - Scott Concilla]
Calendar
Calendar - blank
Contacts
Deleted Items
Drafts
Inbox
Journal
Notes
Outbox
Sent Items
Tasks
Personal Folders
Abreon
Deleted Items
Humor
Public Folders
Favorites
All Public Folders
Wednesday, 29 September, 2004
Calendar
Tasks
Messages
Today
11:00 - 12:00 Weekly E-net staff meeting (5th floor conference room)
Inbox 0
Drafts 0
Outbox 0

Outlook with Public Folders highlighted

Archive Folders

Archive folders are similar to personal folders. Archive folders are generally stored on a workstation or network drive, and are also stored as a PST file, usually with the name **archive.pst**.

Since they do not reside on the Exchange server, archive folders do not count against the space allocated to an Outlook account.

Items can be moved or copied to archive folders manually, or the process can be automated by way of the AutoArchive function.

Creating Personal Folders

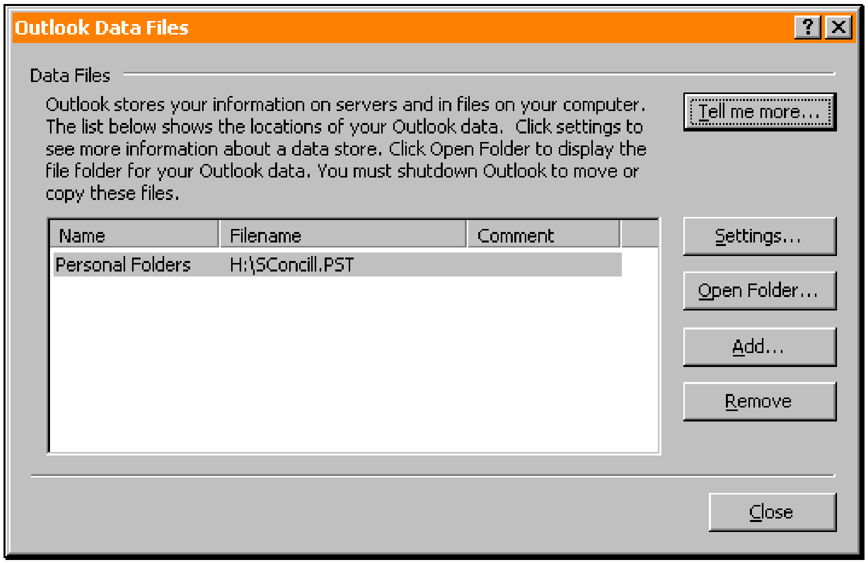
Personal folders are similar to Outlook folders in almost every respect except one – they are stored as separate PST files outside of the Exchange server. Folders and subfolders can be created within personal folders, just like Outlook folders.

Multiple instances of personal folders can also be added to Outlook. For instance, one set of personal folders could be used for storing old Outlook items, while another set could be installed and used for items that have attachments.

Use the following procedure to add personal folders to Outlook.

Procedure:

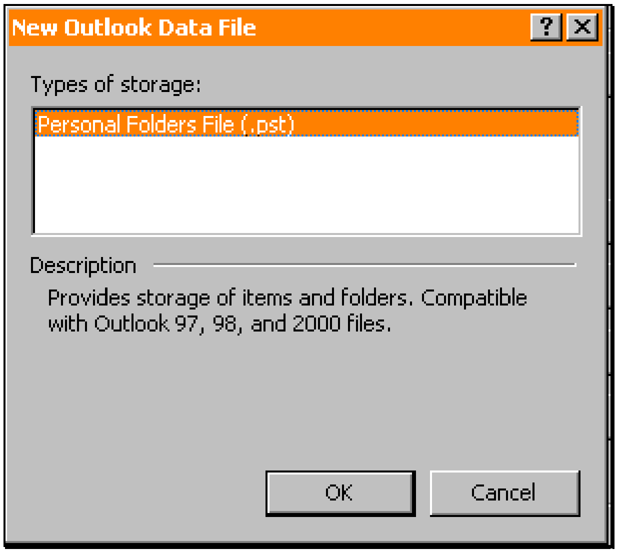
1. Select the **File** menu and choose **Data File Management**. The **Outlook Data Files** dialog box displays:



Outlook stores your information on servers and in files on your computer. The list below shows the locations of your Outlook data. Click settings to see more information about a data store. Click Open Folder to display the file folder for your Outlook data. You must shutdown Outlook to move or copy these files.

Name	Filename	Comment
Personal Folders	H:\SConcill.PST	

2. Click **Add**. The **New Data File** dialog box displays:



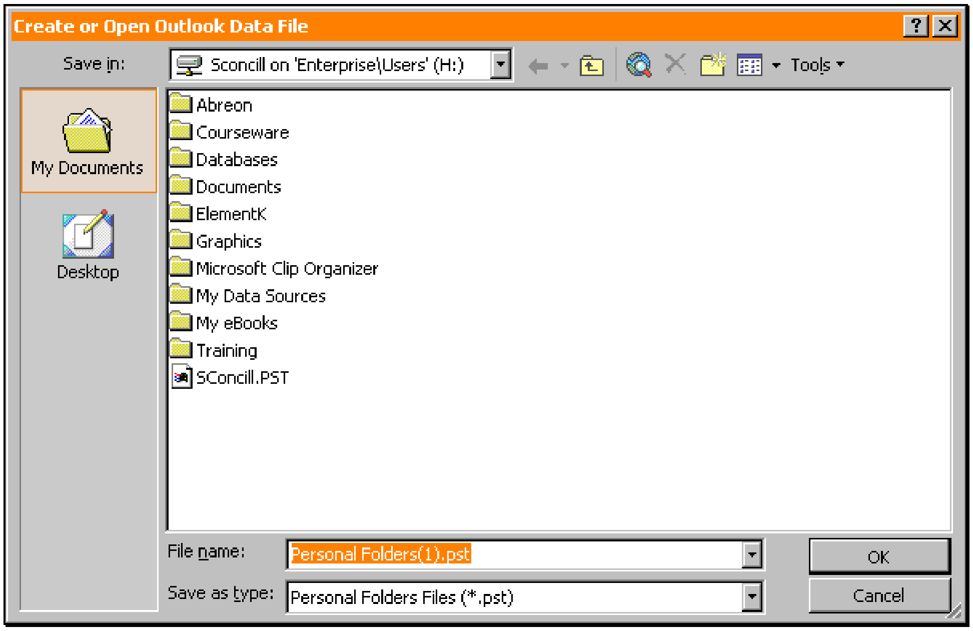
Types of storage:

Personal Folders File (.pst)

Description

Provides storage of items and folders. Compatible with Outlook 97, 98, and 2000 files.

3. In the **Types of Storage** list, select **Personal Folders File** and click **OK**. The **Create or Open Outlook Data File** window displays:



Save in: Sconcill on 'Enterprise\Users' (H:)

Abreon
Courseware
Databases
Documents
ElementK
Graphics
Microsoft Clip Organizer
My Data Sources
My eBooks
Training
SConcill.PST

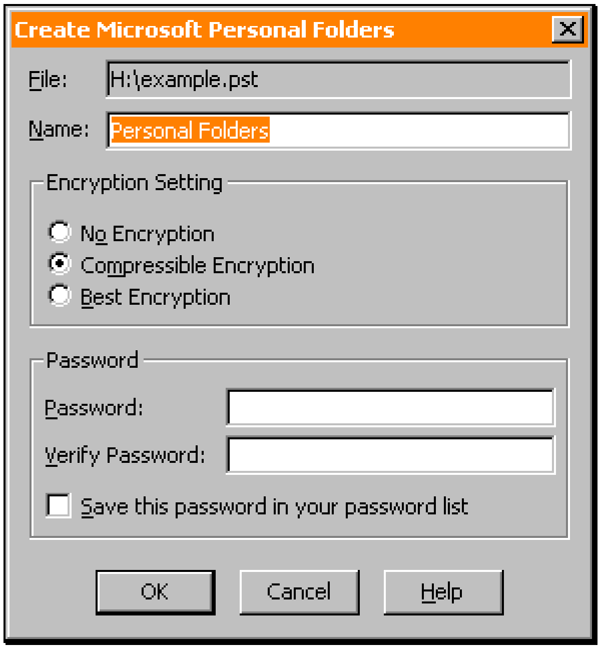
File name: Personal Folders(1).pst

Save as type: Personal Folders Files (*.pst)

4. Using the **Save In** drop-down, navigate to the H: drive. **DO NOT SAVE PST FILES TO THE C: DRIVE OR ANY PGW WORKSTATION**. Laptops may be an exception to this rule, and should be discussed with Information Services.

5. In the **File name** box, type a name for the PST file. It is highly recommended that the network login username be used as the name of the file. Outlook will automatically add the PST extension to the file.

6. Click **OK**. The **Create Microsoft Personal Folders** dialog box displays:



Create Microsoft Personal Folders

File: H:\example.pst

Name: Personal Folders

Encryption Setting

○ No Encryption

● Compressible Encryption

○ Best Encryption

Password

Password:

Verify Password:

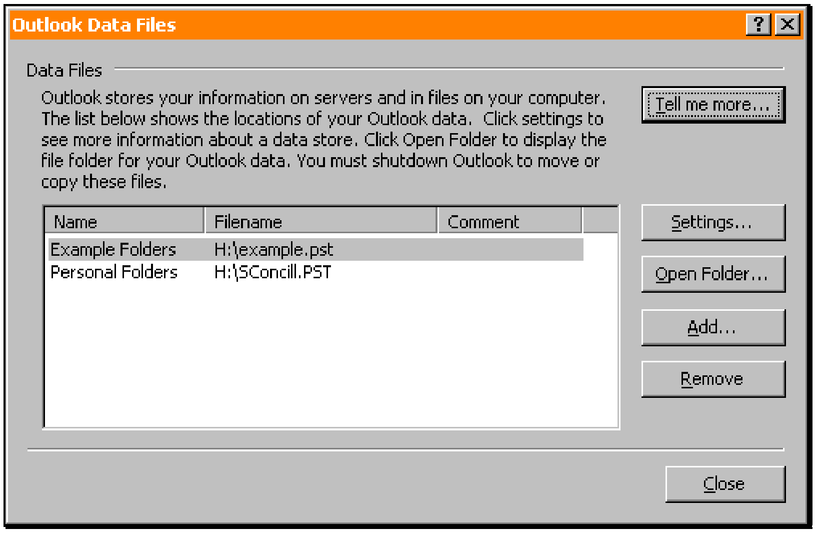
☐ Save this password in your password list

7. If desired, type a display name for the personal folders in the **Name** box. This is the name that will appear in Outlook's folder list. The default is **Personal Folders**.

8. Select an **Encryption Setting**. The default is **Compressible Encryption**.

9. If security is desired, add a **Password** to the file. If a password is added, each time Outlook starts it will prompt for the password to open the personal folders file. If the password is not supplied, the personal folders will not appear in the folder list.

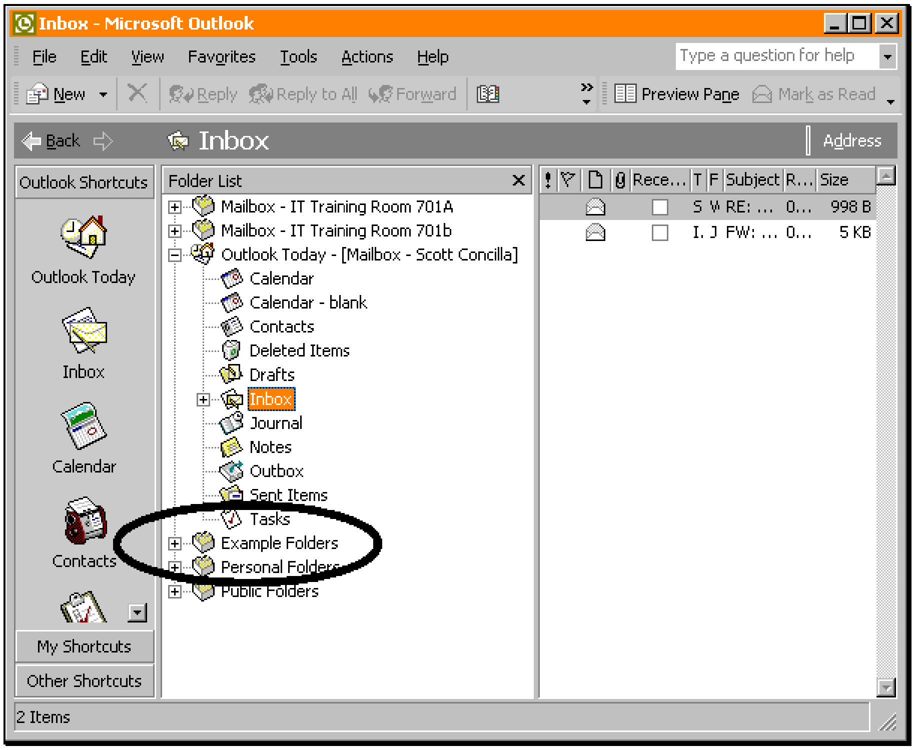
10. Click **OK**. Outlook displays the **Outlook Data Files** dialog box:


Outlook Data Files
?
Data Files
Tell me more...
Settings...
Open Folder...
Add...
Remove
Close

Outlook stores your information on servers and in files on your computer. The list below shows the locations of your Outlook data. Click settings to see more information about a data store. Click Open Folder to display the file folder for your Outlook data. You must shutdown Outlook to move or copy these files.

Name	Filename	Comment
Example Folders	H:\example.pst	
Personal Folders	H:\SConcill.PST	

11. Click **Close** to return to Outlook. The new personal folders now appear in the folder list:


Inbox - Microsoft Outlook
File
Edit
View
Favorites
Tools
Actions
Help
Type a question for help
New
Reply
Reply to All
Forward
Preview Pane
Mark as Read
Back
Inbox
Address
Outlook Shortcuts
Outlook Today
Inbox
Calendar
Contacts
My Shortcuts
Other Shortcuts
Folder List
Mailbox - IT Training Room 701A
Mailbox - IT Training Room 701b
Outlook Today - [Mailbox - Scott Concilla]
Calendar
Calendar - blank
Contacts
Deleted Items
Drafts
Inbox
Journal
Notes
Outbox
Sent Items
Tasks
Example Folders
Personal Folders
Public Folders
Rece...
T
F
Subject
R...
Size
S W RE: ... 0... 998 B
I. J FW: ... 0... 5 KB
2 Items

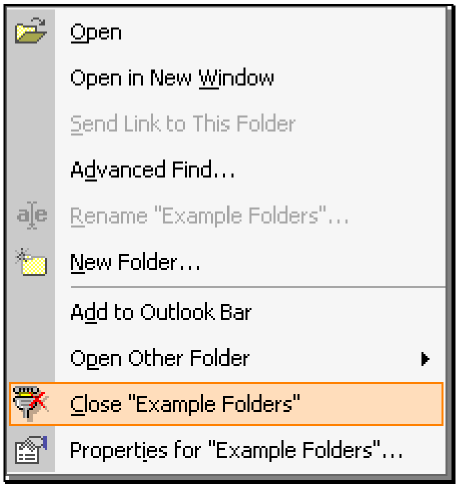
Removing Personal Folders

Removing personal folders disconnects Outlook's data connection to the personal folders – it does not delete the folders. When removed, the chosen set of personal folders will no longer appear in the folder list. The folders can be restored at any time.

This procedure can be especially useful when working offline or remotely, or when trying to troubleshoot a problem with Outlook.

Procedure:

1. *Right*-click on the personal folders to be removed and select **Close "<foldername>"**.

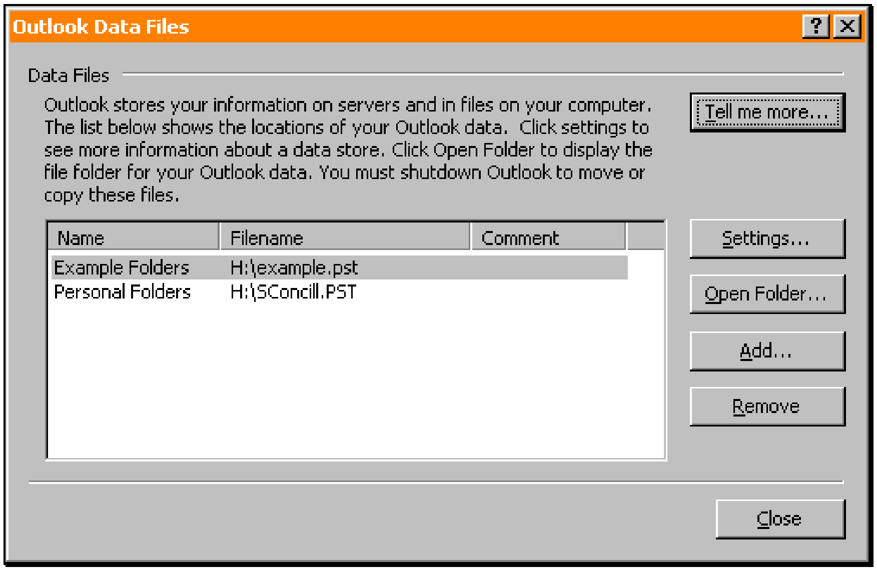


Open
Open in New Window
Send Link to This Folder
Advanced Find...
Rename "Example Folders"...
New Folder...
Add to Outlook Bar
Open Other Folder
Close "Example Folders"
Properties for "Example Folders"...

2. The folders will be removed from the folder list.

Procedure:

1. Select the **File** menu and choose **Data File Management**. The **Outlook Data Files** dialog box displays:

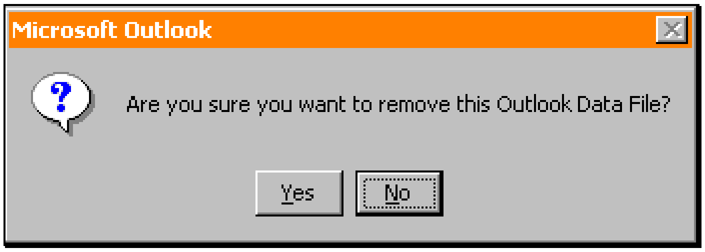


Outlook stores your information on servers and in files on your computer. The list below shows the locations of your Outlook data. Click settings to see more information about a data store. Click Open Folder to display the file folder for your Outlook data. You must shutdown Outlook to move or copy these files.

Name	Filename	Comment
Example Folders	H:\example.pst	
Personal Folders	H:\SConcill.PST	

2. In the **Data Files** list, select the set of personal folders to be removed.

3. Click **Remove**. Outlook will prompt for confirmation:



Are you sure you want to remove this Outlook Data File?

4. Click **Yes** to remove the personal folders from the folder list, or **No** to cancel.

5. Click **Close** to return to Outlook. The personal folders that were removed are no longer in the folder list.

Tips:

- Removing a set of personal folders from the Outlook folder list does not delete or harm the actual PST file. It simply makes the set of folders no longer visible to Outlook.
- To delete a PST file, it must first be removed from the folder list using the above procedure. The PST file can then be deleted using Windows Explorer, My Computer or any similar method for deleting a file.

Restoring Personal Folders

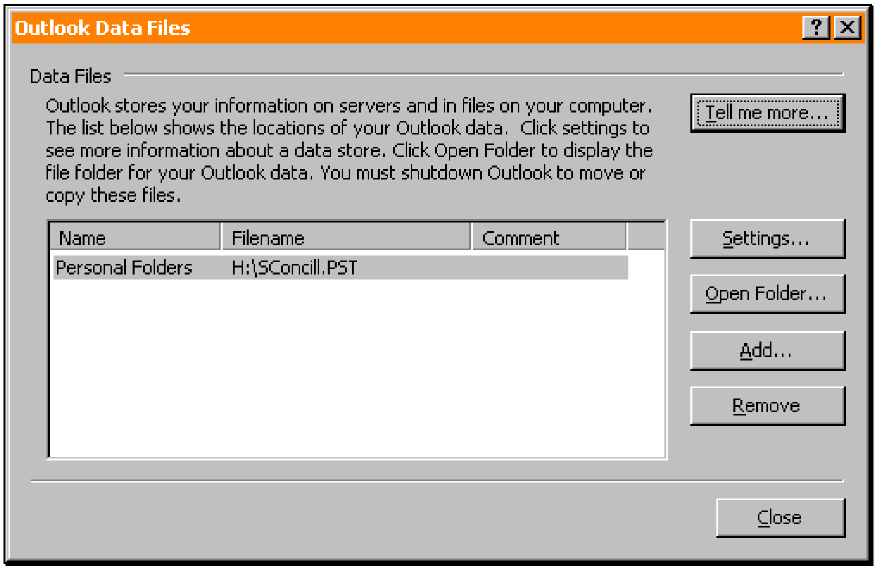
Personal folders that have already been created can be added back into the Outlook folder list with a procedure similar to creating new folders.

This procedure can be used to restore personal folders that seem to have disappeared from the folder list, or when Outlook gives an error when starting that it is unable to locate a set of personal folders.

This procedure can also be used when a PST file is copied from one location to another, for instance, when a PST file is copied from a network hard drive and installed on a home workstation or laptop.

Procedure:

1. Select the **File** menu and choose **Data File Management**. The **Outlook Data Files** dialog box displays:



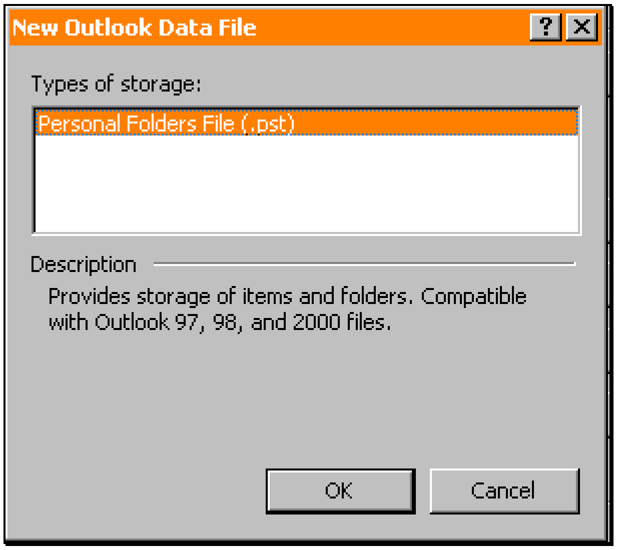
Outlook Data Files

Data Files

Outlook stores your information on servers and in files on your computer. The list below shows the locations of your Outlook data. Click settings to see more information about a data store. Click Open Folder to display the file folder for your Outlook data. You must shutdown Outlook to move or copy these files.

Name	Filename	Comment
Personal Folders	H:\SConcill.PST	

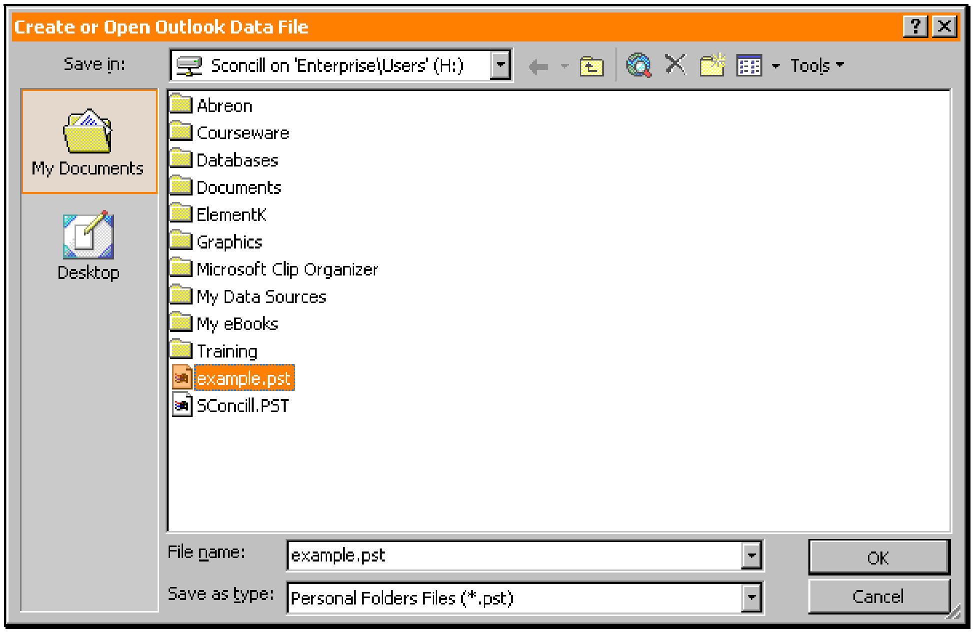
2. Click **Add**. The **New Data File** dialog box displays:


New Outlook Data File
?
OK
Cancel

Types of storage:
Personal Folders File (.pst)

Description
Provides storage of items and folders. Compatible with Outlook 97, 98, and 2000 files.

3. In the **Types of Storage** list, select **Personal Folders File** and click **OK**. The **Create or Open Outlook Data File** window displays:

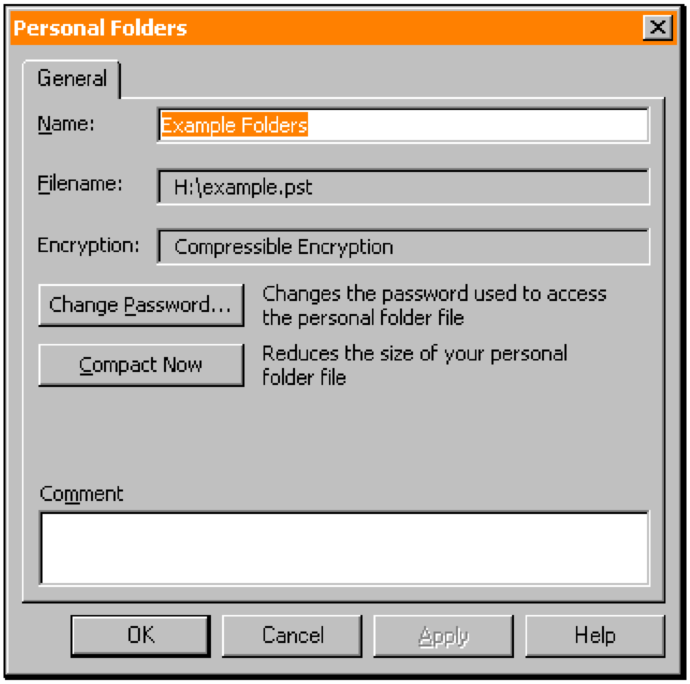

Create or Open Outlook Data File
?
Tools
My Documents
Desktop
OK
Cancel

Save in: Sconcill on 'Enterprise\Users' (H:)

Abreon
Courseware
Databases
Documents
ElementK
Graphics
Microsoft Clip Organizer
My Data Sources
My eBooks
Training
example.pst
SConcill.PST

File name: example.pst
Save as type: Personal Folders Files (*.pst)

4. Locate and select the PST file and click **OK**. The **Personal Folders** dialog box displays:


Personal Folders
General
Change Password...
Compact Now
OK
Cancel
Apply
Help

Name: Example Folders

Filename: H:\example.pst

Encryption: Compressible Encryption

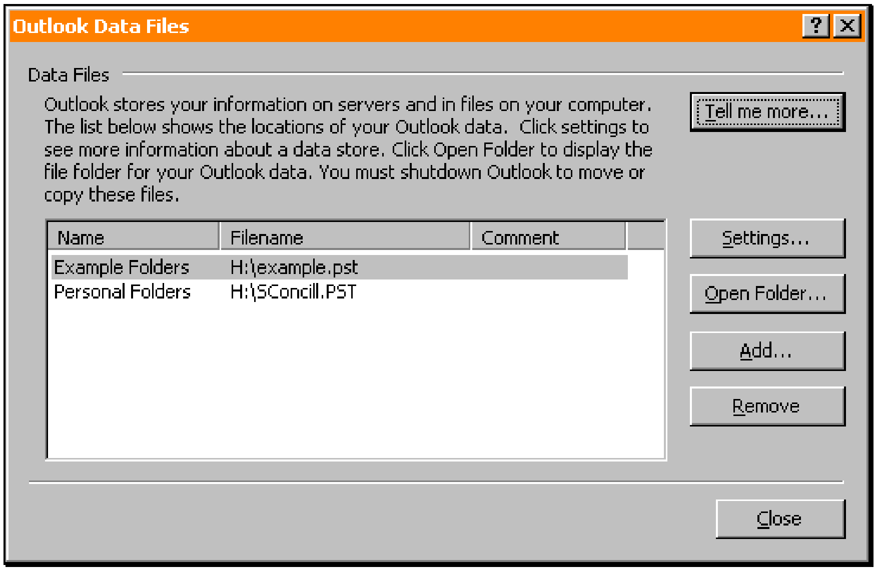
Changes the password used to access the personal folder file

Reduces the size of your personal folder file

Comment

5. If desired, type a new display name for the folders in the **Name** box. Options are also available to **Change Password** and **Compact Now**.

6. Click **OK** when completed. The **Outlook Data Files** dialog box displays:


Outlook Data Files
Data Files
Tell me more...
Settings...
Open Folder...
Add...
Remove
Close

Outlook stores your information on servers and in files on your computer. The list below shows the locations of your Outlook data. Click settings to see more information about a data store. Click Open Folder to display the file folder for your Outlook data. You must shutdown Outlook to move or copy these files.

Name	Filename	Comment
Example Folders	H:\example.pst	
Personal Folders	H:\SConcill.PST	

7. Click **Close** to return to Outlook.

8. The selected set of personal folders now appears in the Outlook folder list.

Chapter 4 – Working with Folders

Determining Folder Size

While it is easy to find the size of individual items within Outlook by using the **Size** column in the message list, it is not as obvious how to determine the size of all items together in a folder, or the size of a folder plus the subfolders underneath it.

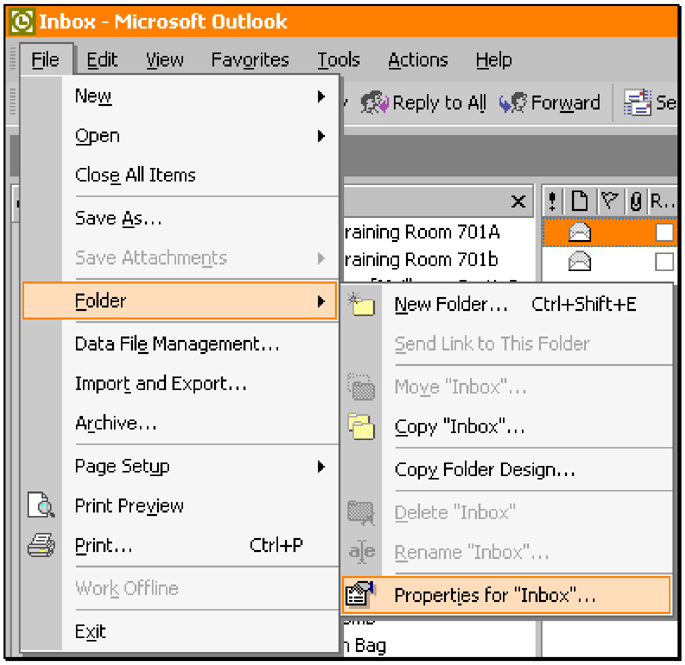
Knowing the size of all items in a folder or group of subfolders can be helpful in determining where items may need to be archived or deleted.

Use the following procedure to determine folder size in Outlook.

Procedure:

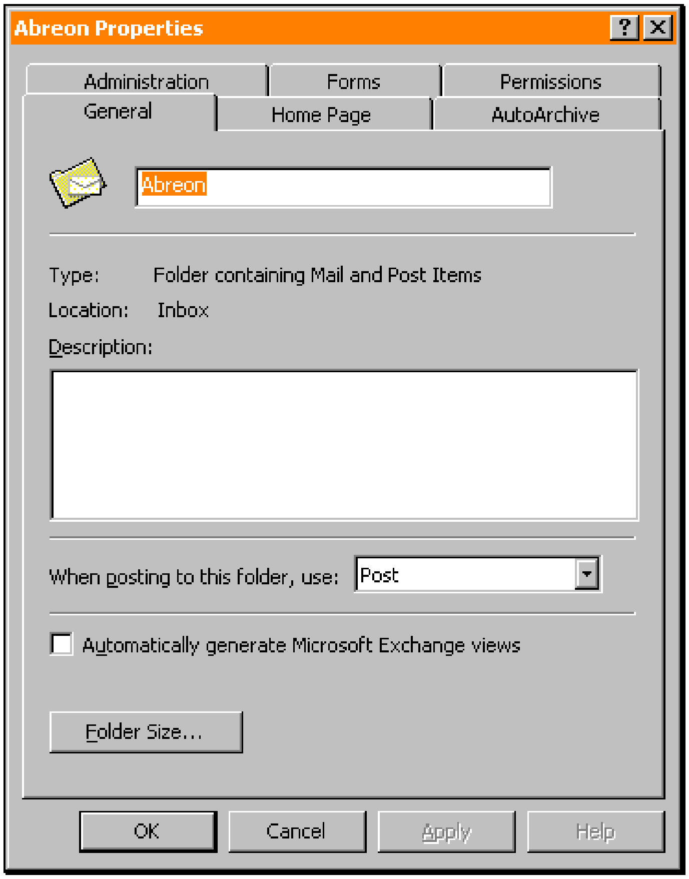
1. Select a folder from the Outlook folder list.

2. Select the **File** menu and choose **Folder**, then **Properties for "<foldername>"**.


Inbox - Microsoft Outlook
File
Edit
View
Favorites
Tools
Actions
Help
New
Open
Close All Items
Save As...
Save Attachments
Folder
Data File Management...
Import and Export...
Archive...
Page Setup
Print Preview
Print... Ctrl+P
Work Offline
Exit
Reply to All
Forward
Se
raining Room 701A
raining Room 701b
R...
New Folder... Ctrl+Shift+E
Send Link to This Folder
Move "Inbox"...
Copy "Inbox"...
Copy Folder Design...
Delete "Inbox"
Rename "Inbox"...
Properties for "Inbox"...
n Bag

OR

Right-click on the folder name and choose **Properties**. The folder's **Properties** dialog box displays:


Abreon Properties
Administration
Forms
Permissions
General
Home Page
AutoArchive
OK
Cancel
Apply
Help
Folder Size...

Abreon

Type: Folder containing Mail and Post Items

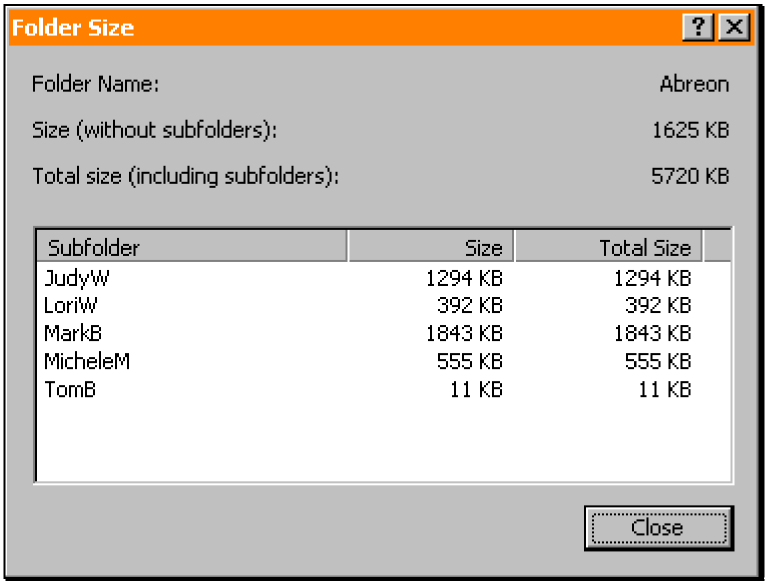
Location: Inbox

Description:

When posting to this folder, use: Post

☐ Automatically generate Microsoft Exchange views

3. Click **Folder Size**. The **Folder Size** dialog box displays:


Folder Size
Close

Folder Name: Abreon

Size (without subfolders): 1625 KB

Total size (including subfolders): 5720 KB

Subfolder	Size	Total Size
JudyW	1294 KB	1294 KB
LoriW	392 KB	392 KB
MarkB	1843 KB	1843 KB
MicheleM	555 KB	555 KB
TomB	11 KB	11 KB

4. Review the information as needed. When finished, click **Close**.

5. Click **OK** to close the **Properties** dialog box and return to Outlook.

Chapter 5

Using AutoArchive

Chapter Objectives:

- Setting Folder AutoArchive Properties
- Setting AutoArchive Default Properties
- Running AutoArchive Manually
- Marking Items to not be AutoArchived

Chapter 5 – Using AutoArchive

Overview

Archiving data is similar to storing old clothes or toys in a house attic. The data is taken out of folders and moved to another place for safekeeping. The data might need to be accessed at a later time, but right now it is just getting in the way.

The Outlook AutoArchive feature archives data automatically or manually according to settings configured for each folder individually or for all folders together.

Archive folders are very similar to personal folders. The data within them is written to a PST file, and is stored on the workstation or network drive. Archive folders usually have a filename of **archive.pst** and can be added or removed from the Outlook folder list in the same manner as personal folders.

Setting Folder AutoArchive Properties

The first step in using AutoArchive is to set the AutoArchive properties for a folder or group of folders. These properties determine whether AutoArchive will run on a folder or not, and what actions should take place during the AutoArchive process.

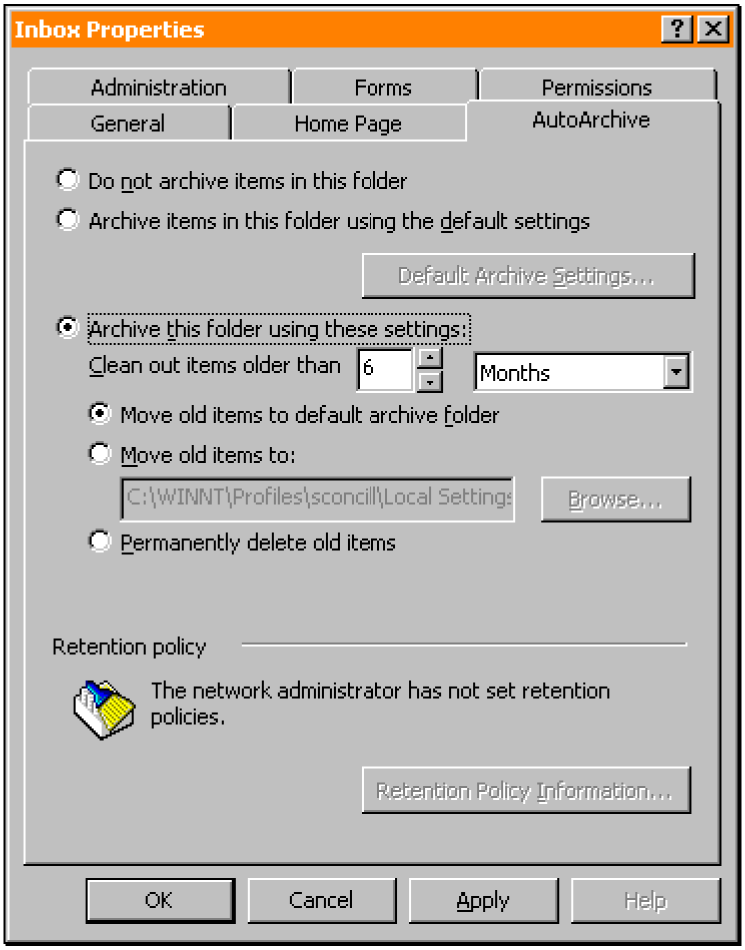
Once the properties are set for a folder, AutoArchive will run automatically based on the settings chosen.

Procedure:

1. Select a folder from the folder list.
2. Select the **File** menu and choose **Folder**, then **Properties for "<foldername>"**.

   OR

   Right-click on the folder and select **Properties for "<foldername>"**. The **Properties** dialog box displays.
3. Select the **AutoArchive** tab.


Inbox Properties
?
✕
Administration
Forms
Permissions
General
Home Page
AutoArchive
Default Archive Settings...
Browse...
Retention Policy Information...
OK
Cancel
Apply
Help

○ Do not archive items in this folder

○ Archive items in this folder using the default settings

● Archive this folder using these settings:

Clean out items older than 6 Months

● Move old items to default archive folder

○ Move old items to:

C:\WINNT\Profiles\sconcill\Local Settings

○ Permanently delete old items

Retention policy

The network administrator has not set retention policies.

4. Select one of the three following options:

Option	Description
Do not archive items in this folder	AutoArchive will not archive any items in the folder. (default)
Archive items in this folder using the default settings	AutoArchive will archive items in this folder according to the default settings as defined by Outlook, or as selected by the user. (See next section for changing these settings.)
Archive this folder using these settings	AutoArchive will archive items in this folder according to the settings in this dialog box and will ignore/override the default settings.

© 0A316

5. If the **Archive this folder** option was selected, continue with this procedure, otherwise, click **OK** to return to Outlook.

6. Use the spinner control and period drop-down of the **Clean out items older than** option to set the age of items that should be archived.

7. Select one of the three following options for how Outlook should handle archived items:

Option	Description
Move old items to default archive folder	Archived items will be moved to an archive folder, and the PST file will be stored in the default Outlook location. **(Not recommended for PGW users.)**
Move old items to	Archived items will be moved to an archive folder, and the PST file will be named and stored in a location as determined by the user. **(This is the recommended option for PGW. The archive.pst file should be stored on the H: or S: drive, NOT the C: drive.)**
Permanently delete old items	Items that are past the aging date will be permanently deleted by Outlook. Items will NOT be placed in the Deleted Items folder. **(Not recommended.)**

8. Click **OK** to set the properties for the folder and return to Outlook.

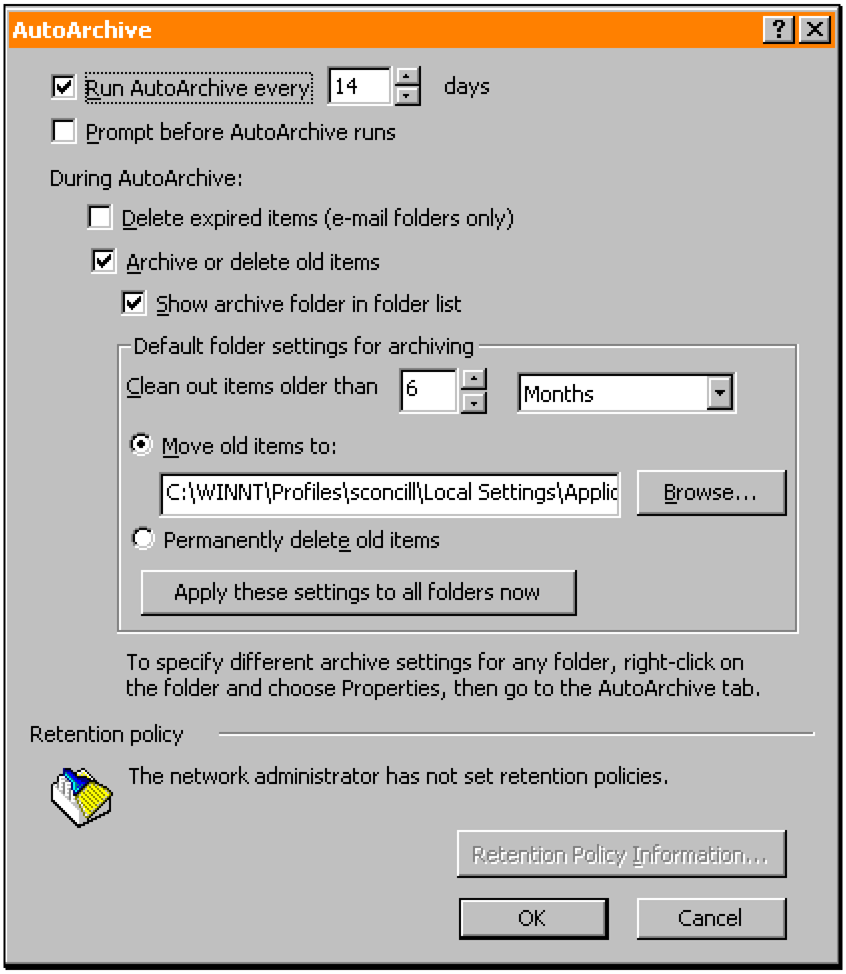
Setting AutoArchive Default Properties

Outlook provides a group of default settings for AutoArchive, however, this can be changed to suit the user's preferences. Additionally, by changing the default settings, the AutoArchive properties for all folders within Outlook can be set at the same time.

Default settings for AutoArchive will always be overridden by preferences set on individual folders.

Procedure:

1. Select the **Tools** menu and choose **Options**.
2. In the **Options** dialog box, select the **Other** tab.
3. Click **AutoArchive**. The **AutoArchive** dialog box displays:



☑ Run AutoArchive every 14 days

☐ Prompt before AutoArchive runs

During AutoArchive:

☐ Delete expired items (e-mail folders only)

☑ Archive or delete old items

☑ Show archive folder in folder list

Default folder settings for archiving

Clean out items older than 6 Months

● Move old items to:

C:\WINNT\Profiles\sconcill\Local Settings\Applic

○ Permanently delete old items

To specify different archive settings for any folder, right-click on the folder and choose Properties, then go to the AutoArchive tab.

Retention policy

The network administrator has not set retention policies.

4. Use the following table to set the desired options for AutoArchive:

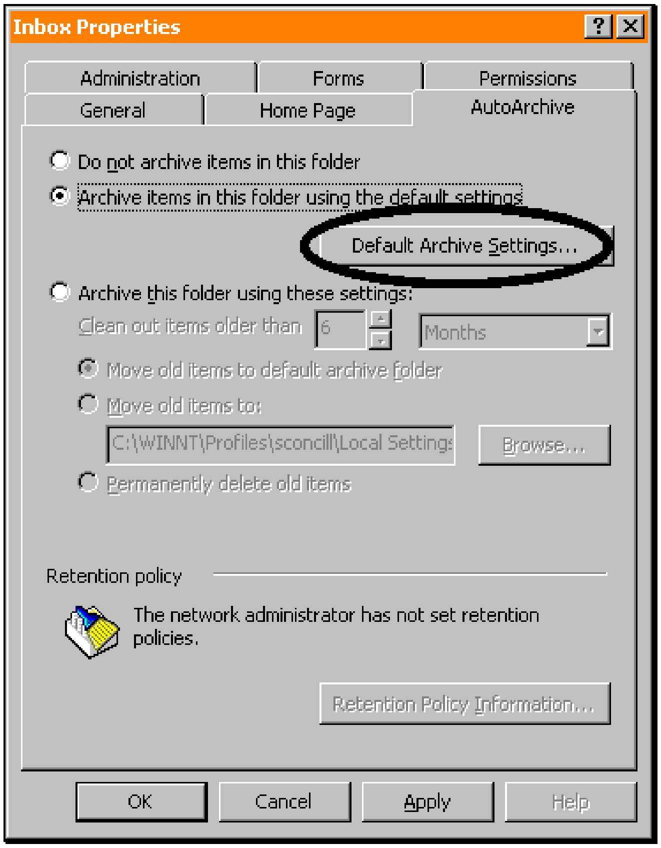
Option	Description
Run AutoArchive every *n* days	Select the number of days between the times that AutoArchive runs. Accepts a number between 1 (daily) and 60 (about every two months).
Prompt before AutoArchive runs	Select this check box to have Outlook display a prompt before running AutoArchive. The prompt includes a **Cancel** button to cancel AutoArchive for that day.
Delete expired items	Select this option to have Outlook move expired items directly to the **Deleted Items** folder without archiving. Applies to e-mail folders only.
Archive or delete old items	Select this check box to enable the options below it. Options can be selected for archiving or deleting.
Show Archive Folder in Folder List	Select this option to have Outlook display the archive folder in the folder list. If left unchecked, the **archive.pst** file will be created, however, it will not appear in the folder list.
Clean out items older than	Use the spinner control and drop-down menu to select the aging period for expired items.
Move old items to	Archived items will be moved to an archive folder, and the PST file will be named and stored in a location as determined by the user. Click **Browse** to change the default location for the PST file. **(The recommended option for PGW is to pick a different location. The archive.pst file should be stored on the H: or S: drive, NOT the C: drive.)**
Permanently delete old items	Expired items will be permanently deleted from Outlook. No archive folder file will be created.
Apply these settings to all folders now	Click this button to have Outlook apply these AutoArchive settings to all folders.

5. When all options have been selected as desired, click **OK** to close the **AutoArchive** dialog box.

6. Click **OK** again to close the **Options** dialog box and return to Outlook.

Tips:

- The default AutoArchive settings can also be accessed via any folder by clicking the **Default Archive Settings** button on the **AutoArchive** tab of the folder's properties.


Inbox Properties
Administration
Forms
Permissions
General
Home Page
AutoArchive
Default Archive Settings...
Browse...
Retention Policy Information...
OK
Cancel
Apply
Help

○ Do not archive items in this folder
● Archive items in this folder using the default settings
○ Archive this folder using these settings:
Clean out items older than 6 Months
● Move old items to default archive folder
○ Move old items to:
C:\WINNT\Profiles\sconcill\Local Setting:
○ Permanently delete old items

Retention policy

The network administrator has not set retention policies.

Warning:

- Default settings will be overridden by any AutoArchive settings that have been set up on individual folders.

Running AutoArchive Manually

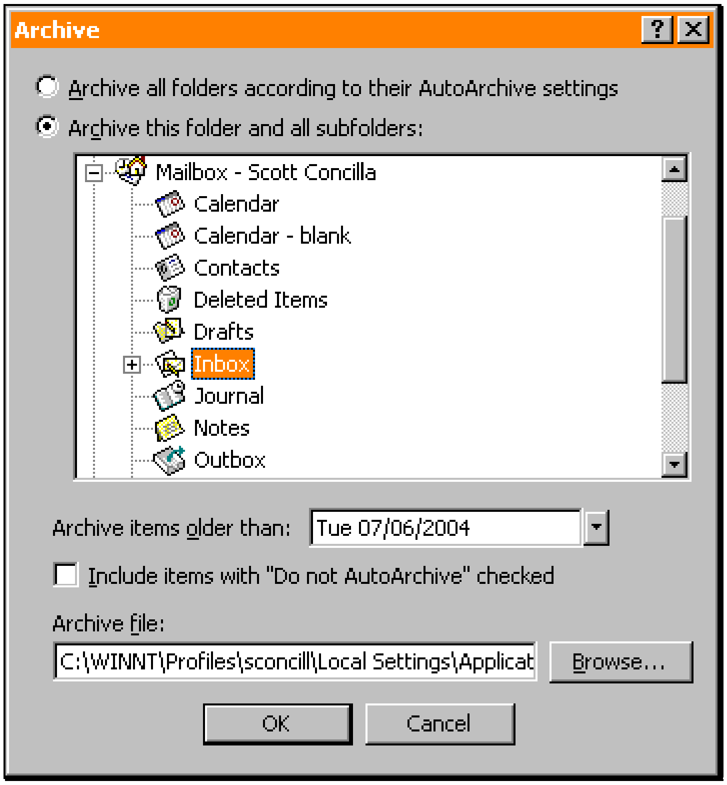
AutoArchive properties do not necessarily have to be set for folders in order to use its features. Setting the AutoArchive properties for a folder configures AutoArchive to run automatically, however, AutoArchive can be run at any time on a manual basis using the same aging criteria as an automatic archiving.

Manual AutoArchive can also be used in cases where an "extra" round of archiving is needed. For instance, when a backup of old Outlook data is desired, or if an account has become full between archiving sessions.

Also, since the Contacts folder does not have AutoArchive properties, items can only be archived using this manual procedure.

Procedure:

1. Select the **File** menu and choose **Archive**. The **Archive** dialog box displays:



Archive

○ Archive all folders according to their AutoArchive settings

● Archive this folder and all subfolders:

- Mailbox - Scott Concilla
  - Calendar
  - Calendar - blank
  - Contacts
  - Deleted Items
  - Drafts
  - Inbox
  - Journal
  - Notes
  - Outbox

Archive items older than: Tue 07/06/2004

☐ Include items with "Do not AutoArchive" checked

Archive file: C:\WINNT\Profiles\sconcill\Local Settings\Applicat

2. Select the **Archive all folders according to their AutoArchive settings** option and then click **OK** to archive all folders using the AutoArchive properties previously set. (All other options in this dialog box become unavailable when choosing this option.)

   OR

   Click **Archive this folder and all subfolders** to select AutoArchive properties for this time only.

3. Select a folder to AutoArchive. If the folder contains subfolders, they will be archived as well.

4. From the **Archive items older than** drop-down list, select the latest date from which Outlook should start archiving data. Items with the date selected will not be archived. For example, if **Thu 07/07/2005** is selected, all items older than that date are archived, but items that have the date of 07/07/2005 will not.

5. If desired, select the **Include items with "Do not AutoArchive" checked** check box to override the **Do not AutoArchive this item** setting of individual items (see the next procedure for more information.)

6. To change the personal folders file that will store the archived items, in the **Archive file** section click **Browse** and then choose the file and folder where the archive will be stored. **At PGW, archive.pst files should NOT be stored on the C: drive of the workstation. Select either the H: or S: drive.**

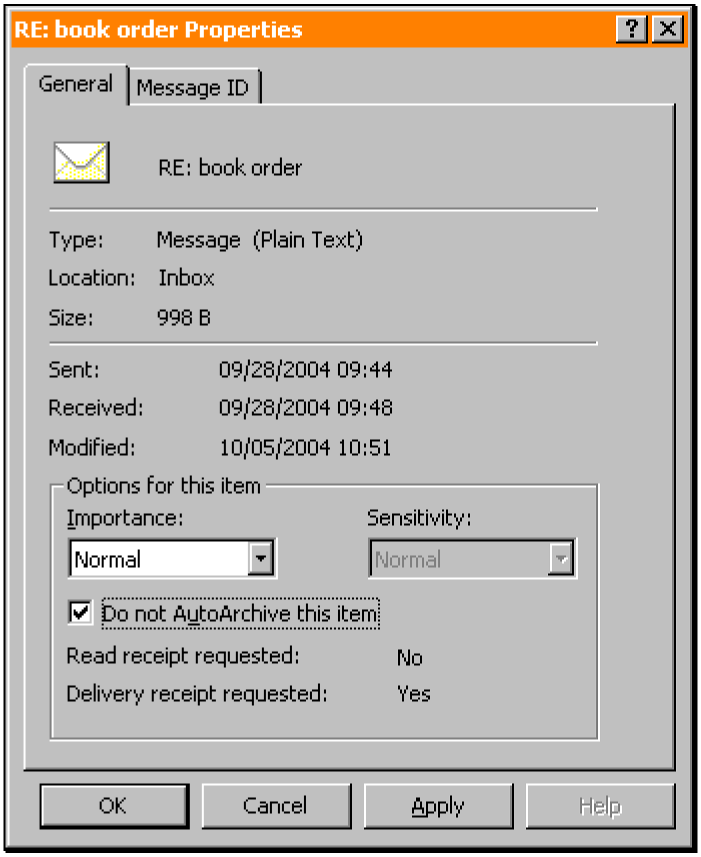
7. Click **OK** to start the AutoArchive process.

Marking Items to not be AutoArchived

Individual items in Outlook folders can be exempted from the AutoArchive process, even when the AutoArchive properties are set for a folder. This procedure can be valuable for items that although they might be old, are still important or relevant to a current project or job.

Procedure:

1. Open the item to be marked.
2. Select the **File** menu and choose **Properties**. The **Properties** dialog box displays.
3. In the **Options for this item** section, select the **Do not AutoArchive this item** check box.



RE: book order Properties

RE: book order

Type: Message (Plain Text)
Location: Inbox
Size: 998 B

Sent: 09/28/2004 09:44
Received: 09/28/2004 09:48
Modified: 10/05/2004 10:51

Options for this item
Importance: Normal
Sensitivity: Normal
☑ Do not AutoArchive this item
Read receipt requested: No
Delivery receipt requested: Yes

4. Click **OK** to return to the item.
5. Close the item to return to Outlook.

Chapter 6

Using the Out of Office Assistant

Chapter Objectives:

- Activating the Out of Office Assistant
- Deactivating the Out of Office Assistant

Chapter 6 – Using the Out of Office Assistant

Overview

The **Out of Office Assistant** specifies an out of office reply and displays, creates, and modifies rules for processing incoming mail while the user is away from the office.

The out of office reply notifies people who sent messages that the receiver is away from the office and cannot reply immediately. The reply will be sent only once to a message sender, even if multiple messages are sent from the same person.

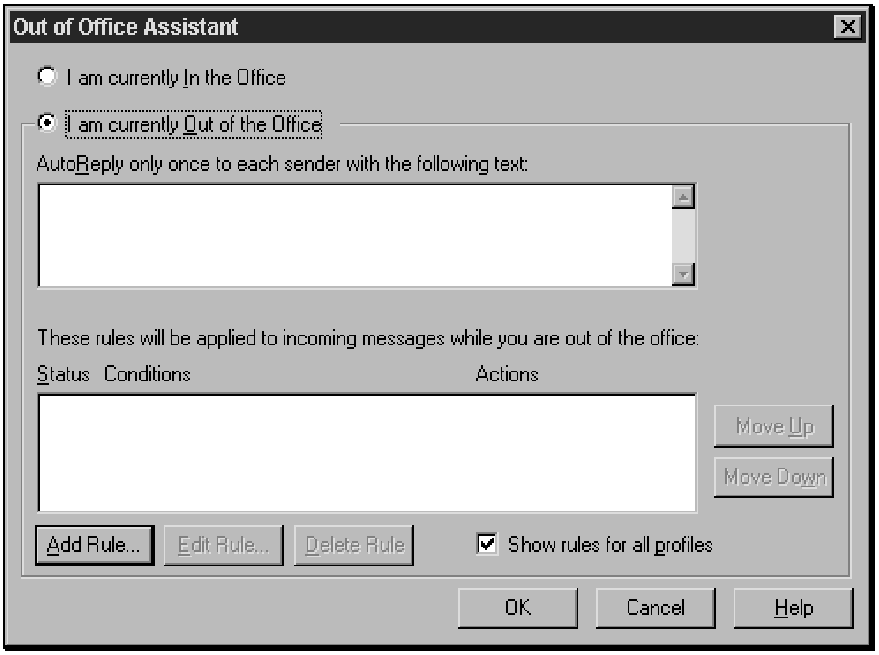
Also, the Out of Office Assistant command may be used to define rules that should only be applied when away from the office. For example, a user can define a rule that automatically forwards high-importance messages to a co-worker, but only when the user is marked out of office.

Activating the Out of Office Assistant

The Out of Office Assistant can be activated for a variety of reasons and lengths of time. The Assistant allows a auto-reply to be created that can contain information about when the user will return and/or who to contact in case the message is an emergency. Depending on the server configuration, the out of office reply will also be sent to internet users.

Procedure:

1. Select the **Tools** menu and choose **Out of Office Assistant**. The **Out of Office Assistant** dialog box displays:



○ I am currently In the Office

● I am currently Out of the Office

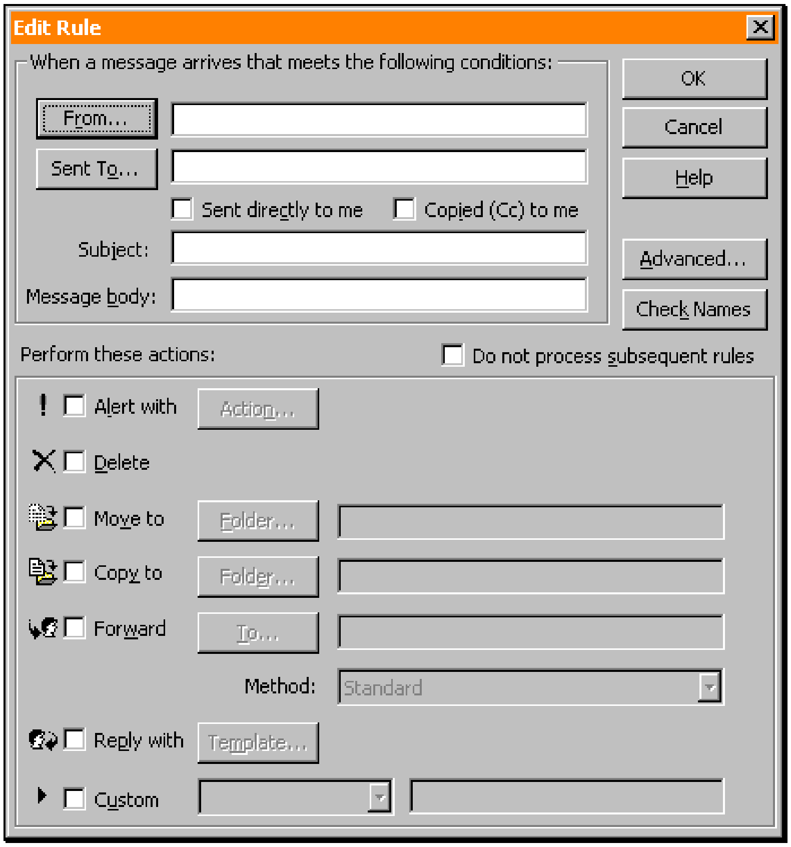
☑ Show rules for all profiles

Out of Office Assistant
AutoReply only once to each sender with the following text:
These rules will be applied to incoming messages while you are out of the office:
Status
Conditions
Actions
Move Up
Move Down
Add Rule...
Edit Rule...
Delete Rule
OK
Cancel
Help

2. Select **I am currently Out of the Office**.

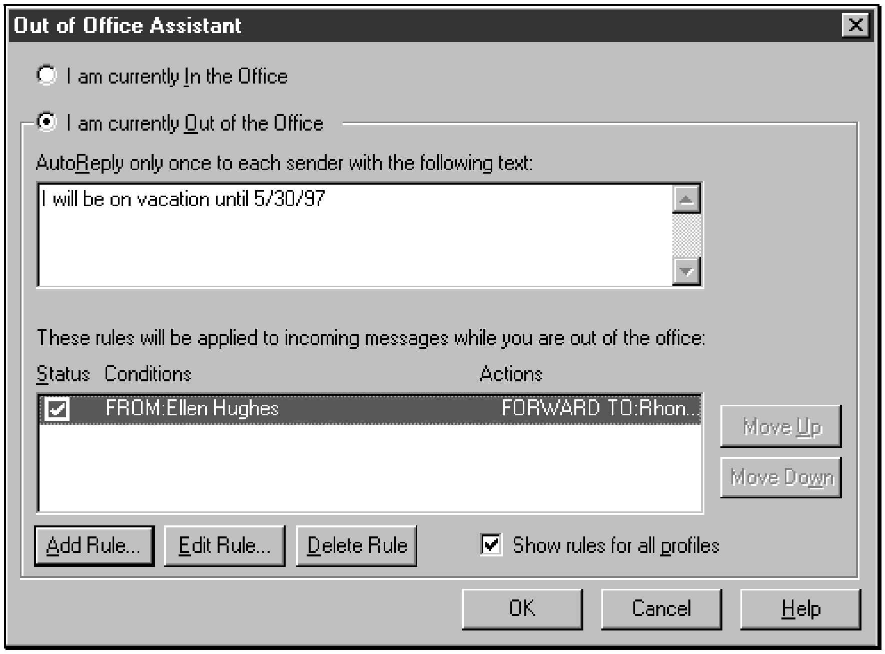
3. Click in the **AutoReply only once to each sender with the following text** box and type in a text message that will be automatically forwarded to anyone who sends mail during the receiver's absence.

4. Optionally, click **Add Rule** to apply any rules to the Out of Office message. These rules work the same as the Inbox Assistant rules, however they are only applied when the Out of Office Assistant is on.


Edit Rule
When a message arrives that meets the following conditions:
From...
Sent To...
☐ Sent directly to me
☐ Copied (Cc) to me
Subject:
Message body:
OK
Cancel
Help
Advanced...
Check Names
Perform these actions:
☐ Do not process subsequent rules
☐ Alert with
Action...
☐ Delete
☐ Move to
Folder...
☐ Copy to
Folder...
☐ Forward
To...
Method:
Standard
☐ Reply with
Template...
☐ Custom

5. Select desired conditions and actions. Click **Advanced** to choose additional requirements, for example, importance of incoming messages and click **OK**.

6. The **Conditions** and **Actions** will appear in the **Out of Office Assistant** dialog box. Click **OK** to accept the rule.


Out of Office Assistant
○ I am currently In the Office
● I am currently Out of the Office
Status
Conditions
Actions
Move Up
Move Down
Add Rule...
Edit Rule...
Delete Rule
OK
Cancel
Help

AutoReply only once to each sender with the following text:

I will be on vacation until 5/30/97

These rules will be applied to incoming messages while you are out of the office:

Status	Conditions	Actions
☑	FROM:Ellen Hughes	FORWARD TO:Rhon...

☑ Show rules for all profiles

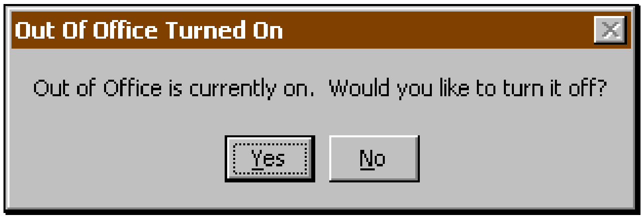
7. Click **OK** to activate the assistant.

Deactivating the Out of Office Assistant

When it is no longer the needed, the Out of Office Assistant can be turned off so that e-mail is processed like normal.

Procedure:

1. Start Microsoft Outlook.
2. If the Out of Office Assistant is on, Outlook displays the following dialog box:


Out Of Office Turned On
Yes
No

Out of Office is currently on. Would you like to turn it off?

3. Click **Yes** to turn the assistant off. Click **No** to leave the assistant on and continue to work in Outlook.

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