

OUTLOOK TRAINING

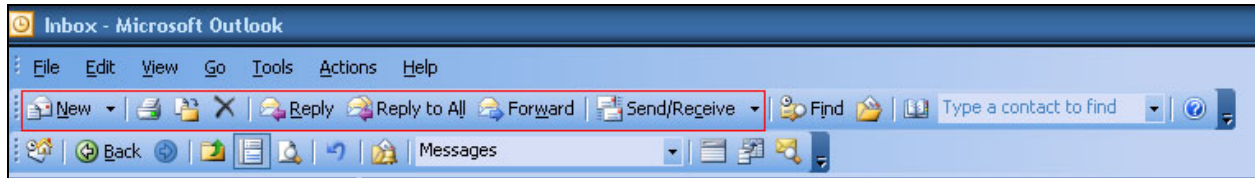
Desktop Client

By Christopher Yandle

The Outlook Interface

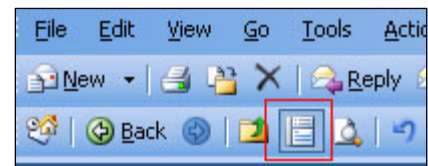
Standard Menu

The standard menu is on by default, this top row of buttons cover all key areas of mail creation, deletion, moving, replying, and finding contacts.



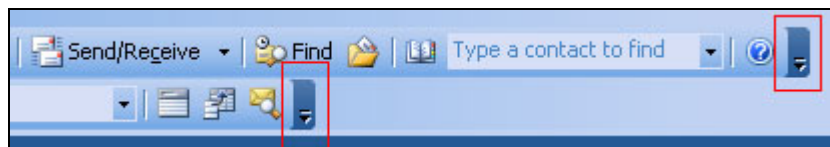
Advanced Menu

The advanced menu can be turned on by going to **[view] [toolbars]** and checking the **[advanced]** box. The advanced menu has navigation buttons for home page, back and forward buttons to move through your messages and folders. The reading page icon allows you to toggle preview of the mail message without launching a second window. It is the fifth button from the left. You can also toggle the reading pane as well as set its placement by going to **[View] [Reading Pane]**.



Expanding Arrows

Many buttons will have a small downward pointing arrow to the right side. Clicking on this arrow area will expand a menu with advanced options for that item.



Email Functions

New Message

New mail messages can be created using the **NEW** button

Reply to a message

To reply to a message, have the message you want to reply selected. Then click the **REPLY** or **REPLY TO ALL** button.

Delete message

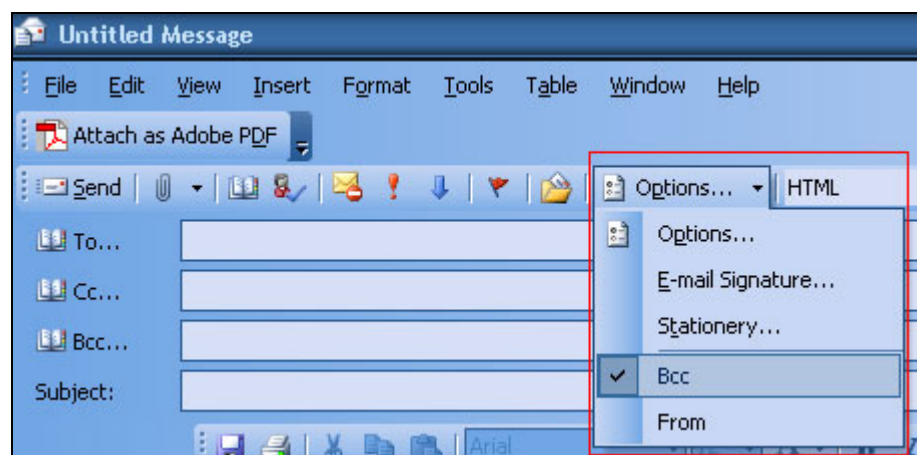
To delete a mail message select the message and click the **X** icon beside reply or use the delete button on the keyboard.

Save as Draft

To Save a mail message as a draft, create a new message as if you were going to send it. Compile your message and then go to **[File] [Save]**. You can now close your message box. Your draft message will be stored in the Draft folder.

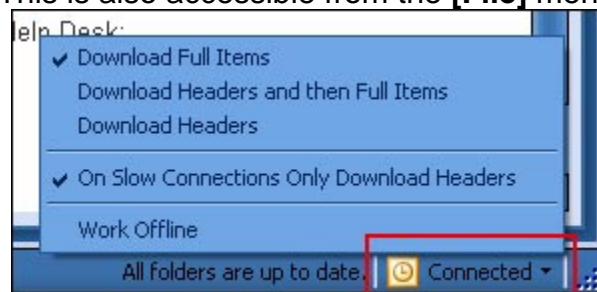
BCC Field

To turn on the BCC field (it's off by default), create a new mail message and click the **options arrow**. This will expand a list that has BCC option listed. You only need to check this option once for all future messages.



Send/Receive

Outlook will automatically send and receive emails periodically. If you get disconnected from the server you can reconnect by click on the expanding arrow in the far bottom right of your client. Here you can toggle the work offline option to log on or off the server. This is also accessible from the **[File]** menu.



Sort Messages

To auto sort messages simple click on the method of sorting above your mail messages. Options include: from, subject, date, file size, flagged, icon, attachment, importance, and header status.

From	Subject	Received
Today		
Lori D Smith	Network backbone upgrade - October 15-17	Tue 9/20/
Smith, Lori	RFI - Outlook training	Tue 9/20/

E-Mail Stationary and Signature

You can setup a custom look or stationary for your outgoing email. To access the stationary area click on **[Tools] [Options]**. From this window select the mail format tab. The bottom two areas are used to customize your stationary and signature settings. You can use the picker to select a preconfigured stationary theme or use the font's button to create your own customized fonts.

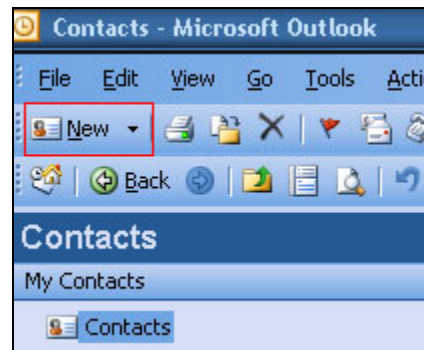
To create a new signature click on the signatures button, from this new screen you can edit existing signatures or click new to create one. You have the basic Microsoft word formatting to customize the look of your signature. Once you have completed your edits or creations, click OK to save, and then OK to exit the following pages. Set your signature type for new messages or message replies from the mail format tab.

Contacts

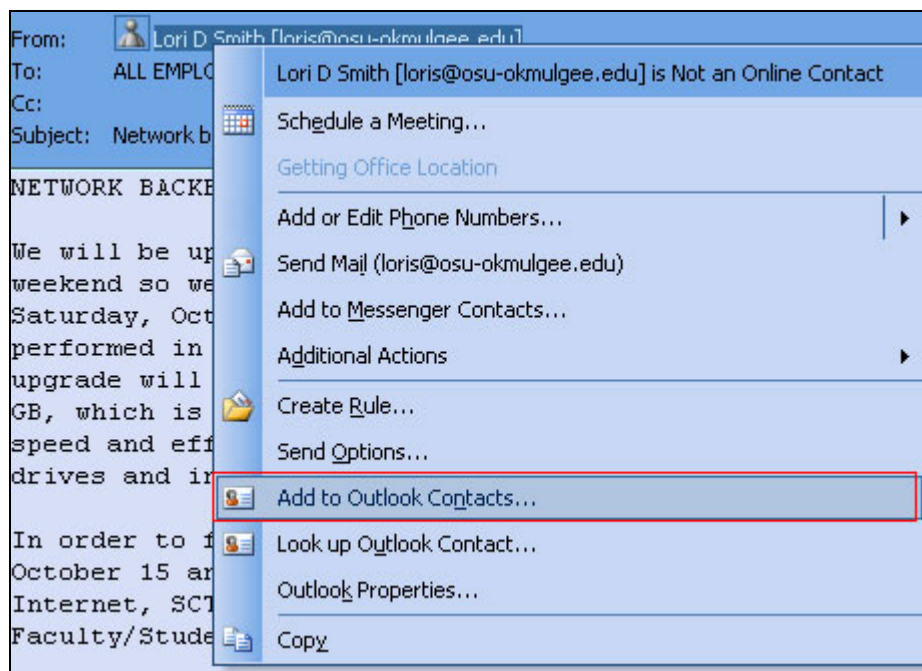
Create a new Contact

There are three ways to add new contacts

1. Click on the **expanding arrow** beside the **[New]** button and then select contact.
2. Go to **[Contacts]** and click **[New]** - Insert information

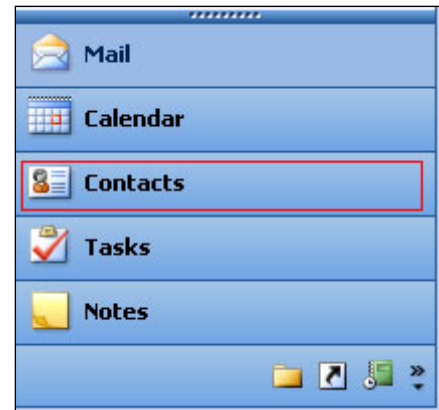


3. Open email, right-click sender's name, click **[add to Outlook contacts]**



View Contacts

To View your contact list click on the contacts box located on right left hand side of the client.

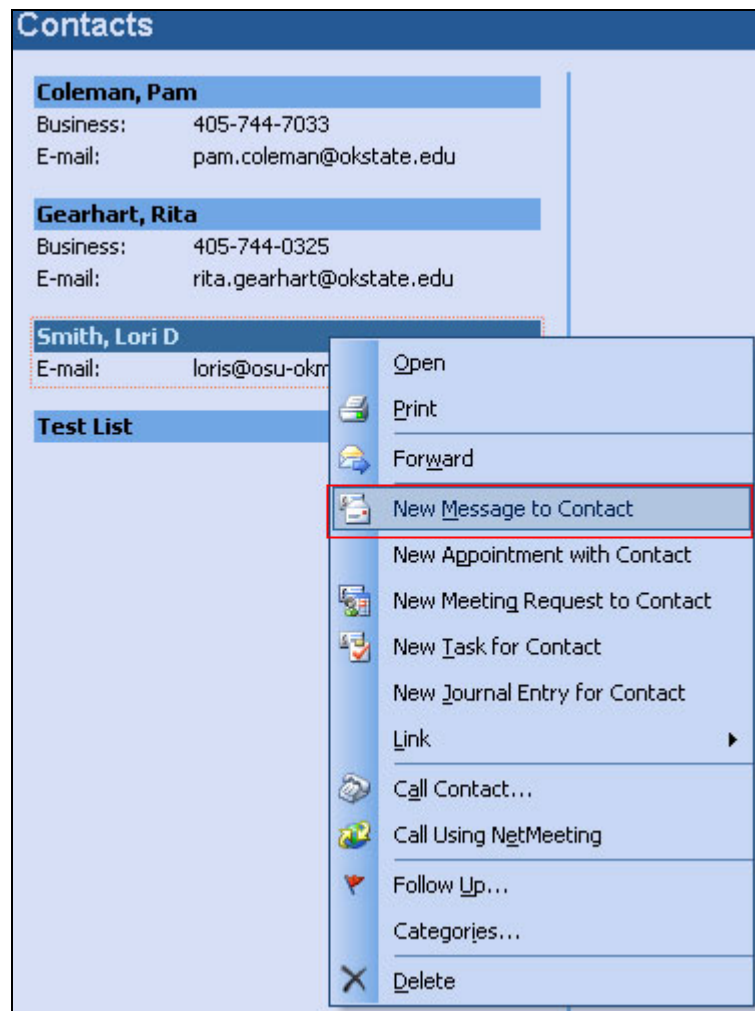


Edit Contacts

To Edit an existing contact simply double click on the contact entry or do a right mouse click and then open. You can send a new message as well as many other features by right clicking on the contact entry or by selecting the contact entry and then **[Action]** from the main menu.

Create a new message to a contact

To create a new mail message or other calendar function simple right click on the contacts name and choose the desired action.



Create a Distribution List

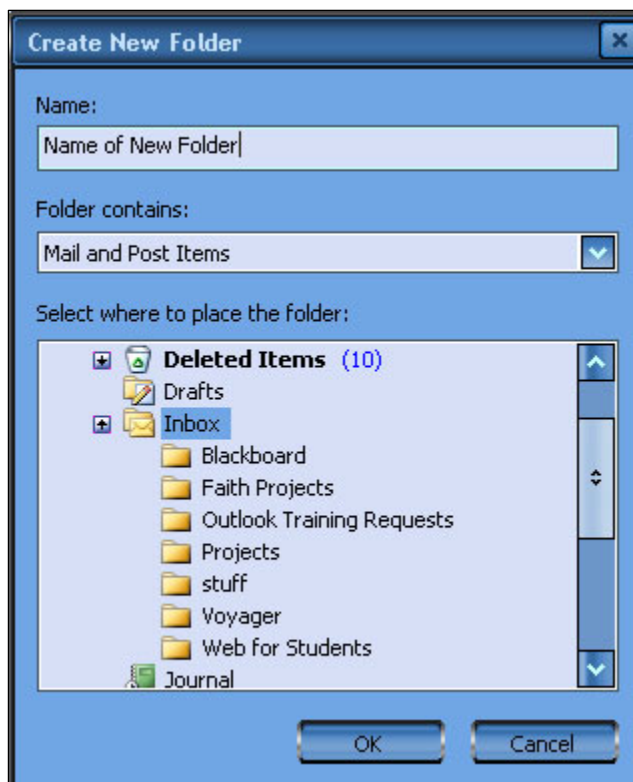
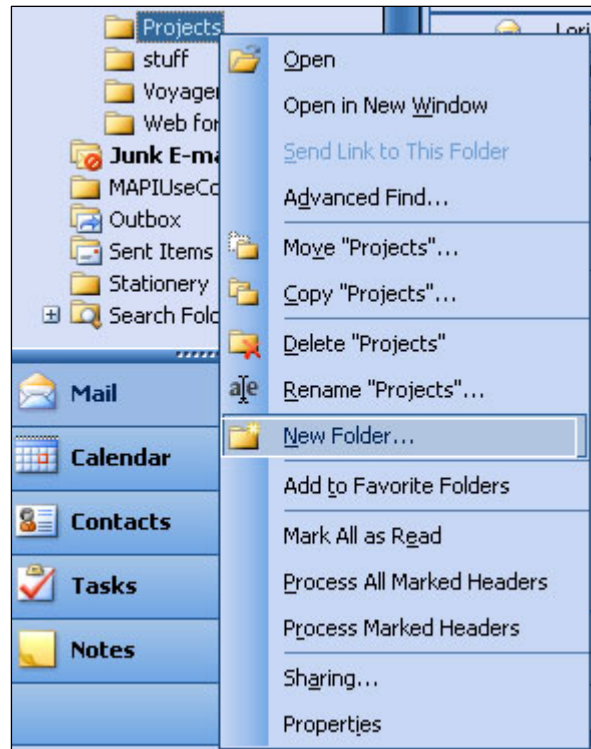
To create a distribution list (a single contact entry with multiple recipients) from the main menu go to **[Action] [New Distribution List]**. A new window will appear. Enter a name to associate to this list, and then begin adding people using the select member's button. When finished click the Save and Close button. Your new list will appear with your contacts.



Folder Functions

You may create a folder from within any part of Outlook (*inbox, calendar, contacts, etc.*)

1. Clicking the arrow next to **[New]**
2. From received email – click **[move/copy]** icon and create new folder there
3. Click **[Ctrl+Shift+E]**
4. Right click from the place you wish to create a new folder.

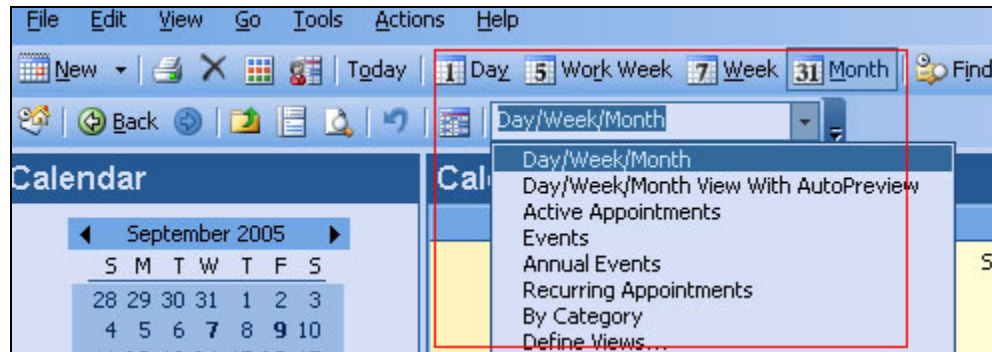


Name the new folder

Type in the name for your new folder. You can also change the location of the parent folder by selecting where to place the folder in the tree listing.

Calendar Functions

There are many different views for your calendar. Simple select your desired format in the menu bar shown below.



Create a new calendar entry

You can create a new entry in many ways

1. Click **[New]** for a quick single appointment date
2. Click **[File] [New]** and the type of entry you wish to create.
3. Click **[Action]** and the type of entry you wish to make
4. Find the date of the entry to be added and right click the mouse on the calendar for creation options

Only options 3 and 4 will have your full range of calendar entry types. Types include new appointment, new meeting request, new all day event, new recurring appointment, new recurring meeting, new recurring event.

Moving an email message into a calendar entry

From the email message you wish to create an entry for simple left click and hold the email and drag over to the calendar button. You will then be prompted to enter your calendar options.

Sharing Calendars and Contacts

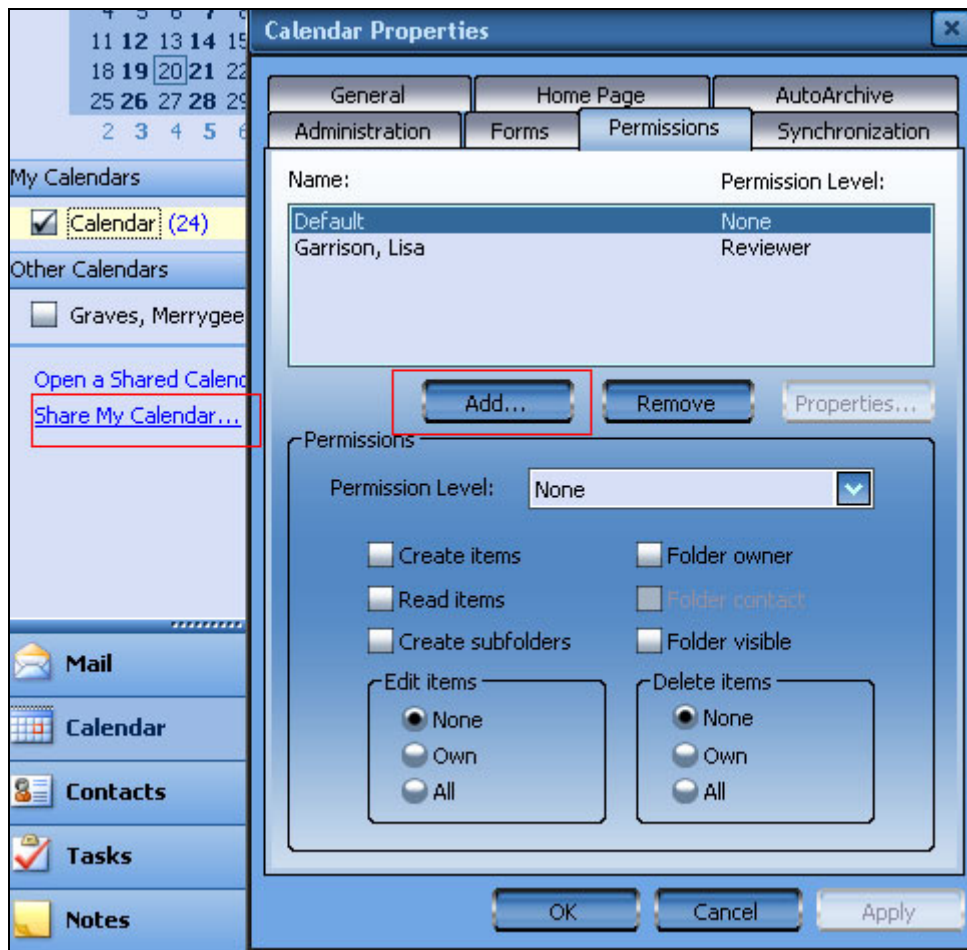
To share your calendar or contact list, or to add shared calendar or contact, click on the appropriate link on the left hand side of Outlook. You can then add selected people to view your calendar, or search for someone's calendar you wish to view. Once added a shortcut to the shared calendar will appear on your list to the left. You can toggle the view on and off by using the checkboxes on the calendar. With contacts you just click on the list you wish to view.

Permission Levels

You can add multiple users to the permissions of your shared calendar, including giving people ownership level in which they can add or delete entries from your calendar or contacts. Be sure to review the permission level you desire for the individual or group you are giving access to.

Copying items from other resources

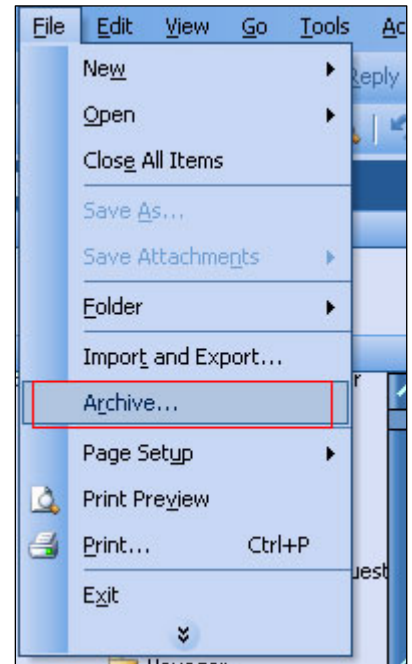
When viewing a shared resource you can drag and drop items from a shared source to yours. This simple copies the entry onto your calendar or contact list.



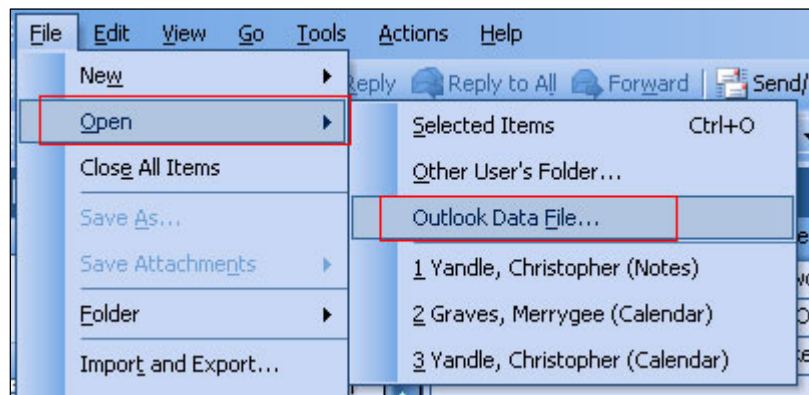
Archiving

Every user has a **500 Meg email storage limit**. If you are approaching the limit or wish to clear out some messages without deleting them, you can use the archive option.

To archive email go to **[File] [Archive]** you will then be prompted with some options and the ability to select a folder to archive. You will also select a location to store the archive. The format of the archive is a .pst file. Once all your settings are completed click **[OK]** this function will remove your messages tagged for archiving and store them exclusively in the archive. The only way to restore these messages is through the archive file.



To restore an archive click **[File] [Open] [Outlook Data File]** select your archived file and it will be restored to an archived folder. This does not recreate the mail on the exchange server. You are simply accessing the archived



messages from your file. To move the messages back to the server, simply drag the messages to your desired folder located in your inbox.

Frequently Asked Questions

Will there be an OSU-Okmulgee specific address book?

Yes, once the entire campus has been migrated an address book can then be created.

Will there be global user groups?

As with the OSU-Okmulgee specific address book, custom groups will be created once the entire campus has been migrated.

How can I reply to an email without a copy of the email?

This is a setting found in **[Tools] [Options] [Email Options] [Replies and Forwards]** Changing this setting will make it a default for all replies, there is no way to reply selectively with copy and sometimes without. In outlook it is a single setting. You can however leave the reply with copy turned on and simple delete the copied content from the email.

I hit the Send/Receive button and I get an error.

With a default installation of outlook you do not need to hit the send/receive email button. While you are connected to the exchange server you will automatically send and receive messages within seconds of its arrival or sent status. You can ensure your connection by looking at the lower right hand corner of the client. As long as you are listed in a **connected** status sending and receiving will be automatic. However, if you change some settings in email options you may break this functionality.

Can people read my email if I am away from my computer?

Outlook does keep a cached copy of your email on your desktop. If you leave your computer for an extended amount of time you should lock your computer from use. To do this simple go to **[Start] [Log Off]**. This will keep you computer on but lock it from use; only entry of a proper password can unlock the machine.

Outlook Web Access Limitations

The web version of Outlook has a few limitations. While the bulk of functionality will be intact the following differences need to be noted:

- Limited drag and drop functions
- Shortcut keys do not apply
- Can not share or view shared calendars or contacts
- Can not archive messages
- Limited spam blocking filters

Links

Outlook Web Access - <http://mail.okstate.edu/>

Spam Blocker Login - <https://spamblocker.okstate.edu:10010/enduser/login.cgi>

Campus Directory - <https://app.it.okstate.edu/directory/>

OSU-Okmulgee Employee Website - <https://www.osu-okmulgee.edu/employees/>

Resources

Office Outlook 2003 Training Document (current)

Office Outlook 2003 Keyboard Shortcut Document

Version 1.2
Last updated November 16, 2005