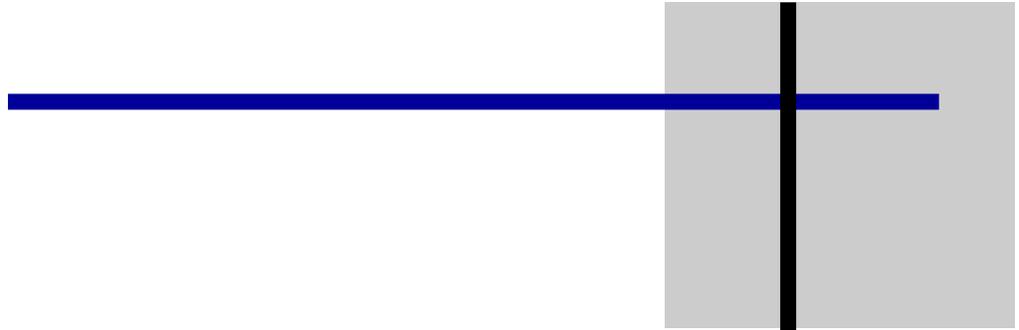


Microsoft Outlook Tips & Tricks



Columbia College
Technology Services

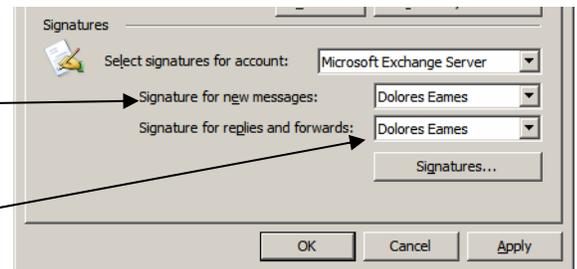
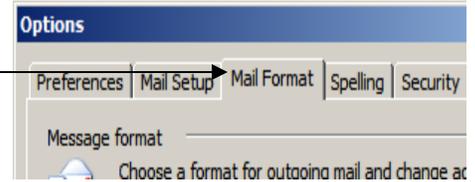
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Creating an email signature

An e-mail signature is a unique message automatically added to the end of an outgoing e-mail message. It can consist of text and/or pictures. You may create different signatures to be used for new messages or replies and forwards.

1. With the *Inbox* window active, click **Tools** → **Options**.
2. At the *Options* dialog box, click the **Mail Format** tab.
3. Click the **Signatures** button at the bottom of the box.
4. The *Create Signature* dialog box will open. Click **New**.
5. When Outlook displays *Create New Signature* dialog box, type the name of your new signature, for example *Reply* or your name.
6. Click the **Next** button.
7. At the *Edit Signature* dialog box, type the text you want displayed as your new signature. For example, name, address, and phone number.
8. Click **Finish**. Click **OK**.
9. At the *Signatures* section of the *Options* dialog box. You may select when you would like your new signature to be used.
 - If you want the signature to be used for new messages, select the signature name for the corresponding drop box.
 - If you would also like the signature to be used for replies and forwards, you may also select it from the drop down menu for that option.
10. Click **OK**.

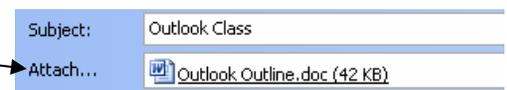


Handling attachments

In some situations, a simple email message is not sufficient to get the required information to the recipient. In these cases, you may want to attach a file to your email message. Outlook allows you to attach almost any kind of file to your message. You may want to send a Word document, an Excel worksheet, a picture, or any number of file types.

Sending an attachment

1. Create a new email. Enter the recipients of the message and type a subject.
2. Click the **Insert File**  button.
3. The *Insert File* dialog box will open. Locate the file that you would like to send and select it.
4. Click the **Insert** button. A new line titled *Attach... will* appear below the subject. It will include an icon for



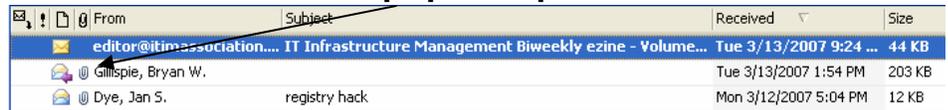
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the file type you are sending and the name and size of the document. You are limited to sending 10MB of attachments in a single email from your CCIS Outlook account.

5. Type the text in the body of the message. Be sure to state that you are sending an attachment.
6. Click **Send**.

Opening an attachment

1. When receiving an email with an attachment, the **paper clip** icon will be visible in the message header.
2. Open the email.
3. Double-click the attachment icon on the attachment line. This icon will be different, depending on the type of file sent.
4. When Outlook displays the *Opening Mail Attachment* dialog box, click **Open**.
5. You may receive the *Welcome to Reading Layout* dialog box. If so, click **OK**.
6. You may save the file to the location of your choice or close it when you are finished viewing the document.



The screenshot shows an Outlook email header with a table of attachments. A paper clip icon is visible next to the first attachment, which is highlighted in blue. An arrow points from the text 'the paper clip icon' in the preceding list item to this icon.

From	Subject	Received	Size
editor@itimaassociation...	IT Infrastructure Management Biweekly ezine - Volume...	Tue 3/13/2007 9:24 ...	44 KB
Gillispie, Bryan W.		Tue 3/13/2007 1:54 PM	203 KB
Dye, Jan S.	registry hack	Mon 3/12/2007 5:04 PM	12 KB

Saving an attachment

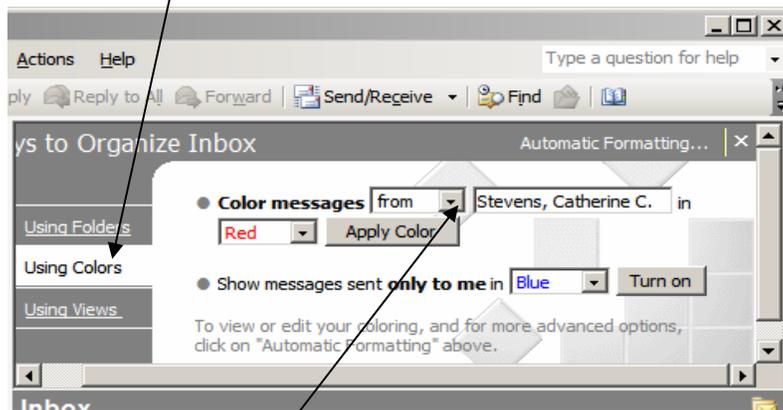
In some instances it is necessary to save attachments. It may be a file you need to edit, or you may prefer not to store files in your email, but rather on your computer's hard drive or network drive.

1. When receiving an email the **paper clip** icon in the message heading will indicate the email message contains a file attachment.
2. Open the email.
3. Double-click the **attachment** icon on the attachment line. When Outlook displays the *Opening Mail Attachment* dialog box, click **Save**.
4. The *Save in* dialog box will open. At the *Save In* drop down menu select the location you would like to store the document.
5. Click **Save**.

Utilizing colors to organize email

Use this mode to apply a specific color to messages with a specific sender or recipient. Outlook changes the color of the message header in the Inbox accordingly. You can also specify the color of messages sent only to you. Color selection and the meaning of each color are entirely at the discretion of the user.

1. With the *Inbox* window active, click **Tools → Organize**.
2. Select **Using Colors**. You will have several options for using color to organize your email.



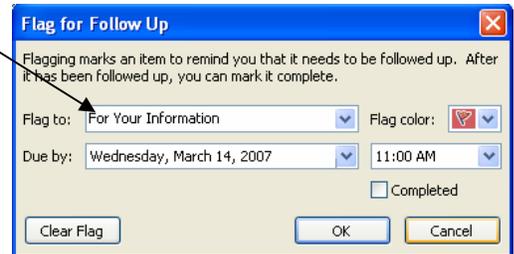
- At the *Color Messages* drop down menu you may select *from* or *sent to*.
- Type the name or email address of the person for whom you would like to specify a color.
- Select a color from the list of colors provided.
- Click **Apply Color**.
- If you would like messages that are sent only to you (as opposed to a list of people) to stand out in your *Inbox* select a color from the drop down menu at *Show messages sent only to me*.
- Click **Turn on**.

To exit the Organizer view, click the X in the upper right corner.

Email Follow up Flags

You can use follow up flags to help you to organize your emails. If you receive an email that you need to take action on at a later date, you can flag it and set a reminder so you will remember to complete the task. Flags can be assigned one of six different colors.

1. Right click an email message and select **Follow-up → Add reminder** from the shortcut menu. The *Flag for Follow Up* dialog box will open.
2. At the *Flag to* drop down list, select the applicable task related to the message. You may select such options as *call* or *reply*.
3. Select a flag color. You may decide on your own color scheme. For example, all urgent requests may be flagged in red, all emails that need a phone call may be flagged in blue.
4. If you would like a reminder to pop-up, select a date in the *Due by:* field. You may also select a specific time.
5. Click **OK**. A flag will appear in the right of the email detail line.



Marking a follow up as complete

1. Right click on the email message which contains the flag you would like to mark as complete.
2. From the shortcut menu select **Follow-up → Flag Complete**. The colored flag will be replaced with a check mark.

Managing Mail with folders

Outlook provides several ways to organize your data. Creating folders allows you to store specific emails based on their subject. It helps to keep your Inbox neat and makes it easy to find emails when you need them.

Creating folders

1. Click **File → New → Folder**.
2. In the *Name* box, enter a name for the folder.
3. In the *Folder* box **Mail and Post items** should be selected.
4. In the *Select where to place the folder:* list click the location you would like to store the new folder. For email, you will want to select **Inbox**.
5. Click **OK**. The folder will appear under the folder list under *Inbox* on the left side of your screen.

Moving mail to folders

Once you have created your new folder you will want to start organizing your email.

1. Select the folder that includes the message you want to move, this will most likely be your Inbox.
2. After the folder opens, right-click the message you would like to move and click **Move To Folder** from the shortcut menu. The *Move Items* dialog box will open.
3. Select an existing folder from the list.
4. Click **OK**, the message is moved to the selected location.

Deleting folders

You may decide you no longer have use for a folder you created. If so, you may delete the folder. This will delete the contents as well as the folder.

1. Right Click on the folder you would like to delete.
2. Select **Delete** from the shortcut menu.
3. Click **Yes**.

Renaming folders

Perhaps a person's name has change, or you misspelled a folder name. In this instance you may need to rename a folder.

1. Right Click on the folder you would like to rename.
2. Click **Rename**.
3. Type the new name for the folder.
4. Press **Enter** on your keyboard.

Searching for an email

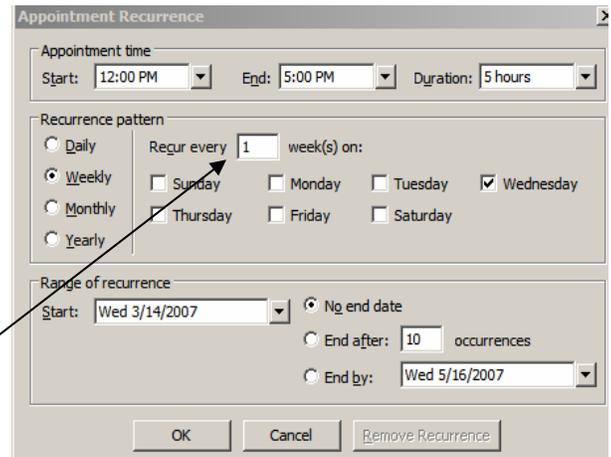
1. Click the **Find**  button on the Standard toolbar to display the *Search* toolbar. It will appear directly below the *Find* button.
2. In the *Look for:* box type any text you want to search for. This could be an email address, a name or text from the subject or body of the email.



3. At the *Search In* drop down menu select which folder(s) you would like Outlook to search in for the mail item. Try to be as specific as possible so you are not overwhelmed with results. For example, if you know you are searching for a message you sent, select *Mail I sent* so Outlook will only search your Sent mail.
4. Click **Find Now**. A list of matching messages will appear. You may need to refine your search if what you are looking for is not found or too many results are available.

Creating a recurring appointment or event

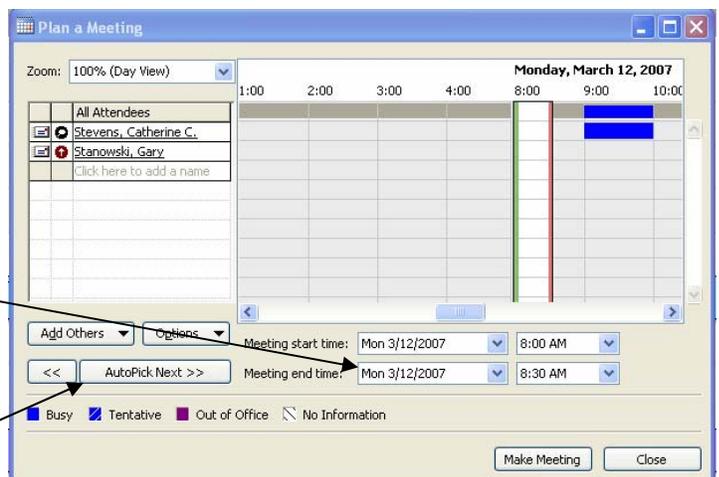
1. Open the appointment or event you want to make recurring or create a new appointment or event.
2. Click the **Recurrence**  button.
3. Select a start and end time for the appointment.
4. At *Recurrence Pattern*
 - Select the frequency of the meeting (*Daily*, *Weekly*, *Monthly* or *Yearly*).
 - Establish how often the meeting will occur, once every week, once every two weeks? The *Recur every* field allows you to set the frequency.
 - Select the day(s) of week the meeting will occur.
 - In the *Range of recurrence* section, check to be sure the start date is correct and select one of the radio buttons establishing when the last meeting will occur.
5. Click **OK**.
6. Click **Save and Close** in the calendar entry.



Scheduling a meeting

In the calendar you can schedule regular appointments, all day, multi-day events or meetings. An appointment becomes a meeting when you invite other people, which requires coordinating others' schedules.

1. Click **Actions** → **Plan a Meeting**. The *Plan a Meeting* dialog box will open.
2. Click **Add Others** → **Add from Address Book**.
3. In the *Type Name or Select from List* box, begin typing the last name of a person you want to invite to the meeting. Their name will appear in the list.
4. Select the name of the person you are inviting in the list and click **Required** or **Optional**. The Required and Optional attendees appear in the *To* box on the *Appointment* tab of the meeting entry.
5. Once you have selected all of your attendees, click **OK**.
6. You will notice the key at the bottom of the box helping you to determine when each person has free time. Select a time when all invitees are available. You can select a date and time you would like OR
You can use **AutoPick Next** to find the next available free time for all invitees.



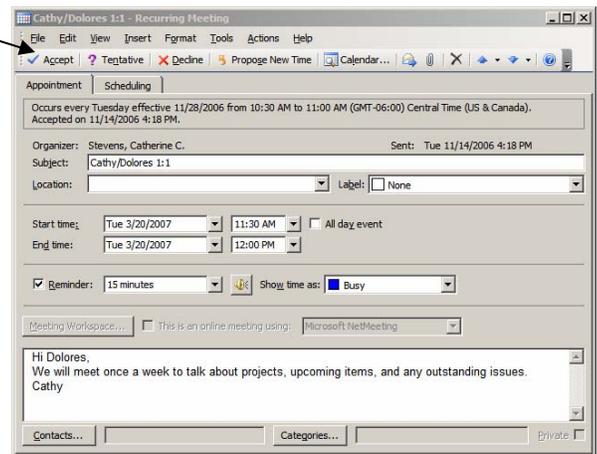
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7. Click **Make Meeting**.
8. In the *Subject* box, type a description.
9. Enter the location of the meeting in the *Location* box
10. If you want to make the meeting recurring, click **Recurrence**, then select the recurrence pattern.

Responding to a meeting request

When you send a meeting request, a meeting request e-mail message is sent to the invited attendees. This message allows the attendees to accept, tentatively accept, reject the meeting invitation, propose a new time for the meeting, or include a message in the reply.

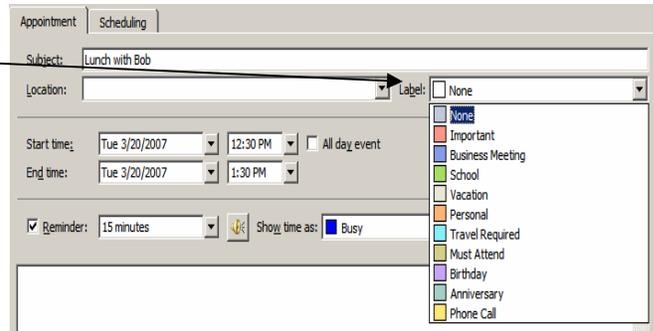
1. Open the meeting request.
2. Click on **Accept**, **Tentative**, **Decline** or **Propose New Time**.
 - Selecting *Accept* will make an entry on your calendar.
 - Selecting *Tentative* will make an entry on your calendar, but it will not be blocked as "busy".
 - Selecting *Decline* will not place an entry on your calendar.
 - Selecting *Propose New Time* will allow you to search for a new time when all invitees are available.
 - Regardless of which option you select an email will be sent to the meeting organizer letting them know your status.
3. If you select *Accept*, *Tentative* or *Decline* you will be given you three options. Select the option that is applicable to you.
 - *Edit the response before sending* - allows you to send additional comments with your response.
 - *Send the response now* - sends the response only, with no additional comments.
 - *Don't sent a response* - cancels your response.
4. Click **OK**.
5. If you selected *Edit the response before sending*, you will be given an email form in which to type your comments, then click **Send**.



Using calendar labels

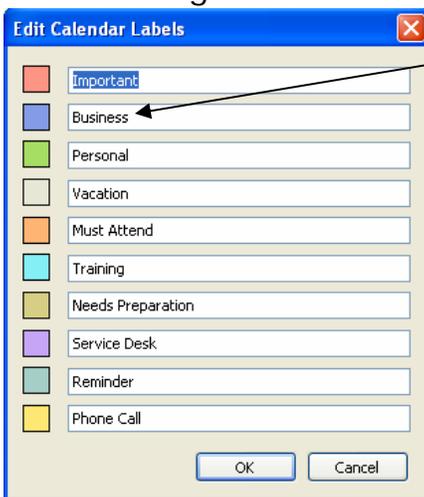
The Label drop-down list on the appointment form shows the different color labels you can assign to an appointment as a visual cue to indicate the purpose of the appointment, its importance or requirement. Outlook has predefined labels created for you, however you may change the text of any labels.

1. Create a new appointment or open a previously scheduled appointment.
2. At the *Label* drop-down list, select the desired category.
3. When you have completed all the fields for your meeting entry click **Save and Close**. It will be highlighted in the selected color.



Editing labels

1. In *Calendar* view, click **Edit** → **Label** → **Edit Labels**. You may change all or some of the categories.



2. At the *Edit Calendar Labels* dialog box type the text you want to associate with each color. You may change all or some of the labels.
3. Click **OK**. When you create new calendar entries or edit old calendar entries your new labels will be available for you to select from.

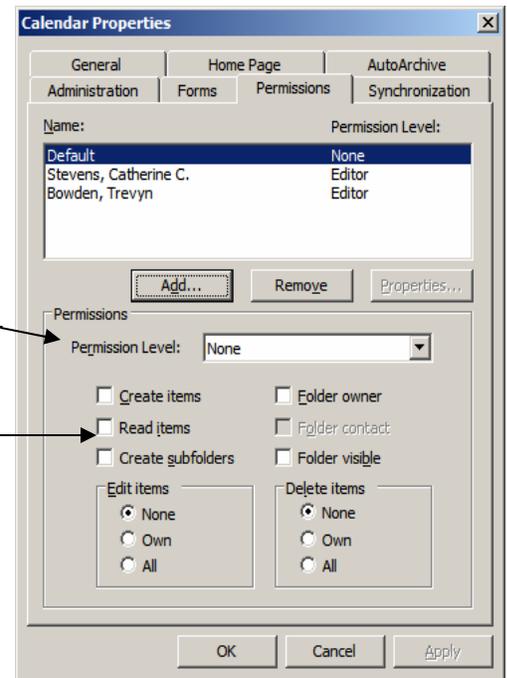
Sharing your calendar

You can allow others to access your entire calendar or selected calendar items. You may give them permission to edit your calendar, or just to view it. To share your calendar and its items, you must set permission levels for various users.

1. In the *Calendar* view click **File** → **Folder** → **Sharing**.
2. Click the *Permissions* tab to view the current permissions for your calendar.
3. Click the **Add** button to provide access to a user. The *Add users* dialog box will open.
4. In the *Type Name or Select from List:* box type the last name of the person you would like to give access to.
5. When you see their name in the list, click on their name and click **Add**.
6. Repeat steps 4—5 to add more users. Click **OK** when you have finished selecting your list.
7. At the *Calendar Properties* box select the user's name and then select the permissions level from the *Permission Level* drop-down list.

As you select different levels of permissions you will notice the options will change in the list below.

- The most common status is the *Reviewer*, which will provide access for someone to see your calendar, but not edit it.
 - Another common status is *Editor*, which will provide someone with rights to read, create and delete items on your calendar. You may customize any of the permission levels by selecting or deselecting the check boxes.
8. Click **OK**.



Opening a shared calendar

Once someone gives you “permission” to access their calendar, you will need to open it at your computer.

1. At the *Calendar* view click **File** → **Open** → **Other User's Folder**.
2. Click **Name**. From the list, select the name of the person whose folder you would like to view.
3. Click **OK**. The folder will open and will also appear in your *Other Calendars* list on the left side of your calendar. In the future you can place a check mark next to the calendar you would like to view.

Marking an appointment private

Outlook gives you the option to make an appointment private. If you choose to do this, a person with permission to view your calendar will see the time is blocked out on your calendar but will not be able to see the appointment details.

1. Create or open the appointment or meeting that you want make private.
2. Select the **Private** check box in the lower right corner.
3. When all the fields in your calendar entry are completed, click **Save and Close**.

The screenshot shows the Outlook appointment form with the following fields and options:

- Subject: [Text box]
- Location: [Dropdown menu]
- Label: None [Dropdown menu]
- Start time: Tue 3/13/2007 8:00 AM [Dropdown menu]
- End time: Tue 3/13/2007 8:30 AM [Dropdown menu]
- All day event:
- Reminder: 15 minutes [Dropdown menu]
- Show time as: Busy [Dropdown menu]
- Private: (indicated by an arrow from the text above)

Contacts

Contacts is an Outlook tool to help you organize and store addresses, phone numbers, email addresses and other information about people you may need to communicate with.

Creating a contact

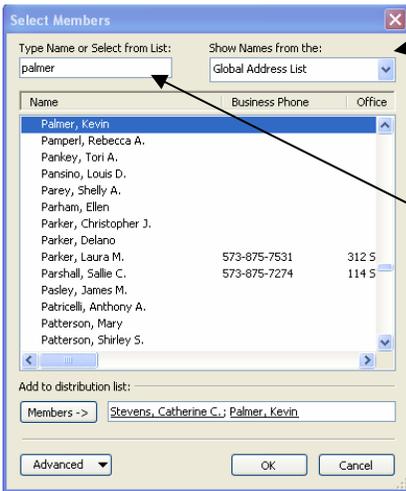
1. Click **File → New → Contact**.
2. Type a name for the contact.
3. Enter the information you want to include for the contact.
 - You can specify how you want the contact's name to appear in the *To:* line of message by typing the name in the *Display As* box.
 - To enter multiple entries in a field such as more than one address or email address, click the drop down arrow next to the field. ⌵
4. When you have entered all the data for your contact, click **Save and Close**.

Creating a distribution list

1. In the *Contacts* view, click **File → New → Distribution List**.
2. When Outlook displays the *Untitled - Distribution List* window, type the name of your list in *Name:* box.
3. Click the **Select Members** button.

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4. When Outlook displays the *Select Members* dialog box Select the address book you would like to choose names from at the *Show Names from the:* drop down menu.



- If the person has an @ccis.edu address leave the selection as *Global Address List*.
 - If the person you would like to add is in your personal address book, select *Contacts*.
5. Type the last name of the person you would like to add to your list in the *Type Name or Select from List* box.
 6. The person's name should appear in the list. Select the member's name you would like to add to the distribution list and click **Members**.
 7. Repeat steps 4 - 6 until you have added all members to the list.
 8. Click **OK**.

9. If you would like to add members who are not in your *Contacts* list or the *Global Address List*, click **Add New** at the *Distribution List* window.

- Enter the Display name and the email address of the contact in the appropriate fields.
- Click **OK**.

10. Click **Save and Close**. You may use this list by selecting it from your *Contacts* when creating a new email.

Creating a task

Outlook provides the a way to track your task. This feature is an effective way to create and manage tasks. You can create a one-time task or recurring task. There is the ability to track the amount of time spent on a particular task, as well as keep details.

1. Select **File → New → Task**.

2. In the *Subject box*, type a task name.

3. If you would like to assign the task to someone you can click the **Assign Task** button.



- In the *To:* field type the email of the address of the person you would like to assign the task to.
- You may choose to deselect the update options on the task if you do not want to be updated on it's status

4. You may select a due date, start date and priority, but none of these fields are required.

5. In the body of the task, type any relevant details.

