Catholic Archdiocese of Atlanta

Outlook 2003 Training

Information Technology Department of the Archdiocese of Atlanta

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Barracuda Spam Filter

What is the Spam Filter MS Outlook Plug-in?

The Spam Filter MS Outlook Plug-in is a plug-in for the Windows versions of Outlook. The plug-in allows a user to classify messages as spam or not-spam right from their desktop. This classification performs Bayesian learning and results in higher accuracy for the Spam Filter System.

To download the plug-in, type in the following link in the Internet Explorer address bar:

http://67.32.0.130:24900/cgi-bin/plugins.cgi?locale=

Click Download Now
Click Open or Run and follow the prompts to install the plug-in.

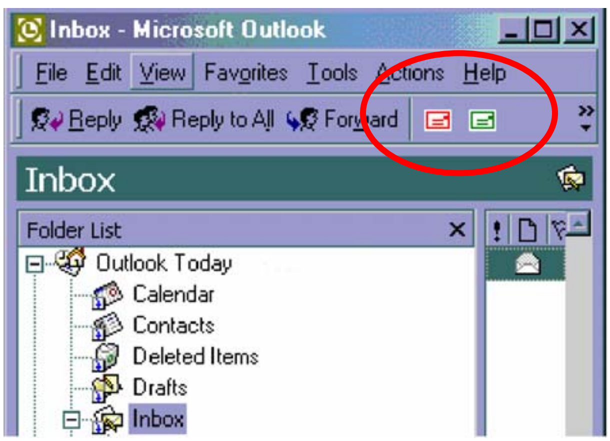
Using the Spam firewall and Outlook to identify what is and isn't spam

Once installed, the Plug-in is available to the user through the toolbar inside MS Outlook.

Two icons are provided that perform the necessary classification functionality - A red envelope to classify messages as spam, and a green envelope to classify messages as not-spam.

To use the plug-in, select one or more items from the message window and click on the spam/not-spam icon to submit the messages.

For convenience, the toolbar icons are also provided when a mail message is opened in a new window for viewing. If desired, the message can be classified immediately from that window.



Outlook General

How to change your view in Outlook

1. With Outlook open, select the area that you would like to change your view. I.E., Mail. Calendar, Contacts, etc.
2. Click View→Arrange By→Current View→Customize Current View
3. Click the Fields button – This will allow you to define what columns are shown in your detail view. You can use the Add and Remove buttons to customize the columns. Use the Move Up and Move Down buttons to change the order of the columns.
4. Click the "Group By" button – This button will allow you to create logical groups. Use the "Group item by" to use criteria for grouping your view. This is useful when you want your email grouped by the sender name/email address.
5. Click the "Sort" button – this button will allow you to determine the sort order of your messages.
6. Filter – Filtering is used to hide certain messages or message types from your active view. For instance, you could setup a filter to only show unread messages in your Inbox. Once a message is read you will not longer see it, until the filter is removed. Be cautious when setting filters.
7. After you have defined your custom view, click "OK"

Creating and using Rules

Create Outlook Rule:

1. With Outlook open, select Tools→Rules and Alerts
2. Click the "New Rule" button
3. Select whether you would like to sue a rule template or create a rule from scratch. Microsoft has built-in templates to handle most basic needs for rules.
4. Select the template you would like to use.
5. In Step 2: click the link "people and distribution list"
6. Select the person or persons you would like this rule to apply to.
7. Select the link "specified"
8. Select the folder that you would like to have the message moved to that meets the rule criteria
9. Click "Next"
10. The conditions window will appear: here you have the option of selecting additional criteria or conditions for the rule to meet in order for it to take effect.
11. Once all your conditions have been selected, click "Next"
12. The actions window will appear to allow you to either change the original action or add additional actions for this rule to take.
13. After you have completed your actions, click "Next"
14. Select any exceptions to the rule that need to be applied
15. Click "Next"

16. Type a name for this rule. On this screen you have two additional options: run this rule now and turn on this rule. By default the rule will be turned on automatically. If you want the rule to be run once it is created then select “Run this rule now on messages already in “Inbox” and it will process messages that have already been received.
17. Click “Finish” and you will see your new rule appear on the Email Rules tab.

To remove a rule:

1. With Outlook open, go to Tools→Rules and Alerts
2. Highlight the rule that you would like removed
3. Click the black “X Delete” button at the top. This will remove the rule.

Creating and using Favorites

When you add a folder to Favorite Folders in the Mail pane, in the Navigation Pane, the folder stays in its original location, and Favorite Folders provides quick and easy access to the folder. Only mail folders can be added to Favorite Folders.

Right-click the folder you want to add, and then on the shortcut menu, click Add to Favorite Folders.

Repeat this for each folder that you want to add. Folders must be added individually to Favorite Folders.

Archiving

How to archive

1. With Outlook open, click Tools→Options
2. Click the “Other” tab
3. Select “AutoArchive”
4. Define how often you would like the AutoArchive to run. 30-days is standard
5. Select Archive or Delete old items
   a. Clean out items older than: This is used to define how long you want to keep items in your active Outlook. Typical time frame is 3 months.
6. Move old items to: This defines the location where your archive file is stored. It is recommended that you store this on your home drive so that your archive file will get backed up regularly.
7. Click the browse button and select the location to store your archive file.
8. Click “OK”
9. Click “OK”
10. We have just defined the default settings for the AutoArchive function. Now we can individually turn on the AutoArchive for folders and subfolders in out Inbox. Do not forget to archive your deleted and sent items as well.
11. Click the Mail link on the navigation pane

12. Right-click the Inbox
13. Select properties
14. Click the "AutoArchive" tab
15. Select "Archive items in this folder using the default settings" – this will setup the Inbox to AutoArchive based on the parameters we defined in step 5.
16. You can repeat step 15 for any other folders in your Inbox, Sent Items or Deleted Items folders.
17. Once you have completed the steps, click File→Archive
18. Click "OK" and this will run a manual archive and alert you to any errors.

***WARNING:**
If you have a large mailbox or have never archived this process could take some time. Be patient and allow the process to complete before closing Outlook.

To view archived messages:

1. With Outlook open, select Mail in the navigation pane
2. Below your mailbox you should see a folder(s) by the name "Archive Folder"
3. click the "+" sign to expand the Archive Folder
4. This folder will contact any emails that have been archived from your Outlook.

***NOTE:**
If you have a laptop and you store your archive file on your network home drive you will not be able to view your archive file when you are out of the office.

Email

Saving email to a folder outside of Outlook

1. With Outlook open, select Mail from the navigation pane
2. Highlight the email you would like to save
3. Open the location in Windows Explorer where you would like to save the email
4. Drag and Drop the email from Outlook to the location where you want it saved. When you do this process it does not remove the email from Outlook. If the email has an attachment, the attachment is also saved with the email.

Knowing and Using the Address books

There are different address books available in Outlook. They are:

Global Address List
The Global Address List contains the names and e-mail addresses of everyone in your organization. The Microsoft Exchange Server administrator creates and maintains this address book. It can also contain global distribution lists and public folder e-mail addresses. Subsets of the Global Address List are displayed in the Address Book when you choose an entry under All Address Lists on the Show names from the list. You can download the Global Address List for use offline.

Note:
When using Microsoft Office Outlook 2003 with Cached Exchange Mode, the Offline Address Book is downloaded by default and updated once every 24 hours. This is applicable to remote and hosted site.

Outlook Address Book/Contacts
The Outlook Address Book is created automatically and contains the contacts in your Contacts folder that have a contact entry in the E-mail or Fax boxes. These contacts display in the Address Book dialog box when you click Contacts in the Show names from the list. The Outlook Address Book is available offline.

If you create additional contact folders, you can set the properties on each folder to include the contacts as part of the Outlook Address Book.

To open the **Address Book** dialog box, do any of the following:

- On the **Standard** toolbar, click **Address Book icon -** .
- In a new message, click **To**, **Cc**, or **Bcc**.
- On the **Tools** menu, click **Address Book**.

Sort your Inbox by using multiple columns

1. Click the column heading of your first sorting criterion.
2. Hold down the SHIFT key and click the column heading of your next sorting criterion.
3. You can continue to sort by additional columns, with each additional criterion sorting within the earlier criterion.

How to group and ungroup items

You can have Microsoft Outlook automatically apply grouping as part of a standard arrangement, or you can manually group items to create your own grouping.

Automatically group or ungroup items

- To quickly add or remove grouping in an arrangement, on the View menu, point to Arrange By, and then click Show in Groups.

Manually group or ungroup items

Group items

1. On the View menu, point to Arrange By, and then click Custom.
2. Click Group By.
3. Clear the Automatically group according to arrangement check box.
4. In the Group items by box, click a field to group by.
5. If the field you want isn't in the Group items by box, click a different field set in the Select available fields from box.
6. Click Ascending or Descending for the sort order of the group headings.
7. To display the field you are grouping items by, select the Show field in view check box.
8. To group by subgroups, click a field in the Then by box.
9. In the Expand/collapse defaults list, click the default for how you want groups to display in the view.
10. After closing the dialog box, display or hide items in a group by clicking Expand or Collapse.

Ungroup items

1. On the View menu, point to Arrange By, and then click Custom.
2. Click Group By.

In the Group items by box, click (none).

Calendar

Meeting Requests

1. How to create a meeting request:
2. With Outlook open select Calendar
3. Select the day that you would like to have the meeting
4. Click the "New" button in the top left corner
5. The new appointment window will appear. Fill in the appropriate information:
    a) Subject
    b) Location – You can just type your meeting location in this field if there is not already a location listed in the drop down
    c) Set the Start and End time and any reminders you want set for this appointment
    d) Details – This area is to contain detailed information of the appointment
6. Click the Scheduling Tab – this tab will allow you to view calendars of other users in your organization
7. Click the line that says "Click here to add a name" and type in the name of the person you wish to invite to the meeting. Once the persons name is underlined you will have the ability to review your calendar and see if their calendar is open for your requested meeting time.
8. You can add multiple participants using Step 6.
9. If you need to invite an attendee that is not part of your organization, go back to the Appointment tab and on the "To" line either type in the email address or select the email address from your address book.
10. When you are finished click "Send"

***You can add an attachment to a meeting request. Click the paperclip icon on the top tool bar with the meeting request open. You can use this to attach an agenda, reports or any other information that may be pertinent to the meeting you are requesting.**

How to share your Calendar with another user

1. With Outlook open select Calendar
2. Click "Share My Calendar" in the left hand toolbar
3. Click the "Add" button
4. From the Add Users dialogue box select the person, persons or group that you wish to share your Calendar
5. Click the "Add" button
6. Click "OK"
7. Select the person, persons or group you just added by highlighting their name.

8. Click the drop down arrow next to Permission Level: and select the proper permissions:
    a. Reviewer – Allows a person to read your calendar, but not make any changes
    b. Author – Allows a person to read and add items to your Calendar, but this person can not edit any appointments that you have set.
    c. Owner – Allows a user to have full control of your Calendar. They can add, change, edit or delete any appointment regardless of who created them.
9. Click “OK” and now your Calendar is shared.

How to open a shared Calendar

1. With Outlook open select Calendar
2. Click “Open a Shared Calendar”
3. Either type the name of the person or click the name button and select the person from the list that you want to view.
4. Click “OK”
5. On the left-hand tool bar you will see a section called “Other Calendars”, to view a Calendar put a check mark beside the name of the person that you want to view.
6. By selecting the name this will allow you to view calendars side by side or one at a time. To stop viewing a Calendar just un-check the persons name that you wish to stop viewing.

How to add a Public Calendar to your view

1. With Outlook open select the folder list view.
2. Expand the public folders
3. After you have found the Calendar you want to add to your view, right-click the Calendar and select “Add to Favorites”
4. Click “Add”
5. To view the Calendar, select Calendar from the left-hand tool bar
6. Put a check by the public calendar that you would like to view

Contacts

Importing a Contact List

1. Outlook will allow you to import from another Outlook file (.pst), Excel, .CSV, Access and various other applications. The primary method you should use should be .csv files or .pst files. These are the cleanest to work with.
2. With Outlook open, click File→Import and Export
3. Select "Import from another program or file"
4. Select the file type from the list, for this example we are going to use a .csv file. So select "Comma Seperated Values (Windows)"
5. Under "File to import:" click the browse button
6. Browse to your .csv file and select it.
7. **IMPORTANT OPTION**: Please review the Options section carefully as this determines how the data will be handled. Select the appropriate action for duplicate data.
8. Click "Next"
9. Select the Contact List that you would like the file imported into. If you want to create a new contact list, the contact list should be created prior to starting the import exercise.
10. After you have selected your contact list, click "Next"
11. Click the "Map Custom Fields" button. This screen allows you to map your .csv file fields to Outlook contact fields to ensure the data gets put into the proper locations.
12. To map values to a field, simply drag and drop the value to the field name. When a mapping is created, review the "Mapped From" column to see what values are mapped to each field in Outlook.
13. Once you have completed your field mappings click "OK"
14. Click Finish and the import process will take place. If there are any errors they will be shown on the screen. Once the import is complete immediately review the contact list to ensure the data is accurate.

***NOTE: When using import files you must have column names included with your file. This will allow you to map your fields accurately when importing into Outlook.**

Exporting a Contact list

Note: You can not export directly from a Public Folder contact list. You must first create a local Contact list and export from there.

1. With Outlook open select Contacts
2. From you're My Contacts list select the list you wish to export by highlighting it.
3. Click File→Import and Export
4. Select "Export to a file"
5. Your file type selection will be dependent on the purpose for the import. If you are sharing Contacts with another Outlook user then select "Personal Folder File (.pst)". If you are using your contact list to populate another database or Excel spread sheet then select "Comma Separated Values (Windows)".
6. For this example we are going to select "Person Folder File (.pst)"
7. Click "Next"
8. Select the contact list you wish to export, if it is not selected already. If this list has subfolders that you wish to be included in the export, click the checkbox next to "Include Subfolders"
9. Click "Next"
10. Under the "Save exported file as:", select a location to save the export file. Click browse to find the location and type a name for the export file.
11. Click Finish
12. This step is only necessary if you select "Personal Folder File" as the export file type. Click "OK"
13. You can now share this file with other outlook users and they will be able to import the file directly into their contact list.

Mail Merge

How to create a mail merge document:

1. With Outlook open select Contacts
2. Select the Contact List that you would like to create a mail merge document
3. Click Tools→Mail Merge
4. When the Mail Merge Contacts window opens you will have several options:
    a. Contacts – select whether you want to merge the complete list or just the selected contacts that you have highlighted
    b. Fields to Merge – select if you want the ability to use all Contact data fields or just the fields in your current view
    c. Document File – If you have an existing letter or template you can click the "Browse" to select your existing letter. If this is a new letter then leave the default "New Document".
    d. Contact Data File – This will create a permanent file of the merge data fields. This is not necessary you will have the ability to save your merged documents after they are created.
    e. Merge Options
        i. Document Type – this allows you to specify the type of document you are creating from a letter, labels, envelopes or catalog
        ii. Merge to – This allows you to specify what will happen with the create documents. If you select new document then when the merge is created Word will open and you will see all of the documents on your screen. If printer is selected then when the documents are created they will immediately be printed. If email is selected, emails will be generated immediately from the merge information.
5. Click "OK"
6. Now Word will open with your document. We now need to insert our mail merge fields.
7. Select the location on our document to insert the first field and then select "Insert Merge Fields"
8. Select "Address Fields"
9. Select the field you would like to insert
10. Click "Add"
11. Repeat steps 7-10 for each Outlook merge field you would like inserted
12. Once all of the fields have been inserted, click the "Merge to new document" button
13. Select "All"
14. Click "OK"
15. You will now see your merged documents on your screen. You may now print them or save them for future retrieval.

How to share your Contacts with another user

This feature requires you to be using a Microsoft Exchange Server e-mail account.

1. In Contacts, in the Navigation Pane, click Share My Contacts.

   Note Share My Contacts does not appear unless you are using an Exchange Server e-mail account.

2. Do one of the following:

   To Allow anyone to access your Contacts

   a) In the Name box, click Default.
   b) Under Permissions, in the Permission Level list, click the permission level that you want.

   Specify the people who can access your Contacts

   a) Click Add.
   b) In the Add Users dialog box, in the Type Name or Select from List box, enter the name of the person whom you want to grant sharing permissions to.
   c) Under Add Users, click Add, and then click OK.
   d) In the Name box, click the name of the person you just added.
   e) Under Permissions, in the Permission Level list, click the permission level that you want.

Important If you select the Private check box on a Contact item in Microsoft Office Outlook 2003, do not grant Read permission to your Contacts folder to anyone whom you do not want to see private items. A person who is granted Read permission to access your folders could use programmatic methods or other e-mail applications to view details in a private item.

How to open another person's Contacts

1. In Contacts, click Open Shared Contacts.
2. To select another person's name from the address book, click Name or type the name in the Name box.

Click OK.

Tasks

Turn a message into a task item

1. With Outlook open, select Mail in the navigation pane
2. Highlight a message
3. Drag and Drop the message from the Inbox to Tasks in the navigation pane.
4. The new Task window will appear. Fill in the appropriate information:
   a. Due date
   b. Status
   c. Start Date – if necessary
   d. Reminder – if you would like to have Outlook prompt you with a reminder you can select the reminder option.
5. Click Save and Close

Assign a Task

1. With Outlook open, select Tasks in the navigation pane
2. Click the "New" task button or double-click in the Tasks pane
3. Fill in the appropriate information:
   a. Subject
   b. Due Date
   c. Start Date
   d. Status
   e. Details of the task in the notes area
4. Click the "Assign Task" button
5. Type in the persons name or email address
6. Ensure that "Keep an updated copy of this task on my task list" and "Send me a status report when this task is complete". These options will allow you to track any task you have assigned internally. If a task is assigned to an outside party you will not be able to track the task status.
7. Click "Send"

***NOTE: You can add attachments to Tasks.**

Adding Task Reminder

1. Open the task you want to set or clear a reminder for.
2. Select or clear the Reminder check box. If you are setting a reminder, you can also enter a date and time.

If you set a reminder but don't set a reminder time, the default reminder time is used. To set the default reminder time, on the Tools menu, click Options. In the Reminder time box, select a time.

Customizing Outlook

Different formats of email

Regardless of the e-mail editor you use, Microsoft Outlook can send and receive messages in HTML, plain text, and Outlook Rich Text formats.

HTML (default) format
When you create a message in Outlook, the default format is HTML. This format supports text formatting, numbering, bullets, alignment, horizontal lines, pictures (including backgrounds), HTML styles, stationery, signatures, and linking to Web pages. Because the most popular e-mail programs use HTML, it is the recommended format for Internet mail. It is also the recommended format if you send most of your messages within a company that uses Microsoft Exchange Server.

Plain text and Outlook Rich Text formats
Plain text format
Plain text format is one that all e-mail programs understand. You can set Outlook to open messages you receive in plain text format only. However, plain text doesn't support bold, italic, colored fonts, or other text formatting. It also doesn't support pictures displayed directly in the message body (although you can include them as attachments).

Rich Text format
Outlook Rich Text Format (RTF) is a Microsoft format that only the following e-mail programs understand: Microsoft Exchange Client versions 5.0 and 4.0, Microsoft Office Outlook 2003, Outlook 2002, Outlook 2000, Outlook 98, and Outlook 97. You can use RTF when sending messages within a company that uses Microsoft Exchange Server; however, it is recommended that you use HTML. RTF supports text formatting, including bullets, alignment, and linked objects (linked object: An object that is created in a source file and inserted into a destination file, while maintaining a connection between the two files. The linked object in the destination file can be updated when the source file is updated.). Outlook automatically converts RTF messages to HTML when you send a message to an Internet recipient, so message formatting is maintained and attachments will be received properly. Outlook also automatically formats meeting and task requests and messages with voting buttons so these items can be properly sent intact across the Internet to other Outlook users, regardless of the default format you have set.

Changing message formats

Change the default message format for all new messages

1. On the Tools menu, click Options
2. Click the Mail Format tab
3. In the Compose in this message format list, click the format you want

Specify the default message format for one new message you will create

1. From the main Microsoft Outlook window, on the Actions menu, point to New Mail Message Using, and then click the format you want to use.

Change the format of a message you have received or already created

Do one of the following:

When reading a Rich Text Format message

1. With the message open, on the Format menu, click the format you want to use (Plain Text or HTML).

Note:
If you use Word to read Rich Text e-mail messages, you cannot change the format of the message.

When reading a plain text or HTML message

1. With the message open, on the Edit menu, click Edit Message.
2. On the Format menu, click the format you want to use (Plain Text, HTML, or Rich Text).

Note:
If Word is not your e-mail editor, you can convert HTML or RTF to plain text, and you can convert plain text to RTF or HTML. However, you cannot convert HTML to RTF or RTF to HTML.

When composing a message with Word as your e-mail editor

1. With the message open, on the E-mail toolbar, click the format you want to use from the drop-down list (Plain Text, HTML, or Rich Text).

When composing a message if Word is not your e-mail editor

1. With the message open, on the Format menu, click the format you want to use (HTML, Rich Text or Plain Text).

Note:
If Word is not your e-mail editor, you can convert HTML or RTF to plain text, and you can convert plain text to RTF or HTML. However, you cannot convert HTML to RTF or RTF to HTML.

Change the format for all messages sent to a particular Internet recipient

1. Open the contact card for the person.
2. In the E-mail box, double-click the contact's e-mail address.
3. In the Internet Format list, select the format you want to use for messages to this recipient.

Note:
You can only change the format for all messages sent to a contact with an SMTP e-mail address.

Adding a signature

1. From the main Microsoft Outlook window, on the Tools menu, click Options, and then click the Mail Format tab.
2. In the Compose in this message format list, click the message format that you want to use the signature with.
3. Under Signature, click Signatures, and then click New.
4. In the Enter a name for your new signature box, enter a name.
5. Under Choose how to create your signature, select the option you want.
6. Click Next.
7. In the Signature text box, type the text you want to include in the signature.
8. You can also paste text to this box from another document.
9. To change the paragraph or font format, select the text, click Font or Paragraph, and then select the options you want. These options are not available if you use plain text as your message format.
10. To add an electronic business card — vCard — to the signature, under vCard options, select a vCard from the list, or click New vCard from Contact.
11. Click Finish when you are done editing the new signature.
12. Once you've created a signature, you can insert a signature in a message.

Creating an Away message

1. In Mail, on the Tools menu, click Out of Office Assistant.
2. Click I am currently Out of the Office.
3. In the AutoReply only once to each sender with the following text box, type the message that you want to send to others while you are out.
4. If you want, create rules to manage your incoming mail.

Note:
This feature requires you to use a Microsoft Exchange Server e-mail account.

Change default email editor

Do one of the following:

Turn Word on or off as your default e-mail editor for all new messages

1. From the main Microsoft Outlook window, click the **Tools** menu, click **Options**, and then click the **Mail Format** tab.
2. Select or clear the **Use Microsoft Word to edit e-mail messages** check box.

Turn Word on as your e-mail editor for one new message

On the **Actions** menu, point to **New Mail Message Using**, and then click **Microsoft Word (*message format*)**.

Turn Word on for viewing all Rich Text formatted messages

1. From the main Microsoft Outlook window, click the **Tools** menu, click **Options**, and then click the **Mail Format** tab.
2. Select the **Use Microsoft Word to read Rich Text e-mail messages** box.

You may want to set this option if you often receive the message "This message contains formatting that is best viewed with Microsoft Word. Click here to display in Word."

Calendar time increments

By default, the Microsoft Outlook calendar grid appears with a time scale of 30 minutes. You can increase or decrease this scale, depending upon what you want to see.

1. In **Calendar**, right-click on the calendar grid.
2. Click **Other Settings**.
3. Under **Day**, in the **Time scale** list, click the grid interval for the calendar.