

OUTLOOK 2000: Getting Started

MAIN ELEMENTS OF OUTLOOK

Outlook Bar and the Information Viewer (Preview Pane is optional: View Menu/Preview Pane)

OUTLOOK BAR: Outlook Shortcuts and My Shortcuts – OUTLOOK FOLDERS; Other Shortcuts – FILE FOLDERS

- Outlook Shortcuts: shortcuts to general-purpose Outlook folders (Outlook Today, inbox, calendar, tasks, contacts, deleted items, etc.)
- My Shortcuts: shortcuts to folders for managing email items (drafts, outbox, sent items, etc.)
- Other Shortcuts: shortcuts to file folders on your local computer or network (My Computer, My Documents, Favorites)

OUTLOOK SHORTCUTS

- **OUTLOOK TODAY FOLDER:** shows Calendar, Tasks, and Messages
 - To open one of these subfolders, click on the heading of one of the three columns of info
 - To have Outlook Today Folder show up as your “homepage” when opening up Outlook:
 - Click on Outlook Today Folder icon,
 - Click where it says “Customize Outlook Today ...” on the right side of the black bar



- Insert the check mark as in the following graphic below.

Startup



When starting, go directly to Outlook Today

Seeing Folder List

Go to View Menu/Folder list. There are other ways to open this list, such as clicking on the Folder button that has white letters and a white down arrow.

Viewing the Advanced Toolbar

Go to the View Menu/Toolbars and select Advanced Toolbar. This will give you quick ways to do things in the Inbox, Calendar, Tasks folders.

USING OUTLOOK EMAIL

Display or hide the preview pane (a good way to prevent getting a virus by opening infected mail)

- On the **View** menu, click **Preview Pane**.

Preview the first three lines of messages that you have already read

1. Click **Inbox**.

2. To display or hide the first three lines of a message under the message, click the **View** menu, and then click **AutoPreview**.

Turn on or off automatic emptying of the Deleted Items folder

1. On the **Tools** menu, click **Options**, and then click the **Other** tab.
2. Select or clear the **Empty the Deleted Items folder upon exiting** check box.

Note To be notified before you empty the Deleted Items folder, click the **Tools** menu, click **Options**; click the **Other** tab, click **Advanced Options**, and then select or clear the **Warn before permanently deleting items** check box.

Send a message

- Click on the New button on the Standard Toolbar or go to the Actions Menu and select New Mail Message, or Ctrl + N.

Address a message

- To quickly address a message, type the names of the recipients in the **To, Cc, and Bcc boxes** of a message. Separate names with a semicolon (;). [Click on the To button to get to Cc and Bcc.]

Global Addresses (a list of email addresses for USM faculty)

When you choose to send new mail and you want to send email to a faculty member, you can get to the Global Addresses by going to the address book. The Global Addresses will come up by default, as opposed to your contacts from the Outlook Address Book.

- To get to the Address book, you can do any of the following: click on the TO: button in the new mail window OR click on the Address Book icon button in the toolbar OR go to Tools Menu OR Ctrl + Shift + B
- To access the LS, MS, or US faculty list (or the Contacts that you have added to the Outlook Address Book)-- click on the down arrow in the Select Names window.

Create a personal distribution list (an email address list, with a specific descriptive title, that includes assigned members)

1. On the **File** menu, point to **New**, and then click **Distribution List**.
2. In the **Name** box, type a name for this list of people.

The distribution list is saved in your Contacts folder by the name you give it.

3. Click **Select Members**. In the **Show names from the** list, click the address book that contains the e-mail addresses you want in your distribution list.
4. In the **Type name or select from list** box, type a name you want to include. In the list below, select the name, and then click **Add**. How to select multiple items.
5. If you want to add a longer description of the distribution list, click the **Notes** tab, and then type the text.
6. Click **Save and Close**.
7. Send an email using the distribution list:
 - Go to New.
 - Click on the TO: button.
 - At the top of the next window where it says **Show names from the:** --- click the down arrow to **Contacts**.
 - Select Distribution List name and click the **To:** button.

Outlook Address Book / Contacts (a list of email address that you create, outside of USM faculty)

Create contacts

A contact is a person or organization you correspond with. You can store information about contacts such as job titles, phone numbers, addresses, e-mail addresses, Internet e-mail addresses, and notes. This Contact address will be stored in your Outlook Address Book.

Create a contact from an e-mail message you receive

1. Open the e-mail message that contains the name you want to add to your contact list.
2. In the **From** field, right-click the name you want to make into a contact, and then click **Add to Contacts** on the shortcut menu.

Create a contact with new information

1. Click on the Contacts icon in the Outlook Shortcuts window. On the **File** menu, point to **New**, and then click **Contact**. (Once in the Contacts window, you can also click the New button or Ctrl + N.)
2. In the **Full Name** box, type a name for the contact.
3. Enter the information you want to include for the contact. (Make sure that you include the email address.)
4. Click Save and Close.

USING CALENDAR

Change the amount of time displayed in a Calendar

To view items	Do this
In one day	Click Day
In seven days	Click Week
In five days, Monday through Friday	Click Work Week
In a month	Click Month

Schedule an appointment

1. On the **File** menu, point to **New**, and then click **Appointment**.
2. In the **Subject** box, type a description.
3. In the **Location** box, enter the location.
4. Enter start and end times.

5. Select other options you want.
6. Click **Save and Close**

Tip In Calendar, you can also create an appointment by selecting a block of time, right-clicking, and then clicking **New Appointment** on the shortcut menu.

Set an appointment reminder

1. Open the appointment or appointment series if the appointment is recurring.
2. Select the **Reminder** check box, and then enter the amount of time before the appointment when you want the reminder to occur.

Open a Calendar item

Click the **Calendar** icon.

1. Click the item you want to open.
2. On the **File** menu, point to **Open**, and then click **Selected Items**.
3. If the item is a recurring item, click **Open this occurrence** or **Open the series**

Tip You can also double-click the item to open it.

Schedule a meeting

Click **Calendar**

1. On the **Actions** menu, click **Plan a Meeting**.
2. Invite attendees and resources ***
3. Click **AutoPick**, and then click an option.
4. Click **Make Meeting**.
5. In the **Subject** box, type a description.
6. If you did not schedule a room, enter the location in the **Location** box.
7. Select other options you want.
8. Click **Send**.

Tip To send agendas or meeting minutes, attach a file to your meeting

Invite attendees and resources to a meeting ***

1. Click **Calendar**
2. On the **Actions** menu, click **Plan a Meeting**.
3. Click **Invite Others**.
4. In the **Type name or select from list** box, enter the name of the person or resource you want at the meeting.

5. For each name entered, click **Required**, **Optional**, or **Resources**. (The **Required** and **Optional** attendees appear in the **To** box on the **Appointment** tab, and **Resources** appear in the **Location** box.)
6. Click **OK**, and then use the scroll bars to view the free/busy time for invitees.
7. Click a time when all invitees are available. You can use **AutoPick** to find the next available free time for all invitees.
8. Click **Make Meeting**.

Tips: You can quickly schedule a meeting with someone in your Contacts list. In Contacts, click the contact, click the **Actions** menu, and then click **New Meeting Request to Contact**.

Schedule a recurring meeting

1. Click **Calendar**
2. On the **Actions** menu, click **Plan a meeting**.
3. Invite attendees and resources ***
4. Click **AutoPick**, and then click an option.
5. Click **Make Meeting**.
6. In the **Subject** box, type a description.
7. If you did not schedule a room, enter the location in the **Location** box.
8. Select other options you want.
9. On the **Actions** menu, click **Recurrence**.
10. Select the recurrence pattern and range of recurrence options you want.
11. Click **OK**, and then click **Send**.

Use personal distribution lists in a meeting request

1. On the **File** menu, point to **New**, and then click **Meeting Request**.
2. In the **To** box, type the name of the personal distribution list.
3. Click the **Attendee Availability** tab.
4. Click the plus sign (+) next to the name of the personal distribution list to see the availability of individual members, or to remove them from the meeting request.

Create a meeting request from a contact

1. Select the contact, click the **Actions** menu, and then click **New Meeting Request to Contact**.
2. In the **Subject** box, type a description.
3. In the **Location** box, enter the location.
4. Enter start and end times.

5. Select other options you want.
6. Click **Send**.

USING TASKS

Create a task

(A task is a personal or work-related errand you want to track through completion. A task can occur once or repeatedly (a recurring task). A recurring task can repeat at regular intervals or repeat based on the date you mark the task complete.)

Create a task that occurs once

1. On the **File** menu, point to **New**, and then click **Task**.
2. In the **Subject** box, type a task name.
3. Select the options you want.
4. Click **Save and Close**.

Note To quickly add a task in the task list, click "**Click here to add a new task**", type a task name, and then press ENTER.

Create a task that recurs at regular intervals

1. On the **File** menu, point to **New**, and then click **Task**.
2. In the **Subject** box, type a task name.
3. Select the options you want.
4. On the **Actions** menu, click **Recurrence**.
5. Click the frequency (**Daily, Weekly, Monthly, Yearly**) at which the task recurs, and then select options for the frequency.

Do not click **Regenerate new task**, or the task will not recur at regular intervals.

6. If you want the task to start and end on specific dates, set start and end dates.
7. Click **OK**, and then click **Save and Close**.

Change the order of tasks

When tasks are not sorted or grouped, you can change the task order by moving individual tasks up or down in the task list. Moving individual tasks up or down in the task list is most useful when you only want to change the order of a few tasks—for example, to put them next to each other.

You can also sort the entire task list and then save the new order as the default. This procedure is useful when you want tasks arranged by the contents of a particular field—for example, to see tasks in order of priority or due date.

Move tasks up or down in the task list

1. Click **Tasks**.
2. On the **View** menu, point to **Current View**, and then click **Customize Current View**.
3. Click **Sort**, click **Clear All**, and then click **OK**.

4. Click **Group By**, click **Clear All**, and then click **OK**.
5. Drag a task up or down in the task list, using the guide to position the task.

Note You can also move tasks up or down in the TaskPad in Calendar if tasks are not sorted or grouped.

Assigning tasks to categories

A category is a keyword or phrase that helps you keep track of items so you can easily find, sort, filter, or group them. Use categories to keep track of different types of items that are related but stored in different folders. For example, you can keep track of all the meetings, contacts, and messages for the Northwinds project when you create a category named Northwinds Project and assign items to it.

Categories also give you a way to keep track of items without putting them in separate folders. For example, you can keep business and personal tasks in the same task list and use the Business and Personal categories to view the tasks separately.

Outlook supplies a list of categories you can assign items to, called the Master Category List. You can use this list as it is or add your own categories to it.

Based on how you work, you can:

- Assign items to a category already available in the Master Category List.
- Add a new category to the Master Category List and assign items to it.
- Create new categories in the Master Category List in advance and then assign items to them later.
- Assign items one at a time to categories as you create each item.

Create new categories for later use

1. On the **Edit** menu, click **Categories**.

If **Categories** isn't available, click any item, and then try again.
2. Click **Master Category List**.
3. In the **New category** box, type a name for the category.
4. Click **Add**.
5. To create more categories, repeat steps 3 and 4.
6. Click **OK**, and then click **OK** again.