



Microsoft Office
Outlook 2003

# Outlook 2003 – More Than Just Email

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## **Getting Started**

## **Overview of the Main Outlook Window**

Change which navigation buttons are shown, and in what order, through the Navigation Pane Options window.

Inbox - Microsoft Outlook				
Elle Edit View Go Iools Ad	tions Help	Type a question for help 🛛 🗧		
🔂 New 🔹 🎯 🆓 🗙 🙈 Beply	🙈 Reply to All 🦂 Forward 🕼 Find 🕼 Type (	a contact to find 🔄 🖉	Navigation Page Options	
🧐 🖉 pek 🎯 🗖 🗎 🛕 🖆	7 . 🙀 . Messages 💽 . 🚍 🚰	2	That gattern Faile options	N .
SnagIt 🛃 Window			Display buttons in this order	
Mail	Inbox	🔯	Mail	Move Up
Favorite Folders	Arranged By: Date	Oldest on top 🛛 🗠 📩	Calendar 🗹	
Inbox Linread Mail	🖃 Older		Contacts Tasks	Move Down
Control For Follow Up Control Sent Items	Cutlook 2003 - attachments open as read-only	5/4/2005 🧒 🗧		Reset
All Mail Folders	Olmstead, Nate     LookOut!	5/23/2005	Shortcuts	
Infected	🗉 Last Month			
Outbox	🙈 Kim, Daniel	7/1/2005 😽		K Cancel
Quarantine	IM UNKNOWN			
Coen in New Wind	Three Weeks Ago	211 4 1000E		
7 Items Navigation Pane C	Options All folders are up to	a date. O Connected •		

Open/Close the Reading Pane the toggle buttons on the toolbar or the View menu.





Show/Hide full menus or change how toolbars are docked (share one line or separate lines) through "Customize"



## **Setting Options**

Each tab in the Options window contains a variety of settings. Some tabs also contain access to additional settings and features.

The *Preferences* tab contains settings specific to the standard folders in an Outlook profile. Several settings can be found under Email Options.

Advanced E-mail Options

Options 🛛 🕅 🗵	E-mail Optiens	Save unserk bens in: 2005 20 RutoSave unserk every: 3 ninubes in folders other than the brbox, save replies with original message Save forwarded messages	
Preferences     Mail Setup     Mail Format     Spelling     Security     Other     Delegates       E-mail     Change the appearance of nessages and the way Marr SE Turched     Jank E-mail     E-mail Options       Calendar     Customers the appearance of the Calendar.     E-mail Options     E-mail Options       Calendar     Outromers the appearance of the Calendar.     E-mail Options     E-mail Options       Tasks     Outromers the appearance of tasks.     Reminder time:     8:00 AMT     Task Options       Contacts     Contact Options     Journal Options     Notes     Contact Options       Contacts     Contact Options     Journal Options     Notes     Notes       Contact     Options     Contact Options     Notes     Notes	Message handling  After moving or deleting an open Rem. Frank to the Infoor  Cose original message on reply or forward  Some copies of messages in Sont Zenes folder  Actionationally same unseen Reposage  Remove exits a tree breaks particulate in ressages  Include original message Include original message text Weater replying to a message Include original message I		age has processing

Email accounts can be modified from the *Mail Setup* tab. You can open additional mailboxes, as well as create and manage pst files for offline storage.



Default formatting (background stationery, fonts, and signatures) for outgoing messages is controlled from the *Mail Format* tab, i.e..

1. *Fonts...* allows you to change the font face and color for all new messages, as well as replies and forwards.





2. *Stationery Picker...* offers stationery to choose for your outgoing messages, or you can create an entirely new one.

Stationery Picker		Edit Stationery - [Untitled]
Stationery  Stationery  Ctrue Punch  Ctrue Punch		Message font Choose the font and style you would like to use to compose messages with this stationery: 10 pt. Ariel Chance font
Clear Day     Currency     Goter     Goter	Leter Rev Stationery      Leter a name for your new stationery:      Inter a name for your new stationeryo	Background Stationery can have either a background picture or a sold background color. Select the background for this stationery:
Preview:	2. Choose how to create your stationery:	O Picture:     O Color:     O Color:
	O Use this existing stationery as a template:	O Do not include a background in this stationery Preview:
	O Use this file as a template:	
Get More Stationery OK Cancel	Next > Cancel	OK Cancel

3. Signatures... Create a signature to include in new messages and/or replies and forwards.

Choosing Advanced Edit on the Edit Signature window will open an editor based on the default format you have set for your outgoing messages. For example, if you have Word selected as you editor, this will open

Word; if you are sending mail in HTML format, this will open your default web editor (FrontPage, Netscape, etc.)

Create Signature		
Sanature:		Edit Signature - [Untitled]
Edt Remove	Create New Signature	This text will be included in outgoing mail messages:
New	I. Enter a name for your new signature:      Inter a name for your	I,
Preview:	2. Choose how to create your signature: () Start with a blank signature	<u>.</u>
	O Use this existing signature as a template:	Fort Paragraph Clear Advanced Edt
	O Use this file as a template:	Attach this business card (vCard) to this signature:           Attach this business card (vCard) to this signature:
OK Cancel	] Next > Cancel	Finish Cancel

The *Spelling* tab sets Outlook to check your spelling before your message is sent. This feature uses Word's dictionary – if the dictionary is not installed in MS Word, you will receive an error message.

Various security settings, as well as digital Ids, are set from the *Security* tab.



Through *Delegates*, you can give another Exchange user permissions to one or more of your account folders (i.e. Calendar, Contacts, Inbox). After selecting a user from the Global Address List (be sure the name appears in the Add Users box on the right), you can set the level of permission for each individual component of your account.

Delegates	Type Name or Select from List:	Business School	~	De	legate Permis	sions: UMBSSoftHelp	
Delegates can send tens on your behalf. To grant permission to     send on-behalf of privileges, got to the Properties dialog box for each     send on-behalf of privileges, got to the Premissions tab.     Add.     Renove     Premissions.     Sond exenting requests and responses only to my delegates, not to     me	Name URES-AurmEmal URES-International URES-Internat	Business Phone	Office		his delegate has Calendar Deleg Tasks Inbox Contacts Notes	the following permissions Editor (can read, create, and modify iter Bonemer (can read terms) Author (can read terms) Author (can read terms) Editor (can read, create, and modify ter None None None None None None None None	ns) k to me
OK Canol Apply	Adduced  Advanced		Cancel		Automatically se Delegate can se	nd a message to delegate summanising these ency private Rems	e permissions

The *Other* tab gives access to settings such as working with the Reading Pane, reminder notifications and the startup folder. AutoArchive settings are also accessed on this tab.

	Advanced Options 🔀	
	General settings	
	Startup in this folder: Inbox Browse	
	Warn before permanently deleting items	
	When selecting text, automatically select entire word	
Options 🛛 🤶 🔀	Provide feedback with sound	
	Show Paste Options buttons	
Preferences Mail Setup Mail Format Spelling Security Other Delegates	✓ Use Unicode Message Format when saving messages	
General	Enable logging (troubleshooting)	
Empty the Deleted Items folder upon exiting	Allow script in shared folders	
Make Callock the default program for E-mail Contacts and	Allow script in Public Folders	
Calendar.	Annewance rations	
Navigation Pane Options Advanced Options	Date Maximutery Earth Rick Tahoma	
AutoArchive	When viewing Notes, show time and date	
Manages mailbox size by deleting old items or moving them to an	Tark weeking recess, show chie and date	
archive file and by deleting expired items.	lask working hours per day: 0	
AutoArchive	Task working hours per week: 40	
Dearling Dane	Reminder Ontinos	
Customize actions for the Dandon Dana		
Custome option of the Resard Pare.	Custom Forms COM Add-Ins	
Restro Pare	Service Options	
	OK Covel	
Person Names		
Enable the Person Names Smart Tag		
Display Messenger Status in the From field	Reading Pane	X
	Reading Pane options	
	Mark items as read when viewed in the Reading	Pane
OK Cancel Acoly	Wait 5 seconds before marking item	as read
	Mark item as read when selection changes	
	Single key reading using space bar	
	ок	Cancel

## Working with Email

## Creating a New Message

There are many ways to open a new message:

- Ctrl+N or Double click any empty space in any message folder (i.e. Inbox)
- Ctrl+Shift+M from any folder
- From menu: File... New... Message
- "New" button (use dropdown if in a non-message folder)



#### **Basic Mail Options**

Open the From and Bcc fields from the View menu. These will remain available for all new messages until you close them from the View menu.

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Send		Previous	•	s Ad	obe PDF   🛄   📍 🔱   🤻
Arial		Ne <u>s</u> t	•	в	1 1 三 三 三 三
-		Text Size			
From		Encoding	,		
То"	F	Message Head	er		
Se	1	From Fjeld	N	1	
Bcc	~	Bcc Field	.4	1	
Subject:	-	Options			
		Toolbars			

Change the message format for the current message from the Format menu. This will not change your default format (go through Tools... Options... Mail Format... to change the default for all new messages). To change to Rich Text format from HTML, you will first need to change to Plain Text, click OK when warned that you will lose all formatting, then change to Rich Text.

Through the Insert menu, you can attach either files from your computer or network folders or Outlook items, such as appointments and contacts.

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- Send 🔄 🛃 🎉 🕯	2 tyle	🔸 🦞 📄 Options
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From	Background	
To <sub>a</sub>	Encoding	
<u>ç</u> c	Plain Iext	
Bcc		
Subject:	Send Pictures from the Intern	vet

Ele Edit View	Insert Format Io	ols Actions Help
🖃 Send   🛃 🖂	Ele	PDE [00] ? 4
Arial	Rgm V	
	Signature	•
From	Horizontal Line	
То"	Picture	
<u></u>	👷 Hyperlink	
Bcc	Remove Hyperlini	k 🔤

#### **Send Options**

There are a number of options that can be set for an outgoing message.

#### Delivery/Read Receipt

You can request a receipt for delivery of a message and/or notification that a message has been read. Be aware that these settings are only reliable if the recipient is also on an exchange server. Otherwise, you may only get a delivery receipt because the message reached their server (but not necessarily their mailbox) and a read receipt may never come through.

#### Send Replies

You can have replies sent to a different email account than your own.

#### Delivery/Expiration Date

Rather than leaving yourself a reminder to send an email message on a later date, set a delayed delivery. Likewise, you can set an expiration date so that the message will selfdelete once the purpose of the message has expired (for example, if you email a question about a project due this Friday, you are not going to need an answer next Monday, so why not have the message expire just after the deadline).



#### Setting Priority and Flags

You can easily set High and Low priority to emails; no priority selected means Normal priority.

Message flags are a convenient way to flag necessary action on a message. You can also set a due date for the action. These settings will be seen as a banner at the top of the email.



## **Replies, Forwards and Recalling messages**

The difference between Reply and Forward is that attachments are stripped from replies. To keep the attachment, be sure to use Forward.

To Recall or Resend a message, first open the message, then go to the Actions menu in the message window.

When recalling a message, you can ask to be notified if the recall was successful. You can also choose between deleting the message or replacing the message (this can be very useful for those times you forgot to send the attachment!). Be aware that you will not be able to recall messages sent to recipients outside of the Exchange server.



When resending a message, you can add text if desired. Be sure to click Send (Resend from the Actions menu does not automatically send the message).

### **Sorting Messages and Folder Views**

#### **Reading Pane vs. AutoPreview**

You can view the message through the Preview Pane without actually opening the message itself. AutoPreview will list the first three lines of the message under the message information.





#### Sorting messages

Sort messages by clicking on the item of the field bar that you wish to sort. A small triangle appears in the field that is sorted: pointing down for descending and pointing up for ascending. The default is to sort by date (descending). If you sort by another field, such as From, the message will also be sorted by date (however, the triangle will only be in the primary sort field). In Outlook 2003, you can also choose to have messages grouped.



#### **Field Chooser**

The easiest way to find Field Chooser is by rightclicking the field bar in the window. You can then select the field you want to add and drag it and drop it on the field bar.



#### **Customize View**

Custom View Organize

You can customize how you view your message box through Arrange By under the View menu. There are a number of preset options, such as by date or sender, which will group and/or sort items in your mailbox. Or you can choose an available filter under Current View (turn off the filter by choosing Messages).

You can also create your own views by choosing Define Views and then setting criteria. Give your view a name and specify if you want it available only to the current folder or all folders.

🧿 Inbox - Micro	soft Outlook							
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Uhread	Reminders Window		Şize					
C. For Fol	Refresh FS		Subject	npor	tant Food Service Announcements!			
Sent Ib	Toohare		Туре	05-06 Tuition				
All Mail Folder	Dowars Par		Flag		CS Education Services Announcing the new 2005 Fall Sch the shares			
Malbox	Scares par		Attachments		al Defense - RAVI SUBRAMANIAN (OMS)			
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🗷 🤤 Inbox			Importance					
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3 Carch Fi	olders		Snow in Groups	point	tment of Interim Provost and Executive Vice Presiden			
🗏 🎒 AlBusSchool			Show Views In Navigation Pane	MO	onstruction Traffic Update			
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Inbox (	325)		A FACILITIES S		Messages with AutoPreview			
词 Junk E-m	al		A FACILITIES S		Last Seven Days			
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Sent Iten	16 Indexe		Date: Three Weeks Aco		Card To			
search P	Norrs Norrs		and the state weeks Ago	in	Serve in the serve in the serve			

Views for folder "Inbox":		$\frown$	1	
View Name	Can Be Used On	View Type A New		Contentes View Menuelan
<current settings="" view=""></current>	All Mail and Post folde	rs Table		
Messages	All Mail and Post folde	rs Table Cory		Description
Messages with AutoPreview	All Mail and Post folde	rs Table		
Last Seven Days	All Mail and Post folde	rs Table Modify		Fields Importance, Icon, Flag Status, Attachment, From, Subject,
Unread Messages in This Folder	All Mail and Post folde			
Sent To	All Mail and Post folde	Create a New View		Group By None
Message Timeline	All Mail and Post folde	Name of new view:		Sort Received (descending)
		New view		
L		Type of view:		Filter Off
Description		Table		
Fields: Importance, Icon, A	ttachment, From, Sub	Timeline		Other Settings Fonts and other Table View settings
		Card DavidVeek/Month		
Group By: Arrangement Label (	(descending)	Icon		Automatic Formatting User defined fonts on each message
Sort: Received (descendin	ig)			Format Columns Specify the display formats for each field
Filter: Off				
		Can be used on		Reset Current View OK Cancel
		<ul> <li>This folder, visible to everyone</li> </ul>		
Only show views created for th	is folder	O This folder, visible only to me	r	
	tanka tinus	Al Mail and Post folders		
	oppy new Clo			
		ОК	Cancel	

X

## **Out of Office Assistant**

If you are going to be out of the office, you can have Outlook send an automatic message for you. You specify the text and can activate filtering rules. This message will only be sent once to each person that emails you while the Assistant is active. When you return and open Outlook, you will be prompted to turn off the Out of Office Assistant.



## **Calendar Folder View**

O Calendar - Microsol	t Outlook								
Ele Edit Yew Go	Iools Actions Help	Type a question for help 🔹							
🗄 🖬 New 🕞 🍊 🗙 🏢 🗊 Today 🚺 Day 🛐 Work Week 🛐 Meek 🛐 Month   🏠 Find   🛄 Type a contact to find 💽 🦉									
: 🧐 🞯 Back 💿  🔟	🧐 🎯 Back 💿 🚺 📄 🛕 🔊 🔚 Day/Week/Month								
Calendar	Calendar	August 04, 2005 🧰							
My Calendars	Thursday, August 04	^							
Calendar (1) Calendar in AllbusSc Calendar Open a Shared Calenda Share My Calendar	8 am 9 <sup>00</sup> 10 <sup>00</sup> 11 <sup>00</sup> 12 pm	S M 1 W 1 F S 31 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 1 2 3 4 5 6 7 8 9 10 Cick here to ad There are no items to show in this view.							
0 Items	1 <sup>00</sup> All folders are	up to date. O Connected •							

The difference between an Appointment and Meeting is an Appointment only involves you, whereas a Meeting has other invited attendees and resources:

Outlook Training Appointment	Dutlook Training Meeting
Ele Edit View Insert Format Icols Actions Help	Elle Edit View Insert Format Iools Actions Help
🚦 🙀 Save and Close   🍓 🏢   🕂 Recurrence   🛗 Igvite Attendees   📍 🌡   🗙   🐟 🔹 🔹 🖓 🖓 👷	🗄 🖃 Şend   🎯 🌐   🛄 🖏 / 🕀 Recyrrence 🙀 Cancel Igyitation   📍 🌲   🗙   🐴   🕹 💂
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Location: Ross School of Business	To <sub>p</sub>
Skart time;         Mon 0(15/2005         © 600 AM         C All dag event.           End time:         Mon 0(15/2005         © 6:00 AM         V	Subject: Outlook Traning Location: Ross School of Business V Lagel: None V
Berninder: 15 minutes     Shog time as: Dusy	Start time;         Mon 8/15/2005         Image: Constraint of the start of the s
0	VBeminder: 15 minutes V (k) Shogg time as: they

## **Creating a new Appointment or Meeting**

#### Using keystrokes or menus

- Ctrl+N or Double click any empty space in any Calendar folder
- Ctrl+Shift+A (appointment) or Ctrl+Shift+Q (meeting) from any folder
- From menu: File... New... Appointment (or Meeting Request)
- "New" button (use dropdown if in a non-calendar folder)



#### Using an email message

Drag and drop the message onto the Calendar folder. The message will be in the notes section of the Calendar item:

🔝 Michigan	Leadership Program (MLP) / Global Citizenship Day - Event	
Ele Edit	Vjew Insert Format Iools <u>A</u> ctions <u>H</u> elp	
Save and	Close   🎒 🌐   🕂 Recyrrence   🛗 Igvite Attendees   📍 🌡   🗙   🐟 - 🗇 -   🖓   😡 🌉	
Arial	•   10 •   A   B I U   新春酒 注 读 读	
Appointment	Scheduling	
Subject:	Michigan Leadership Program (MLP) / Global Citizenship Day	
Location:	Label: None	~
Start time:	Wed 8/3/2005	
En <u>d</u> time:	Wed 8/3/2005 💙	
Reminder	18 hours V 💽 Show time as:	
From: Sent: To: Subject:	ROSS MLP Friday, July 29, 2005 12:22 PM BUS - All Regular Faculty; BUS - All Regular Staff Michigan Leadership Program (MLP) / Global Citizenship Day	
The Mich	igan Leadershin Program Welcomes Your Particination	~
⊆ontacts	Categories	Private

#### From the Contacts folder



### **Appointment and Meeting Settings**



#### **Scheduling a Meeting**





Cancel

OK

Remove Recurrence

## **Contacts Folder View**



## **Creating a new Contact**

#### Using keystrokes and menus

- Ctrl+N or Double click any empty space in any Contact folder
- Ctrl+Shift+C from any folder
- From menu: File... New... Contact
- "New" button (use dropdown if in a non-contact folder)



#### Using an email message

Drag and drop the message onto the Contacts folder. The message will be in the note section of the Contact item:



#### Using an existing Contact

You can always use Copy and Paste to create a new contact based on one that is similar, but if the similarities are based on their company, open the existing contact and use "New Contact from Same Company" instead:

Software Support - Contact	S Ross Computing Services - Contact
Elle Edit Yew Insert Figmat Tools       Actions       Help         Swe and Close       Image: Swe and	Image: Services       Image: Services         Image: Services       Image: Services

## **Viewing Contacts**

A number of predesigned views are available with a single click in the Navigation Pane of the Contacts window. You can use Categories to organize your Contacts.





## **Importing and Exporting Contacts**

You can bring contact information into Outlook from a number of sources, or create other data files from your Contacts folder using the Import and Export Wizard.



### Exporting Contacts



#### Importing Contacts

To import from an Excel file, the first thing you must do is name the region that contains your data:

2	Micro	soft Ex	cel - Co	intac	ts															_		×	
8	Eile	Edit	⊻iew	Ins	ert F <u>o</u> rmat	Tools	Da	ita ⊻	Vindow	Help	)					Ty	pe a i	question for	help		8	×	
	1		50		C <u>e</u> lls				<b>v</b> 10	• 1	8 <i>I</i>	U	<b>F</b> 3		-	\$	%	€ <b>=</b>   193 •	. 8	A		»	
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2	Spo	ngebo	b Squi	d <b>G</b> e	Chart			t	Biki	ni Bot	tom	Ocea	inica	spon	gebob	@kr	abby	patties.co	m				
3	Pro	lessor	Uton		Cilar			urt	low D-ll	msville	9	USA		prote	ssoric	oppg	com	1					
4	Ast	oby	Dee		Symbol				Spo	et lov	wn Io	USA		gotta	havee by@r	mail	arvin	<u>kemon.co</u>	<u>m</u>				
6	Pet	er	Park		Page <u>B</u> reak				Que	ens	10	NY		spide	arman	(Den	mics	s com					
7	Cla	'k	Kent	fn	Eunction			-	Met	ropoli	s	USA		supe	rman(	Dcor	nics	.com					
8	Jea	n	Grey		Name		.(		Define			NY		Define	Name								? ×
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12	Bru	orge	Jets		Picture		•	9	reate.		own	Spac	e	í –									
13	Art	nur	Fonz	0	Diagram			1	Apply		.3	WI											Close
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Once this is done, save and exit from your Excel file and import the file exactly like importing from Access, being sure to map your fields.

## Using a Contact to simplify tasks

#### Using Outlook - new message, meeting or task

With just a right mouse click on any contact, you can easily create a new message, meeting, task, etc.



#### **Using Word – Letter Wizard**

The Letter Wizard will automatically set up your letter using the address and information stored in your contact. All you need to do is write the letter!

🔘 Contacts - Microsoft Outlo	ok	
Eile Edit View Go Tools	Act	ions <u>H</u> elp
🖲 New 👻 🎒 🎦 🗙 🛛 🔻 🕴	8	New Contact Ctrl+N
🧐 🚱 <u>B</u> ack 💿 🗖 📙 🛕		New Contact from Same Company
Contacts	\$	New Distribution List Ctrl+Shift+L
My Contacts	둽	New Message to Contact
S Contacts	•	New Letter to Contact
Sector Contacts in Mailbox - UMBSSo	5	New Meeting Request to Contact <sup>®</sup>
Sel Contacts in AlBusSchool		New Appointment with Contact
Current View	-	New Task for Contact
Address Cards     Datalad Address Cards		New Journal Entry for Contact
Phone List		Link 🕨
O By Category		Call Contact
By Company	22	Call Using NetMeeting
O By Location	٣	Follow Up Ctrl+Shift+G
By Follow-up Flag		Forward as <u>v</u> Card
Open Shared Contacts		Forward Ctrl+F
Share My Contacts	Ť	
Customize Current View	-	and a second

## **Distribution lists**

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Memb	ers Notes	
Name:		
Selec	t Members) Add New Remove	Update Now
NA L	ame 🛆 🖻 Email	
	There are no items to show in this view	
Select Members Type Name or Select from List: Show Names from the:	Add N	en Hember 🛛 🔀
Business School		
Name Business Phone Of	fice	E-mail address:
Tuet, Caroline Ulrich, David		E-mail type: SMTP Custom type
um exec ed UMBS-AlumniEmail		Internet format: Let Outlook decide the best sending format
UM8S-International UM8SIS		Add to Contacts
UMBSLaptopHelp UMBSSoftHelp		OK Cancel
UMBusPhD, Inquiries Only UMIchHRM3		
umichigan	×	
Add to distribution list:		
Members -> UMBSLaptopHelp; UMBSSoftHelp		
Advanced  Cance OK Cance		

## Sharing Contacts and Distribution lists with other Exchange users

You can either forward the Contact item:



or attach it to a new email message:

Either way, you will have an email message with the contact item attached that the recipient can drag and drop into their own Contacts folder.

## **Tasks Folder View**

Tasks - Microsoft 0	utlook	
Ele Edit View Go	Lools Actions Help	Type a question for help 🔹
🛿 🖉 New 🔹 🖓 🖓 🗙	Pind Dig Type a contact to find	
🧐 🎯 <u>B</u> ack 🎯 🚺	🖹 🛕 🔊 Simple List 🔹 📄 🚰 💐 💂	
Tasks	Tasks	2
My Tasks	D 🗹 Subject	Due Date
nasks 🔷	Click here to add a new Task	
Tasks in AlBusSc	There are no items to show in this view.	
Current View		
<ul> <li>Simple List</li> </ul>		
O Detailed List		
<ul> <li>Active Tasks</li> </ul>		
Next Seven Day:		
Overdue Tasks		
By Category		
<ul> <li>Assignment</li> </ul>		
By Person Respc		
0 Items	All folders	are up to date. 🧿 Connected 🔹 🛒

## **Creating a new Task**

Using keystrokes or menus

- Ctrl+N or Double click any empty space in any Task folder
- Ctrl+Shift+K from any folder
- From menu: File... New... Task
- "New" button (use dropdown if in a non-task folder)



#### Using an email message

Drag and drop the message onto the Tasks folder. The message will be in the note section of the Task item:

TIME SHEETS	S - Task							
Ele Edit Ve	w Insert Format	Iools Actions Help						
Save and Clo	📴 Save and Close   🐰 🗈 🖭 🌒 🕂 Recyrrence   🍰 Assign Task   🗞 💅 🗙 🔞 👘							
Arial	▼ 10 ×	<u>A</u>   B <i>I</i> U   E 著 書 注 读 读						
Task Details								
Subject:	TIME SHEETS							
Due date:	None	Status; Not Started	*					
Sta <u>r</u> t date:	None	Y Priority: High Y % Complete: 0%	\$					
Reminder:	None	None V Owner: Keiser, #						
To: Subjects	BUS - All R	egular Staff	^					
Subject	TIME SHEE	.15	_					
Importance:	High							
Due to the Ju	ly 4th holiday, time	sheets are due by 4 pm today.						
			~					
Contacts		Categories	Private 🗌					

## **Settings for Tasks**

Due Dates, Reminder and Status

🕏 Untitled - T	ask 📃 🗆 🔀
Eile Edit Vi	iew Insert Format Iools <u>A</u> ctions <u>H</u> elp
🗄 🛃 Save and Clo	ose   🐰 🐚 🖹 🕕   🕂 Recyrrence   🥔 Assign Task   🏂 🎺   🗙   🥹 🦷 🍟
System	
Task Details	
Due in 6 days.	Not Started
Subject:	In Progress Completed Waiting on someone else Deferred
<u>D</u> ue date:	Mon 8/15/2005 🕑 Status: Not Started 👻
Sta <u>r</u> t date:	Mon 8/15/2005 🛛 Priority: Normal 🗸 % Complete: 0% 🗘
Re <u>m</u> inder	S         M         T         F         S         S         M         T         F         S         S         M         T         W         T         F         S         S         M         T         W         T         F         S         S         Owner:         Keiser, #         E         S         M         Image: Comparison of the second of the s
Contacts	Today None Eategories Private

## Recurring Tasks

Task Recurre	nce 🔀
Recurrence pa	ittern
ODaily	Recur every 1 week(s) on
💿 Weekly	Sunday Monday Tuesday Wednesday
Monthly	Thursday Friday Saturday
○ Yearly	O Regenerate new task 1 week(s) after each task is completed
Range of recu	rrence
Start: Mon 8	3/15/2005 🔹 💽 No end date
	C End after: 10 occurrences
	O End by: Mon 10/17/2005
	OK Cancel Remove Recurrence

## Assigning a Task

### Assigning an existing Task

Click "Assign Task" on the toolbar and enter the name of the person you are assigning it to:

🖻 New task - Task	🕏 New task - Task
Ele Edit View Insert Format Iools Actions Help Save and Close   & Ba Ba Ba Ba Ba Carence	Elle Edit Vjew Insert Format Iools Actions Help I⊡Spend X 20 20 40 10 20 00 Recorrence xQCancel Assiggment X 30 00 00 System - 10 - 1 A   B Z 11   E 20 20 10 10 00 00 00 00 00 00 00 00 00 00 00
Task Details Subject: New task	Task         Detais           This message has not been sent.
Due date: None Status: Not Started Statt date: None Priority: Normal % Complete: 0%	Que date:         None         Status;         Not Started         M           Statt date:         None         Priority:         Normal         % Complete:         0% \$\$
Reminder: None None Owner: Kaiser, Anjal	Keep an updated copy of this task on my task list     Send me a status report when this task is complete
Contacts Private	Contacts Categories Brivate

Assigning a Task from the Contacts folder



Keep an updated copy of this task on my task list

Send me a status report when this task is complet

Status: Not Started

Categories...

v

Priority: Normal

None

Due date:

⊆ontacts...

Start date: None

#### **Status reports**

If you select "Keep an updated copy of this task on my task list", you will receive an update message each time the status of the task changes. You can also ask to receive a status report when the task is complete.

Otherwise, you can email them for a status report, and they simply need to click the "Send status report" button on the toolbar or from the Actions menu:

🖻 New task - Task								
Eile Eo	lit ⊻iew Inser	t F <u>o</u> rmat	<u>T</u> ools	Acti	ons <u>H</u> elp		_	
Save	and Close   🐰 🛛	6 <b>1</b> 8 (	3	2	New T <u>a</u> sk	Ctrl+N		
Arial	-	10 -	AB	2	S <u>e</u> nd Status	Report		
Task	Details			2	<u>R</u> eply	Ctrl+R		
				Reply to All	Ctrl+Shift+R			
Ассерсе	o by Lamparter, P	atti on 8/9/2	005 2:56		For <u>w</u> ard	Ctrl+F		
Subject:	New task						1	
Due date:	None							
Status <u>:</u>	Not Started	Priority:	Normal		% Complete:	0%		
Owner:	Lamparter, Patti							
الجاري المراجع والمستعل المراجع والمستعل								

## Notes



### **Creating a new Note**

Using keystrokes or menus

- Ctrl+N or Double click any empty space in any Note folder
- Ctrl+Shift+N from any folder
- From menu: File... New... Note •
- "New" button (use dropdown if in a non-note folder) •



#### Using an email message

Simply drag and drop the message onto the Notes folder. The message will be in the notes section of the Note item:



## **Color coding Notes**

Notes can be color coded for sorting or categorizing.

The first line of a note is always its title, which is what will be seen when the note is closed. Type a few words, then hit enter and type the rest of the note:



ø