

OUTLOOK 2000

Intermediate - Part 2

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Rules Wizard

Using the Rules Wizard is similar to using the Filtering feature in Simeon. It allows you to set up rules to automatically perform actions on messages meeting certain criteria. Rules can be set to perform actions on messages arriving in your Inbox or those that you are sending out.

Examples of rules you can create:

- Move messages to a particular folder based on who sent them or the subject text
- Assign flags with deadlines to messages sent to you by a particular person
- Have a copy of messages that you send to a certain person automatically sent to a particular folder
- Ask the server to automatically reply to a certain type of message by using a message you have previously created.
- Set up a notification, e.g. message or sound, when a high importance message arrives

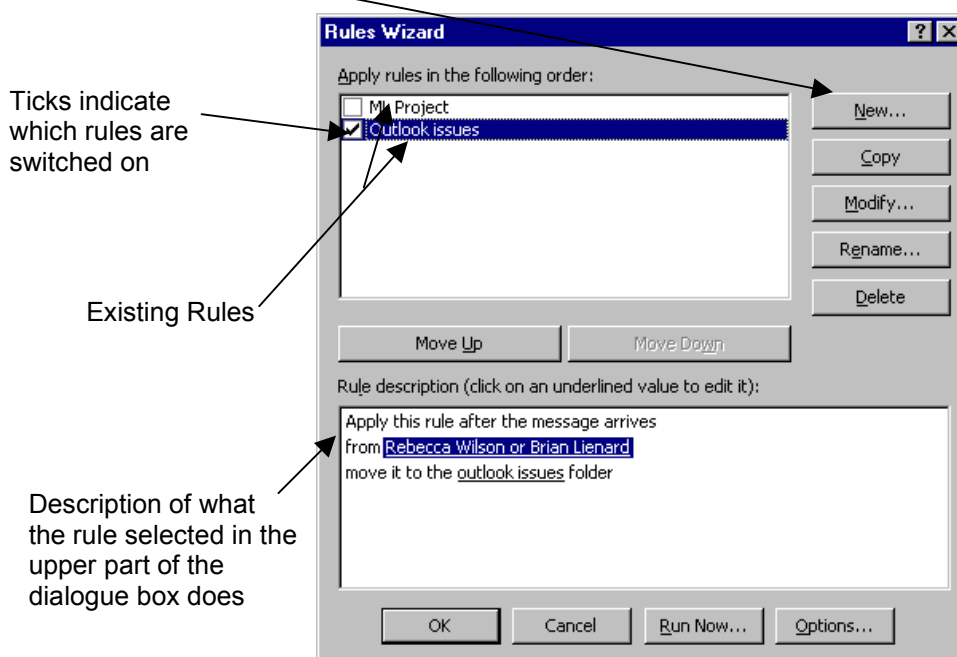
Exceptions can be added to your rules for special circumstances, for example, the rule can be set to move all messages from a certain person to a subfolder with the exception of flagged messages which will be left in the Inbox.

Rules can be run manually or automatically. Manually means that you can apply the rules to messages already in your Inbox.

You can also turn rules on or off and change the order in which the rules are applied.

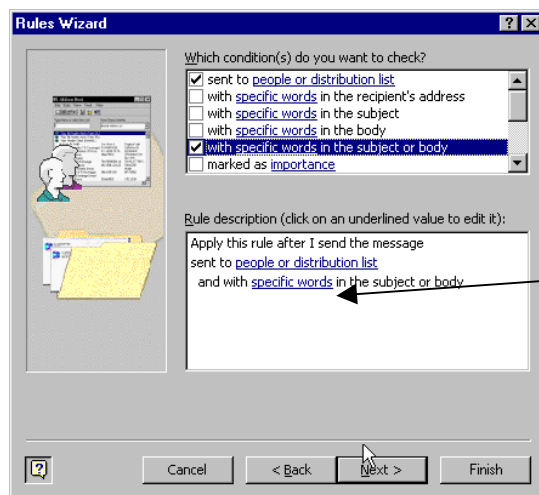
TO CREATE A NEW RULE

1. Make sure you are in one of the e-mail folders (e.g. Inbox, Sent Items)
2. Select **Rules Wizard** from the **Tools** menu on the Outlook window and the dialogue box shown below should appear.
3. Click the **New** button to start the Wizard



4. The Wizard is a series of dialogue boxes which allow you to make all the necessary choices relating to the rule you are setting up. You will usually see at least three dialogue boxes when using the Wizard. When you have made all the selections you require in one dialogue box, click on the **Next** button to move onto the next part.

Typical dialogue box from the Rules Wizard.



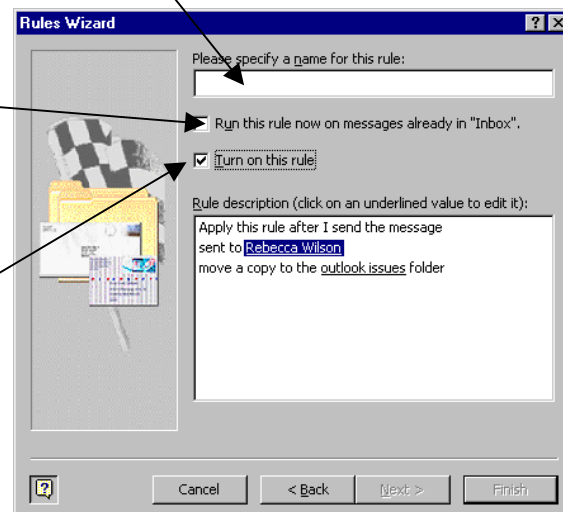
When you select an option or options from the upper pane you will be offered at least one option in the lower pane.

If you see blue underlined words in the lower pane you need to click on them and make selections from whatever choices are offered to you. e.g. select a person or persons from an address book, or the name of a subfolder.

5. In the second last dialogue box you will be offered a chance to set exceptions to the rule so that in specific cases Outlook will ignore the rule.
6. In the final wizard dialogue box you are asked to name the rule.

If you wish to run the rule on messages already in the Inbox, click this checkbox

If you wish to create this rule but are not ready to have it switched on take the tick off this checkbox.

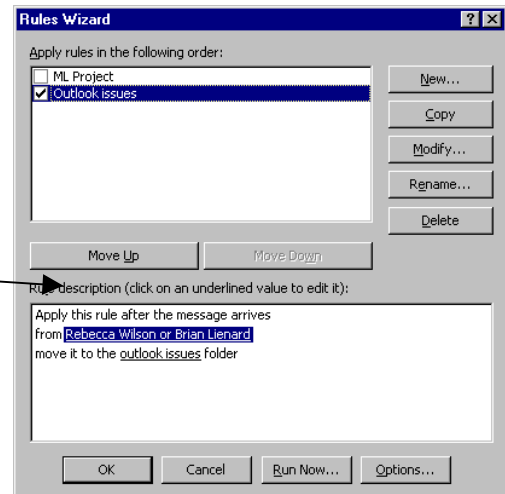


7. When you have entered a name for the rule and made your final selections the **Finish** button will become active. Click the **Finish** button and you will be taken back to the main Rules Wizard dialogue box where you will see your new rule listed.

MAKING CHANGES TO RULES

You can edit, delete, rename, switch on and off any of the rules. To do this call up the Rules Wizard dialogue box (Tools - Rules Wizard) and click on the appropriate buttons or add and remove ticks from check boxes

You may also reorder the rules in this dialogue box by selecting the rule and clicking the **Move Up** or **Move Down** buttons. The rules will now run in the new order. This may be critical if some messages meet the criteria of more than one rule.

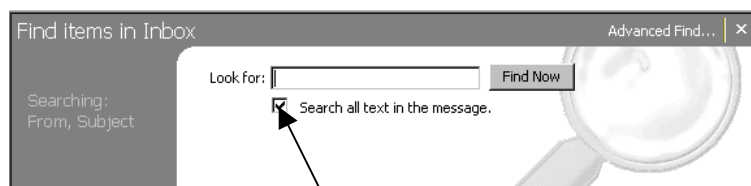


Using Find

Once you have many messages built up in your folders you may sometimes find locating a specific message quite a difficult task. The **Find** button allows you to filter for messages with specific words or phrases in the subject line or message text. The **Advanced Find** feature allows you additionally specify other criteria for the find, such as who the message was sent from or when it was sent.

USING THE FIND BUTTON

1. Open the folder or subfolder you wish to search. (The basic find feature can only search one folder at a time)
2. Click the **Find** button on the Outlook window toolbar and the following Find pane will appear just above the message headers.
3. Type in the word, partial word or phrase you wish to search for in the *Look For:* box.

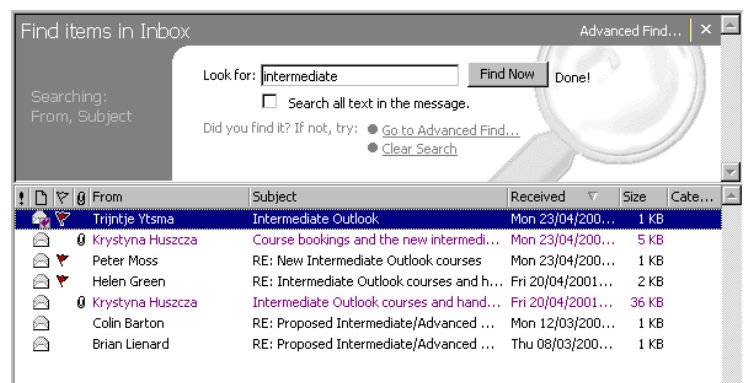


NOTE:

If you wish Outlook to search just through the subject line text and not the message text as well you need to remove the tick from this checkbox.

4. Click the **Find Now** button. This will start the search and all the messages containing the words or phrases you specified will be listed below the Find pane.

Results of search



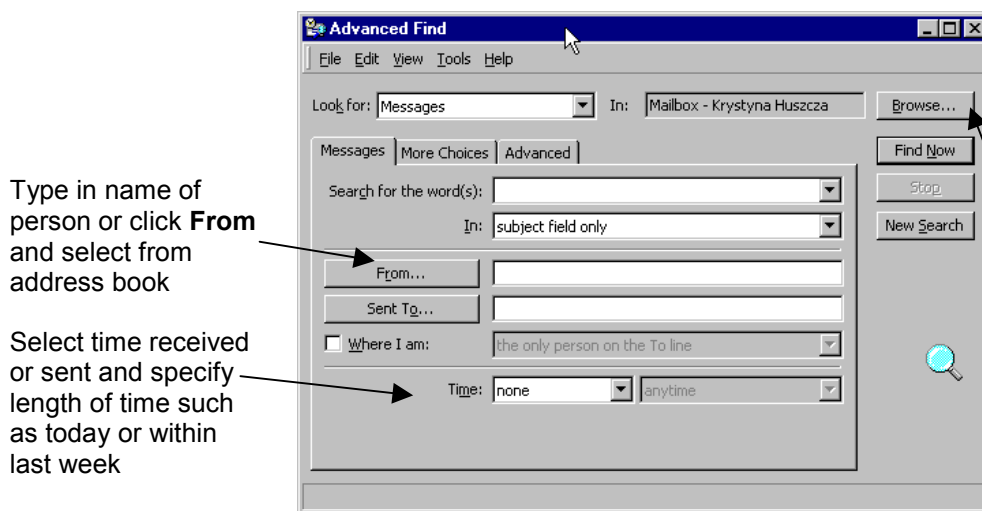
TO SHOW ALL THE MESSAGES

If you wish to clear the find results and bring back all the messages click on the **Clear Search** option at the bottom of the Find pane.

USING ADVANCED FIND TO NARROW A SEARCH OR SEARCH MORE THAN ONE FOLDER

Advanced Find can be used to narrow your search, set up a more complex filter or to search more than one folder

1. Click the **Advanced Find** option at the top right corner of the Find pane or the **Go to Advanced Find** option near the bottom of the Find pane. This will call up the Advanced Find dialogue box.
2. Specify the criteria you require, e.g. from, sent to, time when sent, type in words you wish to search for and specify where you wish to search.

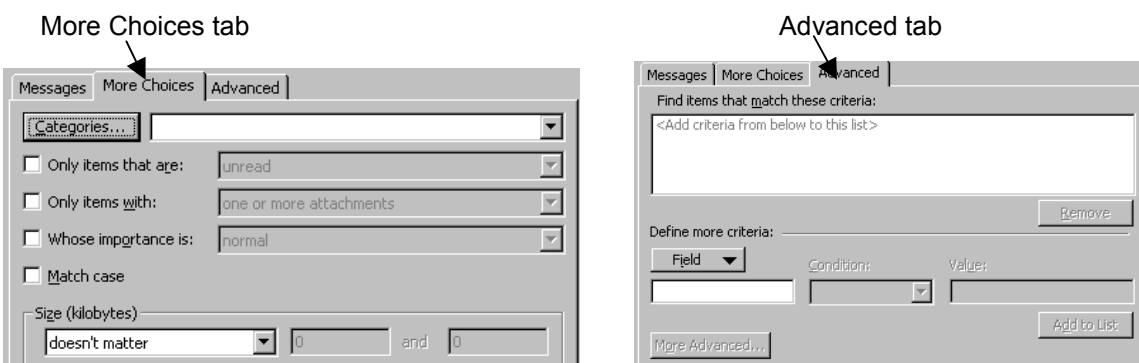


NOTE:
You may be very specific about which folders and subfolders are to be searched. The default is for *Mailbox* to be selected which means that it will search all your mailbox folders. If you click on the **Browse** button you can select which folders and subfolders you wish to search.

3. Click the **Find Now** button to run the search. The results of your search appear under the Advanced Find dialogue box.
4. To close the Advanced Find dialogue box click on the X close button and you are taken to the Find pane. You may either close down the Find pane or Clear the search.

TIP

The Advanced Find dialogue box has two tabs which are worth exploring as they offer even more choices for your search



Voting Buttons

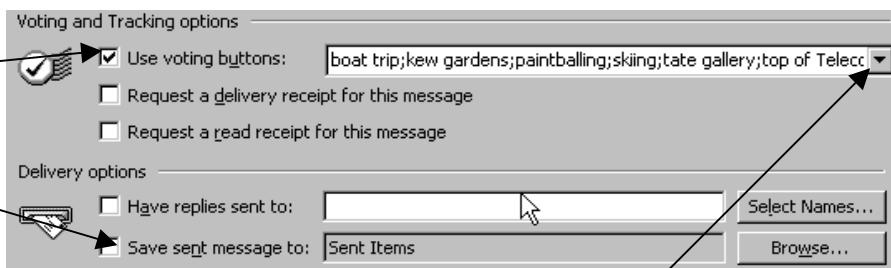
You may wish to have a group of people vote on their preferred choice from a selection of choices offered to them. It is possible for you to send out a message to the group of people which contains a button for each choice you have to offer. Each recipient votes by clicking on the button representing their choice. As the responses come in Outlook will track and calculate the results.

NOTE:

This feature will only work with users on the same Exchange Server, i.e. only Institute members of staff using Outlook.

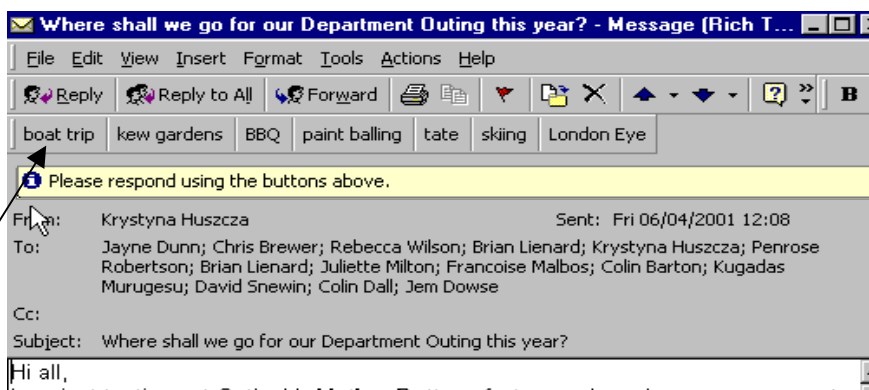
TO CREATE A MESSAGE WITH VOTING BUTTONS

1. Start a new message and put your question in the Subject field.
2. Click on the **Options** button on the message window toolbar to bring up the Message Options dialogue box.
3. Mark the check box *Use voting buttons:*
4. make sure the *Save sent message to:* is marked **(essential if you wish to track the results)**
5. Either
 - select from any set of voting choices from the drop down list, where you can select groups of choices such as: Yes; No, or Approve; Reject
 - type your own list of choices into the box, separating each with a semicolon
6. Click the **Close** button and complete and send the message



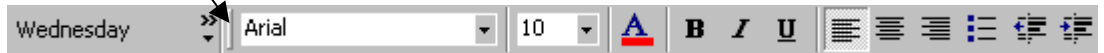
TO VOTE WHEN YOU RECEIVE A VOTING MESSAGE

1. The question for the vote will usually be in the subject field. Open the message and the instructions will be placed in the yellow banner.
2. To send in your vote click on the button of your choice

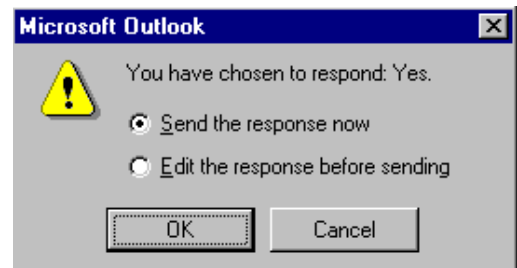


NOTE:

It is sometimes difficult to see all the buttons as the formatting toolbar may have been set to be on a separate row from the standard toolbar. If this is so only the first one or two button will be visible, all the rest will be hidden behind the formatting toolbar. To view all the buttons click on the vertical bar at the beginning of the format bar and drag right to expose all the buttons



3. You will be asked if you wish to send the response now or take the opportunity to edit the message before sending in the vote. If you choose to edit you will be able to add more text into the body of the message or add/remove people from the To or Cc boxes.

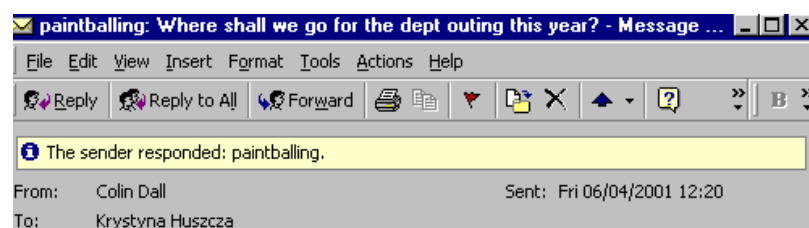


VIEWING THE VOTING RESPONSES

Every time someone votes you will receive a message from that person in your Inbox. On the message header the subject text will be prefixed by the senders' choice.

	From	Subject
	Jem Dowse	paint balling: Where shall we go for our Department ...
	David Snewin	paint balling: Where shall we go for our Department ...
	Juliette Milton	skiing: Where shall we go for the dept outing this ye...
	Brian Lienard	London Eye: Where shall we go for the dept outing t...
	Colin Dall	paintballing: Where shall we go for the dept outing t...

If you open the message the voter's choice will appear in the yellow banner at the top of the message window



TRACKING THE VOTING RESPONSES

If you have saved a copy of the original message to your Sent Items folder you will be able to track the responses.

1. Locate the copy of the original message and open it.

2. Click on the **Tracking** tab

Summary of results showing most popular choice first

List of all users who received your original message

Message Tracking

This message was sent on 06/04/2001 12:20.
Reply Totals: skiing 2; paintballing 1; tate gallery 1; boat trip 0; kew gardens 0; top of Telecom Tower 0; London Eye 0

Recipient	Response
Rebecca Wilson	
Juliette Milton	skiing: 06/04/2001 12:55
Brian Lienard	tate gallery: 06/04/2001 12:22
Penrose Robertson	
Chris Brewer	
Krystyna Huszcza	skiing: 06/04/2001 12:20
Colin Dall	paintballing: 06/04/2001 12:20
Francoise Malbos	

Results for each individual appear here as they come in

Setting Options for Outgoing Messages

There are various options you can set before sending out individual messages. This section looks at the following options: importance, sensitivity, delivery and read receipts, setting message expiry times and delaying sending messages.

All these options can be set from the **Message Options** dialogue box shown opposite.

Message Options

Message settings: Importance: Normal, Sensitivity: Normal

Security: ☐ Encrypt message contents and attachments, ☐ Add digital signature to outgoing message

Voting and Tracking options: ☒ Use voting buttons, ☐ Request a delivery receipt for this message, ☐ Request a read receipt for this message

Delivery options: ☐ Have replies sent to: [text box] Select Names..., ☐ Save sent message to: Sent Items Browse..., ☐ Do not deliver before: [dropdown], ☐ Expires after: [dropdown]

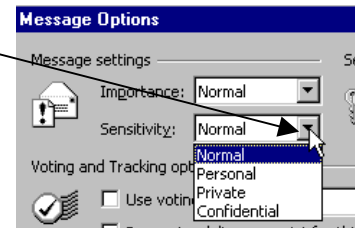
Contacts... Categories... Close

Importance/Sensitivity

Importance and sensitivity can be set to indicate to the recipient how they should treat the message. For example, one of the options under Sensitivity, such as Personal or Confidential, can be set to indicate to the recipient that the message is not for publication. When the recipient receives the message the importance and sensitivity status will be listed on a yellow banner at the top of the opened message window.

TO SET THE IMPORTANCE OF SENSITIVITY STATUS

1. Start a new message and click on the **Options** button on the message window toolbar to bring up the Message Options dialogue box.
2. Click the down arrow by the Importance or Sensitivity boxes and select the option you require.
3. Click the **Close** button



NOTE:

When Private status is applied to a message the recipient will not be able to edit any of the text.

Delivery and Read Receipts

It is sometimes useful to request delivery or read receipts. Receipts can be requested for each individual message that is sent or can be programmed to be automatically sent whenever you send a message.

NOTE:

The receipt features work very well when e-mailing other people at the Institute but they are not always successful when e-mailing people outside the Institute.




TO REQUEST DELIVERY OR READ RECEIPTS FOR AN INDIVIDUAL MESSAGE

1. Start a new message and click on the **Options** button on the message window toolbar to bring up the Message Options dialogue box.
2. Tick the check box(es) for the option(s) you require and click the **Close** button
Request a delivery receipt for this message
Request a read receipt for this message

TO REQUEST DELIVERY OR READ RECEIPTS FOR ALL MESSAGES SENT

1. Select **Options** from the **Tools** menu on the Outlook window
2. Click the **Preferences** tab
3. Click **E-mail Options**, and then click **Tracking Options**
4. Select the check box(s) you require and click the **Close** button
Request a delivery receipt for all messages I send
Request a delivery receipt for all messages I send

RECEIPTS ARRIVING IN YOUR INBOX

	From	Subject
	Rebecca Wilson	Read: useful software
	Brian Lienard	Read: new training handout
	System Administrator	Delivered: testing

Read receipts

- will arrive in your Inbox and appear to have been sent from the recipient.
- the subject title will be prefixed by *Read:*
- the icon will contain a green tick

Delivery receipts

- will arrive in your Inbox and appear to have been sent from the System Administrator.
- the subject titles will be prefixed *Delivered:*
- the icon will contain a green forward arrow

Receipts from Outside Institute

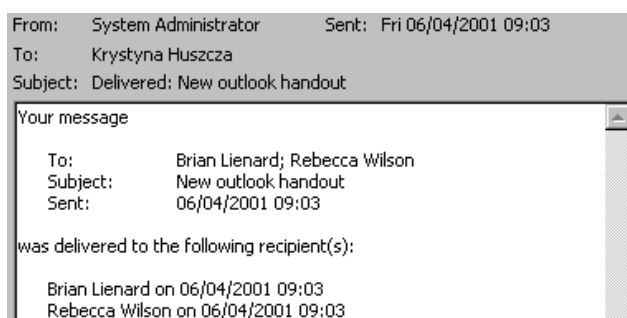
Read and delivery receipts may or may not work with outside Institute users as it depends upon their system and how it is set up.

The results of a delivery and read receipt test to an outside Institute user is shown below. Note that the icon for the delivery receipts is different and a read receipt failed to arrive.

 System Administrator Delivered: info to all non-Institute members

CONTENTS OF A RECEIPT

When you open a receipt you will find information about who received delivery of or read your message and at what time.



Delay Message Delivery

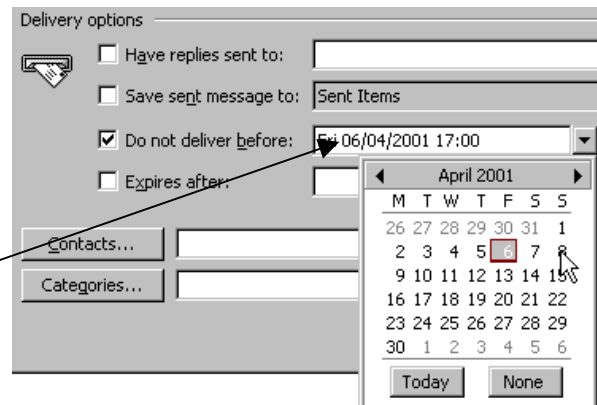
You may wish to delay sending a message until a specific date and time, maybe because you think you may forget to send it later.

TO DELAY MESSAGE DELIVERY

1. Start a new message and click on the **Options** button on the message window toolbar to bring up the Message Options dialogue box.
2. Mark the *Do not deliver before*: check box and then set the date by clicking on the down arrow and selecting a date from the drop down calendar which appears. Amend the time to the exact time you require.

TIP:


You could type in the date or something like *week from Fri* and the AutoDate feature will select the correct date



3. Click on the **Close** button

READING DELAYED MESSAGES

When the recipient opens the message they will see a yellow banner at the top of the message window with details of the delayed settings:

 This item has been marked to be delivered after 06 April 2001 09:30.

NOTE:

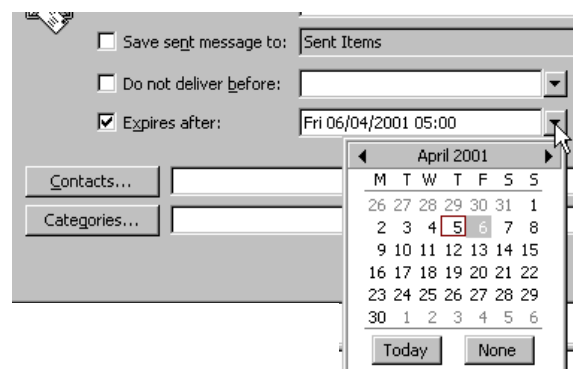
This feature will only work if you leave your computer turned on and Outlook opened at the time delivery is due.

Setting Message Expiry Times

You may wish to set a message you are sending out to expire on a certain date and time if it will become irrelevant by then. For example, you may want to e-mail your department to say that there are left-over cakes and sandwich from a meeting and set the expiry to later that day. This will mean that anyone not in that day will not waste time reading the message only to find that the message is now irrelevant when they come into work the next day.

TO SET AN EXPIRY DATE FOR A MESSAGE

1. Start a new message and click on the **Options** button on the message window toolbar to bring up the Message Options dialogue box.
2. Mark the *Expiry After*: check box and then set the expiry date by clicking on the down arrow and selecting a date from the drop down calendar which appears. Amend the time to the exact time you require.
3. Click on the **Close** button



MESSAGE AFTER EXPIRY

When a message reaches its expiry date it is either removed from your Inbox or the message header will change its appearance - grey colour text and have a line through it as shown below. What happens depends upon whether the message was opened by the recipient or not.



If you open a message which has the appearance as shown above you will see a yellow banner with the expiry details.

NOTE:

You may find that messages are not expiring at the exact times you have set. This is because the expiry setting is not looking at your computer's clock but the clock on a server.

NOTE:

If you wish to set an expiry date for a message you have already received right click on the message header, select **Options**, tick the *Expiry After* check box and set the expiry date as above.

Diverting Incoming Replies to Another User

You may have sent out a message to a group of people requesting some information but wish all the replies to go to one of your colleagues who have agreed to process all the information. It may be that your team requires an urgent response to the message but you will not be at work to process the replies and wish to make sure the response will go to someone else in your team.

TO DIVERT INCOMING REPLIES

1. Start a new message and click on the **Options** button on the message window toolbar to bring up the Message Options dialogue box.
2. Mark the check box *Have replies Sent To:*
3. Either type the e-mail address of the person you wish to direct replies to or click on the **Select Names** button and select from the address books.



TIP:

If you add your name to the list you will have a record of all the replies that arrived in your absence

4. Click **OK** and complete the message.

Resending and Recalling Messages

You may sometimes need to resend a message for reasons such as the recipient's server was down and the original message was lost, another user needs to see a copy of the message you sent or you may have sent the message to an incorrect address. Outlook allows you to resend a message without having to recreate it. When you resend you have the chance to make any edits to the message text, add attachments or change the recipient names.

You may wish to recall a message if you have changed your mind about sending it or maybe you forgot to add the attachment before sending it. Outlook is able to recall a message only if the recipient has not yet opened it.

NOTE:

These features are **only possible** if you have saved a copy to the Sent Items folder or another appropriate folder.

TO RESEND A MESSAGE

1. Open the copy of the message you wish to resend in your Sent Items folder, or whichever subfolder you sent the copy to
2. Carry out any changes required
3. From **Actions** on the message window menu bar select **Resend This Message**. This will create a copy of the message. Make any changes that are necessary
4. Click the **Send** button on the copy of the message

TO RECALL A MESSAGE

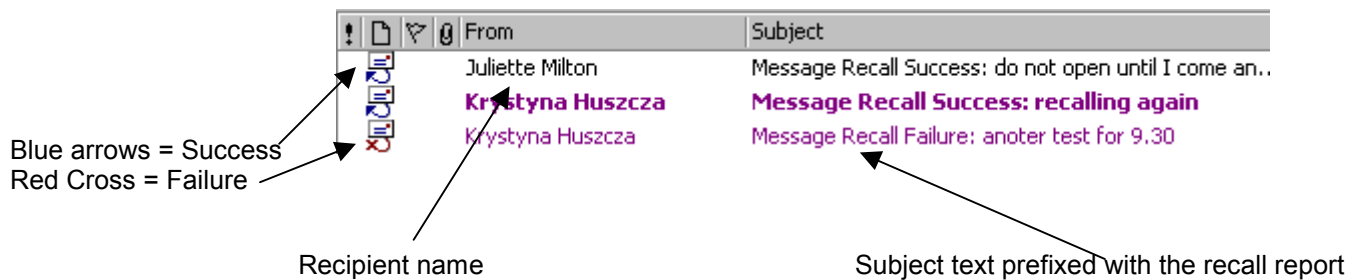
1. Open the copy of the message you wish to resend in your Sent Items folder, or whichever subfolder you sent the copy to.
2. From **Actions** on the message window menu bar select **Recall This Message**. The following dialogue box will appear



3. Mark your choices and click OK

MESSAGES REPORTING SUCCESS OF RECALL

If you switched on the option to be told whether recall was successful or not you will receive a message in your Inbox which will tell you the result of the recall for each recipient.



If you open these messages you will see a report with all details such as the date and time the message was recalled.

Tips and Tricks

This section covers various short tips and tricks which you may find useful.

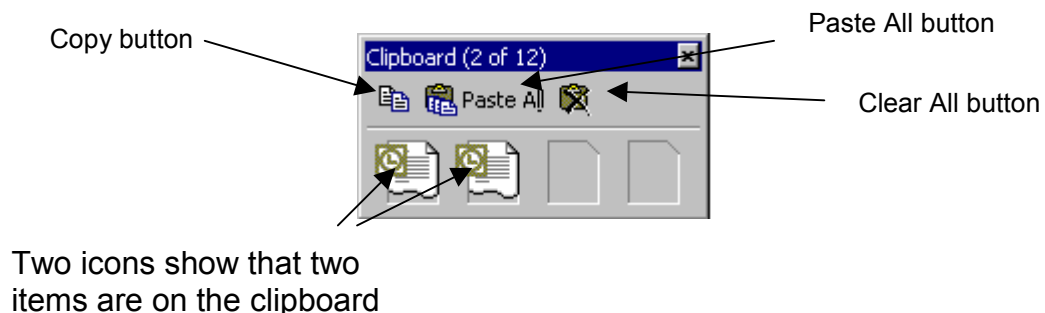
Copy Multiple Items onto Outlook's clipboard

When you are in Outlook you may copy or up to 12 separate items onto the clipboard. You may then paste the items separately into another messages or paste all the items together.

TO COPY MULTIPLE ITEMS TO THE CLIPBOARD

1. Select the first item you want to copy e.g. some text from a received message.
2. Select the **Copy** command in the usual way (Edit - Copy, CTR+C, or Copy button on the standard toolbar)
3. Select another item and use the Copy command again.

Unlike other packages, such as Word97, Outlook will be able to place the second item onto its clipboard. At this stage the following toolbar appears.

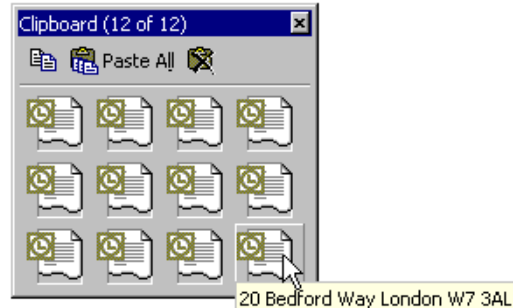


TIP

To call up the clipboard at any time if you wish to view it, select Toolbars from the View menu on the new message and then Clipboard.

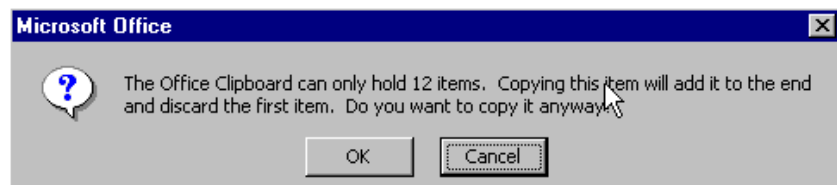
4. Once the Clipboard toolbar is in view you can use the **Copy** button on it to copy further items onto the clipboard.

The maximum number of items you can store on the clipboard is twelve. In order to identify what each icon is hover your mouse over each icon and the first few words of any copied or cut text will be shown like in the example opposite.



NOTE:

If you try to copy or cut more than twelve items you will get the following dialogue box.



Decide if you wish to have the first item replaced by the new item. If you are happy for this to happen you may click OK.

TO PASTE SEPARATE ITEMS

1. Position the I beam where you wish the item or text to be pasted.
2. Click on the appropriate icon on the clipboard representing the item you require

TO PASTE ALL ITEMS

1. Position the I beam where you wish all the items to be pasted.
2. Click on the **Paste All** button on the clipboard toolbar

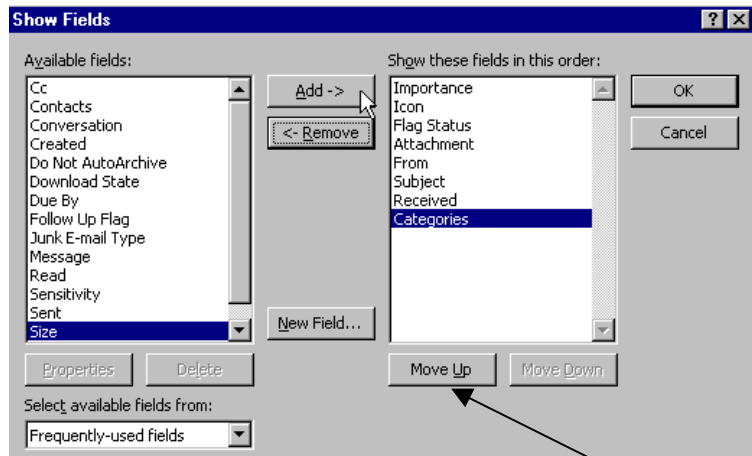
TO CLEAR THE CLIPBOARD

It is not possible to remove single items from the clipboard. The only option you have is to clear the clipboard of all items. To do this click on the **Clear All** button on the clipboard toolbar.

Customising Fields

You may wish to add or remove fields displayed above your message headers. One field which you may find useful is the message size field. To display this or any other field:

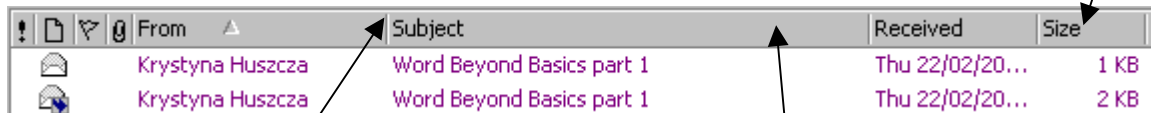
1. Right-click on any displayed field, such as From:, Subject
2. Select **Customize Current View**
3. Click on the **Fields** button and the Show Fields dialogue box should appear
4. Select any field you require from the list on the left, and then click the **Add** button to add it to the list on the right
5. When you have added all the fields you require click **OK**, and **OK** again.



TIP

You may wish to change the order of the fields by clicking on the **Move Up** or **Move Down** buttons. This determines the order the fields will be listed in.

Size field now displayed



TIP

If you wish to resize the width of any field point your mouse over the border between two fields. When a vertical line appears with two horizontal arrows click and drag to the desired size.

TIP

You may rearrange the order of the fields by clicking on the field name you wish to move and hold the mouse button down. Then drag the field horizontally to another position and let go of the mouse button

Organising Your Message Headers with Colours

You can set up Outlook to apply colours to certain message headers to make them stand out visually in your list. You need to select which colour you wish to apply and to which group of message headers, e.g. apply purple to all message headers for messages sent to you by a particular person. I find it useful to apply a colour to all messages arriving in my Inbox from myself.

Note:

It is not possible to apply a colour to a selected individual message header.

TO APPLY COLOUR TO ALL MESSAGES FROM THE SAME PERSON:

1. Open the Outlook folder which contains the messages you wish to colour
2. Either click on the **Organize** button on the toolbar or select **Organize** from the **Tools** menu to call up the following Organize pane
3. Click on the **Using Colours** option

4. Decide which group of messages you wish to apply a colour to, ie. any messages from a particular person.



Now click on a message header for a message you have received from that person and their name will appear in the appropriate box.

5. Select one of the 16 colours from the box on the right by clicking on the down arrow and clicking on your choice of colour
6. Click the **Apply Colour** button

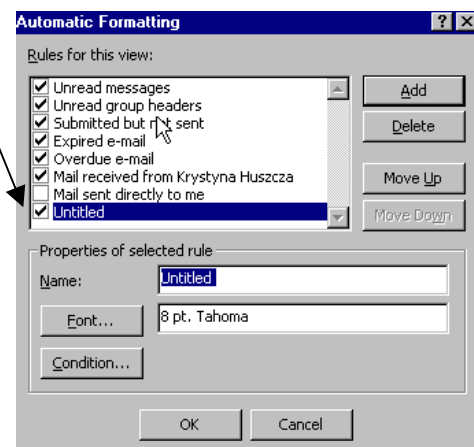
Now all the messages from the selected person are recoloured, and all new messages you receive from that person will also be recoloured.

7. Click on the X control button to close the Organize pane.

OPTIONS WITH AUTOMATIC FORMATTING

If you wish to be more specific about which messages are recoloured you need to use Automatic Formatting.

1. Follow steps 1 - 3 in the above section
2. Click on the Automatic Formatting option at the top right hand corner of the Organize pane and the Automatic Formatting dialogue box appears
3. Click on the **Add** button and an untitled rule will be added to the list
4. Type in a name for the rule
5. Click on the **Font** button and then select the various font attributes you require



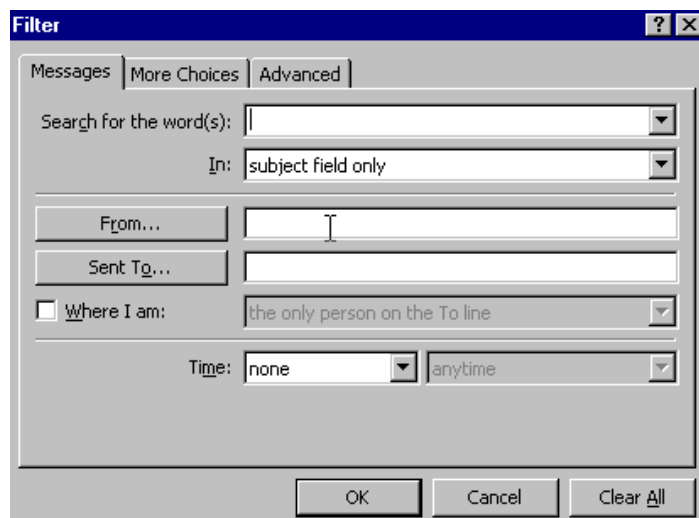
- Click on the **Condition** button and the Filter dialogue box will appear. Make your selections from the numerous choices and click **OK**.

NOTE:

There are two tabs with further choices.

NOTE:

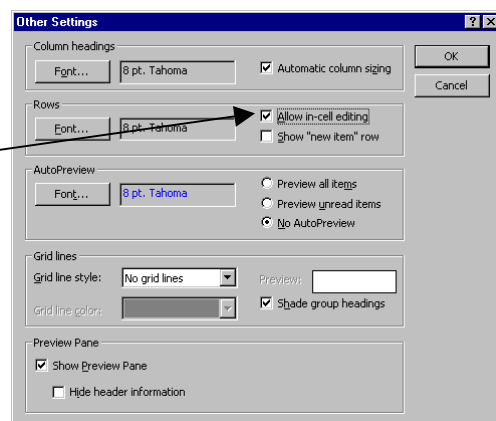
This dialogue box is very similar to the Advanced Find dialogue box



Editing Subject Text on Message Headers

Have you ever wished you could change the subject text on a message to make it easier for you to locate it in the future? With Outlook you are able to switch on 'allow in cell editing' and this lets you edit just the subject text but not the date received or from text.

- Right click on any field heading
- Select **Customise Current View**
- Click on the **Other Settings** Button and the dialogue box shown opposite will appear.
- Put a tick inside the 'Allow in-cell editing' checkbox.



Turning on the Automatic Spelling Checker

When the automatic spelling checker is switched on the spelling checker will be activated automatically whenever you click on the **Send** button.

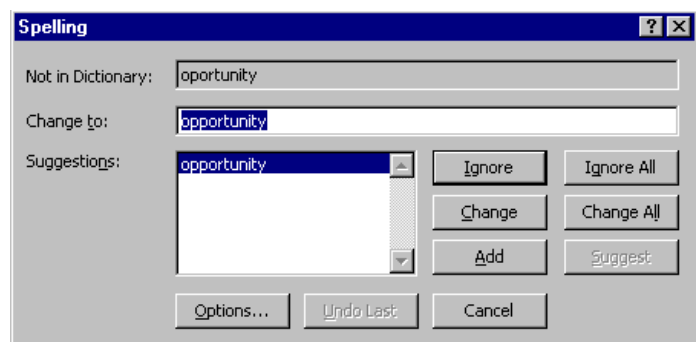
- Select **Options** from the **Tools** menu on the Outlook window
- Click on the **Spelling** tab

3. Put a tick in the *Always Check Spelling Before Sending* check box and have a look at all the other options which allow you to customise the spelling checker
4. Click **OK**



WHEN SENDING MESSAGES

Now when you type a new message and click on the **Send** button, if there are any spelling mistakes in the text the spelling checker will stop at the first incorrectly spelt word and the following dialogue box will appear:



This spelling checker works very much like any other spelling checker

TIP:

You may find the spelling checker frustrating to use at first for it will identify names you type in your message text as spelling mistakes. You can add them to your Outlook dictionary by clicking on the **Add** button in the dialogue box shown above when the name is identified as incorrectly spelt, or you may wish to edit the dictionary and put in many names in one go.

TO EDIT DICTIONARY

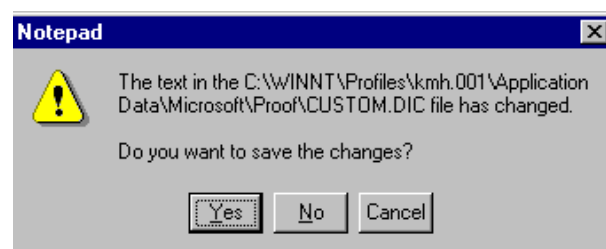
1. Select **Options** from the **Tools** menu on the outlook window
2. Click on the **Spelling** tab
3. Click on the **Edit** Button and a note pad file will appear similar to the one shown opposite.

Notice that there are already some entries in this file, such as numbers, your names and e-mail address.

4. You need to type in all the words you do not wish the spelling checker to pick up as incorrectly spelt words. E.g. names, abbreviations, terminology.



5. When you have finished typing close the notepad file and say **Yes** when asked if you wish to save the changes:



TIP:

If you wish to see red wavy lines appear under all incorrectly spelt words as you type you should set up Microsoft Word to be your text editor (see the *Outlook Intermediate - Part 1* handout)

Sending a Document as an Attachment from Microsoft Word

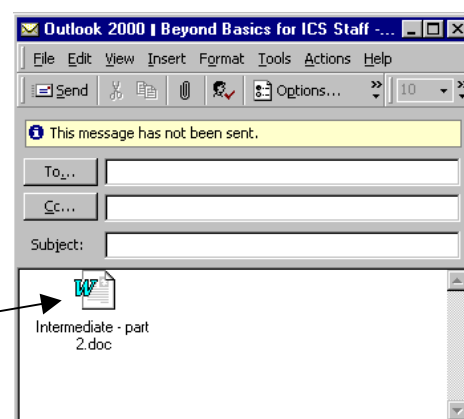
If you have just typed something in Word and wish to send it to someone as an attachment, you can do it directly from Word without having to go into Outlook

1. Open Microsoft Word and type the document or open an existing Word document which you wish to send
2. Select **Sent To** from the **File** menu
3. Select **Mail Recipient**
4. A dialogue box appears like the one shown opposite.

Address the new message window or Click on the **To:** button to access the Global Address book or your Contacts.

5. Click on **Send** button

The current Word document is now an attachment on this message window



Printing Multiple Messages to Run Continuously on Paper

If you need to print several e-mail messages and are happy for them to run on one after the other (and save on paper).

1. Open the folder where the messages you wish to print are located
2. Use Shift Click or Control Click to select more than one message
3. Click the **Print** button on the toolbar

Attachments using Drag and Drop

Another way to attach a file to a message is to locate the file in My Computer or Explorer, click on it and hold the mouse button down, then drag and drop it over a new message window. A copy of the file is now attached to the message. To make this work you will need to resize and reposition the Outlook Window so you can see both the new message window and the file at the same time.