



# Outlook 2007 Advanced

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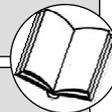
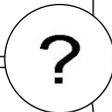
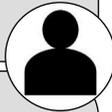
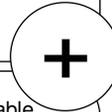


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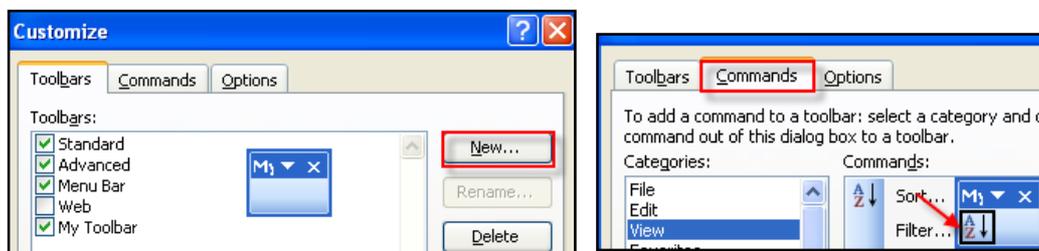
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# UNIT 1

## Customising Outlook

You can customise the way your screen looks by **creating your own toolbars** and placing buttons on them. To create your own toolbars go to **Tools / Customise**, and use the **toolbars tab** to create a toolbar as shown. The **commands tab** shows the different categories, which contain everything you would find in the pull down menus as well as some extra icons. Once you find a button you want you can drag the button from the commands section onto your toolbar.

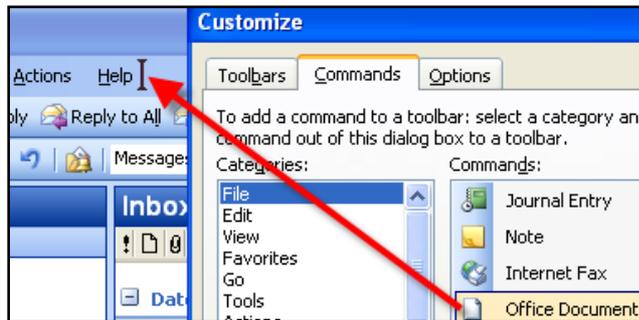
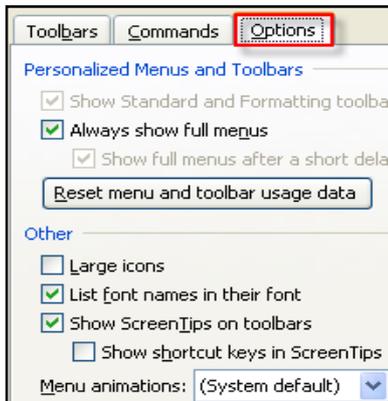


You can drag icons onto your menu bar rather than a toolbar. The picture above shows one called Office Document being dragged to the toolbar. This particular button when clicked brings up a box asking if you want to create an Excel Spreadsheet, Word Document or PowerPoint Presentation.

The **Options tab** allows you to change how your screen appears with the Large Icons option ideal for people whose eyesight is not so good.

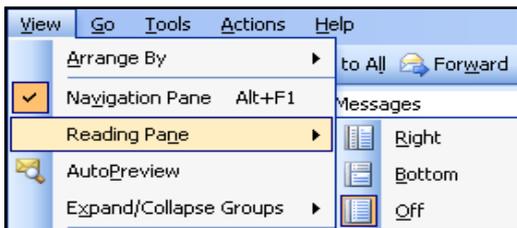
The other option you might want to change would be Always show full menus, this is usually turned off when you first use excel as is the option above Show Standard and Formatting toolbars on two rows. Always have the toolbars on two rows as you get all available buttons.

The Always show full menus relates to the  button which appears when you go into the menus, as you do not see all related items. When you click the  button it then shows you all the items. When you select Always show full menus you always see everything all the time.



## Using the Reading Pane

The **reading pane** adds a window to the right or bottom of your screen allowing you to see the content of your message without opening it up. The other option is not to have the reading pane on.

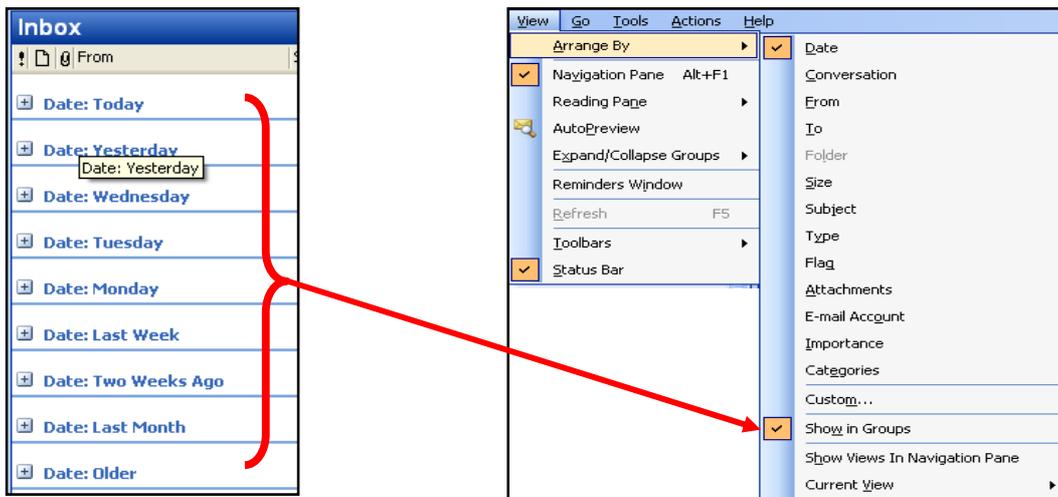


## Customising View Settings

Views can be very important for **organising how you see a folder**. The default for all folders is that it is arranged by date with the grouping turned on, as shown above. If you want to change the view you can either go to

**View / Arrange by** and choose or click on the  field headings in the folder.

If you want to **turn off the grouping** then you can by going to **View / Arrange by / Show in Groups**, when you select this option it removes the tick and turns off grouping.



If you right click on the  you can Expand and collapse all sections quickly

## UNIT 2

### Messages

#### Find a message or item by using Instant Search

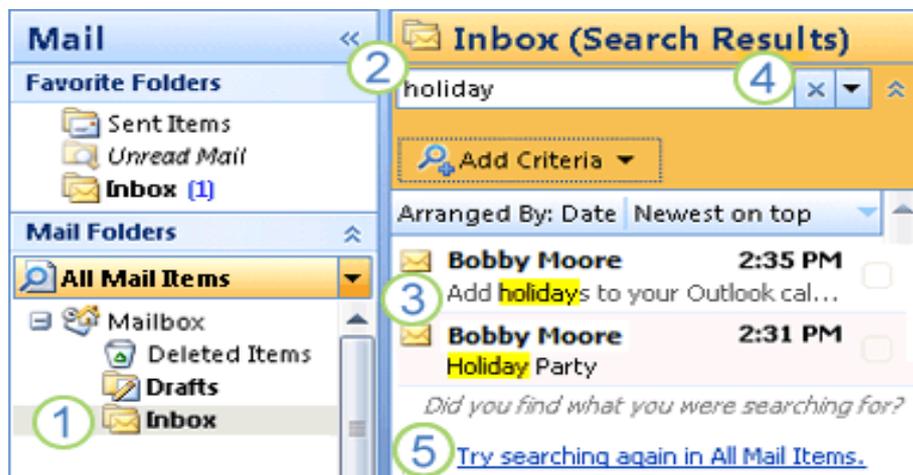
Instant Search helps you to **quickly find items** in Microsoft Office Outlook 2007. The Instant Search pane is always available in all of your Outlook views, such as Mail, Calendar, and Contacts.

1. In **Mail**, click the **folder** that you want to **search**.
2. In the **Instant Search box**, type your **search text**.
  - Messages that contain the text that you typed are displayed in the Instant Search Results pane with the search text highlighted.

**Note** By default, it is not necessary to click the Search button  to start the search. The Search button is enabled only if you have cleared the Display search results as I type when possible check box in the Search Options dialog box (Tools menu, Instant Search, Search Options)

- To narrow your search, type more characters.
3. To **widen your search** to include all folders in Mail, at the end of the search results, click **Try searching again in All Mail Items**.

Alternatively, in the **Navigation Pane** under **Mail Folders**, click **All Mail Items** or press **CTRL+ALT+A**.

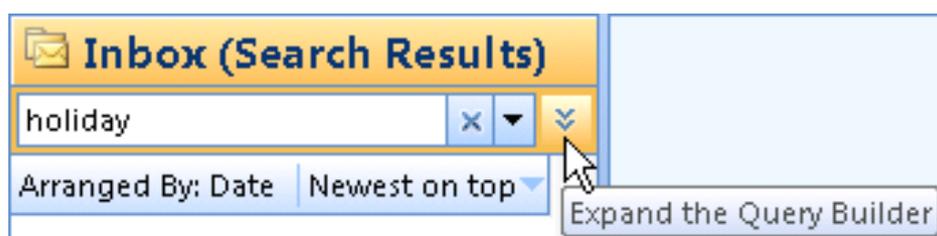


- 1 Click the folder to search in.
- 2 Type your search text in the Instant Search box.
- 3 Messages that contain the text that you type appear in the results with search text highlighted.
- 4 Click to clear the Instant Search box, and then start a new search.
- 5 Click to widen your search to all folders in Mail.

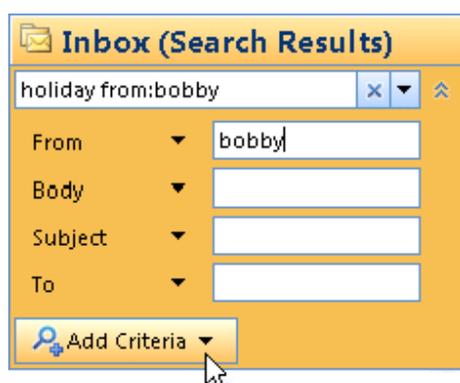
## Add more search criteria

You can **narrow your search by adding criteria**.

1. In the Instant Search pane, click **Expand the Query Builder**.



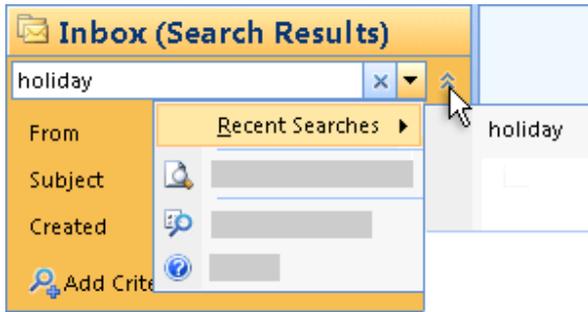
2. To add more search criteria, **type your search text** in the **From**, **Body**, **Subject**, or **To** lines.



## Reuse a recent search

Outlook displays up to 10 of your most recent searches.

In the Instant Search pane, click **Show Instant Search Pane Menu**, point to **Recent Searches**, and then click the search that you want in the list.



## Include subfolders in Instant Search

1. On the **Tools menu**, point to **Instant Search**, and then click **Search Options**.
2. You can also click the **arrow** in the **Instant Search pane**, and then click **Search Options**.
3. Under Instant Search Pane, select **All folders**.

## Creating search folders

A **Search Folder** is a virtual folder that provides a view of all e-mail items that match specific search criteria. For example, the Unread Mail Search Folder allows you to view all unread messages from one location even though the messages may be located in different Mail folders.

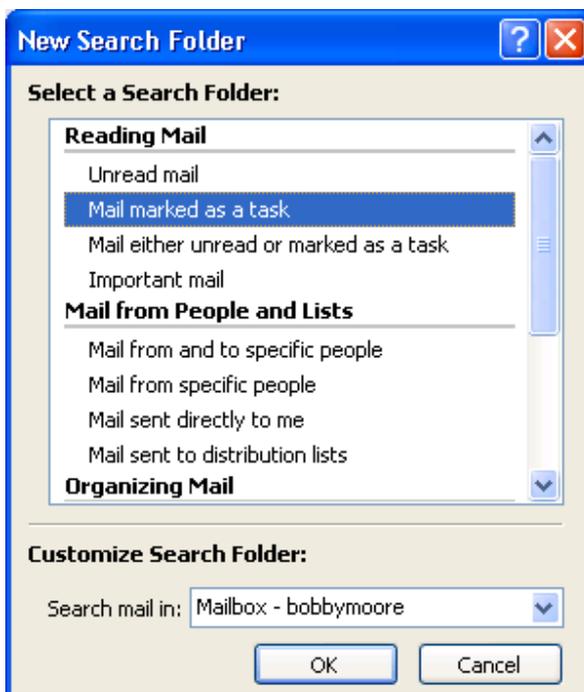
## Default Search Folders

There are **three default Search Folders**

- **Categorised Mail** includes items that have been assigned a color category.
- **Large Mail** includes items that are larger than 100 kilobytes (KB).
- **Unread Mail** includes items that are marked as unread.



In addition to the default Search Folders, Outlook includes a **list of predefined Search Folders**. You can customize a predefined Search Folder with your own search criteria.



You can also **create your own custom Search Folder** by defining specific search criteria that e-mail messages must meet to be displayed in the Search Folder.

**Note** Search Folders in Microsoft Office Outlook 2007 support prefix matching in the text strings that you specify. For example, if you want to include all messages with the word "rain" in the Search Folder, the Search Folder will also include messages with words like "raining" or "rainy" but won't include words like "brain".

**Important** When you delete a Search Folder, the e-mail messages shown in the Search Folder are not deleted from their original locations, because those items are only viewed in a Search Folder. However, if you open or select one or more e-mail messages shown in a Search Folder and then delete them, the messages will be deleted from the Outlook folders where they were stored.

## Add a predefined Search Folder

1. In **Mail**, on the **File menu**, point to **New**, and then click **Search Folder**.

**Tip** To open the New Search Folder dialog box, press **CTRL+SHIFT+P**.

2. Click a **predefined Search Folder**.
3. If prompted, under **Customize Search Folder**, specify the **search criteria** to use.
4. To select a **different mailbox** to search, under **Customize Search Folder**, click the **arrow**, and then **select the mailbox** from the list.

**Tip** To **change the criteria** for a Search Folder, right-click the folder, click **Customize this Search Folder**, click **Criteria**, and then change the criteria. The criteria of Search Folders in the Reading Mail group cannot be changed.

## Create a custom Search Folder

1. In **Mail**, on the **File menu**, point to **New**, and then click **Search Folder**.

**Tip** To open the New Search Folder dialog box, press **CTRL+SHIFT+P**.

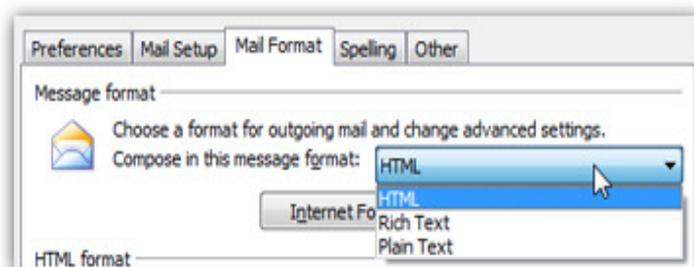
2. Click **Create a custom Search Folder**.
3. Under **Customize Search Folder**, click **Choose**.
4. Type a **name** for your custom Search Folder.
5. Click **Criteria**, select the **options** that you want, and then click **OK**.
6. Click **Browse**, select the **folders** that you want to be searched, and then click **OK** three times.



- 1 Click to create a custom Search Folder.
- 2 Click to open the Custom Search Folder dialog box.
- 3 Click to name your Search Folder.
- 4 Click to specify the search criteria

## Customising Messages

### Switch from plain text emails to rich text or HTML



To check your text formatting and font settings, go to **Tools > Options**, and click on the **Mail Format** tab. In order to be able to change font and customize text formatting in emails, the **Compose in this message format** should either say "HTML" or "Rich Text"; if it says "Plain Text", change it to "HTML".

## Difference Between Message Formats

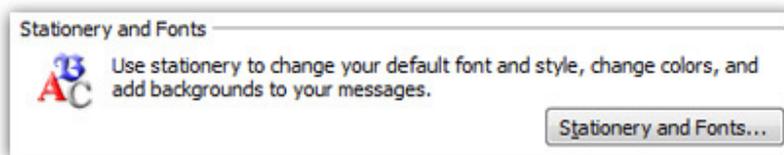
1. **Plain text** This is a format that all e-mail applications support. You can set Outlook to open messages that you receive in plain text format only. Plain text doesn't support bold, italic, colored fonts, or other text formatting.

It also doesn't support pictures that are displayed directly in the message body, although you can include the pictures as attachments.

2. **Outlook Rich Text format (RTF)** You can use RTF when sending messages within an organisation that uses Microsoft Exchange; however, we recommend that you use the HTML format. RTF supports text formatting, including bullets, alignment, and linked objects. Outlook automatically converts RTF formatted messages to HTML by default when you send them to an Internet recipient
3. **HTML** This is the default message format in Outlook. It is also the best format to use when you want to create messages that are similar to traditional documents, with various fonts, colors, and bullet lists. By default, when you select either of the options that allow formatting (HTML or Rich Text), the message is sent in HTML format. So when you use HTML, you know that what you send is what the recipient will see.

## Change your global email font settings in Outlook 2007

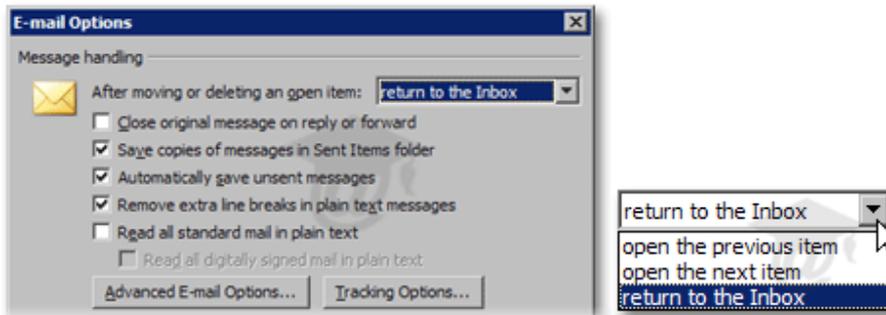
Go to **Tools > Options**, and select the **Mail Format** tab in the dialog that opened. Then, click on the **Stationery and Fonts** button.



## Message Handling Options in Outlook

To access the **generic Outlook email** options go to **Tools > Options** from Outlook's main window.

Click **E-mail Options** from the **Option's** dialog **Preferences** tab.



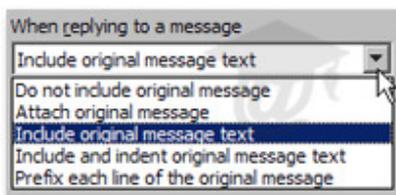
## Plain Text Email Options in Outlook 2007

The **Remove extra line breaks in plain text messages** checkbox (checked by default) automatically eliminates blank lines in plain text messages.

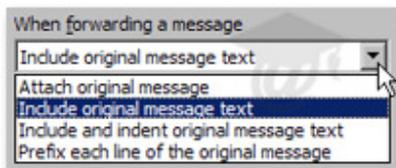
By default, Outlook uses rich format in emails: bold, italic, and underlined text, as well as colors.

The **Read all standard mail in plain text** checkbox forces Outlook 2007 to display all messages in plain text: graphic and formatting becomes invisible, and only line returns are retained.

## On Replies and Forwards in Outlook



The **When replying to a message** drop-down menu allows you to **customise** how Outlook 2007 behaves when you **reply** to an email.

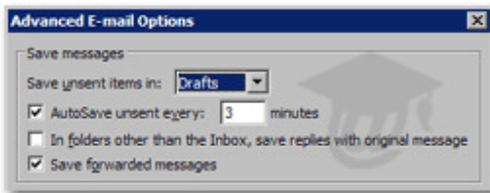


The **When forwarding a message** drop-down menu defines how Outlook 2007 will **handle forwarded emails**.

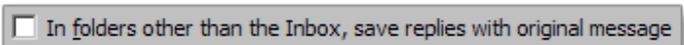
## Advanced E-mail Options

### "Save messages" Options

By default all unsent emails in the Drafts folder.

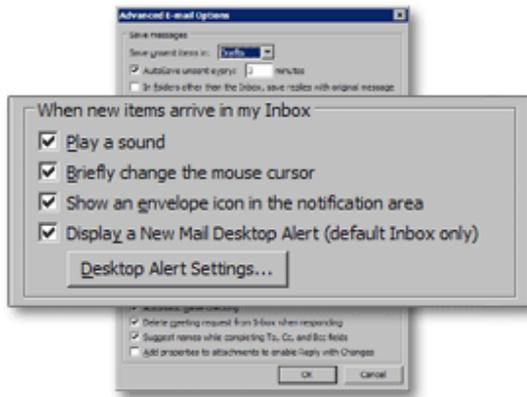


By default, Outlook 2007 **automatically saves** all unsent emails for you **every three minutes**.



Check it to instruct Outlook 2007 to save a copy of the email you are replying to in the same folder as the email you are replying to.

## "When new items arrive in my inbox"



## Change the Message Format for All Messages

You can configure Outlook so that **all new e-mail messages** use the message format of your choice.

1. On the **Tools** menu, click **Options**, and then click the **Mail Format** tab.
2. In the **Compose in this message** format list, click the **format** that you want.

## Change the message format for all messages sent to a specified Internet recipient

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

**Note** You can change the format for only the messages sent to a contact with an SMTP e-mail address. An SMTP e-mail address contains the @ symbol — for example, barbara@contoso.com. If you are using an Exchange account and sending to another person in your organization who is also using an Exchange account, this feature is not available.

## Change the Message Format for One Message

1. Create a **new message**.
2. With the message open, on the **Message Options tab**, in the **Format group**, click the **format** that you want to use (Plain Text, HTML, or Rich Text).

## UNIT 3

### The Inbox

#### Notify Others That You Will Be Out of the Office

Using Outlook, you can set up your mailbox so that those who try to reach you are kept informed of your absence, and more importantly, of when you will return.

#### The Out Of Office Assistant

**The Out Of Office Assistant automatically sends a standard reply to your incoming messages while you are out of the office.** Additionally, you can set **rules** that perform various actions based on a specified set of conditions.

#### Rules

Rules are **instructions** that you specify for how something is to be handled by Outlook.

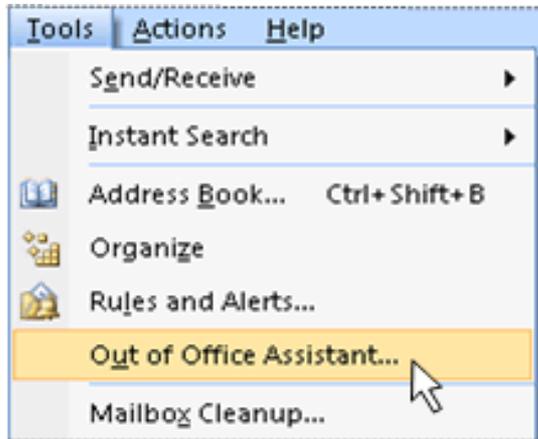
Some examples of the conditions and actions that make up an Out Of Office Assistant rule are shown in the following table.

Condition	Action
Messages received from a specified key client...	Forward mail to assistant.
Messages about a current project...	Forward mail to manager.
A routine daily update from a specified company...	Delete the mail.
About a specified project...	Move message to the project folder.

**Important** The Out of Office Assistant command only appears on the Tools menu when you are using a Microsoft Exchange Server account.

## Turn On or Off The Out Of Office Assistant

1. On the **Tools** menu, click **Out of Office Assistant**.



## Use Rules with The Out Of Office Assistant

If you are not going to check e-mail messages while you are out of the office, use the Out of Office Assistant with rules to automatically manage incoming messages by specifying what action Outlook should take with them. For example, you can create rules to automatically move or copy messages to other folders, to delete messages, to send custom replies, and so on.

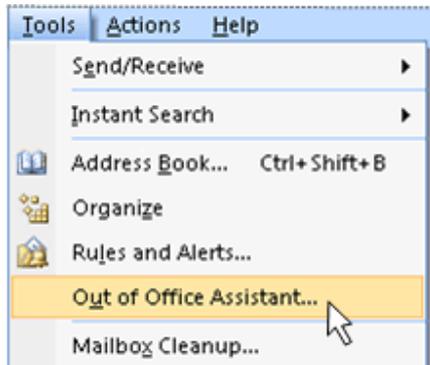
If you create rules, it is important to understand how they are applied in Outlook:

Rules are applied in the order in which they appear from top to bottom in the list of rules.

If you select more than one condition in the Edit Rule dialog box, the rule will be applied only to messages that meet all of the selected conditions. For example, if you specify Judy Lew as the sender (condition) and "Marketing Meeting" (condition) in the Subject box, the rule is applied only to messages that meet both conditions.

However, if you set multiple criteria for a single condition, the rule will be applied to any message that meets at least one criterion for that condition. For example, if you specify "Judy Lew;Frank Lee" in the From box, the rule is applied to messages from either Judy Lew or Frank Lee.

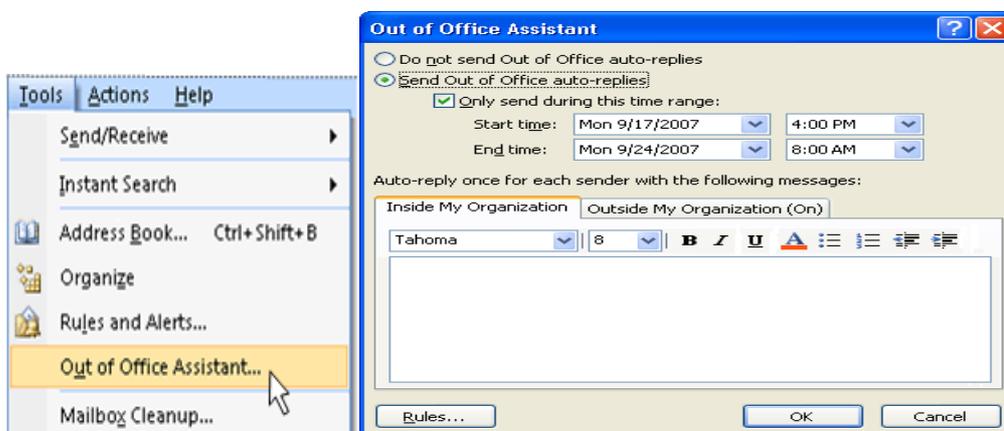
1. On the **Tools** menu, click **Out of Office Assistant**

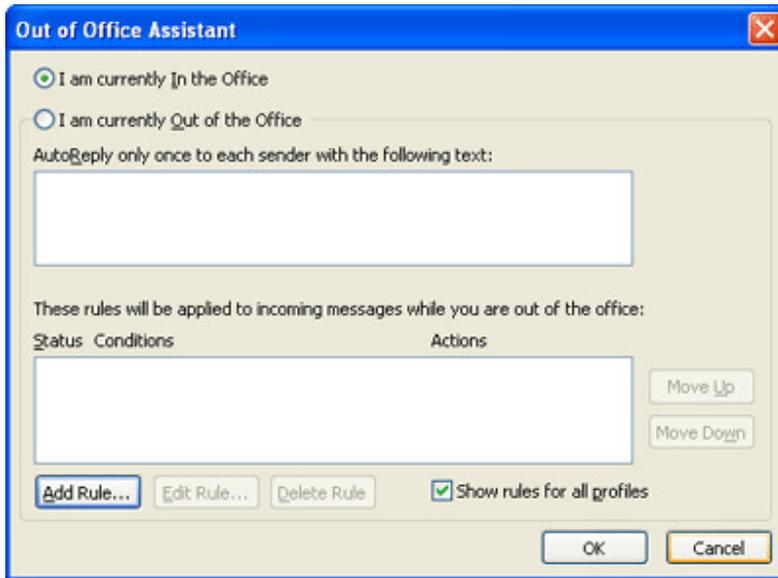


**Note** The Tools menu appears on the main Outlook window. The Tools menu is not available in windows where you create or view items such as e-mail messages, contacts, or tasks

2. Click **Rules**.
3. Under **When a message arrives that meets the following conditions**, specify the conditions that the message must meet for the rule to be applied.
4. If you want to **specify more conditions**, click **Advanced**, select the options that you want, and then click OK.
5. If you want to specify that this rule must be applied last, select the Do not process subsequent rules check box.
6. Under **Perform these actions**, select the **actions** that you want. You can select more than one action.

**Note** If you specify that a message must be deleted, rules that follow the delete rule in the list of rules in the Out of Office Assistant dialog box do not affect the message.





## Organise Messages with Rules

Rules help you manage your e-mail messages by performing actions on messages that match a specific set of conditions. After you create a rule, Microsoft Outlook applies the rule when a message arrives in your Inbox or when you send a message. For example, you can automatically:

- Forward to your manager all messages sent by Judy Lew when they arrive in your Inbox.
- Assign the category Sales to all messages you send that have the word "sales" in the Subject box.
- Flag each meeting request or meeting update you receive from your manager.

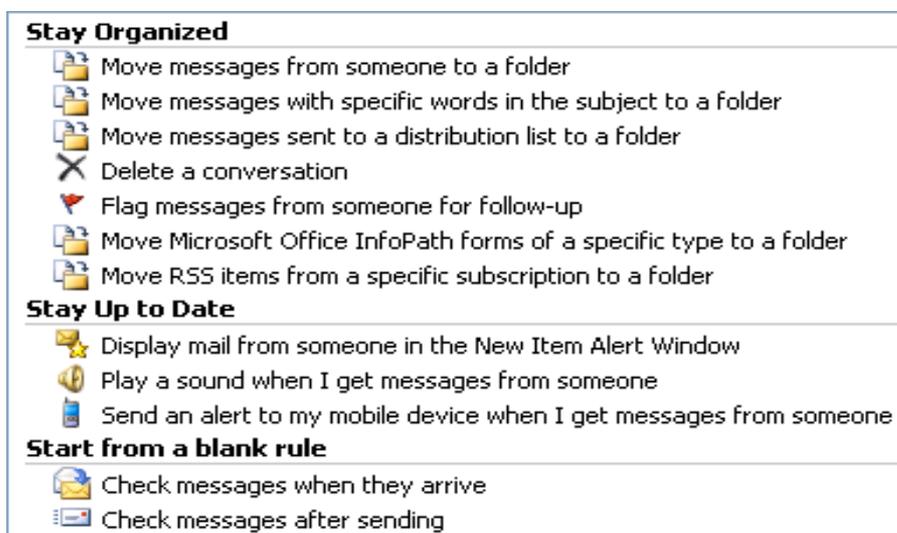
## How rules help you manage messages

Rules fall into one of two general categories: organization and notification. The Rules and Alerts Wizard contains templates for the most commonly used rules.

- **Stay organized** These are rules that help you to file and follow up on messages. For example, you can create a rule for messages from a specific sender, such as Bobby Moore, with the word "sales" in the Subject line, to be

flagged for follow-up, categorized as Sales, and moved to a folder called Bobby's Sales.

- **Stay up-to-date** These are rules that notify you in some way when you receive a particular message. For example, you can create a rule that automatically sends an alert to your mobile telephone when you receive a message from a family member.
- **Start from a blank rule** These are rules that you create from scratch.



## Exceptions

You can add exceptions to your rules for special circumstances, such as when a message is flagged for follow-up action or is marked with high importance. A rule is not applied to a message if even one of the exceptions that you specify is met

## Create a rule from a template

1. In the **Navigation Pane** click **Mail**.
2. On the **Tools menu**, click **Rules and Alerts**.
3. If you have more than one e-mail account, in the Apply changes to this folder list, select the **Inbox** that you want.

4. Click **New Rule**.
5. Under **Step 1**: Select a **template**, select the template that you want from the Stay Organized or Stay Up to Date collection of templates.
6. Under **Step 2: Edit the rule description**, click an underlined value. For example, if you click the people or distribution list link, the Address Book opens.
7. Under **Step 1**: Select **condition(s)**, select the conditions that you want the messages to meet for the rule to apply.
8. Under **Step 2: Edit the rule description**, click an underlined value if you have not done so already, and then click Next.
9. Under **Step 1**: Select **action(s)**, select the action that you want the rule to take when the specified conditions are met.
10. Under **Step 2: Edit the rule description**, click an underlined value if you have not done so already, and then click Next.
11. Under **Step 1**: Select **exception(s)**, select any exceptions to the rule, and then click Next.
12. To **finish creating the rule**, enter a **name** for the rule, and then select any other **options** that you want.
  - If you want to run this rule on messages that already are in one of your folders, select the **Run this rule now on messages already in "folder" check box**.
  - To apply this rule to **all your e-mail accounts** and the **Inbox** associated with each account, select the **Create this rule on all accounts check box**.
13. Click **Finish**.

## Create a rule from scratch

To create a rule by choosing your own conditions, actions, and exceptions, do the following:

1. In the **Navigation Pane** click **Mail**.
2. On the **Tools menu**, click **Rules and Alerts**.
3. If you have more than one e-mail account, in the Apply changes to this folder list, select the Inbox that you want.
4. Click **New Rule**.
5. Under **Start from a blank rule**, select either **Check messages when they arrive** or **Check messages after sending**, and then click **Next**.
6. Under **Step 1: Select condition(s)**, select the conditions that you want the messages to meet for the rule to apply.
7. Under **Step 2: Edit the rule description**, click an underlined value if you have not done so already, and then click **Next**.
8. Under **Step 1: Select action(s)**, select the action that you want the rule to take when the specified conditions are met.
9. Under **Step 2: Edit the rule description**, click an underlined value if you have not done so already, and then click **Next**.
10. Under **Step 1: Select exception(s)**, select any exceptions to the rule, and then click **Next**.
11. To **finish** creating the rule, enter a **name** for the rule, and then select any other **options** that you want.
  - If you want to run this rule on messages that already are in one of your folders, select the **Run this rule now** on messages already in "folder" check box.
  - To apply this rule to all your e-mail accounts and the Inbox associated with each account, select the **Create this rule on all accounts** check box.
12. Click **Finish**.

## Run a rule periodically but not all the time

1. On the **Tools** menu, click **Rules and Alerts**.
2. In the Rules and Alerts dialog box, **turn the rule off** by clearing the check box next to the rule.
3. Click **Run Rules Now**.
4. In the Run Rules Now dialog box, under **Select rules to run**, select the check box next to the rule that you want to run.
5. Select the **folder** that you want to apply the rule to.
6. Select the **category** of messages that you want to apply the rule to.
7. For example, you can apply the rule only to unread messages in a folder.
8. Click **Run Now**.

## Forwarding messages outside your organization

If you work in an organization that uses Exchange, by default, messages you forward to external e-mail addresses outside your organization using a rule will not be sent. This setting is to help prevent corporate data from being disclosed and is controlled by your Exchange administrator.

## Automatically Reply To Messages

If you use a Microsoft Exchange Server 2007 account, you should use the Out of Office Assistant.

**Without an Exchange Server account, you can combine an Outlook e-mail template with Outlook rules to reproduce the functionality of the Out of Office Assistant available only to Exchange Server account users.** By using this combination, you can use your e-mail account to send automated replies to incoming messages

## Step 1: Create a message template

**Tip** Download a formal or informal out of office message template from Microsoft Office Online.

1. On the **File menu**, point to **New**, and then click **Mail Message**.
2. On the **Options tab**, in the **Format** group, click **Plain Text**.
3. In the message body, **type the message** that you want to send as your automated reply.
4. In the message window, click the **Microsoft Office Button**  and then click **Save As**.
5. In the Save As dialog box, in the **Save as type** list, click **Outlook Template (\*.oft)**.
6. In the **File name** box, type a name for your message template, and then click **Save**.

## Step 2: Create a rule to automatically reply to new e-mail messages

**Do one of the following:**

1. On the **Tools menu**, click **Rules and Alerts**.
2. In the Rules and Alerts dialog box, click **New Rule**.
3. Under **Start from a blank rule**, click **Check messages when they arrive**, and then click **Next**.
4. Under **Which condition(s) do you want to check?**, select the **sent only to me** check box and any other criteria that you want, and then click **Next**.
5. When you see a dialog box informing you that this rule will be applied to every message that you receive, click **Yes**.
6. Under **What do you want to do with the message?**, select **the reply using a specific template** check box.
7. Under **Step 2: Edit the rule description** (click an underlined value), click a specific template.

8. In the **Select a Reply Template** dialog box, in the **Look In box**, click **User Templates in File System**.
9. **Select the template** that you created in the previous section, and then click **Open**.
10. Click **Next**.
11. Optionally, select the check boxes for any exceptions to the auto-reply rule.
12. Click **Next**.
13. Under **Step 1: Specify a name** for this rule, type a name for the auto-reply rule, and then click **Finish**.

**Tip** Consider creating an Outlook task or to-do reminder to help you remember to turn off this rule when you want to stop sending automatic replies.

The reply using a specific template rule in the Rules Wizard sends your automated reply only once to each sender during a single session. This rule prevents Outlook from sending repetitive replies to a single sender from whom you receive multiple messages. During a session, Outlook keeps track of the list of users to whom it has responded. If you exit Outlook and then restart it, however, the list of the senders who have received automated replies is reset.

**Important** For the Rules Wizard to send a reply automatically, Outlook must be running and configured to check periodically for new messages.

## Turn off automatic replies

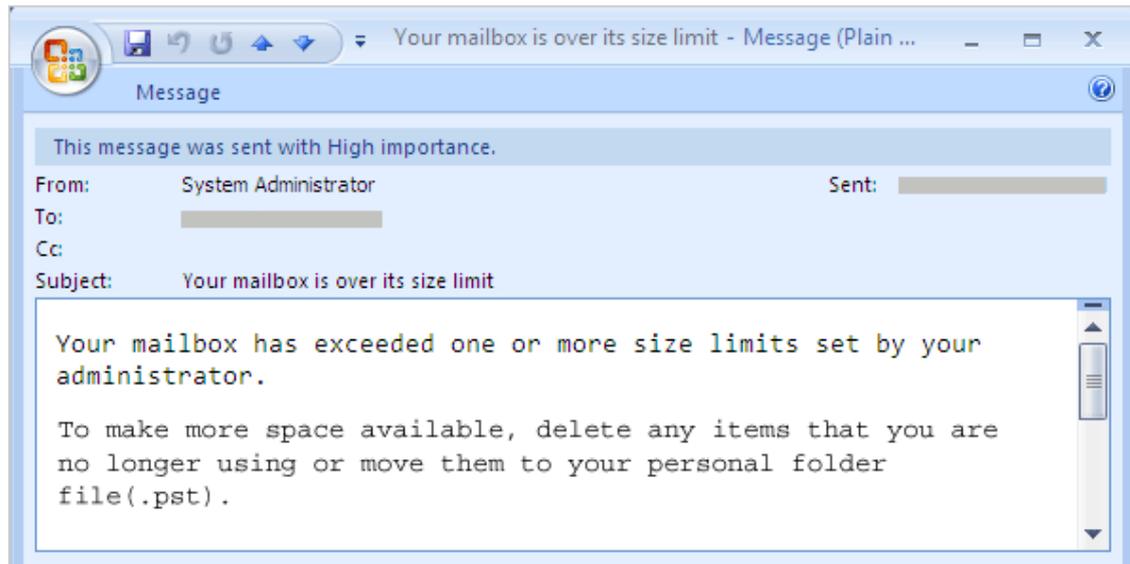
To turn off the rule you created in step 2 above, do the following:

1. On the **Tools menu**, click **Rules and Alerts**.
2. On the **E-mail Rules tab**, under **Name**, clear the check box for the rule you want to turn off.

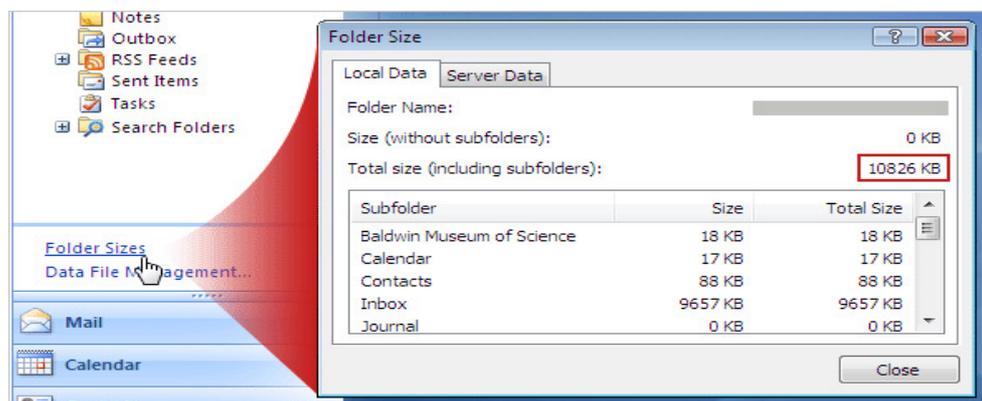
## MailBox Cleanup (I)

Battle mailbox size by learning how to manage your Microsoft Outlook 2007 Mailbox and keep it within a specific size limitation.

### Is your mailbox getting too big?



### See your mailbox size

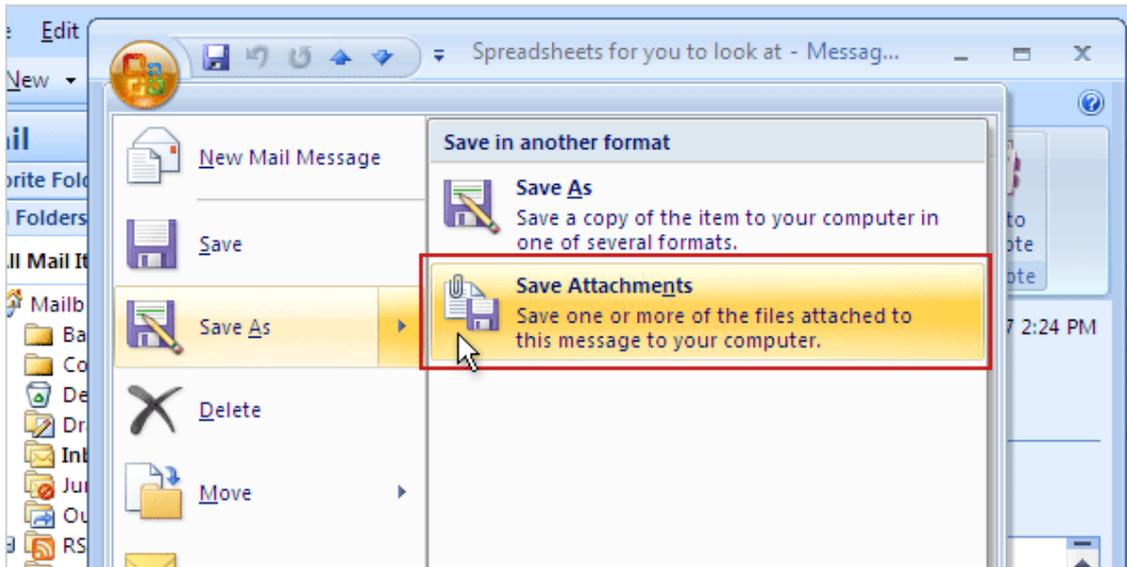


### Find the large messages

If your goal is to reduce the overall size of your mailbox or of a specific folder in your mailbox, one strategy is to read and respond to messages, and then file or delete them based on their sizes. To achieve this goal, you can use Outlook to monitor individual message sizes. For example, you can sort your messages so

that they appear in order from largest to smallest. If you want to know the exact size of each of the large messages in your Mailbox, you can see that by displaying the messages in Table view.

## Save attachments outside your e-mail



Once you start looking at size, you'll notice that the bigger messages are often those that include attachments.

Once you've saved the attachment, you can delete the message (if you don't need it anymore).

## Empty the Deleted Items folder



1. **Tidy automatically:** Click **Options** on the **Tools menu** in the main Outlook window. On the **Other tab**, select the **Empty the Deleted Items folder upon exiting** check box. Your mailbox will be trimmer in no time.
2. **Tidy manually:** If you prefer to have more control over when items are dumped from Deleted Items, you can empty the folder anytime you like with a simple **right click**.

## Take steps to avoid junk



- Use the **Junk E-mail Filter** and send junk where it belongs, the **Junk E-mail folder**.
- Don't respond to junk messages or chain letters.
- Take care before you click a link within this type of e-mail that says something such as, "Click here to remove yourself from this mailing list."

## How the Junk E-mail Filter works

The **Junk E-mail Filter evaluates each incoming message** to assess whether it may be spam, based on several factors. These can include the time when the message was sent and the content of the message. **By default, the Junk E-mail Filter is turned on and the protection level is set to Low.** This level catches only the most obvious spam. You can make the filter more aggressive by changing the level of protection. Also, the Junk E-mail Filter can be updated periodically to protect against the latest techniques that spammers use to spam your Inbox.

**Tip** You can control many of your Junk E-mail Filter settings with the Junk E-mail Options dialog box. From your Inbox, in the Actions menu, point to Junk E-mail and then click Junk E-mail Options.

## Junk E-mail Filter Lists

Even though the Junk E-mail Filter filters your incoming messages automatically, the **Junk E-mail Filter Lists enable you more control over what is or is not considered spam**. These lists enable you to allow messages from sources that you trust, or block messages that arrive from specific e-mail addresses and domains that you don't know or trust.

### There are five Junk E-mail Filter lists

- 
- **Safe Senders List**
  - **Safe Recipients List**
  - **Blocked Senders List**
  - **International - Blocked Top-Level Domains List**
  - **International - Blocked Encodings List**

### Safe Senders List

- If the filter mistakenly marks an e-mail message as a junk e-mail message, you can add the sender of that message to the Safe Senders List. You can also manually build your Safe Senders list in the Junk E-mail Options dialog box. E-mail addresses and domain names in the Safe Senders List are never treated as junk e-mail, regardless of the content of the message.
- All of the e-mail addresses in your **Contacts are included in this list** if the **Also trust e-mail from my Contacts** check box in Junk E-mail Options is selected (the default setting).
- E-mail addresses of people who are not listed in your Contacts but with whom you correspond are included in this list if you select the **Automatically**

add people I e-mail to the Safe Senders List check box. (This check box is not selected by default.)

- A recipient's e-mail address is saved in the list by default only when you create and send a message manually in Outlook, instead of the message being generated automatically by a program.
- Personal distribution lists cannot be added by using this check box.

If you accidentally reply to a spammer's e-mail message (for example, by sending a request to unsubscribe from the spammer's mailing list) while this check box is selected, that spammer's e-mail address will be added to the Safe Senders List. If you later notice the spammer's messages in your Inbox, you must add the spammer's e-mail address to the Blocked Senders List and remove the corresponding entry from the Safe Senders List. If the same address appears in both the Blocked Senders List and the Safe Senders List, the Safe Senders List takes precedence, and the address will not be considered unsafe.

If you use an Exchange account (used more often in business settings than for home or personal e-mail), all names and e-mail addresses in the Global Address Book are automatically considered safe.

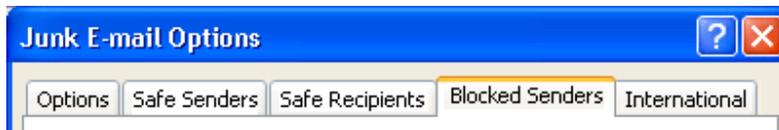
You can also configure Outlook so that it accepts messages only from people in your Safe Senders List. This configuration is in a click-box in the Options tab in Junk E-mail Options

## Safe Recipients List



If you belong to a mailing list or a distribution list, you can add the list sender to the Safe Recipients List. Messages sent to these e-mail addresses or domain names are never treated as junk, regardless of the content of the message.

## Blocked Senders List



You can easily block messages from particular senders by adding their e-mail addresses or domain names to the Blocked Senders List. When you add a name or e-mail address to this list, Outlook moves any incoming message from that source to the Junk E-mail folder. Messages from people or domain names that appear in this list are always treated as junk, regardless of the content of the message.

If you have existing lists of safe or blocked names and addresses, you can import them into Outlook.

You can add a message sender or recipient to any Junk E-mail Filter list by right-clicking the message in your Inbox or other mail folder, pointing to Junk E-mail, and clicking on the desired option.

## International - Blocked Top-Level Domains List

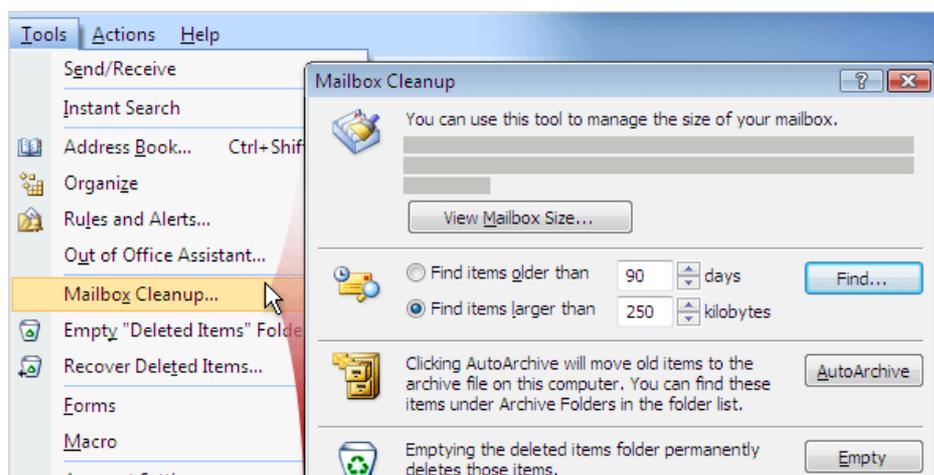


To block unwanted e-mail messages that appear in another language, you can add encodings to the Blocked Encodings List.

This list enables you to block all e-mail addresses in a specified language encoding (encoding: A method for representing characters in HTML or plain-text e-mail messages, examples include US-ASCII, Unicode (UTF-8), and Western

European (ISO). Outlook automatically selects an optimal encoding for outgoing e-mail messages.), also known as a character set. Today, most junk e-mail is sent in US-ASCII encoding. The remainder is sent in various other international encodings. The Blocked Encodings List lets you filter out unwanted international e-mail that is displayed in languages that you don't understand.

## One-stop cleanup with Mailbox Cleanup



We've mentioned a few strategies for learning the size of your mailbox and for seeing the sizes of the messages inside it. We've also suggested some ways of moving or removing messages to reduce the overall size of your mailbox. Wish you could find all of these things in one place? Look no more. It's called **Mailbox Cleanup**, and you can get to it from the **Tools menu** in the main Outlook window.

You can click Mailbox Cleanup to start finding and dealing with e-mail messages in ways that will now be familiar to you. When you need to clean up your mailbox, Mailbox Cleanup is a good place to go.

## MailBox Cleanup (II)

Suppose you want to reduce the size of your mailbox by **storing e-mail messages on your own computer (instead of keeping them on an e-mail server, for example)**. Or maybe you just want to move some messages related

to an important project from one computer to another. How can you do those things? And once you do them, where, exactly, is that e-mail stored?

The answer is, you store it in an **Outlook personal folder**, also called a **Personal Folders file, or PST**. And you store it there using one of **two methods**.

## Store messages locally, on your own computer

Creating and using Personal Folders, or PSTs, in Outlook is simple. Here are a few reasons why you may want to try using them:

- **To free up server space** You may want to do this, for example, if you're getting reminders from your system administrator that your mailbox is about to reach its size limit.
- **Better record keeping** Use Personal Folders for messages that you're keeping for professional or private reasons. PST storage can help you maintain a "**paper trail**."
- **Portability** You can use Personal Folders to move or copy messages from one computer to another computer, or to back them up to a CD-ROM or a data stick.

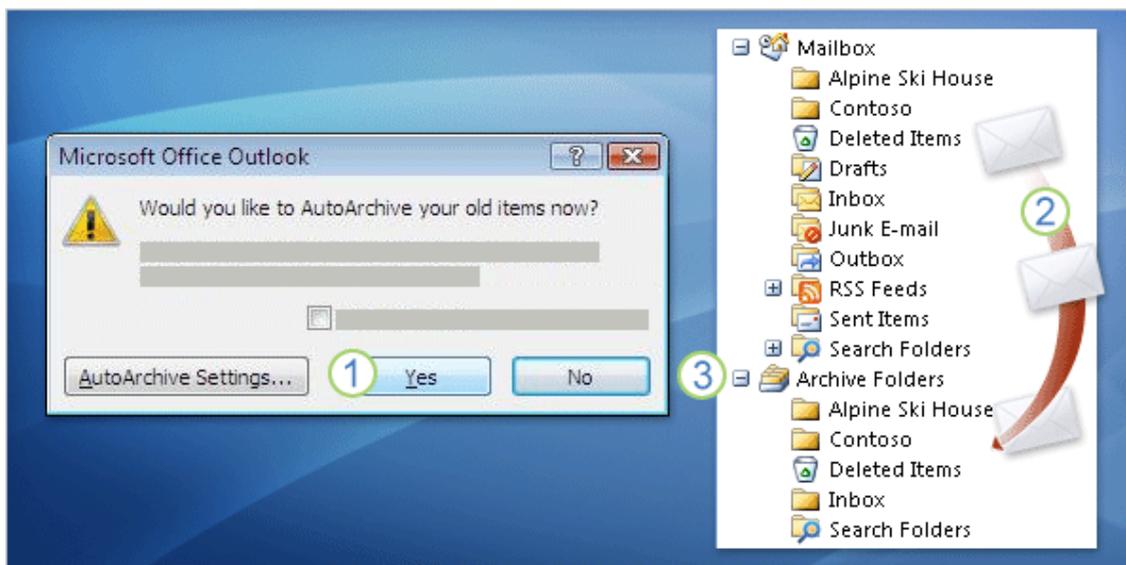
## Think before you store

We just talked about the benefits, but you should also know that local storage isn't for everyone. As you consider whether it's for you, keep these points in mind:

- PST means access from one computer at a time. Messages filed in a PST are **less accessible than when they're left on the e-mail server**. They are on your own computer, and if you go to another computer, you can't read them there. (For a way around this limit, see the last course in this series.)
- **Only one person at a time can open a PST file**. Even if you share your computer and share permission to access a PST file, each user must close the file before another user can open it.
- **Company policy** may not allow local storage. Some companies have rules about what you can or cannot keep. These company retention policies may

not let you create PSTs (or may at least discourage you from creating them). Instead of moving messages to folders you create yourself, you may have special "managed folders" that you access. Usually these folders are created and managed by your system administrator.

## With Archive, it's about time



We've discussed some of the benefits and drawbacks of local storage. Now it's time to discuss the methods. We'll start with **Archive**. The great thing about the Archive method (also called **AutoArchive**) is that to use it you don't have to do anything except click Yes.

In a typical installation of Outlook, **AutoArchive is on by default**. That means that once you give Outlook the go-ahead by clicking Yes in the "Would you like to AutoArchive your old items now?" message, AutoArchive just does its thing.

As the message implies, **AutoArchive moves messages based on how old they are**. It does this regularly (for example, every 14 days) as long as you say yes.

Here's an overview of what happens:

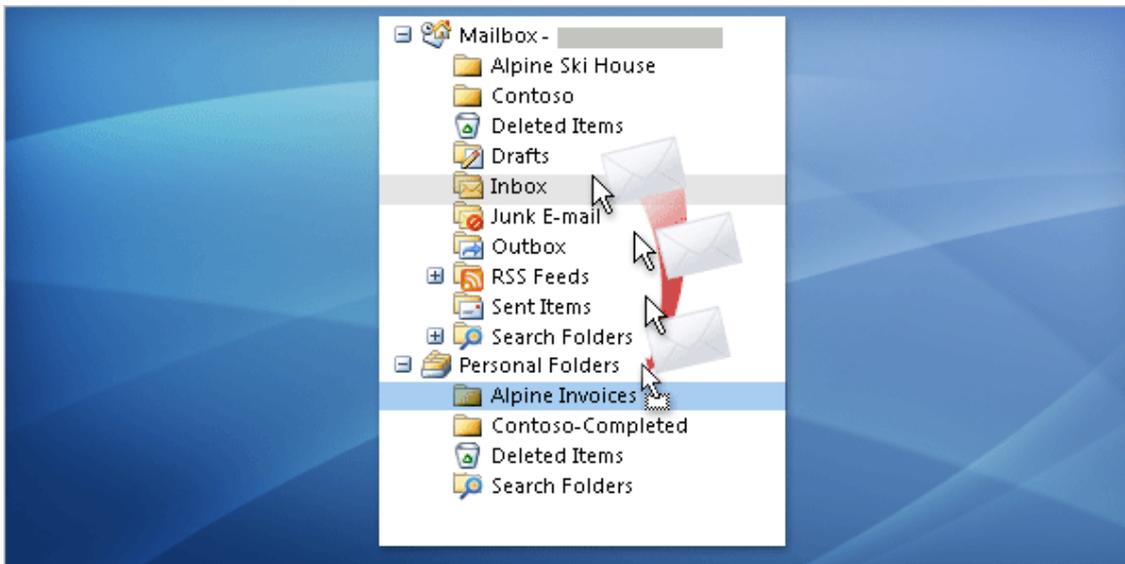
- 1 To start the process you click Yes.
- 2 Messages are moved from your Mailbox...

3 ...to a folder named Archive Folders.

**Outlook creates this folder for you.**

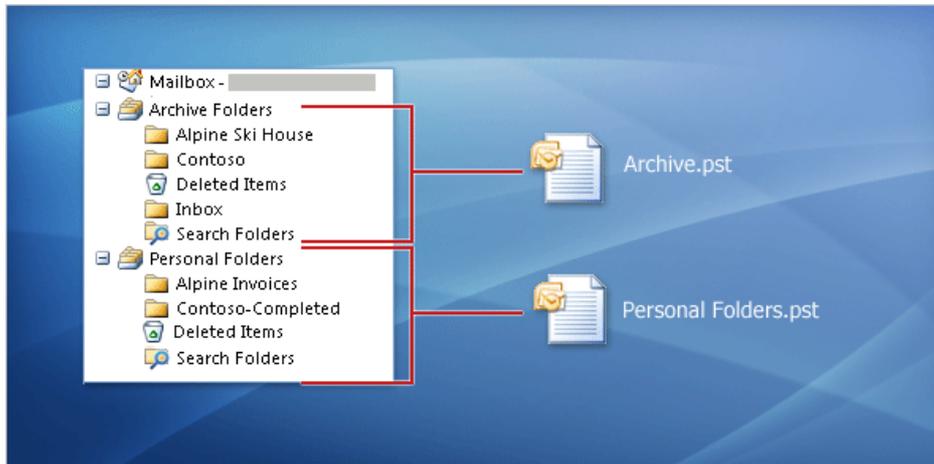
Any **subfolders** in your Mailbox are automatically **mirrored in the Archive Folders** folder, and messages are moved to those subfolders according to where you filed them in your Mailbox. That is, **Archive takes your existing organization and mimics it in the Archive Folders folder.**

**Personal Folders give you maximum control**



In contrast with Archive, when you use the **Personal Folders** method, you do a bit more work. That is, you'll be the one to create the local folder and subfolders, and you'll put the messages there. You move messages by dragging them, by using menu commands, or by creating your own rules. **The advantage? Because you do the moving, you can organize your messages however you like.**

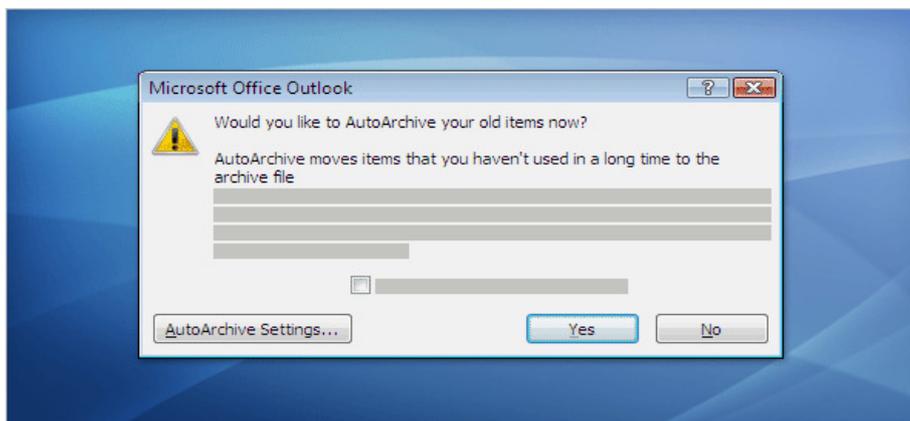
## They both use PST files



For **both Archive and Personal Folders**, messages are **moved (not copied)** to an **Outlook folder**. With both methods, you'll always be able to access your moved messages from a folder in the Navigation Pane in Outlook.

Another similarity between the methods is that the folders, the subfolders, and the messages they contain are **stored in a file on your computer called an Outlook data file**. Other names for an Outlook data file include **Office Outlook Personal Folders File, PST, and personal store** (because you personally store a PST file on your own computer).

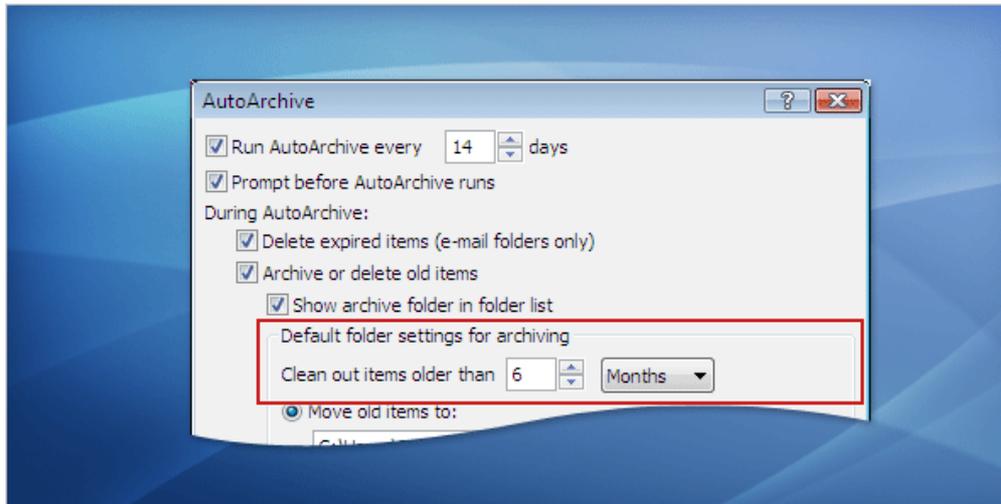
**Use AutoArchive to move old messages to an Archive folder, automatically.**



## Step 1: Make sure it's on, and decide how often it runs

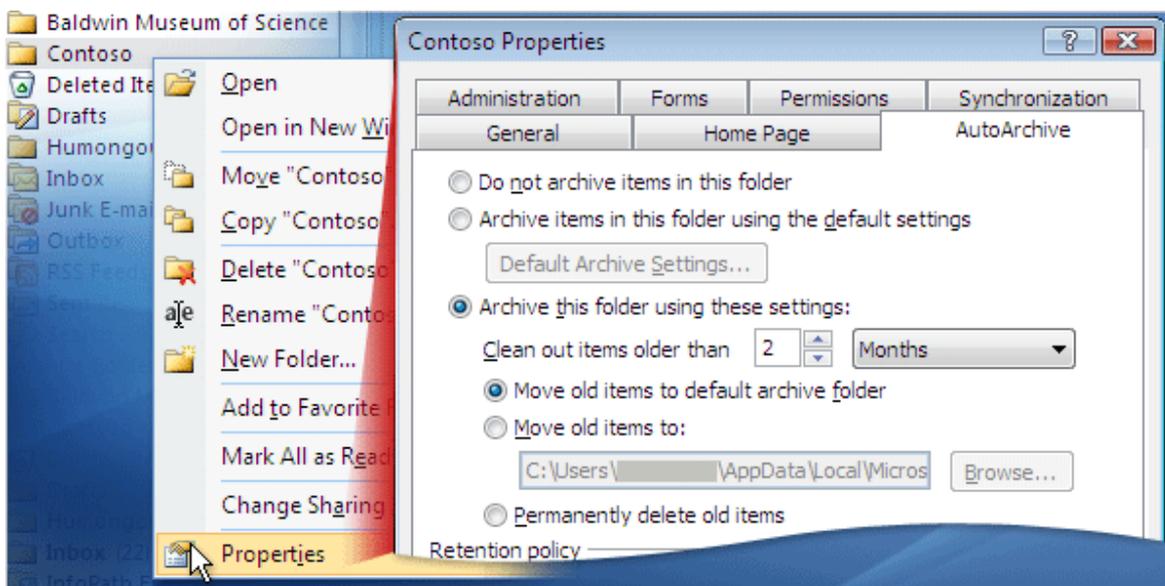
**AutoArchive is on by default.** You'll know it's working if you're periodically prompted with the "Would you like to AutoArchive..." message

### 1. Tools – Options – Other tab



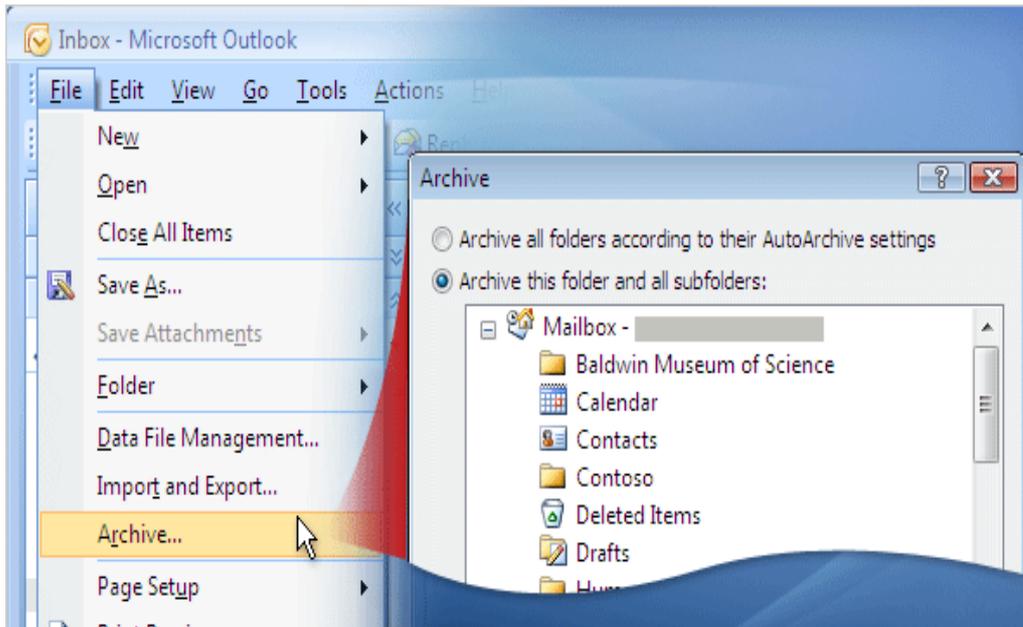
**Archive can be very flexible.** You don't have to archive only at the selected time intervals; you can do it anytime. And you don't have to archive everything.

**right-clicking** the folder, clicking **Properties**, and specifying your custom settings



Suppose your inbox is getting messy or too full, and your regularly scheduled time for AutoArchive is a week away. You can say, "Archive this now" by clicking Archive on the File menu.

Any messages that have reached their maturity date will be archived on the spot.

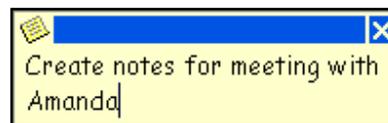
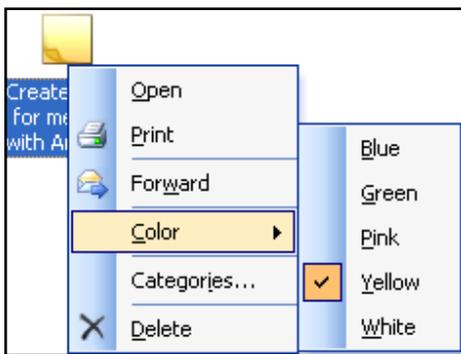


## UNIT 4

### FOLDERS

#### The Notes Folder

The **notes** folder is very much like **yellow post it notes** you have on your desk and place on the monitor, the only difference being that they're in a folder. The notes can be used for anything of your choosing as with changing colours.



Select the **options** command in the **Tools** menu and click '**Notes Options**' to modify **notes settings**.

#### The Journal Folder



The Journal folder allows you to **keep a record of every correspondence you have had with an individual, or every time you have used an application such as Word. The journal puts the information into a timeline effect.**

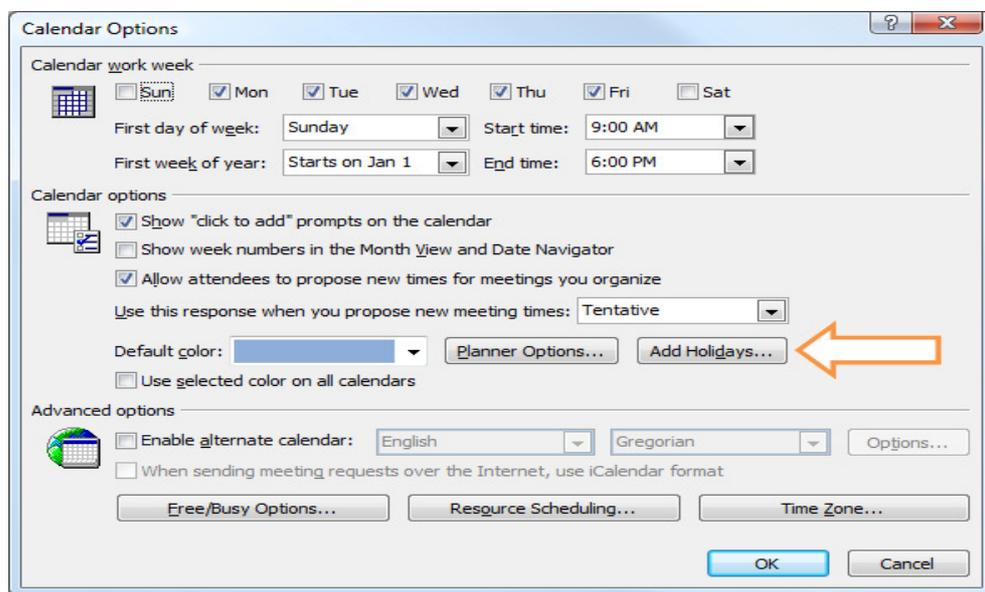
Microsoft does recommend though that you use the Activities tab under contacts to see every correspondence you have had with an individual.

## The Calendar Folder

The Calendar is a powerful tool and you can customise your calendar. To customise the calendar select the view menu and choose Customise current view / Other settings, this then allows you to change the formatting of the calendar as well as the view.

OR

## Tools menu – Options – Calendar Options



## Calendar Preview – Snapshot email

1. Open a new message
2. Insert tab – Include Group – Calendar
3. Select options

## Contacts Folder

If you have a contact that contains information that would benefit others, right click on the contact name and send as a **business card**. This then adds the

contact in as an attachment, and when the user receives the contact and they double click it, it will open as a normal contact allowing them to save it.

## To customise the Contacts Folder:

Tools menu – Options – Calendar Options

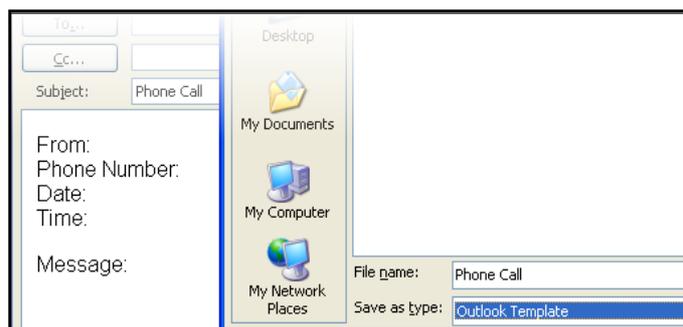
## Templates & Forms

### How to Create an E-mail Message Template

1. On the **Tools menu**, click **Options**, and then click the **Mail Format tab**.
2. Clear the Use Microsoft Office Word 2003 to edit e-mail messages check box.
3. Click Apply, and then click OK.
4. On the **File menu**, point to **New**, and then click **Mail Message**.
5. Type the **recipient**, **subject**, and **message** that you want.
6. On the **File menu**, click **Save As**.
7. In the **Save As Type** list, click **Outlook Template (\*.oft)**.

The file name is automatically the subject line of your message.

8. Click **Save**.

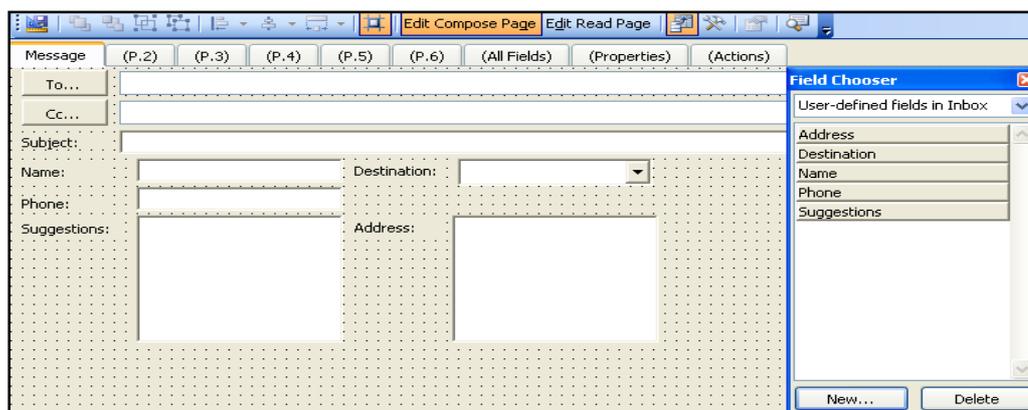


## How to Create an Item Based on Your E-mail Message Template

1. On the **File** menu, point to **New**, and then click **Choose Form**.
2. In the **Look In** list, click **User Templates in File System**.
3. Click your **template** in the list, and then click **Open**.

## How to Create an E-mail Message Form

1. On the **File** menu, point to **New**, and then click **Mail Message**.
2. Type the **recipient**, **subject**, and **message** that you want.
3. On the **Tools** menu, point to **Forms**, and then click **Publish Form As**.
4. In the **Look In** list, click **Personal Forms Library**.
5. In the **Display Name** box, type the **name** that you want for the form.
6. In the **Form name** box, type a **file name** for the form if you want the file name to be different than the display name.
7. Click **Publish**.
8. If you are prompted to save the form definition with the item, click **Yes**.



## How to Create an Item Based on Your E-mail Message Form

1. On the **File** menu, point to **New**, and then click **Choose Form**.
2. In the **Look In** list, click **Personal Forms Library**, click your **form**, and then click **Open**.

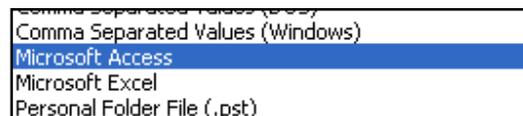
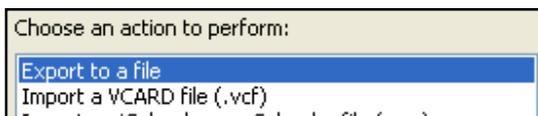
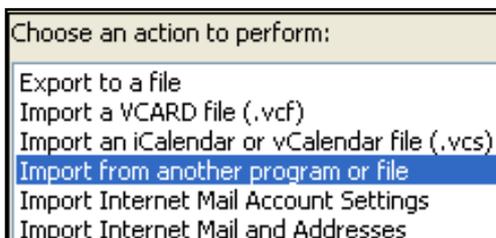
To add fields to your e-mail message form, you must customize the e-mail message form in the Outlook Forms design environment.

## Integration

**Importing and exporting are great ways of saving you time.**

A good example of this could be that all your clients details are kept in Excel and to sit down and manually add them in could take a very long time.

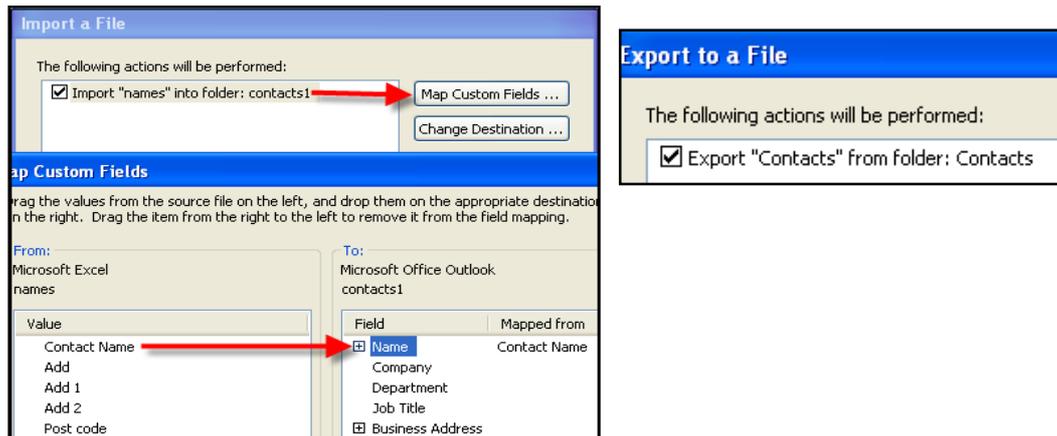
**Importing and Exporting is in the File menu.** When you choose Import and Export you need to run through the wizard choosing what you want to do and the application you want to export to or import from, as shown below.



You have to **select the folder** that the information is going into or from, such as a **Contacts folder**. If you are **exporting** you have to choose a **file location** for where the file is going as well as telling it **what you want to save** it as, such as an **Excel spreadsheet or Access database**. The file name you can make up rather than create the blank file first.

Once you have a file name selected a box appears confirming your Import or Export, which you need to select. If you are importing you will probably find that

your headings are not the same as Outlook, so you can choose the Map Custom Fields which allows you to match your headings in say Excel to what you want them to be in Outlook. To do this drag your Excel heading over to the equivalent heading in Outlook and let go. This then tells Outlook where to put it.



## Using Folders to Share Information

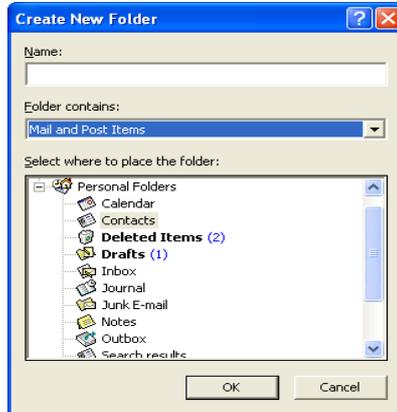
**Public folders and Permissions only work if you are using Microsoft Exchange Server.**

Public folders are stored at the bottom of the folder list and you will only see them once you click on the  button. You can store any type of folder in here, which is ideal when you want to share information with people such as contacts, let lots of people see a calendar for things such as holidays, or even a mail folder that anything can go saving you forwarding messages to everybody individually.

1. Select an **existing folder** or the mailbox.
2. Choose the **File - New Folder** or right click on a folder and choose **New Folder**.
3. Enter a **name** for your folder in the Name box.
4. In the **Folder Contains** box, select the type of items you want to go in the folder, Mail, Contacts etc.

5. In the **Select where to place the folder** section, select where the folder is going to go. So for Public folders scroll to the bottom, and find where you want to put it.

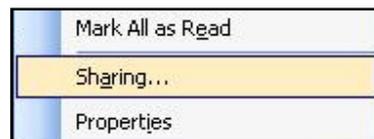
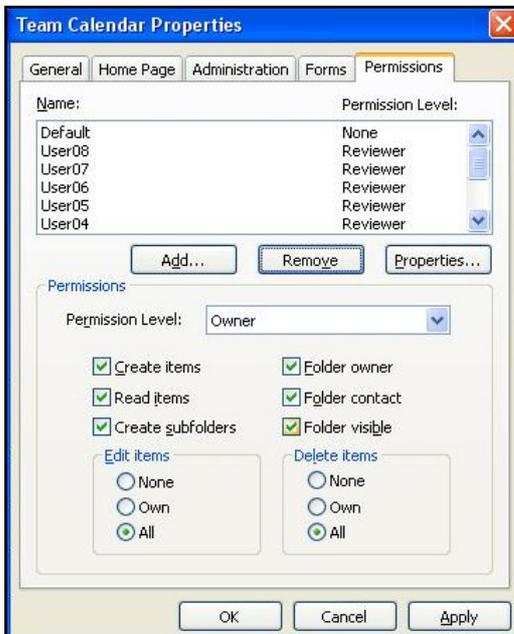
6. Click OK.



## Folder Permissions

To **add security** to your folders regardless of if it is your Mailbox or in Public folders set Permissions on it.

To set permissions choose **File / Folder / Sharing** or right click the folder and choose Sharing.



Once you choose the Sharing option a box appears and allows you to **Add users in** and choose the **relevant Permission Level**. If you are unsure of the permission level you require click the options in the bottom section of the box and the relevant permission level will appear or it will come up with the permission level as Custom.