



# Microsoft Office Training Series

# Outlook



## Intermediate Advanced



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## Welcome to your Outlook Intermediate/Advanced training course

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- At the end of this course you will have a sound practical knowledge of Outlook and the advanced features.
- You will feel more than confident using Outlook and be able to set up rules to filter emails and to use stationary, templates and forms to customise your emails.
- The powerful tools in Outlook in general helps simplify email communication, enhance group planning, scheduling of meetings, and also allow access to the information you need all from one place.



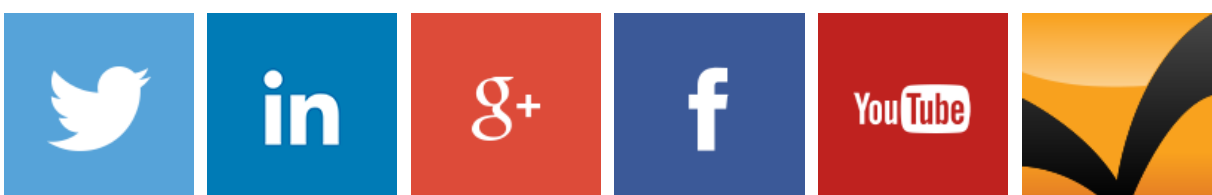
### Microsoft Office Training Series



### Professional Development Series

### Microsoft Technical Series

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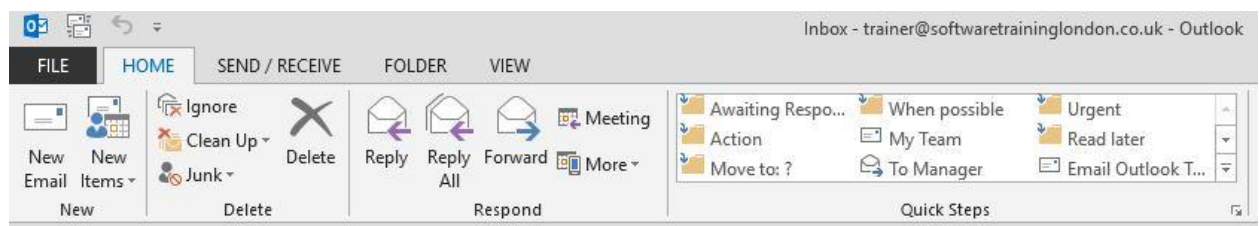
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# UNIT 1 Customising Outlook

As with all Microsoft Office applications, changes have been made to the user interface, this also applies to Outlook.

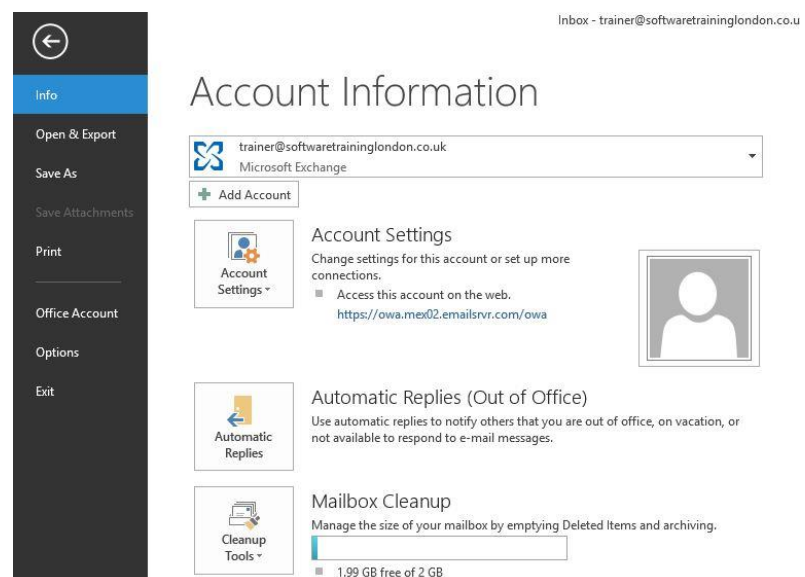
## Outlook Ribbon & Backstage View

The Ribbon appears across the top of your screen. The Ribbon replaces the traditional menu system that you may be accustomed to with previous versions of Outlook.



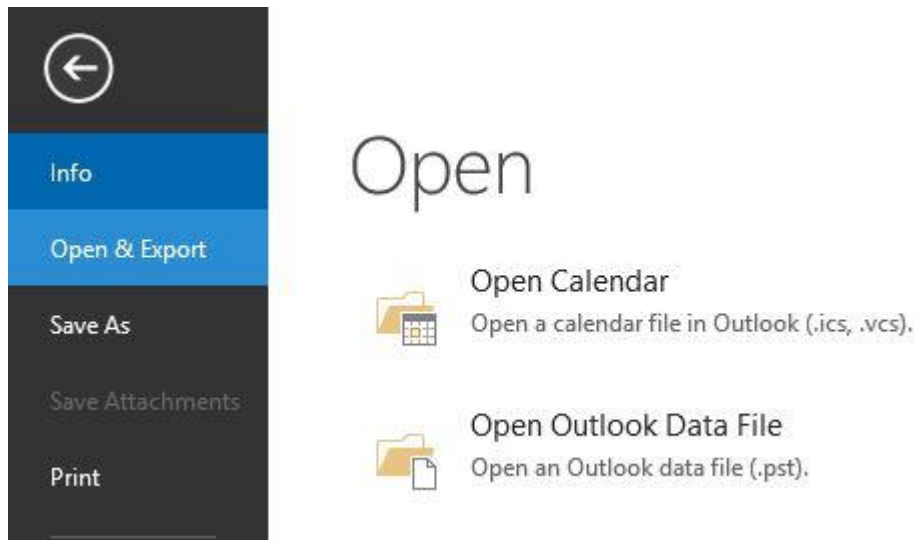
The Ribbon's been designed to help you find the right commands quickly. You'll see tabs such as **Home, Send/Receive, Folder and View**, within those tabs you'll see various groups of commands, all designed to make it easy for you to find what you're looking for. You'll notice some new groups such as '**Quick Steps.**' Another feature in the Office suite is that the **Ribbon is customisable** so if you want to add your own tabs and groups to the Ribbon, you are now able to do that. To access these options click on the **File tab** this takes you to the Backstage View.

Backstage view replaces the File menu from previous versions of Outlook. It's been designed to help you get to the task you need and complete your work

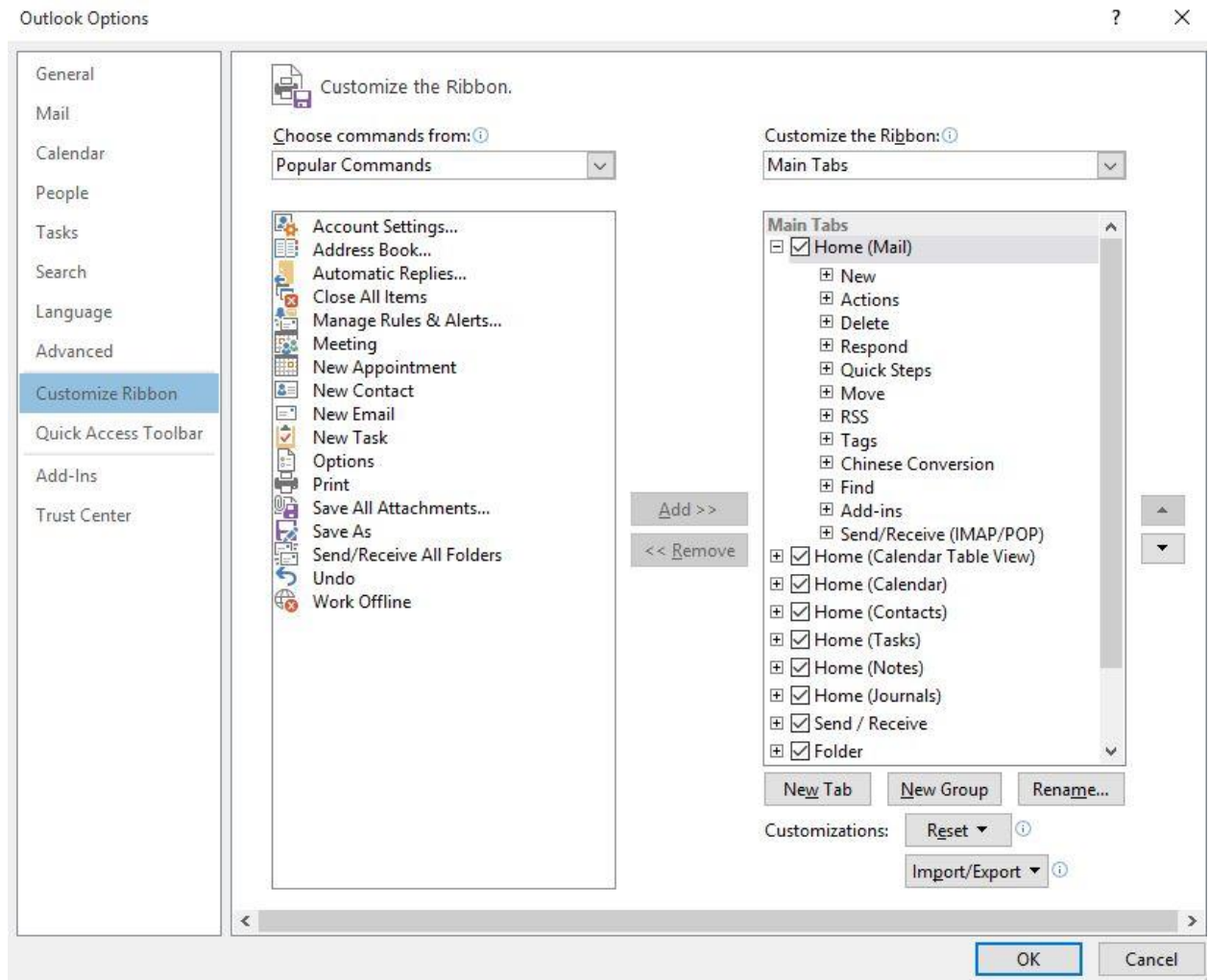


more efficiently. You'll find the Backstage View gives you access to things like **account information, clean up tools, rules and alerts, all specifically from the Info section.**

You've also got commonly used commands **like saving, printing and opening**. When you select a section, such as **open**, you'll see additional options to the right for **opening calendars, data files and importing**. The same thing applies to printing where you'll have access to the printer settings and of course, printing!



If you do want to customise the Ribbon, in **Backstage view**, select **Options**, this will open the Outlook options dialogue box where you'll be able to select **Customise Ribbon**. On the right hand side you will see the current tabs like Home tab, with the current groups within the tab.



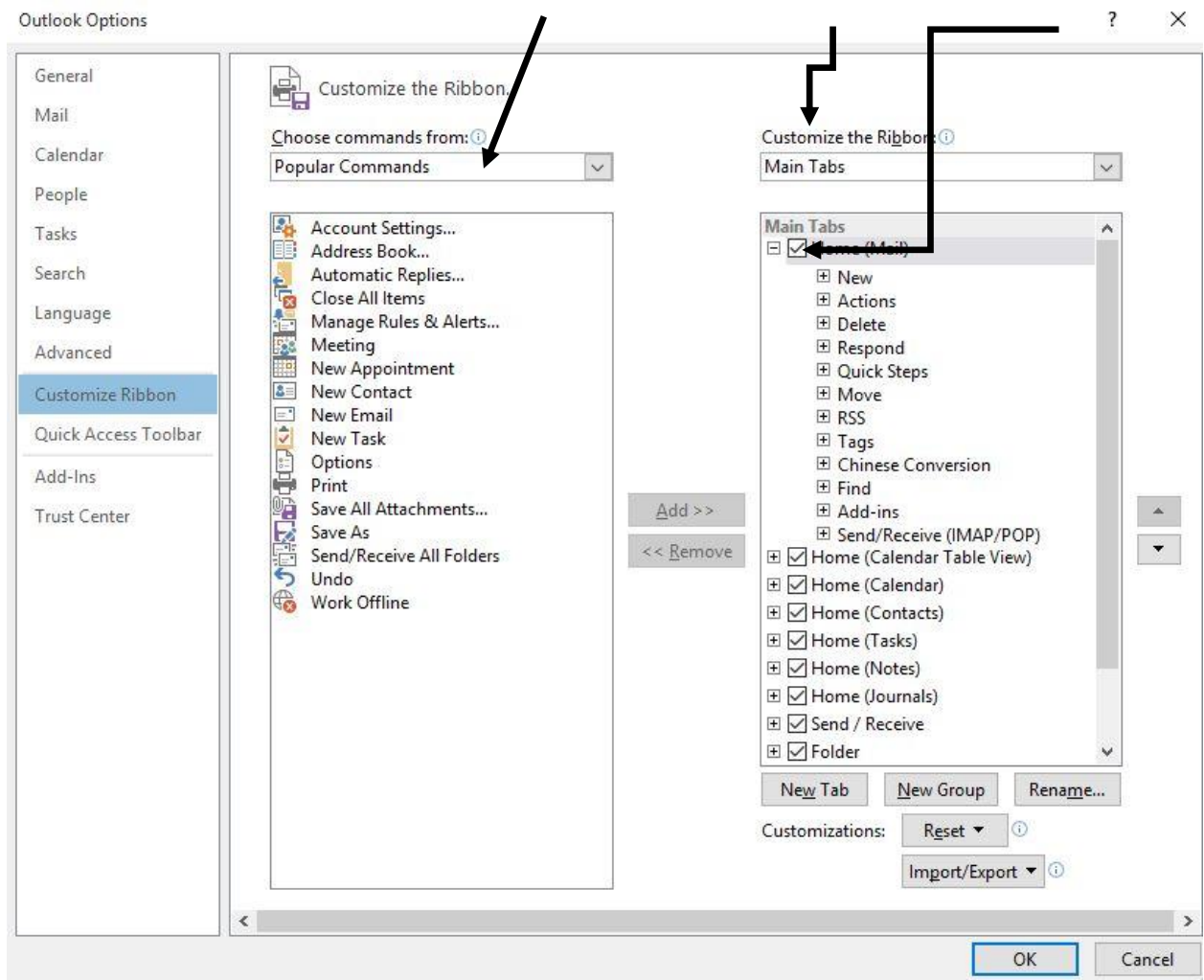
If you want to **create your own tabs, groups and rename** them, this can be achieved using the relevant buttons in the bottom-right hand corner of the Outlook options dialogue box.



If you want to add some of your own commands to any of the tabs or groups, they have to be tabs or groups you've created, known as **custom tabs & groups**.

To **add commands to a tab/group**, ensure the relevant customised tab/group is selected. To add commands, you need to access them from the left-hand side of the Outlook options dialogue box. Click the dropdown alongside Popular commands to access **All Commands**.

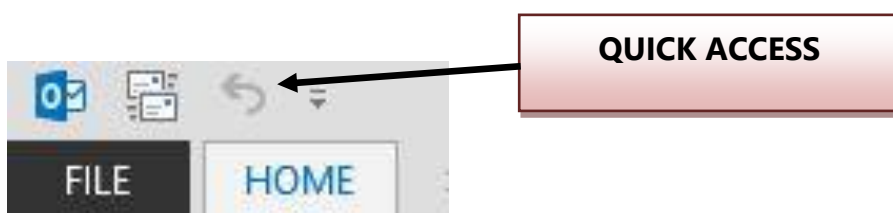




Now as you scroll down you have every command available to you in Outlook. **Choose a command** e.g. Active Tasks, click the **Add button**, this will now be added to the tab/group on the right-hand side. Continue in this fashion to add in further commands.

At any time you **can remove the custom tabs and groups** by going back to the **Outlook options** dialogue box, selecting **Customise Ribbon**, choosing the customised tab/group and clicking **Remove**.

Another item included in the user interface which can be very helpful is the **Quick Access Toolbar**, this sits in the top left-hand corner of the interface.





It too will contain **commonly used commands** like **send/receive and undo** which are there by default. Click the dropdown alongside it if there are other commands you would like to see on the Quick Access Toolbar e.g. print.

At the bottom of the dropdown menu list, you'll notice an option for **More Commands**, this will take you back to the Outlook options dialogue box where you can add on any command to the Quick Access Toolbar.

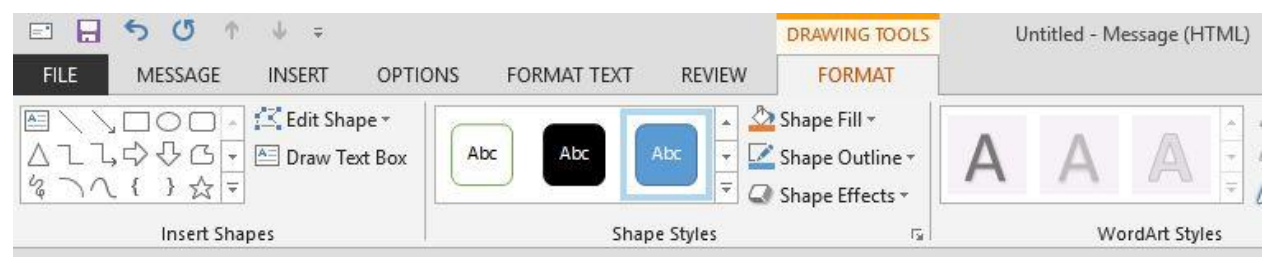
So all of these changes that you see in the user interface, including the improved Ribbon and the brand new Backstage view are all designed to help you get to those tasks that you need, to find them quickly and to work more efficiently in Outlook.

## Access Keys

These are **shortcuts** to opening the tabs of the Ribbon and accessing commands within the Ribbon. You use access keys by pressing the **Alt key** followed by another key or a sequence of other keys.

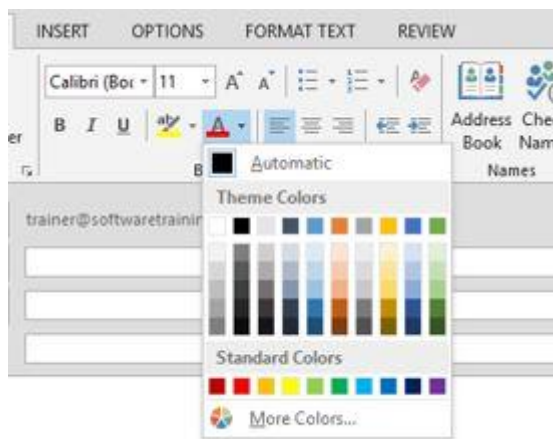
## Contextual Tabs

These are further tabs that the Ribbon contains. They house **commands that are specific to certain objects**. For example, if you insert a text box into your message, only then will it present the '**Drawing Tools**' contextual tab. This tab will contain all the relevant commands to format the text box.



## Live Preview

Live preview is a new technology that shows the results of applying an editing or formatting change as the user moves the pointer over various formatting options presented on the Ribbon.



## Using the Reading Pane

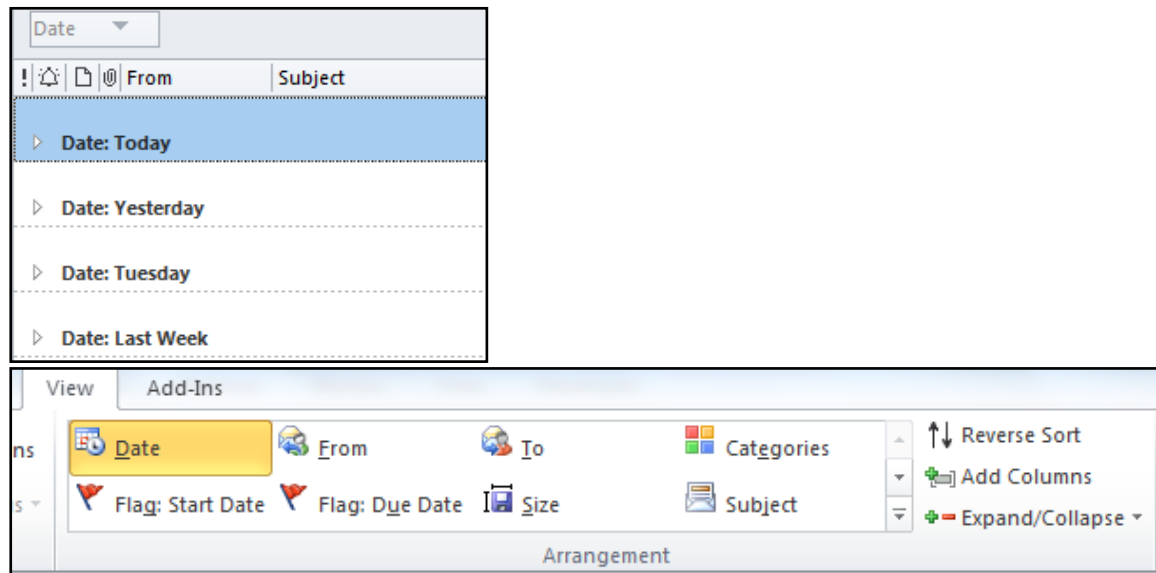
The **reading pane adds a window to the right or bottom of your screen** allowing you to see the content of your message without opening it up. The other option is not to have the reading pane on.



## Customising View Settings

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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 go to the View tab



## UNIT 2 Messages

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

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

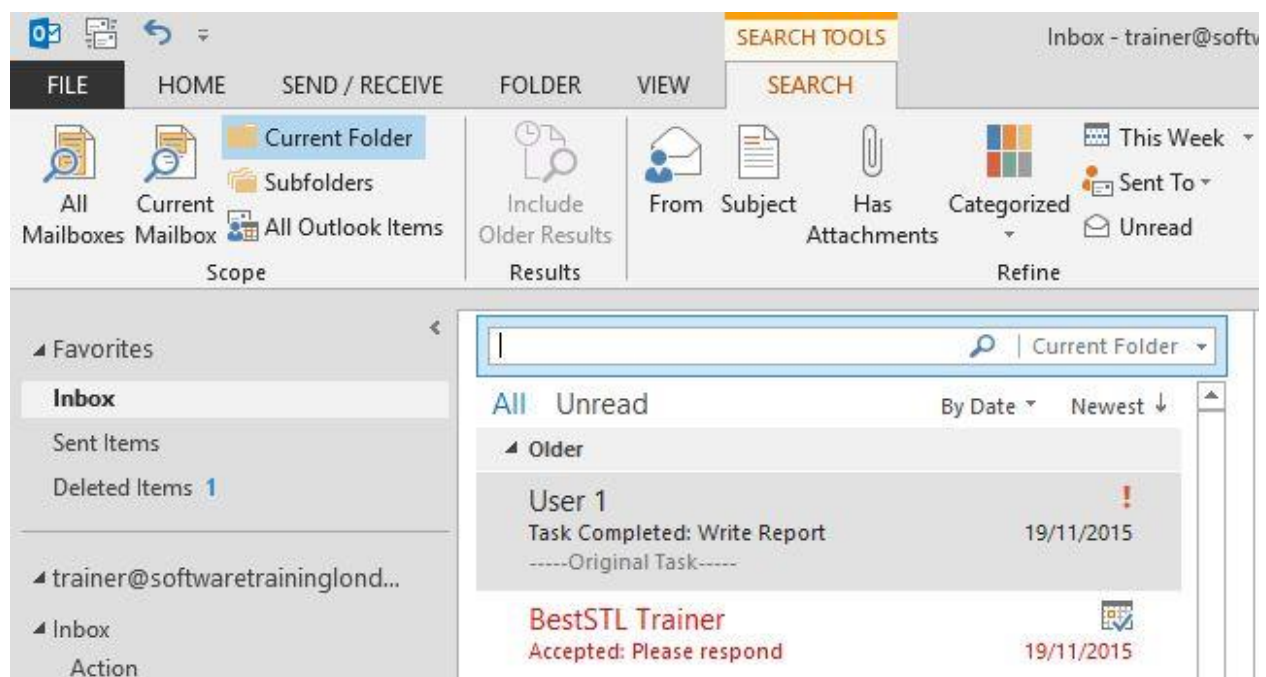
Use the following procedure to perform an Instant Search.

Click in the Search field at the top of the folder pane (Inbox or other selected folder). Outlook highlights the search area, as well as the selected folder on the Navigation pane.



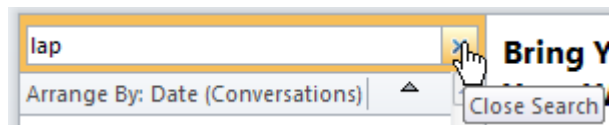
Enter the text to include in the search.

As you begin typing, Outlook starts searching. It displays the Search Results (in place of the full contents of that folder).



You can read, reply, delete, or move the items just like from any other folder.

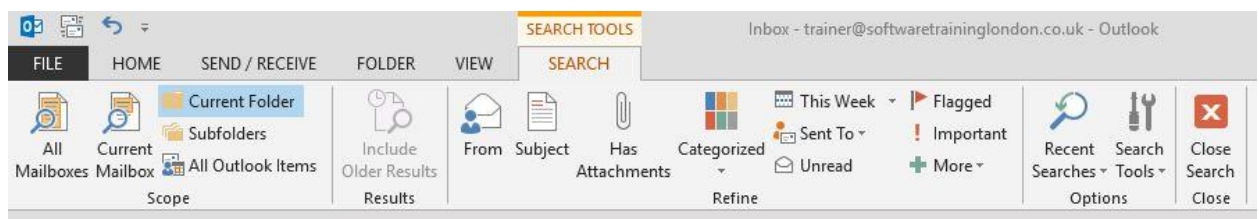
Click the X in the Search field to clear the search.



## Add more search criteria

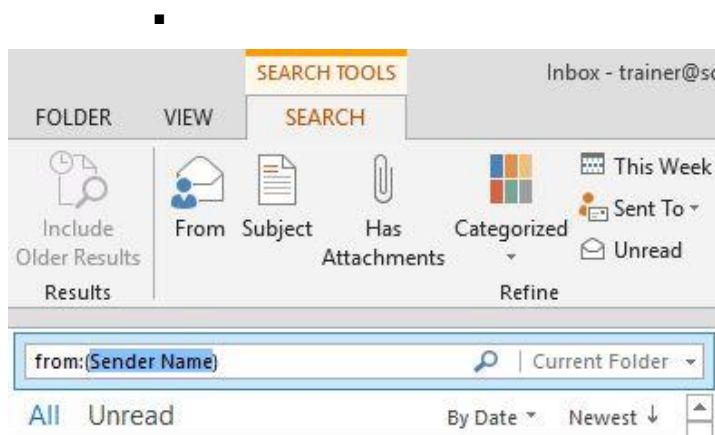
When you click on the Search field at the top of the Inbox or any other folder, the **Search** tab appears on the Ribbon. The tools on this Ribbon allow you to refine the search and change the scope of the search.

View the **Search** tab on the Ribbon.

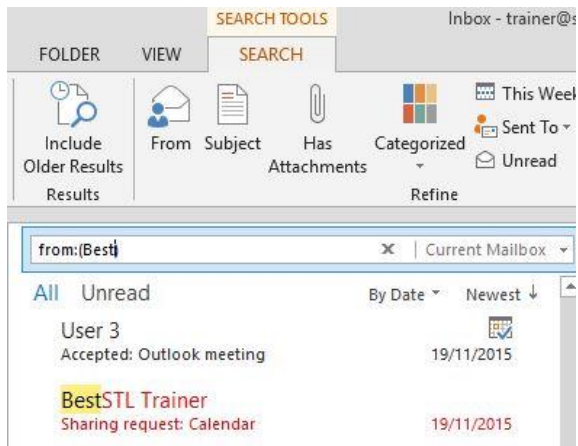


Use the following procedure to search for messages from a certain sender as an example of an advanced search.

Select the **From** tool from the Ribbon.



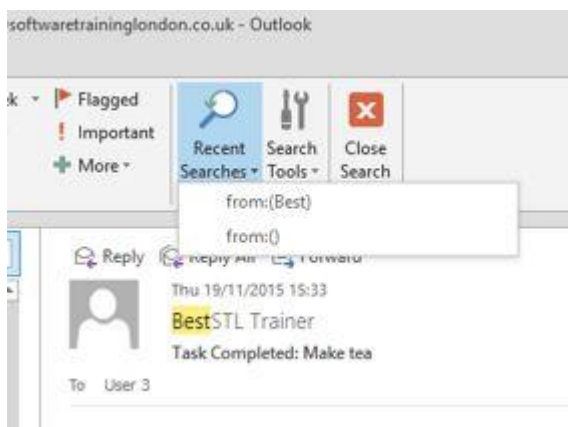
Enter the Sender's name to replace the highlighted text "Sender Name."



## 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

On the **Search Tab** you get the option to search by current or all subfolders



## Creating search folders

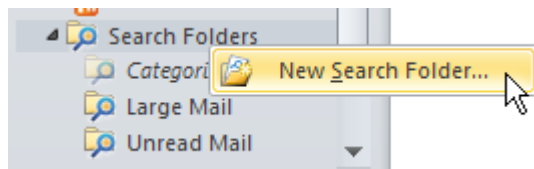
A **Search Folder** is a virtual folder that provides a view of all e-mail items that match specific search criteria. For example, the Unread Mail Search Folder allows you to view all unread messages from one location even though the messages may be located in different Mail folders. Default Search Folders

There are three default Search Folders

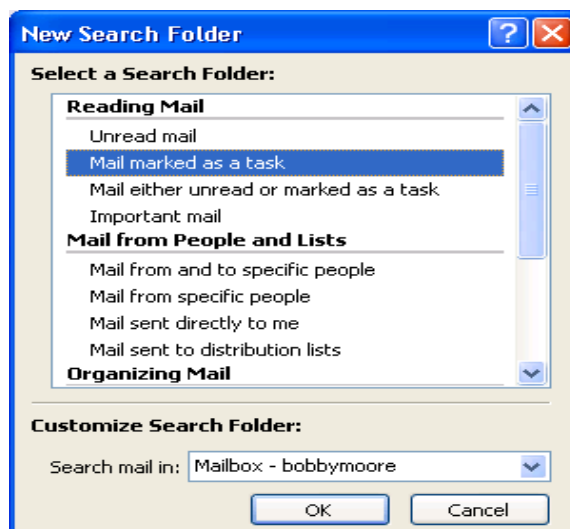
Categorised Mail includes items that have been assigned a color category.

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 support prefix matching in the text strings that you specify. For example, if you want to include all messages with

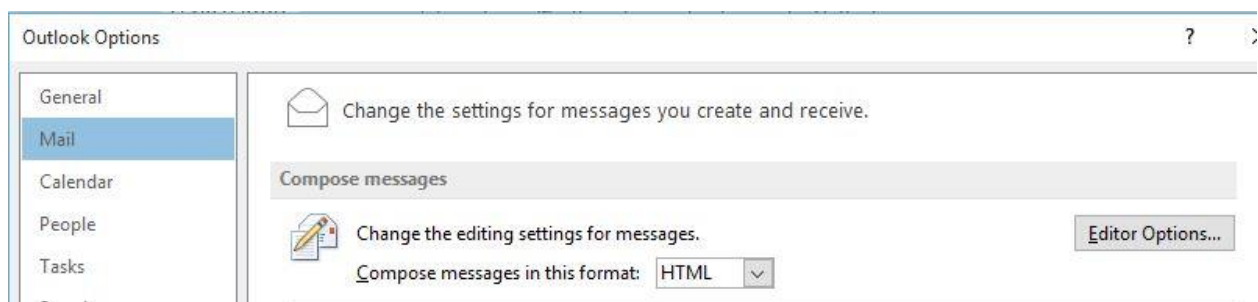
the word "rain" in the Search Folder, the Search Folder will also include messages with words like "raining" or "rainy" but won't include words like "brain".

**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.

## Customising Messages

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Switch from plain text emails to rich text or HTML



To check your text formatting and font settings, go to **File > Options**, and click on **Mail from the left screen**. 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

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**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.

**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



**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.

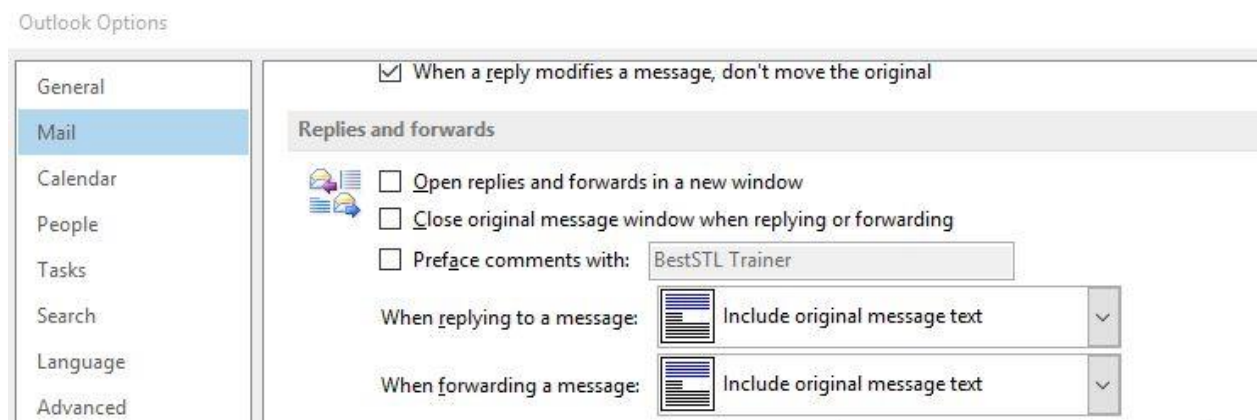
Change your global email font settings in Outlook

Go to **File > Options**, and select **Mail from the left screen** in the dialog that opened. Then, click on the **Stationery and Fonts** button.

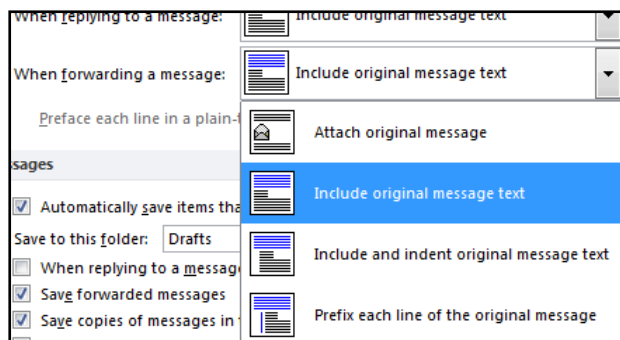


## Message Handling Options in Outlook

### On Replies and Forwards in Outlook



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

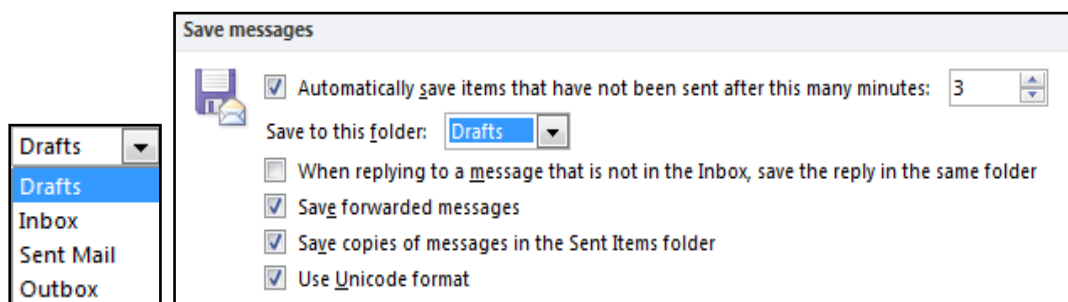


The When forwarding a message drop-down menu defines how Outlook will handle forwarded emails.

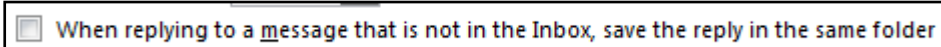
## Advanced E-mail Options

### "Save messages" Options

By default all unsent emails in the Drafts folder.

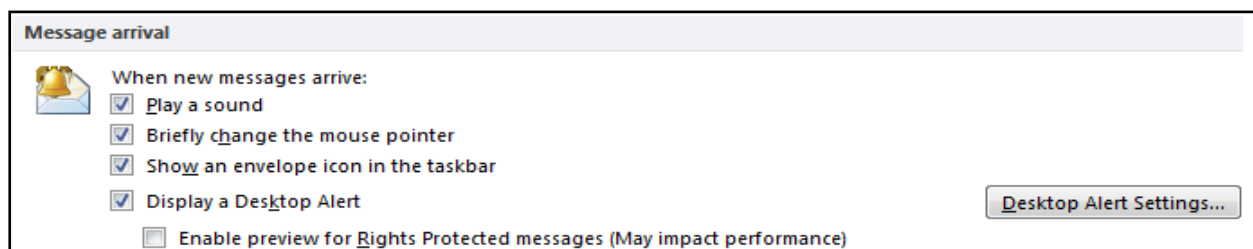


By default, Outlook **automatically saves** all unsent emails for you **every three minutes**.



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

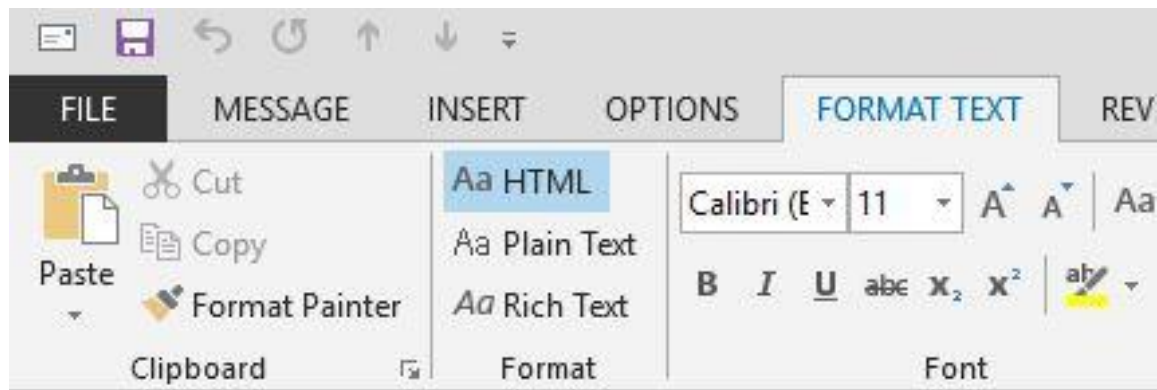
### "When new items arrive in my inbox"



## Change the Message Format for One Message

Create a **new message**.

With the message open, on the **Format Text** 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

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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

Click the **File tab**, and then click the **Info tab** in the menu.

Click **Automatic Replies (out of office)**.

In the Out of Office Assistant dialog box, select the **Send Automatic Replies check box**.

If you want to specify a set time and date range, select the **Only send** during this time range check box, set the Start time, and then set the End time.

In the **Inside my organization tab**, type the message that you want to send within your organization, and in the **Outside my organization tab**, type the message that you want to send outside your organization.

Click Apply.

### Rules

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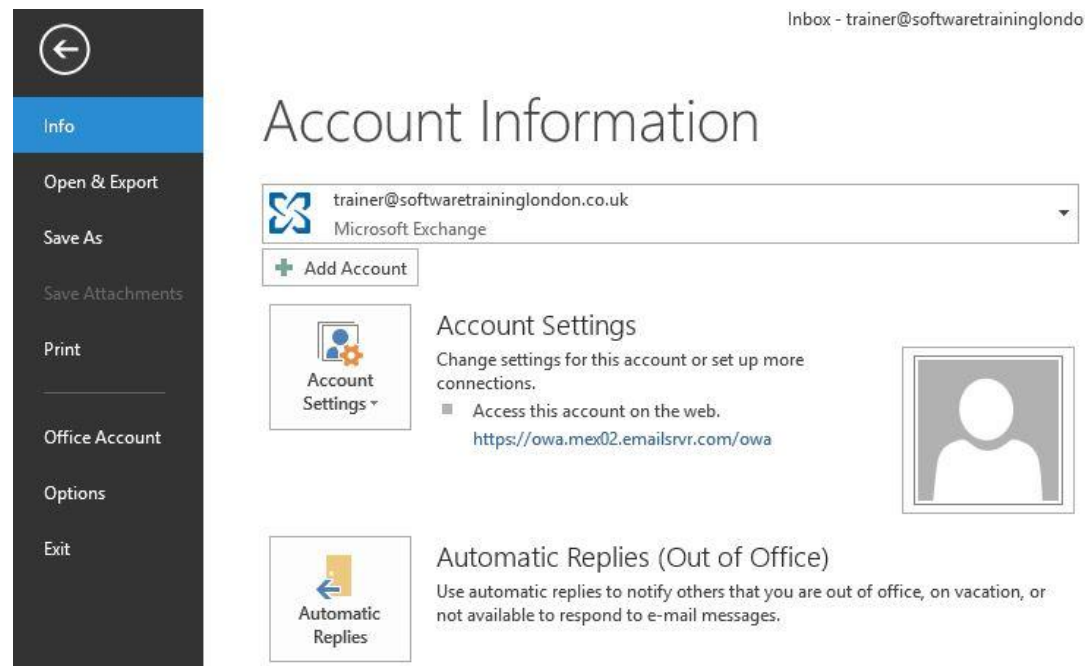
Rules are **instructions** that you specify for how something is to be handled by Outlook.

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



## 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.

Click the **File tab**, and then click the **Info tab** in the menu.

Click **Automatic Replies (out of office)**.

In the **Out of Office Assistant** dialog box, click **Rules**, and then click Add Rules.

In the **When a message arrives that meets the following conditions box**, specify the conditions that you want the message to meet.

Select the **Do not process subsequent rules** check box to specify that this rule must be the last one that is applied.

To specify more conditions, click **Advanced**, select the options that you want, and then click OK.

In the **Perform these actions box**, select the options that you want.

**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.

Automatic Replies - trainer@softwaretraininglondon.co.uk

☐ Do not send automatic replies

☒ Send automatic replies

☒ Only send during this time range:

Start time: Fri 29/01/2016 12:00

End time: Sat 30/01/2016 12:00

Automatically reply once for each sender with the following messages:

Inside My Organization    Outside My Organization (On)

Tahoma 8 B I U A

This is being handled by User 1 while I am away

## Organise Messages with Rules

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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.

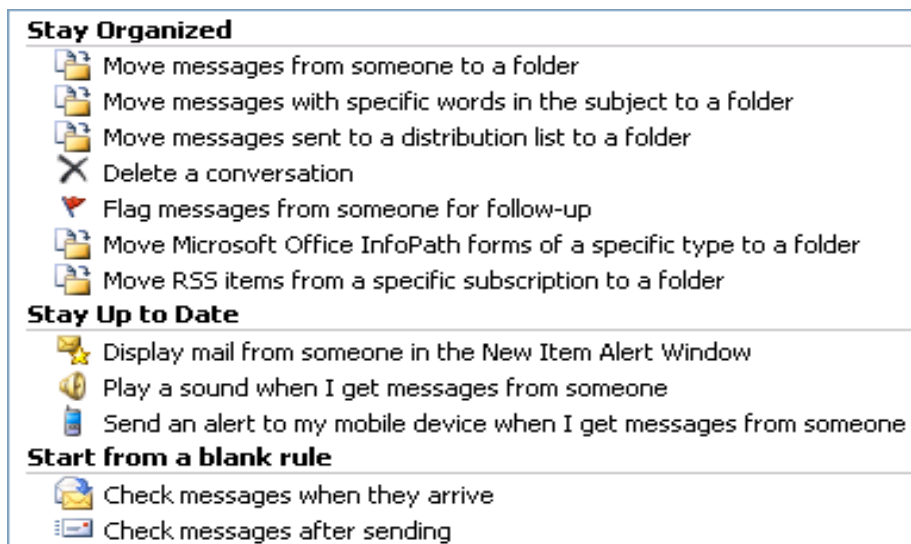
### How rules help you manage messages

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.

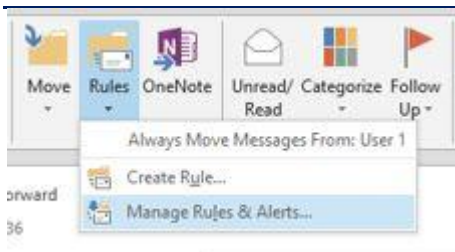
**Start from a blank rule** These are rules that you create from scratch.



## 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 scratch



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

In the Home Tab go to the Move section and choose Rules.

Click Manage Rules & Alerts Rule.

Click New Rule

Under Start from a blank rule, select either Apply Rule on messages I receive or Apply Rule on messages I send and then click Next.



Under Step 1: Select condition(s), select the conditions that you want the messages to meet for the rule to apply.

Under Step 2: Edit the rule description, click an underlined value if you have not done so already, and then click Next.

Under Step 1: Select action(s), select the action that you want the rule to take when the specified conditions are met.

Under Step 2: Edit the rule description, click an underlined value if you have not done so already, and then click Next.

Under Step 1: Select exception(s), select any exceptions to the rule, and then click Next.

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.

Click Finish.

Run a rule periodically but not all the time

In the **Home Tab** go to the **Move section** and choose **Rules**.

Click **Manage Rules & Alerts Rule**.

Click **Run Rules Now**.

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.

Select the **folder** that you want to apply the rule to.

Select the **category** of messages that you want to apply the rule to.

For example, you can apply the rule only to unread messages in a folder.

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 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.

On the **Home Tab**, go to the **New section**, and then click **Mail Message**.

On the **Options tab**, in the **Format** group, click **Plain Text**.

In the message body, **type the message** that you want to send as your automated reply.

In the message window, click the **File Tab** and then click **Save As**.

In the Save As dialog box, in the **Save as type** list, click **Outlook Template (\*.oft)**.

In the **File name** box, type a name for your message template, and then click **Save**.

### Step 2: Create a rule to automatically assign categories to new messages

**Do one of the following:**

In the Home Tab go to the Move section and choose Rules.

Click Manage Rules & Alerts Rule.

Under Start from a blank rule, click Apply rule on messages I receive, and then click Next.

Under Which condition(s) do you want to check?, select the from people or public group check box and any other criteria that you want, and then click Next.

When you see a dialog box informing you that this rule will be applied to every message that you receive, click Yes.

Under What do you want to do with the message?, select assign it to the category category.

Click Next.

Assign the category

Click Next.

Tick Run this rule now on messages already in "Inbox" 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

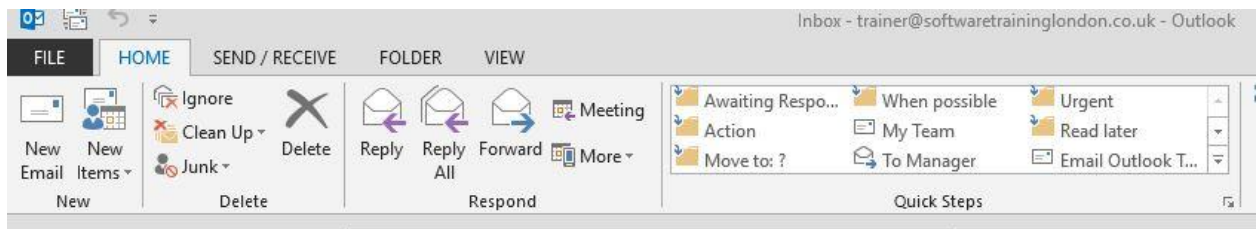
To turn off the rule you created in step 2 above, do the following:

On the **Tools menu**, click **Rules and Alerts**.

On the **E-mail Rules tab**, under **Name**, clear the check box for the rule you want to turn off.

## Using Quick Steps for Inbox Management

When your Inbox fills up very quickly, you can make use of Quick Steps, Categories and Subfolders to manage your Inbox.

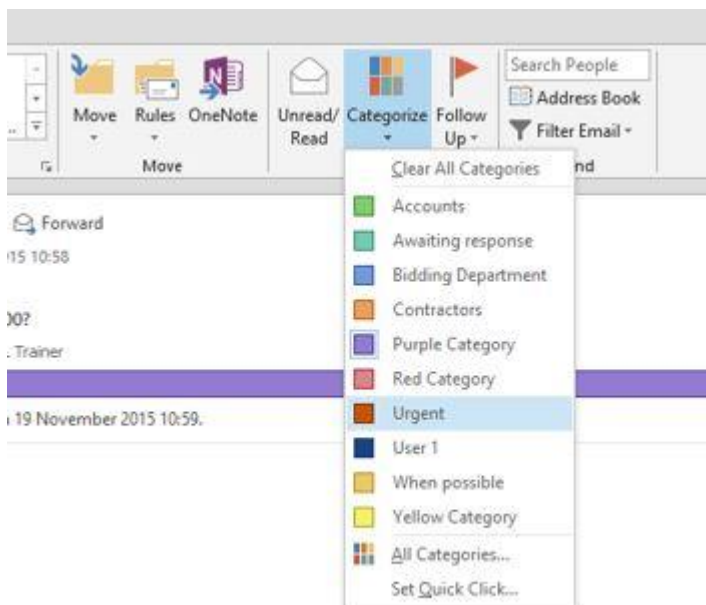


You can create a new Quick Step which will move a message to your specified subfolder and assign a category to that message.

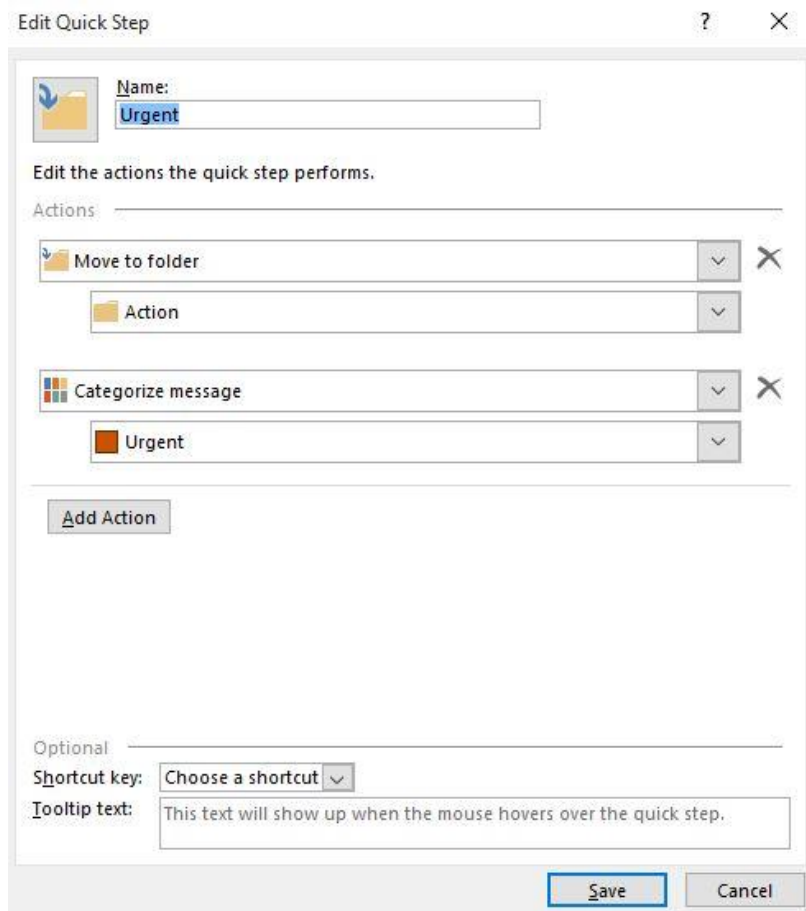
Create a subfolder by right-clicking the Inbox folder, then selecting New Folder.

Rename this subfolder (e.g. Action)

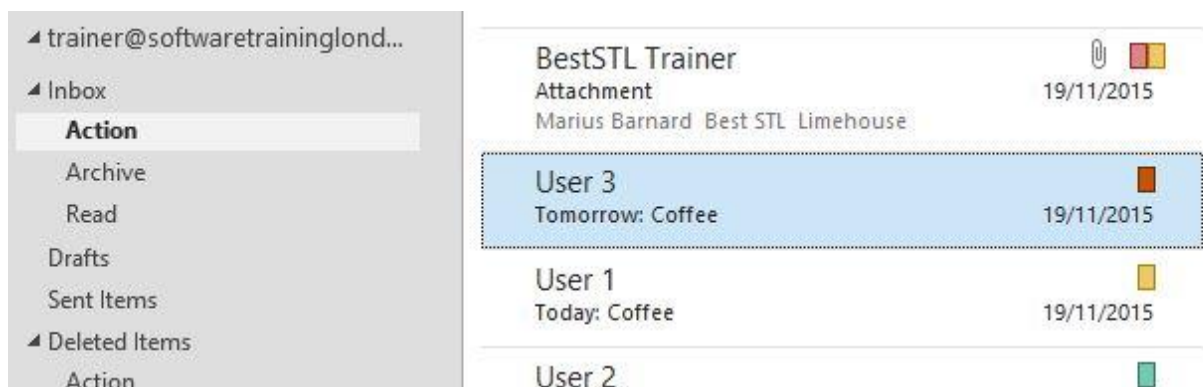
Create a custom category for urgent messages.



In Quick Steps, create a new button called Urgent. Afterwards, configure this button to move urgent messages into the new subfolder and categorise them as Urgent.



Select an urgent message in the Inbox, then click on your Urgent button in Quick Steps. This message will be moved into your subfolder for urgent messages. The benefit of using Quick Steps instead of creating an automatic rule to do this is that you remain in control of when the message is moved into the subfolder. A rule will simply move the message and you might see it too late or miss it altogether.

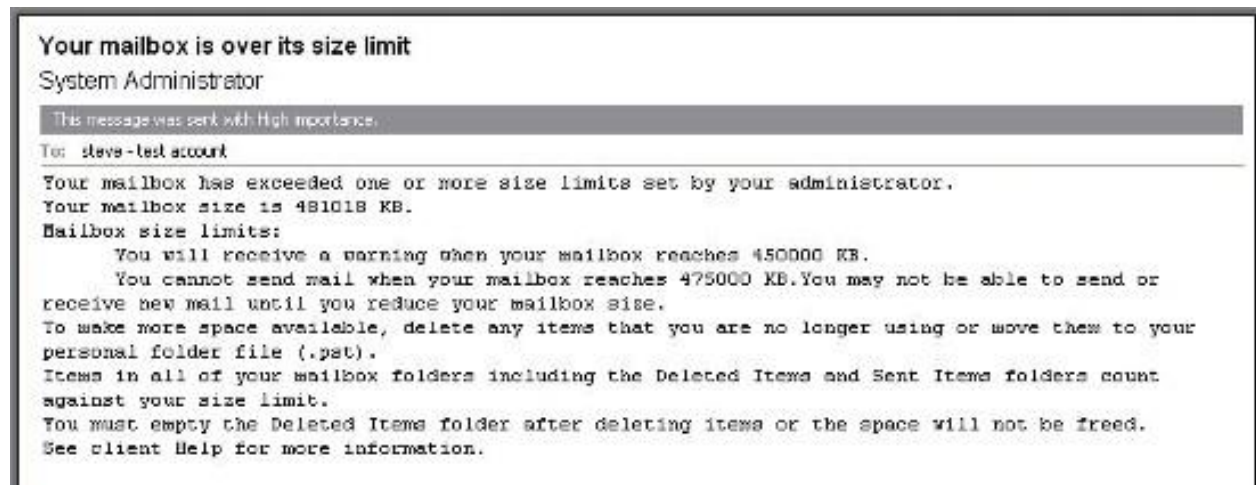


Using Quick steps is a great way to manage and reduce the number of messages in your main inbox, while still dealing with these messages effectively.

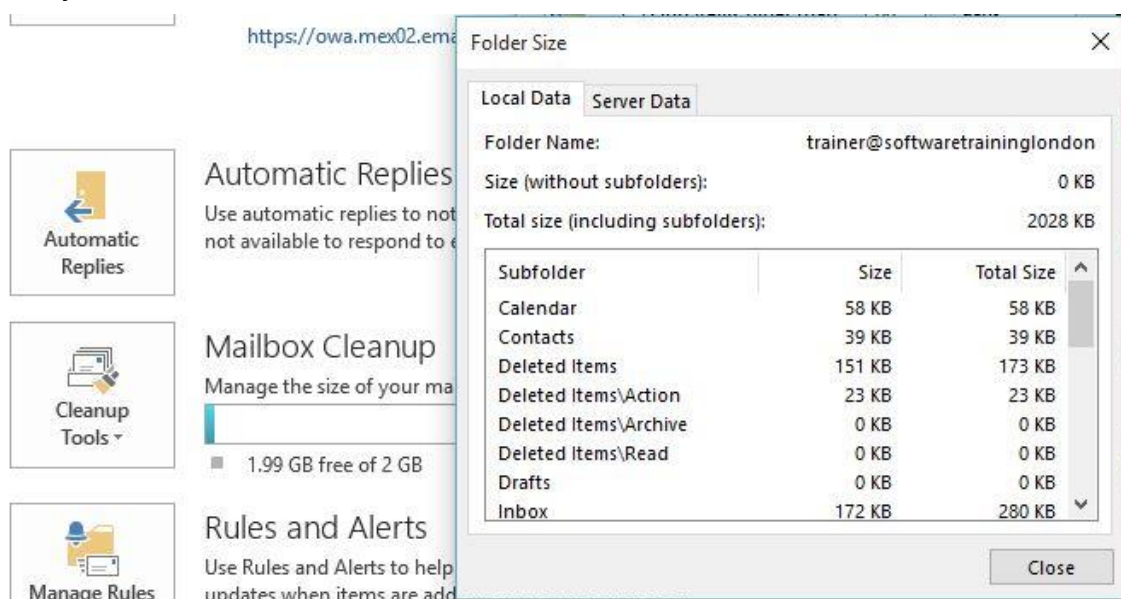
## MailBox Cleanup (I)

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

Is your mailbox getting too big?



See your mailbox size

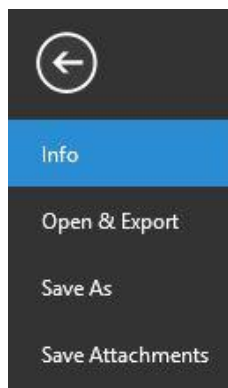


Find the large messages

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.

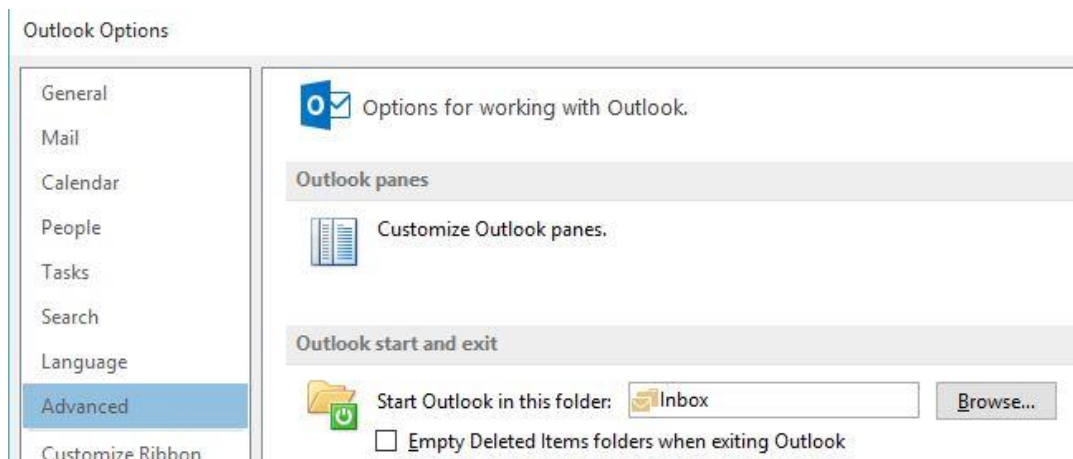
## Save attachments outside your e-mail



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).

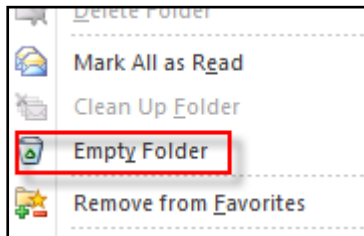
## Empty the Deleted Items folder



Tidy automatically: Click File Tab, Options.

Go to **Advanced**, select the **Empty the Deleted Items folder upon exiting** check box. Your mailbox will be trimmer in no time.

**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.

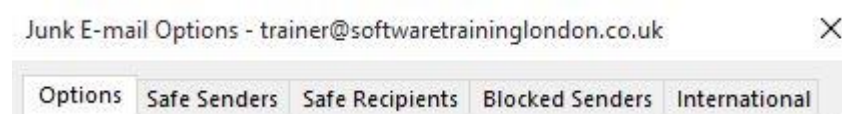
Personal distribution lists cannot be added by using this check box.

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.

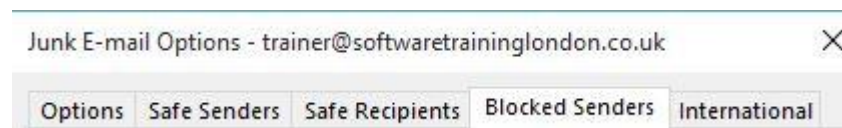
You can also configure Outlook so that it accepts messages only from people in your Safe Senders List. This configuration is in a click-box in the Options tab in Junk E-mail Options

## 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

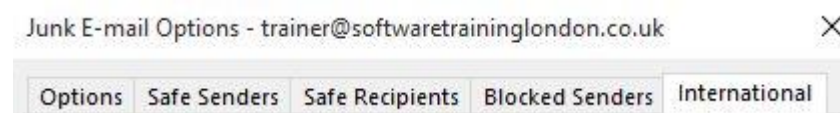


You can easily block messages from particular senders by adding their e-mail addresses or domain names to the Blocked Senders List. When you add a name or e-mail address to this list, Outlook moves any incoming message from that source to the Junk E-mail folder. Messages from people or domain names that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

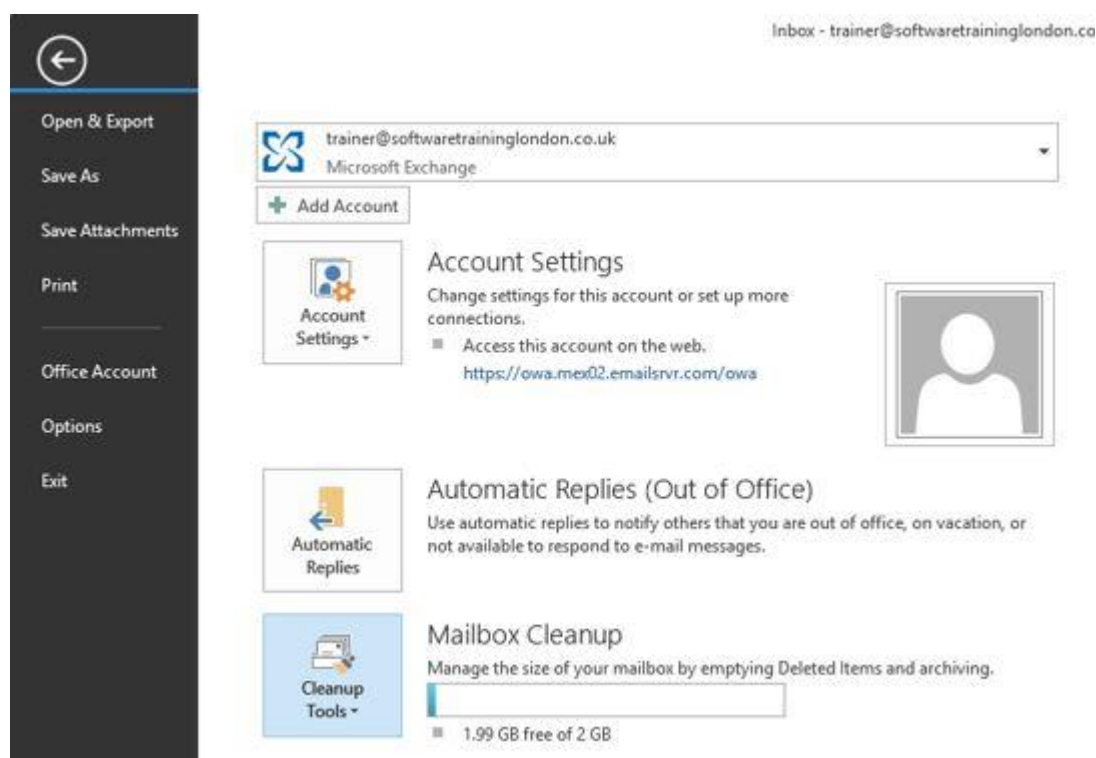
## International - Blocked Top-Level Domains List



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 **File Tab**, and under **info**.

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.

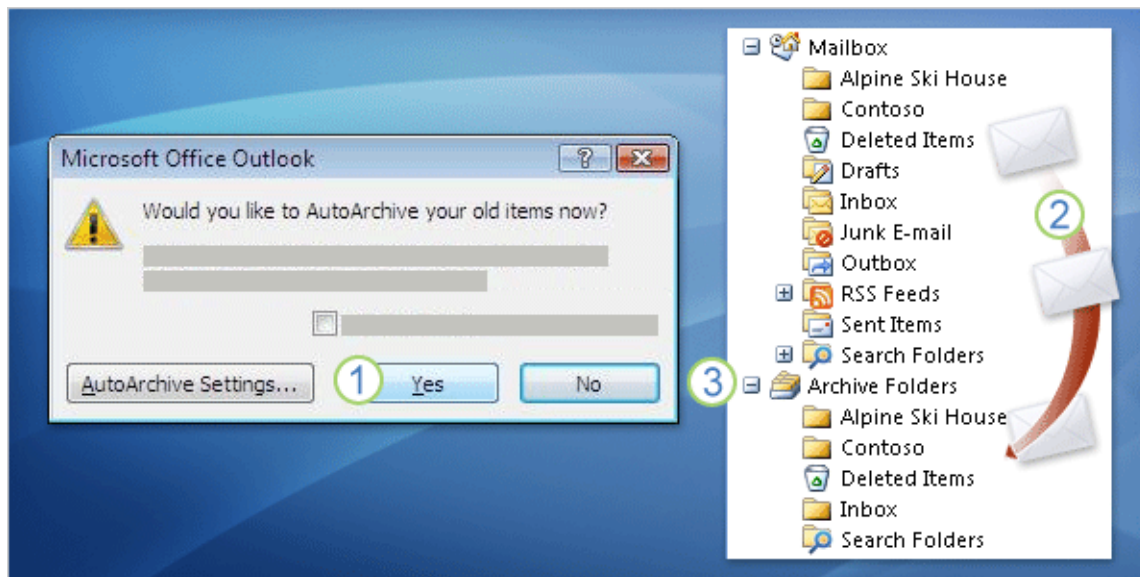
## Think before you store

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:

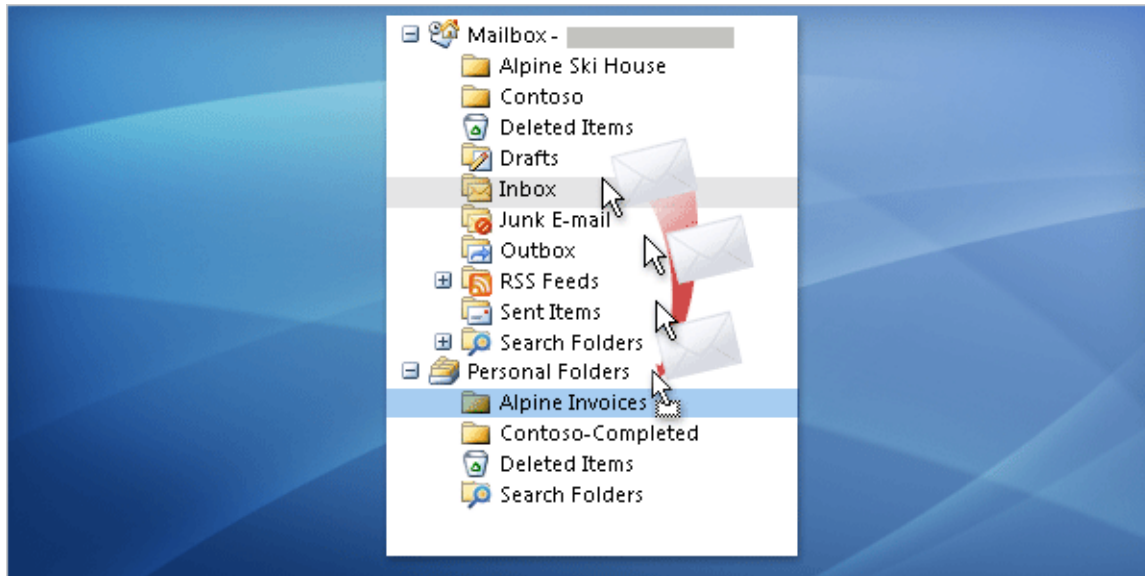
To start the process you click Yes.

Messages are moved from your Mailbox...

To a folder named Archive Folders.

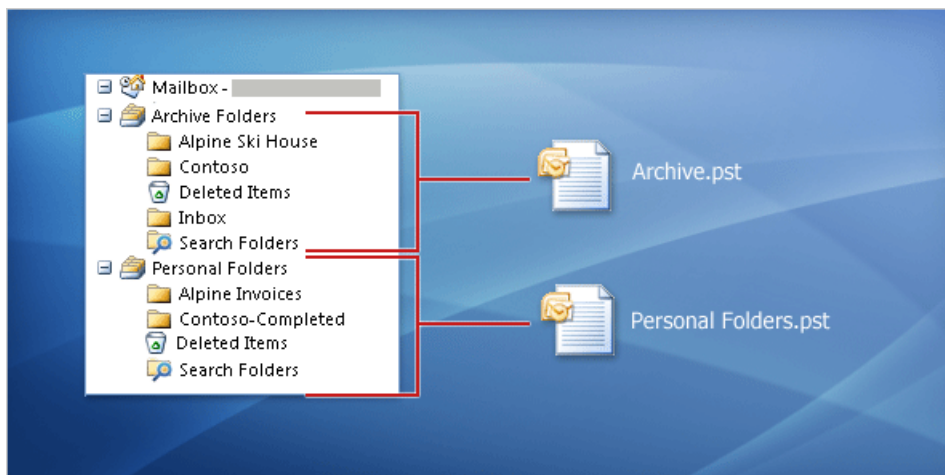
**Outlook creates this folder for you.**

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

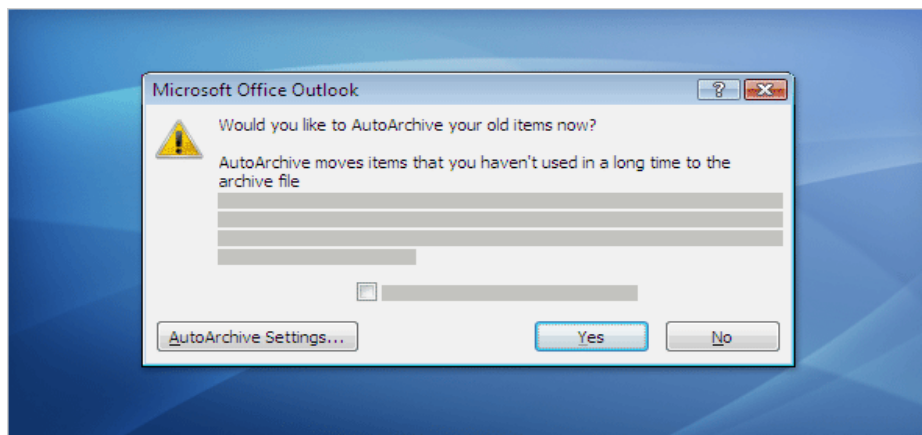


For **both Archive and Personal Folders**, messages are moved (not copied) to **an Outlook folder**. With both methods, you'll always be able to access your moved messages from a folder in the Navigation Pane in Outlook.



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).

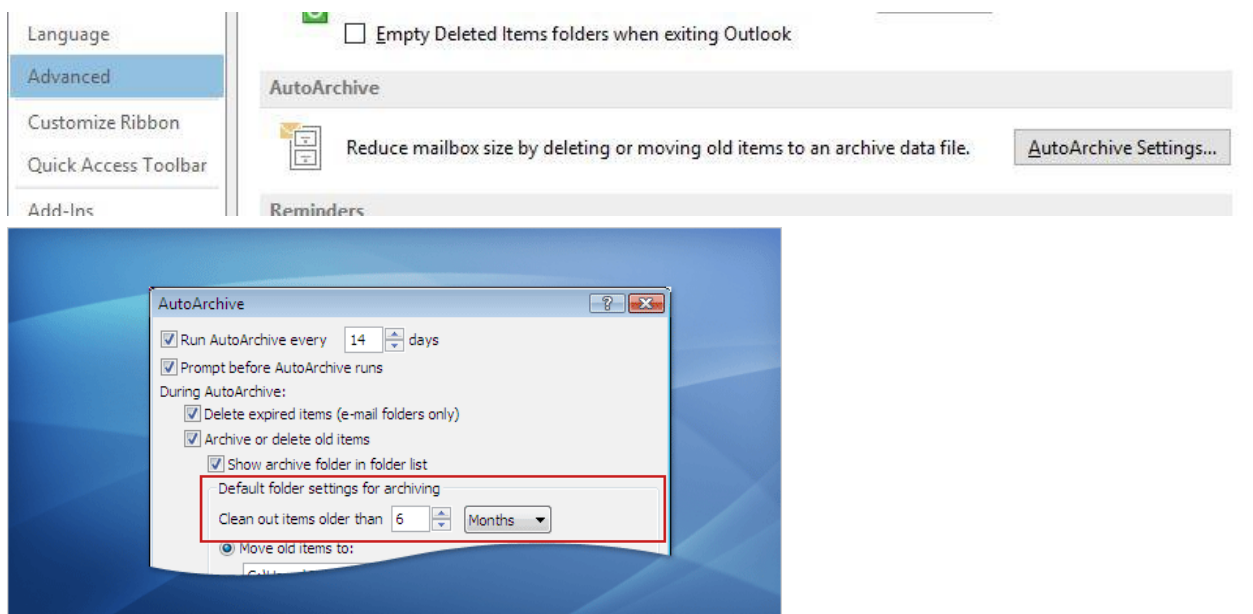
Use AutoArchive to move old messages to an Archive folder, automatically.



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

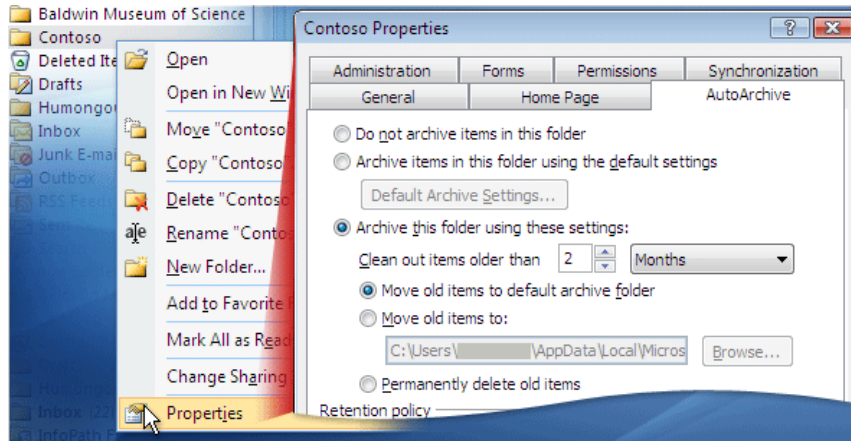
File Tab – Options – Advanced





**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 going to the **File Tab, Info, and Cleanup Tools**. You can then select **Archive** and once you have chosen your criteria click **OK**.

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

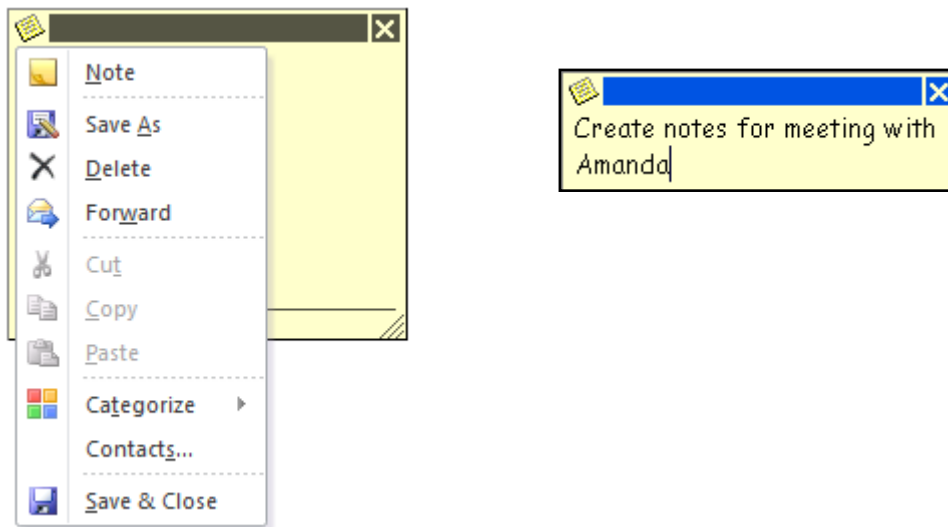
## UNIT 4 Folders

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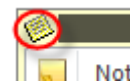
### The Notes Folder

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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, using Categorize.



To change colours click on the note symbol in the top right of the note



Select the **options** command in the **File Tab** and click '**Notes and Journal**' to modify **notes settings**.

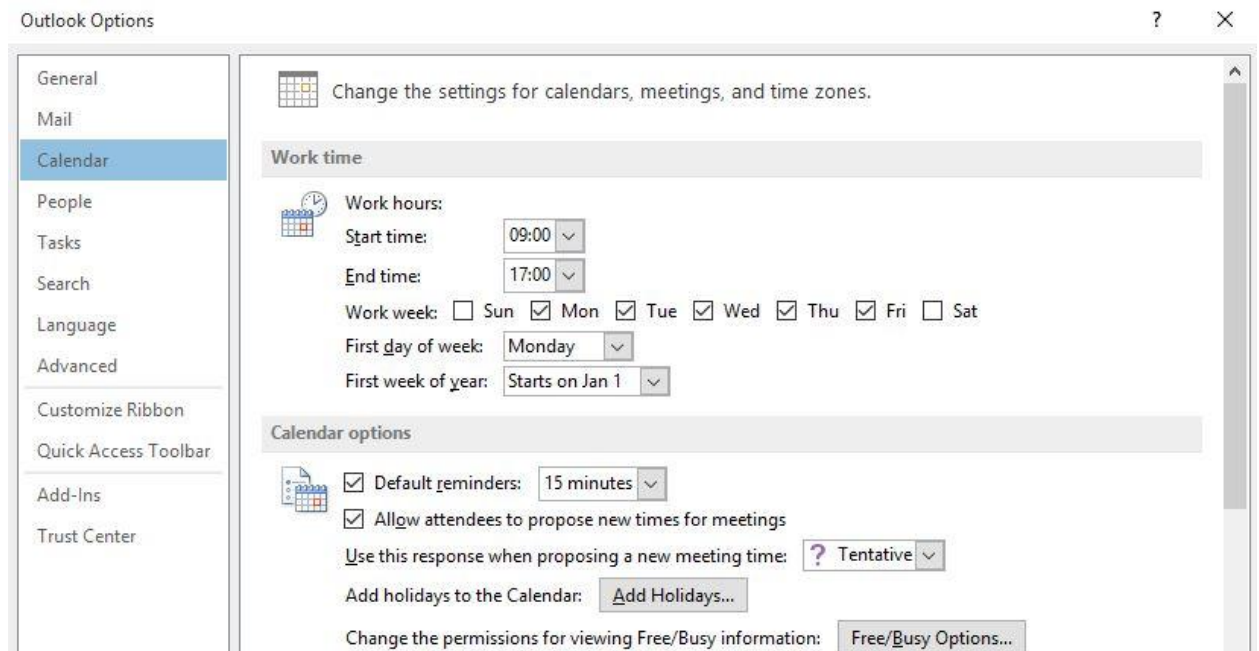
### The Calendar Folder

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The Calendar is a powerful tool and you can customise your calendar. To customise the calendar select the view tab and choose Change View / Manage view / select Calendar / Modify, this then allows you to change the formatting of the calendar as well as the view. Once finished Click OK

OR

**File Tab – Options – Calendar**



Calendar Preview – Snapshot email

Open a new message

Insert tab –Calendar

Select options

## Contacts Folder

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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:

File Tab – Options – Contacts

## Templates

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How to Create an E-mail Message Template

On the **File Tab**, point to **New**, and then click **Mail Message**.

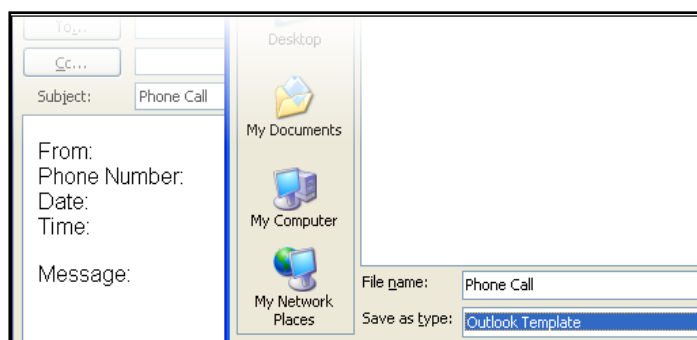
Type the **recipient**, **subject**, and **message** that you want.

On the **File Tab**, click **Save As**.

In the **Save As Type** list, click **Outlook Template (\*.oft)**.

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

Click **Save**.



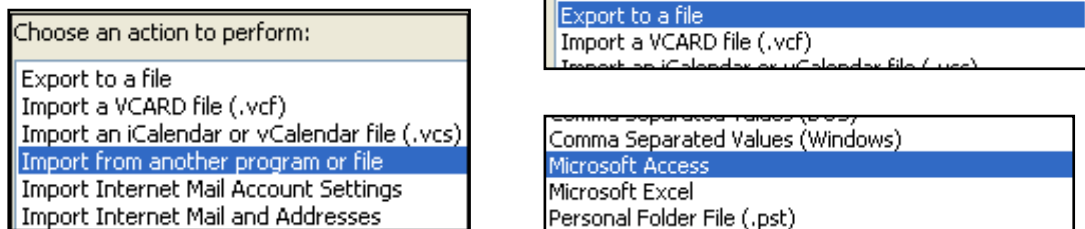
# Integration

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.

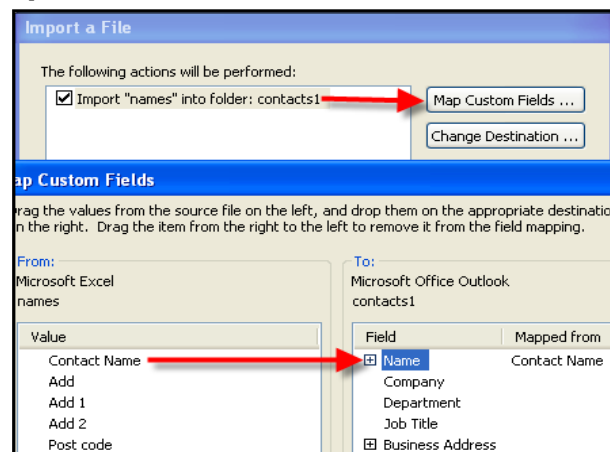
Importing and Exporting is in the File menu.

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.



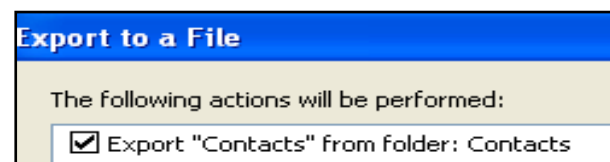
You have to **select the folder** that the information is going into or from, such as a **Contacts folder**. If you are **exporting** you have to choose a **file location** for where the file is going as well as telling it **what you want to save** it as, such as an **Excel spreadsheet or Access database**.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

To Import or export go to **File Tab / Open / Import**

## Using Folders to Share Information

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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.

Select an **existing folder** or the mailbox.

Select the **Folder Tab** and choose **New Folder**, or right click on a folder.

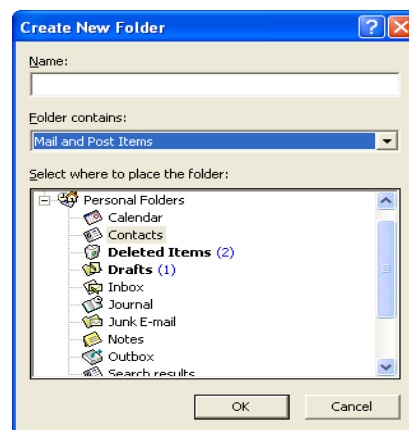
Choose **New Folder**

Enter a **name** for your folder in the Name box.

In the **Folder Contains** box, select the type of items you want to go in the folder, Mail, Contacts etc.

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

Click OK.



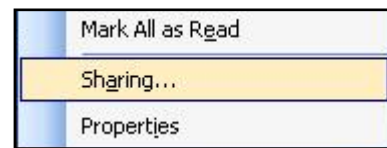
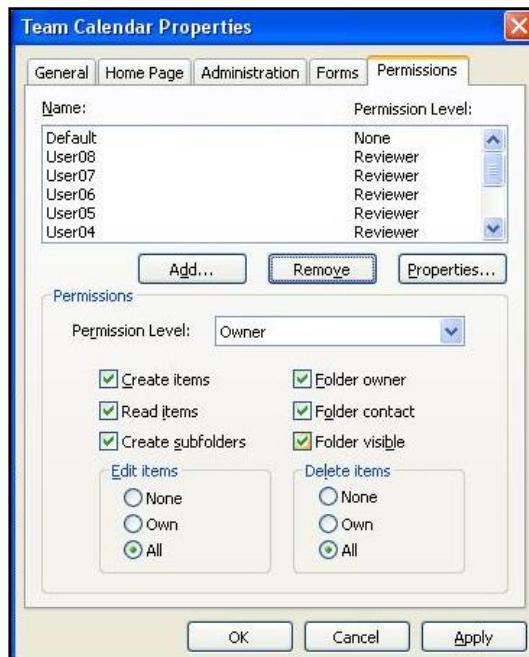
So

## Folder Permissions

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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 **Folder Tab / Folder Permissions** 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.

## E&OE

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