



National University of Ireland, Galway  
*Ollscoil na hÉireann, Gaillimh*

## **Beginners Guide**

**to**

## **Microsoft Outlook 2003**

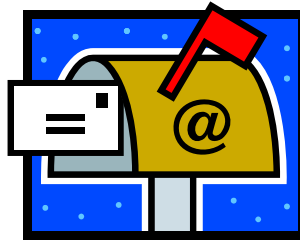


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## Introduction

This guide is intended for individuals who may be unfamiliar with Microsoft Outlook. The more advanced features of Outlook are not included. The guide begins by looking at different ways to view the Outlook screen. Other topics covered include: sending and receiving e-mail, contacts, calendars, saving and storing e-mail and using the Out of Office Assistant.



### New e-mail service at NUI, Galway

A new e-mail service for staff, based on the industry-leading Exchange platform from Microsoft, is currently at pilot stage. This service will be made available to all staff and research post-graduates from early in 2006, and in addition to providing staff with a reliable and secure e-mail service, it will offer a number of value-added features including calendar-sharing, nominated delegate access to email and calendars, meeting notices, a Global Address Book containing contact details for University staff, and access from certain mobile devices including BlackBerrys.

In conjunction with the core Exchange based service on campus, a web-based version of MS Outlook, Outlook Web Access (OWA), will allow staff to check and read their e-mail and calendar from any computer with internet access.

From January 1<sup>st</sup> 2006 all new staff joining the University will be provided with Exchange based e-mail. Subsequently, all current staff will be migrated onto the new service on a phased basis. As part of the migration service, we will facilitate the migration of your existing mail on Bodkin onto the new Exchange server. More details of the migration schedule for existing staff will be published on our website over the coming months.

Staff can use the following supported e-mail software to access Exchange-based e-mail:


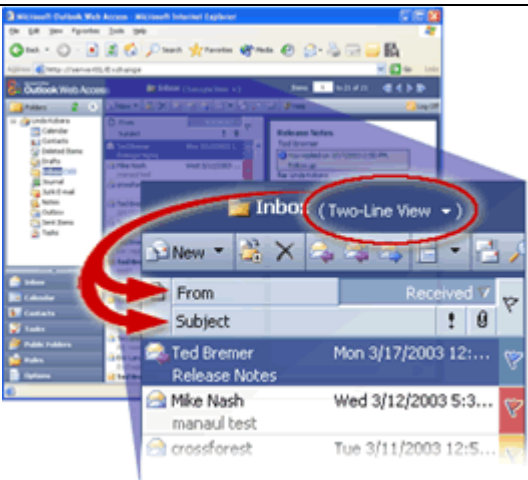
- Windows users must use Outlook 2003
- Macintosh users must use Entourage 2004
- All users also have the option of accessing e-mail over the Internet using Outlook Web Access while on-campus or off-campus.

### Online Documentation

For additional information on working with Outlook 2003, please visit the following webpage: [www.nuigalway.ie/csc/email/exchange](http://www.nuigalway.ie/csc/email/exchange)

## The Outlook Window

The Outlook window is broken up into three parts.

<p>1. On the left, the Navigation Pane lists mail folders with features and options below. Select <b>View, Navigation Pane</b> to <b>turn off/on</b>.</p> <p>Right click any item in the Navigation Pane for Navigation Pane options.</p> <p>Favorites Folders section: Any folder can be dragged to the Favorites Folders section.</p> <p>The Unread Mail folder contains unread e-mail. The Followup folder contains all e-mail flagged for followup.</p> <p><b>NOTE:</b> Deleting or moving e-mail from the Unread folder or the Followup folder deletes/moves the e-mail in the Inbox as well.</p>	
<p>2. In the centre, a Two-Line view contains a short description of your messages.</p> <p>The following message information is displayed in Two-Line view:</p> <ol style="list-style-type: none"> <li>i) From</li> <li>ii) Subject</li> <li>iii) Date received</li> <li>iv) Importance</li> <li>v) Attachments</li> </ol>	
<p>3. On the right, the Reading Pane displays the currently selected message. To switch to the classic bottom Reading Pane or turn the pane off entirely, select <b>View, Reading Pane</b> from the Outlook menu.</p>	

## Creating a Signature File

Outlook allows you to add a signature block to all your outgoing mail messages or to new messages only.

1. Select **Tools, Options** from the Outlook menu.
2. Click the **Mail Format** tab.
3. Click the **Signatures** button, then click **New**.
4. In the Create New Signature box, type a name for your signature file, then click **Next**.



5. In the Edit Signature box, type your name and any additional text, e.g. your department and extension number as you would like it to display in outgoing e-mail messages.
6. When you are done, click **Finish** then click **OK**. Ensure that the name of your newly created signature file is displayed in the “Signature for New Messages” portion of the Options screen. If you want a signature on replies and forwards, ensure the “Don’t use on Replies and Forwards” box is not selected.
7. Click **Apply**, then click **OK**.

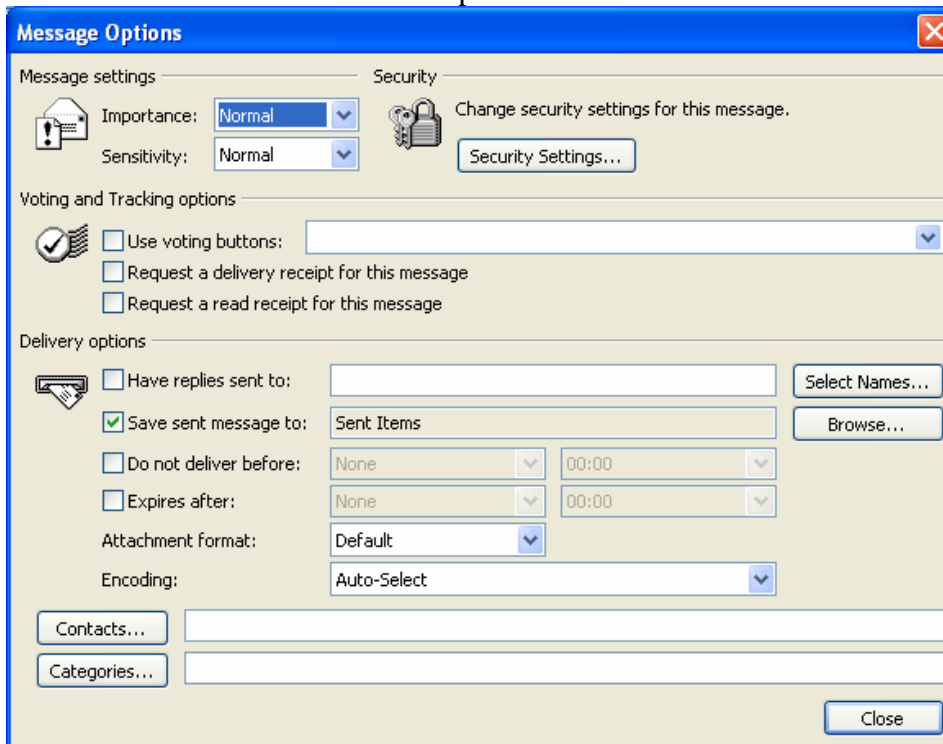
## Sending E-mail

With your Inbox displayed, click the **New** button on the Outlook toolbar, or select **File, New, Mail Message** from the Outlook menu. A blank message form displays.

1. Click the **To** button to display the Global Address List and/or your personal address book to select recipients. The Global Address List for NUI, Galway contains the addresses of all staff. If you type in the first letters of a person's surname, then all the corresponding matches in NUI, Galway will be returned.
2. Once you have selected a recipient from the Name box, click the To button to move the name to the Message Recipients box. Continue to select recipients in this manner. You may also select the names of individuals you want to carbon copy (cc) or blind carbon copy (bcc) at this screen. When you are done, click **OK**.
3. Type a brief description of your e-mail message in the Subject line. Click in the large message body box and type your message. Click **Send** when you are done.

## Message Options

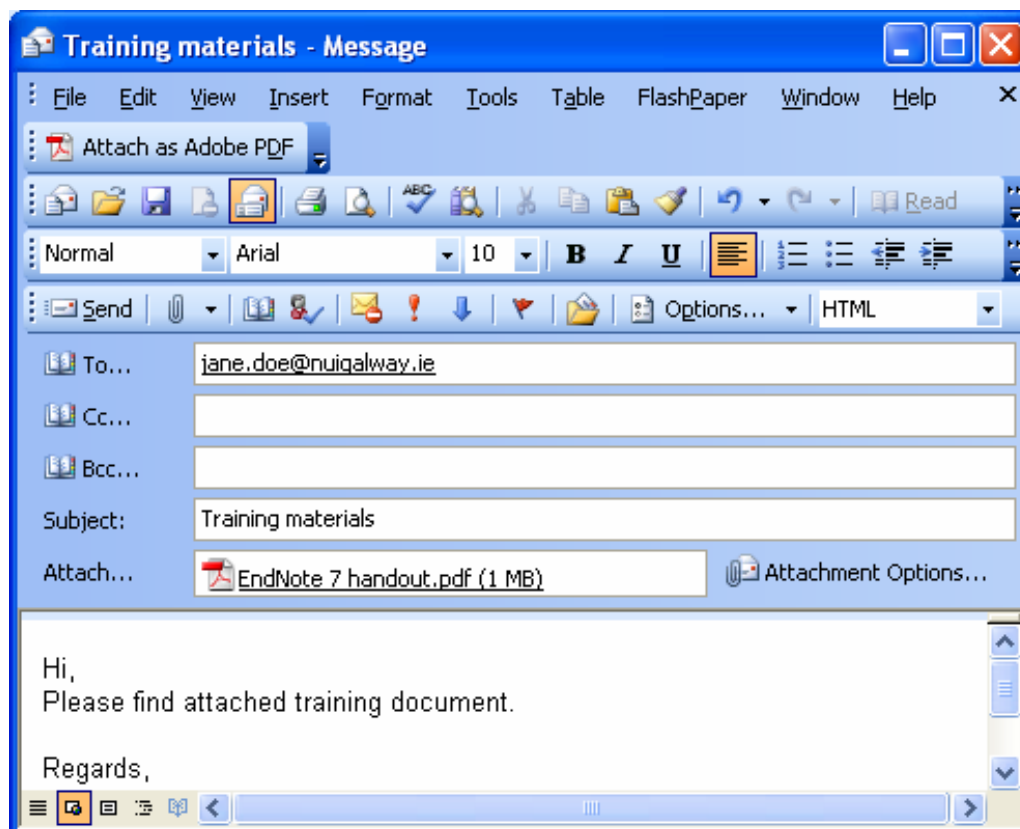
If you wish to receive a notification when your e-mail is delivered and/or read by the recipient(s), do this prior to sending the e-mail. Click the **Options** button on the message screen and then select the desired options and click **OK**.



You can alert the recipient as to the Importance/Sensitivity of your message by selecting the appropriate setting from the drop-down lists. Your e-mail will be flagged accordingly.

## Sending Attachments

If you want to send a file with your e-mail, click the **Insert File** button on the message screen. The Insert File button resembles a paper clip. Browse to the file you wish to attach. Once you have located the file you wish to send, select it and click **Insert**. The file name will display in the Attach field of the e-mail.



## Receiving E-mail

Incoming e-mail messages are stored in the Inbox. In Outlook, you don't need to refresh your mailbox to see if you have new mail – it will appear automatically. Messages that you have not yet read are displayed in bold font. In addition, messages that you have not yet read can be accessed through the “Unread Mail” folder. To read a message, double-click on the message.

## Reply to E-mail

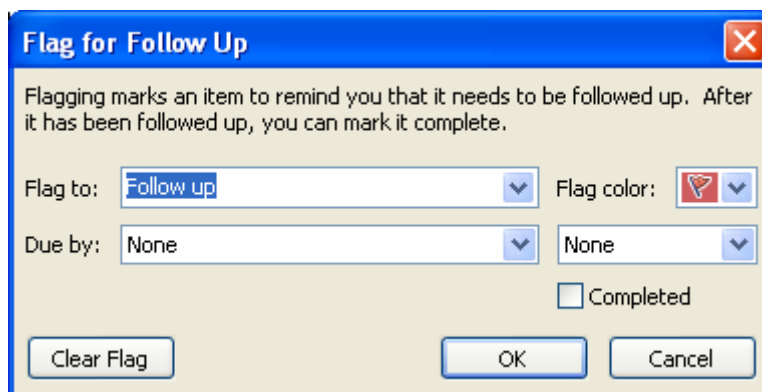
To reply to an open e-mail message, click the Reply button on the toolbar. The original sender will automatically be put in the To: line of the response, and you can add whatever text you want to the response before you send it. There is also a **Reply To All** button that allows you to reply to **all** recipients of the original e-mail, including those that were carbon copied and blind carbon copied.

## Forward E-mail

Clicking on the Forward button allows you to forward the e-mail to another individual. The e-mail displays in a new window and you must type or select the e-mail address of the desired recipient, type a message of your own if appropriate, and then click the **Send** button.

## Flag E-mail For Followup

You can place a flag on e-mail as a way to remind yourself that additional action needs to be taken. To flag an e-mail for followup, right click the e-mail message in your Inbox and select Followup, then select the colour flag you would like to use. You can also click “Add Reminder” to enter additional followup options.



## Additional Options

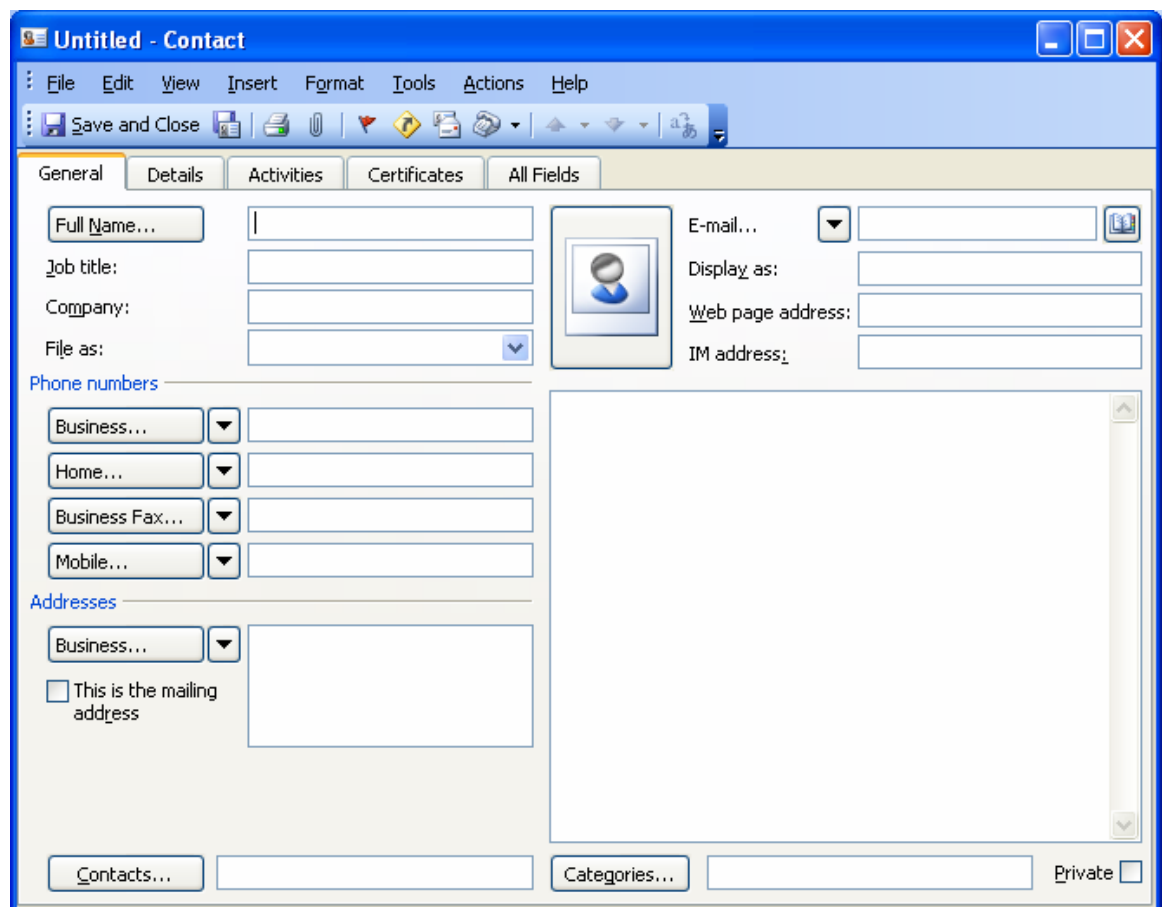
You may also print, copy and delete e-mail. Deleted e-mail is stored in the Deleted Items folder, which you must empty periodically. Empty the Deleted Items folder by right clicking the Deleted Items icon in the Navigation Pane and selecting Empty Deleted Items from the shortcut menu.

**NOTE:** Once you empty the Deleted Items folder, e-mail that was placed there is permanently deleted. Permanently deleted items can only be recovered within 7 days of deletion.

## Personal Address Books

You might wish to store frequently used e-mail addresses in a Personal Address book. The easiest way to do this is use Contacts.

1. From the menu, select **File, New, Contact**. The Contact dialog box will display.



2. Type the name of the contact, and the e-mail address (or click the Address Book icon next to the E-mail address field to select a name from the Global Address List.)
3. Any other information you enter is optional. When you are done, click **Save and Close**.
4. To select a Contact in a new e-mail message, click the To button in the message, then select Contacts from the Show Names In..field of the dialog box..

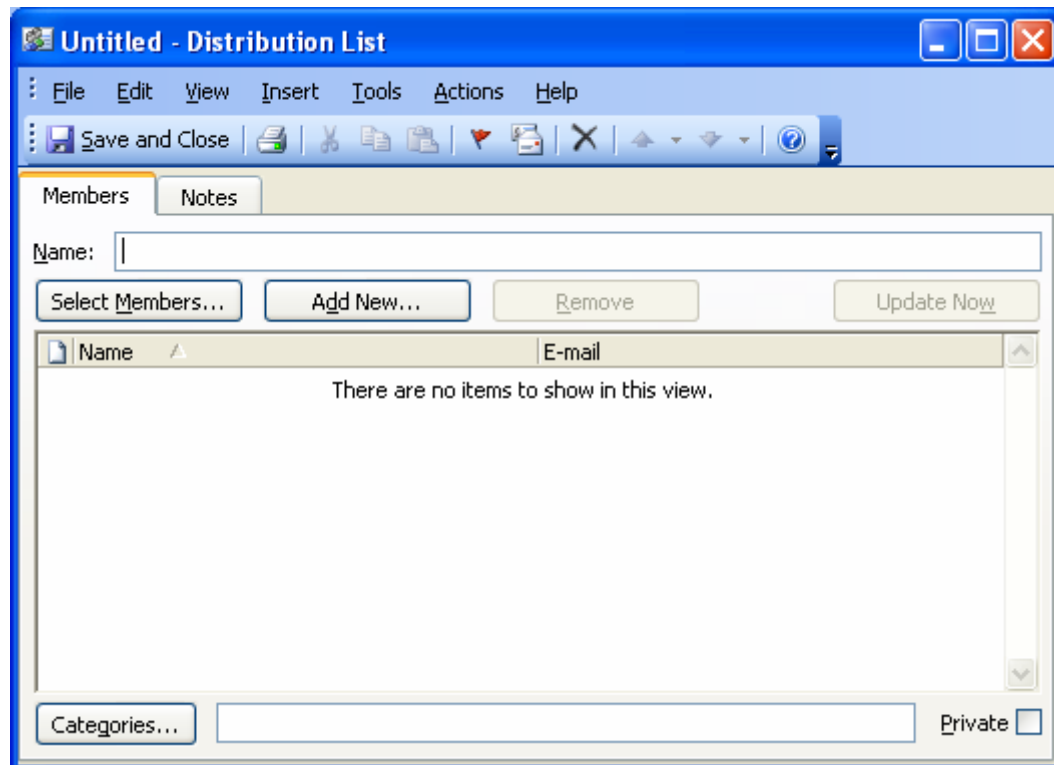
**NOTE:** If the Contact list does not display as an address book:

1. Click the Contacts icon at the bottom of the Navigation pane.
2. When the Contacts screen displays, right click Contacts under “My Contacts” and select Properties.
3. Select the Outlook Address Book tab and make sure that Show This Folder as an E-mail Address Book is checked.

## Distribution Lists

Distribution lists simplify the process of sending e-mail to groups. For example, if you frequently e-mail everyone in your department, you can create a distribution list for your department.

1. With the Inbox displayed, select **File, New, Distribution List**.
2. The Distribution List dialog box displays. Type a name for the Distribution list in the Name field.
3. Click **Select Members** to select members from the Global Address List or your personal address book.



4. Once the address list displays, click on the name of any individual you wish to add to the distribution list, then click the Members button. To select multiple names, hold down the Ctrl key while selecting names.
5. If the individual is not on the Global Address List, you can click Add New in the Distribution List dialog box. Clicking Add New displays a dialog box in which you type the display name and e-mail address of the individual you are adding to the distribution list.
6. Click **Save and Close** when you are done.

Distribution lists are stored in the Contacts folder. To use a distribution list when sending e-mail, click the To button on the e-mail message screen, then select Contacts from the “Show Names from the” field in the Select Names dialog box. Click on the name of your distribution list, then click To, then click **OK**.

## Out of Office Assistant

If you plan to be out of the office for a day or longer, you can use the Out of Office Assistant to automatically generate replies to any e-mail you receive while you are gone.

With the Inbox displayed, select **Tools, Out of Office Assistant**. Complete the dialog box and click OK when you are done. Outlook will automatically send the response you indicate for as long as "I am currently out of the office" is selected. When you return to the office, follow the above steps and click "I am currently in the Office" to turn off the Out Of Office Assistant.

## Saving and Storing E-mail

Personal folders allow you to move mail from the e-mail server to your computer, thereby reducing the chances of exceeding your mailbox's storage capacity.

**NOTE:** If you choose to store e-mail in Personal Folders, you must backup this information regularly.

## Creating Personal Folders

From the Inbox menu, select **Tools, E-Mail Accounts, View or change existing e-mail accounts**. Click **Next**.

Click **New Outlook Data File** button.

Select "**Office Outlook Personal Folders File (pst)**" and click **OK**.

In this next dialog box, you will select the location and file name for your personal folders. Click **OK**. You are returned to the E-mail Accounts screen. Click the **Finish** button. Your Personal Folders will now display in your Folder List.

Once you have created Personal Folders, you may create subfolders to categorise your mail. To create a subfolder, right click on "Personal Folders" and from the shortcut menu, select "New Folder". In the Create New Folder dialog box, name the folder. Make sure the "Folder contains" box indicates Mail and Post Items, and that Personal Folders is selected in the "Select Where to Place the Folder" box. Click **OK**.

## Moving Mail to a Personal Folder

You can select the messages and drag them to the appropriate personal folder.

Alternatively, you can select the message(s) you wish to move. Right click on your selection and select **Move to Folder** from the shortcut menu. Then select the appropriate personal folder from the list of folders that displays in the Move Items dialog box.



## Working with Calendars

### View Your Calendar

Click the Calendar icon in the Outlook Navigation Pane. You can use several views with the Calendar. The default view is the “Day” view. You can also see a “Work Week” which expands the Day view into a view of Monday through Friday.

### Create an Appointment

1. To schedule an appointment in your calendar, select **File, New Appointment** from the Outlook menu or double-click any empty place on the calendar.

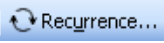
The screenshot shows the 'Untitled - Appointment' dialog box in Microsoft Outlook. The window title is 'Untitled - Appointment'. The menu bar includes File, Edit, View, Insert, Format, Tools, Actions, and Help. The toolbar contains icons for Save and Close, Recurrence..., Invite Attendees, and other options. The dialog has two tabs: 'Appointment' (selected) and 'Scheduling'. The 'Appointment' tab contains fields for Subject, Location, Label (set to None), Start time (Wed 02/11/2005, 16:00), End time (Wed 02/11/2005, 16:30), All day event (unchecked), Reminder (checked, 15 minutes), and Show time as (Busy). At the bottom, there are buttons for Contacts..., Categories..., and a Private checkbox.

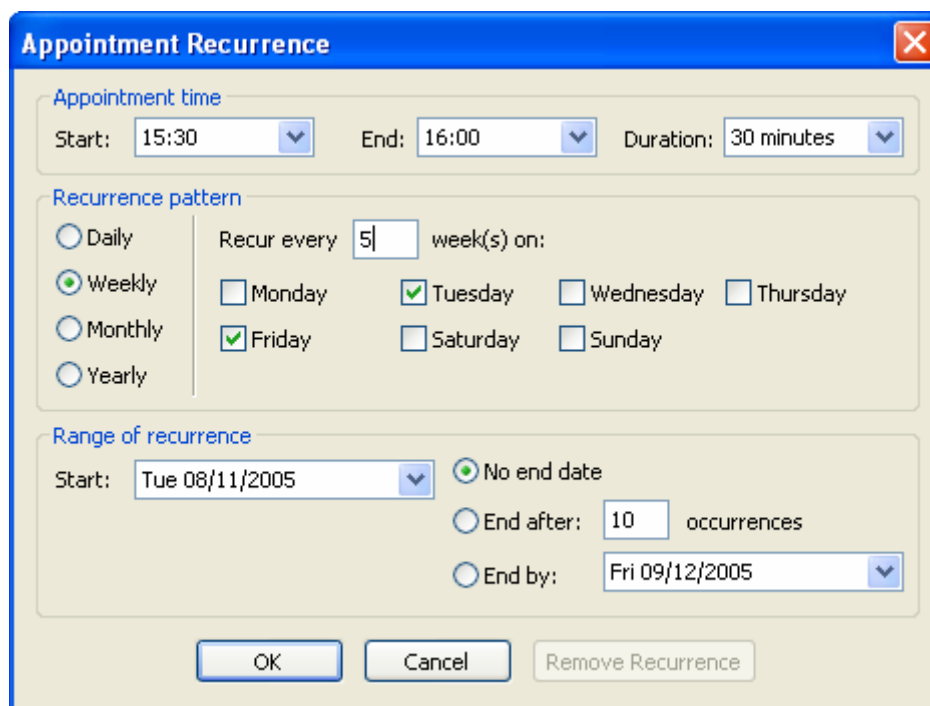
2. Complete the dialog box by entering a subject, location, etc. Click **Save and Close**. The appointment will display on your calendar.

### NOTES

1. If the Reminder box is checked, a visual and audio reminder of your meeting will display/sound prior to the meeting.
2. Use the **Show Time As** option to indicate whether you want the appointment to display as free time, busy time, tentative or out of office.

## Create a Recurring Appointment

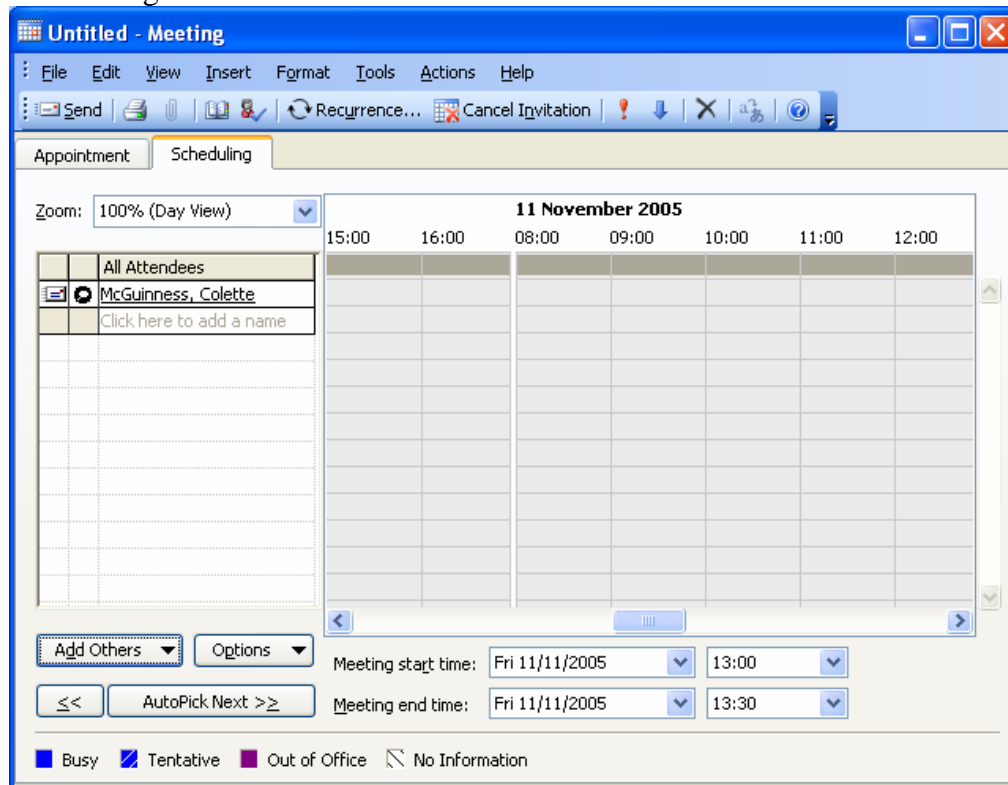
1. Select File, New Appointment from the menu  
OR  
Double-click an empty space on the Calendar screen.
2. Complete the dialog box by entering a subject, location, start and finish times.
3. Click the **Recurrence** button  on the toolbar.  
Select the frequency along with any additional options.



4. In the example shown above, a recurring appointment has been setup for every Tuesday and Friday for five weeks. Click **OK**.
5. At the appointment dialog box, click **Save and Close**.

## Schedule Group Meetings

1. Select **New, Meeting Request** from the menu.
2. The meeting request dialog box displays. Type a meeting subject and location. Select a desired start and end time for the meeting using the drop-down fields.
3. Click the **Scheduling** tab to see whether your desired attendees are available for the meeting.



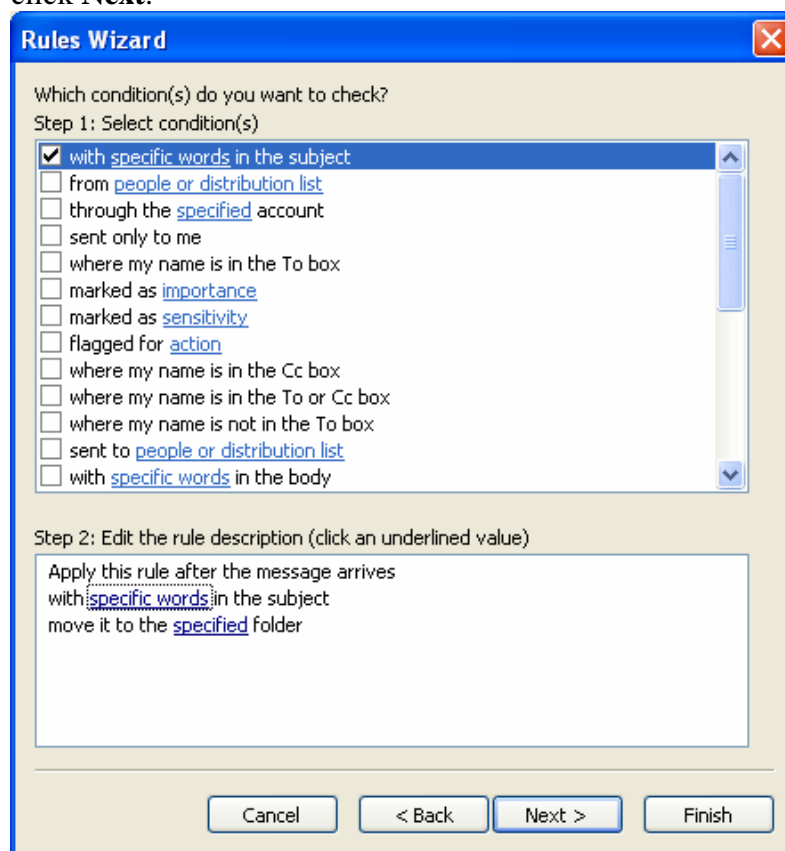
- As the meeting organiser, your name and calendar information will display.
4. Click the **Add Others** button.
  5. Select **Add From Address Book**. Select the names of your desired attendees from the Global Address List (or use your personal address book i.e. contacts, if you wish). As you select each name, Outlook will indicate whether the individual is free or busy during the meeting time.
  6. You may also be able to reserve resources such as meeting rooms. If the resource appears in the Global Address List, you can add it to the meeting. **NOTE:** You can make a request for a resource that you own (e.g. departmental meeting room) to be listed in the Global Address List – email [colette.mcguinness@nuigalway.ie](mailto:colette.mcguinness@nuigalway.ie).
  7. Click the **Appointment** tab, then click the **Send** button to mail the meeting request. The meeting is automatically added to your calendar. Your desired attendees receive an e-mail requesting that they accept or decline. As they accept or decline, you are notified, and if they accept, the meeting is added to their calendars.

## Rules and Alerts

The Outlook Rules Wizard allows you to setup customised rules that are applied to your incoming and outgoing e-mail based upon certain conditions. You can direct e-mails into different folders based upon their subject, sender, or content, and many other automatic functions to help you manage both your inbox.

**Example:** Create a Rule to move NUIGspam mail to the Junk E-mail folder.

1. From the menu, select **Tools, Rules and Alerts** and click the **New Rule** button.
2. Select “**Move messages with specific words in the subject to a folder**” and click **Next**.



3. In **Step 2: Edit the rule description**, click on “**specific words**” and type in **NUIGspam**. Click **Add** and then click **OK**.
4. In **Step 2: Edit the rule description**, click on “**specified**” and select the **Junk E-mail** folder and click **OK**.
5. Click **Next** and then click **Next** again to step through the remainder of the Rules Wizard.
6. Specify a name for the rule and then click **Finish**.
7. You have now created a rule whereby all messages with the word “NUIGspam” in the subject are automatically moved to the Junk E-mail folder.