

Outlook: Email Basics

Academic Computing Services

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Abstract: Outlook is a messaging and collaboration client for easing the task of managing your electronic mail, personal calendar and group scheduling. Personal information such as contacts and tasks, custom collaboration and information-sharing applications allow a user to keep track of what they are doing. Outlook helps users organize, find and view all of this information — all in one place — using a consistent interface.

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Introduction

Outlook is an information management program that coordinates email messages, calendars, contacts, and tasks. Outlook communicates with the Exchange server to give you the ability to share information with others. This “Exchange environment” offers users sophisticated ways to collaborate such as group scheduling and public folders. All information related to your email is stored on the Exchange server. This allows you to access your email from anywhere there is a network connection.

Outlook is different than Outlook Express, which is part of Internet Explorer, the popular Internet browser. Outlook Express is limited to email and news such as sending and receiving Internet email, maintaining an address book, and communicating with Internet newsgroups. Outlook Express is simpler to set up and use if you only need to read email and news. Outlook, however, has more advanced features such as calendaring, tasks, and public folders.

With Outlook Web Access, another way to access the KU Exchange server, you can use any Web browser to gain secure access to your Exchange account. KU's Outlook Web Access site is <http://www.mail.ku.edu/>. The Web client looks similar to your desktop client, with the exception of the Web browser toolbars at the top and bottom of the window. (A copy of the Outlook Web Access handout can be found at: <http://www.ku.edu/acs/docs/>.)

Other client email programs can access email messages stored on the KU Exchange server, such as Outlook Express and Eudora. Using these client email programs only gives you access to your mail on the Exchange server, nothing else.

Objectives

In this course, participants learn the fundamentals of using Outlook's email. Upon completion of this course the participants should be able to:

- navigate the Outlook application window.
- view and sort email in different ways.
- create, forward and reply to email messages.
- send and receive attachments.
- maintain information about your contacts.
- use distribution lists to contact a group of people with one email message.

Although this handout is prepared with Outlook 2002, those using the Outlook 2000 client should be able to do almost all of the features listed. If you are interested in downloading the Outlook 2002 (for Windows) client, visit www.ku.edu/exchange/outlook.

Prerequisites

It is assumed that the participants in this workshop know how to use the Windows 95/98 operating system to maintain files and directories/subdirectories.

Related Training Available from ACS

All workshops offered by Academic Computing Services (ACS), a division of Information Services, are free to KU students, staff, faculty, and approved affiliates.

To learn more about or register for workshops, receive automatic announcements of upcoming workshops, and track workshops you've registered for and have attended, visit the ACS Web site at www.ku.edu/acs/train. You can also check our online schedule at www.ku.edu/acs/schedule for a list of class offerings and their availability. For further workshop related questions, please email training@ku.edu.

Definitions

Term	Definition
Information viewer	The section of an Outlook window displaying a specific type of item. Each folder has an Information viewer that displays information regarding that folder.
Item	Any piece of information created in Outlook, such as an email message, a contact, or an appointment.
AutoPreview	Outlook's capability to display the first three lines of a message without you opening the message.
Contacts	The folder that contains information on your business or personal contacts: names, phone numbers, email addresses, faxes, and much more.
Drafts	The folder where draft messages are saved. Outlook automatically saves a draft copy of any incomplete message every three minutes.
Global Address Book	This database contains a list of user names, email addresses, phone numbers and department information. The KU global address book contains information for faculty and staff on the Lawrence campus and at the University of Kansas Medical Center. The Lawrence addresses include everyone on the Exchange system and everyone with a registered email address.
InfoBar	An informational line that appears below the toolbar on a message form. The InfoBar provides information about what has occurred or what the user needs to do with a message. When you reply to a message containing an InfoBar, then a note appears in the InfoBar indicating the date and time that you replied.
Outbox	The folder where messages created offline are stored until they are sent. When they are sent the messages are automatically moved to the Sent Items folder.
Outlook Bar	A toolbar that contains shortcuts to frequently used folders in Outlook.
Outlook Web Access (OWA)	Web site accessible with any java-enabled browser that provides access to email, calendaring and public folders on the Exchange server. OWA at KU is at http://www.mail.ku.edu

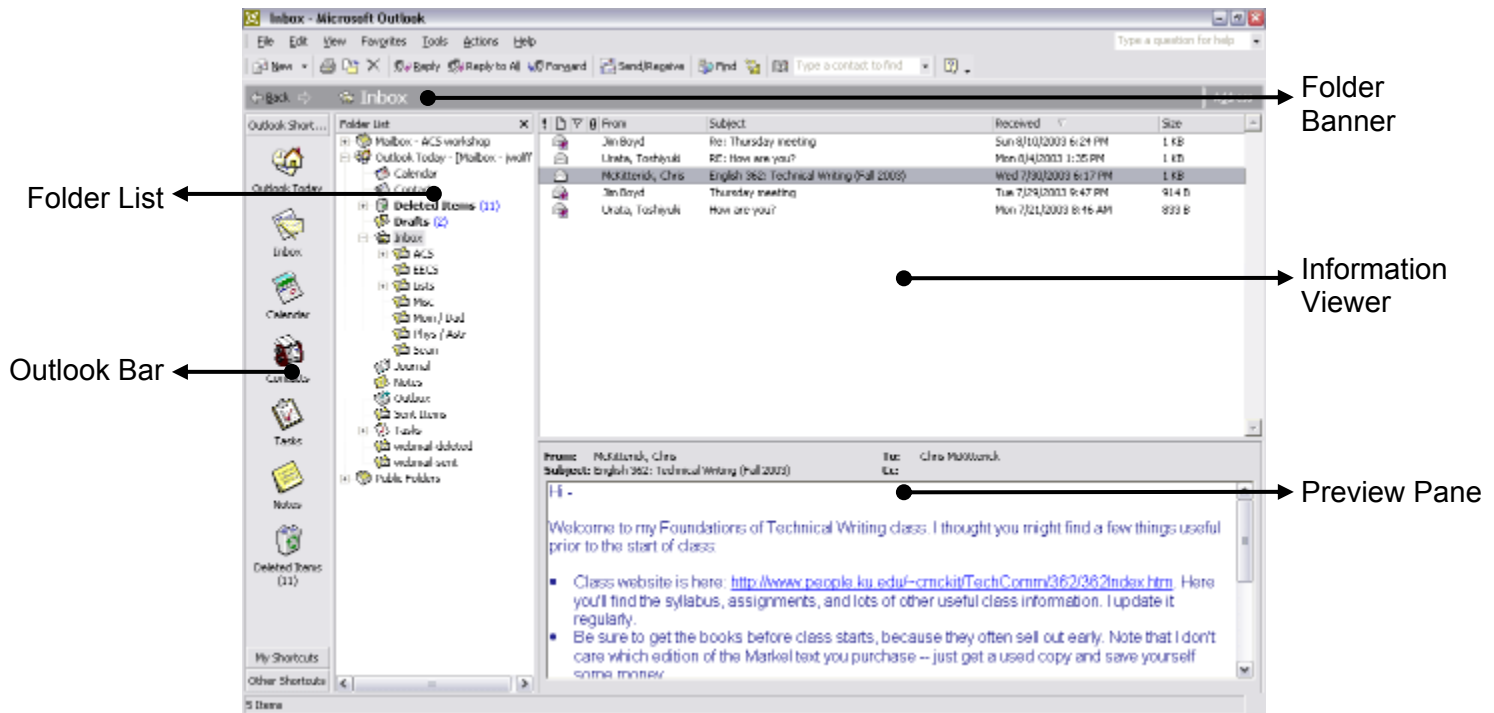
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Preview Pane	An area within the Inbox Information viewer that contains previews of received messages.
Sent Items	The folder where messages that have been sent are stored.
Personal Distribution Lists	A distribution list is a collection of contacts. It provides an easy way to send messages to a group of people. When a message is sent to a personal distribution list, recipients see their own names and the names of all other recipients on the To line of the message instead of seeing the name of the distribution list. You maintain this type of distribution list.
Exchange Distribution Lists	A distribution list is a collection of contacts. It provides an easy way to send messages to a group of people. When a message is sent to an Exchange distribution list, recipients see the name of the distribution list on the To line of the message instead of seeing the names of each individual. This type of distribution list is maintained by the Exchange Server, making updates automatically on a nightly bases.

Outlook window

When you start Outlook, your Inbox appears listing the email messages you have received. The icons in the vertical Outlook Bar, to the left of the Inbox Information viewer, represent shortcuts to frequently used Outlook folders and features.



The Outlook Inbox

The Outlook Bar provides shortcut icons to your most frequently used folders. You can add, remove, or change the size of a shortcut icon. Shortcut icons are displayed in groups to assist in organizing information. You can also add or remove groups from the Outlook Bar or reorganize them to meet your work patterns. The default groups include *Outlook Shortcuts*, *My Shortcuts*, and *Other Shortcuts*.

When you choose an icon in the Outlook Bar, Outlook opens the folder associated with that icon and displays the items contained in the folder in the Information viewer.

The Folder List, another way to open a folder, contains Outlook's default folders, personal folders, and Public Folders. Simply click on the folder name in the Folder List and the folder contents appear in the Information viewer. You can easily check the size of a folder by right-clicking the folder name, selecting **Properties** and then clicking **Folder Size....**

When a folder is opened that folder's default view appears. Views display information in a way that allows the user to quickly evaluate the information in a folder. Each folder has alternate views. You can select an alternate view for the folder displayed by clicking the **View** menu, pointing to **Current View**, and then selecting one of the choices from the submenu. In addition to the views supplied by Outlook, you can design your own view.

Anything created in Outlook is called an item. Each appointment, event, meeting, contact, received message, sent message, and so on, is an Outlook item. Items are stored

in folders. Outlook displays the items in a folder, which you view with the Information viewer. The Information viewer displays only some of the information for an item. Double-click the item to display more detailed information. When you do so, the item is displayed in the form in which it was created or saved. To return to that folder's Information viewer, click the close button on the window for the item being displayed.

All of the groups in Outlook work together enabling you to drag-and-drop items from one folder to another. Almost everything in Outlook is customizable by clicking the **Tools** menu and selecting **Options...**

Using the Outlook Bar

Each Information viewer displays the Outlook Shortcuts Bar at its left edge. Click the shortcut icons in the Outlook Bar to select which Information viewer you want to see.

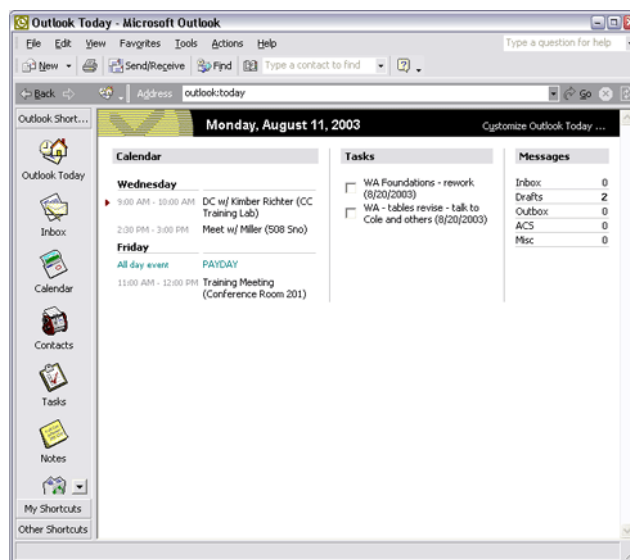
Note: If the Outlook Bar is not showing, click the **View** menu and select **Outlook Bar**.

The Outlook Bar contains three default groups: *Outlook Shortcuts*, *My Shortcuts*, and *Other Shortcuts*. Only one group displays at a time. Click the name of the group to display that group's shortcuts. The Information viewer does not change, only the shortcut listing. The name of each shortcut identifies an Outlook folder. Click a shortcut and the Information viewer changes to show the information contents of that folder.

Outlook Today

Outlook is the name of the desktop application. Outlook Today is the name of the Outlook window that displays a summary of the information that's relevant to today and the next few days. To view the Outlook Today window, click on the **Outlook Today**

icon  on the Outlook Shortcuts Bar.



Outlook Today

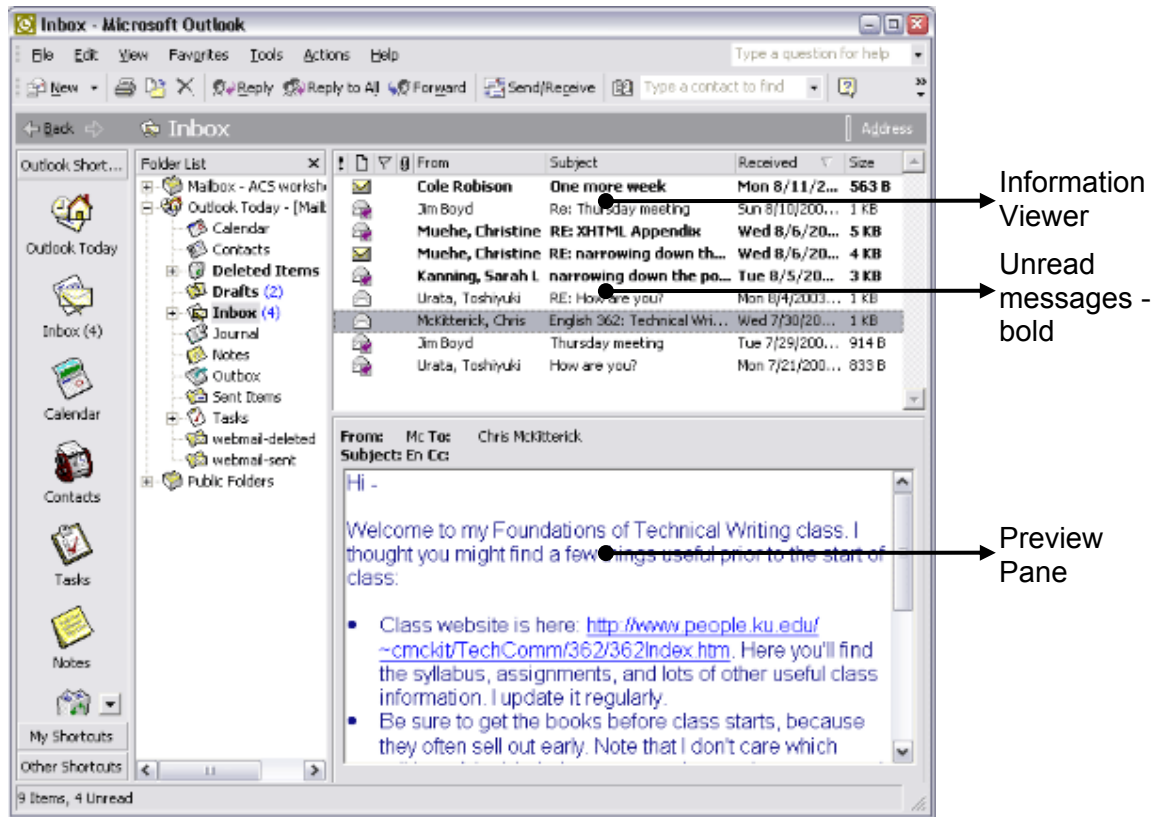
Today's date appears at the top of the Outlook Today window. The left side of the Outlook Today window shows a list of items on your calendar for today and the next few days. You can click any item on the list to see the details about that item. There is a list of your current tasks with the date each task is due. You can click any task to see the details of that task. It also shows how many unread messages are in your Inbox folder, how many drafts of messages are in your Drafts folder, and how many messages are waiting to be sent in your Outbox folder.

Inbox folder

Outlook makes it easy to receive incoming email messages and view them by putting them into the Inbox. You can manage email by creating, sending, reading, responding to, and forwarding messages from the Inbox. The number in parenthesis beside the Inbox shortcut icon tells you how many unread messages you have. A message that has not been read appears in **bold**. A message that has been read appears as regular text. The default Information view for the Inbox is messages with the Preview Pane displayed.

The Preview Pane allows you to view the entire contents of a message without having to open the message. To view a message in its entirety, double-click the message.

To adjust the amount of viewable text in the Preview Pane position the mouse pointer on the horizontal line that separates the message list and the Preview Pane. When the mouse pointer changes to a two-headed arrow, drag it up or down to display the contents of both panes, as you would like them to appear. You can turn the Preview Pane off by clicking the **View** menu and selecting **Preview Pane**.




The Inbox Information Viewer and Preview Pane

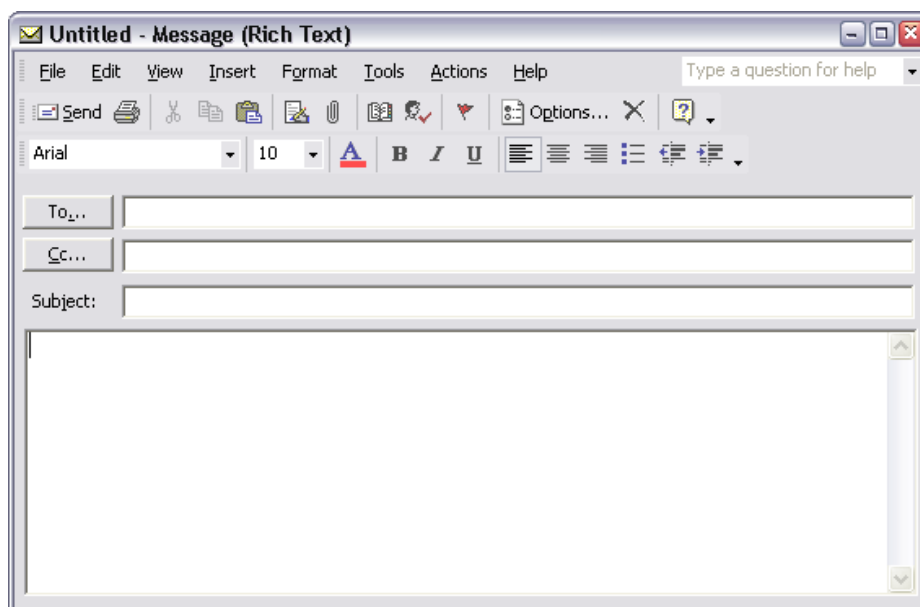
The Exchange server notifies you immediately of any new messages.

Note: You can also have Outlook provide a text notification. Click the **Tools** menu and select **Options....** On the Preferences tab, click **E-mail Options....** Then click **Display a notification message when new mail arrives.** Click **OK** until you have closed all the dialog boxes.

Creating a message



The new Untitled-Message window is a form you complete for each message you send. When you are composing messages, put the most important or compelling information at the top of your message.

1. With the Inbox Information viewer displayed, click **New** . A new Untitled-Message form appears.



A new message

2. In the *To...* field, type the email address of the person to whom you are sending the message. If sending to more than one person, separate the email addresses by commas (,) or semicolons (;). (Example: *imajhawk@ku.edu, friend@aol.com*)

Note: You must enter the full Internet address (username@server.com), or another Outlook user's ID (mjones) or full names (Mary Jones). You can also click **Address Book**  or **To...**  to select names from the KU Global Address List or your Contacts folder.

Outlook automatically checks the names you type in the *To...*, *Cc...*, and *Bcc...* fields against the names in your Contacts folders and the KU Global Address List. A number of things might happen to the name(s) in the *To...* field.


- If an exact match is found, the name is underlined.

- If multiple matches are found, a red, wavy line appears under the name. Right-click on the name to see the matches.
 - If Outlook doesn't recognize the name or address as being an email address (username@server.domain), the name is left as you entered it either without an underline or with a wavy red line under it.
 - If it is a name you have used before, Outlook automatically tries to complete the email address for you. You might be provided with more than one option if there are several people with the same type of name.
 - If Outlook doesn't find the person or email address in your Contacts, but does recognize the address as being an acceptable Internet email address, Outlook simply underlines the address you typed.
3. Type the names of the people to whom you want to send courtesy copies to in the *Cc...* field.

Note: The *Bcc...* (Blind Carbon Copy) field is where you enter names of recipients who will receive a copy of a message but whose address will not appear in the list of message recipients. To view the *Bcc...* field, click the **View** menu and select **Bcc Field**.

4. In the *Subject:* field, type a brief, informative description for your message. When you tab to the next field, the Message Window's title bar changes to reflect what you typed in the subject field.
5. In the large blank area, type your message. Outlook allows you to format the text of your messages.

Note: If you type a web address (<http://www.ku.edu> or www.ku.edu), Outlook automatically creates a hyperlink in the Windows version. The hyperlink text appears blue and underlined.

6. To add an attachment to the message, click **Insert File** . The Insert File dialog box appears listing the contents of the *My Documents* folder. Locate and select the file you want to send with the email and click **Insert**. An icon with the filename you selected appears in the message at the point of the cursor.

7. If you want to assign a Contact or a Category to the message, click **Options...**

 **Options...** on the toolbar. From the Message Options dialog box you can:


- Click **Contacts...** to assign a contact whether the message is addressed to them or not.
- Click **Categories...** to assign as many categories you'd like to the message.
- Click **Close** to return to the message form.

Note: *Under the Options section, you have several other options for marking outgoing messages.*

- **Message Importance.** *This helps the recipient(s) of your message(s) determine when they need to read and/or respond to*
-

the message. You can send messages marked as High, Normal, or Low importance. The default is Normal.

- **Message Sensitivity.** *You can mark a message with one of four sensitivity levels to help the recipient know if the message needs special handling. You can mark messages as Normal, Personal, Private, or Confidential. The default is Normal.*
 - **Voting.** *Incorporate voting buttons into messages you send. For example, query people as to whether or not they would like a review session on next year's budget changes and have them use voting buttons to return answers to you. The recipient must view the message containing voting buttons in a separate window in order to view the buttons. A special notice appears in the Preview Pane of the recipient indicating the message contains voting buttons.*
 - **Tracking.** *Ask to be notified when the message has been delivered or when the message has been read.*
 - **Delivery Options.** *Choose who receives replies to your email (if not you), choose where incoming mail is stored, and other options.*
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8. When you are done creating the message and ready to send it, click **Send** .

Outlook automatically puts a copy of your sent message in your Sent Items folder.

Replying to a message

When you respond to another person's message, you can reply to the sender only or reply to all message recipients if the message was sent to others in addition to you.

1. To reply to only the author, click **Reply**  or, if the message was sent to multiple recipients, you may want to reply to them all by clicking **Reply to All**

 **Reply to All**

Tip: When using the Reply to All option, be sure that everyone who received the original message really needs to see your reply.

A message form appears with the following:

- The sender's name (and/or all recipients' names) automatically appears in the *To...* field.
- The *Subject:* field of the original message is retained, with the abbreviation "RE:" in front of it.
- The text of the original message is part of the reply.
- Signatures are not automatically inserted in reply messages but you can add a signature to a reply message. The signature is inserted at the point of the cursor, rather than at the end of the text you are replying to. To insert a signature, make


sure the cursor is blinking where you want the signature added; click the **Insert** menu and point on to **Signatures**, then select a signature from the submenu.

2. In the message area, type your reply message. Your reply appears in blue text above the original message unless you relocate the cursor.
3. When you are finished typing your reply, click **Send**.

Note: Reply messages do not automatically include file attachment(s) that may have been included with the original message. Outlook simply lists the name(s) of the file(s) attached to the original message. However, it is possible to attach the original attachment(s) by forwarding the message instead of replying.

Forwarding a message

When you forward a message, you actually create a new message, which contains a copy of the original message and its file attachments if any. The original message remains in your Inbox and a copy of the forwarded message is placed in the Sent Items folder. You can delete the original message or store it in any folder.


1. Open the message or select it in the message list.
2. Click **Forward** . A message form appears with the following:
 - The *Subject*: field of the original message is retained, with the abbreviation “FW:” in front of it.
 - The text from the original message is part of the message.
 - Signatures are not automatically inserted in forwarded messages, but you can add a signature. The signature is inserted at the point of the cursor, not at the end of the original message.
3. In the *To...* field, type the name of the person to whom you want to forward the message to or open the Address Book to select a name.
4. In the message area, type your message. It is a good idea to include your own introductory message when forwarding a message.
5. When you are ready, click **Send**.

Tip: You can change how the original message text is displayed when forwarding or replying to messages or choose not to include the original message text at all. From the Main window, click the **Tools** menu and select **Options...** The Preferences tab should be displayed. Click **E-mail Options...** In the “On replies and forwards” section, click the down arrow under the “When replying to a message” or the “When forwarding the message” fields to select your preferred option from the menu.

Printing a message

Printing email messages is very much like printing any other document.

1. Open the message or select it in the message summary list.
2. Click the **File** menu and select **Print...** By selecting Print from the File menu, you have the ability to change any print options that you want.
3. After you make any adjustments you want to the Print dialog box, click **OK** to print the message.

Alternatively: You can open or select the message you want to print and click **Print** . By using this method, the message is automatically printed without showing you the Print dialog box.

Signatures

Your messages can be enhanced with a custom signature. A signature is a block of text that contains your name and contact information that can be added to the end of any message you send. Outlook allows you to create and add several different signatures to your messages.

Creating a signature


1. From the Main window, click the **Tools** menu and select **Options...** The Options dialog box appears.
2. Click the **Mail Format** tab.
3. Click **Signatures...** The Create Signature dialog box appears listing any signatures you may already have created.
4. Click **New...** to start the Create New Signature Wizard.
5. In the *Enter a name for your new signature:* field, type a name for the new signature.
6. Click **Next**. The Edit Signature dialog box appears.
7. Type your signature text in the large empty box where the blinking cursor is.
 - To apply text formats, select the text and then click **Font**. Click **OK** when you are done changing the Font.
 - To align the signature text or add bullets, select the text and then click **Paragraph**. Click **OK** when you are done changing the alignment.
8. Click **Finish**. The Signature Picker dialog box reappears listing the new signature.
9. Click **OK**. The Options dialog box reappears.
10. On the *Mail Format* tab, under the *Signature* section, the *Signature for new messages:* field should list the default signature you want. If not, click the down arrow next to the field to select the signature you want. If you do not want a signature automatically added to new messages, select **<None>**.

11. By default, Outlook does not put signatures at the end of messages you reply to or forward. If you want a signature added automatically to these types of messages, the **Signature for replies or forwards** field should list the signature you want. If you do not want a signature automatically added to new messages, select **<None>**.
12. Click **OK**.

If you selected a default signature, Outlook automatically includes that signature when you open a new Untitled-Message window.

Manually adding a signature to messages

You don't have to have your signature automatically added to all your outgoing messages. You can choose which messages get your signature or not.

1. Create the message.
2. When you are ready to add the signature, click **Signature**  or click the **Insert** menu and point on to **Signature**.
3. Select a signature from the submenu.
4. When you are ready, click **Send**.


Editing/Removing a signature

1. From the Main window, click the **Tools** menu and select **Options....** The Options dialog box appears.
2. Click the **Mail Format** tab.
3. Click **Signatures....** The Create Signature dialog box appears listing the signatures you have created.
4. Select the signature you want to either edit or remove from the list.
5. Click **Edit...** or **Remove...**, as appropriate.
 - **Edit** – displays the Edit Signature dialog box allowing you make changes.
 - **Remove** – warns you about removing the signature. Click **Yes** to remove.
6. Click **OK** to close the Create Signature dialog box. If you removed a signature, you might want to double-check the *Signature for new messages* and the *Signature for replies and forwards* fields to be sure it uses the signature of your choice.
7. Click **OK** to close the Options dialog box.

Sharing Files in a Message


You can share files such as spreadsheets, database files, or word processing files by sending them to a user as message file attachments. You can include a file with your message in two ways: attach a file to a message or insert the contents (text only) in a message. If you need to send an attachment to a group of people, it is recommended that you use the Public Folders or share it another way than email.

Attaching files to a message

1. Create a message to send.
2. Click **Insert File** .
3. Locate and select the file to be attached. Click **Insert**.
4. An icon with the filename you selected appears in the message at the point of the cursor.
5. Finish the message and click **Send** when ready.

Inserting text files in a message

When you are trying to insert text, Outlook attempts to insert the text from any file it recognizes. Other formats than a straight text file or simple HTML file do not insert properly. If you want to insert a document as a text file, first save it as a .txt or .htm file.

1. Create a message to send.
2. Click **Insert File** .
3. Locate and select the file to be inserted.
4. Click the down arrow next to the *Insert* button.
5. From the drop-down menu, select **Insert as Text**. The text is inserted in the message at the point of the cursor.
6. Finish the message and click **Send** when ready.

Viewing an attachment

To open an attachment you can:

- Double-click the attachment icon from an open message window or from within the preview pane.

Note: An attachment in a message that uses HTML or plain text as the message format appears in a line below the *Subject* field. An attachment in a Rich Text message or in other types of items is included in the body of the message.

- Right-click the message that contains the attachment. From the submenu, point on to **View Attachments**; then click the name of the attachment that you want to view.

Saving an attachment

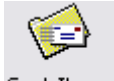
You may want to save attachments to your hard drive, a diskette, or maybe a local file server.

1. Open the message with the attachment that you want to save.
2. Right-click the attachment icon.
3. From the submenu, select **Save As...** The Save Attachment dialog box appears.

4. If necessary, change the location of where to change the attachment by using the drop-down menu next to the *Save in:* field.
5. In the *File name:* field, you can rename the attachment if necessary, as well as change the file format in the *Save as type:* field.
6. Click **Save**.
7. Close the message.

Sent Items folder

This folder displays the messages you have already sent.



1. Click the **Sent Items** folder Sent Items to see the messages you have already sent.
2. To view a message in the Sent Items folder, double-click it.

Outbox folder

Messages that cannot be sent because you want to delay delivery of a message, or are working offline, are saved in the Outbox. Messages that you have marked with a delay delivery, or you “sent” while offline, will automatically be sent when the date and time occur or when you log back onto the network.

Drafts folder

If you are in the middle of composing a message and get interrupted, or if you want to postpone completing a message until a later time, you can save a message to finish it later.

Note: By default, unsent messages you are working on are saved every three (3) minutes.

With the Message window active, click the **File** menu and select **Save**. You won’t notice anything happening but the message is saved to the Draft Items folder. You can continue working on the message or close the Message window.

You can go back to the message at any time to add information, send it, or delete it. Simply open the Drafts folder and double-click the message you want to edit, send, or delete.

Deleted Items folder

The Deleted Items folder stores all deleted items from the Inbox, Calendar, Contacts, Tasks, Notes, Outbox, Sent Items, and other mailbox folders you have created. You can delete items you no longer need from any folder. Deleting items is a two-step process: moving the items to the Deleted Items folder and emptying the Deleted Items folder.

Items are permanently deleted when:


- You empty the Deleted Items folder.
- You manually delete them individually from within the Deleted Items folder.

After either of these steps has been taken, the item(s) cannot be restored.

Moving items to the Deleted Items folder

1. Open the folder containing the item(s) that you want to delete.
2. Select the item(s) to be deleted.

Tip: To select more than one item hold down the [CTRL] key as you click the next item.

3. Click **Delete**  or press the [Delete] key. When you delete an item from a folder, the item is moved to the Deleted Items folder.

Alternatively: You can delete an item by dragging it to the Deleted Items folder.

At this point the item is only marked for deletion. If you close and reopen Outlook, you will see that these items have not yet been deleted and are still in the Deleted Items folder. This provides the added feature of being able to restore an item that you decided you want.

Undeleting items

You can undelete items from the Deleted Items folder before it is emptied.

1. Open the Deleted Items folder.
2. Right-click the item you want to undelete.
3. From the submenu, select **Move To Folder**.
4. Select the folder into which to move the deleted file.
5. Click **OK**. The item is moved out of the Deleted Items folder and placed in the folder you selected.

Alternatively: You can also retrieve a deleted item by dragging it from the Deleted Items folder to another folder.

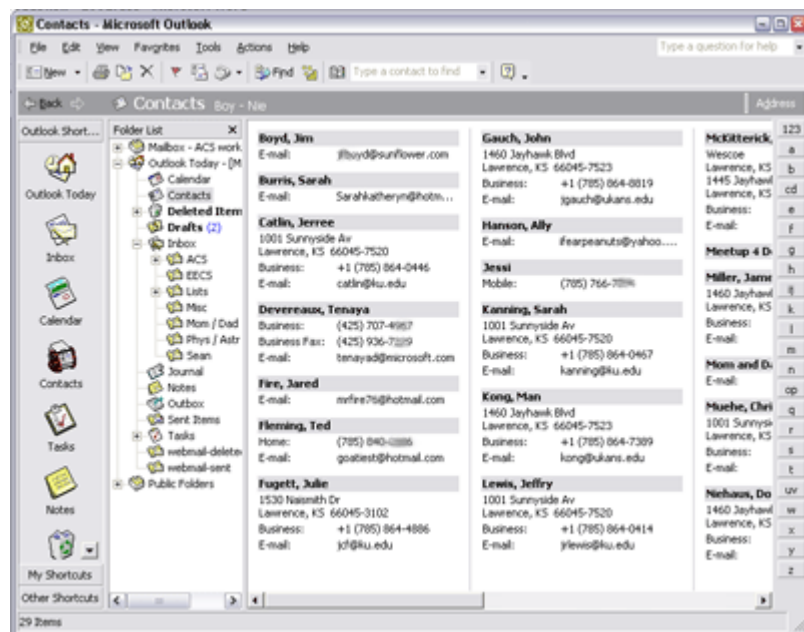
Emptying the Deleted Items folder

1. To permanently delete all the items from the Deleted Items folder, right-click the Deleted Items icon on the Outlook Shortcuts Bar.
2. From the submenu, select **Empty “Deleted Items”** folder.
3. A message appears asking you to confirm deletion of all the items in the Deleted items folder. Click **Yes** if you want to permanently delete all items. Click **No** to cancel the process.

Alternatively: You can also permanently delete all the items from the Deleted Items folder by click the **Tools** menu and selecting **Empty “Deleted Items” Folder**.

Contacts folder

The Contacts folder is your e-mail address book and information storage for the people and businesses you communicate with. The Contacts folder is used to store e-mail addresses, street addresses, phone numbers, and any additional information that relates to the contact, such as birthday or anniversary date.

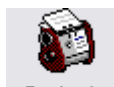


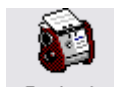
The Contacts Information Viewer

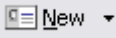
When you enter a name or address for a contact, Outlook separates the name or address into parts and puts each part in a separate field. You can sort, group, or filter contacts by any part of the name or any part of the address you want. You can file contact information alphabetically under last name, first name, company name, or any word that helps you find the contact quickly. Outlook gives you several naming choices to file the contact under, or you can enter your own choice.

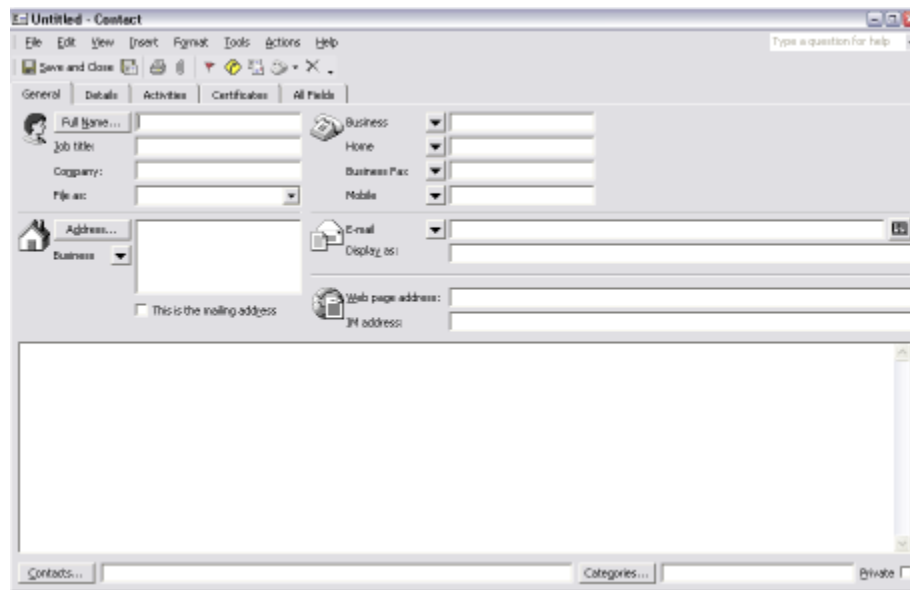
Creating a New Contact

Information about each contact is saved as a Contact item. Each Contact item can contain different fields of information. Although Outlook can save as much or as little information about your contacts as you want, it is usually only necessary to complete a few of the fields for each contact.




1. Click the **Contacts** shortcut icon  on the Outlook Shortcuts Bar to display the Contacts Information viewer.

2. Click **New** . A new Untitled-Contact form appears.



A new contact form

3. The *General* tab is where you type most of the information about the contact. All fields, except Full Name or Company, are optional.
4. Type in the name of the contact in the *Full Name...* field. You can either type the name in the field as “*firstname lastname*” or “*lastname, firstname*” (without the quotes) or click **Full Name...**  and type the name in the five specific fields.
5. If appropriate, type the person’s job title in the *Job title:* field.
6. In the *Company:* field, type the name of the company the person is associated with.
7. When you tabbed, the *File as:* field is automatically filled in with the name entered in the *Full Name...* field. This field is responsible for alphabetizing the contact name in the Contacts Information viewer. Contact information can be filed by last name, first name, nickname, or any word that helps you find the contact quickly. Outlook gives you several naming choices to file the contact under, or you can enter your own choice.
8. In the next four fields, *Business*, *Home*, *Business Fax* and *Mobile* fields, you can type in phone numbers for the contact.
9. By default, Outlook expects you to type a Business address. Type the complete address in the large text field at the right of the *Address...* field.
10. In the blank box next to the *E-mail* field, type in an email address if desired.
11. In the *Web page address:* field, type in the contact’s Web page address.

Note: It is not necessary to type `http://`, Outlook automatically adds it when you tab to the next field.

12. The large, blank area at the bottom of the form is for miscellaneous notes about the contact.
13. Each contact can be associated with other contacts. Click **Contacts...** to display the Select Contacts dialog box and select one or more contacts.
14. Click **Categories...** to display the Categories dialog box and assign one or more categories to a Contact.
15. If you intend to share the contents of your Contacts folder with other people, but you do not want them to view the information regarding this contact, click the **Private** field.
16. When you have entered all the information you need regarding this contact, click **Save and Close**.

The default view for Contacts is Address Cards, which shows you each contact as an individual card with one mailing address, one business telephone number, one home telephone number, one email address, and one Web page address. Change the view in Contacts by clicking the **View** menu, pointing on to **Current View**, and then selecting one of the views from the menu.

Creating a Contact from an email message you receive

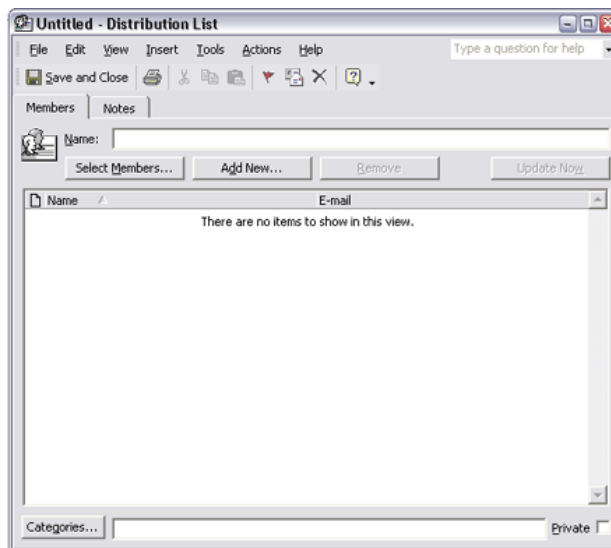
You can quickly add a person to your Contact list from an email message. It does not matter whether the name is in the *To:*, *From:*, or *CC:*, field.

1. Open the email message.
2. In the *From:*, *To:*, or *Cc:* field, right-click any name you want to make into a contact.
3. From the submenu, select **Add to Contacts**. A new Contact form appears.
4. The *Full Name...*, *File as:*, and *E-mail* fields are automatically filled in with information about that person. You may add any additional information you wish or leave it alone with just this information.
5. Click **Save and Close**.
6. Repeat steps 2-5 as needed to add additional contacts on this email message.
7. Close the email message.
8. Open the Contacts folder to view the person you just added.

Creating a Personal Distribution List

If you send email regularly to the same group of people, you can create a personal distribution list for that group. Future emails can then be addressed to the personal distribution list and will be sent to all members.

1. Open the Contacts folder, if it isn't already.
2. Click the **Actions** menu and select **New Distribution List**. An Untitled – Distribution List form appears.



A new distribution list

3. Type a name for the distribution list in the *Name:* field.
4. To add names to the distribution list, do one or both of the following:
 - To add names from either the Global Address List or your Contacts folder, click **Select Members...**. The Select Members dialog box appears. By default, the Global Address List is displayed in the *Show Names from the:* field. You can select a contact from this list or change the field to show your Contacts and select names from there. Select a contact you want in the distribution list and click **Members->**. The name should be listed under the *Add to distribution list:* section. When you have selected all the names you want in the distribution list, click **OK**.

Tip: If you want to select everyone in your department, click **Find...**. In the *Department:* field, type the name of your department. When the search is done, select all entries and click **Members->** to move the names over to the Add to distribution list: field. Click **OK**.

- To add names and email addresses of people who are not currently in your Contacts folder or on the Global Address List, click **Add New...**. In the *Display Name:* field, type the contact's name. In the *E-mail* address field, type the contact's email address. If you check the *Add to contacts* field, that person will be added to your Contacts folder as a separate contact, as well as the personal distribution list. Click **OK**.
5. Repeat step 4 as many times as needed to add all the contacts you want to the distribution list.
 6. Click the **Notes** tab to add notes to yourself about this distribution list.
 7. When you have all the people added to the distribution list that you want, click **Save and Close**.

The name of the personal distribution list is now in your Contacts folder. It is identified by an icon of a pair of heads near the right end of a card's title.

Editing a Personal Distribution List

1. Open the Contacts folder, if it isn't already.
2. Double-click the personal distribution list's name.
3. You can:
 - Add more people to the personal distribution list by clicking either **Select Members...** or **Add New...**
 - Remove people from the personal distribution list by selecting the name you want to remove and clicking **Remove**.
 - Update the personal distribution list. If the Global Address List has been updated or you have made changes to items in your Contacts folder since you created the list, click **Update Now** to update the personal distribution list (i.e., if someone's email address changes).
4. Click **Save and Close** to save the changes.

Creating an Exchange Distribution List

Exchange Distribution Lists are a convenient way to include groups of people when using messaging, calendaring, and Public Folder features of Outlook. A Distribution List which is hosted on the Exchange server differs from a "Personal Distribution List" which you might create in your own Contacts folder in a couple of important ways.

- The list can be accessible to others through the Global Address Book.
- The membership of the list will be updated automatically on a nightly basis.
- The list can be easily used to assign permissions to a Public Folder.

Each Exchange Distribution List is highly configurable and can be maintenance-free for Exchange users. A list can be made of the faculty and staff employed in a certain department or of all the students enrolled in a certain class. As information changes in Human Resources and Student Records, the lists are automatically updated nightly so they will always match the most current data.

The options available for list creation are too numerous to list here. If you'd like to read more about what lists can do and what kind of lists you can request for your department, class, or University organization, please see the Exchange Distribution List Overview document online at <http://www.ku.edu/exchange/dlists/dlistsoverview.shtml>.

To request an Exchange Distribution List, go to <http://www.ku.edu/exchange/dlists>.

Quitting Outlook

To shut down Outlook, click the **File** menu and select **Exit** or click the close button.

Note: If you open either an existing item or a new item and then close Outlook without closing the item, the open item remains displayed on the desktop. You can close the item displayed on the desktop by clicking the close button.

Changing your password

Password changes must be made online. You can change your Exchange password through the *KU Online Services Password Management* (<http://www.ku.edu/computing/password>) page if you also want to change dial-in, People, etc. You are no longer able to change your password through Outlook or Outlook Web Access (OWA).

For More Information

Here are some additional sources of information about Outlook and Exchange:

KU's Exchange & Outlook Support – 864-0200

Exchange Email Help – exchange@ku.edu

Email your questions, problems or concerns to the Exchange team.

Website FAQs – www.ku.edu/exchange/faqs.shtml

Questions and information related to KU's Exchange project and using the Outlook client can be located at this Web site.

Other Help Options -

Like other Microsoft Office applications, Outlook has a Help menu and an Office Assistant that can be used to get online help. Selecting Help from the Help menu allows you to use the Office Assistant or the Outlook Help file to find the information you need. You can also use the What's This feature to find out about a part of the Outlook window or what a button or box does. All of the following features can be located under the Help menu on the toolbar.

Using the Office Assistant -- When you first start Outlook, the Office Assistant appears on your screen. You can choose any of the items listed in the Office Assistant balloon. You can also type a question and click Search. The Office Assistant provides a list of relevant topics. If you select a topic, the Office Assistant opens a window that provides detailed information about that topic. The Office Assistant can be hidden or closed.

Using the on-line help -- The Help window has two panes. The left pane allows you to select topics and the right pane shows information about the select topics. There are three tabs: Contents, Answer Wizard, and Index. The Contents tab allows you to select general areas of information, the Answer Wizard tab allows you to ask a question in your own words, and the Index tab provides an alphabetical list of major help topics.

What's This? -- When you select this option from the Help menu, a question mark is added to the pointer. Using this question mark pointer, you can point onto any menu item and click to get information about that item, or point onto any region of an Information viewer or form and click to get information about that region.

Office on the Web -- Outlook opens Internet Explorer and opens a Web site with information about Office 2000 applications.

Detect and Repair -- Activates a utility that examines your Office installation and automatically corrects errors.

Getting Additional Help

Academic Computing Services provides consulting and Q&A help in a variety of ways:

785/864-0200

question@ku.edu

www.ku.edu/acs/help

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