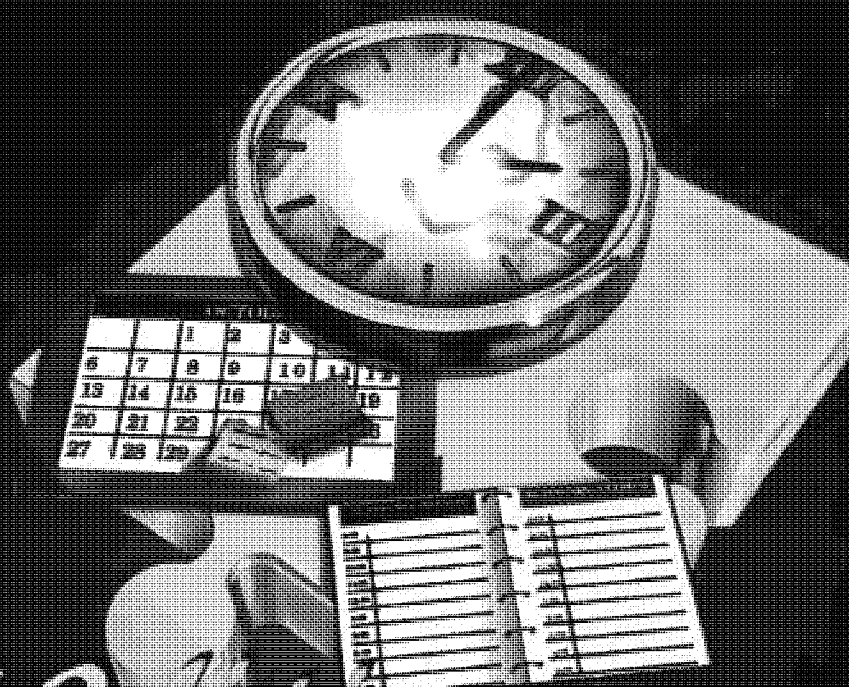# EXHIBIT 70

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USING MICROSOFT® OUTLOOK™ 97

Gordon Padwick

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Special Edition

Using
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Outlook 97

Written by Gordon Padwick with

Helen Feddema • *Pamela Palmer* • *Sharon Podlin* • *Rob Tidrow*

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Composed in *Century Old Style* and *Franklin Gothic* by Que Corporation.

To Mary Stower, my godmother, who lives in Newton Poppleford, Devon, England.

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This is my opportunity, as the lead author of this book, to acknowledge and thank the many people who have contributed to it.

My thanks go to three groups of people: the dedicated folks at Microsoft who conceived and created Outlook, the writers who contributed chapters to this book, and the enthusiastic crew at Que who made this book possible.

Above all, I should offer my thanks to the Microsoft people who created Outlook but, unfortunately, I don't know their names. To you all, I offer my congratulations for creating a great new product.

During the last few months of 1996, I learned about Outlook by using an unending (so it seemed) series of beta versions of Office 97. My special thanks go to the team of Microsoft people who promptly answered my many questions, particularly to Scott English, Dayle Maynard, and John McCrae. You did a great job, guys, in answering most of my questions, and in avoiding giving specific answers to some of my questions about Outlook's limitations. Bill should be proud of you.

Although my name appears on the cover, I didn't write it all. Thank you to the writers who contributed chapters to this book: Sharon Podlin, Pamela Palmer, Rob Tidrow, and Helen Feddema. Without their expertise and experience, the book wouldn't have been possible.

My thanks also go to many people at Que who've made this book possible: Don Essig—Acquisitions Editor—directed the entire process of getting this book written, Kevin Kloss—Developmental Editor—kept the subject matter in focus, Rebecca Mounts—Production Editor—repeatedly prodded me to clarify my writing, Curtis Knight, Convergent Data Technologies, Inc., Stan Spink, and Robert Bogue—Technical Editors—vetted the technical details and suggested more corrections than I was sometimes pleased to receive.

The many illustrations of what you can expect to see on your screen were captured with Collage Complete. Thank you to Nancy and Neil Rosenberg of Inner Media for providing Collage Complete for me to use to capture screens for this book.

As always, I want to acknowledge my gratitude to my wife, Kathy, who uncomplainingly puts up with seeing the back of my head during the many evening and weekend hours I spend writing books. Her support and encouragement have made it possible for me to finish this book just about on schedule.

Gordon Padwick

January, 1997

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P A R T

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Getting Started with Outlook

CHAPTER **1**

Outlook Overview

by Gordon Padwick

Outlook is a comprehensive desktop information management system that you can use to organize information, manage your time, and communicate with other people. Outlook offers you a home base to use as the center point for your computing activities. You can use Outlook to organize the information you have on your desktop (or laptop) computer, to work with information in Office and Office-compatible applications, and to share information.

As a focus application in Office 97, Outlook works seamlessly with the other major Office 97 applications: Access, Excel, PowerPoint, and Word. It also works with other applications, not only from Microsoft, that are compatible with Office 97. ▪

■ Getting to know Outlook

Gain an overall understanding of Outlook and decide whether it's what you need.

■ Using Outlook

Understand how Outlook can help you manage your time, organize your information, and communicate with other people.

■ Developing a custom Outlook environment

If Outlook isn't exactly what you need, you can use it to develop your own customized desktop information system.

Putting Outlook into Perspective

The purpose of this chapter is to give you an overall understanding of what Outlook can do for you. Read this chapter to decide whether Outlook has the capabilities you need. You'll probably come to the conclusion that Outlook contains many features that could help you work more efficiently. However, if you live only in your word processor or spreadsheet, you might decide that Outlook isn't for you.

This chapter takes a first look at Outlook, first from outer space—the astronaut's view. Then it swoops down to take a closer look—the bird's-eye view. The remaining chapters get down to earth to work with the details.

Looking at Outlook from a Distance

Outlook lets you:

- Organize appointments, meetings, and events on your personal calendar
- Record your daily activities
- Keep your personal to-do list and track tasks you've assigned to other people
- Maintain information about your business and personal contacts
- Send and receive information by e-mail and fax
- Schedule meetings with other people
- Systematically file information from a variety of sources
- Easily find and view information you've filed
- Work from your desktop or mobile computer
- Have a worldwide perspective of information available on your personal computer, within your workgroup, LAN or WAN, and accessible on the World Wide Web

In short, Outlook provides the facilities you need to get organized and work efficiently.

Looking at Outlook from a distance, you see a nucleus that you can think of as the Outlook Engine, surrounded by four satellites, as shown in Figure 1.1.

Mail services are the communication systems you use to send messages to, and receive messages from, other people. Address lists contain information about the people with whom you communicate. Folders are the containers you use to store items of information. Profiles determine Outlook's configuration.

The essence of Outlook is the way it integrates the types of information you have to deal with. Let's consider a couple of examples.

FIG. 1.1
Outlook works with
mail services,
address books,
folders, and user
profiles.
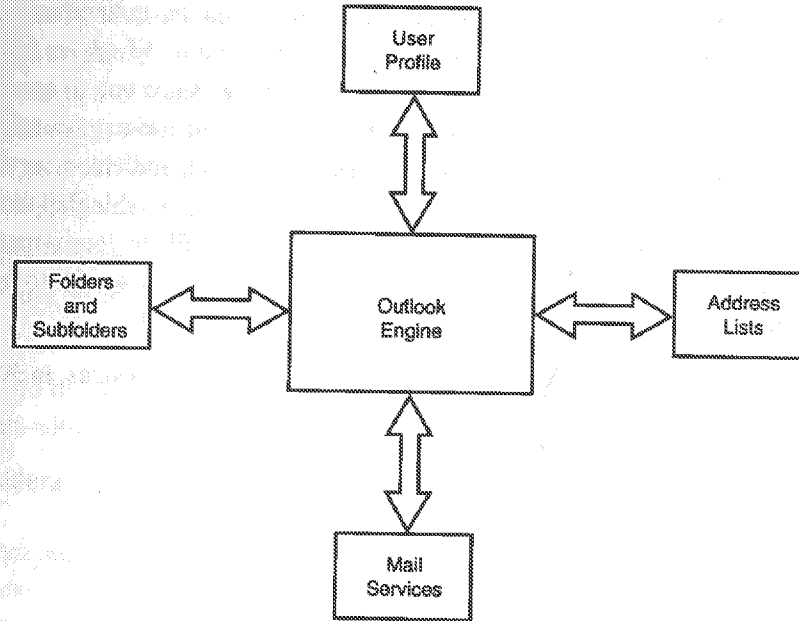
Suppose you want to send a message to a group of people. Some members of this group are in your local wq-kgroup, others are accessible by your LAN, yet others require a fax, and even others are accessible by CompuServe mail or cc:Mail. Assuming you have the appropriate address information in your address lists, you only have to send the message once—Outlook sends your message in the appropriate format to the various addresses.

Perhaps the message you send is to request information about a specific topic. Without Outlook, you would receive e-mail responses that would end up in various places in your computer's file structure, and you would receive fax responses on paper. It's a major problem to organize this information in a way you can readily deal with it. With Outlook, you get all the information, faxes included, into your Inbox. Then you can easily move all the information into subject-oriented folders.

The downside is that it will take you a while to get acclimated to Outlook's way of dealing with information. The upside, though, is your life thereafter will be much simpler and efficient, and you'll know where your information is and be able to find it quickly.

That's enough about the astronaut's viewpoint. Now, take a closer look.

Taking a Closer Look

As you've seen, Outlook deals with mail services, address books, folders, and profiles. Let's look more closely at each of these.

Mail Services Mail services are the facilities you use to send messages to, and receive messages from, other people. These services, commonly referred to as e-mail, most often consist of text. However, Outlook's e-mail facilities allow you to send and receive much more than plain text. You can format the text in your messages with all the facilities of Word. E-mail messages can include graphics, sound, and video, as well as files containing any type of data. For example, if you use a desktop publishing application to create a newsletter or other publication, you can attach that file to your e-mail. Of course, when the e-mail you send contains more than text, the person you send it to must have computer hardware and software that can interpret what you send.

Outlook contains the ability to work with several mail services, including:

- cc:Mail
- CompuServe Mail
- Internet Mail
- Microsoft Exchange Server
- Microsoft Fax
- Microsoft Mail

N O T E By the time you read this book, additional mail services may be available, or soon become available, either from Microsoft or other vendors. Look for the ability to use America Online (AOL) and Lotus Notes as mail services.

In order to send and receive e-mail, you must, of course, have access to one or more mail services either directly or by way of a dial-up or dedicated telephone connection. You'll find detailed information about information services throughout this book.

N O T E You can also use Outlook to address envelopes for mail you send by old-fashioned snail mail.

Address Lists Outlook can use several sources of address information for your personal and business contacts. The primary source of this information is a folder known as Contacts, from which Outlook automatically creates the Outlook Address Book. Here, you can list a large amount of information about each person, including several street addresses, several e-mail addresses, and many telephone and fax numbers.

You can also create a Personal Address Book as a supplementary source of address information and to create distribution lists.

If your computer is connected to other computers in a workgroup, or to a larger community by way of a LAN, you may have access to shared address books. For example, your

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workgroup administrator may have created a postoffice that lists addresses for all the members of the group. From Outlook, you can access the postoffice to identify members of the workgroup so you can send e-mail to them. Similarly, if you have access to a LAN on which Exchange Server is installed, you may have access to a Global Address List that identifies everyone on the LAN. If your LAN uses cc:Mail, you may have access to the cc:Mail address list.

You can use the information in your address lists to address e-mail, make a telephone call, or send a fax, just by choosing the appropriate address or number in one of the address lists.

You'll be pleased to know that Outlook can import existing information from various sources into its address lists.

Items and Folders   Outlook stores items of information in folders on your hard disk.

N O T E   Outlook extends the meaning of the word "folder" beyond what most of us understand. A folder is a container of information. At the top level, a folder is what we previously called a file; it is identified by a name you can see when you list the contents of a disk. Outlook's folders contain subfolders, each of which contains items of information that Outlook works with. Although each of these subfolders has a name, you don't see these Outlook subfolder names when you use Windows Explorer to list the contents of your disk; you can only see Outlook's subfolders from within Outlook. ▨

When you start using Outlook, you have direct access to several types of information items. Outlook stores these items in separate subfolders all within a folder named Personal Folders. These subfolders are:

- *Inbox*. A container for incoming e-mail and fax messages
- *Calendar*. For planning your schedule, including appointments, events, and meetings (one-time and recurring)
- *Contacts*. For keeping information about your business and personal contacts
- *Tasks*. Your personal to-do list and a way to keep track of tasks you've assigned to others
- *Journal*. An ongoing diary of your personal activities, many of which Outlook records automatically
- *Notes*. For creating miscellaneous notes
- *Deleted Items*. A container for items you delete from other folders
- *Sent Items*. A container for items you've sent by e-mail or fax
- *Outbox*. A container for e-mail and fax messages you've created but haven't sent

- *My Computer*. Provides access to the complete file structure on your computer and other computers to which you have access
- *My Documents*. Provides quick access to documents you have recently worked with
- *Favorites*. Provides direct access to Web sites in the Internet Explorer Favorites list

The folder structure Outlook provides is only the beginning. You can create your own folders and create subfolders (several levels if necessary) within each folder. You might, for example, create a folder for items related to your personal affairs and another for items related to business. Within your personal affairs folder, you might create subfolders for such subjects as vacation planning, school activities, career development, and many other subjects.

Profiles   A profile defines how Outlook works—specifically the information services Outlook uses and how it uses each of those services. You must have at least one profile, but you can have more. Profiles are defined in the Windows Registry, so you won't find files on your hard disk corresponding to profiles.

Each profile must contain the Personal Folders information service. If you are a member of a workgroup, your profile probably contains the following information services:

- *Microsoft Mail*. To allow you to send and receive e-mail within your workgroup
- *Outlook Address Book*. To provide access to Outlook's contact list
- *Personal Address Book*. Where you keep information about personal contacts and distribution lists
- *Personal Folders*. Where Outlook stores information items

You might have several other information services in your profile. For example, if you use Outlook to send and receive faxes, you will have the Microsoft Fax information service; if you send and receive e-mail by way of the Internet, you must have the Internet Mail information service.

There are several reasons why you might need two or more profiles. Suppose you sometimes use a laptop computer at your office, where it's connected to a workgroup, and at other times while you're traveling and aren't connected to a workgroup. In this case, you need one profile that contains the Microsoft Mail information service so you can connect to the workgroup when you're in the office. However, you also need a second profile that doesn't contain the Microsoft Mail information service so that Outlook doesn't get hung up looking for a workgroup connection that isn't there. When you're away from the office, you can connect to the workgroup by way of a dedicated or dial-up connection, but you still need a separate profile in which the connection is specified.

Another scenario in which more than one profile is needed is when several people use the same computer. Because profiles usually contain passwords, each person needs a separate profile.

There's usually a default profile that Outlook creates automatically when you install it. Outlook may be configured to ask which profile to use at startup.

Using Outlook

The three major uses of Outlook are managing your time, organizing your information, and communicating with other people. To give you a broad understanding of how Outlook works, we'll take a quick look at each of these and also at how Outlook archives information. Subsequent chapters in this book describe these uses in much greater detail.

Managing Your Time

Outlook's Calendar allows you to plan your time in whatever detail you require. You can also integrate your schedule with other members of your workgroup.

When you first open Calendar, you see a window that has three principal parts, as shown in Figure 1.2. The Date Navigator at the top right displays calendars for the current and next month with today's date highlighted. The left section of the window shows an hour-by-hour breakdown of the current day. The bottom-right section is the TaskPad that shows your active tasks.

In addition to the day view shown here, you can also choose a week or month view. With any view displayed, you can easily move to other days, weeks, months, and years.

You can define activities that will, or might, occupy your time. These include appointments, meetings, and events, each of which can be one-time or recurring. Once you have defined these activities, they are marked on your Calendar.

In addition to your personal activities, you can use the Calendar to arrange activities that involve other members of your workgroup. For example, if you want to arrange a meeting with some of your colleagues, you can use Outlook to find a time when all the people are free, a suitable meeting room is open, and any equipment you need (such as a projection system) is available.

Although tasks in your to-do list are not really part of your Calendar, you can see your current tasks in any Calendar view. Unlike the activities you mark on your calendar, tasks do not have to be done on a specific day or at a certain time. You can, if you want, provide a due date and a start date for a task.

FIG. 1.2
The day view of the Calendar shows your activities for the current day.
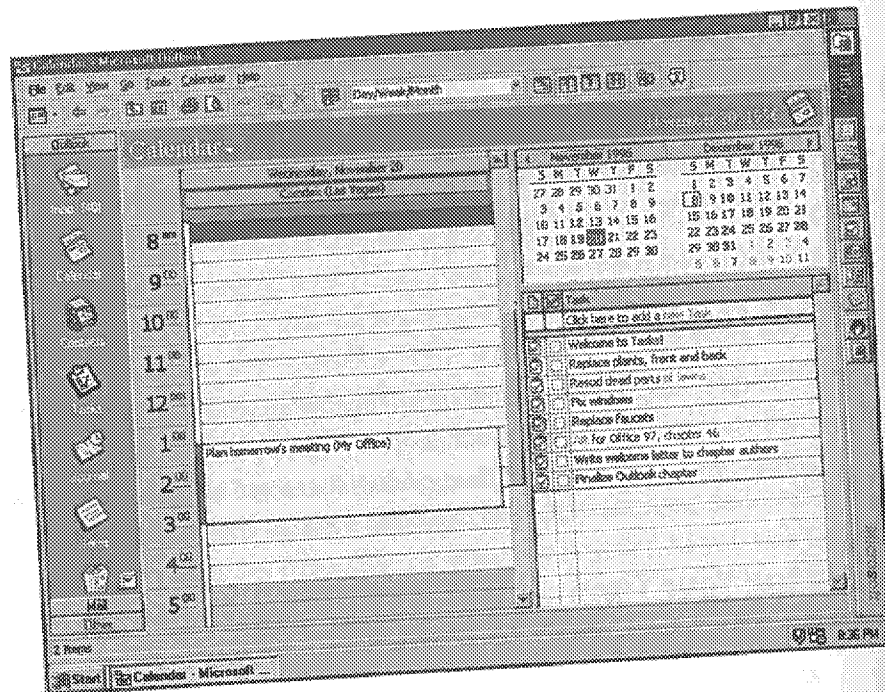
In addition to tasks you list for yourself, in a workgroup environment you can assign tasks to other people and keep track of those assignments.

You can set up a reminder for the activities you mark in your calendar or place on your to-do list. You can set a visible or audible reminder to occur at a certain time prior to the start of the activity or prior to a task's due date.

Organizing Your Information

In days gone by, many people lacked access to the information they needed to do their jobs. Today, people have access to more information than they know what to do with, but they have a problem finding the information they need. Although Outlook doesn't solve this problem completely, it certainly helps by letting you store information from many sources in a structured system of folders and subfolders.

If the information you have arrives in some way into your computer, you can easily save it within Outlook's folders and subfolders. This type of information includes e-mail you send and receive, faxes you send and receive (using your computer as a fax machine), files you download from the Internet and other information services, records of telephone calls you make, and work you do with Office and Office-compatible applications.

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Outlook lets you record any other information and activities in its folders, but you have to do this manually. You can make notes about a conversation, or something you've done, and save those notes as an item.

Categorizing Information   One of the key concepts in Outlook is categories you can use to organize all your information items. Outlook comes with an initial set of categories you can tailor to suit your personal needs. After doing so, you can assign one or more categories to each item of information. Having done that, you can easily look for items that match any combination of categories. An example might help to clarify this.

Suppose politics is one of your interests. In this case, your list of categories might include such words as: politics, Republican, Democrat, liberal, moderate, conservative, environment, budget, education, commerce, transportation, president, Congress, Senate, federal, state, local, and any number of other keywords that are appropriate. When you receive or create an item of information relating to politics, you assign one or more of these keywords to that item. Thereafter, you can easily ask Outlook to show you information items that match any combination of your categories. This all depends, of course, on your meticulous attention to assigning categories to items.

Organizing Information   You can easily keep information organized by moving items from one folder to another. To give a brief idea of how this works, suppose you've created a personal affairs folder and, within it, a vacation planning subfolder. You can use Outlook to send a fax to a hotel requesting information. As soon as the fax is sent, Outlook places it in the Sent Items folder. To keep things organized, you move the fax from the Sent Items folder to your vacation planning subfolder. A couple of days later you receive a reply that appears in Outlook's Inbox folder. After you've read the reply, you move it to the vacation planning subfolder. Following this pattern with all your vacation planning items, you can keep them all together for easy reference.

If you get really enthusiastic about your vacation planning project, you might accumulate many, perhaps hundreds of, items in your subfolder. It's then that you start using Outlook's tools that allow you to sort and group the items in many ways, and to filter them so that only those that satisfy certain conditions appear on your screen.

Outlook's Journal facility can be a great help in any planning project. Outlook can automatically record many different types of activities. For example, it can (if you want) record every e-mail and fax message you send and receive. It can also record each time you work with one of the Office applications, or any other application that's compatible with Office. If you use Word to write letters, Outlook's Journal contains records of when you wrote those letters—if you wrote a letter, you presumably mailed it. If you want to make a

specific Journal entry to record the fact that you actually sent the letter, you can do so manually. Outlook can't, of course, record when you receive letters. However, you can use the Journal to manually record receiving a letter.

You can use the telephone numbers in your Contacts list to make telephone calls. When you do so, the Journal automatically records the time you place the call. In addition, if you want, the Journal can record the duration of each call.

Communicating with Other People

You can use Outlook to send and receive e-mail and fax messages using several different information services. As explained earlier in this chapter, the services you have available depend on what is included in your profile and, of course, which services are available to you.

You can configure Outlook to look for e-mail messages in various services periodically, or you can manually instruct Outlook to look for messages. If messages are waiting for you, Outlook receives them and lists them in your Inbox. When faxes arrive, Outlook also places them in your Inbox.

You can create messages and send them to one or more recipients, who may use various information services. After you create a message, you can send it immediately, or you can place it in your Outbox to be sent later. You can reply to messages you receive and forward messages to other people.

Archiving Items

People who use Outlook regularly can rapidly accumulate a large number of items in their folders. Since disk space is not infinite, you need to remove items on a regular basis. Outlook provides several methods for doing this.

You can archive items manually or automatically. In either case, Outlook creates a file that contains a folder structure identical to that of the parent folder structure, copies items to the archive folders, and then deletes those items from the parent folders. You can subsequently move the archive file to whatever storage medium you normally use.

Automatic archiving depends on the aging period set for your working folders. Outlook automatically sets a default aging period, but you can change it to whatever you want. You use manual archiving by choosing commands. In this case, you have the choice of either copying items to archive folders, or deleting them.

You can also export specific items to files in various formats.

Developing a Custom Outlook Environment

Like other Office applications, Outlook has a dual personality. You can use it "out of the box" as a versatile desktop information system, or you can use it to develop your own customized information system.

The first two parts of this book provide a thorough coverage of what you can do with Outlook without any customizing. The third part of this book gives an introduction to customizing.

Many of the dialog boxes you see while you are working with Outlook are forms you use to provide certain information. For example, you use the Message dialog box to create an e-mail message and the Contact dialog box to enter information about a contact.

You are not limited to the forms in the "out of the box" Outlook. If these forms don't provide all you need, you can create forms tailored to your specific needs. The forms you create may contain boxes for types of information (fields) that Outlook items normally have, but are not displayed on the standard forms, or may contain boxes for types of information (custom fields) that you create.

With Access, Excel, PowerPoint, and Word, you can use Visual Basic for Applications (VBA) as a programming language to enhance the built-in capabilities of those applications and to control their interaction with other Office applications. With Outlook, you can use Visual Basic Script (a subset of Visual Basic for Applications) for the same purposes.

By creating your own forms and using Visual Basic Script, you can use Outlook as a basis for creating your own customized desktop information manager.

From Here...

This completes a brief overview of Outlook's facilities. Now it's time to start looking at these facilities in detail. The following chapters deal individually with these facilities.

- Chapters 1 through 11 introduce you to the basics of using Outlook.
- Chapters 12 through 26 show you many of Outlook's broader capabilities.
- Chapters 27 through 29 provide an introduction to customizing Outlook.

CHAPTER

5

Creating and Using Contacts

by Gordon Padwick

Contacts are those people and organizations with whom you interact in your personal and professional lives. Outlook maintains information about these contacts in your Contacts subfolder, which is within your Personal Folders folder. Each item in your Contacts subfolder can contain such information as a contact's name, address, telephone numbers, e-mail addresses, employer, and more. After you've entered this information, Outlook can use it to address e-mail, place telephone calls, send faxes, address conventional mail, and for many other purposes.

Using Contacts

Use Outlook's Contacts to store comprehensive information about your business and personal contacts.

Creating individual contact records

Save name, job title and employer's name, home and business addresses, telephone numbers, e-mail addresses, and much more about each contact.

Using various views of your contact information

Display and print your contact records completely or selectively in various formats.

Using your contact information to place phone calls

Place phone calls and keep records of those calls automatically.

Addressing conventional mail

Use your contact information to write individual and form letters.

Printing contact information

Use Outlook to make printed copies of your contact information in various standard formats.

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N O T E   Outlook also can access address books for individual e-mail services. These include
address books in your workgroup's postoffice, global address lists available on your
LAN, and your CompuServe Address Book.

Besides the information you keep about contacts in your Contacts subfolder, you also can
keep a Personal Address Book, which is particularly useful if you want to create distribu-
tion lists. Chapter 13 contains information about Personal Address Books.

In this chapter, you'll learn how to create and use items in your Contacts subfolder.

Creating Contacts Items

The first time you run Outlook, two items are automatically placed in your Contacts
subfolder: a dummy address called "Welcome to Contacts" and your own name—the
name you supplied when you installed Office 97. To see these items, click the Contacts
shortcut in the Outlook Bar to display the Contacts Information Viewer with the Address
Cards view selected, as shown in Figure 5.1.

FIG. 5.1

The Contacts
Information Viewer
initially contains two
items: Welcome to
Contacts and your
own name.
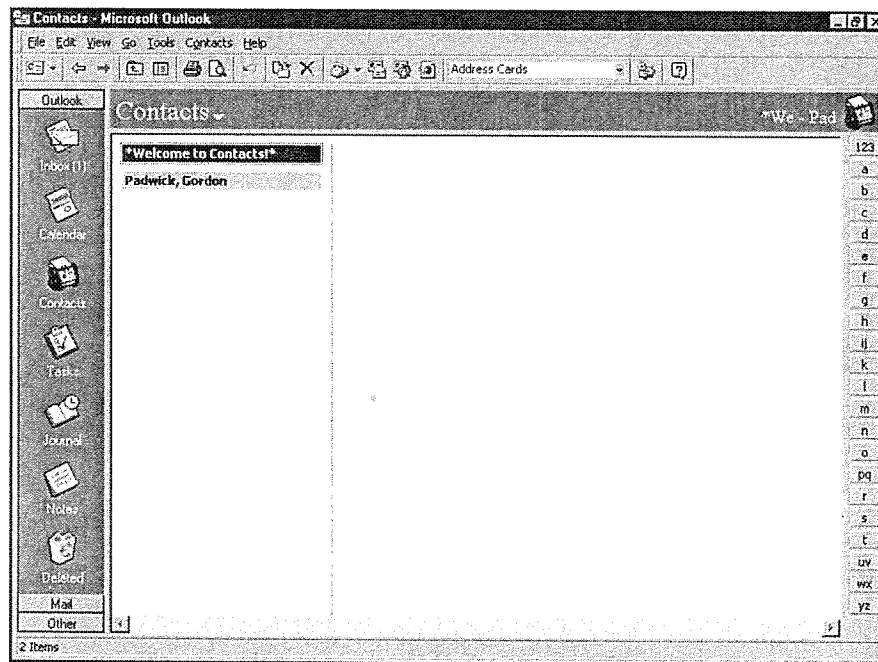
N O T E   If the Information Viewer you see on your screen is in a different format from that
shown in the figure, open the Current View list in the toolbar, and choose Address
Cards.

The menu bar and toolbar in this Information Viewer are almost identical to those you've seen in the Inbox, Calendar, and Tasks Information Viewers. The status bar at the bottom of the window shows the number of Contact items in your Contacts subfolder.

Creating Basic Information About a New Contact

To create a new contact item, make sure the Contacts Information Viewer is displayed and then click New Contact in the toolbar (alternatively choose Contacts, New Contact, or press Ctrl+N) to open the Contact dialog box shown in Figure 5.2.

FIG. 5.2
Use the Contact dialog box to enter information about a new contact.
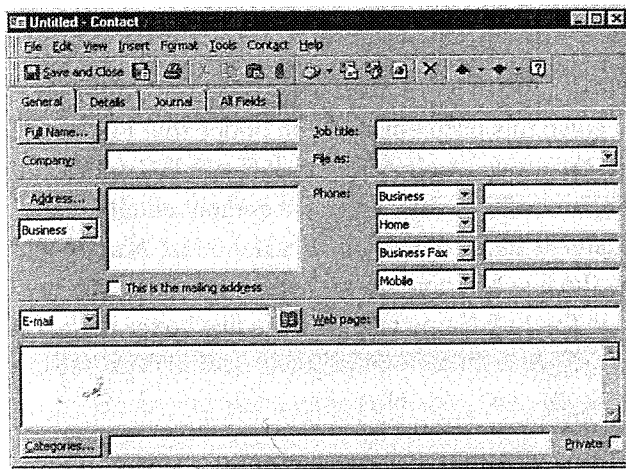
N O T E   This chapter describes how you can enter information about each of your contacts, one at a time, from your keyboard. You also can import contact information that already exists in other files. Refer to Chapter 25 for detailed information about this subject.

The Contact dialog box consists of four tabs. You'll use the General tab, shown in Figure 5.2, to enter basic information about the contact. The four sections of this tab are used for:

- The contact's name, job title, company affiliation, and the name by which the item is indexed.
- The contact's addresses and phone numbers.
- The contact's e-mail addresses and Web page address.
- Miscellaneous notes, the categories you assign to the contact, and a Private notation (if required).

Entering a Contact's Name   You start providing information about a new contact in the top section of the General tab. The first information you provide is the new contact's Full Name; you can provide this information in either of two ways. The simplest way is to type

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the name in the Full Name text box. Type a name such as **John Q. Smith**, and then press Tab to move the insertion point to the Job Title text box. Notice that Outlook reproduces the name you typed as **Smith, John Q.** in the File As text box (that's the name Outlook will subsequently use to index your contacts' names).

The File As text box is mentioned in more detail later in this chapter in the section "Viewing Contact Items." For now, you can see that Outlook understands that the name you typed consists of a first name, a middle initial, and a last name—it has to do so in order to reconstruct the name the way it did in the File As text box.

What happens, though, if your contact's name is Prof. Emeritus John Q. Smith, Ph.D.? If you type that name, you'll find that Outlook puts Smith, Emeritus John Q. in the File As text box. Outlook is smart, but not always smart enough!

Here's how you solve this problem. Did you notice that Full Name isn't only the name of a text box, it's also the name of a button? Click the Full Name button to display the Check Full Name dialog box, which shows the five components (Title, First, Middle, Last, and Suffix) Outlook allows for a contact's name. If the Full Name text box is empty when you click the button, the five components shown in the dialog box are empty. If you've already entered a name in the Full Name text box, the five boxes in the dialog box show how Outlook has *parsed* (separated into components) the name you typed. Figure 5.3 shows the dialog box with the five possible components of a name.

FIG. 5.3
The Check Full Name dialog box displays the five components Outlook allows for a contact name.
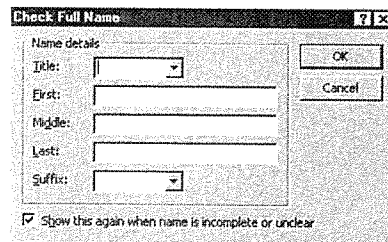
To enter a Title for your contact, you can open the Title list box and choose from those titles listed, or you can type whatever title is appropriate. Simply type names in the First, Middle, and Last text boxes. Choose or type a Suffix.

N O T E The check box at the bottom of the dialog box seems to imply that Outlook is smart
enough to decide when it isn't sure how to parse a contact name you type. Although I've left this box checked, I've never seen Outlook open this dialog box automatically. Perhaps this capability will emerge in a future version of Outlook.

After you've entered as much information as you need, click OK to return to the Contact dialog box.

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Notice that File As is a list box. Open the list box to see one or more ways in which Outlook proposes to index your contact. For now, choose any of them—you'll have more to choose from soon.

Entering a Contact's Job Title and Company   Providing a contact's Job Title is straightforward. Just type the job title and press Tab to move the insertion point to the Company text box.

You should pay more attention to the contact's Company (or organization) name, because you can subsequently enter more contacts at the same company. Type a company name that applies to all the contacts you might subsequently add, not a company name that applies only to an individual contact. For example, it's usually not a good idea to include department names as part of the company information. Supply department names later as part of the address information.

After you've entered a Job Title and a Company name, press Tab to move again to the File As box. Now open the File As list box to see a list of File As names from which you can choose, as shown in Figure 5.4. Choose the name by which you want Outlook to list your contact.

FIG. 5.4
After you provide a contact name, job title, and company, Outlook offers various File As names.
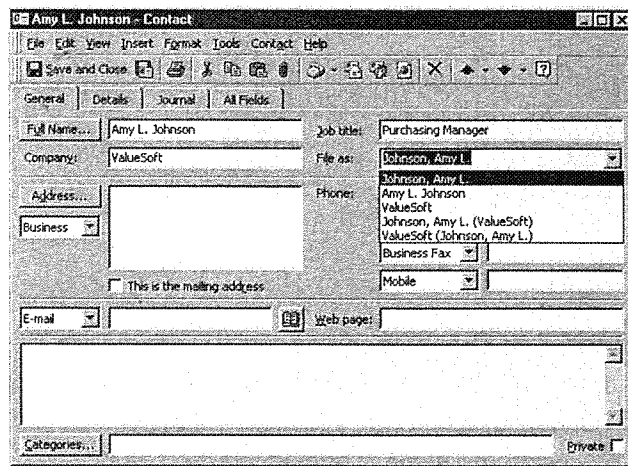
N O T E   You don't have to choose one of the File As names Outlook offers. You can type anything you like (a nickname, perhaps) as the File As name.

Entering Addresses   After completing the top section of the dialog box, move to the next section where you enter addresses and phone numbers.

Outlook lets you enter three separate addresses for each contact: a business address, a home address, and an "other" address. You don't have to provide all three.

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By default, the Contact dialog box proposes that you provide a business address, as indicated by the word "Business" at the left side of the second section of the dialog box. If you want to provide a different address, open the list box under the Address button, and choose either Home or Other.

If you want to provide a business address, make sure that Business is selected. You can use the large text box at the right of the Address button to type an address. As in the case of providing a contact name, you can choose between typing an address in the conventional way and trusting Outlook to parse the address properly, or you can enter the various components of the address into separate text boxes.

When you enter an address in the Address text box, Outlook assumes that the address consists of a street address, city name, state (or province) name, ZIP (or postal) code, and country name. For home addresses, this works fine most of the time. However, for nonstandard addresses, Outlook tends to get confused. Instead of relying on Outlook to parse the address properly, it's usually better to click Address to display the Check Address dialog box, shown in Figure 5.5, and enter the individual lines of the address there.

FIG. 5.5

Use the Check Address dialog box to enter the contact's address.

After you've entered the address, click OK to return to the Contact dialog box.

The Check Address dialog box contains five text boxes: Street, City, State/Province, ZIP/Postal Code, and Country. You can enter as many lines of information as you need in the Street text box. When you're entering a business address, you can use this box for information such as a department name, a building name, a mail stop number, and any other identifying information, as well as the street address. In the case of a home address, you can use this box for a house name, as well as the street address.

The City, State/Province, and ZIP/Postal Code text boxes each can contain only one line of information.

N O T E Be consistent about how you name states. If you're going to use the items in your Contacts subfolder to create mailing labels, you should probably adopt the standard state and province abbreviations.

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If you're not consistent—sometimes using the full state name, sometimes the conventional journalist's abbreviation (such as Calif), and sometimes using the standard postal abbreviation (such as CA)—you'll subsequently run into problems when you sort contacts by state.

You either can type a one-line country name or choose a country name from a list (useful if you're not sure how to spell a country name).

When you've entered the address information, click OK in the Check Address dialog box to return to the Contact dialog box with the address displayed. After entering your contact's business address, you can choose Home and then enter a home address, and choose Other and enter another address.

You can designate any one of the three addresses as a mailing address. To do so, display the mailing address and then click the This Is the Mailing Address check box.

Entering Phone Numbers   Not so long ago, each person had two phone numbers at the most: a business number and a home number. Now, people tend to have more than two numbers. Outlook allows you to keep as many as 18 numbers for each of your contacts. These are named:

- Assistant
- Business
- Business 2
- Business Fax
- Callback
- Car
- Company
- Home
- Home 2
- Home Fax

- ISDN
- Mobile
- Other
- Other Fax
- Pager
- Primary
- Radio
- Telex
- TTY/TTD

The Contact dialog box initially contains space for only four of these numbers: Business, Home, Business Fax, and Mobile. You can enter a phone number into each of these, then open each of the list boxes to select another type of number and enter numbers for those, and so on, until you have entered as many of the 18 numbers as you need. Outlook stores all the numbers you provide, even though you can only see four at a time in the dialog box.

If you're going to take advantage of automatic dialing, you must enter phone numbers correctly. Enter phone numbers within your own country in the normal way—Outlook

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ignores spaces, hyphens, parentheses, and other similar characters, so you can use these or not. Note the following hints:

- In North America, do not place a 1 before the area code. Your modem's dialing properties should be set to provide the 1 automatically when it's needed.

- Always include the area code, even if it's your local area code which you don't normally need to dial. If your modem's dialing properties are set correctly, Outlook ignores the local area code. With the area code entered, you can use your contact information from a location outside your normal area code, such as when you're traveling or if your own area code changes.

- Enter international phone numbers in the form:

  +021(982)494–4321

  where "021" is the country code. The parentheses and the dash are optional.

- Outlook ignores any text after the phone number. You can enter a phone number such as **(805)592–6214 x349** in which the extension number is there as a reminder to you—Outlook ignores it.

Entering a Contact's E-Mail Address   The next section of the dialog box is where you enter e-mail and Web page addresses.

You can provide as many as three e-mail addresses for each contact. Simply choose E-mail, E-mail 2, or E-mail 3 from the list, and enter the e-mail address. Enter Internet addresses in the standard form such as esmith@server.com. Enter CompuServe and AOL addresses in the same way you would when sending a message by way of the Internet, such as 99999.999@compuserve.com or mailbox@aol.com.

N O T E   CompuServe addresses have a comma as a separator between the first and second groups of numbers. If you want to send e-mail to a CompuServe address by way of the Internet, you must replace the comma with a period.

You provide CompuServe addresses in this way if you intend to access CompuServe e-mail by way of the Internet. If you want to access CompuServe e-mail directly, you must add the CompuServe Mail information service to your profile. After you've done that, you can access your CompuServe Address Book to find CompuServe e-mail addresses. Refer to Chapter 22, "Sending and Receiving E-mail from Other Services," for information about this topic.

Entering a Web Address   The Contact dialog box also has provision to enter a Web page address for each contact. You enter a Web address in the standard format, such as:

  http://www.company.com

http://www.quecorp.com

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After you've entered a Web page address, you can subsequently use Outlook to open that page (providing you have a compatible browser, such as Internet Explorer, installed).

Adding Miscellaneous Notes   The bottom section of the Contact dialog box is where you can provide any miscellaneous notes about a contact, and also assign one or more categories to the contact. Although the notes box is a convenient catch-all place for information that doesn't fit elsewhere, it has one significant limitation. When you subsequently list information about your contacts, you can sort or filter the displayed information based on all the components of the contact information with the exception of what is in the notes box. For this reason, you should only use the notes box for information that doesn't belong in any other place.

N O T E   Before starting to type your notes, take a look at the Details and All Fields tabs of the Contact dialog box. These tabs might contain places for some of the information that you might think of including in notes. See "Entering Additional Contact Information" later in this chapter.

To enter notes, click inside the large rectangular box near the bottom of the dialog box to create an insertion point. Then type your notes. If you type more lines of notes than can fit into the space available, a vertical scroll bar appears at the right side of the box and you can continue typing.

Assigning a Category to a Contact   You can assign one or more categories to each contact, using any of the categories in your personal master list of categories.

> **See** "Working with Categories," **p. 68**

Click the Categories button at the bottom of the Contact dialog box to choose from a list of available categories displayed in the Categories dialog box. Check one or more categories in the list, then click OK to return to the Contact dialog box. Alternatively, Outlook allows you to enter one or more category names directly into the Categories box. This is usually not a good practice because you will probably not always be consistent in the way you name categories. Another problem with entering categories in this way is that they do not become part of your personal master list of categories.

N O T E   If you want to add, delete, or edit categories, choose the Master Category List button in the Categories dialog box.

Marking a Contact as Private   If you're working in an environment in which other people have access to your Contacts subfolder, you may want to mark some of your contacts Private, so that only you have access to them. To do so, click the Private check box to place a check mark there.

Saving Your Contact After you've supplied all the contact information, choose Save and Close to close the Contact dialog box and display the contact's information in the Address Cards view (or whatever other view you had previously selected), as shown in Figure 5.6. Outlook saves the new contact information in your Contacts subfolder. The contact information saved includes the information displayed in the General tab and any information you may have provided in the other three tabs.

FIG. 5.6

After you've saved a new contact, the Information Viewer displays some of the contact information.
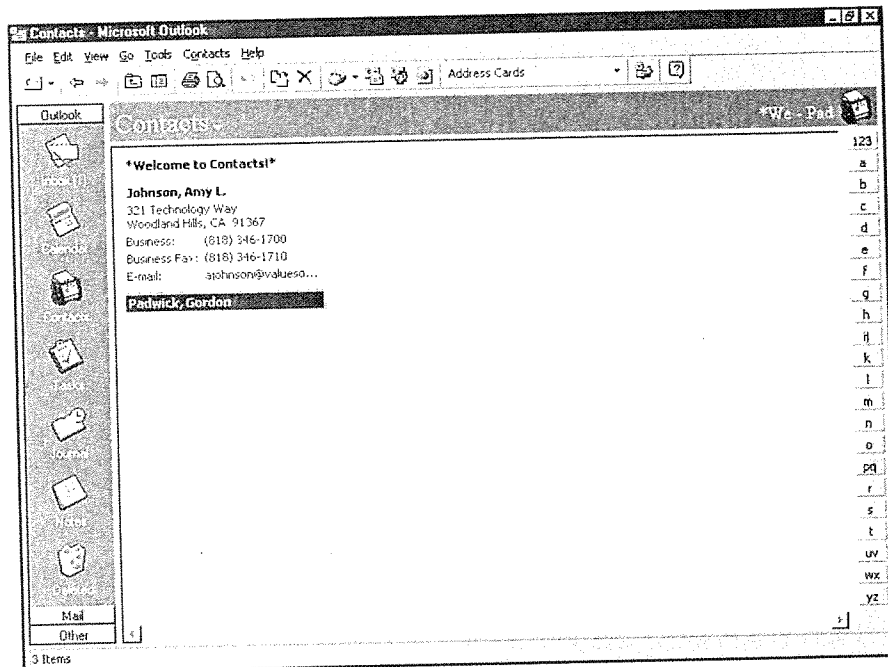
The Address Cards view shown here contains only some of the information you provide for each contact. Refer to the section "Selecting Contact Views" later in this chapter for information about selecting views that display additional information.

Editing Contact Information

You might want to make changes to the information you have provided for your contact. To do so, display the Contacts Information Viewer with the Address Cards or any other view selected. Double-click a contact to reopen the Contact dialog box with the information about the selected contact displayed.

Make whatever changes and additions you want in the dialog box, then click Save and Close to save the edited contact information.

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Entering Additional Contact Information

The procedure for supplying contact information described so far has dealt only with the Contact dialog box's General tab. You can supply additional information by opening the Details tab, as shown in Figure 5.7.

FIG. 5.7
You can provide additional information about a contact in the Contact dialog box's Details tab.
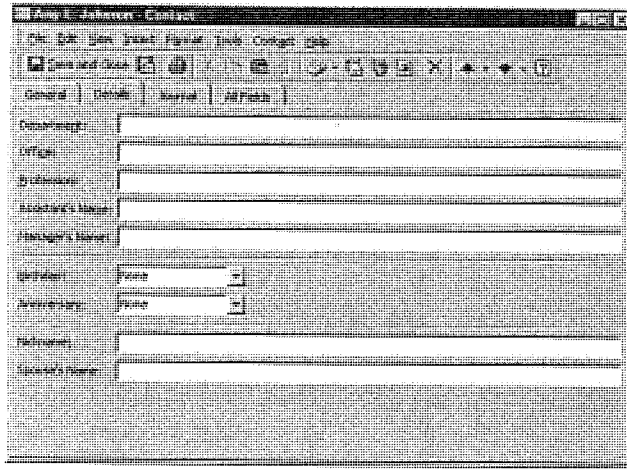
Enter information into any or all of the seven text boxes. Open the two list boxes and choose dates from the displayed calendars to enter a birthday and an anniversary.

N O T E   In Calendar, you can create birthdays and anniversaries as recurring events. Unfortunately, Outlook doesn't provide any direct linkage between these recurring events and the birthday and anniversary dates you can enter for each contact. If you want to have complete information in Calendar and Contacts, therefore, you have to enter these dates twice—not the ideal situation.

It's possible to resolve this problem by writing some Visual Basic Script. Chapter 28, "Working with Visual Basic Script," explains how you can do this.

Creating Automatic Journal Entries

In Chapter 7, you'll read about Outlook's capability to create automatic records of certain activities, including your interaction with people listed in your Contacts subfolder. Outlook stores these records in your Journal subfolder.

N O T E   See "Recording Activities Automatically" in Chapter 7 for detailed information about Outlook's Journal.

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By default, Outlook doesn't automatically record any of your interactions with your contacts. You enable automatic recording of contact activities separately for each contact. To do so, open the Journal tab shown in Figure 5.8.

FIG. 5.8
The Journal tab is where you enable journal entry recording.
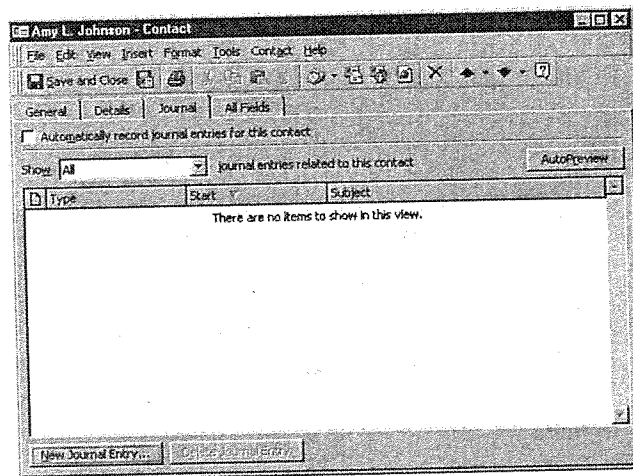
To enable recording of journal entries for the current contact, click the check box labeled Automatically Record Journal Entries for This Contact at the top of the dialog box.

The remaining part of this dialog box, which is blank at this time, is where you will see journal entries that Outlook has recorded for the current contact. Refer to Chapter 7 for more information about this.

Using Other Fields

Outlook saves each piece of information you provide about a contact in a storage location known as a field. There are separate fields for each of the five components of the Full Name (the five boxes in the Check Full Name dialog box), the Company, the Job Title, and all the other separate pieces of information you can provide in the Contact dialog box's General tab. There also are separate fields for the nine pieces of information you can provide in the Details tab.

In addition, other fields are available for you to use.

N O T E Outlook has 104 available fields that can be used for each contact item. Numerous other fields are available for use with other types of items. For detailed information about fields, refer to Appendix D.

In addition to the standard fields Outlook contains, you can create user-defined fields. Refer to Chapter 18, "Organizing Your Journal," for information on this subject.

To see these fields, open the Contact dialog box's All Fields tab, as shown in Figure 5.9.

FIG. 5.9

You can use the All Fields tab to enter information in fields that are not normally shown.
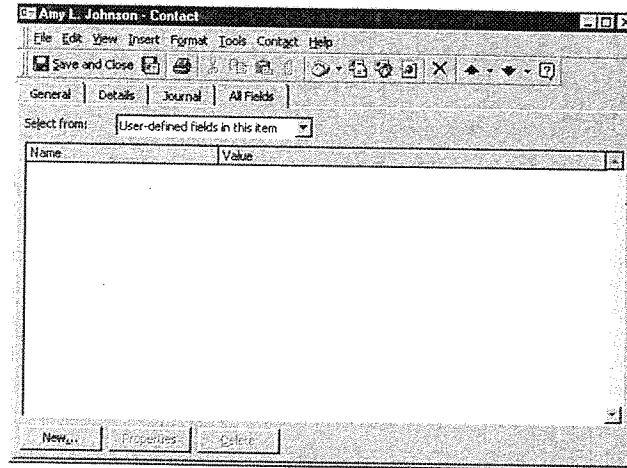
The Select From list box at the top of the dialog box lets you choose a specific group of fields. The available groups include:

- User-defined fields in this item
- Frequently used fields
- Address fields
- E-mail fields
- Fax/Other number fields
- Miscellaneous fields
- Name fields
- Personal fields
- Phone number fields
- All Contact fields

As an example of how you might want to use a field that is not normally displayed, suppose you want to note your contacts' hobbies. After doing so, you can easily use your list of contacts to find people who have specific hobbies.

You might be tempted to list hobbies in the notes box (General tab), but that's not a good idea because, if you do so, you won't be able to sort your contacts according to their hobbies. A better solution is to open the All Fields tab, and choose Personal Fields, as shown in Figure 5.10.

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FIG. 5.10

The Personal Fields group of fields includes Hobbies and several other fields that aren't normally displayed.
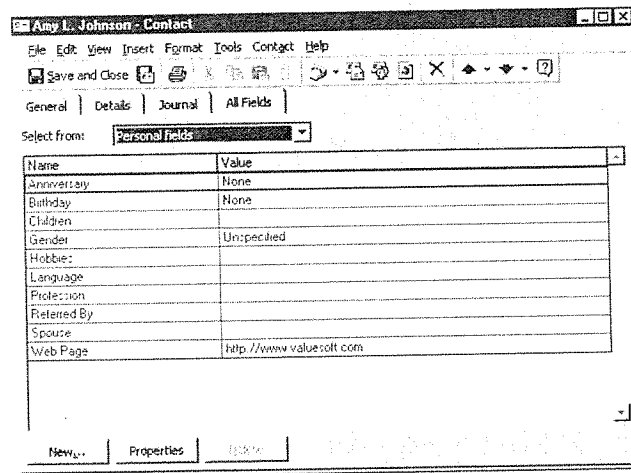
Choose the Hobbies field in the list of fields, and then type the hobbies for the current contact. Outlook saves the information you type here with all the other information about the current contact when you choose Save and Close in the toolbar.

Entering More Contacts at the Same Company

After you've saved a contact at one company, you can enter other contacts at the same company without retyping all the company-specific information. To do so, display the Contact Information Viewer and select an existing contact. Then choose Contacts, New Contact from Same Company to open the Contact dialog box with the company-specific information displayed.

Now, all you have to do is enter the new contact's name and any personal information about that contact.

Viewing Contact Items

Outlook stores the contacts you enter in your Contacts subfolder. You can display information about your contacts by using one of Outlook's standard views, or you can create your own views.

Using Standard Contact Views

Outlook contains six standard views you can select to see information about your contacts. These views are listed in Table 5.1. Outlook displays contacts in two types of views: Card (as information might be printed on an index card), and Table (as rows of information with one row for each contact).

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Table 5.1   Standard Contact Views

View	View Type	Fields Displayed
Address Cards	Card	Contact name, mailing address, business and home phone numbers.
Detailed Address Cards	Card	Contact name and job title, business and home addresses, business phone and fax numbers, home phone number, e-mail addresses, categories, notes.
Phone List	Table	Contact name, company name, file as name, business phone and fax numbers, home and mobile phone numbers, whether journaling is enabled, categories.
By Category	Table	Listed by category. Contact name, company name, file as name, categories, business phone and fax numbers, home and mobile phone numbers.
By Company	Table	Listed by company. Contact name, job title, company name, file as name, department, business phone and fax numbers, home and mobile phone numbers, categories.
By Location	Table	Listed by country. Contact name, company name, file as name, state, country, business phone and fax numbers, home and mobile phone numbers, categories.

You can see your contact information in one of these standard views by opening the Current View list in the toolbar and choosing one of the views.

Creating Custom Views

While the six standard views provide a way for you to see what is in the Contacts subfolder, they might not show that information in the way you would prefer to see it. You can modify the standard views and create your own custom views in the same way that you can with task views, as described in the "Viewing Your Tasks" section in Chapter 4. Refer to that section for information about:

- Sorting contacts in alphabetical or data order
- Formatting individual fields
- Changing the order of fields
- Adding and deleting fields

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Grouping items

Filtering items

Earlier in this chapter, you learned how to include information about contacts' hobbies in your records. None of the standard views contain the hobbies field, so you might want to create a new view, based on one of the standard views, that includes the Hobbies field. Here's how you would do that:

1. Display the Contacts Information Viewer using any available view.

2. Choose View, Define Views to display the Define Views for "Contacts" dialog box shown in Figure 5.11.

FIG. 5.11
The Define Views for "Contacts" dialog box shows the available views.
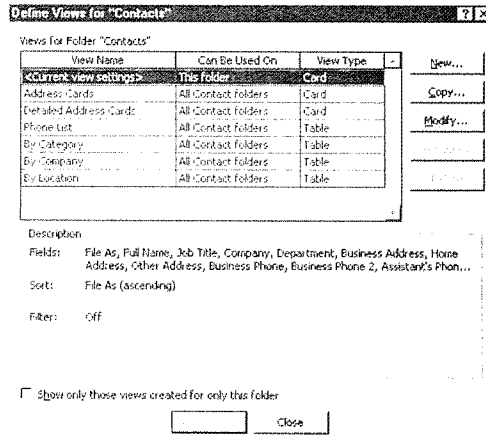
3. Choose the view you want to use as the basis for the new view, such as Detailed Address Cards.

4. Choose New to display the Create a New View dialog box shown in Figure 5.12.

FIG. 5.12
Use the Create a New View dialog box to name the new view and to define its type.

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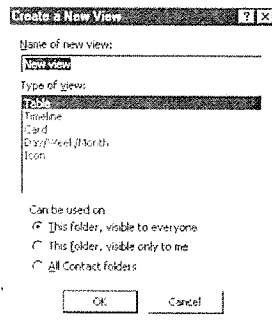
5. In the Name of New View text box, type a name, such as **Detailed Cards with Hobbies**, for the new view.

6. Select a type, Card in this case, for the new view in the Type of View list box, and click OK to display the View Settings for "Detailed Cards with Hobbies" dialog box shown in Figure 5.13.

FIG. 5.13

The View Settings for "Detailed Cards with Hobbies" dialog box lets you choose which types of changes you want to make to the existing view.
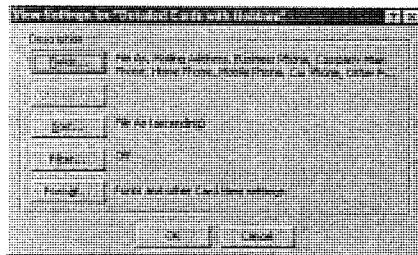
7. Choose Fields to display the Show Fields dialog box shown in Figure 5.14.

FIG. 5.14

Use the Show Fields dialog box to add and remove fields from the view.
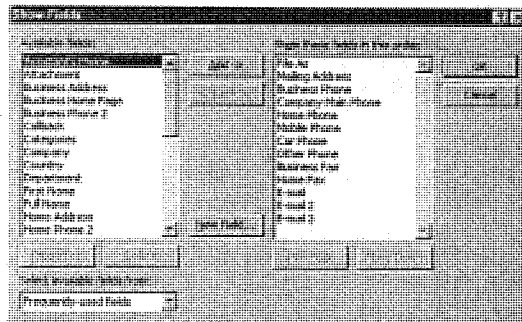
8. Open the Select Available Fields From list box at the bottom of the dialog box, and choose Personal Fields to display the available personal fields in the list of Available Fields.

9. In the Available Fields list, select Hobbies.

10. Click Add to move Hobbies into the list of fields to be included in the view, as shown in Figure 5.15. The added field is at the bottom of the list. You can, if you want to, click Move Up to move the field to a different position.

11. Click OK twice to return to the Define Views for "Contacts" dialog box.

12. Click Apply View to display the Information Viewer with the new view selected, and show the added field for those items in which you have provided content for the new field, as shown in Figure 5.16.

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FIG. 5.15
The Show These Fields in This Order list shows the fields to be included in the new view.
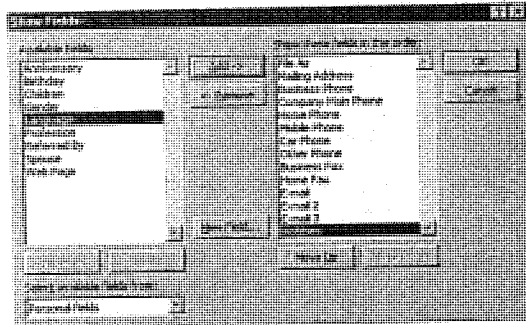
FIG. 5.16
The Information Viewer shows the new view with the added Hobbies field for those contacts for which you have entered text in that field.

Hobbies ⏐
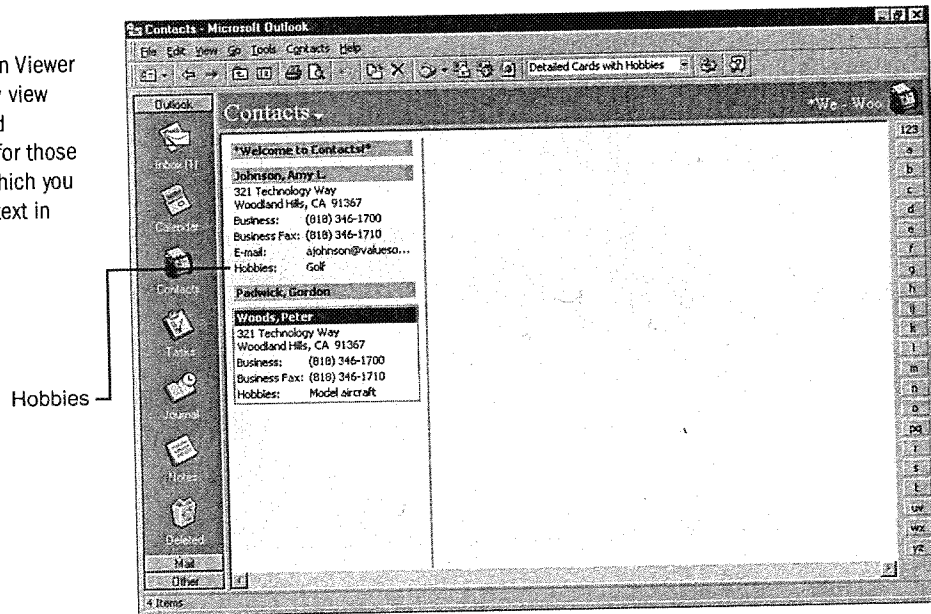
There are, of course, many other ways in which you can modify standard fields to create custom fields.

Using Your Contact Information

After you have saved information about your contacts in your Contacts subfolder, you can use that information in many ways, some of which are described in the following sections. You'll find additional information about using your contact information throughout this book.

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The Contacts menu contains four items you can select to use information in your contacts list:

- *New Message to Contact.* Use this to send a message to someone on your contacts list. Refer to Chapter 9 for information on this subject.

- *New Meeting with Contact.* Use this to set up a meeting with someone on your contacts list. Refer to Chapter 14 to learn how to do this.

- *New Task for Contact.* Use this to delegate a task to someone on your contacts list. This subject is covered in Chapter 17.

- *New Letter to Contact.* Use this to write a letter to someone on your contacts list, as described later in this chapter.

To use the information in your Contacts subfolder as a source of addresses, you must designate your Contacts subfolder as an Outlook Address Book.

Designating Your Contacts Subfolder as an Outlook Address Book

Follow these steps to designate your Contacts subfolder as an Outlook Address Book:

1. With any Information Viewer displayed, click the Folder List button in the toolbar to open the folder list.

2. Right-click Contacts to open the shortcut menu and choose Properties to open the Properties dialog box. Choose the Outlook Address Book tab shown in Figure 5.17.

3. Click the Show This Folder as an E-Mail Address Book check box to place a check mark in it, then click OK.

FIG. 5.17
Use the Outlook
Address Book tab
in the Contacts
Properties dialog box
to designate the
Contacts subfolder as
an Outlook Address
Book.

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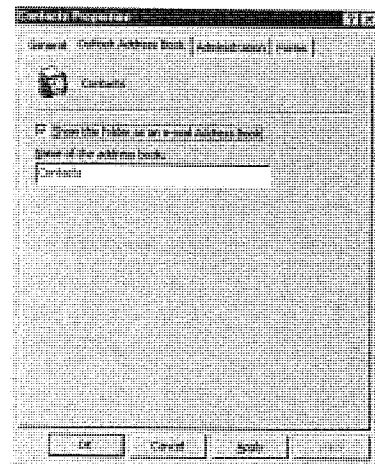
Dialing Phone Numbers

If you are running Outlook under Windows 95 or Windows NT 4.0, you can use any of your contacts' telephone numbers to place telephone calls—you cannot do this if you're running Outlook under previous versions of Windows NT, such as Windows NT 3.51. If you want, Outlook can automatically record the duration of your phone call.

Automatic dialing uses the modem installed in, or connected to, your computer. You must, therefore, make sure your modem is properly set up before trying to use automatic dialing.

Setting Up Your Modem   If you bought or inherited a computer with a modem already installed, it's likely that the modem is already set up correctly. However, before you try automatic dialing for the first time you should follow these steps:

1. Choose Tools, Dial, New Call (or press Ctrl+Shift+D) to open the New Call dialog box, as shown in Figure 5.18.

FIG. 5.18
The New Call dialog box is your control center for placing telephone calls.
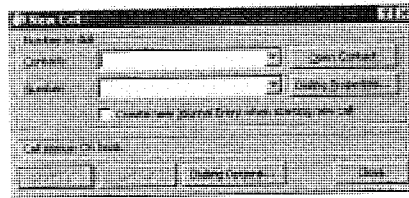
2. Choose Dialing Options at the bottom of the dialog box to open the Dialing Options dialog box shown in Figure 5.19. Make sure you choose Dialing Options, not Dialing Properties.

FIG. 5.19
The Dialing Options dialog box is primarily used to set up speed dialing. At this time, you'll use it to identify your modem.

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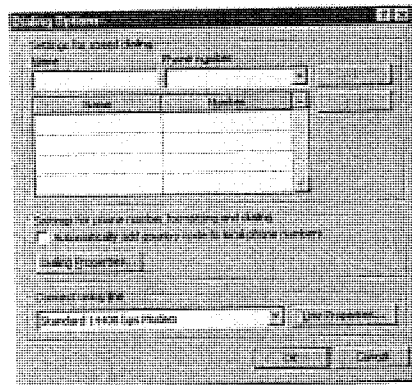
3. Open the Connect Using Line list and choose the name of the modem installed in, or connected to, your computer.

4. Click OK to return to the New Call dialog box, and then click Close to close that dialog box.

N O T E   If, in step 3, you don't see the name of your modem, the modem hasn't been installed correctly. Consult the installation instructions that came with the modem for information about correctly installing it.

Placing a Phone Call   You can use any of your contacts' phone numbers to place a call. As you'll see later, there are some optional facilities you can use. Follow these steps to place a call without using any of the options:

1. Click the Contacts shortcut in the Outlook Bar to open the Contacts Information Viewer. You can use any view of your contacts, but the Address Cards view is usually the most convenient.

2. Select the contact you want to call, and then choose Tools, Dial to display a shortcut menu that lists the available numbers for the selected contact. Alternatively, after selecting the contact, you can click the arrow at the right end of the Autodialer button on the toolbar to display the shortcut menu.

3. Click the number you want to call. The New Call dialog box opens with the contact's name and the phone number you selected displayed, as shown in Figure 5.20. The Call Status line shows that your telephone is On Hook, meaning that you haven't picked up the phone.

4. Click Start Call to place the call. The Call Status line changes to Dialing as your modem dials the call. A message on your screen tells you to lift the receiver and click talk.

5. Lift up your phone and click Talk to proceed with the call as you normally would. If you want to disconnect the call, click Hang Up and replace the phone receiver.

6. When you've finished the call, click End Call and hang up the phone.

N O T E   You can place phone calls without looking up numbers in Contacts. To do so, click the Autodialer button (or press Ctrl+Shift+D) to open the New Call dialog box without any phone number selected. Type the number you want to call in the Number text box, and choose Start Call. You can also select a contact and one of that contact's phone numbers in the New Call dialog box.

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FIG. 5.20
The New Call dialog
box opens with the
selected contact's
name and phone
number displayed.
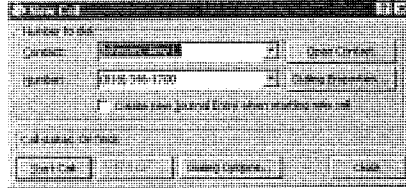
In Chapter 7, you'll learn how you can use Outlook's Journal to record various activities, including phone calls you make. If you want to record a phone call in your journal, before you click Start Call, place a check mark in the Create New Journal Entry When Starting New Call check box.

Speed Dialing   Although speed dialing doesn't use information in your Contacts subfolder, it's something you should know about.

To create a list of phone numbers you call frequently, follow these steps:

1. Choose Tools, Dial, New Call to display the New Call dialog box.
2. Choose Dialing Options (not Dialing Properties) to display the Dialing Options dialog box previously shown in Figure 5.19.
3. Type the name of a contact in the Name text box, and the contact's phone number in the Phone Number text box.
4. Click Add to add the name and number to your list of frequently called numbers.
5. Repeat steps 3 and 4 to add more numbers to your list.
6. Click OK to close the dialog box.

To call a phone number on your list of frequently called numbers, follow these steps:

1. Choose Tools, Dial, Speed Dial to display a short menu that lists your speed dialing numbers.
2. Click the number you want to call to open the New Call dialog box with the selected number displayed.
3. Click Start Call to place the call.

Redialing a Call   You easily can redial a number you have recently called. To do so:

1. Choose Tools, Dial, Redial to display a list of numbers you have recently dialed.
2. Click the number you want to redial to display the New Call dialog box.
3. Click Start Call to place the call.

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Using Contact Information in Word Documents

This book primarily focuses on the ways you can use Outlook to organize your information and communicate electronically with other people. Don't forget, though, that Outlook is a source of information you can use when you are working with other Office 97 and Office 97-compatible applications. Despite the convenience of e-mail, we still write letters, print them, place them in envelopes, and send them by conventional mail or a delivery service.

You can use most of the information you save in your Contacts folder in other Office 97 applications. To get started with doing this, consider writing a letter. Instead of retyping the recipient's address, it would be convenient to retrieve the address from your Contacts subfolder. Taking this a step further, if you're preparing a letter to send to many people, it would be very convenient to create a mailing list based on information in your Contacts subfolder.

This section introduces the subject of using Contacts information in other Office 97 applications, using Word documents as a specific example.

Writing a Letter   You easily can write a letter to any of the people in your list of contacts. When you follow the steps outlined here, Outlook automatically opens Word and uses the Word Letter Wizard to help you write the letter. Follow these steps:

1. Select a contact in the Contacts Information Viewer.
2. Choose Contacts, New Letter to Contact. Word opens automatically in a window with the first Letter Wizard dialog box displayed, as shown in Figure 5.21.

FIG. 5.21
Use the first Letter Wizard dialog box to select the overall format of your letter, as well as to choose whether you want a dateline and a header and footer.

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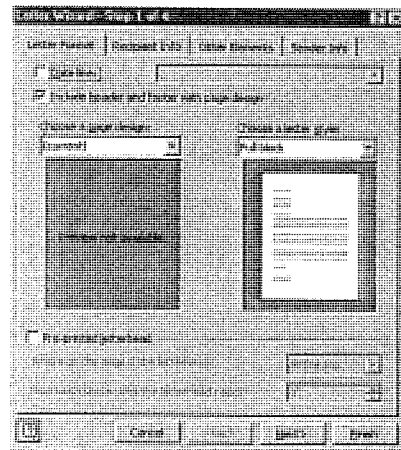
3. After you've selected the format you want, click Next to open the wizard's second dialog box. The dialog box opens with the name and address of the contact you previously selected displayed, as shown in Figure 5.22. If you want to select a different recipient, click the Click Here to Use Address Book button to open one of the Outlook address books and choose a different recipient.

FIG. 5.22
The second Letter
Wizard dialog box
opens with the name
and address of your
contact displayed.
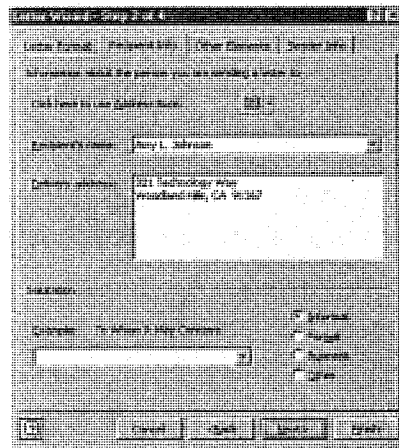
4. Choose a salutation at the bottom of the dialog box, and then click Next to open the third dialog box, shown in Figure 5.23.

FIG. 5.23
Use the third Letter
Wizard dialog box to
include various items
and to designate
people who should
receive copies of the
letter.

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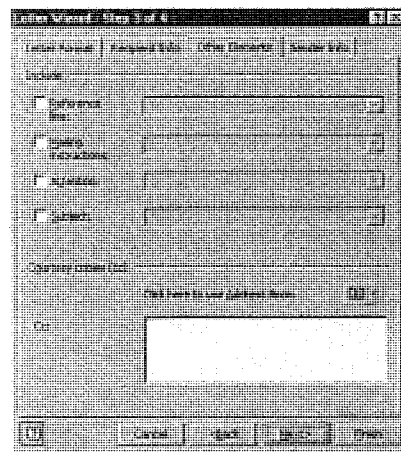
5. To add the names of people who should receive copies of the letter, click the Click Here to Use Address Book button. This opens the Select Name dialog box in which you can choose a name from any of Outlook's address books, as shown in Figure 5.24.

FIG. 5.24
The names in the selected address book are listed in the box at the left.
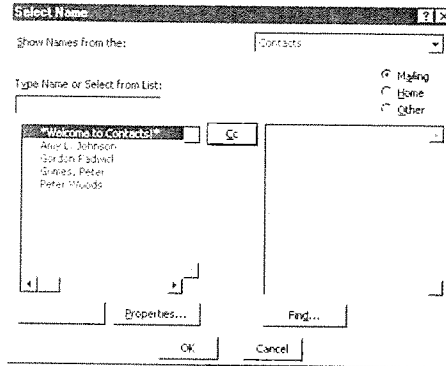
6. Choose a name, and click Cc to move that name into the box at the right. Choose as many names as you want in this way, then click OK to return to the third Letter Wizard dialog box which now shows the Cc names you selected, as shown in Figure 5.25.

FIG. 5.25
After you've chosen Cc names, those names appear in the third Letter Wizard dialog box.

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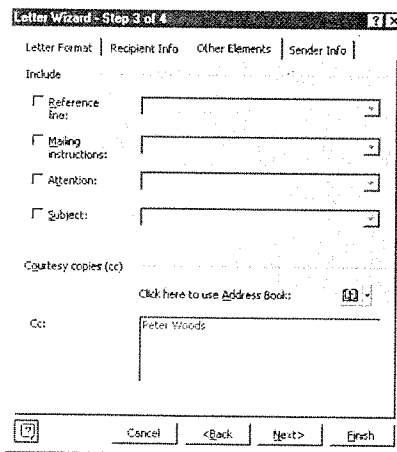
7. Click Next to open the fourth Letter Wizard dialog box shown in Figure 5.26.

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FIG. 5.26
Use this dialog box to supply the name and address of the sender.
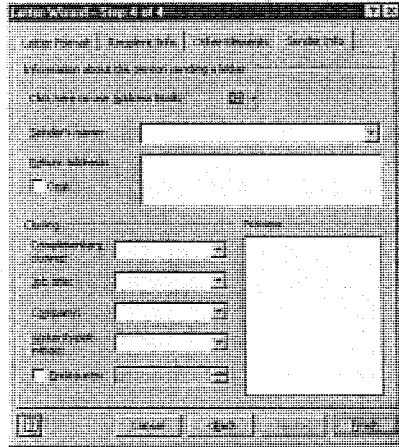
8. Click the Click Here to Use Address Book button and choose the address book that contains the sender's name (you may be typing a letter on behalf of someone else). Choose that name, and click OK to return to the Letter Wizard dialog box which now shows the sender's name and the return address.

9. At the bottom of the dialog box, select the items you want at the end of the letter, and then click Finish. Outlook takes a few moments to assemble the information, and then displays a skeleton of your letter in a Word window, as shown in Figure 5.27.

FIG. 5.27
All that remains now is for you to type the text of your letter.

9999 Exclavier Way
Canoga Park, CA 91352
United States of America

January 17, 1997
Amy L. Johnson
321 Technology Way
Woodland Hills, CA 91367
Dear Amy
Type your text here.

Gordon Padwick
cc: Peter Woods

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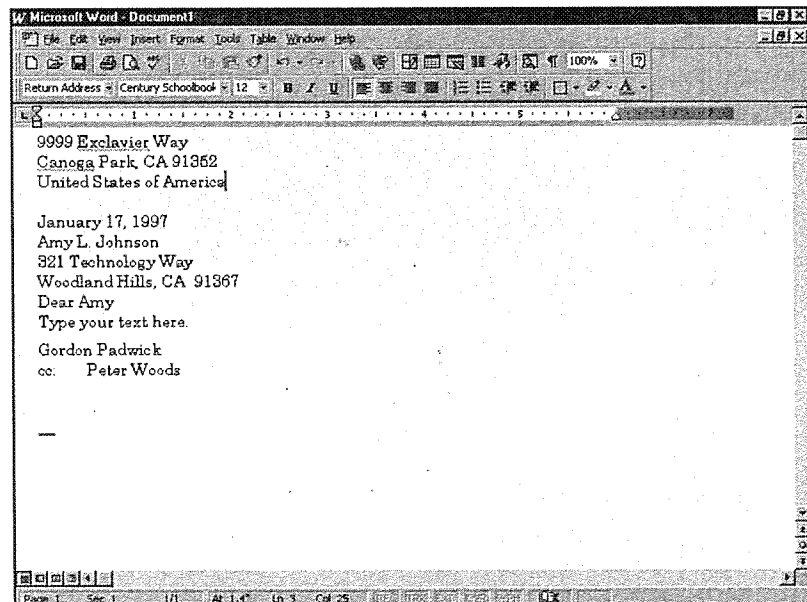
10. Use Word as you normally do to type and print your letter.

After you've typed the letter, you can prepare an envelope. With the Word window still open:

1. Choose Tools, Envelopes and Labels to open the Envelopes and Labels dialog box with the Envelopes tab selected as shown in Figure 5.28.

FIG. 5.28
Use the Envelopes tab in the Word Envelopes and Labels dialog box to create an envelope for your letter.
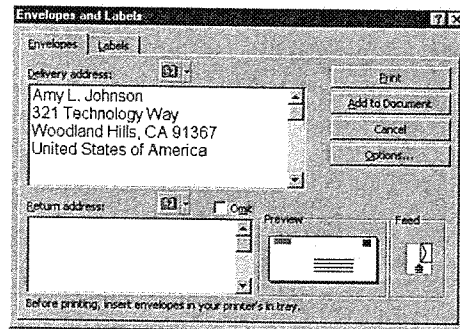
2. Click the Address Book button above the Delivery Address box, select an address book, and choose the name of the recipient.

3. Click the Address Book button above the Return Address box, select an address book, and choose the name of the sender.

4. Click Print to print the envelope.

After you've finished using Word to type and print the letter and envelope, choose File, Exit in the Word menu to close Word and return to Outlook.

Using Your Outlook Address Book as a Mail Merge Data Source   It's beyond the scope of this book to go into all the details of creating form letters to be sent to many people. If you need to do so, consult a book that covers Mail Merge in detail, such as in Chapters 16 and 17 of *Special Edition Using Word 97*, published by Que.

Using Mail Merge involves three steps:

1. Creating a data source that contains the names and addresses of the recipients, and possibly other information.

2. Creating a main document that contains the text of the letter with field codes used as placeholders for the data elements in the data source.

3. Combining the data source with the main document to create individual, personalized letters.

You can use your Outlook Contacts list as the data source. To do so, follow these steps:

1. Open a new, blank document in Word.

2. In Word, choose Tools, Mail Merge to open the Mail Merge Helper dialog box shown in Figure 5.29. Click Create, choose Form Letters, and choose Active Window.

FIG. 5.29
Use the Mail Merge Helper dialog box to step through the Mail Merge process.
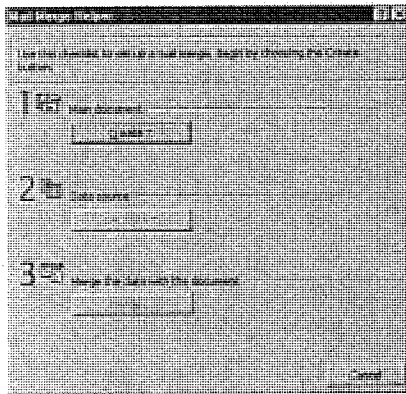
3. Click Get Data and choose Use Address Book to display the Use Address Book dialog box.

4. Choose Outlook Address Book and click OK. If Outlook isn't already open, it opens automatically (you may be asked to choose an Outlook profile) but remains hidden. A message tells you there are no merge fields in your main document. Click Edit Main Document to display the empty Word document with the Mail Merge toolbar.

5. Click Insert Merge Field in the Mail Merge toolbar to display a list of fields that can be merged. Choose the name of a merge field from the list to display that field in your main document.

6. Repeat step 5 as many times as necessary to place additional merge fields in your document. You can place any characters between the merge fields by typing those characters.

N O T E   Word uses field names that are somewhat different from the equivalent field names in Outlook.

7. After you've finished working on your main document, click Merge to New Document in the Mail Merge toolbar to create a set of letters, one corresponding to each item in your Contacts list. Each letter is separated from the next by a section break. You then can print the document to create all the separate letters.

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Many of the fields in Outlook can be used in your Word Mail Merge main document.

Creating a Temporary Contact List   The preceding procedure for creating a Mail Merge document based on your Contacts list assumes that you want to send a form letter to everyone on the list. Usually, though, you will want to send a form letter to only some people on your list. To do so, you need to create a temporary contact list that contains only selected items from your complete contact list. Here's how you can do that:

1. With any Outlook Information Viewer displayed, choose File, New, Folder (or press Ctrl+Shift+E) to display the Create New Folder dialog box shown in Figure 5.30.

FIG. 5.30
Use the Create New
Folder dialog box to
define a new folder.
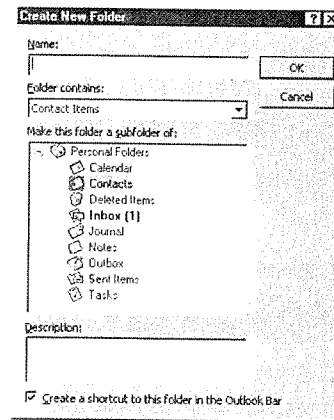
2. Enter a name, such as Mailing List, for the new folder in the Name text box.
3. Open the Folder Contains list box, and choose Contact Items.
4. Choose the folder, such as Contacts, in the Make This a Subfolder Of list under which the new folder is to be a subfolder.
5. Click OK to finish creating the new subfolder.
6. Choose Contacts in the Outlook Bar to display the Contacts Information Viewer.
7. Click the Folder List button in the toolbar to display your folders. If necessary, expand a subfolder to display the name of the new subfolder you just created.
8. Hold down Ctrl and drag items one at a time from the Contacts Information Viewer into the new subfolder.

N O T E   If you don't hold down the Ctrl key while you drag, you'll move items (instead of copying items) from your contacts list into the temporary folder.

After you've completed your temporary list, you can use this as the basis of a mail merge instead of using the entire contacts list.

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Printing Contact Information

Outlook can print any of the contact views. To print a view, select that view and choose File, Print to display the Print dialog box shown in Figure 5.31.

FIG. 5.31
The Print dialog box provides several printing options.
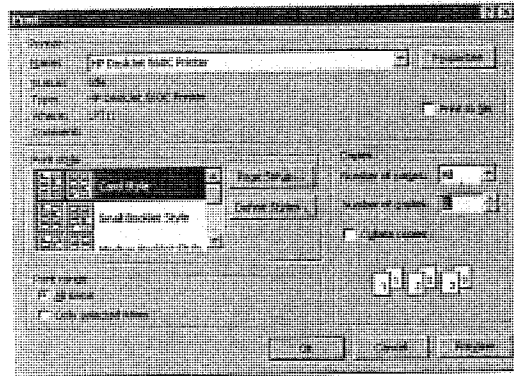
Outlook can print your contact information in the following predefined styles:

- Card
- Small Booklet
- Medium Booklet
- Memo
- Phone Directory

You can choose any style and then click Preview to see on-screen what the contact information will look like when printed.

Choose whatever options you want, and click OK to start printing.

From Here...

This chapter has covered the basics of creating a list of your business and personal contacts and has shown how you can use this information to place phone calls and write letters.

- Chapter 9, "Receiving and Sending Microsoft Mail Messages," contains information about using your contact information to send e-mail within your workgroup.
- Chapter 20, "Sending and Receiving Internet E-Mail," describes how you can use your contact information to send e-mail messages by way of the Internet.

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CHAPTER **8**

Preparing to Work with Microsoft Mail E-mail

Gordon Padwick

You can use Outlook to receive and send many types of e-mail messages and faxes. This chapter and the next deal only with receiving and sending e-mail messages within a Windows workgroup; subsequent chapters cover other types of e-mail messages, such as those you receive and send by way of the Internet.

This chapter focuses on preparing your computer environment and your Outlook installation within a workgroup. Chapter 9 describes how you actually send and receive messages. These two chapters focus on using Microsoft Mail because it's part of Windows, so everyone can experiment with it. Even if you normally use a different messaging application, the information here provides a good introduction to using Outlook for sending and receiving messages.

Connecting to a workgroup
How to setup a workgroup postoffice and establish mailboxes for the workgroup members.

Configuring Microsoft Mail
How to add the Microsoft Mail information service to your profile, and how to configure the information service.

Setting e-mail options
How to set some of the more important e-mail options.

Organizing your e-mail
Creating subfolders and categories for your mail items.

Preparing to Receive and Send Messages

Before you can receive and send messages within a Windows workgroup, you need to:

- Select an e-mail editor.
- Have your computer connected to your workgroup colleagues' computers.
- Have access to a workgroup postoffice.
- Add the Microsoft Mail information service to your profile.
- Configure the Microsoft Mail information service.
- Select appropriate e-mail options.

The following sections of this chapter deal separately with these tasks.

Choosing an E-mail Editor

You can choose the RichEdit editor built into Outlook to write and edit your e-mail messages, or you can choose Word as your message editor (provided you have Word installed on your computer). Microsoft recommends you use Word. In fact, the first time you run Outlook after installing it, you see a message asking for confirmation that you want to use Word. If you don't agree to use Word, Outlook provides RichEdit for you to use.

> **N O T E**   Microsoft refers to Word as WordMail when you use it as your e-mail editor. Outlook allows you to choose only between RichEdit and WordMail. You cannot use any other editor or word processor to work with e-mail messages within Outlook. ■

After you've initially chosen to use RichEdit or WordMail, you can change your mind at any time. To do so:

1. Choose Tools, Options to open the Options dialog box. Select the E-mail tab shown in Figure 8.1.
2. Click the Use Microsoft Word as the E-mail Editor check box to insert or remove the check mark in it. The check box should contain a check mark if you want to use Word; the check box should be empty if you want to use RichEdit. Choose RichEdit if you want to follow this chapter in detail.
3. Click OK to accept your choice.

If you choose to use WordMail, you can accept the default template EMAIL.DOT, or you can choose another template.

FIG. 8.1
Use the E-mail tab in
the Options dialog box
to select e-mail
options.
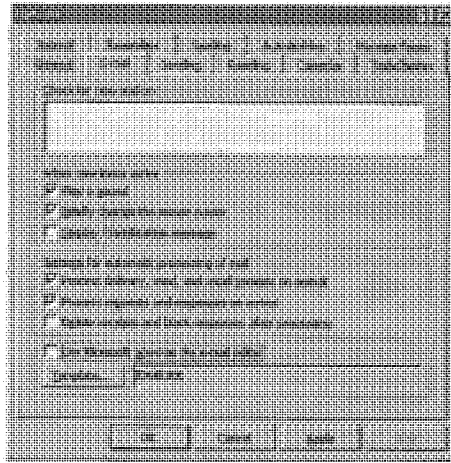
If you only expect to deal with fairly simple e-mail messages, you should probably choose RichEdit as your editor. However, if you want to take advantage of some of Word's sophisticated capabilities, you should choose WordMail. Some of the points to bear in mind before deciding to use WordMail are:

- If Word is not already running when you open Outlook, you have to wait while Outlook opens Word before you can write or edit a message.
- If you decide to keep Word open so that it is instantly available, you have fewer system resources available to work with Outlook or other applications.

Some of the points to consider before deciding to use RichEdit are:

- RichEdit doesn't give you access to spell and grammar checking.
- RichEdit doesn't have Word's advanced capabilities, such as working with tables.

This chapter and the next assume you have decided to use RichEdit as your e-mail editor. See Chapter 22, "Sending and Receiving E-mail from Other Services," for information about working with WordMail. The screen illustrations in this chapter and the next show the menus and toolbar you see when you work with RichEdit; those you see when working with WordMail are, in some instances, somewhat different.

Connecting to a Workgroup

Each computer in the workgroup must have a Network Adapter Card (NIC) installed, and the computers must be interconnected by suitable cables. The subject of interconnecting computers to form a workgroup is beyond the scope of this book. You can find information about this subject in such books as *Upgrading and Repairing Networks,* published by Que.

Establishing a Workgroup Postoffice

E-mail is sent between workgroup members by way of a postoffice that is established on one of the workgroup computers and administered by one of the workgroup members. The postoffice is a central location which contains a mailbox for each workgroup member. Also, the postoffice maintains the names and e-mail addresses of workgroup members in the Postoffice Address Book. Only the postoffice administrator can add and delete mailboxes, and add names to, delete names from, or change names in, the Postoffice Address Book.

If your workgroup already has a postoffice, you don't usually need to know its *address*—its complete file name, including the computer and disk on which it resides—because Outlook normally finds the workgroup postoffice automatically when needed.

N O T E If you don't know whether a postoffice already exists, or have trouble locating it, consult your workgroup administrator.

Creating the Postoffice

N O T E The information that follows involves working with your profile. For more detailed information, refer to Chapter 12, "Working with Profiles."

If your workgroup doesn't have a postoffice, you (or someone else in the workgroup) must create a postoffice and assume the responsibilities of the postoffice administrator.

N O T E Each workgroup can have only one postoffice. You must not create a second postoffice if one already exists.

A postoffice consists of a set of folders on a disk that is accessible from all workgroup computers. Decide which computer, and which disk on that computer, should contain the postoffice folders, and then create a folder that will contain all the subsidiary postoffice folders. You can call this folder anything you like, but it makes sense to call it by a meaningful name such as Postoffice. Make sure the new file is shared so that all workgroup members have access to it.

N O T E If you need help with the process of creating a file and sharing it among workgroup members, consult a book about Windows 95 (such as *Platinum Edition Using Windows 95*, published by Que) or Windows NT (such as *Special Edition Using Windows NT Workstation 4.0*, published by Que).

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After you've created a folder for your postoffice, follow these steps to create the postoffice:

1. If Outlook is already running, choose File, Exit and Log Off to close Outlook and return to the Windows desktop.

2. Choose Start in the Windows taskbar, choose Settings from the Start menu, and choose Control Panel to open the Windows Control Panel.

3. In the Control Panel, double-click Microsoft Mail Postoffice to open the Microsoft Workgroup Postoffice Admin wizard's first dialog box, shown in Figure 8.2.

FIG. 8.2
The Microsoft Workgroup Postoffice Admin dialog box lets you choose between administering an existing postoffice or creating a new one.
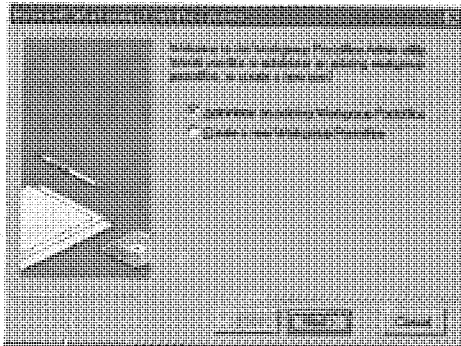
4. Choose Create a New Workgroup Postoffice, and click Next to open the second dialog box shown in Figure 8.3.

FIG. 8.3
The second dialog box lets you choose a location for the new postoffice.
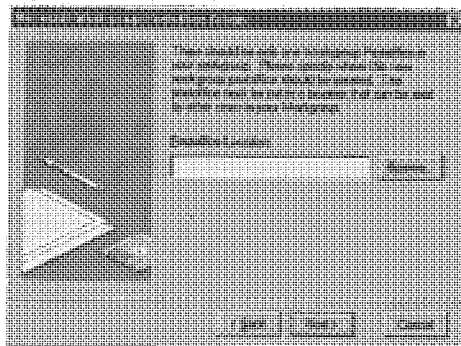
N O T E If this dialog opens showing the address of a postoffice location, you already have a workgroup postoffice. To avoid creating a second postoffice, click Cancel.

5. Click Browse to display a list of disks which are accessible within your workgroup, and expand the disk on which you previously created the folder for the new postoffice.

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6. Choose the folder you previously created for your new postoffice, then click OK to accept your choice. The second dialog box now shows the disk you've chosen. Click Next to open the third dialog box, shown in Figure 8.4.

FIG. 8.4
The third dialog box
confirms the location
of the postoffice and
automatically assigns
a folder name within
the folder you
originally created.
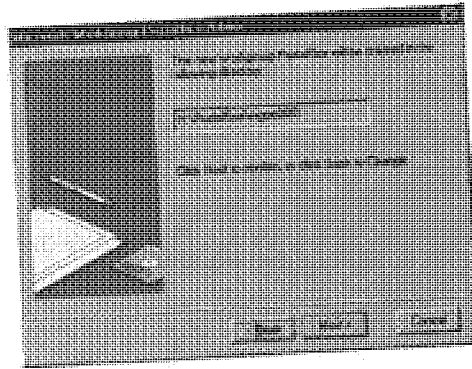
N O T E   If you don't like the name automatically assigned to your postoffice folder, accept it for now. After you've completely finished creating the postoffice, you can change the folder name in the same way that you change any other folder name. Open Windows Explorer, select the postoffice folder name, choose File, Rename, edit the folder name, and press Enter.

7. Click Next to open the Enter Your Administrator Account Details dialog box, shown in Figure 8.5.

8. Enter a postoffice administrator Name (such as Administrator) for yourself, an administrator Mailbox name (such as admin), and replace the provisional Password (PASSWORD) with the password you want to use as administrator, and then click OK. You don't need to provide anything in the other five text boxes, but you can do so if having that information might be useful.

FIG. 8.5
Use the Enter Your
Administrator Account
Details dialog box
to provide informa-
tion about yourself
as the postoffice
administrator.

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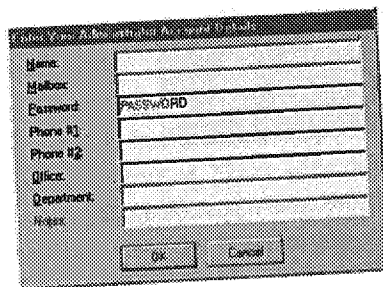
N O T E   The mailbox name you use as the postoffice administrator should be different from your real name because you will want to use your real name for your ordinary e-mail messages. Also, the password you use as administrator should be different from the password you use to access your ordinary e-mail.

Later, after you've created an ordinary e-mail account for yourself, users can send postoffice-related mail to your administrator mailbox, and ordinary mail to your ordinary mailbox.

CAUTION

It's very important that you remember your postoffice administrator password and keep it private. Without that password, neither you nor anyone else can administer the postoffice.

If you lose your administrator password, you'll have to remove the postoffice and create an entirely new one.

9. Read the message that confirms the creation of a postoffice and reminds you about the necessity to share the postoffice directory. Click OK to return to the Control Panel.

10. Close the Control Panel. If you haven't already made the postoffice folder available for sharing, open Windows Explorer, and right-click the postoffice folder to display a shortcut menu. Select Sharing in the shortcut menu to display the Properties dialog box with the Sharing tab selected, as shown in Figure 8.6.

FIG. 8.6
Use the Properties dialog box to share the postoffice folder with workgroup members.
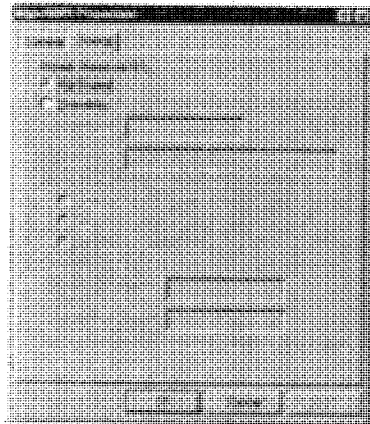
11. If the disk that contains the postoffice folder is already shared, you'll see a note at the top of this dialog box telling you so, as in the preceding figure. If the disk is not already shared, choose Shared As to share the postoffice folder. You can, if you like,

supply a Read-Only password, a Full Access, or both to restrict access to the postoffice. Click OK to accept sharing, and then close Windows Explorer.

N O T E If you enter Read-Only and Full Access passwords, the two passwords must be different.

That completes establishing the postoffice. So far, though, the postoffice only has one member: you, as the postoffice administrator.

Creating Postoffice Mailboxes

In order to interchange e-mail messages, workgroup members must each have a mailbox in the postoffice. Only the postoffice administrator can create, delete, or change postoffice mailboxes.

You already have an administrator mailbox in the postoffice, but you need to create a mailbox for your ordinary e-mail. To do so, follow these steps:

1. Choose Start in the Windows Taskbar, choose Settings from the Start menu, and choose Control Panel to open the Windows Control Panel.

2. In the Control Panel, double-click Microsoft Mail Postoffice to open the Microsoft Workgroup Postoffice Admin wizard's first dialog box (refer to Figure 8.2).

3. Choose Administer an Existing Workgroup Postoffice, and click Next to open the second dialog box which confirms the location of the postoffice.

4. Click Next to open the third dialog box that asks you for the postoffice administrator's mailbox name and password, as shown in Figure 8.7.

FIG. 8.7
You must supply the administrator's mailbox name and password to proceed.

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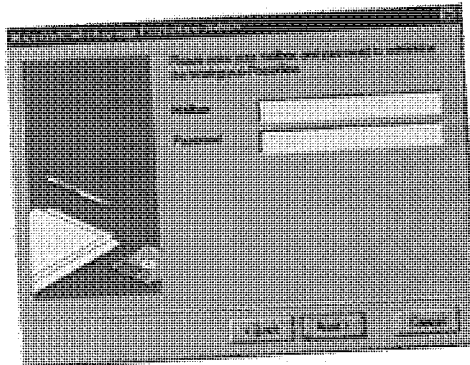
5. Enter the administrator's mailbox name and password. Notice that the password you type appears as asterisks on-screen so that no one can read it. Click Next to proceed. If you entered the correct administrator Mailbox name and password, you see the Postoffice Manager dialog box shown in Figure 8.8. However, if you do not enter the administrator Mailbox name and password correctly, you see a message telling you A Workgroup Postoffice can be managed only by the user who created it. If you see this message, click OK in the message box and then retype the administrator mailbox name and password, correctly this time.

FIG. 8.8
The Postoffice
Manager dialog box
shows the names of
people who currently
have mailboxes.
Immediately after you
create a postoffice,
only the postoffice
administrator has a
mailbox.
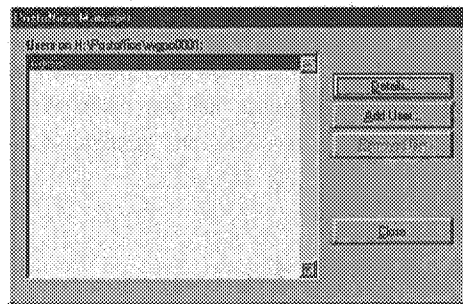
6. Click Add User to display the Add User dialog box shown in Figure 8.9.

FIG. 8.9
Provide information
about yourself as a
user in the Add User
dialog box.
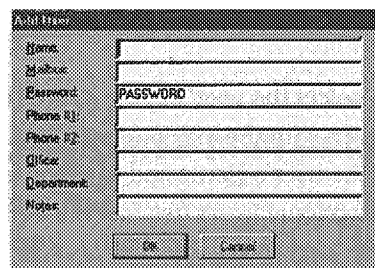
7. Enter your ordinary Name (such as Amy Roberts), a Mailbox name (such as aroberts), and a Password. It's optional whether or not you enter information in the remaining five text boxes. Click OK to complete adding yourself as a user to the postoffice. The Postoffice Manager dialog box reappears with your name added to the list of users.

Repeat steps 6 and 7 to add more users to the postoffice. After you've finished adding users, the Postoffice Manager dialog box will contain the names of all the workgroup members, similar to the list shown in Figure 8.10. Click Close to return to the Windows Control Panel, and then close the Control Panel.

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FIG. 8.10
After you finished adding users' mailboxes, the Postoffice Manager dialog box should look something like this.
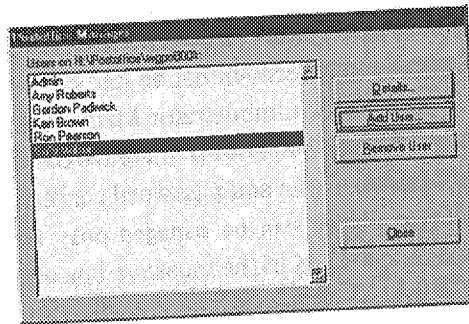
N O T E   When you, as the postoffice administrator, add users to the postoffice, you should provide a temporary password for each user. You can repeat the Mailbox name as the temporary password, if you like. All users should choose their own personal passwords before they start using the postoffice. See "Changing a User Password" later in this chapter for information about how to do so.

Deleting and Changing Postoffice Mailboxes

You can use the Postoffice Manager dialog box to delete a person from the postoffice, something you need to do when a person leaves the workgroup. To delete a user, select that user's name in the Users list, and click Remove User. A message box appears asking you to confirm that you want to delete the user. Click Yes to complete the deletion, otherwise click No.

To change information about a user, select the user's name in the Users list, and click Details to display the details of the user, with the exception of the password, which is shown as asterisks. You can change the user's Name and Mailbox name, and you can change any of the information in the optional lower five text boxes. If users forget their passwords, you can completely delete their passwords and provide new temporary passwords.

When you've finished working with the Postoffice Manager dialog box, close it to return to the Control Panel, and then close the Control Panel.

Adding and Configuring Microsoft Mail

At this time, you have your computer physically connected to other computers in your workgroup, a workgroup postoffice exists, and you have created mailboxes in the postoffice. Now, you and every other workgroup member must provide Outlook with the information it needs to receive e-mail from, and send e-mail to, other users who have

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mailboxes in the postoffice. All workgroup members must have the Microsoft Mail information service in their individual profiles.

To see whether Microsoft Mail already exists in your profile, open Outlook and choose Tools, Services to open the Services dialog box. The Services tab shows a list of services in your profile, such as that in Figure 8.11.

FIG. 8.11
The Services tab in the Services dialog box shows a list of information services in your profile.
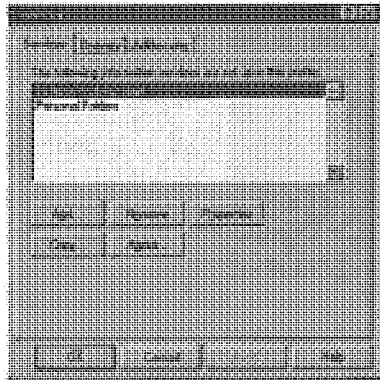
If the list does not include Microsoft Mail, you need to add it. If Microsoft Mail already exists in the list, you may need to configure some of its properties. If Microsoft Mail does not already exist, follow the steps in the following section. If Microsoft Mail does exist, skip the following section and go to the section "Configuring the Microsoft Mail Information Service."

Adding the Microsoft Mail Information Service

With the Service dialog box displayed, click Add to display the Add Service to Profile dialog box shown in Figure 8.12.

FIG. 8.12
The Add Service to Profile dialog box lists services you can add to your profile.
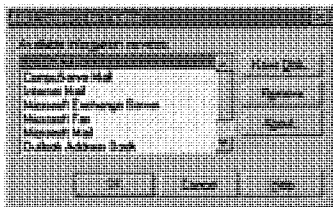
N O T E   The list of available information services you see on your monitor may be different from the list shown in the figure, but will include Microsoft Mail. ▦

Select Microsoft Mail, and then click OK to display the Microsoft Mail dialog box shown in Figure 8.13.

FIG. 8.13
The Microsoft Mail dialog box is where you configure the Microsoft Mail information service. The Connection tab shows the path to your workgroup postoffice.
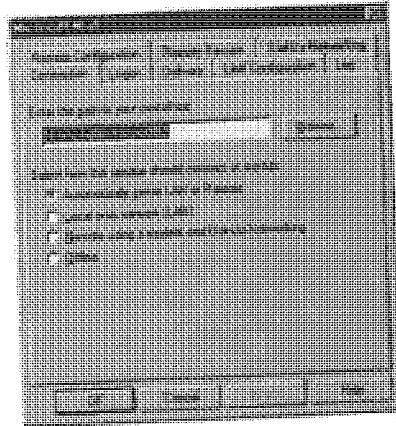
Configuring the Microsoft Mail Information Service

After adding the Microsoft Mail information service to your profile, you have to configure that service.

> **N O T E** If the Microsoft Mail information service is already listed in the Services dialog box, click Properties to open the Microsoft Mail dialog box shown in Figure 8.13.

The following explanation of providing information in the Microsoft Mail dialog box principally assumes you are connecting to a local postoffice. You'll find information about some of the options that are not relevant to this situation explained elsewhere in this book.

The Microsoft Mail dialog box consists of eight tabs, but don't let this overwhelm you: You only need to be concerned with four of these tabs to configure Microsoft Mail for use within a local workgroup. Table 8.1 provides basic information about all these tabs and the chapter of this book in which you can find information about them.

Table 8.1 Microsoft Mail Dialog Box Tabs

Tab	Chapters	Use To Specify
Connection	8 & 9	How your computer is connected to the postoffice
Delivery	8	How mail is transferred between your Inbox and the postoffice

Tab	Chapters	Use To Specify
Dial-Up Networking	26	For remote connection with dial-up networking, defines sessions
LAN Configuration	22	For LAN connection, whether to use mail headers for selecting mail you want to receive and whether to use a local copy of the Address Book
Log	8	A log of session events
Logon	8	Postoffice access information
Remote Configuration	22	For remote connection with dial-up networking, whether to use mail headers for selecting mail you want to receive and whether to use a local copy of the Address Book
Remote Session	26	When to start and end a dial-up networking session

Configuring the Microsoft Mail Connection   The Connection tab displays the path to your postoffice, as shown previously in Figure 8.13.

In most cases, Outlook knows where your workgroup postoffice is and automatically shows the correct path. If the correct path is not shown, ask your workgroup administrator for this information and then use Browse to find and select the path to the postoffice.

The four option buttons in the dialog box enable you to choose the type of connection to the postoffice. The default choice, Automatically Sense LAN or Remote, is usually appropriate. If you choose this, Outlook normally finds the postoffice automatically; if it can't find the postoffice, Outlook prompts you to supply the postoffice address.

Configuring Microsoft Mail Logon   The Logon tab shown in Figure 8.14 is where each user specifies information for the postoffice.

FIG. 8.14
The Logon tab of the Microsoft Mail dialog box sets your mailbox's name and password.

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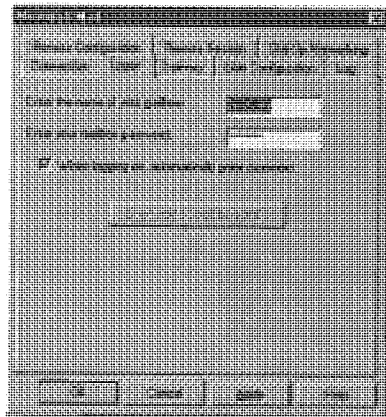
If the Enter the Name of Your Mailbox text box doesn't already contain your mailbox name, enter it into that text box. This is the name the postoffice administrator has already provided for your mailbox, not your ordinary name. If your name is Amy Roberts and the postoffice administrator provided a mailbox named aroberts for you, you should enter aroberts into this text box.

The password you enter in the Enter Your Mailbox Password text box is your current password. If you haven't changed the temporary password that the postoffice administrator originally created, enter that temporary password for the time being.

By default, the When Logging On, Automatically Enter Password check box doesn't have a check mark. If you leave it like this, you will have to supply your password each time you log onto the postoffice. On the other hand, if you place a check mark in this check box, Outlook remembers your password so that you don't have to provide it each time you log on to the postoffice.

N O T E   If you have set up password protection so that only you can access your Windows files, you don't usually need to have separate password protection for your mailbox. In this case, you can safely allow access to your mailbox without requiring entry of a password. On the other hand, if anyone can get into Windows on your computer, you should protect your mailbox by requiring entry of a password.

The preceding advice applies to ordinary office environments. If you are working in an environment in which security is very important, follow the specific password procedures for your environment. ▪

Configuring Microsoft Mail Delivery   The Delivery tab settings control how Outlook receives mail addressed to you and how Outlook sends your outgoing mail to the postoffice. The default settings in this tab, shown in Figure 8.15, are usually satisfactory.

FIG. 8.15
The Delivery tab of the Microsoft Mail dialog box has settings that control how mail is received and sent.

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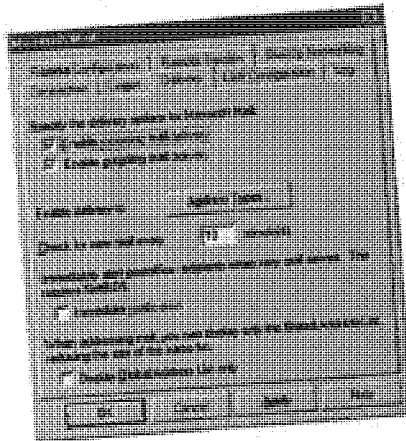
The default check mark in the Enable Incoming Mail Delivery check box is necessary if Outlook is to receive mail from the postoffice. If this check mark is absent, you won't be able to receive mail.

The default check mark in the Enable Outgoing Mail Delivery check box is necessary if Outlook is to send mail to the postoffice. If this check mark is absent, you won't be able to send mail.

By default, Outlook sends most types of mail to the postoffice. If you want to indicate some type of mail that should not be sent to the postoffice, click Address Types to display the Address Types dialog box shown in Figure 8.16. This dialog box lists ten types of mail with a check mark by those types that should be sent to the postoffice. To prevent a specific type of message from being sent to the postoffice, remove the check mark adjacent to that type. Click OK after you've made any changes in the dialog box.

FIG. 8.16
Use the Address Types dialog box to specify which types of mail should be sent to the postoffice.
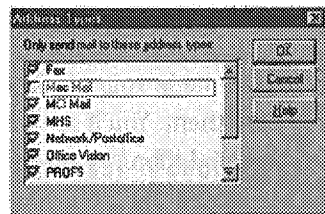
The default value in the Check for New Mail Every text box designates that Outlook should check for new mail in the postoffice every 10 minutes. If you have a local workgroup, this period is reasonable because the process of checking for mail is almost instantaneous. However, if you are working remotely and have a dial-up connection to the postoffice, you should probably set the period to 60 or more minutes because the process of checking for mail can interrupt your work and may incur significant telephone charges.

Configuring the Microsoft Mail Log   You can choose whether or not you want to maintain a log (history) of your mail activities. It's probably a good idea to do so, so that you can check what messages you've received and sent.

To maintain a log, open the Log tab of the Microsoft Mail dialog box, as shown in Figure 8.17.

By default, the Maintain a Log of Session Events check box contains a check mark, and the Specify a Location of the Session Log text box contains the name of the file in which the log will be kept. By default, the log file is created in your Windows folder and is named MSFSLOG.TXT, but you can specify any folder and any name for the log file. If you don't want to maintain a log, remove the check mark.

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FIG. 8.17
Use the Log tab of the Microsoft Mail dialog box to create a history of your mail activities.
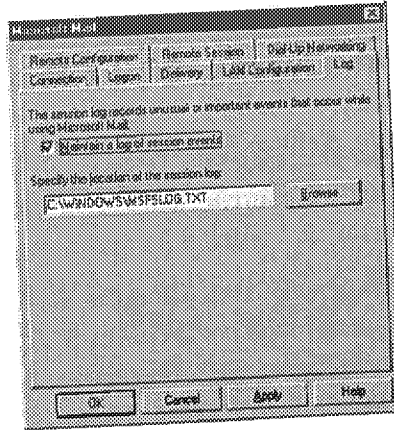
The log file is a text file. After you have used Microsoft Mail for a while, you can open the file and see what it has recorded, as described in "Looking at Your Log File" later in this chapter.

Saving Microsoft Mail Properties   After you've made your choices in the various Microsoft Mail dialog box tabs, click OK to save them. You'll see a message telling you that you must exit and log off on the File menu, and then restart Microsoft Exchange to put your choices into effect. In fact, this message should tell you to restart Outlook.

Click OK to close the message and return to the Services dialog box. Then click OK to close that dialog box. Choose File, Exit and Log Off to close Outlook and return to the Windows desktop.

Double-click the Microsoft Outlook shortcut in the Windows desktop to restart Outlook with the Microsoft Mail information service in effect.

Changing Your User Password

As a postoffice administrator, you provide a temporary password for each user. Before starting to use the postoffice, each user should change that password to something that no one else, not even the postoffice administrator, knows.

Outlook provides a simple means for users to choose their own passwords. After users have configured the Microsoft Mail information service, closed Outlook, and restarted it, each one of them should follow these steps:

1. Choose Tools, Microsoft Mail Tools, Change Mailbox Password to display the Change Mailbox Password dialog box shown in Figure 8.18.

FIG. 8.18
Use this dialog box to
change your mailbox
password.
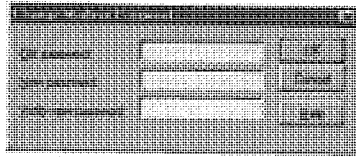
2. In the Old Password text box, type the temporary password the postoffice adminis-
   trator provided.

3. In the New Password text box, type the password you want to use. The characters
   you type are shown on-screen as asterisks so that anyone who's watching over your
   shoulder can't see what you typed.

4. In the Verify New Password text box, type the password you want to use again.
   Again, the characters are shown as asterisks. Outlook requires you to type the new
   password twice to make sure you type it correctly.

5. Click OK to accept the new password. Outlook confirms the operation by displaying
   a message box that says Your password has been changed.

Selecting E-mail Options

There are several options you can use to control what happens when you receive e-mail.
To access these options, choose Tools, Options to display the Options dialog box. If neces-
sary, select the E-mail tab shown in Figure 8.19. This tab has four sections, each of which
is described separately in the following sections.

FIG. 8.19
The E-mail tab of the
Options dialog box
lets you choose what
happens when mail
arrives.

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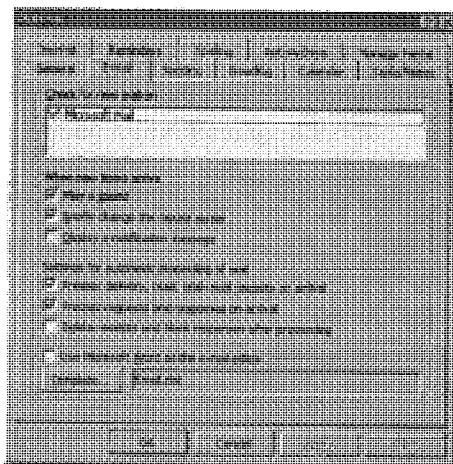
Checking for New Mail

The Check for New Mail section at the top of the E-mail tab contains a list box that lists the types of mail Outlook can receive. Figure 8.19 shows only Microsoft Mail. If your profile contains other sources of mail, such as cc:Mail, CompuServe Mail, and Internet Mail, you will see those listed here.

By default, each source of mail is checked to indicate that Outlook should check for that type of mail. With Microsoft Mail checked, Outlook will check for Microsoft Mail at the interval set in the Microsoft Mail dialog box's Delivery tab (the default value is 10 minutes). If other sources of mail are listed and checked, Outlook will check those sources for mail at the intervals chosen for them in their Properties dialog boxes.

N O T E   The options you choose here determine how Outlook automatically looks for new mail at specific intervals. As explained in "Receiving the Message" in Chapter 9, you can use a command to make Outlook look for new mail whenever you want. ▓

Being Alerted to Mail Arrival

The second section of the dialog box lets you choose how you want to be notified when new mail arrives. You can choose any combination of these three possibilities:

- ▓ Play a Sound
- ▓ Briefly Change the Mouse Cursor
- ▓ Display a Notification Message

If you have a sound card installed in your computer and want an audible notification when a new message arrives, place a check mark in the Play a Sound check box, and click OK to save the options settings. After you've done so, follow these steps to choose the sound to be played:

1. Click OK to close the Options dialog box. Then choose File, Exit and Log Off to close Outlook and return to the Windows desktop.
2. Choose Start in the Windows taskbar, and choose Settings, Control Panel to open the Control Panel.
3. Double-click Sounds in the Control Panel to open the Sounds Properties dialog box. Scroll down the Events list and choose New Mail Notification, as shown in Figure 8.20.

FIG. 8.20
Use the Sounds
Properties dialog box
to choose the sound
you want to hear
when a new message
arrives.
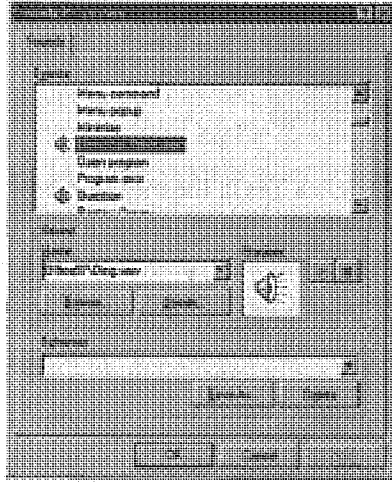
4. If you want to accept the default sound (DING.WAV) shown in the Name text box, ignore step 5 and proceed directly to step 6.

5. Choose Browse to open the Browse for New Mail Notification Sound dialog box, choose a sound, and click OK. After you've done so, the Name text box in the Sounds Properties dialog box contains the name of the sound you've chosen.

6. Click OK to close the Sounds Properties dialog box, then close the Control Panel.

From now on, you will hear the chosen sound whenever a new message arrives. Open Outlook again to continue.

You can also choose to be alerted visually whenever new mail arrives by selecting an option in the E-mail tab of Outlook's Options dialog box. To receive a visual notification, place a check mark in the Briefly Change the Mouse Cursor check box, and click OK to save the option settings. After doing so, your mouse cursor will change briefly to a mail message symbol when a new message arrives.

N O T E   Microsoft isn't kidding about "briefly." The mail message symbol appears and disappears so quickly that you'll miss it if you blink at the wrong time!

The third notification option is to have Outlook display a message on your screen when a new mail message arrives. To do so, open the E-mail tab in the Options dialog box again, place a check mark in the Display a Notification Message check box, and click OK to save the options settings. Subsequently, when a new message arrives, you see the notification message shown in Figure 8.21.

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FIG. 8.21
Outlook displays this
notification when a
new message arrives.
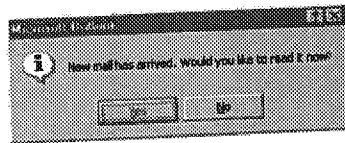
If you want to read the new message, click Y̲es in the message box to see the new message in the Message dialog box. Otherwise, click N̲o, in which case Outlook adds the new message to the Inbox Information Viewer so that you can read it later. Refer to "Understanding the Inbox Information Viewer in Chapter 9 for information about the Message dialog box.

Processing New Mail

The third section of the E-mail tab in the Options dialog box lets you choose how Outlook processes incoming mail. You can choose any combination of:

- *Process Delivery, Read, and Recall Receipts on Arrival.* If you check this, Outlook automatically places a message in your Inbox subfolder whenever mail is delivered, read, or recalled.
- *Process Requests and Responses on Arrival.* When this check box is checked, Outlook automatically places meeting requests on your calendar and places responses to meeting requests in your Meeting Planner. Refer to Chapter 14 for information about planning meetings.
- *Delete Receipts and Blank Responses After Processing.* When this check box is checked, Outlook moves responses to your meeting requests that have no comments to your Deleted Items subfolder. If you are sending mail by way of Exchange Server, Outlook moves notifications received when mail is delivered, read, or recalled to your Deleted Items subfolder. Outlook also places meeting responses on your calendar. Refer to Chapter 14 for information about meeting requests.

If you are using Outlook just within a workgroup, you should initially check the second option and leave the first and third options unchecked.

Choosing an E-mail Editor

Use this section to choose between using RichEdit or WordMail as your e-mail editor and, if you choose WordMail, which Word template to use. As mentioned previously, this chapter and the next assume you are using RichEdit, so there should be no check mark in the Use Microsoft W̲ord as the E-Mail Editor check box.

After you've set the options, click OK at the bottom of the dialog box to save those options and close the Options dialog box.

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Inspecting Your Log File

As mentioned earlier in this chapter, the default properties for the Microsoft Mail information service include creating a log file in which Outlook creates records of the mail you send and receive, as well as certain other activities. The log file, named MSFSLOG.TXT, is in text format in your Windows directory.

To inspect your log file, close (or minimize) Outlook, then follow these steps:

1. Click Start in the Windows taskbar to display the Start menu.

2. Choose Programs, Accessories, Notepad to open the Windows Notepad.

3. In Notepad, choose File, Open to display the Open dialog box.

4. Choose the folder that contains your log file. If you're using the Outlook default, this is your Windows folder.

5. Select the log file. If you're using the Outlook default, this is MSFLOG.TXT.

6. Click Open to open the log file. Figure 8.22 shows part of a typical log file.

FIG. 8.22

The log file shows the date and time of each major Microsoft Mail activity.

You can print the log file by choosing File, Print. After you've finished looking at the log file, close Notepad and then restore (or reopen) Outlook.

N O T E   Outlook adds items to the log file each time you send and receive mail, but doesn't automatically archive or delete items from the file. To avoid cluttering your hard drive with unneeded information, you should periodically remove older items from the log file. ■

Preparing Subfolders and Categories

Outlook automatically saves all the messages you receive in your Inbox subfolder and all the messages you send in the Sent Items subfolder. Both these folders are within your Personal Folders folder. You can assign one or more categories to each message as a means of classifying it.

Creating Subfolders

When you first start to use Outlook to receive and send messages, you might be satisfied to save all of them in these two subfolders. The more messages you receive and send, though, the more it will become apparent that you need a more elaborate set of subfolders. There is no folder structure that suits everyone's needs: You need to plan a structure that suits your personal needs.

As a starting point, you might want to create a subfolder named Messages, and under that, create separate subfolders for personal and business messages, and also for any special interests you have.

Follow these steps to create a new Messages subfolder within your Personal Folders folder:

1. With any Information Viewer displayed, click Folder List in the toolbar to display the folder list.
2. Select Personal Folders and then choose File, Folder, Create Subfolder (or press Ctrl+Shift+E) to display the Create New Folder dialog box shown in Figure 8.23.
3. In the Name text box, type a name (such as Messages) for the new subfolder.
4. Open the Folder Contains list and choose from the list of item types. In this case, choose Mail Items.
5. Check the Make This Folder a Subfolder Of list to make sure Personal Folders is selected.
6. If you like, enter a description of the new subfolder in the Description text box.
7. Click OK to create the new subfolder. The folder list now contains the name of the new subfolder, and an icon indicating the type of item it contains, as shown in Figure 8.24.

FIG. 8.23
Use the Create New Folder dialog box to create a new subfolder.
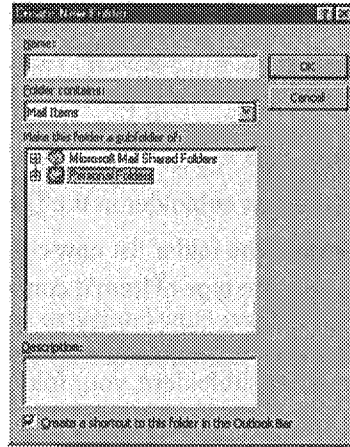
FIG. 8.24
The name of the new subfolder appears in the folder list.

New folder
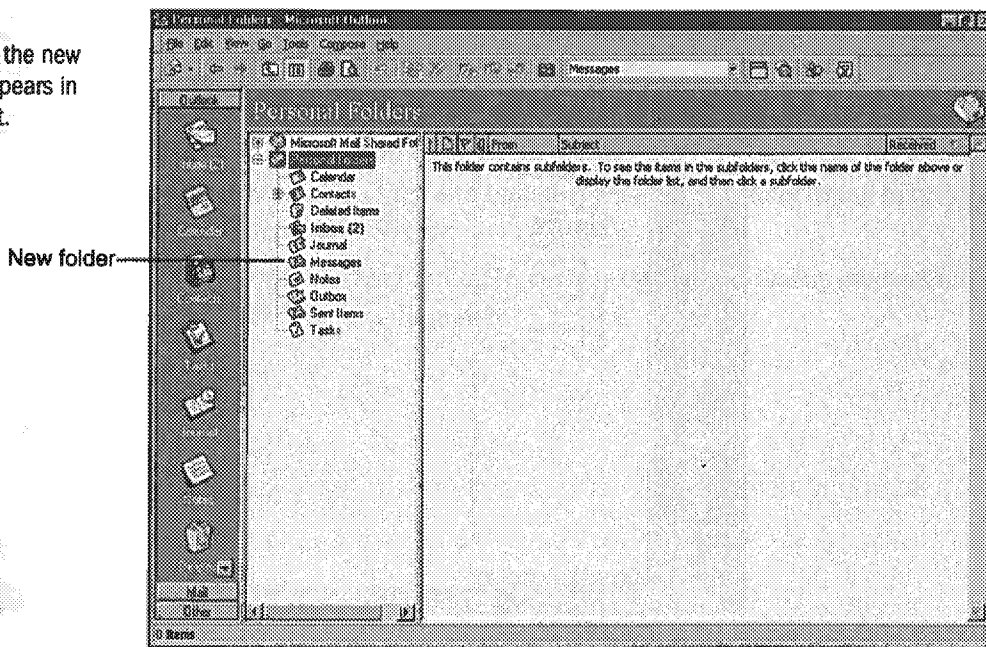
Follow these steps to create a subfolder named Personal within the Messages subfolder you just created:

1. With any Information Viewer displayed, click Folder List in the toolbar to display the folder list.

2. Select the Messages subfolder you just created, and then choose File, Folder, Create Subfolder (or press Ctrl+Shift+E) to display the Create New Folder dialog box shown previously in Figure 8.23.

3. In the Name text box, type a name (such as Personal) for the new subfolder.

4. Open the Folder Contains list and choose from the list of item types. In this case, choose Mail Items.

5. Check the Make This Folder a Subfolder Of list to make sure Messages is selected.

6. If you like, enter a description of the new subfolder in the Description text box.

7. Click OK to create the new subfolder. The folder list now contains the name of the new subfolder, and an icon indicating the type of item it contains.

Repeat steps 2 through 7 to create subfolders for other types of mail, such as Business and Special. After you've completed creating subfolders, your folder list should look something like that in Figure 8.25.

FIG. 8.25
This is an example of a folder list after you've created several subfolders.
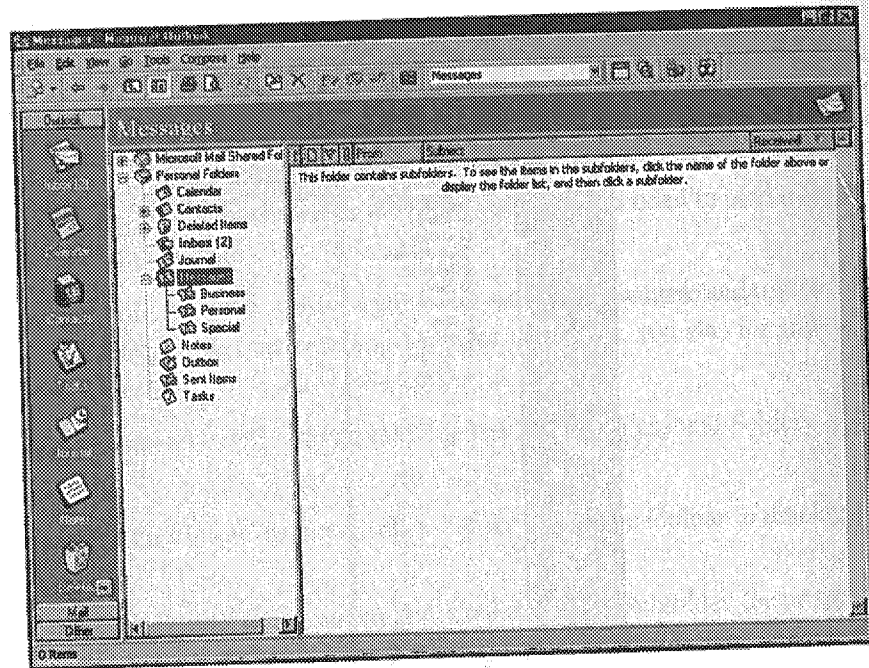
After you've created these subfolders, you can easily move mail items into them from the Inbox and Sent Items folders, as described in "Saving Mail Items" in Chapter 9.

Working with Mail Categories

Rather than create an overly elaborate structure of subfolders, it's usually better to have a fairly simple set of subfolders, as described in the previous section, and use categories to classify message items.

▶ **See** "Working with Categories," **p. 68** (Ch. 3)

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One important advantage to using categories is that you can assign several categories to each message item. Subsequently, as you'll see in "Viewing Messages" in Chapter 9, you can easily display messages sorted by category, as well as by recipients' and senders' names.

From Here...

This chapter has explained what you need to do to be ready to interchange e-mail messages among workgroup members. Now you can begin using Outlook as your e-mail message center.

- Chapter 9, "Receiving and Sending Microsoft Mail Messages," describes how to send and receive e-mail messages within a workgroup.
- Refer to Chapter 20, "Sending and Receiving Internet E-mail," for information about sending and receiving e-mail by way of the Internet.
- Chapter 22, "Sending and Receiving E-mail from Other Services," introduces you to using WordMail as your e-mail editor. It also covers sending and receiving e-mail by way of information services such as CompuServe, as well as interfacing to cc:Mail, Lotus Notes, and Exchange Server.
- For information about working remotely, such as by way of a dial-up connection, refer to Chapter 26, "Working Remotely."

CHAPTER

9

Receiving and Sending Microsoft Mail Messages

by Gordon Padwick

Outlook lets you receive and send e-mail and fax messages. You can interchange e-mail messages with people within your local workgroup and with people who have access to your LAN or WAN. You can also receive messages from, and send messages to, people throughout the world by way of the Internet and such services as America Online and CompuServe, and you can send messages to people who use pagers.

The messages you send and receive are not limited to plain text. Outlook takes advantage of Rich Text Format (RTF) to let you use a variety of fonts, font sizes, font styles, and font colors, as well as to format the text. Also, Outlook lets you include graphic and other objects in your messages. In fact, you can send and receive anything you can create on your computer.

This chapter focuses on using Outlook to receive and send messages within a local workgroup. Subsequent chapters provide information about interchanging messages in other environments, such as by way of Exchange Server on a LAN, CompuServe, the Internet, and cc:Mail.

━ **Understanding how Outlook receives workgroup messages**

Outlook displays messages you've received in the Inbox Information Viewer.

━ **Sending and receiving text messages**

You can use Outlook to send and receive text messages.

━ **Sending and receiving more sophisticated messages**

Outlook can format text in messages, insert files, items, and objects, flag and track messages, and allow message recipients to vote.

━ **Replying to and forwarding messages**

You can reply to messages you've received and forward messages to other people.

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Preparing to Receive and Send Workgroup Messages

In order to interchange messages within a local workgroup, your computer must, of course, be connected to others in the workgroup, the workgroup must have a postoffice, and you (and other workgroup members) must have the Microsoft Mail information service in your profile. If necessary, refer to Chapter 8 for information about these subjects.

The workgroup members with whom you interchange messages must have a compatible messaging application installed. Compatible applications include Outlook, Exchange Client, and Windows Messaging (the updated version of Exchange Client).

In Chapter 8, you learned that you can use Outlook's RichEdit editor to create and edit messages or you can use WordMail (if you have Word installed on your computer). This chapter assumes you're using the RichEdit editor.

See "Choosing an E-mail Editor," **p. 204**

Understanding the Inbox Information Viewer

Outlook displays messages you receive in the Inbox Information Viewer, shown in Figure 9.1. To display this Information Viewer, click the Inbox shortcut in the Outlook Bar.

See "Understanding the Outlook Window," **p. 27**

FIG. 9.1
The Inbox Information Viewer shows a list of messages you've received that are saved in your Inbox subfolder.

Importance
Message status
Message flagged
Attachment

Status bar

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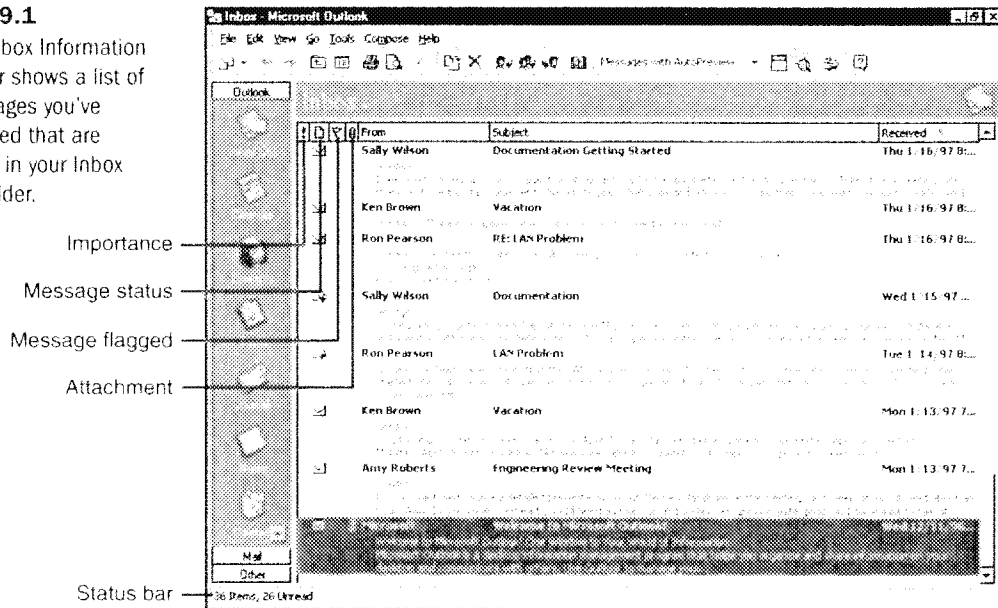
N O T E The preceding figure shows the Messages view of the messages in your Inbox. If you see a different view on your screen, open the Current View list in the toolbar, and choose Messages.

When you first open the Inbox Information Viewer, the Welcome to Microsoft Outlook message, which is automatically placed in your Inbox the first time you open Outlook, is among the messages listed. This message is highlighted at the bottom of Figure 9.1. If Outlook has received other messages since it was installed, these messages are also listed. If you previously used Exchange to receive messages, those messages are included in the list. By default, the messages you've received are shown in reverse date order with the most recent messages at the top.

The status bar at the bottom of the window shows the total number of items in your Inbox subfolder and separately shows the number of items that are unread.

As explained in Chapter 2, you initially see only the title and first three lines of each message you haven't read, and only the title of messages you have read. This is because Outlook uses the Messages with AutoPreview view by default. Double-click anywhere on the title (or first three lines) of a message displayed in the Information Viewer to see the message in detail, including embedded graphics, in the Message dialog box, as shown in Figure 9.2.

FIG. 9.2

The Message dialog box shows an entire message. Here, you see the beginning of the Welcome to Microsoft Outlook! message.
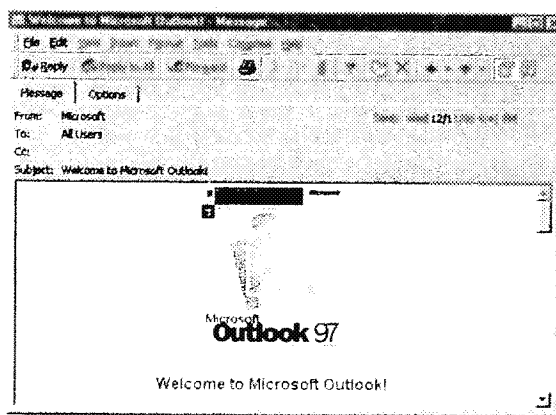
After you've finished looking at a message in the Message dialog box, close the dialog box by clicking the Close button at the right end of the title bar. After you close the Message dialog box, the Information Viewer shows only the title of the message. Notice that the icon at the left changes. Messages you haven't read are marked with a closed envelope icon; messages you have read are marked with an open envelope icon.

N O T E If, in the Information Viewer, you see only a single line for each message, click the AutoPreview button in the toolbar to see the first three lines of each unread message. You can click the AutoPreview button again to go back to seeing only a single line for each message.

AutoPreview is a useful tool to take a quick look at messages and decide which are junk mail you want to delete without even reading.

Deleting a Message

To delete a message, select it in the Information Viewer, then press Delete to remove the message. Deleting actually moves the message from the Inbox subfolder to the Deleted Items subfolder. Refer to "Deleting a Note" in Chapter 6 for information about deleting items by moving them to the Deleted Items subfolder, and also about recovering items from the Deleted Items subfolder.

Indicating Message Status

The four narrow columns at the left of the Inbox Information Viewer shown in Figure 9.1 provide some basic information about each message. The first column is empty if a message is of normal importance. Otherwise, the column contains one of the symbols listed in Table 9.1.

Table 9.1   Symbols Indicating Message Importance

Symbol	Meaning
!	High importance (red)
↓	Low importance

N O T E See "Setting the Message Importance" later in this chapter for more information about importance.

The second column identifies the type of message, as listed in Table 9.2.

Table 9.2   Symbols Indicating Type of Message

Symbol	Meaning
	Read message
	Unread message
	Forwarded message
	Replied to message
	Saved or unsent message
	Sealed message
	Digitally signed message
	Microsoft Mail 3.x form, such as Team Manager form
	Posted message
	Message recall attempt
	Notification of successful message recall
	Notification of unsuccessful message recall
	Notification of delivered message
	Notification of read message
	Notification of message not delivered
	Notification of message not read
	Accepted meeting request

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Table 9.2   Continued

Symbol	Meaning
	Tentatively accepted meeting request
	Declined meeting request
	Canceled meeting
	Task request
	Accepted task
	Declined task
	Conflict notification for offline folder message

The third column indicates the flagged status of a message, as listed in Table 9.3. If the message is not flagged, or is flagged with other than a follow-up or complete flag, this column is blank.

Table 9.3   Symbols Indicating Message Flags

Symbol	Meaning
	Flagged for follow-up
	Flagged as complete

N O T E   See "Flagging a Message" later in this chapter for more information about message flags.

The fourth column is blank if the message doesn't have any attachments. If the message has one or more attachments, this column contains the paper clip symbol.

N O T E   See "Inserting a File or Item into a Message" and "Inserting an OLE Object" later in this chapter for more information about attachments.

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Sending and Receiving a Simple Message

In this section you'll gain some initial experience with sending and receiving messages within your workgroup by sending a message to yourself. You can use this technique as you learn more about messaging and want to experiment with what you've learned. You can even use this technique on a computer that isn't part of a workgroup, as long as you create a postoffice on that computer.

> See "Establishing a Workgroup Postoffice," **p. 188**

Confirming Your Setup

You should follow the steps described here before attempting to send your first message to yourself, so that you know your profile is setup correctly. Outlook normally sets the properties referred to in the following steps correctly. However, if these properties are not set correctly, you may not see messages that are sent to you. The steps listed here are not strictly necessary, but by going through them, you'll learn what to look for if, subsequently, you are not receiving messages.

To confirm your setup, follow these steps:

1. Choose Tools, Services to display the Services dialog box. This should show that your profile contains the Microsoft Mail information service. If it doesn't, refer to "Adding and Configuring Microsoft Mail" in Chapter 8 for information about how to add the Microsoft Mail information service to your profile.

2. Select Microsoft Mail in the Services dialog box, and choose Properties to display the Microsoft Mail dialog box. Select the Logon tab to confirm your mailbox name. If the mailbox name is not correct, change it.

3. Select the Delivery tab in the Microsoft Mail dialog box. Verify that the Check for New Mail Every text box is set to the default value of 10 minutes.

4. Click OK to dismiss the Microsoft Mail dialog box, then click OK to dismiss the Services dialog box.

5. Choose Tools, Check for New Mail On to display the Check for New Mail On dialog box. Verify that the Check for New Mail on the Following Services list contains Microsoft Mail and that the check box adjacent to Microsoft Mail contains a check mark.

6. Choose Tools, Options to display the Options dialog box. If necessary, select the E-mail tab. Verify that the Check for New Mail On list box contains Microsoft Mail and that the check box adjacent to Microsoft Mail contains a check mark.

Now you are ready to send and receive your first message.

Creating a Message

With the Inbox Information Viewer displayed, click the New Mail Message button in the toolbar (alternatively, choose Compose, New Mail Message, or press Ctrl+N) to display the Message dialog box shown in Figure 9.3.

FIG. 9.3
Use the Message
dialog box to create
a new message.
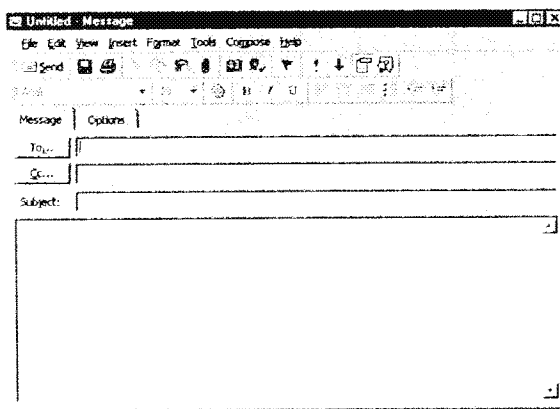
N O T E   If the Message dialog box on your screen doesn't contain the Cc and Subject text
boxes, click the Message Header button in the Message dialog box toolbar to display
these text boxes.

The first step in creating a message is to provide the name of the intended recipient (or recipients). To do so, click the To button to display the Select Names dialog box shown in Figure 9.4.

FIG. 9.4
Use the Select Names
dialog box to select
the name of the
message recipient.

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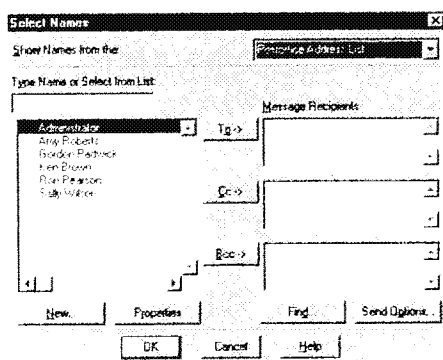
The Select Names dialog box opens with one of your address lists selected, most likely the Contacts list. To send a message to someone in your workgroup, you need to select a name from your Postoffice Address List. To display this list, open the Show Names from The list box, and choose Postoffice Address List. After doing that, the large list box at the left of the dialog box shows the names of people who have mailboxes in your postoffice, similar to that shown in Figure 9.4. With the names of people who have mailboxes displayed, follow these steps to select the recipient:

1. You are sending this first message to yourself, so select your own name in the list at the left side of the dialog box.

2. Click To to copy the name into the Message Recipients list at the right side of the dialog box.

3. If you want to send the message to a second recipient, select that recipient's name and click To to add that name to the list of recipients. Add as many recipients as you like in this way.

N O T E Instead of selecting names one at a time, you can select the first name and then hold down Ctrl while you select more names. You can also select consecutive names by selecting the first name and then holding down Shift while you select the last consecutive name. After selecting multiple names in this way, click To to copy those names into the Message Recipients list.

You can specify the names of people who are to receive copies of the message by selecting names and clicking Cc, and you can specify the names of people who are to receive blind copies of the message by selecting names and clicking Bcc.

N O T E When you specify the names of people who are to receive copies of a message, those people receive a copy of the message and their names appear on the messages that all recipients receive. When you specify people who are to receive blind copies of a message, those people receive a copy of the message but their names don't appear on the messages that other recipients receive.

After you've specified all the recipients' names, click OK to return to the Message dialog box which now shows the names of all recipients.

The second step in creating a message is to provide a title. To do this, place the insertion point in the Subject text box and enter a short description of the message subject. Later, when you explore Outlook in more depth, you'll find that the text you place in the Subject text box is in a field called "Conversation." Strange, but that's the way Outlook works.

N O T E   As with most Windows applications, you can press Tab to move the insertion point
from one box to the next. You can also press Shift+Tab to move the insertion point from
one box to the preceding box. You can also just click in a box to place the insertion point there.

Now you're ready to type the text of the message. Place the insertion point in the large
text box at the bottom of the dialog box and type your message. After doing so, your Mes-
sage dialog box should look something like the one in Figure 9.5.

FIG. 9.5
The completed
Message dialog box
contains the names
of the recipient or
recipients, the subject,
and the text of the
message.
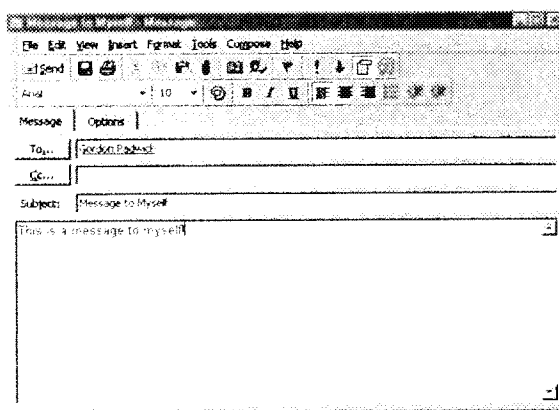
Sending the Message

Now you're ready to send the message. To do so, click Send in the Message toolbar. After
a short delay, the Message dialog box disappears.

Outlook saves each message you send in two places: in your Sent Items subfolder and in
the postoffice. To verify that the message has actually been sent, click Mail at the bottom
of the Outlook toolbar and then click the Sent Items shortcut to display the Sent Items
Information Viewer. The top item in the list should be the message you just sent to your-
self. The fact that the message is listed here confirms Outlook has sent it to the postoffice,
but does not confirm it has arrived in the recipients' Inboxes, nor does it confirm that the
recipients have read the message.

N O T E   See "Setting Tracking Options" later in this chapter for information about confirming
that recipients have received your message.

The postoffice saves one copy of your message, even if you sent it to several people. The
postoffice also places a message notification in each recipients' mailbox.

N O T E   If you sent the message to yourself, and you had asked for notification when a message arrives (as described in Chapter 8), a message telling you that new mail has arrived will appear on your screen soon after you send it. This message will not appear, or course, if you send the message to someone else.

Receiving the Message

Under normal circumstances, Outlook looks for messages at regular intervals—a process known as *polling*. The steps listed above under "Confirming Your Setup" were recommended to ensure that Outlook is set up to do regular polling. If you followed those steps, Outlook looks for Microsoft mail messages in the workgroup postoffice every 10 minutes.

One way you can receive the message you just sent to yourself is to do nothing except wait for no more than 10 minutes. If you have the Inbox Information Viewer displayed, the message will appear at the top of the list of messages when Outlook polls the postoffice.

If you're impatient to see the message, you can instruct Outlook to poll the postoffice immediately. First, verify that Outlook is set to check for new mail from the workgroup postoffice. To do so, choose Tools, Check for New Mail On to display the Check for New Mail On dialog box shown in Figure 9.6. Make sure that Microsoft Mail is listed and that the check box at the left of Microsoft Mail contains a check mark. Click OK to close the dialog box.

FIG. 9.6
The Check for New Mail On dialog box should show that Outlook is set to look for Microsoft Mail.
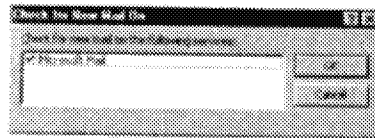
You only need to verify that Microsoft Mail is selected once. After you've done that, the setting remains until you change it.

From now on, you can tell Outlook to look for new Microsoft Mail by choosing Tools, Check for New Mail (or pressing F5). Outlook displays an animated message box shown in Figure 9.7 while it polls the postoffice and retrieves your messages. You see the envelope flying from the sender on the left to the recipient on the right.

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FIG. 9.7
Outlook displays this
message box while it
polls the postoffice
and retrieves
messages.

After you've received the message you sent to yourself, double-click the message
notification in the Inbox Information Viewer to see the complete message in the
Message dialog box.

Being Notified When a Message Arrives

The process of receiving a message described above assumes that you have the Inbox
Information Viewer displayed. While that's fine when you are confirming that you can
send and receive e-mail messages, it's not how you will normally work. More likely you
will have a different Information Viewer displayed or, even more likely, you will have
Outlook minimized while you work with another application.

N O T E   You must have Outlook running, although it can be minimized, in order to be notified
when a new message arrives.

You can control how Outlook notifies you when a message (Microsoft Mail or other) ar-
rives by a setting in the E-mail tab of the Options dialog box. To receive notifications,
place a check mark in the Process Delivery, Read, and Recall Receipts on Arrival check
box.

Being Notified When Mail Arrives

After you've asked to be notified about mail delivery, as explained in the preceding para-
graph, Outlook notifies you when mail arrives at the postoffice.

N O T E   This notification doesn't confirm that the recipient has received or opened your
message.

The notification you see in the Information Viewer, similar to that highlighted at the top of
Figure 9.8, is shown as being from the System Administrator. Notice that the symbol in
the second narrow column at the left is different from those that mark ordinary messages
you've received. You can double-click the notification from the System administrator to
see a more detailed message.

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FIG. 9.8

A message from the System Administrator notifies you when a message you send is received by the postoffice.
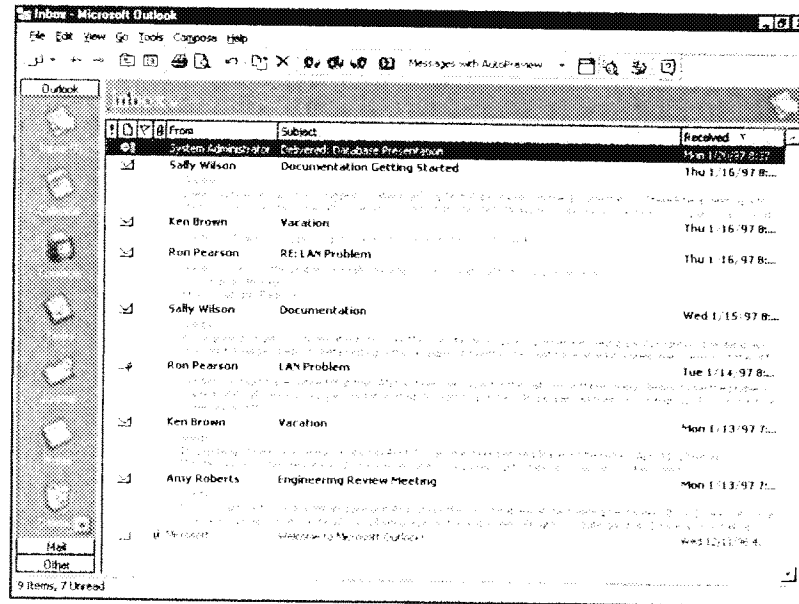
Part

Ch

Being Notified About Delivery Problems

Outlook does a good job of notifying you if a message can't be delivered. For example, it won't let you send a message to someone who doesn't have a mailbox.

Checking Names Automatically   In the previous section, "Creating a Message," you chose the name of the message recipient from a list of people who have mailboxes in the postoffice. You can, though, type a name instead of choosing it. When you type a name, there is always the possibility that you will type the name incorrectly or type a name for which there is no mailbox.

By default, Outlook automatically checks the names you enter in the To, Cc, and Bcc text boxes in the Message dialog box. To verify that automatic name checking is in effect, choose Tools, Options to open the Options dialog box and choose the Sending tab. For automatic name checking to be active, there should be a check mark in the Automatic Name Checking check box. This check mark should always be present because there's unlikely to be any reason why you wouldn't want to take advantage of automatic name checking.

If you enter a recipient's name that isn't in the Postoffice Address List, Outlook displays the Check Names dialog box shown in Figure 9.9 when you attempt to send the message.

FIG. 9.9
The Check Names
dialog box gives you
an opportunity to add
a new name to your
address list, or to
choose an existing
name.
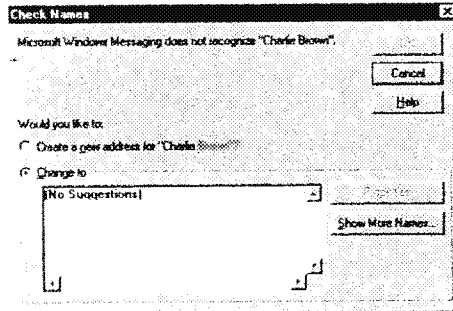
If you choose Create a New Address, click OK to display the New Entry dialog box in which you can choose which address book to use and then provide information about the new name—see Chapter 13 for more information about this. Alternatively, you can choose Change To and then choose Show More Names to display the Address Book dialog box in which you can choose a name that already exists in one of your address books.

Detecting Postoffice Connection Problems   Another possibility is that you start to create a message and, before you send it, the postoffice becomes unavailable; the computer on which the postoffice files exist may have been turned off or may have developed a problem, or the network cables that connect your computer to the postoffice computer may have become disconnected. If this happens, Outlook places an error message, such as the one shown at the top of the list of messages in Figure 9.10, in your Inbox.

FIG. 9.10
Outlook places an
error message from
the System Adminis-
trator in your Inbox if a
message you send
cannot be delivered to
the postoffice.

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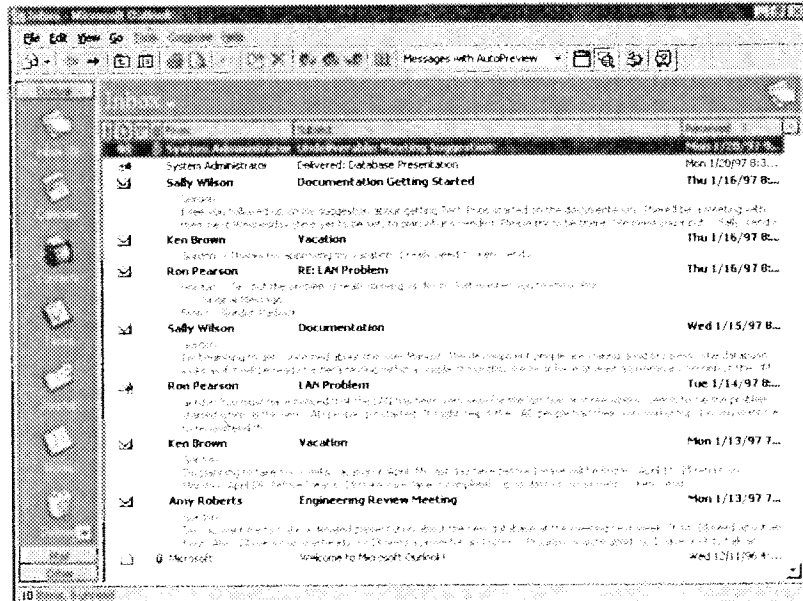
The message from the System Administrator starts with the word Undeliverable. The symbol in the second column of the Information Viewer is different from the one that identifies a "Delivered" message from the System Administrator. You can double-click the message to see more details. For example, if you've sent the message to several recipients, you'll see the names of those recipients to whom the message couldn't be delivered.

CAUTION

Don't assume that every message in your Sent Files subfolder has been satisfactorily delivered to the postoffice. When a message can't be delivered to the postoffice, Outlook places it in the Sent Files subfolder, just as if it had been satisfactory delivered.

If you send a message to several recipients, you might see two messages from the System Administrator. One message confirms delivery to some postoffice mailboxes; the other message tells you that the message couldn't be delivered to some mailboxes.

Sending a Message Later

You don't necessarily have to send a message as soon as you've created it. After you've created a message, you may want to think about it for a while before you send it—that's often a good thing to do, particularly if the message is important. Also, if you find there's a problem with the postoffice, you need to keep the message and try sending it later.

After you've created a new message, you normally click Send in the Message dialog box toolbar to send the file immediately to the postoffice. To save the message instead of sending it, follow these steps:

1. In the Message dialog box (refer to Figure 9.5), choose File, Copy to Folder to open the Copy Item To dialog box shown in Figure 9.11.

FIG. 9.11
Use the Copy Item To dialog box to choose the subfolder into which you want to copy your new message.

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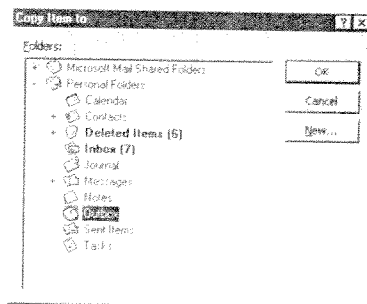
2. Select Outbox and click OK to copy the new message into the Outbox subfolder.

3. Close the Message dialog box. If a message box asks you if you want to save changes, click Yes.

At a later time, when you're ready to send the message, select the Mail section of the Outlook Bar and click the Outbox shortcut to display the Outbox Information viewer, then double-click the message to display it in the Message dialog box. A message in this dialog box tells you This message has not been sent. At this stage, you can edit the message if necessary, and then click Send to send it.

An alternative way to delay sending a message is to proceed as follows. After you've prepared the message, choose File, Save, and then close the Message dialog box. The Information Viewer shows the saved message without any name in the From column, and with a unique symbol in the second narrow column at the left, as shown in Figure 9.12.

FIG. 9.12
The message shown at the top of this Information Viewer has been saved but not sent.
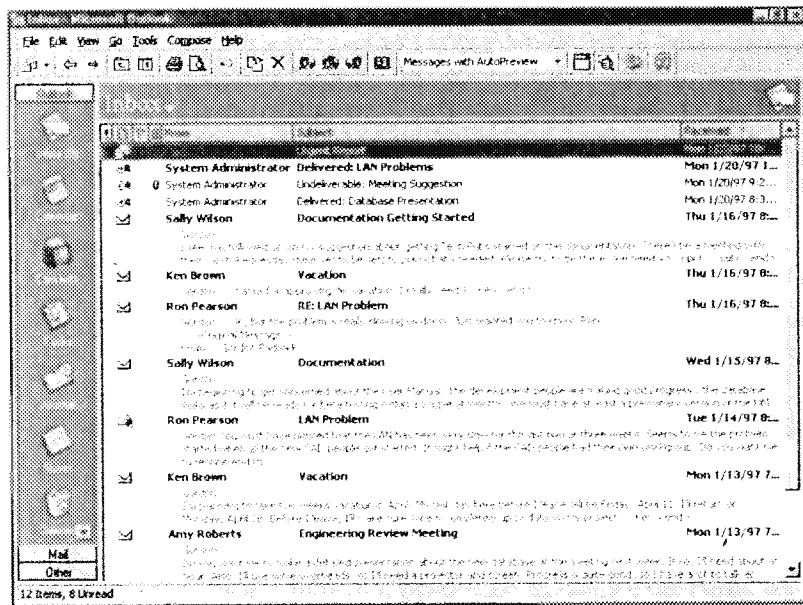
Subsequently, when you're ready to send the message, double-click it in the Information Viewer to open the Message dialog box, edit the message if necessary, and click Send to send it.

N O T E By saving messages you haven't sent in the Outbox, as described at the beginning of this section, you can subsequently send all those messages automatically. If you save individual unsent messages in the Inbox, you have to select each message separately to send it.

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To deal with a message in the Sent Items subfolder which was not actually sent due to a problem connecting to the postoffice, follow these steps:

1. Select the Mail section of the Outlook Bar and click the Sent Items shortcut in the Outlook Bar to display the Sent Items Information Viewer.

2. Click the Folder List button in the toolbar to display the folder list shown in Figure 9.13.

FIG. 9.13
Display the Sent Items Information Viewer and the folder list.
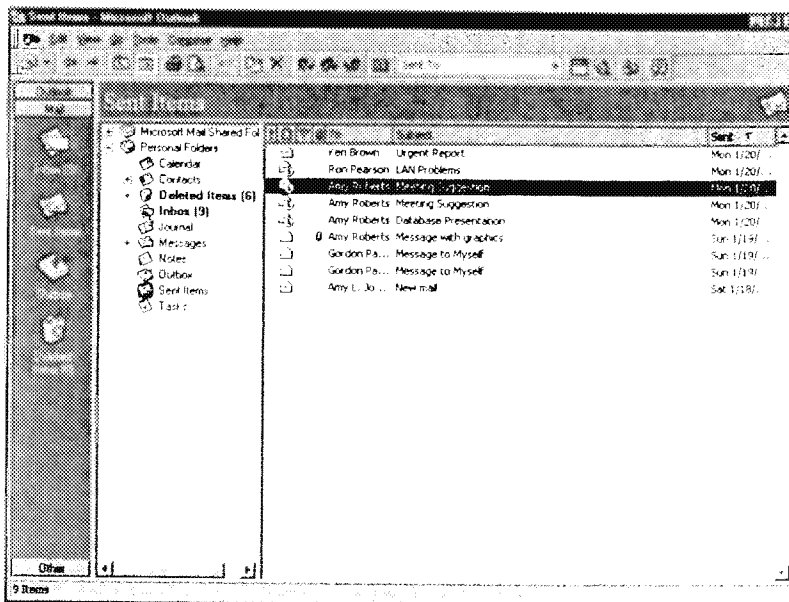
3. Drag the message you couldn't send to the postoffice from the Information Viewer to the Outbox subfolder. This action moves the message from the Inbox subfolder to the Outbox subfolder. After you've done so, the message disappears from the Information Viewer.

4. Click the Folder List button in the toolbar to hide the folder list.

5. Click the Outbox shortcut in the Outlook Bar to display the Outbox Information Viewer which now contains the message.

When you're ready to try sending the message again, double-click it in the Outbox Information Viewer to display it in the Message dialog box, and then click Send to send the message.

N O T E   You may have heard that you can specify a future date for the delivery of a message. Unfortunately, you can't do this when you're using the Windows postoffice to interchange messages within a workgroup. If you're connected to a LAN on which Exchange Server is installed, you can specify a future date for message delivery.

Sending More Sophisticated Messages

This chapter has already described all you need to know about sending and receiving straightforward text messages. As you'll learn in the remaining pages of this chapter, Outlook has many optional capabilities you can use.

N O T E   Most of the capabilities described here depend on Outlook using Rich Text Formatting (RTF) and on its compatibility with Object Linking and Embedding (OLE). Message recipients must be using Outlook or another messaging system that is compatible with RTL and OLE in order to receive more than plain text messages.

Formatting the Text

The RichEdit editor, which this chapter assumes you are using, can format the text of your message, though with not quite as much versatility as the WordMail editor. See Chapter 22 to find out about working with WordMail.

The text of your message is sent in a default font and font size. This default is set in the Sending tab of the Options dialog box, as shown in Figure 9.14. Choose Tools, Options, and select the Sending tab to display this dialog box.

FIG. 9.14
Outlook's initial default font for messages is 10-point Arial.

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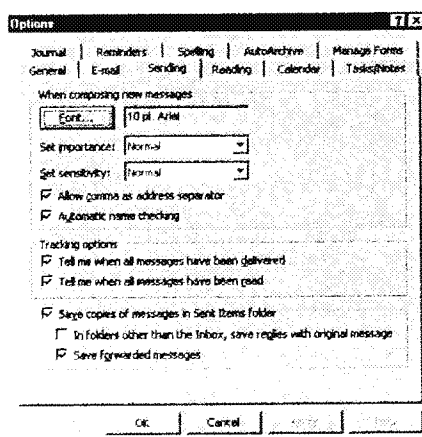
You can change the default font by choosing Font in the dialog box to display the Font dialog box shown in Figure 9.15. Use this dialog box to choose any Font available on your computer, a Font Style, and a Size. You can also choose Strikeout or Underline effects and a Color. Click OK after you've made your choices.

FIG. 9.15

Use the Font dialog box to choose a font for your message text.
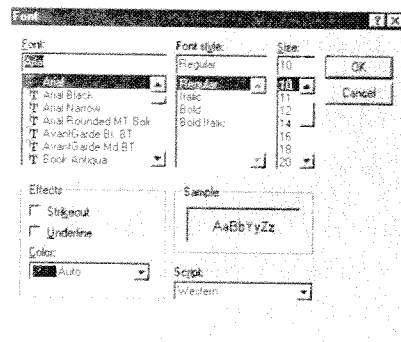
CAUTION

Although you may be able to choose among a wide variety of fonts on your computer, the people who receive your messages may not have the same fonts on their computers. If you create a message using a font that a recipient doesn't have, the recipient will see your message in a substituted font which may not provide the effect you intend. You should normally choose one of the standard fonts supplied with Windows 95 or Windows NT to be reasonably sure your recipients have those fonts.

This chapter considers only using Microsoft Mail to send messages within a workgroup. However, Outlook uses the default font you choose for messages you may send by way of other information services, such as the Internet. This is another reason why it's important to stick with basic fonts.

The default Message dialog box contains two toolbars, as shown in Figure 9.16. The upper one is the Standard toolbar; the lower one is the Formatting toolbar, which contains buttons you can use to format the text of your message. This toolbar is active only when the insertion point is inside the message box in the lower half of the dialog box.

Table 9.4 summarizes the buttons in the RichEdit editor Formatting toolbar (the buttons in the WordMail Formatting toolbar are somewhat different). To use a button to format your message text, select the text and then click the button.

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FIG. 9.16
The Message dialog box contains two toolbars, the lower one being used to format the text of your message.

Standard toolbar
Formatting toolbar
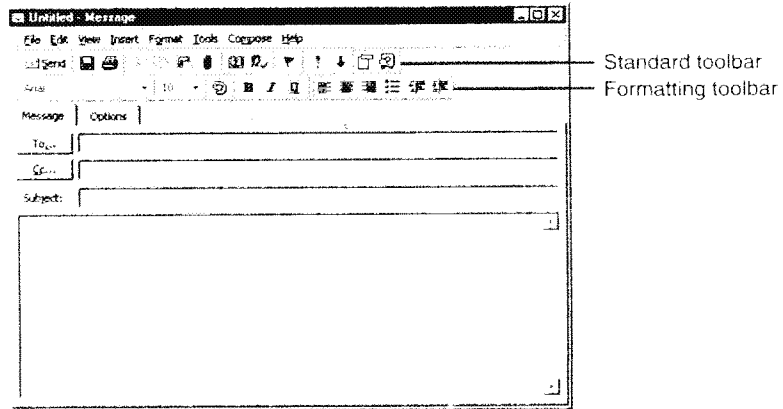
Table 9.4   RichEdit Formatting Toolbar Buttons

Button Name	Icon	Purpose
Font	Arial	Select a font from those installed on your computer
Font Size	10	Select a font size
Font Color		Select a font color
Bold	**B**	Set or cancel bold font style
Italic	*I*	Set or cancel italic font style
Underline	U	Set or cancel underline font style
Align Left		Set or cancel left alignment
Center		Set or cancel centering
Align Right		Set or cancel right alignment
Bullets		Set or cancel bulleted paragraphs

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Button Name	Icon	Purpose
Decrease Indent		Decrease paragraph left indent
Increase Indent		Increase paragraph left indent

N O T E You can also format text by choosing Format, Font to work with font formatting, or Format, Paragraph to work with paragraph formatting.

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Assigning Categories to a Message

You should make a habit of assigning categories to all the Outlook items you create; messages are no exception to this rule.

To assign one or more categories to a message, display the message in the Message dialog box, then choose Edit, Categories to display the Categories dialog box shown in Figure 9.17. Place check marks in the check boxes by the side of each category you want to assign to the message, and click OK.

FIG. 9.17

Use the Categories dialog box to assign one or more categories to a message.
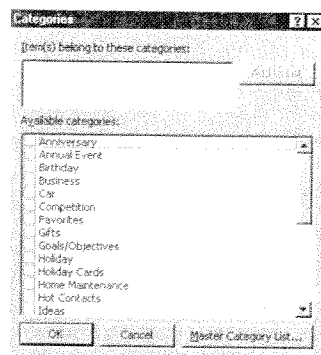
▶ **See** "Working with Categories," **p. 68**

Inserting a File or Item into a Message

You can insert any file to which you have access from your computer, and any Outlook item into a message. In general, you can insert a file or item in one of three formats:

- Text only
- Attachment
- Shortcut

However, you can't use the Text Only format for files, such as graphics files, that aren't already in text format.

N O T E   Outlook will let you use Text Only for a file that isn't in text format, but if you do, your message will be indecipherable.

When you choose Attachment, Outlook attaches the complete file or item to your message. Recipients can open that file or item and do whatever they want with it, providing they have an application that can read the file or item. If you are familiar with OLE terminology, think of an attached file or item as embedded in the message.

When you choose Shortcut, Outlook provides recipients with the location of the inserted file or item. In order to read the file or item, they not only need access to a compatible application, they also need access the original file or item: It must be in a folder that's shared.

Shortcut is particularly useful within workgroups because it's easy to share folders with workgroup members and it eliminates the need to save multiple copies of files on workgroup hard drives. However, if you do insert shortcuts into your messages, you must take care to leave the inserted files or items in their original locations. If you delete or move items, the shortcuts you send won't work.

Inserting Files   To insert a file into a message, click the Insert File button in the Message dialog box toolbar (or choose Insert, File) to display the Insert File dialog box that is shown in Figure 9.18.

FIG. 9.18

Use the Insert File dialog box to identify the file you want to insert.
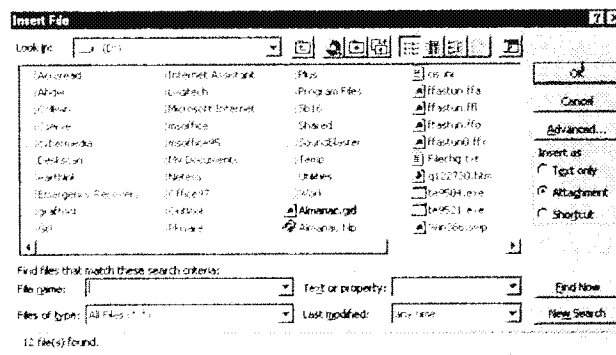
Navigate through your folder structure to find the file you want to insert, then select that file. Choose among the three types of insertion (explained previously) and then click OK. After a short delay, you see an icon representing the insertion in your message. Figure 9.19 shows a Word document inserted twice in an otherwise empty message, first as an attachment and then as a shortcut.

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FIG. 9.19
This is a message with
a Word document
inserted twice, once
as an attachment and
once as a shortcut.
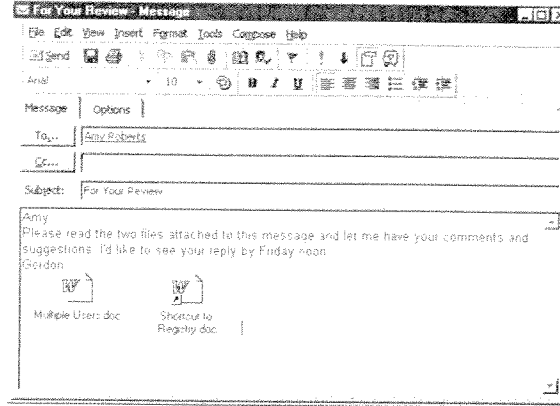
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When a recipient receives a message that contains inserted files, and then double-clicks the message to open it in the Message dialog box, the recipient will see icons, the same as those in Figure 9.19. The recipient can double-click the icons to read the inserted files, providing an application that can read the files is available on the recipient's computer.

If a recipient double-clicks an icon that represents an attached file, the application associated (in the Windows Registry) with that file opens, and then that application opens the file that was sent with your message. If, on the other hand, a recipient double-clicks a shortcut icon, the application follows the directions in the shortcut to find and open the original file.

Inserting an Outlook Item   To send an Outlook item, such as an item from your Contacts subfolder, with a message, follow these steps:

1. Display the message in the Message dialog box, then choose Insert, Item to display the Insert Item dialog box shown in Figure 9.20.

FIG. 9.20
Use the Insert Item
dialog box to choose
the type of item you
want to send.

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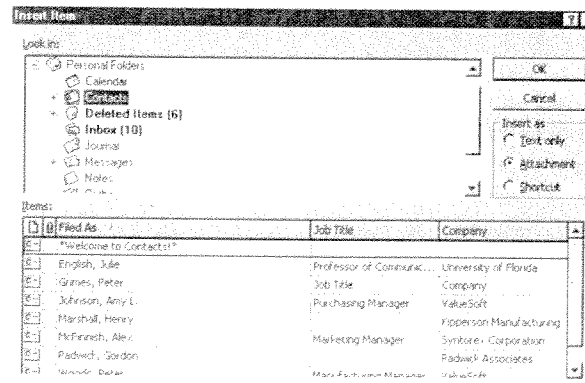
2. In the Look In list at the top of the dialog box, choose the subfolder that contains the item you want to send, Contacts in this example.

3. In the Items list at the bottom of the dialog box, choose the item (or items) you want to send.

4. In the Insert As box, choose Attachment or Shortcut, as appropriate.

5. Click OK to insert the item in your message. Your Message dialog box shows the inserted items as icons (see Figure 9.21).

FIG. 9.21
This message contains two icons, one showing an attached contact item and the other showing a shortcut to a contact item.
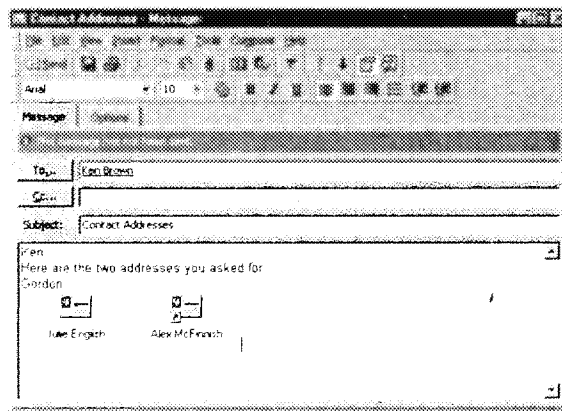
N O T E   Attached items are shown in the message as an icon with the name of the item below it. Shortcuts are shown by the same symbol with a superimposed arrow and the name of the item below it. Using an arrow to indicate a shortcut is common practice in Windows applications.

When a recipient receives a message that contains icons representing inserted Outlook items, the recipient can double-click the icons to open those items and see them in detail. Each recipient must, of course, have Outlook, Exchange Client, or Windows Messaging installed.

N O T E   Outlook can, of course, open all Outlook items. Exchange Client and Windows Messaging can only open certain Outlook items.

Inserting an OLE Object

In addition to files and Outlook items, you can insert OLE objects such as graphics and sounds into a message. You can insert an existing object or create the object from within Outlook.

Inserting an Existing Object   Suppose you want to incorporate an existing drawing you created in Visio into a message. Here's what you do:

1. Display the message in the Message dialog box, then choose Insert, Object to display the Insert Object dialog box similar to the one shown in Figure 9.22. The object types you see on your computer depend on the applications you have installed.

FIG. 9.22

The Insert Object dialog box lets you choose between creating a new object to insert, or inserting an existing object.
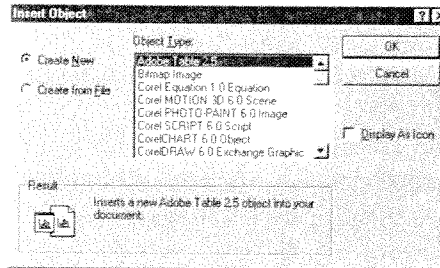
2. Choose Create From File to change the Insert Object dialog box to that shown in Figure 9.23.

FIG. 9.23

In this dialog box, select the existing object you want to insert.
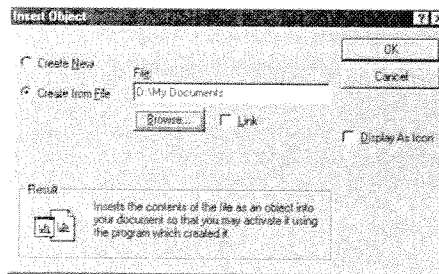
3. Choose Browse, navigate through your folder structure to find the file that contains the object you want to insert, then select the file and click OK to return to the Insert Object dialog box, which now contains the name of the file you selected.

4. Leave the two check boxes, Link and Display as Icon, unchecked and click OK. After a delay of several seconds, the Message dialog box reappears with the inserted object, or part of it, visible, as shown in Figure 9.24. Click Send to send the message.

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FIG. 9.24
The message now
contains the inserted
object.
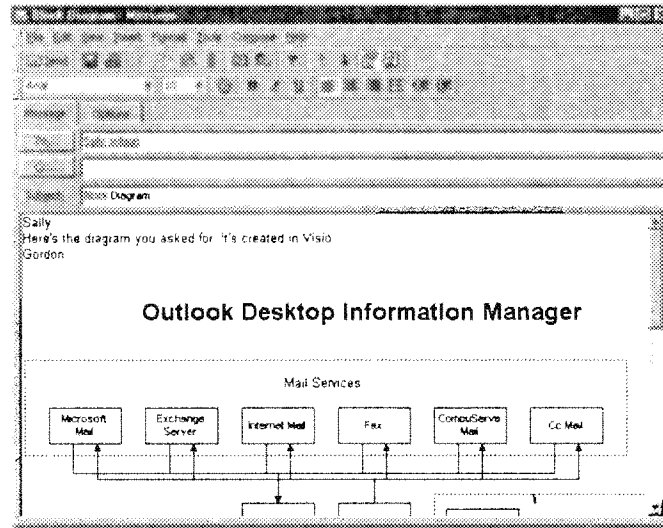
When a recipient receives the message and double-clicks it in the Inbox, the message is displayed including the inserted object. It isn't necessary for the recipient to have the application in which the object was created installed in order to see the object.

If you followed the preceding steps, you left the Link and Display as icon check boxes unchecked in the Insert Object dialog box. This resulted in a complete copy of the object file being inserted into your message, and the object being displayed in the message. You could have checked the Link check box, in which case only a shortcut to the object would be included with the message. In some circumstances, this has the benefit that the message recipient always sees the latest version of the object.

Also, you could have checked the Display as Icon check box, in which case the object would be displayed as an icon in the message. If you checked both check boxes, the object would be displayed as a shortcut icon, as shown in Figure 9.25.

N O T E When you send an object as an icon, a recipient can double-click the icon to see the entire object, but only if that recipient has an application installed that can open the object.

Creating a New Object to Insert Instead of inserting a drawing that already exists, suppose you want to create a new Visio drawing to insert into a message. Here's what you do:

1. Display the message in the Message dialog box, then choose Insert, Object to display the Insert Object dialog box (refer to Figure 9.22).

2. Choose Create New, choose the application (such as Visio) in which you want to create the new object from the Object Type list, and click OK to open the application.

FIG. 9.25
This message contains a shortcut to a Visio drawing.
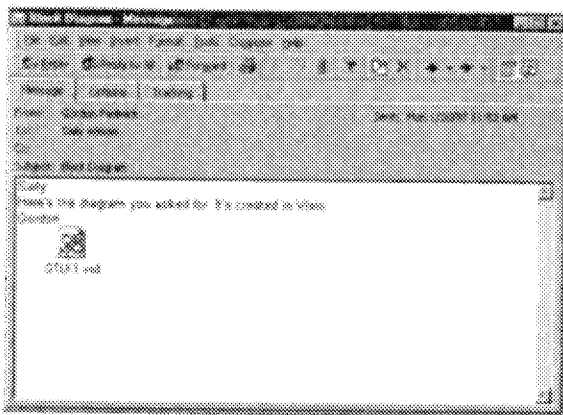
You can now use the application—Visio in this case—to create the object within a pane inside the message text box. The details of creating the object depend, of course, on which application you are using. When you've finished creating the object, click outside the pane in which you created the object to close the application, leaving the object in the message text box. Now you can send the message.

When a recipient receives the message and double-clicks it in the Inbox, the message is displayed including the inserted object. It isn't necessary for the recipient to have the application in which the object was created installed in order to see the object. It is necessary, though, for the recipient to have the application (or another compatible application) in which the object was created installed in order to make changes to the object.

Automatically Inserting Your Signature

An AutoSignature is some text you add automatically or manually at the bottom of mail messages you create. Usually an AutoSignature consists of your name and, possibly, your job title and phone number. However, it can contain whatever text you like.

Creating an AutoSignature   To create an AutoSignature, choose Tools, AutoSignature to open the AutoSignature dialog box shown in Figure 9.26.

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FIG. 9.26
Use the AutoSignature
dialog box to create
and format your
AutoSignature.
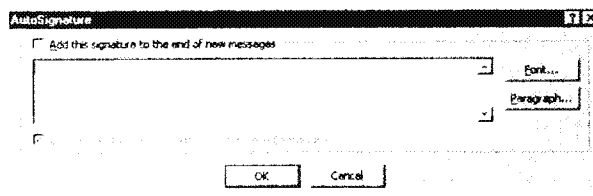
Type whatever text you like in the large text box. After you've done so, you can format the text by selecting characters and clicking the Font button to open the Font dialog box. You can also select one or more paragraphs and then click the Paragraph button to select Left, Center, or Right alignment for those paragraphs.

If you want Outlook to add the AutoSignature automatically at the end of all the messages you create, click the Add this Signature to the End of New Messages check box at the top of the dialog box. After you place a check mark in this check box, the check box labeled Don't Add this Signature to Replies or Forwarded Messages becomes enabled with a check mark inserted. If you do want to add your AutoSignature when you reply to or forward, messages, remove the check mark.

Click OK to save the AutoSignature.

Inserting an AutoSignature   If you have chosen to add your AutoSignature to messages automatically, the AutoSignature appears each time you open the Message dialog box. All you have to do is type your message above the AutoSignature. If you don't want the AutoSignature to appear in certain messages, just delete it.

If you haven't chosen to add the AutoSignature automatically at the end of the messages you create, you can add it manually. To do so, place the insertion point at the end of a message and choose Insert, AutoSignature. You'll immediately see the AutoSignature at the bottom of your message.

Setting the Importance and Sensitivity of a Message

You can mark the importance of messages you send as high, normal, or low, and you can mark the sensitivity as normal, personal, private, or confidential. By default, all messages you create are set to normal importance and normal sensitivity. You can change the importance and sensitivity defaults in the Sending tab of the Options dialog box (refer to Figure 9.14).

Setting the Message Importance   The Message dialog box toolbar contains two buttons, High Importance and Low Importance, which are initially shown in the off state (unless you have changed the defaults in the Sending tab of the Options dialog box), meaning that the message has normal importance. You can click either of these buttons to

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give your message high or low importance status. The only indication you see is that the last of these buttons you clicked remains pressed.

An alternative way to set the importance of a message is to follow these steps:

1. If the Message header isn't shown in the Message dialog box, click the Message Header button in the toolbar. After you do so, you'll see the Message dialog box with two tabs: Message and Options.

2. Click the Options tab to show the Message dialog box shown in Figure 9.27.

FIG. 9.27

Use the Options tab of the Message dialog box to set the importance and sensitivity of a message.
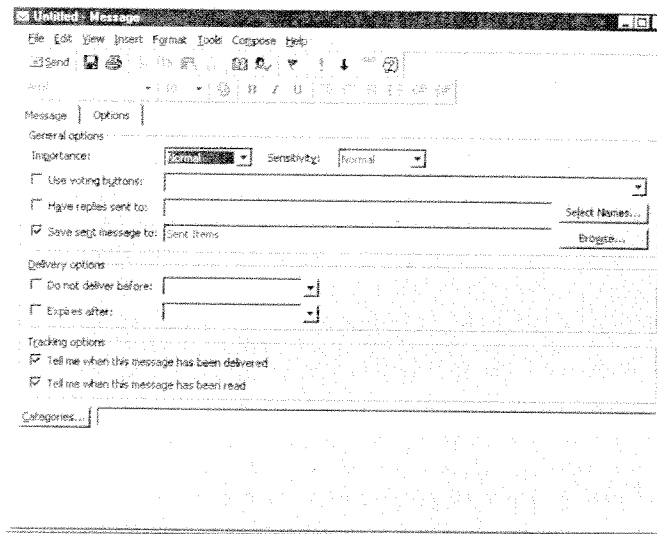
3. Open the Importance list and choose Low, Normal, or High. Notice that the Importance buttons in the toolbar change to match the importance setting you've chosen.

4. Choose the Message tab to continue creating your message.

When a message arrives in a recipient's Inbox and is displayed in the Inbox Information Viewer with the Messages view selected, the left column is normally blank, indicating that the message is of normal importance. If the message sender set High Importance, this column contains a red exclamation mark; if the message sender set low importance, this column contains a down-pointing arrow. These symbols are the same as those on the corresponding buttons in the Message dialog box toolbar.

A person who receives a message is free to change the message importance. This is because a recipient may regard the message as highly important (and want to mark it so) even though the sender chose normal importance.

If you want to change the importance of a message you've received, follow these steps:

1. Double-click the message displayed in the Inbox Information Viewer to display the message in the Message dialog box. A notice at the top of the message contains text stating the importance of the message if it is other than normal. You cannot directly change the content of this notice.

2. If the message dialog box doesn't include the message header, click the Message Header button in the toolbar. You should now see the Message dialog box with two tabs: Message and Options. Choose the Options tab to display a Message dialog box similar to that previously shown in Figure 9.27. The Importance box shows Low, Normal, or High according to the importance of the message you're looking at.

3. Open the Importance list and choose Low, Normal, or High to give the message the appropriate importance.

4. Choose File, Save (or press Ctrl+S) to save the change, then close the Message dialog box to return to the Inbox Information Viewer. The left column now shows the Importance setting you chose.

Setting the Message Sensitivity   You can set the sensitivity of a message you create to Normal, Personal, Private, or Confidential. Setting Sensitivity is similar to setting Importance, but there are two significant differences:

■ There are no toolbar buttons for setting sensitivity. You have to choose from the Sensitivity list in the Options tab of the Message dialog box shown previously in Figure 9.27.

■ A recipient cannot change the sensitivity of a message.

When a recipient receives a message that has other than normal sensitivity and double-clicks the message to display it in the Message dialog box, a notice at the top of the message indicates the sensitivity level. For example, if the message is confidential, the notice says `Please treat this as Confidential.`

Flagging a Message

When you create a message, you can flag it to draw a recipient's attention to the nature of the message. You can only attach a single flag to a message. When you receive a message, you can add a flag to it, or change the existing flag.

Sending a Flagged Message   To attach a flag to a message, click the Message Flag button in the Message dialog box's toolbar to display the Flag Message dialog box shown in Figure 9.28.

FIG. 9.28
Use the Flag Message
dialog box to choose
a flag.
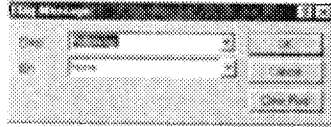
You can open the Flag list and choose among the following flags:

- Call
- Do not Forward
- Follow up
- For Your Information
- Forward
- No Response Necessary
- Read
- Reply
- Reply to All
- Review

You can also set a date as part of the flag. The date indicates when the action indicated by the flag should be completed. By default, the date is set to None. To set a date, open the By list to display the current month's calendar. If necessary, use the arrows in the calendar title bar to change to a different month, then click the date you want to attach to the flag. The chosen date appears in the By box together with a time. You can change the time if you need to.

N O T E   The time that appears in the By box is the Calendar working hours End Time, as set in the Calendar tab of the Options dialog box.

Instead of choosing from a calendar, you can type a date and time in the By box. As explained in "Typing Dates and Times" in Chapter 3, you can use words and phrases to set the date and time.

After you've chosen the flag, click OK in the Flag Message dialog box to return to the Message dialog box that now contains a description of the flag in a notice immediately above the recipient's name.

Receiving a Flagged Message   When recipients receive a flagged message, they see one of the flag symbols in the third column of the Inbox Information Viewer (with the Messages view selected). On double-clicking the message to see it in the message dialog box, recipients see a notice at the top of the message stating the details of the flag, as shown in Figure 9.29.

FIG. 9.29
The notice at the top of this message provides details of the flag, the sensitivity level, and the importance level.
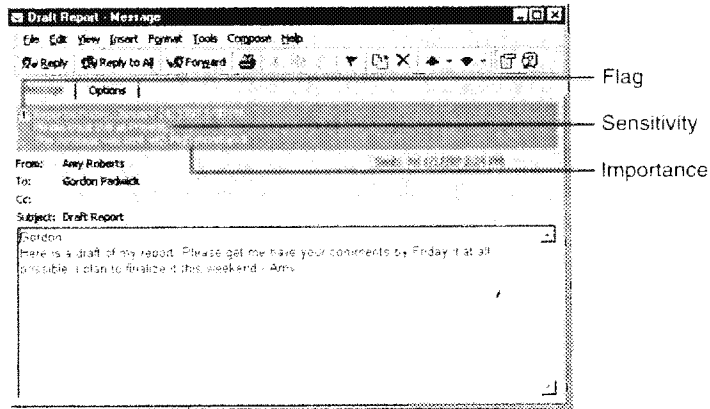
When a recipient reads a message, flagged or not, that recipient can click the Message Flag button in the Message dialog box toolbar to open the Flag Message dialog box shown in Figure 9.30. When you receive a message, you sometimes need to add a flag to it to remind yourself to take some action by a specific date. Also, you might want to add a flag to a message before you forward it to someone else.

FIG. 9.30
The Flag Message dialog box that recipients see is slightly different from the one the sender uses. This dialog box contains the Completed check box.
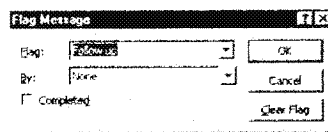
This dialog box contains details of the flag, if any, the sender attached to the message. If appropriate, the recipient can change the type of flag and the By date supplied by the sender, or add a flag if the sender omitted to do so.

Many messages require some action on the part of the recipient. When the action is complete, the recipient can click the Completed check box to place a check mark in it. After clicking OK to close the dialog box, the notice at the top of the message in the Message dialog box includes a completion notice such as Completed on Saturday, November 30, 1996 10:44 AM. The date and time are those current when the recipient checked the Completed check box.

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Using Voting Buttons

Sometimes you want to send a message that includes a question to which you want the user to choose from a limited set of answers, such as Yes or No; or Red, Green, or Blue. You can do this conveniently by including voting buttons in your message.

Sending a Message with Voting Buttons   To include voting buttons in a message, use the Message dialog box to start creating a message as you normally do. If necessary, click the Message Header button in the toolbar to display the message header and the Message and Options tabs. Select the Options tab (refer to Figure 9.27).

In the Options tab, click the Use Voting Buttons check box to place a check mark in it. Then open the list at the right of that check box to show a list of three available sets of voting buttons, and choose one of the sets, such as Yes; No.

N O T E   As you'll see soon, you are not limited to the sets of voting buttons provided in Outlook. You can name your own voting buttons.

After choosing a set of voting buttons, click Send to send your message.

If you need a set of voting buttons that Outlook doesn't provide, you can create your own. To do so, open the Options tab of the Message dialog box and check the Use Voting But-tons check box. Now, instead of choosing from a list of button names, you can delete the names in the text box at the right of the check box and supply your own, separating one name from the next with a semicolon. For example, if you are ordering T-shirts for your crew, you might create voting buttons named Small; Medium; Large; Extra Large; Enor-mous, as shown in Figure 9.31.

FIG. 9.31
You can name your own set of voting buttons.

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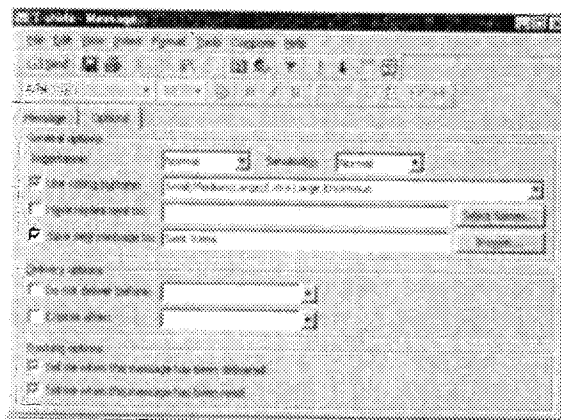
Replying to a Message with Voting Buttons   When you receive a message that includes voting buttons and you double-click the message to see it in the Message dialog box, the voting buttons appear just under the toolbar, as shown in Figure 9.32.

FIG. 9.32
Voting buttons in a message you receive are under the toolbar.
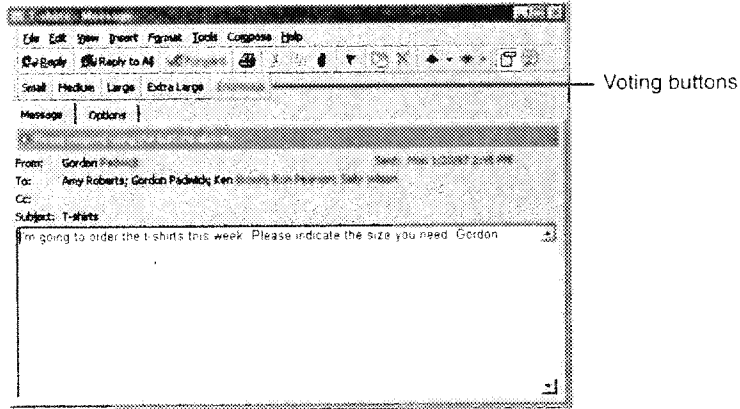
Voting buttons

Click the appropriate voting button, and you see the dialog box shown in Figure 9.33.

FIG. 9.33
This dialog box appears after you choose a voting button.
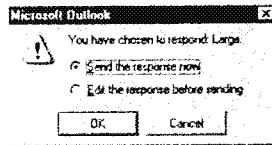
By default, Send the Response Now is selected, so click OK to send your reply. After Outlook sends your reply, a notice appears at the top of the message to confirm the choice you made and the date and time you sent the response. This notice stays with the message in your Inbox.

Viewing Vote Responses   When you receive a reply from a person who responded to your voting buttons and double-click that reply to see it in the Message dialog box, you see a notice at the top of the message indicating the person's response, as shown in Figure 9.34.

You can also view the combined responses from all the people to whom you sent the message with voting buttons. To do so, in the Outlook Bar select the subfolder that contains the original message you sent (this is usually the Sent Items subfolder). Double-click the original message to display it in the Message dialog box which has three tabs: Message, Options, and Tracking. Choose the Tracking tab shown in Figure 9.35.

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FIG. 9.34
The reply from a person who voted shows that person's choice.
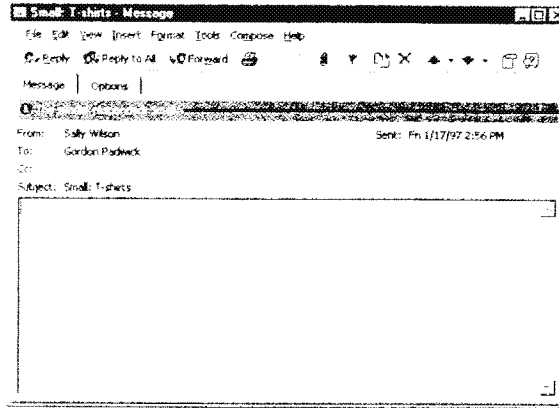
— Voting response

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FIG. 9.35
The Tracking tab of the Message dialog box contains a list of all the replies received from people who responded to your voting buttons.
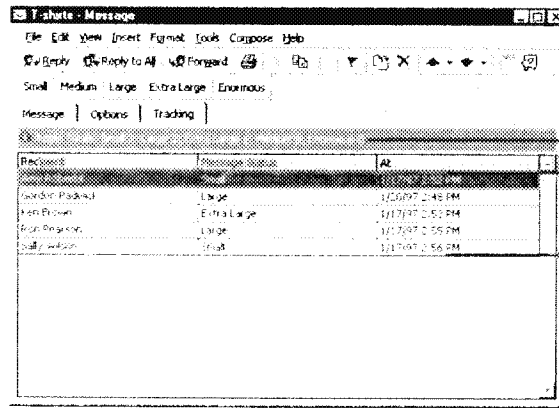
— Response summary

— Individual responses

As you see, you now have a convenient list of responses, together with a summary of the choices everyone made.

You can, if you like, select any or all of the responses listed, then choose Edit, Copy (or press Ctrl+C) to copy the responses to the Clipboard. Then you can paste from the Clipboard into another application or into a text box in another Outlook Item. For example, you might want to use the voting results as text in a message you're sending to someone else.

Saving Mail Items

By default, Outlook saves messages you send in the Sent Items subfolder. For this to happen, the Save Copies of Messages in Sent Items Folder check box in the Sending tab of the Options dialog box must be checked (refer to Figure 9.14). If you don't want to save copies of messages you send, remove the check mark from this check box.

Outlook saves messages you receive, including those that are replies to messages you send, in your Inbox subfolder. You might consider it more convenient to save replies you receive in the Sent Items subfolder with the original message you sent. To do so, place a check mark in the In Folders Other than the Inbox, Save Replies with the Original Message check box in the Sending tab of the Options dialog box. You must have enabled saving sent messages in order to do so. When you reply to messages you receive, Outlook saves your reply in the currently open subfolder, normally the Inbox subfolder.

When you forward a message, Outlook normally treats the message as a message you send and saves the forwarded message in the Sent Items subfolder. For this to occur, the Save Forwarded Messages check box in the Sending tab of the Options dialog box must be checked.

You may have created your own subfolders to use for saving messages. If this is the case, you can move messages from the default subfolders, such as the Sent Items subfolder, into the subfolders you created. Follow these steps to do so:

1. Click the Sent Items shortcut in the Mail section of the Outlook Bar to display the Sent Items Information Viewer.

2. Click the Folder List button in the toolbar to display the folder list. If necessary, expand the folder list to show the names of the subfolders into which you want to move sent items. Your screen should now look similar to the one in Figure 9.36.

FIG. 9.36
You can move sent items from the Sent Items Information Viewer to a specific subfolder.
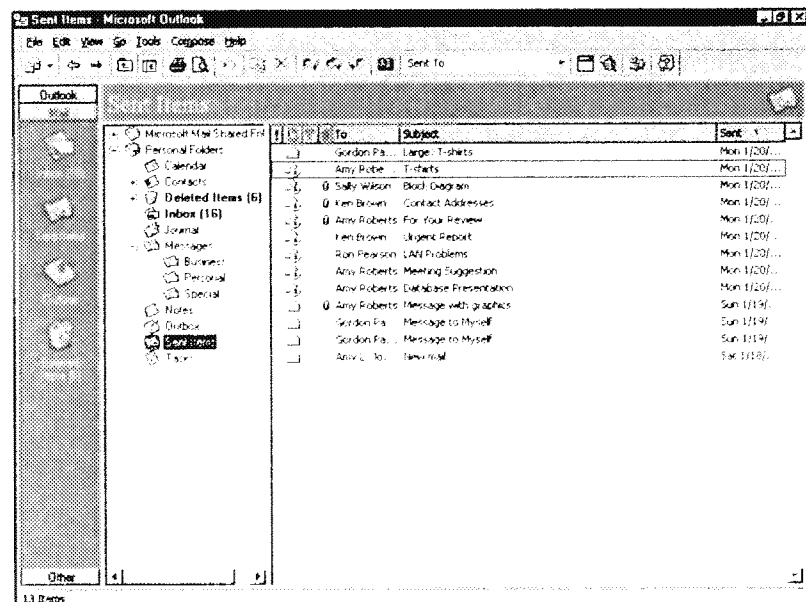
3. Select one or more items in the Sent Items Information Viewer, then drag those items onto the name of the appropriate subfolder in the folder list.

N O T E You select an individual item by clicking it. After you have selected one item, you can select additional items by holding down Ctrl while you click those items. You can select consecutive items by selecting the first, then holding down Shift while you click the last.

Setting Tracking Options

You can ask Outlook to provide confirmation when messages you send arrive at the recipients' postoffices and when recipients open your messages. (You have to assume that recipients actually read your messages when they open them!)

To set these tracking options, choose Tools, Options to open the Options dialog box, and choose the Sending tab (refer to Figure 9.14). This tab contains two tracking options check boxes:

- *Tell Me When All Messages Have Been Delivered.* Place a check mark in this check box to receive confirmation when the messages you send are satisfactorily received by the postoffice.

- *Tell Me When All Messages Have Been Read.* Place a check mark in this check box to receive confirmation when recipients open the messages you send.

N O T E Outlook's capability to confirm that a recipient has opened a message depends on the capability of the recipient's messaging application to send a message back to you by way of the postoffice. Outlook, Exchange Client, and Windows Messaging all have this capability, so you can receive confirmation from recipients who use these messaging applications.

After setting these options and then sending messages, the confirmation messages you receive are displayed in your Inbox Information Viewer (see Figure 9.37). Confirmation messages from the postoffice are listed as from System Administrator; messages confirming that a recipient has opened your messages are listed as from the recipient.

You can also see confirmation messages by selecting Sent Items and double-clicking the original message to see it in the Message dialog box. To do so, you must place a check mark in the Process Delivery, Read, and Recall Receipts on Arrival check box in the E-mail tab of the Options dialog box (refer to Figure 8.1 in Chapter 8). You must set this option before sending the message for which you want to see confirmation messages.

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FIG. 9.37

Messages in the Inbox Information Viewer confirm that mail has been delivered to the postoffice and read by recipients.
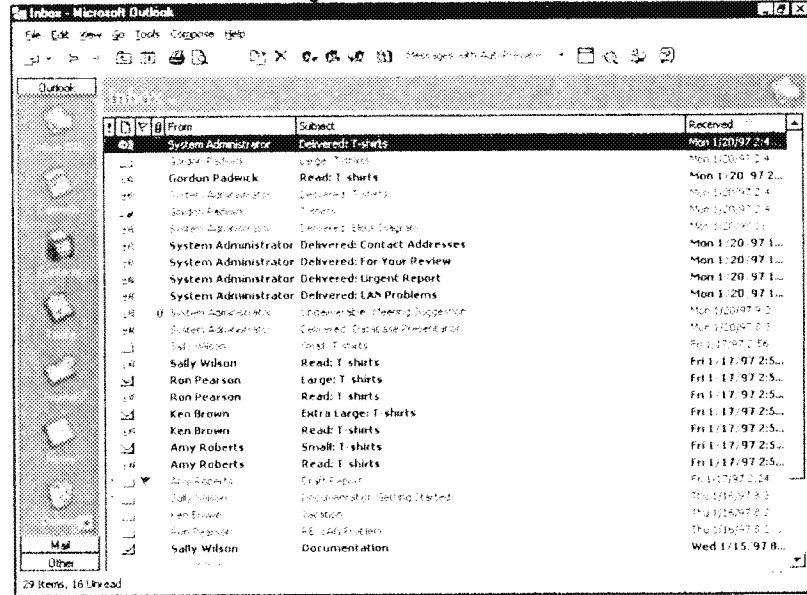
After choosing this option and then sending a message, choose the Tracking tab in this dialog box to see a summary of confirmation messages, as shown in Figure 9.38. This method of reviewing confirmation messages is particularly useful after you've sent a message to many recipients and you want to know which of them have received it.

FIG. 9.38

The Tracking tab of the Message dialog box, opened from the Sent Items subfolder, shows which recipients have received your message.

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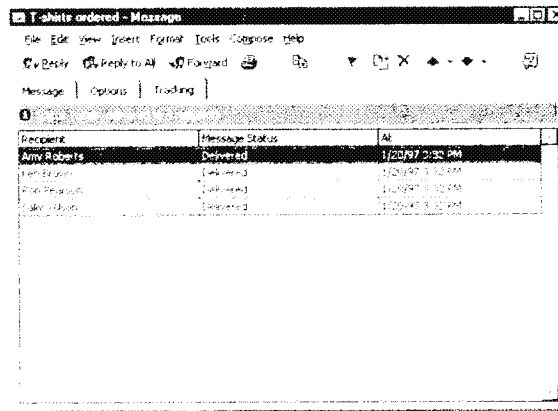
Replying to and Forwarding Messages

After you receive a message, you can reply to it and you can forward it to someone else. Outlook normally sends a copy of the original message with your reply. You can add remarks (annotations) to the original message you are replying to or forwarding.

Replying to a Message

To reply to a message, double-click the message in the Inbox Information Viewer to display it in the Message dialog box. The Toolbox in this dialog box contains buttons you can click:

- *Reply.* Creates a reply and sends it to the person who sent the message.
- *Reply to All.* Creates a reply and sends it to the person who sent the message and to people to whom copies of the message were sent (those in the Cc list but not those in the Bcc list).
- *Forward.* Forwards the original message to another person.

When you choose Reply, Outlook displays a new Message dialog box in which there is a copy of the original message, and the To box contains the name of the person who sent the message to which you are replying, as shown in Figure 9.39. All you have to do is type your reply (which appears in blue on your screen), and then click Send. You can add annotations to the original message if you want to, as described in "Annotating a Message" later in this chapter.

FIG. 9.39

After you choose Reply, Outlook creates a Message dialog box that contains the original message.

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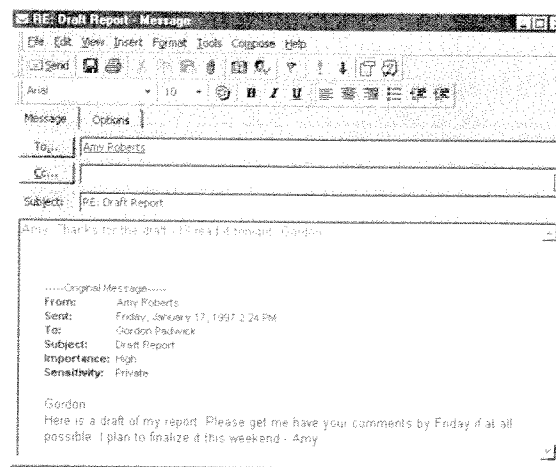
When you choose Reply to All, Outlook displays a similar Message dialog box, except this time the Cc box contains the names of the people who received copies (but not those who received blind copies) of the original message.

Whether you choose Reply or Reply to All, you can click To to display the Select Names dialog box in which you can add and delete names in the To, Cc, and Bcc lists.

The preceding description of replying to a message is based on the assumption that you haven't changed Outlook's defaults. To change the defaults, choose Tools, Options, and select the Reading tab in the Options dialog box.

To choose options for replying to messages, open the list in the When Replying to a Message section of the Reading tab of the Options dialog box shown in Figure 9.40.

FIG. 9.40

The Reading tab of the Options dialog box is where you choose how Outlook replies to, and forwards, messages.
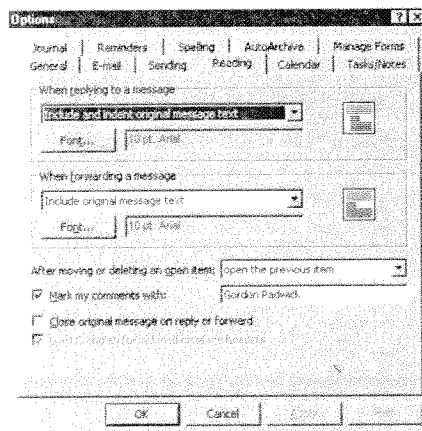
You can choose among these options:

- Do Not Include Original Message
- Attach Original Message
- Include Original Message Text
- Include and Indent Original Message Text

This last option is the default.

You can also choose a font to use for your reply to the message. By default, Outlook uses the same font (10-point Arial) for the reply as the default font for original messages, but uses the color blue. You can choose Font to open the Font dialog box in which you can choose a different font and color for the text of your reply.

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Forwarding a Message

When you choose Forward, Outlook creates a Message dialog box similar to that shown in Figure 9.39, but without any recipient names. Click To to open the Select Names dialog box in which you provide recipient names. After you've done so, click OK to close the dialog box, add annotations to accompany the forwarded message as described in "Annotating a Message," and click Send to forward the message.

The preceding description of forwarding a message is based on the assumption that you haven't changed Outlook's defaults. To change the defaults choose Tools, Options, and select the Reading tab in the Options dialog box shown previously in Figure 9.40.

To choose options to use when forwarding messages, open the list in the When Forwarding a Message section of the dialog box and choose among these options:

Attach Original Message
Include Original Message Text
This option is the default.
Include and Indent Original Message Text

You can also choose a font to use for any comments you add to the message you're forwarding. By default, Outlook uses the same font (10-point Arial) for the reply as the default font for original messages, but uses the color blue. You can choose Font to open the Font dialog box in which you can choose a different font and color for any text you want to send with the forwarded message.

Annotating a Message

When you reply to a message you've received, Outlook normally sends a copy of the original message with your reply (although, as already explained, you can choose not to include the original message). You can, if you like, add annotations to the original message. You can also add annotations to a message you forward.

N O T E The method of annotating a message described here applies only when you are using RichEdit as your e-mail editor. If you use WordMail as your editor, annotations are marked by Word's revision marks, as explained in Chapter 22.

To prepare to annotate messages, choose Tools, Options to open the Options dialog box and choose the Reading tab shown previously in Figure 9.40. Place a check mark in the Mark My Comments With check box and, in the adjoining text box, enter text, such as your initials or name, by which you want to identify your annotations. Choose OK to close the Options dialog box.

Now you're ready to annotate a message. In the Inbox Information Viewer, double-click a message you've received to open that message in the Message dialog box. Choose Reply, Reply to All, or Forward to show the original message in the large text box at the bottom of the dialog box. Move the insertion point to the place within the original text where you want to add an annotation, then type the annotation. The text you type is displayed together with the initials or name you provided to identify your annotations.

Outlook uses the font and color you selected to use when replying to a message if you are adding annotations to the original text of a message you are replying to; it uses the font and color you selected to use when forwarding a message if you are adding annotations to a message you are preparing to forward. These fonts and colors are set in the Reading tab of the Options dialog box.

Figure 9.41 shows a typical message with an annotation added to it.

FIG. 9.41
This is a message to which an annotation has been added.
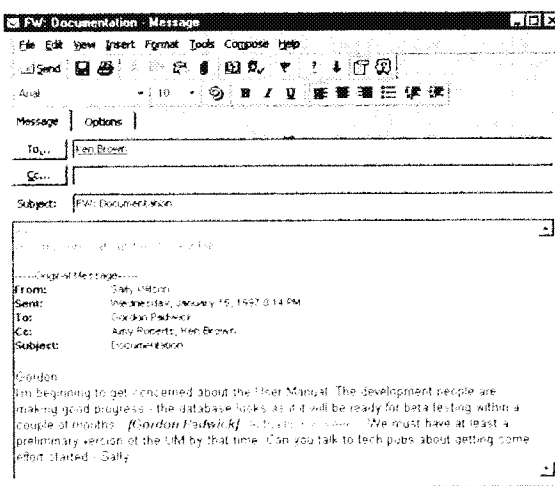
Having Replies Sent to a Different Person

There are times when you send a message and you know you won't be around to receive replies. Rather than let replies languish in your mailbox until you return, you may want replies to be addressed to a colleague. Of course, you could include a note asking recipients to reply to someone else, but there's an easier way.

Create the message in the Message dialog box as you normally would. If necessary, click the Message Header button in the toolbar to display the dialog box with the Message and Options tabs showing. Choose the Options tab.

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In the Options tab, place a check mark in the Have Replies Sent To check box, then click Select Names to open the Have Replies Sent To box shown in Figure 9.42. Use this box to choose the name of the person to whom replies should be sent, click Reply To, and then click OK. The name you choose appears in the text box adjacent to the Have Replies Sent To check box.

FIG. 9.42

Use the Have Replies Sent To box to choose the name of the person who should receive replies to your message.
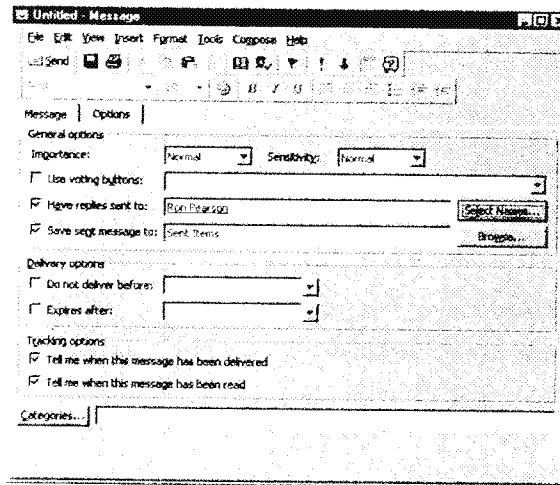
You can now send your message. After people receive the message, any replies they send will be directed to the person you chose instead of to you.

N O T E   If you change your mind about having replies sent to someone else, remove the check mark from the Have Replies Sent To check box.

Recalling a Message

Have you ever sent a message, and then wished you hadn't? If this happens, Outlook may be able to help you.

If you send a message, Outlook lets you recall it, but only under these conditions:

- The recipient must be logged onto the workgroup, and must have Outlook running.
- The recipient must not have already read the message or moved it out of the Inbox.

Subject to these conditions, follow these steps to recall a message:

1. Click the Sent Items shortcut in the Outlook Bar to display the Sent Items Information Viewer.

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2. Double-click the message you want to recall to open it in the Message dialog box.

3. In the Message dialog box, choose Tools, Recall this Message to display the Recall This Message dialog box shown in Figure 9.43.

FIG. 9.43

Use the Recall This Message dialog box to recall or replace a message you've sent.
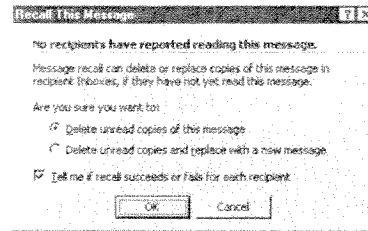
4. To recall the message, choose Delete Unread Copies of this Message.

5. Verify there's a check mark in the Tell Me if Recall Succeeds or Fails for Each Recipient check box.

6. Click OK to return to the Message dialog box which contains a notice that confirms your attempt to recall the message.

7. Choose File, Save (or press Ctrl+S) to save the message and then close the dialog box.

Your Inbox Information Viewer should contain a message telling you whether the recall was successful or not.

In step 3, you could choose Delete Unread Copies and Replace with a New Message. If you do so, a Message dialog box appears with your original message displayed. You can change the original message and send it. If recall is possible, Outlook replaces the previous message with the revised version. As before, a message in your Inbox Information Viewer tells you whether or not the message was replaced.

Viewing Messages

You can view messages you've received in the Inbox Information Viewer, and messages you've sent in the Sent Items Information Viewer. Outlook has several standard views for each of these.

The standard Inbox and Sent Item views are listed in Table 9.5.

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Table 9.5   Standard Inbox and Sent Items Views

View	Displays
Messages	All messages in a list.
Messages with AutoPreview	All messages in a list with the first three lines of text.
By Message Flag	All messages in a list grouped by message flag. Includes due date for follow-up action.
Last Seven Days	All messages received during the last seven days, in a list.
Flagged for Next Seven Days	All messages flag for follow-up action within the next seven days.
By Conversation Topic	All messages in a list grouped by subject.
By Sender	All messages in a list grouped by sender.
Unread Messages	All messages marked as unread, in a list.
Sent To	All messages in a list grouped by recipient.
Message Timeline	All messages shown chronologically in a timeline.

Previous chapters contain detailed information about working with views. Refer to those chapters for information about how you can modify standard views and create custom views.

Printing Messages

As is the case for other types of items, you can print information from list views, but not from timeline views.

To print messages, display the view that contains the information you want to print, select the items you want to print, then choose File, Print to display the Print dialog box shown in Figure 9.44.

Choose the options you want in the Print dialog box, then click OK to send your messages to the printer.

FIG. 9.44
Use the Print dialog
box to choose how
you want to print
messages.
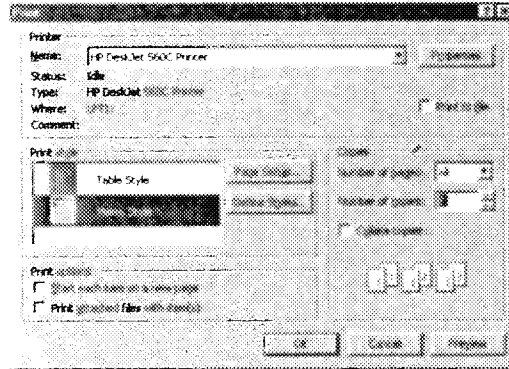
N O T E   Since this chapter was completed, Microsoft has released some exciting additions to
Outlook: the Rules wizard add-on and several groupware applications. You can
download these additions from the Microsoft Web site at **http://www.microsoft.com/outlook/**.

The Rules wizard provides an easy way for you to tell Outlook how to handle your incoming and
outgoing e-mail. For example, you can tell Outlook to automatically place all e-mail from a certain
source into a specific folder.

To add the Rules wizard to Outlook, download the file RULESWIZ.EXE. Run the file to install it as
part of Outlook. After you've done so, open Outlook Help, choose the Index tab, and look for the
Rules topic; you'll see a long list of subtopics that explain how to use the Rules wizard. When you
have the Inbox Information Viewer displayed, you can choose Tools, Rules Wizard to start working
with the Rules wizard.

The 14 sample applications provide ready-to-use automation for common business processes
such as sharing a corporate calendar, processing expense reports, tracking employment
applications, and managing projects. You can use each of these applications as they are, or
customize them to suit your specific needs. Also, by studying these applications, you can gain
valuable hints about creating your own Outlook applications.

From Here...

This chapter has described most of what you need to know about interchanging e-mail
messages with members of your workgroup. The entire chapter is based on using
RichEdit as your e-mail editor.

◦ Chapter 20, "Sending and Receiving Internet E-mail," describes how to send and
receive messages by way of the Internet.

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Chapter 22, "Sending and Receiving E-mail from Other Services," introduces you
to using WordMail as your e-mail editor and describes how to send and receive
messages by way of such information services as CompuServe. It also covers
working with cc:Mail, Lotus Notes, and Exchange Server.

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Working with Profiles

by Sharon Podlin

Profiles are not absolutely required by Outlook but do extend Outlook beyond being a desktop management tool. Without a correctly configured profile, you cannot use your Inbox. You also cannot use the group scheduling features of Outlook. This chapter discusses how to work with profiles and covers setting up the Mail service as part of a profile. ■

Understanding profiles and information services

Profiles are the doors to messaging and information services. If you want to gain access to a service, you must include that service in the profile you use.

Exploring your current profile and creating and modifying profiles

The Mail and Fax icon found in the Control Panel enables you to work with profiles. It lets you examine your current profile, as well as create new profiles.

Understanding Profiles and Information Services

A *profile* is a file stored on a workstation that contains configuration information about messaging services and information service providers. When you use one of these services, you must have a profile that provides information about that service. Types of things stored in a profile include:

Fax settings

Location of incoming mail

Name and location of address books

A listing of services supported by the profile

Internet access settings

Location of folders

A user might have more than one profile file, and users can choose which of these profiles to use for their session. They can also choose to make a particular profile the default profile. This means the profile is automatically used whenever the user starts a session and whenever the user is not prompted for which profile to use.

N O T E If you share a computer with someone else, each of you must have a profile.

When a profile is created, you assign it a name. Profile names can be up to 64 alphanumeric characters in length. Profile names can include accent characters, the underscore, and embedded spaces. They cannot include leading or trailing spaces.

The contents of a profile are determined by the message and information services. Some common profile entries include the name of each message service or service provider supported by the profile and the name of the DLLs that contain service providers and message services.

Understanding How Outlook Uses Profiles

Outlook is integrated with the messaging and groupware capabilities of Exchange Server. This does not mean that Outlook requires Exchange Server. It is designed to work as a stand-alone product if needed, though this does not give you the full functionality of the product. It can also be an e-mail client for the Internet and a variety of messaging services. It works as an e-mail client for any e-mail system that supports MAPI, including Microsoft Mail, Microsoft Exchange Server, The Microsoft Network (MSN), CompuServe, and Lotus cc:Mail.

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N O T E   You are not limited to the previously mentioned e-mail systems. Additional third-party MAPI drivers are either available or currently in development for America Online, Digital's ALL-IN-1, Hewlett-Packard OpenMail, Lotus Notes, and Novell GroupWise.

Using Outlook Configurations

When setting up Outlook, there are several possible configurations. The following list discusses these configurations and how they affect the functionality of Outlook:

No Messaging Service. If there are no messaging services, Outlook acts as a stand-alone desktop information manager and document explorer. In this mode, the user cannot send or receive e-mail, but can use the other desktop information management features in Outlook such as Calendar, Tasks, and so on.

When there is no messaging service, only a driver for a personal store (.PST) file that contains the user's personal Outlook folders and modules is installed. This driver is part of the Windows Messaging System included with Outlook.

Exchange Server. All of Outlook's features are available when the Exchange Server driver is installed. This driver supports the server-based message store (the personal message store is still supported as well), message transport, and global address book.

When using the Exchange Server configuration, Outlook offers all the desktop information management features such as Calendar and Journal, plus advanced e-mail functionality and group scheduling.

The Exchange Server driver is included with Outlook, but users must have an Exchange Server client-access license.

LAN or Post Office E-Mail Systems. Unlike Exchange Server, LAN and postoffice e-mail systems such as Microsoft Mail and Lotus cc:Mail do not support server-based message stores. When using a LAN or postoffice e-mail system, the user's messages are stored locally in a .PST file. The user still works connected to the LAN and to a postoffice. The role of the postoffice is to provide the messaging transport and central address book or e-mail directory.

Outlook still functions as a full-featured e-mail client and desktop management system. However, its integration with group scheduling is limited to the basics such as sending and receiving meeting requests.

Other Client/Server Messaging Systems. Another configuration category is a client/server messaging system. Client/server messaging systems are e-mail systems that provide an intelligent server-based message store for users. Exchange Server is actually a client/server messaging system. Other client/server messaging systems include Lotus Notes and Hewlett-Packard OpenMail.

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Internet Mail and Online Services. If you set up an Internet Mail configuration, Outlook functions as a full-featured e-mail client and desktop information manager. It does not support group scheduling. The user's messages are stored locally in a .PST file. Outlook remotely connects to and downloads messages from an Internet mail service provider via the SMTP/POP3 driver.

This category also includes online services such as the Microsoft Network (MSN), America Online, and CompuServe. The drivers for these services do not ship with Outlook but are either available or currently in development and should eventually be available from Microsoft and other vendors.

Choosing a Profile

If you do not have a default profile, you are prompted by Outlook to select one each time you start a session. This profile is only used during that session. If you exit and log out from Outlook, you are prompted to select a profile again the next time you start Outlook. To select a profile when you do not have a default one, use the following steps:

1. Start Outlook to display the Choose Profile dialog box (see Figure 12.1).

FIG. 12.1
You can also use the Choose Profile dialog box to create a new profile.
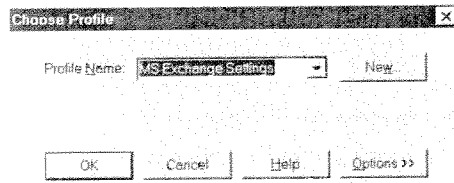
2. Select the profile you want to use from the Profile Name drop-down list box.
3. Choose OK to use the profile as the one for this session and to display the Outlook application.

Being prompted for a profile every time you start an Outlook session is fine if you use multiple profiles, but what if you use the same profile every time? In that case you want to set the default profile. This can be done two different ways. You can use the Choose Profile dialog box, or you can use Outlook's Options dialog box. To set the default profile in the Choose Profile dialog box, complete the following steps:

1. Start Outlook to display the Choose Profile dialog box (refer to Figure 12.1.)
2. Choose the profile you want to make the default from the Profile Name drop-down list box.
3. Choose the Options button to expand the dialog box as shown in Figure 12.2.

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FIG. 12.2
Setting a default
profile saves a step
when starting an
Outlook session.
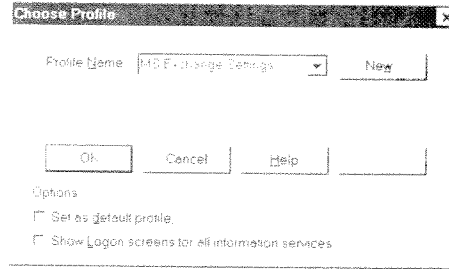
4. Click the Set as Default Profile check box.

5. Choose OK to set the default profile.

You can also set the default profile from within Outlook by using the Options dialog box. You can also change the default profile from this dialog box. To set the default profile using the Options dialog box, follow these steps:

1. Select Tools, Options to display the Options dialog box.

2. Select the General tab (see Figure 12.3).

FIG. 12.3
You can also use the
Options dialog box to
determine what your
default profile is.

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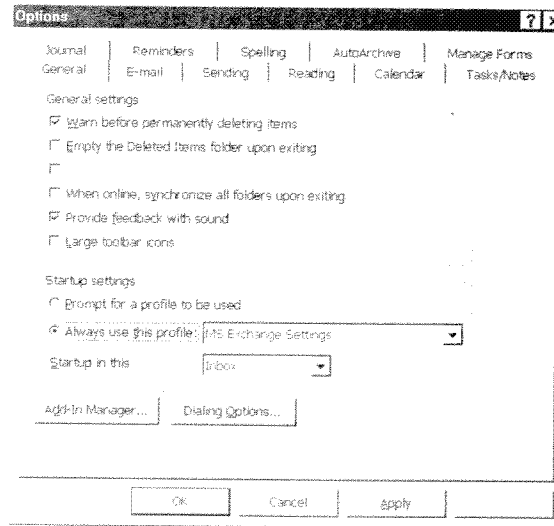
3. Select the profile you want to use as your default profile from the Always Use This Profile drop-down list box.

4. Choose OK to save the change.

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Exploring Your Current Profile

Profiles are managed in the Control Panel by clicking the Mail and Fax icon. By clicking this icon, you can do the following activities:

- Create new profiles
- Modify existing profiles
- View profile information
- Copy profiles
- Delete profiles

You can explore your profile with the Mail and Fax icon. To access the information about your profile, complete the following steps:

1. From the Start button on the desktop, select Settings, Control Panel.

2. Open Mail and Fax to display the MS Exchange Settings Properties window (see Figure 12.4). This window displays the services defined for the current profile.

FIG. 12.4
The MS Exchange
Settings Properties
window is used to
maintain profile
information.
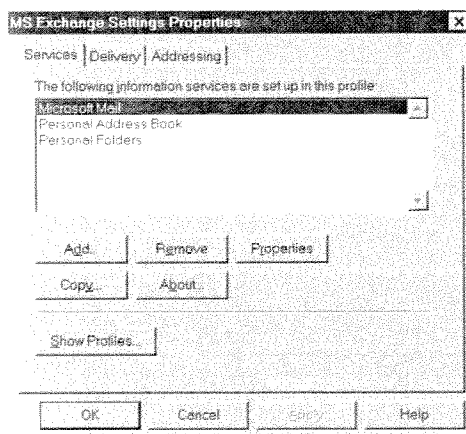
3. Choose Properties to display the service's properties window. The properties of that service are displayed in the service's dialog box. The appearance of this dialog box is dependent on the service selected.

4. After examining the service's properties, choose Cancel to return to the MS Exchange Properties Settings window. Choose OK to close the window. Choose Close to exit the profile information.

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Modifying Your Current Profile

Once you know how to examine your profile, you basically know how to modify it. Modifying a profile is done in the same area you previously used to examine the profile. You can modify a profile by adding a service, removing a service, or modifying properties of an existing service.

Adding a Service to a Profile

If you find that you cannot perform a messaging or information function with your profile, it means you need to add that service to your profile. For example, if you want to fax but find you can't, add the Microsoft Fax service to your profile. When you opt to add a service, a Setup Wizard starts. The wizard walks you through setting up the service by prompting you with a series of questions. Use the following steps to add a service to a profile:

N O T E   The Fax service does not ship with Windows NT 4.0.

1. From the Start button on the desktop, select Settings, Control Panel.
2. Click the Mail and Fax icon to display the MS Exchange Settings Properties window. This window displays the services defined for the current profile.
3. Choose Add to display the Add Services to Profile dialog box (see Figure 12.5).

FIG. 12.5

There are numerous services you can add through the Add Services to Profile dialog box.
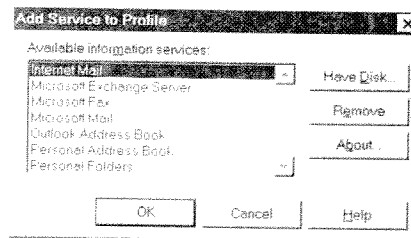
4. Select the service you want to add from the Available Information Services list box.
5. Choose OK to start the Setup Wizard for that service. Follow the wizard's instructions to set up the service.

Removing a Service from a Profile

If you find that you have a service in your profile that you never use, you might want to remove that service. Removing unneeded services creates a profile that is smaller and requires less system resources. To remove a service from a profile, follow these steps:

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1. From the Start button on the desktop, select Settings, Control Panel.
2. Click the Mail and Fax icon to display the MS Exchange Settings Properties window.
3. Select the service to be removed from the list box.
4. Choose Remove.
5. When prompted as to whether you are sure you want to remove the service, choose Yes to remove the service.

Modifying a Service's Properties

Each service in your profile has a unique set of properties. For example, the Mail service has properties pertaining to connection, log on, delivery, and so on. Any of these properties can be modified. You might need to change a password or a directory location. To modify the properties of a service in your profile, follow these steps:

1. From the Start button on the desktop, select Settings, Control Panel.
2. Click the Mail and Fax icon to display the MS Exchange Settings Properties window.
3. Choose Properties to display the service's properties window. The properties of that service are displayed in the service's dialog box. This dialog box appearance is dependent on the service selected.
4. Make the desired changes and choose OK.

Creating a New Profile

The Mail and Fax icon of the Control Panel is also used to create new profiles. Creating a profile is similar to modifying a profile. The main thing you are doing when creating a profile is adding services to it. Use these steps to create a new profile:

1. From the Start button on the desktop, select Settings, Control Panel.
2. Click the Mail and Fax icon to display the MS Exchange Settings Properties window.
3. Choose Show Profiles to display the Mail and Fax window (see Figure 12.6).
4. Choose Add to start the Setup Wizards. The Inbox Setup Wizard dialog box displays (see Figure 12.7).
5. Deselect any services you do not want to have as part of the new profile. Choose Next to display the next step of the wizard.

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FIG. 12.6
The Mail and Fax window lists existing profiles, as well as enabling you to add new ones.
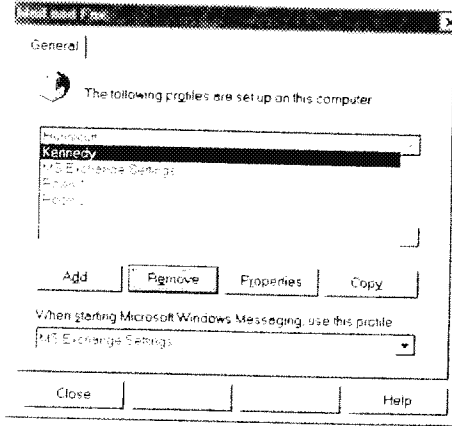
FIG. 12.7
By default, all services are selected to be added to the new profile.

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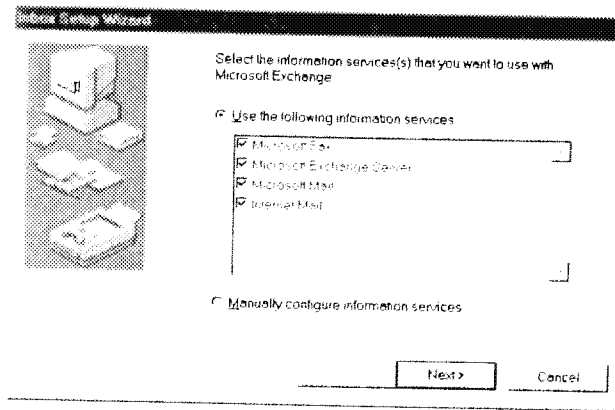
6. Enter the name for the profile, and choose Next to continue with the wizard. (See Figure 12.8)

FIG. 12.8
A profile's name can be up to 64 characters in length.

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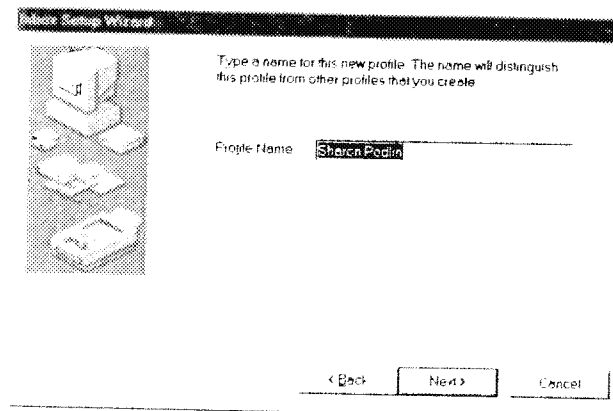
7. Continue responding to the prompts of the wizard. The dialog boxes displayed are dependent on which services you selected to add to the new profile.

8. When you reach the last dialog box of wizard, choose Finish to save the profile.

Deleting a Profile

If you have a profile on your workstation that you no longer use, you can delete it. You might, for example, have a profile that was used by someone with whom you shared your workstation. To delete an unwanted profile, use these steps:

1. From the Start button on the desktop, select Settings, Control Panel.

2. Click the Mail and Fax icon to display the MS Exchange Settings Properties window.

3. Choose Show Profiles to display the Mail and Fax window.

4. Select the profile you want to delete.

5. Choose the Remove button to delete the profile.

Renaming a Profile

One of the naming schemes used for profiles is to name the profile after its user. For example, if Joe Jones has a profile on a workstation, it might be named Jones or Joe Jones. But what if Joe moves to another workstation or leaves the company and you inherit his machine? You don't want to use a profile named Joe Jones if your name is Sue Smith. In this case, you'll want to rename the profile, and then change its properties to suit your needs. To rename a profile, use the following steps:

1. From the Start button on the desktop, select Settings, Control Panel.

2. Click the Mail and Fax icon to display the MS Exchange Settings Properties window.

3. Choose Show Profiles to display the Mail and Fax window.

4. Select the profile you want to rename.

5. Choose Copy to display the Copy Profile dialog box (see Figure 12.9).

6. Enter the name for the copy of the profile and choose OK to create the copy.

7. Select the old profile from the list box and choose Remove to delete it.

FIG. 12.9
The Copy Profile
displays the name of
the original profile
and enables you to
enter a name for the
new profile.
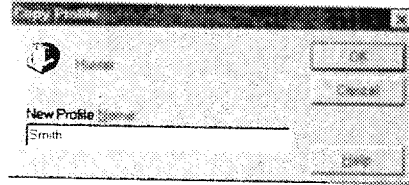
Working with Multiple Profiles

In the previous section, you created a copy of a profile as part of the procedure to rename a profile. When you copy a profile, all of the properties of that profile are copied as well. The only difference between the two profiles is their name.

You don't have to delete the original profile you copied. You can also use this technique to create multiple profiles based on a single profile. This is particularly useful if multiple users are using the same workstation and need basically the same profile. Create a profile to act as the template for the other profiles. Add the appropriate services to the profile. Then copy the profile, creating a profile for each user on the workstation.

From Here...

This chapter provided you with detailed information on using and working with profiles. Through the creation and use of profiles, you gain access to a variety of messaging and information services. To work with profiles, you use the Mail and Fax icon found in the Control Panel. Using the Mail and Fax icon, you can examine your current profile, as well as create new profiles.

After working with profiles you might want to work with a specific service such as the Microsoft Mail information service. Other services you might want to work with further include the Fax service and the Internet Mail information service. To do so, you should also review the material in the following chapters of this book:

- For detailed information on the Microsoft Mail information service, see Chapter 9, "Receiving and Sending Microsoft Mail Messages.

- For more information on the Internet Mail information service, see Chapter 20, "Sending and Receiving Internet E-mail."

- For information on configuring the cc:Mail information service, see Chapter 22, "Sending and Receiving E-mail from Other Services."

CHAPTER **13**

Working with Folders and Address Books

by Sharon Podlin

Outlook provides you with two basic ways of organizing information in Outlook: folders and address books. This chapter discusses how to create folders and address books, place information in them, and maintain them.

■ **Understanding and working with the standard folders**

Outlook uses folders to organize its information. It also enables you to create your own folders to organize your work.

■ **Working with the Outlook Address Book**

Address books give you a way to use your contact information to address messages as well as create distribution lists.

■ **Importing contact information from other sources**

If you are migrating from another application such as Microsoft Schedule+, you will want to import your contact information to Outlook.

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Understanding and Working with the Standard Folders

Whether or not you realize it, you have been working with folders the entire time you have been working with Outlook. An Outlook folder is a container for Outlook information. For example, all of your contacts are in a Contacts folder.

The folder list provides an interface for viewing and working with folders. Before we get into discussing folders in detail, let's take a look at the folder list. There are two ways to access the folder list:

- Click the Folder List toolbar button.
- Choose View, Folder List.

Either of these methods displays the folder list (see Figure 13.1). The folder list displays between the Outlook bar and the information viewer. The folder list displays as an outline. If you need to expand the area for the folder list, you can drag the right edge of the folder list pane to expand it.

FIG. 13.1
The folder list is an outline representation of your folder organization.
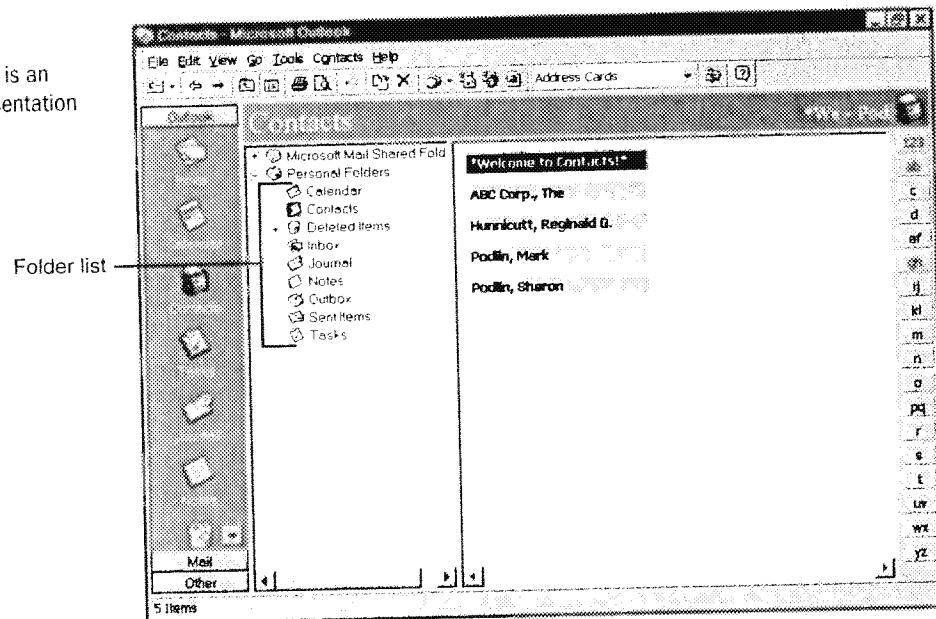
Folder list ⎯⎯

Outlook enables you to have folders within folders. When a folder is contained within another folder it is called a *subfolder*. If a folder contains subfolders, a plus sign (+) appears next to the folder in the folder list. Clicking the plus sign expands the Outline view for that

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folder and enables you to view the list of subfolders. When you expand a folder's view, a minus sign (-) appears next to that folder. To collapse or hide the subfolders, click the folder's minus sign. Figure 13.2 illustrates a folder list that contains and displays subfolders.

FIG. 13.2

The folder list is designed to enable you to hide or show details about folders.
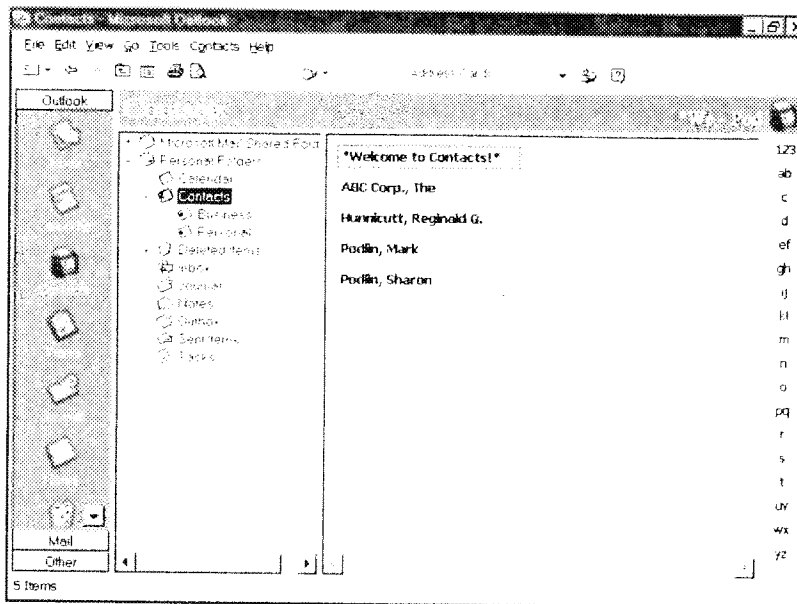
Working with Folders

At this point we are ready to examine the contents of the folder list. If you look at the list of folders, you'll find that they closely correlate to the list of icons in the Outlook bar—with two differences. The folder list has additional items named Outbox and Sent Items. The Outbox folder is the holding area for messages before they are delivered. The Sent Items folder is the default location for storing a copy of messages that you have sent. The default folders are listed below:

Calendar	Notes
Contacts	Outbox
Deleted Items	Sent Items
Inbox	Tasks
Journal	

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Creating Personal Folders and Subfolders

Outlook enables you to create personal folders and display them in the folders list. Adding folders gives you additional ways to organize your work and data in Outlook. Folders can also contain subfolders. Whether you use a folder or a subfolder is up to you and how you prefer to organize information.

Creating Personal Folders

Creating a new personal folder is actually very easy to do. It can be done using the File menu or using the shortcut menu available to the folders list. The basic process is to decide what type of folder you want to create and what you want to name it. There are six types of folders you can create based on the type of items you want to store in the folder:

- Appointment items
- Mail items
- Contact items
- Note items
- Journal items
- Task items

You may, for example, want to create a personal folder to hold all the tasks that relate to a specific project. Or you may want to create a personal folder so that you can separate personal contacts from business contacts. To create a personal folder, complete these steps:

1. Choose File, New, Folder or right-click Personal Folders from the folders list and select Create Subfolder to display the Create New Folder dialog box (see Figure 13.3).

T I P Instead of choosing File, New, Folder you can press Ctrl+Shift+E.

2. In the Name text box, type the name of the new personal folder. To be consistent with the naming of other folders in Outlook, begin the name with a capital letter. (The name can contain spaces if you want.)

3. In the Folder Contains drop-down list box, select the type of folder you want to create.

4. The next item in this dialog box is the Make this Folder a Subfolder Of list box. Since you are creating a personal folder, select Personal Folders from this list box.

5. (Optional) If you want, you may enter a description for this folder in the Description text box.

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FIG. 13.3

The Create New Folder dialog box is used to create personal folders as well as subfolders.
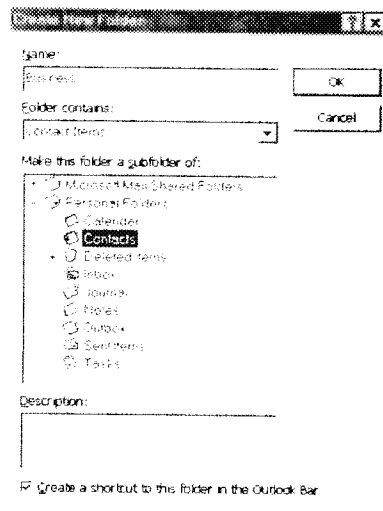
6. The last item in this dialog box is the Create a Shortcut to this Folder in the Outlook Bar check box. When this is checked, an icon representing this new folder is added to your Outlook bar. If you do not want an icon to be added, uncheck the check box. At this point the dialog box is completed (see Figure 13.4).

FIG. 13.4

This is an example of a completed Create New Folder dialog box.
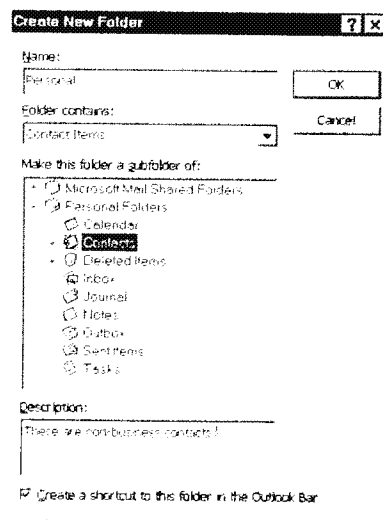
7. Click OK to create the new personal folder.

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At this point the new folder is added to the folder list. If you chose to create a shortcut to this folder, the icon has been added as the last one on the Outlook bar, as shown in Figure 13.5.

FIG. 13.5
This figure illustrates the addition of the new folder to the folder list as well as to the Outlook bar.
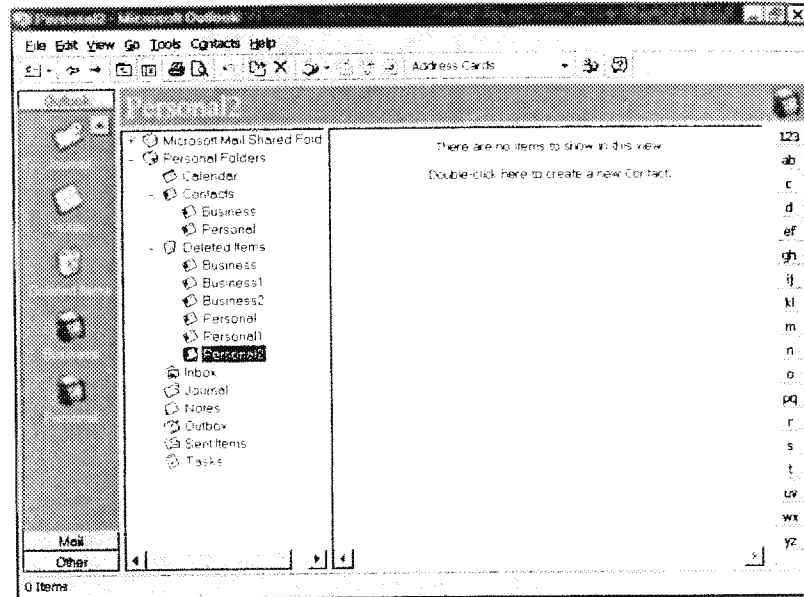
Creating Subfolders

Instead of creating a personal folder on the same level as the other Outlook folders, you may prefer to create a subfolder. For example, you might want to create two subfolders under Contacts, Business and Personal. After creating these subfolders, you might decide you want to further organize your personal contacts. You could create two subfolders under the Personal subfolder, Family and Other. Creating a subfolder is almost identical to creating a personal folder. The only difference is that you select the folder you want to create the subfolder under instead of selecting the Personal Folders level. Then you repeat the steps you used in the previous section for creating the folder. Figure 13.6 illustrates a folder list containing subfolders.

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FIG. 13.6
This folder list
illustrates subfolders
within subfolders.
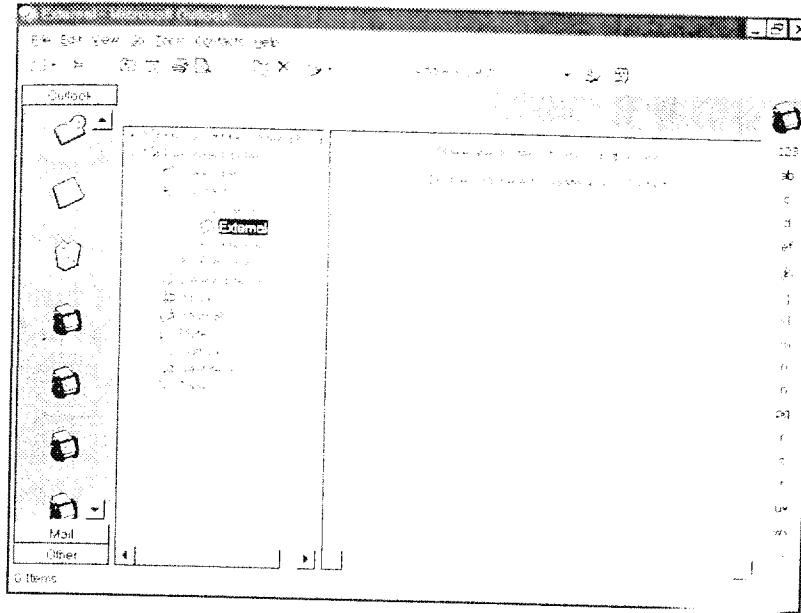
e Folder List

Maneuvering the folder list is accomplished through the use of the Expand and C.
buttons located to the left of a folder containing subfolders. The Expand button l
a plus sign (+) while the Collapse Outline button looks like a minus sign (-). A folder
an Expand button indicates that there are subfolders associated with that folder. Clic
Expand button to view a listing of the subfolders for that folder.

When you select the Expand button and subfolders are displayed, the
becomes a Collapse button. If you no longer want to view the subf
Collapse button and the subfolders are hidden from the view.

To move to the contents of various folders you can use your mouse and click the folder
from the folder listing, or you can use your up-arrow and down-arrow keys to traverse the
folder listing. If the currently selected folder is a subfolder, you can clic   One
Level toolbar button. This makes the parent folder the current folder

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Moving Information Between Folders

After you have created your new folders, you probably want to place items in them. When you were creating folders, you picked the type of items you wanted the folder to hold. This is because a folder can only hold one type of item. If you selected task items as the folder type, you can only place tasks in that folder. Outlook does not let you mix and match item types within a folder.

You can move information from one folder to another by using one of the following methods:

Drag and drop the item to the new folder location.

Choose Move to Folder from the shortcut menu of the item to be moved or from the Edit menu.

The fastest way to move an item from one folder to another is using the drag-and-drop method. You can either drag and drop the item to the folder through the folder list, or you can drag it to its shortcut menu on the Outlook bar using the following steps:

1. Select the current location of the item by either clicking the folder from the folder list or by using its shortcut icon from the Outlook bar.

2. Select the item to be moved from the information window.

3. Drag and drop the item to its new location. You can either drag it to a folder in the folder list or to the shortcut icon on the Outlook bar. The item is now relocated.

You can also use Edit, Cut followed by Edit, Paste to relocate an item.

CAUTION

If you use Edit, Copy to make a duplicate of an item and paste it to another folder, Outlook considers these two separate and individual items. This means that if you make a change to the original item it is not reflected in the copied item.

Setting Folder Properties

Personal folders and subfolders have properties that enable you to assign values to various settings that control the various behaviors. To access a folder's Properties dialog box, right-click the control and select Properties.

N O T E You may see additional tabs on folder properties like Synchronization and Permissions, if you are connected to a mail server such as Exchange Server.

Working with the General Tab

The General tab enables you to set some of the same properties that you may use when creating the folder shown in Figure 13.7.

FIG. 13.7
The General tab is used to set general information such as the folder's name and description.
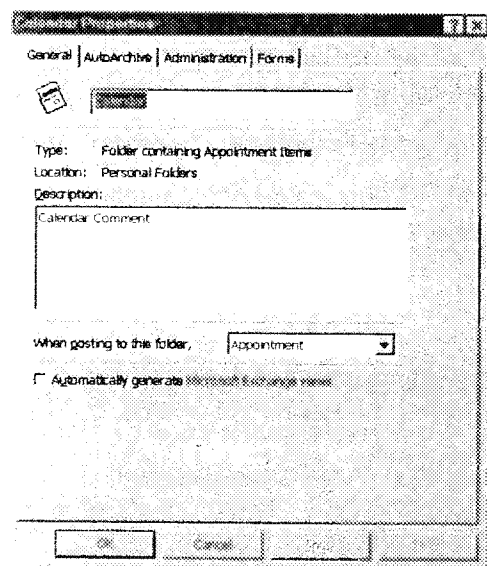
The property settings found on the General tab include the following:

* *Name.* The first text box on this tab contains the current name of the folder. If you want to change the name, enter a new one into this text box.

T I P You can also change a folder's name by right-clicking the folder and selecting Rename from the shortcut menu.

* *Type.* Type is a read-only field that describes what type of items can be placed in this folder.
* *Location.* This gives the name of the parent of this folder.
* *Description.* If you did not enter a description when you created the folder or if you want to enter a new one, enter it in the Description text box.

■ *When Posting to this Folder*. If this item is posted, this enables you to select the type of item or folder that is used to post the folder.

■ *Automatically Generate Microsoft Exchange View*. A Microsoft Exchange Client cannot recognize Outlook Forms. Use this option to generate a view for Microsoft Exchange clients.

Working with the AutoArchive Tab

The AutoArchive tab enables you to set AutoArchive options. When the AutoArchive feature is activated, Outlook automatically archives items based on a certain period of time for you. The default location of archived items is \My Documents\archive.pst.

The first step to using the AutoArchive feature is to turn it on through the Options dialog box by using the following steps:

1. Choose Tools, Options from the main Outlook menu to display the Options dialog box.

2. Select the AutoArchive tab (see Figure 13.8).

FIG. 13.8
The AutoArchive tab of the Options dialog box is used to turn the AutoArchive feature on for folder items.
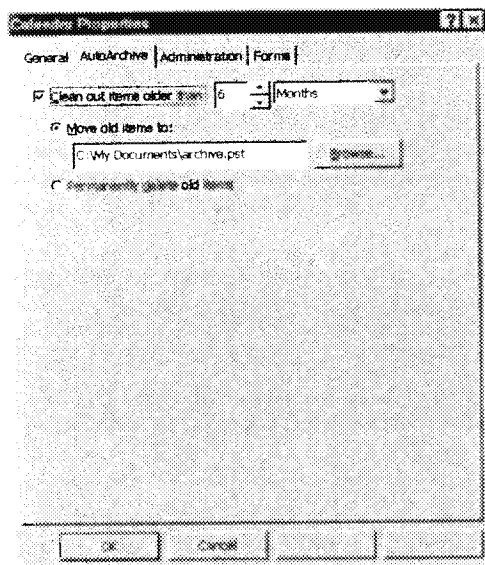
3. If there is not one already there, place a check in the AutoArchive check box (this is the default setting for Outlook) and click OK.

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After turning this feature on for the Outlook application, you need to set the AutoArchive options for each folder. Which items are to be AutoArchirved, and when, is determined at the individual folder level. This is done through the AutoArchive tab of the folder's Properties dialog box.

Depending on what type of Outlook folder you are working with, there are different default AutoArchive property settings. The following folder types have AutoArchiving turned on by default:

- *Calendar.* Archives items older than six months.
- *Deleted Items.* Deletes items older than two months.
- *Journal.* Archives items older than six months.
- *Sent Items.* Archives items older than two months.
- *Tasks.* Archives items older than six months.

Three folder types do not have AutoArchive turned on as a default or do not support AutoArchiving. These are listed below:

- *Inbox.* Does not have AutoArchive turned on as a default.
- *Notes.* Does not have AutoArchive turned on as a default.
- *Contacts.* Does not support AutoArchiving.

When archiving occurs, your existing folder structure is duplicated and maintained in your archive file. For example, if the folder being archived is a subfolder, the parent folder is created in the archive file. However, items within the parent folder are not archived in the archive file. This way an identical folder structure exists between the archive file and your folder list.

At this point you are ready to work with the AutoArchive properties of the folder. The property settings found on the AutoArchive tab include the following:

- *Clean Out Items Older Than.* You can either accept the default values for this setting as discussed earlier, or you can set your own preference. If you are setting your own, select a number to represent the frequency as well as a time period. Available time periods are Months, Weeks, or Days.
- *Move Old Items To.* The Move Old Items To option button is the default setting, and lets Outlook know that you are archiving the items to a file. If this option button is selected, you can either accept the default file of \My Documents\archive.pst or select a different file and file location.
- *Permanently Delete Old Items.* If you do not want to archive the items but do want to permanently delete old items, select this option button.

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Working with the Administration Tab

The Administration tab (see Figure 13.9) enables you to set several properties that have to do with the behavior of the folder and its items. The listing below discusses these settings:

FIG. 13.9

The Administration tab contains the properties that control advanced properties such as view information.
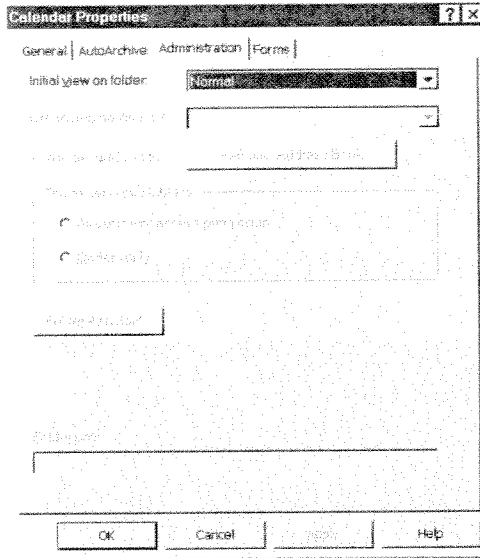
- *Initial View on Folder.* The Initial View on Folder drop-down list box enables you to select the view you want to appear when you first open the folder.
- *Drag/Drop Posting is A.* This option is not available for personal folders. If this was a public folder, this drop-down list box would be used for selecting the format for items moved or copied to the public folder.
- *Personal Address Book.* This option is not available for personal folders. If this was a public folder, you could click the Personal Address Book button to add the folder address to your Personal Address Book. After the folder address is added to your Personal Address Book, you can send mail directly to this folder.
- *All Users with Access Permission.* This option is not available for personal folders. When working with a public folder, this option button can be selected to provide access to this folder to all users who have the appropriate permission.
- *Owners Only.* This option is not available for personal folders. If this was a public folder you could select this option button to limit access to owners of the public folder.

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Folder Assistant. This option is not available for personal folders. Selecting this button enables you to change the rules for processing new items posted in the public folder.

Folder Path. This option is not available for personal folders. This area displays the location of the current public folder.

Working with the Forms Tab

All Outlook items are based on forms. A form enables you to distribute and collect information electronically. Outlook comes with built-in forms such as the New Contact form to enter information for a contact. If you want more information on forms, see Chapter 27, "Modifying and Creating Forms." The Forms tab (see Figure 13.10) enables you to determine form settings for this folder. The available settings are as follows:

FIG. 13.10
The Forms tab settings control the use of Forms for the items in this folder.
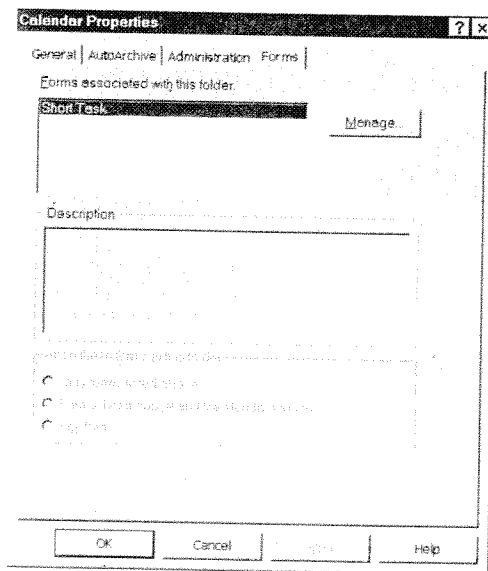
Forms Associated with this Folder. This list box contains the forms you have copied or installed to the folder.

Manage. When you click the Manage button, the Forms Manager dialog box displays. The Forms Manager dialog box enables you to copy a form from one forms library to the Folder Forms Library. It is also used to install a new form in the Folder Forms Library. For more information on the Folder Forms Library, see the section, "Creating a Form," in Chapter 27.

Description. The read-only Description box shows the description of the selected form.

Only Forms Listed Above. This option is not available for personal folders. When this option button is selected, only forms listed under Forms Associated with this Folder can go in the folder.

Forms Listed Above and the Standard Forms. This option is not available for personal folders. When this option button is selected, only forms listed under Forms Associated with this Folder, new message forms, new post forms, application forms, contacts, tasks, and files such as documents and spreadsheets can go in the folder.

Any Form. This option is not available for personal folders. By selecting this option button, any form can go in the folder.

Once you have made the changes to the desired properties, click OK to save the changes.

Viewing Files Through Outlook

In the Windows 95 and Windows NT environments, file directories appear as folders on the desktop. Files are objects within folders. Outlook enables you to view folders and files using an interface similar to the Windows Explorer. Using this interface, you can view and open your files. You are not limited to the files on your local workstation. You can also view and open files that you have access to through your network.

Viewing files using Outlook enables you to quickly perform typical file management operations without leaving Outlook. These file operations include the following:

- Opening files
- Copying files
- Moving files
- Renaming files
- Printing files
- Deleting files
- Viewing file properties
- Faxing or mailing files
- Sending files to your Briefcase
- Connecting or disconnecting from a network drive

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Viewing network drives, folders, and files through Outlook is done by using the Other group found on the Outlook bar. To view network drives, folders, and files, use the following steps:

1. Choose the Other group button from the Outlook bar.
2. Choose My Computer to display the drives, folders and files you have access to through your desktop (see Figure 13.11).

FIG. 13.11
The Other group enables you to view drives, folders, and files in a manner similar to that of the Windows Explorer.
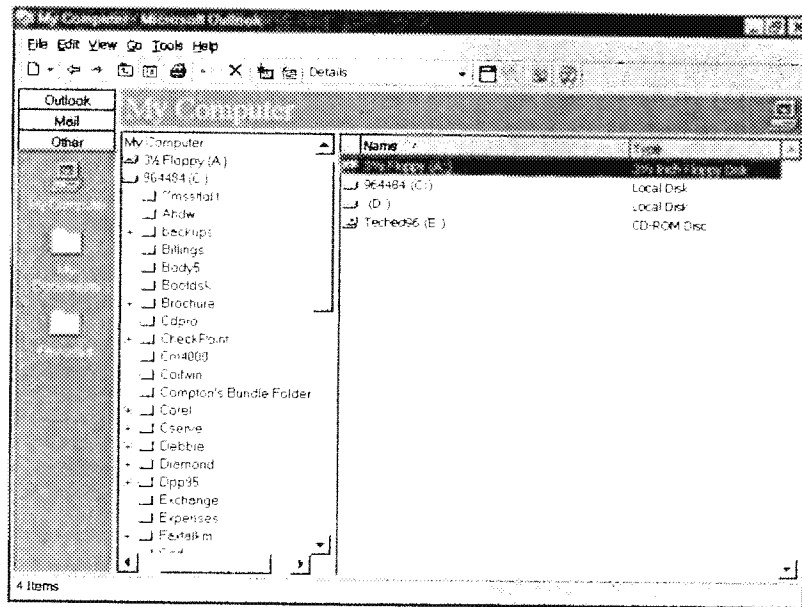
3. To view the folders and files as icons, select View, Current View, Icons (see Figure 13.12).
4. To view the details of name and type for folders and files, select View, Current View, Details (see Figure 13.13).

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FIG. 13.12

The Icons view
provides an interface
that most Windows
users are familiar with.
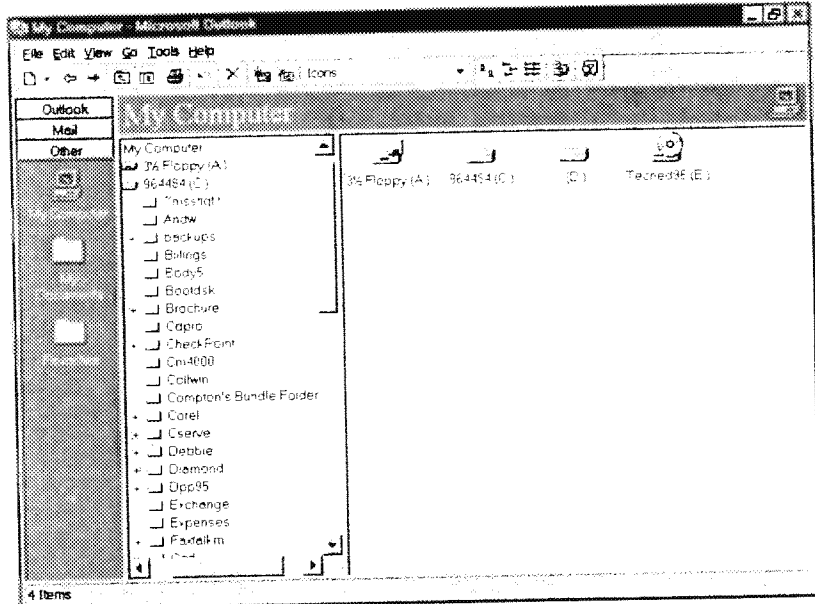
FIG. 13.13

The Details view en-
ables you to easily
identify folder and
file types.

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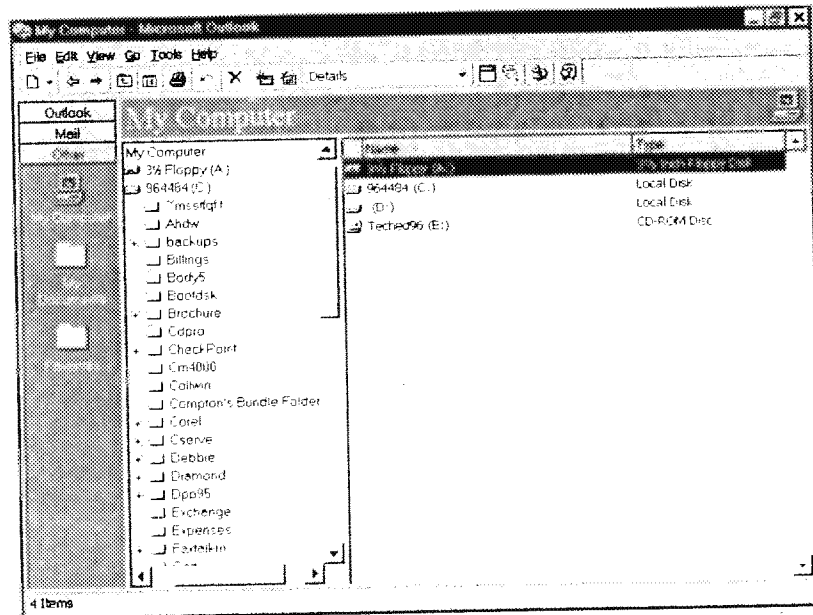
Using Folders with Exchange

When you are using Outlook in conjunction with Microsoft Exchange Server, you have two more types of folders to work with. These folder types are public folders and offline folders.

Public Folders

Public folders enable you to organize information just like any other folder. They differ from standard Outlook folders in the way that they enable you to share information with other people in your organization. If you want to share a file, you can put it in a public folder. For example, if you wanted to share a note, you can place it in a public folder. You can store any file or Outlook item you want to share in a public folder.

Public folders can be used in a variety of ways. You can use public folders to do the following activities:

- *Share any Outlook item.* This means you can share Calendar items, a contact, tasks, notes, and so on. For example, if someone else needs a contact that you already have entered in Outlook, you can place it in a public folder. The person who needs it can then drag it from the public folder into his or her contacts list without having to retype the information.

- *Sharing files.* You can place word processing files, worksheet, database files, and so on into a public file to make it available to other users.

- *Creating a bulletin board system.* Bulletin boards are used for an assortment of activities. For example, you can use a bulletin board to organize an online roundtable discussion about a product that is proposed for adoption. Or you can use it to post information such as equipment that you no longer need or to post requests for needed equipment. The easiest way to do this is to ask your administrator to create a public folder and then you can post notes to it.

To use the public folder feature, you must have access to Microsoft Exchange Server. You must also have permission to read items. Public folders are typically created and maintained by Exchange administrators. The administrator can designate other users to create and maintain public folders by assigning them the appropriate permissions. If you have permission to do so, you can set up your own public folders and give other people permission to use them.

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Offline Folder

Another type of folder available if you are using Outlook with Exchange is an offline folder. *Offline folders* are used to store information that you would typically want to store on the network but can't because you are not currently connected to Exchange. An example of this is if you are using a laptop computer outside of the office and do not have a modem link. Using an offline folder, you can take a folder from a server location and work with the contents of the folder when you are not connected to the network. When you are connected to the network again, you can update both your offline folder and the server folder.

Working with an offline folder is just like working with any other folder. You can add, delete, and modify the contents of an offline folder just as you would with a server folder.

When you are using an offline folder, you are making changes to its contents. The contents of the server folder it is based on may also change while you are working offline. To integrate the changes between the offline and server folder, you need to synchronize them. The Tools, Synchronize menu connects you to the server, copies the changes made in each folder to the other folder, and then disconnects you from the server.

N O T E   If an item is deleted from either the offline folder or the corresponding server folder, it is deleted from both folders.

Offline folders are stored in the offline folder file that has the extension .OST. This file is stored on your local hard drive so that it is available when the network is down.

Working with the Address Books

When you address a message, you typically look up a person's address by clicking the To or Cc button. This displays the Select Names dialog box (see Figure 13.14). There can be several types of address books you can use to select addresses from, including the Global Address List, Personal Address Book, and Outlook Address Book. These address books are available through the Show Names From The drop-down list box.

Each of these three address lists contains addresses that you can use when creating a message. A description of the contents of these lists follows:

Global Address Book. This is also known as the Postoffice Address List. This address book contains all the e-mail addresses for users and groups, as well as distribution

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lists that have been defined for your organization. Your postoffice administrator creates and maintains this address book.

FIG. 13.14
The Select Names dialog box aids you in addressing your message and enables you to select from a variety of address lists.
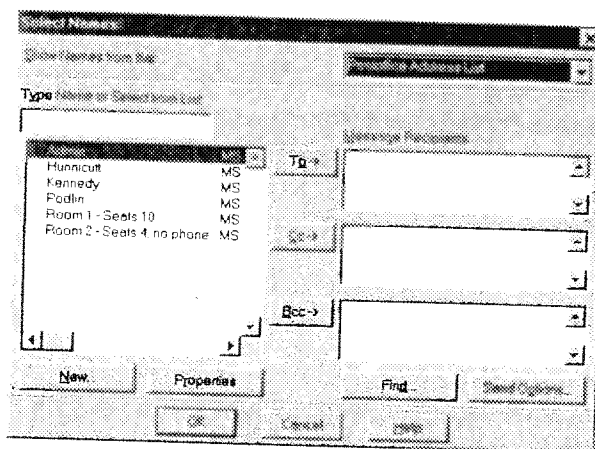
- *Personal Address Book.* The Personal Address Book can contain personal distribution lists for use with messages frequently addressed to standard groups of people. You may want to create, for example, a distribution list with the names of everyone in your department or one for preferred vendors.

- *Outlook Address Book.* The Outlook Address Book is an address book automatically created from contacts in your Contacts folder. The entries in this address book are contacts that include an entry in the E-mail field or Fax Phone Number field. This is a broader address list than the Global Address list in that the entries in this book can be people inside and outside your organization.

Another difference between this book and the Global Address Book is that you can have more than one e-mail address for each contact. Don't forget that when you create contacts, you can enter multiple e-mail address for each so that, for example, you can maintain a business and home e-mail address for your contacts. The same applies to fax numbers. When you update your contacts in the Contacts folder, the Outlook Address Book updates automatically. Your Contacts folder appears as a separate entry under Outlook Address Book in the Show Names From The drop-down list box.

N O T E If your organization is using Microsoft Exchange Server, you can also add an address for a public folder to the Personal Address Book.

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TROUBLESHOOTING

When I try to select the Outlook Address Book from the Show Names From The drop-down list box, I am told there are no entries. If you know that the Outlook Address Book is part of the profile you are using and you do not have entries in it, right-click the Contacts icon from the Outlook bar and select Properties to display the Contacts Properties dialog box. Select the Outlook Address Book tab. Place a check in the Show This Folder as an E-mail Address Book check box and choose OK to save the change. For more information on this, see "Creating and Using Personal Outlook Address Books" found later in this chapter.

Creating and Using Personal Outlook Address Books

The first step to using an Outlook Address Book is adding the Outlook Address Book service to your profile. Until this is done, you cannot add entries to the Outlook Address Book. To add this service, use the following steps:

1. From the Windows Start menu, select Settings, Control Panel to display the Control Panel window.
2. Open Mail and Fax to display the MS Exchange Properties dialog box.
3. Select Add to display the Add Service to Profile dialog box. This enables you to add services to the default profile.
4. From the Available Information Services list box, select Outlook Address Book and choose OK.
5. Select OK to make the change to the profile.

At this point you still are not ready to use the Outlook Address Book. You need to let Outlook know that you want to use your Contact information as entries for the Outlook Address Book. To do this, complete the following steps:

1. Select the contact folder you want to display in the Address Book dialog box.
2. Either choose File, Folder, Properties or right-click the folder and select Properties to display the Properties dialog box.
3. Select the Outlook Address Book tab, as shown in Figure 13.15.
4. Select the Show This Folder as an E-mail Address Book check box to place a check in it.
5. If you want to use a name other than the folder name for the name of the address book, enter a new name in the Name of Address Book text box.
6. Click OK.

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FIG. 13.15
The Outlook Address Book tab is only available to contact item type folders.
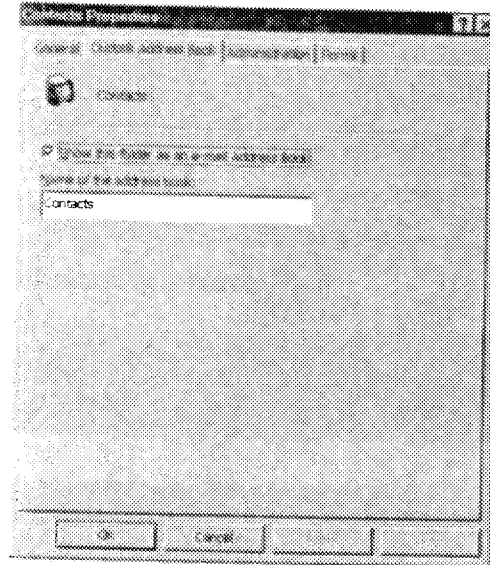
TROUBLESHOOTING

What if I have created subfolders under my Contacts folder? How does this affect the Outlook Personal Address Book? You can add all of the subfolders in the same manner, or just select folders. It's your choice.

After you have configured Outlook to use the entries in Contacts as entries in the Outlook Address Book, you use these addresses just like the address found in the Postoffice address list. To address a message using an address from the Outlook Address Book, follow these steps:

1. Go to the Inbox.
2. Click the New Mail Message toolbar button or choose File, New, Mail Message to display the Message dialog box.
3. Click the To button to display the Select Names dialog box (see Figure 13.16).
4. From the Show Names From The drop-down list box, select the desired Outlook Address Book entry. The contact entries with e-mail addresses and fax numbers are displayed in the address list box, as shown in Figure 13.16.
5. Select the address you want to use and click either To, Cc, or Bcc.
6. Click OK to return to the Message dialog box. Continue creating the message as you would normally.

FIG. 13.16
Any contact that
has either an e-mail
address entry or a fax
number displays when
the Outlook Address
Book is selected.
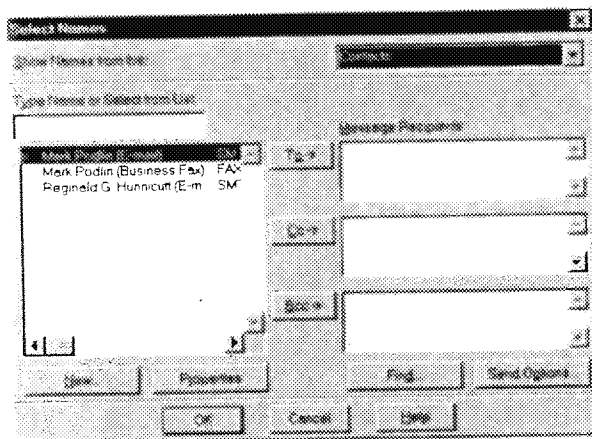
Using the Outlook Address Books with Automatic Name Checking

Before you send a message, Outlook automatically checks the names you type in the To, Cc, and Bcc boxes against the names in the Address Books. If an exact match is found, the name is underlined. If multiple names are found that match the entry, a red, wavy line appears under the name. To see what other addresses are available for that name, right-click that name. This is particularly useful when working with the Outlook Address Book because you can have multiple e-mail as well as fax addresses for the same contact.

The Outlook Address Book is not, as a default, used with automatic name checking. If you want to have it used with name checking, you need to add it to the list of address books used. To add the Outlook Address Book as an address book to be checked for names, use these steps:

1. Select Tools, Services to display the Services dialog box.
2. Select the Addressing tab (see Figure 13.17).
3. Click Add to display the Add Address List dialog box (see Figure 13.18).
4. In the Address Lists list box, select the Outlook Address Book you want to add. This is typically named Contacts. Select Add and Close to save the change.
5. Select OK to close the Services dialog box.
6. To start using the Outlook Address Book, you must exit and restart Outlook.

You may prefer to import your Personal Address Book (PAB) to your new Contacts folder. If so, you'll find this procedure in Chapter 25, " Exporting and Importing Items."

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FIG. 13.17
The Addressing tab
enables you to add an
address book for use
with automatic name
checking and to
change the order in
which the books are
checked.
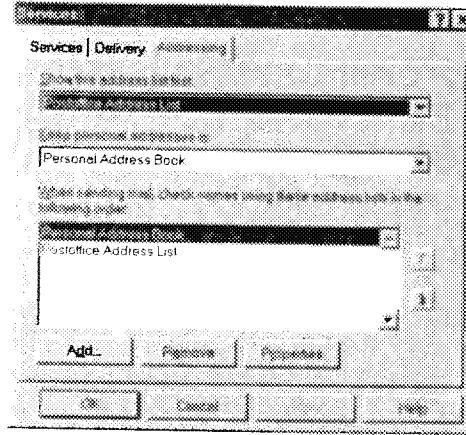
FIG. 13.18
All available address
lists are displayed in
the Add Address List
dialog box.
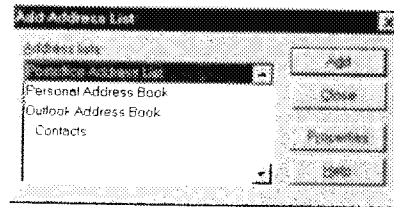
Creating and Using Distribution Lists

After you have created a Personal Address Book, you can create distribution lists. *Distribution lists* enable you to quickly and easily send the same message to a standard group of people. A typical example of a distribution list is your own department. If you send memos to everyone in your department as a standard procedure, then create a distribution list for them. Another example is if you frequently request bids from a group of vendors. Create a distribution list for these vendors. Maybe all of your friends have e-mail addresses and you need to remind them every week about the bowling game. This is another example of a use for a distribution list.

If you haven't created a Personal Address List yet, see the section earlier in this chapter, "Creating and Using Personal Address Books." After you have created your Personal Address Book, follow these steps to create a distribution list:

1. Choose Tools, Address Book to display the Address Book dialog box as shown in Figure 13.19.

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FIG. 13.19
The Address Book
dialog box can be
used to create
distribution lists by
creating a new entry.
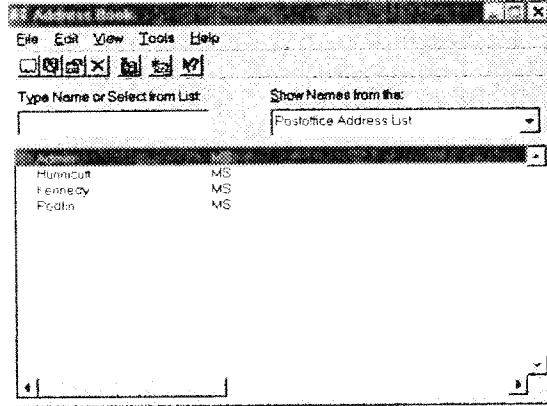
2. Click the New Entry toolbar button. This displays the New Entry dialog box shown in Figure 13.20.

FIG. 13.20
The New Entry dialog
box provides you with
the option of creating
a new personal
distribution list.
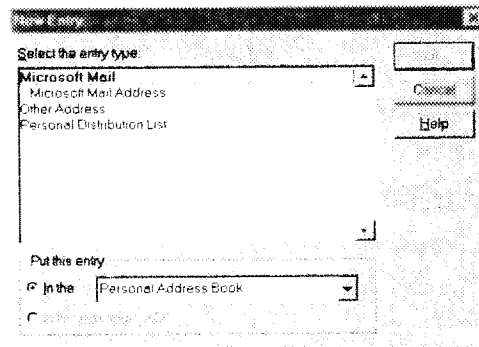
3. From the Select the Entry Type list box, select Personal Distribution List and click OK. The New Personal Distribution List Properties dialog box displays (see Figure 13.21).

4. Enter a name for the distribution list in the Name text box.

5. Click Add/Remove Members to display the Edit Members dialog box (see Figure 13.22).

6. From the Show Names From The drop-down list box, select the address book that contains the names you want to add to your personal distribution list.

7. Select the name you want to add to the distribution list and click Members. Continue adding names until all have been added.

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FIG. 13.21

The New Personal Distribution List Properties dialog box enables you to name the new distribution list as well as select the members of the distribution list.
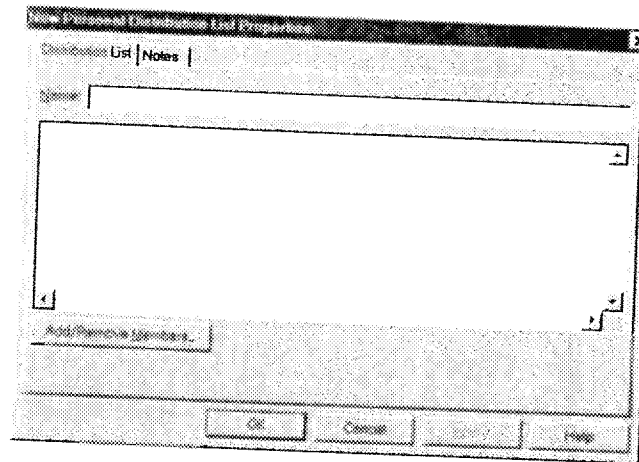
FIG. 13.22

You can select names from any address list, including the Personal Address Book and the Postoffice address list.
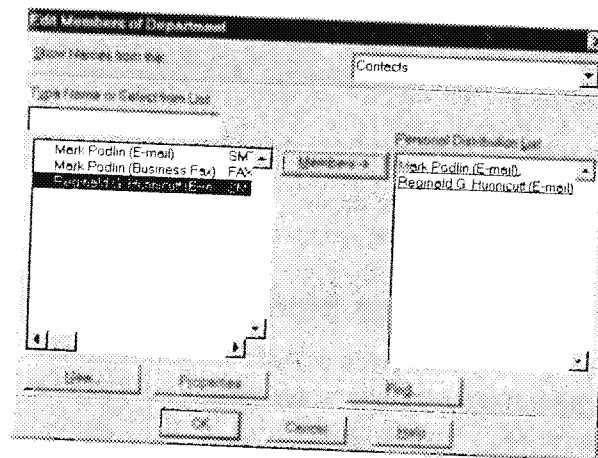
8. You can mix names from different address books and lists in the same distribution list. Select another address book from the Show Names From The drop-down list box if necessary and continue selecting members.

9. When all members have been selected, click OK to return to the New Personal Distribution List Properties dialog box.

10. If you want to enter notes about this distribution list, select the Notes tab and type any appropriate descriptive information.

11. Click OK to create and save the distribution list. You are returned to the Address Book dialog box.
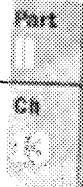
12. If you want to verify that the distribution list was created, choose Personal Address Book from the Show Names From The drop-down list box. Any existing distribution lists display in the Address Book dialog box shown in Figure 13.23.

FIG. 13.23

A distribution list named Department has been created. The newly created distribution list displays when the contents of the Personal Address Book is shown.
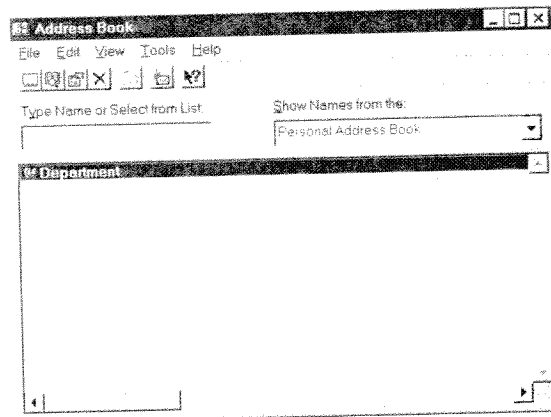
13. Click OK to exit the Address Book dialog box.

After the distribution list has been created, you are ready to use it. Using a distribution list to address a message is identical to using any other address.

Setting Your Personal Address Book Properties

Just like folders, your Personal Address Book has settable properties. Using these properties, you can change the name of the address book, how names are displayed in the address book, and so on.

To change the properties of your Personal Address Book, use the Address Book dialog box. To access this dialog box and set properties, complete the following steps:

1. Choose Tools, Address Book to display the Address Book dialog box.

2. Select Tools, Options to display the Options dialog box.

3. From the When Sending Mail list box, select Personal Address Book.

4. Choose the Properties button to display the Personal Address Book Properties dialog box (see Figure 13.24).

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FIG. 13.24

Using the Personal
Address Book
Properties dialog box,
you can change the
name of your address
book and how it
displays names.
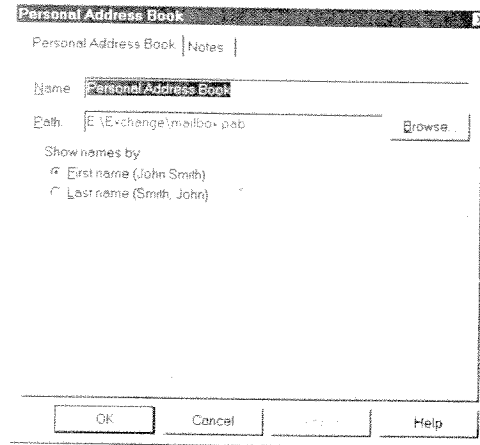
5. If you want to rename the Personal Address Book, type a new name in the Name text box.

6. If you want to assign a new file location for the Personal address book, type the new path and file name into the Path text box or use the Browse button to select a location.

7. If you want to change the way names are displayed in the Personal Address Book, click either the First Name option button or the Last Name option button.

8. If you want to enter notes about the Personal Address Book, select the Notes tab and type the desired note.

9. Choose OK to save the changes. Choose OK again to return to the Address Book dialog box.

10. Close the Address Book dialog box.

Importing Contact Information from Other Sources

If you are converting from another contact management or e-mail system to Outlook, you probably want to import the information from that application into Outlook. You may have an investment of hundreds or even thousands of addresses in your old application. Re-entering them doesn't sound like a viable (never mind pleasant!) option.

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Outlook can import data in several different file formats. Table 13.1 below lists these file formats.

Table 13.1   Outlook's Supported Import File Formats

Product	File Extension
ACT! 2.0 for Windows*	.DBF
Comma Separated Values (DOS)	.TXT
Comma Separated Values (Windows)	.CSV
dBASE	.DBF
ECCO 3.0, 3.01, or 3.02*	.ECO
Lotus Organizer 1.0, 1.1, 2.1*	.ORG, .OR2
Microsoft Access	.MDB
Microsoft Excel	.XLS
Microsoft Exchange Personal Address Book	.PAB
Microsoft FoxPro	.DBF
Microsoft Schedule+ 1.0	.CAL
Microsoft Schedule+ 95	.SCD
SideKick 1.0/95*	.SKCARD
Tab Separated Values	.TXT

The applications marked with an asterisk (*) in the above table do not have converters that install as part of the standard Outlook installation. These converters are available in the ValuPack folder on the Office 97 CD-ROM.

Importing is done through the File, Import and Export menu command. By selecting this menu, you start Outlook's Import and Export Wizard. For example, if you wanted to import a Personal Address Book from Schedule+, you would complete the following steps:

1. Choose File, Import and Export to display the Import and Export Wizard (see Figure 13.25).

2. From the Choose an Action to Perform list, select Import from Schedule+ or another program or file and click Next. The Import a File dialog box displays (see Figure 13.26).

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FIG. 13.25
The first step of using the Import and Export Wizard is to choose what you are importing or exporting.
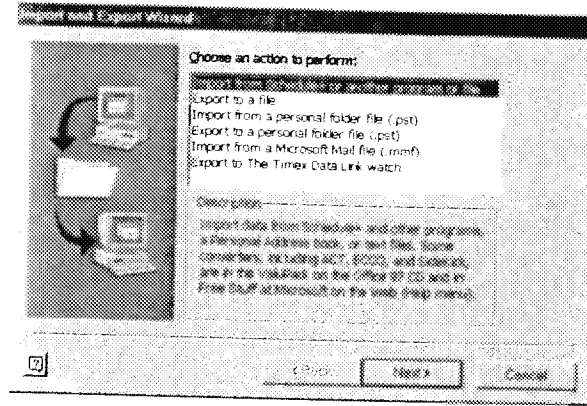
FIG. 13.26
The Import a File dialog box displays a list of installed file import converters.
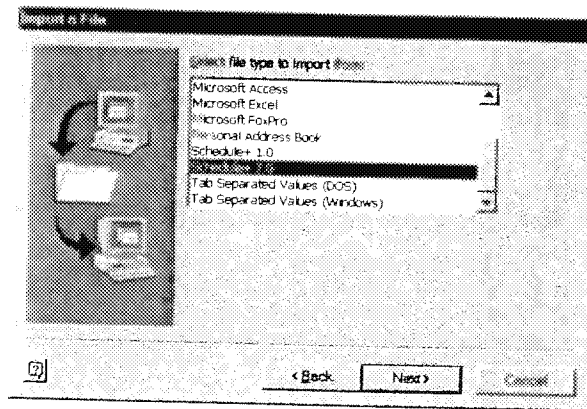
3. Choose the desired file type from the Select File Type to Import From list box, and click Next to display the next dialog box (see Figure 13.27).

4. Using the Browse button, select the file to import. When the file has been selected, click Next to display the next step (see Figure 13.28).

N O T E You may be prompted for a Schedule+ password at this point.

FIG. 13.27
After selecting the type of file to import, you must tell Outlook the actual path and file name that is being imported.
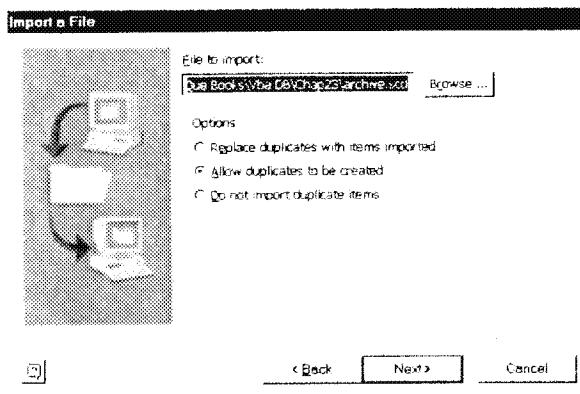
FIG. 13.28
As preparation for the import, Outlook lets you review the actions before they are performed.
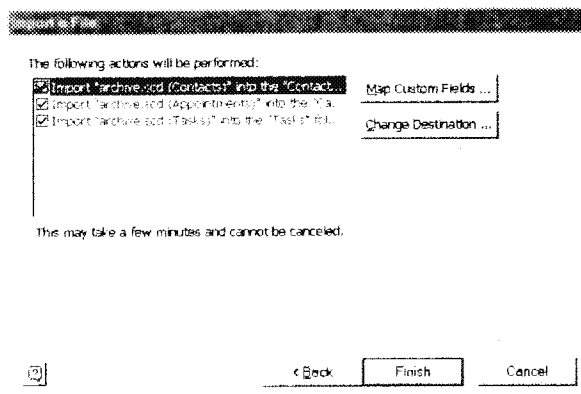
5. The actions to be performed are listed for you in this dialog box. If you do not want all of the actions listed to be performed, deselect the undesired ones. Click Finish to perform the Import.

The items have now been imported and are ready for your use in Outlook.

From Here...

In this chapter you learned about how Outlook uses folders to organize its information, and how you can create your own folders to organize your work. This chapter also discussed the different address books that are available to you through Outlook. You learned how to utilize the Outlook Address Book so that the information you are entering in Contacts is available to you when you want to create a message. You also learned how to set

some of the options for your Personal Address Book. Finally, you found out how to import contact information from other applications. For information on related topics, see the following chapters:

- Chapter 5, "Creating and Using Contacts," contains additional information on working with contacts.

- Chapter 9, "Receiving and Sending Microsoft Mail Messages," provides you with detailed information on creating messages.

- Chapter 19, "Providing More Information About Contacts," gives you information about customizing the Contacts area.

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CHAPTER

19

Providing More Information About Contacts

by Sharon Podlin

The Contacts view is designed to let you track detailed information about personal and business contacts. For each contract, you can track several different phone numbers, addresses, as well as e-mail and Web information. Because of this, there are several ways you might want to view the data using table and card views. Also, contact information is a natural for sorting, filtering, and grouping.

Formatting the Contacts view

Though the card views available through Contacts might look different from some of the other views available in Outlook, formatting them is done with similar steps. Changing the card views fonts and other settings is discussed in this section.

Working with Contact fields

Contacts has the most fields of any area of Outlook. What these fields are and which views use them is discussed here.

Providing detailed information about a contact

Contact information is not limited to phone numbers, names, and addresses. Detailed information such as birthdays and anniversaries can be added through the Details tab.

Sorting and filtering Contacts

With all of the fields available, there are numerous filtering and sorting opportunities available for Contacts.

Formatting the Contacts View

Up to this point, we have worked with several types of views, including table, Day/Week/Month, and timeline. The Contacts view adds another to the list: card. A card view gives you a summary of the detailed information on a contact and displays several of these summaries on-screen at one time.

There are several ways that you can format the card views. You can change the font of the view. Other things you can do to change the appearance and behavior of the card views include changing how a contact is filed and setting spell checking options.

T I P

You may want to hide the folder list when working with the Contacts views so that you can see more contacts at one time. To do this, select the View menu. Select Folder List to remove its check mark and hide the folder list.

Changing the Fonts of Card Views

As with any of the views, you can format the fonts used with the Card views. Card views only have two things for which you can change the font: the card headings and the card body. The default settings for these follow:

- Card heading—8 point bold Tahoma
- Card body—8 point Tahoma

To change the format of the fonts used by a card view, follow these steps:

1. Choose View, Format View to display the Format Card View dialog box (see Figure 19.1).

FIG. 19.1
You might want to decrease the font size used by the card view to display more contacts on-screen.
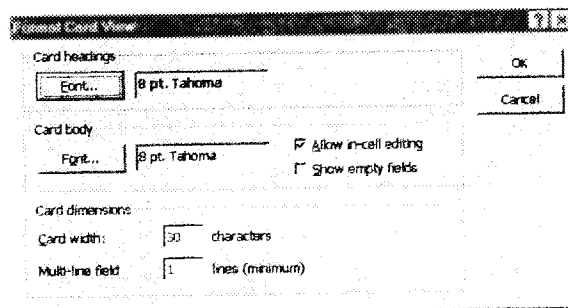
2. Choose the Font button from the Card Headings group to display the Font dialog box. Make the desired font changes and choose OK.

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3. Choose the Font button from the Card Body group to display the Font dialog box. Make the desired font changes and choose OK.

4. Choose OK to implement the changes.

Making Other Format Changes

The Format Card View dialog box allows you to make other changes to the view as well. Using this dialog box, you can set the maximum card width displayed and the minimum number of lines in an address field. You can also set whether or not to allow in-cell editing. Another option you might want to use is to display empty fields. To work with these settings complete the following steps:

1. Choose View, Format View to display the Format Card View dialog box (refer to Figure 19.1).

2. If you want to disable in-cell editing, click the Allow In-cell Editing check box to remove the check from it.

3. To display empty fields, click the Show Empty Fields check box to place a check in it.

4. To set the width of the cards displayed in the card view, enter a new value in the Card Width box. The default setting for the card width is 30 characters.

5. To set the minimum number of lines that the address box can contain, enter a new value in the Multi-line Field box.

6. Choose OK to save the changes.

Changing How a Contact Is Filed

Another thing you might want to change is the way a contact is filed in the contact list. As a default, Outlook files contacts by last name, first name order or company name depending on how the contact is entered. Typical choices include the following:

last name, first name

Example: Smith, John

first name, last name

Example: John Smith

company name, article (The, A, and so on)

Example: Acme Company, The

last name, first name (company name)

Example: Smith, John (The Acme Company)

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company name, article (last name, first name)

Example: Acme Company, The (Smith, John)

If you want to file the contact in a different way, complete the following steps:

1. Open a contact.
2. Select the name you want to file the contact as from the File As drop-down list box.
3. Choose the Save and Close button to save the change.

Working with Contact Fields

Of all of the views, the card views has the most fields available. This is because of the nature of contact information. Each contact has 88 fields associated with it. The large number of fields supported by each contact makes Outlook able to compete with most contact management applications on the market today. Outlook has broken the Contact fields into several categories. Table 19.1 lists the fields available for use with the Contact's frequently used card and table views. Table 19.2 lists the Address fields. Table 19.3 contains the fax and other phone numbers fields. Miscellaneous fields are listed in Table 19.4. A variety of names are associated with each contact and are listed in Table 19.5. Table 19.6 contains all of the personal fields, and Table 19.7 lists the phone number fields.

Table 19.1   Outlook's Contact Name Fields

Assistant's Name	Home Phone
Attachment	Home Phone 2
Business Address	ISDN
Business Fax	Job Title
Business Home Page	Journal
Business Phone	Last Name
Business Phone 2	Mail Address
Callback	Mobile Phone
Car Phone	Modified
Categories	Notes
Company	Office Location

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Company Main Phone	Other Address
Country	Other Fax
Department	Pager
E-Mail	Personal Home Page
E-Mail 2	Primary Phone
E-Mail 3	Radio Phone
File As	Sensitivity
First Name	State
Full Name	Telex
Home Address	TTY/TDD Phone
Home Fax	Web Page

Table 19.2   Outlook's Contact Address Fields

Business Address	Home Address Street
Business Address City	Location
Business Address Country	Mailing Address
Business Address PO Box	Office Location
Business Address Postal Code	Other Address
Business Address State	Other Address City
Business Address Street	Other Address Country
City	Other Address PO Box
Country	Other Address Postal Code
Department	Other Address State
Home Address	Other Address Street
Home Address City	PO Box
Home Address Country	State
Home Address PO Box	Street Address
Home Address Postal Code	Zip/Postal Code
Home Address State	

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Table 19.3   Outlook's Contact Fax and Other Phone Numbers Fields

Business Fax	ISDN
Computer Network Name	Other Fax
FTP Site	Telex
Home Fax	

Table 19.4   Outlook's Contact Miscellaneous Fields

Account	Government ID Number
Assistant's Name	Organizational ID Number
Assistant's Phone	User Field 1
Computer Network Name	User Field 2
Customer ID	User Field 3
Department	User Field 4
FTP Site	

Table 19.5   Outlook's Contact Name Fields

Assistant's Name	Manager's Name
Children	Middle Name
File As	Nickname
First Name	Referred By
Full Name	Spouse
Initials	Suffix
Job Title	Title
Last Name	

Table 19.6   Outlook's Contact Personal Fields

Anniversary	Language
Birthday	Profession
Children	Referred By

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Gender   Spouse

Hobbies   Web Page

Table 19.7   Outlook's Contact Phone Number Fields

Assistant's Phone	Home Phone 2
Business Phone	Mobile Phone
Business Phone 2	Other Phone
Callback	Pager
Car Phone	Primary Phone
Company Main Phone	Radio Phone
Home Phone	TTY/TDD Phone

These fields are used by both the card and table views. There are two card views and four table views available for contacts. Three of the table views are grouped: By Category, By Company, and By Location. As with any views, you can modify them by adding and deleting fields, applying filters, grouping, and sorting. Table 19.8 lists these views and their fields.

Table 19.8   Outlook's Contact Views and Their Fields

View Name	Type	Fields
Address Cards	Cards	File As, Mailing Address, Business Phone, Company Main Phone, Home Phone, Mobile Phone, Car Phone, Other Phone, Business Fax, Home Fax, E-Mail, E-Mail 2, E-Mail 3
By Category	Table	Icon, Attachment, Full Name, Company, File As, Category, Business Phone, Business Fax, Home Phone, Mobile Phone
By Company	Table	Icon, Attachment, Full Name, Job Title, Company, File As, Department, Business Phone, Business Fax, Home Phone, Mobile Phone
By Location	Table	Icon, Attachment, Full Name, Company, File As, State, Country, Business Phone, Business Fax, Home Phone, Mobile Phone, Category

continues

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Table 19.8   Continued

View Name	Type	Fields
Detailed Address Cards	Card	File As, Full Name, Job Title, Company, Department, Business Address, Home Address, Other Address, Business Phone, Business Phone 2, Assistant's Phone, Company Main Phone, Home Phone, Home Phone 2, Mobile Phone, Car Phone, Radio Phone, Pager, Callback, Telex, TTY/TDD Phone, ISDN, Other Phone, Primary Phone, Business Phone, Home Fax, Other Fax, E-Mail, E-Mail 2, E-Mail 3, Web Page, Categories, Notes

Adding Fields to Card Views

As you can see from the above table, there is a wide variety of views, each containing numerous fields. You might want to add more fields to a view to customize it for your needs. For example, you might want to add the Web Page field to the Address Cards view. Or, you might want to add the Assistant's Phone to that same card view. To add a field to a card view, complete the following steps:

1. Select the view you want to modify from the Current View box on the Outlook toolbar or select the desired card view by choosing View, Current View.

2. Choose View menu, Show Fields to display the Show Fields dialog box (see Figure 19.2).

FIG. 19.2
Adding fields to the card views is done by using the Show Fields dialog box.

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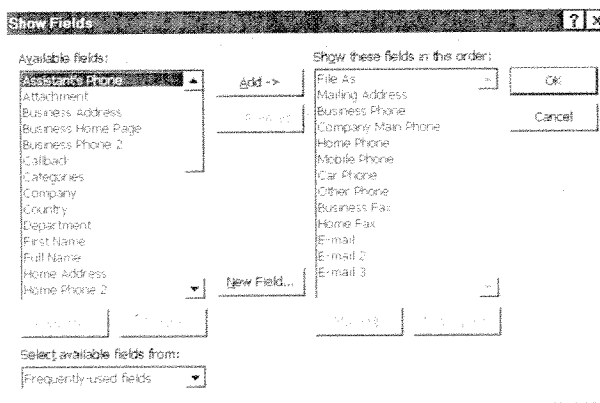
3. Select the field you want to add from the Available Fields list box. If the field you want is not listed in the Available Fields list box, select a different field set from the Select Available Fields From drop-down list box.

4. Choose Add.

5. Repeat steps 3 and 4 until all of the fields you want are added. Choose OK to add the fields to the card view.

TROUBLESHOOTING

I added a field, but I don't see it in the card view. If the field you added is empty, you will not see the field in the view. To see the field, choose View, Format View to display the Format Card View dialog box. To display empty fields, click the Show Empty Fields check box to place a check in it. Choose OK to save the change.

Deleting Fields from Card Views

The Detailed Address Cards view displays 34 fields. You might find this a little excessive. To scale this view or any card view down, delete some of its fields. You might not need to display Telex, TTY/TDD Phone, Callback, and all three E-Mail fields. To delete fields from a card view using the View menu, complete the following steps:

1. Select the view you want to modify from the Current View box on the Outlook toolbar, or select the desired card view by choosing View, Current View.

2. Choose View, Show Fields to display the Show Fields dialog box (refer to Figure 19.2).

3. Select the field you want to delete from the Show These Fields in this Order list box.

4. Choose Remove.

5. Repeat steps 3 and 4 until all of the fields you want are removed.

6. Choose OK to delete the fields from the card view.

You can also choose View, Define View to add and delete fields from the contact views. Using the Define Views for "Contacts" dialog box might be preferable if you need to define filtering, sorting, or grouping options, as well as working with fields.

Providing Detailed Information About a Contact

You are not limited to address and phone information for contacts. Outlook provides detailed information fields as well. These fields, found on the contact's Detail tab shown in

Figure 19.3, greatly expand the information you have available for each contact. To access the Details tab of a contact, open the contact and select the Details tab. These detailed fields are as follows:

FIG. 19.3
A contact's Detail tab provides an area to track additional information, such as his or her birthday.

- **Department.** Used for department name or mail stop.
- **Office.** Allows you to enter the office location name or number.
- **Profession.** This field is for entering a profession or professional organization. An example of a profession is attorney. An example of a professional organization is the American Bar Association.
- **Assistant's Name.** You can enter the contact's assistant's phone number on the General tab. To enter the assistant's name, you must go to the Details tab.
- **Manager's.** Enter the name of the contact's manager.
- **Birthday.** By entering contact birthday information, you can sort or filter on this field to get a birthday listing.
- **Anniversary.** Use this to either track wedding anniversaries or company start dates.
- **Nickname.** Use this field if a contact prefers to go by a nickname. You might want to add this field to a card view.

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Sorting and Filtering Contacts

Using Contacts, you probably have a variety of sorting and filtering requirements. Often you might need to both sort and filter a view. Let's start with some sorting suggestions:

- *By State.* Sorting by state allows you to see where most of your contacts are located.
- *Job Title.* This gives a quick listing by type of contact so that you can see all of the different types of contacts you have.
- *Full Name.* As a default, the Address Card view is sorted by File As. You might prefer to sort by full name.

Since the default setting for Contact views is to not display empty fields, you might want to create filters for them. For example, you might want to create a filter for the contacts that have a birthday entered. You'll also want to add a sort to the view to sort by birthdays. To create this view, complete the following steps:

1. Choose View, Define Views to display the Define Views for "Contacts" dialog box (see Figure 19.4).

FIG. 19.4
Use the Define Views for "Contacts" dialog box to create or modify Contact views.
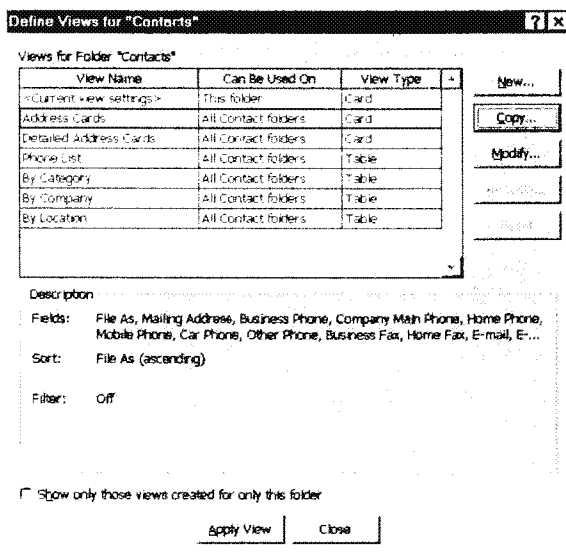
2. Select Address Cards from the Views for Folder "Contacts" list box.
3. Choose Copy to display the Copy View dialog box (see Figure 19.5).

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FIG. 19.5
The Copy View dialog
box allows you to
name the new view.
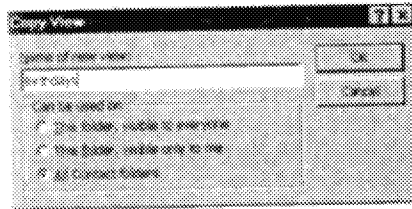
4. Type the name of the view in the Name of New View text box. An example of a name you might want to use is Birthdays.

5. Choose OK to display the View Settings dialog box as shown in Figure 19.6.

FIG. 19.6
The View Setting
dialog box allows you
to set fields, filters,
sorts, and groups for a
view.
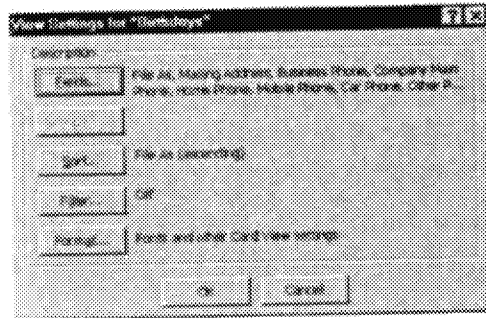
6. Choose Filter to display the Filter dialog box. Select the Advanced tab (see Figure 19.7).

FIG. 19.7
Use the Advanced tab
of the Filter dialog box
to design a filter with
criteria.

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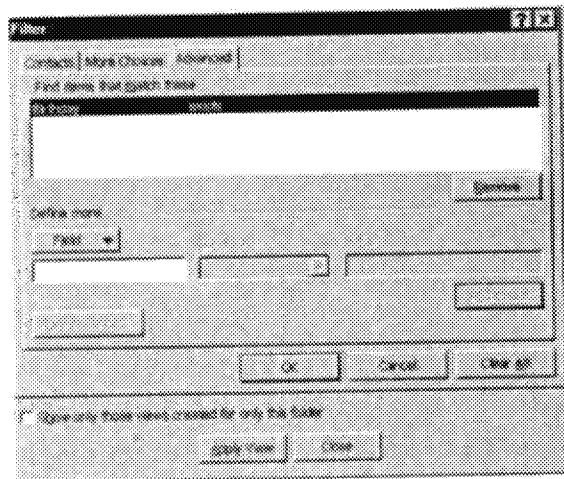
7. Choose the Field button. Select Personal Fields, Birthday from the pop-up menu.

8. From the Condition drop-down list box, select Exists.

9. Choose Add to List and choose OK to return to the View Settings dialog box.

10. Choose Sort to display the Sort dialog box (see Figure 19.8).

FIG. 19.8

Sorts are often used
in conjunction with
filters.
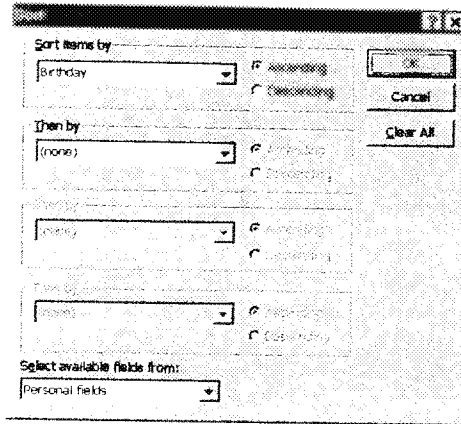
11. From the Select Available Fields From drop-down list box, select Personal Fields.

12. From the Sort Items By drop-down list box, select Birthday.

13. Click the Ascending option button.

14. Choose OK. A message box displays (see Figure 19.9) telling you the Birthday field is not shown in the view and asks you if you want to show it. Choose Yes.

FIG. 19.9

Outlook notifies you
when you sort on a
field not included in
the view.
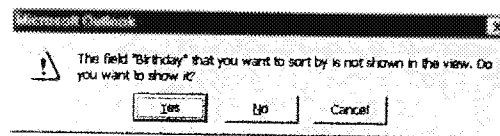
15. Choose OK to return to the Define Views dialog box. Choose Apply View to see the new view (see Figure 19.10).

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FIG. 19.10
This view is an
example of filter and
sort used together.
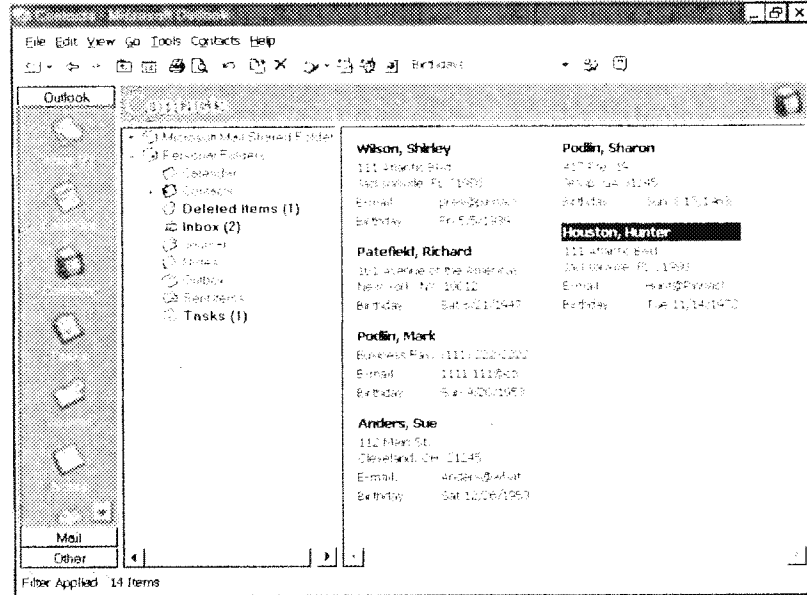
Obviously, you are not limited to this one example for filtering Contact card views. There are numerous other filters you might want to use, including the following:

Job Title. You might want to filter on a particular job title such as sales representative. Using this example, you would have all the contacts you need in order to place bids for a product you need to purchase.

Business Phone. You can create an advanced filter on Business Phone with the criterion of Is Empty to find out which contact you do not have phone numbers for.

E-mail. Create a filter with the criteria of Is Not Empty to get a listing of all contacts with e-mail addresses.

This listing of filters is just the tip of the iceberg. You can create dozens of filters of fields using the Is Empty or Is Not Empty criteria alone. Other fields are more geared to filtering based on a particular value. These fields include State, City, Zip/Postal Code, and Country.

The information you can enter for each contact is varied, giving all kinds of sorting, filtering, and reporting capabilities. Outlook easily competes with most contact management software on the market today.

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From Here...

This chapter provided you with a variety of ways to customize the Contacts view. You saw that for each contact, you can track several different phone numbers, addresses, as well as e-mail and Web information. Sorting, filtering, and grouping these views was discussed.

For detailed information about working with contacts, see Chapter 5, "Creating and Using Contacts."

For information on importing and exporting contact information, see Chapter 25, "Exporting and Importing Items."

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CHAPTER 20

Sending and Receiving Internet E-mail

by Rob Tidrow

The Internet and World Wide Web have changed the way people and businesses communicate. Many businesses and individuals rely on the Internet to communicate with employees, customers, colleagues, friends, and family. Although the Internet offers much in the way of information, entertainment, and chatting, the majority of Internet traffic is electronic mail (e-mail).

E-mail is used to send messages and files between two people, or between groups of people. In many organizations, e-mail is such an important and powerful tool that it replaces many of the old-fashioned paper memos that used to clog up workers' inboxes and lay scattered across desks. Furthermore, with the Internet's capability to reach across the country and across the world, people can stay in touch like never before using Internet e-mail.

Understanding Internet e-mail

Sending and receiving Internet e-mail is fairly simple. Setting Outlook up to handle Internet e-mail, however, may be a little difficult for those who do not have a lot of Internet experience. Some of the terms you need to know are discussed in the first section of this chapter.

Configuring the Internet Mail Information service

Microsoft Outlook's Internet Mail information service makes it easy to send, receive, and manage Internet e-mail. You are shown how to configure Outlook to use direct connection to the Internet via a local area network (LAN) and via a dial-up connection.

Using Internet mail in Outlook

This chapter concludes by showing you how to send and receive Internet mail using Outlook. If you already are familiar with sending and receiving mail messages with Outlook, you shouldn't have any problem sending and receiving them over the Internet.

Understanding Internet E-mail

Sending and receiving e-mail over the Internet is fairly easy once you configured it properly on your system. If you have never set up an Internet e-mail application, you might want to take a few moments to understand some of the basics of Internet e-mail.

The basic format of Internet e-mail is the same as the e-mail you send using the Microsoft Mail information service, which is described in detail in Chapter 9, "Receiving and Sending Microsoft Mail Messages." An Internet e-mail message comprises address lines for recipients, carbon copied recipients (CC line), blind carbon copied recipients (BCC line), a line for a subject, and an area for the body of the message. You also can attach items to the message so that you can send binary files to recipients.

The basic format of an Internet e-mail address is important to understand. If you do not enter the address correctly, your message will not be sent, or it will be sent to the wrong person. The form of an Internet e-mail address is shown in the following example:

username@domain_name

The *username* portion is the e-mail name of the recipient and is unique for that domain, which is a computer server located someplace on the Internet. A username is provided by the administrator of the domain when someone obtains an account with that domain. Typically, a username is made by taking the initial of a person's first name and combining it with the first seven letters of the person's last name. This makes a username no more than eight characters in length.

The right side of the address includes the domain name for that user. Domain names are used to represent IP addresses on the Internet, which are unique, specific addresses for each computer that connects to the Internet. Domain names usually are easy to understand, such as **whitehouse.gov**, **microsoft.com**, and so on. A domain name may have several parts to it, each separated by a period (called a *dot*), such as **que.mcp.com**. This domain name is for the Que Internet server. The *que* part denotes a computer within the *mcp* (which is short for Macmillan Computer Publishing) organization. The last part, *com*, denotes the type of organization the company or institution is. In this case, com is use to denote a commercial entity. Table 20.1 lists other common domain types.

Table 20.1   Domain Types

Domain Name	Description
com	Denotes a commercial domain.
org	Denotes an organization, such as PBS.
gov	Denotes a government institution, such as the White House.

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Domain Name	Description
mil	Denotes a military domain, such as White Sands Missile site.
edu	Denotes an educational institute, such as a college or university.
net	Denotes a network, such as an Internet Service Provider (ISP) or educational institution that services several different types of offices or businesses.

To put it all together, an e-mail address for Bill Clinton at the White House is as follows:

bclinton@whitehouse.gov

Internet e-mail addresses are not case sensitive. This means if you write **bclinton@whitehouse.gov, BCLINTON@WHITEHOUSE.GOV**, or **Bclinton@ whitehouse.gov**, the computer that routes the e-mail will know that it all goes to the same address.

Another facet of Internet e-mail is Internet e-mail standards. Standards are used by Internet and software developers to ensure that e-mail being sent from one place to another is sent to the right place. The most prevalent standard used by Internet e-mail is the Simple Mail Transfer Protocol (SMTP). Microsoft Outlook supports the SMTP standard.

SMTP is known as a simple peer-to-peer transfer protocol that works by letting host computers that want to receive Internet e-mail set up SMTP servers. (A *host* computer is the computer that processes your outgoing and incoming mail.) That host then contacts another host computer's SMTP server to send e-mail to that server. Likewise, when another host needs to send e-mail to your host (that is, the host computer that sends and receives e-mail for you), that host contacts your host and sends the mail.

Another Internet e-mail standard that Outlook supports is POP3. POP3 (Post Office Protocol version 3) is a protocol used to download spooled e-mail from a host server to your computer. (*Spooled* e-mail is mail that is waiting to be downloaded from the host computer to your computer.) POP3 enables you to have an Internet e-mail account on an ISP or company server that you dial into whenever you want, instead of being forced to always stay connected to the host computer. This protocol enables users to connect to their Internet service only once in a while to download e-mail, minimizing their online time. A typical POP3 name or IP address is written as **pop.iquest.net** or **170.203.93.5**.

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TIP As you will see when you configure Outlook's Internet Mail information service in the following section, you may need to specify both an SMTP host for outgoing mail and a POP3 host for incoming mail. This depends on how your ISP or network handles Internet e-mail. For some hosts, you need only specify a POP3 server for both outgoing and incoming e-mail.

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Before configuring Outlook for Internet e-mail, you need to find out the type of servers you use. This can be done by asking your ISP representative, or if you have an internal network connection to the Internet (for example, at work), you should ask your network administrator.

Yet another Internet e-mail standard is MIME. *MIME* (Multipurpose Internet Mail Extensions) is an e-mail standard that enables users to send extended 8-bit characters over the Internet. Regular e-mail only supports 7-bit ASCII text (such as numbers, letters, and some keyboard characters). What this means is that 7-bit ASCII messages cannot contain binary files, such as video clips, programs, sound files, and the like. Many e-mail systems support MIME messages, but not all do. Because of this, you need to make sure your recipient can handle MIME messages if you select to use MIME when sending messages with Microsoft Outlook.

If a recipient complains that he or she cannot read your message properly, you can opt not to use MIME with Outlook. Instead, your messages and attached files are then sent using UUENCODE. UUENCODE is used to convert 8-bit files into a 6-bit character file, enabling it to travel across the Internet with little or no problems. Once the message is received by the recipient, a UUDECODE application (either the e-mail application used by the recipient or a separate decoder application) decodes the file. Although the UUENCODE message may arrive at the destination without incident, the recipient may still experience problems with the file if the UUDECODE application cannot covert the file to its original binary format.

Configuring the Internet Mail Information Service

Outlook's Internet e-mail capabilities are provided by the Internet Mail information service provided on the Microsoft Outlook 97 or Microsoft Office 97 setup disks. You must first install and configure this information service before you can start sending e-mail over the Internet.

To configure Outlook to send and receive e-mail over the Internet, you need a connection to the Internet. This is accomplished usually in two ways. One way is to use a modem and common telephone line to dial-up an Internet Service Provider (ISP). An ISP is a business that sells access to the Internet to individuals and businesses. Another way is to have a direct Internet connection, such as through a network at work or through a campus-wide network at a university. Many large companies have these direct connections, which are much faster than connections you can get via a modem connection.

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The following two sections show how to set up Internet mail for a direct connection and a dial-up connection. For either scenario, you need the following information:

User name. Your full name, which is what will appear in the mail headings of each e-mail you create.

E-mail address. Your Internet e-mail address. This address is created by your ISP or network administrator.

Internet mail server. Specifies the POP3 mail server address, such as **pop.iquest.net**. If you also have an SMTP server for outgoing mail, you'll need that address as well.

Account name. Specifies your POP3 account name, such as bclinton. Sometimes an account name includes additional characters, such as bclinton1. Be sure to ask your ISP or administrator for the exact spelling of the account name, or you will not be able to log into your Internet account.

Password. Specifies your password to log into the Internet. Initially, this password usually is provided to you by the ISP. After you log on and establish a connection to your ISP, however, you usually can change the password as necessary.

IP address. For dial-up connections, you need to specify the Internet Protocol (IP) address of your ISP. An IP address looks like this: **198.70.36.70**. For most accounts, an IP address is assigned to you when you dial-up and log into the ISP. These types of IP addresses are called *dynamic IP addresses*. Ask your ISP what type of IP address you have.

DNS server. For dial-up connections, the DNS server is the name of the ISP computer on the Internet. DNS (Domain Name Service) is used to identify your computer on the Internet. A DNS name is made up of text names separated by periods, such as **bclinton.whitehouse.gov**.

When you obtain this information, write it down and keep it in a safe and secure spot. Many times, such as after you upgrade software or change computers, you may need to reconfigure your Internet mail settings. Having the preceding information written down and kept in a safe place is handy during these times.

N O T E   An alternative to accessing the Internet from an ISP is to use a commercial online service, such as CompuServe or the Microsoft Network (MSN), to access the Internet. These services provide full service access to the Internet (that is, support for Internet e-mail, World Wide Web, newsgroup, chat, and other services). The advantage of using these services is that they usually provide you with easy-to-use and easy-to-configure software to connect to the service. They also provide nationwide access points, enabling you to access e-mail and other Internet services when you are traveling and don't want to pay a toll charge to call your Internet

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continued

provider (which is usually the case when you have a local ISP that does not provide nationwide phone access services). You can find out more about other services and how Outlook supports them in Chapter 22, "Sending and Receiving E-mail from Other Services."

Connecting to an Internet Mail Server with a Direct Connection

In many companies, a network or systems administrator takes care of setting up all clients to send and receive Internet e-mail. If this is your case, count your blessings because you probably don't have to do anymore work to get Outlook set up for Internet e-mail. If, however, you have to set up a direct connection to an Internet mail server, use the following steps:

1. Start Microsoft Outlook and choose Tools, Services. This displays the Services dialog box (see Figure 20.1).

FIG. 20.1
The Services dialog box is used to set up and configure information services.
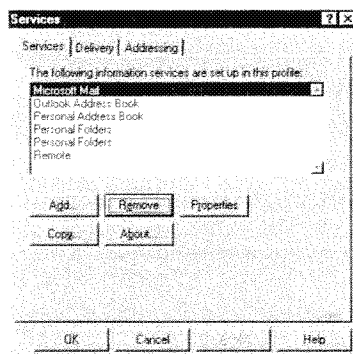
2. If the Internet Mail information service is in the list of information services, select it and click the Properties button to display the Internet Mail properties page. Skip to step 4.

   If the Internet Mail information service is not in the list of information services, click Add.

3. In the Add Service to Profile dialog box (see Figure 20.2), select Internet Mail and click OK. This displays the Internet Mail properties page.

4. On the Internet Mail properties page (see Figure 20.3), fill in the Personal Information section using the full name and e-mail address your network administrator gave you. Next, fill out the Mailbox Information section using the mail server, account name, and password information provided by your network administrator.

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TIP For a description of the type of information you need to add for each General tab section, see the preceding section, "Configuring the Internet Mail Information Service."

FIG. 20.2

Use the Add Service to Profile dialog box to add the Internet Mail service.
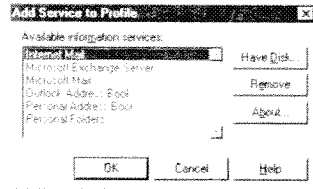
FIG. 20.3

The General tab of the Internet Mail properties page includes user name, account name, and server information.
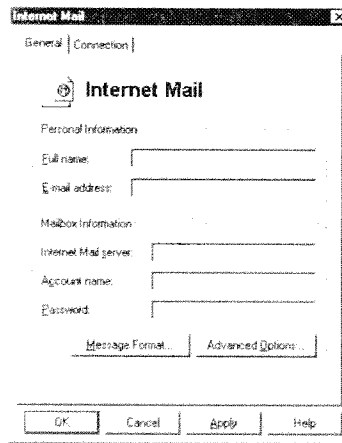
5. If your network uses a different outgoing server for Internet mail than a POP3 server (which you specify in the Internet Mail server field), click Advanced Options. In the Advanced Options dialog box (see Figure 20.4), enter the SMTP host name in the Forward All Outbound Mail to the Following Mail Server field. Click OK.

FIG. 20.4

You only need to use the Advanced Options dialog box when your outgoing mail server is different than your POP3 server.
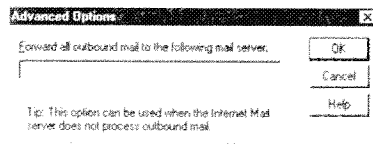
6. Click the Message Format button to display the Message Format dialog box (see Figure 20.5). This dialog box enables you to specify whether your outgoing mail messages are MIME-compliant or UUENCODE-compliant. Click the Use MIME

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When Sending Messages option if you want to use MIME for your messages. Clear this option if you want to send files using UUENCODE.

FIG. 20.5

Most users use MIME to send e-mail messages.
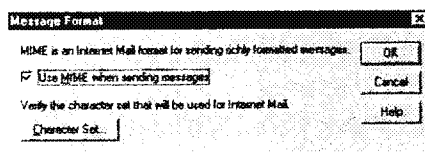
7. Click the Character Set button to display the MIME Character Set dialog box (see Figure 20.6) and to change the character set of your messages. The default for MIME is ISO 8859-1. For plain text messages you can set this to US ASCII. The other options are Norwegian and Swedish. Click OK after you set this option.

FIG. 20.6

Most users will not have to change the character set option unless they want to set the option for Norwegian or Swedish sets.
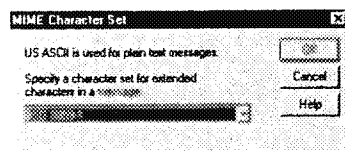
8. Click the Connection tab on the Internet Mail properties page (see Figure 20.7). Because you are setting up a direct connection to the Internet via a network, click the Connect Using the Network option.

FIG. 20.7

You specify how Outlook is to connect to the Internet using the Connection tab.

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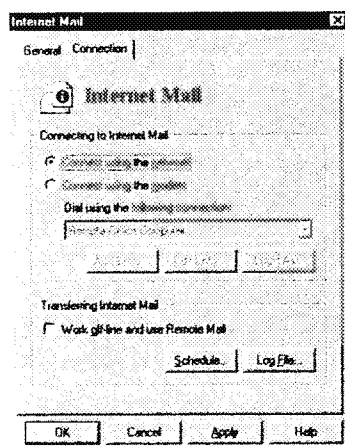
9. If you want to schedule times when Outlook checks for new messages for you on the POP3 server, click Schedule to display the Schedule dialog box (see Figure 20.8). In the Check for New Messages Every field, set a time in minutes for when you want Outlook to look for new messages. The default setting is 15 minutes. Click OK.

FIG. 20.8
You can configure Outlook to automatically check for new messages at specified time intervals.

10. To keep a log file of your e-mail events, click the Log File button on the Connection tab. This displays the Log File dialog box (see Figure 20.9). By default, the No Logging option is selected in the Specify the Level of Logging You Want drop-down box, telling Outlook not to keep a log of your e-mail events. You might want to set this option to Basic if you want to keep track of logon and logoff times and error messages. Select the Troubleshooting option in the Specify the Level of Logging You Want drop-down list if you experience problems with your e-mail. All protocol transactions are recorded in the log file so that you or your administrator can diagnose problems you may be having with your e-mail.

TIP
If you do select the Troubleshooting option in the Log File dialog box, your log file will become very large in a short period of time. To minimize the size of this log, turn on this option only when you are experiencing problems and turn it off after you fix the problem.

Also, to read a log file, open the file in a text editor, such as Notepad.

FIG. 20.9
Log files are helpful when diagnosing problems with your Internet e-mail.

To instruct where Outlook should store the log file, such as a network drive, click the Browse button and specify a file name and folder for the log file. By default, the file is named IMAIL.LOG and is stored in your Windows 95 folder. Click OK to return to the Connection tab.

11. Click OK to save your settings and to return to the Services dialog box. Outlook displays a message telling you that you'll need to exit, log off, and restart Outlook

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before the Internet Mail information service will work. Click OK to clear this message. Click OK again to clear the Services dialog box and to return to the Outlook window.

12. Choose File, Exit and Log Off to shut down Outlook and to log off. Restart Outlook to enable your Internet mail options.

To start sending and receiving Internet e-mail, read the section "Using Internet Mail In Outlook" later in this chapter. The following section shows how to set up Outlook to send and receive Internet mail via a dial-up connection.

Connecting to an Internet Mail Server by Way of a Dial-Up Connection

The other way in which you can use Outlook to send and receive Internet e-mail is by using a modem and a dial-up account. A dial-up account is what you use when you don't have a direct network connection to the Internet and you must use a modem and phone line to send and receive Internet e-mail.

To use Outlook to connect to the Internet in order to send and receive e-mail, you must install the Dial-Up Networking software in Windows 95. If you do not have this component installed on your system, use the following steps to install it:

1. Open Control Panel and double-click the Network icon. On the Configuration tab of the Network property page, click the Add button. This displays the Select Network Component Type dialog box (see Figure 20.10).

FIG. 20.10
Add an adapter component using the Select Network Component Type dialog box.
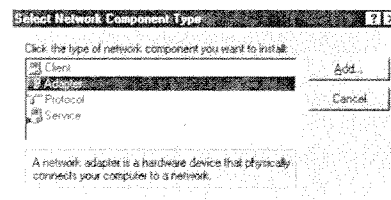
2. Select Adapter and click the Add button. The Select Network Adapters dialog box displays (see Figure 20.11).

3. Scroll down the Manufacturers list and click Microsoft. This displays Dial-Up Adapter in the Network Adapters list. Click OK. The Dial-Up Adapter component and a network protocol are added to the list of components shown on the Configuration tab. The default protocol added is NetBEUI. If you do not have the TCP/IP

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protocol installed yet, you'll need to add it as the protocol for Dial-Up Networking, as shown in the following steps.

FIG. 20.11
From the Select Network Adapters dialog box, select the Dial-Up Adapter from Microsoft.
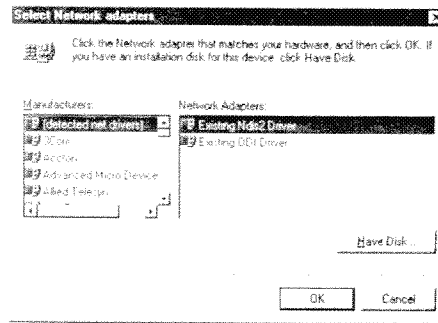
4. Click the <u>A</u>dd button on the Configuration tab of the Network property page and select Protocol from the Select Network Component Type dialog box. Click <u>A</u>dd. This displays the Select Network Protocol dialog box (see Figure 20.12).

FIG. 20.12
The Select Network Protocol dialog box is used to specify a new protocol for the Dial-Up Adapter.
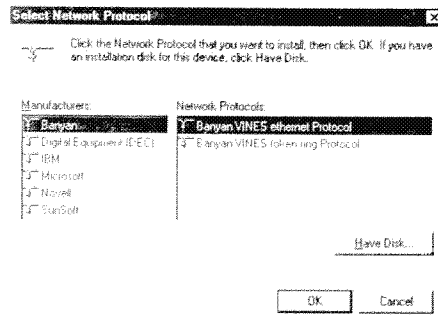
5. Select Microsoft in the <u>M</u>anufactures list and then click the TCP/IP item in the Network Protocols list. Click OK. This returns you to the Configuration tab.

6. Select the TCP/IP Dial-Up Adapter component and click the <u>P</u>roperties button. The TCP/IP Properties sheet displays (see Figure 20.13).

7. On the IP Address tab, specify how your IP address is set up. If you have a dynamic IP address, click the Obtain an IP Address Automatically option. If your ISP assigns a permanent IP to you, click the Specify an IP address option and fill in the <u>I</u>P Address field (see Figure 20.14). If your ISP also assigns you a subnet mask, which is used with your IP address to further identify which network your computer is on, fill in the S<u>u</u>bnet Mask field with that number. In many cases, your ISP does not have a subnet mask so you do not have to worry about it.

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FIG. 20.13

You must set up the Dial-Up Adapter with TCP/IP settings from your ISP.
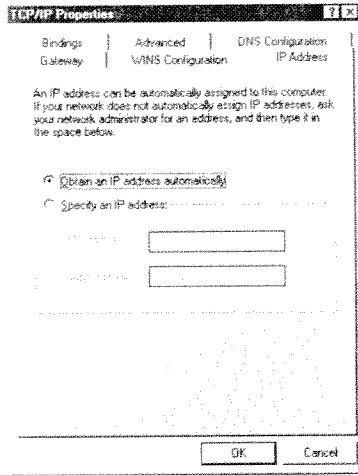
FIG. 20.14

Most users will have a dynamic IP address when they use Dial-Up Networking.
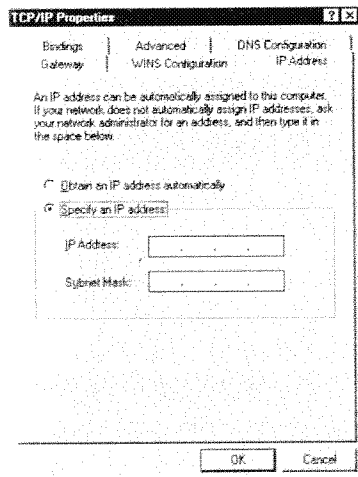
8. Click the DNS Configuration tab to set the Domain Name Service information (see Figure 20.15). Click the Enable DNS option and fill in the following options:

- *Host.* Specifies the name of your computer on the Internet. The host name is combined with the Domain name (see next item) to make up your Internet address.

- *Domain.* Specifies the domain to which your computer belongs. This is usually the domain name of your ISP, such as **iquest.net**, **aol.com**, or **att.com**.

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- *DNS Server Search Order.* Specifies the DNS server on which information about your specific computer (host) is stored. The DNS server contains a database that changes the domain name to a number so that your computer can connect to the Internet. Enter the DNS server number (which is a four-part number separated by periods, such as 190.24.36.70) in the DNS Server Search Order field and click the Add button. This adds the number to the box below the field. If you have more than one number, continue adding them.

- *Domain Suffix Search Order.* Specifies multiple domain names if your ISP has them. To locate your name in the DNS server database, a DNS server searches first for your host name. If it cannot find your host name, it then combines your host name with the domain suffixes until your name is found. In many cases, your ISP has only one domain suffix (which you list in the Domain field), so this area remains empty.

FIG. 20.15
You can obtain your DNS information from your ISP.
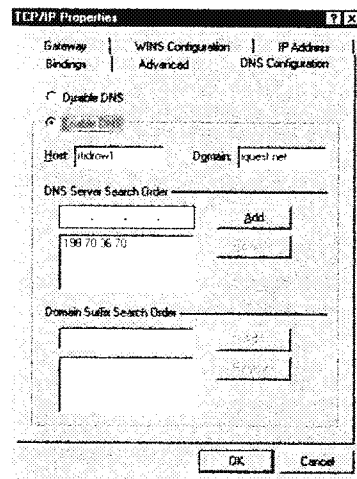
N O T E   The other tabs on the TCP/IP Properties dialog box usually do not need to be filled out for most ISPs or network. However, if your network uses the Windows Internet Naming Service (WINS) for the NetBIOS protocol, you need to obtain the primary and secondary (optional) WINS server address, scope ID, and whether the server uses DHCP (Dynamic Host Configuration Protocol) for WINS resolution. This information needs to be entered on the WINS Configuration tab. This information must be obtained from your ISP network administrator.

9. Click OK to save your settings and to return to the Network property page. Click OK.

10. When prompted to restart Windows 95, click Yes to shut down and restart Windows 95.

After Windows 95 restarts, you now need to configure a Dial-Up Networking connection for the client computer. Do this by using the following steps:

1. Double-click the My Computer icon on the client computer.

2. Double-click the Dial-Up Networking icon to display the Dial-Up Networking folder.

3. Double-click the Make New Connection icon to start the Make New Connection Wizard (see Figure 20.16). Enter a name for the connection in the Type a Name for the Computer You Are Dialing field, such as the name of your ISP.

FIG. 20.16
You should give the new Dial-Up Networking connection a name that reminds you that it is for connecting to your ISP.
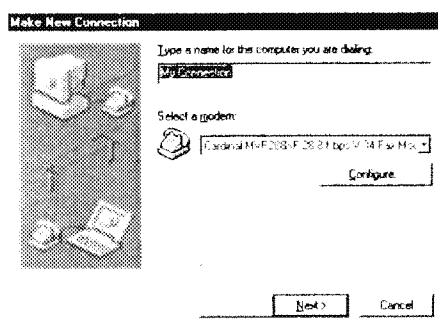
4. In the Select a Modem drop-down list, pick the modem you want to use to dial out using the new Dial-Up Networking connection. Click the Next button.

5. In the next Make New Connection screen, enter the area code and telephone number for the host computer. Click the Next button.

6. On the final Make New Connection screen, click Finish to create a new Dial-Up Networking connection. This adds a new icon for that connection in the Dial-Up Networking folder.

You now can configure Outlook to work with your new Dial-Up Networking connection to send and receive Internet e-mail. Do this by following these steps:

1. Start Microsoft Outlook. Choose Tools, Services. This displays the Services dialog box.

2. Follow the instructions shown in steps 2-7 in the preceding section, "Connecting to an Internet Mail Server by a Direct Connection." When finished with those steps, go to step 3 to configure the Connection tab.

3. Click the Connection tab (see Figure 20.17). Click the Connect Using the Modem option to specify that Outlook should use a modem to connect to the Internet. Next, click the Dial Using the Following Connection drop-down list to display the Dial-Up

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Networking connections setup on your system. Select the connection you want to use.

FIG. 20.17
Specify the Connect Using the Modem option when you want to use a dial-up connection for Internet e-mail.
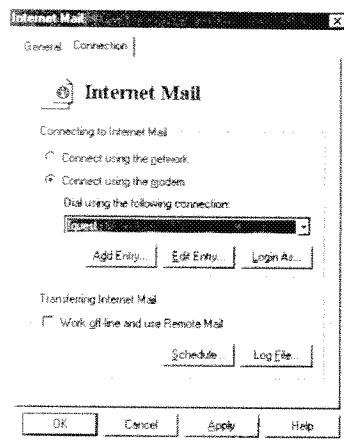
4. If you want to download only the message headers of your new mail messages, click the Work Off-line and Use Remote Mail option. Message headers contain only the Subject, From, Received, Importance, Attached, and Size fields of a message. These fields can give you a good idea as to the content of the message so that you can pick only those messages you want to download at this time.

   See "Working Remotely," **p. 622**

5. If you do not select to work offline with Internet mail, you can set the schedule for when Outlook dials your ISP and retrieves all messages from your POP3 mail host. Click Schedule to specify in minutes the interval between each time Outlook automatically dials your ISP.

6. Click the Log File button to specify options for the log file.

N O T E   You can read more about the log file in step 10 in the earlier section, "Connecting to an Internet Mail Server with a Direct Connection."

7. Click OK when you finish configuring the Connection tab. This displays a message telling you that your configuration changes will not take effect until you exit, log off, and restart Outlook. Click OK.

8. Click OK on the Services dialog box and exit, log off, and restart Outlook.

When Outlook restarts, you'll be able to start sending and receiving Internet e-mail using Outlook.

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Using Internet Mail in Outlook

Outlook does an excellent job of providing a centralized storage area for all your messages, including those you receive over the Internet. Outlook also provides a universal mail message utility that you can use for any type of e-mail you create. This includes messages you create to send over the Internet. These features make it so you don't have to stop and think about how to send or receive a message regardless of its source or target. Outlook takes care of everything.

The following two sections show how to send and receive e-mail over the Internet using Outlook.

Sending Internet Mail

The first part of sending an Internet e-mail message is creating the message. You can read about selecting your e-mail editor and creating messages in Outlook in Chapter 9, "Receiving and Sending Microsoft Mail Messages." Refer to that chapter to get a thorough discussion on creating messages to send over the Internet.

You should, however, keep some things in mind as you prepare messages for the Internet. The address format you use for Internet e-mail addresses is very strict. You learn in the earlier section "Understanding Internet E-mail" how e-mail addresses are constructed for the Internet. When you add addresses to your Contacts folder, be sure you enter the contact's e-mail address properly using the following syntax:

> *username@domain_name*

The @ symbol is critical for Internet e-mail addresses, so don't forget to insert it.

▶ **See** "Working with the Address Books," **p. 338**

Now when you address an e-mail message, you can use the e-mail address you just entered to fill in the To or Cc fields (see Figure 20.18).

T I P You can create a one-off address (which is simply an address you type in) for an e-mail recipient if you want to enter an address not currently in one of your address books, or you don't want to use an address book to enter an e-mail address. To do this, enter the e-mail address. You also can enter the protocol for the address (such as SMTP) and the full e-mail address within brackets as in the following example: **[SMTP:rtidrow@iquest.net]**.

After you create your message, click the Send button. This places your message in the Outlook Outbox folder. When you get ready to send your message (or messages if you have others waiting in the Outbox), choose Tools, Check for New Mail On. This displays the Check for New Mail On dialog box (see Figure 20.19). Select the Internet Mail option and click OK.

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FIG. 20.18

Enter the Internet
e-mail address in the
To or Cc fields.
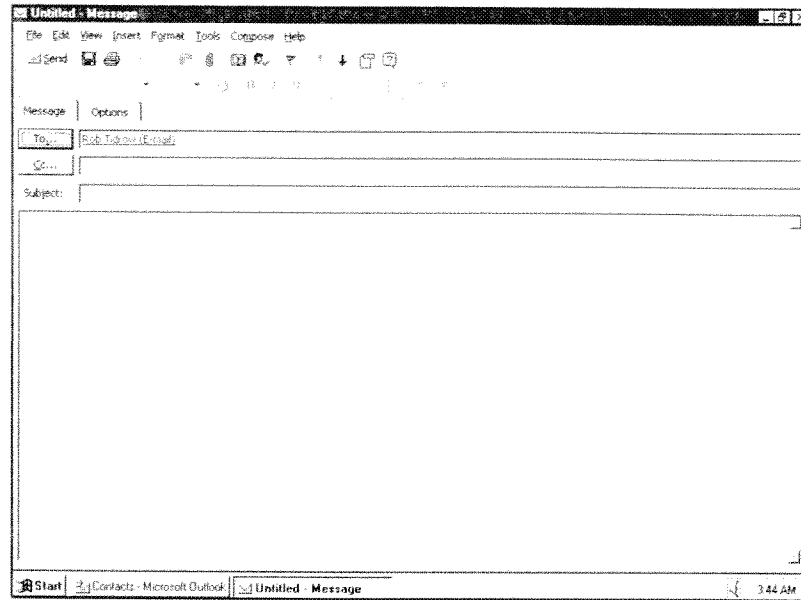
FIG. 20.19

The Check for New
Mail On dialog box
lists your e-mail
information services,
including Internet
Mail.
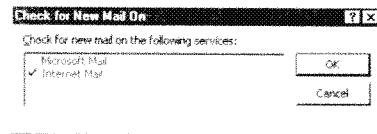
Outlook displays the Delivering Messages window, which shows you the progress of the mail being sent. If you are using Outlook with a Dial-Up Networking connection, your modem dials up your ISP and connects to the POP3 server. Messages are then sent from your Outbox to the POP3 server, to be delivered to your recipients. If you are not using a Dial-Up Networking connection to access the Internet, your outgoing mail is sent to the Internet server on your LAN. Then your message(s) is sent over the Internet depending on the schedule set up by the network administrator for your LAN. Sometimes the messages are sent out immediately. Other times the delivery times are set up to occur at scheduled intervals (such as every 30 minutes) or at specified times (such as off-peak times during the day).

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> **T I P**   If your recipient has problems reading your mail, remember to change the Message Format option
> from MIME to UUENCODE (refer to Figure 20.5). You should also restrict the type of formatting
> you use in your messages, such as not using colored text, graphics, and other rich-text formatting.

Receiving Internet Mail

When you send e-mail, Outlook also looks for any new Internet e-mail you may have on
the POP3 server or the LAN server. You can trigger to download any new messages at
any time by choosing Tools, Check for New Mail or Tools, Check for New Mail On. If you
use the former command, you need to make sure you have specified Internet Mail as the
information service you want to connect to. You can do this by first using the Tools, Check
for New Mail On command, selecting Internet Mail from the Check for New Mail On
dialog box, and clicking OK. Subsequently, Outlook knows to search for mail using the
Internet Mail information service.

How your messages are downloaded to your computer depends on how you configured
the Internet Mail properties. If you set the option to Work Off-line and Use Remote Mail
(see Figure 20.20), only message headers are downloaded to your computer. This option
should be used primarily when you use Remote Mail to connect to your Internet e-mail
server. For direct connections to the Internet, you should leave this option unchecked so
that your entire mail message downloads to your computer.

> **See** "Sending and Receiving Messages Remotely," **p. 645**

FIG. 20.20
If you see only
message headers in
your Inbox folder, you
have the off-line
option selected.
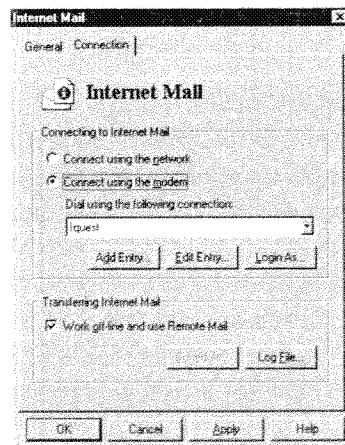
N O T E   To display the Internet Mail properties, choose Tools, Services, and double-click the Internet Mail information service. The Work Off-line and Use Remote Mail option is on the Connection tab.

From Here...

Many businesses and individuals rely on the Internet to communicate with employees, customers, colleagues, friends, and family. This chapter introduced you to some of the basics of Internet e-mail and what you need to know to connect to the Internet to send and receive e-mail. You learned how to configure Outlook to send and receive e-mail from the Internet. Finally, this chapter showed how to use Outlook to create and send messages to recipients with Internet e-mail addresses.

For related information, see the following chapters:

Chapter 22, "Sending and Receiving E-mail from Other Services," shows you how to set up Outlook to use other information services to send and receive e-mail. You are shown how to set up Microsoft Mail, Microsoft Exchange Server, Lotus cc:Mail, The Microsoft Network, and CompuServe information services.

Chapter 23, "Sending and Receiving Faxes," shows you how to set up Outlook to use the Microsoft Fax information service for sending and receiving fax messages. You also are shown how to convert a fax message to a file you can edit.

Chapter 26, "Working Remotely," describes how you can use Outlook's Remote Mail feature to send and download e-mail message remotely. You are shown how to use Remote Mail to connect to Microsoft Mail, Microsoft Exchange Server, MSN, and Internet Mail information services.

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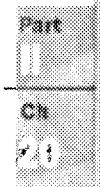
Sending and Receiving E-mail from Other Services

by Rob Tidrow

Microsoft Outlook 97 provides an advanced e-mail platform that supports several e-mail services. You can use Outlook to access e-mail on a local area network (LAN) running Microsoft Mail and Microsoft Exchange Server, access Internet e-mail, and access mail from other online services, such as the Microsoft Network (MSN) and CompuServe.

Another feature of Outlook is its capability to use Microsoft Word as its e-mail editor. This makes it possible to utilize many of Word's extended document-creation capabilities when you create e-mail messages. You can elect to use Word as your e-mail editor every time you create an e-mail message, or just use it at select times, such as when you already have Word open while editing an existing document or creating a new one. ▟

▬ **Access other information services with Outlook**

Outlook provides you with several different information services, including Internet Mail, Lotus cc:Mail, Microsoft Exchange Server, Microsoft Network (MSN), and Microsoft At Work Fax.

▬ **Add information services to a profile**

User profiles can have multiple information services installed. You are shown how to add an information service to a profile, as well as how to use the Web to find additional information services for Outlook.

▬ **Working with different information services**

You are shown how to work with some common information services, such as the Microsoft Network (MSN), cc:Mail, and CompuServe. When you use Outlook with online services, you install a MAPI (Mail Application Programming Interface) transport driver for that online service. Microsoft and other vendors are releasing these transport drivers.

Understanding How Outlook Communicates with Other Services

Microsoft Outlook includes the capability to communicate with other information services that are MAPI-compliant. MAPI (Mail Application Programming Interface) is a programming environment that enables developers to create e-mail and messaging applications to work with Microsoft's line of messaging products. The MAPI architecture defines the client applications, client interfaces, and service providers.

Many third-party application developers create MAPI-compliant applications to work with Microsoft messaging programs. Currently, the number of MAPI applications for Microsoft Outlook is limited, but this number should increase after Outlook is on the market for a little while. You should eventually see applications that enable you to connect to many different e-mail services, such as CompuServe, America Online, and other services.

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You can find more information about MAPI on the Microsoft Web site devoted to MAPI. Point your World Wide Web browser to **http://www.microsoft.com/msdn/sdk/** and click the Search hyperlink. When the Microsoft Search page displays, enter the term **MAPI** in the I Want to Search For field and click the Search Now button. This displays a Search Results page, from which you can select a number of Web pages devoted to MAPI.

One way Outlook works with another information service is the way it can interoperate with Microsoft Exchange Server, Microsoft's successor to Microsoft Mail. When users upgrade to Outlook on an Exchange Server network, they can eliminate the Exchange Client on their computer and use Outlook instead. All features available to the user with Exchange Server Client are supported by Outlook. In addition, Outlook has new capabilities including integrated calendar functions, extended printing features, customizable views, and more. You learn more about using Outlook with Microsoft Exchange Server later in this chapter in the section called "Working with Exchange Server 4.0."

Another information service supported by Outlook is Microsoft Mail 3.x. Microsoft Mail 3.x is a popular e-mail environment for many Windows and MS-DOS users. Because Microsoft Mail is a component of Microsoft Windows for Workgroups 3.x, Windows NT 3.x, Windows 95, and Microsoft LAN Manager, many businesses and organizations have settled on it as their primary e-mail system. Because of this, when users or sites upgrade to Outlook, they may want to keep their Microsoft Mail infrastructure (such as postoffice and user profiles) and use Outlook as their e-mail client. They can do this quite easily by simply installing Outlook and configuring the Microsoft Mail information service to work with the established Microsoft Mail network. The downside to using the Microsoft Mail network, however, is that there are some limitations. This is because Outlook is

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specifically designed to work with Exchange Server. Therefore, you may expect some limitations: You cannot access another user's e-mail folder, digital signatures and encryption features are not included, and public folders are not supported.

To use Outlook with other information services, you need to install software for that information service and configure it for a user profile. You can have one or all information services installed if you like, making Outlook a "universal inbox." Each information service includes settings that enable you to send, store, and retrieve messages over that service by using Outlook. The next section shows how to add information services to an Outlook profile.

Adding Information Services to a Profile

Information services are added to a Microsoft Outlook profile to enable you to access that information service. If you use Microsoft Mail on a local area network, for instance, you install the Microsoft Mail information service for the profile you are using. You then configure the information service to work with your network, as well as configure the information service for personal preferences.

Outlook includes the following information services:

> Microsoft Mail
>
> Microsoft Exchange Server
>
> Internet Mail
>
> Lotus cc:Mail
>
> Microsoft Network (MSN)
>
> Microsoft At Work Fax

To add an information service to a profile, use the following steps:

1. Start Outlook. Choose Tools, Services to display the Services dialog box (see Figure 22.1).

2. Click the Add button to display the Add Services to Profile dialog box (see Figure 22.2).

TIP To add an information service to a different profile, you must select that profile in Microsoft Outlook Properties page. These are not the properties you see when you choose File, Properties from the Outlook main window. Instead, open Windows Control Panel and double-click the Mail icon (this may be Mail and Fax if Microsoft Fax is installed as well). On the Services tab, click the Show Profiles button to display the Mail page (or Mail and Fax page), as shown in Figure 22.3. Click the profile to which you want to add the information service and click the Properties button. This displays the same dialog box shown in Figure 22.1. Follow steps 1 and 2 and continue from there.

FIG. 22.1

The Services dialog
box is used to add or
modify information
services.
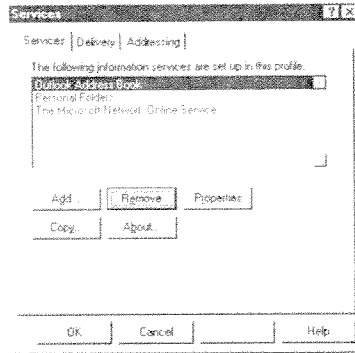
FIG. 22.2

You add the new
information service to
your current profile.
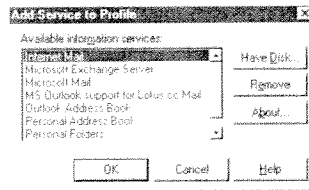
FIG. 22.3

To change to a
different profile, you
must open the Mail or
Mail and Fax property
page and click the
Show Profiles button.
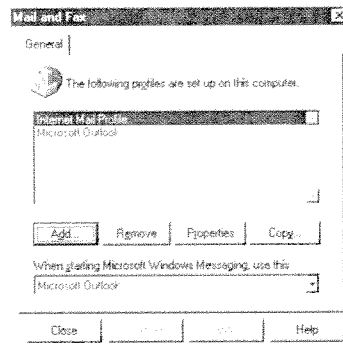
3. Click the information service you want to add in the Available Information Services
    list. Click OK to add this service.

    If the service you want to add is not in this list, click the Have Disk button and enter
    the path to the information service file you want to add in the Install Other Informa-
    tion Service dialog box (see Figure 22.4). Click OK to add this service.

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FIG. 22.4

You use the Install
Other Information
Service dialog box to
specify an information
service not provided
by Outlook 97
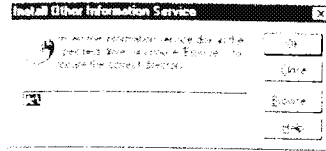
4. Fill out the configuration information for that information service if a dialog box or property page for that service displays. Each information service requires specific configuration for that service. Showing all the possible configuration settings here is impossible. However, you can read about configuring specific information services later in this chapter. In Figure 22.5, for example, the Microsoft Exchange Server property page displays. You can configure the Exchange Server information service for the current client. (For information on configuring this option, see the section "Working with Exchange Server" later in this chapter.)

> **See** "Configuring the Internet Mail Information Service," **p. 462**
> **See** "Working with Exchange Server 4.0," **p. 528**
> **See** "Working with Lotus cc:Mail Messages," **p. 525**

FIG. 22.5

You configure the new
information service
after you install it.
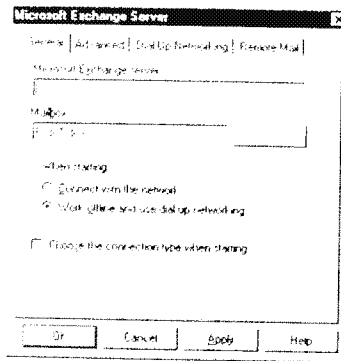
TIP The configuration information that displays for each information service depends solely on the information service you install. For detailed information on installing the Internet Mail information service, see Chapter 20, "Sending and Receiving Internet E-mail." For configuring the Lotus cc:Mail information service, see the section "Working with Lotus cc:Mail Messages," later in this chapter.

5. Click OK after you configure the information service. Notice the new information service is added to the Services dialog box (see Figure 22.6).

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FIG. 22.6

Your new information service is added to the list of information services installed on the profile.
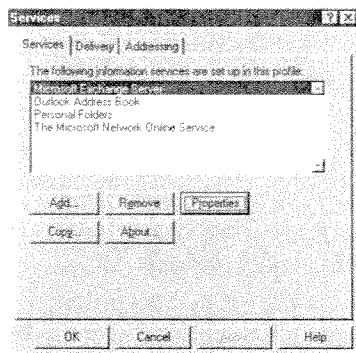
6. Click OK again to close the Service dialog box.

Your new information service will not be active until you exit, log off, and restart Outlook.

> **TIP** You can download additional information services from the World Wide Web by selecting Help, Microsoft on the Web, Free Stuff from Outlook. As information services become available, Microsoft will add them to this Web page for you to download.

Using Word as Your E-mail Editor

Microsoft Outlook can be configured to use Microsoft Word as its e-mail editor. When you configure Outlook in this way, Word is activated when you create, read, or reply to a message in Outlook. The window that displays is similar to the one shown in Figure 22.7.

FIG. 22.7

Word offers some advantages over Outlook's message creator, including advanced editing tools.

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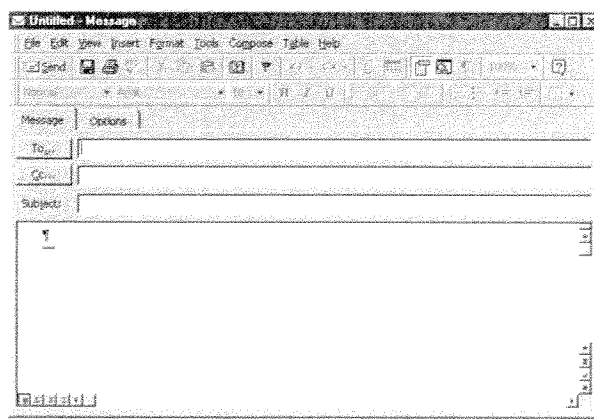
N O T E   The term WordMail is often used to describe the editor when you use Word as your e-mail editor. Microsoft uses both WordMail and Word when describing the editor. In this chapter, WordMail is used.

One reason for choosing WordMail over Outlook's regular e-mail message tool is that WordMail offers you more tools and options from which to choose when creating messages. Some of these items are highlighted in the following list:

- *Formatting tools.* You can use WordMail's text-enhancement tools, such as italics, bold, strikethrough, and underline. Further, you can use WordMail's formatting features to add borders, shading, and automatic numbering to your messages.

- *Templates.* You can use WordMail's ten e-mail templates designed in various themes to compose specific e-mail messages to recipients.

- *AutoCorrect.* Use WordMail's AutoCorrect feature to automatically correct typographical errors as you compose a message.

- *Tables.* With WordMail, you can add tables to your e-mail messages to format the layout of text or numbers.

- *Document Mapping.* You can use WordMail's Document Mapping feature to organize and hyperlink threaded messages.

- *Page Layout view.* Although e-mail messages are not intended to be the most attractive documents in the company, you may want to use WordMail's Page Layout feature to view your message before sending it.

- *Spelling, Thesaurus, and Grammar tools.* You can use these tools to check your e-mail message for spelling and grammatical errors. Also, look up substitutions for words using the Thesaurus utility.

- *Objects.* WordMail enables you to embed objects such as pictures, Excel charts, and audio files to your messages.

Another reason for using Word as your e-mail editor is if the majority of your company, division, or workgroup uses WordMail. This way you can take advantage of WordMail's editing features to call attention to certain ideas or dates. You might, for instance, enclose an important marketing idea in a shaded box. Then when your recipient(s) read the message, this idea is easily noticed and is not lost within the rest of the message text (see Figure 22.8).

You might also use WordMail's revision labels to help you keep track of changes made to a message. Let's say, for example, that your team is responsible for updating company training policies and you are compiling an agenda for the first meeting. Instead of walking around or calling everyone on the team to get the agenda worked out, create a WordMail

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message with the proposed agenda and send it around to each team member. As a team member adds comments to the message, you can see who makes each revision and when it was done (see Figure 22.9). You then can compile the final agenda and distribute it via e-mail as well.

FIG. 22.8

WordMail makes it easy to call attention to important information in a message.

Date: July 1, 1997
Place: Hyatt Regency, Suite 243
Time: 1:30-3:30
RE: Budget for fiscal '98
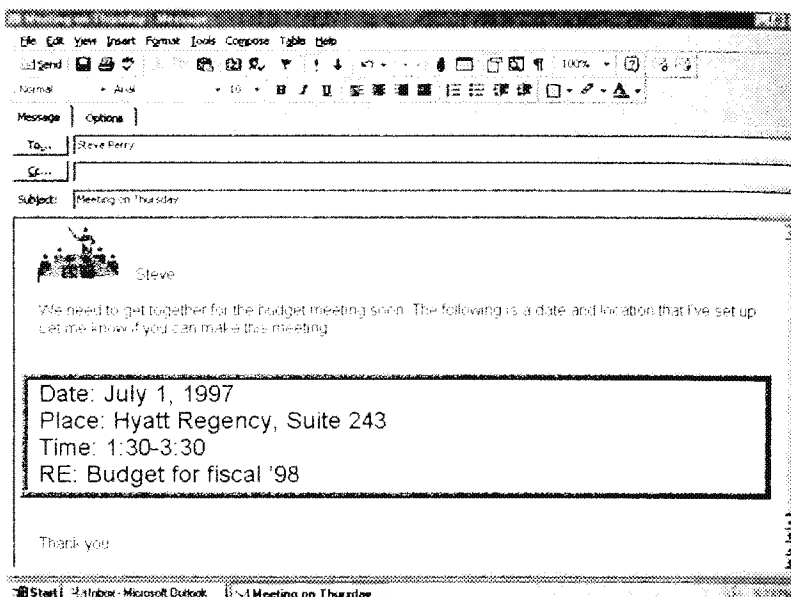
FIG. 22.9

WordMail enables you to keep track of changes made to messages.
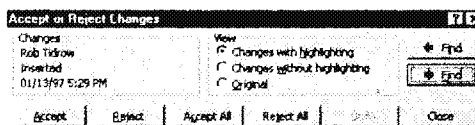
The first time you use Microsoft Outlook and when Microsoft Word is already installed on your system, you are given the opportunity to turn on Word as your e-mail editor (see Figure 22.10). If you click Yes here, then the following steps should not be used—you already have Word set up as your default e-mail editor. If you click No, however, then use the following steps to set up Word as your e-mail editor:

1. In Outlook, choose Tools, Options, to display the Options page.
2. Click the E-mail tab, if it is not already showing (see Figure 22.11).

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FIG. 22.10
The first time you use
Outlook, you have the
option of turning on
Word as your e-mail
editor.
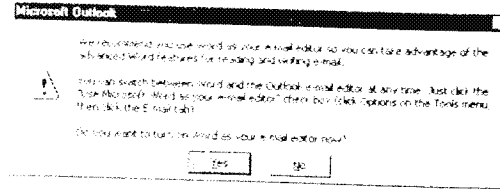
FIG. 22.11
The E-mail tab
includes several items
for how Outlook
handles e-mail,
including activating
WordMail.
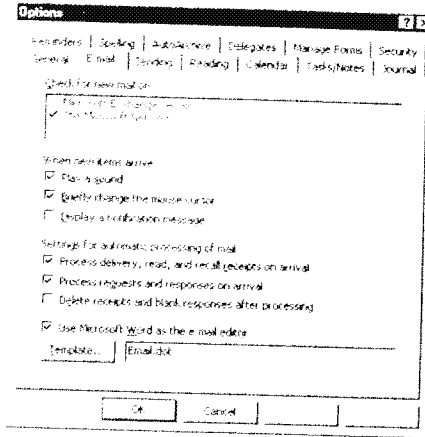
3. Click the Use Microsoft Word as the E-mail Editor option, which appears near the bottom of the tab.

4. Click OK, to save your setting and to return to Outlook.

Now, when you click the New Mail Message button on the Outlook toolbar or select Compose, New Mail Message, WordMail displays on your screen. To use WordMail, see Chapter 9, "Receiving and Sending Microsoft Mail Messages." This chapter shows how to create new messages and to send them.

See "Choosing an E-mail Editor" **p. 204**

Before you finish reading about WordMail, you should be aware of some of the disadvantages to using WordMail with Outlook. One of these is speed and performance. When you use WordMail, the performance of your computer may suffer some if you do not have a fast processor and a lot of memory installed. This is because Outlook and much of Word are both running on your system when you create or edit a message in WordMail. For this reason, you'll want at least 16M of RAM (Random Access Memory) installed on your computer and have a fast processor (such as a 100Mhz or higher Pentium processor) if you decide to use WordMail.

Another problem with using Word as your e-mail editor is that some messages may not display correctly in other e-mail systems. You can still use WordMail even if your recipient doesn't use Word with Outlook or have Word installed. The recipient's message, however, will not appear exactly as you created it. In fact, some of the text, text formatting (such as highlighting, italics, and so on), and any special borders you place in the message will not show up in the recipient's message. For example, bulleted lists in your messages usually appear in the recipient message, but the bullets are converted to round bullets. Further, objects embedded in messages tend to be left out of recipient messages altogether, if Word is not used as your recipient's e-mail editor.

> **TIP** Users sending e-mail over the Internet also may experience some problems when messages are created using WordMail. When you send a rich-text formatted message from Outlook to an Internet e-mail recipient, make sure the MIME option is selected for the message format. You can do this in Outlook by selecting Tools, Services, and double-clicking Internet Mail from the Services page. Next, click the Message Format button and make sure the Use MIME When Sending Messages option is selected. Click OK three times to save your settings.

Working with the Microsoft Network

The Microsoft Network (MSN) is an online service created and operated by Microsoft. At the time of this writing, Microsoft was at the tail of a massive overhaul to the MSN service. Instead of operating a proprietary network (such as CompuServe or America Online), MSN has all its content and services available on the World Wide Web. This makes it convenient for users to connect to MSN and still have all the Internet resources available.

To use Outlook to send and receive mail over MSN, you must obtain the MSN free software CD-ROM. You can obtain this by contacting MSN on the World Wide Web at **http://www.msn.com/freemsn/default.asp**. This CD-ROM includes the Network Premier Membership CD software to connect you to the Internet version of MSN.

> **TIP** The new MSN software requires about 50M of hard disk space and takes about 30 minutes to fully install. Before installing the software, you should make sure you have enough space on your hard drive for these files to fit.

Follow the installation instructions provided with the MSN software to install the MSN software on your hard disk and to become a member of MSN. With MSN, you have a host of services available to you, including World Wide Web navigating, chat room

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participation, e-mail, Internet News services, and more. The topic of using MSN is for another book (you might want to purchase Que's *Platinum Edition Using Windows 95* for more information on MSN), but the following steps show how to set up Microsoft Outlook to send and receive e-mail over MSN.

1. After installing MSN, open Microsoft Outlook. Choose Tools, Services, to display the Services dialog box.

2. In the list of information services, select The Microsoft Network Online Service option (see Figure 22.12). Click the Properties button.

FIG. 22.12
The MSN software adds the Microsoft Online Service information service to Outlook automatically.
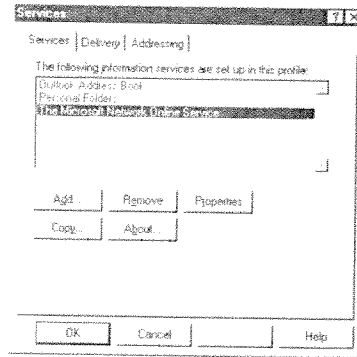
3. On The Microsoft Network property page (see Figure 22.13), configure the following options on the Transport tab:

FIG. 22.13
The Microsoft Network property page enables you to set how Outlook downloads e-mail from your MSN account.
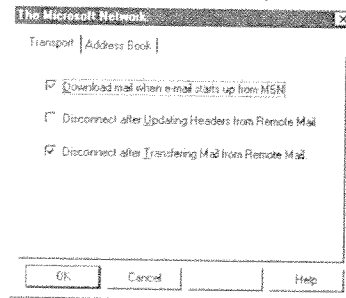
- *Download Mail When E-mail Starts up from MSN.* Instructs Outlook to automatically download your e-mail messages from MSN when you connect to it.

- *Disconnect After Updating Headers from Remote Mail.* Instructs Outlook to download message header text from your new messages and then disconnect from MSN. This enables you to review the message headers and decide which messages you want to download.

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- *Disconnect After Transferring Mail from Remote Mail.* Instructs Outlook to connect to MSN, download all your e-mail messages, and then disconnect from MSN.

4. Click the Address Book tab and select the Connect to MSN to Check Names option (see Figure 22.14) if you want Outlook to check the MSN address book to verify e-mail addresses in outgoing messages. You should leave this option clear if you plan to compose e-mail messages to MSN recipients while offline. Otherwise, you'll need to connect to MSN each time an e-mail address needs verified.

FIG. 22.14

If you compose messages while online, select to have Outlook verify addresses while connected to MSN.
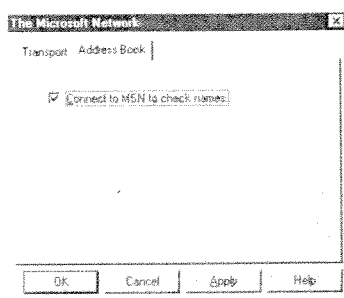
5. Click OK to save your changes and return to the Services dialog box. Click OK to return to Outlook. Your settings won't be effective until you exit, log off, and restart Microsoft Outlook.

To send and receive MSN e-mail messages with Outlook, follow these steps:

1. Start Outlook and choose Tools, Check for New Mail On. This displays Check for New Mail On dialog box (see Figure 22.15).

FIG. 22.15

You select the service you want Outlook to check new mail on.
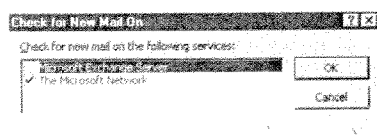
2. Make sure The Microsoft Network option is checked, and click OK. The Delivering Messages message box displays.

3. When the Sign In dialog box for MSN displays (see Figure 22.16), enter your Member ID and Password in their respective fields. Click Connect. For the Sign In dialog box to remember your password for future login sessions, check the Remember My Password option.

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FIG. 22.16
The Sign In dialog box
is used to initiate the
login process to MSN

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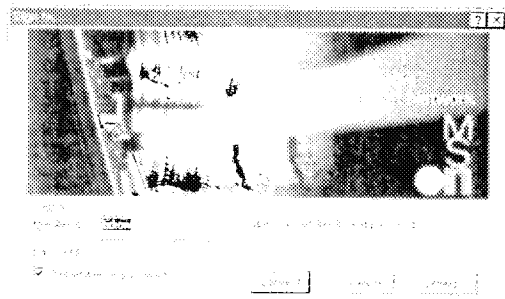
1. Click Connect. This dials MSN and logs you into the MSN service. Depending on the options you selected when filling out The Microsoft Network property page, Outlook sends any outgoing mail, and then downloads your new messages, or downloads just your new message headers.

5. After Outlook sends and retrieves your messages, it automatically disconnects from MSN if you selected the Disconnect After Transferring Mail from Remote Mail option in The Microsoft Network property page.

You now can return to Outlook and read your new mail messages.

N O T E Many users want to connect to MSN via a LAN connection. This not only allows them to free up their modem for other online tasks; the LAN to Internet connection is far faster than modem connections. To connect your LAN to MSN, you need to have an Internet connection that supports the MSN Membership System protocol. This protocol is currently supported to router-based and remote Winsock-based Internet connections. LANs configured with an HTTP (Hypertext Transport Protocol) proxy server do not support this feature now, but there should be support for it soon from Microsoft or third-party vendors.

To get more information about this feature, you can call the MSN technical support line at 206-635-7019.

Working with Lotus cc:Mail Messages

You can use Outlook to send and retrieve messages over a Lotus cc:Mail network. When you do this, Outlook replaces the cc:Mail mail client on your computer. This is handy if you want to keep all your correspondence, faxes, messages, notes, and e-mail in one place. Instead of having separate applications for e-mail, faxing, and scheduling, you can use Outlook to handle all these services for you.

To set up Outlook for cc:Mail, you need to have a cc:Mail network installed and running on your computer. If you don't already, you'll need to refer to the Lotus cc:Mail documentation or talk to your system administrator. The following steps assume you have cc:Mail running on your computer already:

1. On the Microsoft Office 97 CD-ROM, open the folder named VALUPACK\CCMAIL.

2. Double-click the file named CCMAILSP.EXE. If you use Windows NT, double-click the file named CCMAILNT.EXE.

3. When the message box displays letting you know that you are about to install the Outlook support for Lotus cc:Mail (see Figure 22.17), click Yes.

FIG. 22.17

Windows informs you that you are about to install the cc:Mail information service files.
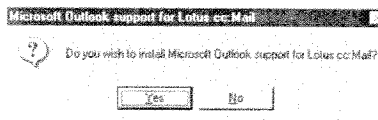
4. Read the End-User Licensing dialog box, and click Yes if you agree with the information. The cc:Mail information service files are installed on your computer.

5. Click OK when the Microsoft Outlook Support for Lotus cc:Mail message box displays.

You now need to configure Outlook to use the cc:Mail information service for sending and receiving e-mail. Follow these steps:

1. Start Outlook, if it is not already. Choose Tools, Services to display the Services dialog box.

2. Click the Add button to display the Add To Services dialog box.

3. Select the MS Outlook support for Lotus cc:Mail item from the Available Information Services list box (see Figure 22.18).

FIG. 22.18

The MS Outlook support for Lotus cc:Mail item appears after you install the CCMAILSP.EXE file.
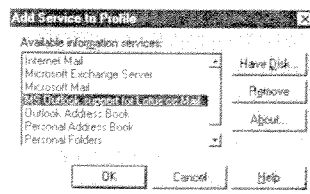
4. Click OK. The cc:Mail information service attempts to find the path to the cc:Mail Program directory, which contains the VIM.DLL file. If the cc:Mail information

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service does not locate the file, or you are not currently logged into the network, the cc:Mail Service dialog box appears (see Figure 22.19). Click the Find It Now button to instruct Outlook to let you enter the path to the VIM.DLL file. Click OK after you enter the path.

FIG. 22.19
If you do not know the path to the cc:Mail Program directory, consult your system administrator.
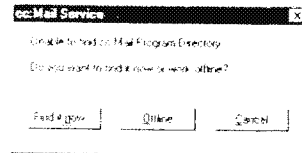
Or, if you are not connected to the cc:Mail network, click the Offline button to work offline. When you do this, click OK when a message displays letting you know that operation could not be completed. This returns you to the Service dialog box.

5. Click OK to save your settings.

6. Exit, log off, and restart Outlook.

You now can use Outlook to create, send, and retrieve messages from a cc:Mail network. Outlook adds a new menu item for cc:Mail to the Tools menu. This item, called cc:Mail Service Tools (see Figure 22.20), includes the options for updating and importing cc:Mail bulletin boards, importing cc:Mail folders, updating your local copy of the cc:Mail address book, and importing cc:Mail private lists to your personal address book.

FIG. 22.20
After configuring the cc:Mail information service, Outlook adds the cc:Mail Service Tools menu item to the Tools menu.

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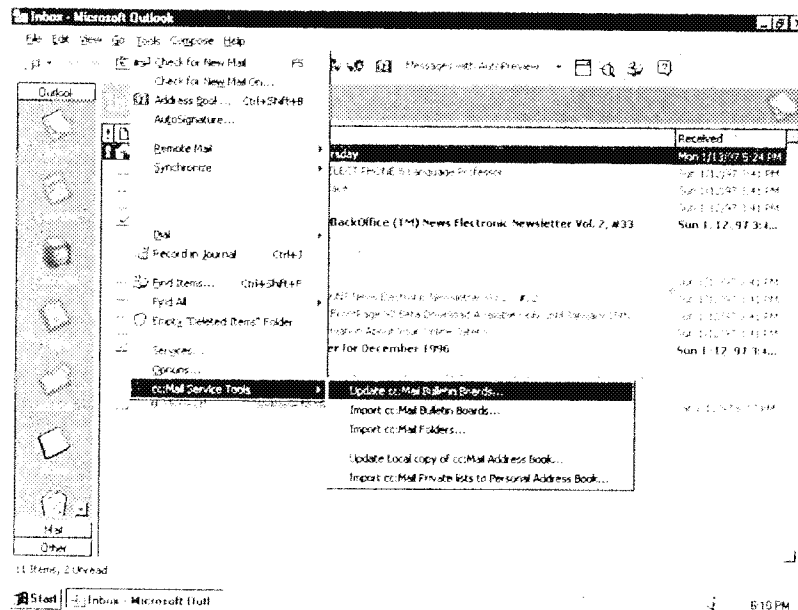
Working with Exchange Server 4.0

Many users will use Outlook as a client to the Microsoft Exchange Server. If you are already using the Microsoft Exchange Client, you can completely replace it with Outlook and not lose any e-mail or scheduling configuration settings with Outlook. On the other hand, users who still use the Microsoft Exchange Client may not be able to see all of the features of an Outlook message. The best scenario for a company that standardizes on Exchange Server and Outlook is to upgrade all users to Outlook and remove the Exchange Client from their systems. This way, all users can take advantage of all the features of Outlook.

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Some of the Exchange Client limitations discussed in this section may be eliminated when Microsoft releases Microsoft Exchange Server 5.0, scheduled for a Spring 1997 release. You can find more information about Exchange Server 5.0 by visiting the Exchange Server Web site at:

http://www.microsoft.com/exchange

The first step to upgrading Outlook on an Exchange Server is to install Outlook on your client computer (see Appendix A, "Installing Outlook"). Next, you need to install and configure the Microsoft Exchange Server information service to work with Outlook. You are shown how to do this in the following steps:

1. In Outlook, choose Tools, Services, to display the Services dialog box.
2. Click the Add button to display the Add Service to Profile dialog box.
3. Select the Microsoft Exchange Server option in the list of information services. Click OK.

TIP If Microsoft Exchange Server is not showing in the list of information services, you may need to install the Exchange Extensions add-in.

4. On the Microsoft Exchange Server page (see Figure 22.21), click the General tab if it is not already showing. Set the following options:.
   - *Microsoft Exchange Server.* Specify the Exchange Server server name your mailbox is on. You may need to ask your system administrator for this information.
   - *Mailbox.* Specify your mailbox name. You can click the Check Name button to have Outlook verify your mailbox name on the server.
   - *Connect with the Network.* Click this option if you connect to the Exchange Server server over a local area network.

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Working with Exchange Server 4.0 | 529

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FIG. 22.21

The General tab includes server and mailbox settings for your Exchange Server configuration.
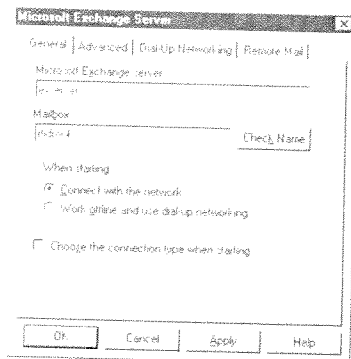
● *Work Offline and Use Dial-up Networking.* Click this option if you connect to the Exchange server via a Dial-Up Networking connection.

● *Choose the Connection Type When Starting.* Click this option if you want to specify your connection type to the Exchange server when you start Outlook. This is handy if you use a laptop that is used in both office and mobile situations.

Click Apply for these settings to be saved.

5. Click the Advanced tab (see Figure 22.22) and set the following options:

FIG. 22.22

You can specify additional Exchange Server mailboxes to access with Outlook, and security and encryption settings with the Advanced tab.
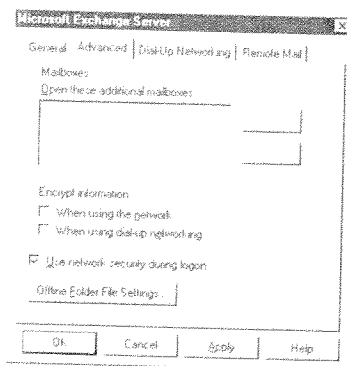
● *Open These Additional Mailboxes.* Enables you to specify additional mailboxes that you want to open. You must have delegate access permission assigned to open these mailboxes. Click the Add button to add additional mailboxes. This button is not available if you have not specified your mailbox name and clicked the Check Name button on the General tab (see step 4 for more information). Also, the Add button is not available if you check the Work Offline and Use Dial-up Networking option on the General tab.

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- *When Using the Network.* Specifies that you want to use encryption settings when you send messages over the network.

- *When Using Dial-up Networking.* Specifies that you want to enable encryption settings when you send messages via a Dial-Up Networking connection.

- *Use Network Security During Logon.* Specifies that you want to log on to Outlook using the same network identification that you use to log on to the network. Clear this option to ensure that Outlook prompts you to enter a password when you start Outlook.

- *Offline Folder File Settings.* Enables you to specify the location of the offline folder file. Click this button to display the Offline Folder File Settings dialog box (see Figure 22.23). In this dialog box, you can set the following options. Click OK after you set these options to return to the Advanced tab:

FIG. 22.23

You can specify offline folder file options when configuring the Exchange Server information service.
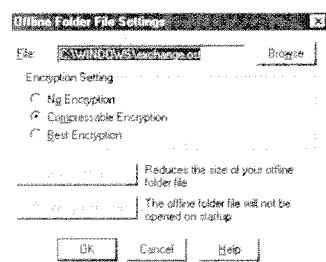
- *File.* Specify the path and file name to an offline folder file you want to use.

- *Encryption Setting.* You can specify the degree to which Outlook encodes information in the specified offline folder. The No Encryption option is used when you do not want to encode your offline folder file. Use the Compressable Encryption option to create encoded files that can be compressed by a compression application. The Compressable Encryption option does provide some encryption, but should not be used if you want the maximum file encryption that the information service can provide. Use the Best Encryption option to create encoded files that have the highest degree of encryption.

- *Compact Now.* Enables you to compact the size of your offline file, reducing its size.

- *Disable Offline Use.* Specifies that Outlook should not open the offline folder when Outlook starts up. Use this option if you have no need for a synchronized copy of your mailbox stored on your local drive.

Click Apply for these settings to be saved.

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6. Click the Dial-Up Networking tab (see Figure 22.24), if you want to set up options for connecting to Exchange Server via a dial-up connection. Set the following options:

FIG. 22.24
You don't need to set Dial-Up Networking options if you do not plan to connect to Exchange Server with a dial-up connection.
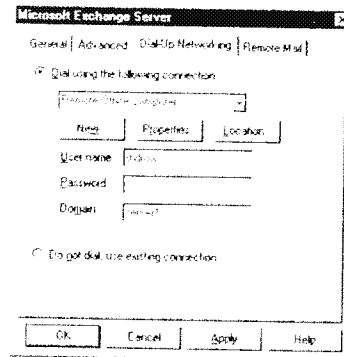
- *Dial Using the Following Connection.* Specify the Dial-Up Networking connection you want Outlook to use to connect to Exchange Server. Click the New button to create a new connection; click the Properties button to modify the properties of a connection, and click the Location button to modify the Dialing Properties settings for your local machine.
- *User Name.* Enter your user name for the Exchange Server to which you want to connect.
- *Password.* Enter your password for the Exchange Server to which you want to connect.
- *Domain.* Enter your domain name for the Exchange Server to which you want to connect. You may need to obtain this from your system administrator.
- *Do Not Dial, Use Existing Connection.* Use this option if you are already connected to the Exchange Server and you do not want Outlook to dial the server. This is useful if you need to change any of the preceding three options while connected to the server.

Click Apply for these settings to be saved.

7. Click the Remote Mail tab (see Figure 22.25) if you want to connect to the Exchange Server using Remote Mail. Set the following options:
- *Process Marked Items.* Sends and retrieves e-mail items you have marked when you connect to the Exchange Server.

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FIG. 22.25
Outlook includes
several handy features
for sending and
retrieving e-mail
remotely.
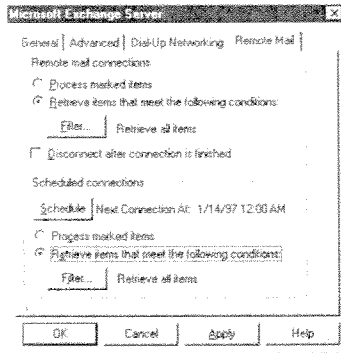
- *Retrieve Items that Meet the Following Conditions.* Specifies the e-mail messages you want to receive. You must click the Filter button to set filtering conditions (see Figure 22.26). In the Filter dialog box, you can set Outlook to retrieve items only sent by specific users, only sent to you, that are copied (cc'd) to you, or that have a specific subject. You also can click the Advanced button to display the Advanced dialog box (see Figure 22.27). This dialog box lets you set filtering criteria based on message size, read condition, dates sent, and priority level. Click OK twice after you specify filtering settings.

FIG. 22.26
To receive only those
messages that meet
specific conditions, fill
out the Filter dialog
box.
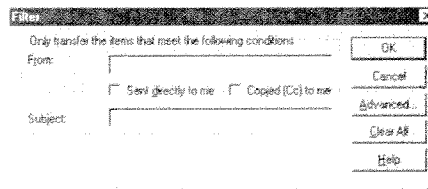
FIG. 22.27
To further restrict or
control the messages
downloaded to your
computer, use the
Advanced dialog box.
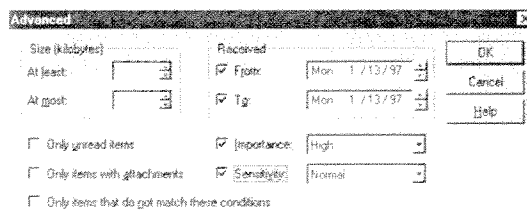
- *Disconnect After Connection Is Finished.* Specifies if Outlook disconnects from the remote server after mail is transferred.
- *Schedule.* Displays the Schedule Remote Mail Connection dialog box (see Figure 22.28), in which you can set times to connect to and transfer mail. Click OK to return to the Remote Mail tab.

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FIG. 22.28

If you want Outlook to automatically connect to and transfer messages at specific times or at periodic intervals (such as every hour), fill out this dialog box.
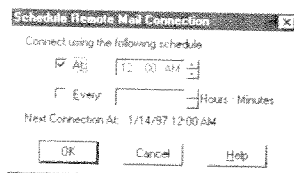
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- *Process Marked Items.* Specifies that remote mail should transfer marked items. This option is available only when you specify a scheduled connection time.

- *Retrieve Items that Meet the Following Conditions.* Enables you to set filtering criteria for items to be retrieved when Outlook's Remote Mail feature connects to Exchange Server at scheduled times. Click the Filter button below this option to set filtering criteria.

Click OK to save these settings and to return to the Services dialog box.

8. Click OK to save your Exchange Server information service configuration and to return to Outlook.

9. Exit, log off, and restart Outlook to activate your new Exchange Server settings.

When you upgrade to Outlook on a system using Exchange Server, all custom folder views are supported by Outlook, enabling Outlook and Exchange Client to share the same public folders. Public folders opened by Outlook are seen exactly the same as if the user opens the folder using Exchange Client.

There are a few things you should keep in mind when you have environments in which Outlook and Exchange Client share folders, forms, and other items. Some of the differences that exist between the way Outlook and Exchange Client handle items are:

- Outlook non-table views do not appear in Exchange Client. When you have views such as Calendar and Card views saved to a public folder, Exchange Client cannot view them.

- Outlook table views must be saved using the Save Views in Exchange 4.0. This way, all Outlook table views appear in the Exchange Client view. You can set this by right-clicking a folder and selecting Properties. On the General tab of the property page for that folder, click the Automatically Generate Microsoft Exchange Views option. An example of this is shown in Figure 22.29.

FIG. 22.29
You can set up an
Outlook public folder
so that Exchange
Client can view
Outlook table views.
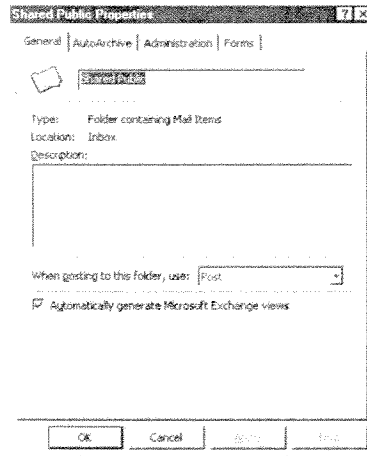
Outlook can use forms created by the Exchange Forms Designer (EFD), but Exchange Client cannot view forms created with Outlook forms. This also includes public forms. If you plan to send forms on a network in which both Outlook and Exchange Client are installed, be sure to use EFD. This way, all your users on the network can send and retrieve forms.

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You can find more information about the EFD by visiting the Microsoft Exchange Web site at
http://www.microsoft.com/exchange.

> **See** "Creating a Form" **p. 660**

Outlook looks for new e-mail in the default Microsoft Exchange profile personal folder. If Exchange is set up to send e-mail to a different folder, you must configure Outlook to look for mail in that folder.

After you upgrade to Outlook, the same Exchange Client configuration settings are used by Outlook. You can set different configurations by following the previous steps.

Outlook provides additional preview features. In Outlook, you can preview text of messages in the Inbox without opening the entire message. This is not possible using Exchange Client.

Some Outlook message option properties are not supported by Exchange Client (see Figure 22.30). These include Use Voting Buttons, Have Replies Sent to, Do not Deliver Before, Expires After, and both of the Tracking options.

FIG. 22.30
Some Outlook
message options
cannot be viewed by
the Exchange Client.
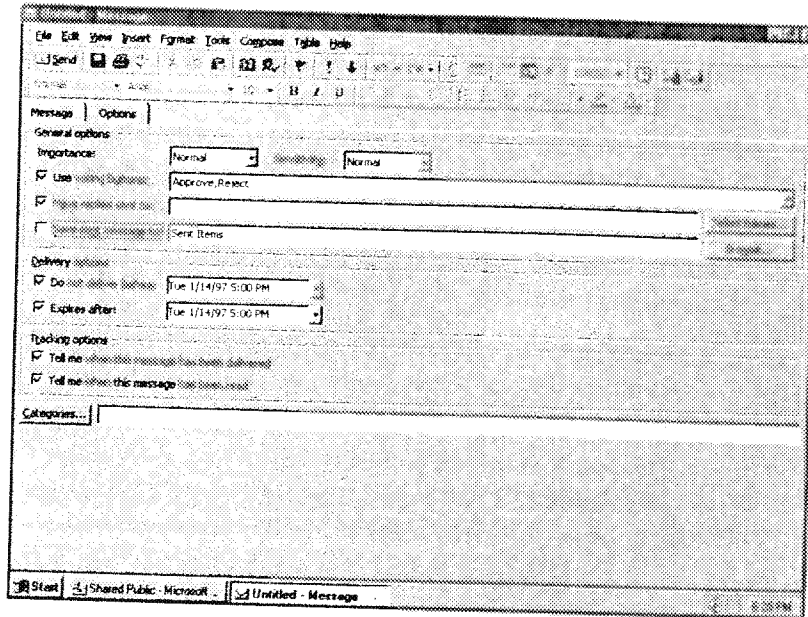
This section just highlighted some of the key differences between Outlook and Exchange Client when you run Outlook on a network with Exchange Server. When you use Outlook in a mixed environment, your users should be aware of the differences between the two. One way to understand the administration and technical concerns of upgrading to Outlook, download a Microsoft white paper from the World Wide Web called *Microsoft Outlook 97: Interoperability with Microsoft Exchange Client, Microsoft Mail Version 3.x, Microsoft Schedule+ 95, and Microsoft Schedule+ Version 1.0*. You can find this paper in Word for Windows format at **http://www.microsoft.com/outlook.**

Working with CompuServe Messages

The CompuServe Information Service (usually called simply CompuServe) is the second largest online information service in the world. It provides its members with access to the Internet, members-only areas (known as forums), e-mail, and other services. You can use Microsoft Outlook's CompuServe Mail information service to send and receive CompuServe e-mail.

TIP You must have a CompuServe membership to send and receive CompuServe mail using Outlook. The following instructions and steps assume you have a CompuServe membership and that you know your user name, CompuServe user ID, your password, and the phone number you use to access CompuServe. For new account information, call 1-800-457-MAIL.

The driver you need to configure the CompuServe information service is not included on the Microsoft Office 97 or Microsoft Outlook 97 CD-ROM or floppy disks. In fact, the driver is not written specifically for Outlook, but rather for the Microsoft Exchange client, and is called CompuServe Mail for Exchange. You need to obtain this driver from CompuServe by using the GO word CIS:MAP-36. The file, named CSMAIL.EXE, can be downloaded for free and takes about 14 minutes to download using a 28.8Kbps modem.

After you download the file, use the following instructions to install and configure the CompuServe information service for Outlook:

1. Double-click the CSMAIL.EXE file in Microsoft Explorer to uncompress the CompuServe Mail for Exchange file. This places 14 files on your hard drive.

2. Double-click the SETUP.EXE file that the CSMAIL.EXE places on your hard drive. This launches the CompuServe Mail for Microsoft Exchange wizard setup program (see Figure 22.31).

FIG. 22.31
You must run the CompuServe Mail for Microsoft Exchange setup program to install the necessary files for Outlook to send and receive mail from CompuServe.
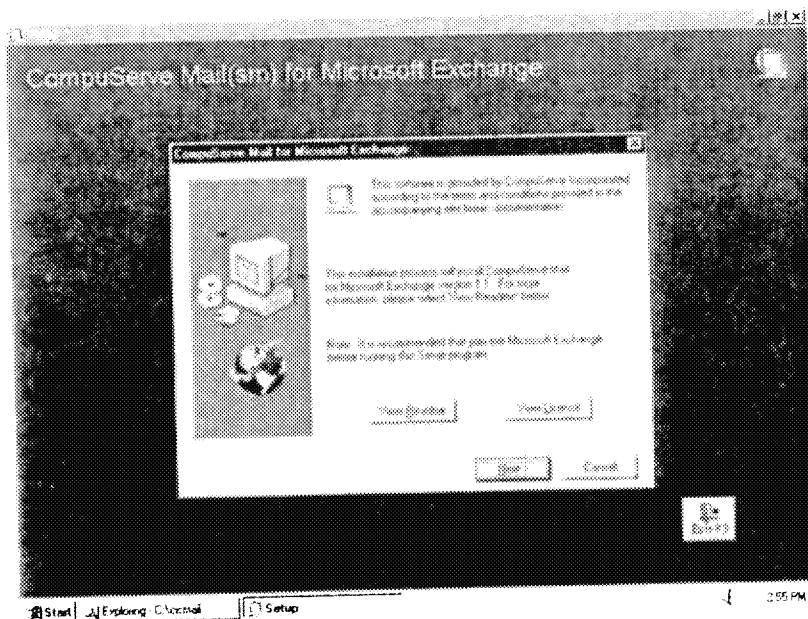
3. Click Next, to display a wizard screen (see Figure 22.32) that lets you choose how you want the CompuServe Mail for Microsoft Exchange service to use the CompuServe Dialer to establish a PPP connection to retrieve your CompuServe mail. Make sure the CompuServe Dialer option is checked if you want to enable this option. If you have a Dial-Up Networking connection established for CompuServe, you may elect not to use the CompuServe Dialer option.

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On this wizard screen, you also have the option of specifying a new location for the CompuServe Mail for Microsoft Exchange files to be stored. To change the destination folder, click the Browse button and specify a new folder. Click OK to return to this wizard screen.

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FIG. 22.32

This wizard screen enables you to set the CompuServe Dialer option and folder destination, and displays how much disk space is required for the installation.
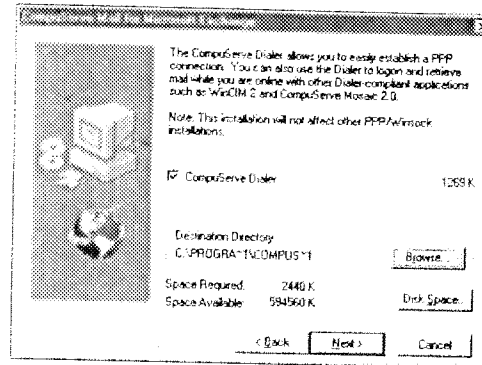
4. Click Next to continue the setup process. A Setup window displays, showing you the progress of the installation process.

5. After the files are installed, a Question dialog box (see Figure 22.33) displays, asking if you want the CompuServe Mail for Microsoft Exchange to be added to your default Outlook profile. Click Yes. The Inbox Setup Wizard displays.

FIG. 22.33

If you do not want to set up the Compu-Serve Mail for Microsoft Exchange service now, you can click No on this dialog box.
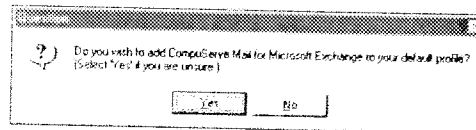
6. On the Inbox Setup Wizard (see Figure 22.34), specify the location of the folder that other CompuServe products (such as WinCIM) share.

7. Click Next. On the next wizard screen you need to specify CompuServe account information and access numbers. In the Your Name field, enter your full name. In the CompuServe User ID field, enter your valid CompuServe user ID. In the Password field, enter your password. Finally, in the Access Phone Number field, enter the phone number you use to access CompuServe. An example of how this screen appears filled out is shown in Figure 22.35.

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FIG. 22.34
Usually, Windows 95
specifies the shared
CompuServe folder
on your system.
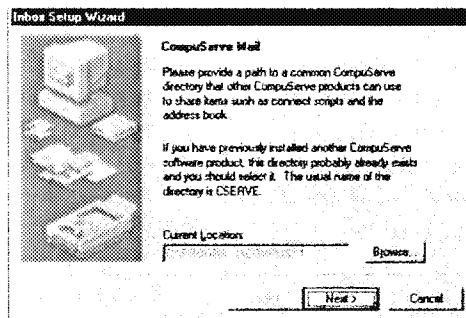
FIG. 22.35
When filling out this
wizard screen, be sure
to use your own
CompuServe account
information and
access number.
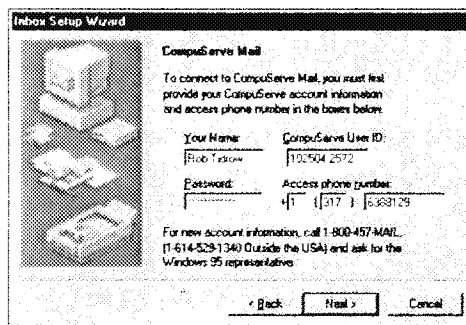
8. Click Next. The next wizard screen (see Figure 22.36) includes the following options:

    - *Create Session Activity Logs.* Enable this option if you want CompuServe Mail to keep a log file of your online session activities. A log file of your activities sometimes helps you when you are troubleshooting or diagnosing problems with CompuServe Mail.

    - *Delete Retrieved Messages.* Enable this option if you want CompuServe Mail to delete all messages from CompuServe after you download them. Until you test your CompuServe Mail configuration, you may want to disable this option so that your e-mail messages remain on CompuServe. Then, as you grow confident that everything is working fine, enable this option by accessing the CompuServe Mail information service properties from within Outlook.

9. Click Next to finish the installation process.

Once you set up CompuServe Mail using the CompuServe Mail wizard, you can set or change properties while in Outlook. This is the only way, for instance, to set up the CompuServe Mail information service to use a direct LAN or Winsock connection (instead of dial-up connection). To configure CompuServe Mail properties, use the following steps:

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FIG. 22.36
You can decide if
CompuServe Mail
should create a
session log and if it
should delete your
e-mail from Compu-
Serve once you've
downloaded it.
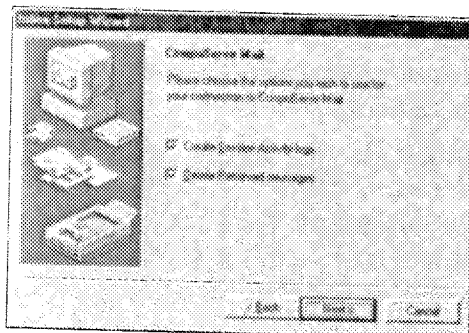
1. In Microsoft Outlook, choose Tools, Services.
2. In the Services dialog box, double-click the CompuServe Mail service. This displays the CompuServe Mail Settings properties page (see Figure 22.37).

FIG. 22.37
The CompuServe Mail
Settings properties
page is used to
configure the
CompuServe Mail
information service
from within Outlook.
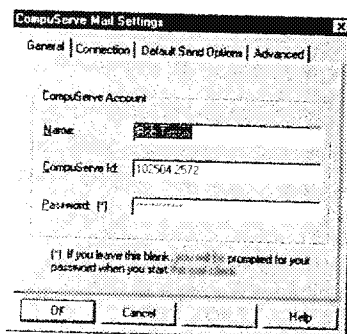
3. On the General tab, modify your CompuServe account information, if necessary.
4. Click the Connection tab (see Figure 22.38). On this tab, you can modify the CompuServe access number, the modem you want to use (specified by using the Preferred Tapi Line drop-down list), and which network you want to access (CompuServe in this case). You also can set the following connection settings:

FIG. 22.38
You can modify
connection
properties on the
Connection tab.

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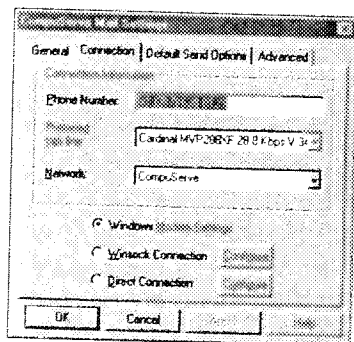
- *Windows Modem Settings.* Specifies that the CompuServe Mail information service is to connect to CompuServe using the modem you specify in the Preferred Tapi Line drop-down list.

- *Winsock Connection.* Specifies that you want to connect to CompuServe using an Internet connection. Click the Configure button next to this option to display the WinSock Settings dialog box (see Figure 22.39). In the Host Name field, enter the Internet host, such as COMPUSERVE.COM. If you have an IP address to use instead, enter that number in the Host IP Address field. The IP address field setting is used instead of the host name if an IP address is denoted. In the Connect Timeout field, specify the timeout value for the Internet connection. The Use CompuServe Dialer option enables you to specify if CompuServe Mail should use the CompuServe Dialer application to connect to the Internet using a PPP connection. Click OK after you complete this dialog box.

FIG. 22.39
Specify WinSock
Settings using this
dialog box.
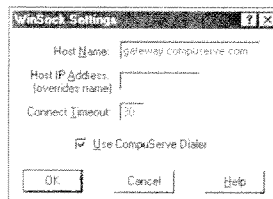
See "Sending and Receiving Internet E-mail," **p. 459**

- *Direct Connection.* Specifies whether you want the CompuServe Mail information service to connect to CompuServe via a LAN. Click the Configure button next to this option to display the Direct Settings dialog box (see Figure 22.40). In the Connector field, specify the communications port you want to use to directly connect to CompuServe. Next, select the baud rate from the Baud Rate field at which you want to connect to CompuServe. Click OK after you complete this dialog box.

FIG. 22.40
Specify settings for a
direct connection to
CompuServe.

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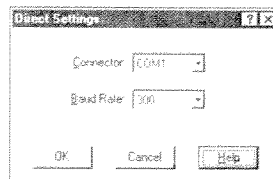
5. Click the Default Send Options tab (see Figure 22.41) to specify options for how the CompuServe Mail information service is to send mail. The following options are available on this tab:

FIG. 22.41
Use the Default Send Options tab to configure how CompuServe Mail sends your outgoing messages.
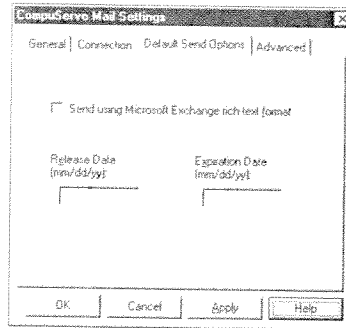
- *Send Using Microsoft Exchange Rich-text Format.* Specifies that all your messages are to be sent using rich-text formatting, such as varying font attributes, different font types, and different font sizes.
- *Release Date.* Specifies when a message is held until a certain date, then sent to the recipient. If you do not enter a date here, all messages are sent the next time you send messages.
- *Expiration Date.* Species that a message should be deleted from the recipient's mailbox automatically at a specific date.

6. Click the Advanced tab (see Figure 22.42). The following options are available on this tab:

FIG. 22.42
Use the Advanced tab to configure mail settings for when CompuServe Mail is not used for remote mail operations.
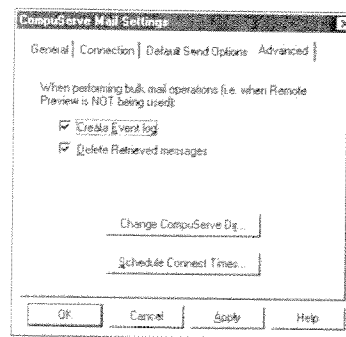
- *Create Event Log.* Specifies that CompuServe Mail is to create a log of your session events.

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- *Delete Retrieved Messages.* Specifies that CompuServe Mail is to delete your messages from CompuServe after they are downloaded to Outlook.

- *Change CompuServe Directory.* Enables you to specify a different shared CompuServe folder. Click this button to display the Browse for Folder dialog box, from which you select the new folder. Click OK to return to the Advanced tab.

- *Schedule Connect Times.* Enables you to specify times that the CompuServe Mail information service automatically retrieves your mail from CompuServe. Click this button to display the Connection Times dialog box (see Figure 22.43). You can specify that CompuServe Mail activates at the following times: when you start up Outlook; at regular intervals (such as every hour); or at a specific time (such as at 1:00 P.M. every day). Click OK to save your settings and return the Advanced tab.

FIG. 22.43
Schedule when the
CompuServe Mail
information service
should automatically
retrieve your new
messages.
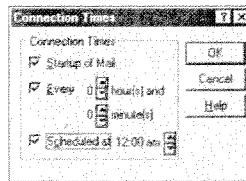
7. Click OK to save your CompuServe Mail Settings configuration and to return to the Services page.

8. Click OK again to return to Outlook.

You now can use the CompuServe Mail information service to receive mail using CompuServe.

CAUTION

Currently, the CompuServe Mail information service does not support Outlook's Remote Mail feature that enables it to download only message headers to your client. Future releases of the information service may include this feature.

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From Here . . .

One of the strengths of Outlook is its capability to support several different information services for e-mail. This chapter provided you with an overview of how to extend Microsoft Outlook to use information services to send, receive, and reply to e-mail services supported by Outlook. These services included Microsoft Exchange, Lotus cc:Mail, Microsoft Network, and CompuServe.

For related information, see the following chapters:

Chapter 20, "Sending and Receiving Internet E-mail," describes how you can use Outlook to connect to the Internet to send and receive Internet e-mail.

Chapter 23, "Sending and Receiving Faxes," shows how to set up Outlook to use the Microsoft Fax information service for sending and receiving fax messages. You also are shown how to convert a fax message to a file you can edit.

Chapter 26, "Working Remotely," describes how you can use Outlook's Remote Mail feature to send and download e-mail messages remotely. You are shown how to use Remote Mail to connect to Microsoft Mail, Microsoft Exchange Server, MSN, and Internet Mail information services.

CHAPTER

24

Creating Items Automatically

by Pamela A. Palmer

Microsoft Outlook is designed to facilitate the management of your day-to-day work. It has added several features to speed up the creation of its objects. It also provides an easy way to work with other Office applications.

You can rearrange information in your folders, use AutoCreate to generate new items based on another item, create shortcuts on the desktop to certain items, and work with your files from within Outlook to track your activities.

Organizing your work in folders

Many messages will need to be stored for future reference. You can organize them in different folders.

Using AutoCreate to create Outlook items

As you work, you will need to create a new item based on information in another object—like a message to one of your contacts. AutoCreate can minimize some of the typing required to create that new item.

Creating shortcuts

You can create shortcuts and attachments for files in Outlook items and shortcuts for Outlook items on your Windows desktop.

Working with other Office applications

You can create shortcuts to items in other Office applications, as well as create Office documents from Outlook.

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Reviewing Typical Scenarios

Microsoft Outlook was designed to facilitate your time and information management. If you get into the habit of managing everything through Outlook, you can really track your work and time and use Outlook to its full potential.

If you are going to track your information in Outlook, there will be times when you will create an item using information from another item. Here are some possible scenarios where you might need to create a new item from an existing item:

- You receive a message that asks if you can complete some action or attend a meeting. You might want to create a task or an appointment.
- You have to complete some action that is specific to a particular contact. You might want to create a task or appointment for that contact. You might also want to send a message or a letter to that contact to confirm the appointment or task or to receive further information.
- You need to work on a document for a project or task. You might want to track how much of your time is spent in the document using a journal entry.
- You have a task that needs to be completed. You might want to schedule an appointment for yourself to accomplish it.

The key to effectively using Outlook is to remember to track these items. This will allow you to manage your time and track your work. You can save several steps when creating these related items using AutoCreate.

Understanding AutoCreate

Microsoft Outlook has a function called AutoCreate that enables you to create new items based on fields in an existing item. It is similar to using the Clipboard, but more selective. AutoCreate can cut down on your data entry when adding a new item.

AutoCreate is not on the menu or the toolbar directly. It is built into several functions and supported with drag and drop. When one of these functions is used, AutoCreate takes the matching fields and completes that new item's corresponding fields. You will have fewer fields to complete.

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Creating New Items in Similar Folders

With all of the items in Outlook, you can use the Clipboard to create duplicates of any existing Outlook item. You can choose Edit, Copy and Edit, Paste, or use the new option which is Edit, Copy to Folder. Edit, Copy to Folder creates a duplicate message in a different folder or a duplicate of any items in their specific folders. The Copy to Folder combines Copy and Paste into one command. Follow these steps to copy a message to another folder:

1. Select a message from a message folder's list.
2. Select Edit, Copy To Folder. (If you want to remove it from its current folder, select Edit, Move to Folder.)
3. Select a message folder from the Copy Items dialog box (see Figure 24.1).

FIG. 24.1

The Copy Items dialog box allows you to select the folder for the new item.
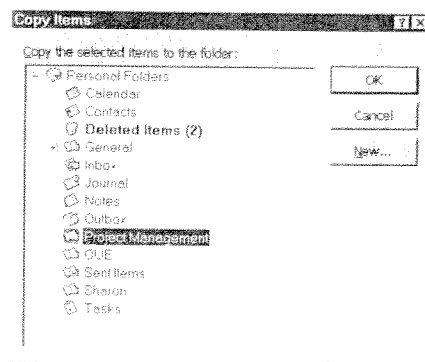
4. Click OK.

This will create a duplicate message in the selected folder. These functions create a duplicate of the item using the Clipboard. There is also an Edit, Move to Folder command. For messages, it works like Edit, Copy to Folder except it removes the original. For all other items, it creates a new item specific to the folder. For more information, refer to the section "Creating New Types of Items Using an Existing Item" later in this chapter.

AutoCreate can also be used to create a new item based on an existing item in similar folders. Within Outlook, you can use this feature to create an e-mail message in any of your mail folders. You can also use AutoCreate to create a new Contact based on an existing Contact in the Contacts folder.

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Creating Messages

The first area that uses AutoCreate is the Compose, Reply command. If you highlight any current e-mail message, you can then select Compose, Reply or Reply to All; or the Reply button or Reply to All button on the toolbar. This creates a new message, filling in the To field with the sender's e-mail address, and the Subject field with the subject from the original message.

The Compose, Forward command also uses AutoCreate. Outlook creates a new mail message and inserts the mailing information and the text of the original message into the new message text (see Figure 24.2).

FIG. 24.2
A forwarded message uses AutoCreate to incorporate original message information and text into a new message.
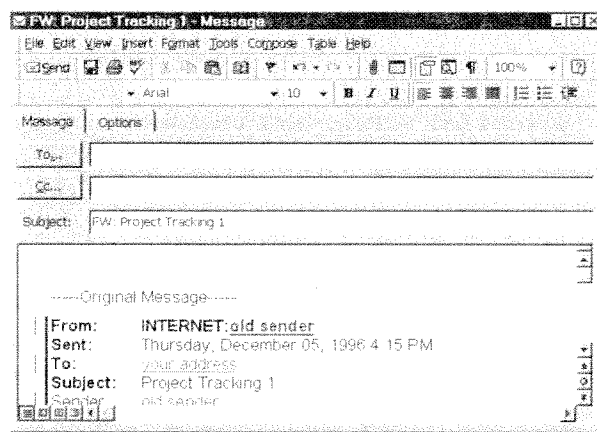
Creating Contacts

AutoCreate can also be used to create additional contacts from one company. This can be done from the Contacts menu in the Contacts group or from the Contact menu for a specific contact.

To create another contact for a company, follow these steps:

1. Select the Contacts group from the Outlook bar.

2. Select a contact from the list.

3. Select Contacts, New Contact from Same Company.

Do the following to create another contact for a company from the contact window:

1. Select the Contacts group from the Outlook bar.

2. Select a contact from the list.

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3. Open the contact.

4. Select Contact, New Contact from Same Company.

Both of these processes will create a new contact and display a Contact window (see Figure 24.3). AutoCreate fills in many of the fields including the Company, Address, Business phone, and Business Fax fields from the original contact. This reduces the time required to complete an entry.

FIG. 24.3
The New Contact requires less entry because it borrows fields from the original.

Creating New Types of Items Using an Existing Item

You can use an existing item to create a new item in another folder by filling in matching information where possible. This can be completed by using several menu functions or dragging and dropping.

Using the Move/Copy to Folder Commands

The first way to take advantage of AutoCreate to create a new type of item is to choose Edit, Move to Folder or Edit, Copy to Folder. When you use these commands and select a different type of folder than the original item type, AutoCreate creates a new item by filling in corresponding fields. If you choose Move to Folder, the original item will be deleted.

For example, let's say that you receive a message and you need to create a new appointment with the information in the contents of the message. You could:

1. Select the message.
2. Select Edit, Copy to Folder.
3. Select Calendar from the Copy Items dialog box.

A new appointment will be created in the Appointment window (see Figure 24.4). The Subject from the message will be the Subject for the appointment. AutoCreate will also take the entire message information and place it as the note for the appointment.

FIG. 24.4
An Appointment can be created from a message using Edit, Copy to Folder.
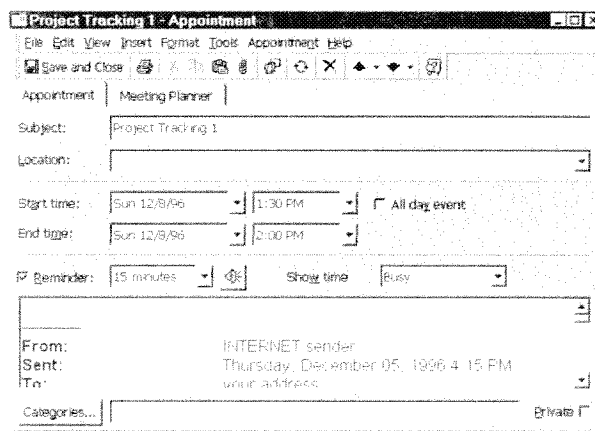
The Move to Folder option will give you different results. To see how this works, follow these steps:

1. Select the message.
2. Select Edit, Move to Folder or select Move to Folder from the shortcut menu.
3. Select Calendar from the Copy Items dialog box.

A new appointment will be created in the Appointment window (see Figure 24.5). The Subject will be the Subject for the appointment, but you will not have the text as the note. It will have an attachment of the message, and the message will be removed from its mail folder.

Once the appointment is displayed in the window, you will need to enter any additional data required. For additional information on working with appointments, refer to Chapter 3, "Scheduling Personal Activities," and Chapter 14, "Planning Meetings."

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FIG. 24.5
An Appointment can be created from a message using Edit, Move to Folder.
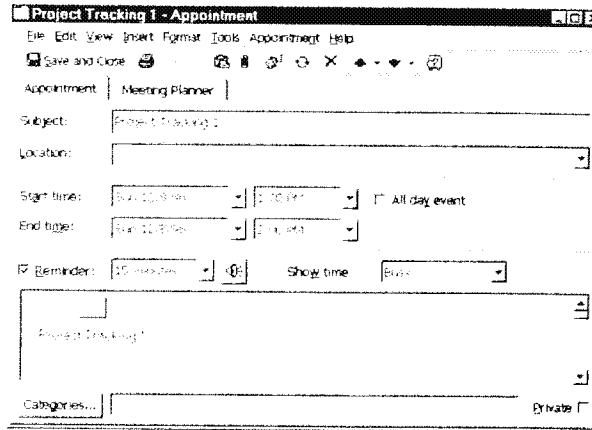
Using Drag and Drop

You can create new items using your mouse rather than the menus. You can drag an item on top of a folder to create a new item. For instance, if you need to create a message for one of your contacts, you could select a contact from your contact list and select Contacts, New Message to Contact. Or, you can use drag and drop.

1. Point to the contact with your mouse pointer.

2. Hold down the left mouse button and begin dragging. Your mouse pointer will change (see Figure 24.6).

FIG. 24.6
The drag mouse pointer.
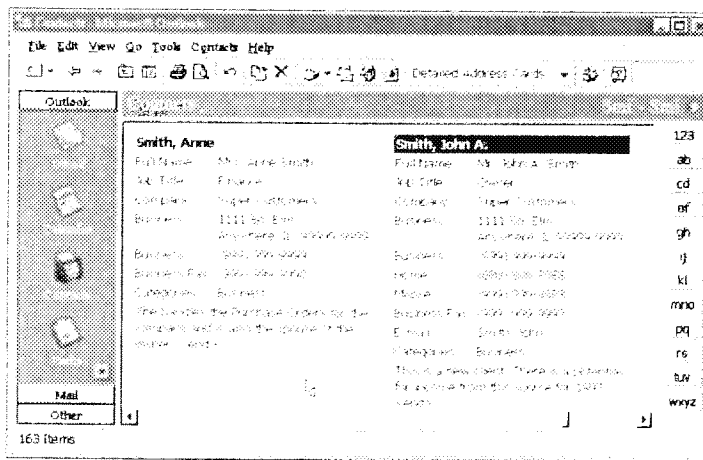
3. Release the mouse button when the mouse pointer is over your Outbox or another mail folder.

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A new message will be created, that uses the e-mail address of the contact as the To field of the message. If the selected contact doesn't have an e-mail address, a message box will open notifying you that the contact doesn't have an e-mail address and that it is using the Contact's name instead (see Figure 24.7). You will have to find a valid e-mail address before sending this message.

FIG. 24.7
Outlook notifies you when a contact is missing an e-mail address.
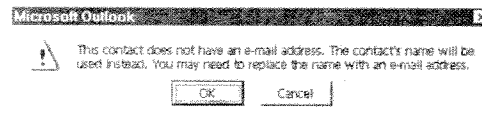
N O T E   If you are running the Office Assistant to help you with Outlook, the missing e-mail address message will be displayed as a message from the Office Assistant.

With both of these methods, you can use multiple items to create one new item. AutoCreate will simply use the first item to fill the common fields and then add the additional items as text. If you are using the Move to Folder approach, each item will appear as a separate attachment.

Fields Supported by AutoCreate

You can use the Move/Copy to Folder comands or drag and drop to create new items. As you create new items, AutoCreate will complete as many fields as possible. You need to be aware of what will be filled in for you and where you will have to enter new data.

Creating Messages

You might find it useful to create messages from other types of items. This is supported by all of the other items to varying degrees. Once the item is created, you need to complete the remaining fields and send the message. For more information, refer to Chapter 9, "Receiving and Sending Microsoft Mail Messages."

From Appointments   There are two methods for creating a new message for appointments. You can use the Move/Copy to Folder command or drag and drop. You might want to send information regarding an appointment to another attendee. You can create a message based on an appointment. When AutoCreate generates the new message, it can complete the Subject and Note fields for you, as shown in Figure 24.8.

FIG. 24.8
You can create a
message from an
appointment by using
AutoCorrect.
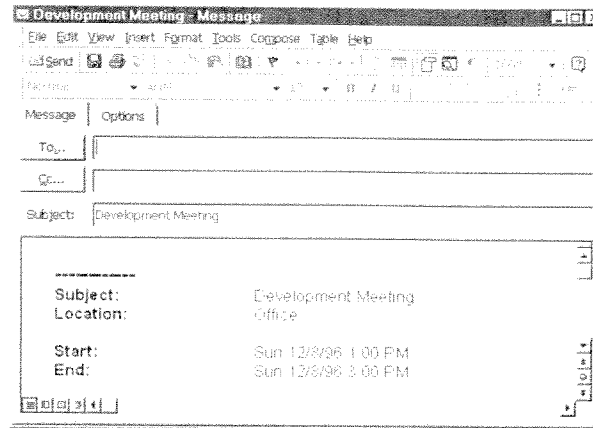
The Subject of the appointment will become the Subject of the message. Often, the reason for creating a message for an appointment is to notify others of the date and time. To support this type of message, AutoCreate takes the Subject, Locations, Start, End, Show Time As, Meeting Status, Attendees, Recurrence, Categories, and Note and turns them into text inside of the message Note.

You can also use the Meeting Planner tab to create a message from an appointment. Once you add someone else to the list of attendees for an appointment, AutoCreate turns the appointment into a meeting request containing all of the information of the appointment. For more information on meeting planning, refer to Chapter 14, "Planning Meetings."

For Contacts   In the section, "Using Drag and Drop," a message was created from a contact. When a message is created from a contact, the contact's e-mail address is used in the To field.

If you use a contact that doesn't have an e-mail address, you get a message that the current contact's name will be used instead. This will create messages that cannot be sent. If you get this prompt, you will have to go through the process of entering or selecting the appropriate e-mail address for the contact.

TIP   If you upgraded from Microsoft Exchange and Schedule +, you might encounter this problem more frequently. With those two products, the information was stored separately. Rather than go through your entire address list in Exchange at once, you might want to wait to get this missing e-mail address prompt and then add it to the contact's information.

For Tasks   There are two methods for creating messages for tasks. You can use the Move/Copy to Folder command or drag and drop. This will create a new message using the Subject of the original task for the new message. It then takes the remaining fields and turns them into text for the Note.

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The other method for creating a message is to select Task, Assign Task from the Task window or right-click the task in the list and select Assign Task. This converts the task into a message to be sent to the contact. For more information on assigning tasks, refer to Chapter 17, "Assigning Tasks."

For Journal Entries and Notes   Although it is not as common, you can create a message based on a journal entry or a note. You might want to show someone the time spent on particular issues or share information that you have stored in a Note.

When you create a message from a journal entry, The Subject becomes the Subject for the message and all of the fields are converted into text for the Note.

When you create a message from a note, the first line becomes the message Subject and the remainder of the note becomes the Note of the message.

Creating Appointments

Appointments share a number of fields with many other objects. You can create appointments from any other item. Once the item has been created with as many of the fields filled in as possible, you need to complete the appointment. For additional information, refer to Chapter 3, "Scheduling Personal Activities." If the appointment requires a meeting request, you might want to refer to Chapter 14, "Planning Meetings."

From Messages   Often when someone wants to schedule a meeting with you, you will receive an e-mail message. Rather than create an appointment from scratch, you can use the message as a base.

When you use a message as a base for an appointment, the Subject becomes the Subject for the new appointment and all of the fields become text in the Note field. You will have to scan the message for the date and time to complete the scheduling of the message, as well as add any additional information. You might have to add the location and a reminder, as well as indicate how to show the appointment on the calendar.

From Contacts   When you want to schedule a meeting between you and one of your contacts, you can save a lot of time by using AutoCreate. When you create an appointment for a contact, it turns it into a meeting request.

The contact's e-mail address is added as the To field. His or her name is then added to the Meeting Planner tab. When you have added the rest of the fields, select Send.

From Tasks   When you are planning your work, you will set up tasks for yourself and others. If the task is one that requires a long investment of time, you might want to make an appointment for yourself to work on that task.

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When you create an appointment from a task using the Copy to Folder command or drag and drop, the Subject from the task becomes the Subject for the appointment, and all of the fields become part of the note.

This is one area where you might find that using the Move to Folder command is more suited for your purposes. When you use the Move to Folder command, AutoCreate creates a new item using the relevant fields to complete the new item, in this case the Subject field. It then inserts the Task as an attachment.

When the newly created appointment occurs, you can open it and open the corresponding task. Tasks have more fields to assist you with tracking your time, such as start and end times, as well as status.

The drawback to this approach is that the task will no longer appear on the task list. If you like to see all of your tasks in your Task list, this approach will not work for you. You will have to use whichever method works well with the way you track your work and time.

From Journal Entries and Notes   Although there isn't a clear scenario for it, you can create appointments from journal entries and notes. With journal entries, the Subject becomes the appointment's Subjects and the Subject with the rest of the fields becomes text in the Note field. For notes, the first line becomes the Subject, and the entire note becomes the Note field for the appointment.

Creating Contacts

You can create contacts from Messages, Appointments, and Tasks with limited field completion. You can also create Contacts from Journal Entries and Notes; however, because they do not share any common fields with Contacts, none of the fields will be completed.

From Messages   You will often get valuable messages from people and companies that you will want to keep track of. You will want to create a contact based on the information. When you create a contact from a message, you will only have access to the information that is attached to the message. For Messages, the e-mail address will be plugged into the Full Name and E-mail fields.

From Appointments and Tasks   You can also schedule a meeting with multiple attendees or schedule a task for someone. You might, on later consideration, realize that one of those attendees or task assignments should be one of your contacts.

When you create a new contact based on an appointment, only the first attendee will be accessed. It will take the first attendee's e-mail address and add it as the Full Name and e-mail address for the contact.

When you create a contact from a task, you will be restricted to using the person to whom the task is assigned. It will take her e-mail address and use that as the Full Name and e-mail address for the new contact. If you are only managing tasks for yourself, you probably will not need this function because a contact for yourself isn't needed.

Creating Tasks

Of all of the items you can create utilizing AutoCreate, tasks are one that you should definitely take advantage of. When you use Outlook to keep track of your schedule, you will find that you spend more time creating appointments or tasks. If your work is spent in meetings or groups, your activities are very time-driven and you will find that appointments will work best for you. If you find that your work is a series of tasks that need to be completed, but do not depend on beginning and ending at a specific time, tasks are a better choice.

Keep in mind that after AutoCreate has completed its work, you need to fill in the remaining fields. For more information, refer to Chapter 4, "Tracking Personal Tasks," and Chapter 17, "Assigning Tasks."

From Messages   One of the most common needs is to create a task from a message. If someone sends you a message asking a question or asking you to complete a task, you will want to add that question or task to your task list instead of trying to remember that message. When you create a task from a message, the message's Subject will fill the Subject for the task, and all of the fields will be placed as text in the Note field.

From Appointments   You might also need to create tasks from appointments. You will want to set up an appointment to plan a project or event. From this, you will want to create a task list. Rather than create it from scratch, let AutoCreate assist you. The Subject will become the task's Subject, and all of the fields will become text in the Note field. A task created from a message and one created from an appointment is the appointment's Start Date and will become the Due Date for the task (see Figure 24.9).

N O T E   The addition of the appointment's Start Date as the task's Due Date is often a drawback because the appointment was probably to set tasks for completion in the future. This means that you would have to change the date anyway. You might want to create the first task and then use it as a model for additional tasks.

FIG. 24.9
AutoCreate helps
create a task from
an appointment.
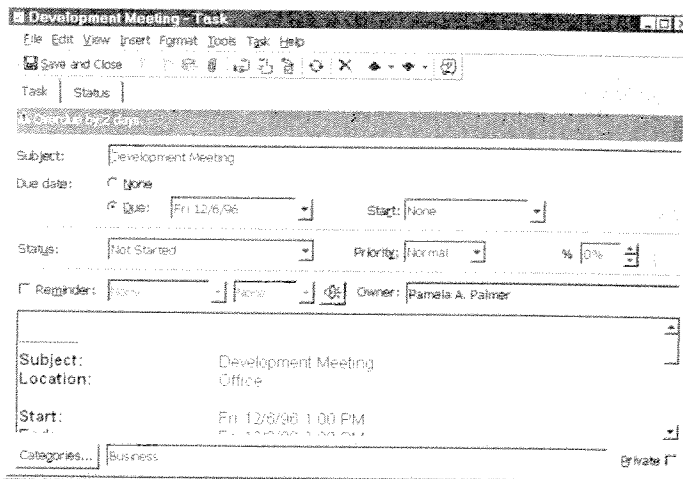
From Contacts   When you create a task from your contact, AutoCreate assumes that you are going to assign the task to that contact. AutoCreate will fill in the To field for the task.

From Journal Entries and Notes   Although it doesn't come up very often, you can create a task from a journal entry or a note. If you create a task based on a journal entry, the Subject will become the task Subject and the entire contents will become text in the task. Using a note, the first line will become the Subject and the entire note will become the Note field for the task.

Creating Journal Entries

Journal entries are very useful to help you track your time. The best approach is to set Outlook so that you do not have to consciously enter anything to track your work. Chapter 7, "Recording Your Activities," walks you through the process to have the Journal automatically enter items in the journal as they occur. The Journal can also be set to track the Office files you work with.

For all of the items, the Journal entry fields will be populated from the common information in the base item. One difference between this object and the others is that you do not get the entire item as text in the Note field. It stores the item as an attachment.

Creating Notes

When you create a note based on any other item, you are restricted because a note can only hold text. When you create a note based on any other object, AutoCreate will take all of the fields and convert them into text. It will leave the first line blank to allow you to enter a line to be used to identify the note in the Note folder.

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Dragging Items to the Windows Desktop

In addition to using AutoCreate to simplify the process of creating new items, you can also place items directly on your desktop. If there is a task you are working on or a contact you use frequently, you might want to consider creating a shortcut on your desktop.

To create a shortcut for an Outlook item do the following:

1. Restore Outlook into a window if it is maximized.
2. Size Outlook so that you can see a portion of the desktop if needed.
3. Point to the item and hold down the primary mouse button.
4. Drag the item to the desktop.
5. Release the mouse button.

This feature allows you to access specific items from the desktop without launching Outlook first. You might find this very useful for Contacts and Notes that you need to access frequently. You can create visual notes on your desktop without having to look for a scratch pad.

You will not need to use this feature with appointments. If you set up an appointment that has a reminder set, Outlook will automatically remind you without adding it to your desktop.

Creating Outlook Items from the Office Shortcut Bar

Another feature that is often overlooked is the capability to create Outlook items without launching Outlook. All of the Outlook items can be created from the Microsoft Office toolbar. You can create an item by selecting the icon from the toolbar and entering the appropriate fields (see Table 24.1).

Table 24.1   Microsoft Office Outlook Icons

Icons	Item Created
	Create a new Mail Message
	Create a new Appointment
	Create a new Task

Icons	Item Created
	Create a new Contact
	Create a new Journal Entry
	Create a new Note

Unfortunately, real life and real work cannot always be planned. You do not want to lose Outlook's time tracking capability because tasks or appointments were not scheduled in advance. This is most valuable with journal entries, because it makes it easier to track your time.

For instance, someone calls you on the telephone and tells you that you have to get an information package mailed to someone before 5:00 P.M. You did not have this on your Calendar or have it as a part of your Task list. It still needs to be done, and it will interrupt your other appointments and tasks.

Rather than show the delay in finishing tasks or postponed appointments with no explanation, create a new task or journal entry to show how the time was lost. The same can be said for those impromptu meetings that interrupt your day. If you get in the habit of using the Office toolbar, you will have an explanation as to where your time went.

Using Outlook with Other Office Applications

Another Outlook benefit is that it has the capability to work closely with the rest of Microsoft Office. You can add Outlook items to your Office documents and create Office documents within Outlook.

Dragging Items from Outlook Folders to Office Applications

When you are working in an Office document, it might be valuable to include Outlook items. You might want to include references to all of your journal entries for a particular contact. This can help you illustrate how you use your time. You might also want to include any mail message to or from a particular contact. To take advantage of this feature, you will again use drag and drop:

1. Open Outlook with the appropriate folder displayed.
2. If Outlook is maximized, restore it to a window.
3. Open your Office document.

4. Restore the Office application to a window, if needed.

5. Arrange the windows so that you can see both.

6. Point to the item or items you want to include in your document and hold down the primary mouse button.

7. Drag your items onto the Office document and drop them.

The items will appear in the document as attachments represented by icons (see Figure 24.10). To access them from the document, double-click the icons. This process works regardless of the document type.

FIG. 24.10
You can access
Outlook items from
a Word document.

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To   Mr. John Smith   From   Pamela A. Palmer

We have had many requests for status on your projects. Here are the last requests

Project Tracking Project Tracking Project Tracking Project Tracking Project Tracking
5.msg   4.msg   3.msg   2.msg   1.msg
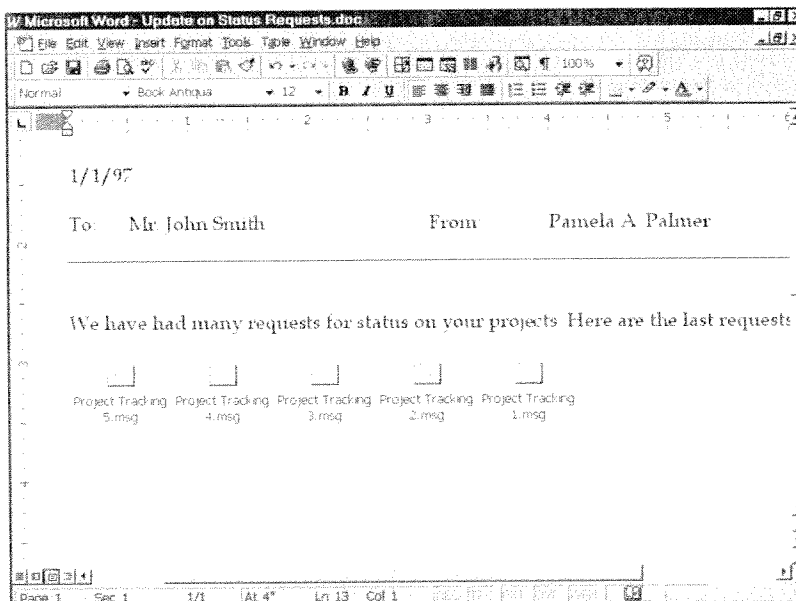
Creating an Office Document from Outlook

If you have a task or an appointment that involves creating a document, you do not have to go back to the desktop to create it; you can use the Outlook menus. To create an Office document from anywhere in Outlook, select File, New, Office Document.

Outlook displays only the General tab in the New Office Document dialog box. You can choose from a Microsoft Excel workbook, Microsoft Excel chart, Microsoft Word document, or a Microsoft PowerPoint presentation. You will not see all of the templates available here.

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Select a template and choose OK. You will be prompted to indicate whether you want to post the document in the current folder or send the document to someone. If you choose to post the document in the current window, Office will launch the selected application and create the new document. As usual, you will need to save your work.

If you choose to send the document to someone, Outlook will create a message. It will open with the Message tab selected to set who you want to send the document to. When you have entered that information, you will need to select the Document tab and create your document.

You can also create special documents using your contacts. You can send your contact a letter or use your contacts list as the source for a mail merge operation using Word.

Part

Creating a Letter from a Contact

Ch

To send a letter to one of your contacts, you can use your Contacts menu. You can select a contact from your Contacts group and select Contacts, New Letter to Contact to launch the Word Letter Wizard (see Figure 24.11).

FIG. 24.11
You can create letters in Outlook using the Letter Wizard.

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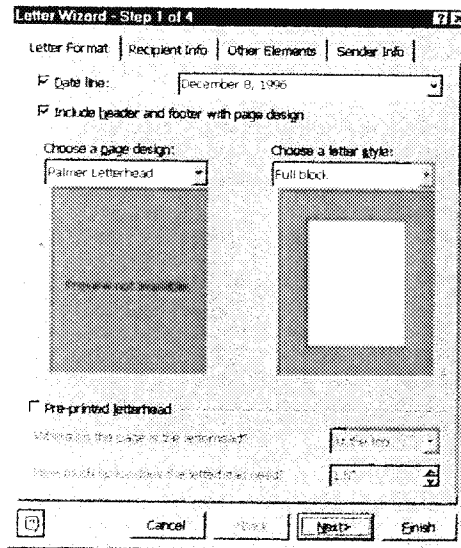
The first step of the Letter Wizard is to indicate the type of letter. You can set Outlook to display a date line in your letter and choose what format you want to use. You can then choose to include a header and footer with the page design.

The next step is to choose a page design and a letter style for your paragraph formatting. The page design is supplied by Word templates.

N O T E   If you have a customized letter template, it will need to be stored in the Office\Templates directory to be recognized by the wizard.

The second tab is Recipient Information, shown in Figure 24.12. If you had a contact selected, it would fill in that contact's mailing information. You can select another contact if the information is incorrect, and you can also add a customized salutation. You can select from many styles.

FIG. 24.12
The Recipient Information tab of the Letter Wizard fills in the recipient's mailing information.
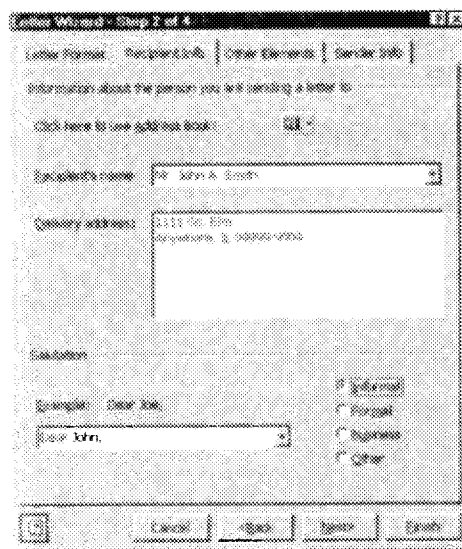
The third tab is for Other Elements (see Figure 24.13). These items are used with certain styles of writing. You can include a Reference Line, Mailing Instructions, Attention, Subject, and Courtesy Copies. The courtesy copies can be built using the Address Book.

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FIG. 24.13
You will want to use the Other Elements tab of the Letter Wizard depending on the style of letter you are creating.
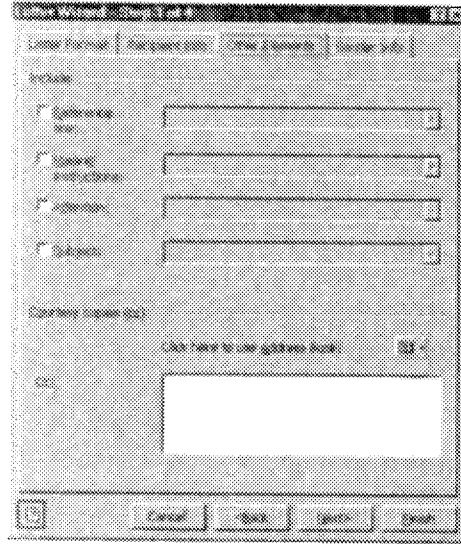
The last tab gives you an opportunity to enter your sender information or retrieve it from your Address book (see Figure 24.14). You might find it more convenient to customize a template with this information so that you only have to complete the Closing options.

FIG. 24.14
The Sender Information Tab enables you to specify who the letter is from.
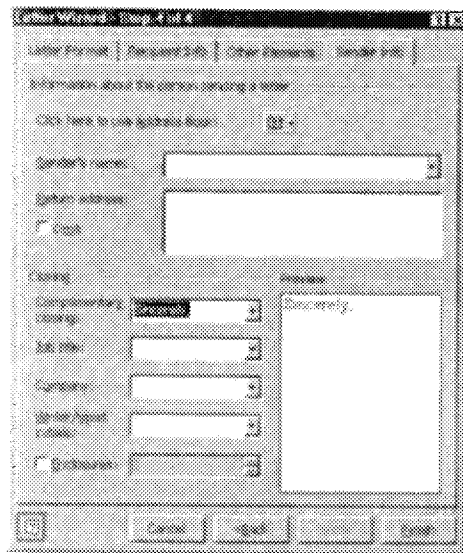
Once you have made all of your selections, select Finish. Outlook will pull up the appropriate template and fill in the selected information (see Figure 24.15). If you are using your own custom template, you might have to adjust the formatting of your letter.

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FIG. 24.15

The letter, as completed by the wizard.
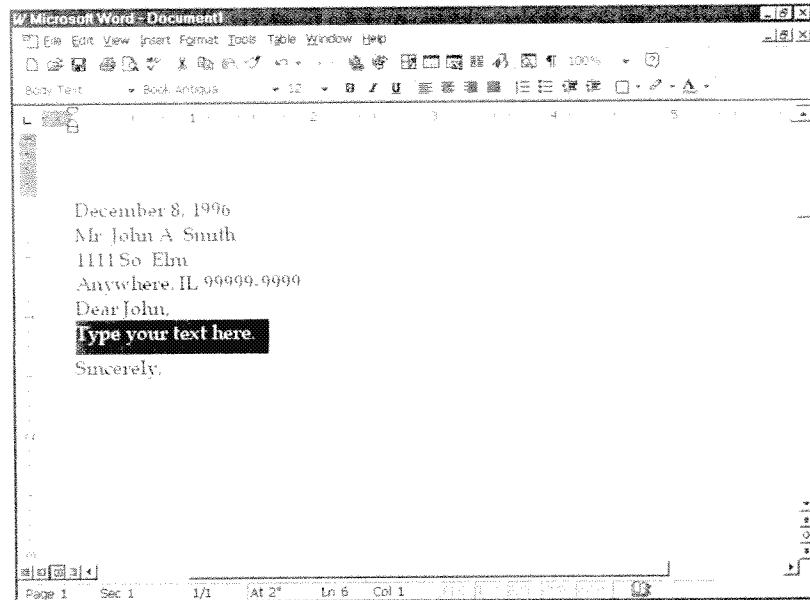
Using Contacts with Word's Mail Merge

Another way of taking advantage of the close relationship between Outlook and the other Office applications is to use your contacts to support mail merge in Word. Mail merge in Word is a three step process. You create a main document, select a data source, and complete the merge.

To use mail merge, create a new document using the application's menu or the Office toolbar and select Tools, Mail Merge. This will bring up the Mail Merge Helper (see Figure 24.16), which is designed to walk you through the process.

To begin, select the Create button and choose what type of merge document you are creating. You can select from Form Letters, Mailing Labels, Envelopes, or Catalogs. The wizard will ask you to use the Active Window or create a New Main Document.

Next, indicate what you want to use as a data source. You can create a Word document to store your merge fields, open another file that has your fields, use your Address book, and specify any header options. Select Use Address Book.

Outlook will ask you which address book to use. Select the Outlook Address book from the list shown in Figure 24.17.

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FIG. 24.16
The Mail Merge Helper helps you merge mail.
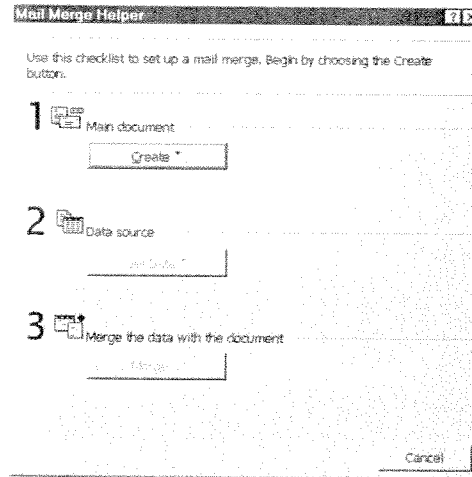
FIG. 24.17
The Use Address Book dialog box is used to connect to Outlook.

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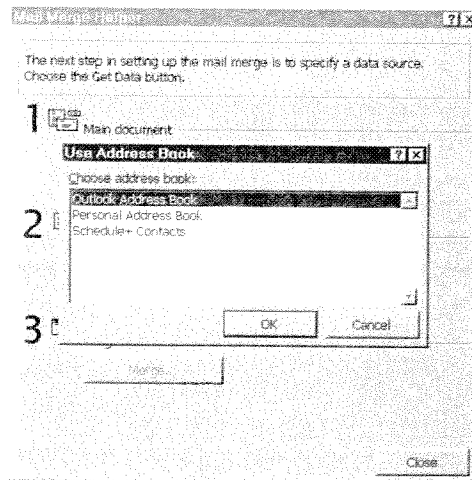
The Mail Merge Helper will then prompt you to edit the new main document. You can create your merge document, inserting the fields you need and adding any text. When you want to insert one of the Address fields, the field will have the same name as it has in Outlook, only there will be an underscore between the words. For more on mail merge, you can search the Microsoft Word help for the phrase *mail merge*.

A problem can occur when you only want to merge with a subset of your contacts. The Mail Merge Helper will not recognize any filters you have set up in Outlook. You will have to filter the data using the Mail Merge Helper. One of its options is to specify Query Options. This will open the Query Options dialog box (see Figure 24.18).

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FIG. 24.18
The Query Options
dialog box enables
you to filter your data
in Word.
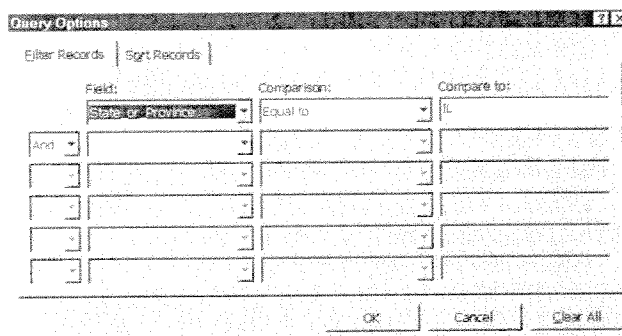
In this dialog box, you can specify a field to use to filter your data and set up your expression. Unfortunately, Word doesn't recognize all of the Outlook fields. For instance, you cannot filter using the Outlook Categories field. If you need to have greater flexibility, you might want to export your contacts to a file. For more information on exporting, refer to Chapter 25, "Exporting and Importing Items."

Creating Explorer Shortcuts and Attachments

Throughout this chapter, you have seen how to include an icon to represent one of the Outlook items and, in most cases, how to create a shortcut to that item. You can also use Outlook to manage and work with files and Web addresses.

When you select the Other group from the Outlook bar, you have access to three folders. You can access your computer's resources, the My Documents folder—the recommended location for your Office files—and the Favorites folder that stores your Web sites.

Outlook is designed to allow you to manage your work from one location so you don't have to go several places to accomplish your tasks. You can open documents directly from Outlook or access one of your favorite Web sites without having to launch another application.

This will save you time as you manage your day-to-day work, but you can extend this one step further by adding the document or Web site to your Outlook items. If you schedule an appointment to review a document, add the document to the appointment so that you do not have to search for it. If you set a task to research some topic, include a reference to your favorite Web site search engine.

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To create the reference to a file or Web site, use drag and drop. To add the icon to the Outlook item, follow these steps:

1. Open the Outlook item.
2. Select the folder that contains the file or Web site from the Outlook window.
3. Point to the file or Web site and click the primary button.
4. Drag it into the Notes area for the item.

The file or Web site will be added as an attachment represented by an icon in the Notes field for the file. You can also begin with the file or Web site, and then allow AutoCreate to create the shortcut for you.

You can select a file or Web site and drag it onto one of the folders. It will create a new item for that folder, inserting an icon for the file or Web site (see Figure 24.19). When you use this method, you will create a shortcut for files and Web sites (except when including them as a part of a message). They will always have attachments because messages are normally sent to others instead of being used on your system.

An attachment is a copy of a particular file or Web site that can be transferred to another machine. A shortcut is a pointer to the original and will save system resources. In all cases, the subject for the new item will be the file name or Web site name.

FIG. 24.19

A shortcut for a file will save time and energy.
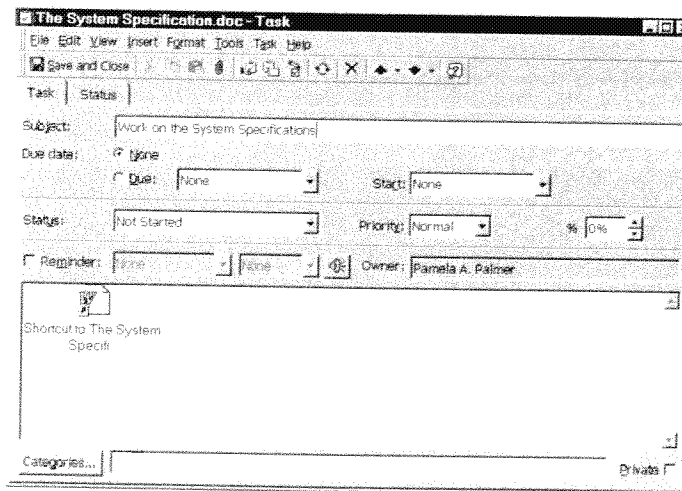
Shortcuts and attachments help to minimize the steps needed to accomplish your goals. Planning what files and Web sites are needed ahead of time will save you steps in the long run.

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N O T E   The one drawback is that you cannot do this with a Word template. If you add a Word template as a shortcut or attachment, and then later double-click it to open it, you will open the template itself and not a new instance of the template.

From Here...

Outlook enables you to create new items using information in existing items as a model. This can save you a lot of time when you are creating related items. You can also take advantage of this with files and Web sites. You can plan a task or appointment and create a link to the files or Web sites that will be required to complete the job.

This can also simplify the process of sending files or Web sites to others. The objective is to minimize the time needed to manage your work. Microsoft Outlook provides AutoCreate to reduce some of your entry time, as well as automatic journal entry for specific items and Office files.

- To get more details about keeping track of your tasks, see Chapter 4, "Tracking Personal Tasks."

- To learn more about managing your contacts, see Chapter 5, "Creating and Using Contacts."

- For more information on creating journal entries, see Chapter 7, "Recording Your Activities."

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Sending Options

This tab, shown in Figure B.15, provides several options that affect messages you send.

FIG. B.15
Use the options in this tab to control messages you prepare for sending.

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B
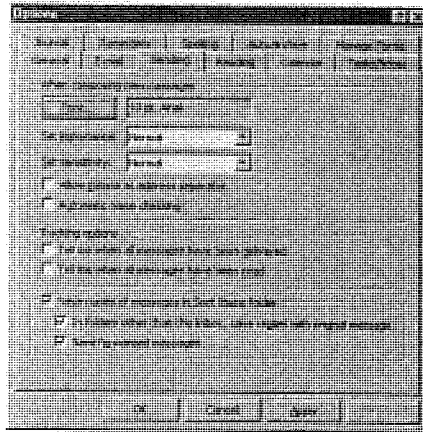
Choosing a Font

By default, Outlook uses 10-point Arial for your messages. If you want to use a different font, click Font and choose from the fonts installed on your computer.

Setting Importance and Sensitivity

By default, Outlook marks your messages as having normal importance and normal sensitivity. If you want to change the default importance, open the Set Importance list box and choose among Low, Normal, and High.

If you want to change the default sensitivity, open the Set Sensitivity list box and choose among Normal, Personal, Private, and Confidential.

Allowing Commas as Address Separators

By default, Outlook requires semicolons to separate names in To, Cc, and Bcc boxes in a message. Place a check mark in the Allow Comma as Address Separator check box to allow the use of commas, as well as semicolons.

Using Automatic Name Checking

By default, Outlook does not check names you enter manually in the To, Cc, and Bcc boxes in a message. Place a check mark in the Automatic Name Checking check box if

you want Outlook to check that the names you enter exist in your address book. After Automatic Name Checking is enabled, Outlook marks names it doesn't find in your address book with a red wavy line.

Setting Tracking Options

By default, Outlook doesn't send you an acknowledgment when a message you send is received at the recipients postoffice. If you want to receive an acknowledgment, place a check mark in the Tell Me When All Messages Have Been Delivered check box.

By default, Outlook doesn't send you an acknowledgment when a recipient opens your message to read it. If you want to receive an acknowledgment, place a check mark in the Tell Me When All Messages Have Been Read check box.

Saving Messages You Send

By default, there's a check mark in the Save Copies of Messages in Sent Items Folder check box. As a result of this, Outlook saves all the messages you send in the Sent Items subfolder. Remove this check mark if you don't want to save messages you send.

Also, by default, the two bottom check boxes contain check marks. By checking the first of these, replies you send from the Inbox are saved in the Sent Items subfolder; replies you send from any other subfolder are saved in that folder. If you remove this check mark, all replies are saved in the Sent Items subfolder.

The check mark in the second check box causes Outlook to save messages you forward in the Send Items subfolder. If you remove this check mark, forwarded messages are not saved.

Spelling Options

Use this tab, shown in Figure B.16, to select spell checking options.

Outlook uses Word's facilities for spell checking. Consequently, spell checking is not available if you use RichEdit as your e-mail editor.

Place check marks in any or all of the five check boxes to enable specific aspects of spell checking. The purpose of each check box is self-explanatory.

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GLOSSARY

Glossary

by Gordon Padwick

This glossary lists terms and abbreviations you might come across while you're working with Outlook. It does not provide broad definitions that necessarily apply in other environments. ■

Account   See *User Account.*

Action   A basic operation that an application can perform, such as opening, closing, or deleting an object.

Actions Collection   A collection of Action objects, each of which represents an action that can be performed by an Outlook item. Use this collection in Visual Basic Script code to refer to actions.

Activity   An appointment, event, or meeting. Activities can be one-time or recurring.

Add-In   A software component that can be added to Outlook to provide extra functionality. Some add-ins are provided with Outlook; others are available from third-party suppliers. Add-ins provided with Outlook are in the ValuPack folder on the Office 97 CD-ROM.

Address Book   A folder that contains names of contacts and their addresses.

Administrator   The person who controls a workgroup or LAN.

Age   The length of time since an Outlook item was created or modified.

America Online (AOL)   An organization that offers information and communication facilities (including Internet access) to computer users.

AOL   See *America Online.*

API   See *Applications Programming Interface.*

Application Object   The top-level object of an application. Outlook's Application object contains the entire Outlook application. Use this object in Visual Basic or Visual Basic for Applications (VBA) when making an external reference to Outlook.

Applications Programming Interface (API)   A set of functions that may be used by programs running under Windows.

Appointment   A period blocked for a specific purpose in an Outlook user's personal calendar.

Archive   A file that contains Outlook items that are older than a specific age. When Outlook archives items, it moves those items from current folders to an archive folder.

Assistant Object   An object that represents the Office Assistant. Use this object in Visual Basic Script code to display or hide the Office Assistant.

Attachment   A file that is sent with a message.

Attachments Collection   A collection of Attachment objects, each of which represents an attachment to an Outlook item. Use this collection in Visual Basic Script code to access attachments.

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AutoAddress   Outlook's capability to separate an address into street, city, state, postal code, and country fields.

AutoArchive   Outlook's capability to move items of a specific age from the Personal Folders subfolders into an archive folder.

AutoCreate   Outlook's capability to automatically convert an item of one type into an item of another type.

AutoDate   Outlook's capability to convert a description of a date into a specific calendar date, and also to convert a description of a time into a specific time.

AutoJournal   Outlook's capability to automatically create journal items that record activities involving specific contacts and the use of Office applications.

AutoName   Outlook's capability to separate a person's full name into title, first name, middle name, last name, and suffix fields.

AutoName Check   Outlook's capability to verify that names entered into To, Cc, and Bcc boxes exist in an Address Book.

AutoPreview   Outlook's capability to display the first three lines of a message without the user having to open the message.

Balloon   The message box used by the Office Assistant to display information.

BASIC   See *Beginners All-Purpose Symbolic Instruction Code.*

Basic Input/Output System (BIOS)   A set of routines, usually in ROM, that support transfer of information between such computer hardware components as the keyboard, disks, memory, and monitor.

Bcc   See *Blind Copy.*

Beginners All-Purpose Symbolic Instruction Code (BASIC)   A high-level programming language initially developed as a means to teach programming. It has subsequently been developed into such programming languages as Visual Basic, Visual Basic for Applications (VBA), and Visual Basic Script (VBS).

BIOS   See *Basic Input/Output System.*

Blind Copy (Bcc)   A copy of a message that is sent without the recipient's name appearing on the copies that other people receive. Bcc is an acronym for "Blind carbon copy."

Browser   An application that helps a user find information on the World Wide Web.

Calendar   A component of Outlook in which users plan and keep records of their activities. Calendar creates items for appointments, events, and meetings.

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Card   The information Outlook provides about a contact.

Card View   One of the types of views Outlook can create. Card view is used to display contact information as it might appear on a business card.

Category   An identifier for an Outlook item. One or more categories may be assigned to each item. Categories can also be assigned to forms.

Cc   See *Copy To.*

Client   A computer, or software running on that computer, that accesses data or services on another computer.

Client/Server   A LAN or WAN configuration in which one or more computers (servers) provide services to users' computers (clients).

Command Bars Collection   A collection of Command Bar objects, each of which contains a menu or toolbar. Use this collection in Visual Basic Script code to create, change, and display menus and toolbars.

CompuServe   An organization that offers information and communication facilities (including access to the Internet) to computer users. Outlook can send and receive CompuServe e-mail messages.

Contact   The name of a person or organization. Outlook maintains a list of contacts in the Contacts subfolder. Each contact item contains information about one contact.

Contact List   The list of contacts maintained by Outlook.

Control   An object on a form that is used to obtain user input and to display output. Controls available in Outlook are: CheckBox, ComboBox, CommandButton, Frame, Image, Label, ListBox, MultiPage, OptionButton, ScrollBar, SpinButton, TabStrip, Textbox, and ToggleButton.

Control Panel   A window in Windows 95 and Windows NT that provides access to the fundamental Window components. To access the Control Panel, choose Start, Settings from the Windows taskbar.

Conversation   The subject of an appointment, event, meeting, or message.

Copy To (Cc)   The name of a person to whom an e-mail message is copied. The Cc names are included on the messages sent to all recipients. Cc is an acronym for "Carbon copy."

Data Link   See *Timex Data Link.*

Date Navigator   The section of the Calendar Information Viewer that shows one or more complete months.

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Day/Week/Month View   A view of Calendar items. With this view selected, you can choose to display detailed calendar information for a day, a week, or a month.

Deleted Items   The folder that contains items that have been deleted from other Outlook folders.

Document   Something created in an Office application, such as a table created in Access, text created in Word, a workbook created in Excel, or a presentation created in PowerPoint.

Drag and Drop   The facility provided within Office applications that lets users select an object in one Office application and use the mouse to drag that object into another application.

E-mail   A message sent from one computer user to other users. Most messages consist only of text, but messages may include any type of information that can be created on a computer. Users who interchange e-mail messages may use the same computer, may be part of a workgroup, may be interconnected by way of a LAN or WAN, or may use a messaging service provider.

Embedded Object   An object included within another object. The included data consists of the object's native data and presentation data.

Encryption   A means of limiting access to data by converting the data into apparently meaningless form. Only people who have the key to the encryption can reverse the process to make the data meaningful.

Event   In general terms, something that happens and is recognized by the computer so that an appropriate action can be taken. In Outlook terms, an event is an activity that occupies one or more days but does not require the user to block time.

Exchange Client   The predecessor of Outlook introduced in Windows 95. Exchange Client provides messaging capabilities similar to those in Outlook, but does not contain scheduling, or contact capabilities. Microsoft now refers to Exchange Client as Windows Messaging in Windows 95 and Windows NT. Exchange Client is still shipped with Exchange Server.

Exchange Server   An e-mail server that runs under Windows NT Server. The Exchange Server information service can be added to an Outlook profile to enable Outlook to exchange messages with Exchange Server.

Explorer   The Outlook window that displays the contents of a folder or subfolder.

Explorer Object   An object that contains what is displayed by the Explorer. Use this object in Visual Basic Script code to access folders.

Favorites   A list of World Wide Web sites maintained in Internet Explorer that provides easy access to those sites.

Fax   An abbreviation of "facsimile." A method of transmitting text and graphics over telephone lines in digital form. Outlook can send and receive fax messages.

Fax Viewer   A facility that can display outgoing fax messages. Fax Viewer can also be used to display fax messages on a computer on which the Microsoft Fax information service is not installed.

Field   An area of memory that contains a specific type of information. Also, a space on a form that displays a specific type of information or in which a user can provide specific information. Outlook uses a separate field for each type of information an item can contain; fields are used for such information as First Name, Middle Name, Last Name, Street Address, City, and so on.

Field Chooser   A list of fields that can be used to add fields to a form.

Field Type   The type of data a field can contain. Each Outlook field can contain one of the following types of data: combination, currency, date/time, duration, formula, integer, keywords, number, percent, text, and yes/no.

File   The basic unit of storage on such media as disks and tape. Since the introduction of Windows 95, the word "folder" is used instead of "file."

File Transfer Protocol (FTP)   A common way of formatting files to be sent from one computer to another by way of the Internet.

Filter   An Outlook facility used to access information that satisfies certain specified criteria. The specified criteria refer to contents of fields. Filters can be used to find items that contain certain text in text fields, certain dates (or ranges of dates) in date fields, and certain values (or ranges of values) in numeric fields.

Flag   An indication in a message that some follow-up activity is necessary. Messages are indicated as flagged by the flag symbol in the Flag Status column of the message list.

Folder   A synonym for "file." Outlook uses a folder named "Personal Folders" to store items. This folder contains several subfolders, one for each type of item. Each folder contains either subfolders or items of a specific type. Users can augment the initial folder structure by adding a hierarchy of subfolders.

Folders Collection   A collection of MAPIFolder objects, each of which represents a folder or subfolder. Use this collection in Visual Basic Script code to refer to folders and subfolders.

Form   An on-screen box used to display and collect information. Outlook provides forms for such purposes as creating and viewing messages, appointments, and contact information. These forms can be modified to suit custom needs.

Form Description Object   An object that contains Outlook's general properties for a form—the properties you see in the Properties tab of a form in Design view. Use this object in Visual Basic code to refer to a form's properties.

Forward   To send a received message to someone else.

FTP   See *File Transfer Protocol*.

Function   A unit of program code that can be accessed from other code, performs some operation, and returns a value to the code from which it was accessed.

Gateway   A capability to transmit data from one information system to another. For example, a gateway allows exchange of messages between an Internet message server and the CompuServe messaging system.

Group   To separate items displayed in a list or timeline into sections, each of which contain items with a common characteristic. For example, a list of contacts can be grouped by category, company, or other characteristics.

HTML   See *Hypertext Markup Language*.

HTTP   See *Hypertext Transport Protocol*.

Hypertext   Text that contains links to other text in the same document or to text in other documents.

Hypertext Markup Language   A language used to create hypertext documents for use on the World Wide Web.

Hypertext Transport Protocol (HTTP)   The protocol used for sending hypertext documents on the Internet.

Importance   In Outlook, messages are marked to have high, normal, or low importance.

Inbox   The information viewer that displays messages received but not moved to another folder. Items displayed in this information viewer are stored in the Inbox subfolder.

Information Viewer   The section of an Outlook windows that displays a specific type of item. Each information viewer displays items from a specific folder or subfolder.

Inspector   A window in which you can see the properties of an Outlook object.

Inspector Object   An object that contains the properties of an item. Use this object in Visual Basic Script to access item properties.

Integrated Services Digital Network (ISDN)   A communications system by which many types of information can be transmitted at high speed over normal telephone lines.

IntelliSense   The capability of the Office Assistant to offer assistance with a user's current task. The Office Assistant automatically senses what a user is currently doing and provides relevant help suggestions.

Internet   A worldwide, interconnected system of computers that provide information and communication services.

Internet Explorer   An Internet browser from Microsoft.

Internet Protocol (IP)   The protocol that controls message routing on the Internet.

Internet Service Provider (ISP)   An organization that provides access to the Internet.

IP   See *Internet Protocol.*

ISDN   See *Integrated Services Digital Network.*

ISP   See *Internet Service Provider.*

Item   A unit of information in Outlook. E-mail messages, appointments, contacts, tasks, journal entries, and notes are all items.

Items Collection   A collection of Item objects, each of which represents one of Outlook's fundamental types of items: Appointment, Contact, Journal Item, Mail Message, Note, Post, and Task. Use this collection in Visual Basic Script code to refer to item types.

Journal   The Outlook facility for creating journal entry items that automatically records such activities as working with Office applications, and sending and receiving e-mail messages. Users can manually record other activities as journal entry items.

LAN   See *Local Area Network.*

Linked Object   An object included within another object. The included data consists of the object's presentation data and a reference to its native data.

Local Area Network   A computer network limited to a small area, such as one building.

Location   The place where an appointment, event, or meeting is to occur.

Log   A record of a specific type of event. For example, Outlook can create an event log that marks the completion of each CompuServe e-mail session.

Mail Client   A computer, or the software running on a computer, that can receive e-mail from and send e-mail to a mail server.

Mail Server A computer, or the software running on a computer, that provides mail services to mail clients. These services include storing messages sent by mail clients until the recipient mail clients retrieve those messages.

Mailbox The space on a mail server dedicated to storing messages intended for a specific mail client.

MAPI See *Messaging Application Programming Interface.*

MAPIFolder Object An object that contains the contents of a folder or subfolder. Use this object in Visual Basic Script code to access an item within a folder or subfolder.

Master Category List A list of categories from which a user can choose to assign one or more categories for each item.

Meeting In Outlook, a period blocked by two or more users for the purpose of a face-to-face or other meeting (such as a conference call).

Menu Bar The row immediately under the title bar in a window that contains menu names. Each menu is displayed by clicking its menu name.

Message Information created by one user in a format suitable for transmission by a messaging system, or information received from a messaging system.

Message Status An indication, marked by a flag, of something special about a message.

Messaging The capability to send e-mail from one computer user to another.

Messaging Application Programming Interface (MAPI) A set of API functions and an OLE interface that Outlook and other messaging clients use to interface with message service providers.

Method An action defined within an object. Each of Outlook's objects contains certain methods.

Microsoft Exchange See *Exchange Client* and *Exchange Server.*

Microsoft Fax A set of API functions that Outlook and other Windows applications can use to send and receive Fax messages.

Microsoft Mail A set of API functions that Outlook and other Windows applications can use to send and receive e-mail messages within a workgroup.

Microsoft Network A system that offers information and communication facilities (including access to the Internet) to computer users. Outlook can send and receive e-mail Microsoft Network messages.

Microsoft Outlook A desktop information manager that includes comprehensive messaging, scheduling, and information management capabilities.

Microsoft Word   A word processor that can be chosen as Outlook's e-mail editor. When used in this way, Word is known as WordMail.

Modem   A device that converts digital information into analog (sound) suitable for transmission over telephone lines, and also converts incoming analog (sound) information into digital form.

My Computer   An icon that provides access to folders on any disk on an Outlook user's computer and to disks that other network users have shared.

My Documents   A list of documents recently created in, or modified by, an Office application. Click the My Documents shortcut in the Outlook Bar to access this list.

NameSpace Object   The object that contains Outlook data in MAPI format. Use this object in Visual Basic Script code to refer to Outlook components.

Native Data   One of the two types of data associated with an OLE object (the other type is Presentation Data). Native data consists of all the data needed by an application to edit the object.

Navigator   An Internet browser from Netscape.

NetBEUI   See *NetBIOS Extended User Interface*.

NetBIOS   See *Network Basic Input/Output System*.

NetBIOS Extended User Interface   Provides data transport services for communication between computers.

Network   Interconnected computers. In a client/server network, a server provides services to clients (individual users). In a peer-to-peer network, any computer can act as a client or a server.

Network Basic Input/Output System (NetBIOS)   Establishes communication between computers in a network.

Network Interface Card (NIC)   An electronic assembly (often a circuit board) that connects a computer to a network. Each computer must have a network interface card to be part of a network.

NIC   See *Network Interface Card*.

Node   A computer, printer, or other device connected to a network.

Note   A type of Outlook item. A note consists of data that will be subsequently used for any other purpose.

Object   An entity that may contain data and have properties and methods. OLE associates presentation data and native data with objects. Outlook, and other Office applications, contains a hierarchical structure of objects.

Object Linking and Embedding (OLE)   The technology by which objects may be embedded into, or linked to, other objects. Outlook uses OLE to incorporate various kinds of objects into messages and other items.

Object Model   The hierarchy of an application's components. In common with other Office applications, Outlook's object model consists of a tree structure branching from the Application object.

Off Hook   The condition in which a telephone or modem is connected to a telephone line. The word "hook" refers to an old-fashioned pedestal-type telephone.

Office Assistant   The animated object that may be displayed in an Outlook window to provide help with whatever task a user is attempting.

On Hook   The condition in which a telephone or modem is not connected to a telephone line.

Out of Office Assistant   A facility within Exchange Server that automatically answers or forwards messages. This facility is only available in Outlook when the profile in use includes the Exchange Server information service and a network connection to Exchange Server is available.

Outbox   The information viewer that displays messages created but not sent. Items displayed in this information viewer are stored in the Outbox subfolder.

Outlook   See *Microsoft Outlook.*

Outlook Bar   The bar at the left side of Outlook's information viewers that contains shortcuts to other information viewers.

Pages Collection   A collection of Page objects within the Inspector object. Use this collection in Visual Basic Script code when referring to Inspector objects that have been changed.

Password   A private sequence of characters a user types to gain access to a computer or to specific applications running on a computer. In Outlook, profiles can be set up so that a password is necessary in order to use them.

Peer-to-Peer Network   A network in which each connected computer can be a client and a server.

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Permission   Operating systems (such as Windows) and applications (such as Exchange Server) can be set up in such a way that only those people who know certain passwords have access to specific parts of the system. Having access is known as a permission.

Personal Address Book   An address book that contains an Outlook user's private list of people's names and information about those people. A personal address book can be used to create distribution lists.

Personal Folders   The set of subfolders in which Outlook stores items. Outlook creates a separate subfolder for each type of item. Users can add their own hierarchies of subfolders and subsequently move items from one subfolder to another.

Polling   The process of periodically connecting to a messaging service to ascertain whether messages are waiting and, if so, to move those messages into Outlook's Inbox. At the same time, any messages for that service waiting in Outlook's Outbox are sent.

POP3   See *Post Office Protocol 3*.

Post   A facility in Exchange Server that allows messages to be placed in a public folder for all users to see.

Post Office Protocol 3   A messaging protocol commonly used by Internet messaging service providers.

Postoffice   A facility on a network that maintains information, including mailbox addresses, about each user and manages the process of sending and receiving messages.

Presentation Data   One of the two types of data associated with an OLE object (the other type is Native Data). Presentation data consists of all the data needed by an application to render the object on a display device.

Private   Items, such as appointments and contacts, that are marked so that they are only available to the person who created them.

Profile   A set of information that defines a specific Outlook session. A profile defines the information services to be used and the passwords required to access those services. Each profile may be protected by a password.

Property   A characteristic of an object such as an Outlook item, form, or an object on a form. Properties include such characteristics as a name, the position of an object on a form, the font used by the object, and various settings.

Protocol   A set of rules that define how computers communicate. A protocol may contain other protocols.

Publish   To make items available for other people to read. Also, to save the structure of a form together with any VBS code the form contains (compare with Save).

Recall The capability to retrieve a message that has been sent. Outlook can recall messages that recipients haven't read, but not those messages that have been read.

Recipient A person to whom a message is addressed.

Recipients Collection A collection of Recipient objects, each of which represents a recipient of an Appointment, Journal, Mail, or Task item. Use this collection in Visual Basic Script code to refer to a recipient.

RecurrencePattern Object An object that represents the recurrence pattern for an Appointment, Event, Meeting, or Task item. Use this object in Visual Basic Script code to refer to an item's recurrence pattern.

Recurring An appointment, event, meeting, or task that occurs regularly.

Registry Two Windows 95 files that maintain up-to-date information about a computer's hardware and software configuration, and also about users. Outlook's profiles and master category list are maintained in the Registry. Windows NT uses more than two files for Registry data.

Reminder A visual or audible warning Outlook gives a certain time before an item is due. Outlook can provide reminders before appointments, meetings, events, and task due dates.

Rich Text Format (RTF) A method of formatting text so that documents can be transferred between various applications running on different platforms. Outlook can use RTF.

RichEdit The e-mail editor used by Outlook unless Word is chosen.

RTF See *Rich Text Format.*

Rule A directive for how messages are to be handled by Exchange Server.

Save To preserve data as a file, or within a file, on a disk. In the context of a form, to preserve the data contained in a form, but not the form's structure or underlying VBS code (compare with Publish).

Schedule+ A scheduling application provided with Office 95 and now superseded by the scheduling facilities within Outlook.

Sender The name of the person who sends a message, or on behalf of whom a message is sent.

Sensitivity In Outlook, a sender can mark a message as having normal, personal, private, or confidential sensitivity. A message recipient cannot change the sensitivity.

Sent Item   A message that has been successfully sent to a mail server. Outlook automatically moves sent items from the Outbox subfolder to the Sent Items subfolder.

Server   A computer, or the software running on that computer, that provides services to client computers. One server computer may have several server applications; for example a server computer running Windows NT Server may provide SQL Server and Exchange Server (and other) services.

Service Provider   An organization that provides access to a computer-related service. An Internet Service Provider (ISP) provides access to the Internet.

Shortcut   A link to information in a folder or a link to an application.

Simple Mail Transport Protocol (SMTP)   A protocol used by the Internet for transmitting messages.

SMPT   See *Simple Mail Transport Protocol.*

Status Bar   The row at the bottom of a window that displays certain information about what is displayed in the rest of the window. The status bar at the bottom of Outlook's information viewers displays a number that shows how many items the displayed subfolder contains.

Status Report   Information about the progress of a task assigned to another person.

Subfolder   A component of a folder. In Outlook, a folder may have many subfolders. Each subfolder contains items of a specific type and may contain other subfolders.

Subject   A brief description of an appointment, event, meeting, or message. In some places, Outlook uses "conversation" as a synonym for "subject."

Synchronize   To update folder contents. For example, you can use Outlook offline (not connected to a postoffice or server). When you re-establish communication with the postoffice or server, you can synchronize your folders so that your local, postoffice, and server all contain the most recent data.

Table View   A display of items in a folder or subfolder arranged in rows and columns. Each row contains information about one item. Each column contains information in a specific field.

Task   An Outlook item that describes something to be done. A task may have a due date and start date. The person who creates a task item can assign that task to another person. A person who receives an assigned task can accept or reject the assignment and can reassign it to someone else.

Taskbar   The bottom row of the Windows Desktop that displays the Start button and buttons representing each active application.

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TaskPad The pane at the bottom right of the Calendar information viewer that contains a list of current tasks.

TCP See *Transmission Control Protocol*.

TCP/IP See *Transmission Control Protocol/Internet Protocol*.

Team Manager A Microsoft application that extends the task management facilities within Outlook.

Template An item that can be used as the basis for creating other items.

Time Bar The column of times at the left side of the Calendar information viewer when Day is displayed in the Day/Week/Month view.

Timeline View A view of Journal and other items plotted in relation to time.

Timex Data Link A protocol for transmitting information to a Timex Data Link watch and to other compatible devices.

Toolbar The row (usually under the menu bar) containing buttons that provide quick access to often-used facilities.

ToolTip The temporary box that appears under a Toolbar button to identify that button.

Transmission Control Protocol (TCP) The protocol that controls delivery of sequenced data.

Transmission Control Protocol/Internet Protocol (TCP/IP) A combination of the TCP and IP protocols that controls message routing and delivery over a network.

UserProperties Collection A collection of UserProperty objects, each of which represents the custom properties of an item. Use this collection in Visual Basic Script code to refer to an item's custom properties.

Uniform Resource Locator (URL) The address of a resource on the World Wide Web (WWW).

Universal Inbox See *Inbox*.

URL See *Uniform Resource Locator*.

User A person using Outlook or another application.

User Account A person who has access to a network is said to have a user account.

VB See *Visual Basic*.

VBA See *Visual Basic for Applications*.

VBS See *Visual Basic Script*.

View   A manner in which Outlook displays information in an information viewer. A user can select from several standard views and can also create custom views.

Visual Basic (VB)   A programming environment (much more than a programming language) based on BASIC that can be used to create Windows applications.

Visual Basic for Applications (VBA)   Dialects of Visual Basic that are tailored for developing applications for Office components (Access, Excel, PowerPoint, and Word).

Visual Basic Script (VBS)   A subset of Visual Basic for Applications, originally developed for working with hypertext documents, but now also used for developing extended capabilities in Outlook.

Voting   A capability of Outlook and other MAPI-compatible applications for sending a message in which recipients are asked to reply indicating their choice among two or more answers to a question.

WAN   See *Wide Area Network.*

Wide Area Network (WAN)   A network that covers an area larger than a single building.

Wizard   A sequence of dialog boxes that help a user step through what might otherwise be a complex operation.

Word   See *Microsoft Word.*

WordMail   A name used to refer to the Word word processor when it is used as the Outlook e-mail editor.

Workgroup   Two or more people using Windows 95 or Windows NT Client whose computers are interconnected to form a peer-to-peer network.

World Wide Web (WWW)   Hypertext servers interconnected by way of the Internet that give users access to text, graphics, and sound files.

WWW   See *World Wide Web.*

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