

Gordon Padwick



Special Edition
Using

Using

MICROSOFT®

Outlook™ 97

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Guide to the Best of Outlook 97 Features

Feature	Page
Outlook Overall	
✓ Share categories among all Outlook items	68
★ Display items in tables or on a timeline	83
✓ Get automatic reminders for appointments, meetings, and tasks	61
Automatically archive outdated items	296
✓ Use Outlook data with all Office applications	151
✓ Use Outlook to find anything on your disks	259
Calendar and Contacts	
Keep a personal calendar of appointments, events, and meetings	59
✓ Mark holidays and special events	77
★ Find out when people are available for meetings	358
✓ Remember birthdays, anniversaries, and your contacts' interests	78
Automatically address e-mail and snail-mail	219
Click to place a phone call	141
✓ Click to access a contact's Internet site	503
Customizing Outlook	
Create your own views of items	101
★ Use the many customized applications available from Microsoft's Outlook Web site	502
✓ Design your own forms	660
✓ Enhance Outlook with Visual Basic Script code	683
E-mail and Snail-mail	
Attach any file to an e-mail message you send	231
★ Use the Rules Wizard to tell Outlook how to handle your incoming e-mail	256
✓ Keep all your e-mail and fax messages organized	231
Send e-mail and snail-mail to distribution lists	343
Journal and Notes	
✓ Automatically track all your work in Office applications	172
✓ Log your e-mail activity	173
✓ Keep records of your phone calls	181
✓ Instantly create sticky notes	152
Tasks	
✓ Assign tasks to others	417
★ Use Team Manager to track group tasks	428

Rating System ★ = Star feature or enhancement ✓ = Worth checking out No symbol = New feature or enhancement



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OUTLOOK 97

Written by Gordon Padwick with

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

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Special Edition Using Microsoft Outlook 97

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

About the Authors

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Gordon Padwick

January, 1997

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Contents at a Glance

I | Getting Started with Outlook

- 1 Outlook Overview 11
- 2 Exploring Outlook 23
- 3 Scheduling Personal Activities 47
- 4 Tracking Personal Tasks 93
- 5 Creating and Using Contacts 121
- 6 Using Notes 151
- 7 Recording Your Activities 169
- 8 Preparing to Work with Microsoft Mail E-mail 185
- 9 Receiving and Sending Microsoft Mail Messages 211
- 10 Finding Items and Files 259
- 11 Archiving Items 291

II | Exploring Outlook's Broader Capabilities

- 12 Working with Profiles 309
- 13 Working with Folders and Address Books 321
- 14 Planning Meetings 353
- 15 Customizing Your Calendar 369
- 16 Organizing Your Tasks 395
- 17 Assigning Tasks 415
- 18 Organizing Your Journal 431
- 19 Providing More Information About Contacts 443
- 20 Sending and Receiving Internet E-mail 459
- 21 Exploring the Web 479
- 22 Sending and Receiving E-mail from Other Services 513
- 23 Sending and Receiving Faxes 545
- 24 Creating Items Automatically 571
- 25 Exporting and Importing Items 595
- 26 Working Remotely 623

III | Developing Outlook Applications

- 27 Modifying and Creating Forms 651
- 28 Working with Visual Basic Script 683
- 29 Using the Outlook Object Model 727

IV | **Appendixes**

- A Installing Outlook 773
- B Setting Outlook's Options 777
- C Outlook's Standard Folders, Files, and Fields 797
- D Reference Sources 805

Glossary 809

Index 825

Table of Contents

Introduction 1

- Understanding Outlook 2
- Who Should Read This Book? 4
- What You'll Learn in This Book 4
- Special Features in the Book 7
- Final Comment 8

Getting Started with Outlook

1 Outlook Overview 11

- Putting Outlook into Perspective 12
 - Looking at Outlook from a Distance 12
 - Taking a Closer Look 13
- Using Outlook 17
 - Managing Your Time 17
 - Organizing Your Information 18
 - Communicating with Other People 20
 - Archiving Items 20
- Developing a Custom Outlook Environment 21
- From Here... 21

2 Exploring Outlook 23

- Starting Outlook 24
- Using Information Services 27
- Understanding the Outlook Window 27
 - Using the Inbox Menu Bar 29
 - Using the Toolbar 29
 - Using the Outlook Bar 30
 - Information Viewer 35
 - Viewing the Folder List 36
- Navigating in Outlook 38
- Getting Help While You Work 38

- Getting Results with Microsoft Office for Windows 97 39
- Using the Office Assistant 39
- Getting ScreenTips 42
- Referring to Online Help 43
- Getting Support on the Web 43
- Closing Outlook 45
- From Here... 45

3 Scheduling Personal Activities 47

- Understanding Calendar 48
 - Understanding the Day View 49
 - Understanding the Week View 54
 - Understanding the Month View 56
 - Switching Among Calendar Views 57
- Understanding Appointments, Meetings, and Events 58
- Setting the Calendar Options 59
- Creating a New Appointment 59
 - Entering the Subject and Location 60
 - Entering Start and End Times 60
 - Setting a Reminder 61
 - Assigning Your Time 63
 - Describing Your Appointment 63
 - Choosing a Category 63
 - Making the Appointment Private 64
 - Saving the Appointment 64
 - Viewing an Appointment in Your Calendar 64
 - Creating an Appointment on Your Calendar 66
- Typing Dates and Times 66
 - Typing Dates 67
 - Typing Times 67
- Working with Categories 68
 - Using the Master Category List 68
 - Deleting Categories from the Master Category List 69
 - Adding Categories to the Master Category List 70
 - Resetting the Master Category List 70
 - Changing Categories Assigned to an Item 71

Creating a Recurring Appointment	71
Creating a Recurring Appointment from Scratch	71
Displaying a Recurring Appointment	74
Changing a One-Time Appointment to a Recurring Appointment	75
Creating a One-Time Event	75
Creating a Recurring Event	77
Marking Holidays on Your Schedule	77
Marking Holidays and Special Days Automatically	78
Marking Holidays and Special Days Manually	79
Editing Your Schedule	80
Changing Text in a One-Time Appointment or Event	80
Changing the Time and Duration for a One-Time Appointment	80
Changing the Date of a One-Time Appointment	81
Deleting a One-Time Appointment	81
Changing Recurring Appointments and Events	82
Using Calendar Views	83
Using Standard Calendar Views	84
Modifying the Standard Views	88
Creating Custom Views	88
Understanding Filters	88
Printing Your Schedule	91
From Here...	92
4 Tracking Personal Tasks	93
Beginning to Work with Tasks	94
Creating a Task	95
Entering the Subject	95
Entering Due and Start Dates	96
Defining the Status	97
Setting a Reminder	97
Owning a Task	97
Entering Notes	98
Assigning Categories	98
Making a Task Private	98
Attaching a File to a Task	98

- Saving a Task 98
- Displaying Tasks in the Calendar 98
- Editing and Updating a Task 100
- Viewing Your Tasks 101
 - Changing the Order of Tasks in a View 102
 - Formatting Fields 103
 - Adding and Removing Fields 104
 - Grouping a View 108
 - Filtering Task Views 111
 - Saving a Modified View 112
 - Deleting a View 112
 - Working in More Detail with Views 113
 - Working with the Timeline View 113
- Creating Recurring Tasks 116
- Creating an Item from a Different Type of Item 117
 - Converting an Appointment into a Task 117
 - Converting a Task into an Appointment 119
- Printing Tasks 119
- From Here... 120

5 Creating and Using Contacts 121

- Creating Contacts Items 122
 - Creating Basic Information About a New Contact 123
 - Editing Contact Information 130
 - Entering Additional Contact Information 131
 - Creating Automatic Journal Entries 131
 - Using Other Fields 132
 - Entering More Contacts at the Same Company 134
- Viewing Contact Items 134
 - Using Standard Contact Views 134
 - Creating Custom Views 135
- Using Your Contact Information 138
 - Designating Your Contacts Subfolder as an Outlook Address Book 139
 - Dialing Phone Numbers 140
 - Using Contact Information in Word Documents 143
- Printing Contact Information 150
- From Here... 150

6 Using Notes 151

- Understanding the Notes Information Viewer 152
- Creating a Note 152
 - Entering the Text 153
 - Changing Note's Default Settings 154
 - Opening a Note 155
 - Changing a Note's Color 155
 - Assigning Categories to a Note 156
- Viewing Notes 157
 - Using the Standard Views 157
 - Modifying Views 158
 - Deleting a Note 158
- Using Notes 159
 - Creating Notes While You Work 160
 - Saving a Note as an Appointment 160
 - Saving a Note as a Contact 161
 - Sending a Note as a Message 163
 - Copying a Note to Another Application 163
- Creating a Note from Another Item 165
- Printing a Note 166
- From Here... 167

7 Recording Your Activities 169

- Taking a First Look at Journal 170
- Recording Activities Automatically 172
 - Selecting Items to Record 172
 - Recording File Activity 174
 - Determining What Happens When You Open a Journal Entry 174
- Creating Journal Entries Manually 175
 - Defining a Journal Entry 176
 - Creating a Contact Journal Entry 178
 - Timing Activities 178
- Viewing Journal Entries 179
 - Using Standard Views 179
 - Modifying Views 183
 - Editing a Journal Entry 183

- Deleting a Journal Entry 183
- Printing Journal Entries 183
- From Here... 184

8 Preparing to Work with Microsoft Mail E-mail 185

- Preparing to Receive and Send Messages 186
- Choosing an E-mail Editor 186
- Connecting to a Workgroup 187
- Establishing a Workgroup Postoffice 188
 - Creating the Postoffice 188
 - Creating Postoffice Mailboxes 192
 - Deleting and Changing Postoffice Mailboxes 194
- Adding and Configuring Microsoft Mail 194
 - Adding the Microsoft Mail Information Service 195
 - Configuring the Microsoft Mail Information Service 196
 - Changing Your User Password 200
- Selecting E-mail Options 201
 - Checking for New Mail 202
 - Being Alerted to Mail Arrival 202
 - Processing New Mail 204
 - Choosing an E-mail Editor 204
- Inspecting Your Log File 205
- Preparing Subfolders and Categories 206
 - Creating Subfolders 206
 - Working with Mail Categories 208
- From Here... 209

9 Receiving and Sending Microsoft Mail Messages 211

- Preparing to Receive and Send Workgroup Messages 212
 - Understanding the Inbox Information Viewer 212
 - Deleting a Message 214
 - Indicating Message Status 214
- Sending and Receiving a Simple Message 217
 - Confirming Your Setup 217
 - Creating a Message 218
 - Sending the Message 220

Receiving the Message	221
Being Notified When a Message Arrives	222
Being Notified When Mail Arrives	222
Being Notified About Delivery Problems	223
Sending a Message Later	225
Sending More Sophisticated Messages	228
Formatting the Text	228
Assigning Categories to a Message	231
Inserting a File or Item into a Message	231
Inserting an OLE Object	235
Automatically Inserting Your Signature	237
Setting the Importance and Sensitivity of a Message	238
Flagging a Message	240
Using Voting Buttons	243
Saving Mail Items	245
Setting Tracking Options	247
Replying to and Forwarding Messages	249
Replying to a Message	249
Forwarding a Message	251
Annotating a Message	251
Having Replies Sent to a Different Person	252
Recalling a Message	253
Viewing Messages	254
Printing Messages	255
From Here...	256

10 Finding Items and Files 259

Finding E-mail Messages You've Received	260
Specifying the Type of Item	260
Reading a Listed Message	262
Looking for Words and Phrases	263
Looking for Messages from or to a Person	266
Combining Names and Words	267
Finding Messages to Yourself	268
Specifying the Message Date	268
Changing the List View	269
Saving and Reusing Your Search Criteria	271

Saving a Set of Search Criteria	271
Reusing a Set of Search Criteria	272
Sharing a Saved Search	272
Deleting a Saved Search	272
Creating More Closely Defined Searches	273
Exploring the More Choices Tab	273
Using Advanced Options	275
Using More Advanced Find Criteria	280
Finding Other Types of Items	280
Finding Messages You've Sent	280
Finding Messages in Various Subfolders	280
Finding Calendar Items	281
Finding Other Types of Items	282
Finding Any Type of Outlook Item	282
Finding Files	283
Specifying Folders	283
Specifying File Names	284
Choosing File Types	285
Searching for Files	285
Specifying File Contents	286
Specifying a Date	287
Specifying More Choices	287
Using the Advanced Tab	288
Using Find from the Windows Desktop	288
From Here...	289

11 Archiving Items 291

AutoArchiving Outlook Items	292
Controlling When AutoArchiving Occurs	292
Preparing Items for AutoArchiving	293
Item Aging	296
Setting the Do Not AutoArchive Field	297
Manual Archiving	298
Managing Archives	299
Maintaining Your Archive	299
Retrieving Archived Items	300
Exporting Items	303

- Deleting Items 303
 - Deleting Items Manually 303
 - Deleting Items Automatically 305
- From Here... 306

Part II: Exploring Outlook's Broader Capabilities

12 Working with Profiles 309

- Understanding Profiles and Information Services 310
 - Understanding How Outlook Uses Profiles 310
 - Using Outlook Configurations 311
- Choosing a Profile 312
- Exploring Your Current Profile 314
- Modifying Your Current Profile 315
 - Adding a Service to a Profile 315
 - Removing a Service from a Profile 315
 - Modifying a Service's Properties 316
- Creating a New Profile 316
- Deleting a Profile 318
- Renaming a Profile 318
- Working with Multiple Profiles 319
- From Here... 319

13 Working with Folders and Address Books 321

- Understanding and Working with the Standard Folders 322
 - Working with Folders 323
- Creating Personal Folders and Subfolders 324
 - Creating Personal Folders 324
 - Creating Subfolders 326
- Maneuvering the Folder List 327
- Moving Information Between Folders 328
- Setting Folder Properties 328
 - Working with the General Tab 329
 - Working with the AutoArchive Tab 330
 - Working with the Administration Tab 332

Working with the Forms Tab	333
Viewing Files Through Outlook	334
Using Folders with Exchange	337
Public Folders	337
Offline Folder	338
Working with the Address Books	338
Creating and Using Personal Outlook Address Books	340
Using the Outlook Address Books with Automatic Name Checking	342
Creating and Using Distribution Lists	343
Setting Your Personal Address Book Properties	346
Importing Contact Information from Other Sources	347
From Here...	350
14 Planning Meetings	353
Understanding How Outlook Schedules Meetings	354
Proposing a Meeting	355
Inviting Attendees and Reserving Resources	356
How Outlook Deals with People in Different Time Zones	358
Finding a Mutually Convenient Time and Place	358
Manually Selecting a Time	358
Using AutoPick to Select a Meeting Time	360
Requesting the Meeting	360
Making Changes to the Meeting After Sending the Meeting Request	362
Responding to a Meeting Request	362
Tracking Responses to a Meeting Request	363
Canceling a Meeting	366
Working with Recurring Meetings	366
From Here...	367
15 Customizing Your Calendar	369
Formatting the Calendar View	370
Changing the Fonts for the Calendar View	371
Displaying Time as Clocks	372
Displaying Calendar Items End Times	374

Working with Weekend Days	374
Working with Calendar Fields	375
Formatting Columns	376
Changing the Order of Columns	377
Adding Columns to the View	379
Removing Columns from a View	380
Changing the Label of a Column Heading	380
Changing the Format of a Column's Contents	381
Using Filters	381
Modifying Views and Creating Custom Views	384
Working with Fields	385
Grouping the Calendar Items	387
Selecting a Sort Order	388
Creating or Modifying a Filter	389
Working with Column Formatting	389
Controlling the TaskPad	390
Installing and Using the Timex Data Link	392
From Here...	393
16 Organizing Your Tasks	395
Formatting the Task Views	396
Formatting Gridlines	397
Using AutoPreview	398
Formatting Columns	399
Working with Task Fields	403
Sorting and Filtering Tasks	405
Grouping Tasks	407
Displaying Grouped Tasks	408
Organizing Tasks by Project	410
Using Categories to Organize Tasks by Project	410
Using a New Field to Organize Tasks by Project	411
Working with Task Status	413
From Here...	414
17 Assigning Tasks	415

- Understanding Assigned Tasks and Task Ownership 416
- Understanding Task Ownership 416
- Sending a Task Request 417
- Accepting and Declining a Task Request 420
 - Accepting or Declining a Task 421
 - Reassigning a Task Request 422
 - Declining a Task After You Accept It 424
 - Reclaiming Ownership of a Declined Task 424
- Sending and Receiving Status Reports and Information About Tasks 424
 - Sending a Status Report for a Task 425
 - Sending a Copy of a Task to Others 426
 - Viewing the List of People Who Keep Updated Copies of a Task 427
 - Using the Assignment View 428
- Extending Outlook Through Microsoft Team Manager 428
- From Here... 430

18 Organizing Your Journal 431

- Formatting the Journal View 432
 - Changing the Font of a Timeline View 432
 - Changing the Item Label Length 433
 - Changing the Amount of Time Displayed in a Timeline 433
 - Controlling Whether to Display Labels When Viewing by Month on a Timeline 434
 - Controlling the Display of Week Numbers on a Timeline 436
- Working with Journal Fields 437
- Grouping Journal Entries 438
- Displaying Grouped Journal Entries 440
- Adding Automatic Journaling to an Other-than-Office Application 440
- From Here... 441

19 Providing More Information About Contacts 443

- Formatting the Contacts View 444
 - Changing the Fonts of Card Views 444
 - Making Other Format Changes 445
 - Changing How a Contact Is Filed 445
- Working with Contact Fields 446
 - Adding Fields to Card Views 450
 - Deleting Fields from Card Views 451
- Providing Detailed Information About a Contact 451
- Sorting and Filtering Contacts 453
- From Here... 457

20 Sending and Receiving Internet E-mail 459

- Understanding Internet E-mail 460
- Configuring the Internet Mail Information Service 462
 - Connecting to an Internet Mail Server with a Direct Connection 464
 - Connecting to an Internet Mail Server by Way of a Dial-Up Connection 468
- Using Internet Mail in Outlook 474
 - Sending Internet Mail 474
 - Receiving Internet Mail 476
- From Here... 477

21 Exploring the Web 479

- Taking Advantage of the Web 480
- Connecting to the Web 481
 - Working with Microsoft Internet Explorer 482
 - Setting Up Your Options 483
 - Taking Advantage of Outlook 485
- Locating a Web Site 485
 - Using a Category 486
 - Using a Search Engine 489
- Comparing Search Engines 491
 - Microsoft 492
 - AltaVista Search 492

- Excite 493
- HotBot 494
- Infoseek 495
- Lycos 496
- Magellan 497
- NetGuideLive 498
- WebCrawler 498
- Yahoo! 500
- Saving a Web Site as a Favorite 501
 - Saving Your Favorite Sites 501
 - Organizing Your Sites 505
 - Reorganizing Your Favorite Sites 507
- Downloading Information 508
 - Downloading a File 509
 - Protecting Against the Downloading Risks 510
- From Here... 511

22 Sending and Receiving E-mail from Other Services 513

- Understanding How Outlook Communicates with Other Services 514
- Adding Information Services To A Profile 515
- Using Word As Your E-mail Editor 518
- Working with the Microsoft Network 522
- Working with Lotus cc:Mail Messages 525
- Working with Exchange Server 4.0 528
- Working with CompuServe Messages 535
- From Here . . . 543

23 Sending and Receiving Faxes 545

- Understanding How Outlook Works with Faxes 546
- Setting Up Microsoft Fax Information Services 546
 - Installing Microsoft Fax 546
 - Retrieving and Installing the MS Cover Page Fix 549
 - Setting Microsoft Fax Properties 549
- Sending Faxes 556
 - Sending Faxes Using the Compose New Fax Wizard 556
 - Creating a Custom Cover Page 561

- Receiving Faxes 565
 - Viewing Received Faxes 566
 - Manipulating Received Faxes 568
 - Converting a Received Fax to Editable Text 568
- From Here... 569

24 Creating Items Automatically 571

- Reviewing Typical Scenarios 572
- Understanding AutoCreate 572
- Creating New Items in Similar Folders 573
 - Creating Messages 574
 - Creating Contacts 574
- Creating New Types of Items Using an Existing Item 575
 - Using the Move/Copy to Folder Commands 575
 - Using Drag and Drop 577
- Fields Supported by AutoCreate 578
 - Creating Messages 578
 - Creating Appointments 580
 - Creating Contacts 581
 - Creating Tasks 582
 - Creating Journal Entries 583
 - Creating Notes 583
- Dragging Items to the Windows Desktop 584
- Creating Outlook Items from the Office Shortcut Bar 584
- Using Outlook with Other Office Applications 585
 - Dragging Items from Outlook Folders to Office Applications 585
 - Creating an Office Document from Outlook 586
 - Creating a Letter from a Contact 587
 - Using Contacts with Word's Mail Merge 590
- Creating Explorer Shortcuts and Attachments 592
- From Here... 594

25 Exporting and Importing Items 595

- Using the Windows Clipboard 596
- Understanding Export and Import File Types Supported by Outlook 599

Exporting Information from Outlook	602
Exporting Information to Other Office Applications	602
Exporting Information to a Delimited File	607
Exporting Information to the Timex Data Link Watch	610
Importing Information into Outlook	616
Importing Information from Other Office Applications	617
Importing Information from Personal Folder Files	619
From Here . . .	621

26 Working Remotely 622

Understanding Outlook's Remote Capabilities	623
Setting Up Dial-Up Networking	624
Setting Up Remote Mail for Microsoft Mail	627
Creating a Personal Folder File on Your Client	627
Downloading an Address Book	629
Configuring MS Mail Client Delivery Service and Message Options	629
Setting Up Remote Mail for Microsoft Exchange Server 4.0	633
Setting Up Remote Mail for Internet Mail	639
Setting Up Remote Mail for The Microsoft Network (MSN)	641
Connecting to Information Services Using Remote Mail	642
Sending and Receiving Messages Remotely	644
From Here...	647

Part III: Developing Outlook Applications

27 Modifying and Creating Forms 651

Understanding Outlook Forms and Fields	652
The Appointment Form	653
The Contact Form	653
The Journal Form	654
The Mail Message Form	655
The Meeting Request Form	655
The Note Form	656
The Task Form	656
The Task Request Form	656

The Standard Office Documents Available in Outlook	657
Outlook Fields	657
Creating a Form	660
The <i>Label</i> Control	662
The <i>TextBox</i> Control	663
The <i>ComboBox</i> Control	664
The <i>ListBox</i> Control	665
The <i>CheckBox</i> Control	666
The <i>OptionButton</i> Control	666
The <i>ToggleButton</i> Control	667
The <i>Frame</i> Control	667
The <i>CommandButton</i> Control	668
The <i>Image</i> Control	668
Other Controls	670
Using Standard Fields	670
Using the Alignment Tools	671
Bring to Front/Send to Back Tools	671
Group/Ungroup Tools	671
Alignment Tools	672
Creating Formula Fields	674
Creating Custom Fields	676
Saving a Form	677
Using Templates to Create Items	680
Saving a Form as a Template	680
Using a Template to Create an Item	680
From Here...	680

28 Working with Visual Basic Script 683

Introducing Visual Basic Script	684
Planning VB Code	689
<i>Open</i>	691
<i>Read</i>	691
<i>Write</i>	692
<i>Close</i>	692
<i>Send</i>	693
<i>Reply, ReplyAll</i>	694

- Forward* 695
- PropertyChange* 695
- CostumProperityChange* 696
- Click* 696
- Writing VB Code 697
 - Referencing Outlook Items and Properties 701
 - Referencing Outlook Controls 703
 - Writing Code for the Outlook Events 704
- Practical Coding Techniques 714
 - Referencing Outlook Folders 715
 - Referencing Outlook Items and Properties 716
 - Referencing Controls on Outlook Forms 716
 - Referencing an Office Document in an Outlook Folder 717
 - Referencing Another Outlook Item 717
 - Iterating Through Outlook Items 717
- Debugging and Editing VB Code 718
- Running VB Code 720
- Enhancing Outlook Forms with ActiveX Controls 723
- From Here... 726

29 Using the Outlook Object Model 727

- An Introduction to Objects 728
- An In-Depth Look at the Outlook Object Model 728
 - Application* Object 729
 - Getting More Help on the Outlook Object Model 739
- An Overview of the Major Office Object Models 740
 - The Access Object Model 740
 - Getting More Help on the Access Object Model 745
 - The DAO/Jet Object Model 745
 - Getting More Help on the DAO/Jet Object Model 747
 - The DAO/ODBCDirect Object Model 748
 - Getting More Help on the DAO/ODBCDirect Object Model 749
 - The Excel Object Model 750
 - Getting More Help on the Excel Object Model 757
 - The Word Object Model 757
 - Getting More Help on the Word Object Model 768

Using the Object Browser to Examine the Outlook Object
Model 768
From Here... 769

Appendixes

A Installing Outlook 773

Checking Your Outlook Installation 774
 What to Do if the Microsoft Office Check Box Is Empty 775
 What to Do if the Check Box Contains a Check Mark on a
 White Background 776
 What to Do if the Check Box Contains a Check Mark on a
 Gray Background 776

B Setting Outlook's Options 777

AutoArchive Options 778
 Enabling and Disabling AutoArchive 778
 Prompting Before AutoArchive 778
 Deleting Expired Items 779
 Choosing an Archive File 779
Calendar Options 779
 Setting the Work Week 779
 Setting Calendar Working Hours 780
 Setting Appointment Reminders 780
 Changing the Date Navigator Appearance 780
 Using Schedule+ as Your Primary Calendar 780
 Setting Time Zones 780
 Adding Holidays 781
 Advanced Scheduling 782
E-mail Options 782
 Checking for New Mail 783
 Indicating Mail Arrival 783
 Processing Mail Automatically 783
 Selecting an E-mail Editor 784
General Options 784
 General Settings 784
 Startup Settings 785

- Installing Add-Ins 786
- Dialing Options 787
- Journal Options 787
 - Selecting Activities to be Journalled 788
 - Selecting File Activities to be Journalled 788
 - Displaying Journal Entries 788
 - AutoArchiving Journal Entries 789
- Manage Forms Options 789
- Reading Options 790
 - Replying to Messages 790
 - Forwarding Messages 791
 - Moving or Deleting Open Items 791
 - Identifying Comments 791
 - Closing Messages 792
- Reminders Options 792
- Sending Options 793
 - Choosing a Font 793
 - Setting Importance and Sensitivity 793
 - Allowing Commas as Address Separators 793
 - Using Automatic Name Checking 793
 - Setting Tracking Options 794
 - Saving Messages You Send 794
- Spelling Options 794
- Tasks/Notes Options 795
 - Setting Task Defaults 795
 - Choosing Colors for Tasks 796
 - Changing Working Hours 796
 - Changing Note Defaults 796
- Saving Options 796
- C Outlook's Standard Folders, Files, and Fields 797**
 - Standard Folders and Subfolders 798
 - Standard Files 798
 - Standard Fields 799

D Reference Sources 805

Online Help 806

Published Books 806

Getting Results with Microsoft Office 97 806

Special Edition Using Microsoft Office 97 806

Microsoft Windows 95 Resource Kit 806

World Wide Web Resources 806

Getting Results with Microsoft Office 97 806

General Outlook Information 807

Microsoft Support 807

Glossary 809

Index 825

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

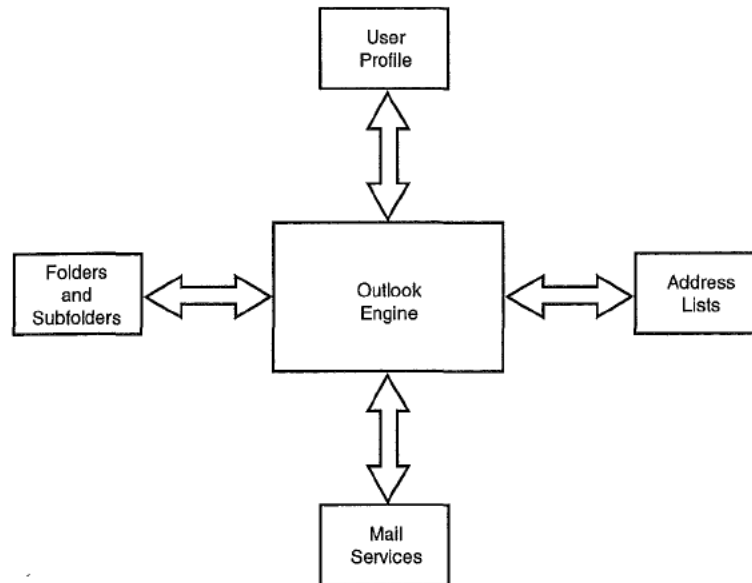
In short, Outlook provides the facilities you need to get organized and work efficiently.

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

NOTE 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.

NOTE 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

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.

NOTE 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.

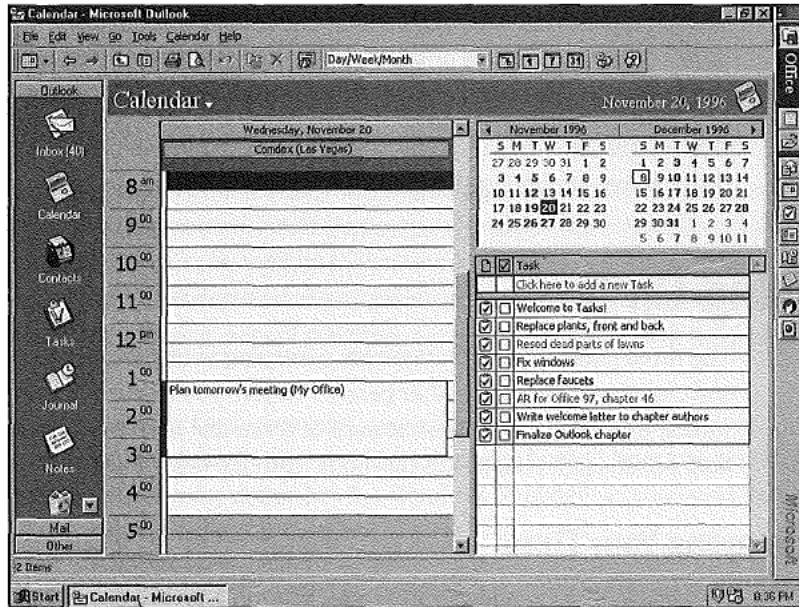
In addition to the day view shown here, you can also choose a week or month view. With any view displayed, you can easily move to other days, weeks, months, and years.

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.

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.

Preparing to Work with Microsoft Mail E-mail

by 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.

NOTE Microsoft refers to Word as WordMail when you use it as your e-mail editor.

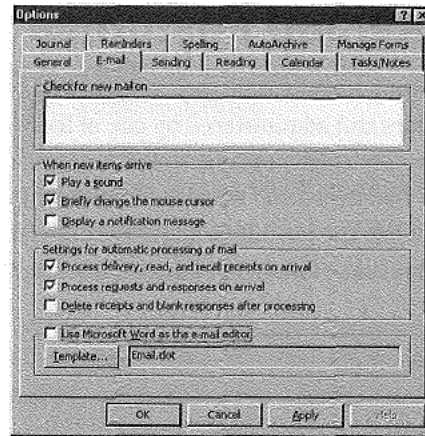
Outlook allows you to choose only between RichEdit and WordMail. You cannot use any other editor or word processor to work with e-mail messages within Outlook. ■

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

1. Choose **T**ools, **O**ptions to open the Options dialog box. Select the E-mail tab shown in Figure 8.1.
2. Click the Use Microsoft **W**ord 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.

NOTE If you don't know whether a postoffice already exists, or have trouble locating it, consult your workgroup administrator. ■

Creating the Postoffice

NOTE 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.

NOTE Each workgroup can have only one postoffice. You must not create a second postoffice if one already exists. ■

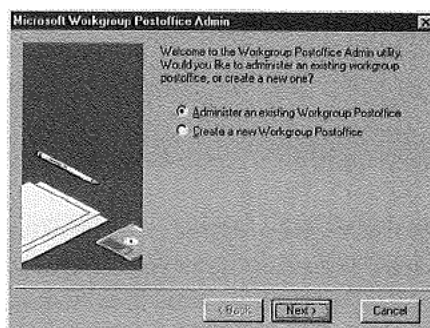
A postoffice consists of a set of folders on a disk that is accessible from all workgroup computers. Decide which computer, and which disk on that computer, should contain the postoffice folders, and then create a folder that will contain all the subsidiary postoffice folders. You can call this folder 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.

NOTE 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). ■

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

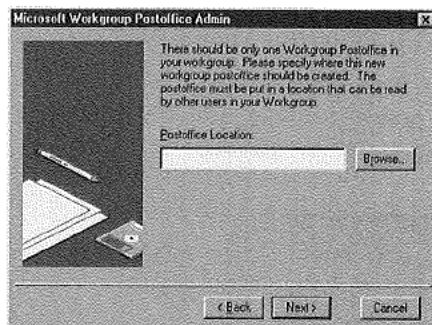
1. If Outlook is already running, choose **F**ile, **E**xit and **L**og Off to close Outlook and return to the Windows desktop.
2. Choose **S**tart in the Windows taskbar, choose **S**ettings from the Start menu, and choose **C**ontrol Panel to open the Windows Control Panel.
3. In the Control Panel, 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 **C**reate a New Workgroup Postoffice, and click **N**ext 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.



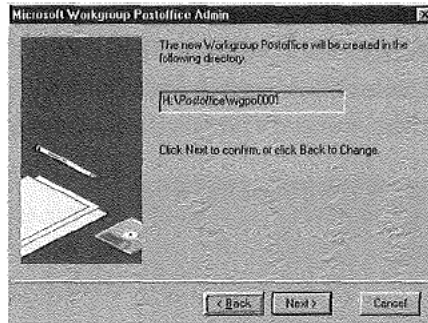
NOTE If this dialog opens showing the address of a postoffice location, you already have a workgroup postoffice. To avoid creating a second postoffice, click **C**ancel.

5. Click **B**rowse 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.

- 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.

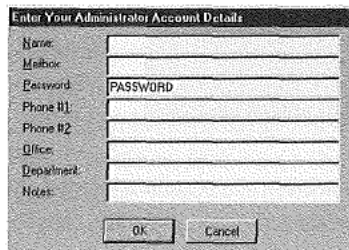


NOTE If you don't like the name automatically assigned to your postoffice folder, accept it for now. After you've completely finished creating the postoffice, you can change the folder name in the same way that you change any other folder name. Open Windows Explorer, select the postoffice folder name, choose **File, Rename**, edit the folder name, and press Enter.

- Click Next to open the Enter Your Administrator Account Details dialog box, shown in Figure 8.5.
- Enter a postoffice administrator **N**ame (such as Administrator) for yourself, an administrator **M**ailbox name (such as admin), and replace the provisional **P**assword (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 information about yourself as the postoffice administrator.



NOTE 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. ■

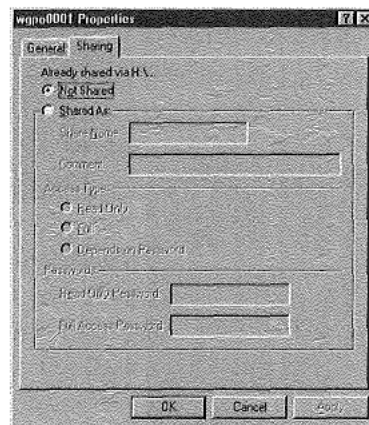
CAUTION

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 **S**haring 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 **S**haring in the shortcut menu to display the Properties dialog box with the Sharing tab selected, as shown in Figure 8.6.

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.

NOTE 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.

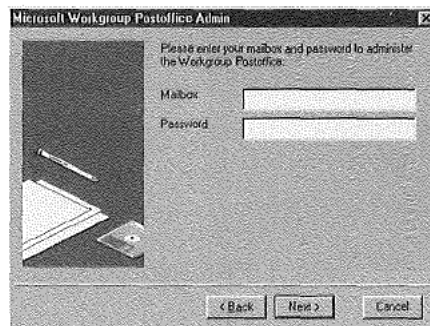
Creating Postoffice Mailboxes

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.

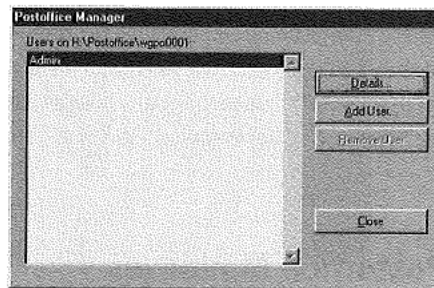
FIG. 8.7
You must supply the administrator's mailbox name and password to proceed.



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

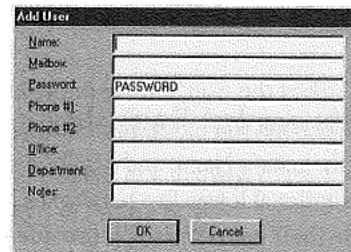
The Postoffice Manager dialog box shows the names of people who currently have mailboxes. Immediately after you create a postoffice, only the postoffice administrator has a mailbox.



6. Click Add User to display the Add User dialog box shown in Figure 8.9.

FIG. 8.9

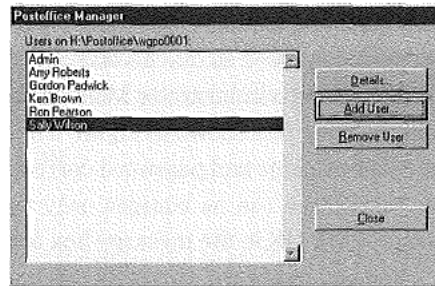
Provide information about yourself as a user in the Add User dialog box.



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.

FIG. 8.10
After you finished adding users' mailboxes, the Postoffice Manager dialog box should look something like this.



NOTE 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 **R**emove User. A message box appears asking you to confirm that you want to delete the user. Click **Y**es to complete the deletion, otherwise click **N**o.

To change information about a user, select the user's name in the Users list, and click **D**etails to display the details of the user, with the exception of the password, which is shown as asterisks. You can change the user's **N**ame and **M**ailbox 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

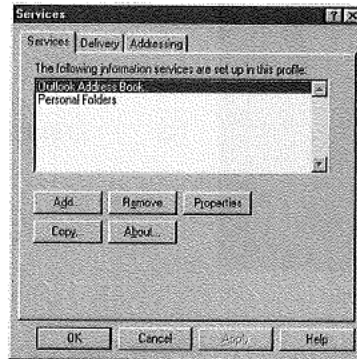
At this time, you have your computer physically connected to other computers in your workgroup, a workgroup postoffice exists, and you have created mailboxes in the postoffice. Now, you and every other workgroup member must provide Outlook with the information it needs to receive e-mail from, and send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

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 **T**ools, **S**ervices to open the Services dialog box. The Services tab shows a list of information 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.



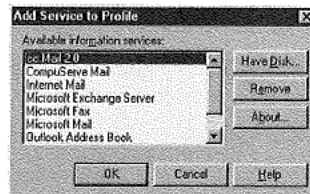
If the list does not include Microsoft Mail, you need to add it. If Microsoft Mail already exists in the list, you may need to configure some of its properties. If Microsoft Mail does not already exist, follow the steps in the following section. If Microsoft Mail does exist, skip the following section and go to the section “Configuring the Microsoft Mail Information Service.”

Adding the Microsoft Mail Information Service

With the Service dialog box displayed, click **A**dd 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.

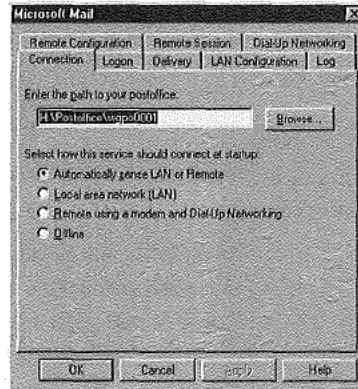


NOTE The list of available information services you see on your monitor may be different from the list shown in the figure, but will include Microsoft Mail. ■

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.

NOTE 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

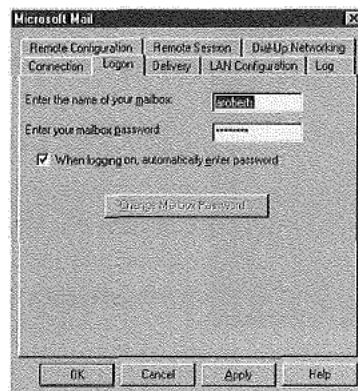
Configuring the Microsoft Mail Connection The Connection tab displays the path to your postoffice, as shown previously in Figure 8.13.

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 **B**rowse 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, **A**utomatically **S**ense 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.



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.

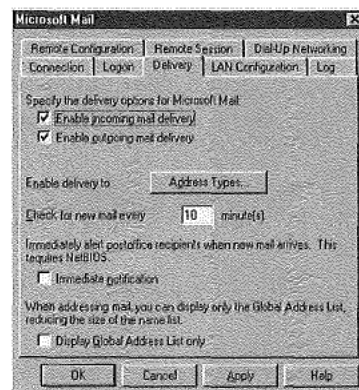
By default, the When Logging On, Automatically Enter Password check box doesn't have a check mark. If you leave it like this, you will have to supply your password each time you log onto the postoffice. On the other hand, if you place a check mark in this check box, Outlook remembers your password so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

NOTE 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.

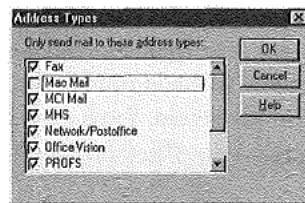


The default check mark in the Enable Incoming Mail Delivery check box is necessary if Outlook is to receive mail from the postoffice. If this check mark is absent, you won't be able to receive mail.

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.

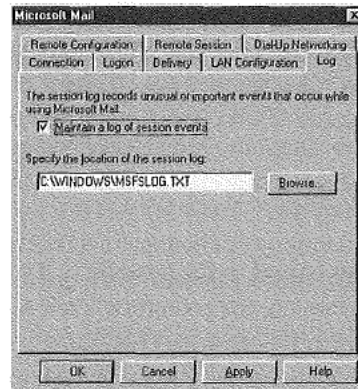
Configuring the Microsoft Mail Log You can choose whether or not you want to maintain a log (history) of your mail activities. It's probably a good idea to do so, so that you can check what messages you've received and sent.

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.

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 **F**ile, **E**xit and **L**og 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.

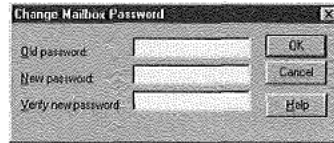
Changing Your User Password

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 **T**ools, **M**icrosoft **M**ail **T**ools, **C**hange 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.

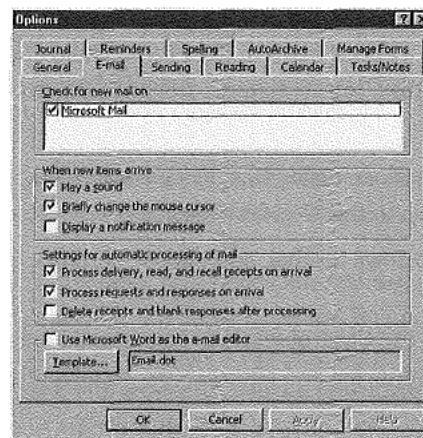


2. In the Old Password text box, type the temporary password the postoffice administrator provided.
3. In the New Password text box, type the password you want to use. The characters you type are shown on-screen as asterisks so that anyone who's watching over your shoulder can't see what you typed.
4.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



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.

NOTE 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:

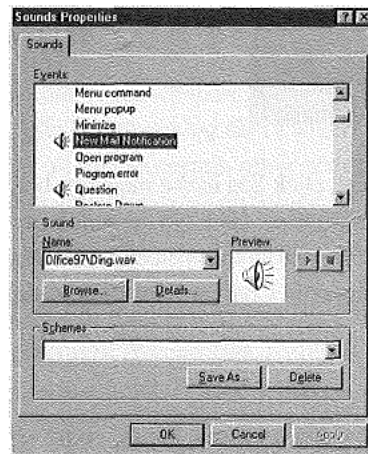
- Play a Sound
- Briefly Change the Mouse Cursor
- Display a Notification Message

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.

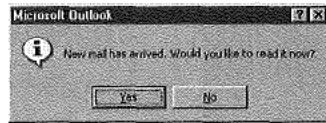
From now on, you will hear the chosen sound whenever a new message arrives. Open Outlook again to continue.

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.

NOTE 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.

FIG. 8.21
Outlook displays this notification when a new message arrives.



If you want to read the new message, click Yes in the message box to see the new message in the Message dialog box. Otherwise, click No, 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 Word 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.

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.

```

Msflog.txt - Notepad
File Edit Search Help
1/17/97 - 9:39PM - Postoffice server: "H:\Postoffice\vgpo0000\".
1/18/97 - 8:20AM - Connection type selected: "Automatically sense LAN or Remote"
1/18/97 - 8:20AM - You are using the connection type "Local Area Network", connected at a speed o
1/18/97 - 8:20AM - Logged on to mailbox: "gpadvick".
1/18/97 - 8:20AM - Postoffice server: "H:\Postoffice\vgpo0000\".
1/18/97 - 8:21AM - Checking for mail: 0 item(s) to download.
1/18/97 - 9:05AM - Connection type selected: "Automatically sense LAN or Remote"
1/18/97 - 9:05AM - You are using the connection type "Local Area Network", connected at a speed o
1/18/97 - 9:05AM - Logged on to mailbox: "gpadvick".
1/18/97 - 9:05AM - Postoffice server: "H:\Postoffice\vgpo0000\".
1/18/97 - 9:06AM - Checking for mail: 0 item(s) to download.
1/18/97 - 10:08AM - Connection type selected: "Automatically sense LAN or Remote"
1/18/97 - 10:08AM - You are using the connection type "Local Area Network", connected at a speed
1/18/97 - 10:08AM - Logged on to mailbox: "gpadvick".
1/18/97 - 10:08AM - Postoffice server: "H:\Postoffice\vgpo0000\".
1/18/97 - 10:09AM - Checking for mail: 0 item(s) to download.
1/18/97 - 1:36PM - Connection type selected: "Automatically sense LAN or Remote"
1/18/97 - 1:36PM - You are using the connection type "Local Area Network", connected at a speed o
1/18/97 - 1:36PM - Logged on to mailbox: "aroberts".
1/18/97 - 1:36PM - Postoffice server: "H:\Postoffice\vgpo0001\".
1/18/97 - 1:39PM - Connection type selected: "Automatically sense LAN or Remote"
1/18/97 - 1:39PM - You are using the connection type "Local Area Network", connected at a speed o
1/18/97 - 1:39PM - Logged on to mailbox: "aroberts".
1/18/97 - 1:39PM - Postoffice server: "H:\Postoffice\vgpo0001\".
1/18/97 - 1:40PM - Checking for mail: 0 item(s) to download.
1/18/97 - 1:55PM - Connection type selected: "Automatically sense LAN or Remote"
1/18/97 - 1:55PM - You are using the connection type "Local Area Network", connected at a speed o
1/18/97 - 1:55PM - Logged on to mailbox: "aroberts".
1/18/97 - 1:55PM - Postoffice server: "H:\Postoffice\vgpo0001\".
Taskbar: Start | Microsoft Outlook | Msflog.txt - Notepad | 2:13 PM
  
```

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.

NOTE 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 **F**ile, **F**older, **C**reate Subfolder (or press Ctrl+Shift+E) to display the Create New Folder dialog box shown in Figure 8.23.
3. In the **N**ame text box, type a name (such as Messages) for the new subfolder.
4. Open the **F**older Contains list and choose from the list of item types. In this case, choose Mail Items.
5. Check the Make This Folder a **S**ubfolder Of list to make sure Personal Folders is selected.
6. If you like, enter a description of the new subfolder in the **D**escription 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.

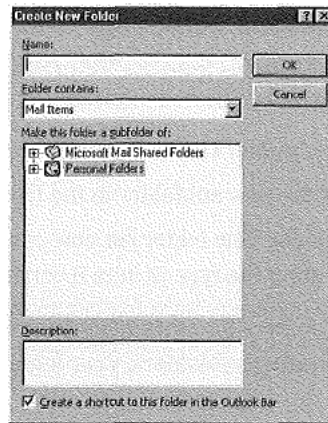
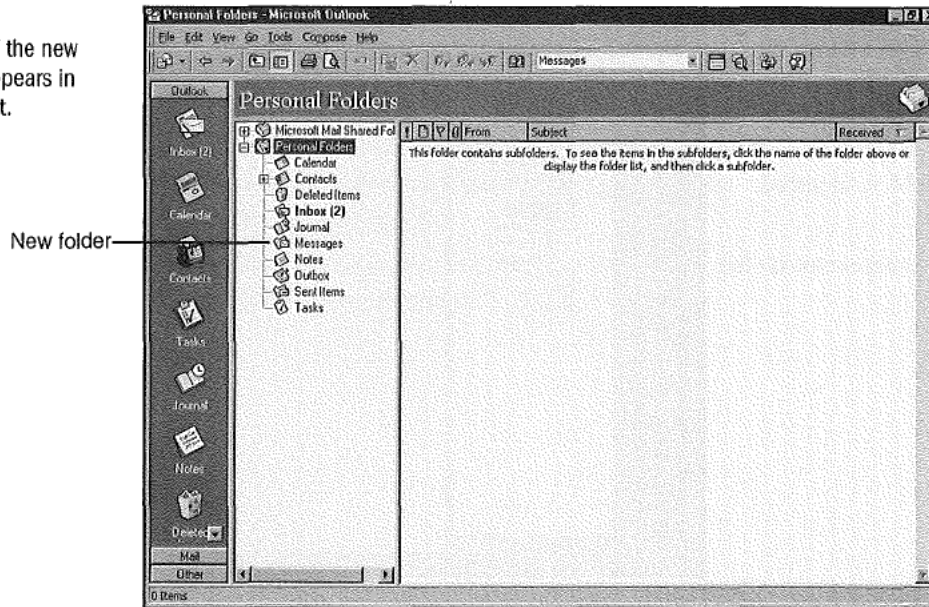


FIG. 8.24
The name of the new subfolder appears in the folder list.



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

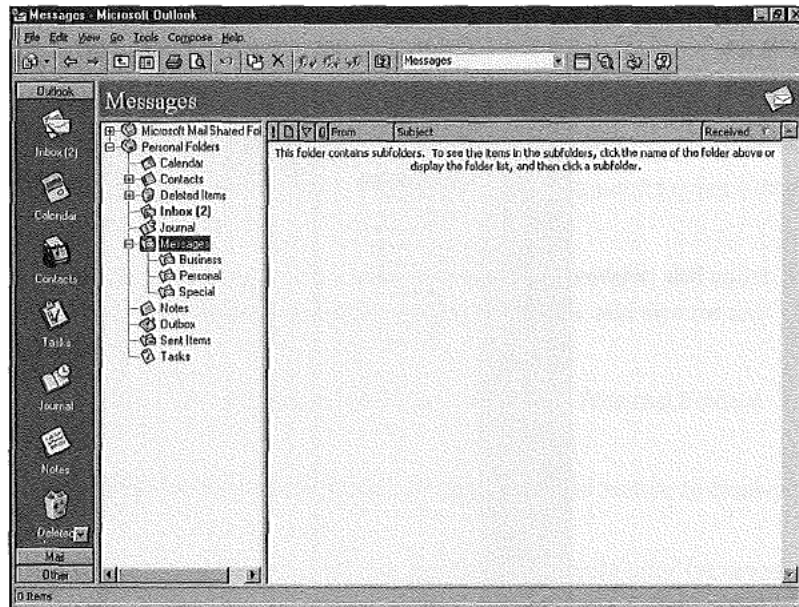
1. With any Information Viewer displayed, click Folder List in the toolbar to display the folder list.
2. Select the Messages subfolder you just created, and then choose **F**ile, **F**older, **C**reate Subfolder (or press Ctrl+Shift+E) to display the Create New Folder dialog box shown previously in 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)

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."

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.

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.

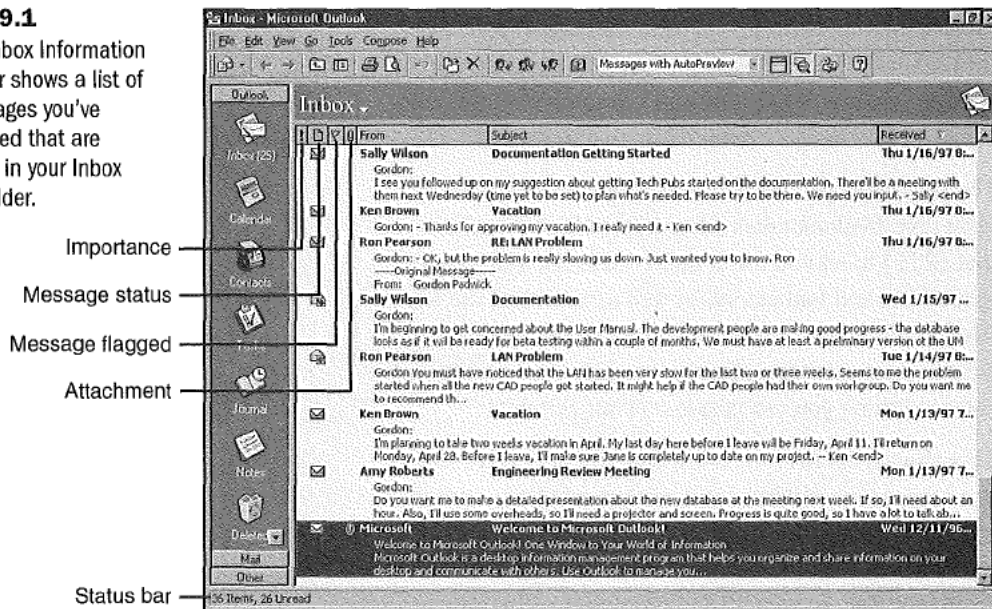
▶ See "Choosing an E-mail Editor," p. 204

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.



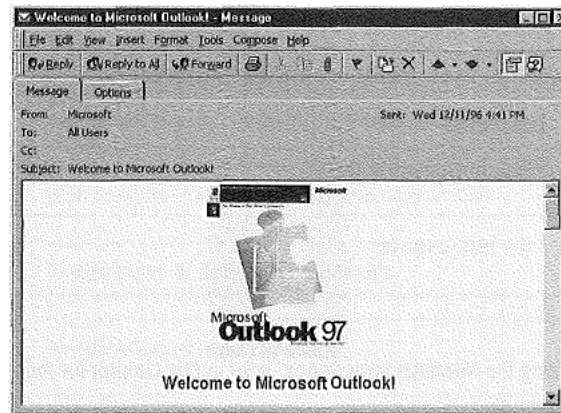
NOTE The preceding figure shows the Messages view of the messages in your Inbox. If you see a different view on your screen, open the Current View list in the toolbar, and choose Messages.

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.



NOTE 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

NOTE 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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1
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9



continues

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

NOTE 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.

NOTE See “Inserting a File or Item into a Message” and “Inserting an OLE Object” later in this chapter for more information about attachments. ■

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 **T**ools, **S**ervices 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 **P**roperties 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 **C**heck 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 **T**ools, **C**heck 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 **T**ools, **O**ptions to display the Options dialog box. If necessary, select the E-mail tab. Verify that the **C**heck 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


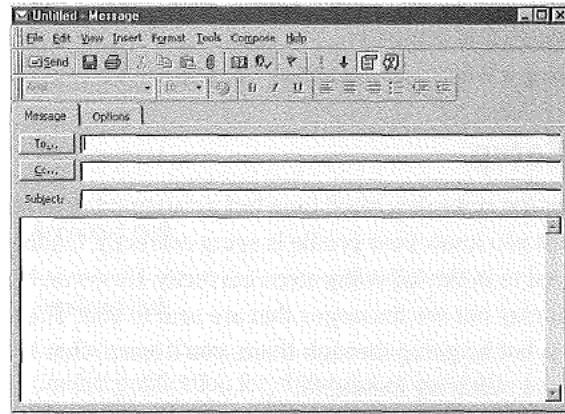

 With the Inbox Information Viewer displayed, click the New Mail Message button in the toolbar (alternatively, choose **C**ompose, **N**ew Mail Message, or press **Ctrl+N**) to display the Message dialog box shown in Figure 9.3.

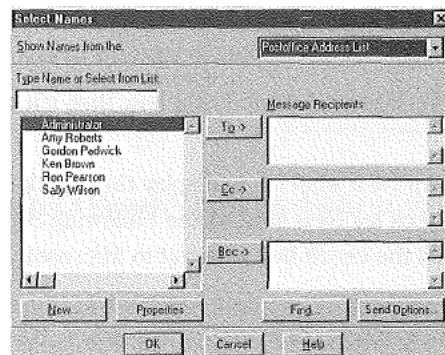
FIG. 9.3
Use the Message dialog box to create a new message.



 **NOTE** 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.



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.

NOTE 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.

NOTE 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. ■

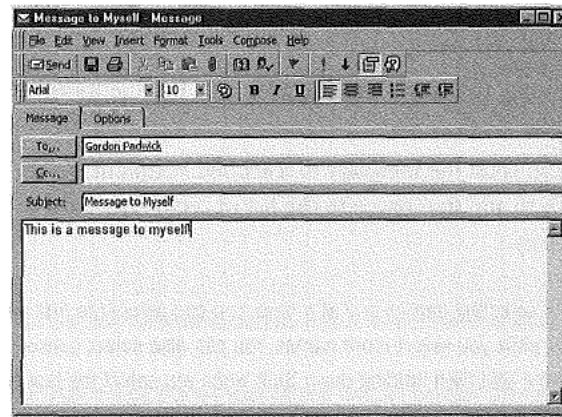
After you've specified all the recipients' names, click OK to return to the Message dialog box which now shows the names of all recipients.

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.

NOTE 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 Message 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 yourself. 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.

NOTE 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.

NOTE 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, of course, if you send the message to someone else. ■

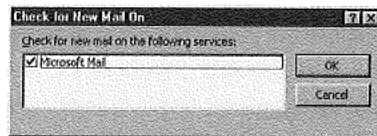
Receiving the Message

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 **T**ools, **C**heck for New Mail **O**n 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 **T**ools, **C**heck 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.

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.

NOTE 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) arrives 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.

► See "Being Alerted to Mail Arrival," p. 202

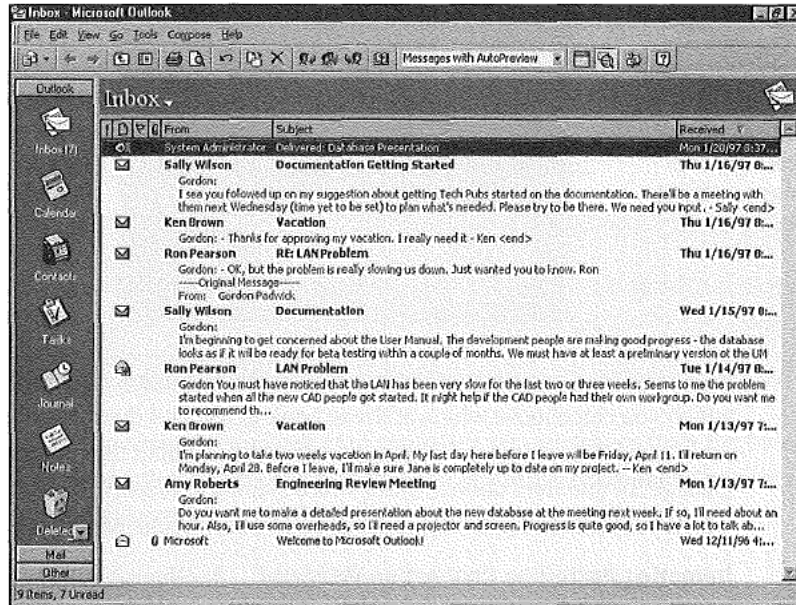
Being Notified When Mail Arrives

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

NOTE 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.

FIG. 9.8
A message from the System Administrator notifies you when a message you send is received by the postoffice.



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.

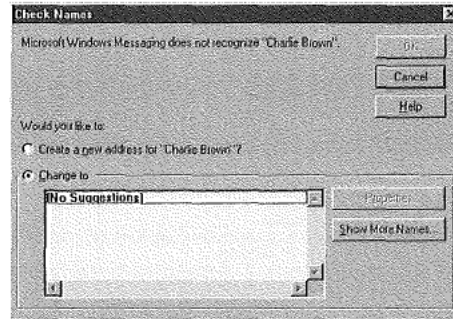
Checking Names Automatically In the previous section, "Creating a Message," you chose the name of the message recipient from a list of people who have mailboxes in the postoffice. You can, though, type a name instead of choosing it. When you type a name, there is always the possibility that you will 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 **T**ools, **O**ptions 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 **A**utomatic 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.

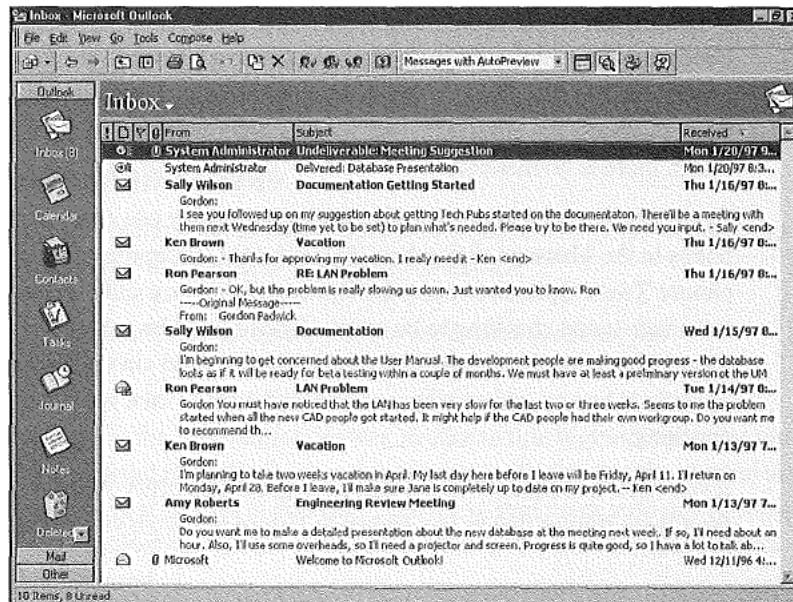


If you choose **C**reate a **N**ew Address, click **O**K to display the New Entry dialog box in which you can choose which address book to use and then provide information about the new name—see Chapter 13 for more information about this. Alternatively, you can choose **C**hange **T**o and then choose **S**how **M**ore **N**ames 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 Administrator in your Inbox if a message you send cannot be delivered to the postoffice.



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.

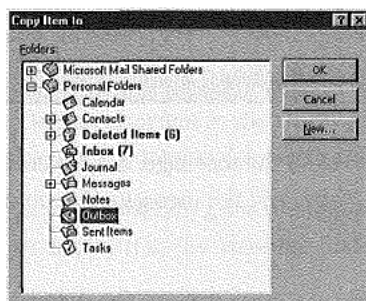
Sending a Message Later

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 **S**end 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 **F**ile, **C**opy 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.



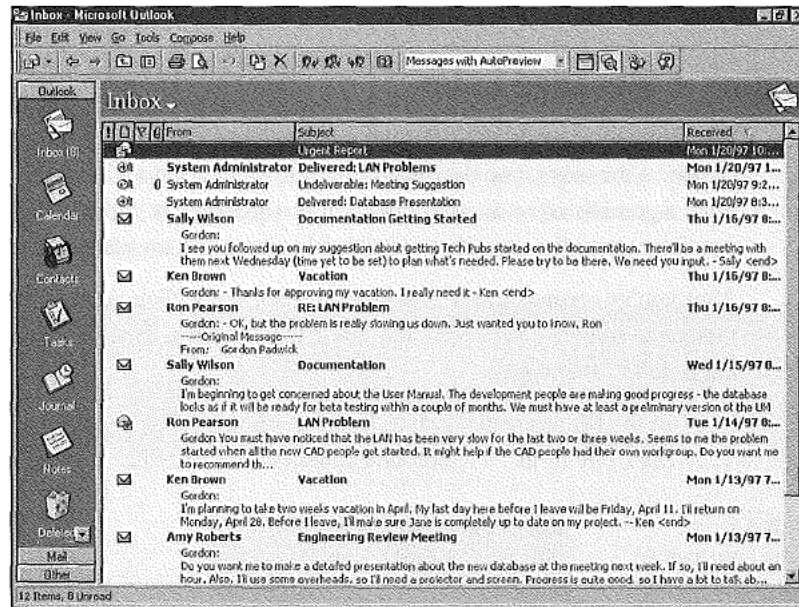
2. Select Outbox and click OK to copy the new message into the Outbox subfolder.
3. Close the Message dialog box. If a message box asks you if you want to save changes, click Yes.

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.



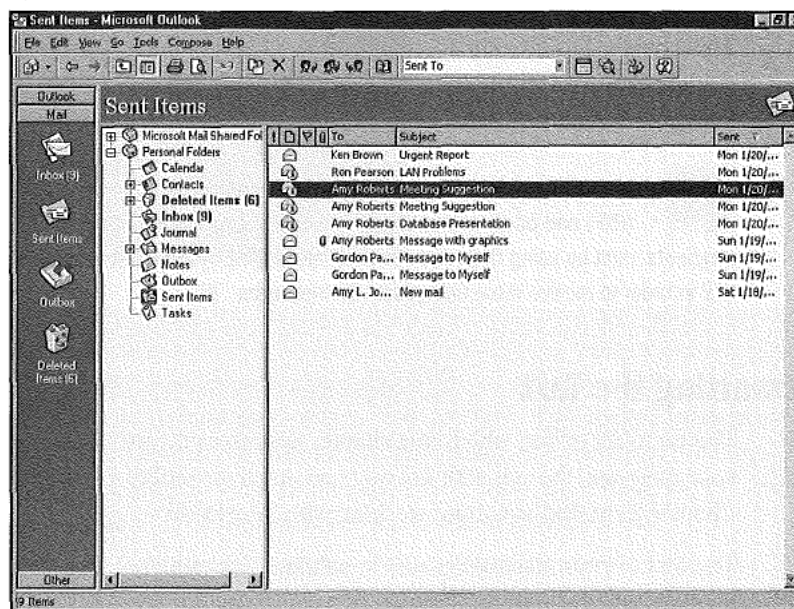
Subsequently, when you're ready to send the message, double-click it in the Information Viewer to open the Message dialog box, edit the message if necessary, and click Send to send it.

NOTE 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. ■

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.

NOTE 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.

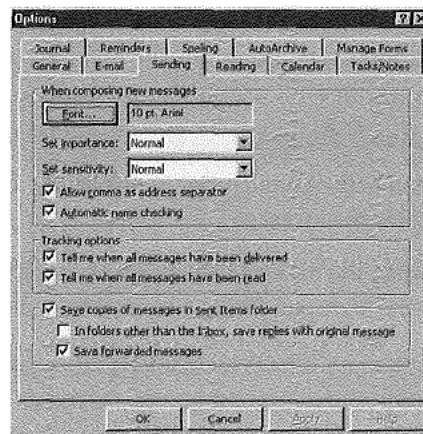
NOTE Most of the capabilities described here depend on Outlook using Rich Text Formatting (RTF) and on its compatibility with Object Linking and Embedding (OLE). Message recipients must be using Outlook or another messaging system that is compatible with RTL and OLE in order to receive more than plain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

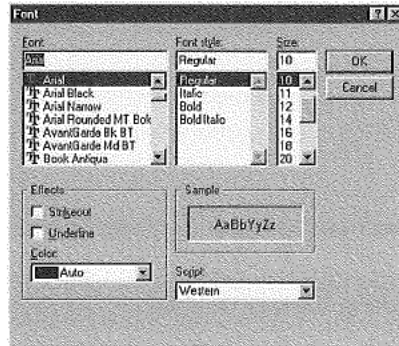
The text of your message is sent in a default font and font size. This default is set in the Sending tab of the Options dialog box, as shown in Figure 9.14. Choose Tools, Options, and select the Sending tab to display this dialog box.

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



You can change the default font by choosing **F**ont in the dialog box to display the Font dialog box shown in Figure 9.15. Use this dialog box to choose any **F**ont available on your computer, a **F**ont **S**tyle, and a **S**ize. You can also choose **S**trikeout or **U**nderline effects and a **C**olor. Click **O**K 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.

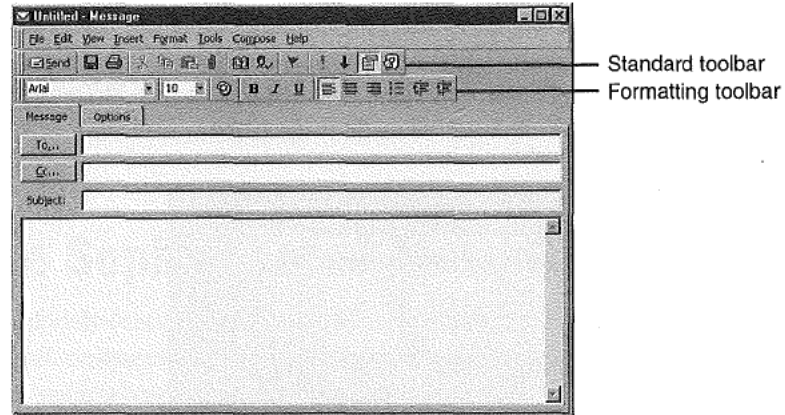
This chapter considers only using Microsoft Mail to send messages within a workgroup. However, Outlook uses the default font you choose for messages you may send by way of other information services, such as the Internet. This is another reason why it's important to stick with basic fonts.

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.

FIG. 9.16

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

**Table 9.4 RichEdit Formatting Toolbar Buttons**

Button Name	Icon	Purpose
Font		Select a font from those installed on your computer
Font Size		Select a font size
Font Color		Select a font color
Bold		Set or cancel bold font style
Italic		Set or cancel italic font style
Underline		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

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

NOTE 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.

NOTE 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.


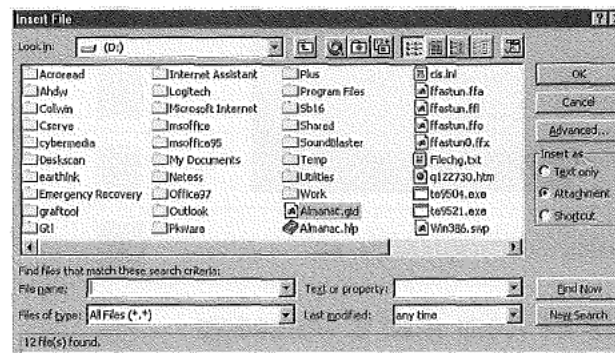
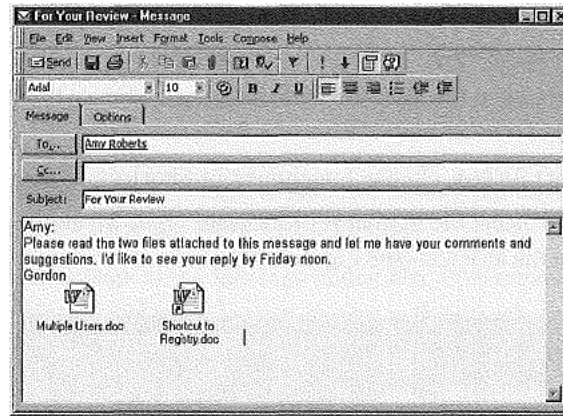
 **Inserting Files** To insert a file into a message, click the **Insert File** button in the Message dialog box toolbar (or choose **Insert, File**) to display the **Insert File** dialog box that is shown in Figure 9.18.

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.

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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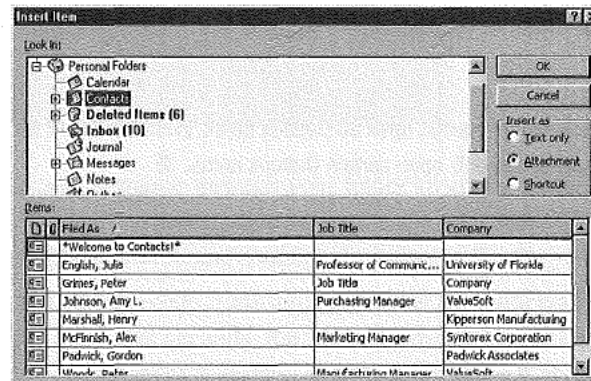
When a recipient receives a message that contains inserted files, and then double-clicks the message to open it in the Message dialog box, the recipient will see icons, the same as those in Figure 9.19. The recipient can double-click the icons to read the inserted files, providing an application that 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.

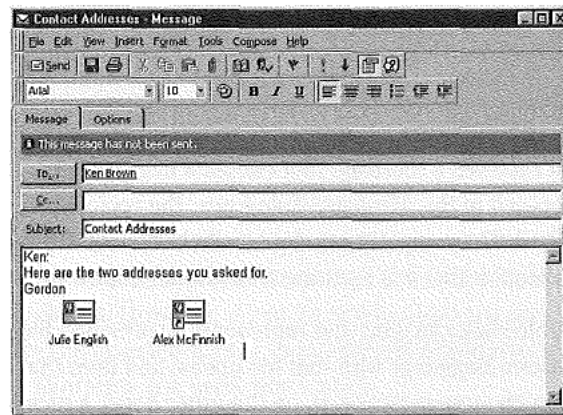
FIG. 9.20
Use the Insert Item dialog box to choose the type of item you want to send.



2. In the **L**ook 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 **I**tems list at the bottom of the dialog box, choose the item (or items) you want to send.
4. In the **I**nsert As box, choose **A**ttachment or **S**hortcut, 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.



NOTE 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.

NOTE Outlook can, of course, open all Outlook items. Exchange Client and Windows Messaging can only open certain Outlook items. ■

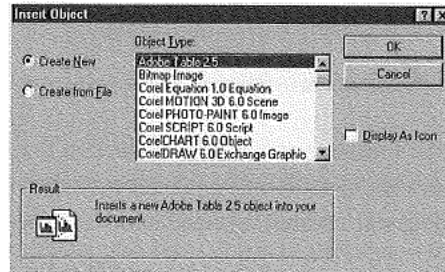
Inserting an OLE Object

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:

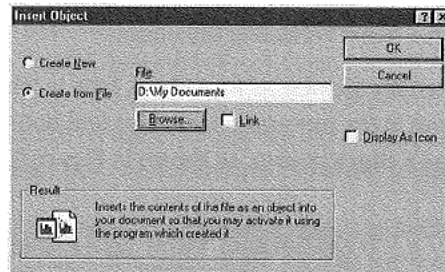
1. Display the message in the Message dialog box, then choose **I**nsert, **O**bject to display the Insert Object dialog box similar to the one shown in Figure 9.22. The object types you see on your computer depend on the applications you have installed.

FIG. 9.22
The Insert Object dialog box lets you choose between creating a new object to insert, or inserting an existing object.



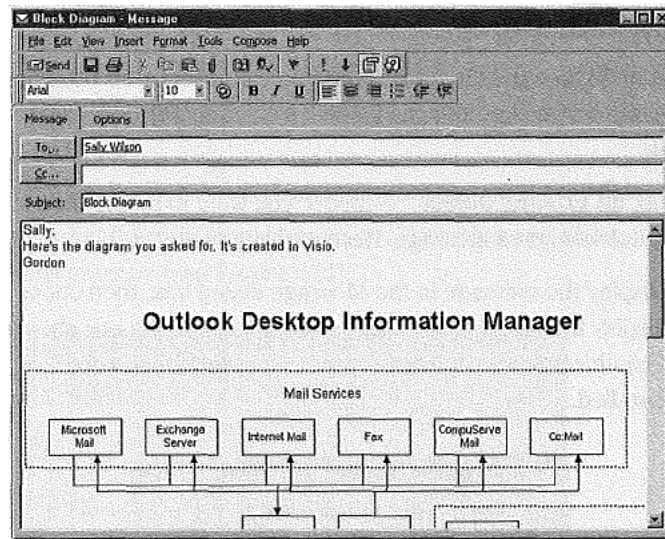
2. Choose **C**reate From **F**ile to change the Insert Object dialog box to that shown in Figure 9.23.

FIG. 9.23
In this dialog box, select the existing object you want to insert.



3. Choose **B**rowse, navigate through your folder structure to find the file that contains the object you want to insert, then select the file and click **O**K to return to the Insert Object dialog box, which now contains the name of the file you selected.
4. Leave the two check boxes, **L**ink and **D**isplay as Icon, unchecked and click **O**K. 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 **S**end to send the message.

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.

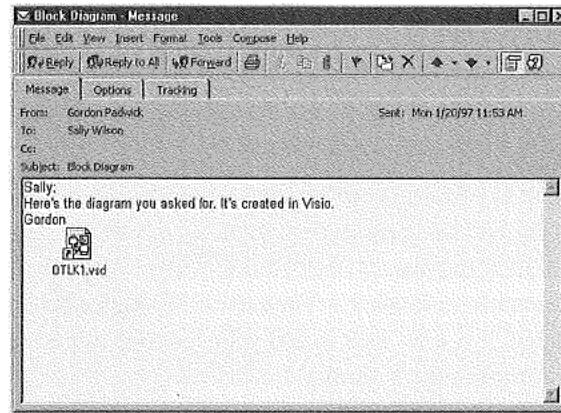
Also, you could have checked the Display as Icon check box, in which case the object would be displayed as an icon in the message. If you checked both check boxes, the object would be displayed as a shortcut icon, as shown in Figure 9.25.

NOTE 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 **I**nsert, **O**bject to display the Insert Object dialog box (refer to Figure 9.22).
2. Choose **C**reate **N**ew, choose the application (such as Visio) in which you want to create the new object from the Object **T**ype list, and click **O**K 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 **T**ools, **A**utoSignature to open the AutoSignature dialog box shown in Figure 9.26.

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 **F**ont button to open the Font dialog box. You can also select one or more paragraphs and then click the **P**aragraph 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 **A**dd 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 **D**on'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 **I**nsert, **A**utoSignature. 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

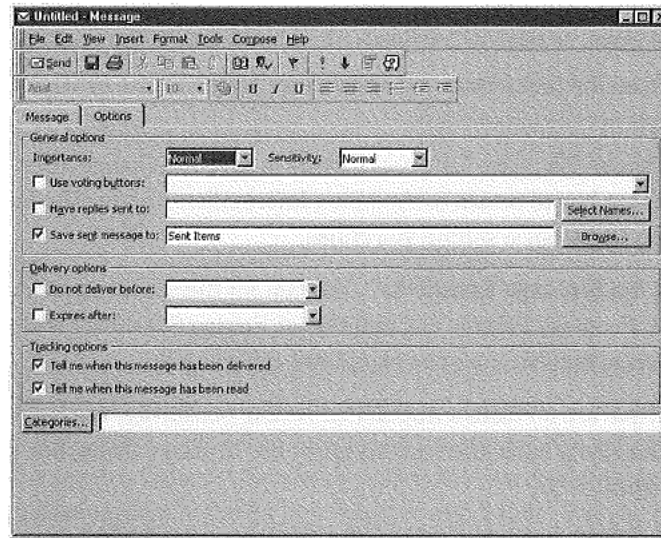
give your message high or low importance status. The only indication you see is that the last of these buttons you clicked remains pressed.

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.`

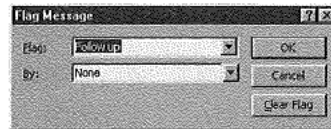
Flagging a Message

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.

NOTE 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. 

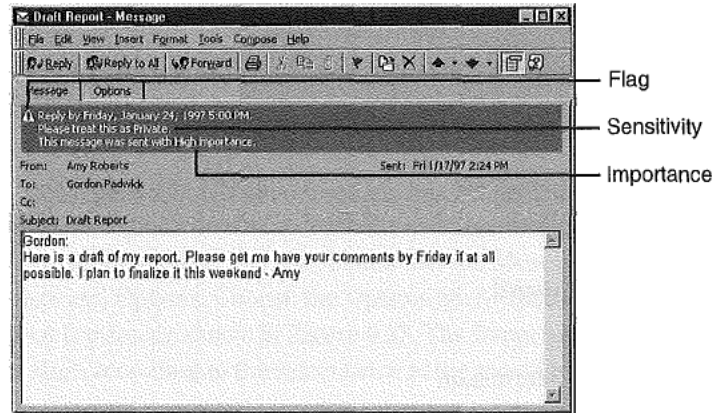
Instead of choosing from a calendar, you can type a date and time in the By box. As explained in "Typing Dates and Times" in Chapter 3, you can use words and phrases to set the date and time.

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

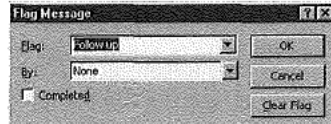
The notice at the top of this message provides details of the flag, the sensitivity level, and the importance level.



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.

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).

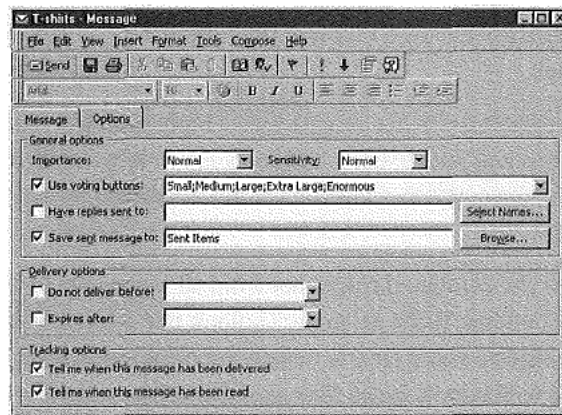
In the Options tab, click the Use Voting Buttons check box to place a check mark in it. Then open the list at the right of that check box to show a list of three available sets of voting buttons, and choose one of the sets, such as Yes; No.

NOTE 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.

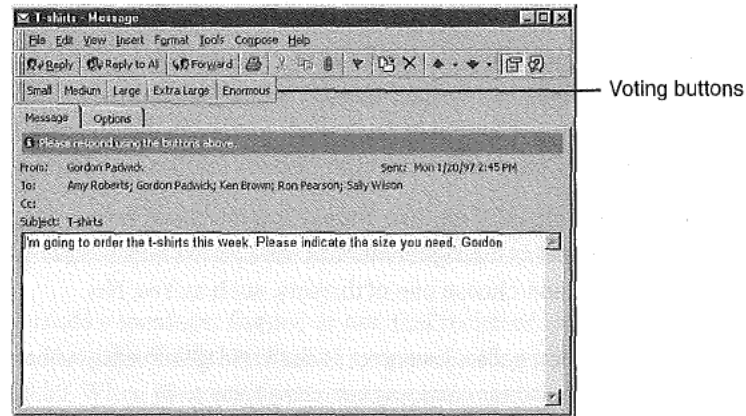
If you need a set of voting buttons that Outlook doesn't provide, you can create your own. To do so, open the Options tab of the Message dialog box and check the Use Voting Buttons check box. Now, instead of choosing from a list of button names, you can delete the names in the text box at the right of 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; Enormous, as shown in Figure 9.31.

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



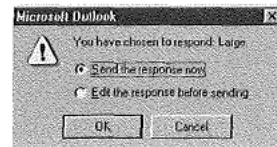
Replying to a Message with Voting Buttons When you receive a message that includes voting buttons and you double-click the message to see it in the Message dialog box, the voting buttons appear just under the toolbar, as shown in Figure 9.32.

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



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.

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

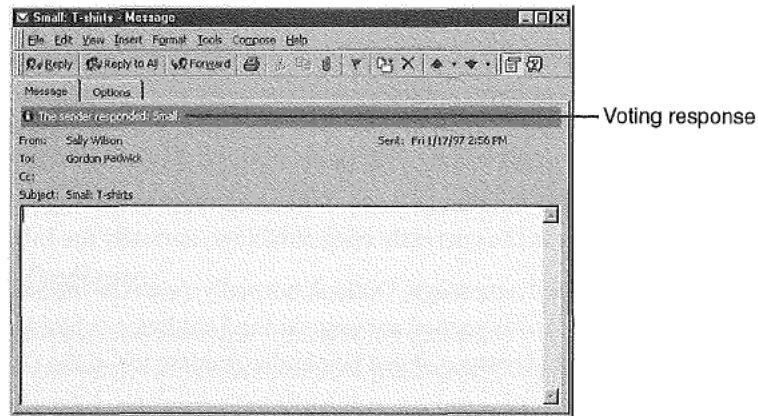
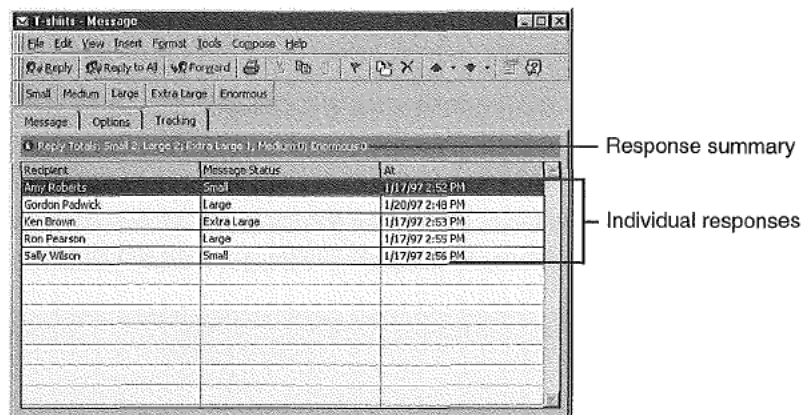


FIG. 9.35
The Tracking tab of the Message dialog box contains a list of all the replies received from people who responded to your voting buttons.



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 **E**dit, **C**opy (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:


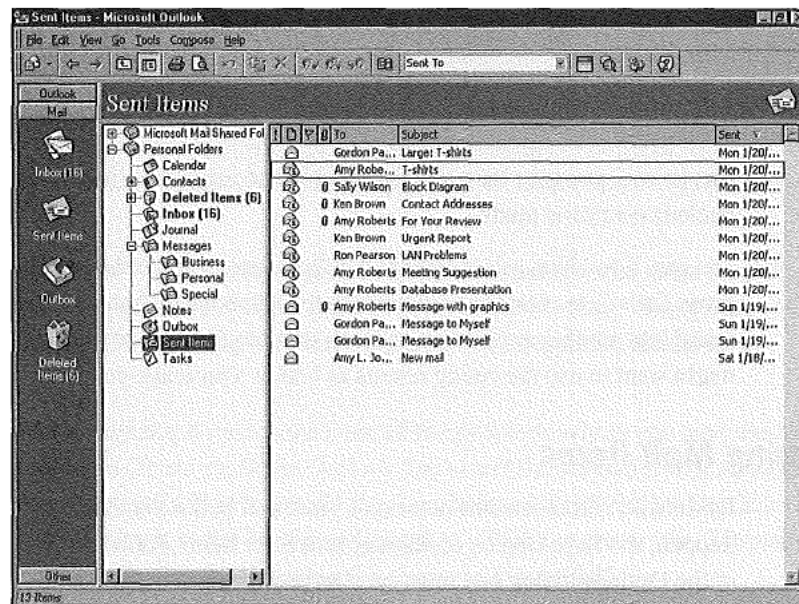
1. Click the Sent Items shortcut in the Mail section of the Outlook Bar to display the Sent Items Information Viewer.
-  2. Click the Folder List button in the toolbar to display the folder list. If necessary, expand the folder list to show the names of the subfolders into which you want to move sent 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.

NOTE 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 **T**ools, **O**ptions to open the Options dialog box, and choose the Sending tab (refer to Figure 9.14). This tab contains two tracking options check boxes:

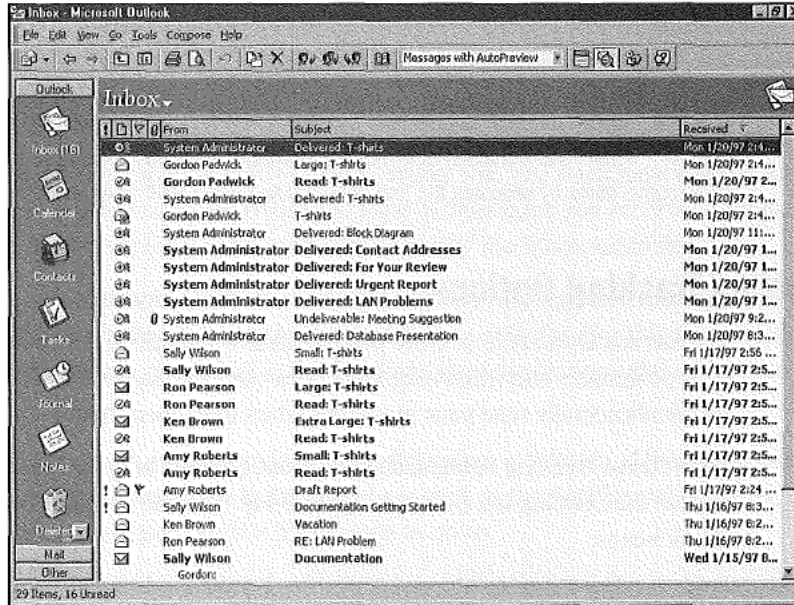
- *Tell Me When All Messages Have Been Delivered.* Place a check mark in this check box to receive confirmation when the messages you send are satisfactorily received by the postoffice.
- *Tell Me When All Messages Have Been Read.* Place a check mark in this check box to receive confirmation when recipients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

NOTE 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.

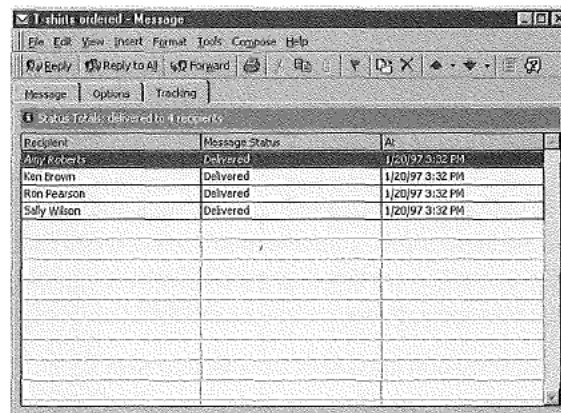
You can also see confirmation messages by selecting Sent Items and double-clicking the original message to see it in the Message dialog box. To do so, you must place a check mark in the Process Delivery, Read, and Recall **R**ceipts on Arrival check box in the E-mail tab of the Options dialog box (refer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

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.



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.

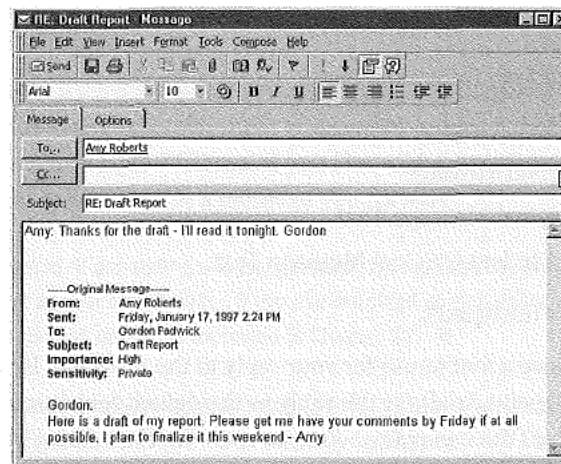
Replying to a Message

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.



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.

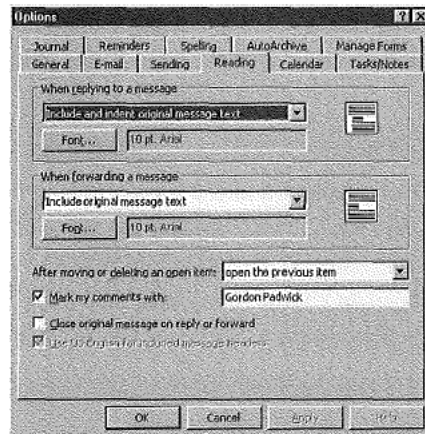
Whether you choose Reply or Reply to All, you can click To to display the Select Names dialog box in which you can add and delete names in the To, Cc, and Bcc lists.

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.

Forwarding a Message

When you choose **F**orward, Outlook creates a Message dialog box similar to that shown in Figure 9.39, but without any recipient names. Click **T**o to open the Select Names dialog box in which you provide recipient names. After you've done so, click **O**K to close the dialog box, add annotations to accompany the forwarded message as described in "Annotating a Message," and click **S**end 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 **T**ools, **O**ptions, 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 **W**hen **F**orwarding 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 **F**ont 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. ■

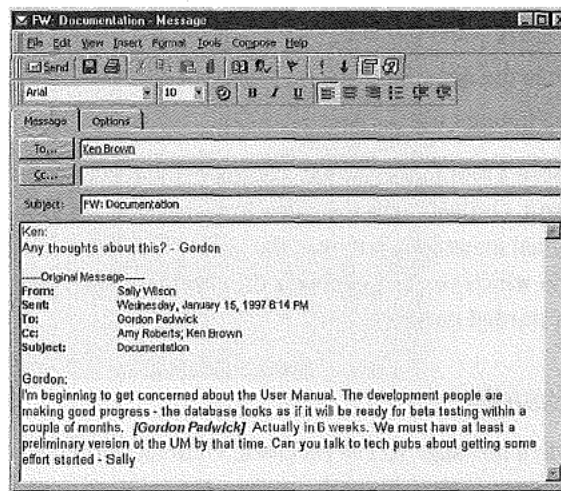
To prepare to annotate messages, choose **T**ools, **O**ptions to open the Options dialog box and choose the Reading tab shown previously in Figure 9.40. Place a check mark in the **M**ark My Comments With check box and, in the adjoining text box, enter text, such as your initials or name, by which you want to identify your annotations. Choose **O**K 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

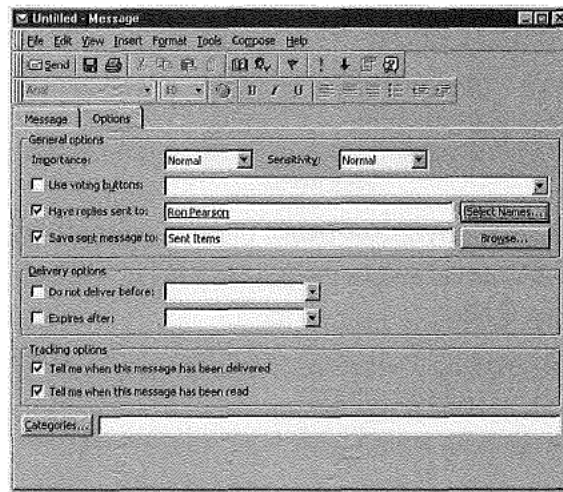
There are times when you send a message and you know you won't be around to receive replies. Rather than let replies languish in your mailbox until you return, you may want replies to be addressed to a colleague. Of course, you could include a note asking recipients to reply to someone else, but there's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

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.

NOTE 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**.

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.

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.

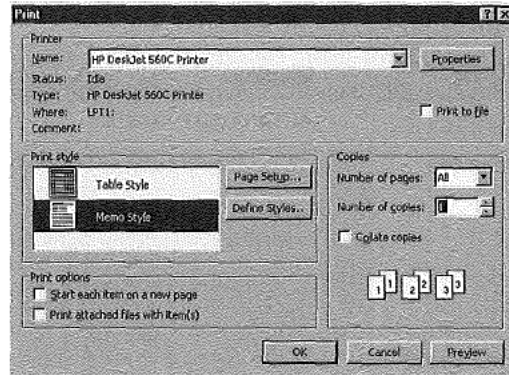
Choose the options you want in the Print dialog box, then click **OK** to send your messages to the printer.

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FIG. 9.44
Use the Print dialog box to choose how you want to print messages.



NOTE 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.

- 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.

NOTE 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.

NOTE 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.

- *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.

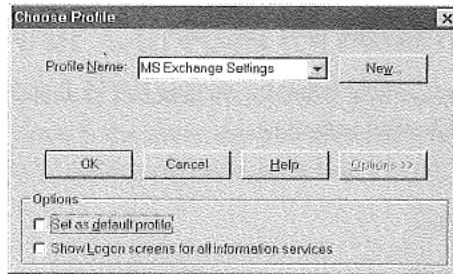


2. Select the profile you want to use from the Profile Name drop-down list box.
3. Choose OK to use the profile as the one for this session and to display the Outlook application.

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.

FIG. 12.2
Setting a default profile saves a step when starting an Outlook session.

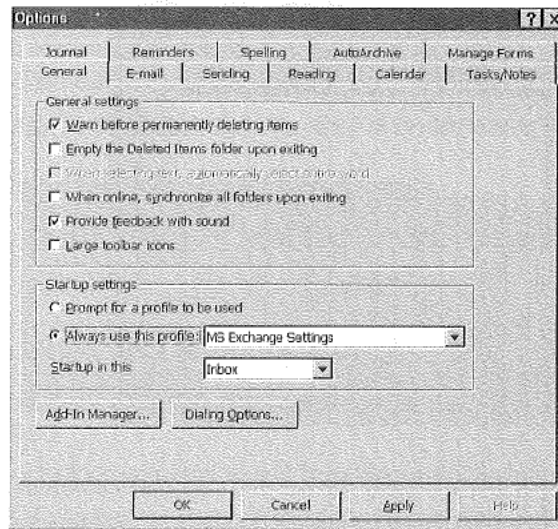


4. Click the Set as Default Profile check box.
5. Choose OK to set the default profile.

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.



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.

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:

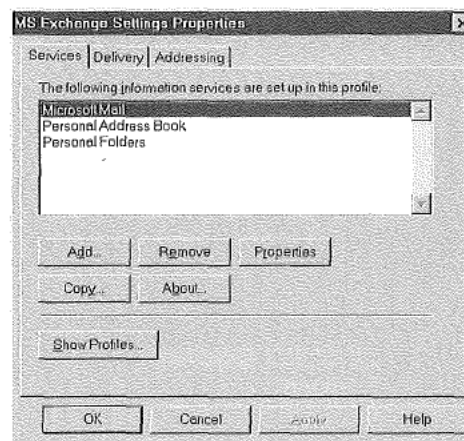
- Create new profiles
- Modify existing profiles
- View profile information
- Copy profiles
- Delete profiles

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 **S**ettings, **C**ontrol 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 **P**roperties 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 **C**ancel to return to the MS Exchange Properties Settings window. Choose **O**K to close the window. Choose **C**lose to exit the profile information.

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.

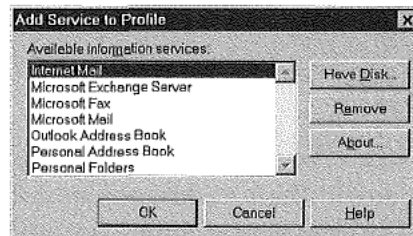
Adding a Service to a Profile

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:

NOTE The Fax service does not ship with Windows NT 4.0. ■

1. From the Start button on the desktop, select **S**ettings, **C**ontrol 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 **A**dd 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: