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Outlook 2007 for PRH

Some of the features available with MS Outlook that may not have been available before:

- Public Folders – a set of folders accessible to all users. Can be used to store things like a main contact list, vacation schedules, etc.
- Out of Office Assistant – A rule that will automatically reply to your email when you are out of the office.
- Shared Folders – You can open other users' folders to view, modify, and delete items (depending on the permissions given)
- Group schedules – Create schedules for entire groups of people
- Delegates – Allows another user to send email and perform tasks on your behalf.
- Global Address List – A list of users that is on the server and is accessible to all users.
- Data Management – Recall sent messages or restore deleted items.

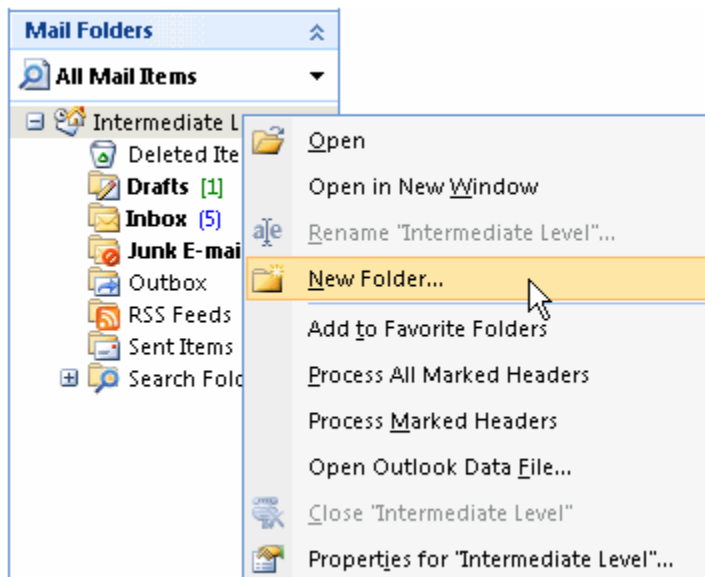
Basic send/receive/reply/forward/attach

Before you can begin organizing the imported email, we have to set up a few folders and rules so it will go quickly. We will also work on categories.

Managing Folders

To create a new folder:

Right click on the user name at the top of the left side navigation menu.



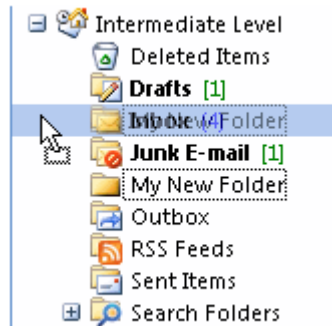
Type a name in the top line of the dialog box that opens.

Choose the type of items you will be storing in it. (Mail and Post items will probably be the one you use most often).

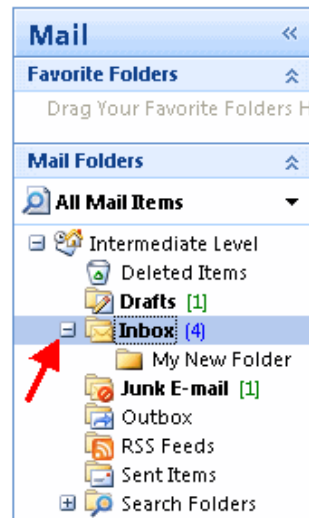
Now choose what folder you want to place it in (or under). The folders will appear in the list in alphabetical order. Click OK.

Should you ever want to rename a folder, right click it and choose rename. Default folders (Inbox and Junk cannot be renamed.)

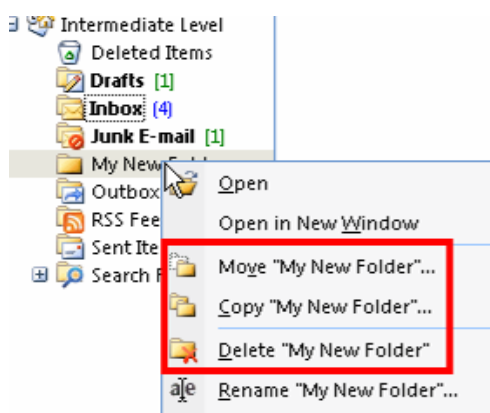
You can change the location of a folder by dragging and dropping it. Here we are moving a folder into the Inbox.



When a folder has other folders inside, it will have a + or – sign in front of it to collapse or expand the folder.



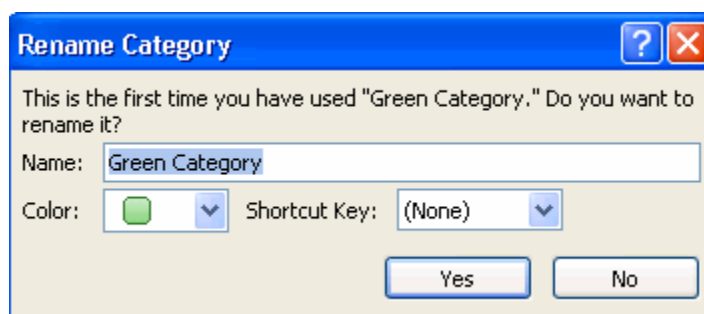
You can also right a folder to rename, move, copy, or delete it.



To move mail to a folder, you can drag and drop one (or several emails), or use the right-click/move command.

Managing Categories

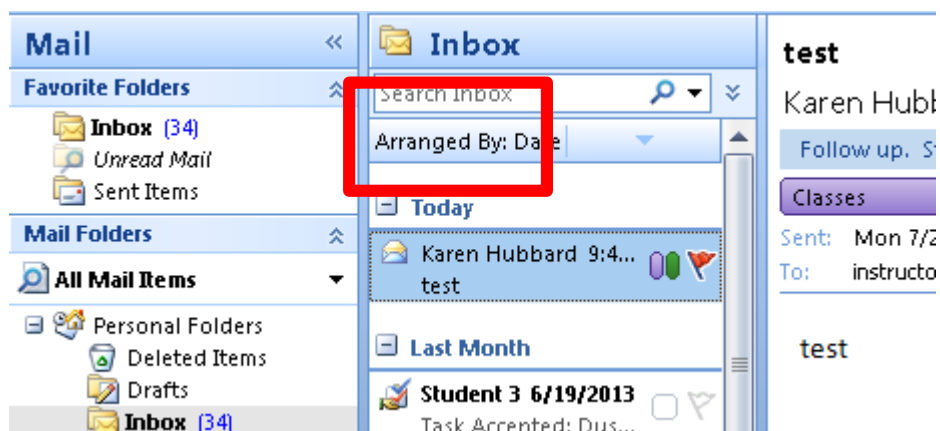
Outlook has default categories set up. They are named “Red Category”, “Green Category”, etc. You can change the names, add or delete categories, and assign different colors as you need. The categories can be used to organize your email as well as make it easier to sort and search. The first time you use a category you will be prompted to rename it. If you choose a new color, a new (additional) category will be created.



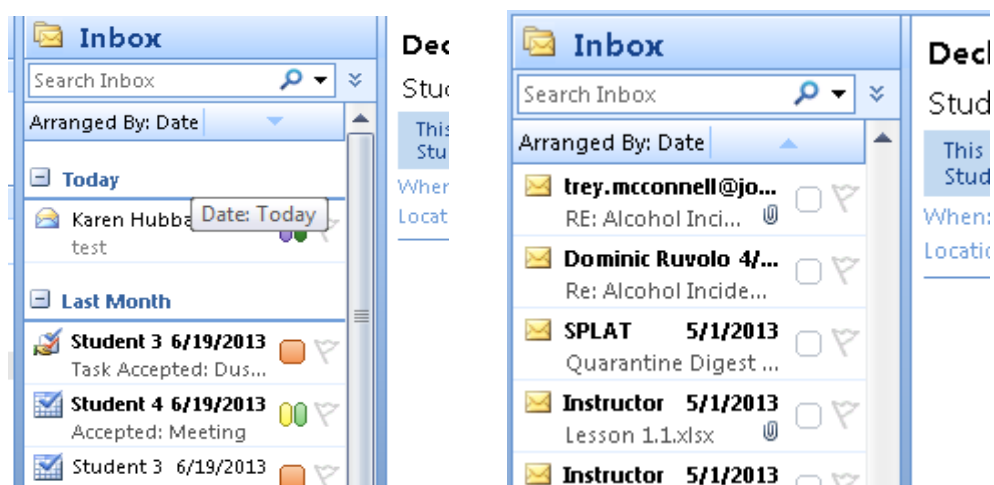
To make a new (or change an existing) category: Select one email. This will enable the category icon on the tool bar. Click on it.



Choose All Categories (probably near the bottom of the list). This window will open:

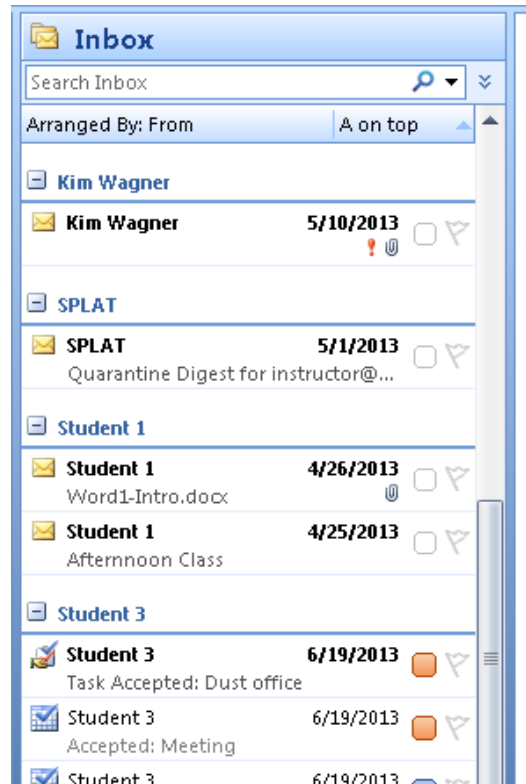


Here is a shot of my email sorted by Date, most recent on top, then earliest on top:

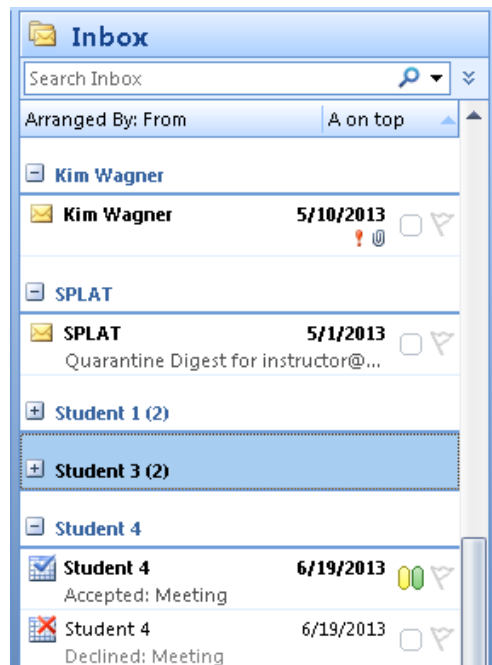


Here is a shot of my inbox with the email sorted by Sender (From: in the arranged by list)

Note that 'A' is on top.

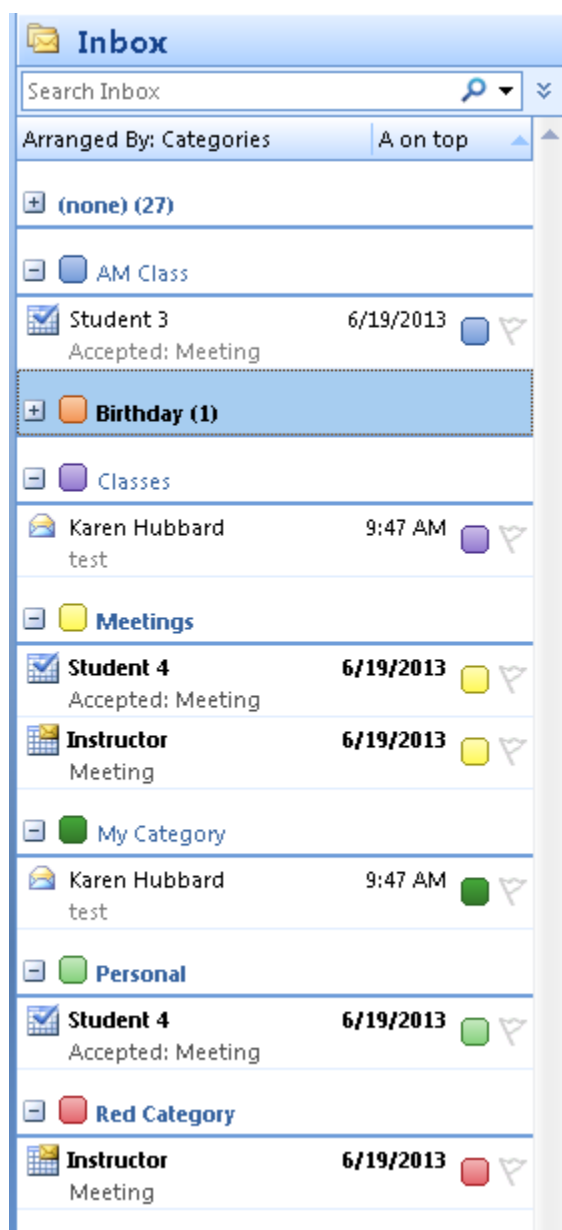


Notice the '-' signs. These allow you to collapse or expand each section as needed.



(The bolding of some of the email means that it hasn't been read yet, once it's been read, it will show with a normal font).

Finally, a shot of the Inbox sorted by categories: They will sort in A to Z or Z to A order, (using the name of the category). If an email has no category assigned, it is filed under (none), which will be sorted on top in the A to Z listing.

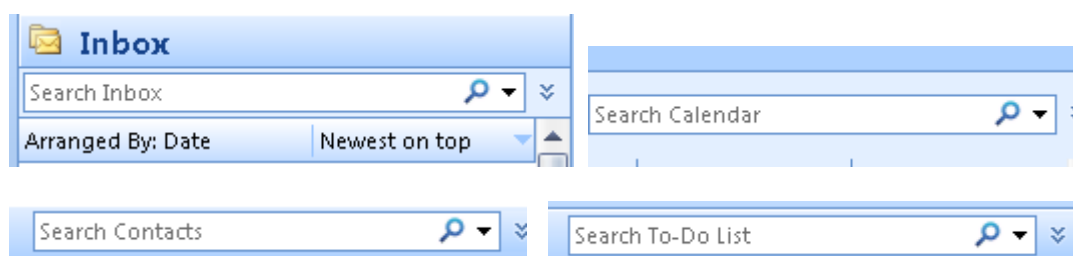


While categories and the different ways to sort email are helpful, you should probably get into the habit of organizing your email into folders as the Inbox is really supposed to function only as a temporary holding area for email.

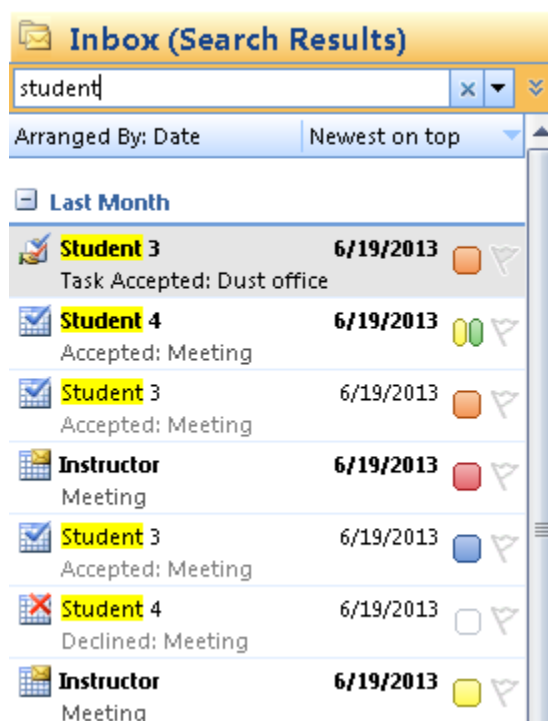
Searching your email

Outlook offers several tools for you to use to find things. You can search email, contacts, calendar, notes, journal, and task items.

The search box near the top of the screen is the most direct way to search in Outlook.



This search box works very much like search engines on the internet. Type in the search term (or keyword) and press Enter.



Outlook searched the subject lines, the From: box, the To: box and the body of each email.

Afternoon Class

Student 1 [student1@whoyouis.net]

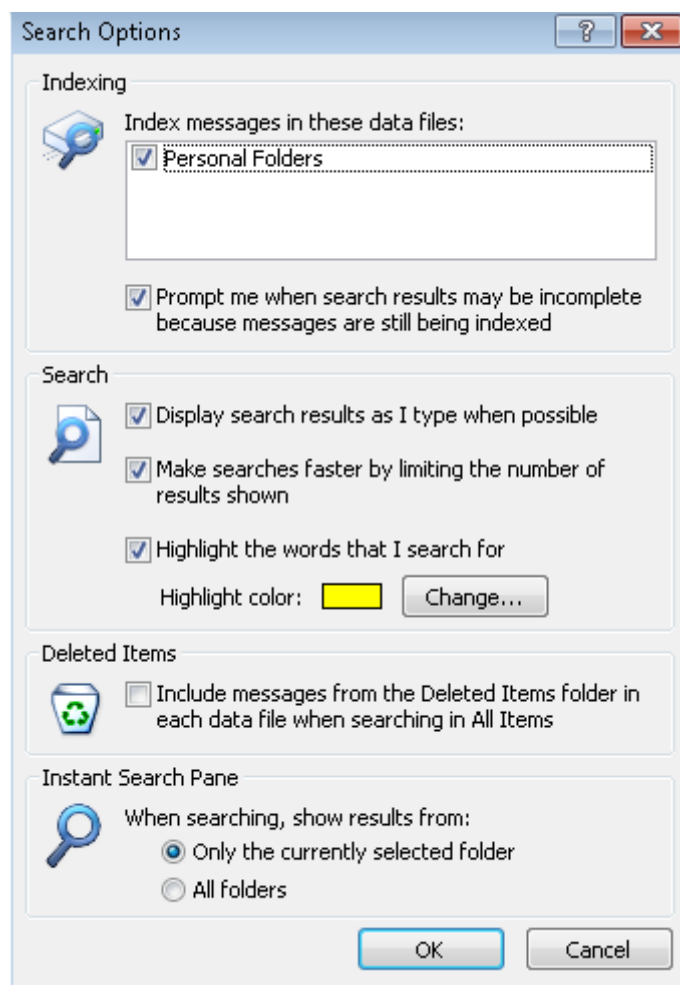
Sent: Thu 4/25/2013 1:56 PM

To: K2 Instructor; Student 1

Cc: Student 2

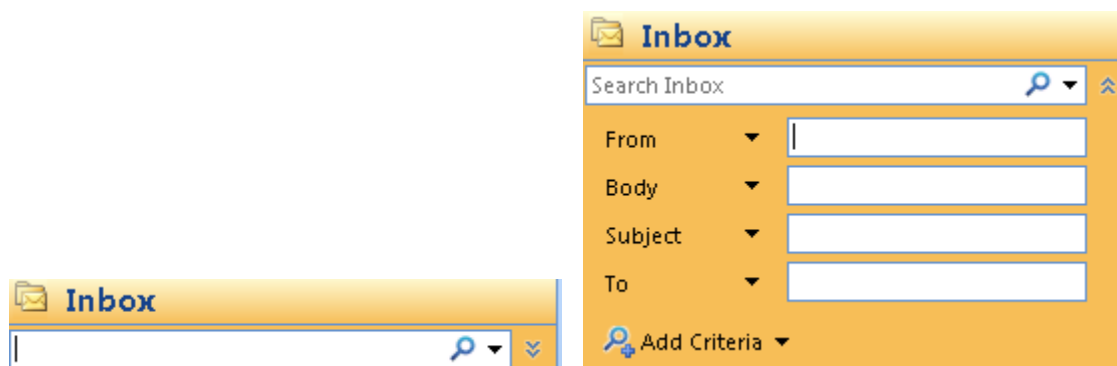
The class has been so nice because I am a only student.

This search will only search the current folder (in our case, the Inbox) unless you set other options. If you click the drop down arrow and choose Search Options, you will see this window:



By changing the bottom option, you can make the Instant/direct search look through all your folders instead of just the current one. (You do not have to set this with every new search. Once it's been set and you click OK, it stays that way until you change it).

You can add more criteria to the search if you like by clicking on the chevron just outside the instant search box.



This should help narrow your search considerably.

Creating Search Folders

If you find that you are regularly searching for the same things, you can create search folders that will update every time you use them. Search folders combine the convenience of folders with the power of searching. Say you file your email according to the projects they're associated with – but you'd also like to view them based on who sent them. You could open the folder and use the Instant search, but you may find yourself doing that over and over again. A search folder can save you time.

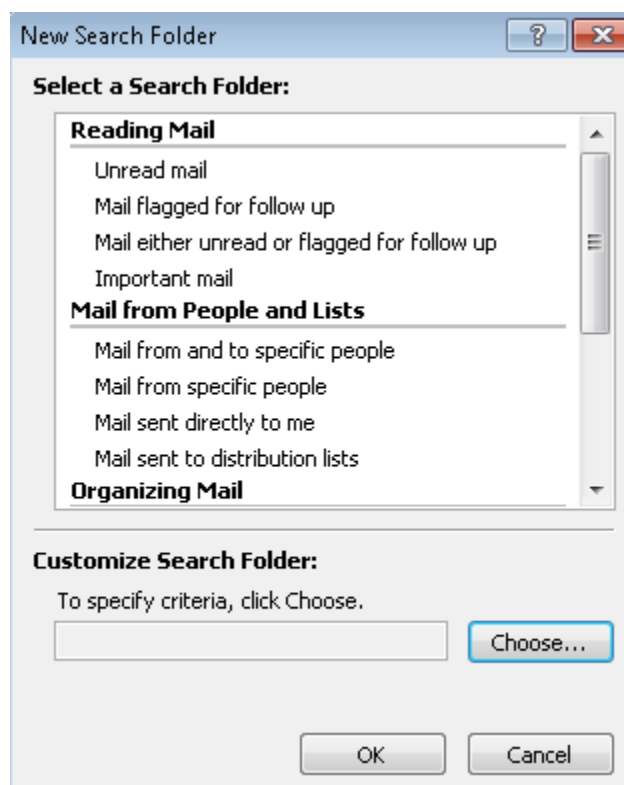
Search folders don't actually hold the emails, they're more of a list or report of the emails that meet the search criteria.

To create a search folder, right click on the Search Folders in the menu.



Choose New search folder.

Choose the criteria from the lists provided or click on custom to create your own.



When you're done, click OK. Now when you want to perform this specific search, all you need to do is open this search folder and all the email that meets the criteria will be collected in the search folder. All you need to do is click on the specific message you needed.

Creating Rules

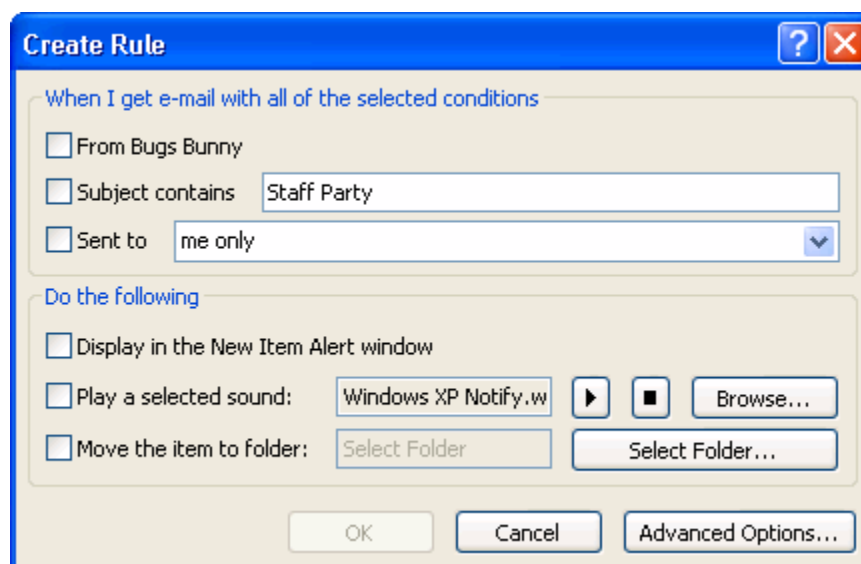
If you want to move your messages from the Inbox to certain folders, assign categories, or perform other actions on an email, you can set up rules so the action will be performed automatically. You can set up rules to be used for long-term organization or just to get your Inbox cleared of the imported emails from Gmail.

Use the Rules & Alerts Wizard to create these automatic actions.

You can get to the wizard in one of a few ways:

- Click the Create Rule (📧) button on the Standard toolbar
- Right-click an e-mail and click Create Rule
- Click the Tools menu and click Rules and Alerts

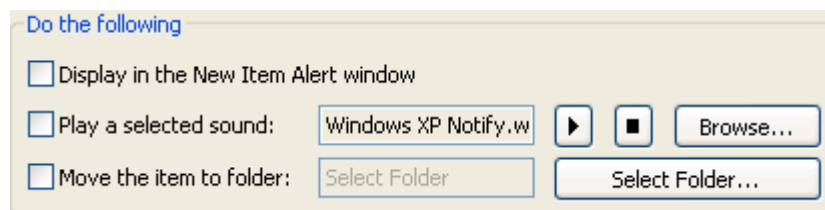
With either of the first two choices listed above, you will see this dialog:



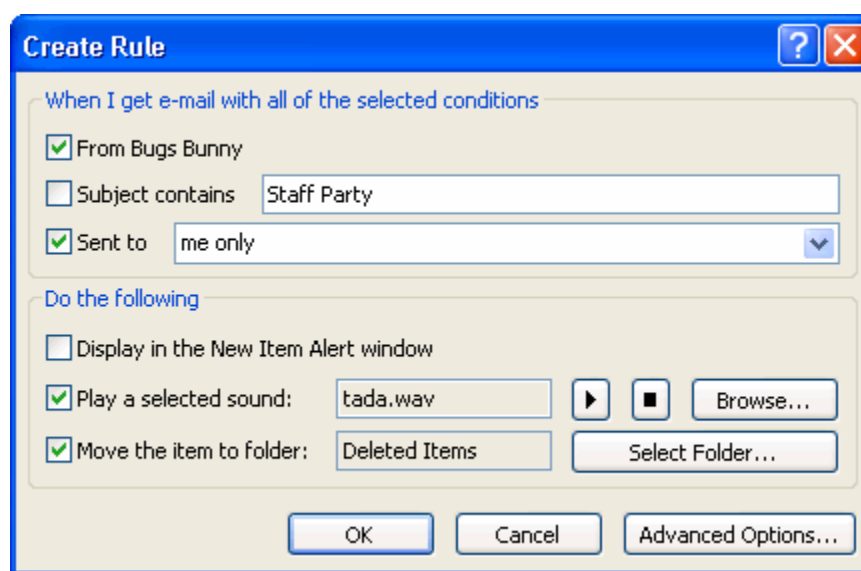
This is a simplified version of the Rules and Alerts wizard, which we'll talk about in a minute. It's a great way to create a quick rule.

The first part of the box ("When I get e-mail with all of the selected conditions") specifies when the rule will act; the second part ("Do the following") specifies what will happen when the type of e-mail you've specified arrives. At least one of the boxes in each section needs to be checked for the OK button at the bottom to light up.

The second set of boxes tells Outlook what actions to take when the conditions in the first set of boxes are met:

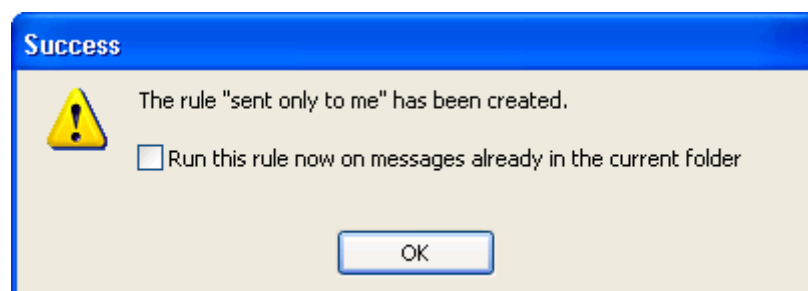


Here is a completed Create Rule box.



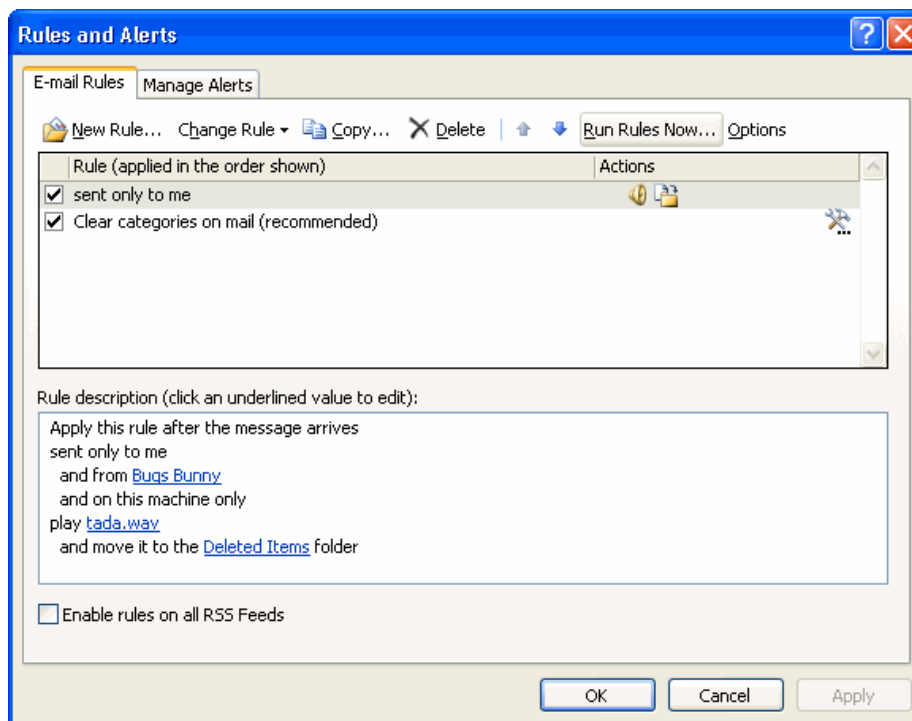
This rule will tell Outlook that when an e-mail arrives from Bugs Bunny, and was sent to me only, Outlook should play the tada.wav sound, and move the e-mail to the Deleted Items folder.

Once we click OK to this box, Outlook will bring up another box confirming that the rule has been created. You'll also have an option to run the rule on messages already in the folder, which will help if you've created the rule after a lot of e-mail has arrived.

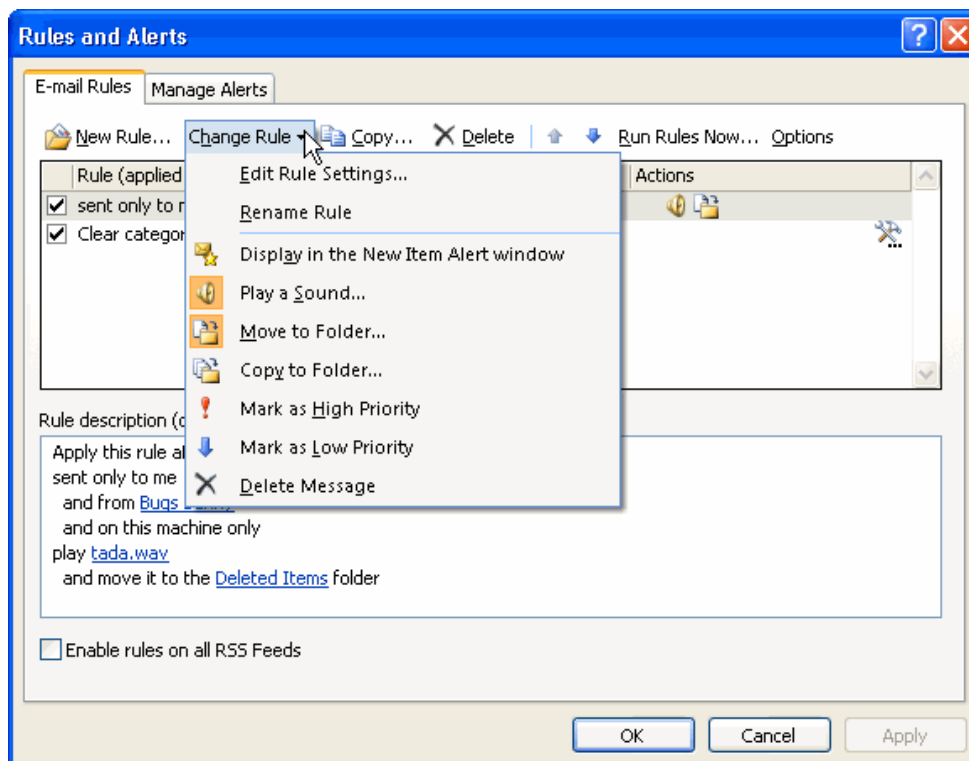


If you click the Advanced Options button in the above figure, you'll get a totally different screen: step 2 of the Rules and Alerts wizard.

Let's look at the Rules and Alerts wizard from the beginning. To launch it, just click the Tools menu and click Rules and Alerts, or click the Rules and Alerts button (🏠) on the Advanced toolbar.

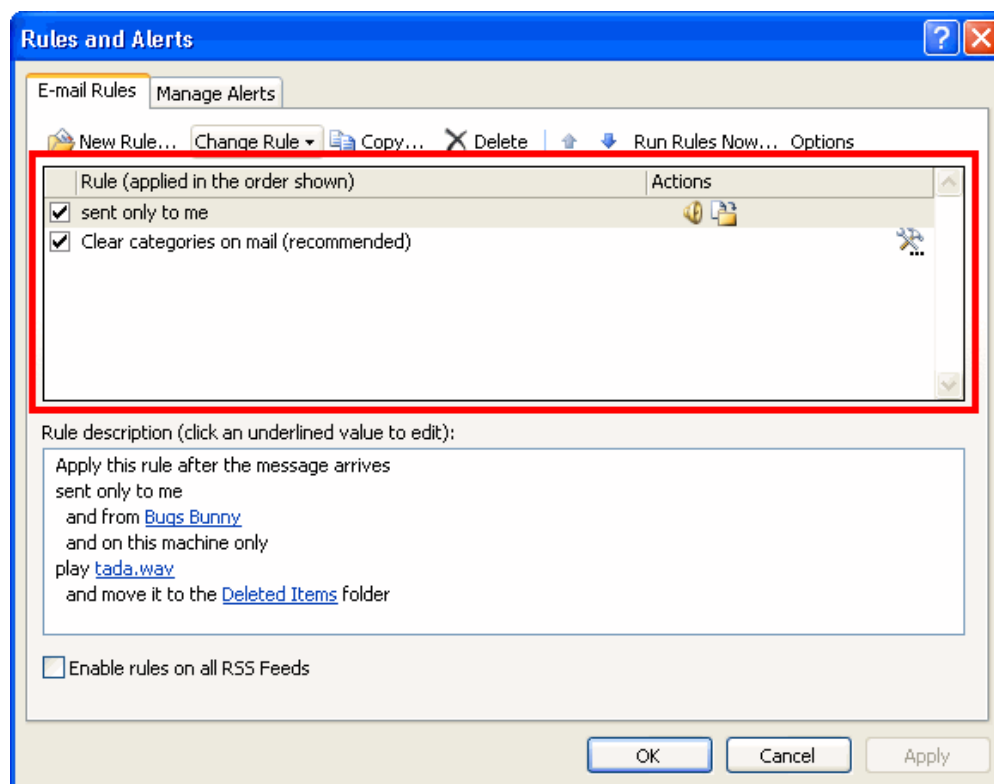


The toolbar at the top of the dialog gives you options to create a new rule; to change, delete, copy, or move the selected rule; or to run the rule now. The Options button allows you to import, export, or upgrade your rules. If you're just looking to make a quick change to a rule's action, the Change Rule button is the best way to do it.



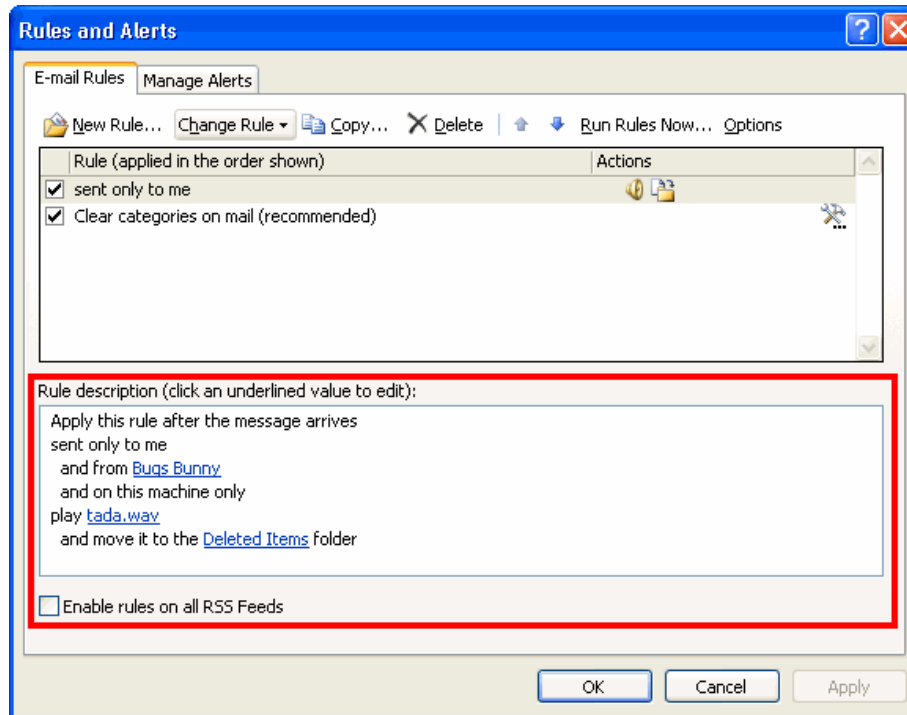
All of the options in the menu are pretty self-explanatory: you can rename the rule or add different options. You'll notice that there are some new options that we didn't have in the Create Rule dialog box, like changing the message's priority. The options that are already in use for the rule are highlighted with an orange icon (for example, Play a Sound and Move to Folder in the sample menu above). You can click those options to remove that action for the rule.

The icons you see in the menu are important when we're looking at part 2 of the Rules and Alerts box.



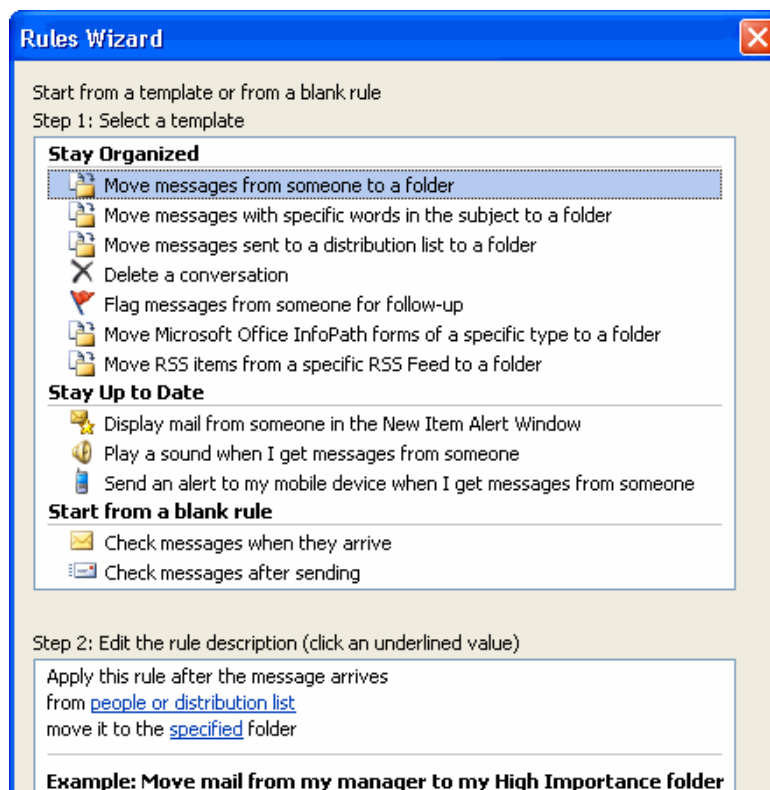
This section is a list of the rules that are in place and the actions that Outlook will take. The actions are identified by the same icons that we saw in the Change Rule menu. In the list, there's also a checkbox by the name of each rule. If the box is checked, the rule is on; if the box is unchecked the rule is off. You can click in the checkbox to change this on/off status.

Part 3 of the Rules and Alerts screen will give you a detailed explanation of each rule that is set up.



You can click the parts that are underlined in blue to change that action or value.








To create a new rule, click the New Rule button in the Rules and Alerts dialog. The Rules and Alerts wizard will then launch.



Starting from a template

First, choose to start from a template or a blank rule.

Stay Organized

-  Move messages from someone to a folder
-  Move messages with specific words in the subject to a folder
-  Move messages sent to a distribution list to a folder
-  Delete a conversation
-  **Flag messages from someone for follow-up**
-  Move Microsoft Office InfoPath forms of a specific type to a folder
-  Move RSS items from a specific RSS Feed to a folder

Then, click the blue underlined items to choose a specific value.

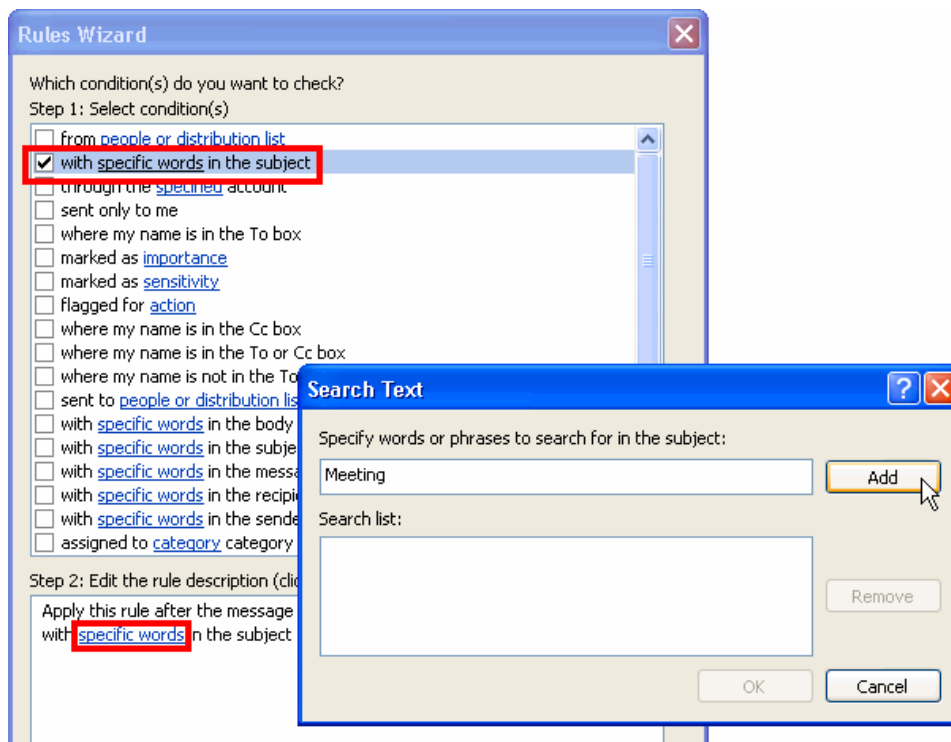
Apply this rule after the message arrives
 from people or distribution list
 flag message for follow up & this time

Example: Flag mail from my manager for follow-up today

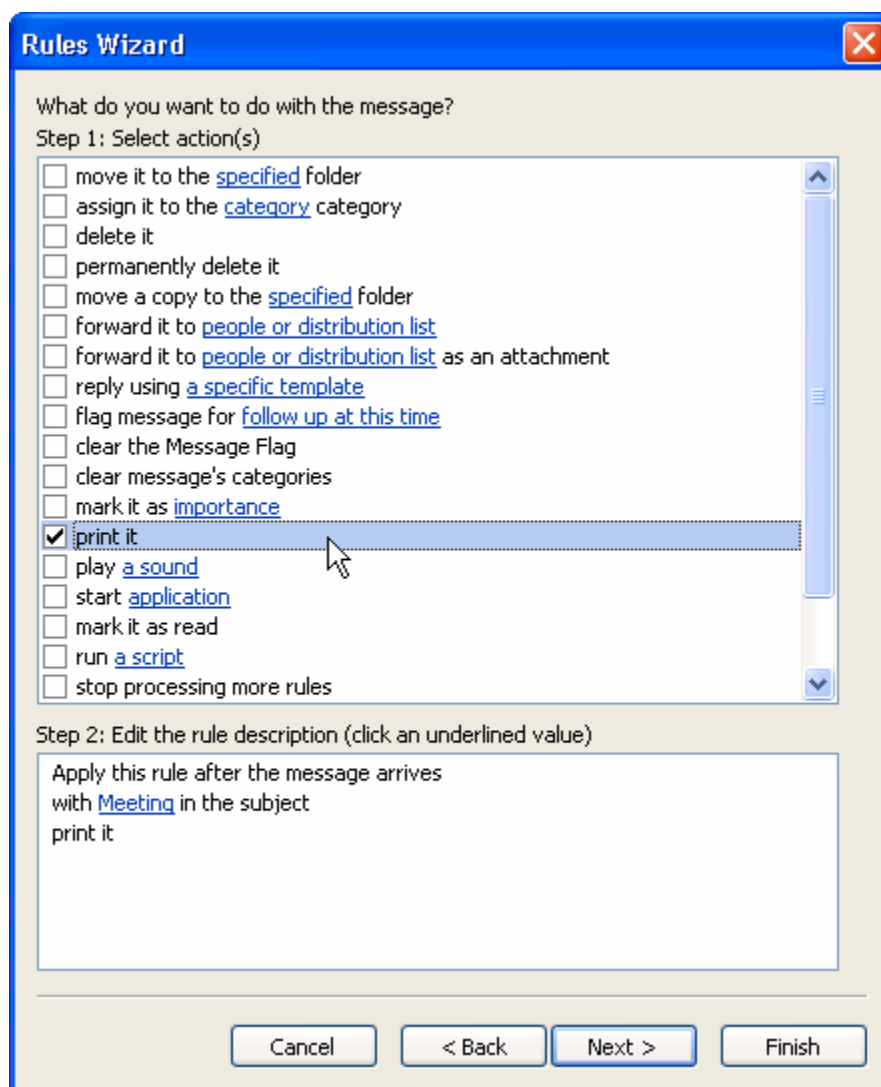
If you start from a template, the remaining steps in the wizard will be filled out for you. Simply confirm your choices by clicking Next, or click Finish at any point.

Starting from a blank rule

If you choose to use a blank rule, none of the boxes will be checked when you click Next, so it's up to you what conditions you pick. It's the same idea as before: check the conditions in Step 1, and then click the underlined value in Step 2 to specify your information. In this example, we checked "with specific words in the subject" and then clicked "specific words" in Step 2. Now we'll type the words and click Add.



Once you've set the options in this window (you can check as many as you want) and filled out the values, you can click Next. (If you forget to click an underlined value in step 2, Outlook will force you to fill out the information before you proceed.) You will then see this window:



This is where you can tell Outlook what to do when the conditions that you specified in the first part of the wizard are met. Once you check an item in Step 1 of this box, you may need to click the underlined value in Step 2 to specify your information. You will also see the conditions that you chose in the previous dialog listed.

Once we click Next, we'll see our last set of options.

Rules Wizard

Finish rule setup.

Step 1: Specify a name for this rule

Meeting

Step 2: Setup rule options

Run this rule now on messages already in "Inbox"

Turn on this rule

Create this rule on all accounts

Step 3: Review rule description (click an underlined value to edit)

Apply this rule after the message arrives
with Meeting in the subject
print it

Cancel < Back Next > Finish

Step 1 in this window is to name your rule; this is the name that will appear in the main Rules and Alerts screen.

In Step 2, you can tell Outlook when to run the rule. The first option tells Outlook to run the rule on messages already in the folder you're in. (You can't change the folder for this first option; you can just check the box to run the rule, or uncheck the box so the rule isn't run in that folder.) The next box is checked by default; this will turn your rule on. The third box, "Create this rule on all accounts," is available only if you have multiple e-mail accounts set up.

Step 3 gives you a summary of the conditions, actions, and exceptions for the rule you've created. Once you're done, you can click Finish, and you'll be back to the main Rules and Alerts screen.

Here, you can click **Apply** and **OK** to save your changes, or **cancel** to remove your changes. (Be careful; if you've added a rule but you cancel out of the **Rules and Alerts** box, that rule will be deleted.)

In summary, there are three ways to create rules in Outlook:

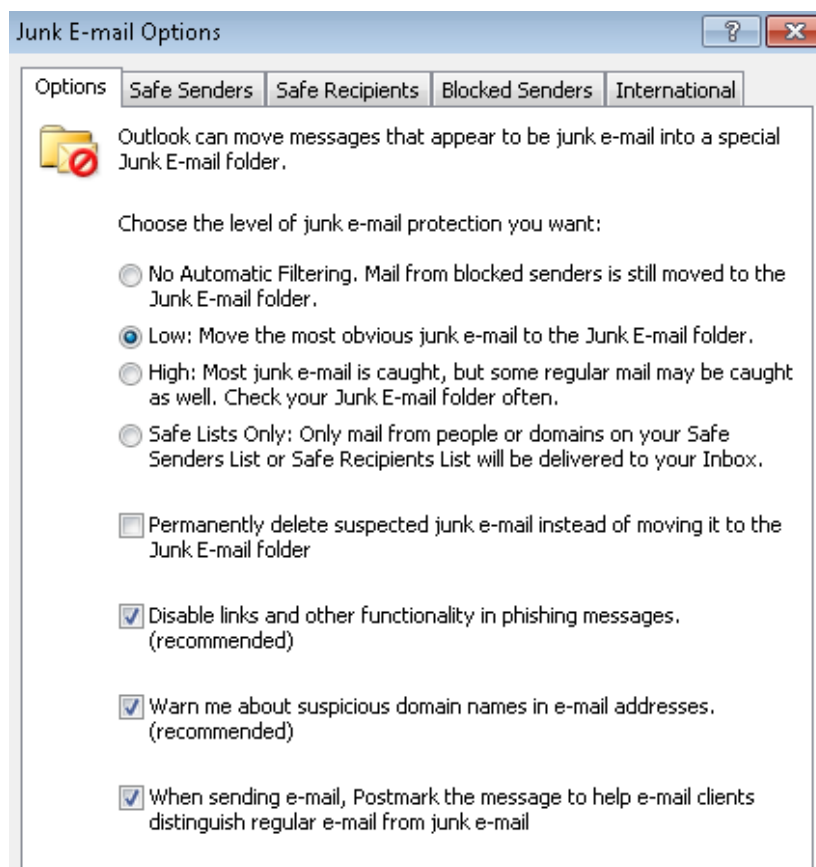
- **Create Rule box:** The easiest way with only the most frequently used options available.
- **Rules and Alerts main screen:** A few more options and a nicer interface, but still pretty easy to use.
- **Rules Wizard:** More time-consuming and complicated, but has all options available.

Once you get the majority of the messages sorted into folders, you can delete the rule if you'd like. If you want to leave it in place, notice that some of the rules may move messages from your **Inbox** to a folder before you read them. (If that's how you created the rule). You'll have to open those folders in order to read the messages.

Junk E-mail

You can manage junk mail in Outlook by setting rules for how strict it should be when it looks at your incoming email.

Click **Tools**→**Options**→**Junk E-mail** (on the **Preferences** tab)



Low is the default setting for Outlook.

The first check box option (Permanently delete suspected junk email instead of moving it to the Junk Email folder) is not recommended because you will not even get a chance to see what Outlook is deleting before it's gone. Leave this box unchecked, and you will be able to check the Junk Mail folder to see if a message ended up there even when it's not junk.

The second check box is the phishing filter. It is recommended that you leave this on so the links are disabled. Phishing links will take you to sites that look legitimate, but are not. They are an attempt to get you to enter personal information so that it can be stolen.

Advanced Mail Options

Add voting options

- Start a new message
- Click on the Options Tab
- Choose Use Voting Options

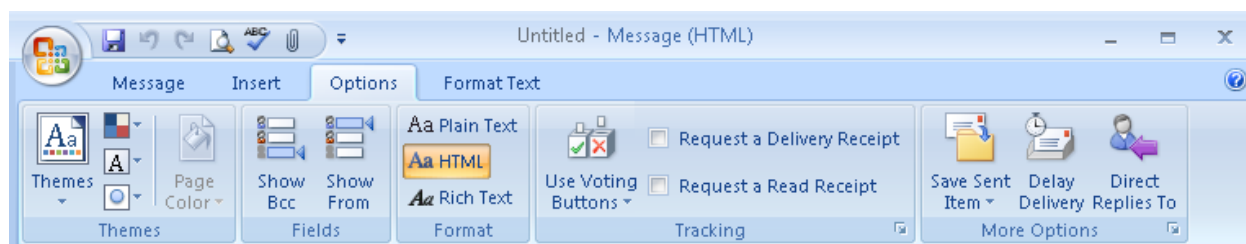
Change the Reply-To Address

- Click the Direct Replies to: on the Option tab of a message

Delay Delivery

Options Tab – Delay Delivery (when you want to send the message at some point in the future instead of immediately)

Read & Delivery Receipt



Shared and Group Calendars

Outlook allows you to share your calendar as well as create group calendars for multiple people to use and view.

Sharing Your Calendar

Go to the calendar section of Outlook. In the navigation pane (left side of the window), click on 'Share My Calendar'

Enter the email addresses of the people you want to share with in the To: box. Hit Send.

When they get the email, they will be able to accept the sharing invitation and share back if they want. Once you've shared your calendar, you can adjust the permissions to let others add or delete items to your calendar or just view them.

Open a Shared Calendar

To open a shared calendar: Click on the accept link in the email.

You can also go to the calendar section of Outlook and click on 'Open Shared Calendar', then enter the name of the person sharing. (Or click and pull their name from the address book).

Now all you need to do is to check mark the calendar(s) you wish to see. You can view them side by side (in different colors) or overlaid (also in different colors).

Creating a Calendar Group

You can create groups of calendars in Outlook so you can see specific schedules in one window.

Go to the Calendar section of Outlook

Click on the Actions Menu

Choose "View Group Schedules"

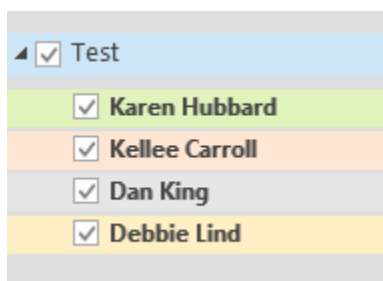
Click "New" and enter a name for your new group then click OK

Click the Add others option, then Add from Address Book option.

Choose the people you want to add to the group and click OK.



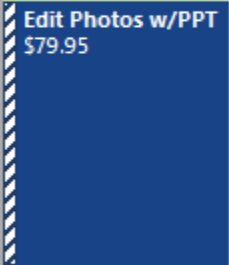
Save and Close the new group.

To view the group, checkmark the group name in the navigation pane. You can also expand the group and view only certain members of it.



July 22 - 26, 2013

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	Tuesday, July 23, 2013	
		
<input type="checkbox"/> <u>Karen Hubbard</u>	 Edit Photos w/PPT \$79.95	
<input type="checkbox"/> <u>Kellee Carroll</u>		
<input type="checkbox"/> <u>Dan King</u>		
<input type="checkbox"/> <u>Debbie Lind</u>	