

NCI Technologies presents:

Microsoft® Office Outlook® 2003 Training



Organize your Inbox

Course contents

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- Lesson 1: Colour code with automatic formatting
- Lesson 2: Find it fast with arrangements
- Lesson 3: Use flags to follow up

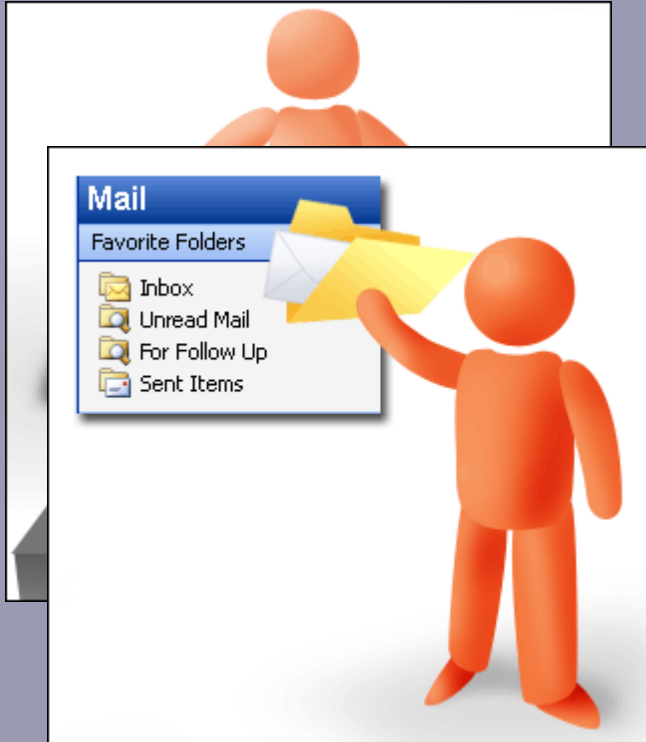
(Continued on next slide.)

Course contents (contd.)

- Lesson 4: Use folders
- Lesson 5: Play favourites

Each lesson includes a list of suggested tasks and a set of test questions.

Overview: Tame the chaos of your Inbox



What's your style in Outlook? Would you say that you organize your e-mail the same way you organize your office?

Your style works for you: Outlook can accommodate you with features that complement your natural work style.

Organize your Inbox

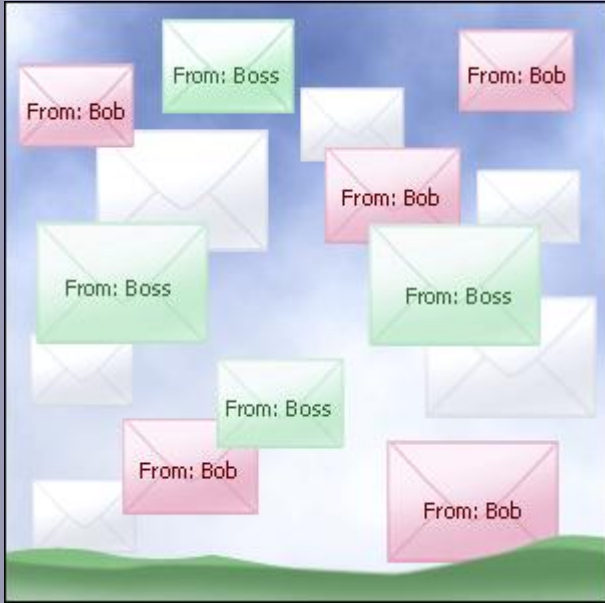
Course goals

- Use colours to make specific messages stand out.
- Easily locate messages by changing the way they are arranged.
- Use flags to set your own priorities for how and when to follow up on messages.
- Organize messages into actual groups and virtual groups by using folders and Search Folders.
- Get easy access to the folders you use most often by adding them to the Favourite Folders pane.

Lesson 1

Colour code with automatic formatting

Color code with automatic formatting



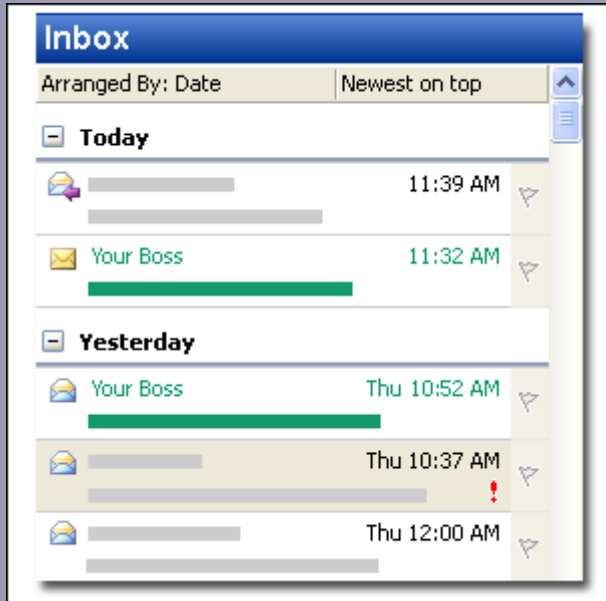
See messages from your boss in one colour and messages from your friend Bob in another.

Whether you keep a lot of e-mail around or only a few messages, you can use colours to help clarify what's there.

You can use the Automatic Formatting feature to instantly organize your e-mail with colour.

Organize your Inbox

Color code messages

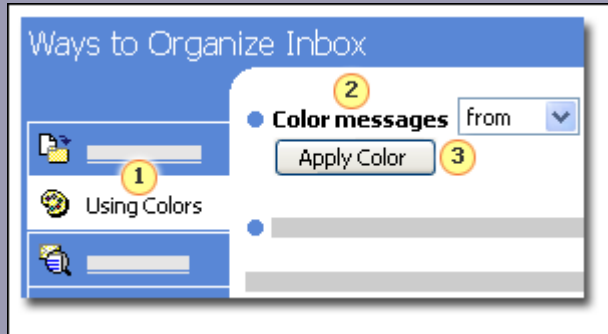


Use Automatic Formatting to make certain messages stand out with colour.

Even if you have thousands of messages in your Inbox, the green ones will catch your attention.

Organize your Inbox

You do it with Organize

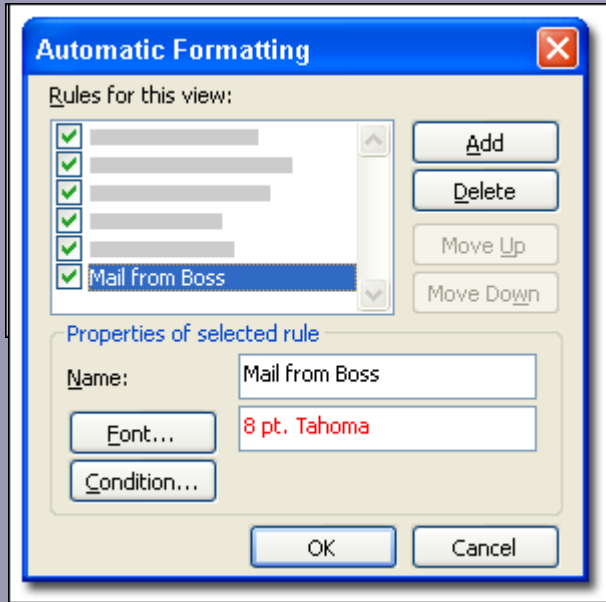


To colour code messages, use the Organize pane.

Once you select a message and click the **Organize** command on the **Tools** menu, you're just a few quick steps away from colour-coded messages.

1. Click **Using Colours**.
2. Set up the rule for colour coding.
3. Click **Apply Colour**.

It's an Automatic Formatting rule



Outlook creates an Automatic Formatting rule and shows you the details in the **Automatic Formatting** dialog box.

To see the rule:

- Click **Automatic Formatting** in the Organize pane.

Suggestions for practice

1. Colour code messages from a specific person.
2. Turn off colour coding.
3. Change the colour used for automatic formatting.
4. Delete the colour coding rule.

Test 1, question 1

**Organizing by colour would help you:
(Pick one answer.)**

1. Make your Inbox pretty.
2. Quickly notice messages from the boss.
3. Group similar messages.

Test 1, question 1: Answer

Quickly notice messages from the boss.

If you set up a rule to colour messages from your boss, you'll be able to spot them right away.

Test 1, question 2

**When you click Apply Colour in the Organize pane, Outlook creates:
(Pick one answer.)**

1. A custom font.
2. A fashion statement.
3. An Automatic Formatting rule.

Test 1, question 2: Answer

An Automatic Formatting rule.

Outlook creates a rule that it applies to the messages in your Inbox, or to the messages in whichever folder you were looking in when you created the rule.

Lesson 2

Find it fast with arrangements

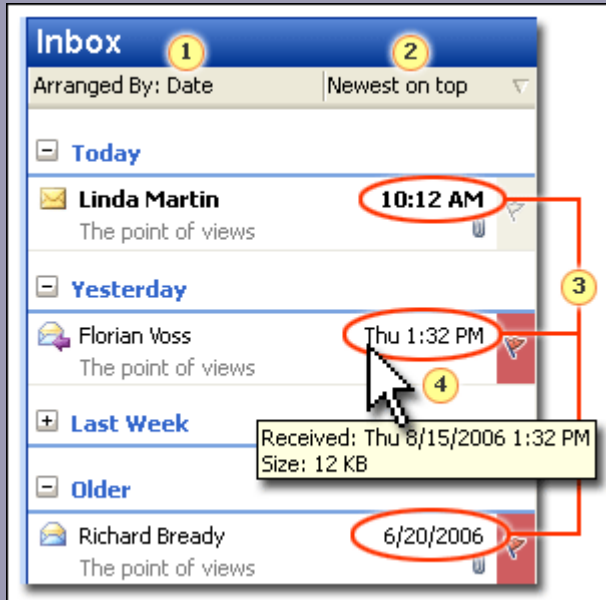
Find it fast with arrangements



You may be able to spot the message you're looking for more quickly by changing the way messages are arranged.

Organize your Inbox

By date, by default

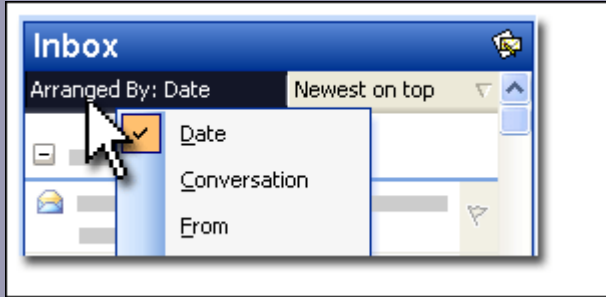


In messages grouped by date, one thing you'll always be able to see is the sender's name.

By default, Outlook shows messages grouped and sorted by date.

1. The type of arrangement.
2. How messages are ordered. Here the newest messages are on top.
3. Outlook displays only relevant date information.
4. To see the full date, position the pointer over the displayed date.

Quickly change arrangements

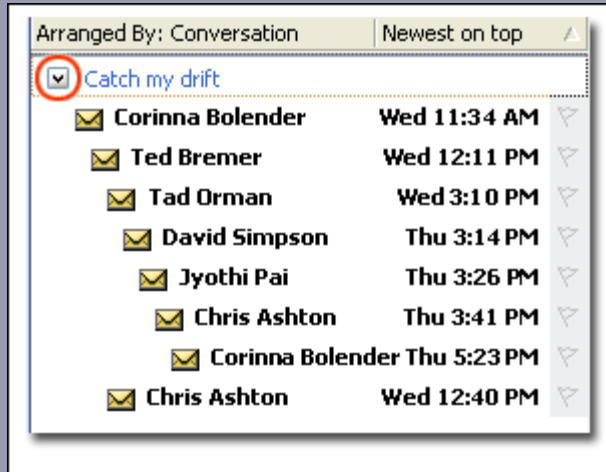


The **Arranged By** shortcut menu

You can also arrange messages other ways: by size, by who they're from, or by subject (to name just a few).

To quickly change from one arrangement to another, you would click **Arranged By** and select the choice that suits you.

Arrange by conversation topic

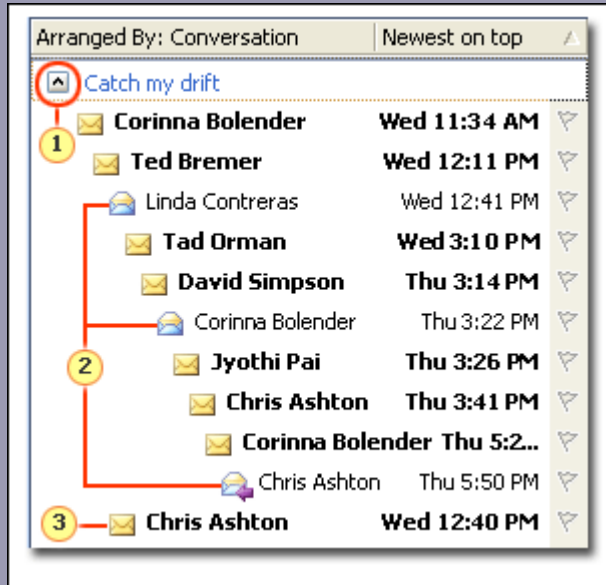


When you arrange messages by conversation topic, only unread messages are displayed.

At first, you'll see only the bits of the conversation that you haven't yet read.

To see all the messages, click the arrow next to the conversation title (circled in the picture).

See the whole conversation



When you arrange messages by conversation, you see the "traffic flow" of a conversation.

1. Click the arrow to show or hide read messages.
2. Read messages appear as open envelopes.
3. The indentation tells you that a conversation split. (This is a reply to Ted Bremer's message above.)

Messages are indented to show you who replied to whom. The dates show you when they replied.

Suggestions for practice

1. Arrange by message sender.
2. Arrange by conversation.
3. Use the shortcut menu to switch to a different arrangement.

Test 2, question 1

**To see who replied to whom (and when they replied), you should arrange messages this way:
(Pick one answer.)**

1. By subject.
2. By conversation.
3. By date.

Test 2, question 1: Answer

By conversation.

Arranging messages by conversation will indent related messages, giving you visual cues about who replied to whom and when they replied.

Test 2, question 2

When you arrange messages by date, Outlook hides certain unimportant message details. Which detail will you always see in this view? (Pick one answer.)

1. The sender's name.
2. The time the message was sent.
3. The day of the week.

Test 2, question 2: Answer

The sender's name.

In the default arrangement, in which you see messages grouped by the date you received them, you'll always be able to see who sent the message. Depending on when you received the message, some details about when the message was sent will be hidden.

Lesson 3

Use flags to follow up

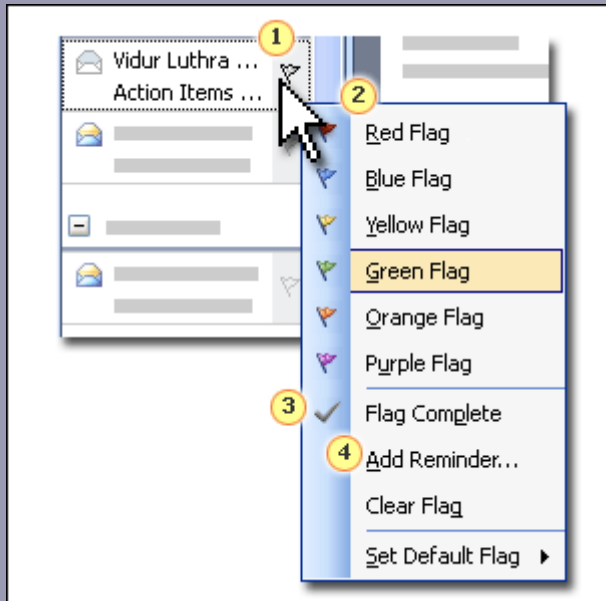
Use flags to follow up



You can use flags to prioritize your messages and follow up.

Organize your Inbox

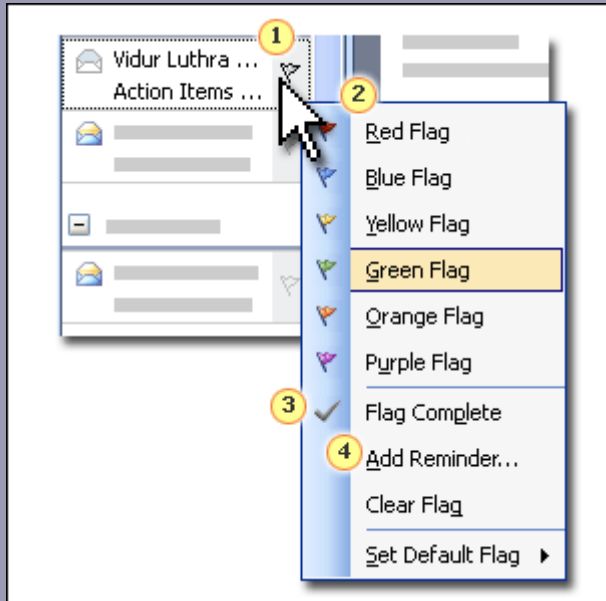
Flag it!



You can flag messages right from your Inbox.

1. The Flag Status column. Right-click here to add a flag.
2. You have six flag colours to choose from. The flags aren't labelled, so you decide what significance to assign a particular colour.

Flag it!

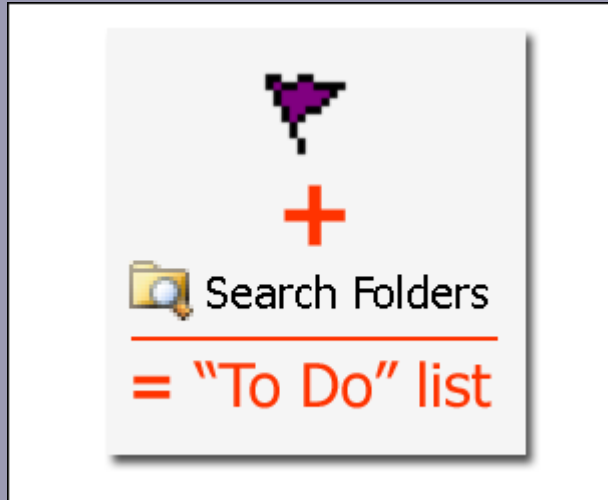


You can flag messages right from your Inbox.

3. When you've followed up, use the **Flag Complete** command to change the flag status.

4. Use **Add Reminder** to set a date and time for a reminder.

Base a "To Do" list on flags



To quickly get organized, a great trick is to use flags with Search Folders.

After you flag a message, it automatically appears in the **For Follow Up** Search Folder.

Suggestions for practice

1. Add a flag by using the Flag Status column.
2. Add a flag to an open message.
3. Add a reminder.
4. Sort messages according to their flags.

Test 3, question 1

**A red message flag signifies which of the following:
(Pick one answer.)**

1. Highest priority.
2. Urgent.
3. Whatever you want it to mean.

Test 3, question 1: Answer

Whatever you want it to mean.

With Outlook flags, you decide what the colours mean. You have six to choose from.

Test 3, question 2

Flags can be a great way to create a "To Do" list when you combine their use with this feature: (Pick one answer.)

1. Search Folders.
2. Reminders.
3. Flag poles.

Test 3, question 2: Answer

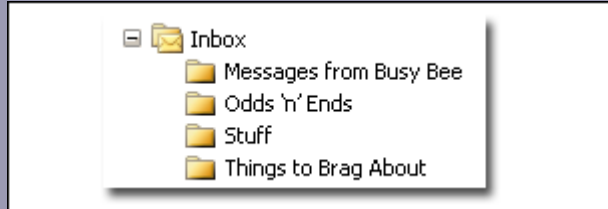
Search Folders.

When you attach a flag to a message, it will automatically show up in the **For Follow Up** Search Folder. You can look in this folder to see your "To Do" list. (See the next lesson to find out more.)

Lesson 4

Use folders

Use folders

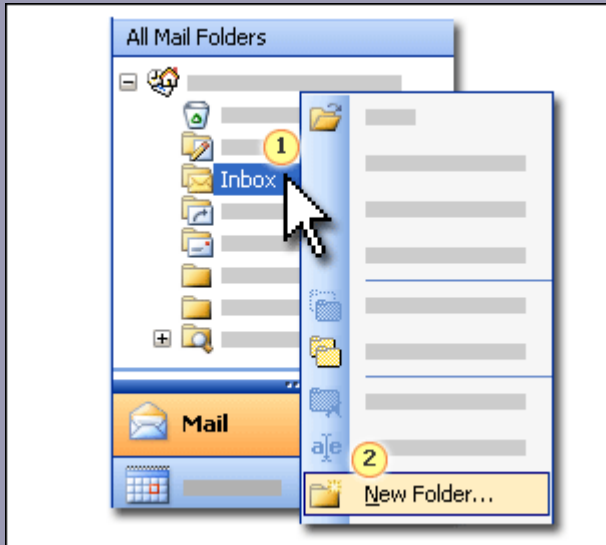


Folders can help you sort your messages into intuitive groups.

Folders can reflect your personal needs and interests.

Organize your Inbox

How to create a folder in your Inbox

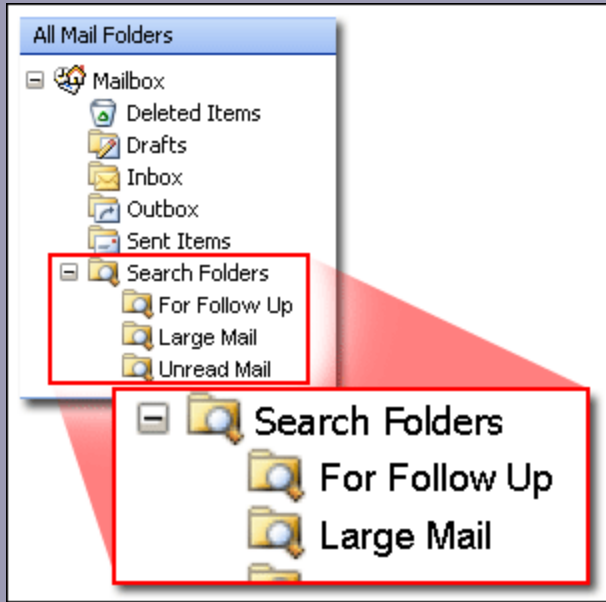


1. Right-click **Inbox**.

2. Click **New Folder**.

Then, you would type the name of the new folder and click **OK**.

Use Search Folders



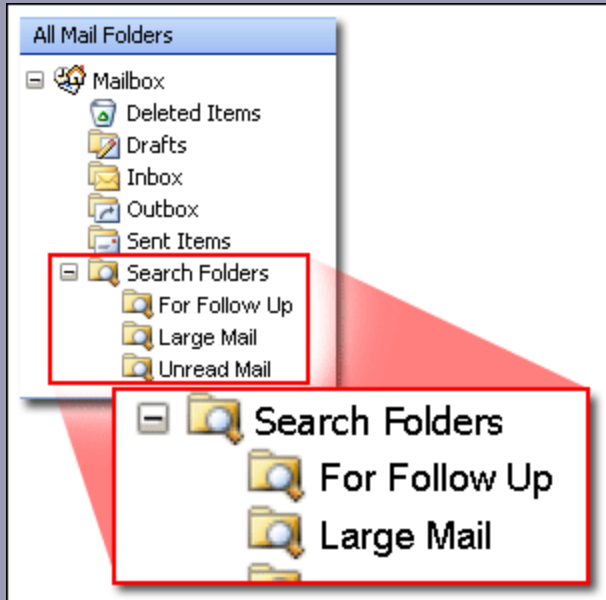
A Search Folder is a virtual folder that lets you see a particular group of messages without having to physically move or copy them anywhere.

It displays messages based on the results of the search criteria you specify when you create the folder.

With Search Folders, a message can be in two or more places at once.

Search Folders appear along with the rest of your mail folders in the Navigation Pane.

Use Search Folders



Outlook creates three Search Folders by default:

- For Follow Up
- Large Mail
- Unread Mail

Search Folders appear along with the rest of your mail folders in the Navigation Pane.

Organize your Inbox

Suggestions for practice

1. Create a folder by right-clicking.
2. Create a folder from the **File** menu.
3. File messages.
4. Use one of the default Search Folders.
5. Create your own Search Folder.

Test 4, question 1

**To display messages in a Search Folder, you would:
(Pick one answer.)**

1. Move the messages into the folder by dragging them.
2. Specify the appropriate criteria when you create the folder.
3. Move the messages into the folder by right-clicking them, and then clicking **Move**.

Test 4, question 1: Answer

Specify the appropriate criteria when you create the folder.

A Search Folder displays messages based on the results of the search criteria you specify when you create the folder.

Test 4, question 2

**The For Follow Up folder, a default Search Folder, will display flagged messages from which of the following folders:
(Pick one answer.)**

1. All folders in your mailbox.
2. The Inbox only.
3. Only those folders that you specify.

Test 4, question 2: Answer

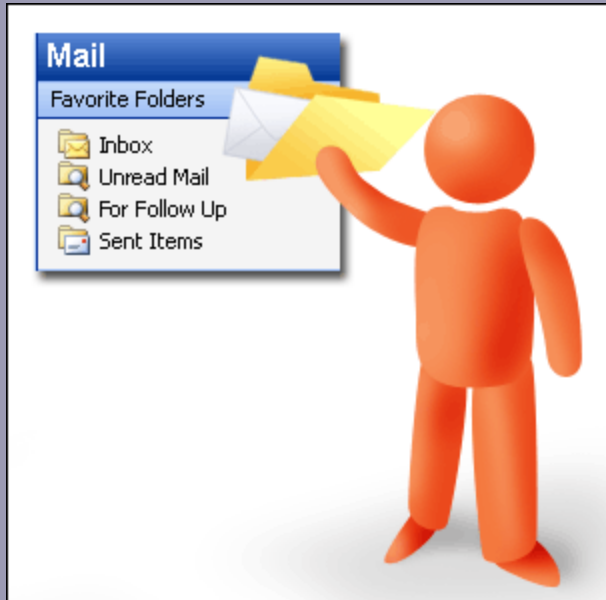
All folders in your mailbox.

If you want to narrow the scope, you can create customized Search Folders.

Lesson 5

Play favourites

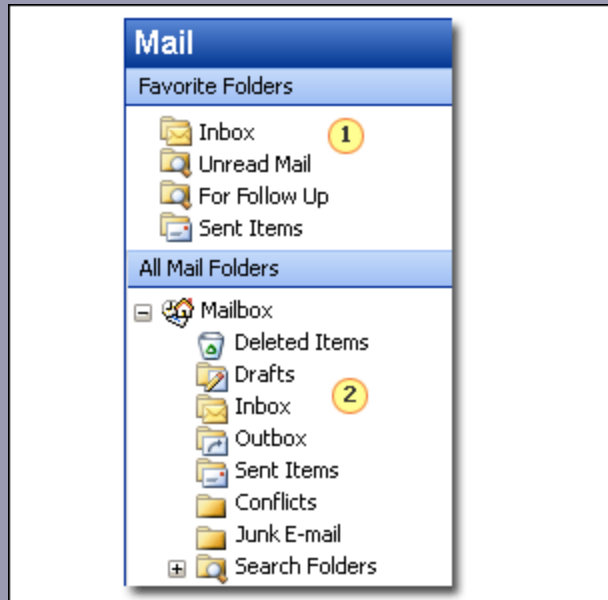
Play favorites



Adding a folder to Favourite Folders makes it easy to access.

Organize your Inbox

See favorites



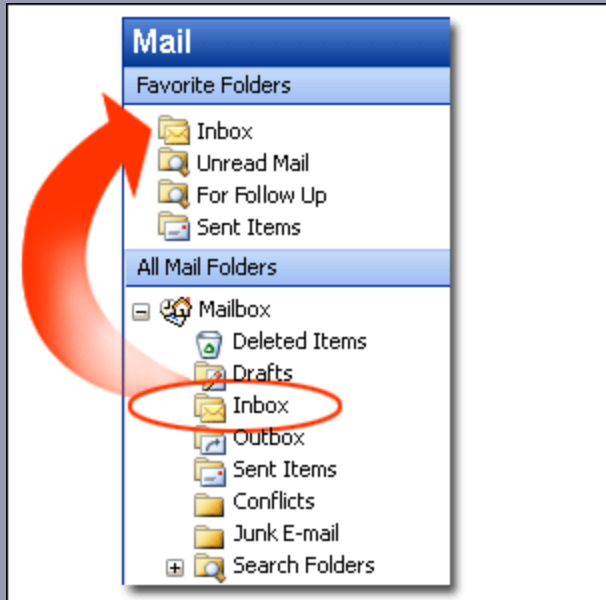
You see mail folders when you look at e-mail in the Navigation Pane.

Mail folders are visible in two places:

1. Favourite Folders
2. All Mail Folders

Organize your Inbox

Make a folder a favorite



Once you've set up folders, you may want to add them to the Favourite Folders section of the Navigation Pane.

- To do this, simply drag the folder that you want to make a favourite into that pane.
- To remove it, right-click the folder in **Favourite Folders**, and then click **Remove from Favourite Folders**.

Suggestions for practice

1. Add a folder to Favourite Folders by dragging.
2. Add a folder to Favourite Folders by right-clicking.
3. Remove a folder from Favourite Folders.

Test 5, question 1

**To place a folder in Favorite Folders, you would:
(Pick one answer.)**

1. Drag it.
2. Cut and paste it.
3. Move it by using Microsoft Windows[®] Explorer.

Test 5, question 1: Answer

Drag it.

Organize your Inbox

Test 5, question 2

To remove a folder from the **Favorite Folders** list only, you would:
(Pick one answer.)

1. Delete it.
2. Use the **Remove from Favorite Folders** command.
3. Drag it.

Test 5, question 2: Answer

Use the **Remove from Favourite Folders** command.

Right-click the folder in **Favourite Folders**, and then click **Remove from Favourite Folders**. What could be more simple?