

# Outlook 2002 Training Outline

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## Outlook Screen Elements

- Inbox vs. Outlook Today
- Outlook Bar / Folder List
- Preview Pane / Auto-Preview
- Mark Items as Read when selection moves
- Notify Dialog Box, Notify Tray Icon, Notify Sound

## Email

- Message Format (MS-Word as Editor??)
- Reply / Reply-All / Forward
- Options (Read Receipt, Importance, Polling Questions)
- Attachments
- Drafts
- Flag Message for Follow-up
- BCC
- Auto-Correction Rules / Automatic Spell-Check
- Creating / Editing Signatures

## Folders

- Creating Folders
- Checking on Size of Folder's Contents
- Add Hotmail or any other Web Based Email service to Folder List

## Contacts

- Views (Phone List, Address Cards)
- Categories (Show categories in Palm)
- Adding a Contact
- Adding a Contact from Same Company
- Contact Reminders
- Looking up a Contact
- Sharing Contacts
- Distribution Lists
- Easily Addressing Mail (Auto-Complete vs. Auto-Resolution)
- Changing Lookup Order when addressing Mail: *1. Contacts, 2. G.A.L.*
- Setting default Area Code (Control Panel, Modems/Telephony)

## Calendar

- Views
- Appointments / Events / Meetings
- Recurring Events
- Responding to Meeting Requests
- Categories and Labels

## Tasks

- Creating New Tasks
- Assigning & Accepting Tasks
- Start Date

- Regenerating Tasks

## Notes

- Copying to Desktop
- Turning Notes into E-Mail Messages
- Categorizing Notes
- Assigning a Delegate
- Granting Permissions to Inbox, Calendar, Tasks, Contacts, other folders...

## Extras

- Drag Message to Calendar
- Drag Message to Tasks
- Drag Note to Inbox
- Drag Contact(s) to Inbox
- Insert vCard
- Insert Item Contact as Attachment
- Insert Item Contact as TEXT
- Insert Item Calendar item

## Suggested Settings / Options

- Start up in Outlook Today or Inbox?
- Do not use MS-Word as a Mail editor
- Turn off "Show Recently Used Commands First" on menu bar
- Turn off: Standard and Formatting Toolbars share one row
- Resize and position Message windows so they don't block Folder List
- Turn on BCC field in new message window
- Turn on FROM field for Delegates
- Change Lookup Order when addressing mail.
- Display Notification Dialog Box? (Usually this is a user-choice)
- Tip: Add attorney's Inbox Folder to Secretary's Outlook Today view.
- Add columns to message windows as needed and set alignment; (e.g. Size of messages)
- Paste URL Shortcut as Text
- Palm Sync - "invasion" dialog box (OXP)

## Cool stuff

- Mapping a Contact
- Mailbox Cleanup Feature
- Rules:
  - Organize messages by color, based on a number of factors
  - Move messages to particular folders
  - Automatically forward messages based on content or sender
  - Drag items from module to module.
  - Drag Email to Calendar to turn into an Appointment or Event
  - Drag Email to Tasks to turn into a Task
  - Drag Note to Inbox to turn into an Email message
  - Drag Contact(s) to Inbox to address mail to those contacts
  - Drag Note to Inbox to turn into an Email message
- Calendar Tips
  - Press Alt+3 to see next three days, Alt+5 to view next five days and so on.
  - View nonconsecutive days – for example, the next five Mondays. (To do so, open the first day in Day view. Then, while holding Ctrl key, click the next day you'd like to view simultaneously on the tiny preview calendar.