

# Microsoft Outlook 2003 Cheat Sheet

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## Before you start, configure Microsoft Outlook

1. Click *Start > Programs > Microsoft Office > Microsoft Office Outlook 2003*
2. Click *Next (Start Screen)*
3. Select *Do Not Upgrade > Next*
4. Select *Yes (configure email account) > Next*
5. Select *Microsoft Exchange Server > Next*
6. -If your last name begins with A-K, type **MAIL01**, if L-Z type **MAIL02** in the *Exchange Server name*.  
Check *Use Cached Exchange Mode*.  
Type your computer login name in *Username* field. Click *Check Name (should become underlined)*. Click *Next*.
7. Click *Finish*. Type name & initials.

## Configure Outlook Workspace

1. *View > Navigation Pane*
2. *View > Reading Pane > Right*
3. *View > Toolbars > Standard*



## Create a Signature

1. Click *Tools > Options*
2. Click *Mail Format Tab > Signatures*
3. Click *New > Give your signature a name like "main" > Start with a blank signature > Next*.
4. Type your signature > *Finish > OK*.
5. Make sure the signature that you just created appears in the *Signatures for new messages* and *Signatures for replies and forwards > OK*.

## Send a Message

1. Click the **New** button on the tool bar.
2. -Type the address (include @psdschools.org). As you type, Auto complete may suggest a name. If so, press enter when the correct name appears. **Use a semicolon between addresses!**  
-OR click the **To...** button and search for a name in the directory. Select the name > Click *To:* > Click *OK*.
3. Type a descriptive subject and message.
4. Optional. To add an attachment, click the button. Browse for the file and then click *insert*.
5. Optional. Set the message importance or flag the message with a due date and time, by clicking on one of the following buttons .
6. For advanced options, click the **Options...** button.
7. Click the **Send** button.

## Reading Messages

1. Click on the message. It will appear in the reading pane.

2. Optional, click the **Reply** **Reply to All** **Forward** button.
3. To open attachments, double click on the attachment's **Breakfast** icon. Click *Open*. To save an attachment, right click on the attachment and then select *save as*. Select a location and then click *Save*.
4. To print a message, click on the button.
5. To delete a message, click on the button.

## Managing Messages with Folders

1. Create a folder by right clicking on your *Mail Box*, *Personal Folders*, or *Archive Folders* and then select **New Folder**.
2. Name the folder and then click *OK*.
3. Drag and drop email messages from your inbox to the new folder.
4. To delete a folder, right click on the folder and then select *delete folder*.

## Searching for Email and Using Search Folders

1. Click on the desired folder and then click on the **Find** button. (Click **Clear** when finished.)
2. Type in the criteria and click on *find now*.  
**Look for:** judym **Search In:** Inbox **Find Now**
3. Optional. To save the search results. Click on the **Options** button and then click *Save Search as Search Folder*.
4. Name the search and click *OK*.
5. The search will be saved in your search folder **Search Folders**. You will have to click the + sign to open the folder **judym (10)**.

## Creating Rules for Folders

1. Right click on an email from a certain person or with a certain subject line. Click on **Create Rule**.
2. Select the condition/conditions. Check the appropriate "Do the following."  
 **Move e-mail to folder:** **InstructionalTechnolg** **Select Folder...**  
More than likely, you'll select a folder. Click *OK*. Decide whether or not you want to run the rule on your entire inbox. Click *OK*.

## Using Flags and Reminders.











1. Right click on the next to the desired email.
2. Mark the email with a colored flag **Red Flag** and add a reminder (optional).
3. Once finished with the email, delete it or right click on the flag again and select *Flag complete*.
4. Find emails w/ flags in *Search Folders*  
 **Search Folders**  
 **For Follow Up [5]**

## Color Coding Email.







1. Click on *Tools > Organize*.

2. Click on  Using Colors.
3. Set up the criteria. Click Apply Color.  
Color messages | from  |brad@psdschools.org | in 

### Adding and Managing Contacts

1. Click the  **Contacts** button in the navigation pane.
2. Click the  **New** contacts button.
3. Type the contact's full name and email address OR look up address w/  button. Then click the  **Save and Close** button OR click the *save and new*  button.
4. To use contacts, return to  **Mail** in navigation pane. Compose a new email message. Click the  **To...** button. Change the drop-down-menu to . Select the desired contact, click **To ->**, and then click OK.
5. Optional. To view your contacts, click on the  **Contacts** button in the navigation pane. To send an email to a contact in this view, click on the person's name and then click on the *New message to contact*  button.



### Making a distribution list

1. Click the  **Contacts** button in the navigation pane.
2. Click the triangle to the right of *New*. 
3. Click the  **Distribution List** menu.
4. Give the distribution list a name and then click the  **Select Members...** OR  **Add New...** button.  
If selecting members, select the person from the PSD global address book or your contacts. If adding new members, type the person's full name and email address. Click *OK*.
5. Click the  **Save and Close** button. Send to your distribution list exactly like you send to a contact. View your list (expand) by clicking on the plus sign next to the list.

### Save Messages (not attachments)

1. Return to Email. To save an important message, click File>Save As. Give the message a name, select a location, and select a file type (html, text).

### Archive Messages

1. Tools>Options>Other tab>AutoArchive button.
2. Check to make sure the defaults are acceptable. Click the  **Apply these settings to all folders now** button and then click OK.
3. Auto Archive will run on the specified time frame. Old messages will be archived in a folder with the same name, in the  **Archive Folders** folder.  
Note: Old email copied from Simeon will not be archived for six months from the time your

account is migrated because it got a new "modified" date on the day it was moved.

4. To set up specific archive rules for a specific folder, right click on the folder and then select *properties>auto archive tab>change any settings>click OK*.






### Web Outlook Access

1. Open your browser and visit <http://www.psdschools.org/mail/> click new Outlook.
2. Type your PC login name and password.
3. OWA is similar to your locally installed Outlook. Things you can't do with OWA include: 1) Can't sync to handheld computer. 2) Can't share folders, contacts, or calendars. 3) Can't save emails easily.





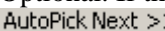





### Out of Office Assistant

1. Click on *Tools>Out of Office Assistant*.
2. Mark "I am currently out of the office." Type the auto-reply message and click *OK*. Note: If you need messages forwarded, you can click the create rule button and set up more advanced features.

### Making Appointments

1. Click on the  **Calendar** button in the navigation pane. Click on the desired calendar view .
2. Click on the  **New** appointment button OR double click on the date of the appointment in the yellow calendar area.
3. Give the appointment a subject and location. Give the appointment a start date and time & a end date and time (Note: use the drop down arrows to view a calendar and times).
4. Optional. If this is a recurring event, click the  **Recurrence...** button and set the recurring dates.
5. If finished, click the  **Save and Close** button.

### Scheduling Meetings

1. Repeat the steps above to make an appointment or a meeting.
2. Select the  **Scheduling** tab.
3. Type the person's email prefix into the  field OR click the  **Add Others** from address book button and add the desired people to the required field. Add as many people as desired.
4. The person's name and availability will appear .
5. Optional. If the person is busy, click the  **AutoPick Next >>** button. It will pick the next available time the person is available.
6. Finally, click the  **Send** button. The person will receive an email with the following line:  
 Accept |  Tentative |  Decline |  Propose New Time