

Jim Boyce

*Expert author and former contributing editor
to Windows Magazine*

Microsoft

Microsoft® **Outlook®**

Version 2002

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Microsoft Office XP Application

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sample code,
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Frequently Asked Questions

1. What is the new Outlook unified mode, and what happened to Internet Only and Corporate/Workgroup modes? Ch 1, Ch 2
2. How do I use multiple accounts in Outlook to organize my work and personal data? Ch 2
3. How can I test an account to make sure it's configured properly? Ch 2
4. How do I create a custom view in Outlook? Ch 3, Ch 24
5. How can I access my Inbox through a Web browser? Ch 3, Ch 36
6. What's the best way to organize items in Outlook? Ch 4
7. I want to broadcast a message to multiple people but don't want any of them to know who else is receiving the message. How do I do that? Ch 5, Ch 7
8. Can I use Outlook with Hotmail, CompuServe, or other e-mail services? Ch 6
9. How can I prove to recipients that I sent a message? Ch 7, Ch 12
10. How do I create message rules to automatically process messages? Ch 8
11. How can I generate automatic responses to messages? Ch 8
12. How can I encrypt sensitive messages for security? Ch 12
13. What are send/receive groups, and how do I use them to send and receive messages? Ch 13
14. How is scheduling improved in Outlook 2002? Ch 18, Ch 19
15. Can I integrate Outlook and Microsoft Project to do advanced scheduling? Ch 21
16. How do I set up a message board with public folders or the NNTP service? Ch 34
17. Help! I need to recall a message I've sent before it is read. Ch 33
18. How do I configure Outlook Web Access on Exchange Server to allow users to access their mailboxes through the Web? Ch 36
19. How do I change the way Outlook handles blocked attachments? Ch 39
20. How can I create custom forms and applications for Outlook? Ch 40, Ch 41



The CD that helps you put your software to work!

Dig in—for the work-ready tools and resources that help you go way beyond just using Outlook. You'll conquer it! Just like the INSIDE OUT book, we've designed your INSIDE OUT CD to be both comprehensive and supremely easy to use. All the tools, utilities, and add-ins have been tested against final Outlook Version 2002 code—not beta. The sample chapters from other INSIDE OUT books help take your Office XP learning experience even deeper. You get essential links to online software updates, product support, and more—direct from the Microsoft Office team. And with the CD's intuitive HTML interface, you'll always know exactly where you are and what else you can do!



Your Inside Out CD features:

- Microsoft and Third-Party Add-Ins—must-have tools, utilities, demos, and trial software
- Office Tools on the Web—complete descriptions and links to official Microsoft Office resources on line
- Author Extras—sample code to help build your own applications using Microsoft Visual Basic® for Applications (VBA)
- More INSIDE OUT Books—sample chapters from other INSIDE OUT Office XP books
- Complete Microsoft Press® eBook—the entire MICROSOFT OUTLOOK VERSION 2002 INSIDE OUT book in easy-search electronic format
- Step by Step Interactive Tutorials—trial version of official Microsoft interactive training for Office XP

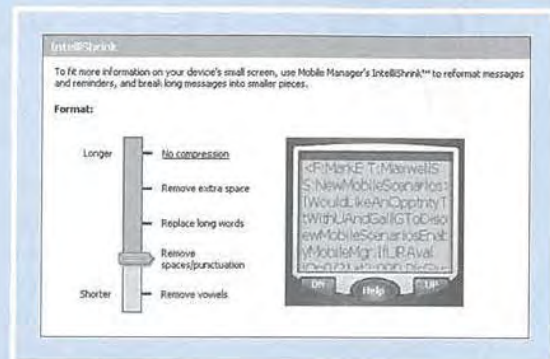
Want to learn more? Read on for full details, including System Requirements (last page of this section).

Microsoft Add-Ins

Get Microsoft add-ins and tools for Outlook—straight from the source.

Includes:

- **Microsoft Outlook Mobile Manager**—install this cutting-edge add-in on your desktop PC and receive e-mail, calendar, and reminders on a whole range of mobile devices—so you get the information you need no matter where you go!



- **Microsoft Office Internet Free/Busy Service**—publish the blocks of time when you are free and busy to a shared Internet location, so people who don't normally have access to your Outlook calendar can check your schedule on the Web
- **Microsoft Visual Keyboard**—type in multiple languages on the same computer by using an on-screen keyboard for other languages
- **Microsoft Visio® Auto-Demos**—use these customizable auto-demos to see how to put Visio diagramming software to work on your next project
- **Step by Step Interactive Tutorials**—try official Microsoft interactive training for Office XP, and teach yourself common tasks and key features and functions



Microsoft Outlook Version 2002 INSIDE OUT

Third-Party Utilities, Demos, and Trials

All the third-party add-ins on this CD have been tested for use with Outlook Version 2002. In this section, you'll find all the details you need about each tool—including a full description, application size, system requirements, and installation instructions.

Includes:

- **Nereosoft ProWrite™**—use existing information from the contact manager to create new e-mail and letter merges, faxes, memos, labels, and envelopes in a flash
- **Caelo Software Nelson Email Organizer**—with full send/receive capability, this tool automatically organizes your e-mail into easy-to-access views by correspondent, date, mailing list, attachments, and more
- **MileHi Software TimeCards for Outlook**—streamline the creation and management of linked Outlook items, including journal entries, tasks, appointments, and notes
- **Micro Eye ZipOut**—automatically compresses attachments to outgoing messages and items stored in your mailbox or personal folders, speeding message transfer and freeing disk space
- **Mark Wilson Classify for Outlook™**—easily add a classification label to e-mail containing sensitive or classified information to help ensure proper security handling



Office Tools on the Web

Here you'll find ready links to the most helpful and informative online resources for Office XP, direct from Microsoft. Find out exactly how each site can help you get your work done—then click and go!

Office Assistance Center

Get help using Office products with articles, tips, and monthly spotlights. Learn more about working with documents, data, and graphics; using e-mail and collaboration features; creating presentations and Web pages; and using everyday time-savers.

Office eServices

Use these Web services to get the most from Office. Learn how to store and share files on the Web; build and host Web sites; find communication services, language translation, learning and reference, and online postage resources; tune up your computer; and much more!

Office Product Updates

Obtain recommended and critical updates to enhance your Office XP experience.

Office Download Center

Download updates, add-ins, viewers, and more from the Office Download Center. Use the online search tool to find the utilities to help you work faster and smarter.

Design Gallery Live

Pick out clip art or photos for your Office project from this huge royalty-free selection. New items are constantly added to meet your needs. The advanced search facility makes finding the right artwork quick and easy.

Microsoft Office Template Gallery

Instead of starting from scratch, download a template from Template Gallery. From calendars to business cards, marketing material, and legal documents, Template Gallery offers hundreds of professionally authored and formatted documents for Microsoft Office.

Online Troubleshooters

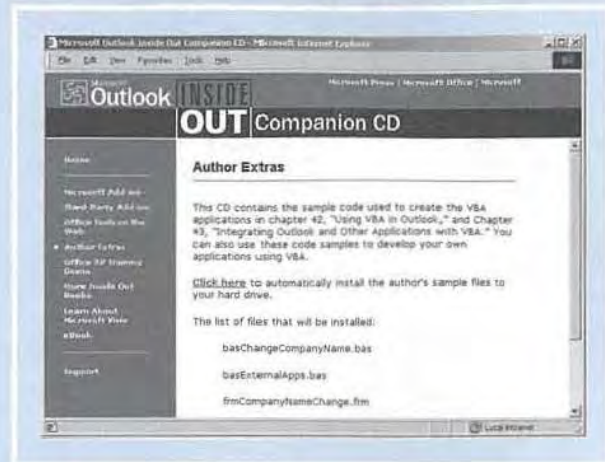
Microsoft has developed Office XP online troubleshooters to help you solve problems on the fly. Access them using the links on the CD—and get the diagnostic and problem-solving information you need.





Author Extras

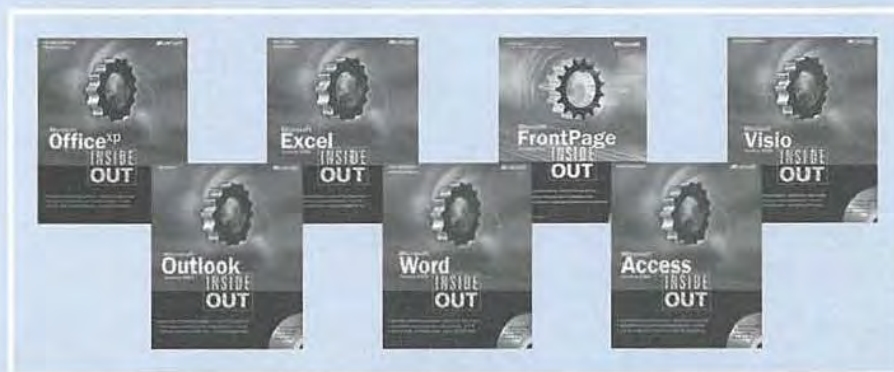
Here's where your INSIDE OUT author went the extra mile—great sample code for you to take apart and study! In this section of the CD, you'll find the code used to create the VBA applications in Chapter 42, "Using VBA in Outlook," and Chapter 43, "Integrating Outlook and Other Applications with VBA." Make the examples from inside the book come to life—and use the code to develop your own applications faster.



More Inside Out Books

The INSIDE OUT series from Microsoft Press delivers comprehensive reference on the Office XP suite of applications. On this CD, you'll find sample chapters from the companion titles listed below, along with details about the entire line of books:

- Microsoft FrontPage® Version 2002 Inside Out
- Microsoft Office XP Inside Out
- Microsoft Excel Version 2002 Inside Out
- Microsoft Word Version 2002 Inside Out
- Microsoft Visio Version 2002 Inside Out





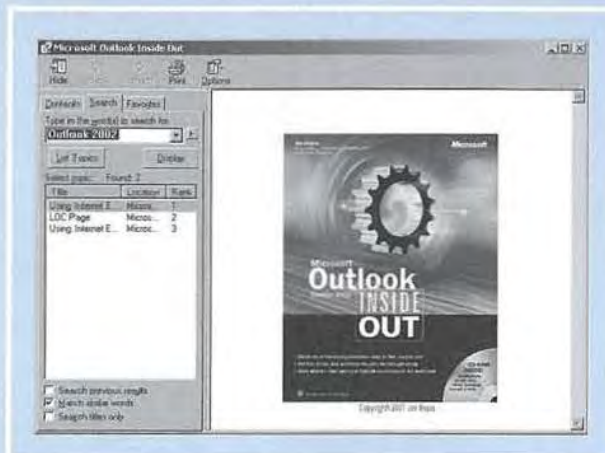
Microsoft Outlook Version 2002 INSIDE OUT

Complete Microsoft Press eBook

You get the entire MICROSOFT OUTLOOK VERSION 2002 INSIDE OUT book on CD—along with sample chapters from other INSIDE OUT books—as searchable electronic books. These Microsoft Press eBooks install quickly and easily on your computer (see System Requirements for details) and enable rapid full-text search.

Features:

- Super-fast HTML full-text search
- Full-size graphics and screen shots
- Copy, paste, and *print* functions
- Bookmarking capabilities
- A saved history of every file viewed during a session



CD Minimum System Requirements

- Microsoft Windows® 95 or higher operating system (including Windows 98, Windows Millennium Edition, Windows NT® 4.0 with Service Pack 3, Windows 2000, or Windows XP)
- 266-MHz or higher Pentium-compatible CPU
- 64 megabytes (MB) RAM
- 8X CD-ROM drive or faster
- 46 MB of free hard disk space (to install the eBook and interactive tutorials)
- 800 x 600 with high color (16-bit) display settings
- Microsoft Windows-compatible sound card and speakers
- Microsoft Internet Explorer 4.01 or higher
- Microsoft Mouse or compatible pointing device

NOTE

System Requirements may be higher for the add-ins available on the CD. Individual add-in system requirements are specified on the CD. An Internet connection is necessary to access the hyperlinks in the Office Tools on the Web section. Connect time charges may apply.

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- Get tips, tricks, and workarounds, plus the straight scoop
- Work smarter—and take your Outlook experience to the next level

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To David, a perfect little grandson

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Introduction

Ten years ago the average computer user spent most of his or her time using a productivity application such as Microsoft Word or Microsoft Excel. In the ensuing decade, users have become more sophisticated, network implementations have become the rule rather than the exception, and collaboration has become a key facet of a successful business strategy. Perhaps the most significant change of all has been the explosive growth of the Internet. All these factors have led to a subtle but significant shift in the way people work. Today most users of Microsoft Office spend a majority of their time in Microsoft Outlook. That change alone signifies a shift toward information management as an increasingly important everyday task. Getting a handle on daily information management can be critical to your productivity, success, and sanity.

Outlook is an extremely versatile program. Most of the other applications in the Office suite have a fairly specific purpose. Outlook, however, serves as personal information manager (PIM), e-mail application, fax machine, task manager, and much more. With so much power and flexibility at your fingertips, you need to have a good understanding of Outlook's features. Understanding the ins and outs will not only help you get the most from this program but will also have a positive impact on your workday.

Who This Book Is For

Understanding all of Outlook's features and putting them to work is the focus of *Microsoft Outlook Version 2002 Inside Out*. Most Outlook books act mainly as how-to guides for users who want to learn about the software. This approach leaves out work-group managers and administrators when it comes to deployment, collaboration, server-side issues, and administration. *Microsoft Outlook Version 2002 Inside Out* offers a comprehensive look at the features most people will use in Outlook and serves as an excellent reference for users who need to understand how to accomplish what they need to do. In addition, this book goes a step or two further, providing useful information to advanced users and IT professionals who need to understand the bigger picture. Whether you want to learn Outlook for your own use, need to support Outlook on a peer-to-peer network, or are in charge of supporting Outlook under Microsoft Exchange Server, you'll find the information and answers you need between the covers of *Microsoft Outlook Version 2002 Inside Out*.

This book makes some assumptions about the reader. You should be familiar with your client operating system, whether it's Microsoft Windows 9x, Windows Me, Windows NT, or Windows 2000. You should be comfortable working with a computer and have a good understanding of how to work with menus, dialog boxes, and other aspects of the user interface. In short, *Microsoft Outlook Version 2002 Inside Out* assumes you're an experienced computer user who might or might not have an understanding of Outlook and what it can do. The purpose of this book is to give you a comprehensive look at

what Outlook can do, how to put Outlook to work, and how to manage Outlook at the user, workgroup, and server levels.

How This Book Is Organized

Microsoft Outlook Version 2002 Inside Out offers a structured, logical approach to all aspects of using and managing Outlook. Each of the nine parts of the book focuses on a specific aspect of Outlook use or management.

Part 1—Working with Outlook

Part 1 starts with the basics. Chapter 1 takes a look at Outlook's architecture, setup, and startup options to help you understand how Outlook stores its data. In Chapter 2 you'll learn how to perform advanced setup and configuration tasks such as setting up e-mail accounts, using profiles, making Outlook work with other e-mail services, configuring receipt and delivery options, and using add-ins that extend Outlook's functionality. Chapter 3 gets you up to speed using Outlook to send and receive messages, manage your workday, locate information on the Internet, and perform other common tasks. Chapter 4 rounds out Part 1 with a detailed look at how you can use categories and types to organize your data in Outlook.

Part 2—Messaging

Part 2 delves deeper into Outlook's e-mail and fax messaging components and features. In Chapter 5 you'll learn how to manage address books and distribution lists. Chapter 6 explains how to send and receive Internet-based messages through Outlook. Chapter 7 will make you comfortable with the range of features Outlook has for creating messages both simple and complex. In Chapter 8 you'll learn how to organize your messages, apply filters and rules to process messages automatically, exclude junk and spam e-mail senders, and generate automatic responses to incoming messages. Chapter 9 gives you a detailed look at Outlook's capabilities for sending and receiving faxes. Because Outlook isn't the only option available for messaging, in Chapter 10 you'll also learn how to integrate Outlook with Outlook Express and move messages, accounts, and addresses between the two applications.

Outlook relies on Outlook Express as its default newsgroup reader, so you'll learn in Chapter 11 how to send, receive, and manage newsgroup messages with Outlook Express. Because security is an increasingly important topic, Chapter 12 will help you secure your system and your data, send messages securely, and prevent others from impersonating you to send messages. Chapter 13 offers a comprehensive look at how Outlook's Remote Mail features can be indispensable for managing your mail online and offline.

Part 3—Contact Management

Part 3 explores Outlook's features for managing your contacts. Chapter 14 starts with a look at how to manage contact information, including addresses, phone numbers, e-mail addresses, fax numbers, and a wealth of other information. You'll also learn how to sort, filter, and categorize your contacts, as well as share contact data with others. Chapter 15 provides a look at Lightweight Directory Access Protocol (LDAP) directory services. You'll learn how to use Outlook to query an LDAP service to obtain addresses and other information about contacts and other objects in the directory.

Chapter 16 takes a look at Notes, a useful feature in Outlook that will help you get rid of those little slips of paper cluttering your desk and the sticky notes taking over your monitor. You'll learn how to create notes, assign categories to them, change their color, move them to other applications, put them on your desktop, and much more. Chapter 17 completes Part 3 with a look at journaling, an important feature in Outlook that allows you to keep track of time spent on projects and documents and to track contacts and other items of interest.

Part 4—Scheduling

Part 4 covers scheduling, one of the most widely used features in Outlook. Chapter 18 provides an in-depth look at Outlook's appointment-scheduling capabilities. You'll learn how scheduling works, and how to schedule appointments, create recurring appointments, use color effectively to manage your schedule, allow others to access your schedule, and publish your schedule to the Web. Chapter 19 takes a look at scheduling meetings and resources using Outlook and explains the subtle differences between scheduling appointments and scheduling meetings. Chapter 20 examines all aspects of managing tasks with Outlook. You can use the Outlook Tasks folder to keep track of your own tasks as well as assign tasks to others. Integrating your tasks in Outlook can help you ensure that your tasks get done on time and are allocated to the appropriate person to complete them. Chapter 21 rounds out the coverage of scheduling with a look at integrating Outlook with another scheduling and time-management application from Microsoft called Microsoft Project. You should turn to Microsoft Project when you need advanced project scheduling features. Understanding how to integrate Outlook with Project will help you provide a seamless transition between the two.

Part 5—Customizing Outlook

Customizing an application or the user interface for your operating system isn't just a matter of picking and choosing your personal preferences. Your ability to customize the way an application functions or appears can have a profound impact on its usefulness to you and to others. In short, the ability to customize an application allows you to make that application do what you want it to do in the way that makes the most sense to you. Chapter 22 starts the coverage of customization with a look at templates and how they can simplify the creation of e-mail messages, appointments, events, and

other Outlook objects. You'll learn not only how to create and edit templates, but also how to share those templates with others.

Chapter 23 provides the detailed information you need to customize the Outlook Bar, the toolbar that appears by default to the left of the Outlook window and gives you quick access to Outlook's components. Chapter 24 will help you customize the other aspects of the Outlook interface including command bars, the Outlook Today view, folders, and print styles for organizing and displaying your Outlook data. Chapter 25 gives you a look at a host of ways you can automate tasks in Outlook.

Part 6—Managing Outlook

Part 6 begins the transition from user-focused topics to more advanced topics of interest to administrators and IT professionals. In Chapter 26 you'll learn how to integrate Outlook with other Office applications, such as performing a mail merge in Microsoft Word based on contacts stored in Outlook or moving contact data between Outlook and Microsoft Access. Chapter 27 will help you simplify your life by teaching you how to delegate many of your responsibilities—including managing your schedule—to an assistant. In Chapter 28 you'll learn how Outlook uses folders to store your data and how to manage those folders. Chapter 28 also offers in-depth coverage of how to organize and archive your important data. Chapter 29 extends the look at data management with an examination of how to find and organize data in Outlook. Chapter 30 concludes the discussion of management topics with a look at some important issues: backing up your data, exporting data, and importing data from other sources into Outlook.

Part 7—Using and Administering Outlook with Exchange Server

Outlook can be an effective information management tool by all by itself, whether you use it on a standalone computer or on a network in collaboration with other users. Where Outlook really shines, however, is in its integration with and as a client for Microsoft Exchange Server. Part 7 steps up to a more advanced level to explain a broad range of Outlook/Exchange integration topics. Chapter 31 begins the coverage with an overview of Exchange Server and how to set it up. Chapter 32 turns the focus to the client, explaining how to configure Outlook as an Exchange Server client. Chapter 33 explores the wealth of features in Outlook specifically geared toward messaging with Exchange Server, such as the ability to recall sent messages before they are read, prioritize messages, and much more. This chapter also contains a detailed look at voting, an interesting feature in Outlook. You can use Outlook as a tool to solicit input from others on any issue or topic, receiving and tallying their votes quite easily. Chapter 33 explains how voting works and covers all the topics you'll need to implement voting effectively.

Life isn't just about working in the confines of your office, and Part 7 takes that into account. Chapter 34 takes a detailed look at features in Outlook and Exchange Server that allow you to share data with others, including how to set up and use public folders,

Introduction

share personal folders, set up a message board, manage public folders, and even use the Network News Transfer Protocol (NNTP) service included with Windows 2000 Server to set up a newsgroup server for intranet or Internet users. Chapter 35 helps you continue working when you're away from the office or when your server is offline, covering how to use remote features to access and manage your Outlook data. Chapter 36 takes remote access one step further, explaining how to configure Exchange Server to allow users to access their data through a Web browser and offers tips on security, site considerations, and other important issues. Chapter 37 offers information and support for network, platform, and deployment considerations. Chapter 38 is targeted to anyone who needs to support Outlook clients under Exchange Server, including coverage of client options, mailbox management, configuring alternate recipients, message forwarding, and message journaling (archival). This chapter also includes topics that will help you to support collaboration and group scheduling. Chapter 39 completes the discussion of Exchange Server with an examination of backup strategies and virus protection. The chapter not only covers the importance of a sound backup and recovery strategy but will also help you develop and implement your own strategy that takes into account the unique requirements of Outlook and Exchange Server. For example, you learn how to structure an Exchange 2000 Server into multiple message stores for fault tolerance and quicker backup and restore. Chapter 39 also includes a detailed analysis of the importance of virus protection and how to guard against virus infections and outbreaks. You'll read about both client-side and server-side solutions, covering a range of platforms in addition to Exchange Server 5.5 and 2000. And since up-to-date virus definitions are the key to successful prevention, Chapter 39 also takes a close look at developing a virus definition update strategy. You'll also find a detailed discussion of how to configure attachment blocking at the server as well as in Outlook itself.

Part 8—Developing Custom Forms and Applications

The Microsoft Office suite offers an impressive ability to customize and integrate applications, and Outlook is no exception. Whether you need to create a few custom forms or develop full-blown interactive applications with Outlook and other Office applications, Part 8 provides the solutions you need.

Chapter 40 begins the discussion with a look at creating and using custom forms for a variety of tasks. In Chapter 41 you'll begin to delve into Outlook programming with a look at programming forms using Visual Basic Scripting (VBS). Chapter 42 continues the coverage of programming and development with a look at using Visual Basic for Applications (VBA) to develop Outlook applications. Chapter 43 completes the discussion with a detailed look at integrating Outlook and other applications through VBA.

Part 9—Appendixes

Microsoft Outlook Version 2002 Inside Out includes eight appendixes. The topics covered range from installing and updating Outlook to other sources of information, such

as the Office XP Resource Kit and the Outlook Deployment Kit. You'll also find background data such as registry keys, add-ins, symbols, and shortcuts.

See the section "Conventions and Features Used in This Book" (page li) for a list of some of the features you will find used throughout the book.

What's New in Outlook 2002

The first step to getting a handle on Outlook is to understand what it can do. Chances are you're familiar with Outlook or with similar programs. Throughout *Microsoft Outlook Version 2002 Inside Out* you'll find information on Outlook's features. Whether or not you're experienced with a previous version of Outlook, the following section will bring you up to speed on the new features in Outlook 2002.

Core Product Enhancements

Outlook 2002 provides several key enhancements to the core Outlook components to improve ease-of-use, offline and remote use, synchronization, and more. These core enhancements include:

- **E-Mail Accounts Wizard.** In previous versions of Outlook, adding e-mail accounts wasn't an intuitive process and could be difficult for inexperienced users. Outlook 2002 provides a new E-Mail Accounts Wizard to simplify the process of setting up accounts, adding information stores and address books, and configuring account options. The wizard has a feature that allows you to test an account as you're creating it to ensure that the settings are correct.
- **Unified Reminders Window.** In previous versions of Outlook you had to process reminders one at a time. If you'd been out of the office for a while, you could have dozens of reminders to deal with upon your return. Outlook 2002 provides a unified reminders window that presents all reminders in a single interface, making it much easier to dismiss or snooze groups of reminders.
- **Improved preview pane.** The preview pane lets you preview messages and appointments without opening them. In Outlook 2002 the preview pane adds new functionality. You can double-click addresses in the preview pane header to view address properties. The InfoBar is now available in the preview pane, and the pane offers a new area for displaying attachments. You can also accept or decline meeting requests through the preview pane without opening them.
- **Smart tags.** One of the new features in the Office XP suite is smart tags, which offer quick access to item-specific features right where the

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data appears. Paste some text from the Clipboard, for example, and a smart tag appears beside the text. Click the tag and select different paste formats and other options that change the pasted content. AutoCorrect entries are another example of where smart tags shine. If you type some text referenced by an AutoCorrect entry, Office changes the text automatically but adds a smart tag beside the modified text so that you can select other changes or undo the correction.

Messaging

Messaging is a big part of Outlook's functionality, and Microsoft has improved messaging in several significant ways. These changes and new features include the following:

- **Outlook Unified Mode.** Outlook no longer uses Internet Mail Only (IMO) and Corporate Workgroup (C/W) modes for e-mail. All modes are merged into a single Unified Mode that allows you to access Exchange Server, POP3, IMAP, and Hotmail/HTML accounts without switching profiles. This is a significant improvement in usability.
- **Word as the default e-mail editor.** Word is now the default e-mail editor, which allows you to take advantage of the editing and rich text features in Word when you create e-mail. As in previous versions, you can make Outlook the default e-mail editor if you prefer. Outlook also offers improvements for creating and editing messages and provides a consistent interface for message creation regardless of which e-mail editor you choose.
- **HTML as the default protocol.** Outlook uses HTML as the default protocol for message content, extending the capabilities for creating rich content in messages. If you prefer, you can configure Outlook to use text-only as the default protocol for compatibility.
- **Hotmail support.** Through integrated support for Hotmail, Outlook 2002 allows you to send and receive e-mail messages through your Hotmail account and work with them offline.
- **Autocomplete for addresses.** With either Outlook or Word as your e-mail editor, Outlook 2002 automatically completes addresses as you type them in the To, Cc, and Bcc fields.
- **Virus detection and prevention.** Outlook 2002 includes security features that prevent you from opening or sending attachments that contain viruses. Outlook also prevents external scripts from gathering e-mail addresses from your system or silently sending e-mail, thereby helping to control and prevent viruses and worms from spreading through your e-mail system.

Calendar

The Calendar is an important component in Outlook, and Microsoft has implemented two main changes to the Calendar to improve usability and functionality:

- **Calendar coloring.** You can label individual and recurring appointments with one of 10 predefined colors, each of which has a corresponding label (Personal, Business, Urgent, and so on). You can modify these labels to suit your needs. Each appointment can have only one label, but you can use exceptions to apply a color to individual appointments in a series that is different from the default color of the series. Outlook also allows you to use rules to automatically color appointments that meet the same criteria. For example, you might apply a specific color to all meeting requests from a particular person.
- **Meeting planner enhancements.** You can now propose a new time for a meeting at the same time that you tentatively accept or decline a meeting request. The person who proposes the meeting can view all counterproposals in the scheduler and decide which counterproposal to use. Group scheduling allows you to view the schedules of multiple people in a single calendar that contains a graph of when each user is free or busy. The unified calendar also displays details about the users' appointments (unless they have been marked as private). Another usability improvement is that when you hover the pointer over an appointment, a pop-up window displays the appointment details. If you hover the pointer over a selection of time slots, Outlook displays a list of all appointments for the selected group member during that time period.

Contacts

Microsoft has also improved the Contacts component of Outlook. The Contacts list now supports instant messaging addresses. The default Contacts form also includes a new Display As address field for each contact item, allowing you to control how the contact's name appears in the Contacts list. For example, to differentiate between contacts with the same name but different e-mail addresses, you might use the Display As field to display the contact's e-mail address after the name. Or you might change the display name for contacts who have the same name to distinguish them from one another.

Offline/Online Enhancements

Outlook 2002 offers several improvements in online and offline use, including improved synchronization. One improvement is particularly worth noting: Outlook gives you the ability to automatically change send/receive behavior when the offline/online state changes, including such options as server polling frequency or whether a particular send/receive group is included when polling all groups.

New Synchronization Architecture

Outlook 2002 implements a new synchronization architecture to improve folder synchronization, improve usability, and enhance performance. This new synchronization architecture offers the following advantages:

- **Integrated synchronization.** Sending, receiving, and offline synchronization have been integrated into the same feature, simplifying message processing and synchronization.
- **Flexibility between scheduled and background send/receive.** You can configure scheduled and background message send/receive to behave differently according to the offline/online state. In addition, you can have Outlook perform predetermined send/receive tasks independently of other background send/receive tasks.
- **Selective send/receive.** Outlook makes it easy to perform a send/receive of only the selected folder depending on the account type.
- **Control send/receive behavior.** You can turn on or off all background send/receive tasks without changing Outlook's offline state.
- **Improved remote mail capability.** Outlook 2002 allows you to configure most account types to download message headers only.
- **Multiple account support.** Outlook simplifies managing multiple accounts, making it easy to send and receive through multiple accounts at one time. This is a significant usability improvement. In addition, each account can use different Dial-Up Networking settings, allowing you to easily control which dial-up connection a given account uses and ensure that the correct one is used when processing messages for that account.
- **Downloaded message behavior.** Downloaded messages automatically change their offline/online states based on the detected availability of the server.
- **Better progress notification.** Outlook 2002 now offers more detailed information regarding in-progress message processing.

Directory Enhancements

Outlook 2002 provides several improvements in the way it stores and presents information in address books and other directory services. These improvements include the following:

- **Better control over address book display.** Outlook now provides resizable address book columns and gives you more control over the address book display to let you view contacts in a way that best suits your needs.

Introduction

- **Active Directory recovery.** If an Active Directory General Catalog (GC) loss occurs, Exchange Server transparently redirects Outlook to a new GC in the domain.
- **Better offline address book support.** You can download your address book, allowing you to easily use addresses from the address book while working offline to create messages, meeting requests, appointments, and so on.

Improved International Support

Outlook offers improvements for users who work in an international environment, including the following:

- **Conditional formatting.** Outlook provides conditional formatting rules that work independently of the selected user interface language.
- **Automatic decoding detection.** Outlook automatically selects the appropriate encoding for Internet mail based on the content of the message. This feature relies on Microsoft Internet Explorer 5.5.
- **Improved alternate calendar support.** Outlook provides support for a lunar calendar, enabling you to create recurring meetings based on lunar months.

Conventions and Features Used in This Book

This book uses special text and design conventions to make it easier for you to find the information you need.

Text Conventions

Convention	Meaning
Abbreviated menu commands	For your convenience, this book uses abbreviated menu commands. For example, "Choose Tools, Track Changes, Highlight Changes" means that you should click the Tools menu, point to Track Changes, and select the Highlight Changes command.
Boldface type	Boldface type is used to indicate text that you enter or type.
Initial Capital Letters	The first letters of the names of menus, dialog boxes, dialog box elements, and commands are capitalized. Example: the Save As dialog box.
<i>Italicized type</i>	<i>Italicized</i> type is used to indicate new terms.
Plus sign (+) in text	Keyboard shortcuts are indicated by a plus sign (+) separating two key names. For example, Ctrl+Alt+Delete means that you press the Ctrl, Alt, and Delete keys at the same time.

Design Conventions

newfeature!

This text identifies a new or significantly updated feature in this version of the software.

InsideOut

These are the book's signature tips. In these tips, you'll get the straight scoop on what's going on with the software—inside information on why a feature works the way it does. You'll also find handy workarounds to different software problems.

tip Tips provide helpful hints, timesaving tricks, or alternative procedures related to the task being discussed.

Troubleshooting

Look for these sidebars to find solutions to common problems you might encounter. Troubleshooting sidebars appear next to related information in the chapters. You can also use the Troubleshooting Topics index at the back of the book to look up problems by topic.

Cross-references point you to other locations in the book that offer additional information on the topic being discussed.



This icon indicates sample files or text found on the companion CD.

caution Cautions identify potential problems that you should look out for when you're completing a task or problems that you must address before you can complete a task.

note Notes offer additional information related to the task being discussed.

Sidebar

The sidebars sprinkled throughout these chapters provide ancillary information on the topic being discussed. Go to sidebars to learn more about the technology or a feature.

Part 1

Working with Outlook

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newfeature!
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Outlook Architecture, Setup, and Startup

This chapter provides an overview of Microsoft Outlook's architecture to help you learn not only how Outlook works but also how it stores data. Having that knowledge, particularly if you're charged with administering or supporting Outlook for other users, will help you use the application more effectively and address issues related to data storage and security, archiving, working offline, and moving data between installations.

This chapter also explains the different options you have for connecting to e-mail servers through Outlook and the protocols (POP3 and IMAP, for example) that support those connections. In addition to learning about client support and the various platforms on which you can use Outlook, you'll also learn about the options that are available for starting and using the program.

If you're anxious to get started using Outlook, you could skip this chapter and move straight to Chapter 2, "Advanced Setup Tasks," to learn how to configure your e-mail accounts and begin working with Outlook. However, this chapter provides the foundation on which many subsequent chapters are based, and reading it will help you gain a deeper understanding of what Outlook can do so that you can use it effectively and efficiently.

Overview of Outlook

In many respects, Outlook is a personal information manager (PIM). A traditional PIM lets you maintain information about your contacts, such as your customers, coworkers, and clients. Traditional PIMs also let you keep track of your daily schedule, tasks to complete, and other personal or work-related

information. Outlook does all that, but it goes well beyond the features of most PIMs to provide e-mail and fax support, group scheduling capability, and task management.

Outlook provides a broad range of capabilities to help you manage your entire work day. In fact, a growing number of Microsoft Office users work in Outlook more than 60 percent of the time. An understanding of Outlook's capabilities and features is important not only to using Office effectively but also to managing your time and projects. The following sections will help you learn to use the features in Outlook to simplify your work day and enhance your productivity.

Messaging

One of the key features Outlook offers is messaging. You can use Outlook as a client to send and receive e-mail through a variety of services. Outlook offers integrated support for the following e-mail services:

note A *client application* is one that uses a service provided by another computer, typically a server.

Exchange Server Outlook provides full support for Microsoft Exchange Server, which means you can take advantage of workgroup scheduling, collaboration, instant messaging, and other features offered through Exchange Server that aren't available with other clients. For example, you can use any POP3 e-mail client, such as Outlook Express, to connect to an Exchange Server (assuming the Exchange Server is running an Internet Mail Connector), but you're limited to e-mail only. Advanced workgroup and other special features—being able to recall a message before it is read, use public folders, and vote, for example—require Outlook.

Internet e-mail Outlook provides full support for Internet e-mail servers, which means you can use Outlook to send and receive e-mail through mail servers that support Internet-based standards, such as POP3 and IMAP. What's more, you can integrate Internet mail accounts with other accounts, such as an Exchange Server account, to send and receive messages through multiple servers. For example, you might maintain an account on your Exchange Server for interoffice correspondence and use a local Internet service provider (ISP), CompuServe, Bigfoot, or other Internet-based e-mail service for messages outside your network. Or perhaps you want to monitor your personal e-mail along with your work-related e-mail. In that situation, you would simply add your personal e-mail account to your Outlook profile and work with both simultaneously. You can use rules and custom folders to help separate your messages.

For more information about messaging protocols such as POP3 and IMAP, see "Understanding Messaging Protocols," page 18.

Chapter 1: Outlook Architecture, Setup, and Startup

newfeature!

HTTP-based e-mail Outlook 2002 supports HTTP-based e-mail services, such as Microsoft Hotmail. HTTP (Hypertext Transfer Protocol) is the protocol used to request and transmit Web pages. This means you can use Outlook to send and receive e-mail through Hotmail and other HTTP-based mail servers that would otherwise require you to use a Web browser to access your e-mail (see Figure 1-1). In addition, you can download your messages to your local inbox and process them offline, rather than remaining connected to your ISP while you process messages. Another advantage is that you can keep your messages as long as you want—most HTTP-based messaging services, including Hotmail, purge read messages after a given period of time. Plus, HTTP support in Outlook lets you keep all your e-mail in a single application. Currently, Outlook 2002 directly supports Hotmail. Check with your e-mail service to determine whether your mail server is Outlook-compatible.



Figure 1-1. HTTP-based mail servers such as Hotmail have traditionally required access through a Web browser.

Fax send and receive Outlook 2002 includes a Fax Mail Transport provider, which allows you to send and receive faxes using a fax modem. The Fax Mail Transport included with Outlook provides Messaging Application Programming Interface (MAPI) support so that incoming fax messages can be routed through your Outlook Inbox, with the MAPI-aware fax application handling the actual fax processing (send, receive, view, and so on). Most Microsoft platforms provide built-in fax capability, but actual support varies from one platform to another. In addition, third-party developers can provide MAPI integration with their fax applications, allowing you to use Outlook as the front end for those applications to send

Part 1: Working with Outlook

and receive faxes. Symantec's WinFax is a good example of such an application. The fax service in Microsoft Windows 2000 also supports MAPI and Inbox integration with Outlook and is the only Microsoft-supplied fax service supported by Microsoft for Outlook.

InsideOut

Windows 2000 fax service is now the only fax support offered for Windows. Windows 9x users will need to purchase a third-party fax application such as WinFax.

For a detailed explanation of how to use Outlook to send and receive faxes (complete with cover pages and other details), see Chapter 9, "Sending and Receiving Faxes."

Extensible e-mail support Outlook's design allows developers to support third-party e-mail services in Outlook, such as cc:Mail and Lotus Notes. This support doesn't guarantee the availability of these third-party tools, however. For example, although earlier versions of Outlook included support for cc:Mail, Microsoft no longer offers its own service provider for support of cc:Mail.

InsideOut

Outlook 2002 does not include the Microsoft Mail service provider. Microsoft no longer supports this product and customers who used this service will need to find another service provider.

Whatever your e-mail server type, Outlook provides a comprehensive set of tools for composing, receiving, and replying to messages. Outlook provides support for rich-text and HTML formatting, which allows you to create and receive messages that contain much more than just text (see Figure 1-2). For example, you can send a Web page as a mail message or integrate sound, video, and graphics in mail messages. Outlook's support for multiple address books, multiple e-mail accounts, and even multiple e-mail services makes it an excellent messaging client, even if you forgo the application's many other features and capabilities.

Scheduling

Scheduling is another important feature in Outlook. You can use Outlook to track both personal and work-related meetings and appointments (see Figure 1-3), whether at home or in the office, a useful feature even on a stand-alone computer.

Chapter 1: Outlook Architecture, Setup, and Startup

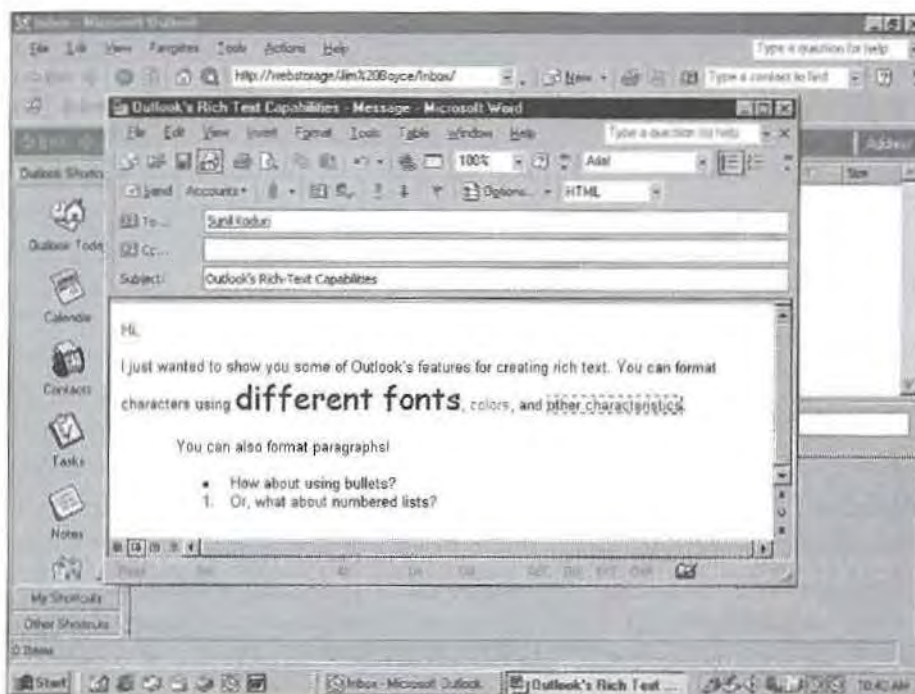


Figure 1-2. Use Outlook to create rich-text and multimedia messages.

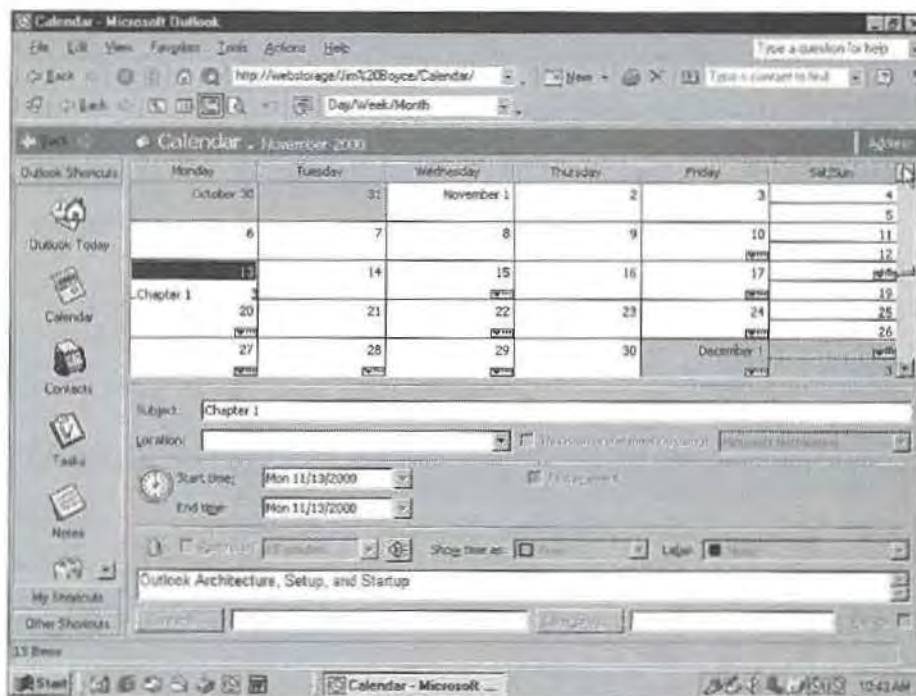


Figure 1-3. Track your personal and work schedules with Outlook.

newfeature!

Where Outlook's scheduling capabilities really shine, however, is in group scheduling. When you use Outlook to set up meetings and appointments with others, you can view the schedules of your invitees, which makes it easy to find a time when everyone can attend. You can schedule both one-time and recurring appointments. All appointments and meetings can include a reminder with a lead time that you specify, and

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Outlook will notify you of the event at the specified time. A new feature in Outlook 2002 lets you process multiple reminders at one time, a useful feature if you've been out of the office for a while.

newfeature!

Organizing your schedule is also one of Outlook's strong suits. You can use categories and types to categorize appointments, events, and meetings; to control the way they appear in Outlook; and to perform automatic processing. Color labels allow you to identify quickly and visually different types of events on your calendar.

In addition to managing your own schedule, you can delegate control of the schedule to someone else, such as your assistant. The assistant can modify your schedule, request meetings, respond to meeting invitations, and otherwise act on your behalf regarding your calendar. Not only can others view your schedule to plan meetings and appointments (with the exception of items marked personal), but you can also publish your schedule to the Web to allow others to view it over an intranet or the Internet (see Figure 1-4).

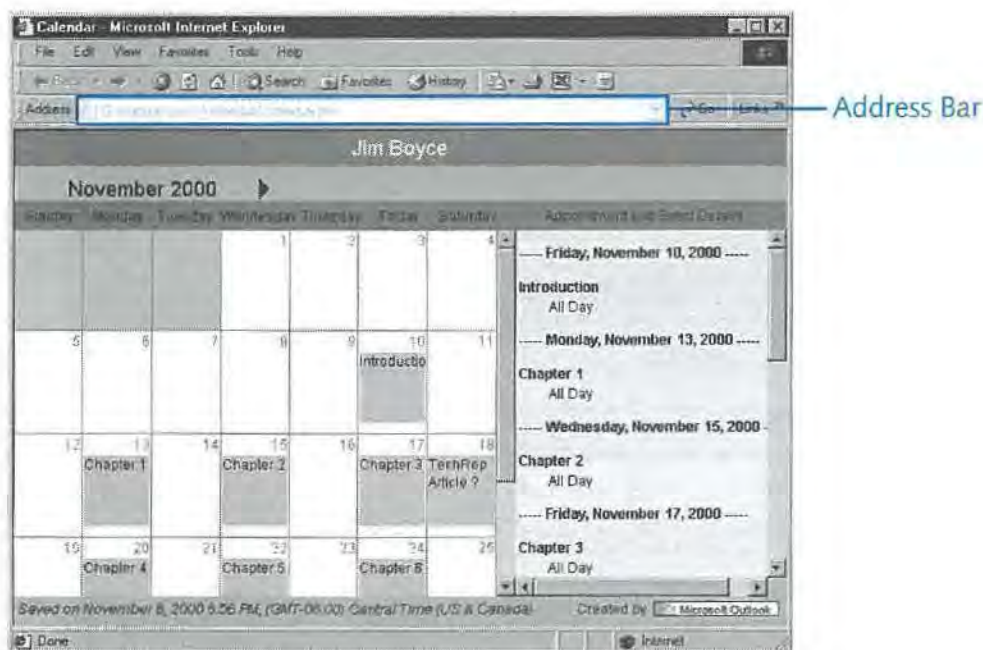


Figure 1-4. You can easily publish your schedule to the Web.

Contact Management

Being able to manage contact information—names, addresses, and phone numbers—is critical to other aspects of Outlook, such as scheduling and messaging. Outlook makes it easy to manage contacts and offers flexibility in the type of information you maintain. In addition to basic information, you can also store a contact's fax number, cell phone number, pager number, Web page URL, and more (see Figure 1-5).

Chapter 1: Outlook Architecture, Setup, and Startup

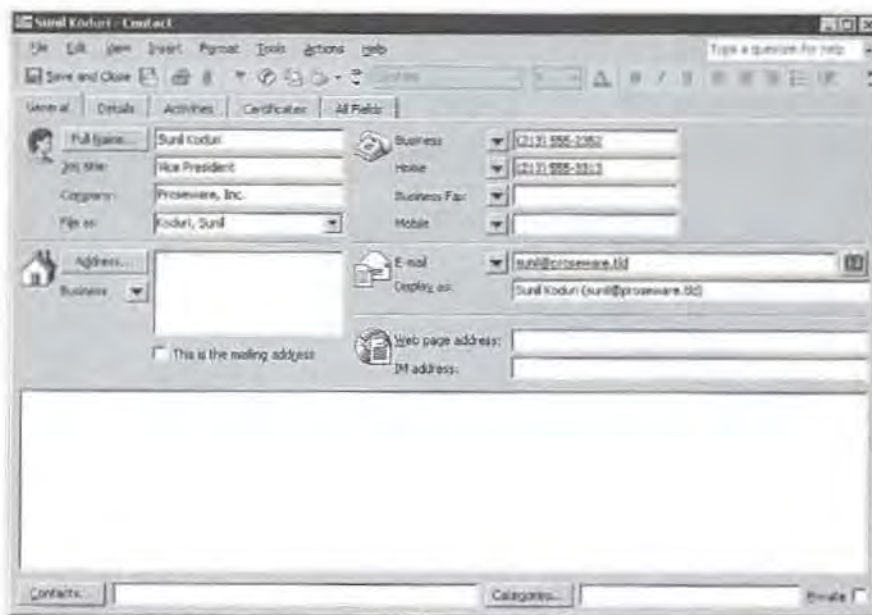


Figure 1-5. You can manage a wealth of information about each contact.

Besides using contact information to address e-mail messages, you can initiate phone calls using the contacts list, track calls to contacts in the journal, add notes for each contact, use the contacts list to create mail merge documents, and perform other tasks. The Contacts folder also provides a means for storing a contact's digital certificate, which you can use to exchange encrypted messages for security. Adding a contact's certificate is easy—just receive a digitally signed message from the contact and Outlook will add the certificate to the contact's entry. You can also import a certificate from a file provided by the contact.

For details about digital signatures and encryption, see "Encrypting Messages," page 354. For additional information on the journal, see "Tracking with Outlook's Journal," page 10. For complete details on how to use the journal, see Chapter 17, "Keeping a Journal."

Task Management

Managing your work day usually includes keeping track of the tasks you need to perform and assigning tasks to others. Outlook makes it easy to manage your task list. You assign a due date, start date, priority, category, and other properties to each task, which makes it easier for you to manage those tasks (see Figure 1-6). As with meetings and appointments, Outlook keeps you informed and on track by issuing reminders for each task. You control whether the reminder is used and the time and date it's generated, along with an optional, audible notification. You can designate a task as personal, preventing others from viewing the task in your schedule—just as you can with meetings and appointments. Tasks can be one-time or recurring.

Part 1: Working with Outlook

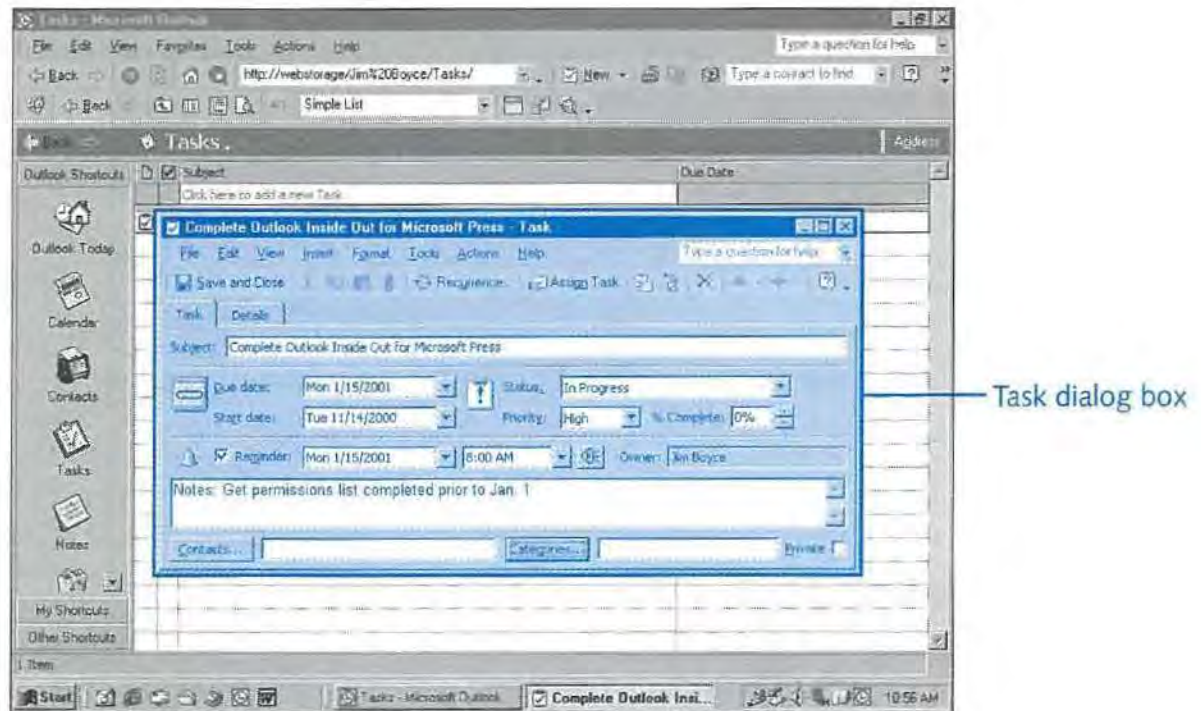


Figure 1-6. Use Outlook to manage tasks.

If you manage others, Outlook makes it easy to assign tasks to other Outlook users. When you create a task, you simply click **Assign Task**, and Outlook prompts you for the assignee's e-mail address. You can choose to keep a copy of the updated task in your own task list and receive a status report when the task is complete.

Tracking with Outlook's Journal

Keeping track of events is an important part of managing your work day, and Outlook's journal makes it simple. The Journal folder allows you to keep track of the contacts you make (phone calls, e-mails, and so on), meeting actions, task requests and responses, and other actions for selected contacts (see Figure 1-7). You can also use the journal to track your work in other Microsoft Office applications, giving you a way to track the time you spend on various documents and their associated projects. You can have Outlook journal items automatically based on settings that you specify, and you can also add items manually to your journal.

Chapter 1: Outlook Architecture, Setup, and Startup

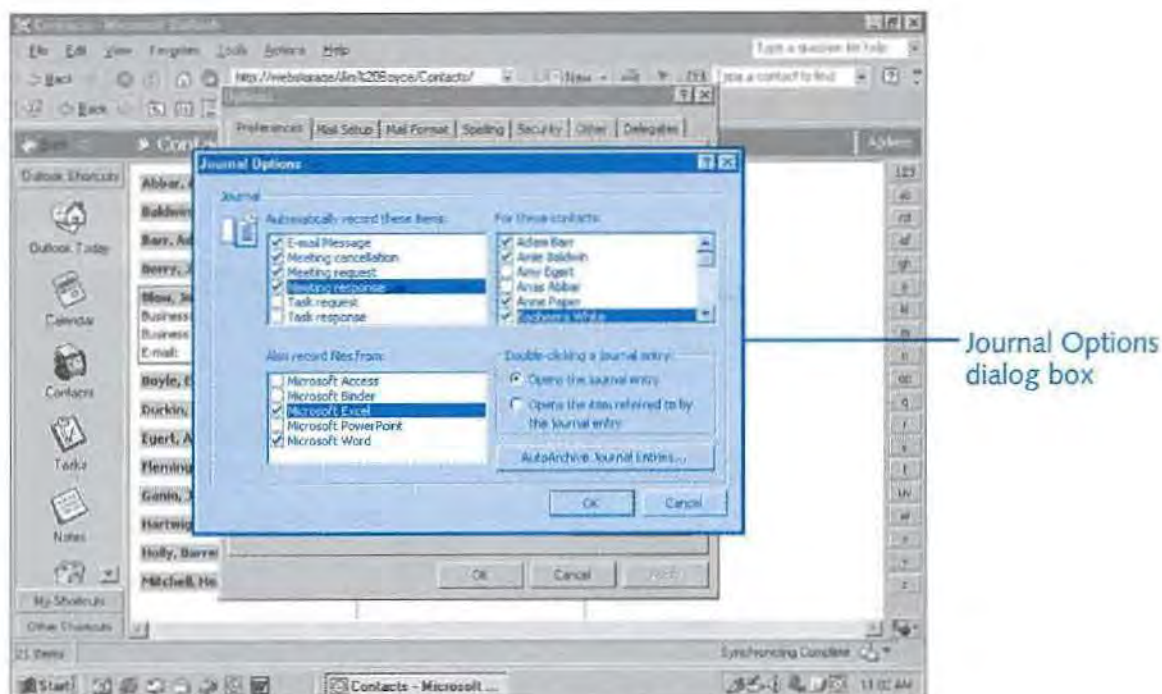


Figure 1-7. Configure your journal using Outlook's options.

When you view the journal, you can double-click a journal entry to either open the entry or open the items referred to by the entry, depending on how you have configured the journal. You can also configure the journal to automatically archive items to the default archive folder or a folder you choose, or you can have Outlook regularly delete items from the journal, cleaning out items that are older than a specified length of time. Outlook can use group policies to control the retention of journal entries, allowing a system administrator to manage journaling and data retention consistently throughout an organization.

Organizing Your Thoughts with Notes

With Outlook, you can keep track of your thoughts and tasks by using the Notes folder. Each note can function as a stand-alone window, allowing you to view notes on your desktop outside Outlook (see Figure 1-8). Notes exist as individual message files, so you can copy or move them to other folders, including your desktop, or easily share them with others through network sharing or e-mail. You can also incorporate the contents of notes into other applications or other Outlook folders by using the clipboard. For example, you might copy a note regarding a contact to that person's contact entry. As you can with other Outlook items, you can assign categories to notes to help you organize and view them.

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Figure 1-8. Use notes to keep track of miscellaneous information.

How Outlook Stores Data

If you work with Outlook primarily as a user, understanding how the program stores data will help you use it effectively to organize and manage your data on a daily basis, including storing and archiving Outlook items as needed. If you're charged with supporting other Outlook users, understanding how Outlook stores data will allow you to help others create and manage their folders and ensure the security and integrity of their data. And finally, because data storage is the foundation of all Outlook's features, understanding where and how the program stores data is critical if you're creating Outlook-based applications—for example, a data entry form that uses Outlook as the mechanism for posting the data to a public folder.

For information on building Outlook-based applications, see Chapters 40 through 43, which cover programming Outlook using Visual Basic and VBScript to create custom forms and applications.

You're probably familiar with folders (directories) in the file system. You use these folders to organize applications and documents. For example, the Program Files folder in the Microsoft Windows operating system is the default location for most applications that you install on the system, and the My Documents folder serves as the default location for document files. You create these types of folders in Windows Explorer.

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Outlook also uses folders to organize data, but these folders are different from your file system folders. Rather than existing individually on your system's hard disk, these folders exist within Outlook's file structure. You view and manage these folders within Outlook's interface, not in Windows Explorer. Think of Outlook's folders as windows into your Outlook data rather than as individual elements that exist on disk. By default, Outlook includes several folders, as shown in Figure 1-9.

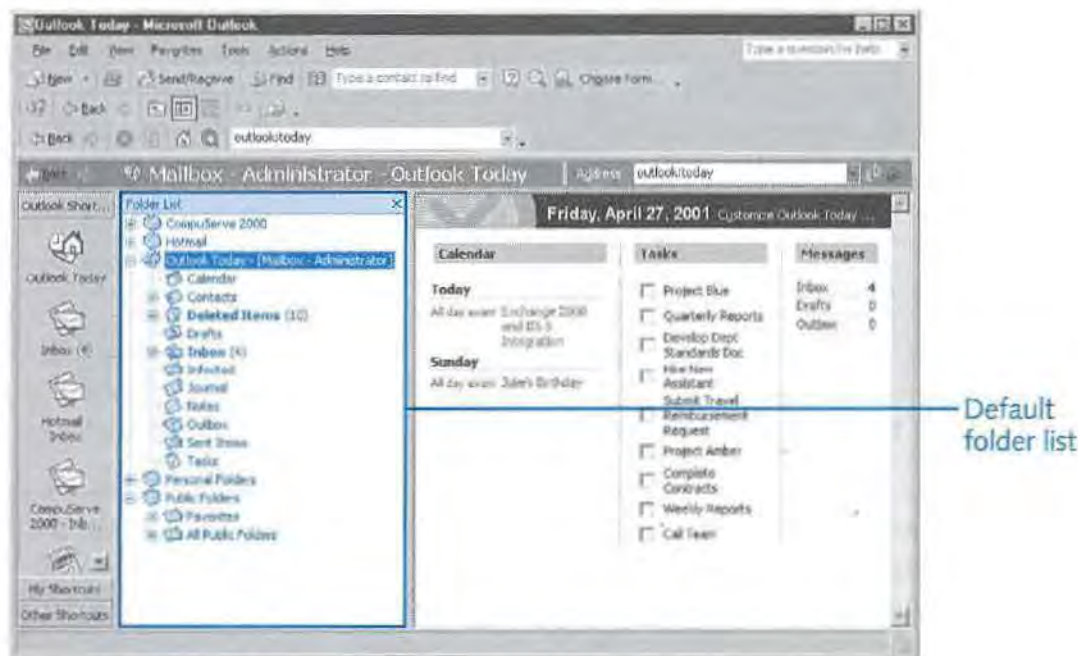


Figure 1-9. Folders organize your data in Outlook.

Personal Folders—PST Files

If your Outlook folders aren't stored as individual folders on your system's hard disk, where are they? The answer to that question depends on how you configure Outlook. As in earlier versions of Outlook, you can use a personal folders file to store your Outlook data. Outlook uses the PST file extension for a personal folders file, but you specify the file's name when you configure Outlook. For example, you might use your name as the file name to help you easily identify the file. The default PST file contains your Contacts, Calendar, Tasks, and other folders.

You can use multiple PST files, adding additional personal folders to your Outlook configuration (see Figure 1-10 on the next page). For example, you might want to create another set of folders to separate your personal information from work-related data. As you'll learn in Chapter 2, you can add personal folders to your Outlook configuration simply by adding another PST file to your profile.

Part 1: Working with Outlook

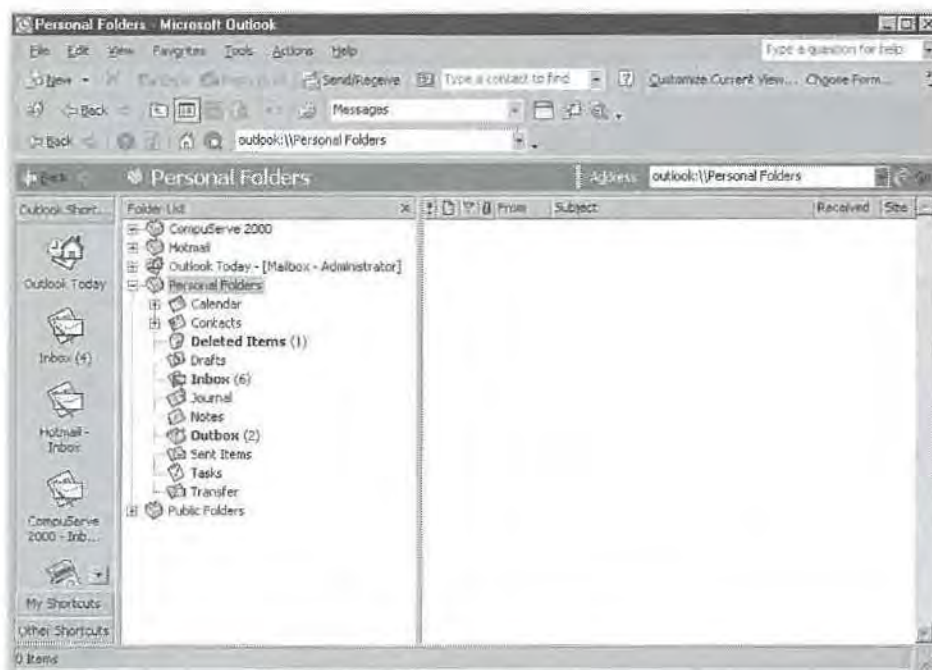


Figure 1-10. You can add multiple sets of folders to your Outlook configuration.

note If you use Outlook as an Exchange Server client, you probably store your data in the Exchange Server mailbox rather than in a local PST file. If that's the case, you need to use an offline folder (OST) file in order to work offline. OST files are covered in the following section.

OST Files

If you use Outlook as an Exchange Server client and do not use PST files to store your data (instead storing your data on the Exchange Server), OST files will allow you to work offline. The OST file acts essentially as an offline copy of your data store on the Exchange Server. When you're working offline, changes you make to contacts, messages, and other Outlook items and folders occur in the offline store. When you go online again, Outlook synchronizes the changes between the offline store and your Exchange Server store. For example, if you've deleted messages from your offline store, Outlook deletes those same messages from your online store when you synchronize the folders. Any new messages in your Inbox on the server are added to your offline store. Synchronization is a two-way process, providing the most up-to-date copy of your data in both locations, ensuring that changes made in each are reflected in the other.

For detailed information on important offline and remote access topics, see Chapter 35, "Working Offline and Remotely." For a discussion of the differences between remote mail and offline use, see Chapter 13, "Processing Messages Selectively."

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Where Storage Files Are Located

When you create an Outlook storage file, Outlook defaults to a specific location for the file that varies according to your operating system:

- **Windows 9x.** The default location is \Windows\Local Settings\Application Data\Microsoft\Outlook. On systems running Windows 9x that are configured to maintain unique user profiles (useful where multiple users share a single Windows 9x computer), the user profiles are stored in the \Profiles folder. On these systems, Outlook places the storage files by default in \Profiles\<user>\Local Settings\Application Data\Microsoft\Outlook.

tip To maintain unique user profiles in Windows 98, configure Windows through the Users icon in Control Panel.

- **Windows NT.** The default location for systems running Windows NT is %systemroot%\Profiles\<user>\Local Settings\Application Data\Microsoft\Outlook, where %systemroot% by default is \Winnt.
- **Windows 2000.** The default location is \Documents And Settings\<user>\Local Settings\Application Data\Microsoft\Outlook. On systems running Windows 2000 that were upgraded from Windows NT, the user profiles still reside in the \Winnt\Profiles folder. On these systems, therefore, Outlook places the storage files by default in %systemroot%\Profiles\<user>\Local Settings\Application Data\Microsoft\Outlook. As with Windows NT, %systemroot% defaults to \Winnt.

tip Find your data store

If you're having trouble locating your existing storage files, choose File, Data File Management. In the Outlook Data Files dialog box (see Figure 1-11 on the next page), select the file you want to locate and then determine the file location from the File-name column. If you can't see the entire path, drag the column border to expand the column. Alternatively, to go straight to the folder containing the file, select the file and click Open Folder. In the folder window, choose Tools, Folder Options. From the View tab of the Folder Options dialog box, select Display The Full Path In The Title Bar to view the absolute, full path to the file. You can also use your operating system's Find/Search command to search for all files with a PST or OST file extension.

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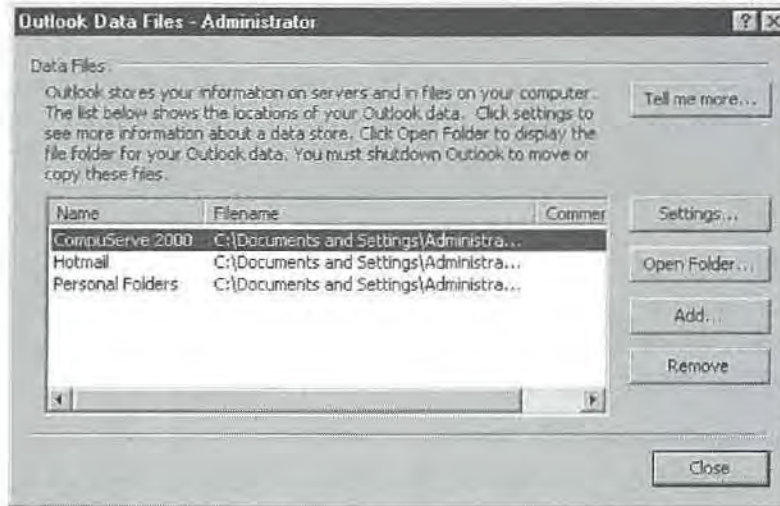


Figure 1-11. Locate your data files by using the Outlook Data Files dialog box.

If you use the same computer all the time, it's generally best to store your Outlook files on your system's local hard disk. In some situations, however, you will probably want to store them on a network share. For example, you might connect from different computers on the network and use a roaming profile to provide a consistent desktop and user interface regardless of your logon location. (A *roaming profile* allows your desktop configuration, documents, and other elements of your desktop environment to be duplicated wherever you log on.) In this situation, you (or the network administrator) would configure your profile to place your home folder on a network server that is available to you from all logon locations. Your Outlook files would then be stored on that network share, making them available to you on whichever computer you use to log on to the network. Placing your Outlook files on a server gives you the added potential benefit of incorporating your Outlook data files in the server's backup strategy.

For a detailed discussion of using roaming profiles to provide seamless access to Outlook, see Chapter 37, "Network, Platform, and Deployment Considerations." To learn how to move your Outlook files from one location to another (such as from a local drive to a network share), see "Changing Your Data Storage Location," page 54.

Troubleshooting

You use a roaming profile and logon time is increasing.

If you use Outlook as a client for Exchange Server, your best option is to use your Exchange Server mailbox as the store location for your data rather than using a PST file. However, if you use a roaming profile for consistent logon from multiple locations on the local area network (LAN), consider including the OST file in the roaming profile so that you'll always have access to it. If the Exchange Server is unavailable, you'll still be able to work with your Outlook data through the OST file; and placing the OST file in your roaming profile allows you to use it regardless of your logon location.

Keep in mind, however, that the OST file can become quite large if you have a lot of data in your Exchange Server mailbox. The size of the profile affects logon time, and a large profile can cause an excessive amount of network traffic as the files are copied from the server to your workstation. Use aggressive archiving and other housecleaning methods to keep your Outlook data to a minimum, and monitor your roaming profile size as often as possible.

Sharing Storage Files

Outlook provides excellent functionality for sharing information with others. Toward that end, you can share your data using a couple of different methods. You can configure permissions for individual folders to allow specific users to connect to those folders and view the data contained in them. You can also configure delegate access to your folders to allow an assistant to manage items for you in the folders. For example, you might have your assistant manage your schedule but not your tasks. In that case, you would configure delegate access for the Calendar folder but not for the Tasks folder.

For a detailed discussion of delegation, see Chapter 27, "Delegating Responsibilities to an Assistant." To learn how to configure sharing permissions for individual folders and additional methods for sharing data, see Chapter 34, "Sharing Information with Others."

Understanding Messaging Protocols

A *messaging protocol* is a mechanism that messaging servers and applications use to transfer messages. Being able to use a specific e-mail service requires that your application support the same protocols the server uses. In order to configure Outlook as a messaging client, you need to understand the various protocols supported by Outlook and the types of servers that employ each type. The following sections provide an overview of these protocols.

SMTP/POP3

Simple Mail Transport Protocol (SMTP) is a standards-based protocol used for transferring messages and is the primary mechanism that Internet-based and intranet-based e-mail servers use to transfer messages. It's also the mechanism that Outlook uses to connect to a mail server to send messages for an Internet account. Therefore, SMTP is the protocol used by an Internet mail account for outgoing messages.

SMTP operates by default on TCP port 25. When you configure an Internet-based e-mail account, the outgoing mail server setting is determined by the port on which the server is listening for SMTP. Unless your e-mail server uses a different port (unlikely), you can use the default port value of 25.

Post Office Protocol 3 (POP3) is a standards-based protocol that clients can use to access messages from any mail server that supports POP3. This is the protocol that Outlook uses when retrieving messages from an Internet-based or intranet-based mail server that supports POP3 mailboxes. ISP-based mail servers invariably use POP3, as do other mail servers. For example, CompuServe Classic provides POP3 support, allowing you to retrieve your CompuServe mail through Outlook. Exchange Server also supports the use of POP3 for retrieving mail.

POP3 operates on TCP port 110 by default. Unless your server uses a nonstandard port configuration, you can leave the port setting as is when defining a POP3 mail account. Figure 1-12 shows the Internet E-Mail Settings dialog box, which you use to configure the incoming and outgoing mail server settings for an Internet mail account. Click the More Settings button if you need to change port settings for the account.

To learn how to set up an Internet e-mail account for an SMTP/POP3 server, see "Using Internet POP3 E-Mail Accounts," page 154. To learn how to add the account and configure advanced properties, such as SMTP or POP3 port assignments, see "Configuring Advanced Settings for Internet Accounts," page 159.

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Figure 1-12. Use the E-Mail Accounts Wizard's Internet E-Mail Settings page to configure the incoming and outgoing mail server settings.

IMAP

Like POP3, Internet Mail Access Protocol (IMAP) is a standards-based protocol that enables message transfer. However, IMAP offers some significant differences from POP3. For example, POP3 is primarily designed as an offline protocol, which means you retrieve your messages from a server and download them to your local message store (such as your local Outlook folders). IMAP is designed primarily as an online protocol, which allows a remote user to manipulate messages and message folders on the server without having to download them. This is particularly helpful for users who need to access the same remote mailbox from multiple locations, such as from home and work, using different computers. Because the messages remain on the server, IMAP eliminates the need for message synchronization.

tip Keep messages on the server

You can configure a POP3 account in Outlook to leave a copy of messages on the server, allowing you to retrieve those messages later from another computer. To learn how to configure a POP3 account, see "Using Internet POP3 E-Mail Accounts," page 154.

IMAP offers other advantages over POP3. For example, with IMAP, you can search for messages on the server using a variety of message attributes, such as sender, message size, or message header. IMAP also offers better support for attachments, because it can separate attachments from the header and text portion of a message. This is particularly useful with multipart MIME messages, allowing you to read a message without

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downloading the attachments so that you can decide which attachments you want to retrieve. With POP3, the entire message must be downloaded.

Security is another advantage of IMAP, because IMAP uses a challenge-response mechanism to authenticate the user for mailbox access. This prevents the user's password from being transmitted as clear text across the network, as it is with POP3.

IMAP support in Outlook allows you to use Outlook as a client to an IMAP-compliant e-mail server. Although IMAP provides for server-side storage and the ability to create additional mail folders on the server, it does not offer some of the same features as Exchange Server or even POP3. For example, you can't store nonmail folders on the server. Also, special folders such as Sent Items, Drafts, and Deleted Items can't be stored on the IMAP server. Even with these limitations, however, IMAP serves as a flexible protocol and surpasses POP3 in capability. Unless a competing standard appears in the future, it is likely that IMAP will replace POP3.

For information about other advantages and disadvantages of IMAP and how they affect Outlook, see "Using IMAP Accounts," page 161.

note For additional technical information on IMAP, point your browser to <http://www.ima.com/whitepaper/index.html> or <http://www.cyrusoft.com/imap/imapInfo.html>, or refer to RFC 2060, which you can find at <http://www.ietf.org/rfc/rfc2060.txt>.

MAPI

Messaging Application Programming Interface (MAPI) is a Microsoft-developed application programming interface (API) that facilitates communication between mail-enabled applications. MAPI support makes it possible for other applications to send and receive messages using Outlook. For example, third-party fax applications, such as Symantec's WinFax, can place incoming faxes in your Inbox through MAPI. As another example, a third-party MAPI-aware application could read and write to your Outlook Address Book through MAPI calls. MAPI is not a message protocol, but understanding its function in Outlook will help you install, configure, and use MAPI-aware applications to integrate Outlook.

LDAP

Lightweight Directory Access Protocol (LDAP) was designed to serve with less overhead and fewer resource requirements than its precursor, the Directory Access Protocol, which was developed for X.500. LDAP is a standards-based protocol that allows clients to query data in a directory service over a TCP connection. For example, Windows 2000 uses LDAP as the primary means for querying the Active Directory (AD). Exchange Server

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supports LDAP queries, allowing clients to look up address information for subscribers on the server. Other directory services on the Internet, such as Bigfoot, InfoSpace, Yahoo!, and others, employ LDAP to implement searches of their databases.

Like Outlook Express, Outlook 2002 allows you to add directory service accounts that use LDAP as their protocol to query directory services for e-mail addresses, phone numbers, and other information regarding subscribers.

To learn how to add and configure an LDAP directory service in Outlook, see "Configuring a Directory Service Account in Outlook," page 425.

note For additional information regarding LDAP, refer to "MS Strategy for Lightweight Directory Access Protocol (LDAP)," available in the NT Server Technical Notes section of Microsoft TechNet or on the Web at <http://www.microsoft.com/TechNet/winnt/Winntas/technote/ldapcmr.asp>.

NNTP

Network News Transport Protocol (NNTP) is the standards-based protocol for server-to-server and client-to-server transfer of news messages, or the underlying protocol that makes possible public and private newsgroups. Outlook does not directly support the creation of accounts to access newsgroup servers, but instead relies on Outlook Express as its default newsreader (see Figure 1-13).

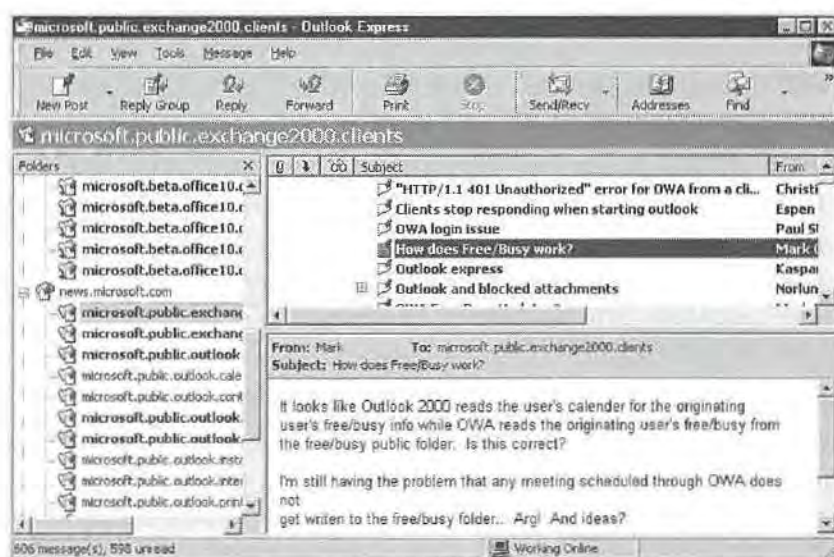


Figure 1-13. Outlook relies on Outlook Express for reading and posting to public and private newsgroups.

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note Microsoft Windows 2000 Server includes an NNTP service that lets a network administrator set up a news server to host newsgroups that can be accessed by local intranet or remote Internet users. Exchange Server allows the NNTP service to interface with other public or private news servers to pull newsgroups and messages via news feeds. Therefore, Windows 2000 Server by itself lets you set up your own newsgroup server to host your own newsgroups, and Exchange Server lets you host public Internet newsgroups.

Using Outlook Express, you can download newsgroups, read messages, post messages, and perform other news-related tasks. Other third-party news applications, such as Forte's Agent, offer extended capabilities. Forte's Web site is located at <http://www.forteinc.com>.

For a detailed explanation of setting up Outlook Express as a news reader, see Chapter 11, "Using Outlook Express for Public and Private Newsgroups."

HTML

Hypertext Markup Language (HTML) is the protocol used most commonly to define and transmit Web pages. Several e-mail services, including Hotmail and Yahoo!, provide access to client mailboxes via Web pages and therefore make use of HTML as their message transfer protocol. You connect to the Web site and use the features and commands found there to view messages, send messages, and download attachments.

Outlook provides enhanced HTML support, which means you can configure Outlook as a client for HTML-based mail services. As mentioned earlier in the chapter, Outlook includes built-in support for Hotmail. HTML support is purely a server-side issue, so HTML-based mail services other than Hotmail will have to provide Outlook support on their own sites. Hotmail accomplishes this support programmatically by means of Active Server Pages (ASP).

tip Find Hotmail's Outlook-based access

The URL for Hotmail's Outlook-based access is <http://services.msn.com/svcs/hotmail/httpmail.asp>. Outlook configures the URL automatically when you set up a Hotmail account in Outlook (see Figure 1-14). You can't browse to this URL through your Web browser to retrieve your e-mail, however.

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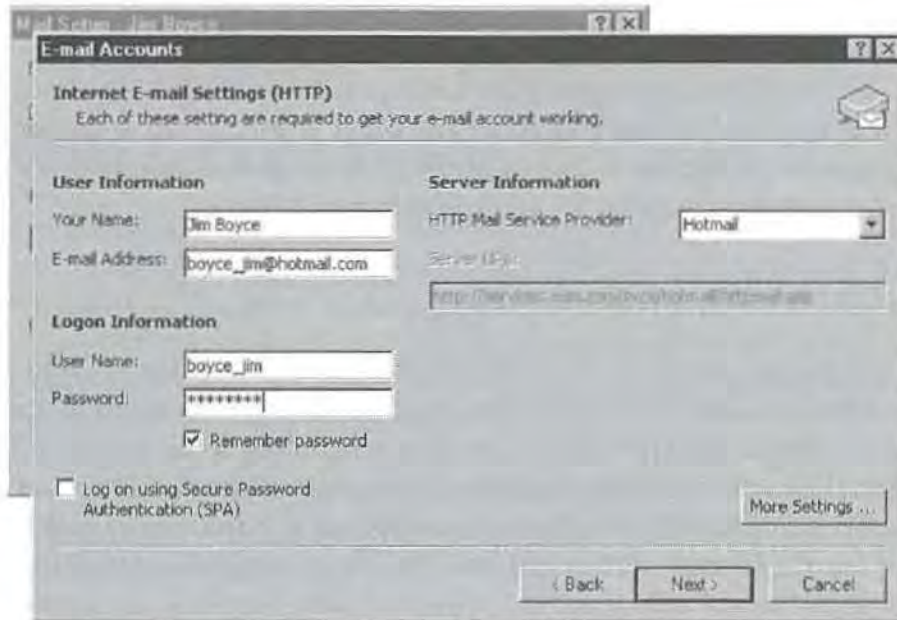


Figure 1-14. Outlook configures the URL automatically for Hotmail, but you must enter the URL manually for other HTTP-based e-mail services.

MIME

Multipurpose Internet Mail Extensions (MIME) is a standard specification for defining file formats used to exchange e-mail, files, and other documents across the Internet or an intranet. Each of the many MIME types defines the content type of the data contained in the attachment. MIME maps the content to a specific file type and extension, allowing the e-mail client to pass the MIME attachment to an external application for processing. For example, if you receive a message containing a WAV file attachment, Outlook passes the file to the default WAV file player on your system.

S/MIME

Secure Multipurpose Internet Mail Extensions (S/MIME) is a standard that allows e-mail applications to send digitally signed and encrypted messages. S/MIME is therefore a mechanism through which Outlook permits you to include digital signatures with messages to ensure their authenticity and to encrypt messages to prevent unauthorized access to them.

For a detailed discussion of using Outlook to send digitally signed and encrypted messages, as well as other security-related issues such as virus protection and security zones, see Chapter 12, "Securing Your System, Messages, and Identity."

MHTML

MIME HTML (MHTML) represents MIME encapsulation of HTML documents. MHTML allows you to send and receive Web pages and other HTML-based documents and to embed images directly in the body of a message rather than attaching them to the message. See the preceding sections for an explanation of MIME.

iCalendar, vCalendar, and vCard

iCalendar, vCalendar, and vCard are Internet-based standards that provide a means for people to share calendar free/busy information and contact information across the Internet. The iCalendar standard allows calendar/scheduling applications to share free/busy information with other applications that support iCalendar. The vCalendar standard provides a mechanism for vCalendar-compliant applications to exchange meeting requests across the Internet. The vCard standard allows applications to share contact information as Internet vCards (electronic business cards). Outlook supports these standards in order to share information and interact with other messaging and scheduling applications across the Internet.

Security Provisions in Outlook

Outlook 2002 provides several features for ensuring the security of your data, messages, and identity. This section of the chapter presents a brief overview of security features in Outlook to give you a basic understanding of the issues involved, with references to other locations in the book that offer more detailed information on these topics.

Support for Security Zones

Like Microsoft Internet Explorer, Outlook supports the use of security zones. In Internet Explorer, security zones allow you to specify the types of actions that scripts can take on your system, based on the zone from which they were accessed. This prevents a malicious script from surreptitiously gathering information from your system and sending it to a Web site or doing local damage such as deleting files. In Internet Explorer, you can configure four zones, each with different security settings that define the tasks scripts can perform. For example, you can disable download of signed and unsigned ActiveX controls, specify how cookies are stored on your system, or disable scripting of Java applets.

Because Outlook can receive HTML-based messages, your computer is exposed to the same security risks posed by Internet browsing with Internet Explorer. The risk is actually worse with e-mail, considering that you generally make a conscious effort to visit a Web page—e-mail messages, in contrast, come at you unbidden, therefore making your system subject to a more active form of attack. By supporting Internet Explorer's security zones, Outlook allows you to specify the zone from which e-mail messages should be considered to have originated, letting you guard against HTML-based security risks.

Facebook's Exhibit No. 1003

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To learn how to apply security zones to protect your system, see "Using Security Zones," page 330.

newfeature!

Attachment and Virus Security

You probably are aware that a *virus* is an application that infects your system and typically causes some type of damage. The action caused by a virus can be as innocuous as displaying a message or as damaging as deleting data from your hard disk. One especially insidious form of virus, called a *worm*, spreads itself automatically, usually by mailing itself to every contact in the infected system's address book. Guarding against such viruses, then, is a critical issue.

Outlook offers two levels of attachment security to guard against virus and worm infections, Level 1 and Level 2. Outlook automatically blocks Level 1 attachments, a category that includes almost 40 file types with the potential to allow a virus to cause damage to your system—for example, EXE and VBS files. If you receive a Level 1 attachment, Outlook displays a paper clip icon beside the message but does not allow you to open or save the attachment. When you send a Level 1 attachment, Outlook displays a reminder that other Outlook users might not be able to receive the attachment, giving you the option of converting it to a different file type (such as a ZIP file) before sending it. If you receive a Level 2 attachment, Outlook allows you to save the attachment to disk but not open it directly. You can then process the file with your virus checker before opening it.

tip Update your virus definitions often

Your virus scanner is only as good as its definition file. New viruses crop up every day, so it's critical that you have an up-to-date virus definition file and put in place a strategy to ensure that your virus definitions are always current.

If you use Exchange Server to host your mailbox, the Exchange Server administrator can configure Level 1 and Level 2 attachments, adding or removing attachment types for each level. In addition, Outlook allows all users to control the security-level assignments for attachments.

For a detailed discussion of Outlook's virus protection, see "Protecting Against Viruses in Attachments," page 360.

Macro Viruses

Although viruses were once found almost exclusively in executable files, viruses embedded in document macros have become very common, and Office documents are as subject to them as any. However, Outlook and other Office applications provide a means for you to guard against macro viruses. In Outlook, you can select one of three macro security levels, as shown in Figure 1-15 on the next page. These security levels let you

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configure Outlook to run only signed macros from trusted sources (High), prompt you to choose whether to let the macro execute (Medium), or allow all macros to execute (Low). You can also specify which sources are trusted.

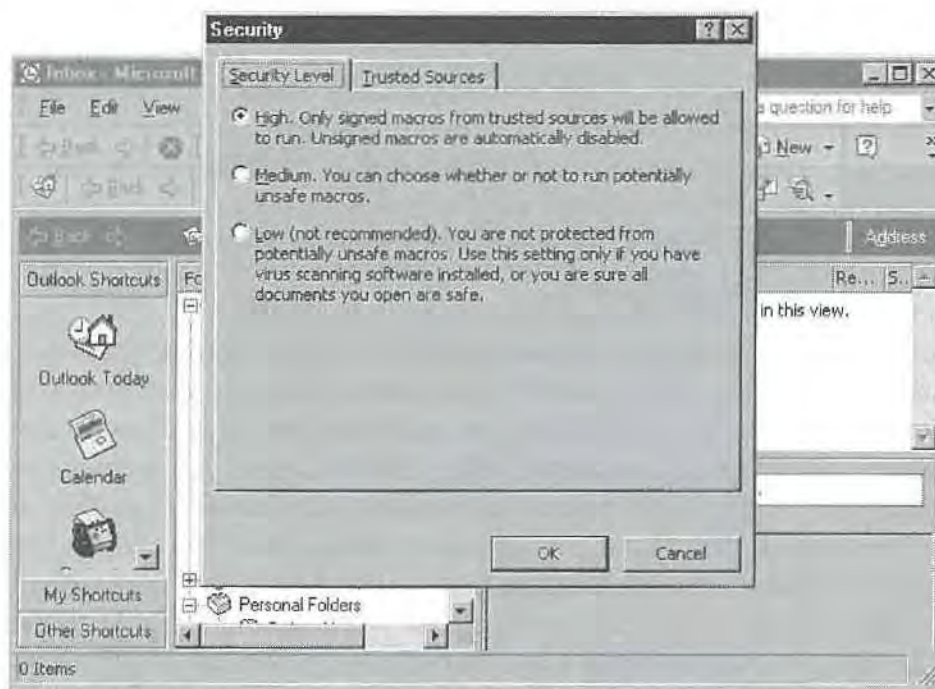


Figure 1-15. Use macro security to prevent macro-borne viruses from affecting your system.

To learn how to configure and use macro virus protection, see "Protecting Against Office Macro Viruses," page 364.

Digital Signatures

Outlook allows you to add a certificate-based digital signature to a message to validate your identity to the message recipient. Because the signature is derived from a certificate that is issued to you and that you share with the recipient, the recipient can be guaranteed that the message originated with you, rather than with someone trying to impersonate your identity.

For information about how to obtain a certificate and use it to digitally sign your outgoing messages, see "Protecting Messages with Digital Signatures," page 332.

In addition to signing your outgoing messages, you can also use secure message receipts that notify you that your message has been verified by the recipient's system. The lack of a return receipt indicates that the recipient's system did not validate your identity. In such a case, you can contact the recipient to make sure that he or she has a copy of your digital signature.

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note Although you can configure Outlook to send a digital signature to a recipient, there is no guarantee that the recipient will add the digital signature to his or her contacts list. Until the recipient adds the signature, digitally signed messages will not be validated, nor will the recipient be able to read encrypted messages from you.

Message Encryption

Where the possibility of interception exists (whether someone intercepts your message before it reaches the intended recipient or someone else at the recipient's end tries to read the message), Outlook message encryption can help you keep prying eyes away from sensitive messages. This feature also relies on your digital signature to encrypt the message and to allow the recipient to decrypt and read the message. Someone who receives the message without first having the public key portion of your certificate installed on his or her system will see a garbled message.

To learn how to obtain a certificate and use it to encrypt your outgoing messages, as well as how to read encrypted messages you receive from others, see "Encrypting Messages," page 354.

newfeature! Security Labels

The security labels feature in this version of Outlook relies on security policies in Windows 2000 (and is therefore supported only on clients running Windows 2000). Security labels let you add additional security information, such as message sensitivity, to a message header. You can also use security labels to restrict which recipients can open, forward, or send a specific message. Security labels therefore provide a quick indicator of a message's sensitivity and control over the actions that others can take with a message.

newfeature! Understanding Outlook Service Options

If you've been using an earlier version of Outlook, you're probably familiar with Outlook's service options. Earlier versions of Outlook supported three service options: No Mail, Internet Mail Only (IMO), and Corporate/Workgroup (C/W). Outlook 2002 changes that with a new *unified mode*. Outlook unified mode refers to the integration of mail services in Outlook, which allows you to configure and use multiple services in a single profile. This means that you can use Exchange Server, POP3, IMAP, and Hotmail accounts all in one profile and at the same time.

To learn how to work with profiles and add multiple accounts to a profile, see "Understanding User Profiles," page 44.

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Although Outlook makes a great e-mail client for a wide range of mail services, you might prefer to use only its contact management, scheduling, and other nonmessaging features and to use a different application (such as Outlook Express) for your messaging needs. There is no downside to using Outlook in this configuration, although you should keep in mind that certain features, such as integrated scheduling, rely on Outlook's messaging features. If you need to take advantage of these features, you should switch to using Outlook as your primary messaging application.

Options for Starting Outlook

Office offers several options to control startup, either through command-line switches or other methods. You can choose to have Outlook open forms, turn off the preview pane, select a profile, and perform other tasks automatically when the program starts. The following sections describe some of the options you can specify.

Normal Startup

When you install Outlook, Setup places a Microsoft Outlook icon on the desktop. You can start Outlook normally by double-clicking the icon. You also can start Outlook by using the Start menu (choose Start, Programs, Microsoft Outlook).

When Outlook starts normally and without command-line switches, it prompts you for the profile to use (see Figure 1-16) if more than one exists. The profile contains your account settings and configures Outlook for your e-mail servers, directory services, data files, and other Outlook settings.

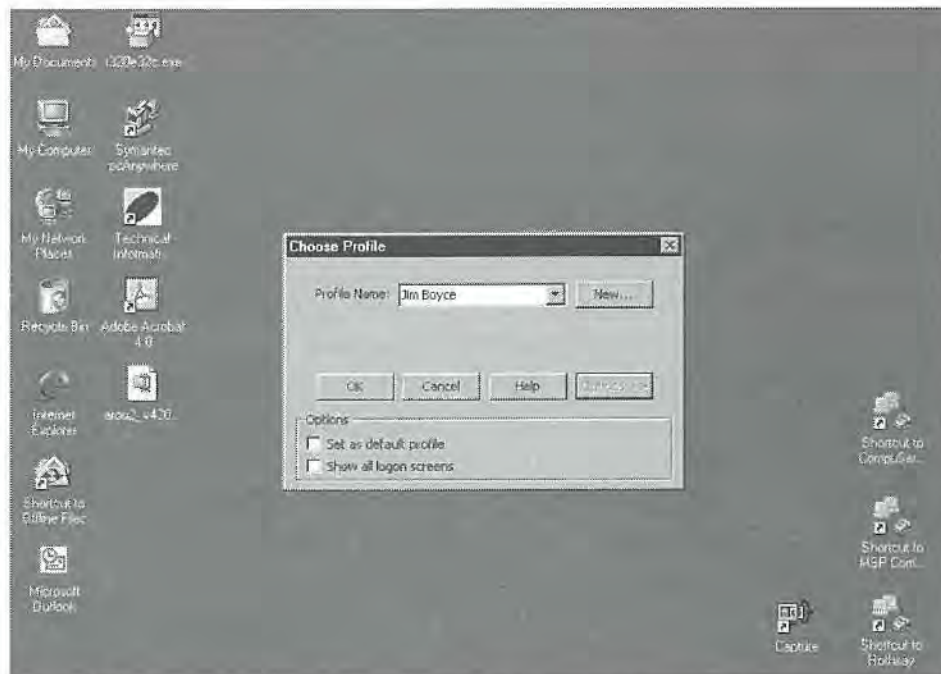


Figure 1-16. Outlook prompts you to choose a profile at startup.

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You can use multiple profiles to maintain multiple identities in Outlook. For example, you might use one profile for your work-related items and a second one for your personal items. To use an existing profile, simply choose it from the drop-down list in the Choose Profile dialog box and click OK. Click New to create a new profile (covered in Chapter 2, "Advanced Setup Tasks"). Click Options to expand the Choose Profile dialog box to include the following options (as shown in Figure 1-16):

- **Set As Default Profile.** Select this option to specify the selected profile as the default profile, which will appear in the drop-down list by default in subsequent Outlook sessions. For example, if you maintain separate personal and work profiles, and your personal profile always appears in the drop-down list, select your work profile and choose this option to make the work profile the default.
- **Show All Logon Screens.** Select this option to have Outlook prompt you for all startup options, including which address book to use; how to display names in the address book; the display name, file name, and password for your local data store; options for individual services such as Exchange Server or the Fax Mail Provider; and personal folders options.

For an in-depth discussion of creating and configuring profiles, see "Understanding User Profiles," page 44. The details of configuring service providers (such as for Exchange Server) are covered in various chapters where appropriate—for example, Chapter 6, "Using Internet Mail," explains how to configure POP3 and IMAP accounts; and Chapter 32, "Configuring the Exchange Server Client," explains how to configure Exchange Server accounts.

newfeature!

Safe Mode Startup

Safe mode is a new startup mode available in Outlook 2002 and the other Microsoft Office XP applications. Safe mode makes it possible for Office applications to automatically recover from specific errors during startup, such as a problem with an add-in or a corrupt registry. Safe mode allows Outlook to detect the problem and either correct it or bypass it by isolating the source.

When Outlook starts automatically in safe mode, you see a dialog box that displays the source of the problem and asks whether you want to continue to open the program, bypassing the problem source, or try to restart the program again. If you direct Outlook to continue starting, the problem items are disabled, and you can view them in the Disabled Items dialog box (see Figure 1-17 on the next page). To open this dialog box, choose Help, About Microsoft Outlook, and click Disabled Items. To enable a disabled item, select the item and click Enable.

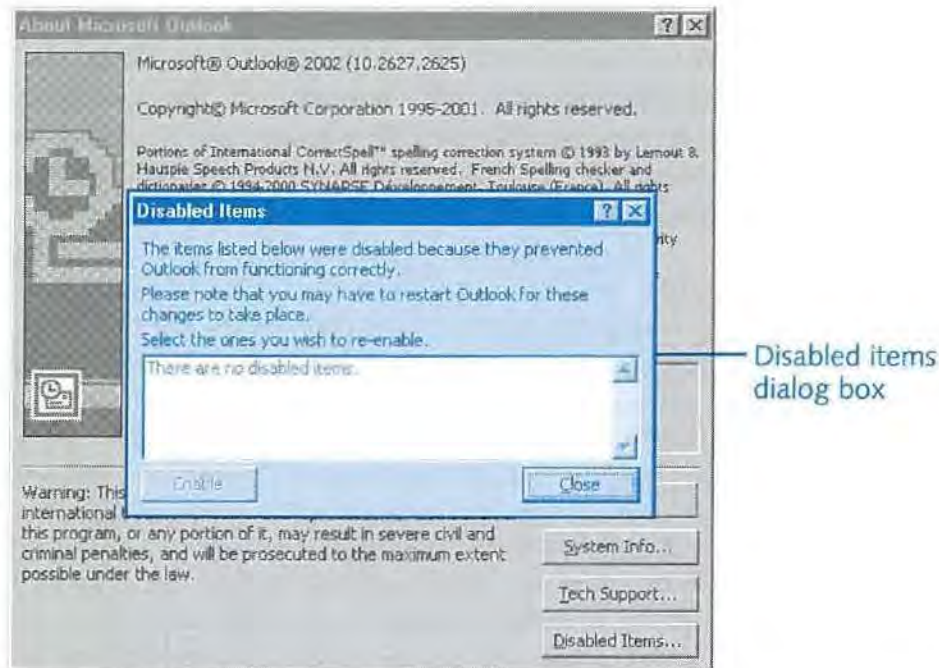


Figure 1-17. Use the Disabled Items dialog box to review and enable items.

In certain situations, you might want to force Outlook into safe mode when it would otherwise start normally—for example, if you want to prevent add-ins from loading or prevent customized toolbars or command bars from loading. To start Outlook (or any other Office application) in safe mode, hold down the Ctrl key and start the program. Outlook detects the Ctrl key and asks whether you want to start Outlook in safe mode. Click Yes to start in safe mode or No to start normally.

If you start an application in safe mode, you will not be able to perform certain actions in the application. The following is a summary (not all of which apply to Outlook):

- Templates can't be saved.
- The last used Web page is not loaded (FrontPage).
- Customized toolbars and command bars are not opened. Customizations that you make in safe mode can't be changed.
- The AutoCorrect list isn't loaded, nor can changes you make to AutoCorrect in safe mode be saved.
- Recovered documents are not opened automatically.
- No smart tags are loaded, and new smart tags can't be saved.
- Command-line options other than /a and /n are ignored.
- You can't save files to the Alternate Startup Directory.

- You can't save preferences.
- Additional features and programs (such as add-ins) do not load automatically.

To start Outlook normally, simply shut down the program and start it again without pressing the Ctrl key.

Starting Outlook Automatically

If you're like most Office users, you work in Outlook a majority of the time. Because Outlook is such an important aspect of your work day, you probably want it to start automatically when you log on to your computer, saving you the trouble of starting it later. Although you have a few options for starting Outlook automatically, the best solution is to place a shortcut to Outlook in your Startup folder.

Follow these steps to start Outlook automatically in Windows 98 and Windows 2000:

- 1 Close or minimize all windows on the desktop.
- 2 Locate the Microsoft Outlook icon on the desktop, and drag it to the Start button. Don't release the mouse button.
- 3 Hold the pointer over the Start menu until it opens; then, while continuing to hold down the mouse button, open the Programs menu and then the Startup menu.
- 4 Place the cursor on the Startup menu and release the mouse button. Windows informs you that you can't move the item and asks whether you want to create a shortcut. Click Yes.

tip Create a new Outlook shortcut

If you don't have a Microsoft Outlook icon on the desktop, you can use the Outlook executable to create a shortcut. Open Windows Explorer and browse to the folder \Program Files\Microsoft Office\Office10. Create a shortcut to the executable Outlook.exe. Note that the default syntax for the standard Microsoft Outlook shortcut is "C:\Program Files\Microsoft Office\Office10\Outlook.exe" /recycle. For an explanation of the /recycle switch and other Outlook startup options, see "Startup Switches," page 35.

You can use the following procedure to accomplish the same task in Windows 95 and Windows NT:

- 1 Right-click an empty area of the taskbar, and choose Properties.
- 2 Click the Advanced tab, and then click Advanced.

Part 1: Working with Outlook

- 3 In the resulting Windows Explorer window, open the Startup folder.
- 4 Using the right mouse button, drag the Microsoft Outlook icon from the desktop to the Startup folder, release it, and choose Create Shortcut(s) Here.
- 5 Close the Windows Explorer window and the taskbar dialog box.

tip Change Outlook's shortcut properties

If you want to change the way Outlook starts from the shortcut in your Startup folder (for example, you might want to add command switches), you need only change the shortcut's properties. For details, see "Changing the Outlook Shortcut," below.

Adding Outlook to the Quick Launch Bar

The Quick Launch bar appears by default on the taskbar just to the right of the Start menu. Quick Launch, as its name implies, gives you a way to easily and quickly start applications—just click the application's icon. By default, the Quick Launch bar includes the Show Desktop icon, as well as the Internet Explorer and Outlook Express icons (if Outlook Express is installed). Quick Launch offers easier application launching because you don't have to navigate the Start menu to start an application.

Adding a shortcut to the Quick Launch bar is easy:

- 1 Minimize all windows so that you can see the desktop.
- 2 Using the right mouse button, drag the Microsoft Outlook icon to the Quick Launch area of the taskbar and then release it.
- 3 Choose Create Shortcut(s) Here.

note You can also left-drag the Microsoft Outlook icon to the Quick Launch bar. Windows will inform you that you can't copy or move the item to that location and will ask whether you want to create a shortcut instead. Click Yes to create the shortcut or No to cancel.

Changing the Outlook Shortcut

Let's assume that you've created a shortcut to Outlook on your Quick Launch bar or in another location so that you can start Outlook quickly. Why change the shortcut? By adding switches to the command that starts Outlook, you can customize the way the application starts and functions for the current session. You can also control Outlook's startup window state (normal, minimized, maximized) through the shortcut's properties. For example, you might want Outlook to start automatically when you log on, but you want it to start minimized. In this situation, you would create a shortcut to Outlook in your Startup folder and then modify the shortcut so that Outlook starts minimized.

To change the properties for a shortcut, first locate the shortcut, right-click its icon, and choose Properties. You should see a dialog box similar to the one shown in Figure 1-18.

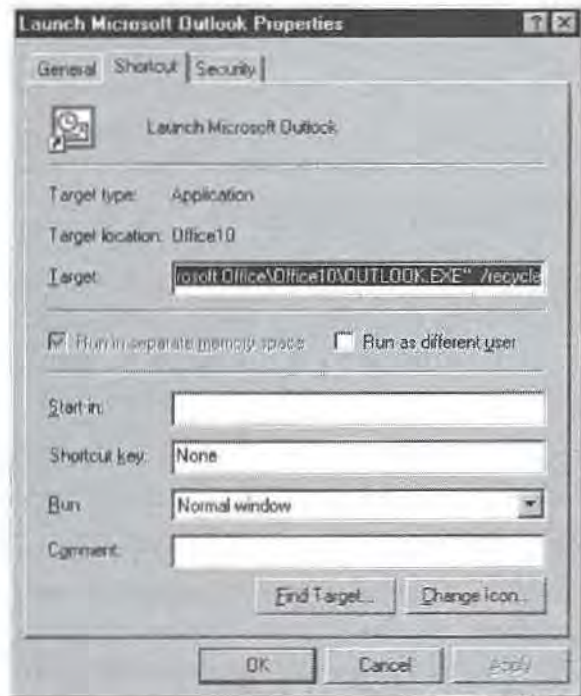


Figure 1-18. A typical Properties dialog box for an Outlook shortcut.

The following list summarizes the options on the Shortcut tab of the Properties dialog box (some of which do not appear in Windows 9x):

- **Target Type.** This read-only property specifies the type for the shortcut's target, which in the example shown in Figure 1-18 is Application.
- **Target Location.** This read-only property specifies the directory location of the target executable.
- **Target.** This property specifies the command to execute when the shortcut is executed. The default Outlook command is "C:\Program Files\Microsoft Office\Office10\Outlook.exe" /recycle. The path could vary if you have installed Office in a different folder. The path to the executable must be enclosed in quotes, and any additional switches must be added to the right, outside the quotes. See "Startup Switches," page 35, to learn about additional switches you can use to start Outlook.
- **Run In Separate Memory Space.** This option is selected by default and can't be changed for Outlook. All 32-bit applications run in a separate memory space. This provides crash protection for other applications and for the operating system.
- **Run As Different User.** Select this option to run Outlook in a different user context, which lets you start Outlook with a different user account

Part 1: Working with Outlook

from the one you used to log on to the computer. Windows will prompt you for the user name and password when you execute the shortcut.

tip You also can use the RUNAS command from a command console (Windows NT and Windows 2000) to start an application in a different user context. For additional information, see the following section, "Use RUNAS to Change User Context."

- **Start In.** This property specifies the startup directory for the application.
- **Shortcut Key.** Use this property to assign a shortcut key to the shortcut, which will allow you to start Outlook by pressing the key combination. Simply click in the Shortcut Key box and press the keystroke to assign it to the shortcut.
- **Run.** Use this property to specify the startup window state for Outlook. You can choose Normal Window, Minimized, or Maximized.
- **Comment.** Use this property to specify an optional comment. The comment appears in the shortcut's ToolTip when you rest the pointer over the shortcut's icon. For example, if you use the Run As Different User option, you might include mention of that in the Comment box to help you distinguish this shortcut from another that launches Outlook in the default context.
- **Find Target.** Click this button to open the folder containing the Outlook.exe executable file.
- **Change Icon.** Click this button to change the icon assigned to the shortcut. By default, the icon comes from the Outlook.exe executable, which contains other icons you can assign to the shortcut. You also can use other ICO, EXE, and DLL files to assign icons. You'll find several additional icons in Moricons.dll and Shell32.dll, both located either in the Windows folder or in the %systemroot%\System32 folder (Windows NT and Windows 2000).

When you're satisfied with the shortcut's properties, click OK to close the dialog box.

Use RUNAS to Change User Context

As explained in the preceding section, you can use the option Run As Different User in a shortcut's Properties dialog box to run the target application in a different user context from the one you used to log on to the system. This option is applicable on systems running Windows NT and Windows 2000 but not on those running Windows 9x or Windows Me.

Chapter 1: Outlook Architecture, Setup, and Startup

You can also use the RUNAS command from a command console in Windows NT and Windows 2000 to run a command—including Outlook—in a different user context. The syntax for RUNAS is

```
RUNAS [/profile] [/env] [/netonly] /user:<UserName> program
```

The parameters for RUNAS can be summarized as follows:

- **/profile** Use this parameter to indicate the profile for the specified user if that profile needs to be loaded.
- **/env** Use the current user environment instead of the one specified by the user's profile.
- **/netonly** Use this parameter if the specified user credentials are for remote access only.
- **/user:<UserName>** Use this parameter to specify the user account under which you want the application to be run.
- **Program** This parameter specifies the application to execute.

Following is an example of the RUNAS command used to start Outlook in the Administrator context of the domain ADMIN. (Note that the command should be on one line on your screen.):

```
RUNAS /profile /user:admin\administrator  
""C:\Program Files\Microsoft Office  
\Office10\Outlook.exe" /recycle"
```

It might seem like a lot of trouble to type all that at the command prompt, and that's usually the case. Although you can use RUNAS from the command console to run Outlook in a specific user context, it's generally more useful to use RUNAS in a batch file to start Outlook in a given, predetermined user context. For example, you might create a batch file containing the sample RUNAS syntax just noted and then create a shortcut to that batch file so that you can execute it easily without having to type the command each time.

Startup Switches

Microsoft Outlook supports a number of command-line switches that modify the way the program starts and functions. Although you can issue the Outlook.exe command with switches from a command prompt, it's generally more useful to specify switches through a shortcut, particularly if you want to use the same set of switches more than once. Table 1-1 on the next page lists the startup switches you can use to modify the way Outlook starts and functions.

For an explanation of how to modify a shortcut to add command-line switches, see "Changing the Outlook Shortcut," page 32.

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Table 1-1. Startup switches and their purposes

Switch	Purpose
/a <filename>	Open a message form with the attachment specified by <filename>
/c ipm.activity	Open the journal entry form by itself
/c ipm.appointment	Open the appointment form by itself
/c ipm.contact	Open the contact form by itself
/c ipm.note	Open the message form by itself
/c ipm.post	Open the discussion form by itself
/c ipm.stickynote	Open the note form by itself
/c ipm.task	Open the task form by itself
/c <class>	Create an item using the message class specified by <class>
/CheckClient	Perform a check to see whether Outlook is the default application for e-mail, news, and contacts
/CleanFreeBusy	Regenerate free/busy schedule data
/CleanReminders	Regenerate reminders
/CleanSchedPlus	Delete Schedule+ data from the server and enable free/busy data from the Outlook calendar to be used by Schedule+ users
/CleanViews	Restore the default Outlook views
/Folder	Hide the Outlook Bar and folder list if displayed in the previous session
/NoPreview	Hide the preview pane and remove Preview Pane from the View menu
/Profiles	Display the Choose Profile dialog box even if Always Use This Profile is selected in profile options
/Profile <name>	Automatically use the profile specified by <name>
/Recycle	Start Outlook using an existing Outlook window if one exists
/ResetFolders	Restore missing folders in the default message store
/ResetOutlookBar	Rebuild the Outlook Bar
/select <folder>	Display the folder specified by <folder>

Choosing a Startup View

When you start Outlook, it defaults to using Outlook Today view (see Figure 1-19), but you might prefer to use a different view or folder as the initial view. For example, if you use Outlook primarily as an e-mail client, you'll probably want Outlook to start in the Inbox. If you use Outlook mainly to manage contacts, you'll probably want it to start in the Contacts folder.

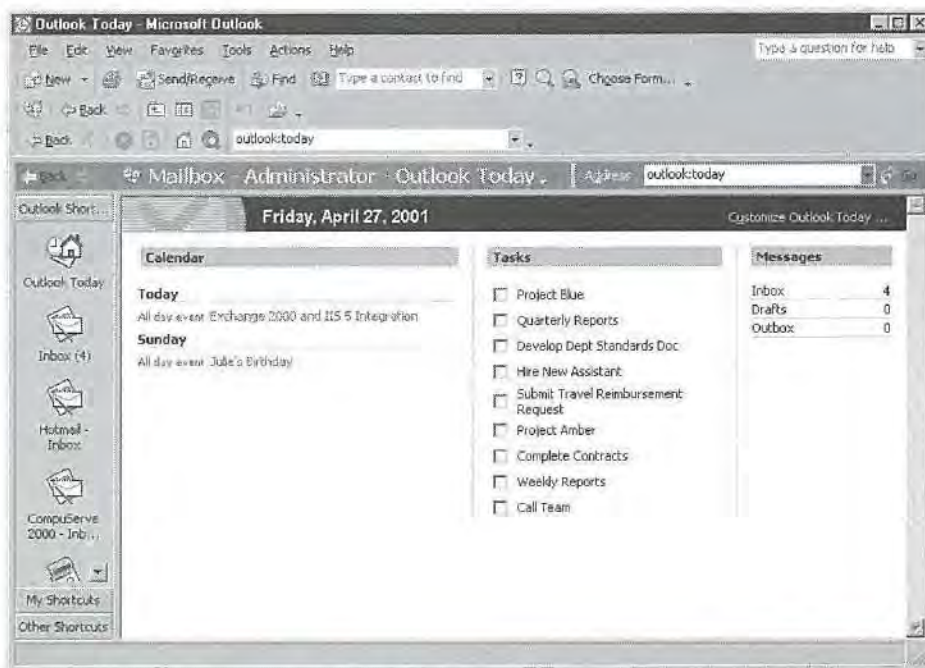


Figure 1-19. Outlook Today is the default view.

To specify the view that should appear when Outlook first starts, follow these steps:

- 1 Open Outlook and choose Tools, Options.
- 2 Click the Other tab and then click Advanced Options (see Figure 1-20).

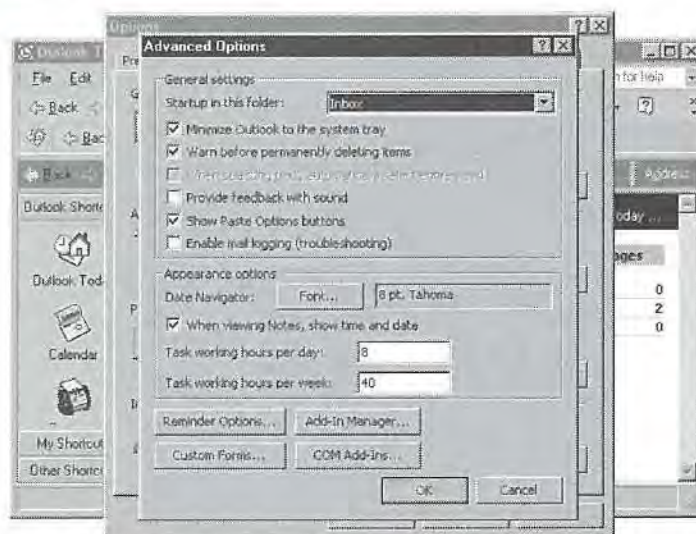


Figure 1-20. Use the Advanced Options dialog box to specify the startup view.

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- 3** From the Startup In This Folder drop-down list, choose the folder you want Outlook to open at startup.
- 4** Click OK and then close the dialog box.

If you switch Outlook to a different default folder and then want to restore Outlook Today as your default view, you can follow the previous steps to restore Outlook Today as the default.

Simply select Outlook Today from the drop-down list or follow these steps with the Outlook Today window open:

- 1** Open Outlook and open Outlook Today view.
- 2** Click Customize Outlook Today at the top of the Outlook Today window.
- 3** On the resulting page, select When Starting Go Directly To Outlook Today and then click Save Changes.

Chapter 2

Advanced Setup Tasks

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Because Microsoft Outlook has so many features, configuring the program—particularly for first-time or inexperienced users—can be a real challenge. However, after you master the basic concepts and experiment with the configuration process, it quickly becomes second nature.

This chapter examines Outlook setup issues, including what you see the first time you start Outlook and how to use the E-Mail Accounts Wizard to create, modify, and test e-mail accounts. You'll also learn about user profiles, including how to create and modify them, how to use multiple profiles for different identities, how to copy profiles, and how to configure profile properties.

After you have a solid understanding of profiles, you're ready to tackle configuring the many e-mail and data file services Outlook offers. This chapter discusses configuring both online and offline storage and will help you add, modify, and remove personal message stores (personal folders) for a profile.

In addition, the chapter explains how to configure Outlook to maintain an offline copy of your Microsoft Exchange Server mailbox and folders so that you can work with your account while disconnected from the network. You'll also learn how to change the storage location for your data and how to set options to control mail delivery.

Starting Outlook for the First Time

The first time you run Outlook after a fresh installation (as opposed to an upgrade of an earlier version of Outlook), Outlook runs the Outlook 2002 Startup Wizard. The wizard

Part 1: Working with Outlook

steps you through the process of setting up e-mail accounts and *data stores* (the files used to store your Outlook data). When you've completed all the steps, Outlook opens, as shown in Figure 2-1. Note that Outlook 2002 doesn't add a welcome message to your Inbox, as it did in previous versions. Outlook configures the Outlook Bar based on the selections you made in the wizard.

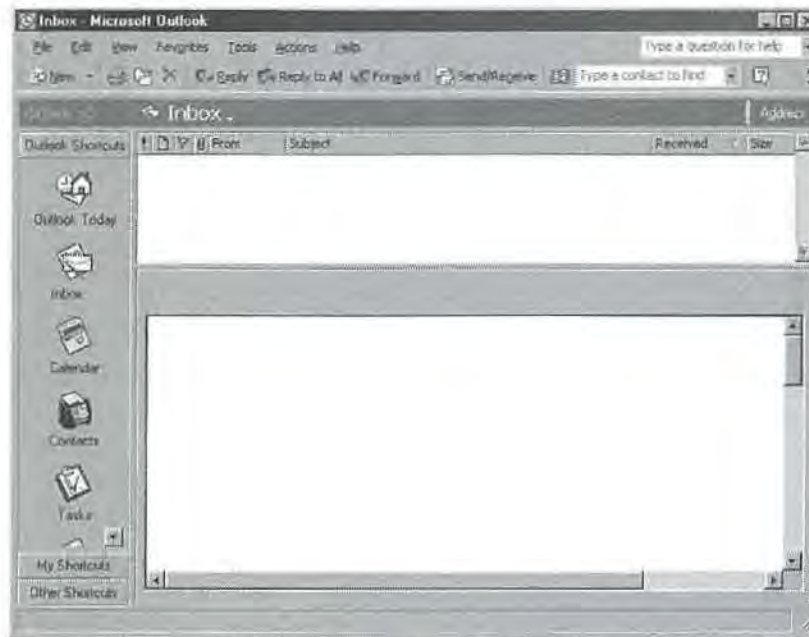


Figure 2-1. Here's what you'll see at first startup after a clean installation.

The Startup Wizard is the same wizard you use to configure e-mail accounts after Outlook is installed. For that reason, you'll encounter this wizard again in the following section.

If you upgraded Outlook over a previous version, Outlook automatically migrates your accounts, preferences, and data the first time you run it. This means you don't have to perform any other tasks before working with Outlook 2002, unless you want to add other accounts or take advantage of features not provided by your current profile settings. In the following section, you'll learn how to add other services and accounts to your current Outlook profile.

newfeature!

Configuring Accounts and Services

Outlook 2002 provides a wizard to help simplify setup and configuration of e-mail accounts, data stores, and directory services. You use the same Startup Wizard that installs Outlook to add new e-mail accounts. When you start Outlook for the first time after a clean installation (that is, not an upgrade), Outlook runs the wizard automatically.

Follow these steps to get started setting up e-mail accounts:

- 1 Start Outlook. When the Outlook 2002 Startup Wizard appears, click Next.

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- 2 On the E-Mail Accounts page, click Yes, indicating that you want to set up an e-mail account, and then click Next. The wizard displays the Server Type page (see Figure 2-2).
- 3 Select the type of e-mail service for which you want to add an account and click Next.

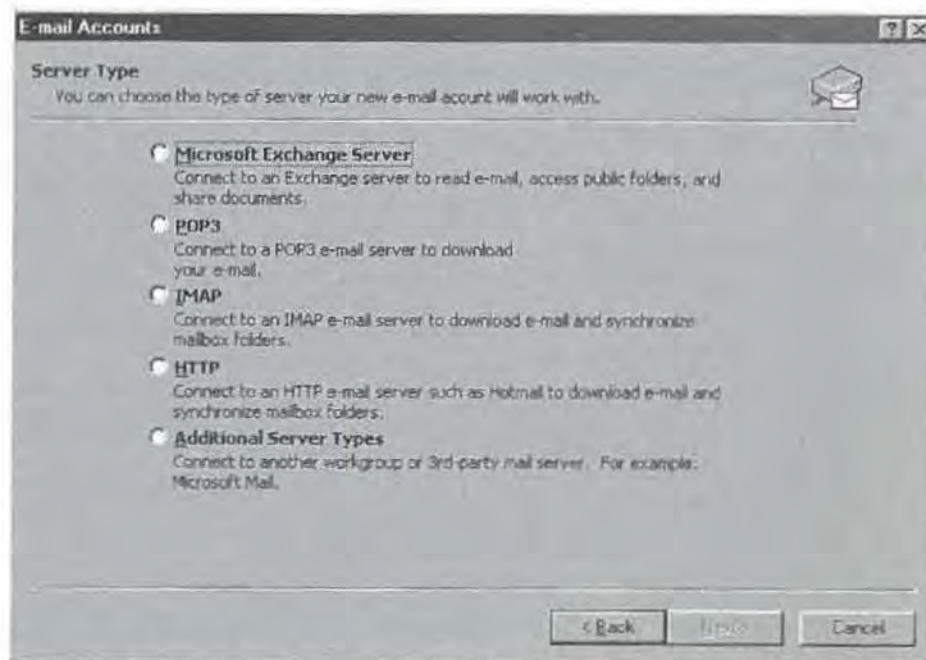


Figure 2-2. Select the type of server for the e-mail account you want to add.

For a discussion of user profiles and how Outlook uses them to store your account settings, see "Understanding User Profiles," page 44.

The action the wizard takes at this point depends on the type of account you select. Rather than cover account configuration here outside the context of using each type of account, this book covers the specifics of each account type in the associated chapter. The following list will help you locate the appropriate chapter and section:

- **Exchange Server.** See Chapter 32, "Configuring the Exchange Server Client."
- **Internet Mail (POP3).** See "Using Internet POP3 E-Mail Accounts," page 154.
- **IMAP.** See "Using IMAP Accounts," page 161.
- **HTTP (including Hotmail and others).** See "Using Hotmail and Other HTTP-Based Services," page 165.
- **CompuServe.** See "Using Outlook with CompuServe," page 163 (includes CompuServe Classic and CompuServe 2000).
- **Fax Transport.** See "The Native Windows Fax Service," page 261.

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You can easily add an e-mail account to your Outlook profile after Outlook is installed. Follow these steps to do so:

- 1 Right-click the Outlook icon on the desktop, choose Properties, and then click E-Mail Accounts. Or, with Outlook open, choose Tools, E-Mail Accounts to display the E-Mail Accounts Wizard, shown in Figure 2-3.

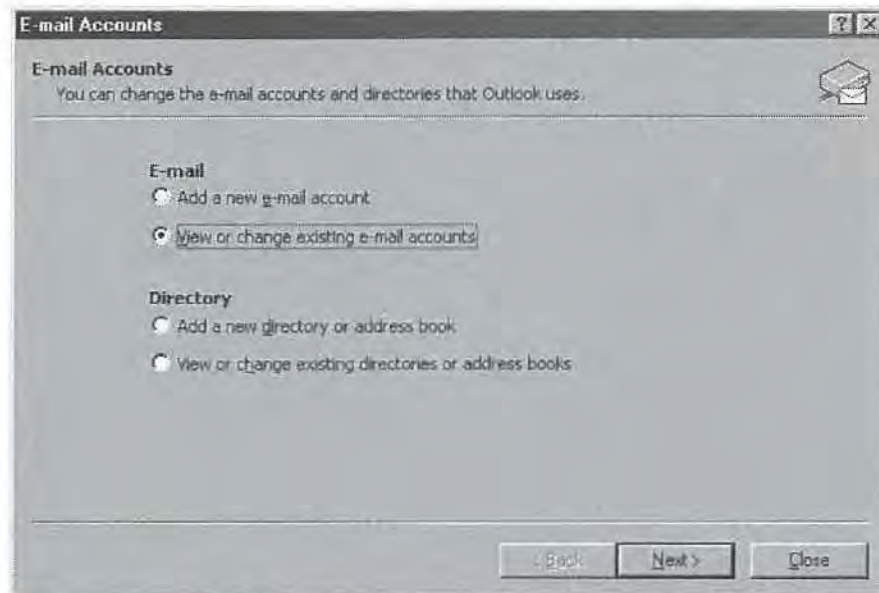


Figure 2-3. Outlook provides a wizard for adding and modifying accounts.

note If your system includes multiple profiles, select the one to which you want to add accounts. Right-click the Outlook icon on the desktop and choose Properties. Click Show Profiles, locate and select your profile, and click Properties. Then select E-Mail Accounts.

- 2 Select Add A New E-Mail Account and click Next if you want to add an account. Select View Or Change Existing E-Mail Accounts to modify existing accounts.
- 3 Select the type of e-mail service to add and click Next. (As noted on the previous page, you can refer to other chapters for information about configuring specific account types.)

newfeature!

Testing Your E-Mail Account

Outlook offers a new feature to help you set up your e-mail account. You can now test the new account while you create it, rather than setting it up first and testing later. This helps you quickly identify problems with the account settings, such as an incorrect password or the wrong Domain Name System (DNS) name specified for the incoming or outgoing server.

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When you run the E-Mail Accounts Wizard, enter the settings for the account on the Settings page (see Figure 2-4). Then click Test Account Settings. Outlook locates the incoming and outgoing mail servers, logs on to the incoming mail server, and sends a test message (see Figure 2-5). If all steps are completed successfully, your account settings are correct. Difficulty with a particular step will help you identify problems with your settings, a connectivity problem, and so on. Although Outlook doesn't start a troubleshooter for you or recommend a fix, specific types of difficulties point to certain common problems. For example, if Outlook indicates that it can't find your e-mail server, the most likely problem is that you have specified the wrong DNS name (assuming that your Internet or intranet connection is working).

E-mail Accounts

Internet E-mail Settings (POP3)
Each of these settings are required to get your e-mail account working.

User Information
Your Name:
E-mail Address:

Server Information
Incoming mail server (POP3):
Outgoing mail server (SMTP):

Logon Information
User Name:
Password:
☒ Remember password
☐ Log on using Secure Password Authentication (SPA)

Test Settings
After filling out the information on this screen, we recommend you test your account by clicking the button below. (Requires network connection)

Figure 2-4. Click Test Account Settings when setting up a new account to test the account.

Test Account Settings
Outlook is testing the account settings you entered.

Tasks | Errors

Tasks	Status
✓ Establish network connection	Completed
▶ Find outgoing mail server (SMTP)	In Progress
✗ Find incoming mail server (POP3)	Failed
✗ Log onto incoming mail server (POP3)	Failed
✗ Send test e-mail message	Failed

Figure 2-5. Outlook performs several tasks to check your account settings.

Troubleshooting

Outlook can't find your e-mail server.

If Outlook can't seem to locate your e-mail server, you can check a handful of settings to determine the problem. First, make sure your computer is connected to the network or the Internet, depending on where the server is located. If you're specifying a server on the Internet, make sure you have specified the correct, fully qualified domain name (FQDN) of the server, such as mail.proseware.tld. If you specify the correct name but Outlook still can't find the server, try pinging the server by name. Open a command console and type the following command where *<server>* is the FQDN of the server:

```
PING <server>
```

If this results in an *unknown host* error, it's likely that DNS is not configured or working properly on your computer. Check the DNS settings for your TCP/IP protocol to make sure you are specifying the correct DNS server. If you know the IP address of the server, ping the address. If you are able to ping, you definitely have a DNS problem or are specifying the wrong DNS name. If the ping fails, you have a network connectivity or TCP/IP stack problem. At this point, it would be best to consult your network support staff. Your configuration will need to be verified (and changed, if an incorrect value has been specified). If you have faulty hardware, it will need to be replaced.

Understanding User Profiles

In Outlook, *user profiles* store the configuration of e-mail accounts, data files, and other settings you use in a given Outlook session. For example, your profile might include an Exchange Server account, an Internet mail account, and a set of personal folders. Outlook either prompts you to select a profile at startup or selects one automatically, depending on how you've configured it.

In most cases, you'll probably use only one profile and will configure Outlook to select it automatically. In some situations, however, multiple profiles can be useful. For example, you might prefer to keep your work and personal data completely separate on your notebook computer because of privacy concerns or office policies. In this situation, you maintain two profiles: one for your work data and a second for your personal data. You then configure Outlook to prompt you to choose a profile at startup. Choosing the profile controls which set of data files and configuration settings to use for that specific session. For example, when you're working at the office, you use the office profile—and when you're using the computer at home, you use the personal profile.

It's important to understand that Outlook profiles have no relationship to the other types of profiles you'll find in a Microsoft Windows operating system, which include *hardware profiles* and *user profiles*. Hardware profiles store hardware settings and allow

Chapter 2: Advanced Setup Tasks

you to switch between different hardware configurations without having to reconfigure your system. User profiles store the unique working environment (Desktop, My Documents, and so on) that you see when you log on to your computer. Outlook profiles, in contrast, apply only to Outlook.

note Unless otherwise noted, the term *profile* in this book refers to an Outlook profile.

Each profile can contain multiple accounts and services, which means you can work with different e-mail servers at one time and use multiple sets of data files (such as a personal folders, or PST, file). The following list describes the items stored in an Outlook profile:

- **Services.** These include e-mail accounts and data files, along with their settings. For example, your profile might include an Exchange Server account, two Internet e-mail accounts, a PST file, and a directory service account. When these accounts are in a single profile, you can use all of them in the same Outlook session.
- **Delivery settings.** The profile specifies the store to which Outlook should deliver new mail when it arrives. With the exception of Internet Access Message Protocol (IMAP) accounts, which use their own PST files, all accounts use the same store location. You also can specify the order in which Outlook processes accounts.

To learn how to configure these delivery properties for a given profile, see “Setting Delivery Options,” page 55.

- **Address settings.** You can specify which address book Outlook displays first; specify where Outlook should store personal addresses; and specify the order of the address books Outlook uses to check e-mail addresses when the profile includes multiple address books. In earlier versions of Outlook, you accessed these settings through the profile properties, but in Outlook 2002 you configure addressing in the Address Book window.

For detailed information on configuring and using address books in Outlook, see Chapter 5, “Managing Address Books and Distribution Lists.”

The first time you run Outlook, it creates a profile called Outlook if you don’t add any e-mail accounts to the profile. If you do add an e-mail account, Outlook uses the name you specify in the account settings as the name for the profile.

As explained previously, you can use multiple profiles. The following sections explain how to create new profiles, copy existing profiles to new profiles, and perform related operations.

Creating Profiles

You don't have to be in Outlook to create a profile; in fact, you can't create one in Outlook. You create profiles from the desktop or via Control Panel. In addition to specifying a profile name, you can also (optionally) add e-mail and other services to the profile. You can create a profile from scratch or copy an existing profile to create a new one.

Creating a Profile from Scratch

When you have no existing Outlook profile or no profile that contains the accounts or settings you need, you must create a profile from scratch.

Follow these steps to create a new profile:

- 1 On the desktop, right-click the Outlook icon and choose Properties. Alternatively, open Control Panel and double-click the Mail icon.
- 2 In the Mail Setup dialog box (shown in Figure 2-6), click Show Profiles.

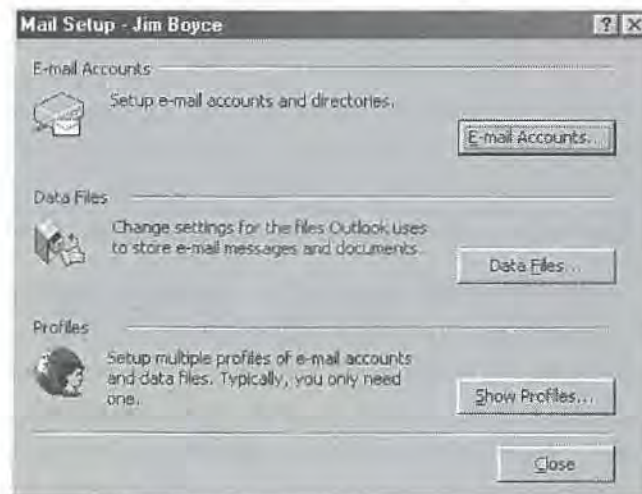


Figure 2-6. You access the current profile's settings as well as other profiles through the Mail Setup dialog box.

- 3 Click Add, specify a name for the profile in the New Profile dialog box, and click OK.
- 4 The E-Mail Accounts Wizard starts. Add accounts and other services to the profile. To create a new profile without adding any services (useful if you are not using Outlook for e-mail), click Close. In this situation, Outlook automatically creates a set of personal folders (a PST file) to store your Outlook data.

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Copying a Profile

In addition to creating profiles from scratch, you can also copy an existing profile to create a new one. When you copy a profile, Outlook copies all the settings from the existing profile to the new one, including accounts and data files.

Follow these steps to copy an existing profile:

- 1 On the desktop, right-click the Outlook icon and choose Properties. Alternatively, open Control Panel and double-click the Mail icon.
- 2 In the Mail Setup dialog box, click Show Profiles.
- 3 Select the existing profile that you want to use as the basis for the new profile and then click Copy.
- 4 In the Copy Profile dialog box, specify a name for the new profile and click OK.

Modifying or Removing a Profile

You can modify a profile at any time in order to add or remove services. You can also remove a profile altogether if you no longer need it.

Follow these steps to modify or remove an existing profile:

- 1 On the desktop, right-click the Outlook icon and choose Properties. Alternatively, open Control Panel and double-click the Mail icon.
- 2 In the Mail Setup dialog box, click Show Profiles.
- 3 Select the profile to be modified or removed.
- 4 Click Remove if you want to remove the profile, or click Properties to modify its settings.

Switching Profiles

You can configure Outlook either to use a specific profile automatically or to prompt you to select a profile at startup. If you want to change profiles, you need to exit Outlook and restart, selecting the appropriate profile.

Follow these steps to specify the default profile and use it automatically when Outlook starts:

- 1 On the desktop, right-click the Outlook icon and choose Properties. Alternatively, open Control Panel and double-click the Mail icon.
- 2 In the Mail Setup dialog box, click Show Profiles.

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- 3 On the General tab (shown in Figure 2-7), select Always Use This Profile. In the drop-down list, select the default profile you want Outlook to use.
- 4 Click OK.



Figure 2-7. You can specify a default profile on the General tab.

Specifying the Startup Profile

If you work with multiple profiles and switch relatively often, you'll probably want to configure Outlook to prompt you to choose a profile at startup. This saves you the trouble of changing the default profile each time you want to switch. For example, assume that you use one profile for your personal accounts and another for your work accounts. Have Outlook prompt you for the profile when the program starts, rather than configuring the settings each time to specify the default profile.

Follow these steps to configure Outlook to prompt you to choose a profile:

- 1 On the desktop, right-click the Outlook icon and choose Properties. Alternatively, open Control Panel and double-click the Mail icon.
- 2 In the Mail Setup dialog box, click Show Profiles.
- 3 Select Always Use This Profile, select the profile you want Outlook to display as the initial selection in the list, and then select Prompt For A Profile To Be Used.
- 4 Click OK.

Chapter 2: Advanced Setup Tasks

tip Set the initial profile

You probably noticed in step 3 that you enabled an option and then immediately disabled it by selecting Prompt For A Profile To Be Used. In effect, you're accomplishing two tasks: setting the default profile and also configuring Outlook to prompt you for a profile. In the drop-down list, select the profile you use most often, which will save you the effort of selecting it when prompted at startup.

Configuring Online and Offline Data Storage

The previous section explained how to add e-mail account services and discussed data stores. This section provides a more detailed look at storage options in Outlook and how to configure those options.

Like earlier versions of Outlook, Outlook 2002 offers three options for storing data: your Exchange Server mailbox, PST files, and Offline Folder (OST) files. A store holds your Outlook data, including your Contacts, Calendar, and other folders. You can have only one default store. This means your e-mail, contacts, schedule, tasks, and other information are all stored in the same set of folders. Outlook directs all incoming e-mail to your default store. The single exception to this is an IMAP account, which stores its e-mail folders and messages separately from your other data.

For detailed information on configuring and using IMAP accounts and how Outlook stores IMAP folders and messages, see "Using IMAP Accounts," page 161.

Although you can have only one default store, you can add other store files to a profile. You can use the other stores to organize or archive your data. For example, if you have a profile with an Exchange Server account and a POP3 account, the profile might be configured to deliver all mail to the Exchange Server mailbox. You might want to add another set of folders that you can use to separate your Internet mail from your

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workgroup mail, or perhaps you want to use a different store to separate your personal messages from your work-related messages. Another use for a second store file is to share data with others without exposing your default store. Whatever the situation, you need to decide which type of store is most appropriate for your default store as well as for your additional stores.

Personal Folders and Offline Folders

A PST file in Outlook 2002 is the same as the default store type in Outlook 97, 98, and 2000. You can password-protect PST files for greater security, although utilities available on the Web can bypass the password security. PST files offer encryption, providing an additional level of security. PST files do not have a built-in capability for synchronization with an Exchange Server mailbox, although you can work offline if the PST rather than the Exchange Server mailbox is configured as the default store location. If the Exchange Server mailbox is your default store, however (which is recommended), you must use an OST file to work offline.

tip Make your PST available when you're roaming

If you use a roaming Windows profile to provide a common desktop configuration regardless of the computer from which you log on, consider placing the PST (if you use one) on a network share that is available from all your logon locations. This eliminates the need to copy your PST across the network each time you log on, reducing network utilization and speeding logon time.

The format for PST files in this version of Outlook is the same as for Outlook 97, 98, and 2000, which means those systems can share a PST file created with Outlook 2002, and vice versa. This is a significant consideration if you need to share a local data file with other Outlook users who have not yet upgraded to Outlook 2002.

Adding Other Data Stores

While Outlook uses a particular store as your default store to contain your Outlook data and e-mail, you can add other store files to help you organize, separate, or archive your data.

Adding another store is easy. Just follow these steps:

- 1 Right-click the Outlook icon on the desktop, choose Properties, and then click Data Files. (Select the profile first, if necessary.) Or, if Outlook is running, choose Tools, Data File Management. The current storage files are listed in the Outlook Data Files dialog box.
- 2 Click Add, select Personal Folders file, and then click OK.

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- 3 Outlook prompts for the name and location of the file. You can specify a new file or select an existing file to add it to your current profile. Click OK after you specify the file and path.
- 4 Outlook next displays the Create Microsoft Personal Folders dialog box, shown in Figure 2-8. Configure settings as necessary based on the following list:
 - **Name.** Specify the name by which you want the folders to be known in Outlook. This is not the file name for the store file, but you can use the same name for both if you want.
 - **Encryption Setting.** Specify the encryption level for the folder file. Choose No Encryption if you don't want Outlook to encrypt your PST file. Choose Compressible Encryption if you want Outlook to encrypt the file with a format that allows compression to conserve space. Outlook does not compress the file. Instead, you must use the compression capabilities offered by your operating system (such as NTFS compression) or by a third-party application. Choose Best Encryption for highest security. PST files formatted using Best Encryption can be compressed, but not as efficiently as those that use Compressible Encryption.
 - **Password.** Specify an optional password to protect your PST file from access by others.
 - **Save This Password In Your Password List.** Select this option to have Outlook save the password for your PST file in your local password cache. This eliminates the need for you to enter the password each time you open the PST file. Clear this option if you want Outlook to prompt you each time (providing greater security).
- 5 Click OK to close the Create Microsoft Personal Folders dialog box.



Figure 2-8. Use the Create Microsoft Personal Folders dialog box to add a PST file.

tip Securing your PST file

It's possible for others to gain access to your PST file and bypass the password, even if you use a compression option. For best security, keep your sensitive data on the Exchange Server rather than in a PST file. You can also employ NTFS permissions to secure the folder where your PST file is located, granting applicable permissions only to those users who need access to that folder or your PST file.

Removing Data Stores

Occasionally, you might want to remove a data store from a profile—perhaps you've been using a PST file as your primary store and are now moving to an Exchange Server with an OST file for offline use.

To remove a data store from a profile, you use steps similar to those you followed to add a store:

- 1 Right-click the Outlook icon on the desktop, choose Properties, and then click Data Files. (Select the profile first if necessary.) Or, if Outlook is running, choose Tools, Data File Management. The current storage files are listed in the Outlook Data Files dialog box.
- 2 Select the data file to remove from the profile and click Remove; then click Yes to verify the action.
- 3 Click Close and then close the remaining dialog boxes.

When you remove a data file from a profile, Outlook does not delete the file itself. This means you can later add the file back to a profile if you need to access its contents. If you don't need the data stored in the file or if you've already copied the data to a different store, you can delete the file. Open the folder where the file is located and delete it as you would any other file.

Configuring Offline Storage

Configuring an offline store allows you to continue working with data stored in your Exchange Server mailbox when the server is not available (if your computer is disconnected from the network, for example). As soon as the server becomes available again, Outlook synchronizes the data either automatically or manually—according to the way you have configured Outlook.

For a detailed explanation of folder synchronization, see "Controlling Synchronization and Send/Receive Times," page 190.

As in earlier versions of Outlook, Outlook 2002 supports the use of an OST file to serve as an offline cache for Exchange Server. This method is compatible with all versions of Exchange Server, including Exchange Server 2000.

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Using an OST File

You can use an OST file to provide offline capability for your Exchange Server mailbox. You do not need to use a PST file in conjunction with the OST file—the OST file can be your only local store file, if you want. However, you can use other PST store files in addition to your OST file.

note The OST file does not appear as a separate set of folders in Outlook. In effect, the OST file is hidden and Outlook uses it transparently when your computer is offline. For more information, see "Working Offline with Exchange Server," page 859.

Follow these steps to configure offline storage with an OST file:

- 1 Right-click the Outlook icon on the desktop, choose Properties, and then click E-Mail Accounts. If Outlook is running, choose Tools, E-Mail Accounts.
- 2 Select View Or Change Existing E-Mail Accounts and click Next, and then select the Exchange Server account and click Change.
- 3 Click More Settings to display the Microsoft Exchange Server dialog box. Click the Advanced tab, and then click Offline Folder File Settings to open the dialog box shown in Figure 2-9.



Figure 2-9. Specify the file name and other settings for the OST file.

- 4 Specify a path and name for the OST file in the File box, select the encryption setting, and click OK.
- 5 Click OK to close the Offline Folder File Settings dialog box.
- 6 Click Next and then click Finish.

Changing Your Data Storage Location

On occasion, you might need to move a data file from one location to another. For example, perhaps you've been using a local PST file and now want to place that file on a network share for use with a roaming profile, so that you can access the file from any computer on the network.

Moving a PST file is a manual process. You must shut down Outlook, move the file, and then reconfigure the profile accordingly.

Follow these steps to move a PST file:

- 1 Shut down Outlook, right-click the Outlook icon on the desktop, and choose Properties.
- 2 Select a profile if necessary, and then click Data Files to display the Outlook Data Files dialog box (see Figure 2-10).

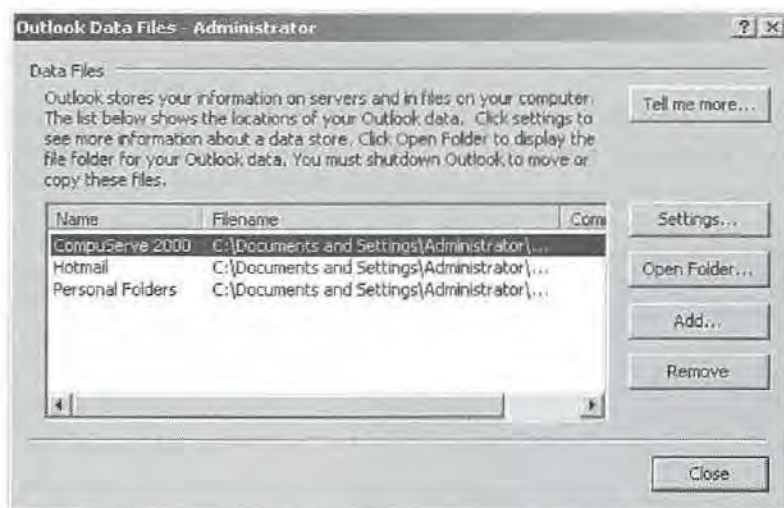


Figure 2-10. Use the Outlook Data Files dialog box to locate the existing PST.

- 3 Select the PST you want to move and click Open Folder. Outlook opens the folder where the PST is located and highlights the file's icon.
- 4 Drag the file or use the clipboard to move the file to the desired location; then close the folder.
- 5 Back in the Outlook Data Files dialog box, click Settings. Click OK at the error message.

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- 6** Browse to the new location of the PST, select it, and click Open; then click OK.
- 7** Click Close to close the Outlook Data Files dialog box; then click Close again to close the Mail Setup dialog box.

newfeature!

Setting Delivery Options

Outlook uses one data store location as the default location for delivering messages and storing your other Outlook items. You can change the store location if needed. You also can specify the order in which Outlook processes e-mail accounts, which determines the server Outlook uses (where multiple servers are available) to process outgoing messages. The order also determines the order in which Outlook checks the servers for new messages.

For example, assume that you have an Exchange Server account and a POP3 account for your personal Internet mail. If the Exchange Server account is listed first, Outlook will send messages destined for Internet addresses through the Exchange Server. In many cases, however, this might not be what you want. For example, you might want all personal mail to go through your POP3 account and work-related mail to go through your Exchange Server account.

You have two ways to change the e-mail service that Outlook uses to send a message: you can configure the service order, or you can specify the account to use when you create the message.

Follow these steps to configure the service order for your e-mail:

- 1** Right-click the Outlook icon on the desktop and choose Properties. Alternatively, with Outlook open, choose Tools, E-Mail Accounts to display the E-Mail Accounts Wizard.
- 2** If your system includes multiple profiles, select the one to which you want to add accounts. Click Show Profiles, locate and select your profile, and click Properties. Then select E-Mail Accounts.
- 3** Click View Or Change Existing E-Mail Accounts and click Next.
- 4** Select accounts and use the Move Up and Move Down buttons to change the order of the accounts in the list (see Figure 2-11 on the next page).
- 5** Click Finish.

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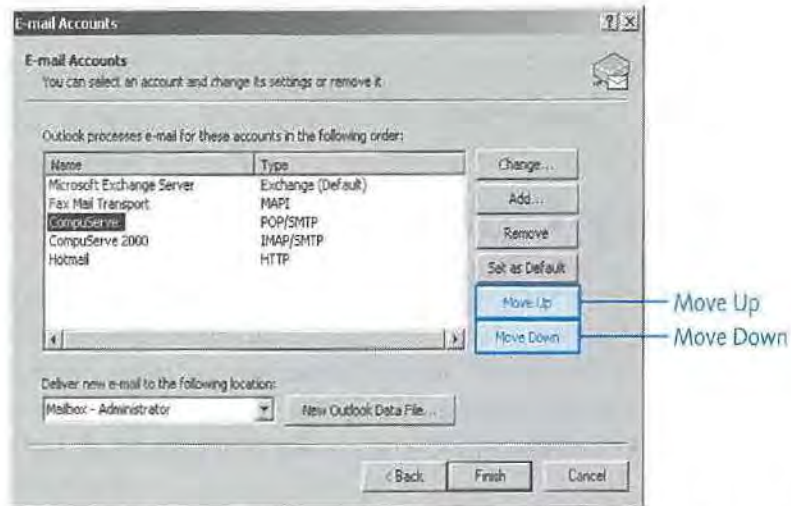


Figure 2-11. Use Move Up and Move Down to configure account order.

When you compose a message, you can override the default e-mail service that Outlook uses to send messages simply by selecting the account before sending the message.

To select the account, follow these steps:

- 1** Compose the message. Before sending it, click the Accounts button on the toolbar.
- 2** Select the account you want to use to send the message, make any other changes to options as needed, and click Send.

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Working in and Configuring Outlook

If you've used earlier versions of Microsoft Outlook, you'll find that the interface in Outlook 2002 hasn't changed that much, and you should have no problem getting started. If you're new to Outlook entirely, however, you need to become familiar with its interface, which is the main focus of this chapter.

Outlook presents your data using different views, and this chapter shows you how to customize the way those views look. The chapter also examines other standard elements of the interface, including toolbars, the Outlook Bar, the folder list, and the preview pane. You'll also learn how to use multiple Outlook windows and views and navigate your way through the Outlook interface.

This chapter looks at the various ways you can configure Outlook, explaining settings that control a broad range of options, from e-mail and spelling to security. In addition, you'll learn about settings in your operating system that affect how Outlook functions. Where appropriate, the text refers you to other chapters where configuration information is discussed in detail in the context of a particular feature or function.

Web access has been expanded and improved in Outlook, and this chapter examines that Web integration. You'll learn about browsing the Web with Outlook, using the desktop conferencing options available in Outlook, and accessing your Microsoft Exchange Server e-mail through a Web browser. The chapter finishes with a discussion of add-ins, which can enhance Outlook's functionality.

Understanding the Outlook Folders

Outlook uses a standard set of folders to organize your data. Once you're comfortable working with these standard folders, you'll be able to change their location, customize their appearance, or even create additional folders, as you'll learn throughout this book.

The following list describes the default Outlook folders:

Calendar This folder contains your schedule, including appointments, meetings, and events.

Contacts This folder stores information about people, such as name, address, phone number, and a wealth of other data.

Deleted Items This folder stores deleted Outlook items and can contain items of various types (contacts, messages, and tasks, for example). You can recover items from the Deleted Items folder, giving you a way to “undelete” an item if you've made a mistake or changed your mind. If you delete an item from this folder, however, the item is deleted permanently.

Drafts Use this folder to store unfinished drafts of messages and other items. For example, you can use the Drafts folder to store a lengthy e-mail message you haven't had a chance to finish yet. Or you might start a message, have second thoughts about sending it, and place it in the Drafts folder until you decide whether to send it.

Inbox Outlook delivers your e-mail to this folder. Keep in mind that, depending on the types of e-mail accounts in your profile, you might have more than one Inbox in locations other than your default information store. For example, if you have an IMAP account and an Exchange Server account, you'll have an Inbox folder for each.

Journal The Journal folder stores your journal items, allowing you to keep track of phone calls, time spent on a project, important e-mail messages, and other events and tasks.

Notes The Notes folder stores and organizes notes. You can move or copy notes to other folders in Outlook as well as to folders on disk (such as your desktop). You can also create shortcuts to notes.

Outbox The Outbox stores outgoing messages until those messages are delivered to their destination servers. You can configure Outlook to deliver messages immediately after you send them or have the messages wait in your Outbox until you process them (by synchronizing with the Exchange Server or performing a send/receive operation through your POP3 account, for example).

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Sent Items The Sent Items folder stores a copy of messages you have sent. You can configure Outlook to automatically store a copy of each sent item in this folder.

Tasks The Tasks folder lists tasks that have been assigned to you or that you have assigned either to yourself or to others.

Working with the Standard Outlook Views

Before you can become proficient at using Outlook, you need to be familiar with its standard views and other elements of its interface. This section introduces you to Outlook's standard views, including information on how to work with them and customize them to meet your needs.

Outlook Today

Outlook provides default views of its standard folders as well as one additional view that is a summary of your schedule, tasks, and e-mail for the current day. This view, called Outlook Today, is the default view when you perform a clean installation of Outlook. To switch to this view if you have selected a different default view or if you are in another folder, click Outlook Today on the Outlook Bar (under Outlook Shortcuts). Figure 3-1 shows a typical Outlook Today view. In the calendar section on the left, Outlook summarizes your schedule for the current day, showing each appointment with time and title. You can easily view the details of a particular appointment by clicking the appointment time or title to open it.

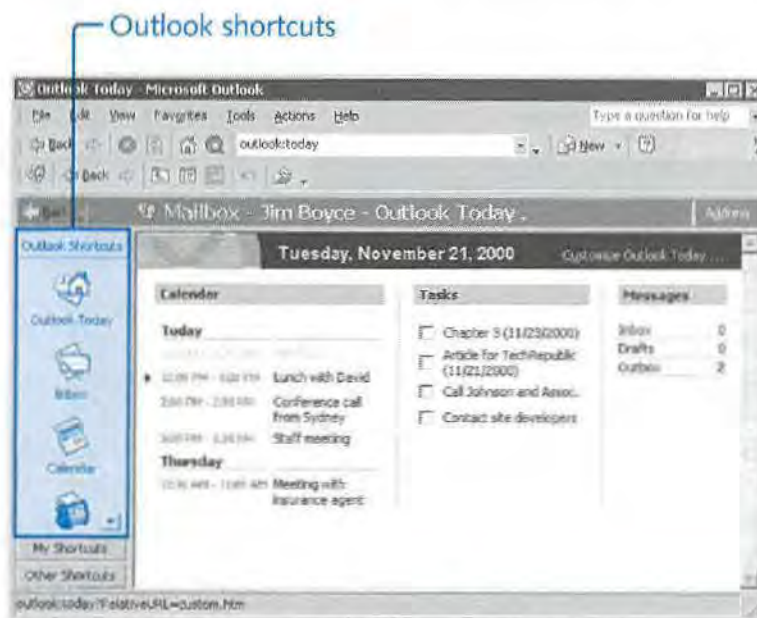


Figure 3-1. Outlook Today, the default Outlook view, lets you see your day at a glance.

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In the middle column, Outlook Today lists your tasks for the current day, including overlapping tasks whose duration is longer than one day. The list includes a title and completion date for each task, along with a check box. You can mark the task as completed by selecting the check box; doing so crosses out the task in the list. If the check box is cleared, the task is incomplete.

The third column in Outlook Today lists the number of messages in your Inbox, Drafts, and Outbox folders. If the number appears in bold, the associated folder contains unread messages.

For details on customizing the Outlook Today view to display additional information (including the use of HTML code in such customization), see "Customizing Outlook Today View," page 623.

Inbox

The Inbox displays your default message store (see Figure 3-2). For example, if you use an Exchange Server account and store your data on the Exchange Server, the Inbox view shows the Inbox folder on the Exchange Server. If you've configured Outlook to deliver messages to a local store (such as a PST file), the Inbox view shows the contents of the Inbox folder in that store.

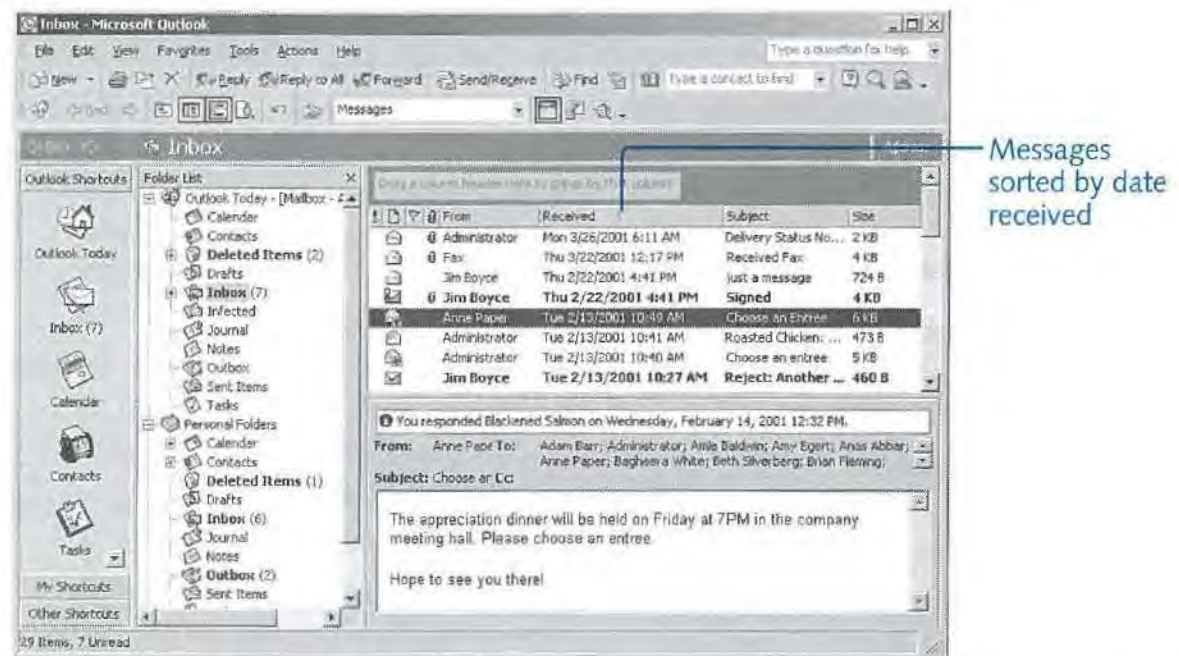


Figure 3-2. The Inbox view shows the contents of the Inbox folder of your default store.

As you can see in Figure 3-2, the Inbox view shows the message header for each message, including such information as sender, subject, and date and time received in various columns. You can easily sort messages by clicking on the column header for the column you want to use as the sort criterion. For example, to quickly locate messages from a specific sender, you can click the From column header to sort the list alphabetically by sender. To switch between ascending and descending sort, simply click the col-

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umn header again. An up arrow beside the column name indicates an ascending sort (such as A to Z), and a down arrow indicates a descending sort (such as Z to A).

To learn how to add and remove columns and change their appearance and order, see "Customizing the Inbox View," page 63.

By default, Outlook shows the following columns in the Inbox view:

- **Importance.** This column indicates the level of importance, or priority, the sender has assigned to a message—Low, Normal, or High. A High priority message is accompanied by an exclamation mark, while a down arrow marks a Low priority message. No icon is displayed for a message of Normal importance.

tip

After you've received a message, you can change its priority status by right-clicking the message, choosing Options, and specifying a new importance level.

- **Icon.** The icon column indicates the type of message and its status. For example, unopened messages are accompanied by a closed envelope icon, and read messages are accompanied by an open envelope icon.
- **Flag Status.** In this column, you can flag messages for follow-up action. For example, you can flag a message that requires you to place a call, to forward the message, or to respond at a particular time. You specify the action, date, and time for follow-up. Outlook displays a reminder for flagged items based on the flag settings you specify. To flag a message, right-click the message header and choose Follow Up. To mark the follow-up task as completed and change the flag icon, right-click the flagged message and choose Flag Complete. Choose Clear Flag to remove the follow-up.

For detailed information on flagging messages for follow-up and other ways to manage and process messages, see "Flagging and Monitoring Messages and Contacts," page 226.

- **Attachment.** The Attachment column displays a paper clip icon if the message includes one or more attachments. Right-click a message and choose View Attachments to view the attachments, or simply double-click an attachment in the preview pane.

caution

Although Outlook provides protection against viruses and worms by preventing you from opening certain types of attachments, this is no guarantee against infection. Your network administrator might have modified the blocked attachments lists, or you might have modified your blocked attachments list locally, to allow a specific attachment type susceptible to infection to come through. So you should still exercise caution when viewing attachments, particularly from unknown sources. It's a good practice to save attachments to disk and run a virus scan on them before opening them.

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- **From.** This column shows the name or address of the sender.
- **Subject.** This column shows the subject, if any, assigned by the sender to the message.
- **Received.** This column indicates the date and time the message was received.
- **Size.** This column indicates the overall size of the message, including attachments.

Time Is Relative

The date and time displayed in the Inbox's Received column can be a little deceiving. This data reflects the time the message was placed in your message store. If you're working online with an Exchange Server account, for example, Outlook shows the time the message was placed in the Inbox folder for your mailbox on the Exchange Server. If the time on your computer isn't coordinated with the time on the server, the time you actually receive the message could be different from the time reflected in the message header. For sent messages (in the Sent Items folder), the time indicated is the time the message was placed in your Outbox. If you're working offline, that time could differ from the time the message is actually sent.

Previewing Messages

Another part of the Inbox view is the preview pane, which appears at the bottom of the view. You can use the preview pane to preview messages without opening them in a separate window. The scroll bar on the right of the preview pane lets you scroll through the message. The top of the preview pane presents information about the message, such as sender, recipient, subject, and attachments. You can double-click most of the items in the preview pane header to see detailed information about the item. For example, you can double-click the name in the From field to display information about the sender (see Figure 3-3). Use this method to quickly copy contact information about the sender from the message to your Personal Address Book. You can also double-click attachments to open them. Right-clicking an item opens its shortcut menu, from which you can choose a variety of actions to perform on the item—for instance, you can right-click an attachment and choose Save As to save the attachment to disk. Experiment by right-clicking items in the preview pane to see which actions you can take for specific items.

tip If a message has been flagged for follow-up, information about the follow-up (the specific action, the date due, and so on) also appears in the preview pane header.

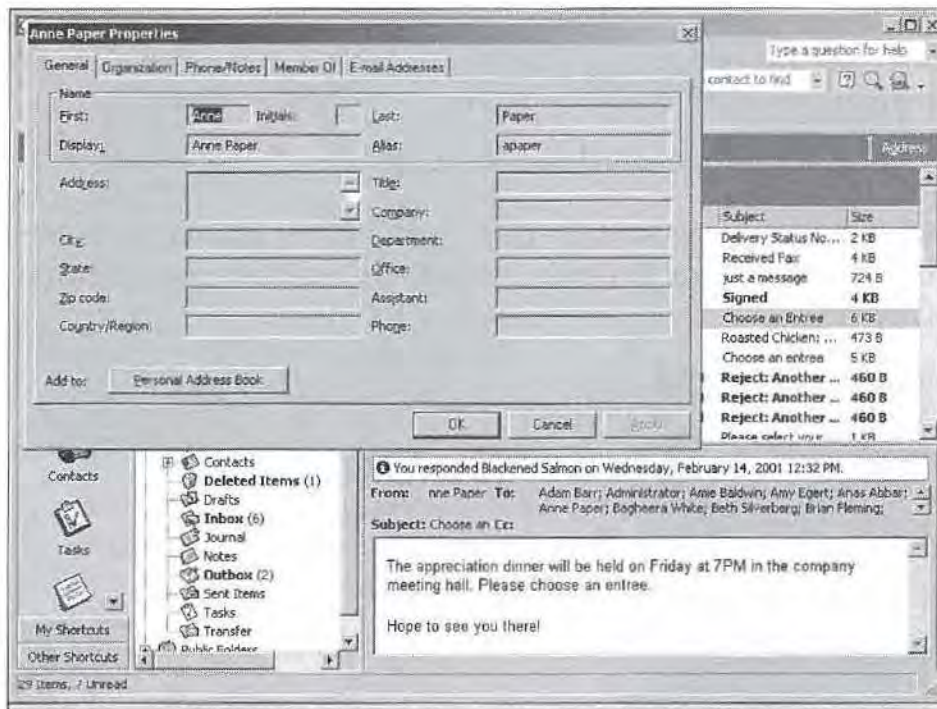


Figure 3-3. Double-click an item in the preview pane header to view detailed information about the item.

tip To turn the preview pane on or off, choose View, Preview Pane.

For detailed information on using and customizing the preview pane in various folders, see "Using the Preview Pane," page 86.

The AutoPreview feature also allows you to preview your messages. With message folders such as the Inbox, AutoPreview displays the first three lines of a message below its message header in the main folder window. This leaves you free to preview the first few lines of a message without opening the message or even selecting it. You can use AutoPreview in conjunction with or instead of the preview pane.

For additional information on configuring and using AutoPreview, see "Using AutoPreview," page 87.

Customizing the Inbox View

Outlook offers a wealth of settings that you can use to control messaging. In addition, you also have quite a bit of control over the appearance of the Inbox and other message folders. For example, you can change the column headings included in the Inbox or add and remove columns. The following sections explore specific ways to customize the Inbox (which apply to other message folders as well).

For detailed information on configuring messaging and other options, see "Configuring Outlook Options," page 88.

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Adding and removing columns By default, Outlook displays only a small subset of the available fields for messages. You can add columns for other fields, such as CC or Sensitivity, to show additional information.

To add and remove columns, follow these steps:

- 1 Open the folder you want to modify, right-click the column header bar, and choose Field Chooser to display the Field Chooser dialog box, shown in Figure 3-4.

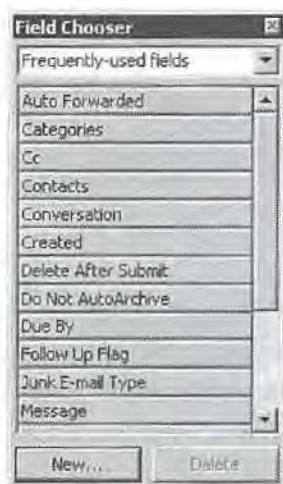


Figure 3-4. Add or remove columns by using the Field Chooser dialog box.

- 2 Locate the name of the field you want to add, and then drag the field to the desired location on the column header bar. Outlook displays arrows on the top and bottom of the column header bar to indicate where the column will be inserted.
- 3 Add other fields if necessary.
- 4 To remove a field, drag the field from the column header bar to the Field Chooser dialog box.
- 5 Close the Field Chooser dialog box.

You can choose other types of fields by selecting a type from the drop-down list at the top of the Field Chooser dialog box. You can also use this dialog box to create custom fields.

Outlook also provides another method for adding and removing columns in message folders:

- 1 Right-click the column header bar, choose Customize Current View, and then click Fields to display the Show Fields dialog box (see Figure 3-5).

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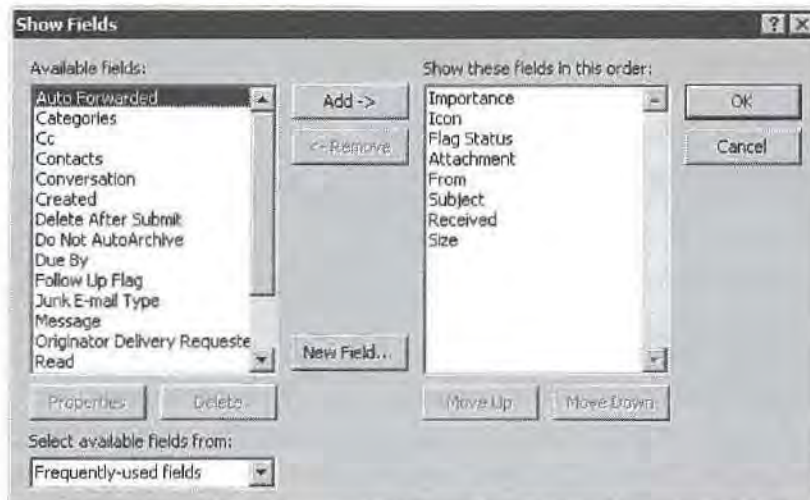


Figure 3-5. You can also use the Show Fields dialog box to add or remove columns.

- 2** To add a column, select the field from the Available Fields list and click Add.
- 3** To remove a column from the folder view, select the field from the Show These Fields In This Order list and click Remove.
- 4** Click OK to have your changes take effect.

Changing column order In a message folder, Outlook defaults to displaying columns in a specific order, but you can easily change the order. The simplest way is to drag a column header to the desired location. You also can right-click the column header bar, choose *Customize Current View*, click *Fields* to display the Show Fields dialog box (shown in Figure 3-5), and use the *Move Up* and *Move Down* buttons to change the column order.

Changing column names Outlook uses a default set of names for the columns it displays in message folders. However, you can change those column names—for example, you might want to rename the *From* column to *Sender*.

To change a column name, follow these steps:

- 1** Right-click the column header bar and choose *Format Columns* to display the *Format Columns* dialog box, shown in Figure 3-6 on the next page.
- 2** From the Available Fields list, select the field whose column header you want to change.
- 3** In the Label box, type the label you want displayed in the column header for the selected field.

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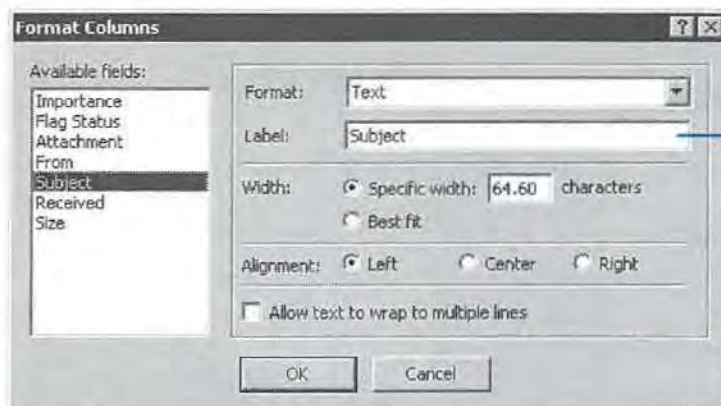


Figure 3-6. You can change several column characteristics, including column header name.

- 4 Repeat steps 2 and 3 for other fields you want to change.
- 5 Click OK to apply the changes.

tip Make other changes in column display

You can't change the name of the Importance, Flag Status, or Attachment column. However, you can switch between using a symbol or text in the Importance and Flag Status columns. You can change the Attachment column to display either the paper clip icon or the text True/False, On/Off, or Yes/No, depending on whether the message has an attachment.

Changing column width If a column isn't wide enough to show all the information for the field or if you need to make room for more columns, you might want to change the column width. The easiest way to change the width of a column is to drag the edge of the column header in the column header bar to resize it. Alternatively, you can right-click the column header bar, choose Format Columns, and specify a column width in the Format Columns dialog box (see Figure 3-6).

tip Automatically size columns

Use the Best Fit option in the Format Columns dialog box to automatically size the selected column, based on the amount of data it needs to display. Outlook examines the data for the field in the existing messages and resizes the column accordingly.

Changing column alignment By default, all the columns are left-aligned in message folders, including the Inbox. You can, however, justify the columns to display to the left, right, or center. For example, you might want to change the format

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for the Size column to show only numbers and then display it right-justified. Simply right-click the column header bar and choose Format Columns. In the Format Columns dialog box (shown earlier in Figure 3-6), select the column to change and click Left, Center, or Right, depending on the type of justification you want.

Changing column data format Each default column in a message folder displays its data using a particular format. For example, the From column shows only the sender, not the recipient. Although in most cases the specified recipient is you, that isn't the case when the message you've received is a carbon copy. You might, then, want to change the data format of the From column to also display the person specified in the To field of the message. Other columns also offer different formats. For example, you can change the data format used by time and date fields such as Received or Sent to show only the date rather than date and time.

To change the data format used for a particular column, right-click the column header bar and choose Format Columns. In the Format Columns dialog box (shown in Figure 3-6), select the column whose format you want to change and then select the format from the Format drop-down list. The available formats vary according to the field selected.

Grouping messages Outlook offers many ways to organize and display your data. A good example of this flexibility is the option of grouping messages based on a hierarchy of criteria. For example, you might want to group messages in your Inbox first by subject, and then by sender, and then by date received, as shown in Figure 3-7.

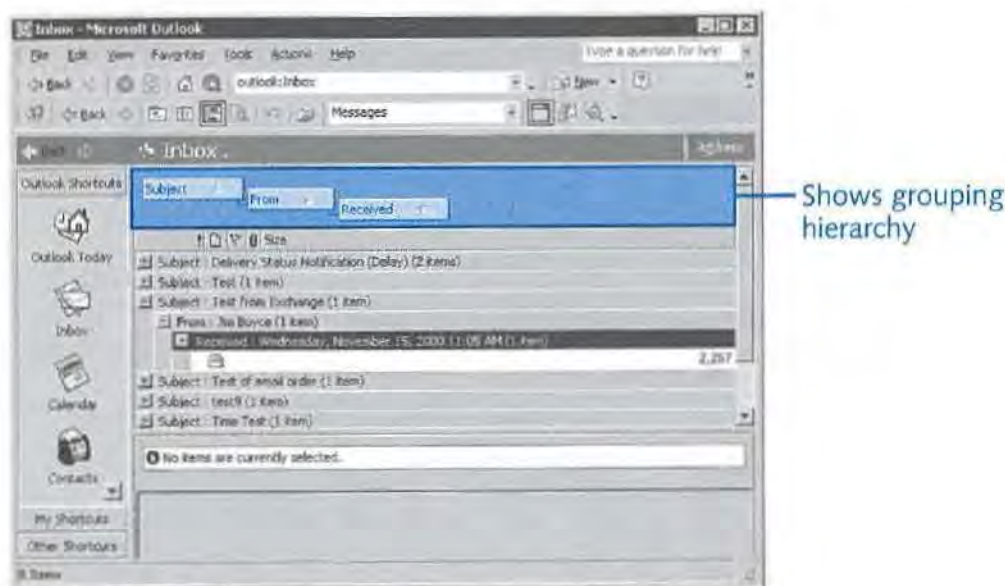


Figure 3-7. These messages are organized by three fields.

To organize your messages based on a particular column, you can simply right-click the column and choose Group By This Field.

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For more complex groupings, follow these steps:

- 1 Right-click the column header bar and choose Group By Box to display the Group By box above the column header bar.
- 2 To set up a grouping, drag a column header from the column header bar to the Group By box.
- 3 To set up an additional level of grouping, drag another column header to the Group By box. Repeat this process until you have as many levels of grouping as you need.

To hide or show the Group By box, right-click the column header bar and choose Group By Box again. To expand or collapse your view of a group of messages, click the plus sign (+) and minus sign (–) icons next to the group or message.

For a detailed explanation of grouping and sorting, along with several other topics that will help you organize your data, see “Grouping Messages by Customizing the Folder View” page 230.

Calendar

In the Calendar folder, you can look at your schedule in several different ways. By default, the calendar view shows the current day’s schedule as well as the Date Navigator (a monthly calendar) and the TaskPad, which displays tasks that overlap or fall on the current day (see Figure 3-8).

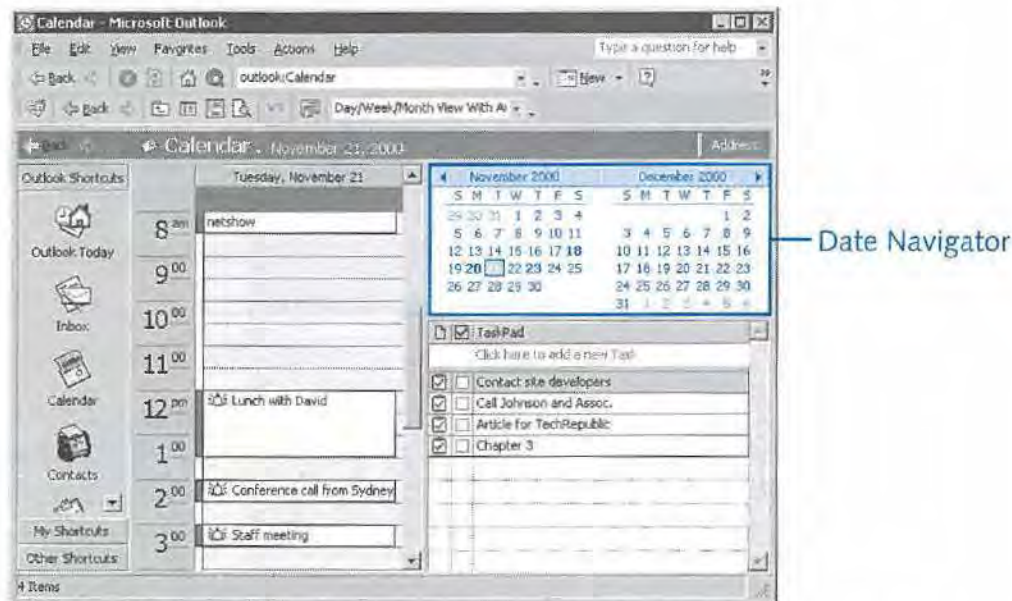


Figure 3-8. The default calendar view shows your schedule and tasks.

Your schedule shows the subject for each scheduled item—a brief description of a meeting or an appointment, for example—beside its time slot, blocking out the time

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assigned to the item. Items that overlap in the schedule are displayed side by side, as shown in Figure 3-9.

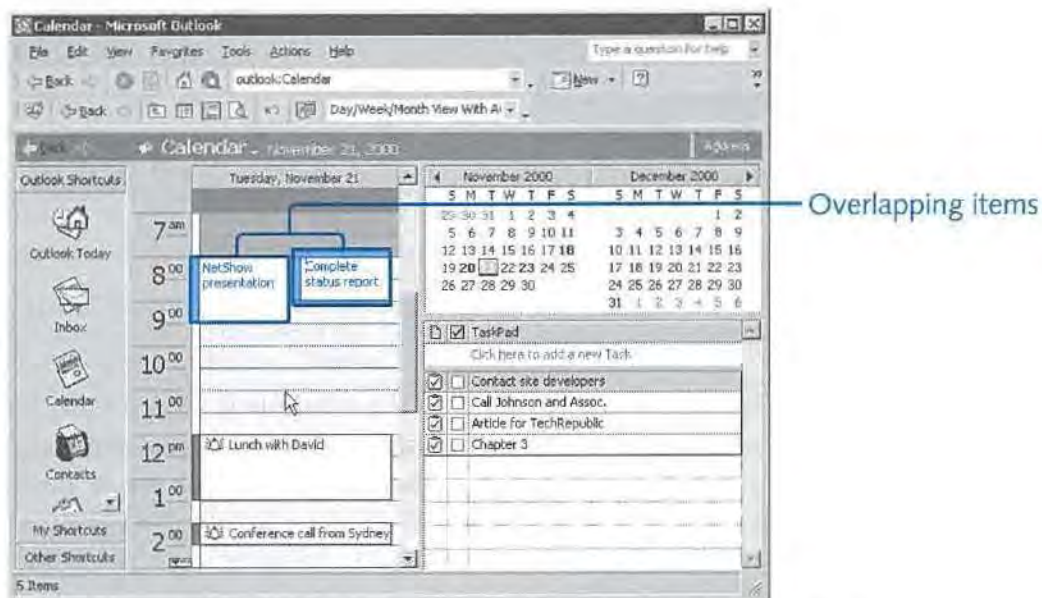


Figure 3-9. Overlapping items appear side by side in your schedule.

Working with the Schedule

The calendar view by default shows only the subject for each item scheduled in the period displayed. You can open the item to modify it or view details about it by double-clicking the item, which opens its form, shown in Figure 3-10.

The screenshot shows the 'Lunch with David - Appointment' form. The 'Subject' field contains 'Lunch with David'. The 'Location' field is empty. The 'Start time' is set to 'Tue 11/21/2000' at '12:00 PM', and the 'End time' is 'Tue 11/21/2000' at '1:30 PM'. The 'Reminder' is set to '15 minutes'. The 'Show time as' is set to 'Busy'. The 'Label' is set to 'Meet for lunch and to discuss pending contracts'. The form also includes buttons for 'Save and Close', 'Recurrence...', 'Invite Attendees...', 'Contacts...', and 'Categories...'.

Figure 3-10. A sample appointment form showing details for a selected appointment.

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You can add an item to your schedule by using one of these methods:

- Double-click the time slot of the start time you want to assign to the item.
- Right-click a time slot and choose the type of item to create (an appointment, a meeting, or an event).
- Select a time slot and then choose File, New to select the item type.
- Click the down arrow beside New on the Standard toolbar and select the item type.

The first method opens an appointment form. The form opened by the other three methods depends on the type of item you select.

Changing the start or end time for an item in the schedule is also easy. To move an item to a different time without changing its duration, simply drag the item to the new time slot. To change start or end time only, place the pointer over the top or bottom edge of the item and drag it to the desired time.

Using the Calendar's Preview Pane

Like the Inbox and other message views, the calendar view has a preview pane that lets you preview appointments and other items in your schedule without opening them. Just click the item to have it appear in the preview pane (see Figure 3-11). To turn the preview pane on or off, choose View, Preview Pane. To display more or less information in the pane, drag the top edge of the preview pane to resize it. You can also make other changes to the displayed item—such as subject and times—through the preview pane.

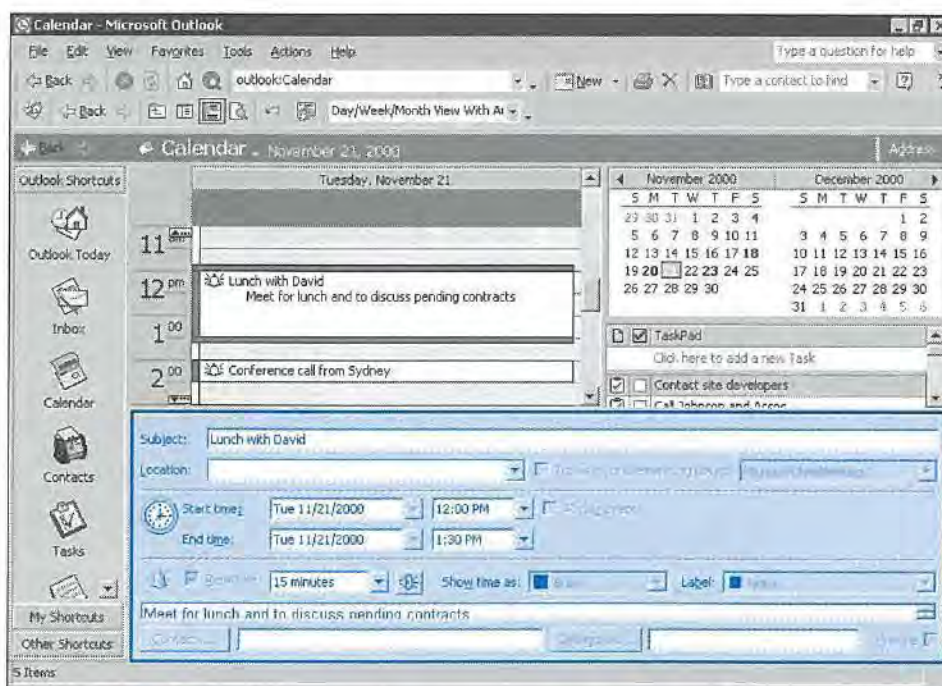


Figure 3-11. Use the preview pane in the Calendar view to preview scheduled items.

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Using the TaskPad

The TaskPad, which appears at the bottom right of the default calendar view, displays a list of your tasks. By default, the TaskPad shows the tasks for the current day. However, you can change the types of tasks displayed by choosing View, TaskPad View and selecting the types of tasks you want Outlook to show, such as overdue tasks, tasks for the following week, or all tasks. You can mark a task as completed by selecting the check box beside the task name. As you can in the Inbox and other views, you can change the format of the columns displayed in the TaskPad: right-click the TaskPad column header bar and choose Format Columns.

For more information about the TaskPad and the features Outlook provides for working with and assigning tasks, see Chapter 20, "Managing Your Tasks."

Using the Date Navigator

The monthly calendars in the upper right area of the calendar view are collectively called the Date Navigator. This feature is useful not only as a calendar but also as a way to provide a fast glance at how heavily scheduled your time is. Days with a scheduled item appear in bold, while those without scheduled items appear in a normal font. You can view a particular day by clicking it. Click the arrow at the left or right of the Date Navigator to change which months are displayed. You can also click the column header bar above either month to choose which month to view.

tip Specify the Date Navigator's font

You can configure the Date Navigator to display all dates in normal text rather than using bold for days that contain items. Choose View, Current View, Customize Current View and click Other Settings. Clear the Bolded Dates In Date Navigator Represent Days Containing Items check box and then click OK.

You can change the number of months displayed by the Date Navigator by resizing the display, resizing the Calendar folder's window, or changing the font used by the Date Navigator. Assign a smaller font to show more months. (For details on how to change the Date Navigator's font, see "Setting Advanced Options," page 97.)

Customizing the Calendar View

Although the default calendar view shows only the subject for a scheduled item, you can configure the view to show additional detail—or you can change the view completely. For example, you can switch from a daily view to one that shows the work week, the calendar week, or the month. You can see an example of Work Week view in Figure 3-12, Week view in Figure 3-13 (both on the next page), and Month view in Figure 3-14 on page 73. To select a particular view, choose View and then choose Day, Work Week, Week, or Month, according to the type of view you want.

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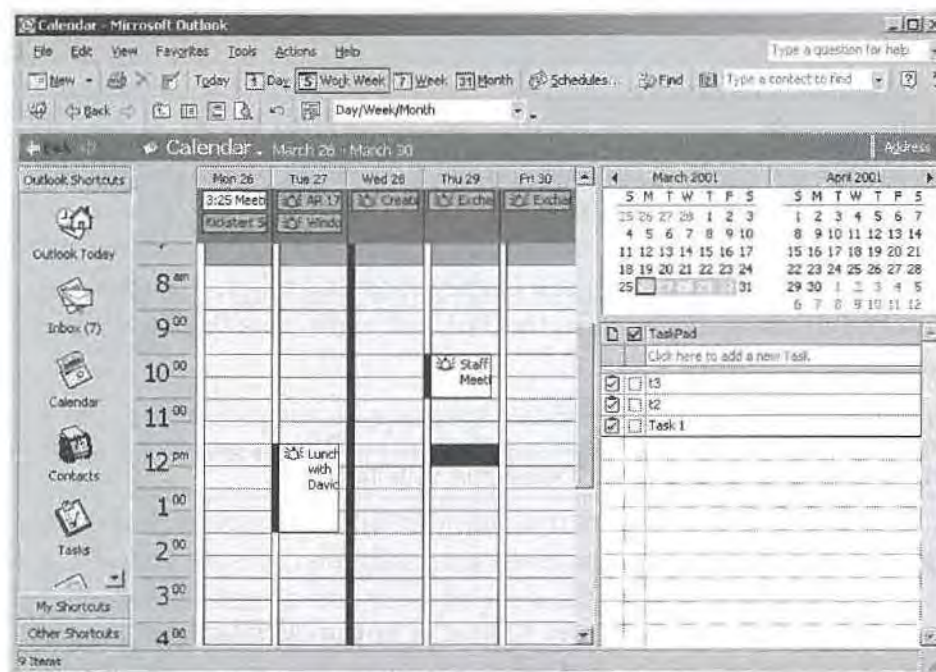


Figure 3-12. Use Work Week view to organize your work schedule.

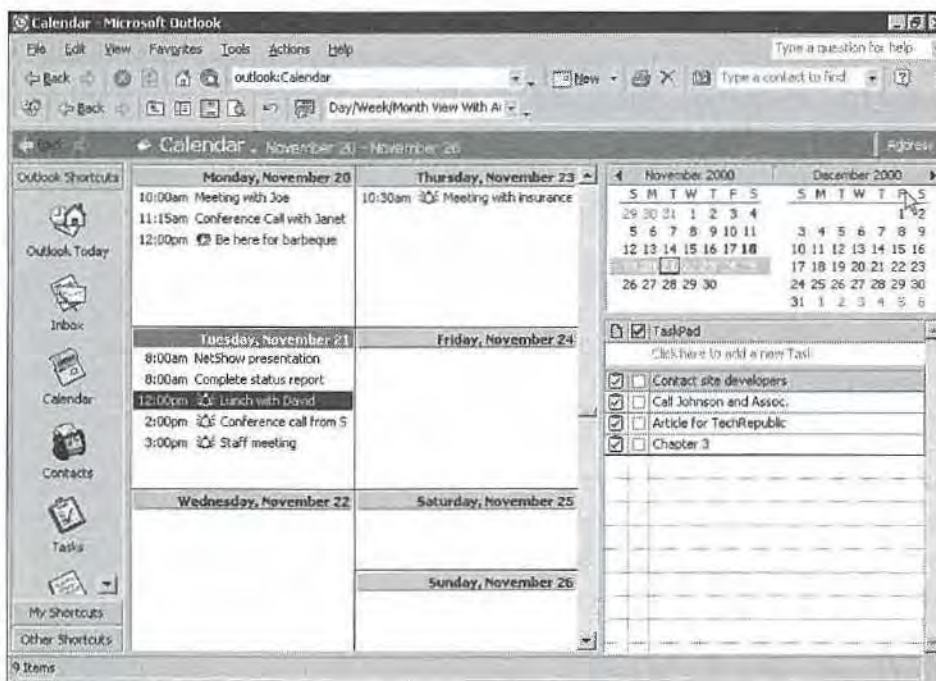


Figure 3-13. Week view can help you plan your entire week, both personal and work time.

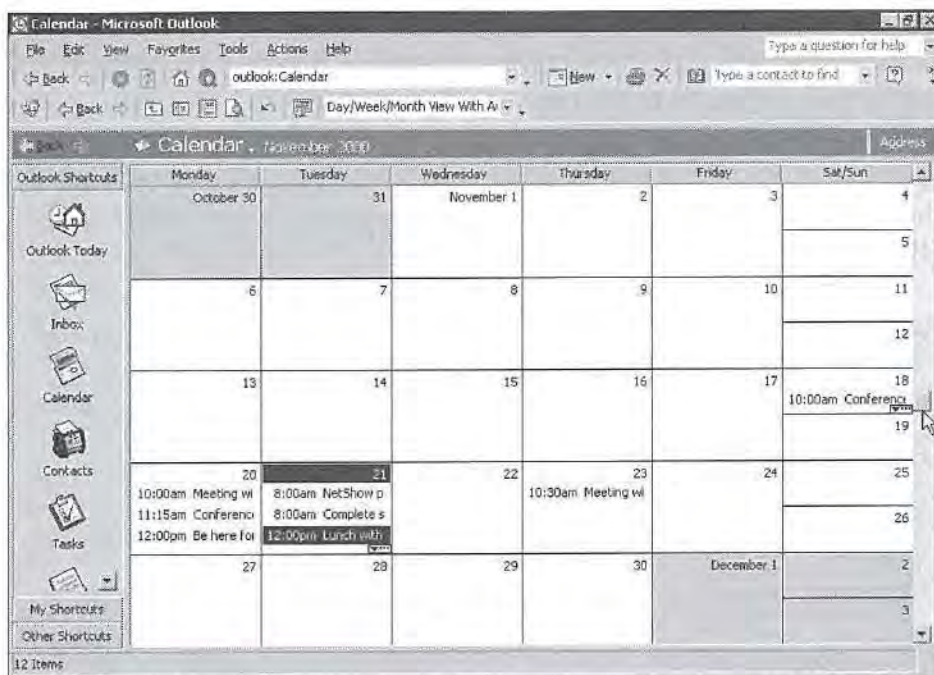


Figure 3-14. Use Month view to plan a broader range of time.

You have additional options for viewing your schedule in the Calendar folder. Choose the View command and then one of the following to change the view:

- **Day/Week/Month.** Shows the item title only in each view (Day, Work Week, Week, or Month).
- **Day/Week/Month With AutoPreview.** Includes AutoPreview in Day and Work Week views. With AutoPreview, Outlook displays as much of the data for the item as possible in the current view.
- **Active Appointments.** Shows only active appointments.
- **Events.** Shows only events.
- **Annual Events.** Shows only annual events.
- **Recurring Appointments.** Displays recurring appointments.
- **By Category.** Displays scheduled items grouped according to their assigned categories.

For additional information on customizing the way Outlook displays information in the various calendar views, see Chapter 18, "Scheduling Appointments."

Contacts

The Contacts folder stores all your contact information. By default, the Contacts folder displays Address Cards view (see Figure 3-15 on the next page), which shows the name for each contact along with other selected fields (address and phone number, for

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example). You can view the details for a contact by double-clicking the contact's address card, which opens the contact form, shown in Figure 3-16. Using this form, you can view or make changes to the contact's data or perform other tasks, such as calling the contact, generating a meeting request, or viewing a map of the contact's address. If you have a large number of contact entries stored in the Contacts folder, you can click the buttons at the right edge of the view to select which portion of the contacts list to show.

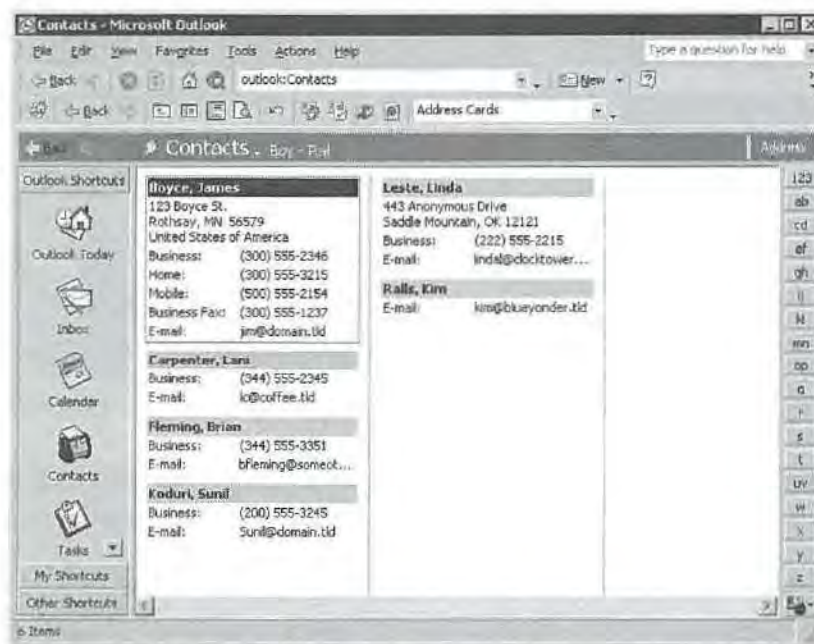


Figure 3-15. By default, the Contacts folder displays Address Cards view.

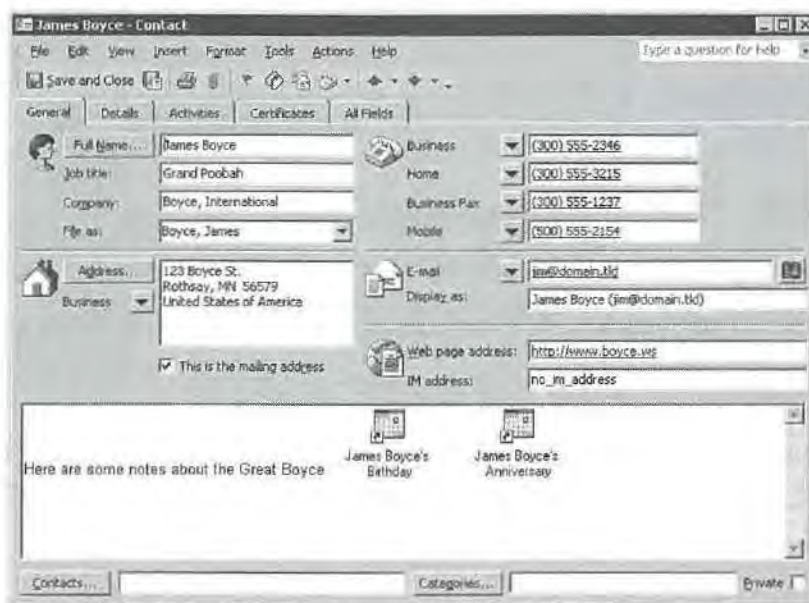


Figure 3-16. When you double-click a contact entry, you can view the contact form for that person.

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For a detailed discussion of working with contacts, including the actions you can take with the contact form, see Chapter 14, "Managing Your Contacts."

Outlook offers several other ways to view the contents of your Contacts folder. Choose View, Current View and then one of the following commands to change the view:

- **Address Cards.** Displays the name of each contact along with other selected data.
- **Detailed Address Cards.** Shows additional detailed information for each contact, including the person's title, the company the person works for, personal notes, and more.
- **Phone List.** Displays the contacts as a phone list.
- **By Category.** Groups contacts by their assigned categories.
- **By Company.** Groups contacts by the company with which they're affiliated.
- **By Location.** Groups contacts by country or region.
- **By Follow-Up Flag.** Groups contacts by the status of follow-up flags on their entries.

Adding contact entries to your Contacts folder is easy: Just right-click in the contacts view and choose New Contact, or click New on the toolbar. Either action opens the contact form, in which you enter the contact's data.

Customizing the Contacts View

Like other views in other folders, the view in the Contacts folder can be customized to suit your needs and preferences. For example, you can adjust the view to display additional fields of information or to remove fields you don't need. You can sort the view based on specific contact criteria or group like items together based on multiple criteria. For details about customizing the Contacts folder view, see Chapter 14, "Managing Your Contacts."

Tasks

The Tasks folder contains your task list. The default tasks view (see Figure 3-17 on the next page) lists each task in a simple list with subject, due date, and status. Double-click an existing task to open the task form, which displays detailed information about the task, including due date, start date, status, notes, and so on (see Figure 3-18 on the next page). To add a new task to the list, double-click a blank list entry to open a new task form, where you can enter all the details about the task.

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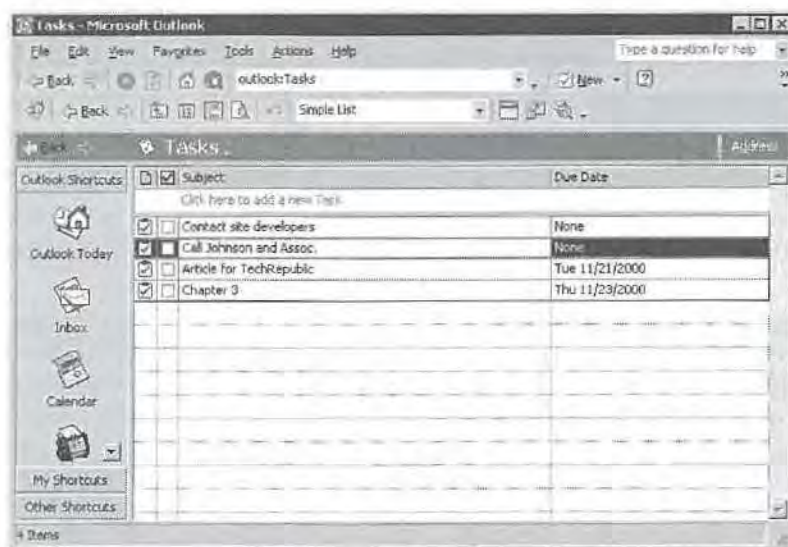


Figure 3-17. By default, the Tasks folder displays this view.

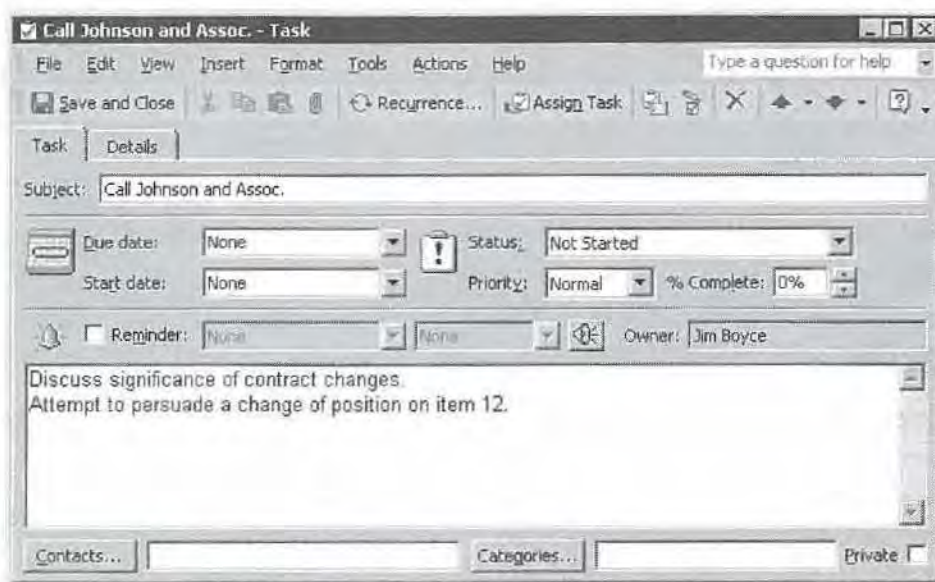


Figure 3-18. Use a task form to create a new task.

The task list shows tasks you've assigned to others as well as those tasks assigned to you (by yourself or by others). These assignments can be one-time or recurring, and the list shows both in-progress and completed tasks.

Like other Outlook views, the tasks view provides a preview pane you can use to view details for a task without opening the task item. To turn on the preview pane, choose View, Preview Pane. AutoPreview is also available in the Tasks folder; it displays notes about the task below the task name (see Figure 3-19).

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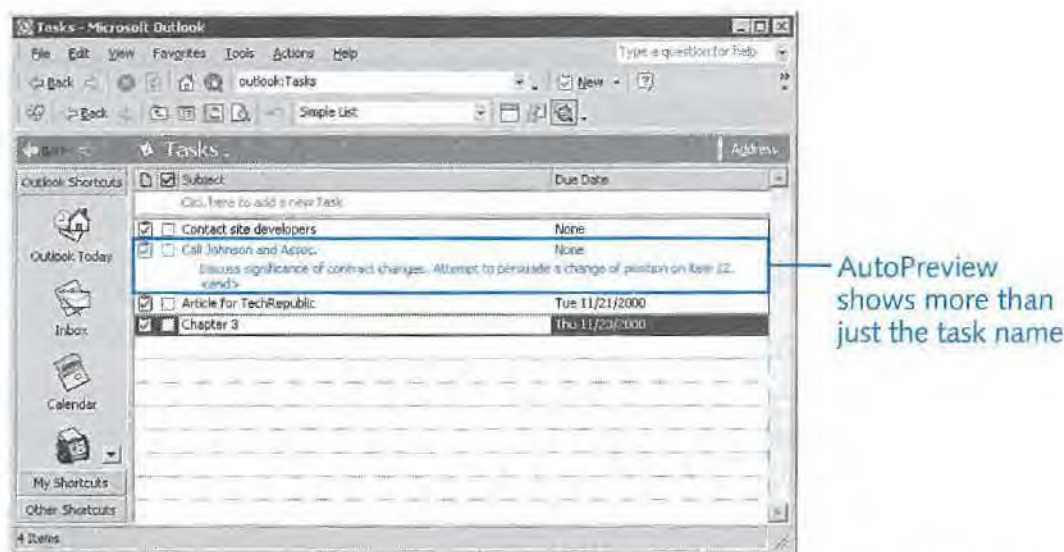


Figure 3-19. AutoPreview displays additional information about a task below the task name in the list.

Customizing the Tasks View

You can customize the view in the Tasks folder in a variety of ways—adding and removing columns, changing column names, or organizing tasks by category or other properties, to list a few. To customize the columns, right-click the column header bar and choose **Format Columns**. The resulting dialog box allows you to select the format for each column, change the name, apply justification, and so on. To change the order of columns in the view, simply drag the column headers into the desired positions, resizing as needed.

You can also organize your task list in various ways. You can click column headers to sort the columns in ascending or descending order, and you can group the columns based on a particular field or group of fields, just as you can in the Inbox and other Outlook folders.

You can also choose **View, Current View** and then one of the following commands to change the Tasks Folder view:

- **Simple List.** Shows whether the task has been completed, the task name, and the due date.
- **Detailed List.** Shows status, percent complete, and categories in addition to the information displayed in Simple List view.
- **Active Tasks.** Displays tasks that are active.
- **Next Seven Days.** Displays tasks for the next seven days.

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- **Overdue Tasks.** Displays incomplete tasks whose due dates have passed.
- **By Category.** Organizes the task list by the categories assigned to tasks.
- **Assignment.** Shows the tasks assigned to specific people.
- **By Person Responsible.** Groups the view according to the person responsible for the various tasks.
- **Completed Tasks.** Shows only completed tasks.
- **Task Timeline.** Displays a timeline of all tasks.

For more information on customizing the view in the Tasks folder, see "Viewing and Customizing the Tasks Folder," page 564.

Notes

With its notes feature, Outlook helps you organize your thoughts and tasks. Each note can function as a stand-alone window, allowing you to view notes on your desktop outside Outlook. The notes view provides a look into your Notes folder, where your notes are initially stored. From there, you can copy or move them to other locations (such as the desktop) or create shortcuts to them. By default, the initial notes view displays the notes as icons, with the first line of the note serving as the title under the note's icon (see Figure 3-20).

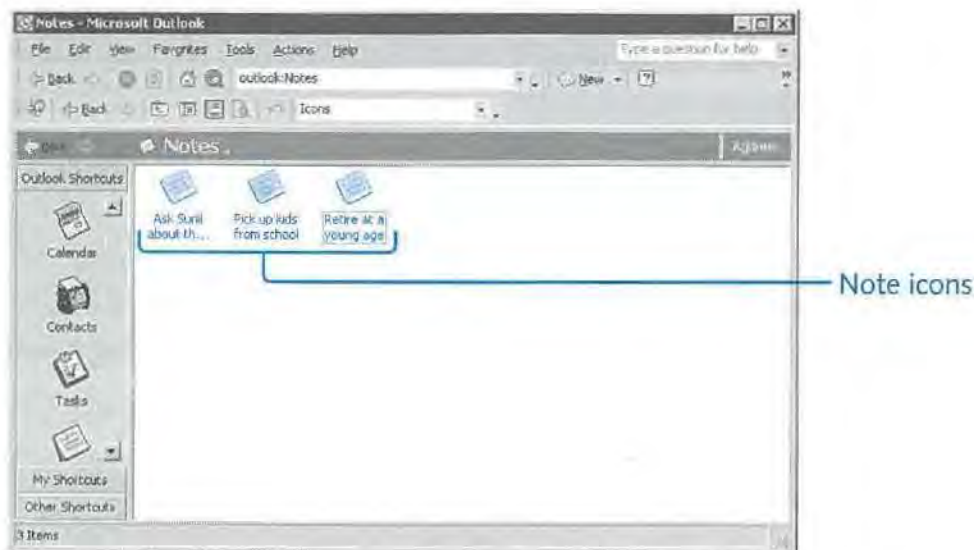


Figure 3-20. The standard notes view displays notes as icons.

As it does for other folders, Outlook offers several other ways to view the Notes folder. Choose Views, Current View and then one of the following:

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- **Icons.** Displays an icon for each note, with the first line of the note serving as the icon's description (the default view).
- **Notes List.** Displays the notes as a line-by-line list.
- **Last Seven Days.** Resembles Notes List view, but restricts the display to only the past seven days, based on the current date.
- **By Category.** Groups the notes by their assigned categories.
- **By Color.** Groups the notes by their assigned color.

tip You can assign different colors to notes to serve as visual cues for the note's purpose, importance, or content.

You can use a preview pane in the Notes folder, displaying the text of a note when you click it in the list. You can also use AutoPreview in Notes List and Last Seven Days views to automatically display the contents of each note.

You can customize the views in the Notes folder the same way you can in other folders. You can, for example, drag columns to rearrange them, resize them, change column name and other properties, add other fields, and group notes based on various criteria.

For a detailed explanation of how to work with the Notes folder, see Chapter 16, "Making Notes."

Deleted Items

The Deleted Items folder contains Outlook items that you've deleted, and it can include all the Outlook item types (such as messages, contacts, and appointments). The Deleted Items folder offers a way for you to recover items you've deleted, because the items remain in the folder until you manually delete them from that location or allow Outlook to clean out the folder. When you delete an item from the Deleted Items folder, that item is deleted permanently.

You can configure Outlook to automatically delete all items from the Deleted Items folder when you exit Outlook. To do so, choose Tools, Options and click Other. Select the check box Empty The Deleted Items Folder Upon Exiting and click OK.

Choosing the Startup View

Outlook uses Outlook Today view as the default startup view. However, you might want to change the view based on your type of work and the Outlook folders you use most. Or you might want to use another view as the initial view because it presents the information you need right away each morning to start your work day.

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You can designate any of the Outlook folders as your startup view. Follow these steps:

- 1 In Outlook, choose Tools, Options.
- 2 Click the Other tab and then click Advanced Options.
- 3 From the Startup In This Folder drop-down list, select the view you want to see by default when Outlook starts.
- 4 Click OK, and then click OK again to close the Options dialog box.

Using Other Outlook Features

In addition to the various folders and views described in this chapter, Outlook incorporates several other standard components in its interface. The following sections explain these features and how to use them effectively.

note This book assumes that you're familiar with your operating system and comfortable using menus. Therefore, neither the Outlook menu bar nor its individual menus are discussed in this chapter. Specific menus and commands are covered where applicable.

InsideOut

Outlook uses personalized menus, displaying only those menu items you've used most recently. You can click the double arrow at the bottom of a menu to see all of its commands. Although personalized menus unclutter the interface, they can be annoying if you prefer to see all available commands or are searching for a specific command that isn't displayed. To display all menu commands on a specific menu, right-click the menu or a toolbar and choose Customize. On the Options tab, select Always Show Full Menus.

Using the Outlook Bar

The Outlook Bar appears at the left edge of the Outlook window and contains shortcuts to the standard Outlook folders as well as shortcuts to folders you've created and to other important data folders (see Figure 3-21). For example, the Other Shortcuts group includes shortcuts to the My Documents folder, to My Computer, and to your Favorites folder. Just click an icon on the Outlook Bar to open that folder or item. The Outlook Bar therefore gives you quick access not only to Outlook folders but also to all your data.

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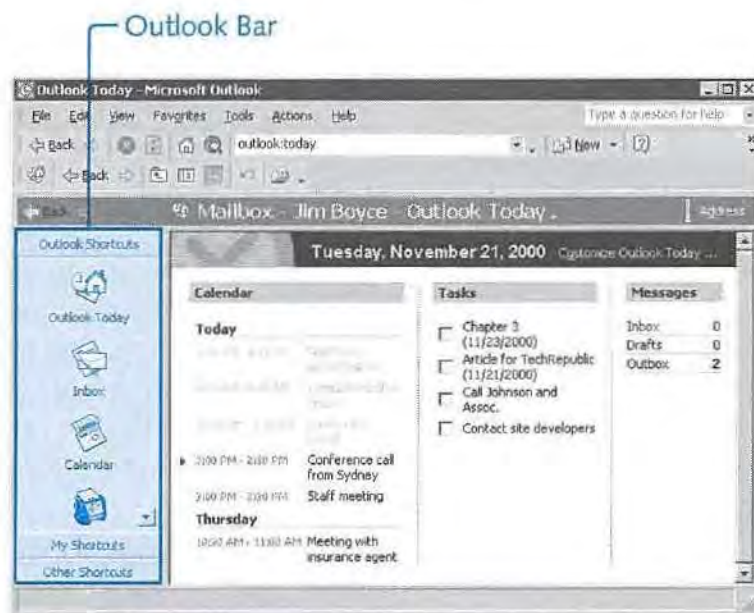


Figure 3-21. The Outlook Bar provides quick access to all Outlook data and other often-used resources and folders.

For a detailed discussion of the Outlook Bar, including how to create your own groups and shortcuts, see “Customizing the Outlook Bar,” page 605.

The following list summarizes the standard groups of shortcuts on the Outlook Bar and their contents:

- **Outlook Shortcuts.** This group contains shortcuts to each of your main Outlook folders, including Outlook Today, the Inbox, Calendar, Contacts, Tasks, Notes, and Deleted Items.
- **My Shortcuts.** This group provides quick access to some of your other Outlook folders, including Drafts, Outbox, Sent Items, and Journal. The My Shortcuts group also includes a shortcut to the Outlook Update Web site, a site maintained by Microsoft for updating your Microsoft Office application suite.

For information about obtaining updates and finding troubleshooting resources for both Outlook and Office, see Appendix C, “Update and Troubleshooting Resources.”

- **Other Shortcuts.** This group contains shortcuts to My Computer, My Documents, and your Favorites folder.

note You can create new shortcuts in any of the existing groups on the Outlook Bar, and you can also create your own groups.

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Depending on your monitor's resolution and the number of shortcuts in each group, you might not be able to see all the icons in a group. If that's the case, you can use the up and down arrow buttons on the right edge of the Outlook Bar to scroll through the icons in the selected group.

Using Objects on the Outlook Bar

Most of the time, you'll probably just click an icon on the Outlook Bar to open its associated folder. However, you can also right-click an icon and use the resulting shortcut menu to perform various tasks with the selected object. For example, you might right-click the Calendar icon and choose Open In New Window to open a second window showing the calendar's contents. Or you might choose Advanced Find to carry out an advanced search in the selected folder. To view a different group, simply click the group's button on the Outlook Bar.

Controlling the Outlook Bar's Appearance

By default, Outlook displays the icons on the Outlook Bar using large icons, as shown previously in Figure 3-21. If your groups contain a lot of shortcuts, you might prefer to use small icons so that more items will fit in the visible portion of the Outlook Bar. To change the size of the icons, right-click the Outlook Bar and choose either Large Icons or Small Icons, depending on your preference. Figure 3-22 shows the Outlook Bar with small icons.

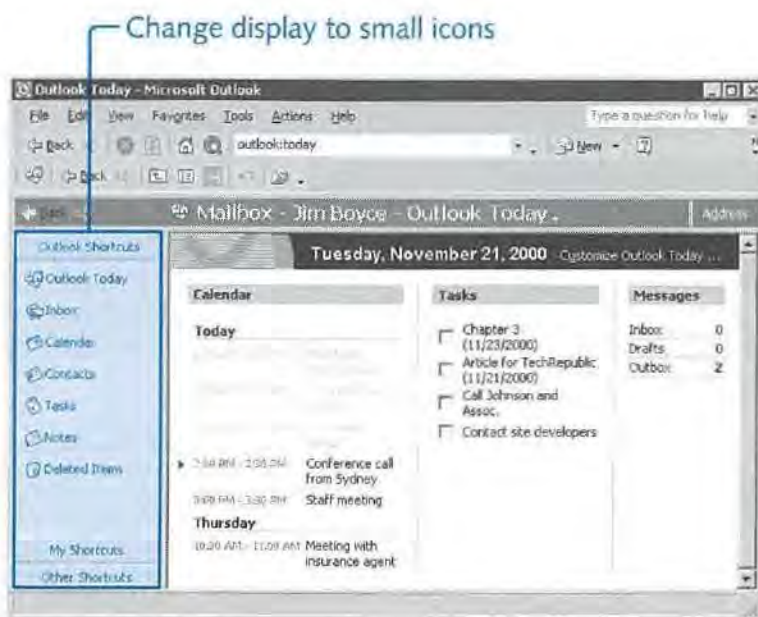


Figure 3-22. You can configure the Outlook Bar to display small icons instead of large icons.

If you seldom use the Outlook Bar, you can turn it off to make room on the screen for the folder list or other data. Simply choose View, Outlook Bar to turn the display off or

on. Alternatively, you can right-click the Outlook Bar and choose Hide Outlook Bar to turn off the display.

Using the Standard Outlook Toolbars

Outlook provides a Standard toolbar for the current folder that offers quick access to the tasks and functions you perform most frequently in that folder. Thus, the contents of the Standard toolbar change depending on the folder you have open. Certain items that appear on the toolbar for all folders work in specific ways in the context of the selected folder. For example, when you're working in the Inbox folder, clicking the New toolbar button starts a new e-mail message. With the Contacts folder open, clicking New opens a new contact form. You don't have to accept the default contextual action for these types of toolbar buttons, however—you can click the small down arrow next to a button to choose a specific command instead (see Figure 3-23). To display the Standard toolbar in a folder, choose View, Toolbars, Standard. Use the same process to turn off the toolbar display.

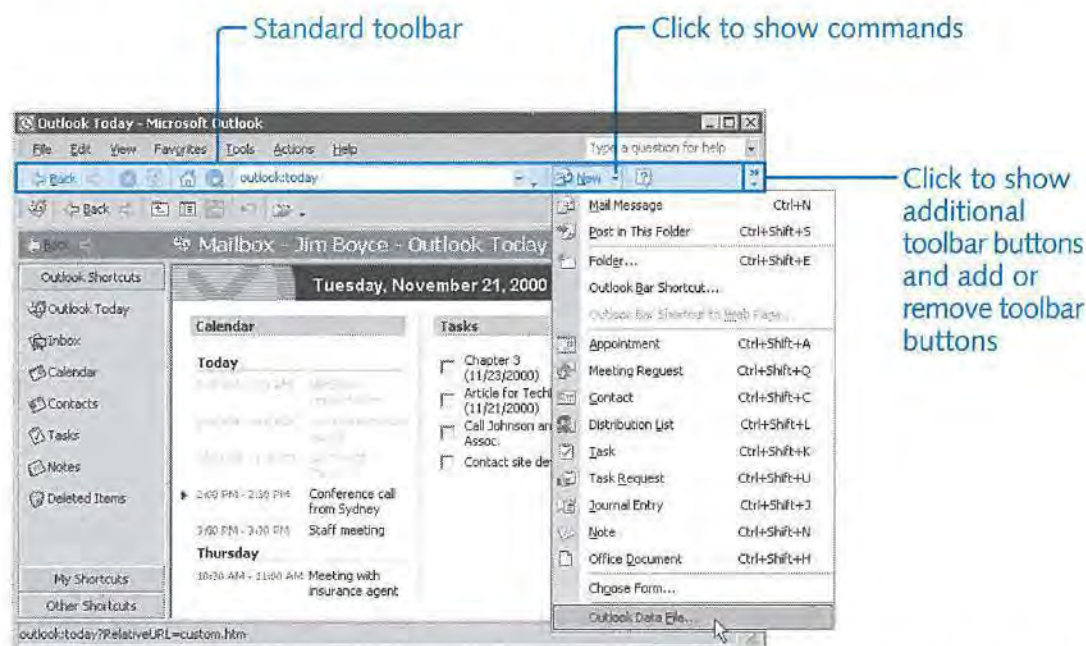


Figure 3-23. Click the down arrow beside a toolbar button to view additional command options.

note Outlook 2002 and other Office XP applications now also refer to both menus and toolbars as *command bars*. However, Outlook still refers to the individual bars as *toolbars*. This book uses the two terms synonymously.

tip If you're not sure what function a toolbar button performs, rest the pointer over the button to have Outlook display a ScreenTip explaining the button's purpose.

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If your display isn't wide enough to accommodate the entire toolbar, Outlook displays a double right arrow icon on the right edge of the toolbar. Click this icon to view the remaining toolbar buttons and add or remove buttons from the toolbar.

For more information on customizing the Standard toolbar and other toolbars, see "Customizing Command Bars," page 612.

The Advanced toolbar, shown in Figure 3-24, provides additional commands and also works in the context of the current folder. In addition to navigation buttons, the Advanced toolbar contains buttons for opening and closing the preview pane and the folders list, printing, setting up rules, selecting the current view, and more. Turn the Advanced toolbar on or off by choosing View, Toolbars, Advanced.

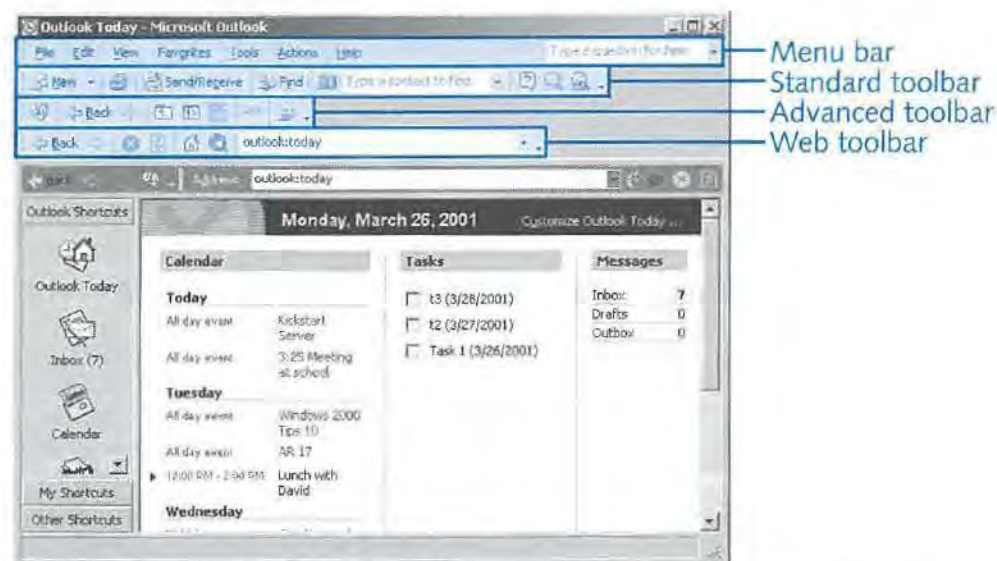


Figure 3-24. The Advanced toolbar lets you change views quickly.

The Web toolbar functions much as the navigation toolbar does in Microsoft Internet Explorer. It includes Web navigation buttons, a URL address box, buttons for stopping and refreshing the current page, and so on. Choose View, Toolbars, Web to show or hide the Web toolbar.

Using Multiple Outlook Windows

Although Outlook opens in a single window, it supports the use of multiple windows, which can be extremely useful. For example, you might want to keep your Inbox open while you browse through your schedule. Or perhaps you want to copy items from one folder to another by dragging them. Whatever the case, it's easy to use multiple windows in Outlook.

When you right-click a folder on the Outlook Bar, the shortcut menu for that folder contains the Open In New Window command. Choose this command to open the selected folder in a new window, keeping the existing folder open in the current window.

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You also can open a folder from the folder list (discussed next) in a new window. However, the folder list uses an AutoHide feature to automatically hide the folder list after you select a folder. You must first lock the list so that it will stay open before you can right-click a folder and open the folder in a new window. To lock the folder list, click the push pin in the upper right corner of the folder list. Then right-click a folder and choose Open In New Window to open that folder in a new window.

Using the Folder List

When you need to switch between folders, you'll probably use the Outlook Bar most of the time. But the Outlook Bar doesn't include shortcuts to all your folders by default, and adding those shortcuts can clutter the bar, especially if you have multiple data stores. Fortunately, Outlook provides another quick way to navigate your folders: the folder list.

At the top of the folder window and below the toolbars and menu bar, you'll find a navigation bar. (See Figure 3-25.) To the right of the Back and Forward buttons is a drop-down menu with the current folder's name. Click the drop-down menu to display the folder list, as shown in Figure 3-25. In the list, click the folder you want to open. Outlook hides the folder list again after you select the folder.

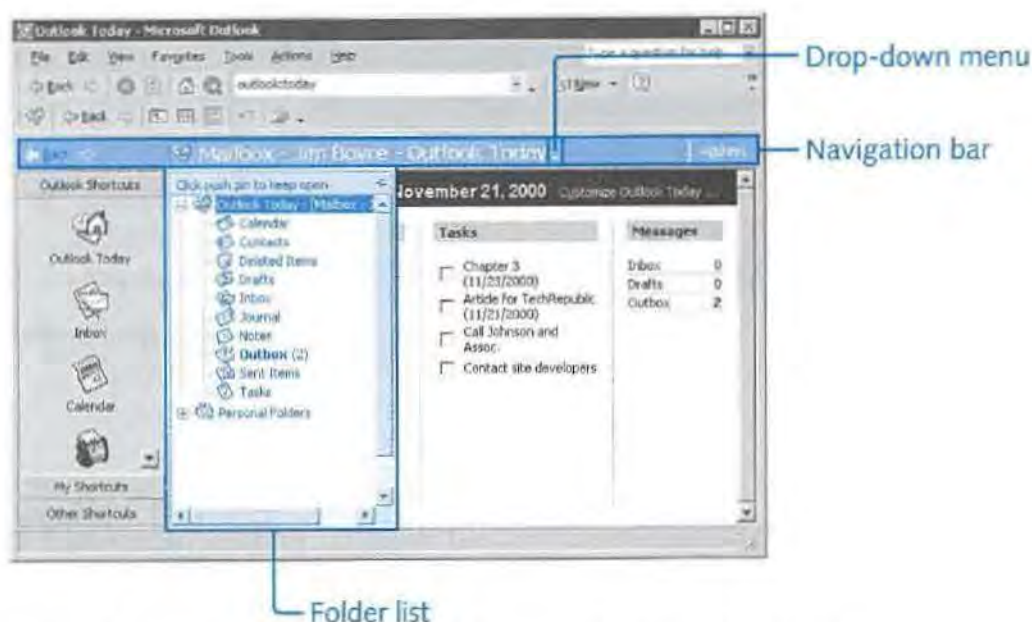


Figure 3-25. Use the folder list to browse and select other folders.

In some cases, you might want to keep the folder list open rather than letting it close automatically. For example, you can't right-click a folder in the list without first locking the list so that it will stay open. To do so, click the push pin in the upper right

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corner of the folder list. The icon changes to an X. Click the X to close the folder list when you no longer need it.

Using the Status Bar

The status bar appears at the bottom of the Outlook window (see Figure 3-26) and presents information about the current folder and selected items, such as the number of items in the folder. It can also include other status information, such as the progress of folder synchronization. If you don't need the information in the status bar, you can turn it off to gain a little more space for the current folder's display. To turn the status bar on or off, choose View, Status Bar.

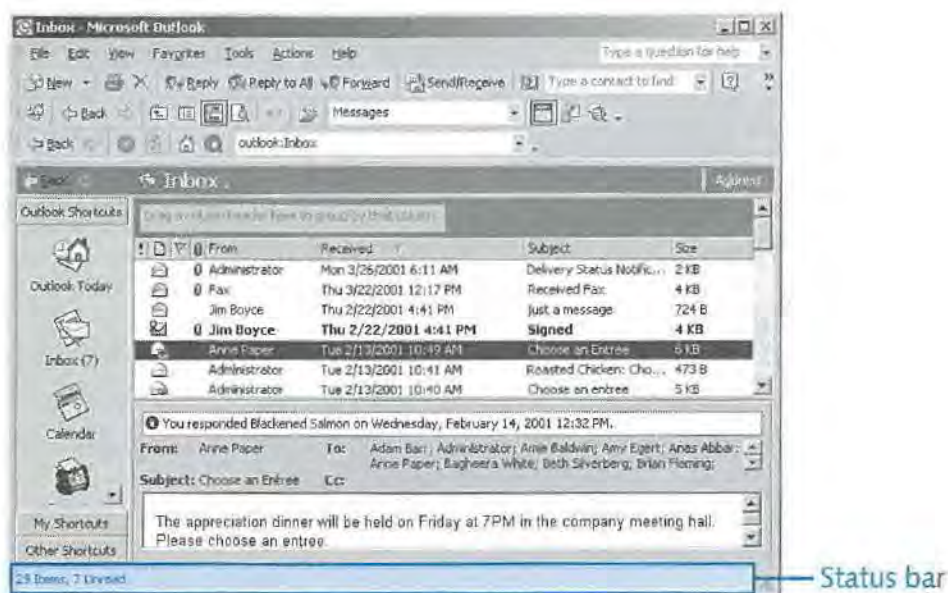


Figure 3-26. The status bar provides useful information, such as the number of items in the selected folder.

Using the Preview Pane

In earlier sections of this chapter, you read about the preview pane, which allows you to preview Outlook items without opening them. For example, you can preview an e-mail message in the preview pane simply by clicking the message header. To turn the preview pane on or off, choose View, Preview Pane or click the Preview Pane button on the Advanced toolbar.

To some degree, how the preview pane functions depends on how you configure it. For example, you can set up the preview pane to mark messages as read after they've been previewed for a specified length of time. To configure the preview pane, choose Tools, Options, click the Other tab, and click Preview Pane. Select options based on the following list:

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- **Mark Messages As Read In Preview Window.** Select this option to have messages marked as read when they've been previewed for the time specified by the following option.
- **Wait *n* Seconds Before Marking Item As Read.** Specify the number of seconds a message must be displayed in the preview pane before it is marked as read.
- **Mark Item As Read When Selection Changes.** Select this option to have the message in the preview pane marked as read when you select another message.
- **Single Key Reading Using Spacebar.** Selecting this option allows you to use the Spacebar to move through your list of messages to preview them. Press Shift+Spacebar to move up the list. You also can use the Up and Down Arrow keys to move up and down the message list.

newfeature!

The preview pane in Outlook 2002 offers some new functionality, which includes the following:

- In a message folder, you can double-click an address in the preview pane to view details for the address.
- The InfoBar (discussed later in this section) now appears in the preview pane, giving you additional information about the selected item. The InfoBar was previously available only in message folders and the Calendar folder.
- The preview pane header displays the message's attachments. You can double-click an attachment to open it or right-click the attachment and choose other tasks from the shortcut menu (such as saving the attachment).
- The preview pane now displays Accept and Decline buttons so that you can accept or decline a meeting request in the preview pane without opening the request.

Using AutoPreview

AutoPreview, which is available in the Inbox, Notes, and Tasks folders, allows you to preview Outlook items without opening the preview pane. For example, with AutoPreview turned on in the Inbox folder, the first three lines of each message appear under the message header. To turn AutoPreview on or off for the current folder, choose View, AutoPreview. The AutoPreview state (on or off) is saved on a folder-by-folder basis, so you can have AutoPreview turned on for the Inbox and turned off for Notes and Tasks.

newfeature!

Using the InfoBar

In earlier versions of Outlook, the InfoBar appeared only in message and appointment forms, giving you additional information about the selected item. The InfoBar in a message form, for example, displays the From, To, Cc, and other fields. In Outlook 2002, however, the InfoBar also appears in the preview pane, as shown in Figure 3-27.

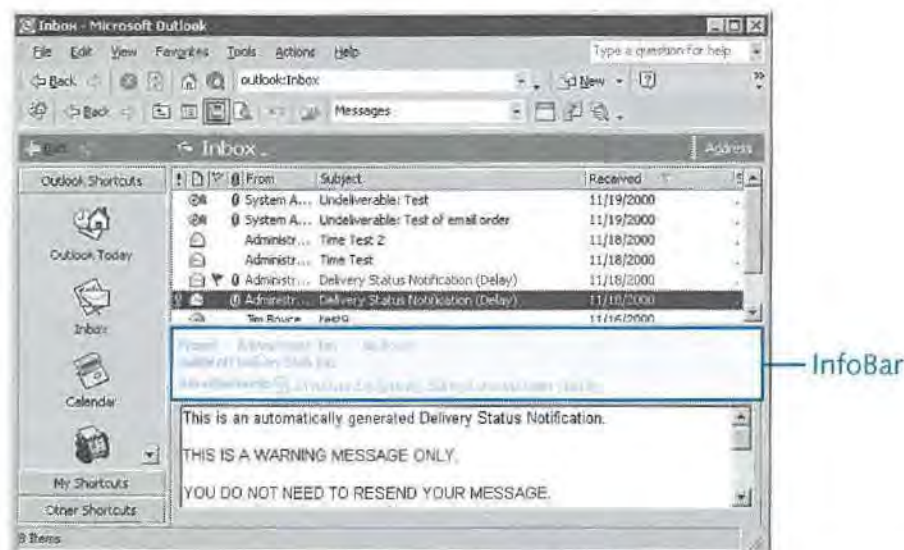


Figure 3-27. The InfoBar now appears in the preview pane as well as in message and appointment forms.

Some of the fields in the InfoBar simply display information, but others lead to more details. For example, you can double-click a name in the InfoBar to view the associated address and other contact information, or you can double-click attachments to open them.

Configuring Outlook Options

Because Outlook is a complex application with a broad range of capabilities, you have a good many options for controlling the way it looks and functions. This portion of the chapter is designed to help you configure Outlook to perform the way you need it to.

Each of the following sections describes a tab in Outlook's Options dialog box, providing an overview of the features listed on that tab. Because many of the options in this dialog box are best understood in the context of the feature they control, you'll find more detail about individual options in chapters that focus on a particular Outlook feature (messaging or scheduling, for example); be sure to consult the cross-references to the applicable chapters for more information.

To reach the Options dialog box described here, open Outlook and choose Tools, Options.

Preferences

The Preferences tab of the Options dialog box, shown in Figure 3-28, lets you configure general settings for all of Outlook's primary functions, from e-mail to scheduling to contact management.

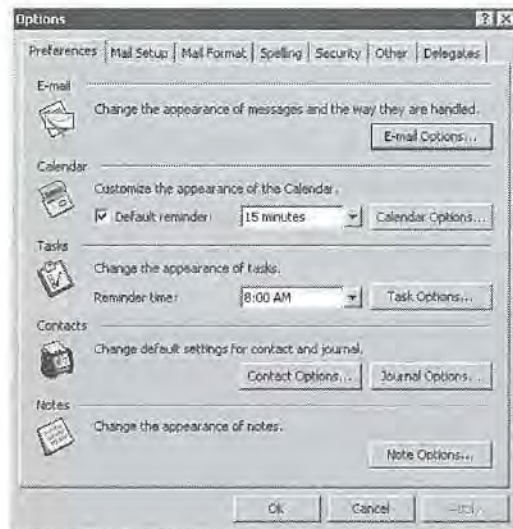


Figure 3-28. Use the Preferences tab of the Options dialog box to configure a broad range of general options.

Each of the option groups on the Preferences tab controls how a specific Outlook component works. The following list will help you locate specific settings:

E-Mail You can specify how Outlook handles messages—for example, whether Outlook keeps a copy of sent items, saves unsent messages, or includes original message content in replies and forwards. Chapter 7, “Sending and Receiving Messages,” provides extensive coverage of e-mail configuration options.

Calendar You can control the look of Outlook's calendar by, for example, defining the work week, changing the appearance of the Date Navigator, or setting background color. See Chapter 18, “Scheduling Appointments,” for a discussion of options for the Calendar folder.

Tasks You can set the color for completed and overdue tasks, set up reminders for tasks with due dates, and configure other task-related settings. Chapter 20, “Managing Your Tasks,” covers task options in detail.

Contacts You can control the way names are displayed in the Contacts folder, check for duplicate contact entries, configure journal options, and set other

options for storing and managing your contact information. See Chapter 14, “Managing Your Contacts,” for a complete explanation.

Notes You can, for example, set the color, size, and font used for notes. Chapter 16, “Making Notes,” covers options for notes.

Mail Setup

On the Mail Setup tab (see Figure 3-29), you’ll find additional settings that control e-mail accounts and Outlook’s messaging functions. For example, you can use the Mail Setup tab to create or modify e-mail accounts and configure how and when Outlook sends and receives messages.



Figure 3-29. Use the Mail Setup tab to configure e-mail accounts and general messaging properties.

The following list describes the major sections on the Mail Setup tab and directs you to the chapter where those settings are discussed:

E-Mail Accounts These settings allow you to add, remove, or configure e-mail accounts. See Chapter 2, “Advanced Setup Tasks,” and Chapter 6, “Using Internet Mail,” to learn how to configure e-mail accounts.

Send/Receive You can define groups of accounts, which Outlook then uses to determine when to process messages for specific accounts. You can configure settings separately for each group, providing a high degree of control over when and how Outlook processes messages. See Chapter 7, “Sending and Receiving Messages,” for information about send/receive groups and send/receive options.

Data Files These settings let you add, remove, and configure information stores (data files) for Outlook, including setting up offline access. See

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Chapter 1, “Outlook Architecture, Setup, and Startup,” to learn how to manage data files.

Dial-Up Here you can configure a handful of settings that determine how Outlook handles dial-up connections for sending and receiving messages. See Chapter 6, “Using Internet Mail,” to learn about dial-up connection options.

Mail Format

Use the Mail Format tab (see Figure 3-30) to control the way your messages look and how you compose those messages. For example, you can use the Mail Format tab to specify either Word or Outlook as the default e-mail editor, to choose between plain-text and rich-text options, and to set international formatting options.



Figure 3-30. Use the Mail Format tab to select the default e-mail editor, mail format, and other properties.

The following list summarizes the option groups on the Mail Format tab. For details about the various settings in each group, consult Chapter 7, “Sending and Receiving Messages.”

Message Format With these settings, you can choose between HTML, plain text, and rich text for outgoing messages; specify the default e-mail editor; specify the default e-mail viewer for rich-text messages; configure Internet and international options for messages; and set up other messaging features.

Stationery And Fonts You can set a default stationery (background) for messages, manage stationery, and specify font settings.

Signature These settings direct Outlook to add a text signature to all new messages and to replies and forwards. You can configure the two categories of messages separately. (Note that these signatures are different from digital signatures, which allow you to validate the authenticity of and encrypt messages.)

Spelling

The Spelling tab (see Figure 3-31) lets you specify how spelling should be checked in Outlook. The following sections summarize by function the settings available on this tab.



Figure 3-31. Use the Spelling tab to set options for checking spelling.

Checking Spelling

The General Options section of the Spelling tab allow you to set general guidelines for the spell checker. The options include the following:

- **Always Suggest Replacements For Misspelled Words.** When you select this option, the spell checker will display suggested changes for any misspelled words it finds.
- **Always Check Spelling Before Sending.** Select this option to have Outlook automatically check spelling before you send a message. You also can check spelling manually.
- **Ignore Words In UPPERCASE.** You can instruct the spell checker to skip over words that appear in all uppercase letters. This option is useful, for example, if your document contains numerous acronyms and you don't want the spell checker to waste time checking them.
- **Ignore Words With Numbers.** When you select this option, the spell checker will not attempt to check the spelling of words that include numbers, such as *some342*.
- **Ignore Original Message Text In Reply Or Forward.** Selecting this option specifies that Outlook will check spelling only in your message text, not in the original message text included in a reply or forward.

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- **Use AutoCorrect In Rich Text And Plain Text Messages.** Selecting this option allows Outlook to use AutoCorrect in rich-text and plain-text messages to automatically correct certain common errors. See the following section for details.

Using AutoCorrect

Outlook, like other Office applications, supports AutoCorrect, a feature that allows Outlook to correct common spelling and typing errors and to replace characters with symbols. You also can use AutoCorrect as a shortcut, which means you can type a small string of characters and have those characters replaced by a longer string. For example, if you frequently type the words **Windows 2000**, you might set up AutoCorrect to replace your shorthand typed phrase **w2k** with **Windows 2000**. See the tip on page 98 for a handy use for smart tags and AutoCorrect entries.

Clicking the AutoCorrect Options button on the Spelling tab displays the AutoCorrect dialog box, shown in Figure 3-32. You can use this dialog box to add new AutoCorrect entries or change existing entries. Click Exceptions to specify exceptions to AutoCorrect rules.



Figure 3-32. Use the AutoCorrect dialog box to add and modify AutoCorrect entries.

Editing a Custom Spelling Dictionary

When Outlook is checking spelling in a document and finds a word it considers misspelled, the program gives you the option of adding the word to a custom dictionary. This option lets you specify the correct spelling of words not found in Outlook's standard dictionary. For example, you might want to add your name to the custom dictionary if Outlook doesn't recognize its spelling. You can also add the correct spelling of special words or terms you use often to the custom dictionary.

tip Use custom dictionaries throughout Office

All Office applications use the same spelling features, including the custom dictionary. Words you add to the dictionary from other applications are available in Outlook, and vice versa. This is also true for new dictionaries that you create: if you add another dictionary to Outlook, that new dictionary is available in other Office applications.

Click Edit on the Spelling tab to open the custom dictionary (Custom.dic) in Notepad to change or add entries. Enter one word per line. The custom dictionary file is stored in the Application Data\Microsoft\Proof folder of your profile folder (which varies according to your operating system).

You can add other dictionaries to Outlook. To add a new dictionary, follow these steps:

- 1 Open a message form (start a new message, for example) and choose Tools, Spelling And Grammar.
- 2 Click Options in the Spelling And Grammar dialog box and then click Custom Dictionaries.
- 3 In the Custom Dictionaries dialog box (see Figure 3-33), select the dictionary files you want to add and click OK.

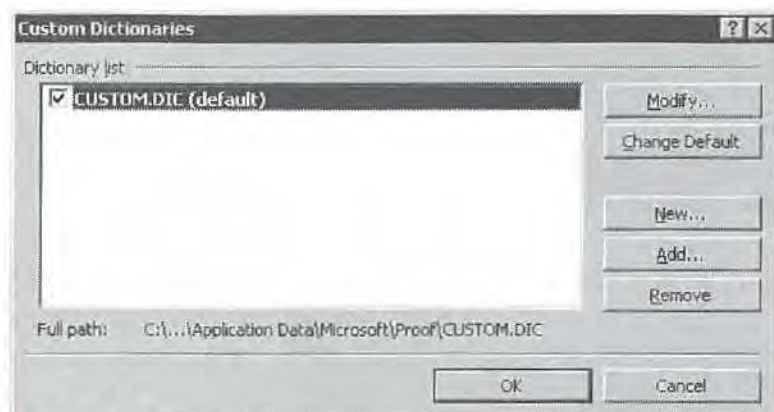


Figure 3-33. Add dictionaries by using the Custom Dictionaries dialog box.

Using International Dictionaries

The International Dictionaries section on the Spelling tab allows you to specify the language that Outlook uses when checking spelling. Simply select the appropriate language from the drop-down list and click OK.

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Security

The Security tab (see Figure 3-34) lets you configure a range of options that help you secure your messages, validate your identity to others, and protect your system against viruses and worms.

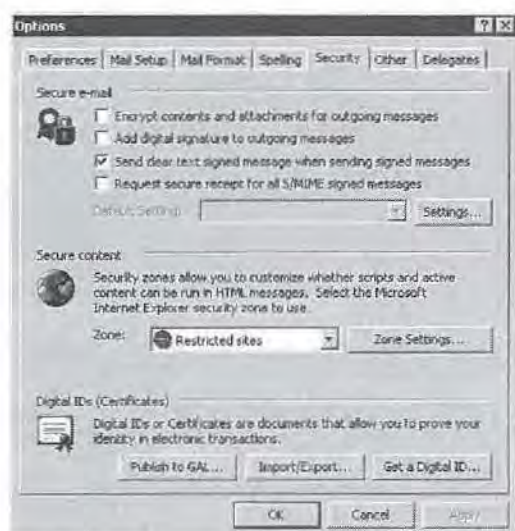


Figure 3-34. Use the Security tab to configure digital signatures and other security properties.

The Security tab includes the following groups of options.

For details about the specific options on the security tab, see Chapter 12, “Securing Your System, Messages, and Identity.”

Secure E-Mail You can choose to encrypt outgoing messages, add digital signatures to outgoing messages, and configure other options for digital signatures and encryption.

Secure Content These options help you define security zones, which determine how Outlook handles HTML messages.

Digital IDs (Certificates) The settings accessed through this area help you manage digital certificates and signatures, which allow you to share encrypted messages and validate your identity to message recipients.

Other

The Other tab (see Figure 3-35 on the next page) provides a selection of settings that apply to various aspects of Outlook. The following sections explain how to configure specific features and behavior using this tab.



Figure 3-35. The Other tab gives you access to properties for several features.

Defining the Default Program for E-Mail, Contacts, and Calendar

One setting on the Other tab lets you specify that Outlook is the default application for creating and viewing e-mail, contacts, and calendar items. Select the option **Make Outlook The Default Program For E-Mail, Contacts, And Calendar** if you want Outlook to open when you open e-mail messages, contact entries, or calendar data from other sources.

Processing Deleted Items

You can use the Other tab to determine how Outlook processes deleted items. The first of the following two options is located on the Other tab; click the **Advanced Options** button to access the second.

- **Empty The Deleted Items Folder Upon Exiting.** Select this option to have Outlook automatically delete all items from the Deleted Items folder when you exit the program. This action permanently deletes the items.
- **Warn Before Permanently Deleting Items.** Select this option if you want Outlook to warn you before it permanently deletes items from the Deleted Items folder.

Setting Up AutoArchive

The options accessed by clicking the **AutoArchive** button on the Other tab let you control how Outlook archives data, processes deleted and expired items, and implements other backup properties, such as the retention policy. See Chapter 27 “Delegating Responsibilities to an Assistant,” for more information on backup and archival options and procedures for Outlook.

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Customizing the Preview Pane

Clicking the Preview Pane button on the Other tab provides access to options that determine the way the preview pane functions. These options are explained in detail earlier in this chapter; see “Using the Preview Pane,” page 86.

Setting Up Instant Messaging

Use the Instant Messaging area on the Other tab to enable and configure MSN Messenger and use instant messaging (sending or receiving pop-up messages in communication with other users). See “Using Instant Messaging,” page 217, for more information on instant messaging.

Delegates

The Delegates tab of the Options dialog box lets you specify other persons who have delegate access to your folders and can send items on your behalf (meeting requests, for example). See Chapter 27, “Delegating Responsibilities to an Assistant,” for detailed information on using delegation and specifying delegates.

Setting Advanced Options

The Other tab of the Options dialog box lets you access a set of special advanced options for configuring Outlook. Click Advanced Options on the Other tab to display the Advanced Options dialog box, shown in Figure 3-36. You can use the options in this dialog box to configure various aspects of Outlook's behavior and appearance, as described in the list on the next page.

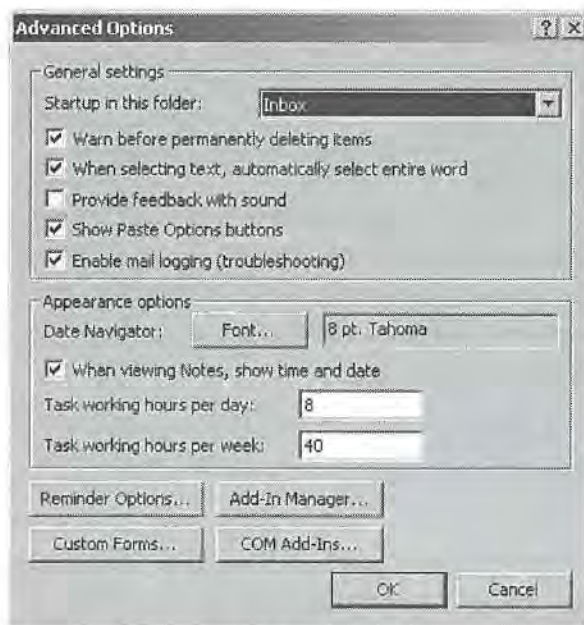


Figure 3-36. The Advanced Options dialog box controls several advanced features.

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- **Startup In This Folder.** This option lets you specify which folder Outlook opens by default when you start the program. Select the folder in the drop-down list.
- **When Selecting Text, Automatically Select Entire Word.** Select this option to have Outlook automatically select the entire word and the following space when you highlight any portion of a word. This behavior simplifies selecting words and blocks of text. This option is unavailable if you have configured Word as your default e-mail editor.
- **Provide Feedback With Sound.** You can direct Outlook to play a sound when you perform actions such as opening a file or deleting a message.

newfeature!

- **Show Paste Options Buttons.** When this option is selected, Outlook displays a smart tag when you paste data from the Clipboard, allowing you to change the paste format and other paste options. This method of changing these options is faster than using the Edit menu.

newfeature!

tip

Use smart tags to get quick access to features

Smart tags are controls embedded in documents to provide quick access to commands and features without forcing you to navigate the application's menu. When you paste data from the clipboard, for example, Office adds a smart tag beside the pasted data. You can select other paste formats and fine-tune the data without repasting or using the Edit menu. Smart tags also come in handy with AutoCorrect entries. If you type some text referenced by an AutoCorrect entry, Office changes the text automatically but adds a smart tag beside the modified text so you can select other changes or undo the correction. Other types of smart tags provide similar quick access to document data and editing.

- **Enable Mail Logging (Troubleshooting).** This option allows Outlook to log e-mail event status to the OPMLLog.log file, which is located in the Temp folder of your profile folder (for example, \Documents And Settings\<user>\Local Settings\Temp on a system running Microsoft Windows 2000).
- **Date Navigator.** Click Font to select the font used by the Date Navigator (the two-month calendar that appears in the Calendar folder). Changing the font changes not only the appearance of the Date Navigator but also the number of months displayed. Make the font smaller to show more months or larger to show fewer months.
- **When Viewing Notes, Show Time And Date.** You can have Outlook display the time and date a note was created or last modified at the bottom of the note.
- **Task Working Hours Per Day and Task Working Hours Per Week.** These two options define your work week for managing tasks. The default settings are 8 hours and 40 hours, respectively.

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- **Reminder Options.** Click this button to access settings for reminders. You can direct Outlook to display a reminder and play a sound when the reminder is due.

Using Outlook on the Web

Outlook includes several features that integrate its functionality with the Internet. This section explores these features, including a look at browsing the Web with Outlook, using NetMeeting and NetShow to facilitate desktop conferencing and collaboration, and connecting to Exchange Server through the Web protocol (formerly known as WebDAV).

Browsing the Web with Outlook

Outlook's integration with Internet Explorer allows you to browse the Internet without leaving Outlook. This feature is handy when you need to retrieve a file, view online documents, or otherwise access data on the Web but don't want to open Internet Explorer. Outlook's ability to browse the Web allows you to continue working in a single interface and avoid switching between open applications.

The default toolbar for all Outlook folders includes an Address box in which you can enter the URL for a Web-related resource, such as a Web site or an FTP site (see Figure 3-37). To view a site in Outlook, type the URL in the Address box and press Enter or click Go. Alternatively, you can click the drop-down button beside the Address box to select a URL that you've visited previously. The Stop and Refresh buttons on the toolbar perform the same function they do in Internet Explorer. When you want to go back to working with your Outlook folders, simply select the folder you need from the Outlook Bar or the folder list.



Figure 3-37. You can use Outlook to browse Web sites and other Web resources.

Using NetMeeting

Microsoft NetMeeting is a desktop conferencing application included with Internet Explorer that allows an unlimited number of people to participate in a virtual meeting across the Internet or an intranet. With NetMeeting, participants can speak with one another, exchange messages, view one another through video, share applications and files, and collaborate on documents using an electronic whiteboard. Some of the available features depend on the participants' system configurations. For example, video conferencing requires a video camera, and audio conferencing requires a sound card and microphone. Some features of NetMeeting are useful over dial-up connections, but effective conferencing—particularly with a larger number of participants—requires a higher-speed connection, such as DSL, ISDN, or dedicated T1.

NetMeeting is not a component of Outlook. Rather, NetMeeting is a separate application included with Internet Explorer. You can obtain NetMeeting and Internet Explorer from Microsoft's Web site at <http://www.microsoft.com/windows/ie/default.htm>.

For a detailed discussion of NetMeeting, including installation and configuration, see "Holding an Online Meeting," page 536.

Using NetShow

Microsoft NetShow is a client/server desktop conferencing platform for broadcasting live and on-demand audio, video, and multimedia presentations across the Internet or an intranet. NetShow is a great tool to provide not only live presentations to remote participants but also streaming multimedia across the Web.

InsideOut

Microsoft's NetShow is a complex system that is beyond the scope of this book. Chapter 19, "Scheduling Meetings and Resources," explains how to use NetShow from the client side to participate in presentations. The Microsoft Internet Explorer Resource Kit, available from Microsoft and other retailers, provides a detailed technical explanation of the NetShow platform from both the client and server perspectives. It also offers detailed information regarding NetShow deployment, presentation development, and related topics.

If you don't need the whiteboard or document collaboration features offered by NetMeeting but instead primarily use only video and audio chat, check out Eyeball Chat from Eyeball Networks at <http://www.eyeball.com>. Eyeball Chat provides great video performance and the application is free, as is access to the Eyeball Chat server.

Accessing Your Mail Through a Browser

Outlook serves as a great client application for e-mail, but on occasion you might want to use a simpler method of accessing your messages. For example, you might be out of town unexpectedly, without your computer, and realize that you need to read an important message. Or perhaps you'd like to check your office e-mail from home but don't have your Outlook configuration installed on your home computer. Whatever the case, Exchange Server supports access to your Exchange Server mailbox through Outlook Web Access (OWA), a server-side feature of Exchange Server.

Using Outlook Web Access to access your mailbox on an Exchange Server doesn't require extensive configuration. You simply point your Web browser to the URL on the server that provides access to your mailbox. The URL varies according to how OWA is configured on the server, in addition to a few other considerations. For a detailed look at using OWA to access your Exchange Server mailbox, see Chapter 36, "Accessing Messages Through a Web Browser."

Configuring Windows Settings for Outlook

Although most of the settings you'll need to configure for Outlook are configured through the program itself, some settings in the underlying operating system have an impact on the way Outlook functions and displays your data. This section offers an overview of the settings you might consider reviewing or modifying for use with Outlook.

Display Settings

Because Outlook packs a lot of information into a relatively small amount of space, your display resolution has some impact on Outlook's usefulness. You should configure your system for at least an 800 x 600 desktop, preferably larger, depending on the size of your monitor. This is particularly important if you're using multiple Outlook windows at one time.

To configure properties for the display, you use the Display icon in Windows Control Panel. You can also right-click the desktop and choose Properties to open the Display dialog box.

tip

A handful of freeware and shareware applications are available that let you create multiple virtual desktops to expand your available desktop space. A search of your favorite shareware site should turn up at least one or two such utilities.

Regional Settings

The regional settings on your computer determine how the operating system displays time, dates, currency, and other localized data. Because Outlook uses these types of data extensively, configuring your regional settings properly is an important step in setting up for Outlook. This step is especially important for your calendar if you use multiple time zones. To configure regional settings, use the Regional Settings or Regional Options icon in Control Panel.

Time Synchronization

Much of your Outlook data is time-sensitive. For example, e-mail messages have sent and received times, and meetings are scheduled for specific periods. If your system's clock isn't accurate, some of that data won't be accurate. You should make sure that your clock is set correctly and that the system maintains the accurate time. You can set the time either by using the Date/Time icon in Control Panel or by double-clicking the clock in the system tray.

You also can use synchronization tools to synchronize your computer with a time server. Such tools are available as third-party utilities for use with all Microsoft Windows platforms, and a search of your favorite download site should turn up a few. In addition, Windows NT and Windows 2000 clients can take advantage of the Windows Time Service (W32Time) that allows client computers to synchronize their time with domain controllers on their network. If you're not familiar with W32Time, check with your system administrator for help in setting it up.

tip Synchronizing time in Windows NT domains

When Windows 2000 clients update their time on Windows NT domains, some compatibility issues can arise. If your Windows NT domain controllers use the Timeserv service, you need to upgrade to the W32Time service to allow Windows 2000 clients to participate. In addition, you need to make a few registry modifications on the Windows NT domain controller functioning as the time server to allow Windows 2000 clients to synchronize their times. See the Microsoft Knowledge Base article Q258059 for more information.

Using Add-Ins

Outlook provides tremendous functionality right out of the box and could well serve all your needs. But if you need additional features not provided directly by Outlook, *add-ins* can help to extend Outlook's functionality. Outlook includes a handful of such add-ins, and third-party developers can produce others.

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Outlook supports two types of add-ins: application-specific (standard) add-ins and COM add-ins. Standard add-ins are the type supported by earlier versions of Outlook, which allow a developer to add features to one Office application. Standard add-ins are not portable between Office applications. These add-ins are integrated into Outlook through dynamic-link libraries (DLLs).

COM add-ins use the Microsoft Component Object Model to allow shared functionality between the various Office applications. COM add-ins were added as new features in Office 2000 and are also available in Office XP. These add-ins are integrated into Office applications, including Outlook, through either DLLs or ActiveX controls.

You install add-ins when you install Office; the list of available add-ins depends on which options you select during installation. To view the installed add-ins, choose Tools, Options and click the Other tab. Click Advanced Options to open the Advanced Options dialog box. Click Add-In Manager to view, install, and enable or disable standard Outlook add-ins and click COM Add-Ins to view, install, and enable or disable COM add-ins and control their load behavior.

For more information on different add-ins available for use with Outlook, see Appendix E, "Outlook Add-Ins."

Chapter 4

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Using Categories and Types

One of the primary functions of Microsoft Outlook is to help you organize your data, whether that data is a collection of contacts, a task list, your schedule, or a month's worth of messages. To make this easier, you can use Outlook's *categories*, which are words or phrases you assign to Outlook items as a means of organizing the items. For example, you might assign the category Personal to a message from a family member, to differentiate it from your work-related messages, and then customize the view to exclude personal items.

This chapter explains how categories work in Outlook and shows you how to manage a Master Category List, add new categories, assign them to Outlook items, and use categories to arrange, display, and search Outlook data. You'll also learn about entry types, which work in concert with categories to give you even more flexibility in organizing your data.

Understanding Categories

If you've used a personal finance or checkbook program such as Microsoft Money or Intuit's Quicken, you're probably familiar with categories. In these programs, you can assign a category to each check, deposit, or other transaction and then view all transactions for a specific category, perhaps printing them on a report for tax purposes. For example, you might use categories to keep track of business expenses and separate them by certain criteria, such as reimbursement policy or tax deductions.

Outlook's categories perform essentially the same function: you can place data into categories and manipulate the data based on those categories. For example, you might use categories to assign Outlook items such as messages and tasks to a specific project. You could then quickly locate all items related

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to that project. Or you might use categories to differentiate personal contacts from business contacts. Whatever your need for organization, categories offer a handy and efficient way to achieve your goal.

What can you do with categories? After you assign a category to each relevant Outlook item, you can sort, search, and organize your data according to the category. Figure 4-1, for example, shows the Advanced Find dialog box after a search for all Outlook items assigned to the category Project Blue. Figure 4-2 shows the Contacts folder organized by category, displaying all contacts who work for ProseWare Corporation. The ability to search by category makes it easy to find all the items associated with a specific project, contract, issue, or general category.

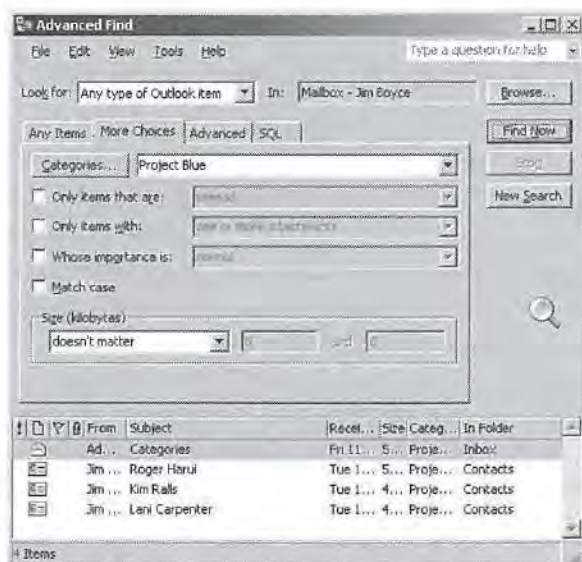
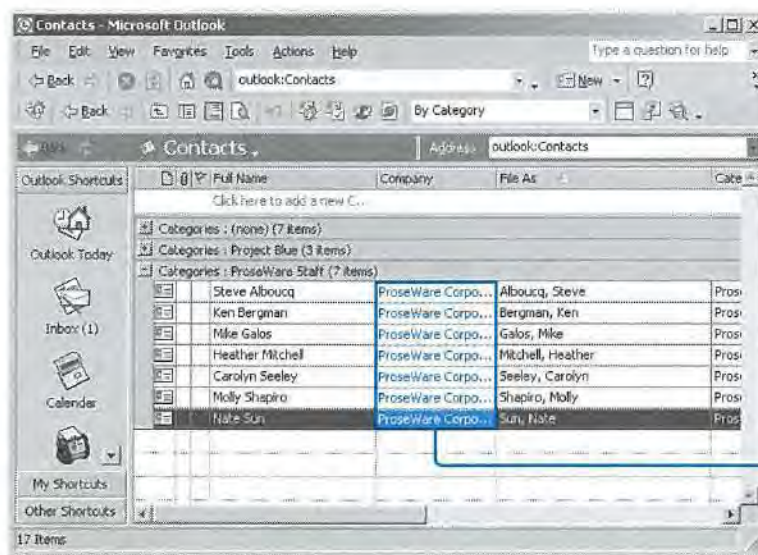


Figure 4-1. The Advanced Find dialog box displays the results of a search for all Project Blue items.



Contacts organized by company

Figure 4-2. You can group contacts by category to list all ProseWare staff.

Categories are useful only if you apply them consistently. After you become disciplined in using categories and begin to assign them out of habit, you'll wonder how you ever organized your day without them.

The Master Category List

Outlook maintains a Master Category List (MCL) that contains the default categories created by Setup when you install Outlook. The MCL is hard-coded and can't be changed. You can, however, modify your personal copy of the MCL, which is stored in the registry key

HKEY_CURRENT_USER\Software\Microsoft\Office\10.0\Outlook\Categories

The MCL serves as the basis for customizing your personal category list. The MCL contains several predefined categories that are useful in many situations, but your business or organization might need special categories not included with Outlook. You can customize the MCL to create your own category list with as many additional categories as you want, as the following section explains.

Customizing Your Personal Master Category List

Before you assign categories to Outlook items, you should go through the category list and add the categories you need. To determine which ones to add, spend some time thinking about how you intend to use them. Although you can always add categories later, creating the majority up front not only saves time but also helps you organize your thoughts and plan the use of categories more effectively.

Follow these steps when you're ready to create categories:

- 1 Open Outlook and then select any item (a message or a contact, for example).
- 2 Open the Categories dialog box by choosing Edit, Categories or by right-clicking the item and choosing Categories from the shortcut menu.
- 3 Click Master Category List to display the Master Category List dialog box, shown in Figure 4-3 on the next page.

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Figure 4-3. You can add a new category in the Master Category List dialog box.

- 4 Type the new category name in the New Category box, and click Add. Repeat this step to add other categories as needed.
- 5 Click OK when you've finished adding categories, and then click OK to close the Categories dialog box.

For information about creating new categories while you are assigning categories to an item, see the following section, "Assigning Categories to New Items."

The categories you add to your personal MCL depend entirely on the types of tasks you perform with Outlook, your type of business or organization, and your preferences. The following list suggests ways to categorize business-related data:

- Track items by project type or project name.
- Organize contacts by their type (for example, managers, assistants, technical experts, and financial advisors).
- Keep track of departmental assignments.
- Track different types of documents (for example, drafts, work in progress, and final versions).
- Track contacts by sales potential (for example, 30-day or 60-day).
- Organize items by priority.

The following list offers suggestions for categorizing personal data:

- Organize personal contacts by type (friends, family, insurance agents, legal advisors, and medical contacts, for starters).

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- Track items by area of interest.
- Organize items for hobbies.
- Track items related to vacation or other activities.

Assigning Categories to New Items

Assigning categories to items is easy. You can assign multiple categories to each item if needed. For example, a particular contact might be involved in more than one project, so you might assign a category for each project to that contact. If you have a task that must be performed for multiple projects, you might assign those project categories to the task.

To learn how to assign categories to existing items, see “Changing Category Assignments,” page 112.

Follow these steps to assign categories to a new item:

- 1 Open the form to create the item. (Click New with the folder open, for example.)
- 2 Use one of the following methods to display the Categories dialog box, depending on the type of item you’re creating:
 - **Message.** Click Options on the toolbar, and then click Categories.
 - **Calendar, contact, or task item.** Click Categories at the bottom of the form.

note Depending on your screen resolution you might need to maximize the form to see the Categories button.

- **Note.** You can’t assign a category initially. Instead, add the note, right-click it, and choose Categories; or select the note and choose Edit, Categories.
- 3 In the Categories dialog box, select all the categories that pertain to the item. If you need to add a category, just click in the Item(s) Belong To These Categories box, type the category name, and click Add To List. This adds the category to your personal MCL.
 - 4 Click OK to close the dialog box and continue creating the item.

As you can see in step 3, you don’t have to open the MCL to create new categories. Instead, you can create a category on the fly when you’re assigning categories to an item. Outlook will add the new category to your personal MCL. However, a drawback to

creating categories on the fly is that you might not enter the category names consistently. As a result, you could end up with more than one version of a given category. As you might expect, Outlook treats category names literally, so any difference between two names, however minor, makes those categories different. Searching for one won't turn up items assigned to the other. For this reason, it's a good idea to always select categories from the MCL rather than creating them on the fly.

Assigning Categories Automatically

You can easily assign categories when you create an item, but you might prefer to simplify the process for items that will be assigned to the same category (or set of categories). For example, if you frequently create e-mail messages that have specific category assignments, you could bypass the steps involved in adding the categories to each new message. You can accomplish this by using an e-mail template.

For a detailed discussion of templates, see Chapter 22, "Using Templates."

You can use templates for other Outlook items as well. Simply create the template, assign categories to it as needed, and then save it with a name that will help you easily identify the category assignments or the function of the template. When you need to create a message with that specific set of category assignments, you can create it from the template rather than from scratch. Because the category assignments are stored in the template, new items created from the template are assigned those categories. Using templates to assign categories not only saves you the time involved in adding categories individually but also ensures that the category assignments are consistent. (For example, you won't misspell a name or forget to add a category.)

Modifying Categories and Category Assignments

At some point, you'll want to recategorize Outlook items—that is, you'll want to add, remove, or modify their category assignments. For example, when one project ends and another begins, some of your contacts will move to a different project, and you'll want to change the categories assigned to the contact items. Perhaps you've added some new categories to further organize your data and want to assign them to existing items. Or perhaps you made a mistake when you created an item or assigned categories to it, and now you need to make changes. Whatever the case, changing categories and category assignments is easy.

Changing Existing Categories

For one reason or another, you might need to change a category. For example, you might have misspelled the category when you created it, or you might want to change the wording a little. You can't edit an existing category, but you can remove the cate-

Chapter 4: Using Categories and Types

gory and re-create it with modifications. For example, you might delete the category Fiends and create a new one named Friends to replace it (assuming that your friends are not really fiends).

Before you start changing categories, however, it's important to understand the ramifications. Changing a category doesn't modify the category for items to which it has already been assigned. If you remove the Fiends category from your MCL and replace it with Friends, any items previously assigned the Fiends category will still have that category assignment—Outlook won't automatically change them to the new category. However, Outlook also doesn't delete the category assignments of items whose categories are no longer in your MCL. Because the old categories remain associated with the item, you can still search based on the old category names. Therefore, when you change a category, you should search for all items using the old category and then change those items to assign the new category.

note Think of the MCL as a list that simplifies the assignment of categories by allowing you to pick preset categories from the list rather than entering them manually each time. The category text itself is associated with the item, so changes to the MCL don't affect the items to which categories have been assigned.

An earlier section, "Customizing Your Personal Master Category List" (page 107), explained how to create new categories. Because you can't edit a category but instead must replace it, changing a category is much like adding a new one.

Follow these steps to replace one category with another:

- 1 In Outlook, select any item and choose Edit, Categories.
- 2 Click Master Category List to display the Master Category List dialog box.
- 3 Enter the new category in the New Category box and click Add.
- 4 Scan through the category list to find the old category, select it, and click Delete.
- 5 Click OK to close the dialog box.

Resetting the MCL to Its Default Version

Assume that you've made substantial changes to your personal MCL, modifying or removing most of the original categories, and now you want to restore them. Resetting the MCL to its default version copies the default MCL to your personal list, causing all your custom categories to be removed. (Keep in mind that although this removes the categories from your personal MCL, it doesn't remove them from the items to which they are assigned.) You can then re-create the custom categories as needed in your personal MCL.

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Follow these steps to reset your personal MCL to the default copy:

- 1 In Outlook, select any item and choose Edit, Categories.
- 2 Click Master Category List.
- 3 Click Reset, and then click OK when prompted.
- 4 Click OK to close the MCL.

Changing Category Assignments

You can assign categories to an item at any time, adding and removing the ones you want.

To change the categories assigned to a specific item, follow these steps:

- 1 In Outlook, locate the item whose category assignment you want to change.
- 2 Select the item and choose Edit, Categories; or right-click the item and choose Categories from the shortcut menu.
- 3 In the Categories dialog box, add and remove categories as needed and click OK.

Changing Category Assignments of Multiple Items at One Time

In some cases, you'll want to change the category assignments of several items at one time. For example, assume that you've replaced a misspelled category name with the correct spelling. After you change the category list, any items to which you had assigned the old category will still have the incorrect spelling. You'll probably want to search for all items with the old category and assign the new one to them.

Follow these steps to do so:

- 1 In Outlook, choose Tools, Advanced Find.
- 2 In the Look For drop-down list, select the type of Outlook item for which you want to search.
- 3 In the Advanced Find dialog box, click the More Choices tab.
- 4 Type the old category name in the box beside the Categories button, and click Find Now.
- 5 In the search results area, select all the items whose categories you want to change. (Use Shift+Click or Ctrl+Click to select them.) Then click Edit, Categories.
- 6 In the Item(s) Belong To These Categories list, highlight the portion of the category you want to change, retype it, and click OK. Outlook reassigns the categories accordingly.

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tip Change a single category

If an item is assigned multiple categories, Outlook doesn't make changes to any categories that don't appear in the Item(s) Belong To These Categories list. You can change a single category without changing others.

Organizing Data with Categories

Now that you've created your personal MCL and faithfully assigned categories to all your data in Outlook, how do you put those categories to work for you? The previous section, which explained how to search for items with given categories, is a good example of how you can use categories to organize and sort your data: by specifying the categories in question in the Advanced Find dialog box, you can compile a list of items to which those categories have been assigned.

You also can sort items by category. To do so, follow these steps:

- 1 Open the folder containing the items you want to sort. If the Categories field isn't displayed, right-click the column bar and choose Field Chooser.
- 2 Drag the Categories field to the column bar.
- 3 Right-click the Categories column and choose Group By This Field.

Sharing a Personal Category List

If you work in a department, or if you share similar tasks and responsibilities with others, it's helpful to be able to share the same set of categories with those other users. Doing so helps to ensure that everyone is using the same categories, an important point when you're sharing items or receiving items from others that have categories assigned to them. For example, assume that your department is working on a handful of projects. Having everyone use the same project category names helps you organize your Outlook items and ensures that searches or sorts based on a given project will display all items related to the project, including those you've received from others.

Exporting Your Personal MCL

As mentioned earlier, Outlook stores your personal MCL in the registry rather than as a file. This means you can't simply share a file to share your categories. Instead, you must use one of two methods to share your category list:

- You can export the registry key containing the categories and have all other users import that key into their registries.
- You can use an e-mail to copy categories. For details on this method, see "An Alternative to the Registry Solution," page 115.

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The following steps outline the registry method, which copies the entire MCL:

- 1 Choose Start, Run. Type **regedit** in the Run dialog box (see Figure 4-4), and then click OK.

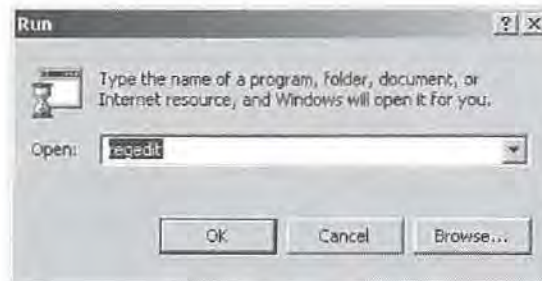


Figure 4-4. Start the Registry Editor in the Run dialog box.

- 2 Locate and select the key `HKEY_CURRENT_USER\Software\Microsoft\Office\10.0\Outlook\Categories`.
- 3 Choose Registry, Export Registry File.
- 4 Specify a path and file name to save the file, verify that the Selected Branch option is selected, and click Save.

At this point you have a registry file that other users can use to import the MCL to their systems, as explained in the next section.

caution It's important to exercise care when working with the registry. Incorrect changes could cause problems ranging from minor data loss to application crashes or the inability to boot your computer.

Importing Categories

Exporting a registry key to a file creates a text file with a REG file extension. Others can then import the Categories key into their systems by double-clicking the registry file containing the Categories key or by using the import function in the Registry Editor. However, the specific process for importing the categories depends on the version of Outlook used to create the registry file and the version into which the file is being imported.

If you view the registry file in a text editor such as Notepad or WordPad, you'll find that the file contains the registry key where the categories should be stored. For Outlook 2002, this key is

HKEY_CURRENT_USER\Software\Microsoft\Office\10.0\Outlook\Categories

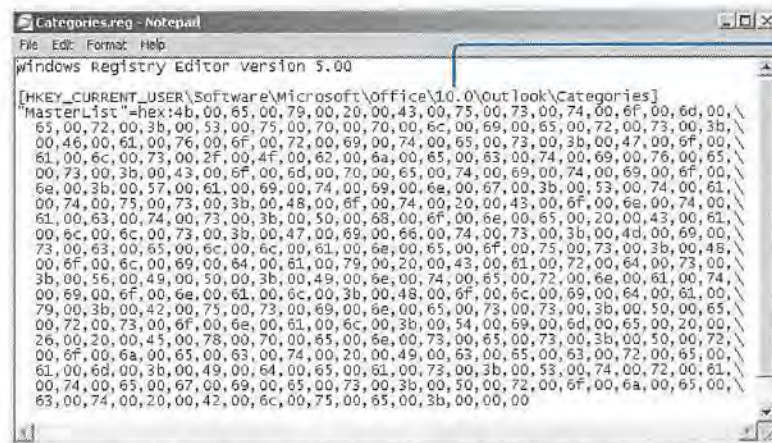
For earlier versions of Outlook, the key is slightly different, distinguished by the value that immediately follows the Office value. For example, Outlook 2000 uses the registry

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key `HKEY_CURRENT_USER\Software\Microsoft\Office\9.0\Outlook\Categories` to store category entries.

Before you import a registry key containing categories into your own system, verify the Outlook version you're using and the key into which the categories need to be imported. For example, if you're importing categories from an earlier version of Outlook into Outlook 2002, you need to modify the registry file to place the information in the 10.0 key. If you're copying categories from Outlook 2002 into an earlier version, you need to change 10.0 to the version being imported.

To make the change before you import, open the registry file in Notepad or WordPad. As you can see in Figure 4-5, the registry key is specified near the beginning of the file. Change the key name to reflect the appropriate destination key, save the file, and then import it into the target system. You can import the key by double-clicking it, or you can open the Registry Editor as explained previously and choose Registry, Import Registry File.



Key name should reflect the Outlook version running on the target system

Figure 4-5. You can open a registry script in Notepad.

caution When you import the registry file, your existing categories are lost. See the following section for an alternative method if you want to retain your existing custom categories while also adding others from another user.

An Alternative to the Registry Solution

When you import a registry file, the existing categories in your MCL are replaced, not supplemented. This means you'll lose any custom categories you had added to your MCL before the import. To get around this problem, the person who originates the shared categories can create an e-mail message, assign all categories to the message, and then send it to others for import into their MCLs.

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To use this method of sharing categories, follow these steps:

- 1 On the source system for the categories, create a new mail message addressed to all users who need a copy of the categories.
- 2 In the message form, click Options and assign all custom categories (or only those to be shared) to the message.
- 3 Send the message.
- 4 On a receiving system, select the message and choose Edit, Categories; or right-click the message and choose Categories.
- 5 In the Categories dialog box, highlight all the categories in the Item(s) Belong To These Categories list and press Ctrl+C to copy them to the clipboard (see Figure 4-6).

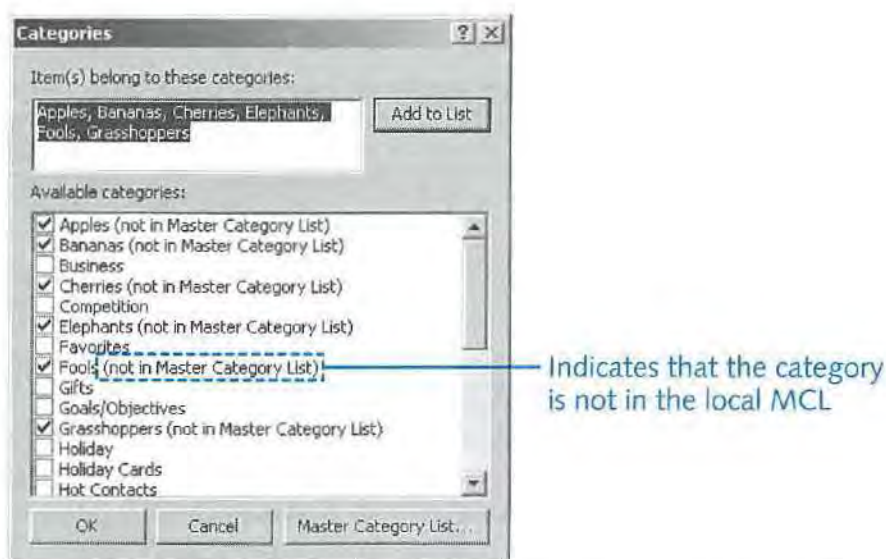


Figure 4-6. The selected categories are from a message being imported to the local MCL.

- 6 Click Master Category List, click in the New Category box, and press Ctrl+V to copy the categories to the box. Click Add to add them to the MCL.

tip To make sure everyone can import the categories successfully, include instructions in the body of the e-mail message explaining how to import the categories.

note As shown in Figure 4-6, Outlook identifies categories for the selected e-mail message that are not stored in the local MCL.

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Using Entry Types

You can assign categories to all Outlook items to provide a means of sorting and organizing those items. The journal is no exception: each journal item can have multiple categories assigned to it. Journal items, however, can also be classified by *entry type*, which defines the purpose of the journal item. In many respects, entry types are like categories, because you can use them to sort and search for journal items.

When you create a journal item manually, Outlook assumes that you're creating a phone call journal entry and automatically selects Phone Call as the entry type. However, you can select a different entry type from the Entry Type drop-down list. Figure 4-7 shows the majority of the available entry types.

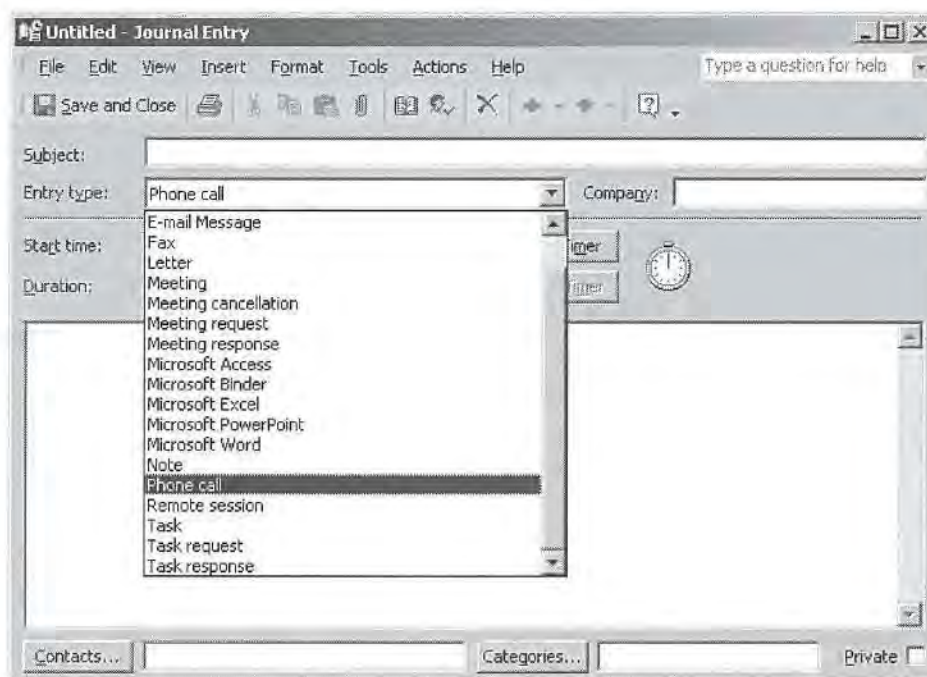


Figure 4-7. You can select entry types only from a predefined list.

Unlike categories, which you can create on the fly, journal entry types are limited to those types found in Outlook's predefined list. Although the default entry types cover a lot of bases, they don't offer much flexibility. For example, you might want to use the journal to track your activity in an application that isn't included on the list, or you might need to keep track of trips to the doctor, school programs, or other events. Although you don't have the ability to add entry types directly when you create a journal entry, you can modify the registry to add journal entry types.

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Here's how:

- 1 Open the Registry Editor. (Choose Start, Run; type **regedit**; and click Open.)
- 2 Open the key HKEY_CURRENT_USER\Software\Microsoft\Shared Tools\Outlook\Journaling.
- 3 Right-click Journaling and choose New, Key.
- 4 Rename the key based on what the new entry type will be. For example, you might name it **Dr. Visit**.
- 5 Right-click the key you just created and choose New, String Value. Rename the string value **Description**.
- 6 Double-click the Description value just created, and set its value to the text you want to appear in the Entry Types drop-down list, such as **Dr. Visit**.
- 7 Close the Registry Editor.

After you have edited the registry to add the new entry type, it should appear on the journal entry form in the Entry Type drop-down list.

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Managing Address Books and Distribution Lists

An e-mail program isn't very useful without the ability to store addresses. Microsoft Outlook, like other e-mail-enabled applications, has this storage ability. In fact, Outlook offers multiple address books that can help make sending messages easy and efficient.

This chapter explores how Outlook stores addresses and explains how Outlook interacts with Microsoft Exchange Server (which has its own address lists) to provide addressing services. You'll learn how to store addresses in Outlook's Contacts folder and use them to address messages, meeting requests, appointments, and more. You'll also learn how to create distribution lists to broadcast messages and other items to groups of users and how to hide the details of the distribution list from recipients. The chapter concludes with a look at how you can share your address books with others.

Although this chapter discusses the Outlook Contacts folder in the context of address lists, it doesn't cover this folder in detail. For a detailed discussion of using and managing the Contacts folder, see Chapter 14, "Managing Your Contacts."

Understanding Address Books

As you begin working with addresses in Outlook, you'll find that you can store them in multiple locations. For example, if you're using an Exchange Server account, you have a couple of locations from which to select addresses. Understanding where these address books reside is an important first step in putting them to work for you. The following sections describe the various address books in Outlook and how you can use them.

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Outlook Address Book

On all installations, including those with no e-mail accounts, Outlook creates a default Outlook Address Book (OAB). This address book consolidates all your Outlook contacts folders. With a new installation of Outlook, the OAB shows only one location for storing addresses: the default Contacts folder. As you add other contacts folders, those additional folders appear in the OAB, as shown in Figure 5-1. As you'll learn in "Removing Contacts Folders from the OAB," page 127, you can configure additional contacts folders so that they don't appear in the OAB.

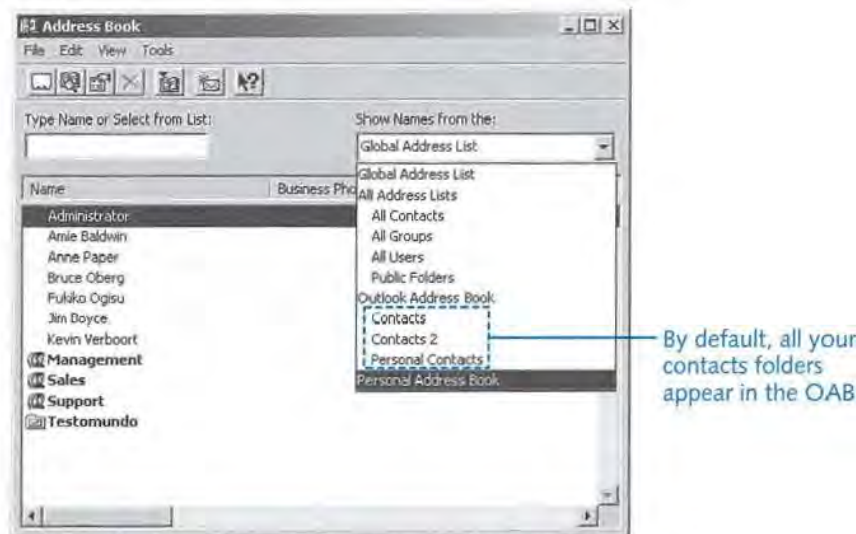


Figure 5-1. The OAB shows all contacts folders for your profile.

For detailed information on creating and using additional contacts folders, see "Creating Other Contacts Folders," page 386.

The OAB functions as a virtual address book rather than as a physical one because Outlook doesn't store the OAB as a file separate from your data store. Rather, the OAB provides a view into your contacts folders. When you add contact entries to the OAB, you're actually adding them to the Outlook Contacts folder. Because of this, you have all the same options for creating contact entries in the OAB as you do in the folder—the OAB and the Contacts folder are essentially one and the same.

Personal Address Book

You can add one Personal Address Book (PAB) to a profile and use the PAB to store additional contact information. Unlike the OAB, a PAB is a physical address book that Outlook stores on disk separate from your data store. The PAB uses a PAB file extension, and Outlook creates the file when you add the PAB to your profile.

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To learn how to add a PAB to a profile, see "Adding a Personal Address Book," page 125.

The PAB doesn't function as a hook into your Contacts folder, so you don't have the same options for creating an entry in the PAB that you do in the Contacts folder. Figure 5-2 shows the New Internet Address Properties dialog box, which Outlook provides for creating new entries in a PAB. As you can see, you can't save the same amount of data for a contact in the PAB as you can in the Contacts folder.

For more information on creating contacts and their available options, see "Creating a Contact Entry," page 383.

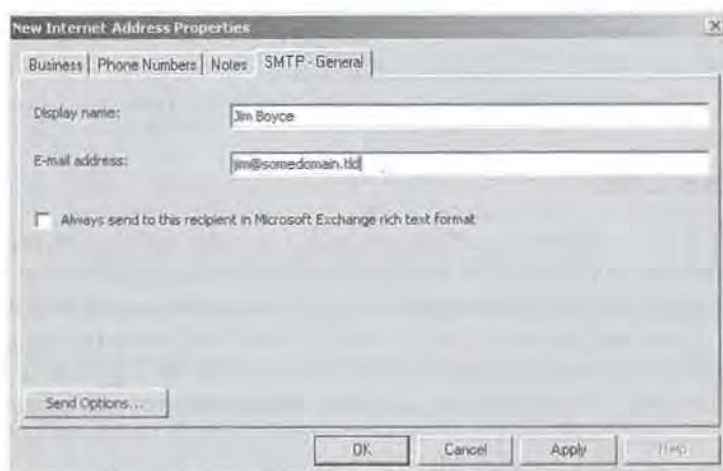


Figure 5-2. The form for creating a PAB entry doesn't include the same information as a form in the Contacts folder.

Even though the PAB doesn't store the same amount of information as an item in the Contacts folder, it's still a useful feature. You can use the PAB to store personal addresses or other contact information that you want to keep separate from your other Outlook data. Plus, you can use a PAB to share addresses with other users.

Global Address List

When you use a profile that contains an Exchange Server account, you'll find one other address list in addition to the OAB and PAB: the Global Address List (GAL). This address list resides on the Exchange Server and presents the list of mailboxes on the server as well as other address items created on the server, including distribution groups and external addresses (see Figure 5-3 on the next page). You can't create address information in the GAL, as you can in the other types of address books, however; only the Exchange Server system administrator can do this.



Figure 5-3. The Global Address List shows addresses on the Exchange Server.

Other Address Lists

In addition to the OAB, PAB, and GAL, you might see other address sources when you look for addresses in Outlook. For example, in an organization with a large address list, the Exchange Server system administrator might create additional address lists to filter the view to show only a selection, such as contacts with last names starting with the letters A through D or contacts external to the organization (see Figure 5-4). You might also see a list named All Address Lists. This list, which comes from Exchange Server, can be modified by the Exchange Server administrator to include additional address lists.

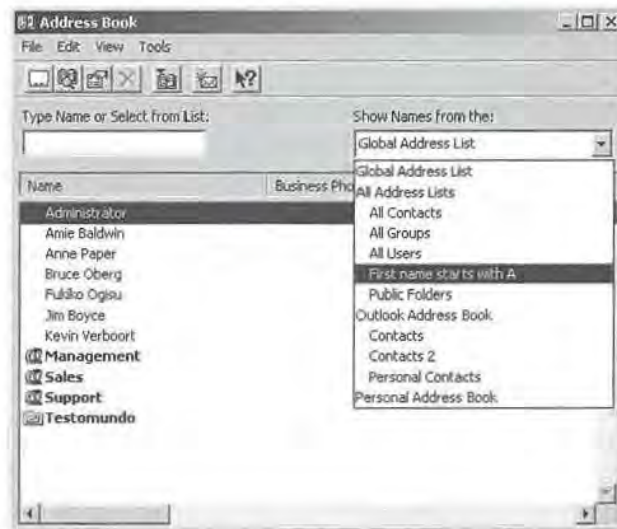


Figure 5-4. Additional address lists can display filtered lists of contacts.

Configuring Address Books and Addressing Options

Outlook offers a handful of settings you can use to configure the way your address books display contacts and address information. You also can add personal address books and choose which address book Outlook uses by default for opening and storing addresses and processing messages.

Adding a Personal Address Book

You might decide to add a personal address book to store addresses outside your Contacts folder. For example, you might use the PAB to store personal addresses separately from work addresses.

Follow these steps to add a PAB to your profile:

- 1 Close Outlook, right-click the Outlook icon on the desktop, and choose Properties. (Alternatively, you can use the Mail icon in Control Panel.)
- 2 Click E-Mail Accounts to start the E-Mail Accounts Wizard.
- 3 Select Add A New Directory Or Address Book and click Next.
- 4 Select Additional Address Books and click Next.
- 5 Select Personal Address Book and click Next.
- 6 Set properties for the new address book and click OK.
- 7 Click OK to close the Properties dialog box.
- 8 Restart Outlook to use the new address book.

Setting Options for the Outlook Address Book

You can set only one option for the OAB. This setting controls the order in which Outlook displays names from the OAB—either Firstname, Lastname or Lastname, Firstname.

Follow these steps to set this display option:

- 1 If Outlook is open, choose Tools, E-Mail Accounts to start the E-Mail Accounts Wizard. If Outlook is not open, right-click the Outlook icon on the desktop, choose Properties, and then click E-Mail Accounts.
- 2 Select View Or Change Existing Directories Or Address Books and click Next.
- 3 Select Outlook Address Book and click Change to display the Microsoft Outlook Address Book dialog box, shown in Figure 5-5 on the next page.

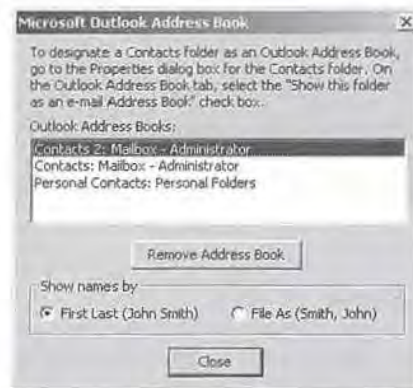


Figure 5-5. Select the format for OAB entries in the Microsoft Outlook Address Book dialog box.

- 4 In the Show Names By box, select the display format you prefer. Click Close, and then click Finish.

Setting Options for the Personal Address Book

For the PAB, you can select a format for displaying names, change the display name for the address book, specify a path to a different file, or include optional notes with the address book.

tip Specify a different path

When you need to place the PAB on a network share to make it available when you log on from other locations, and the file is not located in your Microsoft Windows profile folders, you might want to specify a path other than the default for the PAB. You might also change paths to select an existing PAB.

Follow these steps to configure the PAB:

- 1 If Outlook is open, choose Tools, E-Mail Accounts to start the E-Mail Accounts Wizard. If Outlook is not open, right-click the Outlook icon on the desktop, choose Properties, and then click E-Mail Accounts.
- 2 Select View Or Change Existing Directories Or Address Books and click Next.
- 3 Select Personal Address Book and click Change to display the Personal Address Book dialog box, shown in Figure 5-6.
- 4 To change the name of the address book that appears in Outlook, type the name you want to use in the Name box on the Personal Address Book tab.
- 5 In the Path box, type a path name or click Browse to specify the path to the PAB file.

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Figure 5-6. The Personal Address Book dialog box offers several configuration choices.

- 6** Choose one of the Show Names By options to specify how you want the names displayed in the PAB.
- 7** On the Notes tab of the dialog box, add optional notes to be stored with the PAB. These notes are visible only in the Personal Address Book dialog box.

Removing Contacts Folders from the OAB

In most cases, you'll want all your contacts folders to appear in the Outlook Address Book. If you have several contacts folders, however, you might prefer to limit how many folders appear in the OAB. Or you might simply want to restrict the folders to ensure that specific addresses are used.

You can set the folder's properties to determine whether it appears in the OAB by following these steps:

- 1** Open Outlook and open the folders list. Then right-click the contacts folder in question and choose Properties.
- 2** Click the Outlook Address Book tab and clear the Show This Folder As An E-Mail Address Book option to prevent the folder from appearing in the OAB.
- 3** Change the folder name if necessary and then click OK.

Setting Other Addressing Options

You can configure other addressing options to determine which address book Outlook displays by default for selecting addresses, which address book is used by default for storing new addresses, and the order in which address books are processed when

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Outlook checks names for sending messages. The following sections explain these options in detail.

Selecting the Default Address Book for Lookup

To suit your needs or preferences, you can have Outlook display a different address list by default. For example, for profiles that include Exchange Server accounts, Outlook displays the Global Address List by default. If you use the GAL only infrequently and primarily use your contacts folders for addressing, you might prefer to have Outlook show the OAB as the default address list rather than the GAL. Or you might want to display a filtered address list other than the GAL on the server.

Follow these steps to specify the default address list:

- 1 In Outlook, choose Tools, Address Book or click the Address Book icon on the toolbar. Outlook displays the Address Book window (see Figure 5-7).

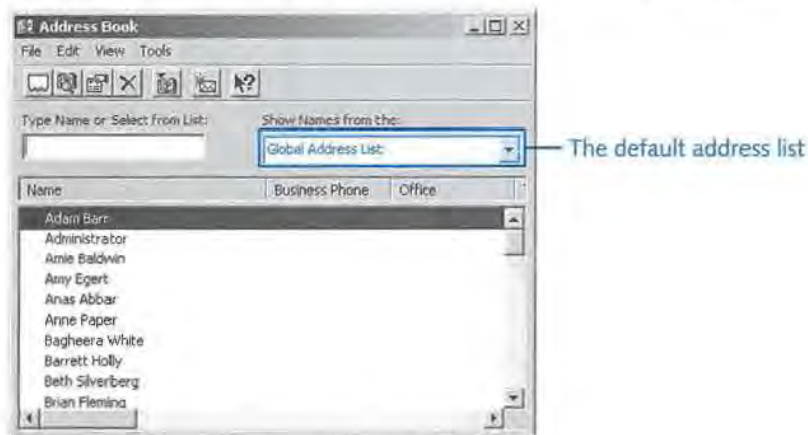


Figure 5-7. You can specify the default address list in the Address Book window.

- 2 Choose Tools, Options.
- 3 In the Addressing dialog box, select the default address list from the Show This Address List First drop-down list.
- 4 Click OK.

Specifying the Default Address Book for New Entries

You can choose which address book you want to use for personal addresses. Although you can't store these addresses in the GAL or other server address books, you can store them in either your OAB or PAB. When you create a new address in the New Entry dialog box, Outlook suggests storing the entry in the address book you have chosen as the

Chapter 5: Managing Address Books and Distribution Lists

default. If you want to store a particular address in a different address book, you can do so by clicking the In The option and selecting the address book from the drop-down list (see Figure 5-8).

note The OAB is the default location for storing personal addresses because the profile will not include a PAB unless you add one. Keep in mind, however, that you don't actually store addresses in the OAB itself. Rather, you store addresses in your Contacts folder, which appears as your OAB.



Figure 5-8. Use the New Entry dialog box to determine where to store addresses.

Follow these steps to specify the default location for storing new personal addresses:

- 1 Open the Address Book window and choose Tools, Options.
- 2 Select the default address location for personal addresses from the Keep Personal Address In drop-down list.
- 3 Click OK.

Specifying How Names Are Checked

When you create a message, you can specify the recipient's name rather than specifying the address. Rather than typing `jimb@domain.tld`, for example, you might type **Jim Boyce** and let Outlook convert the name to an address for you. This saves you the time of opening the address book to look for the entry if you know the name under which it's stored.

When you click Send to process the message, Outlook checks the address book(s) to determine the correct address based on the name you entered. Outlook checks names from multiple address books if they are defined in the current profile. For example, Outlook might process the address through the GAL first, then through your OAB, and then through the PAB (assuming that all three are in the profile). If Outlook finds a

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match, it replaces the name in the message with the appropriate address. If it doesn't find a match or finds more than one, it displays the Check Names dialog box, shown in Figure 5-9, where you can select the correct address, create a new one, or open the address book to display more names and then select an address.

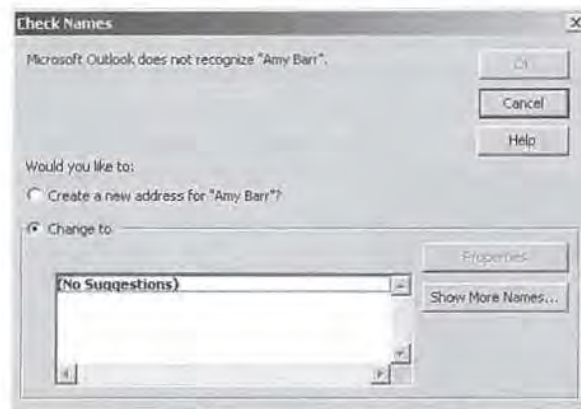


Figure 5-9. The Check Names dialog box helps you resolve address problems before you send a message.

Why change the order in which Outlook checks your address books? If most of your addresses are stored in an address book other than the one Outlook is currently checking first, changing the order can speed up name checking, particularly if the address book contains a lot of entries.

Here's how to change address book order:

- 1 In Outlook, open the Address Book window and choose Tools, Options.
- 2 Click the up and down arrow buttons that appear with the When Sending Mail list to rearrange the address book order in the list.
- 3 Click OK to close the dialog box.

Managing Contacts in the Personal Address Book

You can add entries for people and their corresponding addresses either in your contacts folders or in the PAB. You can add the address when you're creating a message, or you can work directly in the address book without opening or starting a message. This section of the chapter explains how to create address book entries in the PAB.

To learn how to create contact entries in your contacts folders, see "Creating a Contact Entry," page 383.

Creating Address Book Entries

To create an entry while you're composing a message, click the To, Cc, or Bcc button beside the corresponding box in the message form to display the Select Names dialog box (see Figure 5-10). Then click New to display the New Entry dialog box. You can also open the New Entry dialog box directly from the PAB. To do this, open the address book and click the New Entry button on the toolbar or choose File, New Entry.

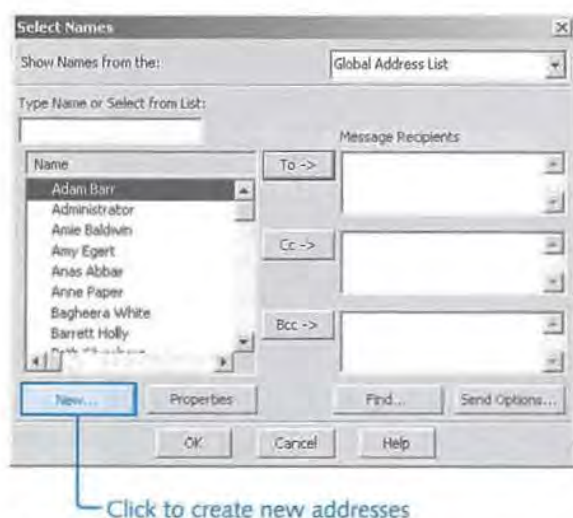


Figure 5-10. The Select Names dialog box leads you to the New Entry dialog box.

In the New Entry dialog box, select the type of address you want to create and click OK. The resulting dialog box depends on the type of address you selected. Figure 5-11 on the next page shows the dialog box for an Internet address.

note If you don't have the PAB set as the default location for new addresses, you won't be able to select an address type. You can change the default address location, create the entries, and then change the default location back if necessary.

Most of the address fields on Figure 5-11, such as name and phone number, are self-explanatory. After you enter the basic information, you can also set options for Internet address types that define how Outlook should send the message. On the SMTP-General tab, click Send Options to display the Send Options For This Recipient Properties dialog box shown in Figure 5-12 on the next page. Select I Want To Specify The Format For Messages To This Recipient, and then set options from the following list:

- **MIME.** Select this option to send the message using MIME. This is the default option and should work for most recipients.
- **Plain Text.** Select this option to always send the message body as plain text.

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- **Include Both Plain Text And HTML.** Select this option to send the message body as both plain text and HTML.
- **HMTL.** Select this option to send the message body using only HTML.
- **Plain Text/UUEncode.** Select this option to send the message using plain text and encoding for attachments rather than MIME.
- **BINHEX.** Select this option to use BINHEX for Macintosh attachments.

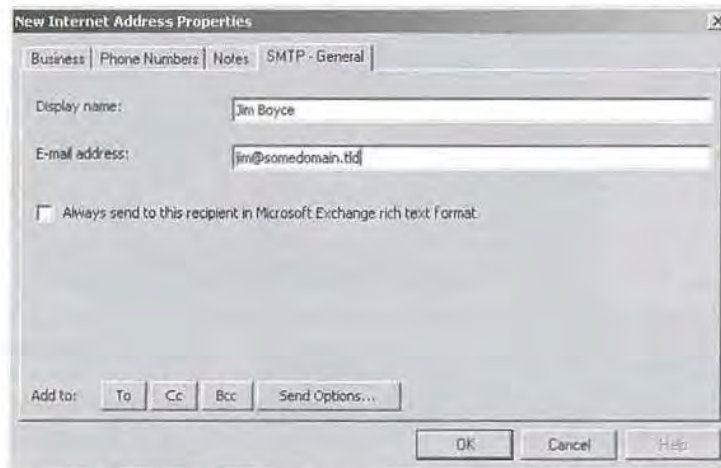


Figure 5-11. Use the New Internet Address Properties dialog box to enter information and set the format for a new Internet address.

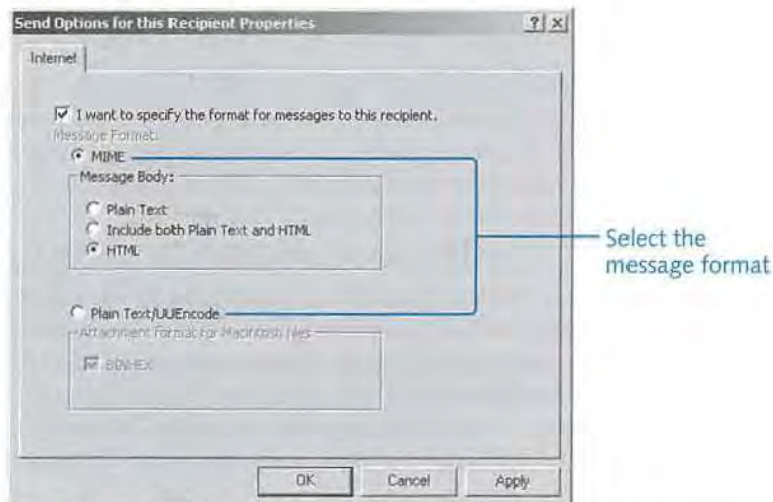


Figure 5-12. You can select sending options for Internet addresses.

Modifying Addresses

You can modify any addresses stored in your own address books, as well as in the address books of other users for which you have the appropriate access. You can modify an address while working with a form or while working directly in the address book. If you're using a message form, click the To, Cc, or Bcc button. Select the address you want to change and click Properties. If you're working in the address book instead, select the address and click Properties on the toolbar. Choose File, Properties or right-click the address and choose Properties. Outlook displays the same form you used to create the message. Make the changes you want and click OK.

Removing Addresses

Removing a contact from the PAB is much easier than creating one. Open the address book, select the address you want to delete, and click the Delete button on the toolbar or press the Delete key.

Finding People in the Address Book

If your address book contains a lot of addresses, as might be the case in a very large organization, it can be a chore to locate an address if you don't use it often. Outlook provides search capability in the address book to overcome that problem, making it relatively easy to locate addresses based on several criteria.

Follow these steps to locate an address in any address book:

- 1 Click the Address Book button on the toolbar to open the address book.
- 2 In the Show Names drop-down list, select the address book you want to search.
- 3 Click the Find Items button on the toolbar or choose Tools, Find to display the Find dialog box, shown in Figure 5-13 (for Exchange Server address lists) or Figure 5-14 (for the OAB and PAB) on the next page.
- 4 If you're searching an address list on the Exchange Server, decide what criteria you want to use and enter data in the fields to define the search. If you're searching an OAB or your PAB, specify the text to search for, which must be contained in the contact's name.
- 5 Click OK to perform the search.

Part 2: Messaging

The 'Find' dialog box in Outlook, titled 'Find', has a 'General' tab. It contains several text input fields for search criteria: 'Display name:', 'First name:', 'Last name:' (with 'Boyce' entered), 'Title:', 'Alias:', 'Company:' (with 'Proseware' entered), 'Department:', 'Office:', and 'City:'. At the bottom right are 'OK' and 'Cancel' buttons.

Figure 5-13. Use the Find dialog box to locate people in the address book.

The 'Find' dialog box in Outlook, titled 'Find', has a 'General' tab. It features a single search field labeled 'Find names containing:' with 'Boyce' entered. At the bottom are 'OK', 'Cancel', 'Apply', and 'Help' buttons.

Figure 5-14. The Find dialog box offers only a single search field for OAB and PAB searches.

When you click OK, Outlook performs a search in the selected address book based on your search criteria and displays the results in the Address Book window. You can revert to the full address book list by selecting the address book from the Show Names drop-down list. Select Search Results from the Show Names drop-down list to view the results of the last search.

tip Use a directory service

In addition to searching your address books, you also can search a *directory service* for information about contacts. A directory service is a server that answers queries about data (typically contact information) stored on the server. For detailed information on setting up and using directory services in Outlook, see "Configuring a Directory Service Account in Outlook," page 422.

Using Distribution Lists

If you often send messages to groups of people, adding all their addresses to a message one at a time can be a real chore, particularly if you're sending the message to a lot of recipients. As in other e-mail applications, *distribution lists* in Outlook help simplify the process, allowing you to send a message to a single address and have it broadcast to all recipients in the group. Rather than addressing a message to each individual user in the sales department, for example, you could address it to the sales distribution group. Outlook (or Exchange Server) takes care of sending the message to all the members of the group.

You can create distribution lists in either the OAB or your PAB. You also can use distribution lists that reside in the Exchange Server address lists, although you can't create distribution lists in the GAL or other Exchange Server address lists—only the Exchange Server system administrator can create the distribution lists on the server. However, you can modify distribution lists on the Exchange Server if you're designated as the owner of the list.

For a discussion of server-side distribution lists and how to create them, see "Creating Distribution Groups," page 772.

Creating Distribution Lists

Setting up a distribution list in your PAB or OAB is a relatively simple procedure. You can create a distribution list using addresses from multiple address books, which means, for example, that you might include addresses from the GAL on the Exchange Server as well as personal addresses stored in your Contacts folder and PAB. You can also include addresses of different types (for example, Exchange Server addresses, Internet addresses, and X.400 addresses). In general, it's easiest to set up a distribution list if all the addresses that will be included already exist, but you can enter addresses on the fly if needed.

Follow these steps to create a distribution list:

- 1 Open the address book.
- 2 Click the New Entry button or choose File, New Entry.
- 3 In the drop-down list, select the address book in which you want to store the distribution list.
- 4 In the Select The Entry Type list, select Personal Distribution List or New Distribution List (the option that is displayed varies according to address book type), and then click OK.
- 5 If you are creating the distribution list in the PAB, Outlook displays the dialog box shown in Figure 5-15 on the next page. If you are creating the distribution list in one of your contacts folders, you'll see a dialog box that is somewhat different, as shown in Figure 5-16.

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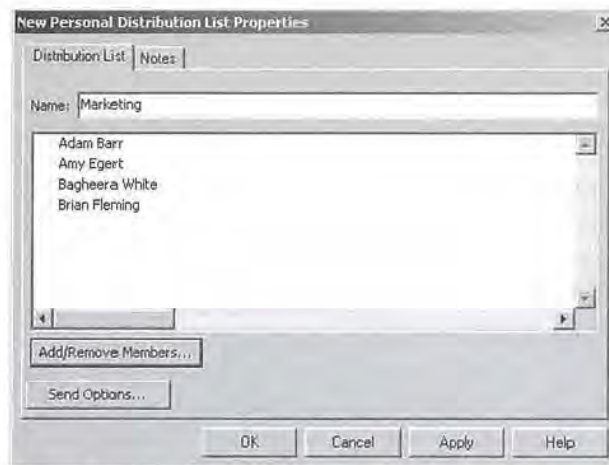


Figure 5-15. Use the Distribution List tab to set up a PAB distribution list.

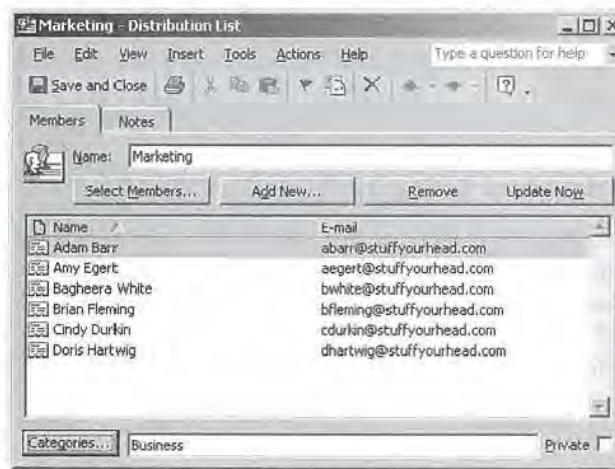


Figure 5-16. Use the Distribution List dialog box for an OAB distribution list.

- 6 In the Name box, specify a name for the list. This is the distribution list name that will appear in your address book.
- 7 For a PAB distribution list, click Add/Remove Members. For an OAB list, click Select Members. Either action opens the Select Members dialog box (see Figure 5-17).
- 8 Add members as needed, or click Add New in the Distribution List dialog box to enter new addresses if the addresses don't already exist in one of your address books. Click OK when you've finished adding members to the list.
- 9 Set other options as needed for the distribution list—for example, you can assign categories to the list.
- 10 For a PAB list, click OK on the Distribution List tab; for an OAB list, click Save And Close in the Distribution List dialog box.

Chapter 5: Managing Address Books and Distribution Lists

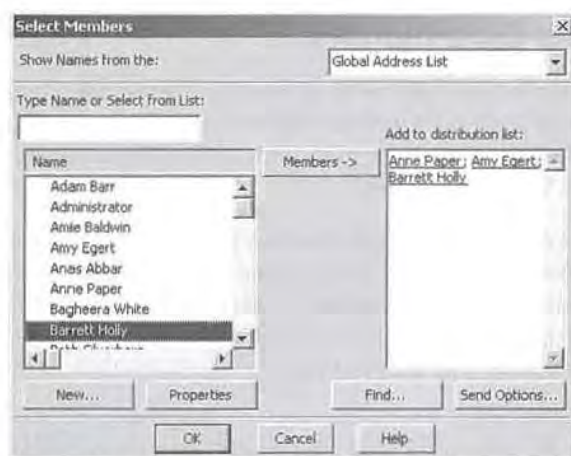


Figure 5-17. Add members to the distribution list by using the Select Members dialog box.

note You can't assign categories to a personal distribution group created in the PAB. However, you can assign certain other per-recipient properties depending on the address type for PAB entries.

Distribution lists appear in the address book with a group icon and a boldface name to differentiate them from individual addresses (see Figure 5-18).

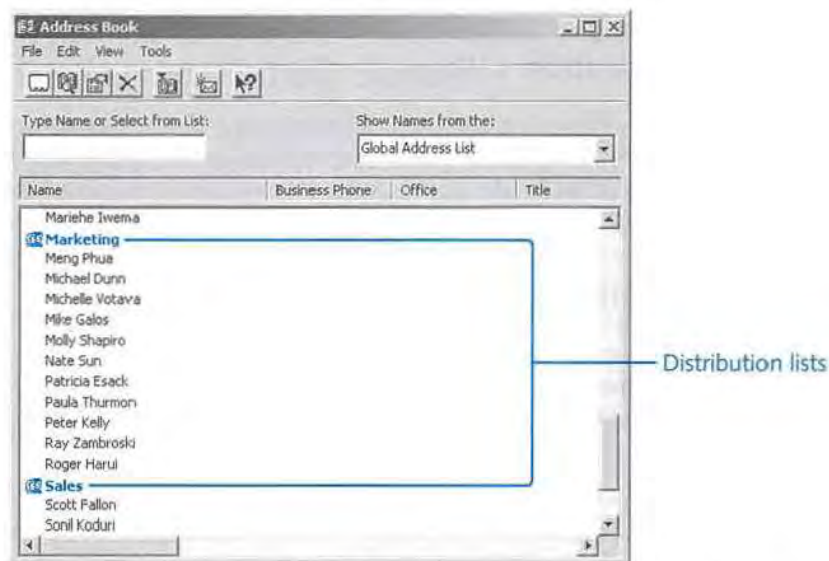


Figure 5-18. Outlook differentiates between addresses and distribution lists in the address book.

Creating a Contacts Distribution List

You can use the procedure just described to create a distribution list in your Contacts folder using addresses from the Contacts folder, your PAB, or address lists on Exchange Server. You also can create distribution lists within the Contacts folder rather than creating them through the address book.

To do so, open the Contacts folder, right-click any area of the folder other than a contact entry, and choose New Distribution List. Alternatively, with the Contacts folder open, click New, Distribution List on the toolbar or choose File, New, Distribution List. Any of these actions opens the Distribution List dialog box. Then continue by following the procedure described in the previous section.

note In a contacts folder, distribution lists look just like addresses, although Outlook displays a distribution list in the address list with a group icon and with the distribution list name in bold.

Modifying a Distribution List

Your distribution lists will probably be dynamic rather than static, meaning you'll need to add or remove names. To modify the contents of a list, locate the distribution list in the address book or in your Contacts folder, open the list, and then use the Select Members button (for an OAB list) or the Add/Remove Members button (for a PAB list).

Renaming a Distribution List

You can change the name of a distribution list any time after you create it to reflect changes in the way you use the list, to correct spelling, or for any other reason. To rename a distribution list, locate the list in the address book, open it, and then change the name in the Name box. Close the distribution list to apply the change.

Deleting a Distribution List

You can delete a distribution list the same way you delete an address. Locate the distribution list in the address book or contacts folder, select it, and then click the Delete button on the toolbar or press Delete. Alternatively, you can right-click the list and choose Delete from its shortcut menu.

note Deleting a distribution list doesn't delete the addresses associated with the list.

Hiding Addresses When Using a Distribution List

If you include a distribution list in the To or Cc box of a message, all the recipients of your message—whether members of the distribution list or not—can see the addresses of individuals in the list. Outlook doesn't retain the list name in the address field of the message but instead replaces it with the actual addresses from the list.

In some cases, the members of a distribution list might not want to have their addresses made public, even to other members of the list. In these situations, address the message using the Bcc box rather than the To or Cc box. To display the Bcc box in the message form, click the arrow beside Options on the toolbar and choose Bcc. Then enter in the Bcc box all addresses and distribution lists that should remain hidden.

Using Distribution Lists on a Server

You can use distribution lists on the Exchange Server—which are set up by the system administrator—the same way you use local distribution lists to simplify broadcasting messages to multiple recipients. (As mentioned earlier, you can't create distribution lists in the GAL or other Exchange Server address lists from Outlook, although you can modify such a list if you are designated as the list owner.)

You can use a server-side distribution list the same way you use a local distribution list. Select the list from the appropriate address list on the server. The list name will be converted to addresses when you send the message, just as a local distribution list is.

Differences Between Exchange Server 5.5 and Exchange 2000 Server

Distribution lists in Exchange 2000 Server are different from those in Exchange Server 5.5. Exchange Server 5.5 uses a dedicated directory structure and a distribution list object that is separate from security groups. Exchange 2000 Server uses the Active Directory and automatically uses security groups as distribution lists. With Windows 2000, you can also create distribution groups that function solely for the purpose of e-mail distribution (the equivalent of Exchange Server 5.5 distribution lists). Distribution groups in Windows 2000 cannot be used as security groups.

Chapter 31, "Exchange Server Overview and Setup," offers more information. For more information on Exchange 2000 Server, refer to *Microsoft Exchange 2000 Server Administrator's Companion* (Microsoft Press, 2000).

Modifying a Server-Side Distribution List

If you are the designated manager of a distribution list on the Exchange Server, you can modify (but not create) the list through Outlook. To make changes, first open the address book and double-click the list. You will see a dialog box similar to the Marketing Properties dialog box shown in Figure 5-19.

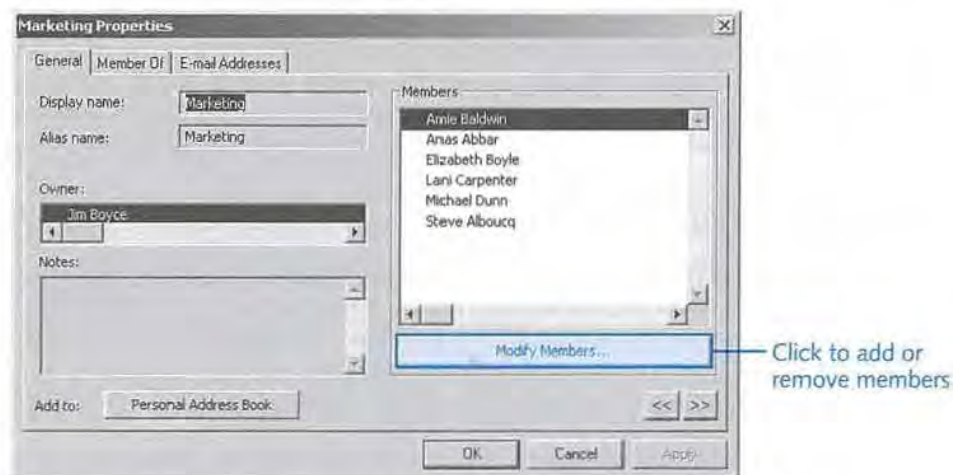


Figure 5-19. Modify a server-side distribution list by using the General tab.

The three tabs of this dialog box allow you to view information about the selected list and its individual members:

- **General.** This tab displays general read-only information about the list, such as display name, alias, and owner.
- **Member Of.** This tab lists the other distribution groups of which the selected list is a member.
- **E-Mail Addresses.** This tab shows the e-mail addresses for the selected distribution list in all its available formats (SMTP and X.400, for example).

To modify the distribution list, click **Modify Members** on the General tab of the dialog box. You can add and remove members in the resulting Distribution List Membership dialog box.

tip Use the arrow buttons in the lower right corner of the dialog box's General tab to display the next and previous items in the address book.

Chapter 5: Managing Address Books and Distribution Lists

note In Exchange 2000 Server, you don't grant ownership of a distribution group as you do over other objects such as files or folders. Rather, the user or group designated as the manager for the distribution group is considered the owner for the purposes of allowing modifications. You specify the manager on the Managed By tab of the group's dialog box in the Active Directory Users And Computers console.

Adding a Distribution List to a Local Address Book

If you prefer working through your local address books rather than the server address lists, you might want to add a server-side distribution list to your local address books. You can easily do so through the address book or the list's dialog box. Open the address book, locate the distribution list, and choose File, Add To Personal Address Book. If you have the list's dialog box open, click Personal Address Book on the Distribution List tab to add the list to the address book. Outlook adds the distribution list to whichever local address book is defined as the default location for personal addresses. (Choose Tools, Options in the address book if you want to redefine the default.)

If you add a server-side distribution list to a PAB, Outlook doesn't prompt for any additional information; it merely adds the list to the PAB. If you add the list to a contacts folder in the OAB, however, Outlook displays a form for the list that you can use to modify the group, assign categories, or mark it as private (see Figure 5-20). Make any changes as needed and click Save And Close.

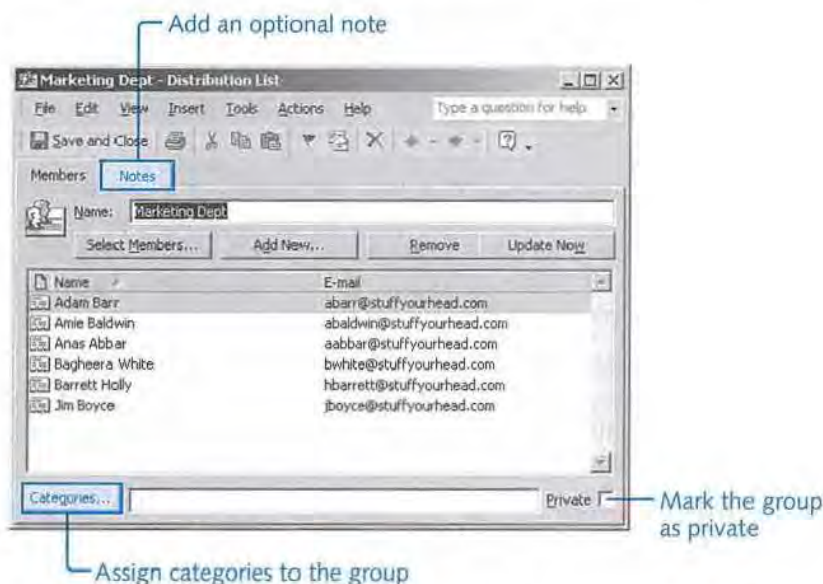


Figure 5-20. You can select various options for lists you store in the OAB.

Automatically Adding Addresses to the Address Book

When you receive a message from a sender whose address you want to save in your local address books, you can add the address manually. Outlook also provides an easier method, however. With the message open, double-click the sender's address on the InfoBar. In the Properties dialog box, click Personal Address Book. Outlook adds the address to whichever local address book is specified as the default location for personal addresses. (Choose Tools, Options in the address book if you want to change this default.) If the dialog box doesn't offer a Personal Address Book button, right-click the address on the InfoBar and choose Add To Contacts instead to add the address to your Contacts folder.

Sharing Address Books

All users can view address lists on the Exchange Server, subject to how permissions are configured on the address lists. In effect, this means that all users can share a common address list through the server.

tip Provide dynamic sharing

You can share individual addresses with others by attaching the contact entries to an e-mail message and sending the message to all users who need the contact information. The recipients can then add the contact data to their own contacts folders. However, providing a dynamic means of sharing is much more efficient and effective, as explained in this section of the chapter.

You also can share your own address books, if needed. For example, you might have created an address book to store addresses for a specific project. Rather than have everyone who needs access to those addresses copy them to their own address books, you can manage the file yourself to keep it up-to-date and allow others to access it. This ensures that everyone will be using the current set of addresses.

How you share an address list depends on where the addresses are located. If they're located on the Exchange Server, you can share the folder to give others access to it. For local address books, the easiest solution is to use Net Folders, which means you can share an Outlook folder across the Internet or an intranet.

You can also make your data available by delegating access to your folders. For detailed information, see "Granting Access to Folders," page 687.

Sharing Contacts Through a Public Folder

If all the users who need to access the shared address book use Exchange Server, the easiest solution is to create a folder on the server and configure it to allow other users to access it. This method offers the benefit of providing access to remote users as well as local users.

note It's possible for remote users to access a shared personal address book file. However, the network must provide remote access, and the computer or share where the address book file is located must be available to remote users.

Use the following method to share a folder containing contact information on the server:

- 1 Open the Public Folders branch and select All Public Folders.
- 2 In Outlook, choose File, Folder, New Folder or right-click All Public Folders and choose New Folder.
- 3 In the Create New Folder dialog box (see Figure 5-21), type a name for the new folder in the Name box.

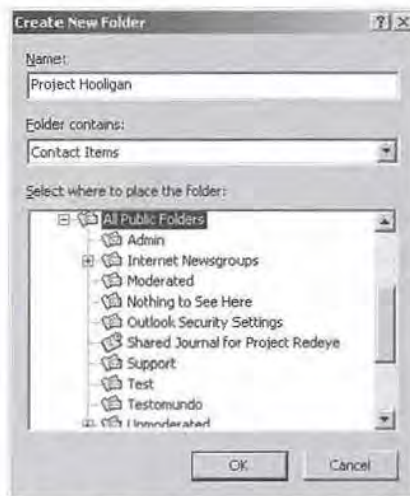


Figure 5-21. Use the Create New Folder dialog box to identify the folders.

- 4 Choose Contact Items from the Folder Contains drop-down list and click OK to create the folder as a root public folder.

note You can create root-level public folders only if you've been given that right by the Exchange Server administrator.

- 5 Right-click the folder you just created and choose Properties, and then click Permissions to display the Permissions tab (see Figure 5-22).



Figure 5-22. Use the Permissions tab to configure access to a public folder.

- 6 Configure the permissions based on the following explanation, and then click OK.

On the Permissions tab, you can specify the types of access that other users will have to the folder. Initially, in the Name box, the Default permission is set to None, making the folder visible but allowing no other access. When Anonymous is set to Contributor, all other users can create and read items in the folder, allowing them to create new contact entries and edit only those items they own (the ones they create).

You can configure permissions to grant individual users specific types of access. To do so, click Add, add the user, and then specify permissions as needed. However, you can use the Default and Anonymous settings to control access by most users and add individual users only if they need permissions that are more or less restrictive than those defined by Default and Anonymous.

Outlook gives you other ways to control permissions as well. For example, you can control the ability to edit and delete items separately from the ability to create items. You configure these permissions depending on what actions you want other users to be able to perform in the folder. You also can configure groups of permissions by using the Permission Level drop-down list or by specifying them individually.

For a detailed discussion of creating and using public folders, see Chapter 34, "Sharing Information with Others."

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Using Internet Mail

Not too many years ago, a person with an Internet e-mail address was the exception rather than the rule. Today, however, it seems as though everyone is using Internet e-mail. So it's a pretty good bet you'll want to use Microsoft Outlook to send and receive messages through at least one Internet e-mail account.

This chapter focuses on setting up both your operating system and Outlook to access Internet mail servers and accounts. For example, because Internet mail requires that your system use the TCP/IP protocol to connect to the Internet, this chapter explains how to add and configure TCP/IP on each of the Microsoft Windows operating systems (excluding Windows 3.x and Microsoft Windows NT 3.x).

In addition to configuring TCP/IP, you must configure a connection to the Internet. If your computer has a direct connection to the Internet—through a cable modem, DSL, or a local area network, for example—you can simply set up Outlook to include your Internet e-mail accounts. If your computer doesn't have a direct connection, you need to create a dial-up Internet connection. This chapter explains how.

The chapter also covers topics related to sending and receiving Internet e-mail. You'll learn how to create Internet e-mail accounts, use multiple accounts, and work with e-mail accounts for services such as Hotmail and CompuServe. You'll also learn how to ensure that your messages are available from different locations, what to do if your e-mail service won't accept outgoing mail from your dial-up location, and how to view full message headers in Internet e-mail.

Setting up TCP/IP isn't difficult, but before you start, you need to understand some background. The following section isn't intended to be a comprehensive guide to TCP/IP, but it does provide you with an overview and the information necessary to get up to speed with TCP/IP.

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Sending and Receiving Messages

Of all the features in Microsoft Outlook, messaging is probably the most frequently used. Even if you use Outlook primarily for contact management or scheduling, chances are good that you also rely heavily on Outlook's e-mail and other messaging capabilities. Because many of Outlook's key features make extensive use of messaging for workgroup collaboration and scheduling, understanding messaging is critical to using the program effectively.

This chapter provides an in-depth look at a wide range of topics related to sending and receiving messages with Outlook. You'll learn the fundamentals—working with message forms, addressing, replying, and forwarding—but you'll also explore other, more advanced topics. For example, this chapter explains how to control when your messages are sent, how to save a copy of sent messages in specific folders, and how to work with attachments.

You'll discover how to add more than just plain text to your messages by working with graphics, hyperlinks, files, attachments, and electronic business cards. As this chapter explains, you can also spruce up your messages by using stationery, which allows you to assign a theme to your messages. Outlook provides a choice of stationery—or you can create your own. You'll also learn how to automatically attach a text signature or an electronic business card to each message you send.

Working with Messages

This section of the chapter offers a primer to bring you up to speed with Outlook's basic messaging capabilities. It focuses on topics that relate to all types of e-mail accounts. The Inbox

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is the place to start learning about Outlook, so fire up the program and open the Inbox folder. The next section explains how to work with message forms.

If you haven't added e-mail accounts to your profile, see the appropriate chapter for details. Chapter 6, "Using Internet Mail," explains how to configure POP3, IMAP, and HTTP accounts; Chapter 32, "Configuring the Exchange Server Client," explains how to configure the Microsoft Exchange Server client.

Opening a Standard Message Form

You can begin a new message in Outlook using any one of these methods:

- Choose File, New, Mail Message.
- With the Inbox open, click New on the message form toolbar.
- Click the down arrow beside the New button on the message form toolbar and choose Mail Message.
- With the Inbox open, press Ctrl+N.

Outlook uses Microsoft Word as the default e-mail editor. When you begin a new message, Word starts and displays the Untitled Message form shown in Figure 7-1. If you've chosen Outlook as your default message editor instead of Word, Outlook displays the message form shown in Figure 7-2.

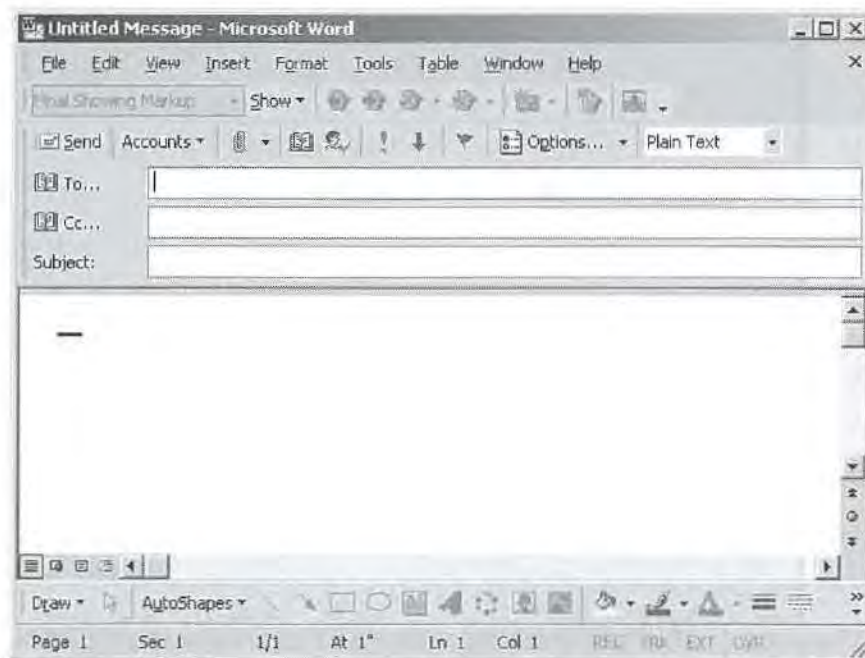


Figure 7-1. You use this standard message form when Word is the default editor.

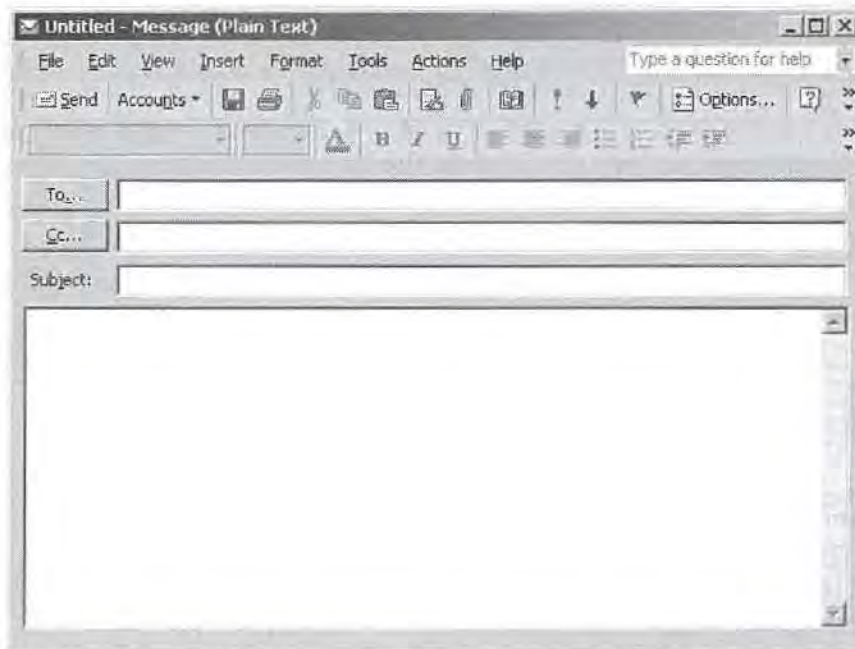


Figure 7-2. You use this standard message form when Outlook is the default editor.

Configuring Your E-Mail Editor and Viewer

You can specify the application you want to use for creating, editing, and viewing messages. To locate these settings, choose **Tools, Options** and click the **Mail Format** tab. By default, Outlook uses Microsoft Word as the e-mail editor for creating and editing messages. If you prefer, however, you can use Outlook as your editor. It takes slightly longer to begin composing a message when Word is the editor, because Outlook must start Word if it is not already running. If you work primarily with plain-text messages and don't use text formatting or graphics in messages, using Outlook as your default e-mail editor will speed up the process. You can also specify whether to use Word or Outlook for reading rich-text messages.

For an explanation of Plain Text and Rich Text formats, see "Formatting Text in Messages," page 202.

On the Mail Format tab of the Options dialog box, you can adjust the following settings:

- **Use Microsoft Word To Edit E-Mail Messages.** Select this option to specify Word as the default e-mail editor. Clear the option to use Outlook as the editor.
- **Use Microsoft Word To Read Rich Text E-Mail Messages.** Select this option to use Word to read rich-text messages. Clear the option to use Outlook instead.

Addressing Messages

Outlook's address books make it easy to address messages. When you want to send a message to someone whose address is stored in one of your local address books or in an address list on the server, you can click in the To box on the message form and type the recipient's name—you don't have to enter the entire address. When you send the message, Outlook checks the name, locates the correct address, and adds it to the message. If multiple addresses match the name you specify, Outlook shows all the matches and prompts you to select the appropriate one. If you want to send a message to someone whose address isn't in any of your address books, you need to type the full address in the To box. Alternatively, you can open a personal address book, add the address so that it will be available in the future, and then select it from there.

For more information about Outlook address books, see Chapter 5, "Managing Address Books and Distribution Lists."

tip

Outlook can check the names and addresses of message recipients before you send the message. Enter the names in the To box and click the Check Names button on the message form toolbar to perform this action.

To open the address book (see Figure 7-3), click an Address Book icon beside an address box on the message form. Outlook opens the Select Names dialog box, which you can use to address the message.

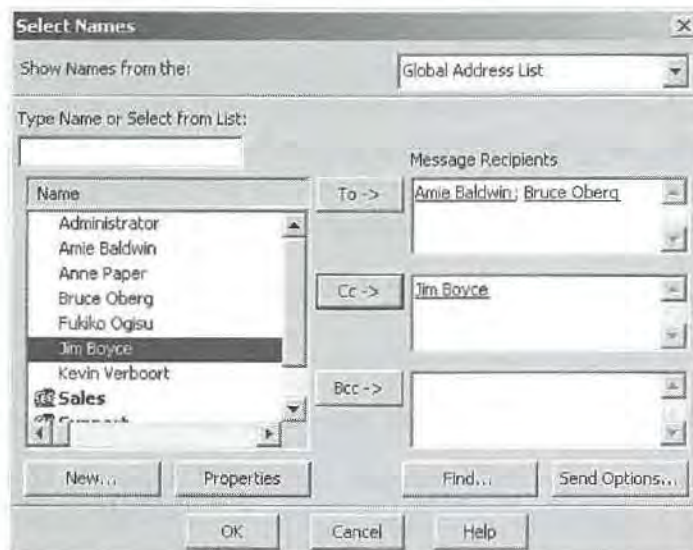


Figure 7-3. In the Select Names dialog box, you can select addresses from the address book.

Follow these steps to select addresses in this dialog box and add them to your message:

- 1 In the Show Names From The drop-down list, select the address list you want to view.
- 2 Select a name from the list, and click To, Cc, or Bcc to add the selected address to the specified address box.
- 3 Continue this process to add more recipients if necessary. Click OK when you're satisfied with the list.

tip You can include multiple recipients in each address box on the message form. If you're typing the addresses yourself, separate them with a semicolon.

Including Carbon Copies and Blind Carbon Copies

You can direct a single message to multiple recipients either by including multiple addresses in the To box on the message form or by using the Cc (Carbon Copy) and Bcc (Blind Carbon Copy) boxes. The Cc box appears by default on message forms, but the Bcc box does not. To display the Bcc box, click the down arrow beside Options on the message form toolbar and choose Bcc. You use the Cc and Bcc boxes the same way you use the To box: type a name or address in the box, or click the Address Book icon beside the box to open the address book.

tip Hide addresses when necessary

The names contained in the To and Cc boxes of your message are visible to all recipients of the message. If you're using a distribution list, Outlook converts the names on the list to individual addresses, exposing those addresses to the recipients. If you want to hide the names of one or more recipients or don't want distribution lists exposed, place those names in the Bcc box.

Using Word to Compose Messages

Using Word as the default e-mail editor means you can take advantage of all Word's formatting, graphics, and other capabilities to create rich-text, multimedia messages. For example, you can use character and paragraph formatting, bulleted lists, automatic numbered lists, animated text, graphics, and other Word features to create dynamic messages (see Figure 7-4 on the next page). If Outlook is set up to use Word as your default editor, simply open a new message form and begin creating the message, using any Word features you need.

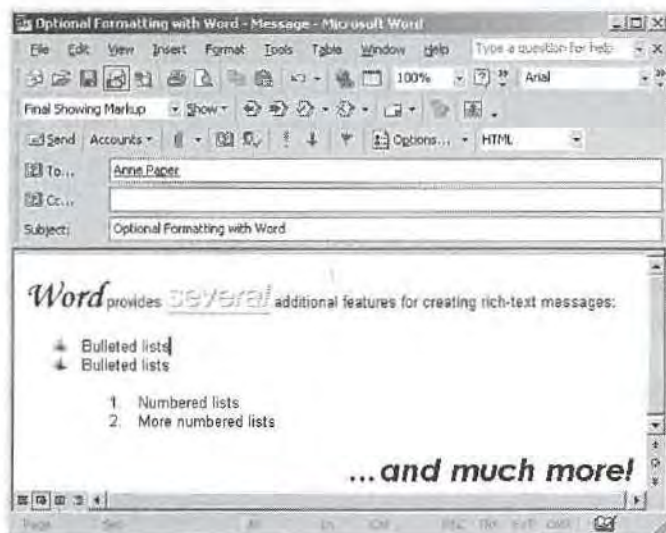


Figure 7-4. With Word as your editor, you have additional options for creating rich-text messages.

For information on specifying Word as the default e-mail editor, see the sidebar "Configuring Your E-Mail Editor and Viewer," page 175.

You can also create messages when you start Word outside Outlook:

- 1 With Word open, create the message in the body of the document.
- 2 Choose File, Send To, Mail Recipient. Word displays a message form with To, Cc, and Subject boxes.
- 3 Address the message and click Send when the message is complete.

Troubleshooting

The e-mail headers won't go away in Word.

When you're working in Word and you choose File, Send To, Mail Recipient, Word displays an e-mail toolbar with From, To, Cc, Bcc, and Subject headers. This lets you address a message and send the current document as the body of the message. If you decide not to send the message after all and want to continue editing the document, you could make the headers go away by shutting down Word, restarting, and reopening the document. But there is a much easier way: just choose File, Send To, Mail Recipient again. This command acts like a toggle to turn the e-mail toolbar on and off.

Specifying Message Priority and Sensitivity

By default, new messages that you create in either Outlook or Word have their priority set to Normal. You might want to change the priority to High for important or time-sensitive messages or to Low for nonwork mail or other messages that have relatively less importance. Outlook displays an icon in the Importance column of the recipient's Inbox to indicate High or Low priority. (For messages with Normal priority, no icon is displayed.)

The easiest way to set message priority is by using the toolbar in the message form. Click the High Priority button (which has an exclamation mark icon) to specify High priority. Click the Low Priority button (which has a down arrow icon) to specify Low priority. To set the priority back to Normal, click the selected priority again to remove the highlight around the button (see Figure 7-5). You can also click Options on the toolbar and set the message priority in the Message Options dialog box. In the Message Settings section of the dialog box, choose the priority level from the Importance drop-down list.

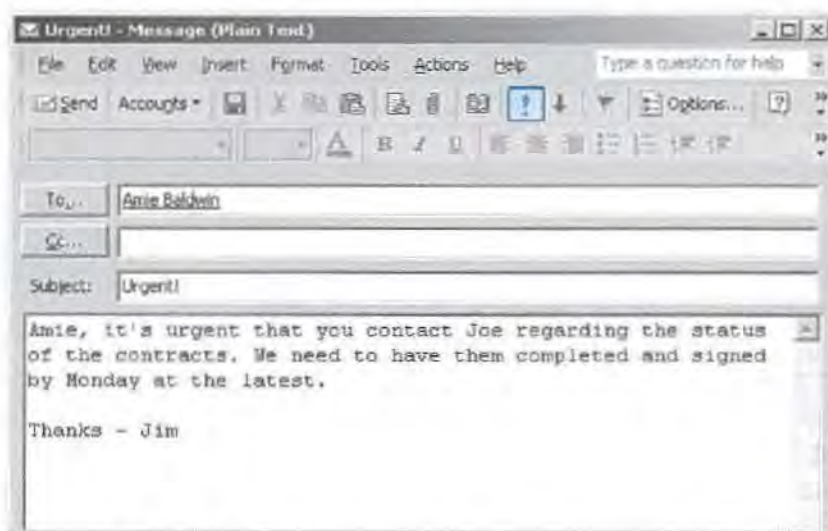


Figure 7-5. Outlook highlights the appropriate priority button to provide a visual indicator of the message's priority.

You also can specify a message's sensitivity, choosing a Normal (the default), Personal, Private, or Confidential sensitivity level. Setting sensitivity adds a tag to the message that displays the sensitivity level you've selected. This helps the recipient see at a glance how you want the message to be treated. To set sensitivity, click Options on the message form toolbar and select the sensitivity level from the Sensitivity drop-down list.

Saving a Message to Send Later

Although you can create some messages in a matter of seconds, others can take considerably longer—particularly if you're using formatting or special features or if you're composing a lengthy message. If you're interrupted while composing a message, or if

Part 2: Messaging

you simply want to leave the message to finish later, you can save the message in your Drafts folder. Later, when you have time, you can reopen the message, complete it, and send it. Choose File, Save in the message form to have Outlook save the message to the Drafts folder (see Figure 7-6). When you're ready to work on the message again, open the Drafts folder and double-click the message to open it.

To learn how to configure Outlook to automatically save a copy of messages you send, see "Saving Messages Automatically," page 198.

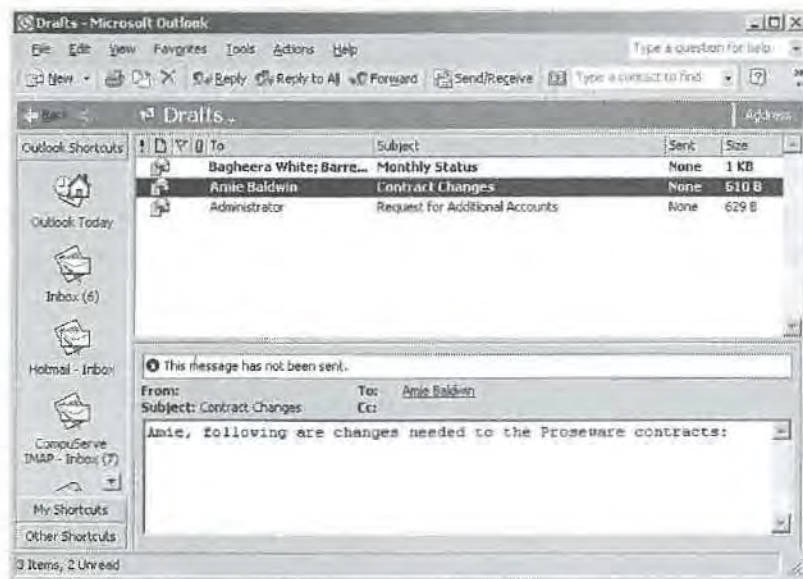


Figure 7-6. Messages in progress reside in the Drafts folder.

tip You also can choose File, Save As to save a message as a Word document (or in another document format) outside your Outlook folders.

Setting Sending Options

In the Advanced E-Mail Options dialog box (see Figure 7-7), you can configure various options that affect how Outlook sends e-mail messages. To open this dialog box, choose Tools, Options and click E-Mail Options on the Preferences tab. In the E-Mail Options dialog box, click Advanced E-Mail Options.

For details on specifying which account is used to send a message, see "Sending Messages Using a Specific Account," page 168.

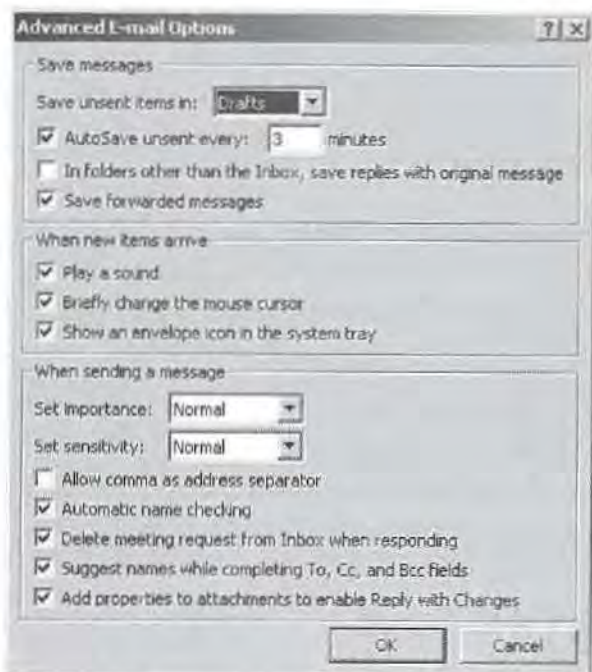


Figure 7-7. You can choose options for sending messages in the Advanced E-Mail Options dialog box.

In the Advanced E-Mail Options dialog box, you can modify the following settings:

- **Set Importance.** This option sets the default importance, or priority, level for all new messages. When you compose a message, you can override this setting by clicking the High Priority button or the Low Priority button on the toolbar in the message form or by clicking Options on the toolbar and setting the priority in the Message Options dialog box. The default setting is Normal.
- **Set Sensitivity.** This option sets the default sensitivity level for all new messages. When you compose a message, you can override this setting by clicking Options on the toolbar and setting the sensitivity level in the Message Options dialog box.
- **Allow Comma As Address Separator.** If this option is selected, you can use commas as well as semicolons in the To, Cc, and Bcc boxes of a message form to separate addresses.
- **Automatic Name Checking.** Select this option to have Outlook attempt to match names to e-mail addresses. Verified addresses are underlined, and those for which Outlook finds multiple matches are underscored by a red wavy line. When multiple matches exist and you've used a particular address before, Outlook underscores the name with a green dashed line to indicate that other choices are available.

- **Delete Meeting Request From Inbox When Responding.** Select this option to have Outlook delete a meeting request from your Inbox when you respond to the request. If you accept the meeting, Outlook enters the meeting in your calendar. Clear this check box if you want to retain the meeting request in your Inbox.
- **Suggest Names While Completing To, Cc, And Bcc Fields.** When this option is selected, Outlook completes addresses as you type them in the To, Cc, and Bcc boxes of the message form. Clear this check box to turn off this automatic completion.
- **Add Properties To Attachments To Enable Reply With Changes.** When this option is selected, Outlook adds properties to the attached documents of outgoing messages that allow the recipient to reply to the message with changes.

Controlling When Messages Are Sent

To specify when Outlook should send messages, choose Tools, Options and click Mail Setup to locate the following option:

- **Send Immediately When Connected.** With this option selected, Outlook sends messages as soon as you click Send, provided Outlook is online. If Outlook is offline, the messages go into the Outbox until you process them with a send/receive operation (which is also what happens if you do not select this option).

Requesting Delivery and Read Receipts

Regardless of which e-mail editor you use, you can request a *delivery receipt* or a *read receipt* for any message. Both types of receipts are messages that are delivered back to you after you send your message. A delivery receipt indicates the date and time your message was delivered to the recipient's mail server. A read receipt indicates the date and time the recipient opened the message.

Specifying that you want a delivery receipt or a read receipt for a message doesn't guarantee that you're going to get one. The recipient's mail server or mail client might not support delivery and read receipts. The recipient might have configured his or her e-mail client to automatically reject requests for receipts, or the recipient might answer No when prompted to send a receipt. If you receive a receipt, it's a good indication that the message was delivered or read. If you don't receive a receipt, however, you can't assume that the message wasn't delivered or read. A message receipt serves only as a positive notification, not a negative one.

To request receipts for a message you're composing, click the Options button on the message form toolbar to display the Message Options dialog box (see Figure 7-8). You'll find the delivery and read receipt options in the Voting And Tracking Options group.

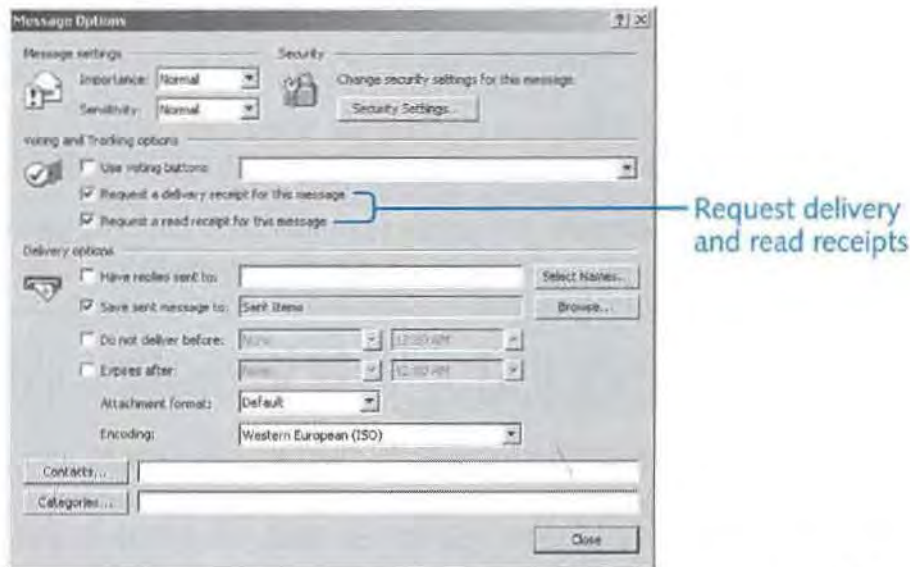


Figure 7-8. Use the Message Options dialog box to request a delivery receipt, a read receipt, or both.

Using Message Tracking and Receipts Options

You can set options to determine how Outlook handles delivery and read receipts by default. Choose Tools, Options and click E-Mail Options on the Preferences tab. In the E-Mail Options dialog box, click Tracking Options to display the Tracking Options dialog box, shown in Figure 7-9, where you'll find the options discussed in this section.

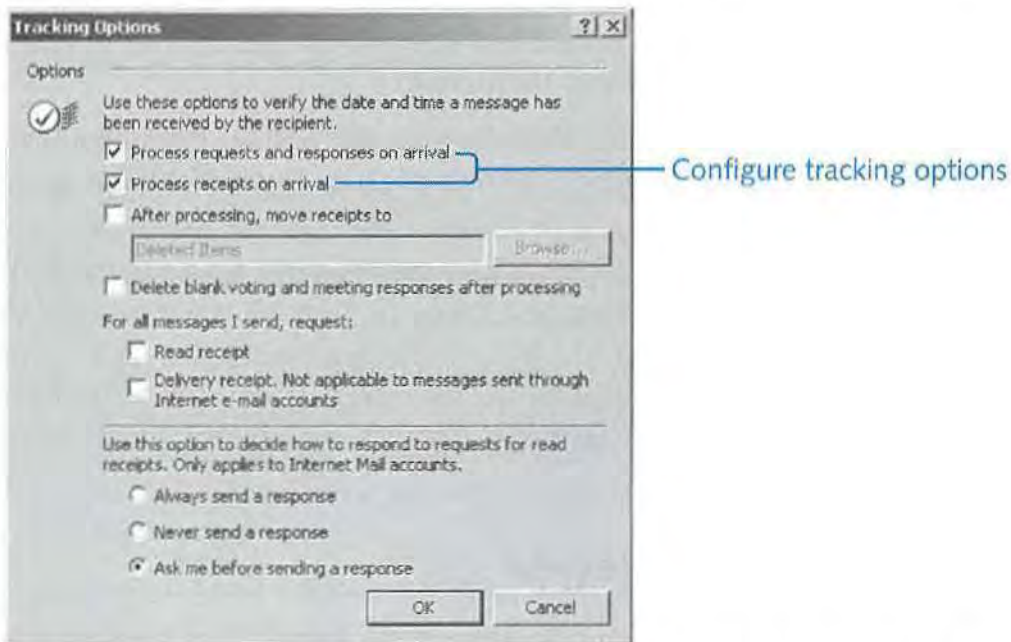


Figure 7-9. Process receipts and responses in the Tracking Options dialog box.

The following options control how Outlook requests read receipts and how the receipts are processed after they are received:

- **Process Requests And Responses On Arrival.** Select this option to have Outlook process all message receipt requests and responses when they arrive.
- **Process Receipts On Arrival.** Select this option to have Outlook generate received/read receipts when messages come in requesting them. Clear this check box to have Outlook prompt you for each receipt.
- **After Processing, Move Receipts To.** Select this option to have Outlook move receipts from the Inbox to the specified folder.
- **For All Messages I Send, Request Read Receipt.** Select this option to have Outlook request a read receipt for each message you send. When you compose a message, you can override this setting; to do so, click the Options button on the message form toolbar.
- **For All Messages I Send, Request Delivery Receipt.** Select this option to have Outlook request a delivery receipt for each message you send. (Note that this option is not available for messages that are sent through Internet e-mail accounts.)

These three options in the Tracking Options dialog box let you control how Outlook responds to requests from others for read receipts on messages you receive, and apply to Internet Mail accounts only:

- **Always Send A Response.** When this option is selected, Outlook always sends a read receipt to any senders who request one. Outlook generates the read receipt when you open the message.
- **Never Send A Response.** Select this option to prevent Outlook from sending read receipts to senders who request them. Outlook will not prompt you regarding receipts.
- **Ask Me Before Sending A Response.** Selecting this option lets you control, on a message-by-message basis, whether Outlook sends read receipts. When you open a message for which the sender has requested a read receipt, Outlook prompts you to authorize the receipt. If you click Yes, Outlook generates and sends the receipt. If you click No, Outlook doesn't create or send a receipt.

Sending a Message for Review

If you compose a message from Word (that is, you started Word outside Outlook), you have the ability to send the message as a document for review. You might use this feature if you're collaborating on a document with others or incorporating their comments into the final draft. Recipients can review the document and add comments, which they send

back to you. They also can incorporate the changes directly in the document, which lets them take advantage of Word's revision marks feature. To send a document for review, open the document in Word and choose File, Send To, Mail Recipient (For Review).

note For more detailed information on sending documents for review, see *Microsoft Word Version 2002 Inside Out*, by Mary Millhollon and Katherine Murray (Microsoft Press, 2001).

Sending a Message as an Attachment

If you compose a message using Word as the e-mail editor, you can send the message as an attachment rather than as the body of the message. For example, you might be working on a long document that you would prefer to send as an intact DOC file. If that's the case, with the document open in Word, choose File, Send To, Mail Recipient (As Attachment).

Sending to a Routing Recipient

Another option that's available when you use Word as your e-mail editor is routing a document to a group of users, either one at a time or all at the same time. For example, you might need to send a document to three recipients for each person's approval. Or you might want to route a document to all the members of a group in a specific sequence, giving each member a chance to review both the document and the comments of earlier reviewers. Routing slips allow you to accomplish either of these tasks.

Follow these steps to use a routing slip:

- 1 In Word, compose the message and choose File, Send To, Routing Recipient.
- 2 Outlook displays a message indicating that another program (Word) is attempting to access addresses you have stored in Outlook. When you click Yes to allow Word to read your addresses, the Routing Slip dialog box is displayed (see Figure 7-10 on the next page).
- 3 Click Address and add the addresses of all recipients to whom you want to send the message. If you want the message to be routed to the recipients in sequence (the One After Another option at the bottom of the dialog box), select the addresses in the order in which you want the recipients to receive the message.

tip If you prefer, you can add the addresses to the Routing Slip dialog box in any order. Then you can use the Move arrow buttons to change the routing order, as indicated in Figure 7-10.

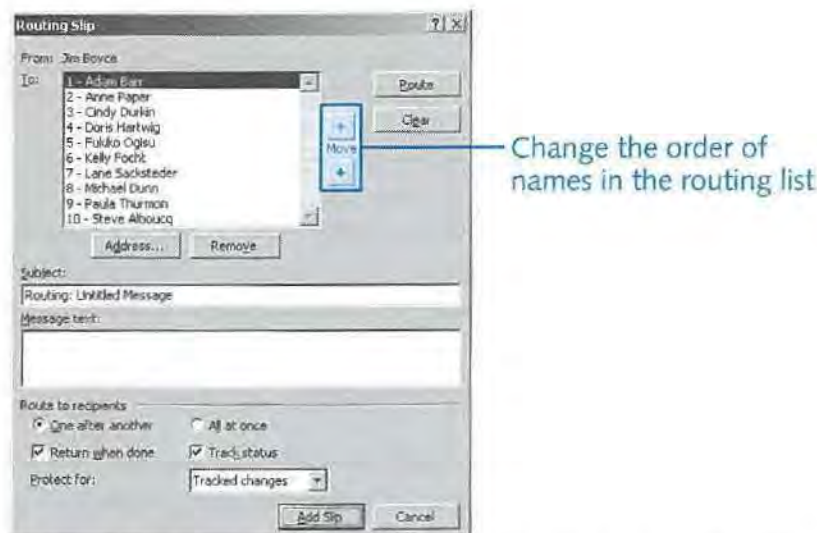


Figure 7-10. Use the Routing Slip dialog box to route a message to multiple recipients.

- 4 Specify the subject and the message text for the routing slip, and then select from the following options:
 - **One After Another.** Outlook sends the message only to the first recipient on the list. That recipient then uses the routing slip to route the message to the next person on the list.
 - **All At Once.** Outlook sends the message to all recipients on the routing list at the same time.
 - **Return When Done.** Outlook automatically returns the routed document to you when the last recipient closes it.
 - **Track Status.** Outlook delivers an e-mail message to you each time a recipient sends the document to another person on the routing list.
 - **Protect For.** In the drop-down list, select Comments to allow recipients to insert comments but not to modify the document. Select Tracked Changes to turn on revision marks and allow recipients to insert changes using revision marks. Select Forms if you're routing a form that you want recipients to fill out, but you don't want them to modify the form itself. Select None if you don't want to track any changes.
- 5 Click Add Slip to add the routing slip, and then click Send to send the document.

note To learn more about sending documents using a routing slip, see *Microsoft Word Version 2002 Inside Out*, by Mary Millhollon and Katherine Murray (Microsoft Press, 2001).

Replying to Messages

When you reply to a message, Outlook sends your reply to the person who sent you the message. Replying to a message is simple: select the message in the Inbox, and then click the Reply button on the Standard toolbar; choose Actions, Reply; or press Ctrl+R. Outlook opens a message form and, depending on how you have configured Outlook for replies, can also include the original message content in various formats.

If the message to which you're replying was originally sent to multiple recipients and you want to send your reply to all of them, click Reply All; choose Actions, Reply To All; or press Ctrl+Shift+R.

For more information about message replies, see "Using Other Reply and Forwarding Options," page 188.

tip Hide the recipients list

When you use Reply All, Outlook places all the addresses in the To box. If you don't want the recipients list to be visible, use the Bcc box to send blind carbon copies. To do this, click Reply All, highlight the addresses in the To box, and cut them. Then click in the Bcc box and paste the addresses there.

Forwarding Messages

In addition to replying to a message, you can forward the message to one or more recipients. To forward a message, select the message header in the message folder (Inbox or other), and then click Forward on the message form toolbar; choose Actions, Forward; or press Ctrl+F. Outlook opens a new message form and either incorporates the original message in the body of the current one or attaches it to the new message.

If you forward a single message, Outlook by default forwards the original message in the body of your new message, and you can add your own comments. If you prefer, however, you can configure Outlook to forward messages as attachments rather than including them in the body of your messages.

For information about options for forwarding, see "Using Other Reply and Forwarding Options," page 188.

note If you select multiple messages and click Forward, Outlook sends the messages as attachments rather than including them in the body of your message.

Using Other Reply and Forwarding Options

You can change how Outlook handles and formats message replies and forwarded messages. These options reside in the E-Mail Options dialog box, shown in Figure 7-11.



Figure 7-11. You can set options for message replies and forwarded messages in the E-Mail Options dialog box.

To open this dialog box, choose Tools, Options and click E-Mail Options on the Preferences tab. You can then view or set the following options:

- **Close Original Message On Reply Or Forward.** Select this option to have Outlook close the message form when you click Reply or Forward. Clear this option to have Outlook leave the message form open. If you frequently forward the same message with different comments to different recipients, it's useful to have Outlook leave the message open so that you don't have to open it again to perform the next forward.
- **When Replying To A Message.** Use this drop-down list to specify how Outlook handles the original message text when you reply to a message. You can choose to have Outlook generate a clean reply without the current message text, include the text without changes, or include but indent the text, for example. Note that you can either include the original message text in the body of your reply or add it to the message as an attachment.
- **When Forwarding A Message.** Use this drop-down list to specify how Outlook handles the original message text when you forward a message. You can, for example, include the message in the body of the forwarded message or add it as an attachment.

- **Prefix Each Line With.** If you select Prefix Each Line Of The Original Message in the When Replying To A Message option or the When Forwarding A Message option, you can use this box to specify the character Outlook uses to prefix each line of the original message in the body of the reply or the forwarded message. The default is an angle bracket (>) and a space, but you can use one or more characters of your choice.
- **Mark My Comments With.** Select this option and enter a name or other text in the associated box. Outlook will add the specified text to mark your typed comments in the body of a message that you are replying to or forwarding. This option has no effect if you're using Word as your e-mail editor, because Word uses revision marks for document annotation.

For more details on replying to and forwarding messages, see "Replying to Messages" and "Forwarding Messages," page 187.

Troubleshooting

You can't forward a single message as an attachment.

In Outlook 2002, you can send documents from other Microsoft Office applications as attachments, and you can forward multiple messages in Outlook as attachments. However, sending a single message as an attachment rather than including it in the body of the message in Outlook requires either that you reconfigure Outlook's default behavior before forwarding the message or that you use a workaround.

To change Outlook's default behavior so that it sends a single message as an attachment when you forward it, choose Tools, Options, E-Mail Options. In the When Forwarding A Message drop-down list, select Attach Original Message and click OK. This setting now applies to all messages you forward, not just to the current one.

If you want to override Outlook's default behavior for the current message only, use one of these two workarounds. One method is to select two messages to forward and then, in the message form, delete the attached message that you don't want to include. A second method is to compose a new message and choose Insert, Item to insert the message (or any other Outlook item).

Controlling Synchronization and Send/Receive Times

Outlook uses *send and receive groups* (or *send/receive groups*) to control when messages are sent and received for specific e-mail accounts. You can also use send/receive groups to define the types of items that Outlook synchronizes. *Synchronization* is the process in which Outlook synchronizes the local copy of your folders with your message store on the Exchange Server. For example, assume that while you've been working offline you have created several new e-mail messages and scheduled a few events. You connect to the Exchange Server and perform a synchronization. Outlook uploads to your Exchange Server the changes you made locally and also downloads changes from the server to your local store, such as downloading messages that have been delivered to your Inbox on the server.

Send/receive groups allow you to be flexible in controlling which functions Outlook performs for synchronization. For example, you can set up a send/receive group for your Exchange Server account that synchronizes only your Inbox and not your other folders, for those times when you simply want a quick check of your mail.

Send/receive groups also are handy for helping you manage different types of accounts. For example, if you integrate your personal and work e-mail into a single profile, you can use send/receive groups to control when each type of mail is processed. You might create one send/receive group for your personal accounts and another for your work accounts. You can also use send/receive groups to limit network traffic to certain times of the day. For example, if your organization limits Internet connectivity to specific times, you could use send/receive groups to schedule your Internet accounts to synchronize during the allowed times.

Think of send/receive groups as a way to collect various accounts into groups and assign to each group specific send/receive and synchronization behavior. You can create multiple send/receive groups, and you can include the same account in multiple groups if needed.

Setting Up Send/Receive Groups

To set up or modify send/receive groups in Outlook, choose Tools, Send/Receive Settings, Define Send/Receive Groups. Outlook displays the Send/Receive Groups dialog box, shown in Figure 7-12. By default, Outlook sets up one group named All Accounts and configures it to send and receive when online and offline. You can modify or remove that group, add others, and configure other send/receive behavior in the Send/Receive Groups dialog box.

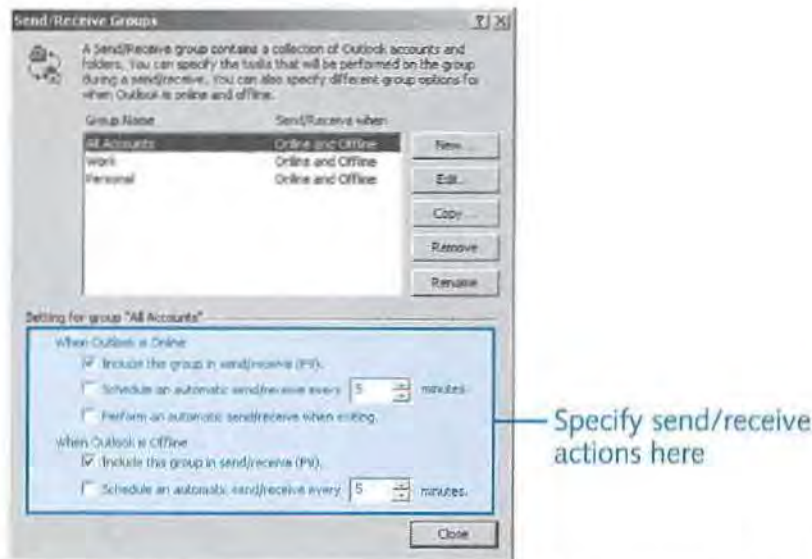


Figure 7-12. You can specify send/receive actions in the Send/Receive Groups dialog box.

When you select a group from the Group Name list, Outlook displays the associated settings in the Setting For Group area of the dialog box:

- **Include This Group In Send/Receive.** Select this option to have Outlook process accounts in the selected group when you click Send/Receive on the message form toolbar or press F9. Outlook provides this option for both online and offline behavior.
- **Schedule An Automatic Send/Receive Every *n* Minutes.** Select this option to have Outlook check the accounts in the selected group every *n* minutes. The default is 5 minutes. Outlook provides this option for both online and offline behavior.
- **Perform An Automatic Send/Receive When Exiting.** Select this option to have Outlook process the accounts in the selected group when you exit Outlook from an online session.

Creating New Groups

Although you could modify the All Accounts group to process only selected accounts, it's better to create other groups as needed and leave All Accounts "as is" for those times when you do want to process all your e-mail accounts together.

Follow these steps to create a new group:

- 1 In Outlook, choose Tools, Send/Receive Settings, Define Send/Receive Groups.
- 2 Click New, type the name for the group as you want it to appear on the Send/Receive submenu, and click OK. Outlook displays the Send/Receive Settings dialog box, shown in Figure 7-13 on the next page.



Figure 7-13. You can configure account processing in the Send/Receive Settings dialog box.

- 3** In the Accounts bar on the left, click the account you want to configure. By default, all accounts in the group are excluded from synchronization, indicated by the red X on the account icon.
- 4** Select the Include Account In This Send/Receive Group check box to activate the remaining options in the dialog box and to have the account included when you process messages for the selected group.
- 5** In the Check Folders To Include In Send/Receive list, click the box beside each folder that you want Outlook to synchronize when processing this group.
- 6** Select other settings, using the following list as a guide:
 - **Send Mail Items.** Select this option to have Outlook send outgoing mail for this account when a send/receive action occurs for the group.
 - **Receive Mail Items.** Select this option to have Outlook retrieve incoming mail for this account when a send/receive action occurs for the group.
 - **Make Folder Home Pages Available Offline.** This option has Outlook cache folder home pages offline so that they are available to you any time.
 - **Synchronize Forms.** Select this option to have Outlook synchronize changes to forms that have been made locally as well as changes that have been made on the server.

- **Download Offline Address Book.** When this option is selected, Outlook updates the offline address book when a send/receive action occurs for the group.
 - **Get Folder Unread Count.** For IMAP accounts only, you can select this option to have Outlook get the number of unread messages from the server.
- 7** If you need to apply filters or message size limits, do so. Otherwise, click OK and then click Close to close the Send/Receive Groups dialog box.

For information on how to apply filters or message size limits, see "Filtering Folders During Synchronization," below or "Limiting Message Size," page 195.

Modifying Existing Groups

You can modify existing send/receive groups in much the same way you create new ones. Choose Tools, Send/Receive Settings, Define Send/Receive Groups. Select the group you want to modify and click Edit. The settings you can modify are the same as those discussed in the preceding section.

Filtering Folders During Synchronization

Although you'll probably want to synchronize all items for each folder when you send and receive, you might occasionally want to filter a folder to process only items that meet certain criteria. For example, perhaps you want to download only incoming messages that have no attachments, because a large attachment in your Inbox is choking your Internet connection and preventing you from retrieving an important message.

Outlook provides a means of filtering the send/receive process for each folder. When you set a filter for a folder, the filter applies not just to the selected send/receive group but to that folder in all send/receive groups to which it belongs. In other words, the filter follows the folder, not the selected group.

Follow these steps to filter a folder:

- 1** Choose Tools, Send/Receive Settings, Define Send/Receive Groups.
- 2** Select a group to modify and click Edit.
- 3** From the Accounts bar, select the account containing the folder you want to filter.
- 4** In the Check Folders To Include In Send/Receive list, select the folder to filter.
- 5** Click Filter Selected Folder to open the Filter dialog box, shown in Figure 7-14 on the next page.

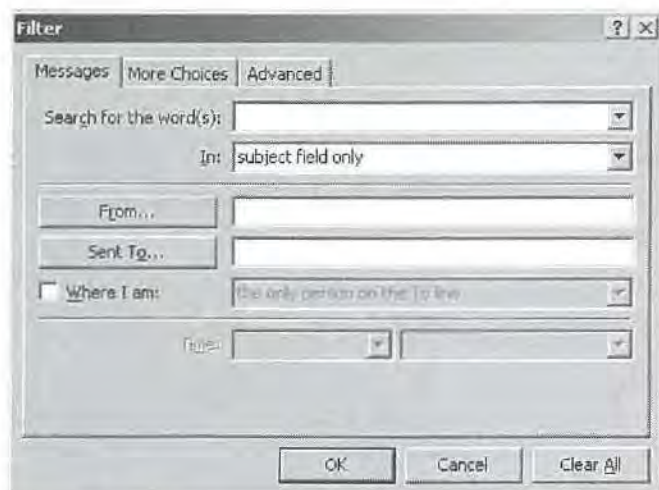


Figure 7-14. You can filter folder actions using the Filter dialog box.

- 6** Set up the filter criteria by entering the relevant information and choosing options on the various tabs of the Filter dialog box. Click OK.
- 7** Make other changes to accounts and folders as needed, and click OK to close the Send/Receive Settings dialog box. Then close the Send/Receive Groups dialog box.

As you browse through the options in the Filter dialog box, you'll find that Outlook gives you considerable flexibility for defining the filter criteria.

Clearing a Filtered Selection

Filter criteria that you have specified will continue to be applied until you clear the filter.

Follow these steps to clear the filter and allow unfiltered synchronization:

- 1** Choose Tools, Send/Receive Settings, Define Send/Receive Groups.
- 2** Select a group to modify and click Edit.
- 3** From the Accounts bar, select the account containing the folder you want to filter.
- 4** In the Check Folders To Include In Send/Receive list, select the folder to filter.
- 5** Click Filter Selected Folder to open the Filter dialog box.
- 6** Click Clear All, and then click OK.

Limiting Message Size

You can also use the Send/Receive Settings dialog box to specify a limit on message size for messages downloaded from the Inbox of the selected Exchange Server account. This provides an easy way to control large messages that arrive in your Exchange Server account. Rather than downloading messages that are larger than the specified limit, Outlook places them in a folder on the server named Large Messages (a subfolder of the Inbox) and notifies you of that action. You can then go online and open the Large Messages folder to view the messages or include the Large Messages folder in your next synchronization.

note Specifying a message size limit in the Send/Receive Settings dialog box doesn't affect the size of messages that you can receive on the server. It simply directs Outlook to copy large messages to a different folder on the server rather than downloading them.

Follow these steps to specify a message size limit for an Exchange Server account:

- 1 Choose Tools, Send/Receive Settings, Define Send/Receive Groups.
- 2 Select a group to modify and click Edit.
- 3 From the Accounts bar, select the Exchange Server account containing the folder for which you want to set a message size limit.
- 4 Click Limit Message Size to display the Download Options dialog box, shown in Figure 7-15 on the next page.
- 5 Specify the criteria you want to use to limit message download and click OK. Notice that you can also specify exceptions to the limits—for example, you can have Outlook download any High priority message, no matter how large.

When you create a message size limit by using this procedure, Outlook creates a message rule named Large Message Rule. If you need to configure more advanced options or exercise a finer degree of control over the size limit criteria, choose Tools, Rules Wizard. The Rules Wizard allows you to modify the Large Message Rule to suit your requirements.

For more details about working with message rules, see "Processing Messages Automatically," page 231.

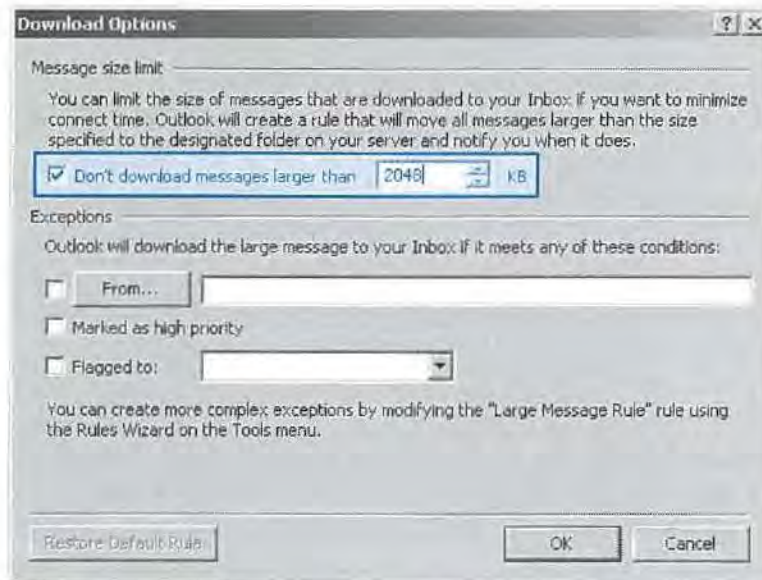


Figure 7-15. Use the Download Options dialog box to control downloading of large messages.

You can use a similar mechanism to control downloading of large messages from POP3 accounts. In this case, you can choose to download only message headers for messages larger than a specified size.

Follow these steps to configure POP3 message size filtering:

- 1** Choose Tools, Send/Receive Settings, Define Send/Receive Groups.
- 2** Select a group to modify and click Edit.
- 3** From the Accounts bar, select the POP3 account for which you want to set a message size limit.
- 4** Select Download Only Item Descriptions For Items Larger Than *nn* KB, specify the size limit, and click OK.

To retrieve a message with a large attachment from a POP3 server, mark the message to be downloaded.

For details on using remote mail with POP3 accounts, see "Working with Message Headers," page 368.

Scheduling Send/Receive Synchronization

You can schedule synchronization for each send/receive group separately, giving you quite a bit of control over when Outlook processes your Inbox, Outbox, and other folders for synchronization. You can configure Outlook to process each send/receive group

on a periodic basis as well as to process specific groups when you exit Outlook. For example, you might schedule the All Accounts group to synchronize only when you exit Outlook, even though you've scheduled a handful of other groups to process messages more frequently during the day. Because you can create as many groups as needed and can place the same account in multiple groups, you have a good deal of flexibility in determining when each account is processed.

Configuring Send/Receive Schedules

Follow these steps to configure synchronization for each send/receive group:

- 1 Choose Tools, Send/Receive Settings, Define Send/Receive Groups.
- 2 In the Send/Receive Groups dialog box, select the group whose schedule you want to modify.
- 3 In the Setting For Group area, select Schedule An Automatic Send/Receive Every *n* Minutes, and then specify the number of minutes that should elapse between send/receive events for the selected group. Set this option for both online and offline behavior.
- 4 If you want the group to be processed when you exit Outlook, select Perform An Automatic Send/Receive When Exiting.

You can use a combination of scheduled and manually initiated send/receive events to process messages and accounts. For example, you can specify in the Send/Receive Group dialog box that a given group (such as All Accounts) must be included when you click Send/Receive or press F9 and then configure other accounts to process as scheduled. Thus some accounts might process only when you manually initiate the send/receive event, and others might process only by automatic execution. In addition, you can provide an overlap so that a specific account processes manually as well as by schedule—simply include the account in multiple groups with the appropriate settings for each group.

Disabling Scheduled Send/Receive Processing

On occasion, you might want to disable scheduled send/receive events altogether. For example, assume that you're working offline and don't have a connection through which you can check your accounts. In that situation, you can turn off scheduled send/receive processing until a connection can be reestablished.

To disable scheduled send/receive processing, choose Tools, Send/Receive Settings, Disable Scheduled Send/Receive. Select this command again to enable the scheduled processing.

Managing Messages and Attachments

Using Outlook's e-mail features effectively requires more than understanding how to send and receive messages. This section of the chapter helps you get your messages and attachments under control.

Saving Messages Automatically

You can configure Outlook to save messages automatically in several ways—for example, saving the current message periodically or saving a copy of forwarded messages. You'll find most of the following options in the E-Mail Options dialog box (shown earlier in Figure 7-11) and in the Advanced E-Mail Options dialog box (shown earlier in Figure 7-7).

- **Automatically Save Unsent Messages (in the E-Mail Options dialog box).** Use this option to have Outlook save unsent messages in the Drafts folder. Outlook by default saves unsent messages to the Drafts folder every 3 minutes. Clear this option if you don't want unsent messages saved in this folder.
- **Save Unsent Items In (in the Advanced E-Mail Options dialog box).** Specify the folder in which you want Outlook to save unsent items. The default location is the Drafts folder.
- **AutoSave Unsent Every *n* Minutes (in the Advanced E-Mail Options dialog box).** Specify the frequency at which Outlook automatically saves unsent items to the folder specified by the Save Unsent Items In option.
- **In Folders Other Than The Inbox, Save Replies With Original Message (in the Advanced E-Mail Options dialog box).** With this option selected, Outlook saves a copy of sent items to the Sent Items folder if the message originates from the Inbox (new message, reply, or forward). If the message originates from a folder other than the Inbox—such as a reply to a message stored in a different folder—Outlook saves the reply in the same folder as the original. If this option is cleared, Outlook saves all sent items in the Sent Items folder.

You can also use rules to control where Outlook places messages. For more information on creating and using rules, see Chapter 8, "Filtering, Organizing, and Using Automatic Responses."

- **Save Forwarded Messages (in the Advanced E-Mail Options dialog box).** Select this option to save a copy of all messages that you forward. Messages are saved in either the Sent Items folder or the originating folder, depending on how you set the previous option.

Retaining a Copy of Sent Messages

Keeping track of the messages you send can often be critical, particularly in a work setting. Fortunately, with Outlook, you can automatically retain a copy of each message you send, providing a record of when you sent the message and to whom you sent it.

By default, Outlook stores a copy of each sent message in the Sent Items folder. You can open this folder and sort the items to locate messages based on any message criteria. You can view, forward, move, and otherwise manage the contents of Sent Items just as you can with other folders.

If you allow Outlook to save a copy of messages in the Sent Items folder, over time the sheer volume of messages can overwhelm your system. So you should implement a means—whether manual or automatic—to archive or clear out the contents of the Sent Items folder. With the manual method, all you need to do is move or delete messages from the folder as your needs dictate. If you want to automate the archival process, you can do so; for details on how to automatically archive messages from any folder, see “Configuring the Automatic Archiving of Items,” page 716.

Follow these steps to specify whether Outlook retains a copy of sent messages in the Sent Items folder:

- 1 Choose Tools, Options and click E-Mail Options on the Preferences tab.
- 2 In the E-Mail Options dialog box (see Figure 7-16), select the Save Copies Of Messages In Sent Items Folder check box to have Outlook retain sent messages. If you want to prevent Outlook from keeping a copy of sent messages, clear this check box. Click OK.



Figure 7-16. In the E-Mail Options dialog box, you can choose whether Outlook saves copies of sent messages.

tip If you need to change Outlook's behavior for a single message, you can override the setting. With the message form open, choose File, Properties and then select the action you want Outlook to take.

Saving Attachments to a Disk

It's a sure bet that some of the messages you receive include attachments such as documents, pictures, or applications. In general, you can work with these attachments in Outlook without saving them separately to disk. For example, you can double-click an attachment in the InfoBar to open the attachment. The next step then depends on the attachment's extension and the application with which that extension is registered on your system.

But in many instances, it's necessary to save attachments to disk. For example, you might receive a self-extracting executable containing a program you need to install. In that case, the best option is to save the file to disk and install it from there.

You can save attachments using either of these methods:

- If you're using the preview pane, right-click the attachment in the InfoBar and choose Save As.
- Choose File, Save Attachments if you want to save one or more attachments or if the preview pane is not available. This option is handy when you want to save all attachments.

Saving Messages to a File

Although Outlook maintains your messages in your store folders, occasionally you might need to save a message to a file. For example, you might want to archive a single message or a selection of messages outside Outlook or save a message to include as an attachment in another document.

You can save a single message to a file or combine several messages into a single file. When you save a single message, Outlook gives you the option of saving it in one of the following formats:

- **Text Only.** Save the message as a text file, losing any formatting in the original message.
- **Rich Text Format.** Save the message in RTF format, retaining the original message formatting.