Section 4

Advanced Mail

By the end of this Section you should be able to:

Save Messages and Attachments
Prioritise Messages
Send and Open Attachments
Print Messages
Delete Messages
Add a Signature
Create a New Folder
Move Messages
Create Rules
Print Folder Contents

Exercise 21 - Addressing a Message

Guidelines:

You can use *Outlook's* **Contacts** to quickly and easily select recipients for your messages without needing to type in their e-mail address each time. In addition to sending messages to people using the **To** box, you can also send copies to other people using the **Cc** (carbon copy) and **Bcc** (blind carbon copy) boxes.

Actions:

1.   Click the **New E-mail** button to start a new message.
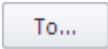
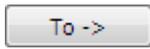2.   Click the **To** button, [To...], to open your **Address Book**.

Note: *The **Global Address List** may be displayed by default. It is usually not possible to add names to this list as it is automatically created and maintained by your server (and lists all users on your network).*
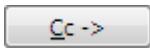
3.   Click on the drop down arrow under **Address Book** and select **Contacts**.
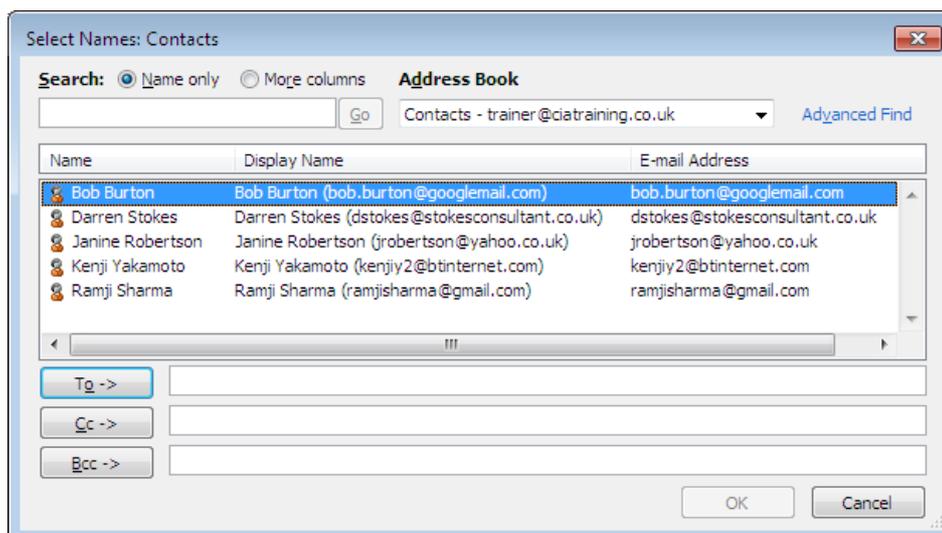
Note: *The contact details for you and three of your friends, created in earlier exercises, should be shown.*

4.   Select a friend's name from the list and click the **To** button, [To ->], to insert that person's e-mail address in the **To** box.
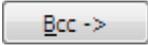
Note: *A carbon copy (**Cc**) of this message can be sent to another recipient who needs to take some action on it.*

5.   Select another friend from the list and click the **Cc** button, [Cc ->]. Their name appears in the **Cc** list.

continued over

Exercise 21 - Continued

*Note: Recipients in the **To** box will be able to see that you have copied the message to the addresses shown in the **Cc** box, and vice versa. To send a copy of the message to someone without those in the **To** and **Cc** boxes knowing, you can use the blind carbon copy (**Bcc**) box.*

6.   Select a third friend from the list and click the **Bcc** button, Bcc ->. Their name appears in the **Bcc** list.

7.   Click **OK** to close the dialog box and return to the **Untitled Message** window. Notice that the **To**, **Cc** and **Bcc** fields are automatically filled.

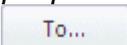|	To...	David Lyon (dave@lyonsaa.co.uk)
Send	Cc...	Darren Stokes (dstokes@stokesconsultant.co.uk)
	Bcc...	Rav Patel (rav@ironworks.net)
	Subject:	

*Note: You can click the **To**, **Cc** or **Bcc** button to open your **Address Book**.*

8.   In the **Subject** box, enter: **Test Message**.

9.   Type the following message text into the e-mail body:

   E-mail can be used to catch up with your friends, wherever they are, for free!

10.   Leave the message open for the next exercise.

*Note: To send the same message to several people in the **Address Book** who are not in a contact group, click the **To** button, To..., then add each contact individually before clicking **OK**.*

*Note: If the **Bcc** box is not present, display the **Options** tab and toggle the **Bcc** button in the **Show Fields** group.*

Exercise 22 - Saving Drafts

Guidelines:

Occasionally, you may be in the middle of typing a message when you have to leave it, perhaps to check information. This doesn't mean the message is lost - you can save a draft copy and come back to it later.

Actions:

1. The **Test Message** should be open from the previous exercise.

2. You'd rather wait before sending the e-mail. Click the **Close** button on the message window's **Title Bar**, ⬚. The following prompt appears:
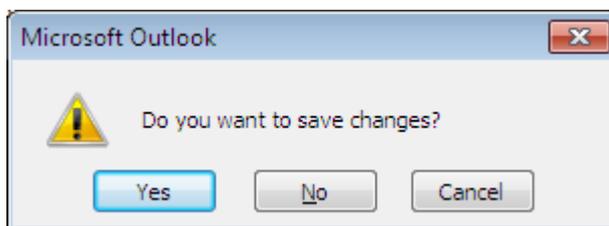
3. Click **Yes**. The message is automatically saved in the **Drafts** folder (the **Drafts** folder will be created if one does not exist already).

4. Select **Drafts**, 📝 **Drafts [1]**, from the **Folders List** on the **Navigation Pane**. There should be at least one item in the **Message List** – the **Test Message** draft.

5. Double click on the message in the **Message List** to open it. You can now continue the e-mail from where you left it.

6. Add the following sentence to the e-mail body: **It is quick and very easy to use**.
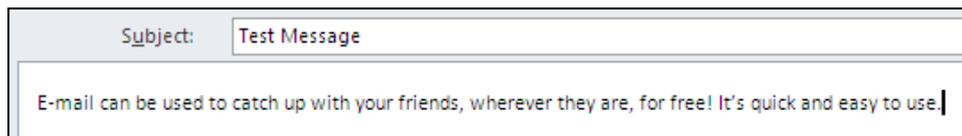
7. Click the **Save** button, 💾, on the message's **Quick Access Toolbar**, to save these changes.

8. Close the message by clicking the **Close** button, ⬚.

Exercise 23 - Saving Messages

Guidelines:

By default, *Outlook* automatically saves unsent messages in the **Drafts** folder. However, should you wish to save a message outside of your mailbox (to create a backup copy for example), it can be saved externally as a mail message file.

Actions:

1. The **Test Message** should be selected in the **Draft** folder's **Message List**.

2. Display the **File** tab and select **Save As** to open the **Save As** dialog box.

3. Find the location of the data files folder (see Note on Page 4), and then from the **Save as type** drop down list, select **Outlook Message Format**.
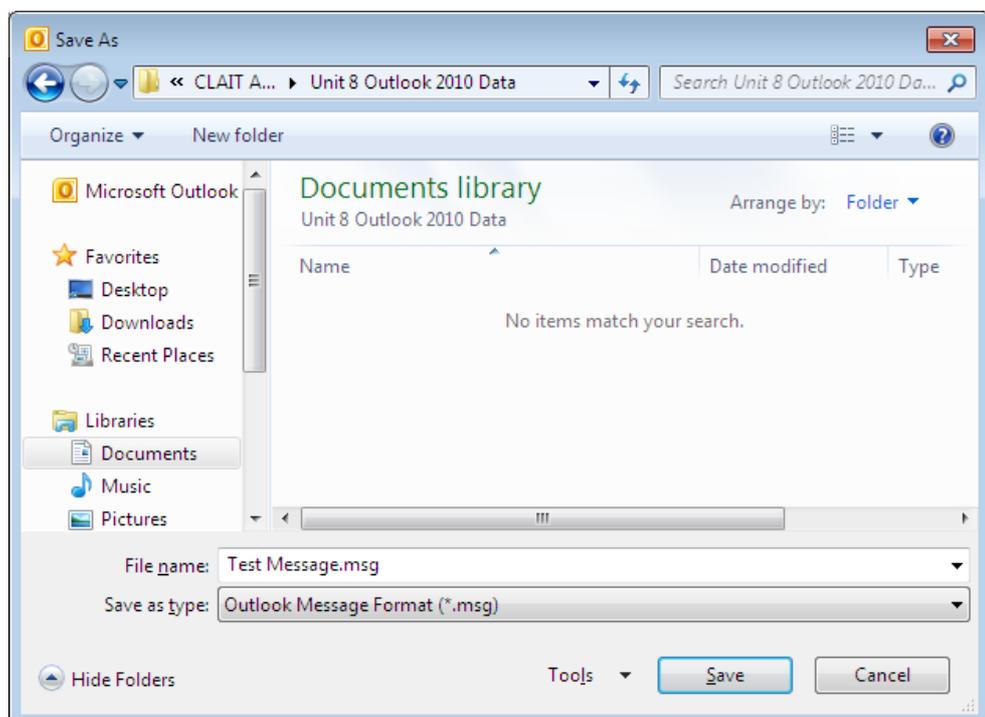
*Note: Outlook uses the message subject text as the default file name. It is also possible to save messages in **Text Only** or **HTML** (web) format, or as an **Outlook Template** file.*

4. Keep the default file name, **Test Message**, and click **Save**.

5. The e-mail has been saved.

6. To open the saved message again, click the **Start** button, , on the **Taskbar** and select **Documents**.

continued over

Exercise 23 - Continued

7.   In the **Windows Explorer** window that appears, locate and select the folder containing the data files.
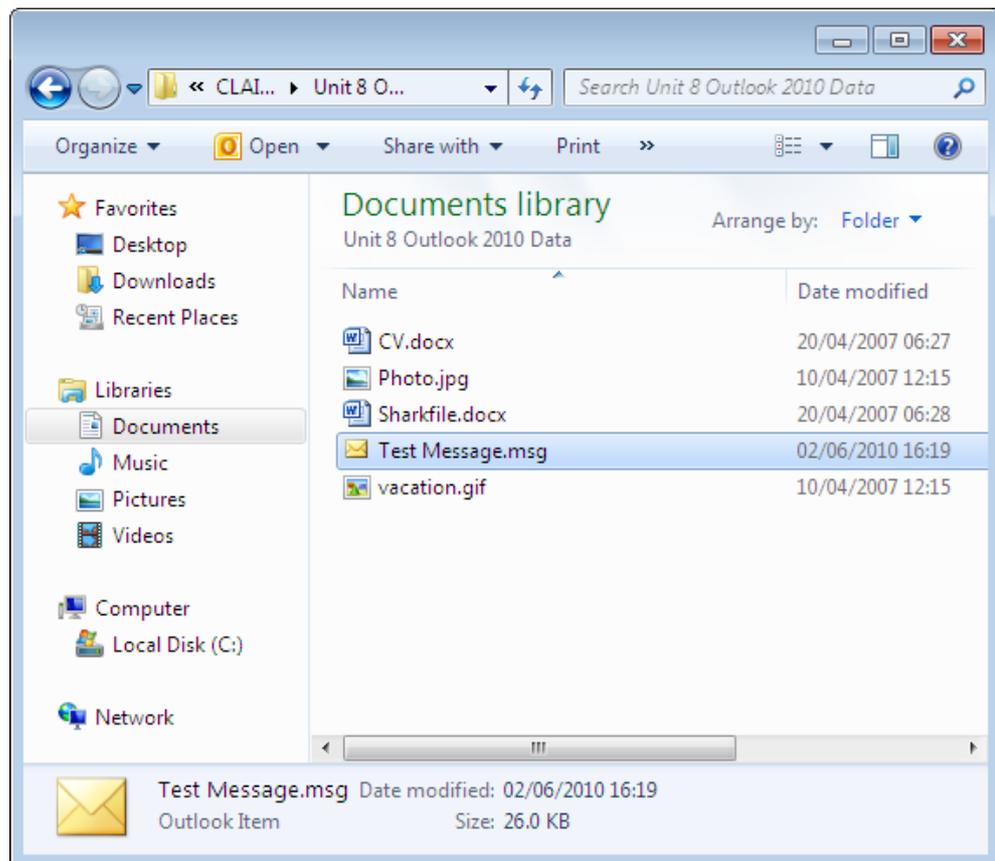
8.   Double click on the file **Test Message**. The message is once again opened in an *Outlook* message window.

Note: *If the message was saved in a different file format it will be opened in the appropriate application, e.g. an HTML file will be opened in Internet Explorer.*

9.   The message can now be edited as before. It could be modified and sent, but for this exercise close the message by clicking the **Close** button, ⊠.

10.   Close the **Windows Explorer** window to return to *Outlook*.

Exercise 24 - Setting Message Priority

Guidelines:

Messages have **Normal** priority by default, but it is possible to change their importance to either **High** or **Low**. This does not mean that they are sent more quickly or slowly, only that the recipient will be aware of their urgency by an icon on the message.

Actions:

1.   Start a new message.

2.   Address it to yourself and enter the subject as **Urgent!**

3.   In the e-mail body, type: **Don't forget the meeting with the area manager at 2pm today**.

4.   Make sure the **Message** tab is displayed on the **Ribbon** and click the **High Importance** button, , from the **Tags** group.

5.   Click **Send**, then if necessary **Send/Receive All Folders** on the **Send/Receive** tab to send the message.

6.   When the message arrives in the **Inbox** (as you sent it to yourself), it will have an **Importance** icon set, .

Note: *The process to make a message low importance is the same. Select the **Low Importance** button from the **Ribbon** at step 4. A low importance icon, , will be shown when the message is received.*

Note: *Although less common, you can also set the **sensitivity** of a message to **Personal**, **Private** or **Confidential**. When creating a new e-mail, click the **Tags** group dialog box launcher, , to display the **Properties** dialog box.*

Exercise 25 - E-mail Attachments

Guidelines:

It is possible to attach any sort of file to an e-mail message in *Outlook*, provided it does not exceed any size/type restrictions imposed by the destination mailbox (if this is the case the message will be returned undelivered). This makes it easy to send reports, charts, sound files or pictures, for example. When the message reaches its destination, a paperclip icon, , will let the recipient know there is an attachment.

Actions:

1. Make sure the **Home** tab is selected and click the **New E-mail** button.

2. Type your own e-mail address in the **To** box and enter the subject as **Marketing**.

3. In the e-mail body, type the following text:

    I've had another application for the post of Marketing Assistant. Her CV and photograph are attached.

4. Click the **Attach File** button and the **Insert File** dialog box will appear.

5. Select the location where the data files are stored and select the **CV** file. Click **Insert** to attach it.

6. The attachment appears in a new **Attached** box under the **Subject**.

Note: *Depending on your default mail format settings, attachments may appear as icons in the e-mail body.*

7. To attach a second file, repeat steps 4 and 5, this time selecting the **Photo** file from the same data file location.

8. Click **Send** to send the message together with its attachment, then if necessary **Send/Receive All Folders** on the **Send/Receive** tab to send the message.

Note: *Outlook will prevent you from sending messages with potentially unsafe attachments (files that are more likely to contain viruses). These include programs that have .exe extensions or scripts that have .bat extensions.*

9. Leave the **Mail** view open for the next exercise.

Exercise 26 - Attaching Large Files

Guidelines:

Attaching large files to e-mail messages can cause problems. They can be slow to transmit, and many mail systems will prevent delivery of messages with attachments over a certain size.
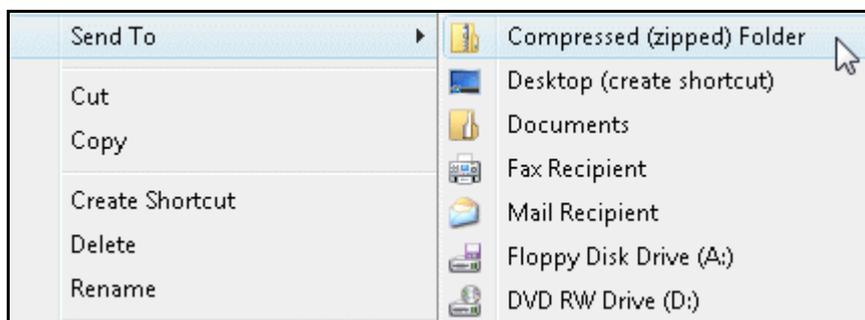
Fortunately, *Windows* allows you compress files down to a fraction of their original size so that they can be stored or transmitted much more easily. This process is sometimes called **zipping** and the compressed file has a **.zip** extension. The files cannot be used in their compressed state but must first be uncompressed (or **unzipped**).

Actions:

1. Create a new email and address it to yourself. Enter **Sharks** as the subject, and in the e-mail body type the following text:

    You may find the attached information useful.

2. Click the **Attach File** button to display the **Insert File** dialog box.

3. Right click on **Sharkfile** and choose **Send To**. On the submenu that appears, select **Compressed (zipped) folder**.

Send To	▶	Compressed (zipped) Folder
		Desktop (create shortcut)
Cut		Documents
Copy		Fax Recipient
Create Shortcut		Mail Recipient
Delete		Floppy Disk Drive (A:)
Rename		DVD RW Drive (D:)

4. A compressed folder named **Sharkfile.zip** is created, containing a <u>copy</u> of the original **Sharkfile.docx** file. Press <**Enter**> to confirm the name.

*Note: Notice that the compressed version of the file is smaller than the original. You may need to change the view to **Details** to see this.*

5. Click **Insert**. The compressed folder is added as an attachment.

Subject:	Sharks
Attached:	📎 Sharkfile.zip (14 KB)
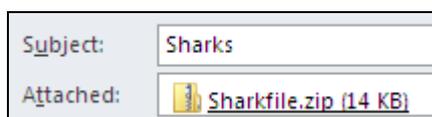
6. Click the **Send** button. The message and its attached files are transmitted.

Exercise 27 - Receiving Attachments

Guidelines:

When a message containing attachments is received, it will be marked with a paper clip icon, 📎. The attachments may be opened and/or saved to your computer outside of *Outlook*, to use at a future date or so that they can be thoroughly checked for viruses before opening.

When compressed files are received they must be uncompressed before use.

Actions:

1. Your **Inbox** should contain two new e-mail messages with attachments: **Marketing** and **Sharks** (sent in previous exercises). Notice the paperclip icons on the messages.

◢ Today		
✉ Trainer	10:13	📎 ☐ ⚑
Sharks		
✉ Trainer	10:11	☐ ⚑
Marketing		📎
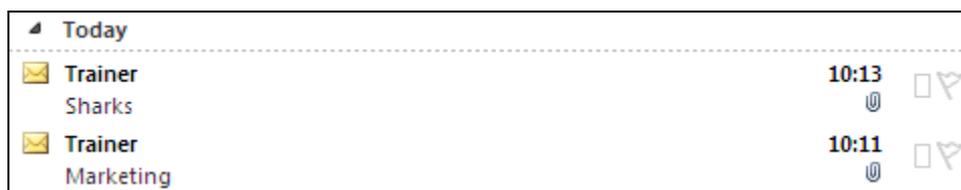
Note: *If the messages have not arrived yet, wait a few moments before clicking the* **Send/Receive All Folders** *button again.*

Note: *It is possible that Outlook will identify these messages as* **Junk Mail** *and store them in a special* **Junk E-mail** *folder (if present). If so, open the* **Junk E-mail** *folder from the* **Folder List** *on the* **Navigation Pane**. *Selecting the relevant messages in turn, click the* **Junk** *button,* 🚫 Junk ▾ *, on the* **Home** *tab, and select* **Not Junk**. *The message will be moved to the* **Inbox**.

2. Click on the **Marketing** message to preview it in the **Reading Pane**.

    Marketing
    Trainer
    Sent: Thu 03/06/2010 10:11
    To: Trainer
    ✉ Message   📄 CV.docx (15 KB)   🖼 Photo.jpg (7 KB)

    I've had another application for the post of Marketing Assistant. Her CV and photograph are attached.

3. Click the **CV** and **Photo** icons in turn. *Outlook* previews the attachments in the body of the e-mail.

continued over

Exercise 27 - Continued

Note: Outlook will not automatically preview certain file types (such as .exe or .bat files) that are more likely to contain viruses.

4. Click the **CV** icon and select **Open** from the new **Attachments** tab on the **Ribbon** (or double click the **CV** icon). Dismiss any warning messages.

5. *Word* starts and displays the contents of the attached file.

*Note: Microsoft Word 2010 may start in **Protected View**. As attachments are a common source of computer viruses, **Protected View** prevents them from making any changes to your computer.*

6. Close *Word* to return to *Outlook*.

7. To save the attachment without opening it, make sure the **CV** icon is selected in the message and click **Save As** on the **Attachments** tab.

8. When the **Save Attachment** dialog box is displayed, ensure that the save location is the data files folder.

9. Rename the **File name** to **Applicant.docx**.
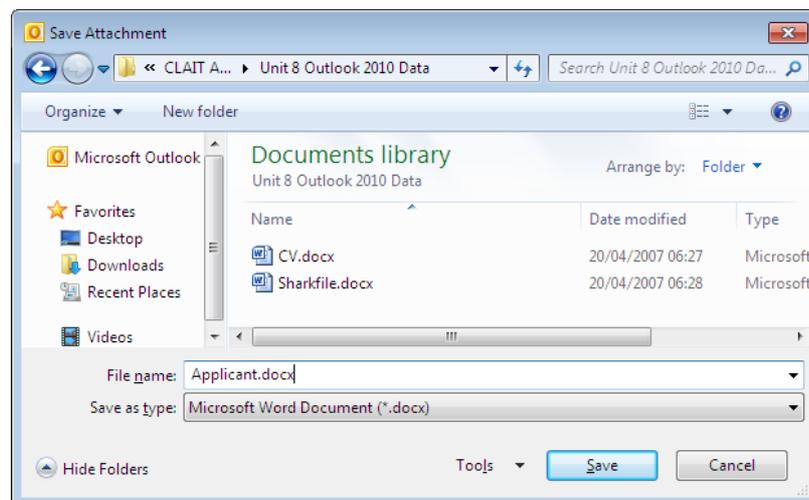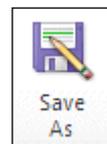
10. Click **Save** to save the attached file. The new file can now be found in the data files folder.

*Note: The **Save All Attachments** button can be used to save all attached files at the same time.*

Note: Always be vigilant about e-mail messages with attachments – even those from friends – as they can potentially contain viruses. Ensure you have antivirus software installed on your computer and keep it up-to-date by allowing it to automatically download updates. As a rule, always save attached files to disk and scan them with your antivirus software before opening. If you do open a message attachment that contains a virus, the results can be disastrous for your computer (and possibly the other computers on your network).

Exercise 28 - Printing a Message

Guidelines:

You may need to print a message to provide a hard copy for reference (but only do so when necessary to avoid wasted printing costs). The **Print** dialog box is used to control the number of copies and the print range.

Actions:

1.   Within **Mail** view, select the message **Sharks**.

2.   Display the **File** tab and click **Print** (or simply press <**Ctrl P**>). The **Print** screen is displayed.
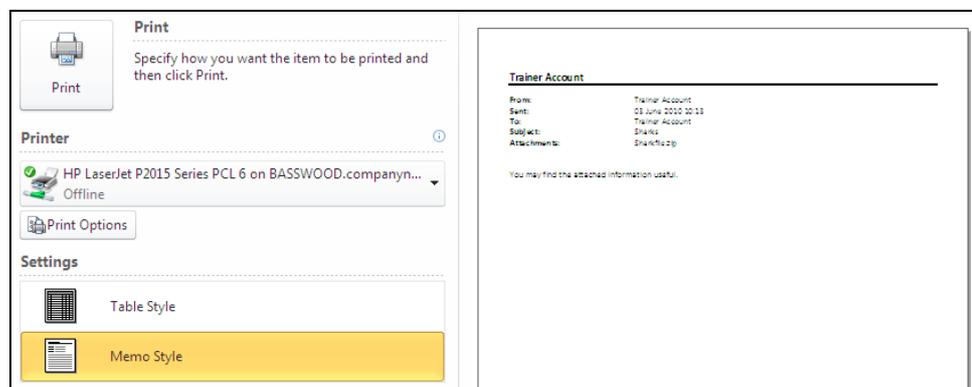
Note: A preview of the message as it will be printed is automatically shown on the preview panel.

3.   Select a printer from the **Printer** drop down list (your default printer, if available, will be automatically selected).

4.   Make sure **Memo Style** is selected in the **Settings** group.

5.   To print more than one copy of an e-mail, click the **Print Options** button, **Print Options**. A **Print** dialog box appears.

6.   In **Number of copies** (within the **Copies** group), use the up spinner to increase the number to **2**.

*Note: To only print specific pages rather than the entire message, enter the desired page numbers (or range of page numbers, e.g. 2-3) in the **Pages** box.*

*Note: You can also choose to print all attached files in addition to the message. To do this, select **Print attached files** in the **Print** options group.*

7.   Click the **Print** button to send two copies of the **Sharks** email to the selected printer. You will automatically return to the **Mail** view.

# Exercise 29 - Adding a Signature

Guidelines:

A personal signature can be added to the end of e-mail messages automatically, without the need to type it each time. You can set up any number of signatures in *Outlook* and can easily select the most appropriate one for the message you are composing.

Actions:

1. To create a signature, display the **File** tab from the main *Outlook* window, and select **Options**.

2. Select **Mail** from the categories list on the left. In **Compose messages** there is an option to maintain signatures.
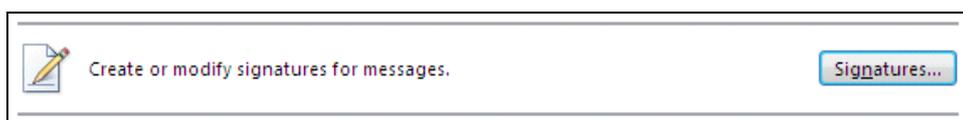
3. Click the **Signatures** button.
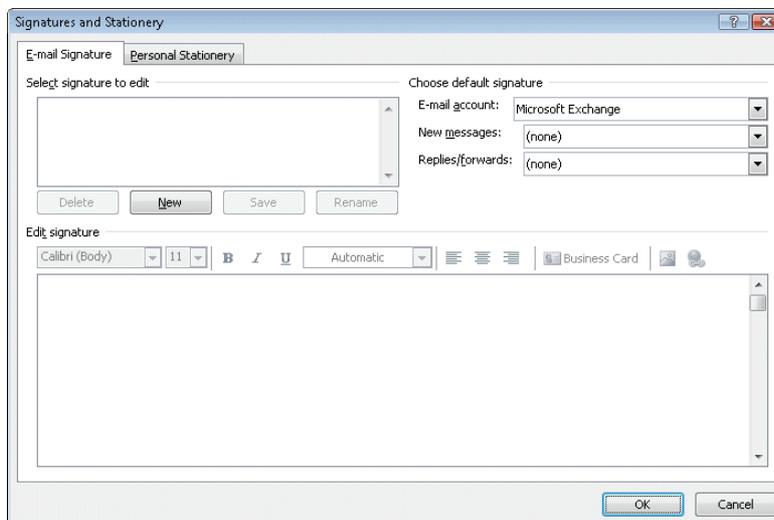
4. Click the **New** button. Enter a name for your signature to help you identify it (e.g. **Full Title**), and then click **OK**.

5. In the large **Edit signature** box, enter your name and, on the next line, a job title and department (or company name). For example:

> **Kate Jones**
> **Financial Controller**
> **Midlands Division**

Exercise 29 - Continued

6. Highlight your name and click the drop down arrow on the **Font** box,
   | Calibri (Body) | ▼ |.

7. Scroll down the list of fonts and select **Freestyle Script** (or similar to that shown below) and a **Size** of **24**.

8. To add this signature automatically to all new messages, click the drop down arrow in the **New Messages** box (under **Choose default signature**) and select **Full Title**.
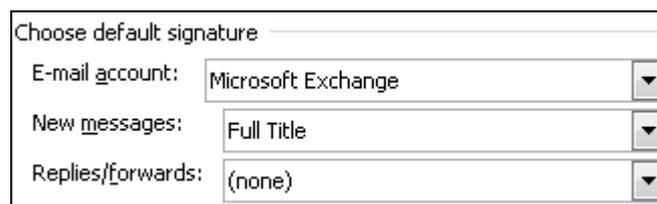
9. Click **OK**, then **OK** again to close the dialog boxes.

Note: Several signatures can be added in this way to cover various situations.

10. Start a new message. The signature automatically appears in the e-mail body. Highlight the signature text and delete it.

11. To add a signature manually, display the **Insert** tab on the **Ribbon** and click the **Signature** button from the **Include** group. A list of all available signatures is shown. Select **Full Title** (or the name chosen in step 3) and it will appear in the message again.

12. Close the message <u>without</u> saving.

13. To stop the signature appearing automatically, display the **File** tab from the main *Outlook* window and select **Options**. Select **Mail** from the list on the left and click the **Signatures** button again. Drop down the list for **New** messages and select **(none)**.

14. To delete a signature altogether, select it from the **Select signature to edit** list on the left of the dialog box and click the **Delete** button. Click **Yes** to confirm the action.

15. Click **OK** and **OK** again to close the dialog boxes.

# Exercise 30 - Conversations

Guidelines:

Rather than show all of your e-mails in one large list, *Outlook* can gather messages with the same subject title into groups of related messages, known as a conversation thread.

Actions:

1. Within the **Inbox** folder, select the **Marketing** message from the **Message List**.

2. Click on the **Reply** button in the **Respond** group, and in the reply window that appears enter the following text above the original message:

    Thank you. I will add this applicant to the list.

3. Click **Send**, then if necessary **Send/Receive All Folders** on the **Send/Receive** tab to send the message. As you are the original sender, the e-mail will be returned to you and will appear in the **Inbox**.

4. Display the **View** tab and select **Show as Conversations** from the **Conversations** tab.

5. From the dialog box that appears, select **This folder**. Messages within the **Inbox** only are now sorted by conversation; the **Marketing** message will appear grouped under the subject title **Marketing**.
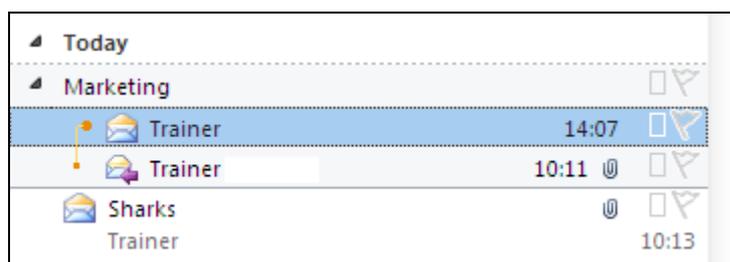
Note: *If only the latest message is shown, the conversation is minimised. Click the expand button, ▷, to view the entire thread.*

6. Click the first message in the group. The message is displayed in full on the **Reading Pane** (notice the original message below your reply).

Note: *A large bullet to the left of a message indicates it is a new message in that conversation thread. All messages in the history of that conversation, including the e-mails you've sent, appear connected by smaller bullets.*

7. Click the **Show as Conversations** check box and select **This folder** again to return to the previous view.

Exercise 31 - Creating a New Folder
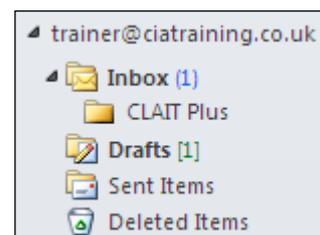
Guidelines:

To help organise your mailbox, it may be a good idea to create a system of folders in which to store your messages (this is particularly useful for filing messages from certain people or on a specific subject). Messages can be moved between folders as required and easily deleted (or archived to an external file to back-up your messages).

Actions:

1. To create your own mail folder within the **Inbox**, first make sure the **Inbox** is selected in the **Folders List**.

2. Display the **Folder** tab and click the **New Folder** button in the **New** group to display the **Create New Folder** dialog.
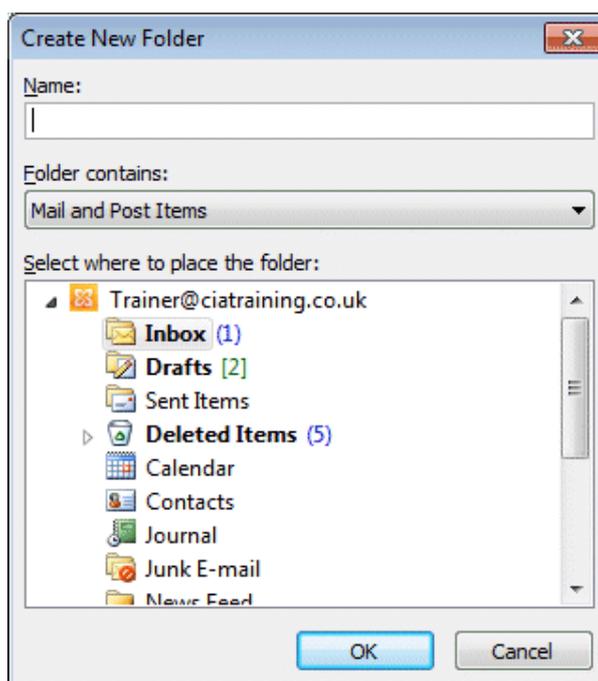
3. In the **Name** box, type **CLAIT Plus** and click **OK**. The new folder has been created.

4. The **Folders List** changes to show the new folder underneath **Inbox**. If the structure within **Inbox** is hidden, expand it now by clicking the arrow to the left, .
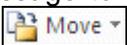

Note: *Folders can be created within any of the displayed folders. To delete a selected folder, display the **Folder** tab and click **Delete Folder** in the **Actions** group.*

Exercise 32 - Moving Messages

Guidelines:

Once folders have been created in your mailbox, messages can be moved to them if necessary.
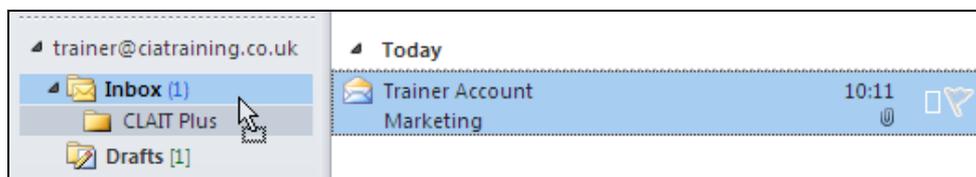
Actions:

1. Make sure the **Inbox** folder is selected in the **Folders List**.

2. Select the **Marketing** message from the **Message List**.

3. To move this message to another folder, display the **Home** tab and click the **Move** button, , in the **Move** group.

4. Select the **CLAIT Plus** folder that you created earlier.
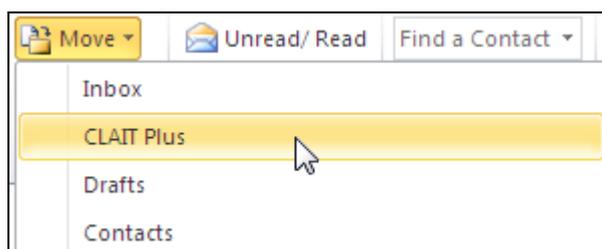
5. The message is moved.

6. Select the **CLAIT Plus** folder, , from the **Folders List**. The **Marketing** message appears in the **Message List**.

Note: *Messages can also be moved by clicking and dragging them from the **Message List** to another folder in the **Folders List**.*

7. To move the message back to the **Inbox**, click and drag the **Marketing** message from the **Message List** to the **Inbox** folder on the **Folders List**. Release the mouse over the folder to drop it.

8. Open the **Inbox** folder to see that the message has been moved back.

9. Leave the **Mail** view open for the next exercise.

Exercise 33 - Creating Rules

Guidelines:

Rules can be created in *Outlook* to automatically perform actions when certain messages are received. For example, messages on a particular subject can be automatically moved to a specific folder (or messages from certain people can create an alert).

Actions:

1. Make sure the **Inbox** is selected and the **Home** tab is displayed. Select the **Marketing** message from the **Message List**.

2. To create a rule based on the selected message (which is easier than creating a new rule from scratch), click the **Rules** button, [Rules ▾], in the **Move** group and then select **Create Rule**.

3. To instruct *Outlook* to move all incoming mail with the word "Marketing" in the subject to a specific folder, check the **Subject contains** option (and replace the text with **Marketing** if it is not already so).

4. Check the **Move the item to folder** option. From the dialog box that appears, select the **CLAIT Plus** folder and click **OK**. You may need to expand **Inbox** to see it.
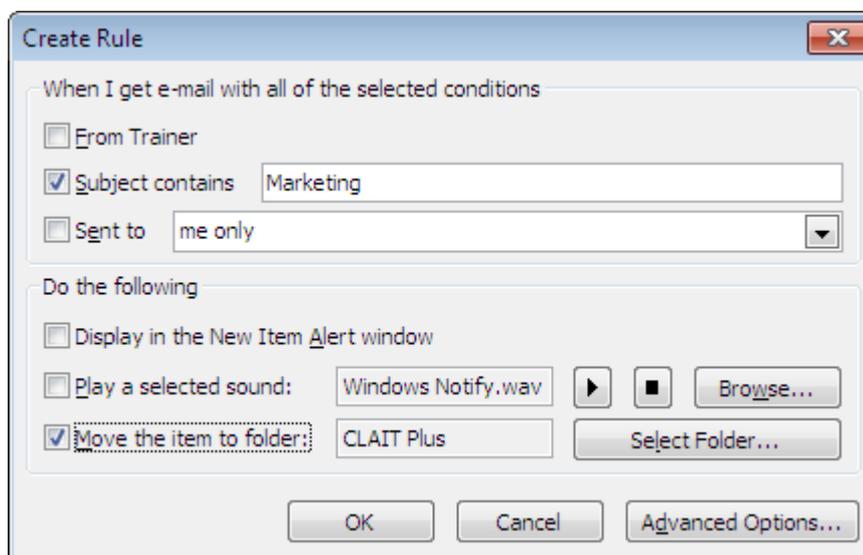
5. Click **OK** again. A dialog box appears confirming that the rule **Marketing** has been created successfully.

Note: *You can also apply new rules to items already in your mailbox by selecting the* ***"Run this rule now…"*** *checkbox.*

continued over

Exercise 33 - Continued

6.   Click **OK** to close the dialog box and activate the rule.

*Note: Many more rule conditions and actions can be applied by clicking the **Advanced Options** button on the **Create Rule** dialog box.*

7.   From now on, all e-mail addressed to you with **Marketing** in the subject will be automatically placed in the **CLAIT Plus** folder, not the **Inbox**.

8.   Test the rule by sending yourself a message with the word **Marketing** somewhere in the subject.

*Note: You can also apply new rules to items already in your mailbox by clicking the **Run Rules Now** button in the **Clean Up** group on the **Folder** tab.*

9.   To remove a rule, make sure the **Inbox** and **Home** tab is displayed and click the **Rules** button again. Select **Manage Rules & Alerts**.
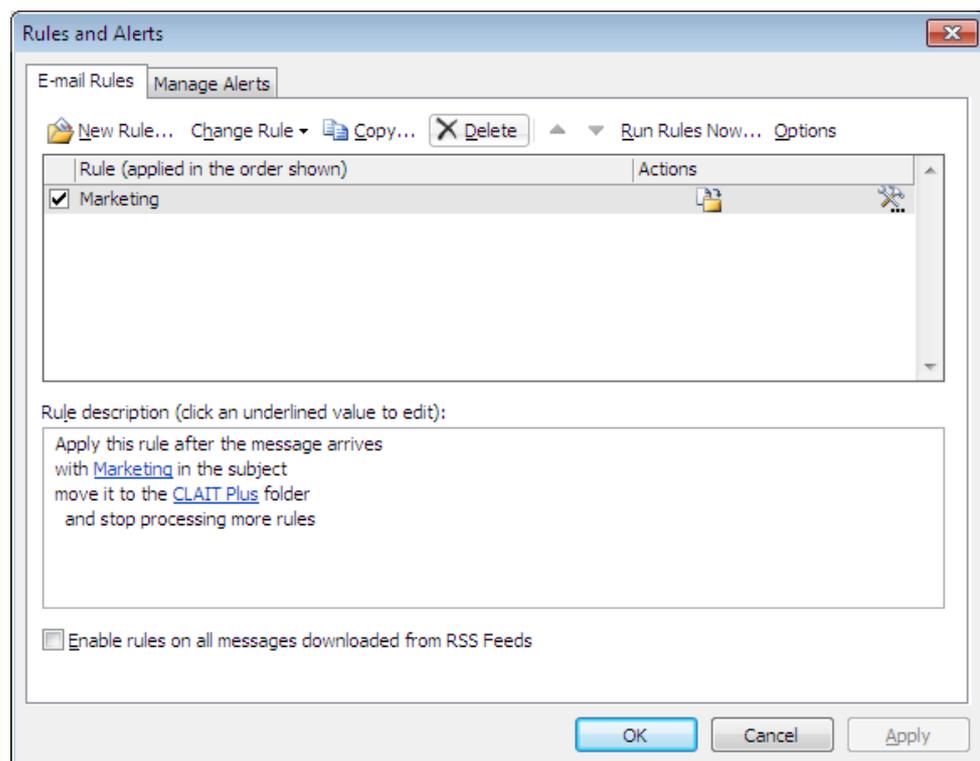
10.   A list of rules appears in the **E-mail Rules** tab. Select the rule you just created (called **Marketing**) and click **Delete**.

11.   Click **Yes** to confirm then click **OK** to close the dialog box. The rule will no longer affect your mailbox.

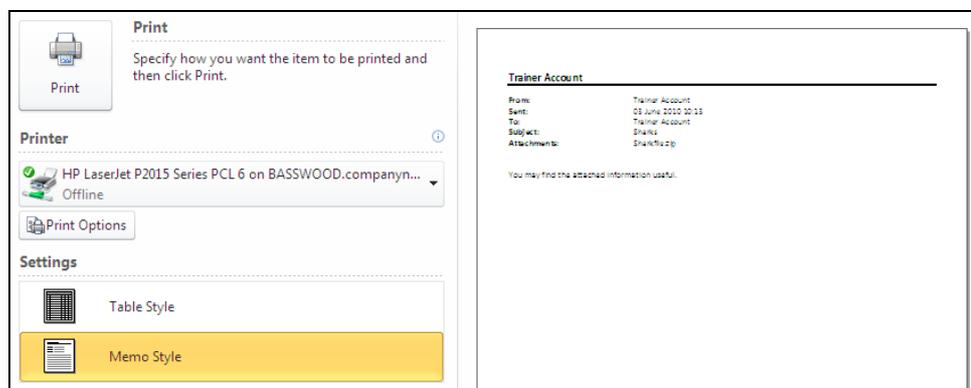12.   Leave the **Mail** view open for the next exercise.

Exercise 34 - Printing Folder Contents

Guidelines:

You can print the contents of a folder to provide a record of all the messages contained in that folder.

Actions:

1. Within the **Inbox** folder, display the **File** tab and click the **Print** button. The **Print** screen is displayed.

2. Select **Table Style** in the **Settings** group. A list of messages contained in the selected **Inbox** folder are shown.

Note: A preview of the message as it will be printed is automatically shown on the preview panel.

3. Select a printer from the **Printer** drop down list (your default printer, if available, will be automatically selected).

4. Click the **Print** button to print a single copy of your **Inbox** contents to the selected printer.

5. You will automatically return to the **Mail** view.

*Note: You may need to produce a printout of the contents of a folder during the assessment for this unit. This can also be achieved by using the <**Print Screen**> key on your keyboard to capture the current screen as an image. You can then paste this image into another program, e.g. Paint or Microsoft Word, in order to print or save it.*

Exercise 35 - Deleting Messages

Guidelines:

All messages received are stored in the **Inbox**, which often has strict size limits imposed upon it by your company or internet service provider. After a period of time you will probably want to remove old, redundant messages. Once selected, messages can be deleted and are moved from the **Inbox** to the **Deleted Items** folder, a temporary store, until confirmation of permanent deletion.

Actions:

1. With the **Inbox** folder open, select the **Sharks** message.

2. Make sure the **Home** tab is selected, and then click the **Delete** button. The e-mail is removed from the **Inbox**.

Note: *To select all messages, press <**Ctrl A**>; to select non adjacent messages hold the <**Ctrl**> key and click the required messages; to select a range, use the <**Shift**> key and click the first and last messages.*

3. Select **Deleted Items** from the **Folders List** on the **Navigation Pane**, Deleted Items (6). The **Message List** will now show all deleted e-mail.

4. To retrieve the **Shark** e-mail and restore it to the **Inbox**, click on it, and then select **Move** on the **Ribbon**. From the list that appears, select **Inbox**.

5. View the **Inbox** folder to see that the message has been restored.

Note: *A deleted message can also be clicked and dragged from where it is being viewed in the **Deleted Items** folder to the required folder in the **Folders List**.*

6. Delete the message again, but this time use the <**Delete**> key (which is an alternative method of deletion).

7. View the **Deleted Items** folder; the message has reappeared.

8. To empty the **Deleted Items** folder, display the **Folder** tab and click the **Empty Folder** button in the **Clean Up** group.

9. On the warning message box, select **Yes** and the messages will be permanently deleted.

Note: *The useful **Clean Up Folder** button, also in the **Clean Up** group, can be used to automatically delete redundant e-mails from your mailbox. Messages that are old or have not been accessed in a long time will be removed and placed in the **Deleted Items** folder. Unread or flagged messages will not be affected.*

10. Return to your **Inbox** folder and leave it open for the next exercise.

Exercise 36 - Revision

1. Create a new, self-addressed message with **high** importance.

2. The subject is **Holiday**. The message should read as follows: **Remember to book next year's holiday this weekend**.

3. Save the message externally to the data file location as **Holidays** in **Outlook Message Format**.

4. Attach the file **vacation** from the data files.

5. Send the message.

6. When the message returns, save the attachment to the data file location, changing the name to **suitcase**.

7. Create a new distribution list named **Colleagues** and add two or three workmates to it.

8. Create a message to the **Friends** distribution list. The subject is **Test Distribution** and the message is **I'm sending this as part of the CLAIT Plus 2006 course. There is no need to reply**.

9. Include your own address in the **Cc** box.

10. Send the message.

11. View the sent messages and print the **Test Distribution** message.

12. Create a new folder in the **Inbox** and name it **Revision**.

13. Move the **Holiday** message from the **Inbox** into the new folder.

14. Delete the **Revision** folder.