

Exact Business Solutions Pty Ltd

Course Outlines



Advanced Microsoft Outlook 2003

A One-Day Guide

Ref No.DD179

Course Aims This course aims for participants to learn how to use some advanced features in Outlook, including customising menus, toolbars and messages. The course also looks at integrating Outlook components and share Outlook data with other office applications including merging from Outlook.

Objectives At the end of the course, you will have learned to:

- Customise Outlook
- Customise the Outlook bar
- Customise menus and toolbars
- Handle Messages
- Use the Rules Wizard
- Use the Out of Office Assistant
- Auto-Archive your Mailbox
- Work with Outlook folders including Notes, the Journal, the Calendar and Contacts
- Use the Voting Feature
- Use Folders to share information
- Share Information including calendars and Inbox
- Manage Delegate Access
- Import and Export data
- Create and Use Categories and Filters
- Create Personal Distribution Lists
- Mail Merge Outlook Contacts to Microsoft Word
- Design a Form and use it as a Template

Number of Pages 183

Audience The course is aimed at those participants who want to use the more advanced features of Outlook including co-ordinating schedules, archiving mail and mail merge.

Prerequisites It is essential that participants have good working knowledge of the topics covered in the Microsoft Outlook 2003 introductory course.

Course Length In a training environment this manual is suitable for 1 Day.

Course Structure The course contains instructor lead exercises as well as examples completed at the students' own pace.

Advanced Microsoft Outlook 2003 in Detail

Customising Outlook

Customising the Navigation Pane
Using the Split Bar
Changing the Display Order
Adding Buttons to the Navigation Pane
The Favourites Folder
Adding a Favourite Folder

The Shortcut Pane

Creating a Shortcut
Creating a Group Shortcut
Deleting a Shortcut

Customising Toolbars

Adding an Icon to the Toolbar
Modifying an Icon
Modifying a ScreenTip and Text

Customising Menus

Creating Menus Renaming the
Menu
Adding Menu Commands

Resetting Menus

The Rules Wizard

Creating a Rule
Modifying a Rule
Create a Rule Based on a Message.
Renaming a Rule
Applying the Rule
Rule Order.
Turning Rules On and Off
Deleting Rules

The Out of Office Assistant

Replies sent to Another Person .

Using AutoArchiving

Turning on AutoArchive
AutoArchive Options
Setting Folder Properties

Retrieving Archived Items

Importing Archived Items

Importing into Original Folders
Importing into a new Folder
Turning AutoArchive Off

Voting

Custom Voting Buttons
Viewing Voting Responses

Permissions

Setting the Permission Level
Viewing another user's Calendar .
Removing Permissions

Delegate Access

Add Another Person's Mailbox .
Send an e-mail message
Removing Delegate Access

Calendar

Printing a Blank Calendar

Customising the Calendar

Displaying/Removing End Times
Showing Times as Clocks
Changing the Time Scale
Changing the Background Colour
Date Navigator Font.
Reminders and Reminder Sounds
Week Numbers
Bold dates in the Date Navigator
Saturdays and Sundays
Hiding Private Appointment Details

Forwarding Appointments

Categories

Assigning a Category
Creating a Category
Adding Birthday Events

Filters

Creating a Filter
Filtering Calendar Appointments
Clearing a Filter

Personal Distribution Lists

Create a Personal Distribution List
Using the Distribution List
Adding a Name to the List
Deleting a Name from the List

Meetings

Requesting a Meeting
Inviting Others
Choosing the Meeting Time
Inviting Others Later
Checking Responses to a Meeting
Adding an External Attendee

Notes

Sending Notes Fast
Create a Note from Word
Assigning Categories to Notes

The Journal

Journal Options
Viewing Other Journal Items
Changing Entry Type Settings
Tracking a Phone Call
Choosing a Journal Contact
Restarting the Timer
Adding Tasks to the Journal
Journal Views

Viewing Items in Month View

Adding Meetings to the Journal

Viewing the Meeting Items
Viewing Items in Month View
Deleting Journal Items
Deleting Entry Types

Mail Merge Contacts to Word

Prepare a Contact list for Export .

Starting the Merge

Edit the Main document.

Perform the Mail Merge.

Exporting Data

Importing Data

Group Email Distribution

Starting the Merge

Previewing the Letters

Performing the Merge

Forms and Templates

Designing the Form

Deleting a Control

Sizing a Field

Using the Control Toolbox

Adding a Label Control

Combo Boxes

Control Properties.

A Text Box

Initial Values

The Read Page

Saving the Form as a Template

Using a Form

Editing your Custom Form

Custom Forms Exercise 1

Custom Forms Exercise 2

Shortcuts

Using Shortcut Keys