I. INTRODUCTION

Microsoft Outlook 2003 allows users to send and receive email messages. The Outlook software must be configured with the users Pace profile and server settings to send and receive email.

It is the responsibility of Pace systems users to agree to the terms and conditions outlined in the Pace University Appropriate Use for Information Technology Policy and the Electronic Mail (Email) Policy and Procedures.

II. GETTING STARTED AND EXITING MICROSOFT OUTLOOK

To begin:

- click Start
- click Programs and select Microsoft Office
- select Microsoft Office Outlook 2003

Note: Some computers have Microsoft Outlook accessible from the desktop. If this is the case, double click the icon.

To exit Outlook:

- click File and select Exit

III. CONFIGURING MICROSOFT OUTLOOK

When Outlook opens for the first time, the Outlook 2003 Startup Wizard dialog box appears.

- click Cancel

The following Outlook 2003 Startup message appears.

- click Yes

Outlook 2003 is loaded.

- click Tools and select E-mail Accounts
Configuring Microsoft Outlook

The *Email Accounts* wizard dialog box appears.

- select **Add a new e-mail account** and click **Next**

The **Server Type** section appears.

- select **IMAP**

*Note: When using Internet Message Access Protocol (IMAP), messages and folders remain on the remote mail server. Access to the user’s updated mailbox is available from multiple locations and through Pace University’s Web interface.*

- click **Next**

The **Internet E-mail Settings (IMAP)** section appears, fill in the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Information:</td>
<td>Type <em>your full name</em> as it should appear on sent mail and type <em>your e-mail address</em>, i.e., Joe User is <em><a href="mailto:juser@pace.edu">juser@pace.edu</a></em>.</td>
</tr>
<tr>
<td>Server Information:</td>
<td>Incoming mail server (IMAP): type <em>email.pace.edu</em>. Outgoing mail server (SMTP): type <em>email.pace.edu</em>.</td>
</tr>
<tr>
<td>Logon Information:</td>
<td>Type <em>your user name</em>, i.e., Joe User is <em>juser</em> and type <em>your password</em>.</td>
</tr>
</tbody>
</table>

*Note: Users sharing a computer with other individuals should deselect Remember password. Having the system remember a password could give others access to an individual’s email account.*
Configuring Microsoft Outlook

• click Next
• click Finish

The Internet E-mail – email.pace.edu dialog box appears.

• type yourpassword and click OK

Where yourpassword is the user’s email password.

A. Saving Changes

It is a good practice to exit and restart Outlook after changes are made to Email Accounts or Options.

To save the changes:

• click File and select Exit

The profile configuration settings are now active.

IV. USING MICROSOFT OUTLOOK

A. Launching Microsoft Outlook

• double-click
• click next to email.pace.edu

The Internet E-mail – email.pace.edu dialog box appears.
Using Microsoft Outlook

- type *yourpassword* and click **OK**

Where *yourpassword* is the user’s email password.

- click 📨 Inbox

**B. Email Messages**

*Microsoft Outlook* consists of four panes:

<table>
<thead>
<tr>
<th>Pane</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation Pane</td>
<td>Displays all folders associated with the user account.</td>
</tr>
<tr>
<td>Message Pane</td>
<td>Displays all messages of a folder selected from the Navigation pane.</td>
</tr>
<tr>
<td>Reading Pane</td>
<td>Displays the contents of the highlighted email message from the Messages pane.</td>
</tr>
<tr>
<td>Favorite Folders</td>
<td>Displays folders to be quickly accessed by user.</td>
</tr>
</tbody>
</table>

Note: Incoming or unread email messages are placed in the Inbox folder.

Note: If the Reading pane does not display, click View and select Reading Pane, then click Right. If the Navigation pane does not display, click View and select Navigation Pane. View options can be altered to fit user’s preferences.
1. Viewing an Email Message

Email messages can be viewed in two ways.

- select the message and the body displays in the Reading Pane
- or-
- double-click the message in the Messages Pane

Note: The message appears in a separate window dedicated to the selected message.

a. Using the Standard Toolbar

The Standard Toolbar has the following options available:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>Opens a composition box to compose a new message.</td>
</tr>
<tr>
<td>Print</td>
<td>Prints the current message.</td>
</tr>
<tr>
<td>Move</td>
<td>Moves email from one folder to another.</td>
</tr>
<tr>
<td>Mark</td>
<td>Marks a message for deletion.</td>
</tr>
<tr>
<td>Reply</td>
<td>Replies to the sender of the email.</td>
</tr>
<tr>
<td>Reply All</td>
<td>Replies to the sender and all users on the recipient list.</td>
</tr>
<tr>
<td>Forward</td>
<td>Forwards the current message to another user.</td>
</tr>
<tr>
<td>Send/Receive</td>
<td>Downloads new messages from fsmail.pace.edu.</td>
</tr>
<tr>
<td>Find</td>
<td>Allows the user to search for a specific email.</td>
</tr>
<tr>
<td>Address</td>
<td>Creates a rule for incoming mail.</td>
</tr>
<tr>
<td>Address Book</td>
<td>Opens the users address book.</td>
</tr>
<tr>
<td>Find</td>
<td>Allows a user to find information about contacts such as addresses, phone numbers, etc.</td>
</tr>
<tr>
<td>Search</td>
<td>Provides a textbox to type an Outlook related question or topic. The Search button accesses Outlook Help and displays help options in a series of hyperlinks.</td>
</tr>
</tbody>
</table>
2. Sending an Email Message

To create a new email message:

- click 
- or-

- click Actions and select New Mail Message

The *Untitled Message* window appears.

Within the *Untitled Message* dialog box the following options appear:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send</td>
<td>Sends email message out.</td>
</tr>
<tr>
<td>Attach</td>
<td>Attaches a file or item to the email message.</td>
</tr>
<tr>
<td>Address Book</td>
<td>Opens the users address book.</td>
</tr>
<tr>
<td>Address Check</td>
<td>Automatically checks names in the To, CC and Bcc against names in the address book.</td>
</tr>
<tr>
<td>Priority High</td>
<td>Sets the priority of an email message to High.</td>
</tr>
<tr>
<td>Priority Low</td>
<td>Sets the priority of an email message to Low.</td>
</tr>
<tr>
<td>Message Flags</td>
<td>Message flags are used to indicate that a follow-up action to the email is necessary.</td>
</tr>
</tbody>
</table>
Accesses the Bcc, Email signature and Personal Stationary options.

Formats the outgoing email to HTML, Rich or Plain text.

To send an email:

- type **recipient’s email address** in the **To:** field
- type **brief email description** in the **Subject:** field
- type the **body of the email message** in the bottom pane
- click **Send**

Where **body of the email message** is the content of the email.

3. Adding a Signature

To create a signature:

- click **Tools** and select **Options**
- click **Mail Format**
- click **Signatures…**
- click **New…**

The **Create New Signature** dialog box appears.

- type **SignatureName** in **1. Enter a name for your new signature** box

Where **SignatureName** is the name given for the Signature.

- click **Next**
- type **SignatureInformation** in **Signature text** box
Using Microsoft Outlook

Where **SignatureInformation** is the information to be attached to the email.

- click **Finish**
- click **OK**
- click **OK**

To edit a signature:

- click **Tools** and select **Options**
- click **Mail Format**
- click **Signatures…**
- click **Edit**
- edit **SignatureInformation** in **Signature text box**

Where **SignatureInformation** is the information to be edited.

- click **OK**
- click **OK**
- click **OK**

To delete a signature:

- click **Tools** and select **Options**
- click **Mail Format**
- click **Signatures…**
- select **SignatureName** to delete
- click **Remove**

A message appears: “Are you sure you want to permanently remove this signature?”

- click **Yes**
- click **OK**
- click **OK**

4. Receiving an Email Message

- click **Send/Receive**
- or-
- click **Tools** and select **Send/Receive**
- click **Send and Receive All**

**Note:** Email messages are listed in the Messages Pane and new messages appear in bold.
5. Configuring to Schedule an Automatic Send/Receive.

Outlook can automatically check the email.pace.edu server for new messages.

- click **Tools**, select **Options** and click the **Mail Setup tab**
- click **Send/Receive button**
- click the checkbox next to **Schedule an automatic send/receive every**
- type **15** in the **minutes** box
- click **Close** and click **OK**

*Note:* It is University policy that users cannot autocheck for intervals less than 15 minutes.

6. Replying to an Email Message

- open an existing email message
- click or

*Note:* Reply responds to the individual that sent the email. Reply to All responds to the sender and everyone on the recipient list.

7. Deleting an Email Message

- highlight an email message
- click **Edit** and select **Delete**

a. Adding the Purge Deleted Messages Icon

It is important to remove unneeded messages from the Inbox. Full mailboxes cause messages to be rejected by the mail system and returned to the sender. The Purge Deleted icon permanently removes email messages.

- click **View**, select **Toolbars** and click **Customize**
- select the **Commands tab** and under **Categories** select **Edit**
- under **Commands** select **Purge Deleted Messages**
- drag and drop the selected command to the Standard Toolbar
- click **Close**

*Note:* The following icon appears on the Standard Toolbar: **Purge Deleted Messages**

C. Attachments

1. Sending Attachments

- complete steps to **Sending an Email Message**, but DO NOT press **Send**
- click **Insert** and select **File**
Using Microsoft Outlook

-or-

- click
- select **File**

The *Insert File* dialog box appears.

- type the file name and the qualifying path
- or-
- browse to find the file to attach
- click **Insert** to attach the file

The file's icon and name appears in the **Attach** field.

- click **Send**

2. **Receiving Attachments**

Follow steps in **Receiving an Email Message**.

If a message has an attachment, a paper clip icon 📄 appears to the right of the **Sender’s** column in the Message pane.

To view attachments:

- select the message in the Message pane

An icon appears to the left of the file name in the **Attachments: field**.

The following is a message with an attachment icon:

```
Test
Christopher Tompkins [CTompkins@pace.edu]
To: ctompkins@pace.edu
Attachments: 📄 day13.JPG (37 KB)
```
To view the attachment:

- double-click on the attachment icon

The *Opening Mail Attachment* dialog box appears.

The following options are available:

<table>
<thead>
<tr>
<th>Option</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>Launches the associated application. The file only opens if the application necessary is available on the computer.</td>
</tr>
<tr>
<td>Save it to disk</td>
<td>Opens the <strong>Save As</strong> window to specify the location to save the file.</td>
</tr>
</tbody>
</table>

- select an option
- click **OK**

### D. Creating IMAP Folders

Folders can be created to store email messages and to keep them organized. When IMAP is configured, folders can be created on the EMail server. The advantages for creating IMAP folders are as follows:

- folders created with IMAP are accessible from the Web interface.
- folders and email messages stored on the EMail server are backed up daily.

The following guidelines should be followed when creating folders via IMAP:

- folders should be created without spaces in the name.
- folders should be created at the top level (off of email.pace.edu), NOT within other folders.

**Note:** All University Faculty and Staff email accounts are allocated 30 megabytes of disk space on email.pace.edu. Faculty teaching online courses are allocated 50 megabytes.
1. Adding a Folder

To create a folder on the EMail server:

- point the cursor to email.pace.edu in the Folder List
- right-click email.pace.edu and select New Folder

The Create New Folder dialog box appears.

- type foldername

Where foldername is the name given to the new folder.

- click OK

Note: Do not use spaces in the foldername. Create folder without spaces or use an underscore in place of a space.

The folders created are displayed in the Folder List:

2. Deleting a Folder

- right-click the foldername in the Folder List
- select Delete foldername

Where foldername is the name of the folder that is to be deleted.

A message appears: “Are you sure you want to delete the “foldername” folder?”

- select Yes to delete
E. Creating Personal Folders

Folders can also be created within Outlook Today-Personal Folders. These folders are stored on the local PC and do not affect Email.pace.edu email quotas. Folders created within Outlook Today are not accessible from the Web interface.

1. Adding a Folder

To create a folder in Outlook Today-[Personal Folders]:

- point the cursor to Outlook Today-[Personal Folders] in the Folder List.
- right-click on Outlook Today-[Personal Folders] and select New Folder

The Create New Folder dialog box appears.

- type foldername

Where foldername is the name given to the new folder.

- click OK

The folders created are displayed in the Folder List:
Using Microsoft Outlook

2. Deleting a Folder

- right-click the *foldername* in the Folder List
- select **Delete foldername**

Where *foldername* is the name of the folder that is to be deleted.

A message appears: “Are you sure you want to delete the “*foldername*” folder?”

- select **Yes** to delete

V. ADDRESS BOOKS

*Address Books* simplify sending email. A name added is referred to as a **Contact**. The Address Book is used to add, delete, or modify contacts and distribution lists. A distribution list is an entry containing a selected group of contacts from the Address Book. Contacts must be added to the Address Book before creating a distribution list.

An Address Book is located on the hard drive of the local computer, not the WebMail server.

A. Using the Address Book

1. Adding a New Contact

- click **Tools** and select **Address Book**
- click **Add** and select **New Contact**
- click **OK**

The *New Contact* dialog box appears.
• type contact’s **full name** in the **Full Name** field
• type contact’s **email address** in the **Email** field
• press **Tab** key to display contact’s name and email address in the **Display as**: field

To save Contact:

• click **Save and Close** on the toolbar to save in the Contacts Folder and exit

**Note:** The General tab in the Contact dialog box is where required information (e.g., full name, email address) must be entered. The other fields viewed and the Detail tab is optional.

2. Opening the Contacts Folder

• click **Tools** and select **Address Book** to open **Contacts Folder**
• double-click a contact name to open properties

The **Address Book** dialog box appears.

![Address Book dialog box](image)

3. Deleting a Contact

• select a contact and click **X** to delete

4. Editing a Contact

• double-click on a contact in **Contacts Folder**
• modify the contact and click **Save and Close**

5. Creating a Distribution List

Add all contacts to the Contacts Folder before creating a distribution list.

• click **Tools** and select **Address Book**
• click **+** and select **New Distribution List**
• click **OK**
• type **distributionlistname** in the **Name**: field

Where **distributionlistname** is name given to the Distribution List.
• click **Select Members**

The *Select Members* dialog box appears.

![Select Members dialog box]

• type *name*

Where *name* is the name of the contact.

- or -

- select from list of contacts
- click **Members** button to add contact to **Add to distribution list**

Repeat the above process for every contact to add to the list.

• click **OK**
• click **Save and Close**

**Note:** To edit or delete a list, follow the steps in Editing a Card and Deleting a Card. A list can contain the names of other lists. To use a list when sending an email, use the list name in the **To:** field.

**VI. RULES**

All incoming messages are stored in the **Inbox** by default. Normally, a user goes through each message and moves it to a specific folder.

Rules automate the process of relocating incoming messages. A rule can be created to have mail from an individual or discussion group moved to a specific folder. An example of this is to set up a rule to move all incoming messages from the IMO-L list to the IMO folder. When retrieving mail, any messages received from IMO-L are moved automatically to the IMO folder.
A. Using Rules

1. Creating a Rule
   - click Tools select Rules and Alerts

The Rules and Alerts dialog box appears.

- click New Rules from E-mail Rules tab

Under Step 1: Select a template, there are pre-defined actions and conditions.

<table>
<thead>
<tr>
<th>Rule</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move new messages from someone to a folder</td>
<td>Messages from a certain person or distribution list are moved to a specified folder.</td>
</tr>
</tbody>
</table>
Rules

- Move messages with specific words in the subject to a folder
  Messages are moved to specific folders based on words found in the subject or body of the message.

- Move messages sent to a distribution list to a folder
  Message that are sent to a specified distribution list are moved to a designated folder.

- Delete a conversation
  Deletes messages based on specific words in the subject header.

- Flag messages from someone with a colored flag
  Flags a message from a specified sender with specific colors.

- Display mail from someone in the New Item Alert Window
  Message sent from certain people or distribution lists are placed under a New Item Alert window.

- Play a sound when I get messages from someone
  Plays a custom sound when messages are received from someone.

- Send an alert to my mobile device when I get messages from someone
  Sends alert to cell phone when messages are received from someone.

To set up a Rule to move a new message from a specific person or distribution list:

- click Start creating a rule from a template and select Move new message from someone to a folder

Under Step 2: Edit the rule description:

- click people or distribution list

Use the Rule Address dialog box to select the name or distribution list to apply to the rule.
• type the name to select
  -or-
• select a name from the Name list and click OK

Under Rule description the following appears: **Apply this rule after the message arrives from juser@pace.edu move it to the specified folder.**

Where **juser@pace.edu** is the name or distribution list chosen for the rule.

Once the name or distribution list is selected the designated folder is selected. Under Step 2: Edit the rule description:

• click specified

• select a folder and click OK
• click Finish
• click Apply to activate rule

2. **Editing a Rule**

• click Tools and select Rules and Alerts
• highlight the rule to edit
• click Change Rule
• select Edit Rule Settings

Make any necessary changes to the rule.

• click Finish to save the changes
• click Apply to activate rule

To close the Rules and Alerts dialog box:

• click OK
3. Deleting a Rule

- click **Tools** and select **Rules and Alerts**
- highlight the rule to delete and click **Delete**

A message appears: Delete rule “*rulename*”?

Where *rulename* is the name of the rule to be deleted.

- click **Yes**

To close the **Rules and Alerts** dialog box:

- click **OK**