

LESSON 2

Working with email

Outlook is the default email application used in most business enterprises and also popular choice for personal computer use. In this lesson, you will get started with Outlook email. You will learn about Outlook's supported email account types, get an overview of available Outlook message formats, set spelling checking and grammar checking options, add a default signature for new messages, and set the options to announce the arrival of new messages.

After studying this lesson, you will be able to:

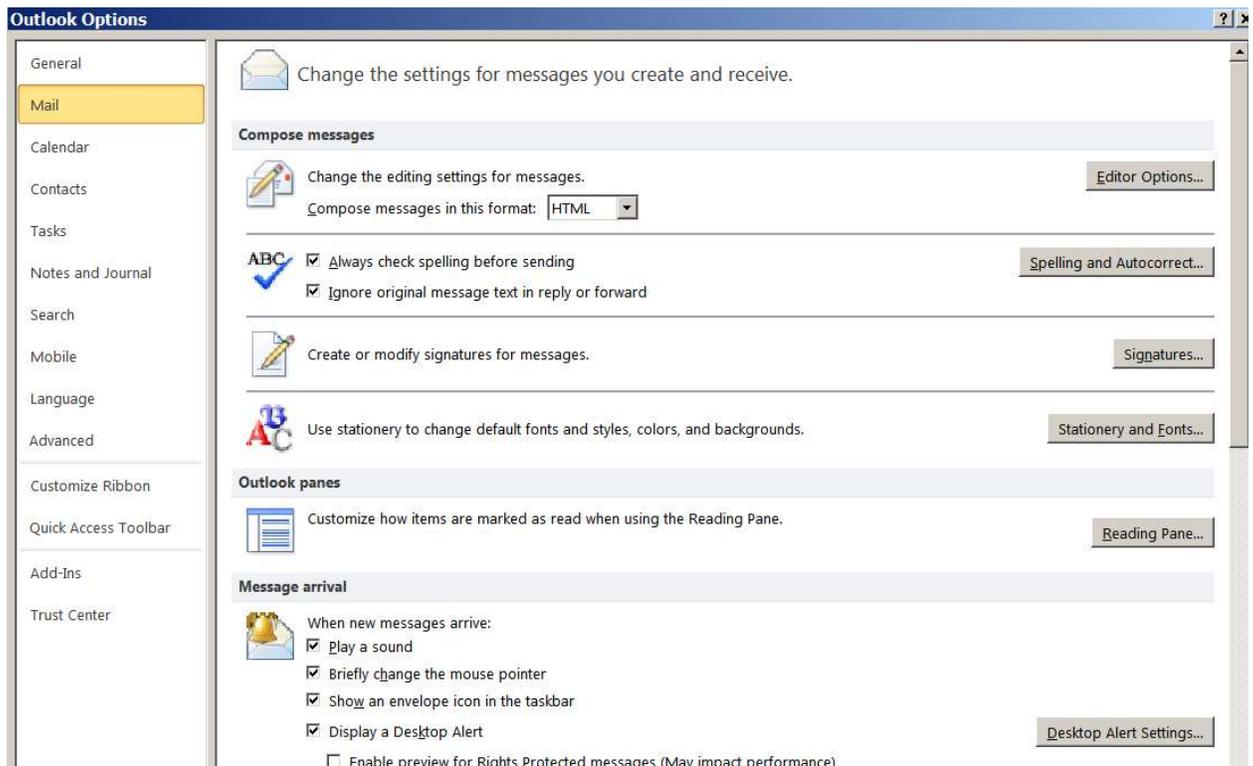
- View email account settings to determine your account type
- Access and set Outlook Mail options
- Customize Outlook spelling checking and grammar checking options
- Create a default Signature for your messages.
- Customize the Outlook Reading Pane to preserve the status of incoming messages
- Set notification options when new messages arrive

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Case Study: Working with email

Roberta Jackson has been hired as a legal assistant for Arthur Jones & Associates, a law firm specializing in Workers' Rights and Employment law. Roberta's responsibilities will include email outreach to new and current clients represented by the law firm as well as reception and transmission of legal documents from opposing Counsel. Microsoft Outlook is a powerful tool that supports a variety of message transport protocols and email account types to allow employees to communicate on the company's internal network and through mobile devices.

Roberta will be required to format her messages to comply with company IT specifications and create a company signature for her messages. The Microsoft Outlook email options will allow her to do this, as well as setting message notification options, message reply options, and message tracking options (recording receipt of outgoing email).



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[Fig Caption] The Outlook email Options set user preferences for sending and receiving messages.

Getting Started with Outlook Email

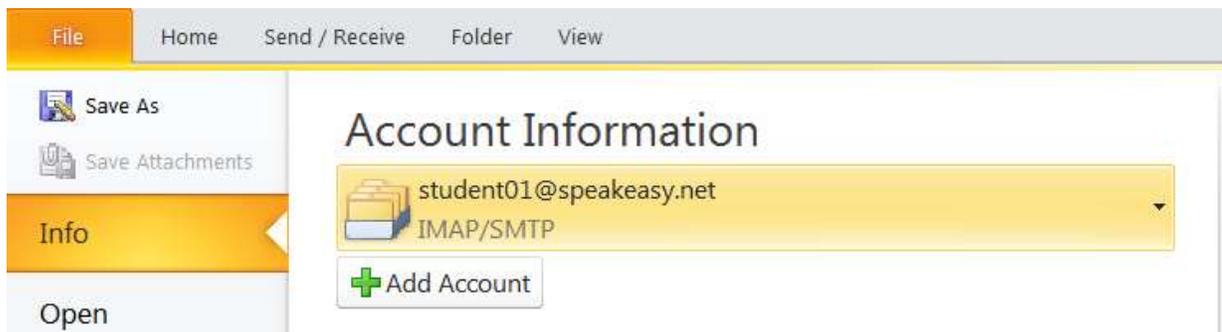
The Outlook mail client supports three basic account types for sending and receiving e-mail messages.

- **IMAP (Internet Messaging Access Protocol)** – This type of email account allows users to access a database of messages and folders stored on an external mail server. You can read and reply to messages without downloading them to your local computer. If you have Outlook accounts configured on multiple computers, you can access the messages and replies stored on the server by logging onto your email account from any workstation where Outlook is installed.
- **Microsoft Exchange** – This type of account is used to connect to a **Microsoft Exchange** mail server. Exchange email accounts support a number of advanced features, such as shared calendars and shared contacts (address books) that can follow you from computer to computer (or supported mobile devices).
- **POP3 (Post Office Protocol 3)** – This type of account is often used for personal email or in environments where a business outsources its email management to a third-party service provider. With this type of account, your incoming messages are typically downloaded to the computer where Outlook is installed and deleted from the mail server. (Some service providers permit you to configure Outlook to leave messages on the mail server after being downloaded, so that you can re-download them on multiple computers or a mobile device.) POP3 email accounts use the POP3 protocol to check for and download your messages. When you send messages from Outlook, it connects to the mail server through a protocol called **SMTP** (Simple Mail Transport Protocol),

Some email account configurations are hybrid. For instance, an email account of type **IMAP/SMTP** uses an IMAP server to receive and store incoming messages on the server and SMTP to send messages directly from your computer. **Windows Live Mail** is a special type of IMAP account that connects to designated mail servers through a Microsoft service, such as **Hotmail** or **Windows Live Essentials**.

Viewing your email account information

1. Click on the File menu in the mail Outlook window. By default, the **Info** option should be highlighted, displaying information about your email account type.



(02-02)

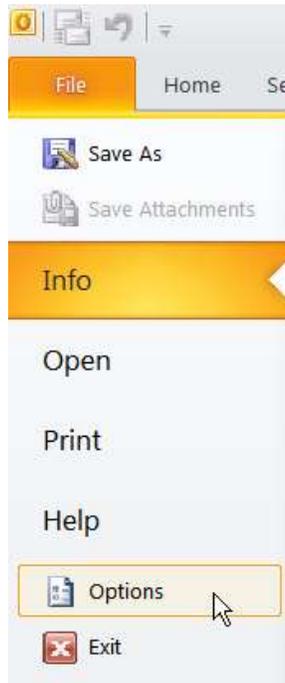
[Fig Caption] Roberta's email account type is IMAP/SMTP.

Setting Mail Options

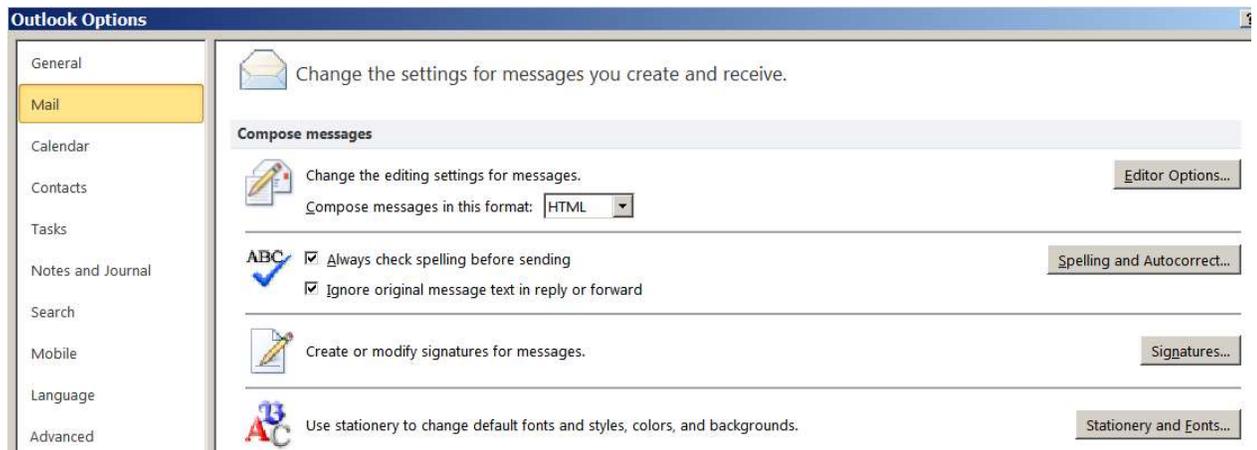
Outlook can be set up to read, send, and receive email messages in a number of ways. You can specify the format of incoming and outgoing messages, configure one or more signatures for your messages, set the type of alert you will receive when new messages arrive, and specify when to check for and send messages.

The Outlook Mail Options allow you to specify the format of incoming and outgoing messages, configure one or more signatures for your messages, set the type of alert you will receive when new messages arrive, and specify when to check for and send messages. The Outlook Mail Options also include a number of advanced features, such as the ability to request a notification when your messages are successfully delivered to a recipient's email server. This last option is particularly useful for work in the environment of a law firm.

To access the Outlook **Mail Options**, choose File→Options from the File Menu and select **Mail** in the **Outlook Options** window.



(02-03)



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Compose messages

The first section of the Outlook **Mail Options** screen sets defaults for composing messages. You can choose the display format for new messages, enable checking of spelling and grammar, create a signature for your messages, and customize stationery used as a message background. (Stationery is applied when messages are composed in the HTML format.)

Messages sent and received in Outlook can be formatted in three ways: Plain Text, HTML, and Rich Text Format (RTF):

- Messages composed in Plain Text contain only alphanumeric text data— with no document styling information or embedded graphics.
- Messages composed in HTML may contain many of the same elements found in webpages: formatted text, multiple fonts, URL links, embedded pictures, and customized background graphics (referred to as stationery).
- The Rich Text Format (RTF) is similar to HTML, but designed to keep the look and feel of a mail message when it is opened in (or pasted into) non-Microsoft word processors that run under a variety of operating systems.

The policy at Arthur Jones & Associates is to use the HTML format as the default for company correspondence. HTML messages are popular in sales correspondence and in other business messages where formatted text and graphics can be used to give message content a “friendly” appearance.

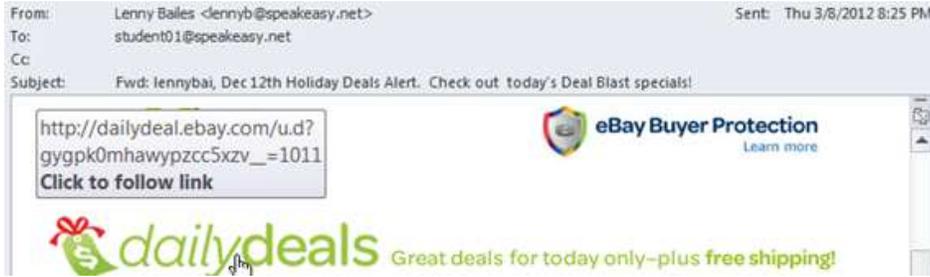
The Plain Text format is often used in environments where mail will be exchanged with users of non-Outlook mail clients. Plain Text is frequently used for messaging in IT environments, or in other situations where Internet bandwidth and internal security are of prime importance.

In her job responsibilities, Roberta will occasionally be asked to send bulk messages composed in Plain Text. As we will see later in this chapter, Outlook permits the message format to be temporarily switched from the default to another format in order to compose individual messages on a one-time basis.

Choose the Outlook Message Format

2. On the Outlook **Email Options** screen, set **Compose messages in this format** to **HTML**.

NOTE! Messages originally composed in the HTML format do not display well if subsequently re-sent in the Plain Text format.



(02-05)



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[Fig Caption] The same Outlook mail message is shown here, delivered in both HTML and Plain Text formats.

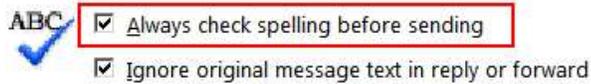
QUICK REFERENCE: Choosing Outlook Message Format

Message Format	When To Use
Plain Text	Use in environments where mail will be exchanged with users of non-Outlook mail clients or when IT security is a primary concern
HTML	Use in environments where mail will be exchanged primarily with other Outlook users.
Rich Text Format	Use to preserve formatting and embedded graphics in non-Microsoft messaging environments.

ABC (Check Spelling and Grammar)

Spelling checking can be invoked *manually* from within an Outlook message window at any time. (Grammar checking is not automatically enabled. See page 9 of this lesson to learn how to switch it on.)

To enable *automatic* spelling checking before sending a message, place a checkmark next to **Always check spelling before sending** in the **ABC**.section of the **Mail Options** screen

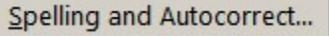


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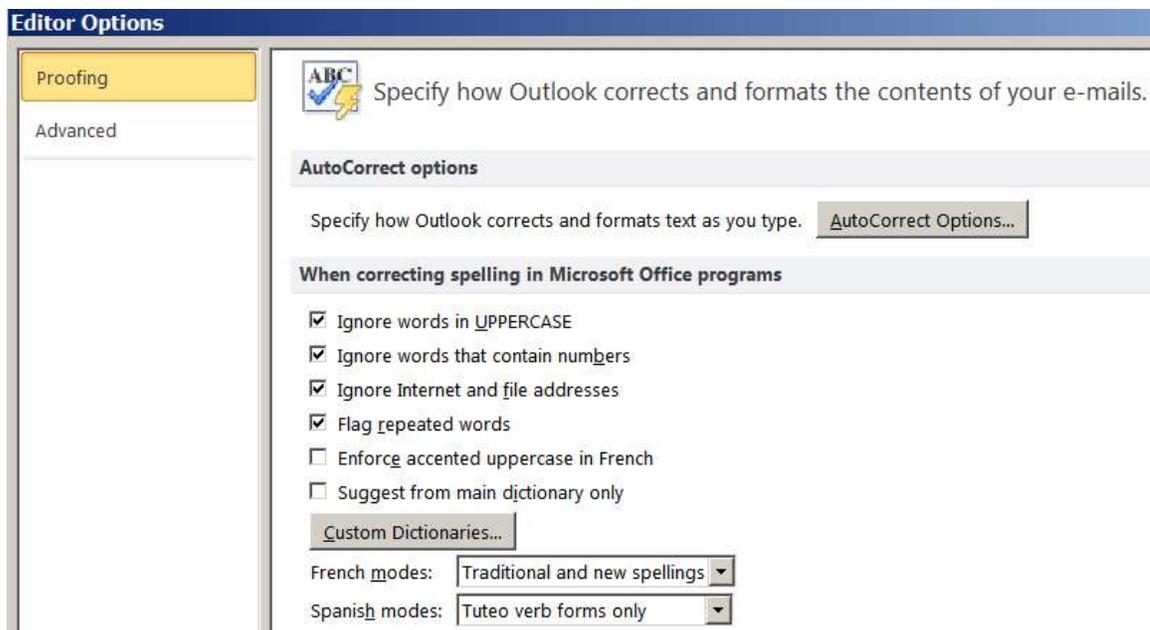
[Fig Caption] Enable automatic spelling check before sending a message.

By default, the quoted text in a message reply or in a forwarded message will not be checked.)

In addition to checking spelling in an entire message, Outlook includes the Microsoft Office **Autocorrect** feature. Enabled by default, **Autocorrect** monitors message text as you type it into the message composition window. Common spelling and punctuation errors are corrected on-the-fly. For instance, if you type two initial capital letters into the first word of a sentence, **AutoCorrect** will convert the second letter in the word to lower case. For this feature to work, the words you enter must be listed in the main Outlook dictionary. (Unrecognized words can be added to a custom dictionary. Their spelling will subsequently be corrected to match the entry that you add to the dictionary.)

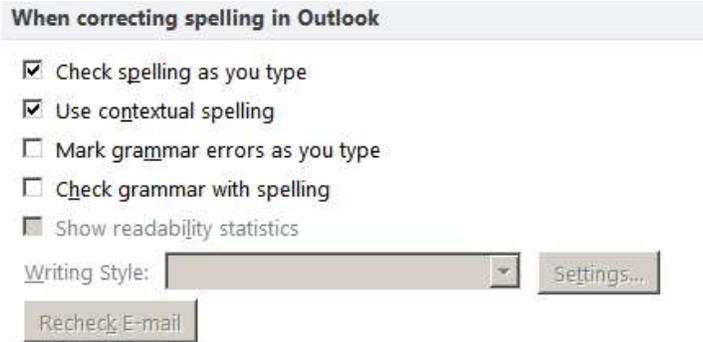
Spelling checking and grammar checking options in Outlook messages are customized by clicking **Spelling and Autocorrect**  (999a) on the right side of the **Mail Options** window. The **Editor Options** window will open.

The options under **When correcting spelling in Microsoft Office programs** set the defaults used when you manually invoke spelling checking and grammar checking in a message.



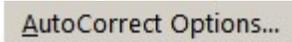
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Additional options for spelling checking and grammar checking are available under **When correcting spelling in Outlook**. Note that, by default, grammar checking is not enabled.

**(02-09)****HANDS-ON 1-1****Set Outlook Spelling and Grammar Checking defaults**

In this exercise, you will use Outlook's Spelling and Grammar Checking options to customize the Autocorrect feature and enable Grammar Checking.

Set Outlook Spelling and Grammar Checking Defaults

1. Click **AutoCorrect Options**  (999b) on the **Editor Options** screen to customize the way that Outlook corrects spelling as you type.
2. In the **Autocorrect** window, uncheck **Correct accidental usage of cAPS LOCK key**.

FROM THE KEYBOARD

[Alt]+[L] to uncheck this option

[Enter] to close the Autocorrect window.

3. On the **Editor Options** screen, checkmark **Mark grammar errors as you type**, under **When correcting spelling in Outlook**. Outlook will now underline grammatical errors on the screen as text is entered into a message composition window.
4. Checkmark **Check grammar with spelling** to flag grammatical errors whenever you manually invoke the Spelling Checker.
5. Click **OK** on the **Editor Options** screen to return to the **Mail Options** screen.

Signatures

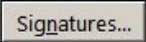
Roberta will need to create a company signature for her email messages. An Outlook signature can be included in messages that use any of the three message formats. A signature created for the HTML or Rich Text format can include URL links and/or an embedded graphic, such as a company logo.

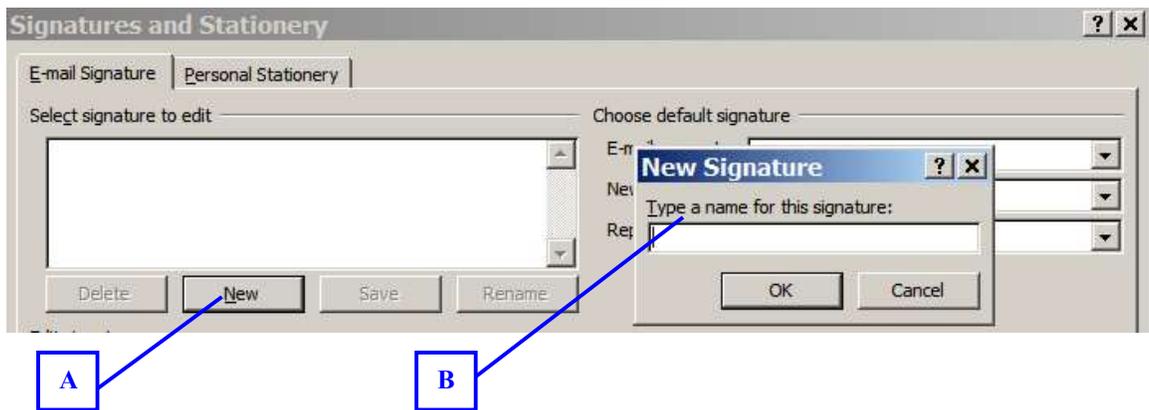
HANDS-ON 1-2

Create an HTML signature

In this exercise, you will create a signature for Roberta's new messages and message replies. Then you will add a URL link to the name of her company in the last line of the signature.

Create an HTML signature

1. On the **Outlook Options** screen, under **Mail**, click **Signatures**  to the right of **Create or modify signatures for messages**.
2. In The **Signatures and Stationery** window, click **New**, enter a name for the signature and click **OK**.



(02-10)

A Click New

B Enter "Roberta Jackson" in the **New Signature** box and click **OK**.

3. In the **Signatures and Stationery** window, under **Edit Signature**, enter the signature information shown in the figure below. Use the Mouse or Cursor keys to highlight the name of the law firm in the last line. (Don't click **OK**, yet. We're going to add a URL link for the last line of the Sig.)



(02-11)

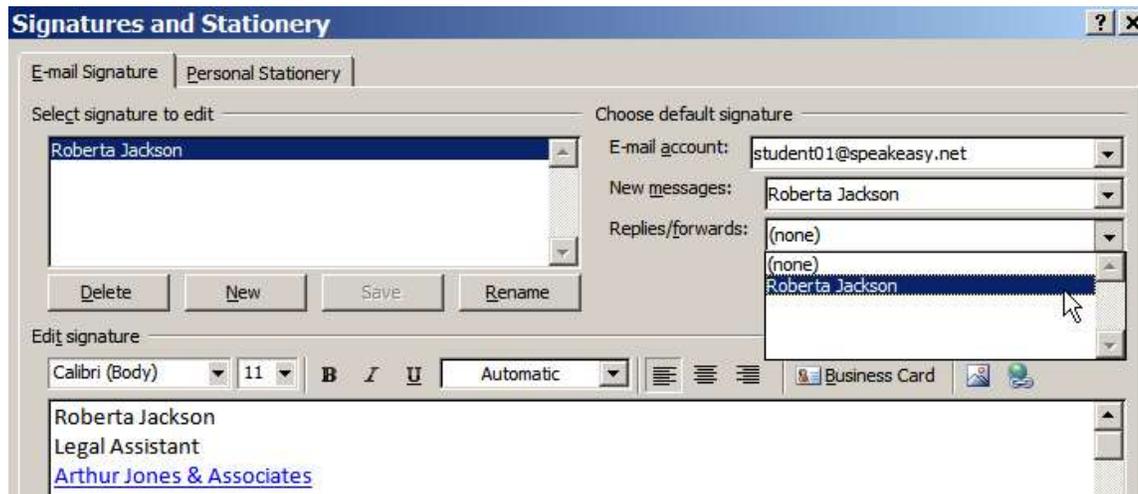
4. Click on **Insert Links**  (168-10) at the upper right of the **Edit Signature** window. The **Insert Hyperlink** window opens.
5. Next to **Address:** in the **Insert Hyperlink** window, enter the URL for the law firm: <http://www.ajones.com>, then click **OK**.



(02-12)

The signature should now display a blue URL link in the last line.

6. In the **Signatures & Stationery** window, under **Choose default signature**, set **New messages** and **Replies/forwards** to use the new Roberta Jackson signature.



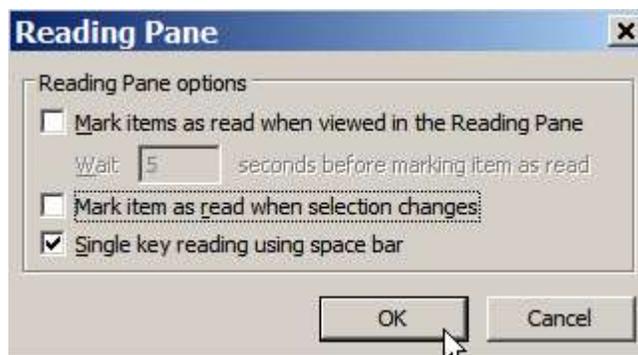
(02-13)

7. Click **OK** to close the **Signatures & Stationery** window.

Outlook Panes

The Reading Pane allows you to preview Outlook items without actually opening them. The Outlook Panes section of the Mail Options allows you to specify how messages will be marked when you are using the Reading Pane. The default settings cause a message to be marked as “Read” as soon as you select another message in the list to preview. This default can be changed by clicking the **Reading Pane** **Reading Pane...** (999d) button.

Some people prefer to use the read/unread status of a message as a reminder of whether they need to take action on its contents. To keep a message marked unread until it is opened, uncheck **Mark items as read when viewed in the Reading Pane** and uncheck **Mark item as read when selection changes**, Then click **OK** to close the **Reading Pane** window.



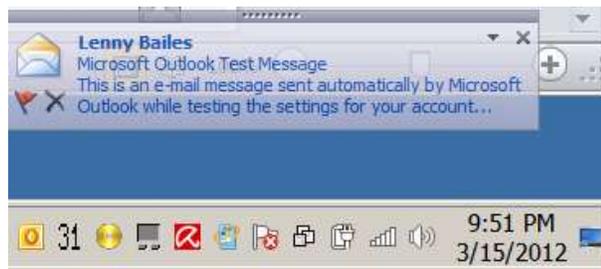
(02-14)

Message arrival

The **Message arrival** section of the **Mail Options** screen allows you to set the way you will be notified when new messages arrive in your Outlook Inbox. The available notification options (which can be set to run concurrently) are:

- Play a sound
- Briefly change the mouse pointer
- Show an envelope icon in the taskbar
- Display a Desktop Alert.

A Desktop Alert is a notification that appears on your desktop when you receive a new email message, meeting request, or task request. By default, this option is turned on.



(02-15)

The information displayed in the Alert will vary, depending upon the type of item that is received in your Inbox.

NOTE! The Desktop Alert notification option is not automatically available in IMAP email accounts. A special procedure must be used to enable Desktop Alerts with IMAP accounts. See <http://social.technet.microsoft.com/Forums/lv/outlook/thread/8491b9d2-afd0-424b-a2c2-65599d56c017s> for details.

PRODUCTION NOTE: Next page starts Concepts Review

Concept Review

True/False Questions

1. Microsoft Outlook supports three basic types of email account.
2. Outlook always downloads incoming messages to your local computer.
3. Plain Text messages can contain personalized signatures.
4. Although Outlook can check spelling, it does not include a built-in grammar checker.
5. Outlook does not permit you to set Desktop Message Alerts to be displayed on the screen when using an IMAP email account.

Multiple Choice Questions

1. The Rich Text Format (RTF) for composing Outlook mail messages is generally used when:
 - a. Most message recipients will also be running Microsoft Outlook
 - b. The available network connection is low speed, and the IT department wishes to avoid consuming bandwidth with messages that contain Background Stationery or embedded graphics.
 - c. A large number of projected messages recipients may be using non-Microsoft operating systems and mail clients.
 - d. Windows system administrators don't like reading messages that contain formatted text or embedded graphics.
2. Generally, when Outlook is first opened on a computer by a new user _____.
 - a. the program defaults enable both spelling checking and grammar checking.
 - b. the defaults enable spelling checking, but grammar checking is switched off.
 - c. both spelling checking and grammar checking are disabled, by default.
 - d. Spelling checking is enabled, but the **Autocorrect** feature is switched off.
3. By default, when you create a **Signature** for your email messages _____
 - a. The signature will automatically be included in new messages and message replies.
 - b. The signature will not be included in message replies unless you set this option in the **Signatures and Stationery** window.
 - c. Outlook will automatically format the signature to appear right-justified in messages with bold text.
 - d. Outlook will automatically prompt you to add a URL link for the signature.
4. When new messages arrive in your Inbox, Outlook can be set to _____
 - a. play a sound.
 - b. show an envelope icon in the taskbar.

- c. display a Desktop Alert.
 - d. all of the above.
-

Critical Thinking

CRITICAL THINKING 1-1 **Choose Outlook message format and customize message arrival notification options**

Robert Smith has been hired as an engineer in the Quality Assurance department of Wilco Engineering. Wilco is an energy consulting company that inspects solar, nuclear, and oil-burning electricity generators. Wilco employees use Outlook 2010 for company email correspondence; however, a number of Wilco's clients are non-Microsoft shops that use Macintosh computers. Other Wilco clients use Open Office under Linux to create engineering documents and conduct office business.

Because Robert will occasionally be working with engineering specifications and wireframe diagrams on his desktop, he does not wish to be distracted by Outlook Desktop Alerts when new messages arrive.

1. Choose an appropriate Outlook message format for Robert to compose emails for multiple operating system platforms and mail clients.
2. Set Outlook **Message arrival** options so that Robert will be notified when new messages arrive without any visual display distractions on his desktop screen.

CRITICAL THINKING 1-2 **Customize Outlook Spelling and Grammar Checking options**

Robert wishes to customize Outlook's spelling and grammar checking options to match his personal style of correspondence. He will be entering company names spelled out in upper case format in his messages. He would like the Outlook spelling checker to flag misspellings in these names after entering them into a custom dictionary.

Robert would also like to be able to type the names of companies spelled out in upper case format without the second letter in the name automatically being converted to lower case by **Autocorrect**.

Finally, Robert would like Outlook to find grammatical errors in his messages when he checks spelling, but not flag grammar errors in the message window as he is typing.

1. Configure the **Spelling checker** so that spelling is checked for UPPERCASE words in the main Outlook dictionary as well as in custom dictionaries.

2. Disable the **Autocorrect** option that automatically corrects “Two Initial capital letters” in a word by changing the second letter to lower case.
3. Configure the **Grammar checker** so that grammar is checked when the **Spelling checker** is invoked, but grammar errors are not flagged as text is typed in a message.

CRITICAL THINKING 1-3**Create a signature for new emails with company URL link**

When Robert reviews his email, he wishes to be able to copy and paste entire conversations without the constant intrusion of signature lines. Consequently, he would like to create an Outlook signature that will appear only on the new messages that he sends to start a discussion, not on replies to other messages.

1. Create a signature that Robert can use for new messages, only. The signature should include a URL link to Wilco’s website. The signature will show his name on the first line, his title on the second line, and an embedded link to the company’s website on the third line (rather than appending the URL after the company name, as shown below).

Robert Smith
QA Engineer
Wilco Engineering (<http://www.wilcoengineering.com>)

The signature should be formatted in bold text and configured to appear on new messages that he composes—but not on message replies or on forwarded messages.