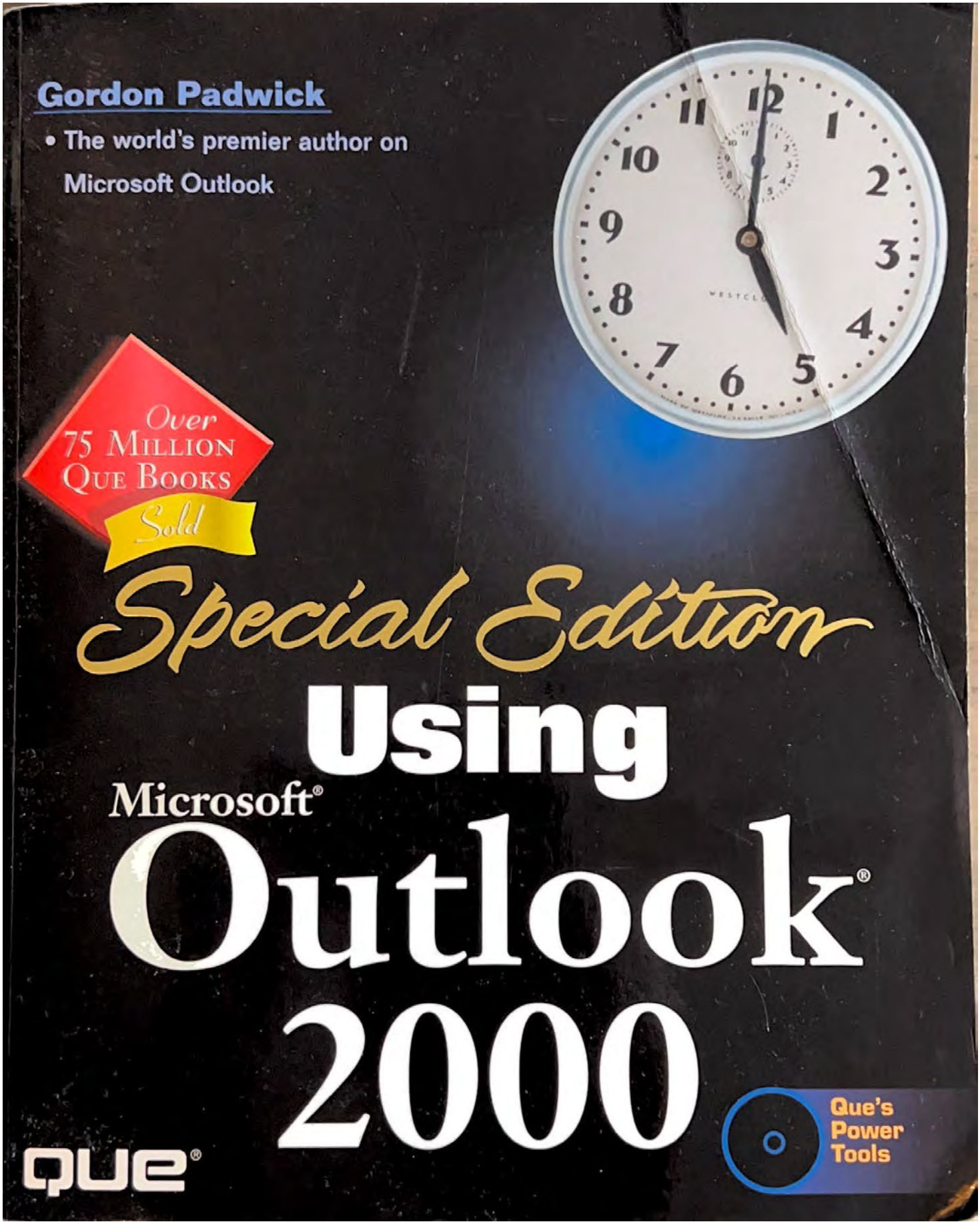

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SPECIAL EDITION USING MICROSOFT® OUTLOOK® 2000

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CREATING A MESSAGE

The following information assumes you're using Outlook's native editor and have selected HTML as your default message format, as described previously in this chapter.

SENDING A MESSAGE FROM WORD

In Word, or another Office application, you can create a document and send that document to an e-mail recipient. Here's how.

To create a message in Word and send it by e-mail:

1. Open Word and create the message.
2. Choose File, move the pointer onto Send To, and choose Mail Recipient. The Document form expands to show To, Cc, and Subject boxes at the top.
3. Choose To to open the Select Names dialog box, which displays a list of your contacts.
4. Select one or more people to whom you want to send the message, choose To-> to move the name or names into the Message Recipients list, then choose OK to return to the Document form in which the recipients names are displayed.
5. If appropriate, choose Cc to select the names of people to whom you want to copy the message.
6. Enter a subject of the message in the Subject box.
7. Choose Send a Copy in the form's toolbar to send the document as a message. When you do that, the document is placed in Outlook's Outbox, ready to be sent. The document is actually sent the next time you send messages from Outlook to your mail server.

Note

The preceding procedure referred specifically sending a message from Word. You can use similar steps to send messages from other Office applications.

OPENING THE MESSAGE FORM

To create a message, start by choosing Inbox in the Outlook Bar to display the Inbox Information viewer. Choose the New button at the left end of the Standard toolbar. Outlook displays a message form similar to that shown in Figure 6.18. Notice that the form's title bar reminds you which message format you have chosen as the default.

If you've chosen WordMail as your default editor or, as explained in the preceding tip, chosen WordMail for the current message, Outlook displays the message form shown previously in Figure 6.17.

CHOOSING INTERNATIONAL OPTIONS

Something new in Outlook 2000 is the importance of International Options. In the Mail Format tab of the Options dialog box, shown previously in Figure 6.16, choose International Options to display the dialog box shown in Figure 6.19.

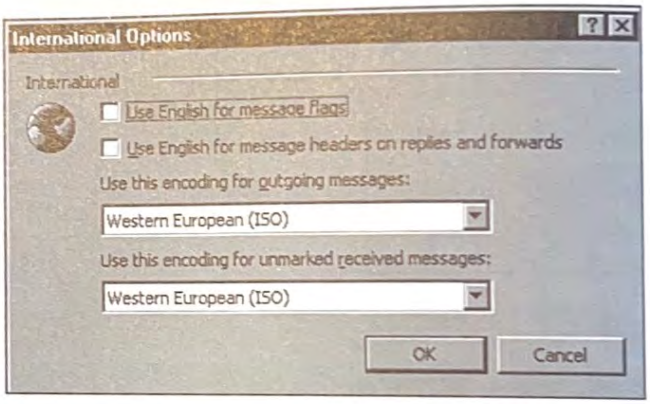


Figure 6.19
By default, Western European (ISO) encoding is selected for outgoing and unmarked received messages.

Note

"Encoding" refers to the relationship between the digital representations of characters in a message (or other file) and the way those characters appear onscreen or in print, and also the digital codes that are recorded by pressing keys on your keyboard. Encoding is controlled in the Windows environment by code pages, each of which contains a table of characters with a numeric index assigned to each character.

Normally, accept the defaults in this dialog box. You can open the drop-down Use This Encoding for Outgoing Messages and Use This Encoding the Unmarked Received Messages lists and select encoding other than the default.

Note

If you select encoding other than Western European (ISO), people who receive your messages using Outlook 97 or Outlook 98 will not be able to send replies to your messages.

If you use a non-English version of Outlook, you can check:

- Use English for Message Flags. After you do so, such flags as High Importance and Flag for Follow-up appear in English.
- Use English for Message Headers on Replies and Forwards. After you do so, the headers of message replies and forwarded messages use English for field name labels such as From, To, Sent, and Subject.

CHANGING THE MESSAGE FORMAT

If you want to use a message format other than your default, choose Format in the Message form's menu bar to display the menu shown in Figure 6.20. You can select an alternative format either before or after you've entered the message text.

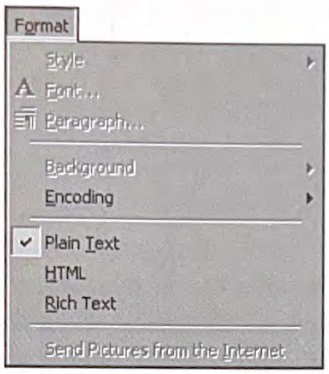


Figure 6.20
The Format menu contains your default format, Plain Text in this case, which is checked, and also HTML and Rich Text.

Select HTML or Rich Text if you want to change to either of those formats. The message format name in the form's title bar changes to show the new format.

After you've switched to HTML or Rich Text, or if you had chosen HTML or Rich Text as your default format, you can change to Plain Text. To do so, choose Format in the form's menu bar to see a menu that contains Plain Text as well as HTML or Rich Text. Choose Plain Text to switch to that format. When you do so, you'll see a message warning you about losing formatting. Choose Yes if you want to continue.

Changing from HTML to Rich Text, or vice versa, is a two step process. First change from HTML (or Rich Text) to Plain Text. With the Plain Text format selected, choose Format in form's menu bar to display a menu in which you can select HTML or Rich Text.

Note

When you change the message format in this way, the change affects only the current message. Subsequent messages use the default format. The only place to change the default format is to choose Tools, Options and select the Mail Format tab.

The remainder of this section assumes you're using the HTML message format, even though I recommend using Plain Text for most purposes. This is so that I can describe several capabilities offered by HTML that aren't available in Plain Text. You'll find minor differences if you're using the Plain Text or Rich Text formats.

You can also use the Message form's Format menu to change encoding from the default encoding. Move the pointer onto Encoding and select from a list of available encoding formats. This is something you normally shouldn't have to do and, in fact, shouldn't do unless you completely understand the implications.

Oracle Exhibit 1023
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ADDRESSING THE MESSAGE

The blank message form shown previously in Figure 6.18 contains the message header consisting of the To, Cc, and Subject boxes. If you see only the To box, choose View, Message Header in the form's menu bar to display the complete message header.

Figure 6.21 shows a typical message form with recipient addresses, subject, and message text entered.

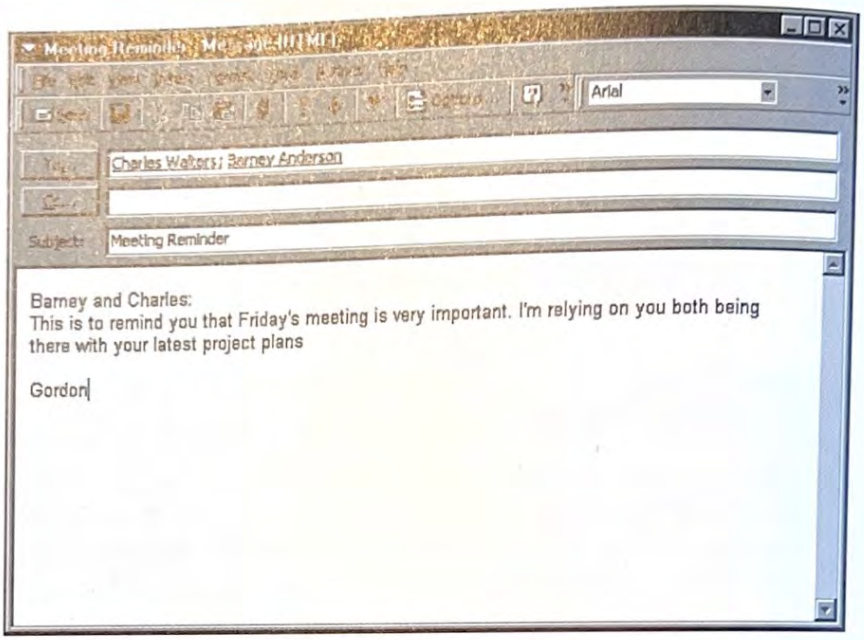


Figure 6.21
This message form is ready to send.

To address the message, enter one or more recipient e-mail addresses in the To box. You can do so in several ways, each of which is convenient in specific circumstances.

→ **See** "Managing Contacts," **p. 297**.

Note

The following sections make frequent reference to your Contact list. To use the information in these sections, you must already have Contact entries in your address book.

MANUALLY ENTERING AN E-MAIL ADDRESS

If you know recipients' e-mail addresses, you can enter those addresses in the To box, separating one address from the next with a semicolon. After you've completed entering addresses, press Tab to move to the next box. At that time, Outlook attempts to verify the e-mail addresses you entered by comparing them with information in your address book, a process referred to as *resolving* addresses.

Note

The term *address book* in the preceding and subsequent paragraphs refers to your Contacts folder and, possibly, to other places where you keep addresses. Refer to Chapter 9, "Managing Contacts," for detailed information about this.

When Outlook finds an address you've entered in your address book, Outlook replaces the address with the person's name and underlines that name. If Outlook doesn't find the e-mail address in your address book, but does recognize the address as being in acceptable Internet format, Outlook simply underlines the address you entered. If Outlook doesn't recognize the address as being in Internet format, Outlook leaves the name as you entered it without underlining it.

If you enter several recipients' e-mail addresses, some of them may be in your address book, but not others. If that's the case, the To box contains a mixture of e-mail addresses and people's names.

ENTERING RECIPIENTS' NAMES

If you're sending a message to recipients whose names and e-mail addresses are in your address book, you can enter names instead of e-mail addresses. After you enter one or more names, separating one from the next with a semicolon, press Tab to move to the Cc box. At that time, Outlook looks for the names in your address book. If Outlook finds a name, Outlook underlines the name to indicate that it is acceptable.

To be sure the e-mail address is correct, right-click the person's name to display a context menu. Choose Properties in the context menu to display the form shown in Figure 6.22.

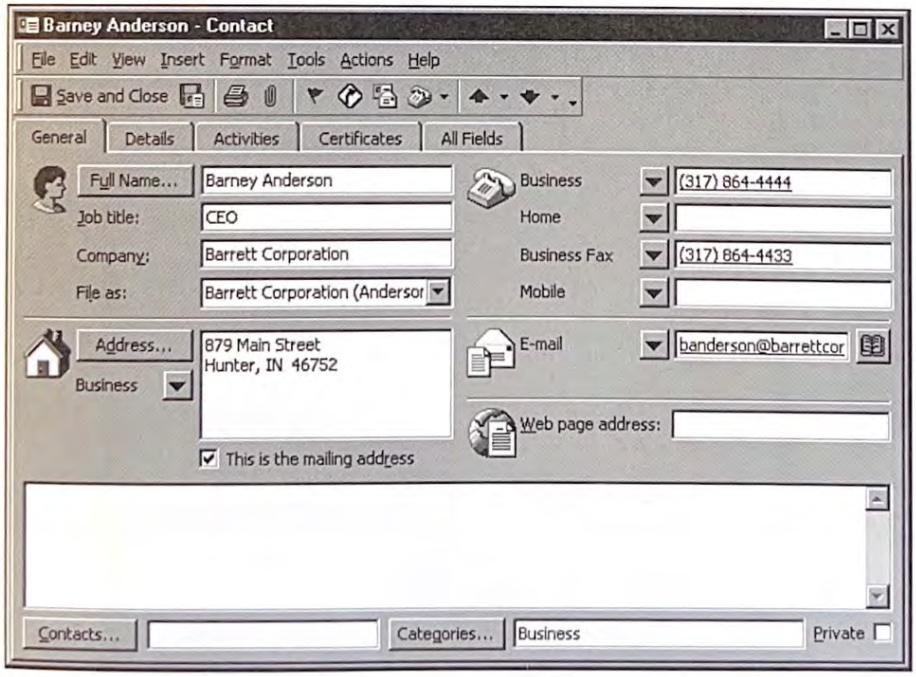


Figure 6.22
This form displays the information about a contact that's saved as a Contact item in your Contacts folder.

Caution

The fact that Outlook underlines a name in the To box on the Message form indicates only that the name exists in your address book, not that the address book contains an e-mail address for the contact. That's why you should always check Properties to make sure an e-mail address is available.

ENTERING PARTIAL RECIPIENT NAMES

Instead of entering the complete names of recipients, you can enter partial names. For example, you could enter Frank and press Tab. Outlook searches your address book and, if it finds only one Frank, it displays that Frank's full name and underlines it. You should check the name's properties, as previously described, to ensure that Outlook has chosen the correct e-mail address.

If there are two or more Franks in your address book and you haven't previously sent e-mail to either of them, Outlook places a squiggly red line under the name you entered to indicate that you have to make a decision. Right-click the name you entered and Outlook displays a list of all the Franks in your address book. Select the one to whom you want to send this message.

If there are two or more Franks in your address book and you have previously sent e-mail to any of them, Outlook assumes you want to send e-mail to the most recent Frank address you used and displays that person's name in the To box. To select a different Frank, right-click the name in the To box and then select the name you want to use.

SELECTING NAMES IN YOUR ADDRESS BOOK

Instead of entering recipients' names or e-mail addresses, you can select these names from those in your Contacts folder or other list of contacts. In the Message form, choose To to display the contacts in one of your address books, as shown in Figure 6.23.

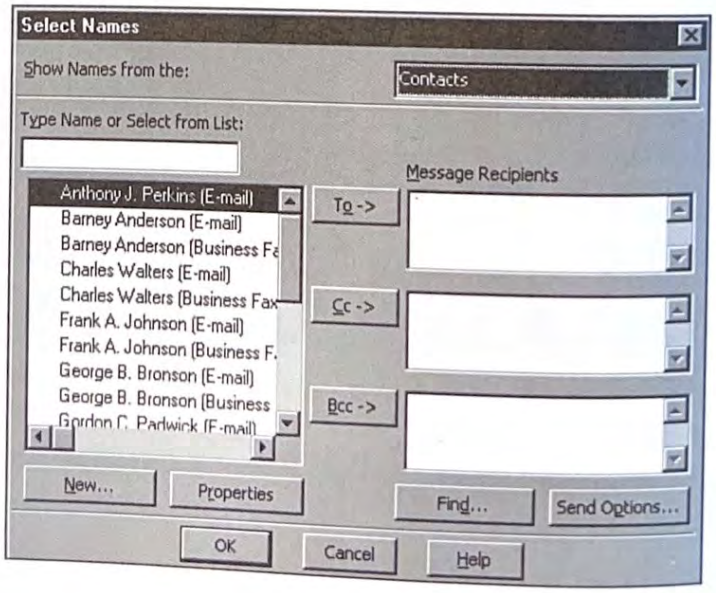


Figure 6.23
The Select Names dialog box shows the names in one of your address books. These names are listed at the left side of the dialog box. The name of the address book is shown in the Show Names from The box.

If you have more than one address book, you can open the drop-down Show Names from The box to see a list of available address books, as shown in Figure 6.24.

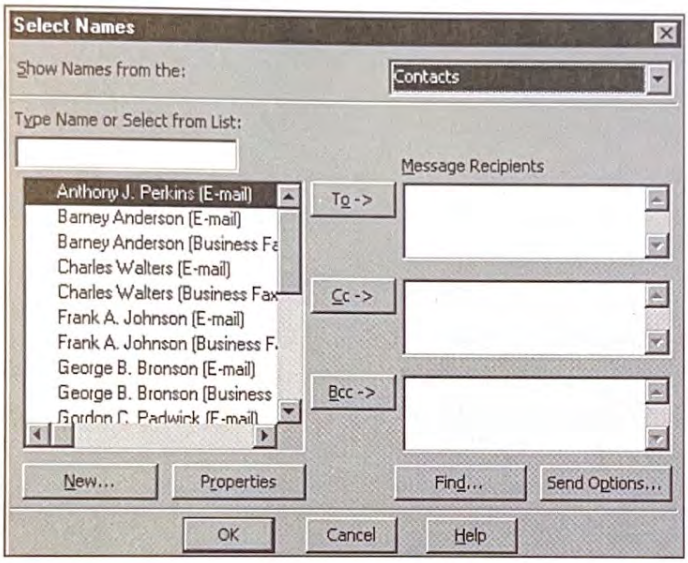


Figure 6.24
In this example, the Contacts address book is available as an Outlook Address Book.

→ For detailed information about address books, **see** "Using a Personal Address Book," **p. 336**.

Select any address book in the drop-down list. After you do so, Outlook displays the names in that address book in the Select Names dialog box.

You can use three methods to select recipients from the names in the selected address book.

One method is to scroll down the list of names, select the name of one recipient, and choose To-> to copy that name into the Message Recipients list at the right side of the dialog box. Then choose OK to return to the Message form in which the name you selected is displayed in the To box.

Tip #36 from

To designate more than one recipient, select the first, then hold down Ctrl while you select others. To select recipient names that are listed consecutively, select the first name, then hold down Shift while you select the last name.

Alternatively, you can repeatedly choose To on the message form to add names one at a time.

Instead of scrolling through the list, you can enter a person's name (or partial name) in the Type Name or Select from List box. When you do that, Outlook finds the first name in the list that matches what you enter.

A third alternative is to choose Find. When you do that, Outlook displays a dialog box in which you can enter a contact's name, e-mail address, address, or phone number, and then press Find. Outlook then finds the contact.

Tip #37 from

Many names listed in the Select Names dialog box occur more than once. In fact, there's a separate entry for each e-mail address and fax number saved in each contact item. To be sure you select the correct name, use the horizontal scroll bar at the bottom of the list of names to scroll to the right. That way, you'll be able to see the e-mail addresses associated with the names. You can also select a name, then choose Properties to see all the information about a contact.

After you've selected recipients, choose OK to return to the Message dialog box that now shows recipients' names in the To box.

SENDING CARBON COPIES AND BLIND CARBON COPIES OF MESSAGES

A traditional business practice is to send messages *to* people whom you expect to take some action as a result of the message, and to send *carbon copies* (cc) to people who should know about the message but aren't expected to take any action as a result of it. When you use Outlook, everyone whose name is on the To and Cc lists sees everybody else's name on the messages they receive, so all recipients know who sees the message.

Sometimes you want to send a copy of a message to someone without other recipients knowing. That's when you send a *blind carbon copy* (bcc). The recipients of blind carbon copies see all the names on the To and Cc lists; the people on the To and Cc lists don't see the names on the Bcc list.

Tip #38 from

Blind carbon copy is also useful when you want to send a message to a mailing list without revealing the names of everyone on the list to all recipients.

→ For information about creating a distribution list, **see** "Creating a Distribution List," **p. 333**.

The header of the Outlook Message form contains a Cc box. You can add names and e-mail addresses into it in the same way you add names and addresses to the To box. One minor difference is that if you select names from those listed in your Address Book, you choose Cc-> to copy names into the appropriate Message Recipients list.

The Message form's default header doesn't contain a Bcc box. To make this box available, choose View, Bcc Field in the form's menu bar. After you've done that, you can enter names and addresses into that field in the same way that you add them into the To field.

Note

If you use the Select Names dialog box to copy names into the Bcc list, Outlook automatically expands the Message form's header to show the Bcc box.

ENTERING A MESSAGE SUBJECT

To enter a subject for a message, move the insertion point into the Subject box, type the text of the subject, then press Tab to move the insertion point into the message box. As

CHAPTER 7

SENDING AND RECEIVING FAXES WITH CORPORATE/WORKGROUP OUTLOOK

In this chapter

by Gordon Padwick

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USING OUTLOOK TO SEND AND RECEIVE FAXES

C/W

You can use Outlook to send and receive faxes providing you have a fax modem and access to a phone line. Instead of creating a fax in a word processor, printing it, then lining up at the fax machine to send it, you can use Outlook to create and send a fax directly from your computer. If you have a phone number to which people can send you faxes, those faxes arrive on your computer in much the same way as e-mail arrives.

There are several ways Outlook can be used to send and receive faxes:

- With *C/W Outlook (page 54)* running under Windows 95 or Windows 98, you can use Microsoft Fax (supplied with Windows 95 and Windows 98). Microsoft Fax is covered in this chapter.

Note

Microsoft Fax is also referred to in various places as "Microsoft at Work Fax" and as "Microsoft At Work PC Fax."

- With *IMO Outlook (page 53)* running under Windows 95, Windows 98, or Windows NT, you can use WinFax Starter Edition (WinFax SE). WinFax SE is licensed from Symantec by Microsoft and is supplied with Outlook 2000.

→ If you are using IMO Outlook to send faxes, **see** "Sending and Receiving Faxes with Internet Mail Only Outlook," **p. 127**.

- You can use various add-on fax programs available from other companies. One of these is WinFax Pro from Symantec. WinFax Pro contains many facilities that aren't in Microsoft Fax or WinFax SE.

SETTING UP MICROSOFT FAX

You must add the Microsoft Fax information service to your profile and set its properties. You may also have to add files to and modify some files in your Windows environment.

MAKING MICROSOFT FAX AVAILABLE UNDER WINDOWS 98

The files necessary to support Microsoft Fax aren't installed with Windows 98 or Office 2000. However, you can separately install them from the Windows 98 CD-ROM. The files are also available from Microsoft's Office 2000 Update Web site.

Tip #46 from

Gordon Padwick

Make sure you have the latest copy of the Microsoft Fax files installed on your computer. If you previously used Microsoft Fax with Outlook 97, you'll experience some incompatibility problems if you attempt to use its file with Outlook 2000. You may experience the same problem if you previously used Microsoft Fax with Outlook 98.

To make Microsoft Fax available under Windows 98:

1. Insert the Windows 98 CD-ROM into your drive. After a few seconds, you'll see the start-up screen.
2. Choose Browse This CD to display the top-level folders on the CD.
3. Navigate to the folder Tools\OldWin95\Message\US. That folder contains three files, one of which is Awfax.exe.
4. Double-click Awfax.exe. A message appears saying "This will install Microsoft Fax on your system." It also says that one of these programs must be installed: Windows Messaging, Microsoft Exchange Client, or Microsoft Outlook 97. Don't worry about the "Outlook 97" part; Outlook 2000 is okay, too. Choose Yes to continue. You'll see several files being installed and then a message saying that you must restart your computer. Choose Yes.

After your computer restarts and you start Outlook, you're almost ready to install the Microsoft Fax information service. Unfortunately what comes next is somewhat of a pain, but it's necessary. It helps to retain your good spirits by remembering that you only have to go through this once!

Ideally, you should make Microsoft Fax available under Windows before you install Outlook. If you didn't know about this before you installed Outlook, there's a possible incompatibility problem. For that reason, when you first open Outlook after performing the steps just described, Outlook displays a message saying "A recently installed program may cause Microsoft Office or other e-mail-enabled programs to function improperly..." The message also asks "Do you want Outlook to resolve this problem?" If you see this message, choose Yes.

After you do that, Outlook attempts to reload some files from the Office 2000 CD-ROM. At this stage, you probably have your Windows 98 CD-ROM in your drive (after just installing the Microsoft Fax files from that disk). The Office installation routine prompts you to insert your Office 2000 CD-ROM, which you must do. Choose OK to continue. During the process, you may be asked to close down your computer and restart Windows. If that happens, close all open dialog boxes, close Outlook, then restart Windows. Restart Outlook.

That's it! Now you really are ready to install the Microsoft Fax information service.

ADDING THE MICROSOFT FAX INFORMATION SERVICE TO YOUR PROFILE

You can add the Microsoft Fax information service to your profile either from within Outlook or in the Windows Control Panel. The following procedure adds the information service from within Outlook.

To add Microsoft Fax to your profile:

1. With any Outlook Information viewer displayed, choose Tools, Services to display the dialog box shown in Figure 7.1.

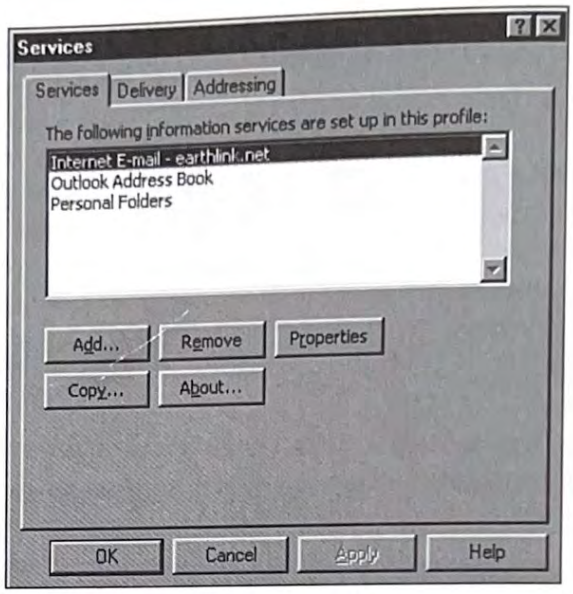


Figure 7.1
This dialog box lists the information services currently in your profile.

2. If your profile doesn't already contain the Microsoft Fax information service, choose Add to display the dialog box shown in Figure 7.2.

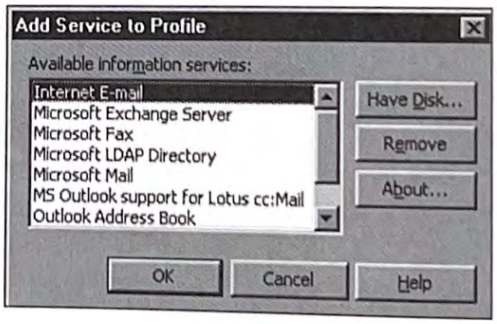


Figure 7.2
This dialog box contains a list of available information services, including Microsoft Fax.

Note

If Microsoft Fax isn't included in the list of available services, that's because you haven't followed the steps in the preceding section. You must follow those steps for Microsoft Fax to appear.

3. Select Microsoft Fax, then choose OK. Outlook displays a message saying that you must specify your name, fax number, and fax modem before you can send a fax, and asks whether you want to do this now. Choose Yes. Outlook displays a dialog box such as the one shown in Figure 7.3.

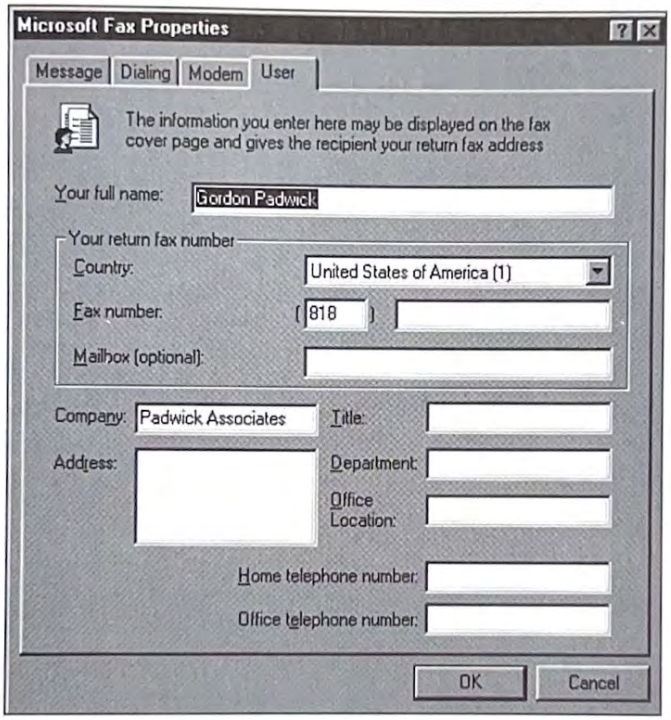


Figure 7.3
This dialog box opens with information about you that's obtained from the information you supplied when you installed Office and other applications.

4. Microsoft Fax insists that you enter your name, country, and fax number. Apart from that, you can enter as much information as you like in this dialog box. Subsequently, you can use the information you provide here to create a fax cover page.
5. After you've entered information in the User tab, select the Message tab shown in Figure 7.4. The default properties in this tab are usually satisfactory for your initial use of Microsoft Fax. A subsequent section of this chapter contains information about these properties.

→ If you need to change the default properties, **see** "Creating and Sending a Special Fax," **p. 250**.

The default properties in this tab are usually satisfactory for your initial use of Microsoft Fax.

Select the Dialing tab, shown in Figure 7.5, to set your dialing properties.

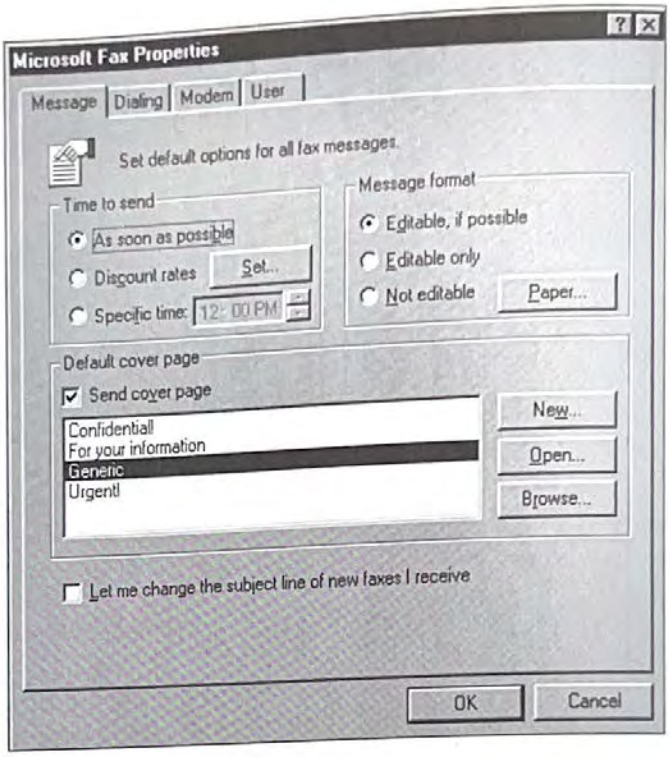


Figure 7.4
This dialog box contains properties for faxes you send.

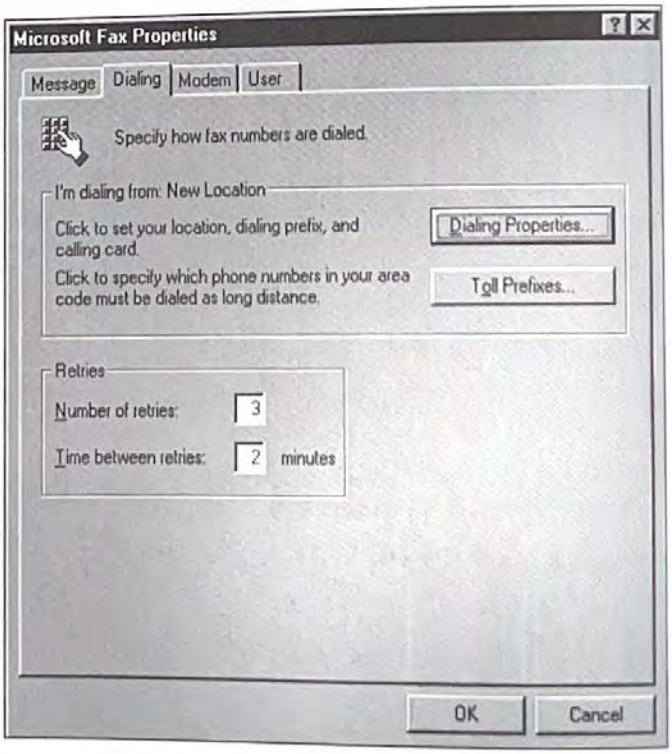


Figure 7.5
Use this tab to verify your dialing properties.

Microsoft Fax initially assumes you'll use the default properties set in Windows Dial-up Networking. To confirm these properties, choose Dialing Properties to display the dialog box shown in Figure 7.6.

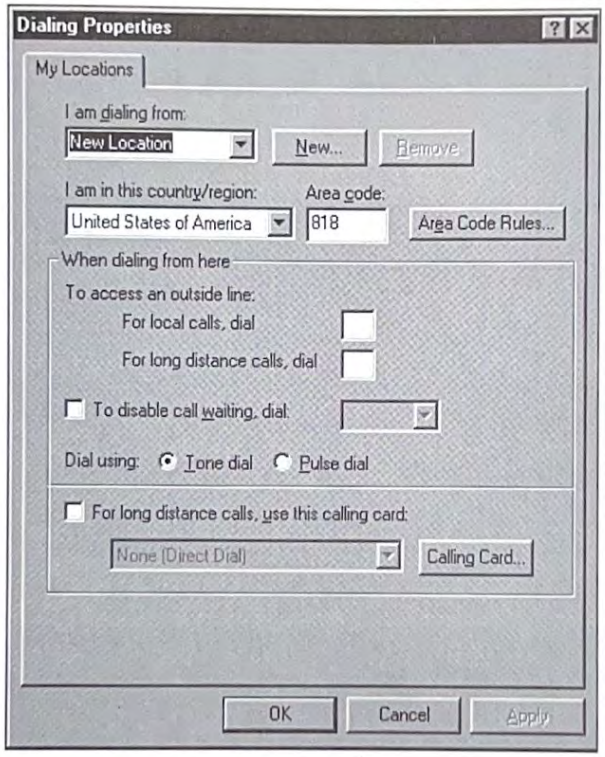


Figure 7.6
You can change your dialing properties in this dialog box.

After you've checked your dialing properties and, if necessary, made changes, choose OK to return to the Dialing tab. If there are phone numbers within your area that must be dialed as long distance, choose Toll Prefixes and select the necessary prefixes.

In the Retries section, change the default Number of Retries and Time Between Retries to whatever you want to use. Select the Modem tab shown in Figure 7.7.

If you have two or more modems installed, select the one you want to use from the list and then choose Set as Active Fax Modem. You can also use this tab to add and remove modems, to set modem properties, and to share your modem with other people who have network access to your computer.

With the Modem tab displayed, choose Properties to display the dialog box shown in Figure 7.8.

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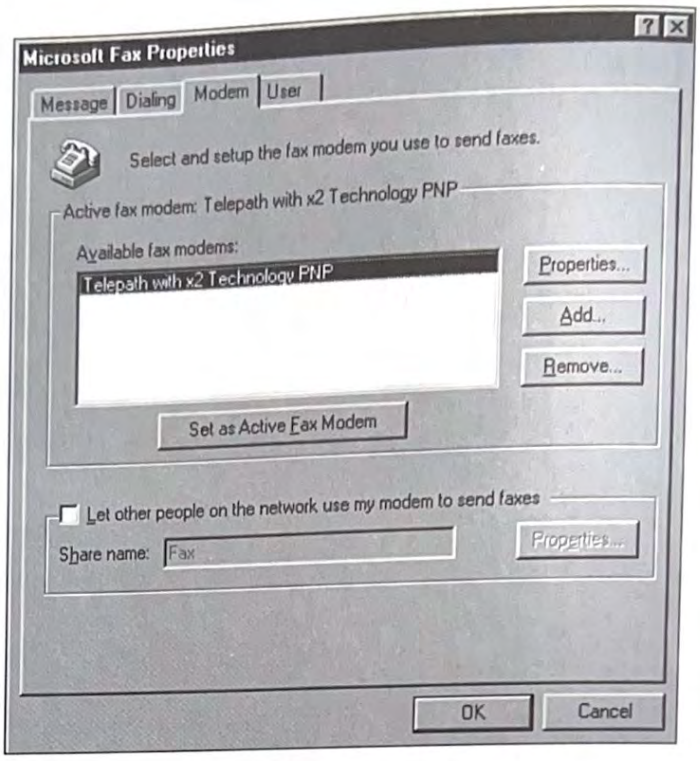


Figure 7.7
Use this tab to select and configure your modem.

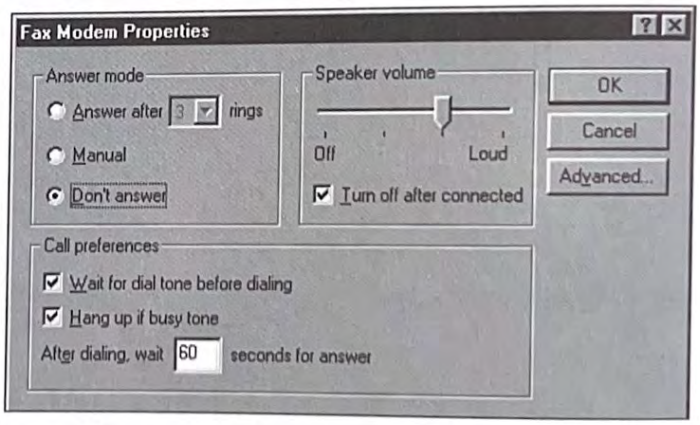


Figure 7.8
Use this dialog box to set up your fax modem properties.

To set the fax modem properties:

1. In the Answer Mode section of the dialog box, select one of the three option buttons. If you want Microsoft Fax to receive incoming faxes automatically, select Answer After then specify the number of rings after which it should answer incoming fax calls (the minimum is two rings). If you select Manual, Microsoft Fax displays a message when an incoming call arrives asking whether you want it to receive a fax. Select Don't Answer if you don't want Microsoft Fax to answer calls.

2. In the Speaker Volume section of the dialog box, move the slider to set the speaker volume. If you enjoy hearing the strange sounds of a fax, uncheck Turn Off After Connected.
3. In the Call Preferences section of the dialog box, normally leave the two check boxes checked. You might want to change the After Dialing, Wait time.
4. Choose Advanced to display the dialog box shown in Figure 7.9. Change the settings in this dialog box only if different settings are recommended by the manufacturer of your fax modem.



Figure 7.9
The default settings in this dialog box are suitable for most fax modems.

Note

The Disable High Speed Transmission check box, if checked, limits the speed at which your modem transmits faxes to 9600 bits per second. If you uncheck this, your modem will be able to transmit at up to 14,400 bits per second. Microsoft reports that some fax modems are unreliable at the higher speed. Uncheck this box only if you know your fax modem can reliably handle the higher speed.

After you've set Microsoft Fax properties in all four tabs, choose OK four times to return to Outlook.

Note

You can change Microsoft Fax properties at any time by choosing Tools, Services to display the Services dialog box. Select Microsoft Fax, and then choose Properties.

CHANGING MICROSOFT FAX PROPERTIES

After you've initially set properties for Microsoft Fax, you can change those properties at any time. To do so, choose Tools, move the pointer onto Microsoft Fax Tools, and choose Options to display the Microsoft Fax Properties dialog box with the Message tab selected, as previously shown in Figure 7.4. You can use the four tabs in this dialog box to change the various properties of Microsoft Fax.

Note

The Microsoft Fax Tools item appears on the Tools menu when you add the Microsoft Fax information service to your profile.

In addition to giving you access to Microsoft Fax properties, Microsoft Fax Tools also contains:

- Request a Fax—Lets you call a fax information service to request a fax
- Advanced Security—Provides access to security keys
- Show Outgoing Faxes—Provides a display of the progress of outgoing faxes

SHARING YOUR FAX MODEM

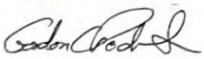
You can share your fax modem so that other network users can use it to send faxes. This can be useful if several people have occasional need to send faxes because only one fax modem and dedicated phone line are needed.

SETTING UP A MICROSOFT FAX SERVER

After you've added Microsoft Fax to your profile and set its properties, you can modify it so that it becomes a *fax server*. However, if you don't want to use your computer as a fax server, ignore this section.

In order to share a modem, you have to allow other people access to files on your computer, as described in the following procedure. If you already have file sharing enabled, the first four steps in this procedure are unnecessary.

Tip #47 from



Be aware that file sharing can be a boon, but it might be a bane. If you enable file sharing, other people might be able to access files on your computer's disks that you don't want them to see. This can be a particular problem if you use a cable TV system to access the Internet. In that case, by enabling file sharing, your neighbors who use the same service can access files on your computer. You can, of course, prevent access by password-protecting your files.

To share your fax modem:

1. In the Windows taskbar, choose Start, move the pointer onto Settings, and choose Control Panel. Double-click Network to display the dialog box shown in Figure 7.10.
2. Choose File and Print Sharing to display the dialog box shown in Figure 7.11.
3. Check I Want to Be Able to Give Others Access to My Files, then choose OK. After a few seconds delay, the Network dialog box reappears. Choose OK to return to the Control Panel. You are asked to insert the Windows CD-ROM so that some files can be read from it. Do so, then after the files have been read, choose Yes to restart your computer.

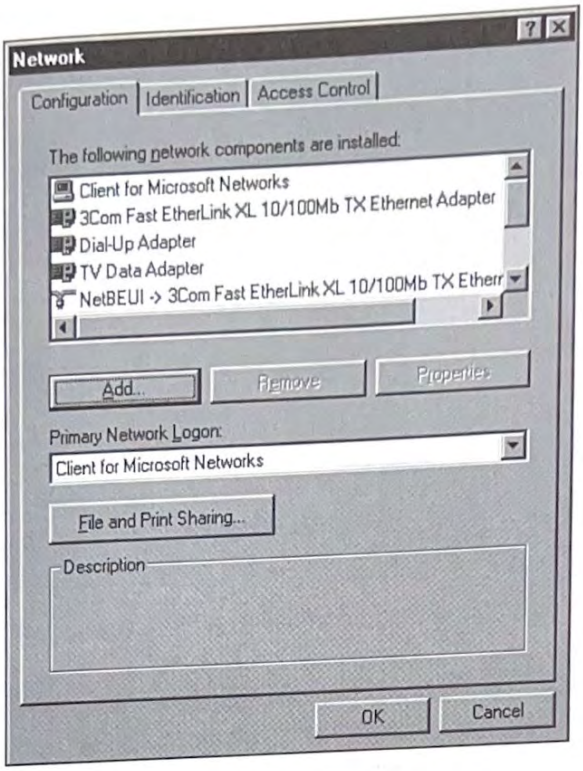


Figure 7.10
Use this dialog box to enable file sharing.

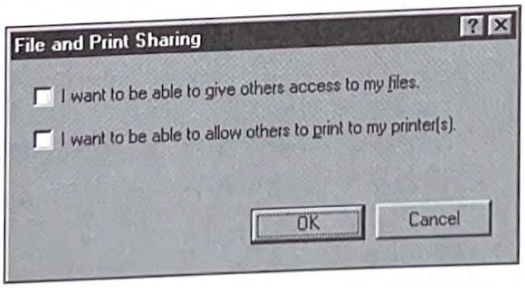


Figure 7.11
Use this dialog box to allow access to your files and printers.

4. After your computer restarts, start Outlook, and choose Tools, Services to display the Services dialog box with the Services tab selected. Select the Microsoft Fax information service and choose Properties. Select the modem tab, previously shown in Figure 7.7.
5. Check Let Other People on the Network Use My Modem to Send Faxes. When you do so, a dialog box asks you to select the drive to use for fax messages. Select a drive on your computer that has plenty of available space. Check OK. By default, the share name for the shared fax service is Fax.
6. Choose Properties at the right of the Share Name box to display the dialog box shown in Figure 7.12.

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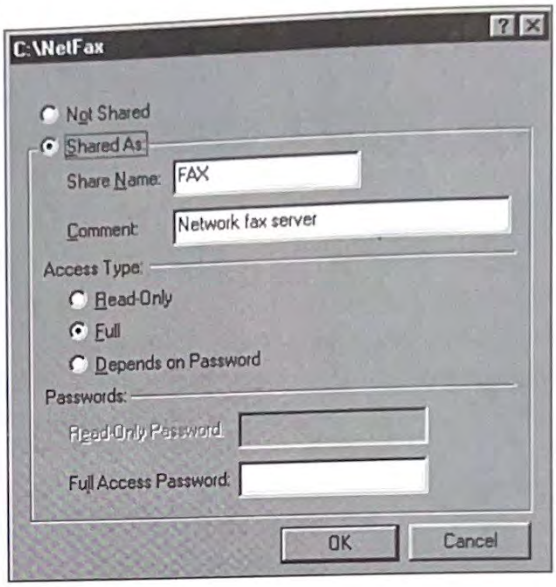


Figure 7.12
You can change the share name in this dialog box.

7. Replace the default Share Name with another name if you want. Make sure the Full Access Type option button is selected. Choose OK to return to the Microsoft Fax Properties dialog box. Choose OK to close that dialog box to close the Services dialog box.

Now your computer is set up as a fax server.

SETTING UP A MICROSOFT FAX CLIENT

After you've set up Microsoft Fax as a fax server on one computer, as described in the preceding section, you can add Microsoft Fax as a client to profiles on other networked computers running Outlook 97, C/W Outlook 98, or C/W Outlook 2000. The following procedure assumes you have one of these versions of Outlook installed on network computers.

To add Microsoft Fax as a fax client:

1. With any Outlook Information viewer displayed, choose Tools, Services to display the Services dialog box.
2. Choose Add to display the Add Service to Profile dialog box. Select Microsoft Fax, and choose OK to display a dialog box telling you that you must specify your name, fax number, and modem, and asking whether you want to do that now. Choose Yes to display the Microsoft Fax Properties dialog box with the User tab selected, as previously shown in Figure 7.3.
3. Enter your fax number and whatever other information you want to appear on cover pages. Select the Modem tab, shown previously in Figure 7.7.
4. Choose Add to display the Add a Fax Modem dialog box, shown in Figure 7.13.

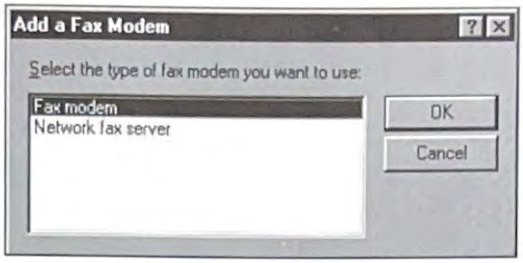


Figure 7.13
If the computer is connected by way of a network to a fax server, Network Fax Server is available to be added.

5. Select Network Fax Server and choose OK to display the dialog box shown in Figure 7.14. The dialog box is initially displayed with the Path box empty.

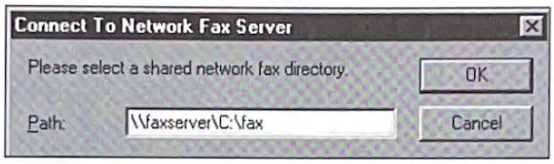


Figure 7.14
The dialog box shown here has the path to the shared network fax folder already entered.

6. In the Path box, enter the path to the shared network fax folder, using the format shown in Figure 7.14, and choose OK to return to the Microsoft Fax Properties dialog box with the Modem tab selected. The list of available fax modems contains the path to the shared network fax folder.

Note

The computer must be connected to the computer on which the fax server is installed and Outlook must be running on that computer at the time you enter the path name in the Connect to a Network Fax Server dialog box. Otherwise, you'll see an error message when you attempt to define the fax server.

7. Select the path to the shared network fax folder and then choose Set an Active Fax Modem. Choose OK twice to close the dialog boxes and return to the Information viewer.

Now the person who uses the client can send faxes by way of the fax server and the fax server's modem and phone line, just as if the client computer had its own modem and phone line.

Note

A fax client set up in this way can only send faxes by way of the fax server. Incoming faxes are received by the fax server and saved in the Outlook Inbox folder on that computer. You can use e-mail to distribute incoming faxes to the appropriate recipients, something that can be done manually or automated by the use of rules.

→ Outlook provides useful tools to help you slog through mundane tasks, such as distributing incoming faxes to the proper recipients; **see** "Using the Rules Wizard to Create Rules That Manage Incoming Messages," **p.624**.

CREATING AND SENDING A FAX

After you have Microsoft Fax in your C/W Outlook Profile, you can create and send a fax.

Before getting started, you should know that there are two ways to create text for a fax. If the fax is short and simple, the easiest way is to enter the text in one of the New Fax Wizard windows. See the following section "Creating and Sending a Simple Fax."

However, if the fax is long, it's usually better to create the fax as a Word document and then, after you've finished revising that document, add it to the fax. See "Creating and Sending a Special Fax" later in this chapter.

CREATING AND SENDING A SIMPLE FAX

The following steps describe how you create and send a simple fax, using the fax properties you've previously set.

To create a simple fax:

1. With the Inbox information viewer displayed, choose Actions, New Fax Message to display the first Compose New Fax Wizard window shown in Figure 7.15.

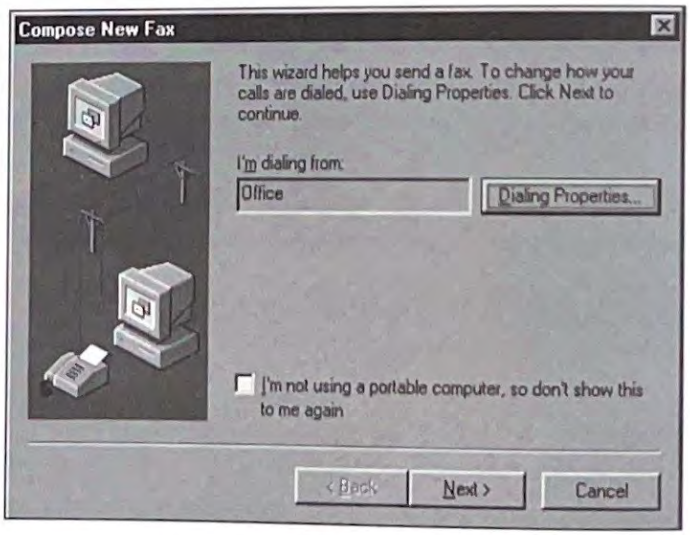


Figure 7.15
This window displays the name of the location from which you're dialing.

Note

You can't choose File, move the pointer onto New, and choose New Fax, as you can when using WinFax SE under IMO Outlook.

2. Choose Dialing Properties if you want to change the name of your location or other dialing properties. If you do so, Outlook displays the dialog box shown in Figure 7.16.

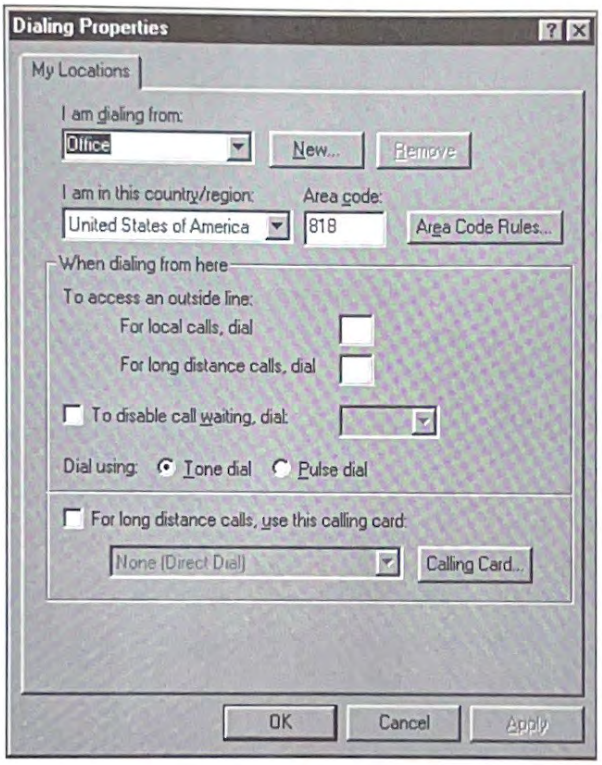


Figure 7.16
Make any changes to your dialing properties in this dialog box.

3. After making changes to your dialing properties, choose OK to return to the Compose New Fax Wizard window. If you're using a desktop computer that's always in the same place, check the box near the bottom of the window, otherwise leave the box unchecked. Choose Next > to display the second wizard window, shown in Figure 7.17.
4. Enter the recipient's name in the To box, enter the recipient's fax number in the Fax # boxes, and choose Add to List to display the recipient's name in the Recipient List box. Alternatively, you can choose Address Book to select one or more recipients from your address books. Choose Next > to display the next wizard window, shown in Figure 7.18.

Note

You can select one of the four cover pages supplied with Windows: Confidential, For Your Information, Generic, and Urgent. You can also select any custom cover pages you have created.

→ Most likely, you'll want to create your own custom fax cover pages; **see** "Creating a Fax Cover Page," **p. 262**.

5. Choose No if you don't want to send a cover page, or choose Yes if you do want to send one. If you choose Yes, select the cover page you want to use. Choose Next > to display the next wizard window, shown in Figure 7.19.

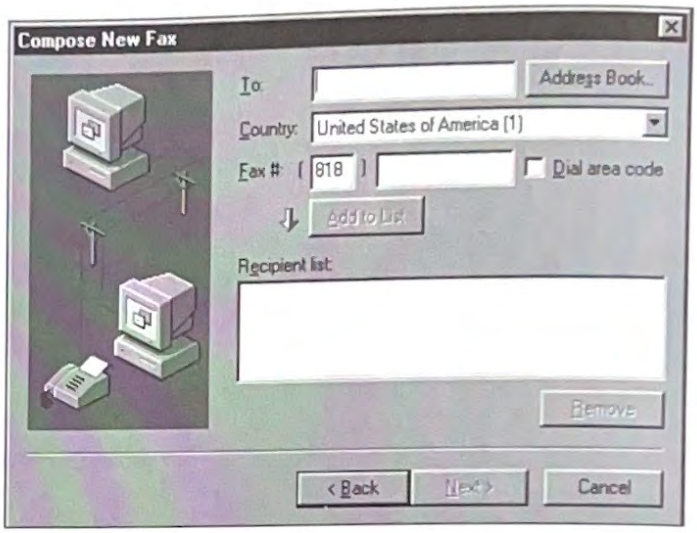


Figure 7.17
Use this window to identify the recipient.

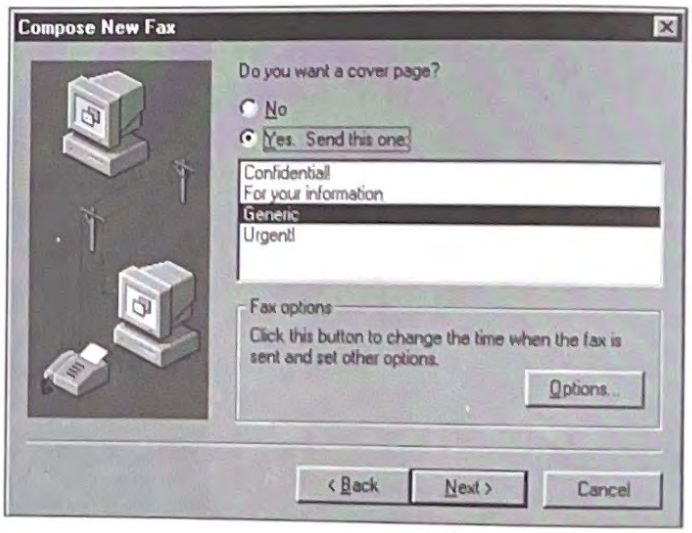


Figure 7.18
Select a cover page in this window.

6. Enter the subject of the fax in the Subject box and the text of the fax in the Note box. Uncheck Start Note on Cover Page if you want to start the note on a separate page. Choose Next > to display the next wizard window, shown in Figure 7.20.

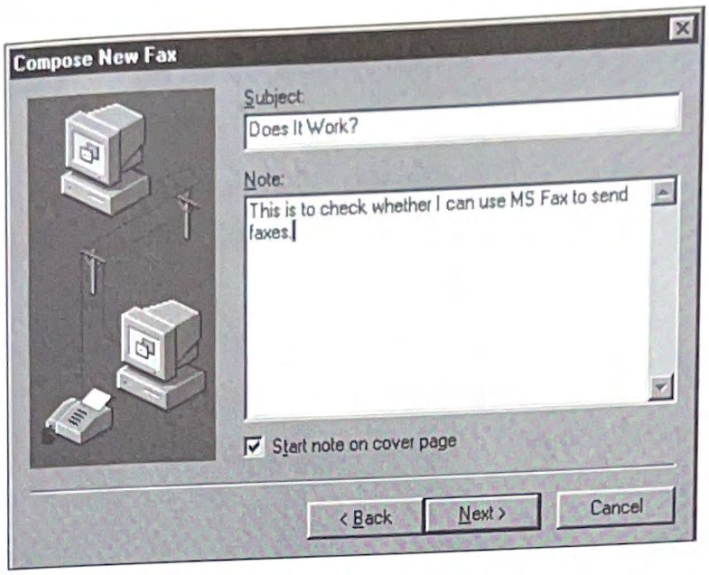


Figure 7.19
Enter the subject and text of the fax in this window.

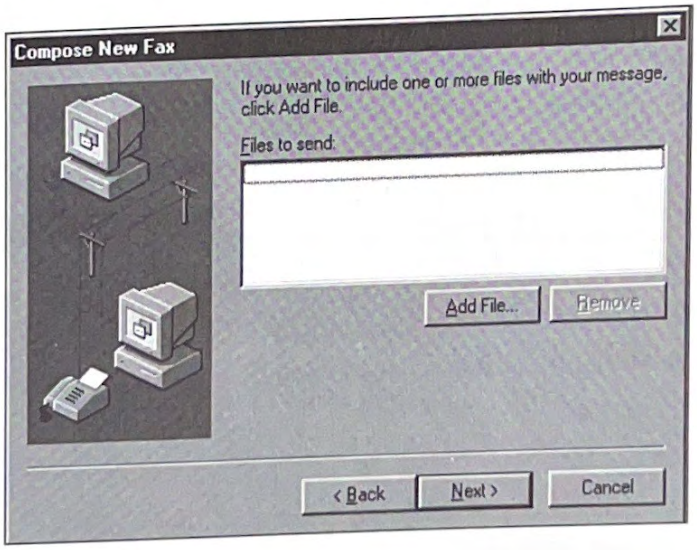


Figure 7.20
You can use this window to add files to the fax, something you probably don't want to do in the case of a simple fax.

7. Choose Next > to display the final wizard window, shown in Figure 7.21.
8. Choose Finish to send the fax.

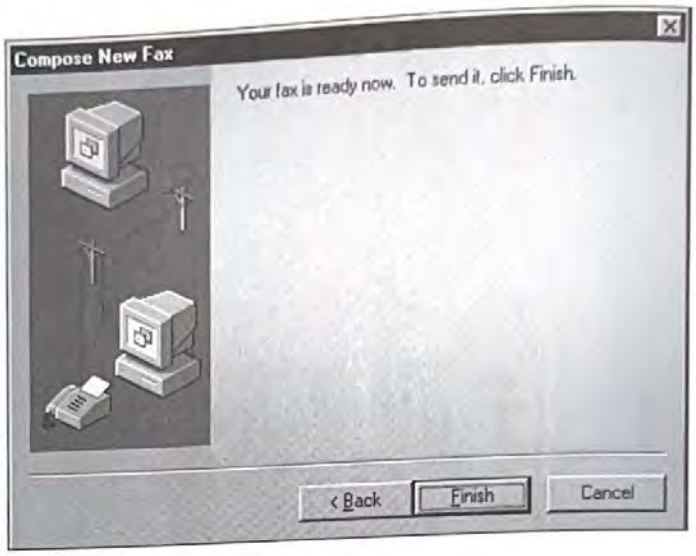


Figure 7.21
This window confirms that the fax is ready to send.

The wizard window closes when you choose Finish. Almost immediately a message box is displayed to keep you informed about the progress of sending the message. In sequence, the message box displays:

- Processing Fax—Displayed while the text of the message is being converted into a graphics image ready for sending.
- Initializing Modem—Displayed while your modem is being initialized.
- Dialing Recipient—Displayed while your modem is dialing the recipient and waiting for a response.
- Connecting—Displayed while your Microsoft Fax and the recipient's fax machine or fax software are establishing communications.
- Sending—Displayed while the fax is being sent. During this time, the message box displays the number of the page currently being sent and the percentage of that page that has been sent.

CREATING AND SENDING A SPECIAL FAX

From time to time, you'll want to create a fax that requires more attention to details than described in the preceding section. On those occasions you'll need to use some of the steps described here. Don't be put off by the large number of steps; you'll rarely need to use more than a few of them.

To create and send a special fax:

1. Create, or identify, the text and graphics files you want to send as part of the fax.
2. With the Inbox Information viewer displayed, choose Actions, New Fax Message to display the first Compose New Fax Wizard window shown in Figure 7.22.

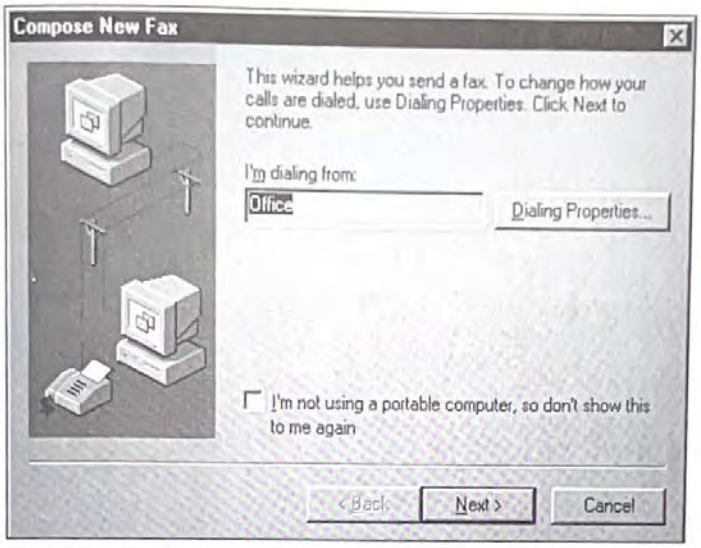


Figure 7.22
This window identifies your dialing location.

3. If you're dialing from a location other than the one identified in the I'm Dialing From box, choose Dialing Properties to open the Dialing Properties dialog box shown in Figure 7.23.

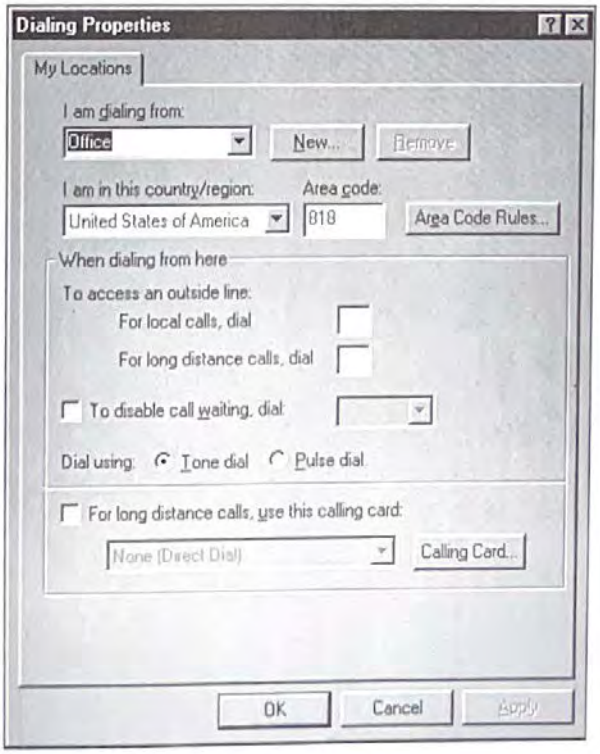


Figure 7.23
Use this dialog box to select a different dialing location, or to create a new one.

4. After you've selected the appropriate location, choose OK to return to the Wizard window. Choose Next > to display the second wizard window, shown in Figure 7.24.

Note

If you always dial from the same location, check I'm Not Using a Portable Computer.... After you do that, the first wizard window isn't subsequently displayed.

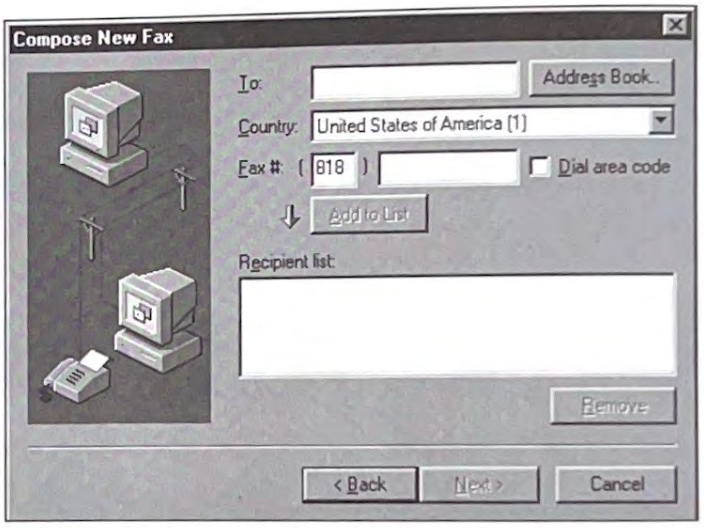


Figure 7.24
Use this window to identify the person to whom you want to send the fax.

5. Choose Address Book to open the dialog box shown in Figure 7.25.

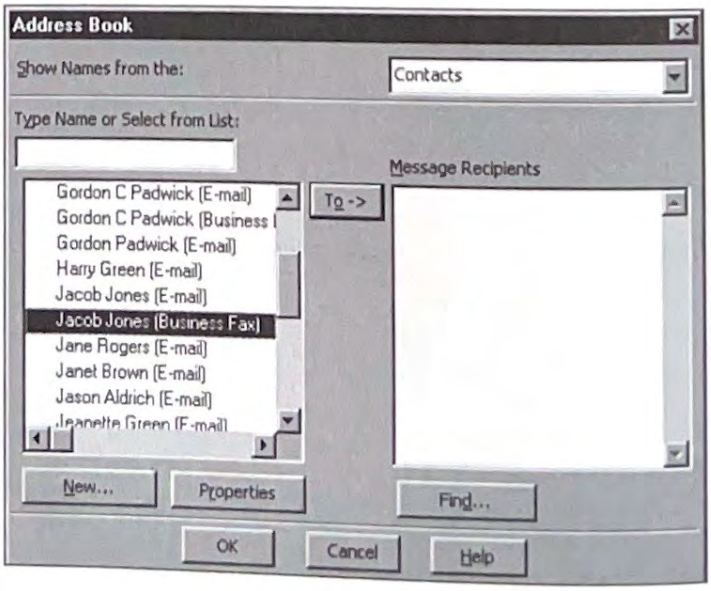


Figure 7.25
The Address Book dialog box is shown here with a recipient selected.

Note

Instead of choosing a name from your address book, you can enter a person's name in the To box, open the Country drop-down list and select the person's country, and enter the person's fax number in the Fax # boxes. Then choose Add to List to move the person's name into the Recipient List box.

6. Select the name of a person for whom you have a fax number, choose To-> to copy that person's name into the Message Recipients list, and then choose OK to return to the wizard window in which the selected person's name is shown in the Recipient List.

Note

You can add more than one recipient into the Recipient List by choosing names from your address book or by entering names. You can delete a name from the Recipient List by selecting that name and then choosing Remove.

7. If you're sending a fax to someone within your own telephone area code, Windows Dial-up Networking normally doesn't dial the area code. If you want the area code to be dialed, check Dial Area Code. Choose Next > to display the next wizard window, shown in Figure 7.26.

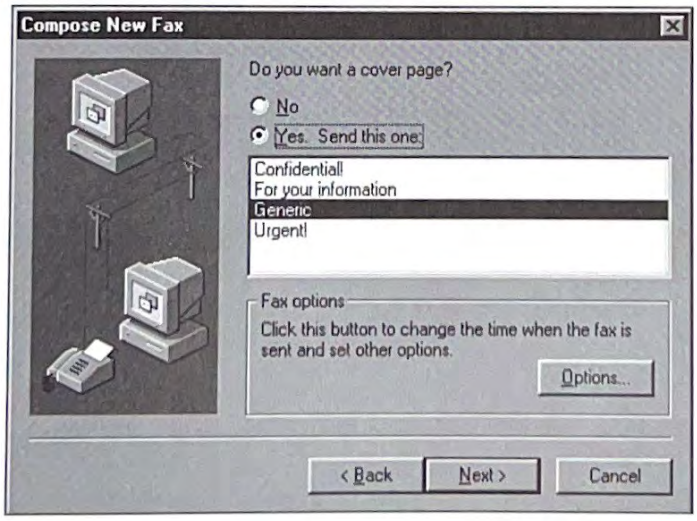


Figure 7.26
Use this window to select a cover page and to specify when the fax should be sent.

8. Select No if you don't want to send a cover page, or Yes if you want to do so. If you select Yes, Microsoft Fax uses the default cover page you selected when you set up properties, unless you select a different one in the list. You can select one of the cover pages provided with Windows or a custom cover page you've created.
9. If you want to change the default fax properties, choose Options to display the dialog box shown in Figure 7.27.

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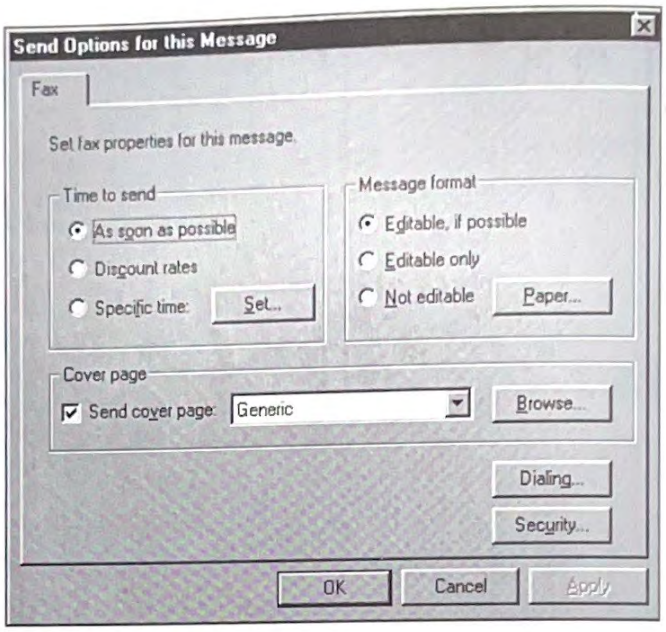


Figure 7.27
Use this dialog box to select fax properties for the current message.

10. In the Time to Send section of the dialog box, select one of the three option buttons. If you select Specific Time, choose Set to open the dialog box shown in Figure 7.28.



Figure 7.28
Specify the time at which the fax should be sent in this dialog box.

11. In the Message Format section of the Send Options to This Message dialog box, select one of the three option buttons.

Note

Normally, select Editable, if Possible (the default). If you do so, Microsoft Fax sends the fax in *editable,* binary format if you and the recipient both have Class 1 fax capability; if either of you has Class 2 capability, Microsoft Fax sends the fax in *facsimile* format.

When you send faxes in editable, binary format recipients can read and edit them just like an e-mail message. If you include a file as an attachment to an editable fax, the file is transmitted in its native format.

If you select Editable Only, Microsoft Fax sends the fax only if the recipient's fax capability supports the editable, binary format. If not, the fax isn't sent.

If you select Not Editable, Microsoft Fax sends the fax in facsimile format.

12. Also in the Message Format section of the dialog box, you can choose Paper to display the dialog box shown in Figure 7.29. In this dialog box, open the Paper Size drop-down list and select a paper size, open the Image Quality drop-down list and select a quality, and select Portrait or Landscape orientation.

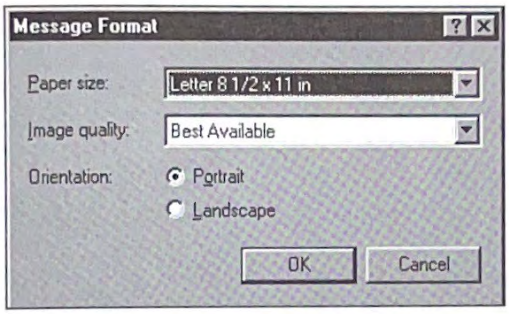


Figure 7.29
Use this dialog box to specify the message format.

13. Choose Dialing if you want to change your dialing properties. Microsoft Fax displays a dialog box in which you can change how a call is dialed.
14. Choose Security to display the dialog box, shown in Figure 7.30, in which you can choose various security options.

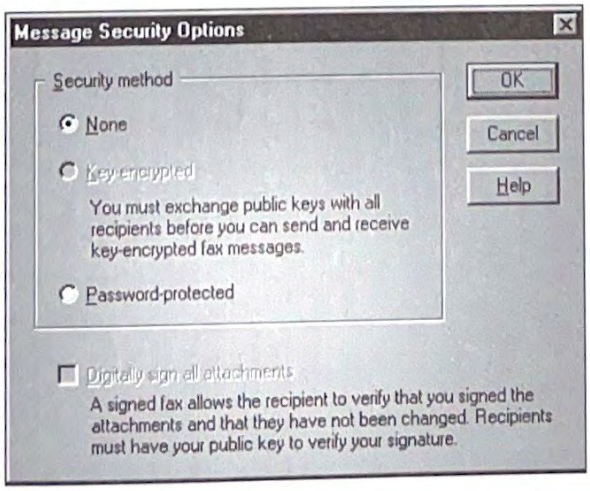
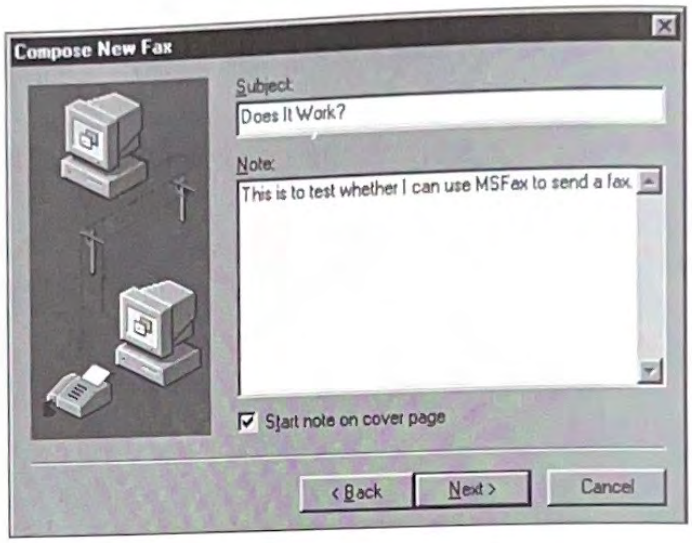


Figure 7.30
Use this dialog box to select security options for the fax.

→ To learn more about keeping your e-mail from prying eyes, **see** "Using Outlook Securely," **p. 993**.

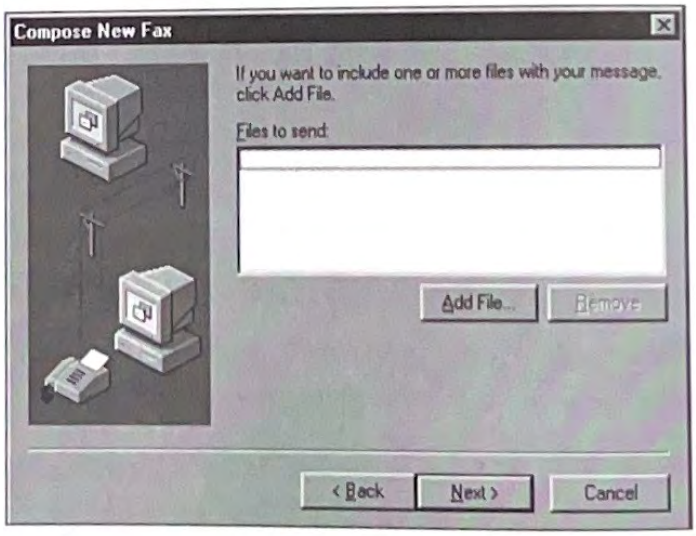
15. After you've completed any changes to fax options, choose Next > to display the next wizard window, shown in Figure 7.31.

Figure 7.31
This is where you compose the fax.



16. Enter a subject for the fax in the Subject box and the text of the fax in the Note box. If you want to start the fax on the cover page, leave Start Note on Cover Page checked, otherwise uncheck it. Choose Next > to display the next wizard window, shown in Figure 7.32.

Figure 7.32
You can use this window to add files to the fax.



17. To add one or more files to the fax, choose Add File to display the dialog box shown in Figure 7.33.

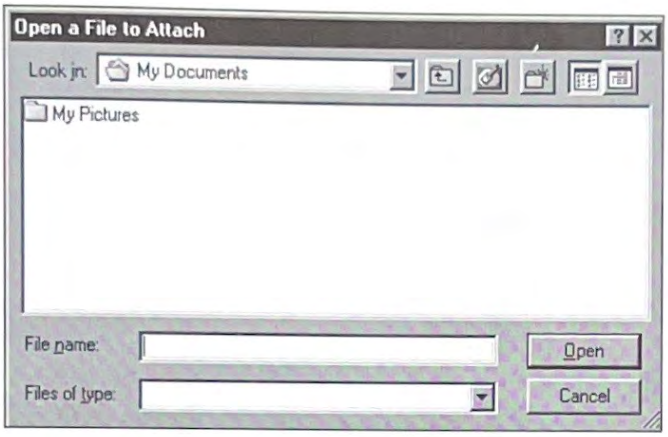


Figure 7.33
You can use this dialog box to select files you want to add to the fax.

18. Navigate to a file you want to add to the fax, select that file, and choose Open to return to the wizard window previously shown in Figure 7.33 in which the path and file names of the selected file are now shown in the Files to Send box.
19. Repeat steps 17 and 18 as many times as necessary to add more files to the fax. Choose Next > to display the final wizard window, shown in Figure 7.34.

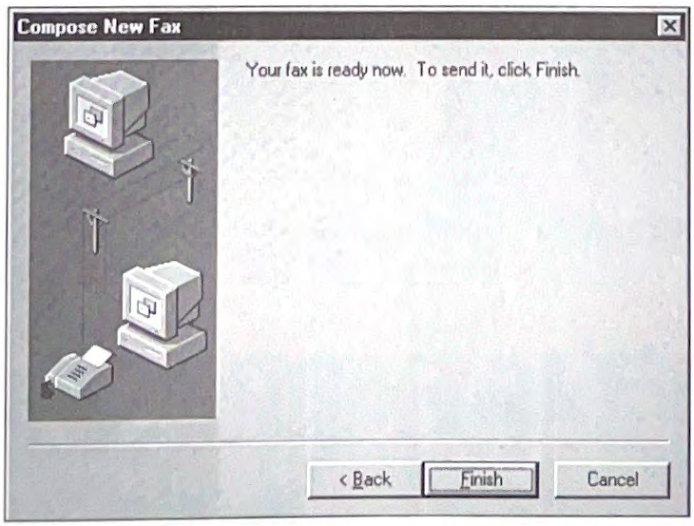


Figure 7.34
You've finished creating the fax.

20. Choose Finish to send the fax.

SENDING AN OFFICE DOCUMENT AS A FAX

After youíve created an Office document, such as some text in Word or a workbook in Excel, you can directly send that document as a fax. The following paragraphs describe how to send a Word document as a fax; sending an Excel workbook is quite similar.

Tip #48 from



The following two sections describe two ways to send an Office document, the first being the method–the Fax Wizard–suggested in Microsoft's documentation. If you have trouble with that, try the second method (Microsoft Fax).

USING THE FAX WIZARD TO FAX AN OFFICE DOCUMENT

Word uses the Fax Wizard to send a document as a fax. After creating a Word document, choose File, move the pointer onto Send To, and choose Fax Recipient. The first time you do this, Word displays a dialog box saying it "canít start this wizard" because this "feature is not currently installed." To install the wizard, choose Yes. Youíll be asked to insert the Office 2000 CD-ROM into your ROM drive. Word installs the Fax Wizard and displays the first wizard window, as shown in Figure 7.35.

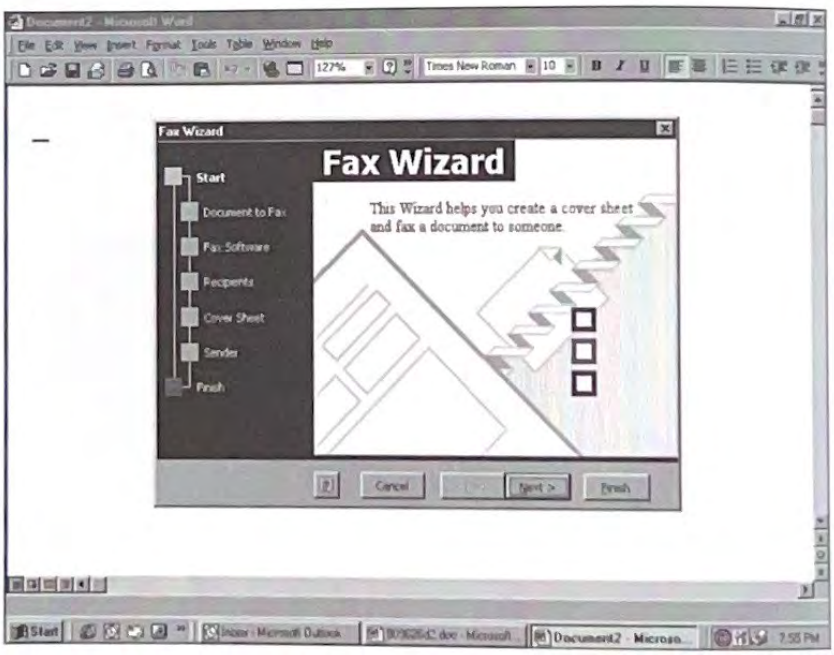


Figure 7.35
Word uses the Fax Wizard to fax a document.

Note

When you subsequently want to fax a Word document, the Fax Wizard is displayed without having to install it.

Follow through the steps in the Fax Wizard to fax the document. When you come to the final step, choose the Send Fax Now button. Outlook opens if itís not already running and sends the fax.

USING MICROSOFT FAX TO FAX A DOCUMENT

After you've installed Microsoft Fax, Microsoft Fax is listed as an available printer in Windows applications. You can select this as a printer in order to fax a document.

To fax a document:

1. With a Windows document open an application such as Word, choose File, Print to display the Print dialog box.
2. In the Print dialog box, open the drop-down Name list and select Microsoft Fax.
3. Make the usual selections in the Print dialog box (page range, number of copies, and so on).
4. Choose OK. After a few seconds delay (substantially more than a few seconds if the document is long or complex), Outlook's Compose New Fax Wizard is displayed.
5. Use the various wizard windows to prepare the fax for sending. The window in which you can add a file is not displayed, because the Office document is already added.
6. Microsoft Fax sends the Office document as a fax when you choose Finish on the last wizard window.

RECEIVING A FAX

If you're using a dedicated phone line for your fax modem and are prepared to leave your computer turned on with Outlook running (probably in the background) you can use Microsoft Fax to receive incoming faxes. Two of the benefits of doing this are

- You can subsequently use your computer printer to print faxes—much better than using the thermal printer in many fax machines.
- You can preview faxes and only print those you need to have as hard copy, thus reducing your use of expensive thermal paper.

To enable Microsoft Fax to automatically receive incoming faxes you must have selected Answer After in the Fax Modem Properties dialog box shown previously in Figure 7.8.

Note

If you selected Manual in the Fax Modem Properties dialog box, Microsoft Fax displays a dialog box when an incoming fax is received. If you want Microsoft Fax to receive the fax, choose Yes in that dialog box.

VIEWING RECEIVED FAXES

When Microsoft Fax answers an incoming message, it displays a message box with the following sequence of messages:

- Ringing—Displayed while the incoming message is ringing and before Microsoft Fax picks up the call.

Note

One of the things you can't do in Imaging for Windows is convert the fax text into editable format. However, if you own a scanner, that scanner probably came with an *Optical Character Recognition (OCR)* application that converts an image of text into editable text. You can probably use that application to convert the text in a fax to text you can edit using a word processor.

PRINTING A RECEIVED FAX

You can't print a received fax from the Inbox Information viewer.

To print a fax you've received, double-click the message header in the Inbox Information viewer to display it in the Imaging window. Then choose File, Print.

CREATING A FAX COVER PAGE

After you've installed Microsoft Fax on your computer, you can use the Fax Cover Page Editor to modify the four standard cover pages and also to create your own cover pages.

Note

One of the benefits of using Microsoft Fax (only available with C/W Outlook) is that you can create custom cover pages. WinFax SE (for IMO Outlook) doesn't let you do that.

To start the Cover Page Editor, choose Start in the Windows taskbar, move the pointer onto Programs, Accessories, Fax, and choose Cover Page Editor to display the window shown in Figure 7.38.

The Style and Drawing toolbars contain many tools you can use to create a cover page. Choose Help, Help Topics to find detailed information about these tools and about creating cover pages.

The default Microsoft cover pages are in the files:

- Confidential!.cpe
- For Your Information.cpe
- Generic.cpe
- Urgent.cpe

These are normally in your C:\Windows folder.

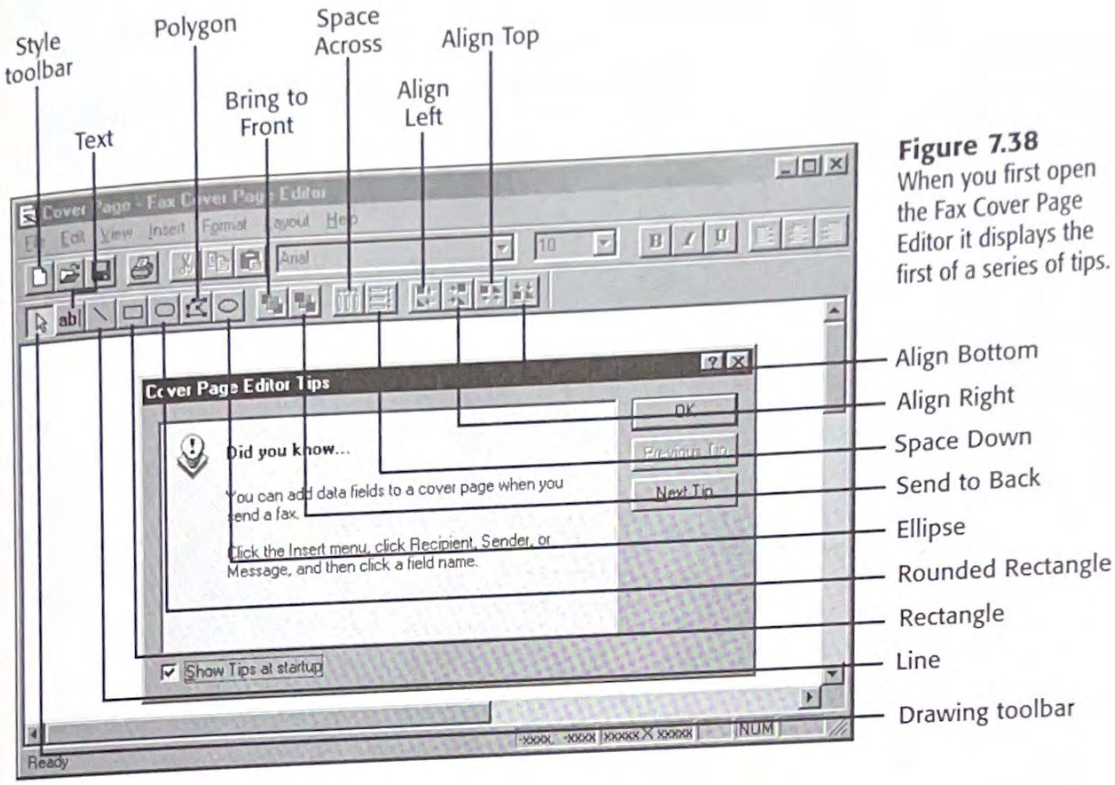


Figure 7.38
When you first open the Fax Cover Page Editor it displays the first of a series of tips.

MODIFYING A SUPPLIED COVER PAGE

You'll probably find that the four cover pages supplied with Microsoft Fax are usable, but aren't quite what you'd like to have. For example, you might like to have your company logo on the cover pages. You can easily do that if you have the logo available as a graphics file.

To add a logo to a cover page:

1. With the Fax Cover Page Editor displayed, choose File, Open to display the Open dialog box.
2. In the Open dialog box, navigate to the Windows folder that contains the supplied cover pages (probably C:\Windows), and select a cover page (such as Generic.cpe). Choose Open to display the cover page, as shown in Figure 7.39.
3. To insert a logo (or other graphics), choose Insert, Object to display the dialog box shown in Figure 7.40.
4. Choose Create from File, navigate to the folder that contains the graphics file you want to insert, select that file, and choose Insert to return to the Insert Object dialog box. Choose OK to insert the image into the cover page at the top-left corner.

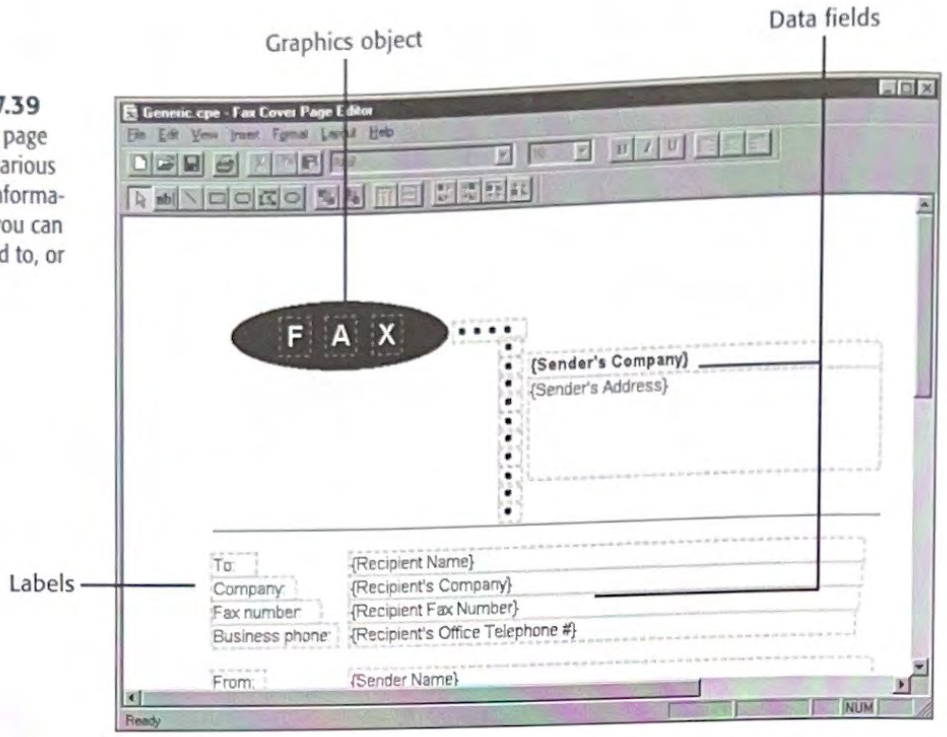


Figure 7.39
The cover page contains various fields of information that you can delete, add to, or change.

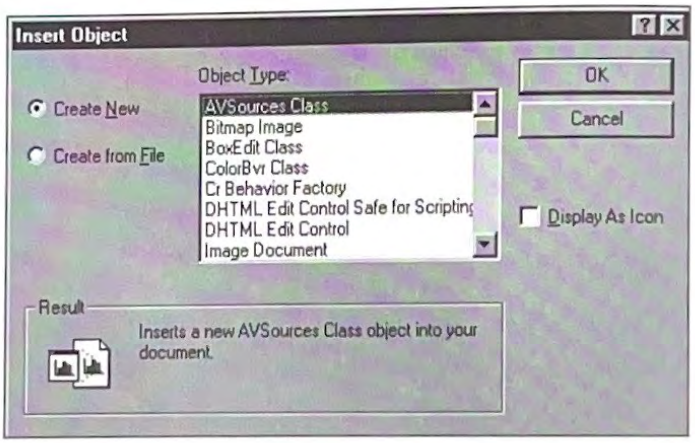


Figure 7.40
You can use this dialog box to create an object as well as to insert an existing file.

Note

Instead of seeing the graphics image on the cover page, you may only see an icon representing the graphics file. That happens if Windows doesn't associate the type of graphics file you selected with a graphics application that can open it. For information about associating files with applications, refer to "Associating File Types with Programs" in Windows Help.

5. Click the graphics image to select it. You know it's selected when handles appear at the four corners and at the middle of each edge. You can change the size of the image by dragging any of the handles; you can move the image by pointing onto the image (anywhere but on a handle) and dragging. Figure 7.41 shows a cover page with an inserted image.

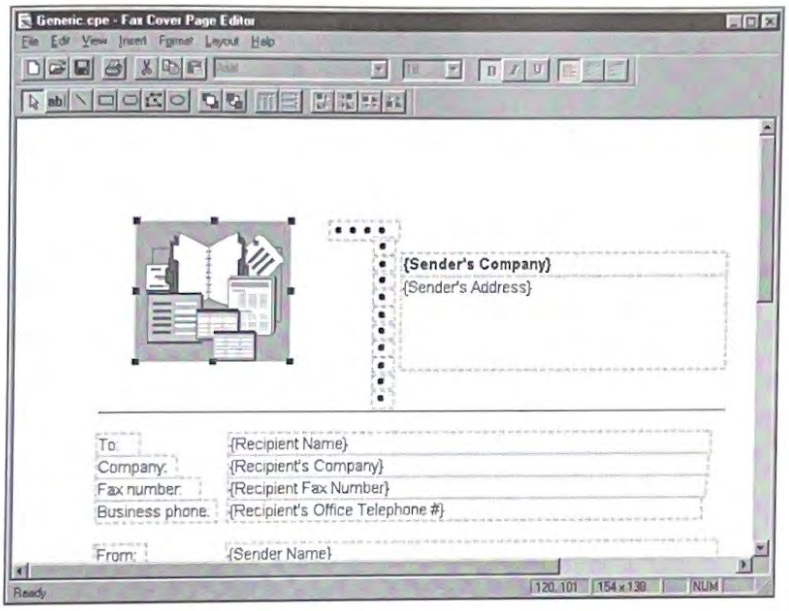


Figure 7.41
This is the generic cover page with an inserted image. The image shown here is one of the clipart images supplied with Office.

In addition to graphics, a cover page contains various text fields. Some of these are labels that always appear on the cover page; others are data fields that display information you provide when setting up Microsoft Fax properties.

You can select any label or data field by selecting it and then you can

- Delete it by pressing Delete. Alternatively, choose Edit, Delete.
- Move it by dragging.
- Change its size by dragging a handle.
- Change the font by choosing Format, Font to display the Windows Font dialog box, in which you can select a font name, style, and size. Alternatively, open the drop-down Font Name list in the Style toolbar and select a font; open the drop-down Font Size list and select a size; choose the Bold, Italic, or Underline buttons.

To change a label's text, select the label, point onto the text, and use conventional editing techniques to delete and insert characters.

To insert a label, choose the Text button in the Drawing toolbar, move the pointer to the approximate position where you want the label to be, press the mouse button, and drag to

create a rectangle. Click within the rectangle to create an insertion point, type the label text, and click outside the rectangle. You can drag the label's handles to change the size of the rectangle, and you can drag the label to a different position on the cover page.

You can insert new data fields into the cover page. Choose Insert, and then

- Move the pointer onto Recipient to display a list of recipient-related fields: Name, Fax Number, Company, Street Address, City, State, Zip Code, Country, Title, Department, Office Location, Home Telephone Number, Office Telephone Number, To: List, and CC: List.
- Move the pointer onto Sender to display a list of sender-related fields: Name, Fax Number, Company, Address, Title, Department, Office Location, Home Telephone Number, and Office Telephone Number.
- Move the pointer onto Message to display a list of message-related fields: Note, Subject, Time Sent, Number of Pages, and Number of Attachments.

Select a data field in one of these lists. When you do so, a label containing the name of the selected field and that field appear on the cover page, with both selected. At this point, you can

- Drag the label and data field together to any position on the cover page.
- Drag the data field by itself. To do this, click on an unoccupied place on the cover page to deselect the label and the data field. Then click the data field to select it. Now you can drag the data field without moving the label.
- Change the text in the label, as described previously in this section.

After you've finished making changes to the cover page, choose File, Save As to display the normal Windows Save As dialog box, enter a name for the changed cover page, and choose Save. By default, the Fax Cover Page Editor saves the file in your Windows folder that also contains the supplied cover page files.

Tip #50 from



Save the changed cover page with a name other than that of the original cover page so that you can subsequently use the original cover page if the need arises.

CREATING A NEW COVER PAGE

Unless you want to create a cover page that's completely different from one of the supplied pages, it's usually easier to modify an existing page instead of creating one from scratch. You can create a cover page from scratch if you prefer to do that.

To create a new cover page:

1. Choose Start in the Windows taskbar, then move the pointer onto Programs, move the pointer onto Accessories, move the pointer onto Fax, and choose Cover Page Editor to display an empty cover page.

2. To add a data field to the empty page, choose Insert, move the pointer onto Recipient, Sender, or Message to display a list of data fields, and select the data field you want to add. Drag the data field and its label into position on the page.
3. Repeat step 2 to add more data fields.
4. To add graphics objects to the cover page, choose Insert, Object to display the Insert Object dialog box previously shown in Figure 7.40. Choose Create from File, identify the file you want to insert, and choose OK to insert the object in the page. Drag the object into position.
5. Repeat step 4 to add more graphics objects.
6. Choose File, Save As to display the Save As dialog box. Enter a name for the new cover page and choose Save to save it.

Note

By default, Outlook saves the cover page file in your Windows folder, which is the folder that contains the supplied cover page files.

Tip #51 from



You can set up Outlook's Journal to keep a record of faxes you send to specific people. See "Recording Faxes in Your Journal," in Chapter 12 to learn more.

REPLACING MICROSOFT FAX WITH WINFAX PRO

If you only send and receive occasional faxes, you'll probably find that Microsoft Fax satisfies your needs. However, if you're a regular fax user, you should consider replacing Microsoft Fax with WinFax Pro, which is available from Symantec.

Note

The remaining pages of this chapter refer specifically to WinFax Pro version 9. Some of the information doesn't apply to earlier versions of WinFax Pro.

Some of the capabilities of WinFax Pro that aren't available in Microsoft Fax are

- Previewing Faxes—You can see exactly what a fax will look like before you send it.
- Optical Character Recognition—You can convert text in a fax you receive into text you can edit in a word processor.
- Automatic Paging—WinFax Pro can automatically send a message to your pager when faxes arrive.
- Automatic Forwarding—WinFax Pro can automatically forward faxes it receives to another fax number.
- Fax Sharing—A workgroup consisting of up to 20 people can share one fax modem and one phone line.

There's much more, but this short list should be enough to convince regular fax users that upgrading to WinFax Pro is something they should consider.

DISCOVERING MORE ABOUT MICROSOFT FAX

This chapter is intended to provide all the information you need to install and use Microsoft Fax. You can find additional information in Chapter 27 of the Microsoft Windows 95 Resource Kit.

The Resource Kit chapter contains information about security issues, including the use of passwords and encryption. The section "Technical Notes for Microsoft Fax" contains detailed information about the formats used to send messages and the Windows registry keys used by Microsoft Fax. Although written specifically for Windows 95, the information appears to apply equally to Windows 98.

Note

The Microsoft Windows 98 Resource Kit does not contain detailed information about Microsoft Fax.

CHAPTER 22

CREATING AND USING RULES

by Gordon Padwick

In this chapter

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WHAT IS A RULE?

C/W IMO

A *rule* is a set of conditions, actions, and exceptions that controls how Outlook processes and organizes messages. The conditions determine which types of messages a rule applies to; the actions are what the rule does; the exceptions determine when a rule does not apply to certain messages. Some rules work on messages you receive; other rules work on messages you send.

These two examples will help you understand the sorts of things rules can do:

- You can create a rule that forwards all messages you receive from a specific person to another person.
- You can create a rule that moves copies of messages you send to a specific person into a certain folder.

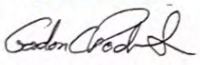
To create basic rules, choose Organize in the Inbox Information viewer's toolbar. To create more sophisticated rules, use Outlook's Rules Wizard.

You can create and edit rules to do things such as:

- Perform an action when a message arrives
- Perform an action before a message is sent
- Move incoming messages that satisfy certain conditions into a specific folder
- Notify you when certain messages arrive
- Automatically delete messages that satisfy certain conditions
- Assign a flag to certain messages
- Automatically reply to certain messages
- Notify you when recipients read certain messages

You can combine these and other actions in many ways to create various rules, as described in the rest of this chapter.

Tip #144 from



Outlook 2000 contains rule conditions and actions that weren't available in previous versions of Outlook. The Outlook Help topic "Rule Conditions and Actions that Work Only in Outlook 2000" contains information about what's new in Outlook 2000.

This chapter focuses on rules that run under Outlook on your computer. If you're using *C/W Outlook (page 54)* as a client for Exchange, you can create rules that run on the server under Exchange.

Note

In previous versions of Outlook, rules could be used only on Internet messages received from a POP3 server. Outlook 2000 rules can also be used on messages received from an IMAP server.

→ For information about using rules for C/W Outlook used as a client for an Exchange server, **see** "Using Server-Based Rules," **p. 697**.

USING ORGANIZE TO CREATE RULES

Chapter 18 introduced Outlook's Organize capability. That chapter describes how you can use Organize to move existing messages you've received from the Inbox folder to another folder. You can also use Organize to create rules that move new messages to a different folder when those messages arrive.

→ For information about using organize to create rules, **see** "Organizing E-mail Messages," **p. 560**.

CREATING A NEW FOLDER

Before creating a rule to move incoming messages to a folder, that folder must exist. If the folder you want to move messages to doesn't exist, follow these steps to create it.

To create a new folder:

1. With your Inbox Information viewer displayed, choose File, move the pointer onto Folder, and choose New Folder to display the dialog box shown in Figure 22.1.

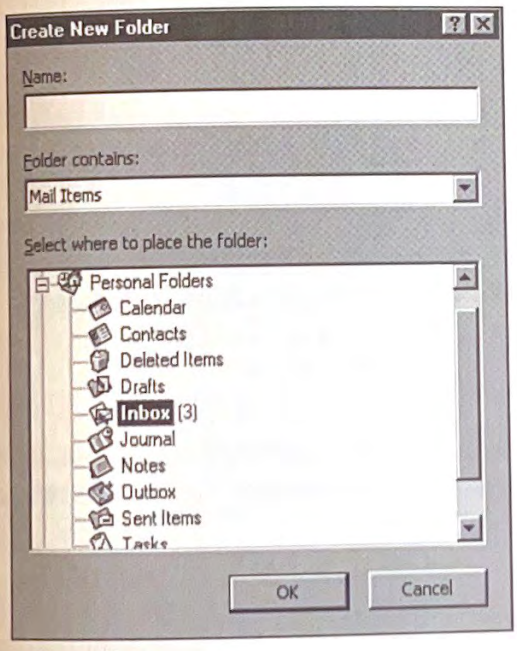


Figure 22.1
Because you started from the Inbox Information viewer, Outlook proposes to create a new folder for Mail Items.

2. Enter a name for the new folder in the Name box. If you intend to use the folder for mail from a certain person, use that person's name as the name for the folder.
3. Use the Select Where to Place the Folder box to identify where the new folder should be placed in your folder structure. Because you started from the Inbox Information viewer, Outlook proposes to place the new folder as a subfolder for the existing Inbox folder.

4. Choose OK. Outlook asks if you want a shortcut to this folder added to the Outlook Bar. You probably don't, so choose No.

→ For more detailed information about creating folders, **see** "Creating Folders and Subfolders," **p. 922**.

Tip #145 from Gordon Padwick

You can, if you like, choose View, Folder List to confirm that the new folder is correctly placed in your folder structure.

CREATING THE RULE

Rules you create in IMO Outlook and in C/W Outlook that's not a client for Exchange always run within Outlook on your computer. In contrast, some rules you create in C/W Outlook that is a client for Exchange run either within Outlook on your computer or within the server. In the case of Outlook used as an Exchange client, Outlook evaluates each rule you create. If the rule can be run in either place, Outlook gives you a choice of running the rule within the client or server.

Here's how you use Organize to create a rule that moves incoming mail to a new folder.

To create a rule that moves incoming messages to a specific folder:

1. With the Inbox Information viewer displayed, choose Organize in the viewer's toolbar to display the Organize pane shown in Figure 22.2.

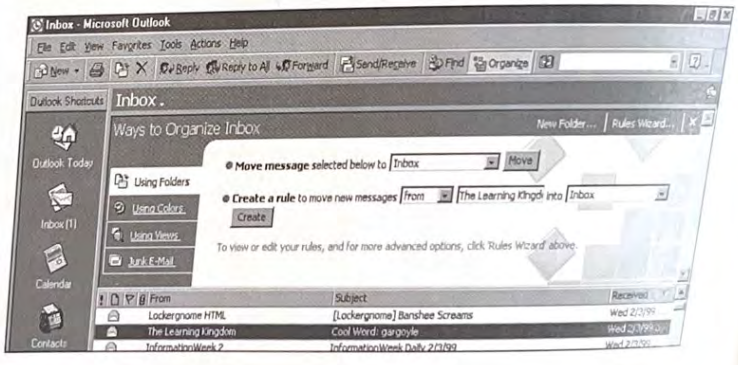


Figure 22.2
The second line in the Organizer pane assumes you want to create a rule based on the names of the sender and recipient of the currently selected e-mail item.

2. The first box in the second line initially contains the word "from." You're creating a rule that applies to messages from someone, so this appropriate.

Note

You can open the drop-down list and select "sent to" if you want to create a rule that affects messages sent to someone.

Oracle Exhibit 1023
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3. The second box in the second line contains the name of the sender of the currently selected message. Replace that name with the name of the sender whose messages you want the rule to apply to. You can enter the name or, if you already have a message from that person, select that message in the message headers listed below the Organize pane.

Tip #146 from

Depending on various factors, a sender's name might not always appear in the same way. For example, you might sometimes see a sender's name in the From box, and at other times see a sender's e-mail address. You must create a separate rule for each way a sender's name appears.

4. Open the drop-down list at the beginning of the third line in the Organize pane to see a list of some of your Outlook folders, as shown in Figure 22.3.

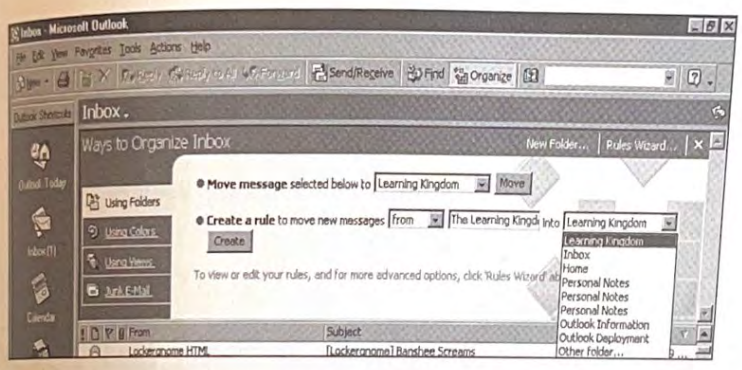


Figure 22.3
The list contains the names of one or more custom folders that you've previously created.

5. If the name of the folder into which you want to move incoming mail is in the list, select that name. If the name of the folder isn't in the list, choose Other Folder to display the Select Folder dialog box that lists all your Outlook folders; select the folder you want to use and choose OK. The name of the selected folder appears in the box at the left end of the third line in the Organize pane.
6. Choose Create in the Organize pane. A message appears stating that the "new rule will be applied to new messages as they are received." The message also asks if you want "to run this rule on the current contents of the folder."
7. Choose Yes if you want the rule to apply to the existing folder contents, or choose No if you want the rule to apply only to new messages. At this point, if you're using C/W Outlook as a client for Exchange and if the new rule could be run either on the client or on the server, Outlook displays the dialog box shown in Figure 22.4. If you're using IMO Outlook or C/W Outlook not as a client for Exchange, you don't see this dialog box, so proceed to step 8.
8. If the dialog box shown in Figure 22.4 does appear, you should normally choose Server so that messages are processed by the rule when you're not running Outlook and when your computer is turned off.

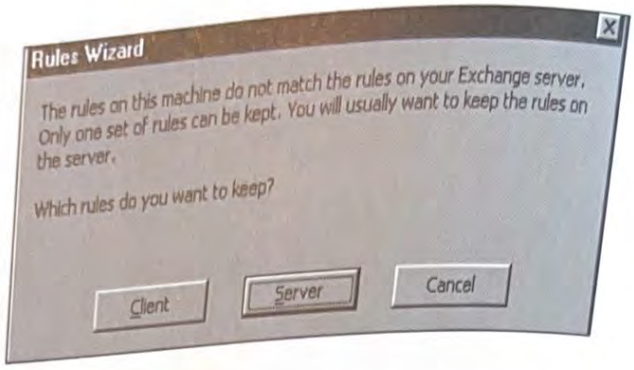


Figure 22.4
This dialog box appears only if you're running Outlook as a client for Exchange and only if the new rule could be run either on the client or on the server.

9. After a short delay, the word Done appears to signify that the rule has been created and will be applied to all incoming messages.
10. Choose X at the top-right corner of the Organize pane, or choose Organize in the Standard toolbar, to close the Organize pane.

After you create a rule in this way, Outlook tests each incoming message to see if it is from the sender you specified in step 3 of the preceding procedure. If the message is from that sender, Outlook immediately moves the message into the folder you specified in step 5. If the message is not from that sender, Outlook saves the incoming message in the usual folder, normally your Inbox folder.

CREATING A RULE TO COLOR MESSAGES

You can use Organize to create rules that make message headers in the Inbox Information viewer appear in various colors according to the sender's or recipient's name. You might, for example, want all messages from your supervisor to show up in red and all messages from important customers to be blue.

Note

You can color message headers in the Sent Items folder or a custom folder that contains messages in the same way.

At the left edge of the Organize pane, choose Using Colors to display the pane shown in Figure 22.5.

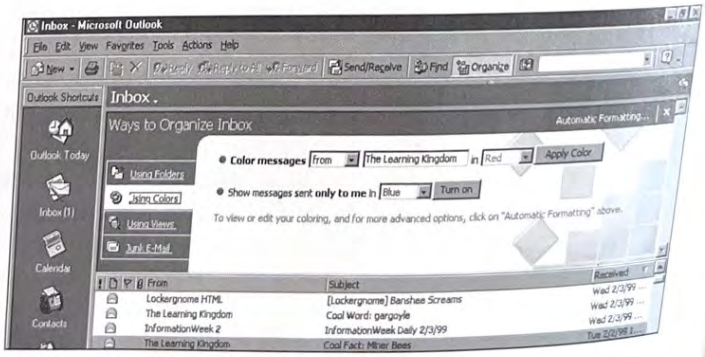


Figure 22.5
Use this pane to color messages from specific people.

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Note The window shown in Figure 22.5 is for C/W Outlook. The corresponding window for IMO Outlook doesn't contain the second line in the Organize pane.

To color message headers:

1. The Organize pane opens with From in the first box in the top line. If you want to color message headers in your Sent Items Information viewer, open the drop-down list and choose Sent To.
2. Enter the name of the person whose messages you want to color in the second box.
3. Open the drop-down list of colors and select the color you want to use.
4. To apply a color to messages already in your Inbox or Sent Items Information viewer, choose Apply Color.
5. In C/W Outlook, if you want to apply a color to messages sent only to you, open the drop-down color list in the second line and choose a color.
6. In C/W Outlook, choose Turn On to apply the rule to future messages you receive or send. A few moments after you do so, the label on the Turn On button changes to Turn Off. Choose that button if you want to turn the rule off.

CHANGING A VIEW

The Using Views button at the left side of the Organize pane has nothing to do with creating rules. It just provides a quick way to change the view in which Outlook displays messages.

→ For detailed information about views, **see** "Using Default Views," **p. 944**.

DEALING WITH JUNK E-MAIL

You can use the Junk E-mail button at the left side of the Organize pane to set up how Outlook automatically processes junk e-mail.

→ For information about automatically dealing with junk e-mail, **see** "Dealing with Junk E-mail," **p. 623**.

CHANGING A RULE

While you can create additional rules in the manner just described, you can't deactivate, delete, or (with one exception) change a rule from the Organize pane. You must use the Rules Wizard to do any of these things. The remainder of this chapter describes how you can use the Rules Wizard.

The exception mentioned in the previous paragraph is this: If you use the Organize pane to create a rule that moves incoming messages from one person to a certain folder, Outlook creates a rule to do that. If you subsequently create a rule to move incoming messages from another person to the same folder, Outlook doesn't create a second rule. Instead, Outlook modifies the existing rule so that incoming messages from one person or the other are moved to the folder. However if you choose a different folder for messages from the second person, Outlook creates a second rule.

USING THE RULES WIZARD TO CREATE RULES THAT MANAGE INCOMING MESSAGES

Normally, Outlook places all the messages you receive in your Inbox folder. If you receive only a few messages each day, that's no problem. However, if you're one of those people who receive many messages each day, you might prefer to organize those messages by having Outlook automatically assign certain types of messages to separate folders.

Tip #147 from



Instead of organizing messages by saving them in different folders, you might prefer to organize messages by assigning categories to them. Subsequently, you can display messages sorted by category.

The next section describes in detail how you create a specific rule. There's more general information about creating rules later in this chapter.

DELIVERING MESSAGES TO FOLDERS AUTOMATICALLY

You can use the Outlook Rules Wizard to create a rule that Outlook uses to place messages that satisfy certain conditions into a custom folder.

Suppose you want Outlook to save all the messages you receive in the future from Jane Rogers in a separate folder. The first step is to create a custom folder for these messages, as described previously in the chapter. Although you don't have to, it helps to keep your folder structure organized if you create custom folders for mail messages as subfolders to your Inbox folder.

→ For information about creating folders, **see** "Creating a New Folder," **p. 619**.

CREATING THE RULE

Here's how you create the rule that automatically moves messages from Jane Rogers into the Jane Rogers folder.

To create the rule:

1. With the Inbox Information viewer displayed, choose Tools, Rules Wizard to display the first Rule Wizard window, as shown in Figure 22.6.
2. Choose New to start creating a new rule. Outlook displays the second wizard window, shown in Figure 22.7.

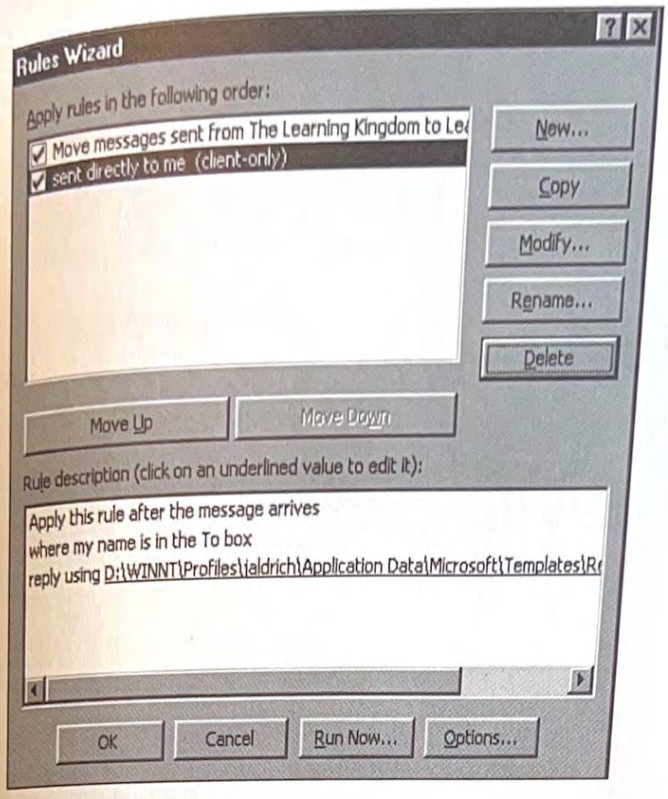


Figure 22.6
The first time you open the Rules Wizard, the two large boxes are empty. Subsequently, these boxes show information about existing rules.

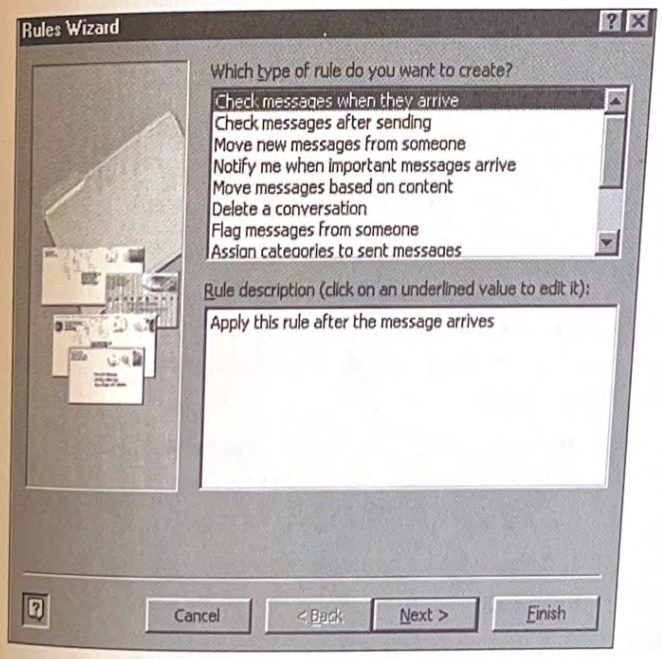


Figure 22.7
The types of rules you can create are listed in the upper box.

3. In the upper box, select Move New Messages from Someone. A description of this rule appears in the lower box, as shown in Figure 22.8.

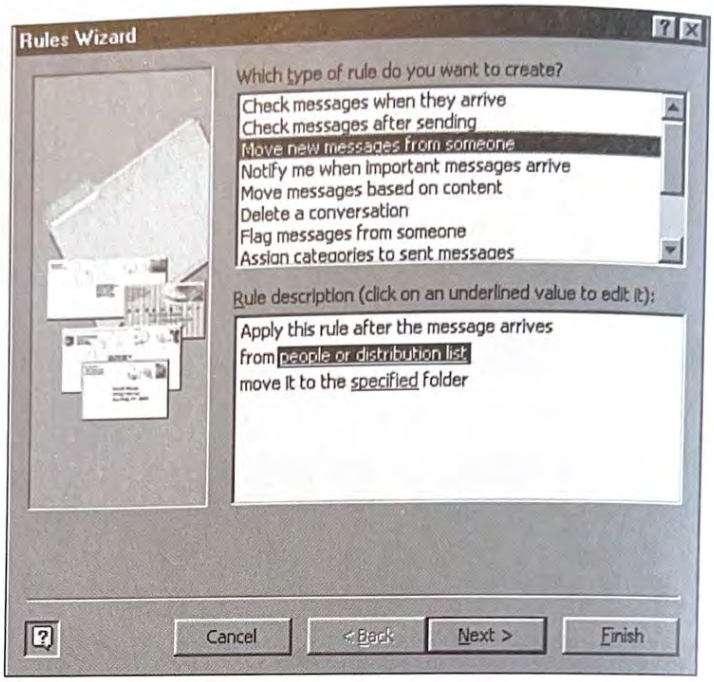


Figure 22.8
The underlined words in the description (they are usually blue on your monitor) require definitions.

Tip #148 from

The colors in which various elements within windows and dialog boxes appear depend on what you select in the Appearance tab of the Display Properties dialog box, accessible from the Windows Control Panel.

4. Choose Next > to display the next wizard window, which displays a list of conditions that must be satisfied for the rule to be applied. Each condition has a check box adjacent to it, as shown in Figure 22.9.
5. Check those conditions that apply. You can check as many as you like. All the checked conditions must be satisfied for the rule to be applied. In this case, the From People or Distribution List is already checked, which is what you want.
6. Click the first underlined words—people or distribution list—in the Rule Description box. Outlook displays the dialog box shown in Figure 22.10.
7. Select one or more people to whom you want the rule to apply (or you can select one or more distribution lists). Then choose From-> to move the selected names into the Specify the Address of the Sender box and choose OK. The name or names you select replace the underlined words in the wizard window.

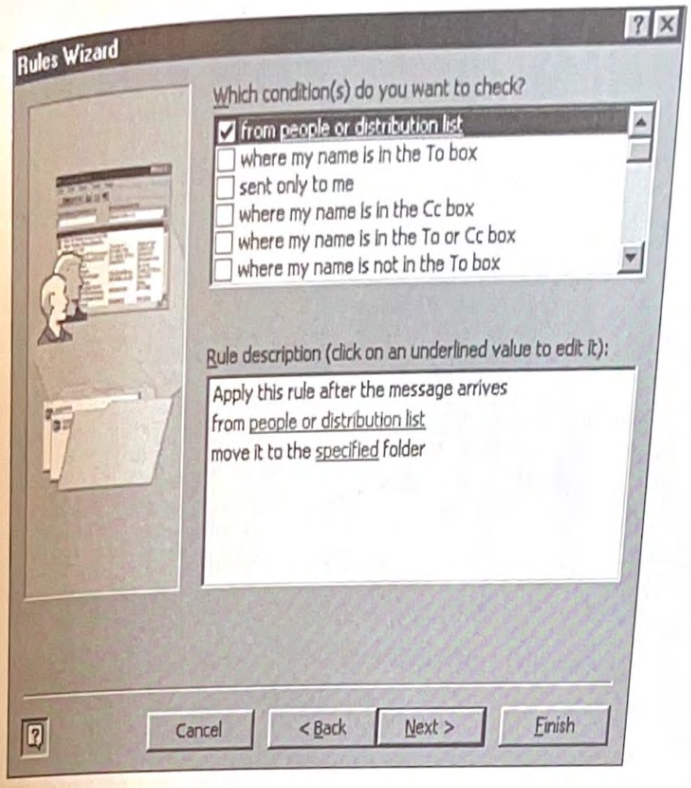


Figure 22.9
You can scroll through the list to see all the available conditions.

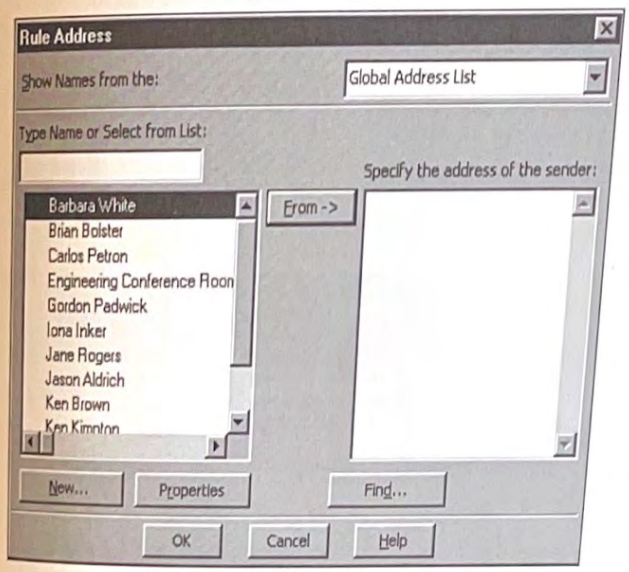


Figure 22.10
This dialog box displays a list of people in one of your address books.

Note

If you're using IMO Outlook, you usually have only one address book, although you can have more than one. If you're using C/W Outlook, you may have several address books, in which case you can choose the address book from which you want to select a name or distribution list.

8. Select the second underlined word or phrase in the lower wizard window—specified in this example. Outlook displays your folder list, as shown in Figure 22.11.

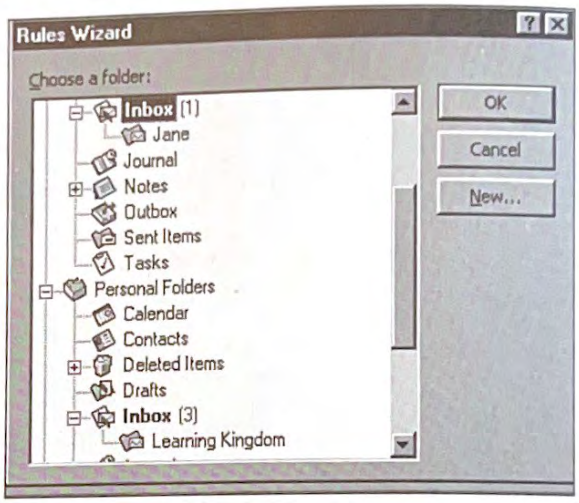


Figure 22.11
You may have to expand the folder list to see the name of a custom folder.

9. Select the folder into which you want Outlook to place items, then choose OK to return to the wizard window, which now looks like that in Figure 22.12.

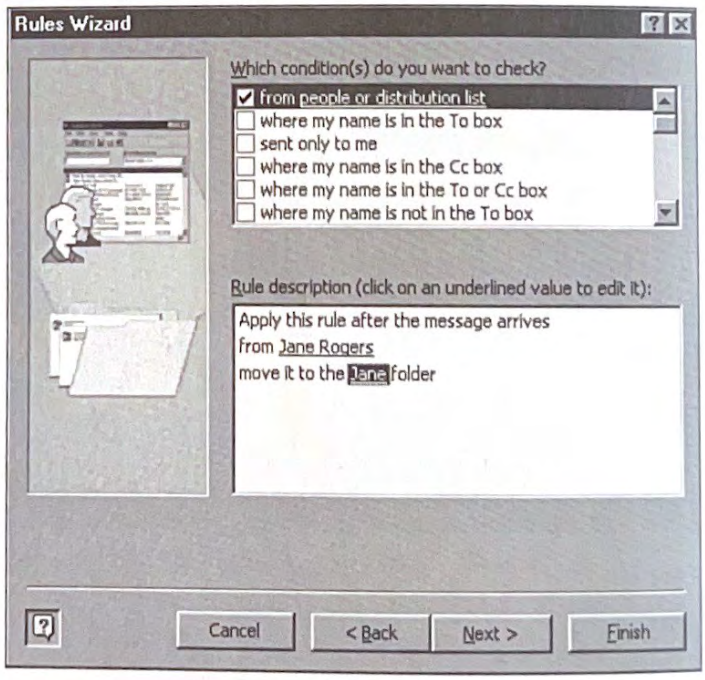


Figure 22.12
Both the original underlined words or phrases in the lower box are replaced with your selections and are now displayed in black.

10. Choose Next > to display the next wizard window, in which you can choose what you want to do with messages that satisfy the conditions you've previously specified.

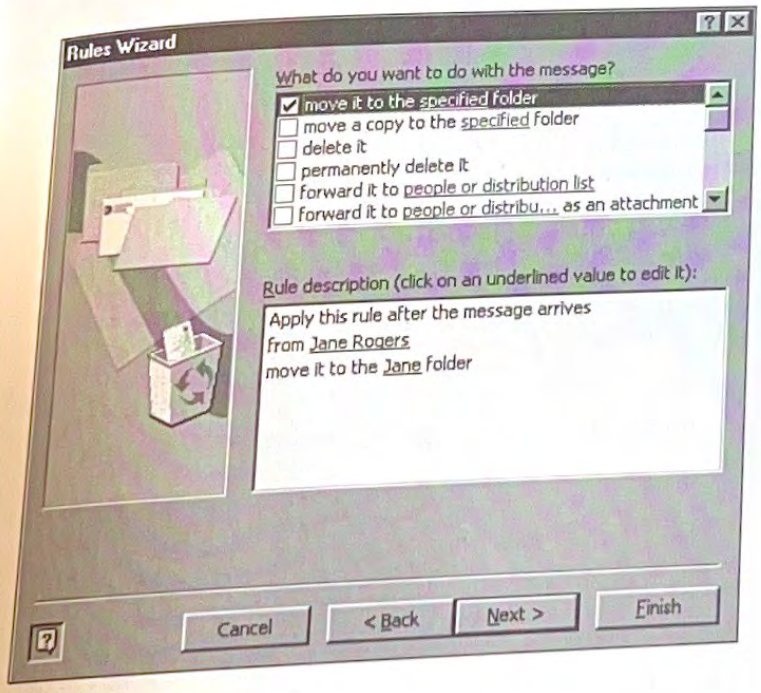


Figure 22.13
This window asks you what you want to do with the message.

11. You probably want to move messages that satisfy the conditions you've specified in previous wizard windows to the folder you've specified. This action is already checked. You can, of course, check other actions.
12. Choose Next > to display the next wizard window, shown in Figure 22.14, in which you can specify exceptions to the rule.

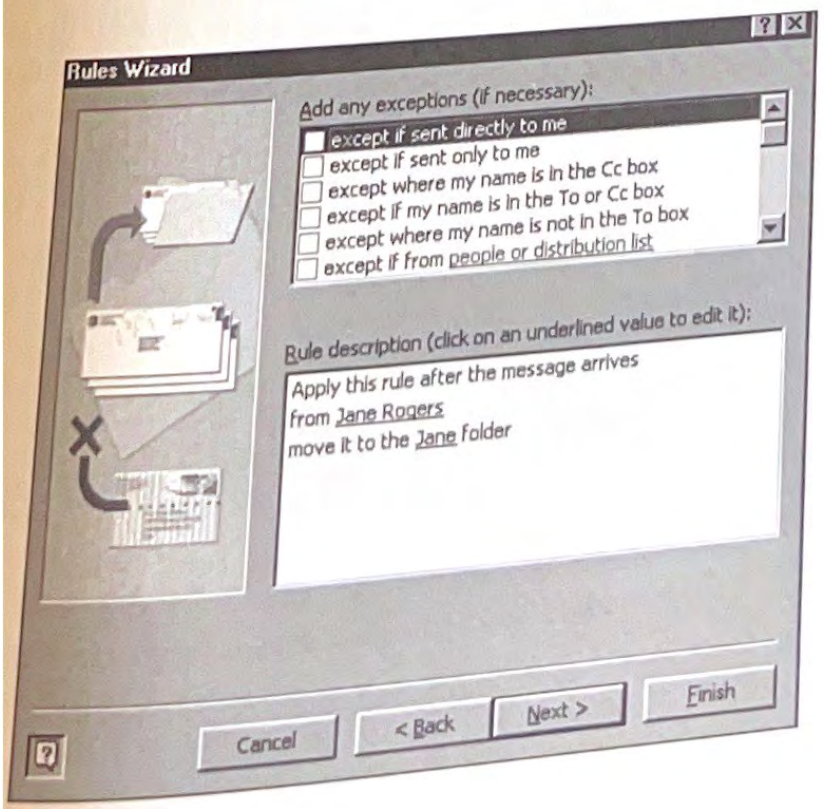


Figure 22.14
Use this window to select exceptions to the rule.

13. You don't have to select any exceptions, but you can check any appropriate exceptions. When you select an exception, a description of that exception is added to the rule description in the lower box. As an example, if you want to make messages marked as high importance exceptions, scroll down the list of exceptions and check Except if It Is Marked as Importance, as shown in Figure 22.15.

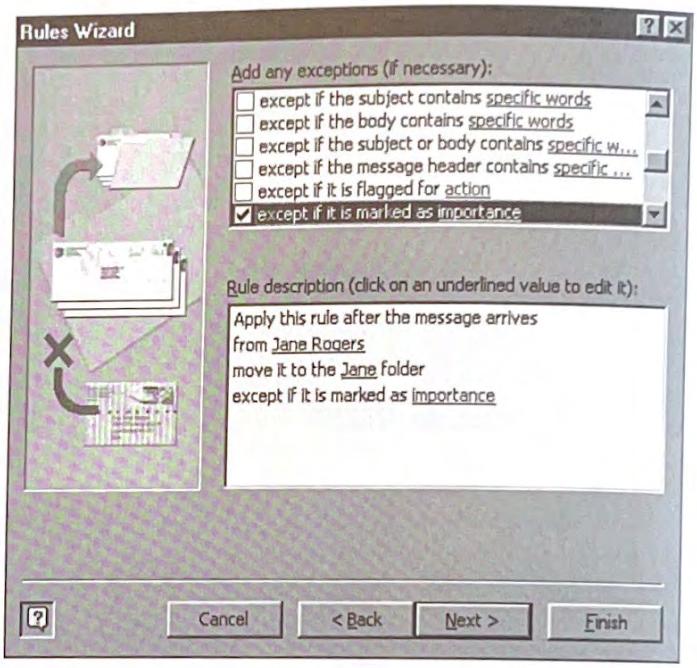


Figure 22.15
Now there's another underlined word (usually colored) in the description of the rule.

14. Click Importance in the lower box. Outlook displays the importance dialog box in which you can select Low, Normal, or High. Choose High, and then choose OK to return to the wizard window. The description now includes the importance you selected, as shown in Figure 22.16.
15. Choose Next > to display the final wizard window in which you supply a name for the rule, as shown in Figure 22.17.
16. Replace the suggested name with something more meaningful.
17. If you want to move messages you've previously received from Jane Rogers into the new folder, check Run This Rule Now on Messages Already in "Inbox."
18. If you want this new rule to begin testing incoming messages immediately, make sure Turn on This Rule is checked.

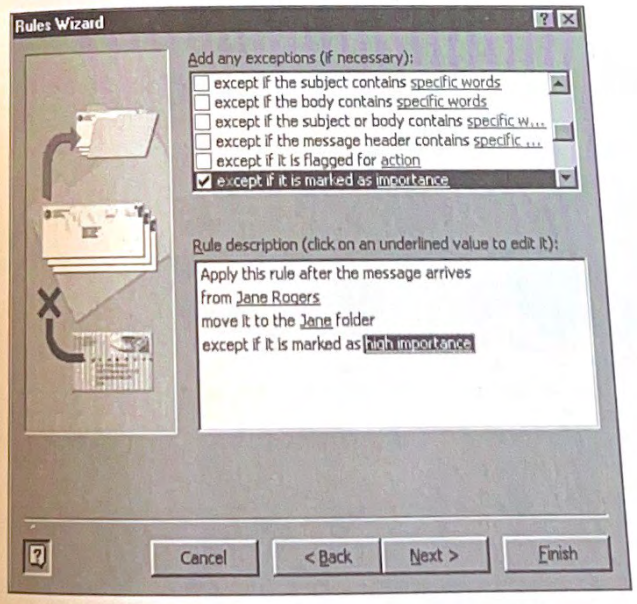


Figure 22.16
The rule description now shows that messages of high importance are excluded.

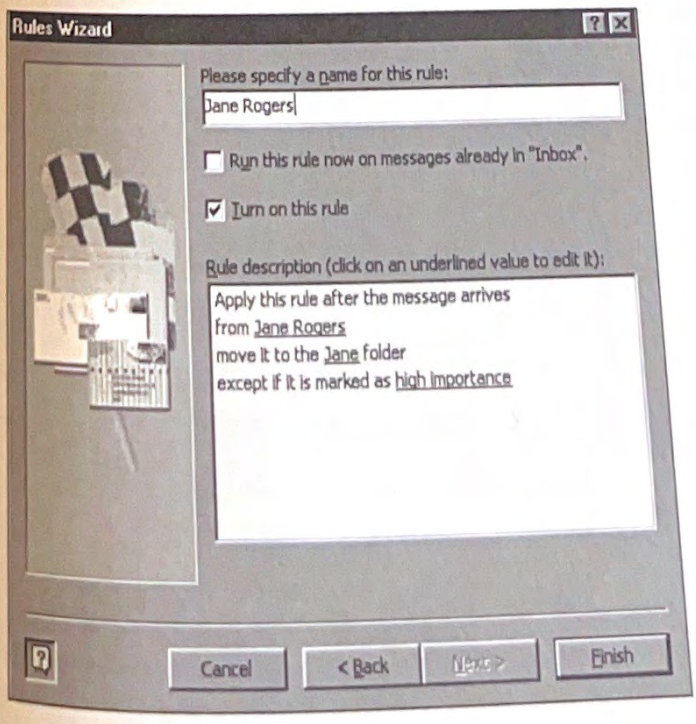


Figure 22.17
Outlook suggests the first replacement you made in the description box as the name for the new rule.

19. Choose Finish. Choose OK to return to the first wizard window that displays the name of the rule and its final description, as shown in Figure 22.18.

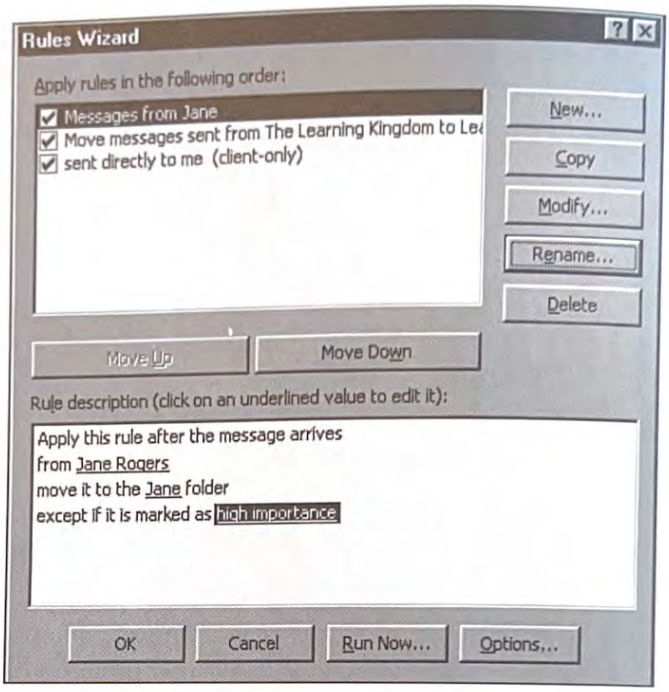


Figure 22.18
This is how the wizard window displays the completed rule.

Notice that the name of the rule appears in the upper box and the name is checked. Being checked, Outlook applies the rule to every message you receive and, if a message satisfies the conditions and doesn't contain anything that satisfies the exclusions, the actions of the rule occur. If you uncheck the rule name, Outlook doesn't apply the rule to incoming messages.

TESTING THE RULE

One way to test a rule is to receive a message that satisfies the rule's conditions and doesn't satisfy the rule's exclusions, and then verify that the actions of the rule occur. In the detailed example described in the preceding section, ask the person whose messages are specified in the rule to send you a message and see what happens. If the rule does what you intend, everything is probably alright. On the other hand, if the rule doesn't do what you intend, you'll have to modify it.

Outlook 2000 offers another way to test a rule—by running it now.

RUNNING A RULE NOW

Normally a rule that applies to incoming messages runs when messages are received. This was the only way to run a rule in Outlook 97 and Outlook 98. Outlook 2000 adds the capability to run a rule now.

Running a rule now means running a rule for messages that already exist in your folders. In the case of a rule that affects incoming messages, this means applying the rule to messages already in your Inbox folder. You can use this to test a rule you've just created and also to apply a new rule to messages that already exist in one of your folders.

Tip #149 from

Of course, if you chose in the final wizard window to apply the rule to existing messages in a folder, you'll be able to see if the rule works without running it now.

The rule described previously in this chapter affected incoming messages from a specific sender. If you already have messages from that sender in your Inbox, you can apply the rule to those messages.

To run a rule now:

1. Choose View, Folder List, and select the folder containing messages you want to use to test the rule.
2. Choose Tools, Rules Wizard to display the Rules Wizard.
3. Choose Run Now to display the dialog box shown in Figure 22.19.

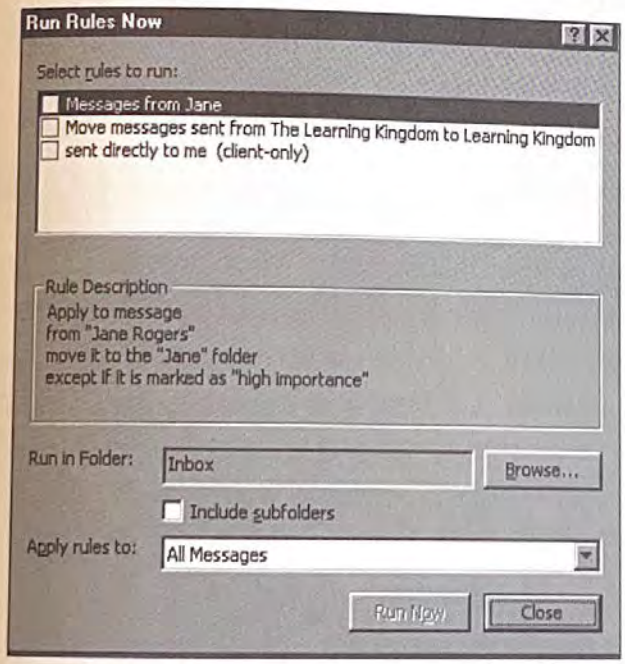


Figure 22.19
This dialog box shows all the available rules.

4. Check the rule you want to test. The Run in Folder box displays the name of the folder that contains the messages you want to use for the test. You can choose Browse to select a different folder.
5. Check Include Subfolders if you want to include messages in the selected folder's subfolders in the test. Usually leave this box unchecked.
6. Open the Apply Rules To drop-down list and select All Messages, Unread Messages, or Read Messages.
7. Choose Run Now to run the rule.
8. Choose Close and then OK to close the dialog boxes.

9. If the folder list isn't already open choose View, Folder List and select the folder into which the rule should have moved messages. You should see the messages that satisfied the rule's conditions in the folder. If that's the case, your rule is working as it should. If that's not the case, you need to make changes to the rule.

MODIFYING A RULE

You can use the Rules Wizard to make changes to an existing rule.

To modify a rule:

1. With any Outlook Information viewer displayed, choose Tools, Rules Wizard to display the first wizard window that shows a list of existing rules.
2. Select the rule you want to modify, then choose Modify to display the wizard window shown previously in Figure 22.6, with the type of rule highlighted.
3. Make whatever changes are necessary by choosing another type of rule in the upper box or by clicking underlined text in the lower box to make different selections. You can choose Next > to progress to subsequent wizard windows to make changes in them.
4. In any wizard window, choose Finish to signify you've finished making changes to the rule.

CREATING OTHER TYPES OF RULES FOR MESSAGES

The preceding example used one example of a rule to explain how rules for incoming messages are created and how they work.

You can use the Rules Wizard to create many types of rules for incoming and outgoing messages. These rules are

- Check Messages When They Arrive
- Check Messages After Sending
- Move New Messages from Someone
- Notify Me When Important Messages Arrive
- Move Messages Based on Content
- Delete a Conversation
- Flag Messages from Someone
- Assign Categories to Sent Messages
- Assign Categories Based on Content
- Move Messages I Sent to Someone
- Stop Processing All Following Rules

When you choose any of these types of rules, a description of that rule appears in the lower wizard window. The descriptions include underlined words or phrases (displayed in blue) that require more information. You can click on the underlined words or phrases to open a dialog box in which you can enter or select the required information.

Far too many combinations of rule types and added information required exist than can be covered individually in this chapter. The preceding example of a rule that applies to incoming messages (and the example later in this chapter of a rule that applies to outgoing messages) should give you the general idea about creating rules, and serve as examples for creating your own rules.

AUTOMATICALLY REPLYING TO MESSAGES

C/W

If you're using C/W Outlook as a client for Exchange, you can create rules that automatically send replies to messages. For example, if you're going to be out of town for a few days, you can create a rule that detects messages from certain people, or about certain subjects, and sends a reply explaining you're away and will reply when you get back. This rule can be created to run on the server, so it works even though your computer is turned off or you've taken it with you.

Note

You can create the same rule to run on IMO Outlook or on C/W Outlook that isn't a client for Exchange. In this case, though, you would have to leave your computer on with Outlook running for the rule to operate.

Outlook uses a *template (page 520)* for the message to be sent as a reply. Your first task, therefore, is to create the message you want sent as a reply and save it as an Outlook template.

→ For information about creating e-mail templates, **see** "Creating an E-mail Template," **p. 520**.

After creating the template, follow these steps to create the rule. Because the steps are similar to those previously described, most of them are described only in outline form.

To create a rule that sends an automatic response to a message:

1. In the first Rules Wizard window, check Check Messages When They Arrive.
2. In the second wizard window, check Where My Name Is in the To Box.
3. In the third wizard window, check Reply Using a Specific Template.
4. In the Description box, select the underlined words A Specific Template. Outlook displays the dialog box shown in Figure 22.20.
5. Open the Look In drop-down list and choose User Templates in System to see a list of the templates you created.
6. Select the message template you want to use for the reply then choose Open to return to the wizard window that now contains the complete file name of the template.
7. Choose Finish to save the rule.

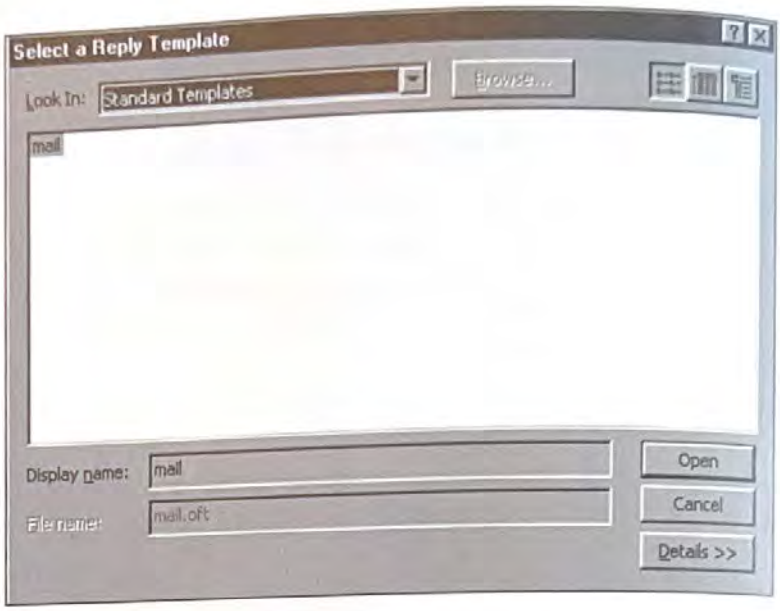


Figure 22.20
This dialog box initially displays your standard templates.

If, while you're away, somebody sends you a message that requests your reply be sent to someone else, the Outlook rule sends the reply to the message sender instead of to the person designated to receive the reply. For detailed information on this point, refer to the Microsoft Knowledge Base article Q186691, *Inbox Assistant Replies to Sender not Alternate Recipient*.

CREATING A RULE BASED ON A MESSAGE

Instead of creating a rule from scratch, as described previously in this chapter, you can create a rule based on some of the information in a message you've received. For example, you may want to create a rule that applies to future messages you receive from a specific sender.

To create a rule based on a message you've received:

1. In the Inbox Information viewer, double-click a message from the person for whom you want to create a new rule to display that message in a Message form.
2. In the form's menu bar, choose Actions, Create Rule. Outlook displays the first Rules Wizard window, as shown in Figure 22.21.

The first four conditions offered by the wizard are based on

- Who sent the message
- Who the message was addressed to
- The subject of the message

You can use these conditions, or the others available, to create a rule.

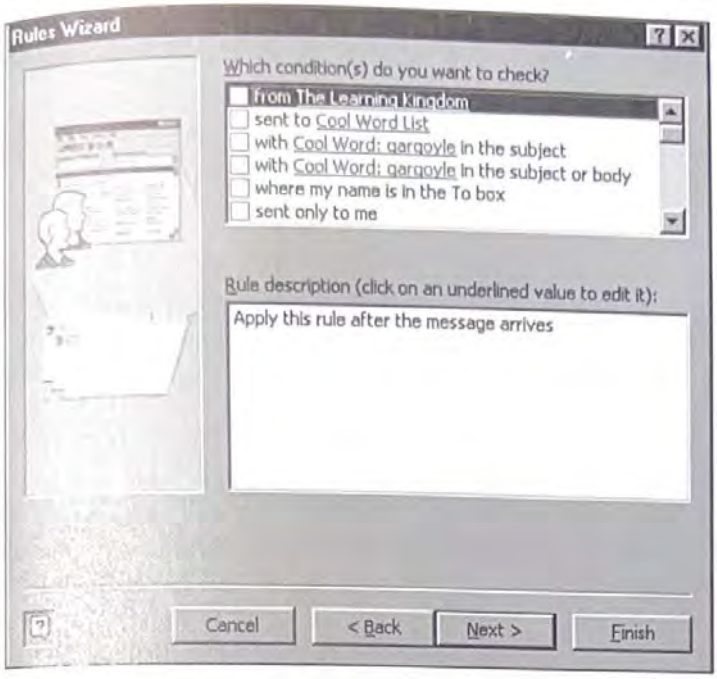


Figure 22.21
This wizard window contains some conditions based on the message.

CREATING RULES FOR OUTGOING MESSAGES

The process of creating rules to be applied to messages you send is the same as creating rules to be applied to incoming messages. The most frequently used rule of this type is one that saves copies of certain messages you send in a folder other than the usual Sent Items folder.

The following steps describe the creation of a rule that saves messages in which a specific word or phrase appears in the subject of the message into a folder other than the Inbox folder. Because the details of creating such a rule are the same as those described previously in this chapter, the following steps merely outline the procedure.

To create a rule that saves copies of messages you send in a specific folder:

1. In the first Rules Wizard window, choose Move Messages I Send to Someone.
2. In the second wizard window, choose a condition such as With Specific Words in the Subject.
3. Choose the underlined words in the Description box and replace those words with explicit words or phrases.
4. Choose Next and then define any exceptions to the rule.
5. Choose Next and then enter a name for the rule.
6. Choose Finish.

MANAGING RULES

The Rules Wizard automatically saves the rules you create in a file with the file name extension .rwz. If you're using IMO Outlook, this file is Microsoft Outlook Internet Settings.rwz; if you're using C/W Outlook, this file has the name of your profile as its file name.

Outlook imposes a maximum size of 32 kB for the rules you save. The size of each rule varies according to its complexity. You can typically save between 40 and 50 rules. If you attempt to save a rule when no more space for rules is available, Outlook displays a message telling you "Changes to the rule could not be saved. There is not enough memory or the rules are too complex. Try deleting some rules."

RENAMING A RULE

You can easily rename a rule. To do so, display the first Rules Wizard window, shown previously in Figure 22.6. Select the rule you want to rename, then choose Rename to display the dialog box shown in Figure 22.22.

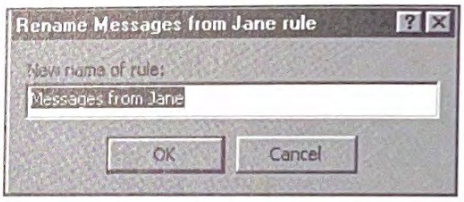


Figure 22.22
The current name of the selected rule is displayed in the New Name of Rule box.

Edit the current name.

COPYING A RULE

A convenient way to create a new rule that's similar to an existing one is to copy the existing rule. To do so, display the first Rules Wizard window, shown previously in Figure 22.6. Select the rule you want to copy, then choose Copy. Outlook adds the copied rule to the list of rules. The copy has a name starting with "Copy of" followed by the name of the rule that was copied. Choose Rename to change the name to something more appropriate.

You can make changes to the rule's actions, conditions, and exceptions in much the same way you create a new rule. You can select any of the underlined words and phrases in the Rule Description box to make changes.

DELETING A RULE

To delete a rule, select it in the first Rules Wizard window, then choose Delete. Outlook displays a dialog box in which you are asked to confirm the deletion. Choose Yes.

REORDERING RULES

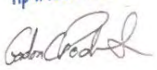
Outlook applies rules to messages in the order those rules are listed in the Rules Wizard. In the case of incoming messages, Outlook applies rules to messages as they arrive in your Inbox folder. If a rule moves a message from the Inbox folder to another folder, rules are no longer applied to that message. In the case of an Outgoing message, Outlook applies rules to messages as they arrive in the Sent Items folder.

To change the order in which rules are applied to messages, display the list of rules in the first Rules Wizard window. Select a rule you want to move up or down in the list and then choose Move Up or Move Down.

EXPORTING AND IMPORTING RULES

You can export a set of rules to a file, and you can import a set of rules from a file.

Tip #150 from



To copy a set of rules from one computer to another, export the rules from the first computer then import those rules into the second computer. You can import rules from a computer running Outlook 98, but you can't import rules from Outlook 97.

To export a set of rules:

1. Choose Options in the first Rules Wizard window to display the dialog box shown in Figure 22.23.

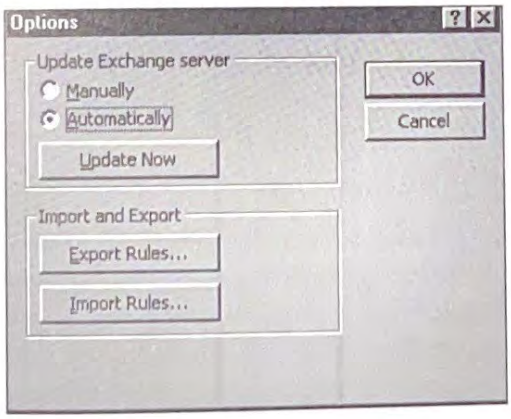


Figure 22.23
Use this dialog box to export or import a set of rules.

Note

The dialog box shown here is what you see if you're using C/W Outlook as a client for Exchange. If you're using C/W Outlook and don't have the Microsoft Exchange Server information service in your profile, or if you're using IMO Outlook, a smaller dialog box containing only the Export Rules and Import Rules button is displayed.

2. Choose Export Rules to display the dialog box shown in Figure 22.24.

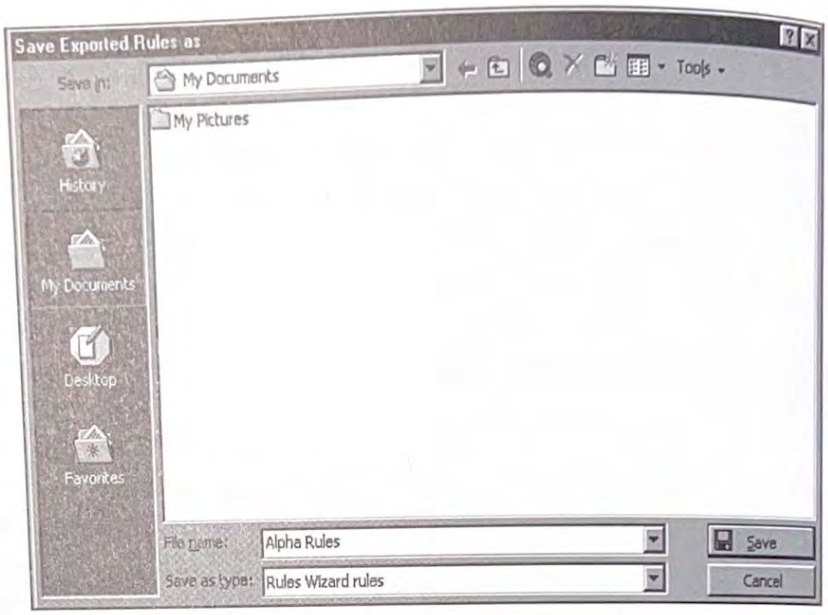


Figure 22.24
Outlook proposes to save the exported rules in a file named Untitled.rwz. The dialog box is shown here after the name Outlook proposes has been changed.

3. Navigate to the Windows folder in which you want to save the rules.
4. Change the name of the file that will be created to something meaningful (Outlook automatically supplies .rwz as the file name extension) and choose OK to save the file.

Use similar steps to import rules from a file. In this case, choose Import Rules in the Options dialog box to display the Import Rules From dialog box. Navigate to the Windows folder that contains the file to be imported, select the file, and choose Open.

CREATING CONDITIONAL RULES

If you create several rules, Outlook normally executes the rules in the order they're listed in the Apply Rules in the Following Order box, such as in the example previously shown in Figure 22.18. You can also create a set of rules in such a way that one rule executes under certain conditions and a different rule executes under other conditions. For example, you might want to create rules that:

- Copy all messages addressed directly to you into a specific folder
- Copy all messages that have specific Subject text to a different folder

You can do this by using Stop Processing More Rules, as described in the following procedure.

To create conditional rules that move messages addressed to you into a folder named Personal Messages and other messages that contain "Alpha" in the subject box to a folder named Alpha Messages:

1. If the folders into which you want to move incoming mail messages don't already exist, create them. The remaining steps assume you named the two folders Personal Messages and Alpha Messages.

→ For information about creating new folders, **see** "Creating Folders and Subfolders," **P. 922**.

2. Choose Tools, Rules Wizard to display the first Rules Wizard dialog box shown previously in Figure 22.18.
3. Choose New to display the second wizard window.
4. In the Which Type of Rule Do You Want to Create list, select Check Messages When They Arrive, then choose Next > to display the next wizard window.
5. Check Where My Name Is in the To Box, then choose Next > to display the next wizard window.
6. Check Move a Copy to the Specified Folder then select the underlined word "Specified" in the Rule Description box to display the dialog box in which you can select a folder.
7. Select the folder into which you want messages addressed to you moved (Personal Messages in this case), then choose OK to return to the wizard window in which the Rule Description box now contains the name of the folder you selected.
8. Scroll down to the bottom of the What Do You Want to Do with the Message box and check Stop Processing More Rules.

Note

At this point, the Rule Description box contains this description of your rule:

Apply this rule after the message arrives
where my name is in the To box
move a copy to the Personal Messages folder
and stop processing more rules

9. Choose Next > to display the next wizard window. You probably don't want any exceptions, so choose Next > to display the final wizard window.
10. Enter an appropriate name for the rule (such as Messages to Me), then choose Finish. That completes creating the first rule. You can see its name listed in the first Rules Wizard window.
11. Choose New to begin creating the second rule that will move messages with "Alpha" in the subject into the Alpha Messages folder.
12. Select Check Messages When They Arrive, then choose Next >.
13. Select the condition With Specific Words in the Subject.
14. Select the underlined words "Specific Words" in the Rule Description box to display

the Search Text dialog box. Enter "Alpha" in the Add New box, then choose Add. The word you entered is now listed in the Search List box. Choose OK to return to the wizard window in which the Rule Description box contains the word you just specified. Choose Next > to display the next wizard window.

15. Select Move a Copy to the Specified Folder, then select the underlined word "Specified" in the Rule Description box. Select the folder into which you want to move Alpha messages (as previously described in step 7) then choose OK to return to the wizard window. Choose Next > to open the next wizard window.
16. Select any exceptions to the rule in this window, then choose Next > to open the final wizard window.
17. Enter a name for the rule (such as Alpha Messages), then choose Finish. The two rules are now listed in the first Rules Wizard window.

You haven't quite finished yet. The Rules Wizard automatically lists rules in alphabetical order by the name you give them. If you've followed the previous procedure, you'll have two rules: Alpha Messages followed by Messages to Me. If you leave the messages listed in this way, Outlook will process the Alpha Messages rule first and then the Messages to Me rule.

At this point, you have to consider what you want to happen to a message that's addressed to you and has Alpha in its subject. As things stand now, the first rule copies such a message to the Alpha Messages folder, leaving the original message in your Inbox bolder. Then, the second rule runs, copying the message into your Personal Messages folder. You now have copies of the message in the Alpha Messages folder and in the Personal Messages folder.

If you change the order of the two rules so that the Messages to Me rule runs first, the result is different. The Messages to Me rule makes a copy of the message in your Personal Messages folder but the Alpha Messages rule doesn't run (due to Stop Processing More Rules in the Messages to Me rule). So, you only have a copy of the message in your Personal Messages folder.

Before leaving this subject, let's consider one more possibility. If you had included Stop Process More Rules in the Alpha Messages rule and that rule is processed first, a message addressed to you with Alpha in its Subject would be copied only to the Alpha Messages folder.

→ For information about changing the order of rules, **see** "Reordering Rules," **p. 639**.

Note

Although it might take some head scratching, you can set up quite complex rule processing, much like the If and Case constructs you'll be familiar with if you've done any programming. When you enable two or more conditions within a rule, all those conditions must be satisfied for the rule to run. If you want the rule to run if any one of several conditions is satisfied, you must place each condition in a separate rule. Use Stop Processing More Rules in specific rules, as described in this section, to prevent subsequent rules running.

Plan ahead before you start creating a set of conditional rules. One way to do that is to create a diagram of what you want to achieve. Then you can base the design of individual rules on that diagram.

DEALING WITH JUNK MAIL

If you use Outlook to receive Internet e-mail, you probably receive a lot of junk mail that you'd rather not have to bother with. Outlook contains a built-in filter you can turn on so that messages containing certain words and phrases in the subject or body are ignored. If you don't turn the filter on, messages containing these words and phrases are handled normally.

To see the list of words and phrases that Outlook looks for, open the file named Filters.txt. This file is usually in the same Windows folder as Outlook. The easiest way to find it is to use the Windows Find command or, from within Outlook, choose Tools, Advanced Find. Double-click the file name to open it in Windows Notepad or another text editor.

Note

The purpose of opening Filters.txt is to see what words and phrases Outlook uses to identify junk mail. Don't attempt to edit this file.

TURNING ON JUNK MAIL FILTERS

With the Inbox Information viewer displayed, choose Organizer in the Standard toolbar. At the left side of the Organizer pane, choose Junk E-mail to display the pane shown in Figure 22.25.

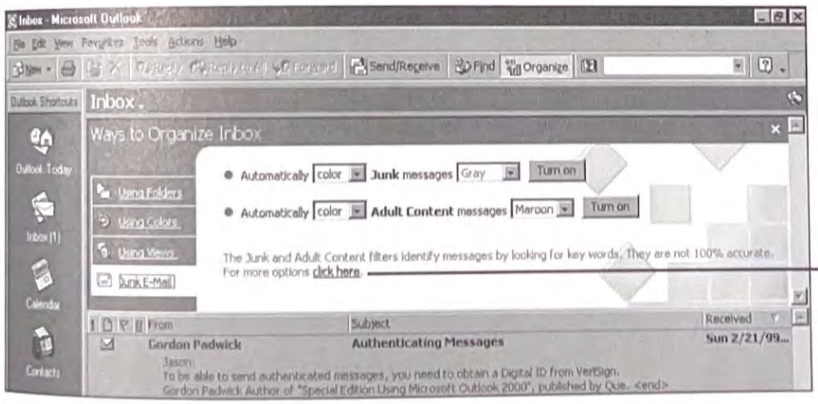


Figure 22.25
Use this pane to define how you want Outlook to handle junk e-mail.

If you looked at the contents of the Filters.txt file previously mentioned, you saw that the file lists two types of unwanted mail: Junk and Adult Content. You can determine how you want Outlook to handle these two types of mail. For each type, you can tell Outlook to

- Color or move the mail
- If you choose to move it, which folder to move it to

Make these selections by opening the drop-down lists in the pane and selecting from them.

After you've made your selections, choose Turn On to turn the filters on. After you choose Turn On, the button labels change to Turn Off. Choose the Turn Off buttons to turn the filters off.

Tip #151 from



I suggest you initially choose to color Junk and Adult Content messages. Use Outlook that way for a few days to see which type of messages Outlook detects. After that, if you're satisfied, you might prefer to have Outlook automatically send Junk and Adult Content messages to a Junk E-mail folder that Outlook automatically creates.

ADDING A SENDER TO THE JUNK OR ADULT CONTENT LIST

To add the name of a sender to the Junk or Adult Content lists, right-click a message from that sender in the Inbox Information viewer to display a context menu. Move the pointer onto Junk E-mail and choose either Add to Junk Senders List or Add to Adult Content Senders List. Outlook displays a message confirming that the selected name has been added to the list you chose.

You can also add names to the Junk and Adult Content lists, and remove names you previously added by displaying another view of the Organize pane. To display this view, choose Click Here in the pane shown previously in Figure 22.22. The new view is shown in Figure 22.26.

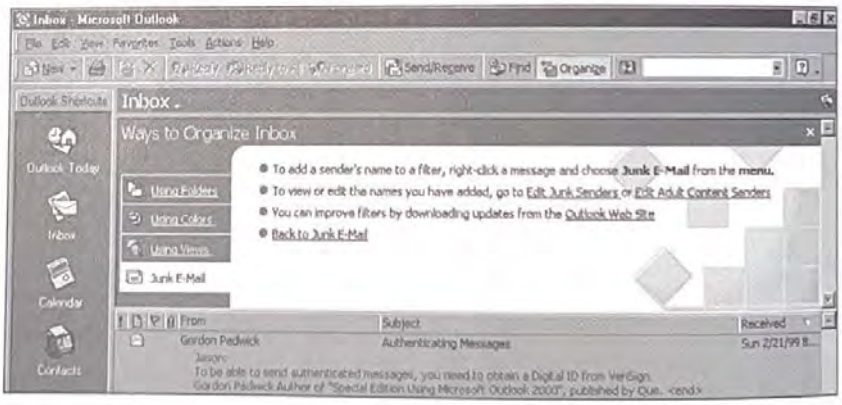


Figure 22.26
Use this pane if you want to edit your lists of junk and adult content mail senders.

Choose Edit Junk Senders to display the dialog box shown in Figure 22.27. Choose Edit Adult Content Senders to display a similar dialog box.

The pane shown previously in Figure 22.26 invites you to visit Microsoft's Outlook Web site to download improved filters. At the time this book was written, the only improved filters offered was Omron's MailJail. One of these is MailJail Lite for Outlook 98. Perhaps a version for Outlook 2000 will become available.

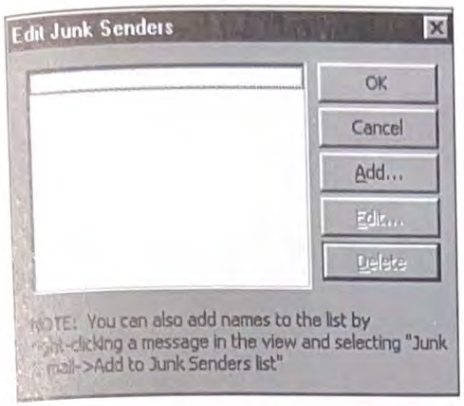


Figure 22.27
You can use this dialog box to add or delete senders, or to edit existing senders. The dialog box is shown here with no junk senders identified.

IMPROVING HOW OUTLOOK HANDLES JUNK E-MAIL

So far, you've learned how to use the Organize pane to set up Outlook so that it detects junk e-mail. You can gain more control over this by using the Rules Wizard to create a customized rule.

→ For information about using the Rules Wizard to create rules, **see** "Using the Rules Wizard to Create Rules That Manage Incoming Messages," **p. 624**.

To create a customized rule that handles junk e-mail:

1. Choose Tools, Rules Wizard to open the Rules Wizard.
2. In the first wizard window, choose New.
3. In the second wizard window, select Check Messages When They Arrive.
4. In the third wizard window, select Suspected to Be Junk E-mail or from Junk Senders.
5. Choose 'Junk Senders'. Outlook displays the Edit Junk Senders dialog box.
6. Use the Edit Junk Senders dialog box to add senders to your list, or to edit or delete existing senders.
7. In the fourth wizard window, select what you want Outlook to do when it detects suspected junk e-mail. You'll probably want to select Move It to a Specified Folder.
8. Choose Specified. Outlook displays a dialog box that lists your folders. Select the folder into which you want Outlook to move suspected junk e-mail.
9. In the fifth wizard window, select any exceptions to the new rule.
10. In the sixth wizard window, name the new rule and make sure it's turned on.
11. Choose Finish to return to the first wizard window that lists the new rule.

You can follow an almost identical procedure to create a customized rule for detecting messages that contain suspected adult content.

CREATING RULES WITH OR CONDITIONS

Most of the rules you create by using the Rules Wizard test for only one condition such as:

- Where My Name Is in the To Box
- Sent Only to Me

However, if you examine the list of conditions offered by the Rules Wizard, you'll find some that contain the word "or." You can use these conditions to test for one thing or the other. Some examples of these are

- From People or Distribution List
- Suspected to Be Junk E-mail or from Junk Senders

TROUBLESHOOTING RULES

If you're careful while you go through the steps of the Rules Wizard, you'll probably find that your individual rules work. But, if a rule doesn't work as you intend, it's probably because you made an incorrect selection or supplied invalid information. The only solution to this is to carefully examine each Rules Wizard window and make the necessary corrections.

After you've created several rules, those rules are listed in the first Rules Wizard window. Outlook runs those rules that are checked in the order they are listed. If you run into trouble with processing rules, the first step is to make sure that each rule works individually. You can do that by having only one rule checked at a time.

When you're satisfied that each rule runs as intended by itself, consider the order of the rules. One common problem is that a rule may move an incoming message to a folder other than the folder on which the rules operate. If this happens, subsequent rules won't operate on the message that's been moved.

You may be able to correct a problem with multiple rules by changing their order. To do this, display the list of rules in the Rules Wizard, select a rule you want to move, and then choose the Move Up or Move Down button.

The most difficult rule problems to solve are those that can (and do) occur if you're using Stop Processing More Rules to create conditional rule processing.

→ For information about Stop Processing More Rules, **see** "Creating Conditional Rules," **p. 640**.

You may well find that a set of conditional rules work fine most of the time but, under some circumstances, don't do what you intend. Welcome to the world of computer programming! Only systematic analysis can solve these types of problems. One technique is to create a diagram (programmers call it a flow chart) that illustrates how you want your rules to work. Having done that, examine the details of each rule to check that each one is constructed properly.

CHAPTER 26

USING EXCHANGE SERVER FOR E-MAIL

by Gordon Padwick

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USING OUTLOOK AS A CLIENT FOR EXCHANGE

C/W

This chapter is about sending and receiving e-mail messages between people who use Outlook as clients for an Exchange server. The subjects covered here are only relevant to people who have *C/W Outlook (page 54)* installed and have an e-mail account on an Exchange server.

SETTING UP OUTLOOK AS AN EXCHANGE CLIENT

To use Outlook as an Exchange client, you must have C/W Outlook installed on your computer, have the Microsoft Exchange Server information service in your profile, have a LAN connection to a server on which Exchange Server is installed, and have an e-mail account on that Exchange Server.

To check whether you have C/W Outlook installed on your computer, with Outlook running, choose Help, About Microsoft Outlook to display a dialog box similar to the one shown in Figure 26.1.

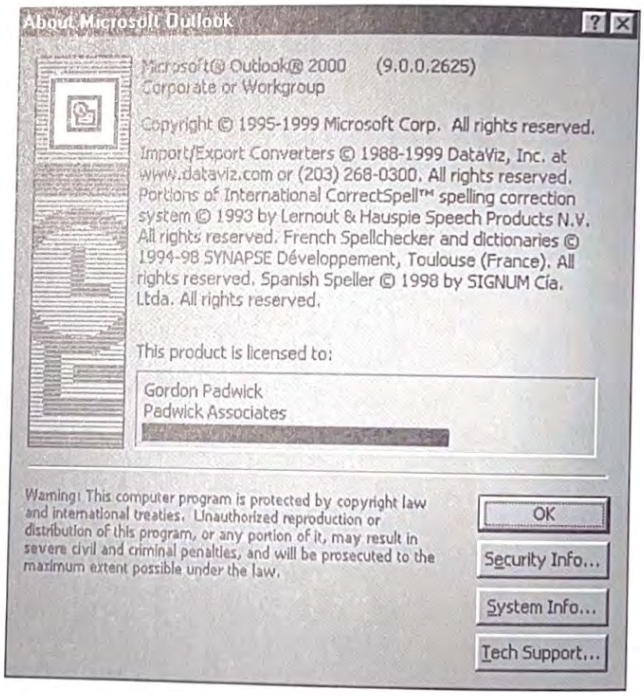


Figure 26.1
The second line in this dialog box contains the phrase "Corporate or Workgroup" if you have C/W Outlook installed.

If you have IMO Outlook installed, you can't usually access Exchange Server. You'll have to change your Outlook service option.

Note

If your Exchange server has the IMAP service installed, you can use an IMO Outlook IMAP account to access Exchange server's e-mail services. See "Changing from One Service Option to Another," in Appendix A.

To check whether you have the Microsoft Exchange Server information service in your profile, choose Tools, Services to display the dialog box shown in Figure 26.2.

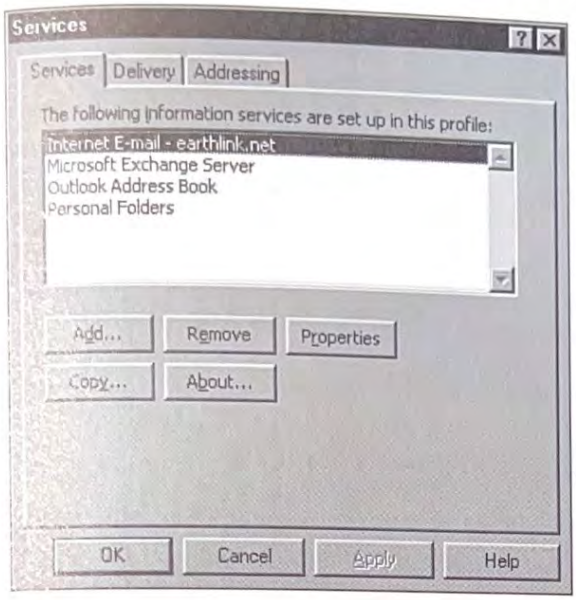


Figure 26.2
The list of information services should include Microsoft Exchange Server.

→ If Microsoft Exchange Server isn't listed, you'll have to add that information service to your profile. **See "Adding the Exchange Server Information Service to a Profile," p. 655.**

The subjects of connecting to a LAN and setting up e-mail accounts on Exchange Server are beyond the scope of this book.

Tip #159 from

If you need to set up e-mail accounts for your Exchange Server, I suggest picking up a copy of *Special Edition Using Microsoft Exchange Server 5.5*, published by Que.

SELECTING A STORAGE LOCATION

If you use IMO Outlook, or C/W Outlook without connectivity to Exchange Server, Outlook stores your e-mail and all other Outlook items in a Personal Folders file on your hard drive. However, if you use C/W Outlook with connectivity to Exchange Server, you can choose from three places to store your e-mail and other Outlook items:

- A Personal Folders file on your local hard drive
- The Exchange Server information store
- An Offline Folders file on your local hard drive

This chapter assumes that you're using a computer that's permanently connected to Exchange Server, so the chapter considers only the first two places where you can save Outlook items.

→ If you need to work with offline folders, **see** "Understanding Offline Folders," **p. 731**.

You should keep your Outlook items in the Exchange Server information store in order to take advantage of Exchange Server's capabilities. If you and other Outlook users do that, you can easily share such information as Calendar and Contact items, and be able to replicate your offline folders with the information store. The downside of doing that is each time you work with Outlook items you create traffic on the LAN. If you have a reliable, high-performance LAN, you should keep your Outlook items in the Exchange Server information store. Only if you experience LAN problems should you consider saving Outlook items locally.

Note

The decision about where you save Outlook items is usually made by the Exchange administrator.

FINDING OUT WHERE OUTLOOK ITEMS ARE SAVED

You can easily see where Outlook items are stored. With any Outlook Information viewer displayed, choose View, Folder List to display the list of folders. If the only place you have available for saving Outlook items is the Exchange store, you'll see a list of folders such as that shown in Figure 26.3.

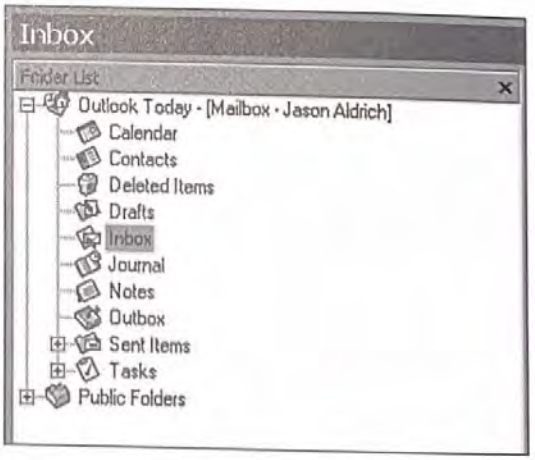


Figure 26.3
The top-level folder in this case is named Outlook Today – {mailbox – Jason Aldrich}. The word "mailbox" in this name indicates that your Outlook items are saved in an Exchange mailbox.

The name Jason Aldrich is the name of the fictitious person who owns the mailbox. In your case, your own name or pseudonym is there instead of Jason Aldrich.

Note

This list shows two top-level folders. The one with the name that starts with the words "Outlook Today" contains your Outlook items. Public Folders is an area of the Exchange store you can use to share information with other people. See Chapter 27, "Using Exchange Server to Share Information."

If you have a mailbox on an Exchange server and a Personal Folders file in your local disk, the folder list looks something like that shown in Figure 26.4.

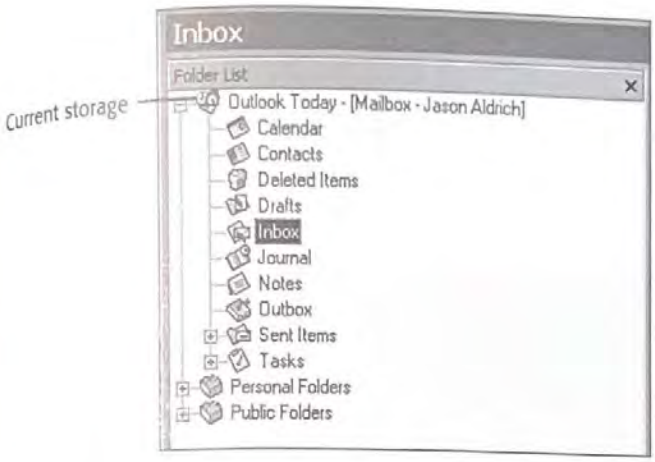


Figure 26.4
This folder list has an additional top-level folder named Personal Folders.

In this case, you can select either your mailbox on the Exchange server or your Personal Folders file on your local disk as the place to save your Outlook items. Outlook can save items in one or the other.

Note

You can access more than one Personal Folders file and more than one mailbox on the Exchange Server from a single profile.

The place where Outlook currently saves your Outlook items is indicated in two ways:

- By the image of a house superimposed over a top-level folder icon
- By the words "Outlook Today" at the beginning of a top-level folder's name

CHANGING WHERE OUTLOOK ITEMS ARE STORED

Use these steps to change where Outlook saves items.

To select where Outlook saves items:

1. With any Outlook Information viewer displayed, choose Tools, Services to display the Services dialog box. Select the Delivery tab, shown in Figure 26.5.
2. Open the drop-down Deliver New Mail to the Following Location list to display a list of available locations.

Note

Although the name of the box refers specifically to mail, Outlook uses the same location for all items.

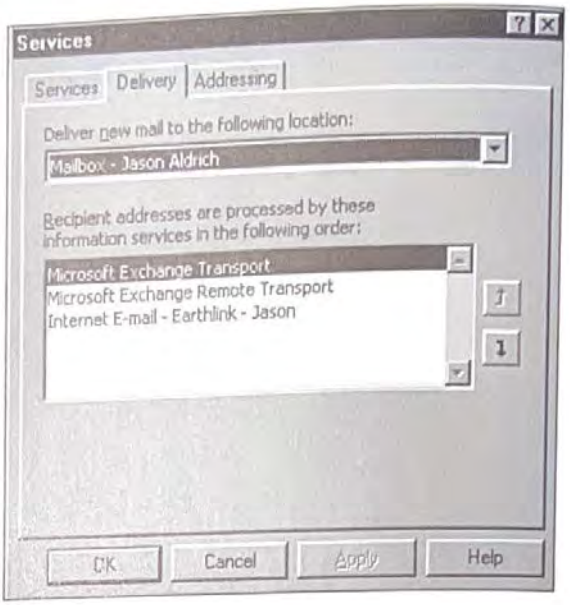


Figure 26.5
The Delivery tab shows where Outlook items are currently saved, the Exchange store in this case.

3. Select the location in which you want to save Outlook items. Select a location that has a name starting with "Mailbox" to save Outlook items in the Exchange store; select the name of a Personal Folders file to save Outlook items on your local hard drive.
4. Choose OK to close the dialog box. The new delivery location doesn't take effect until you choose File, Exit and Log Off to close Outlook and then restart it.

Tip #160 from



Outlook doesn't tell you that you must close and restart Outlook before the new delivery location takes effect. However, that step is necessary.

After you restart Outlook, the folder list looks like the one in Figure 26.6.

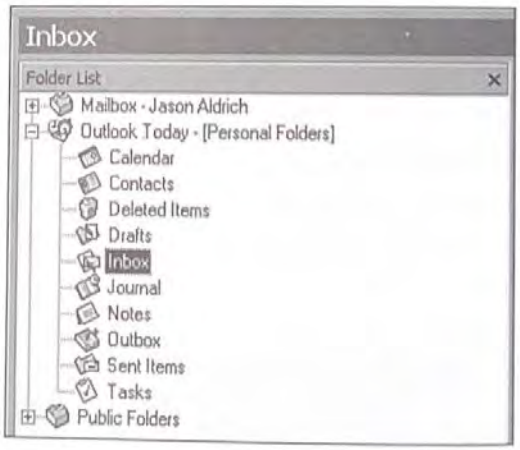


Figure 26.6
Now, the house image and the words "Outlook Today" indicate that the location in which Outlook saves items is the Personal Folders file.

If you want to use the Exchange server's store to save Outlook items, you must have that selected. The remainder of this chapter assumes that you're using the Exchange store.

COPYING ITEMS TO THE MAILBOX FOLDER

If you have previously been using a Personal Folders file to save your Outlook items, you may want to copy those items to a Mailbox folder on Exchange Server.

→ You must display the items to be copied in a Table-type view. **See** "Creating Views and Print Styles," **p. 943**.

To copy Outlook items from a Personal Folders file to a server Mailbox:

1. With any Table-type Outlook Information viewer displayed, choose View, Folder List.
2. If necessary, expand your Personal Folders file to display the names of the folders it contains. Also, if necessary, expand your Mailbox to display the folders it contains.
3. In the folder list, select the folder in your Personal Folders file from which you want to copy items.
4. Select one or more items. If you want to select all items in the folder, choose Edit, Select All.
5. Hold down Ctrl while you drag the selected item or items onto the folder in your Mailbox into which you want to copy items. If you want to move items from one folder to the other instead of copying them, hold down Shift while you drag.

SENDING AND RECEIVING E-MAIL

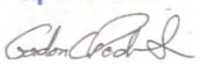
Sending and receiving e-mail messages using Exchange Server as the mail server is almost the same as sending and receiving Internet e-mail messages. One difference is that, because your computer is permanently connected to the server, you don't have to do anything to send messages from your Outbox to the server, nor do you have to do anything to collect messages waiting for you on the server. Outlook automatically sends messages you create to the server and saves copies of them in your Sent Items folder, and automatically collects messages waiting for you on the server and places them in your Inbox folder.

In addition to sending messages on you own behalf, you can send messages on behalf of another person.

When you create messages to be sent to other people who have accounts on an Exchange server, you should normally use the Microsoft Outlook Rich Text mail format because that's the native format used by Exchange. By using this format, you can be sure recipients will

see your messages exactly as you create them. However, for messages that go to people outside your Exchange environment who may not be using message clients that accept Rich Text Format, it's better to use Plain Text.

Tip #161 from



You might, under some circumstances, run into formatting problems if you send messages using the HTML format. Refer to the Microsoft Knowledge Base article Q183668, *HTML Formatting Not Retained on Exchange 5.5* for detailed information about this.

The remainder of this chapter describes messaging capabilities provided by Exchange Server that are in addition to the basic processes of sending and receiving messages.

CHANGING DELIVERY OPTIONS FOR MESSAGES

You can set several delivery options for messages you send by way of Exchange Server.

REDIRECTING REPLIES

Normally, when you send a message and recipients reply to it, the replies are automatically sent to you. You can, however, request that replies to specific messages are automatically sent to someone else.

To redirect replies:

1. At any time while you're creating a message in the Message form, choose Options in the form's toolbar to display the Message Options dialog box, shown in Figure 26.7.

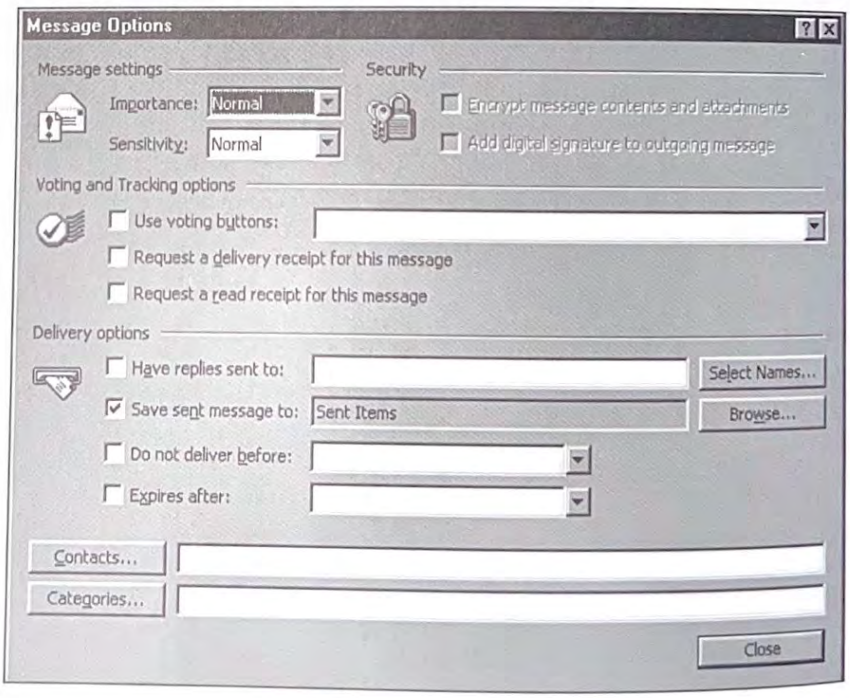


Figure 26.7
Use this dialog box to change the delivery options for a message.

2. In the Delivery Options section of the dialog box, check Have Replies Sent To. When you do so, your own name appears in the adjacent text box. The name is underlined to indicate the name is an alias for an e-mail address.
3. If you know the e-mail address of the person to whom you want replies to be sent, you can replace your own name with the e-mail address of the person to whom you want replies to be sent. Otherwise, choose Select Names to display the Have Replies Sent To dialog box shown in Figure 26.8.

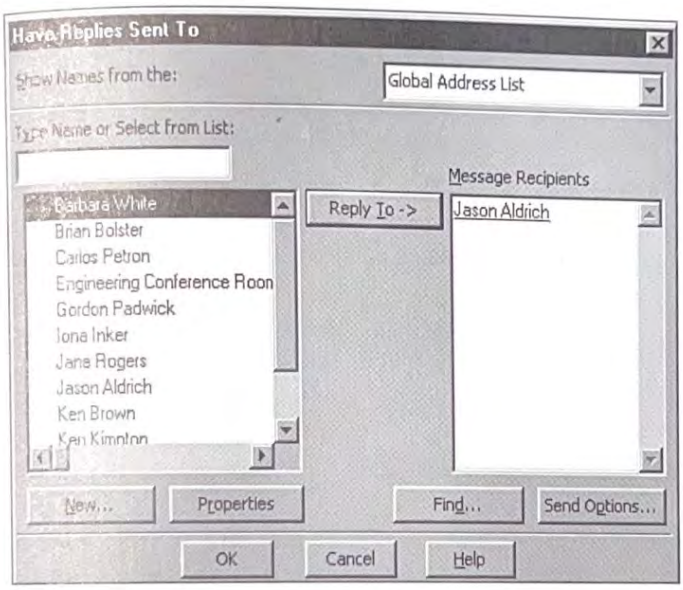


Figure 26.8
This dialog box initially shows your name in the Message Recipients box.

Note

This dialog box may be a little confusing. The box labeled Message Recipients is actually where the name of the person who should receive replies to your message appears, not a list of the people who receive your messages.

4. Delete your own name from the Message Recipients list.
5. In the list of names on the left, select the name of the person to whom you want replies to be directed. Then choose Reply To-> to copy that name into the Message Recipients list.
6. Choose OK to return to the Message Options dialog box that now shows the name of the person you selected in the Have Replies Sent To box.

The name you select in this manner applies only to the message you're currently creating.

Note

If the person who receives messages has created a rule that generates automatic replies to messages, that automatic reply is sent to you, not to the person you designate to receive replies.

→ Outlook helps you automate repetitive tasks. **See** "Creating and Using Rules," **p. 617**.

When recipients receive a message in which replies have been redirected, they won't see anything unusual about the message. The message header contains the name of the sender as usual. However, when a user replies to the message, the reply will be addressed to the person designated in the Have Replies Sent To box in the original message.

SCHEDULING A MESSAGE FOR LATER DELIVERY

In the Exchange messaging environment, you can create a message and mark it not to be delivered until a certain time and date. After you create the message and send it, Outlook sends it to Exchange in the normal way. Exchange holds the message until the date and time you specify and then sends it to the recipients.

To schedule a message for later delivery:

1. At any time while you're creating a message in the Message form, choose Options in the form's toolbar to display the Message Options dialog box, shown previously in Figure 26.7.
2. In the Delivery Options section of the dialog box, check Do Not Deliver Before. Outlook proposes tomorrow's date and 5:00 PM.
3. You can edit the proposed date and time. Alternatively, click the button at the right end of the box to display a calendar on which you can select a date.

Outlook saves copies of messages that are set for delayed delivery in your Sent Items folder in the same way that it saves ordinary messages. You can see these messages listed in the Sent Items Information viewer. You can double-click a message in the Information viewer to display it in a Message form. The InfoBar near the top of the Message form contains the delayed delivery information.

SETTING AN EXPIRATION DATE AND TIME

You can set an expiration date and time for a message. After you do so, Exchange automatically deletes the message if the recipient hasn't opened it by the date and time you specify. The procedure for setting an expiration time and date is the same as that described in the preceding section. Instead of checking the Do Not Deliver Before box, check the Expires After box.

You can see the headers of messages you've sent that have an expiration date in your Sent Items Information viewer. You can double-click a message header to display it in a Message form. The InfoBar near the top of the form contains the expiration information.

REQUESTING RECEIPTS

You can ask Outlook to send you two types of delivery receipts, either for all messages you send or for individual messages. You can request delivery receipts for a specific message by checking boxes in the Message Options dialog box, shown previously in Figure 26.7.

To request a receipt when a message arrives in a recipient's Inbox, check Request a Delivery Receipt for This Message. To request a receipt when a recipient opens a message, check Request a Read Receipt for This Message.

The following steps describe how you request delivery receipts for all messages you send. These steps apply to delivery receipts, to responses you get from meeting requests you send, and from messages you send that include voting buttons.

→ Outlook allows you to poll message recipients. **See** "Using Voting Buttons," **p. 687**.
→ While in the planning stage for your meeting, you'll need to arrange a time when everyone in your workgroup can meet. **See** "Planning a Meeting," **p. 405**.

To request delivery receipts for all messages:

1. With any Outlook Information viewer displayed, choose Tools, Options, and select the Preferences tab in the Options dialog box.
2. Choose E-mail Options and then, in the E-mail Options dialog box, choose Tracking Options to display the Tracking Options dialog box, shown in Figure 26.9.

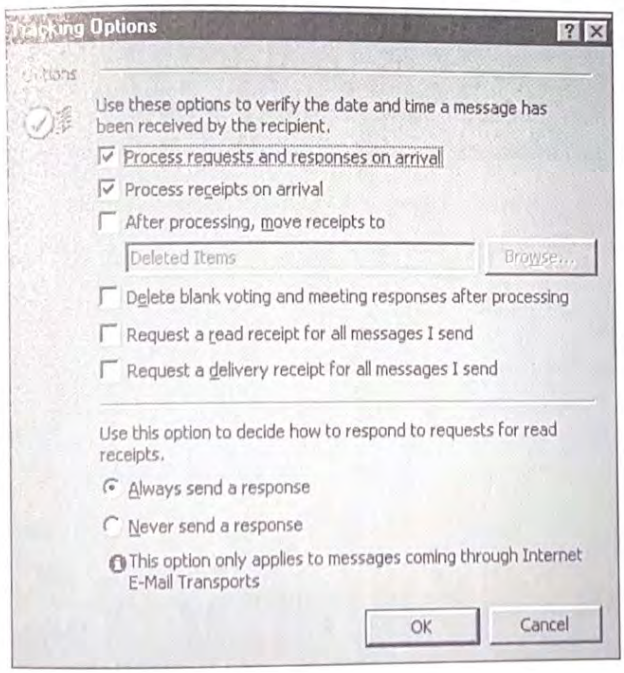


Figure 26.9
Use this dialog box to set tracking options that apply to all the messages you create.

PART V
CH 26

Tip #162 from

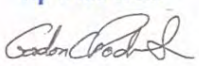
Within your Exchange Server environment, tracking options work as explained here. If you're using Outlook as an Exchange client and are communicating with people who have other messaging environments, some of the choices you make here may not operate as you expect.

3. If you want to keep delivery receipts and other responses in a folder other than your Inbox folder, check After Processing, Move Receipts To. When you do that, Outlook proposes to move receipts and responses to your Deleted Items folder. You can choose Browse to open the Select Folder dialog box, in which you can select any other Outlook folder (or create a new folder and select that).
4. If you want to delete voting and meeting responses that contain no text, check the Delete Blank Voting and Meeting Request Responses After Processing. By doing so, these responses are deleted from your Inbox (or other folder that you specified). Even though the response messages are deleted, those responses are still tallied.
5. To request a read receipt for all messages you send, check the Request a Read Receipt for All Messages I Send box.
6. To request a delivery receipt for all messages you send, check the Request a Delivery Receipt for All Messages I Send box.
7. Choose the Always Send a Response option button if you are willing to respond to requests for read receipts. Alternatively, check the Never Send a Response if you don't want to respond to requests for read receipts. This choice applies only to responses requested by way of an Internet mail server.

After you've set receipt options that apply to all messages, you can use the Message form's Message Options dialog box to make other choices for individual messages.

After you send messages for which you request one or both receipts, Exchange automatically sends receipt messages to your Inbox.

Tip #163 from



When you receive a read receipt, all you know is that a recipient opened the message, or marked it as read. You have no guarantee the recipient actually read it. If you really want to know that a recipient has read the message, you should request the recipient to send an acknowledgment to you.

TRACKING MESSAGE RECEIPTS

If you send a message in which you have requested a delivery receipt, a read receipt, or both to several people, you can easily see a tally that shows which people have read your message.

To see a tally of people who have read your message:

1. With any Outlook Information viewer displayed, select the My Shortcuts section of the Outlook Bar and select Sent Items to display the Sent Items Information viewer.
2. In the Sent Items Information viewer, double-click the message for which you want to see the tally. Outlook displays a message form that now has two tabs. The Message tab is selected—it contains your original message.
3. Select the Tracking tab shown in Figure 26.10.

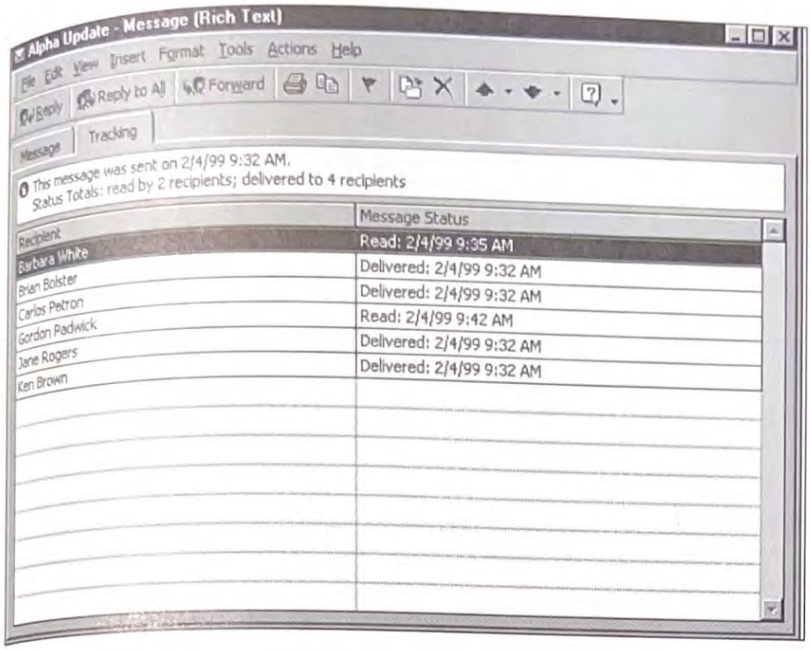


Figure 26.10
The Tracking tab contains a table that lists the message recipients to whom you sent the original message and shows which of those recipients have read it. Notice the status totals at the top of the table.

4. If you want to print a copy of the response tally, open the form's File menu and choose Print.

Tip #164 from



You can arrange the list of recipients in alphabetical order by clicking the title at the top of the Recipient column. To send a copy of some or all rows in the list to someone else, select the rows you want to send, press Ctrl+C to copy the list into the Clipboard, create a new message, and press Ctrl+V to paste the selected rows into that message.

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RECALLING MESSAGES

Subject to certain conditions, you can recall a message that you've previously sent. For a message recall to be successful:

- The recipient must have Outlook running
- The recipient must be logged on to Exchange
- The recipient must not have opened the message
- The message must be in the recipient's Inbox folder

As mentioned in various places in this book, it should be normal practice for all users to keep Outlook running (probably minimized) while their computers are turned on. If that happens, the first of these conditions is satisfied.

Normally, when a user logs on to Windows NT Server, that user is automatically logged on to Exchange Server. That satisfies the second condition.

The third condition is common sense. A recipient who has opened a message has probably read it, or at the least knows it's waiting to be read. You wouldn't want to open a message and subsequently find that somebody else has deleted it from your Inbox.

The last condition is the one that's likely to give you the most trouble. That's because many users employ Rules in Outlook or Exchange to place messages in specific folders other than their Inbox folders. Because of that, many of the messages you send are likely to be in folders other than Inbox folders on users' computers or in their Exchange stores.

Here's another point to be aware of. In order for Outlook on your computer to know whether a recipient has opened a message, you must have sent the message with a read receipt requested. If you sent the message you're trying to recall without requesting a read receipt, Outlook won't receive a read receipt even though the recipient has opened the message. As a result, Outlook will report "No recipients have reported reading the message" even though some may have done so. This will make you think that you can successfully recall the message when in fact you can't. For this reason, you should consider requesting a read receipt for all messages you send by way of Exchange.

Note The disadvantages of requesting receipts are that it increases network traffic and also increases each Outlook user's storage requirements.

Caution Because there's a strong possibility that you won't be able to recall messages, be careful what you send.

Knowing that message recall works only some of the time, here's how you attempt to recall a message.

To recall a message:

1. With any Outlook Information viewer displayed, select the My Shortcuts section of the Outlook Bar and choose Sent Items to display the Sent Items Information viewer.
2. Double-click the message you want to recall to display that message in the Message form.
3. Choose Actions, Recall This Message to display the dialog box shown in Figure 26.11.

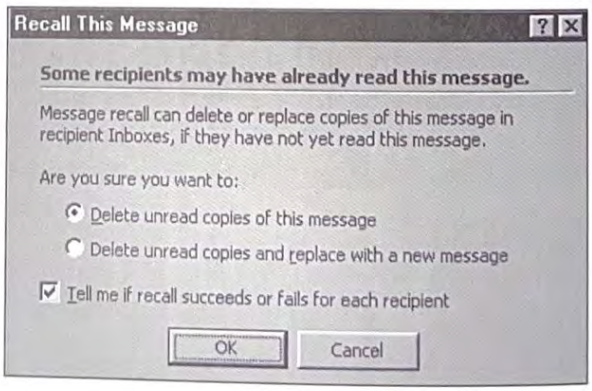


Figure 26.11
This dialog box warns you that you may not be able to recall the message from some recipients.

4. Choose the Delete Unread Copies of This Message option button and go to step 6. Alternatively, choose the Delete Unread Copies and Replace with a New message option button and go to step 5.
5. Edit the original message that Outlook automatically displays in a Message form. Then choose Send in the form's toolbar to send the revised message. If the recall is successful, the revised message replaces the original message in the recipients' Inboxes.
6. Normally, leave the Tell Me if a Recall Succeeds or Fails for Each Recipient box checked.

Within a short time, you should have messages in your Inbox telling you whether your recalls have succeeded or failed.

USING VOTING BUTTONS

You can send a message that asks a question to which you want people to reply with one of a set of possible answers. The message can include Outlook's built-in voting buttons, or voting buttons you define.

Outlook includes three sets of predefined voting buttons:

- Approve; Reject
- Yes; No
- Yes; No; Maybe

You can define your own voting buttons with as many choices as you like. However, each message can contain only one set of voting buttons.

CREATING A MESSAGE THAT CONTAINS VOTING BUTTONS

Start by creating a message in the normal way. At any time while you're creating the message, choose Options in the Message form's toolbar to display the Message Options dialog box, shown previously in Figure 26.5. Then proceed as follows.

To create a message containing voting buttons:

1. Check the Use Voting Buttons box. Outlook displays the first built-in choice of voting buttons: Approve; Reject, as shown in Figure 26.12.
2. If you want to use a different set of built-in voting buttons, click the button at the right end of the Use Voting Buttons box to display a list and select from that list. If you want to define your own voting buttons, enter the names of these buttons in the Use Voting Buttons box, separating one button name from the next with a semicolon, as shown in Figure 26.13.

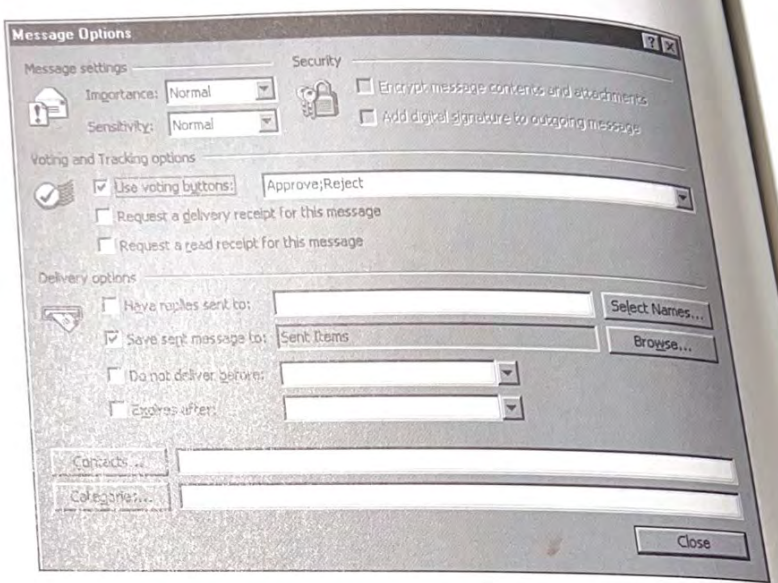


Figure 26.12
Outlook initially suggests Approve; Reject as the names of the voting buttons.

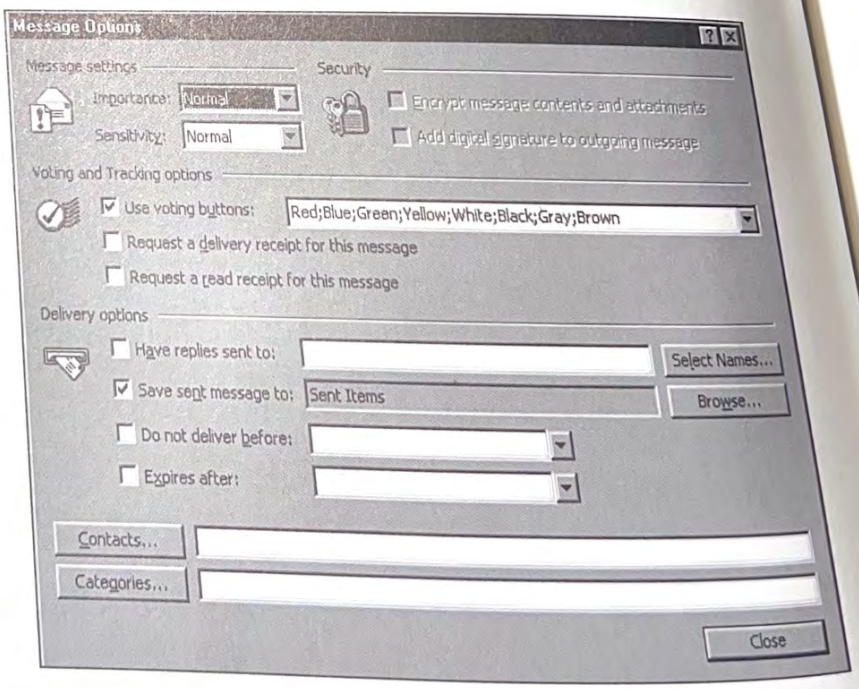


Figure 26.13
These voting buttons ask recipients to choose a color.

3. Choose Clos
4. Complete th

REPLYING TO A M

When you rec
in your Inbox
To see the v
Information



3. Choose Close to close the Message options dialog box and return to the Message form.
4. Complete the message and send it in the normal manner.

REPLYING TO A MESSAGE THAT CONTAINS VOTING BUTTONS

When you receive a message that contains voting buttons you don't see the voting buttons in your Inbox Information viewer, nor is there any indication of them in the Preview pane. To see the voting buttons, you must double-click the message header in the Inbox Information viewer to display the message in a Message form, as shown in Figure 26.14.

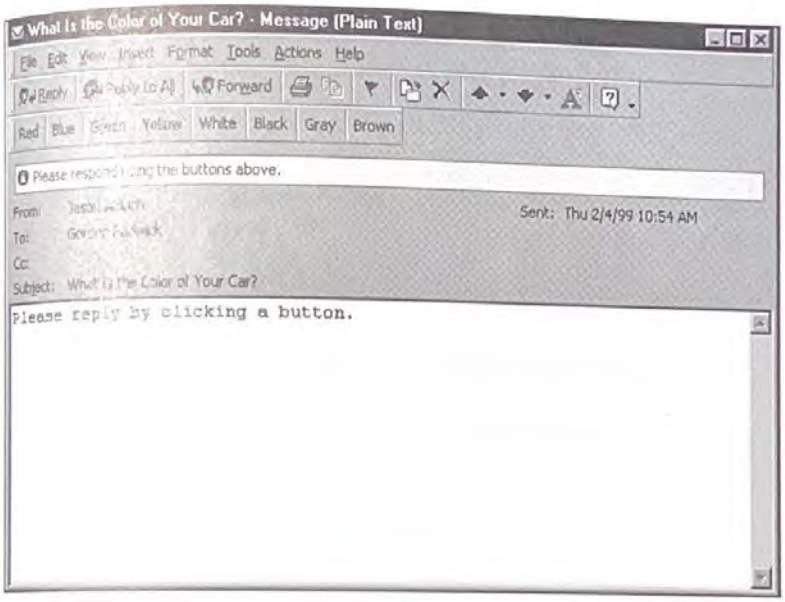


Figure 26.14
The Message form shows the voting buttons immediately below the toolbar.

Notice that the InfoBar draws your attention to the voting buttons with the words "Please respond using the buttons above." As usual, the InfoBar has a bright yellow background, so it's immediately obvious.

To reply to the message, click one of the buttons. Outlook displays the dialog box shown in Figure 26.15.

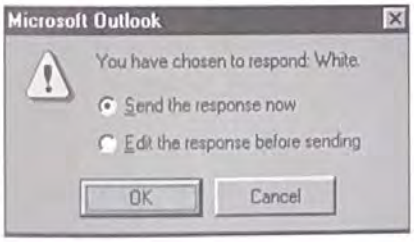


Figure 26.15
This dialog box confirms which voting button you chose.

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If you accept the default option button Send the Response Now and then choose OK, Outlook immediately sends your response back to the sender. The InfoBar in the Message form changes to show which voting button you chose as well as the date and time you sent the response.

If you choose Edit the Response Before Sending and then choose OK, Outlook displays a Message form that's addressed to the sender of the original message with the name of the voting button you selected in the Subject box. You can enter a message to the original sender, and then choose Send in the form's toolbar to send your and message back to the original sender.

RECEIVING VOTING RESPONSES

When you receive responses to a message containing voting buttons that you sent, those responses appear as usual in your Inbox Information viewer. The message header there contains the name of the respondent in the From column and the name of the voting button that respondent selected in the Subject column. You can double-click the message header to see the message in a Message form, as shown in Figure 26.16.

If the respondent sent a message with the response, that message is displayed in the notes box.

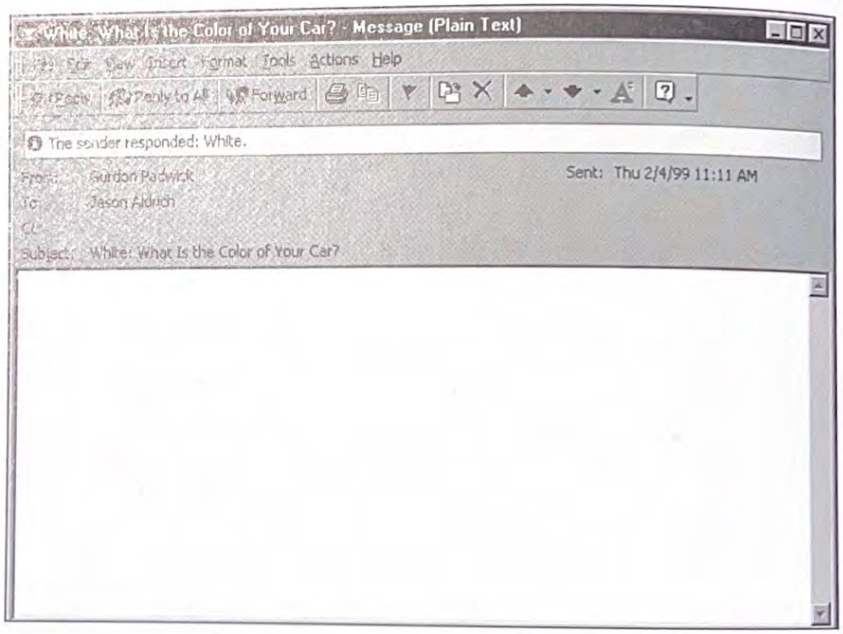


Figure 26.16
The InfoBar near the top of the Message form tells you which voting button the respondent selected.

DISPLAYING A TALLY OF VOTING RESPONSES

Follow these steps to display a tally of responses to the message you sent.

To see a tally of responses:

1. With any Outlook Information viewer displayed, select the My Shortcuts section of the Outlook Bar and choose Sent Items to display the Sent Items Information viewer.

2. Double-click the original message containing voting buttons that you sent to display that message in a Message form that now has two tabs. The Message tab showing the original message is initially selected.
3. Select the Tracking tab, shown in Figure 26.17.

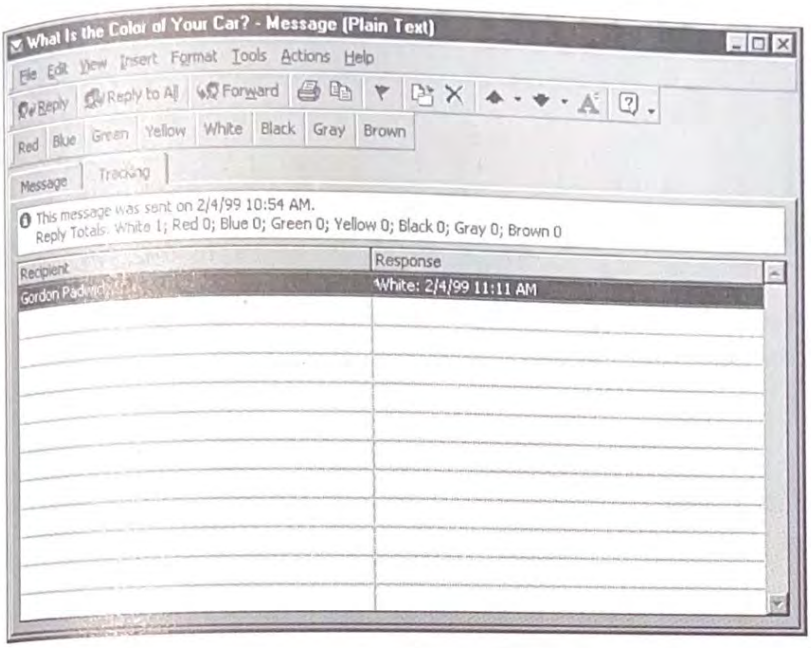


Figure 26.17
The InfoBar near the top of the Tracking tab contains a summary of the responses you've received. The table shows the voting button chosen by each respondent, only one in this case.

As described previously in this chapter, you can sort the table that contains details of responses, print it, and copy it into another message.

→ If you send a message in which you have requested a delivery receipt, you can easily see who has read the message. To learn more, **see** "Tracking Message Receipts," **p. 684**.

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DELEGATING ACCESS TO YOUR FOLDERS

When using Exchange as your messaging system, you can let other people act as delegates on your behalf.

If you have a trusted administrative assistant, you can give that assistant full delegate access to any or all of your Outlook folders. That's quite different from allowing your assistant to log on as you because you can control which of your Outlook folders your assistant can access.

If you're going to be out of the office for a while, you can give one of your colleagues delegate access to your mail folders so that person can respond to mail on your behalf while you're away.

DELEGATING ACCESS TO YOUR E-MAIL

Here's how you give another person delegate access to your e-mail. Although Outlook allows you to select more than one delegate, it's usually best to select only one.

Note

The procedure described here is based on the assumption that you save your Outlook items in the Exchange store. If you save your Outlook items in a Personal Folders file or an Offline Folders file, a delegate can only send mail on your behalf, not access your folders.

To give delegate access to your mail:

1. With any Outlook Information viewer displayed, choose Tools, Options to display the Options dialog box.
2. Select the Delegates tab shown in Figure 26.18 (this tab is available only if you have the Microsoft Exchange Server information service in your profile).

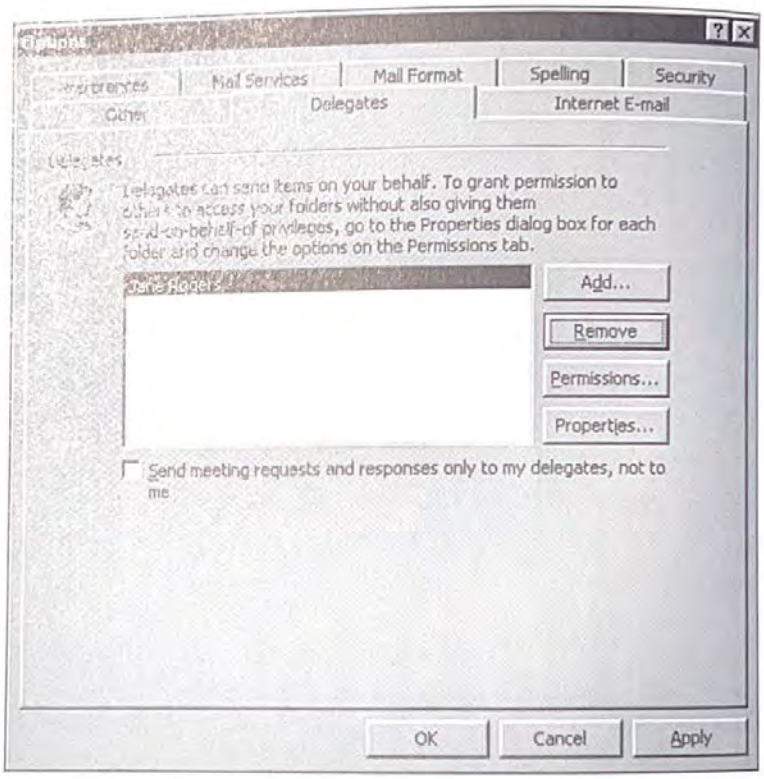


Figure 26.18
The tab is shown here with a delegate already added.

3. If you want to add a delegate, choose Add to display the Add Users dialog box shown in Figure 26.19.

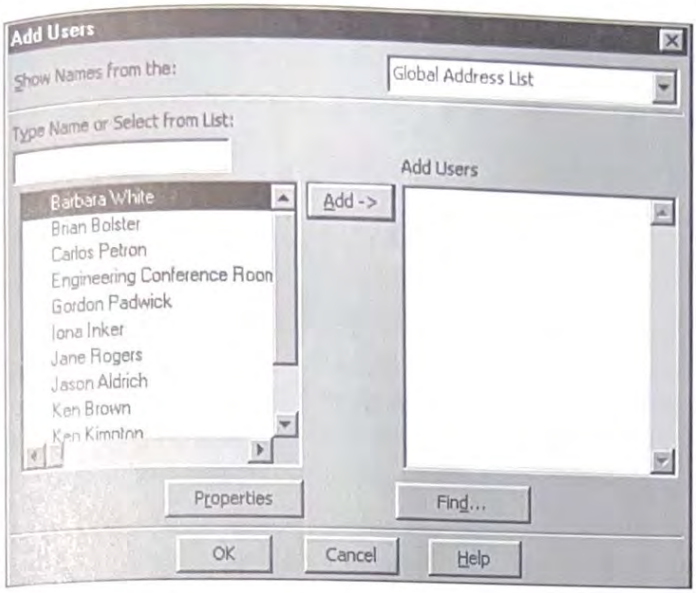


Figure 26.19
The left box shows the names of users in your primary address book.

4. If necessary, open the drop-down Show Names from The list to access other address books. Choose another address book if necessary to display the names in that address book. The address book you choose should be one that contains the names of people who have accounts on your Exchange server.
5. Select the name of the person you want to appoint as your delegate. Then choose Add-> to add that person's name to the Add Users list.
6. Choose OK to return to the Delegates tab, then choose OK to display the Delegate Permissions dialog box shown in Figure 26.20.

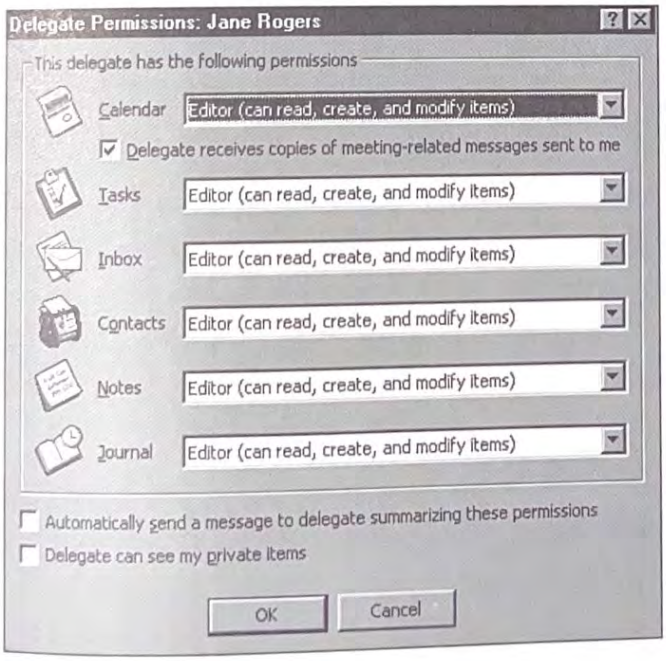


Figure 26.20
Use this dialog box to select the Outlook folders to which you want the delegate to have access.

7. For each of the types of Outlook items you can choose to allow the delegate to have these permissions:
   - None
   - Reviewer
   - Author
   - Editor

   Open the drop-down list box for each type of Outlook item and select the permission you want to give (each type of permission is defined in the drop-down list). If you only want the delegate to have access to your e-mail, all item types except Inbox should have the None permission. If you want the delegate to fully act on your behalf as far as e-mail messages are concerned, the e-mail permission should be Editor.
8. To have Outlook Send a message to the delegate to inform that person about the permissions you've given, check Automatically Send a Message to Delegate Summarizing These Permissions. After you do so, Outlook sends a message that appears in that delegate's Inbox Information viewer.
9. If you have assigned the delegate permission to access one or more of your folders that contains items you've marked as Private, check Delegate Can See My Private Items if the delegate is indeed a trusted assistant. Make sure this box is unchecked if you don't want the delegate to see your private items.
10. After you've assigned permissions, choose OK to return to the Delegates tab, then choose OK to close the Options dialog box.

Note

You can reopen the Delegates tab in the Options dialog box at any time to change a delegate's permissions. To do so, select the delegate, then choose Permissions. To remove a delegate, select that delegate's name in the Delegates tab of the Options dialog box, and choose Remove.

ACCESSING FOLDERS FOR WHICH YOU HAVE DELEGATE ACCESS

After you've been granted delegate access to someone else's folders, you can open that person's folders as well as your own.

When you click a shortcut icon in the Outlook Bar, Outlook opens your own Outlook folders in the normal manner.

To open someone's folders for which you have delegate permission:

1. With any Outlook Information viewer displayed, choose File, move the pointer onto Open, and choose Other User's Folder. Outlook displays the dialog box shown in Figure 26.21.



Figure 26.21
Use this dialog box to specify the folder you want to open.

2. In the Name box, enter the name of a person who has given you delegate access. Alternatively, choose Name to display the Select Name dialog box in which you can select a person's name.
3. Open the Folder drop-down list and select the folder you want to open. Choose OK. If the person you named has not given you delegate permission at all, or if the folder you select is not a folder for which you've been given delegate permission, Outlook displays a message stating "Unable to display folder." If the person you named has given you delegate permission for the selected folder, Outlook displays that folder in an Information viewer superimposed over your Information viewer, as shown in Figure 26.22.

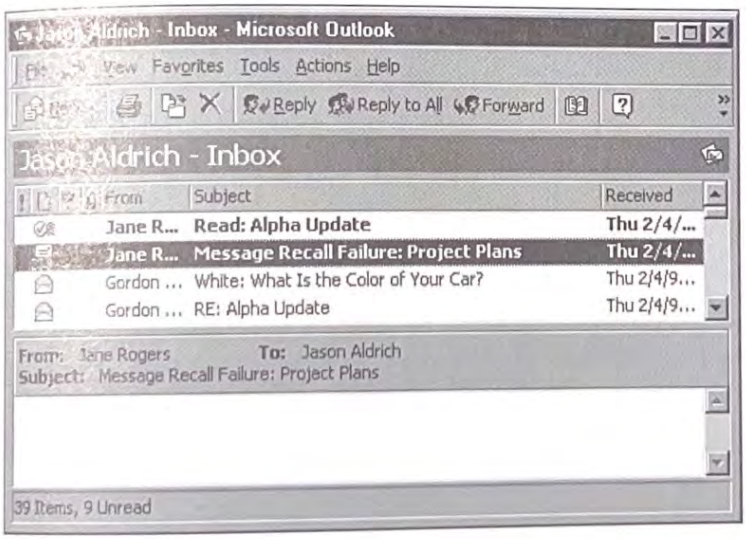


Figure 26.22
This is an example of an Inbox Information viewer displayed using delegate access. Notice that the name of the person who owns the folder is displayed in the banner.

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With the other person's folder displayed in an Information viewer, you can work with the information in that viewer in the same way that you work with information in your own folders. You are, of course, subject to the permissions the folder's owner granted to you. For example, if you only have permission to read information, you won't be able to create new items or edit existing ones.

After you've finished working with the other person's folder, you can close that Information viewer by clicking the X at the right end of the viewer's banner.

The next time you choose File and move the pointer onto Open, you'll see a list of folders you recently opened. You can choose any folder from the list to open that folder again.

SENDING MESSAGES ON SOMEONE ELSE'S BEHALF

You need delegate permission in order to send messages on another person's behalf.

To send a message on behalf of someone else:

1. Starting from Outlook running under your own profile, display the Inbox Information viewer.
2. Choose New in the Standard toolbar to display the Message form.
3. In the Message form's menu bar, choose View, From Field to add the From box near the top of the form, as shown in Figure 26.23.



Figure 26.23
The Message form now has a From box.

4. Enter the name of the person on behalf of whom you're sending into the From box. Alternatively, choose From to display the Choose Sender dialog box and select the person's name in that dialog box.
5. Complete the remaining parts of the form as you normally do. Then choose Send in the form's Standard toolbar to send the message.

As usual, Outlook saves a copy of the message you sent in your Sent Items folder. If you open that copy, you'll see something like the message shown in Figure 26.24.

Note

If you attempt to send a message on behalf of someone who hasn't given you delegate permissions, it might initially appear that you have been able to do so. However, soon after you send the message, Exchange will send you a message that will appear in your Inbox Information viewer: "The originator does not have permission to submit the message." The person to whom you sent the message will not receive it.

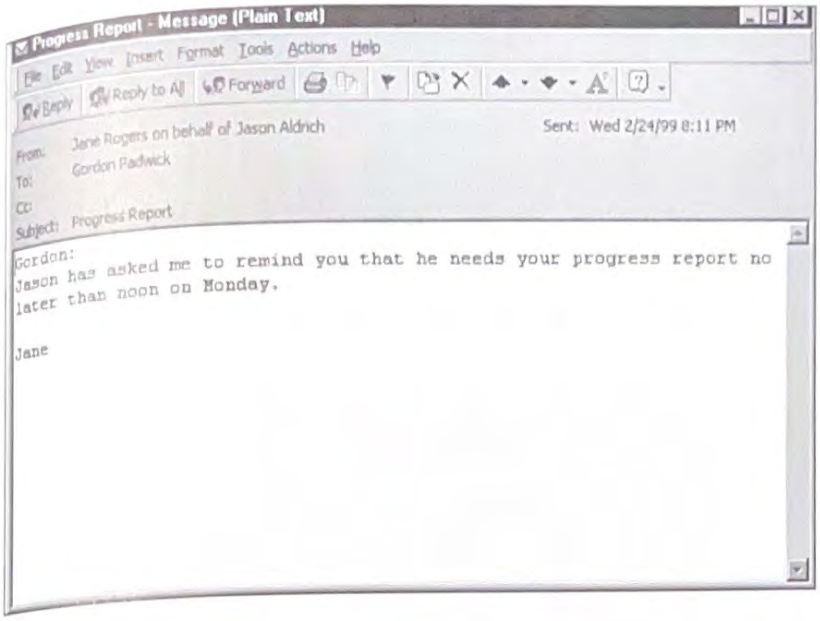


Figure 26.24
Notice that the From line shows the message from you on behalf of someone else.

RECEIVING A MESSAGE SENT ON BEHALF OF ANOTHER PERSON

When you receive a message that was sent on behalf of someone other than the actual sender, the message header appears in your Inbox Information viewer. The message appears to be from the person on behalf of whom it was sent, not from the actual sender. Similarly, the message displayed in the Preview pane gives no indication that it was actually sent by someone else. You only find out that the message was sent on behalf of the person it appears to be from when you double-click the message header to display the message in a Message form, just like the one previously shown in Figure 26.4.

USING SERVER-BASED RULES

Chapter 22, "Creating and Using Rules," introduced you to rules that can process incoming and outgoing messages automatically. That chapter focused on rules that run on your computer and are only active when your computer is turned on and Outlook is running.

If you use Outlook as a client for Exchange, you can also set up rules that run on the server—rules that operate whether or not your computer is turned on providing, of course, the server is up and running.

One of the examples in Chapter 22 was a rule that automatically sends a reply to messages you receive. As stated in that chapter, you have to leave your computer turned on with Outlook running for the rule to work. If you're using Outlook as a client for Exchange, a better solution exists—it's called the Out of Office Assistant.

USING THE OUT OF OFFICE ASSISTANT

Using Outlook as a client for Exchange, you can use the Out of Office Assistant running on Exchange to process your e-mail automatically, even when your computer is turned off. After you turn on the Out of Office Assistant, it automatically sends whatever reply you choose to senders. You can also set up the Out of Office Assistant to process rules you create. Of course, the Out of Office Assistant deals only with e-mail you receive by way of Exchange. It doesn't, for example, know anything about Internet e-mail that arrives directly to your computer.

To turn on the Out of Office Assistant:

1. With any Outlook Information viewer displayed, choose Tools, Out of Office Assistant to display the dialog box shown in Figure 26.25.

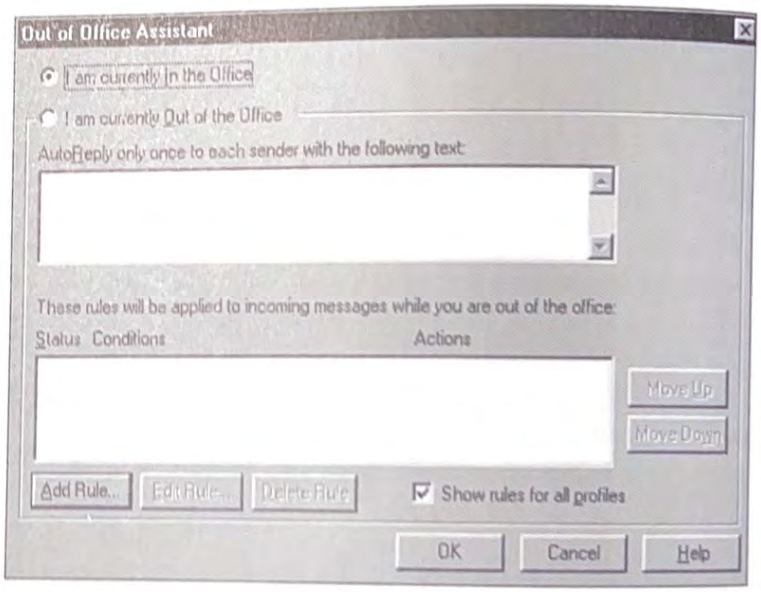


Figure 26.25
This dialog box opens with I Am Currently In the Office selected.

2. Choose I Am Currently Out of the Office.
3. In the box labeled AutoReply Only Once to Each Sender with the Following Text box, enter the message you want to be sent. Choose OK.

From now on, the message you entered in step 3 will be automatically sent whenever the first message from each sender arrives in your Exchange store.

When you return to the office and are ready to respond to messages, open the Out of Office Assistant dialog box again and choose I Am Currently In the Office.

You can use the Out of Office Assistant to do much more than just send an automatic reply. With the Out of Office Assistant dialog box open, choose Add Rule to display the dialog box shown in Figure 26.26. You can use this dialog box to create several rules.

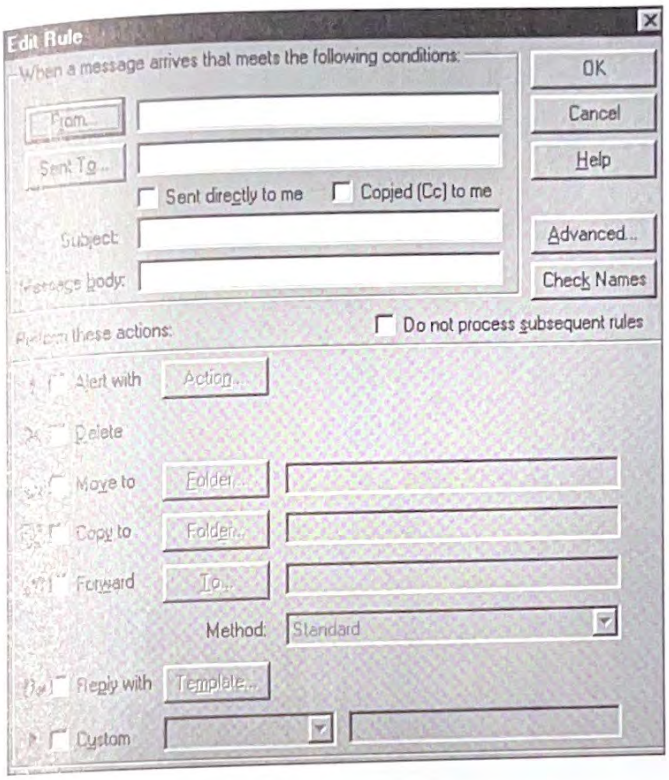


Figure 26.26
Use this dialog box to define a rule than runs on the server when a message arrives in your mailbox in the Exchange store.

The top section of the dialog box contains boxes in which you can define certain aspects of incoming messages. The rule is applied only if it satisfies all the criteria you define in these boxes.

The bottom section of the dialog box is where you can define what the rule does. The choices you make here should be obvious, particularly if you've read Chapter 22, so they're not covered in detail here.

You can make more precise definitions of the message to be acted on by choosing Advanced to display the dialog box shown in Figure 26.27.

RUNNING OUTLOOK RULES ON EXCHANGE

When you've finished designing a rule using the Rules Wizard, you choose Finish to save that rule. At that time, Outlook examines the rule to see if it can run on Exchange without access to your computer. If for some reason that's not possible—for example, if the rule involves saving a message in a folder on your computer's hard drive—Outlook displays a message stating "This rule is a client-only rule, and will process only if Outlook is running." When you see that message you have no alternative but to choose OK. Outlook saves the rule and the wizard window lists the rule with the words "client only" after the rule's name.

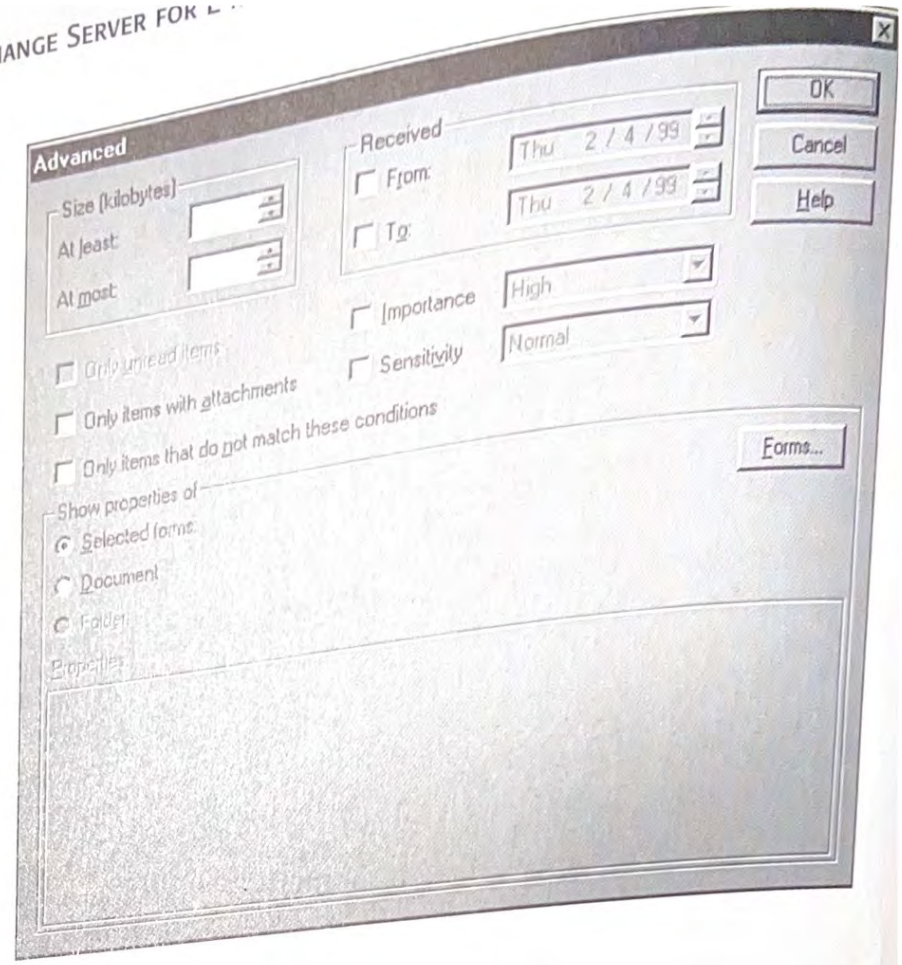


Figure 26.27
Use this dialog box to specify additional criteria about messages to be responded to.

If you create a rule that can be run on the server and doesn't need access to your computer, by default Outlook automatically saves that rule on the server instead of on your computer's hard disk. In that case, the rule's name is displayed in the wizard window without the words "client only" being added.

You know, therefore, that rule names displayed in the wizard window with the words "client only" appended refer to rules that operate only when Outlook is running on your computer; rule names without those words appended run on the server whether or not Outlook is running on your computer.

You can control whether or not Outlook saves rules on the server. To do so, choose Tools, Rules Wizard to open the Rules Wizard dialog box, and then choose Options to display the dialog box shown in Figure 26.28.

By default, Automatically is selected in the Update Exchange Server section of this dialog box. If you want to manually control whether Outlook saves rules on the server, select Manually.

Tip #165 from

Outlook saves the Automatically or Manually selection from one Outlook session to the next. If you select Manually and subsequently exit from Outlook, that setting will be in effect the next time you start Outlook.

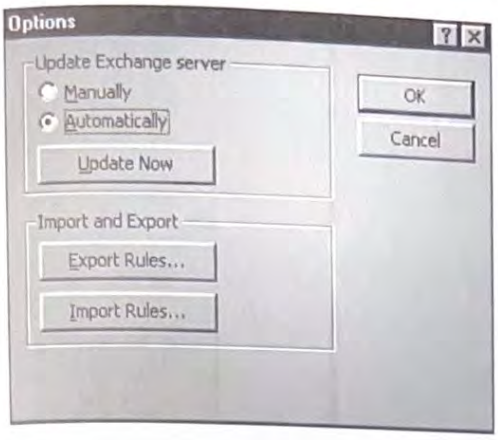


Figure 26.28
Use this dialog box to choose whether Outlook automatically saves new rules on the server.

After you select Manually, Outlook saves rules on your computer. To move those rules that can run on the server from your computer to the server, choose Update Now in the Rules Wizard Options dialog box.

USING WEB SERVICES

If your Exchange Server administrator has set up and enabled Outlook Web Access on Exchange, you can create and access forms in HTML format from within Outlook. In this situation, the new command Web Form appears on Outlook's Actions menu. When you choose this command, you can choose a form that your default Web browser automatically opens.

For detailed information about Outlook Web Access, refer to the Microsoft publication *Outlook Web Access Deployment and Troubleshooting Guide* which is available on the Web site `http://support.microsoft.com/support.exchange/content/whitepapers/whitepapers.asp`. You can also find information in books about Exchange Server, such as *Special Edition Using Microsoft Exchange Server 5.5*, published by Que.

TROUBLESHOOTING

Everyone has troubles, from time to time, with e-mail. It's not easy to find out the cause of those troubles; it's less easy to correct them. That's because e-mail is a very complex process that involves hardware and software on your computer, the physical connection between your computer and your e-mail servers, the paths between your servers and your recipients' servers, and the hardware and software your recipients use. You can only be responsible for your own hardware and software.

If you have trouble sending and receiving e-mail, you can try to isolate the problem by sending a message to yourself. By doing that, you're limiting the problem to what happens on your local computer and your account on the local Exchange server. If that works okay, you know that what you've set up is satisfactory. If that doesn't work, you need to ask for help from your local network or Exchange administrator.

Once you've been able to send a message to yourself, you know that your end of Outlook is fine. Now try sending messages to a colleague who has an account on the same Exchange server. Gradually expand your horizon until you find out where the difficulty arises. Once you've identified the problem, the only thing you can do is talk (yes, plain old telephone) to the person responsible for the system where the problem occurs to get help in resolving it.

UNDERSTANDING OUTLOOK'S FOLDERS





If you're using IMO Outlook or C/W Outlook, but not as a client for Exchange, Outlook saves items of information in a Personal Folders file. While your Personal Folders file is usually on your local hard drive, it can be on any other network disk to which you have access. If you're using C/W Outlook as a client for Exchange, Outlook can save items of information in a Personal Folders file on a local or network disk, and can also save items in the Exchange store.

Whether you've set up Outlook to save items on a local hard drive, a network drive, or the Exchange store, items are saved in a set of ten folders, one folder for each type of Outlook item. These folders are

- Calendar—For Outlook items that describe dated activities
- Contacts—For Outlook items that contain information about people or organizations
- Deleted Items—For Outlook items that you've deleted from other Outlook folders
- Drafts—For messages you're working on but aren't ready to send
- Inbox—For messages you've received
- Journal—For Outlook items that record information about messages you've sent to, and received from, specific people, Office files you've worked with, and various other activities
- Notes—For Outlook items you create to save temporary information
- Outbox—A temporary place where Outlook saves messages you've created until a connection to a mail server is available
- Sent Items—For copies of messages you've sent
- Tasks—For tasks you've created for yourself, asked other people to accept, or accepted from other people

You can create additional folders, and you can create subfolders below the original ten folders and below any other folders you create. This chapter explains how to create additional folders.

Note

A *folder* is space on a disk that is a container for information. Within the context of Windows, a folder contains files or other folders, all of which can be seen by Windows Explorer. Within the Outlook context, a folder is space within a Personal Folders file or Exchange store that contains Outlook items and other Outlook folders, and also can be used to store Windows files.

Each Outlook folder can contain one type of Outlook *item* *(page 19)*, other Outlook folders and files. If you attempt to save an Outlook item of one type in an Outlook folder that's intended for Outlook items of a different type, Outlook automatically converts the item

being saved into an Outlook item of the type the folder holds. For example, if you drag a Message item into a folder that holds Calendar items, Outlook saves the Message item as a Calendar item.

Note

The process of creating one type of Outlook item from a different type of Outlook item is known as *AutoCreate*.

Although an Outlook folder can contain Outlook items of only one type, it can contain Outlook subfolders that contain Outlook items of a different type.

EXAMINING THE OUTLOOK FOLDER LIST

With any Outlook Information viewer displayed, choose View, Folder List to see a list of Outlook folders. If you've just installed Outlook, you'll see a list of folders similar to that shown in Figure 37.1.

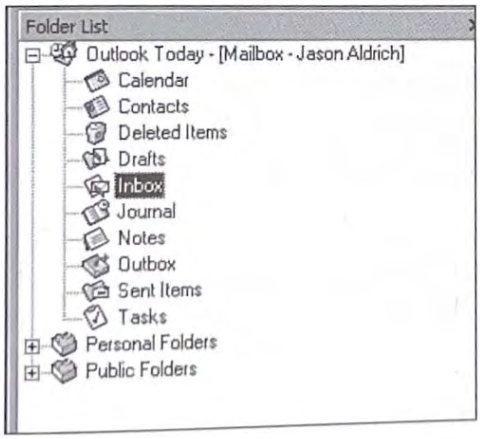


Figure 37.1
This is a list of folders such as you might see if you're using C/W Outlook as a client for an Exchange server.

Note

The Folder List shown in Figure 37.1 is typical of what you'll have after installing C/W Outlook as a client for an Exchange server. After installing C/W Outlook not as a client for an Exchange server, or having installed IMO Outlook, you'll have only one root folder.

After you, or other people, have been working with Outlook for a while, you may see many more folders than shown in Figure 37.1.

The folders are arranged in a tree structure with the root name at the top. This root name represents a Personal Folders file or an Exchange store. The folders in which Outlook saves items are listed under the root name.

WHY DO YOU NEED CUSTOM FORMS?

Outlook's standard forms comprise a complete *Personal Information Manager (PIM) (page 14)* that includes all the functionality needed for many users. But Outlook is also a development environment that gives you the tools you need to create your own custom forms, based on the standard forms. This flexibility means that you are not tied down to the form design or data fields that Microsoft built into the Outlook standard forms. You can customize a copy of a standard form by adding a few custom fields (as described in Chapter 41, "Creating and Using Custom Fields"), or you can create an entirely new form.

→ To learn more about working with custom fields, **see** Chapter 41, "Creating and Using Custom Fields."

You can even create a complete application consisting of several interlinked Outlook forms, and maybe a few Office UserForms (new to Outlook 2000). If you need to interact with other applications (such as Access or Word), you can use *OLE Automation (page 1124)* to link Outlook forms to data stored in other Office applications (or vice versa), as described in Chapter 42, "Enhancing Outlook Forms with Visual Basic Script Code," Chapter 43, "Creating Application-wide Outlook Visual Basic for Applications Code," and Chapter 44, "Understanding Automation."

→ To learn more about writing code for Outlook forms, **see** Chapter 42, "Enhancing Outlook Forms with Visual Basic Script Code."

→ To learn more about writing application-wide VBA code, **see** Chapter 43, "Creating Application-wide Outlook Visual Basic for Applications Code."

→ To learn more about writing Automation code for exchanging data among Office applications, **see** Chapter 44, "Understanding Automation."

REVIEWING OUTLOOK'S BUILT-IN FORMS

Unlike Word and Excel, which let developers create a new document or worksheet from scratch, the Outlook form designer restricts developers to creating customized forms based on one of the standard Outlook forms. In the Outlook interface, the available forms are displayed in the New Object drop-down list, shown in Figure 40.1.

Tip #251 from Helen Bell Feddema

The order of forms in the drop-down list changes with the current Outlook folder. The default form for that folder is at the top of the list, and you can click on the icon heading the list (just to the left of the word "New") to create a new instance of the default form without dropping down the list.

The standard forms available for selection in the interface are listed in Table 40.1, which lists the forms available for developers to customize, and their IPM message class (used to reference forms in VBS or VBA code). There are some discrepancies between these lists. While Appointments, Contacts, Tasks, and Task Requests have the same name throughout, the form called Mail Message in the interface is called just Message in the Forms Library, while its IPM class is Note. The form called Note in the interface and the Forms Library has an IPM class of StickyNote, and the Post form in the Forms Library is not a selection on the drop-down New Object list in some folders. The new NetFolder Conflict and

After deciding which set of fields has the best fit with your needs, you can start your customized form by creating a new form of the desired type by selecting it from the New Object drop-down list, as shown in Figure 40.18.

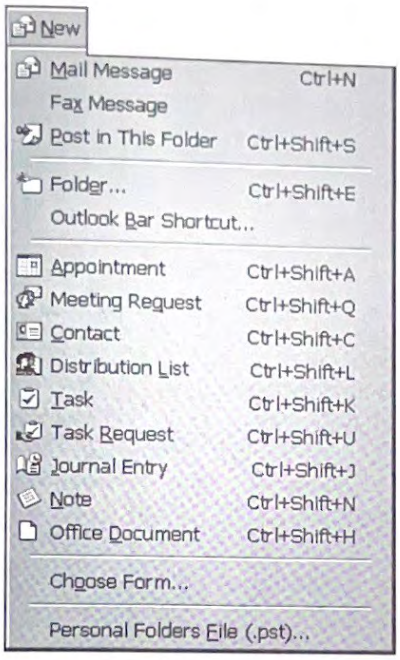


Figure 40.18
Selecting a form type for creating a new form.

Since the Contact form is the heart of an Outlook application—especially with the new Contact Linking features in Outlook 2000—the next section describes the creation of a custom Contact form in detail.

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CUSTOMIZING THE CONTACT FORM

As an example, I will step you through the creation of a custom Contact form that will be used to store a Christmas card and gift list, using some of the fields created in Chapter 41. Start by creating a new Contact form, then switch to design view. The General page on the Contact form is editable, so start by deleting the e-mail and Web site controls and graphics, which aren't needed for this type of list. To delete a control, just click it and press the Delete button.

ADDING CONTROLS TO A FORM

Tip #255 from Helen Feddema

If you don't need any of the built-in controls on a form page that is normally displayed, you can hide that page by pulling down the Form menu and clicking the Display This Page command (the check mark will disappear). To make one of the extra pages (P.2 to P.6) visible, pull down the Form menu and click the Display This Page command to check it, so the page will be visible.

Next, add some family-related fields to the new blank area. There is a Spouse Name control on the Details page, but that page has lots of unnecessary information and can't be edited, so the first step is to make that page invisible. To make a page invisible, click on its tab, then drop down the Form menu and uncheck the Display This Page item, as shown in Figure 40.19.

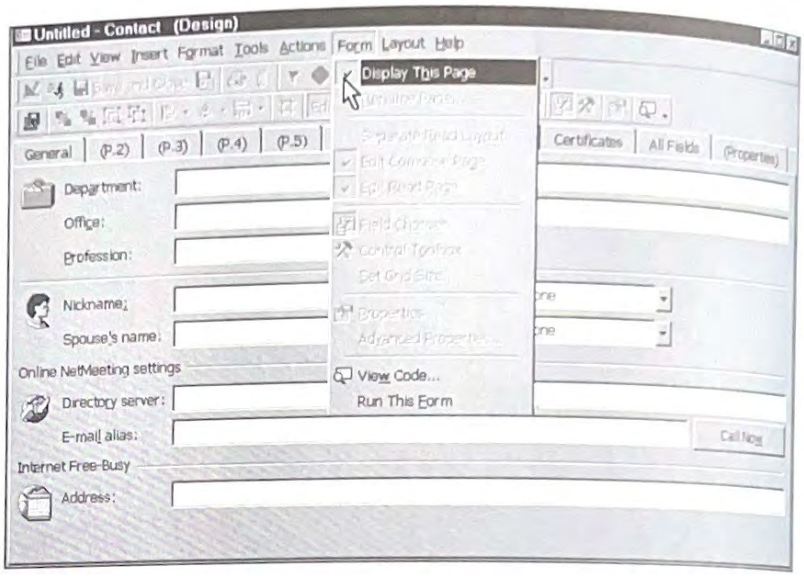


Figure 40.19
Making a form page invisible.

Next, switch back to the General page and insert the built-in Spouse and Children fields, and a Family label. The fields are in the Name Fields group, so they can be dragged to the page from the Field Chooser, after selecting that group, as shown in Figure 40.20. (Note that the pointer changes to a little gray box with a plus sign attached to it while the field is being dragged.)

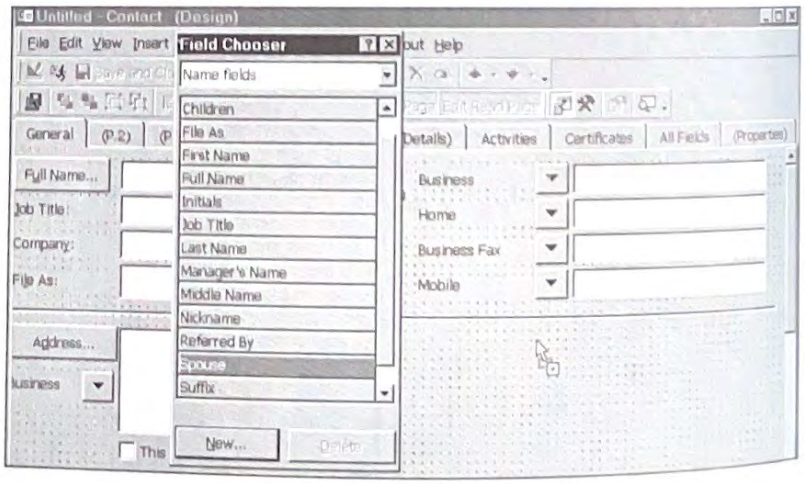


Figure 40.20
Dragging the Spouse field to a Contact form.

When you drag a text field to a form from the Field Chooser, it appears as a TextBox control with an attached Label control. After dragging the Children field to the form in a similar manner, the next step is to move the new fields down a bit, then insert a Label control for the group title. Since Label controls aren't bound to fields, they can't be dragged from the Field Chooser. To insert a Label control, first click the Toolbox button on the toolbar to open the Control Toolbox, as shown in Figure 40.21.

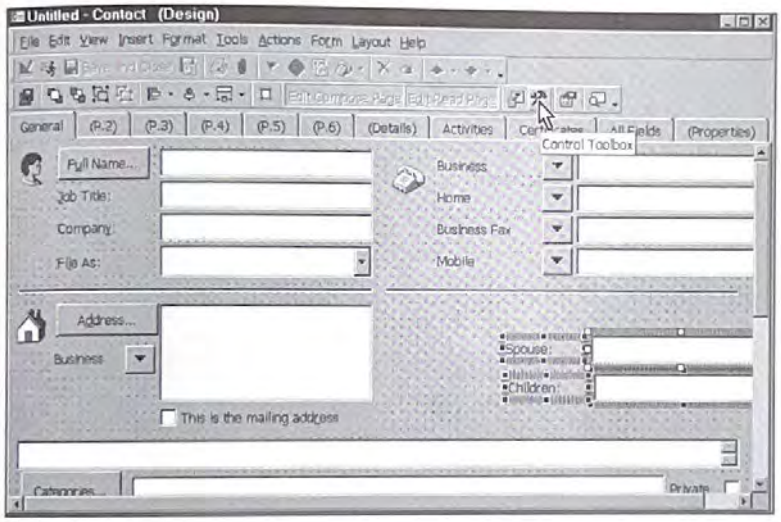


Figure 40.21
Opening the Control Toolbox.

After clicking the Label tool in the Toolbox (it's the one with the large "A"), you can either click the form to insert a default-sized Label control, or click and drag a rectangle on the form to create a Label control of the desired size. Use one of these methods to place a Label control on the form. You can change its caption directly in the control by double-clicking the original Label*n* text and replacing it with the text you want. However, you will probably want to make more changes than just the text, so right-click the new Label control and open its Advanced Properties sheet to select a different font size and color.

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Tip #256 from Hunter Hillegas

You can modify the color properties from either the Properties sheet or the Advanced Properties sheet, but the Advanced Properties sheet lets you see the foreground and background colors, while the Properties sheet just gives you a cryptic list of various Windows attributes to select from (such as Info Text and Inactive Caption).

Note

Outlook controls have two properties sheets: The Properties sheet and the Advanced Properties sheet. While many control properties appear in both sheets, some do not—for example, you can only bind a control to a field in the Properties sheet, while the WordWrap property is only found in the Advanced Properties sheet. To make things more confusing, some properties listed in the Advanced Properties sheet (such as ControlSource) are non-functional in Outlook.

The BackColor and ForeColor properties are set from either a drop-down list with the same cryptic Windows components that are in the Properties sheet (see Figure 40.26), or a considerably more intuitive Color dialog box shown in Figure 40.27.

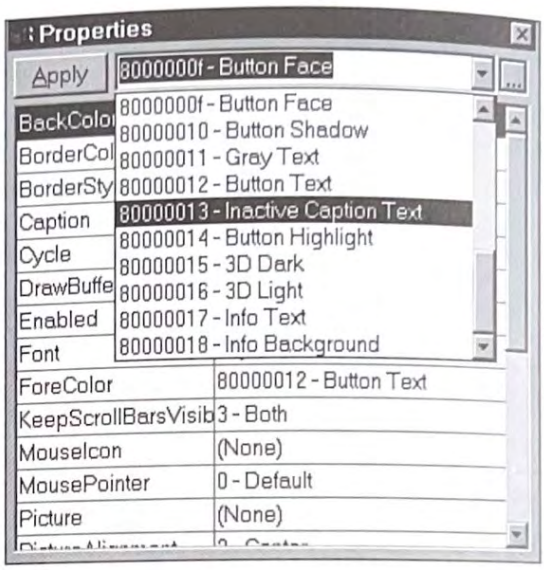


Figure 40.26
Selecting a BackColor value from the drop-down list.

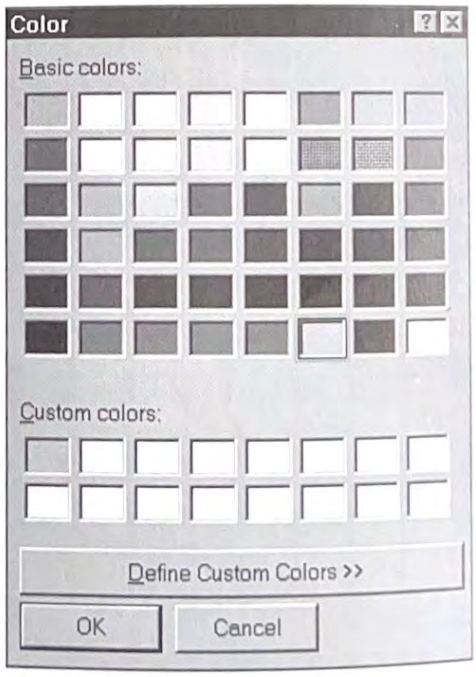


Figure 40.27
Selecting a color from the Color dialog box.

ADDING GRAPHICS TO A FORM

Finally, you can add an Image control with a Christmas theme for the family information group. Click the Image tool in the Toolbox (it's the last button on the right) to place an Image control on the form. Open the control's Advanced Properties sheet and select an image for its Picture property by clicking the Build button at the top of the sheet to open the Load Picture dialog box. Select an appropriate image, such as the reindeer image from the FrontPage collection, as shown in Figure 40.28.

Tip #258 from Helen Bell Feddema

Office 2000 comes with an extensive collection of clip art, which you can use for images on Outlook forms. The default location for these files is C:\Program Files\Common Files\Microsoft Shared\Clipart. Additionally, if you have the Premium Edition of Office 2000 (the one that includes FrontPage), you will have many more images to select, including the Reindeer image I picked for the Christmas List form.

Tip #259 from Helen Bell Feddema

You may find it more convenient to do any necessary editing or resizing of images in another program, such as Paintbrush, as Outlook offers only limited tools for manipulating images in Image controls. After resizing or editing an image, you can save it as a separate file, then just select the edited file for your Image control.

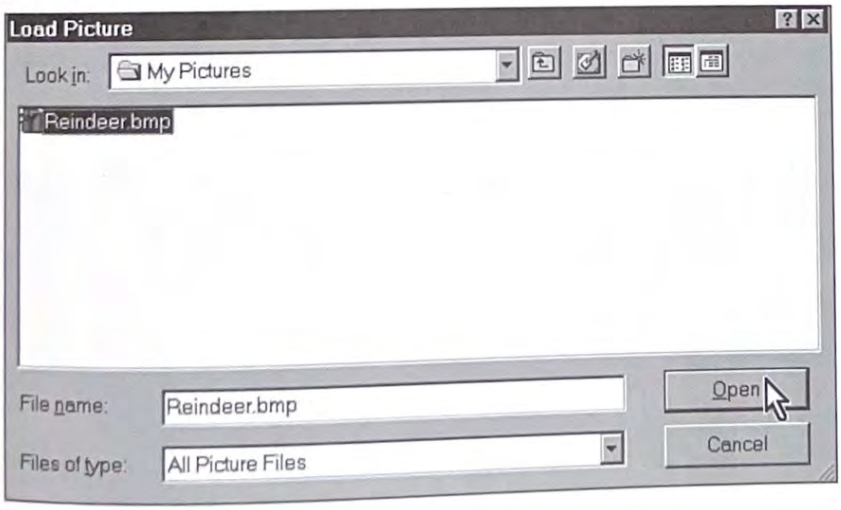


Figure 40.28
Selecting an image for an Image control.

The controls are shown in Figure 40.29. The group isn't quite done yet—the next section will show you how to align them more attractively.

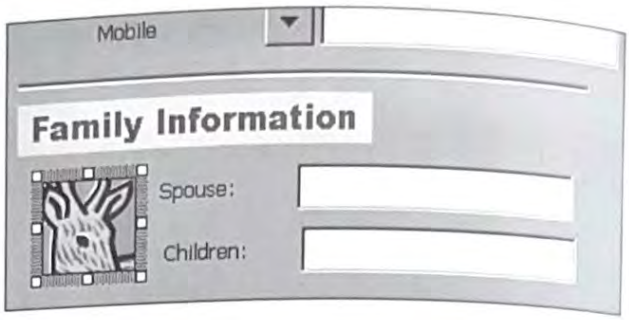


Figure 40.29
The Family Information controls.

UNDERSTANDING THE CONTROL PROPERTIES SHEET

When you work with controls on a form, you will need to set many of the control properties through the Properties sheet, accessible via a control's shortcut menu. Different types of controls have somewhat different selections on their Properties sheets. Most control Properties sheets have three pages—Display, Value, and Validation. However, depending on the control type, some of the properties on one or more pages of the Properties sheet may be disabled.

For example, all the properties on a Label control's Value and Validation pages are disabled, since a Label control is not bound to a field. Most of the properties on a CommandButton control's Value and Validation pages are disabled, since CommandButtons are not bound either, except for a few special cases. The Properties sheet for a Frame or Line control is more limited: it has just a single page, Display, with all properties enabled. However, you can adjust more of a Frame or Line control's properties by opening its Advanced Properties sheet, as described in the following tip.

Tip #260 from Helen Bell Feddema

There is no Line control in the Control Toolbox, but you can see controls named Linen on the General page of the default Contact form. A Line control is just a very short Frame control, so to insert a Line control on a form, start by inserting a Frame control from the Control Toolbox.

Next, open the Advanced Properties sheet for the new Frame control and set its Height property to just a few points–2 to 4 points makes a chiseled line, while 1 point makes a thin solid line. You can adjust the appearance of the line further by changing the Special Effect and BorderStyle properties in the Advanced Properties sheet.

The following discussion deals with the Properties sheet for a TextBox, ComboBox, or ListBox control, which have the fullest selection of adjustable properties.

To open a control's Properties sheet, right-click the control and select Properties from its shortcut menu, as shown in Figure 40.13 earlier in this chapter. Initially, the Properties sheet opens to the Display page, shown in Figure 40.30.

SHARING CUSTOM FORMS

If your computer is attached to a network running Exchange Server, you can share a custom form by saving it to the Organizational Forms Library instead of the Personal Forms Library. The Organizational Forms Library is available to all users on the network, so they can all use your form to make new items.

TROUBLESHOOTING

Q: Where's my form?

A: If you can't find a form after publishing it, you may have inadvertently saved it to another folder or library than you intended. If you are using Outlook in the Corporate/Workgroup mode, open the Forms Manager dialog box to locate your form (see Figures 40.76 through 40.82).

Q: When I create a new item using a custom form I designed, it already has data on it. Why isn't it blank?

A: You probably saved the form with some test data on it. Open the form in design view, and clear out all the data (look at all the fields on the All Fields tab to make sure you have cleared all the fields), then publish it again. Now new items created from the form should be blank.

Q: Why do I get the standard form instead of my custom form when I create a new item in a folder?

A: By default, Outlook uses the standard form for a folder, such as the Contact form for the Contacts folder. If you want to use a custom Contact form for the Contact folder, assign your custom form as the form to use for that folder, as described in the "Changing the Default Form Used by Contact Items" section in this chapter.

Q: Why do items imported from Access not use my custom form?

A: When you import items from another program, Outlook always uses the standard form for that folder, even if you have assigned the folder a custom form. To use a custom form when importing, you have to write VBA or VBS code to do the import, creating new items based on your custom form. You can download a form with a VBS procedure to upgrade the message class of items in a folder from the author's Web site, `http://www.ulster.net/~hfeddema/CodeSamples.htm`.

Q: I want to delete a form from my Personal Forms Library, but I installed the Internet Mail Only version of Outlook. How can I delete the form?

A: You can temporarily switch to Corporate/Workgroup mode, open the Forms Manager to delete the form (and do any other form housekeeping you need to do), then switch back to IMO mode. To switch Outlook modes, follow these steps: