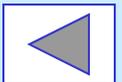
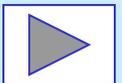


Microsoft Outlook Skills

Using Categories for Sorting, Filtering and Creating Group E-mail



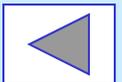
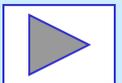
Oklahoma Department of Corrections
Training Administration Unit



Exit

Course Information

- Course author: Lynne Presley
- Course created: March 2002
- ORACLE course code: COMP238000
- Training Credit: 2 hours

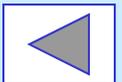
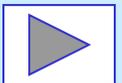


Exit

Course Objectives

At the end of this course, participants will be able to:

- Create, edit and delete an Outlook Contact
- Create a custom category for Contacts
- Assign a category to a Contact
- Sort Contacts by category
- Send an e-mail message to a group of Contacts in a specific category



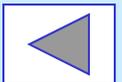
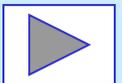
Exit

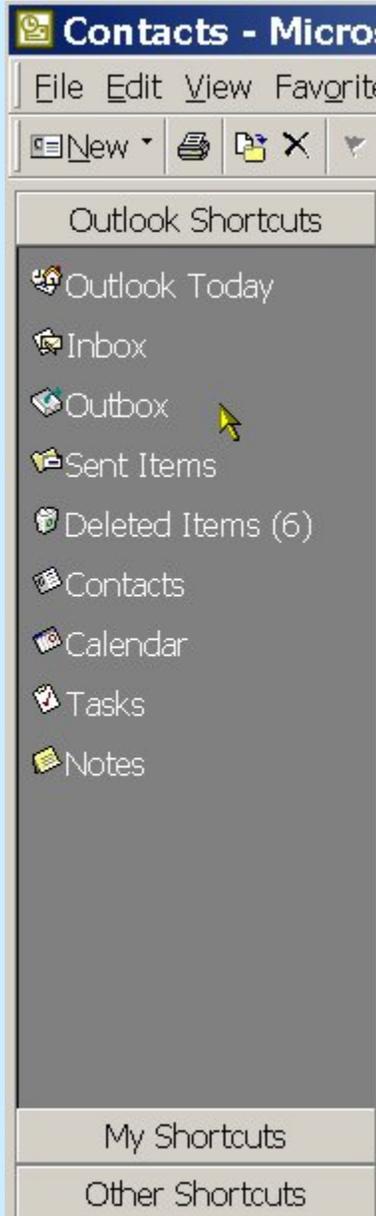
Introduction

Microsoft Outlook is a personal information manager and e-mail program. Outlook offers many features, including the ability to group Contacts into special categories. Categories may be created to sort your Contacts in many creative and useful ways.

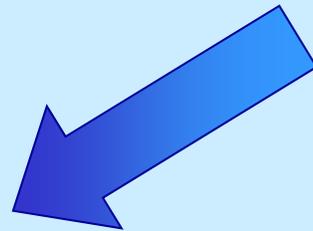
Recommended Method of Study:

This course is designed to be completed in two hours. I recommend that you go through the material once, then return to the beginning. Tile or otherwise arrange your browser window to cover no more than half your screen, then open Outlook and actually create Contacts and assign them categories as detailed in the course. This will reinforce course concepts and allow you to practice the skills you've learned. Ready? Let's start the course!

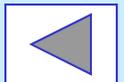
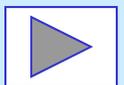




The Outlook Bar

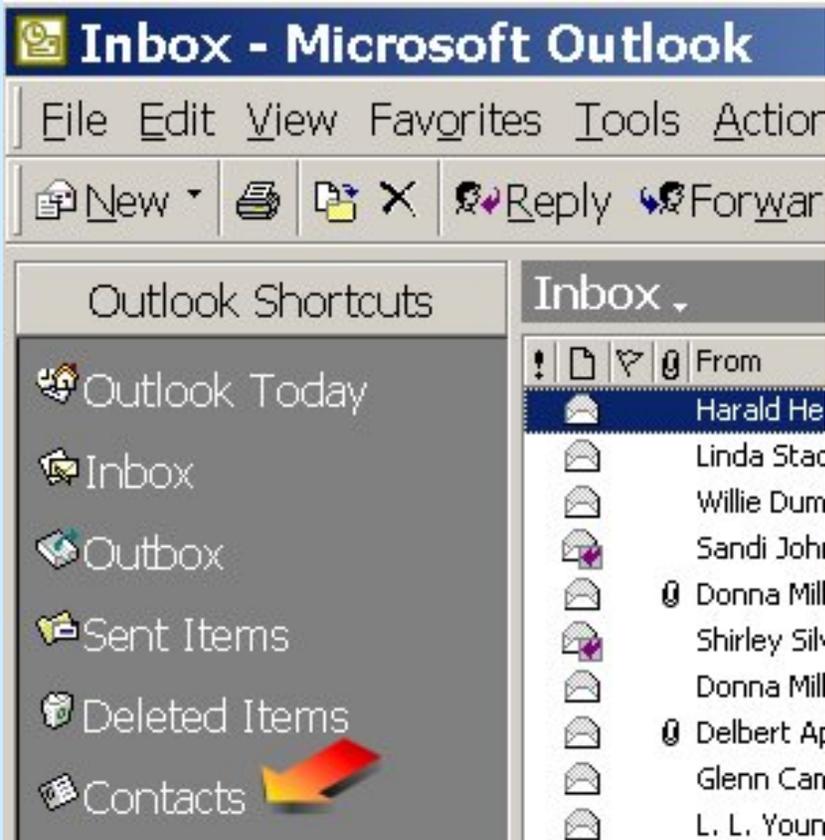


This course makes numerous references to the Outlook Bar, which is pictured to the left of this paragraph. You can move from section to section of Outlook by clicking on the icons on the Shortcut Bar.

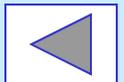
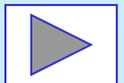


Create a Contact

Remember – read through the instructions once, then open Outlook on your computer and go through the course again, actually performing the steps.



1. Open Outlook and go to the Inbox. (Note: Examine the title bar at the top of the picture – note that it tells you that you’re currently in the Inbox.)
2. Click on “Contacts” on the Outlook Bar (see picture at left).

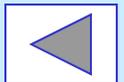
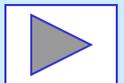


Create a Contact, continued



3. Click on the “New” icon to create a new Contact.

(Note: Examine the title bar at the top of the picture – note that it tells you that you’re currently in Contacts.)



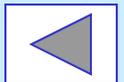
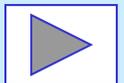
Create a Contact, continued

4. Type data in desired fields. If you plan to use the data to create form letters, labels, or envelopes, be sure to enter complete address information. When you're finished, click "Save and Close."

The screenshot shows a contact management window titled "Mary Jones - Contact". The window has a menu bar with "File", "Edit", "View", "Insert", "Format", "Tools", "Actions", and "Help". Below the menu bar is a toolbar with icons for "Save and Close", "Print", "Copy", "Paste", "Delete", "Undo", and "Redo". The main area is divided into tabs: "General", "Details", "Certificates", and "All Fields". The "General" tab is active, showing the following fields:

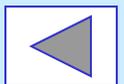
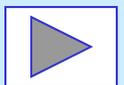
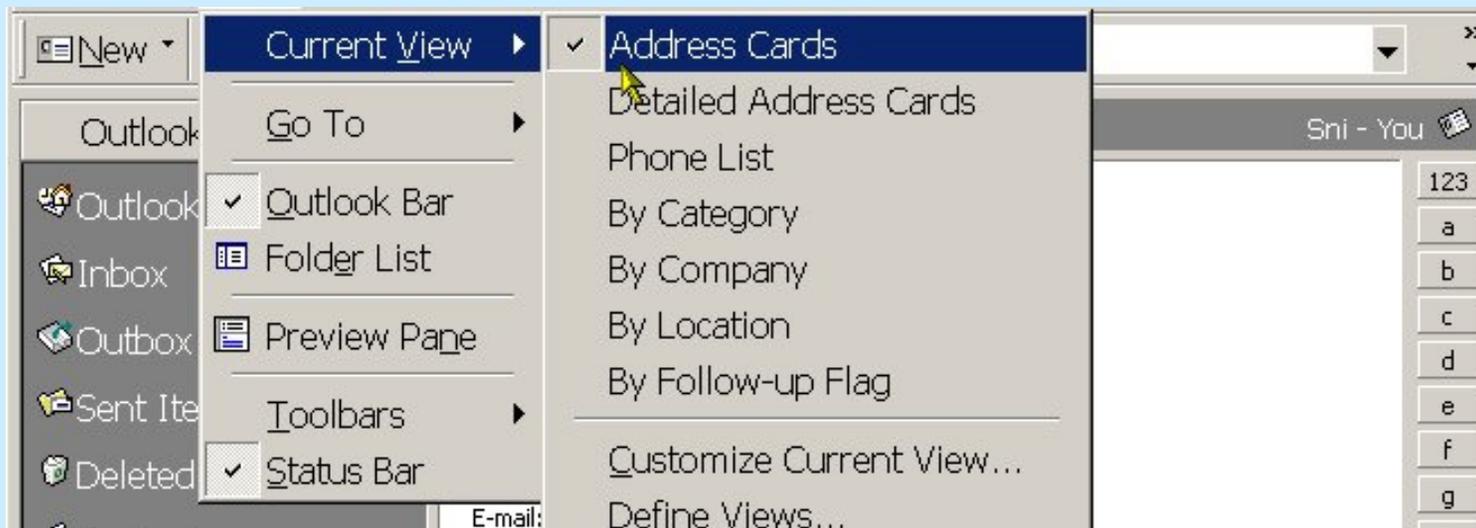
- Full Name...: Mary Jones
- Job title: Secretary
- Company: Oklahoma Dept. of Corrections
- File as: Jones, Mary
- Business: (405) 425-2500
- Home: [Empty]
- Business Fax: [Empty]
- Mobile: [Empty]
- Address...: 3400 Martin Luther King Blvd., P.O. Box 11400, Oklahoma City, OK 73136
- E-mail: mary.jones@doc.state.ok.us
- Web page address: [Empty]

At the bottom of the window, there are fields for "Contacts...", "Categories...", and a "Private" checkbox. A mouse cursor is pointing at the "Save and Close" button in the toolbar.



Viewing Contacts

5. Click on “Contacts” on the Outlook Bar. Click on “View” on the top menu, then click on “Current View.” A sub-menu will open that lists your options for viewing Contacts. In the picture below, I’ve selected “Address Cards.” As you can see, there are several different ways to view your Contacts.



Edit a Contact

Mary Jones - Contact

File Edit View Insert Format Tools Actions Help

Save Close Print Copy Paste Undo Redo

General Details Activities Certificates All Fields

Department: Manager's name:

Office: Assistant's name:

Profession:

Nickname: Birthday:

Spouse's name: Anniversary:

Online NetMeeting settings

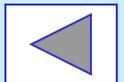
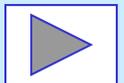
Directory server:

E-mail alias: Call Now

Internet Free-Busy

Address:

1. I want to add a nickname for my contact. I double-clicked the Contact, then clicked the “Details” tab and added the nickname. You can edit any field by selecting the text and re-typing what you wish. Then, click “Save and Close.”

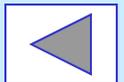
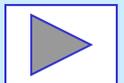


Exit

Delete a Contact



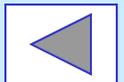
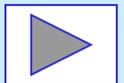
1. Click once on the Contact you wish to delete, to select it.
2. Click on the “X” (delete button) on the icon row directly beneath the main menu bar.
3. Your Contact will be deleted.



Outlook Categories

It is sometimes useful to send an e-mail to a group of people. This is normally done by creating and using a “Personal Distribution List.” However, these lists can be cumbersome to edit. Outlook offers a more convenient way – by using a “Category.” Outlook comes with a group of pre-defined categories, and also allows you to create your own.

In the following lesson, we will learn to create a category, add the category to a group of Contacts, filter Contacts to show everyone in the category, then send a message to all the category members at once. The advantage to this lies in the ease of editing a Contact to remove it from a special category, thereby making it easy to keep your group list up-to-date.

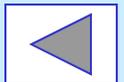
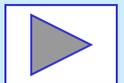


Exit

Create a New Category



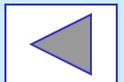
1. Click on “Contacts” on your Outlook Bar.
2. Click on the “Organize” icon directly under the main menu bar. (See picture above.)



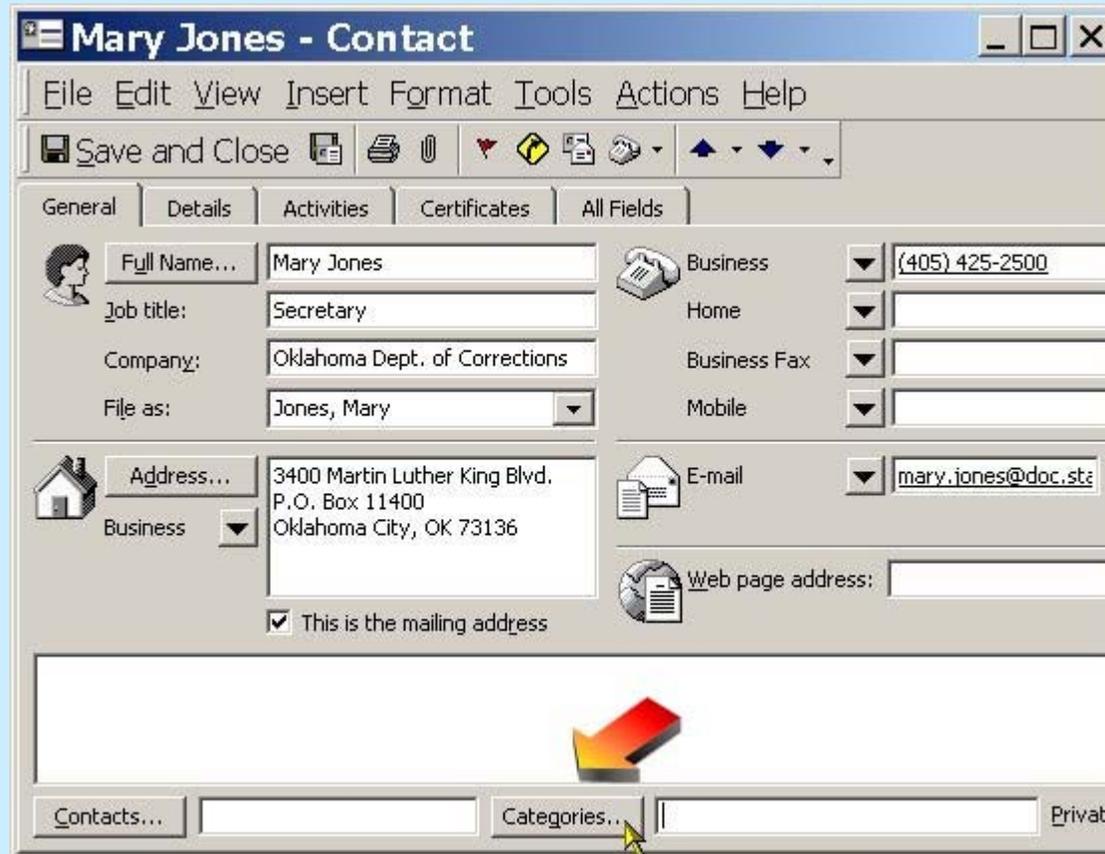
Create a New Category, continued



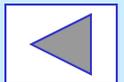
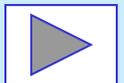
3. Click on “Using Categories”
4. Type in a name for your new category. (I have typed in “Training Group List”, but you can name your category anything you like.) Then, click on the “Create” button.
5. Close the category window by clicking on the small white “x” to the right of the line that says “Ways to Organize Contacts.”



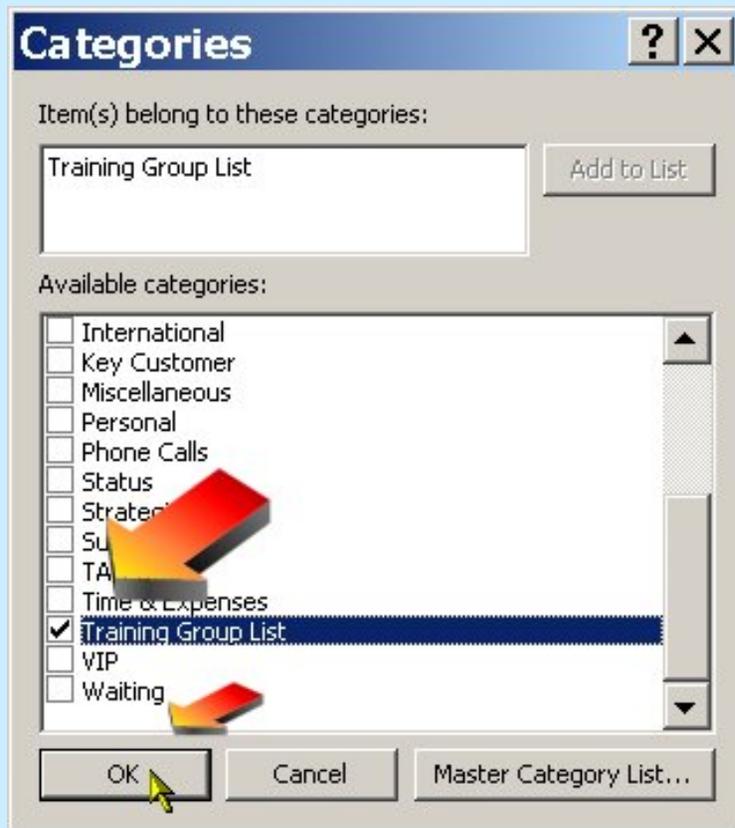
Assign a Category to a Contact



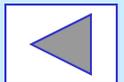
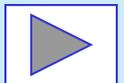
1. Double click on a Contact to open it for editing.
2. Click on "Categories" to open the category list.



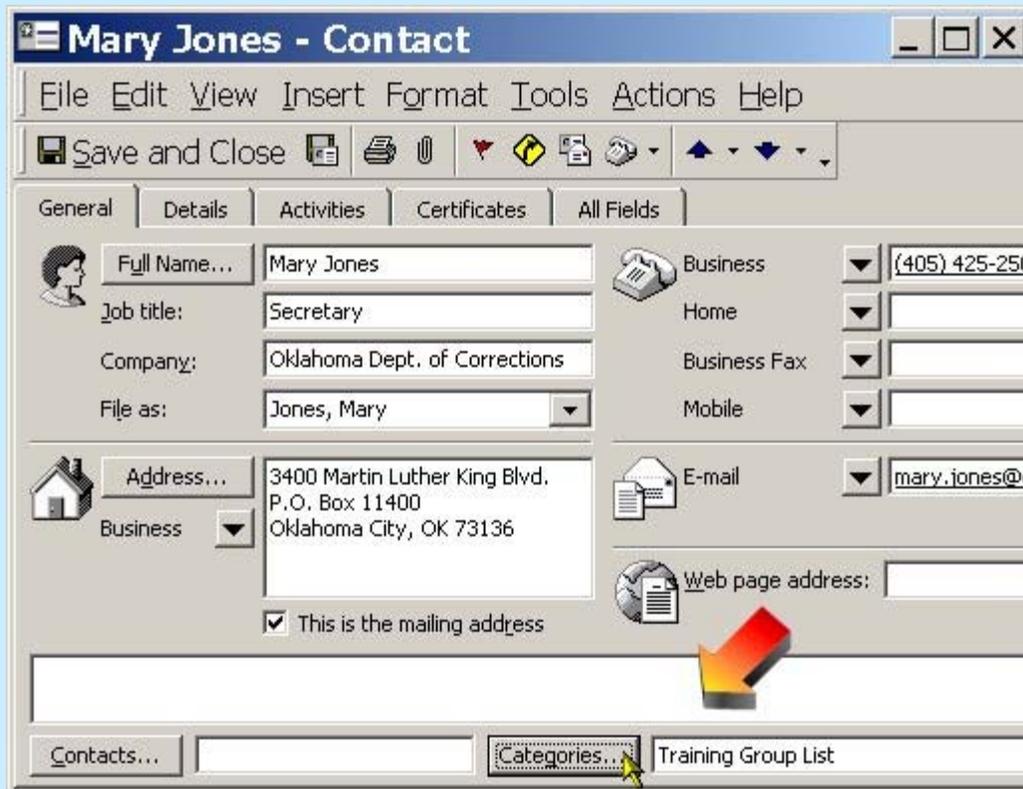
Assign a Category to a Contact, continued



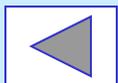
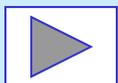
3. Click the box by the category you want to use. (I have clicked “Training Group List”, the category I just created.)
4. Click “OK.”
5. Click “Save and Close” to save your changes to the Contact.



Assign a Category to a Contact, continued



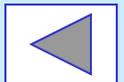
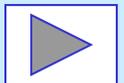
5. Double-click the Contact you added the Category to. Note that the Contact now shows the new category.



Assign a Category to a Contact, continued

6. Using the steps you've learned, create several new Contacts and add them to the new category you've created. (If you wish, use existing Contacts and add them to your new category instead of creating new Contacts.)

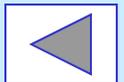
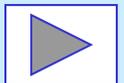
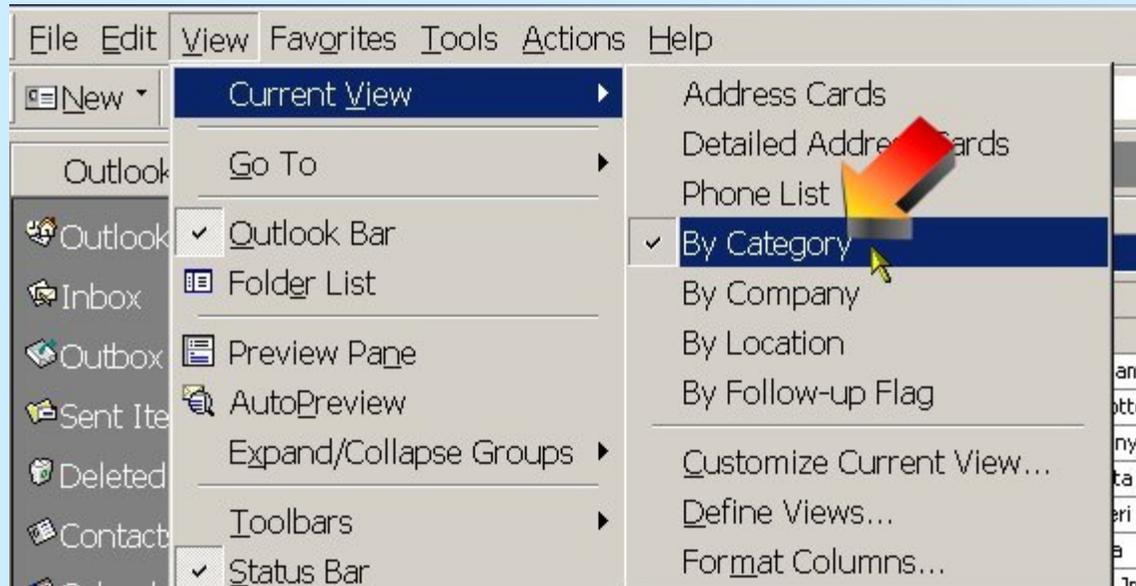
Now that you have several Contacts in the new category, let's proceed with the lesson and learn to filter them.



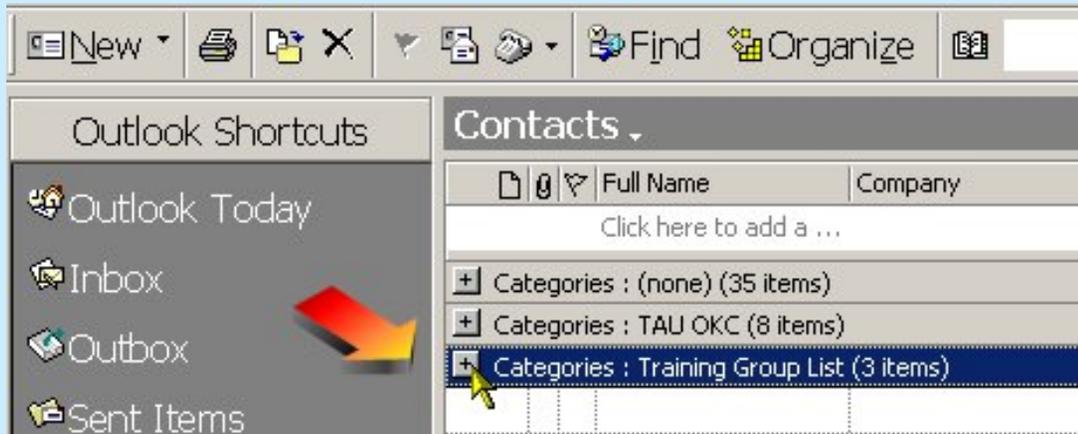
Exit

Filtering Contacts in a Category

1. Click on “Contacts” on your Outlook Shortcut Bar.
2. Click on “View” on the main menu bar, then click on “By Category.”

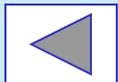
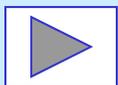
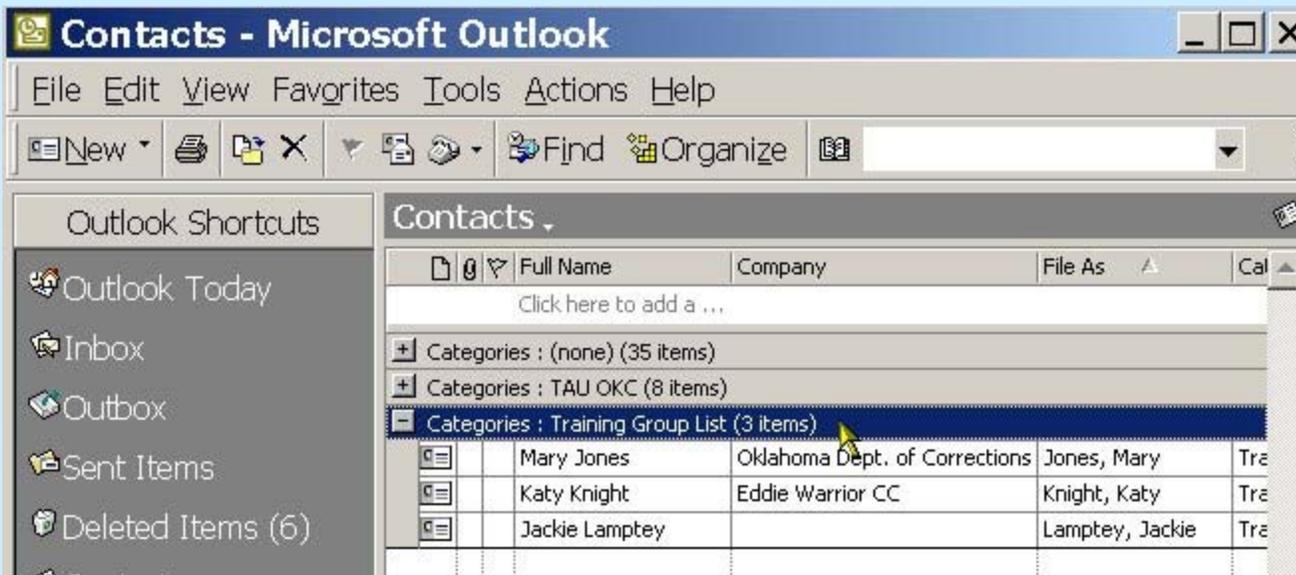


Filtering Contacts in a Category, continued



3. Note the new category I created (“Training Group List”) in the picture to the left.

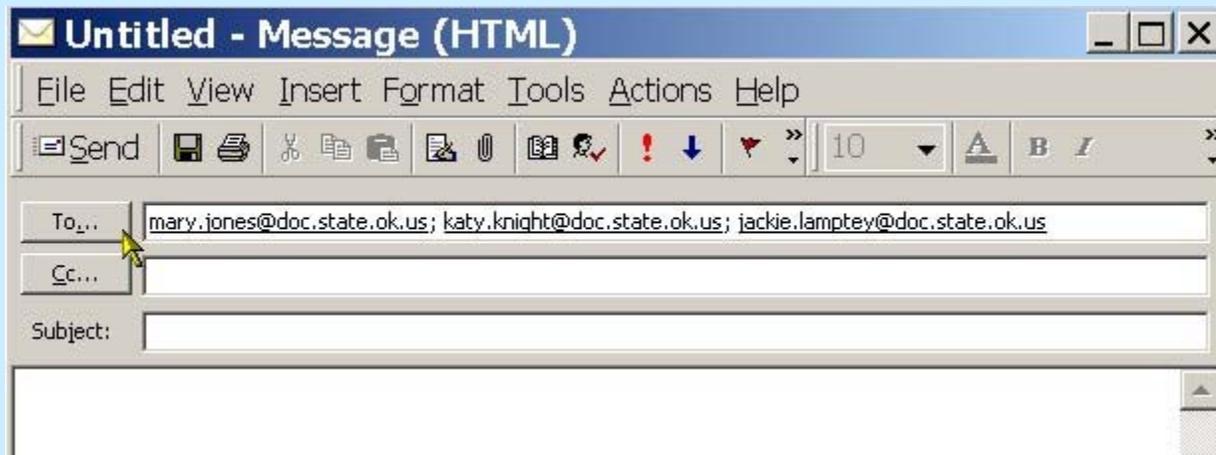
4. Click on the small + to the left of the new category, and all the Contacts in the category will appear.



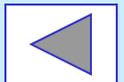
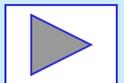
Exit

Sending a Group E-Mail, continued

3. As you can see, Outlook added each e-mail address in the category you selected and inserted them in a new message.



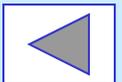
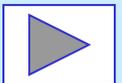
Congratulations! You've created your first group mailing list by using categories.



Multiple Categories

Outlook allows you to add more than one category to a contact. For instance, you can add a Contact to two different mailing lists by using a second category for that Contact.

Example: I have added Mary Jones, the Contact I've used as an example in this course, to my "Training Group List" category. Now, I want to make a new category called "Newsletter" so that I can e-mail a monthly publication to all members in that category. I want to add Mary Jones to this new category. Here's how to do it (see the next slide):



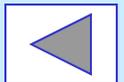
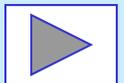
Multiple Categories, continued

1. Create a new category called “Newsletter.”

NOTE: Remember that we learned how to create a new category earlier in this course. If you need to view the steps again, go back to slide 13, titled “Create a New Category.”

2. Double-click on the Contact you want to add to the new category. Click on the Category button, and click to select “Newsletter.” Click OK, then click “Save and Close.”

NOTE: Go back to slide 15, titled “Assign a Category to a Contact”, if you need to review the steps.



Multiple Categories, continued

3. The picture below shows that Mary Jones is now listed in two different categories: “Newsletter” and “Training Group List.”

Mary Jones - Contact

File Edit View Insert Format Tools Actions Help

Save and Close

General Details Activities Certificates All Fields

Full Name... Mary Jones

Job title: Secretary

Company: Oklahoma Dept. of Corrections

File as: Jones, Mary

Address... 3400 Martin Luther King Blvd.
P.O. Box 11400
Oklahoma City, OK 73136

Business (405) 425-2500

Home

Business Fax

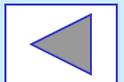
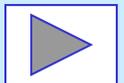
Mobile

E-mail mary.jones@doc.sta...

Web page address:

This is the mailing address

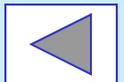
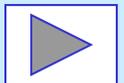
Categories... Newsletter, Training Group List Private



Exit

Viewing Multiple Categories

1. Click on “Contacts” on your Outlook Bar, then click on “View”, then click on “Current View”, then “By Category.”
2. Click on the small + signs by each category, and you can view all members of that category. As you can see in the picture below, Mary Jones is now in the “Newsletter” category AND the “Training Group List” category.



Exit

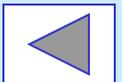
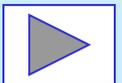
Use What You've Learned: Ideas

As you can see, sorting Contacts by categories can help you to organize your activities and communicate quickly and efficiently.



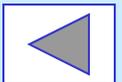
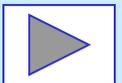
Some Ideas for Categories:

Committees
Work Groups
Mailing Lists
Project Teams



Exit Page

Thank you for taking this online course. To return to the Online Courses main page, click the "Exit" button at the bottom right corner of this slide. When you return to the Online Courses main page, be sure to print a course roster, fill in the information, and give the roster to your training officer so that you'll receive credit for this course. (The link for the course roster is directly beneath the link to this course.)



Exit