8

Outlook Settings to Change

Outlook provides many, many settings that control the way the program works and looks. You will probably never touch some of those settings, and many you'll change very seldom. This chapter focuses on the most common settings you're likely to want to change. These settings control many different Outlook features, from email to scheduling.

# Controlling When and How Outlook Checks Your Mail

Outlook uses *send/receive groups* to determine which accounts to check and when to check them. Outlook includes a predefined send/receive group named All Accounts that includes all the email accounts in your profile. You can change the settings for this group or create other groups to handle accounts separately, if you want.

It's likely that, at least at first, you will only need one send/receive group. Therefore, this section focuses on how to edit the existing All Accounts group. Here's how you edit send/receive groups:

1. In Outlook, choose Tools, Send/Receive, Send/Receive Settings, Define Send/Receive Groups. The Send/Receive Groups dialog box appears (see Figure 8.1).

FIGURE 8.1

Use the Send/Receive Groups dialog box to configure email send/receive settings.
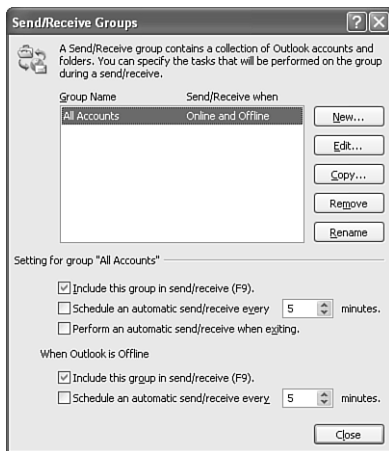
2. Click All Accounts and then click Edit. The Send/Receive Settings - All Accounts dialog box appears (see Figure 8.2).

3. Click an email account in the left pane, select Include the Selected Account in This Group, and then use the remaining options to specify the types of actions to perform (send, receive, and so on).

4. Click the next account and configure its settings. When you're done configuring account settings, click OK.
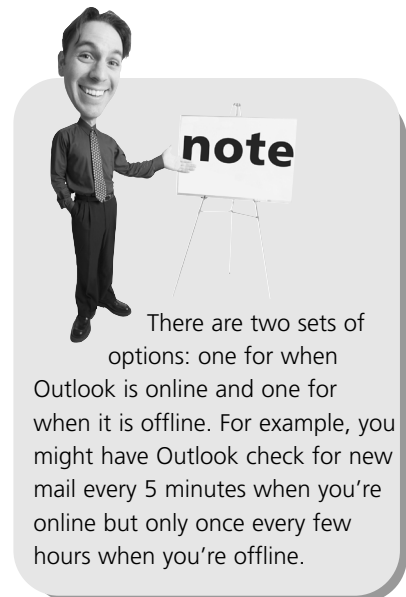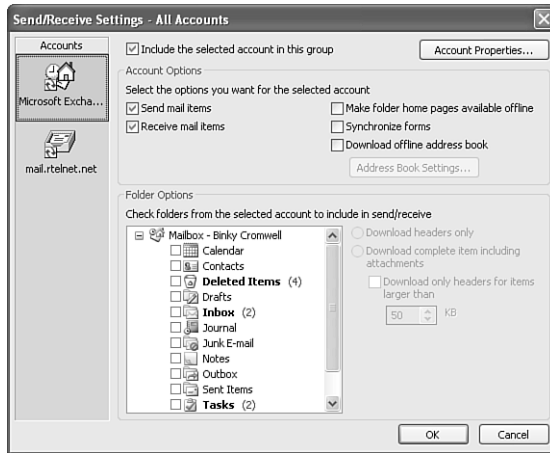
note There are two sets of options: one for when Outlook is online and one for when it is offline. For example, you might have Outlook check for new mail every 5 minutes when you're online but only once every few hours when you're offline.

FIGURE 8.2

You can config-
ure each account
with different
settings within a
group.

5. Back on the Send/Receive Groups dialog box, choose from the following
   options, as needed:

   ■ **Include This Group in Send/Receive**—When this option is selected,
     Outlook processes the selected group when you click Send/Receive on
     the toolbar or press F9.

   ■ **Schedule an Automatic Send/Receive Every**—When this option is
     selected, Outlook automatically sends and checks for new mail every *n*
     minutes.

   ■ **Perform an Automatic Send/Receive When Exiting**—When this
     option is selected, Outlook sends outgoing mail and checks for new
     mail when you exit Outlook.

6. Click Close to close the Send/Receive
   Groups dialog box.

Outlook processes send/receive groups when you
click Send/Receive on the toolbar. You can also
select Tools, Send/Receive and then choose a spe-
cific account to process only that one account.

Creating Custom Views

You might have already guessed that you can
create your own views to suit your needs. You can
either modify an existing view or define a new

tip

Choose Tools, Options and
then click the Mail Setup tab
and turn off the option Send
Immediately When
Connected if you want mes-
sages to stay in your
Outbox until the next
send/receive. Otherwise, messages
are delivered immediately.

one. You probably won't need to create custom views right away, so I don't cover that in detail. Instead, I just point you in the right direction so you can experiment on your own.

To change the current view, click Customize Current View in the Navigation pane or choose View, Arrange By, Current View, Customize Current View. The Customize View dialog box that appears (see Figure 8.3) includes several buttons:

FIGURE 8.3

You use the Customize View dialog box to create a custom view.
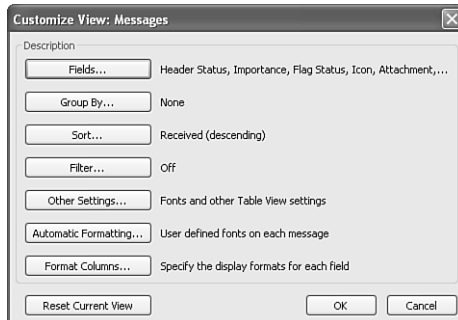
- **Fields**—You can click this button to choose the fields that will appear in the view and the order in which they appear.

- **Group By**—You can click this button to group items together. For example, you can group contacts by company to create a company-specific phone list.

- **Sort**—You can click this button to change the order by which items are sorted for display in the folder. You can sort by multiple criteria.

- **Filter**—You can click this button to create a filter to view only the items that meet the filter conditions. For example, you can view only contacts with addresses in Colorado.

- **Other Settings**—You can click this button to change the fonts used for column and row labels, choose a grid line style, and make other general settings.

- **Automatic Formatting**—You can click this button to display items in a font you specify if they match a certain condition. For example, you can use a red header for messages from your boss and gray for junk mail.

- **Format Columns**—You can click this button to change the way each column appears, including its name (such as changing From to Sender).

- **Reset Current View**—You can click this button to reset the current view back to its default settings.

Customizing the Navigation Pane

By default, the Navigation pane includes a button for most of the Outlook folders, and shows the folder list and a few other items that change with the selected folder. You can customize the Navigation pane to add other folders, add shortcuts to Web sites or local file folders, and so on.

To add or remove standard folder buttons, click Configure Buttons at the bottom right of the Navigation pane, click Add or Remove Buttons, and select the folders you want displayed.

You can also add or remove shortcuts from the Shortcuts section of the Navigation pane. To view the Shortcuts section, click the Shortcuts button on the Navigation pane.

tip

Right-click any button in the Navigation pane and choose Navigation pane Options to add or remove buttons.
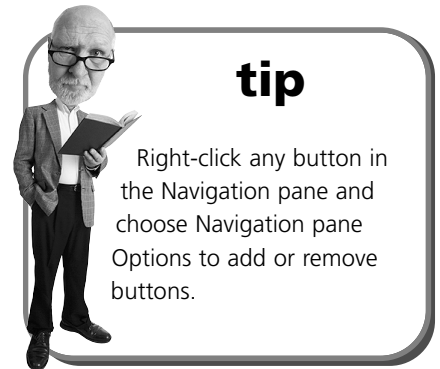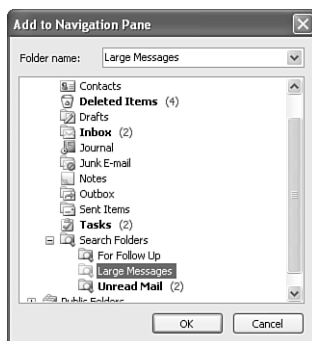
Adding Outlook Shortcuts

Follow these steps to add your own shortcuts to the Navigation pane:

1. Click the Shortcuts button to display the Shortcuts area of the Navigation pane.

2. Click the Add New Shortcut link to open the Add to Navigation Pane dialog box, shown in Figure 8.4.

FIGURE 8.4

Select the folder to which you want to add a shortcut.

3. Select an Outlook folder, a search folder, or a public folder from the list and click OK. Outlook adds the shortcut to the Shortcuts group.

You can also add your own groups to help organize your shortcuts:

1. Click the Add New Group link on the Navigation pane. Outlook adds a new group named New Group and highlights the name.

2. Type a new name for the group and press Enter.

After you create a new group, it's easy to add shortcuts to the new group. You can drag existing shortcuts from another group and drop them on the group name where you want the group to be located. Or you can right-click the group, choose Add New Shortcut from the pop-up menu, and add a shortcut as explained previously. Outlook adds the shortcut to the selected group rather than to the default Shortcuts group.

Adding Other Types of Shortcuts

Outlook doesn't offer a direct way to add shortcuts to Internet Web sites, local folders or documents, or other non-Outlook folders, but you can use drag-and-drop to add shortcuts to these items. Follow these steps to add shortcuts from the Internet Explorer Favorites folder to Outlook:

1. Open Internet Explorer and click Favorites on the toolbar to open the Favorites folder in the Explorer Bar (or choose View, Explorer Bar, Favorites).

2. Position Internet Explorer and Outlook so that you can see the Favorites folder in Internet Explorer and the Navigation pane in Outlook.

3. Click and drag Internet shortcuts from the Favorites folder to a shortcut group in Outlook.

You can use a similar method to create shortcuts to document folders such as My Documents. Just open Windows Explorer, locate the folder for which you want to create a shortcut, and drag it to a shortcut group in Outlook.
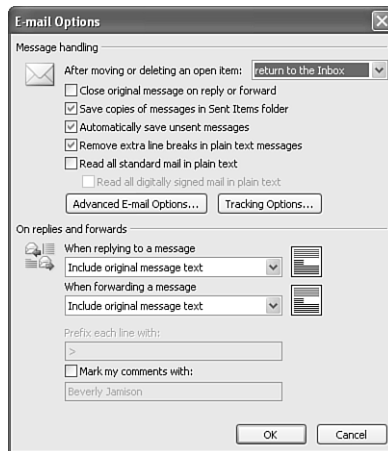
Setting How Outlook Handles Text for Replies and Forwards

Outlook automatically includes the original message content when you reply to or forward an email message. However, Outlook doesn't apply any special formatting, such as indention, for replies or forwards. You can configure Outlook to omit the original message, attach it, indent it, and so on. You can also have Outlook prefix each line of the original with a character (such as >) and add your name or other text in your replies.

Choose Tools, Options to open the Options dialog box. Then click E-mail Options on the Preferences tab to open the E-mail Options dialog box (see Figure 8.5), where you can change these settings.

FIGURE 8.5
Use the E-mail Options dialog box to configure reply and forward options.

Use the On Replies and Forwards group of controls to change how Outlook handles replies and forwards.

# Changing How Outlook Notifies You of New Messages

Outlook does several things to let you know when a new message comes in, such as play a sound and display a desktop alert.

Choose Tools, Options to open the Options dialog box. Then select E-mail Options on the Preferences tab and Advanced E-mail Options to open the Advanced E-mail Options dialog box (see Figure 8.6).

You can use the four options in the When New Items Arrive in My Inbox group to specify what action(s) Outlook should take when a new message arrives. If you don't like Outlook 2003's new desktop alerts, click Desktop Alert Settings to open the Desktop Alert Settings dialog box to set the length of time and transparency for the alert.
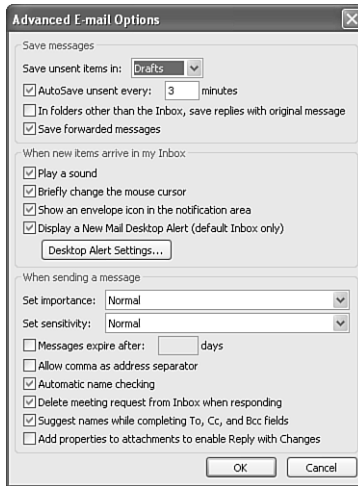
Setting the Default Mail Format and Editor

The default mail format for new messages is Hypertext Markup Language (HTML), and Outlook uses Word as the default message editor. I personally don't like either one. Some of the people I know prefer not to receive HTML messages, and I don't need the editing features in Word when I compose email.

Whatever your preferences, you can change the default mail format and editor. Choose Tools, Options to open the Options dialog box, and then select the Mail Format tab (see Figure 8.7).

Use the Compose in This Message Format drop-down list box to choose your desired format (HTML, rich text format [RTF], or plain text). Use the two check boxes under this list box to specify whether you want to use Word to compose new messages and read RTF messages. Outlook uses its own forms if you clear these check boxes.

note

Keep in mind that a witty saying isn't so witty the 753rd time you see it in a message.

Adding a Signature Block to Messages

You might want to include your contact information, a disclaimer, or a witty saying at the bottom of each message you send. You don't need to type it manually each time; you can use a signature instead. Here's how you create a signature:

1. Choose Tools, Options. The Options dialog box appears. Select the Mail Format tab.
2. Select an account from the Select the Signatures to Use with the Following Account drop-down list box.
3. Click Signatures and then click New.
4. Enter a name for the signature and click Next.
5. Type the signature text, format it, and click Finish.
6. Add other signatures, as needed, and click OK.
7. Choose a signature from the Signature for New Messages list box, and choose a signature from the Signature for Replies and Forwards drop-down list box.
8. Click OK.
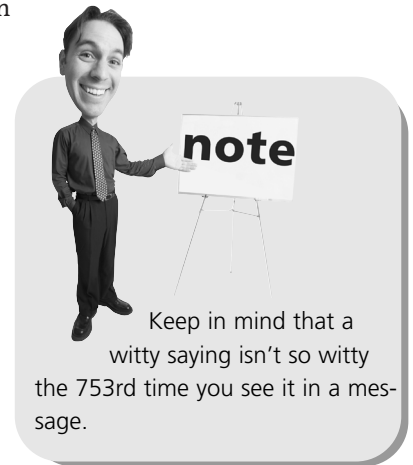
Changing the Reminder Sound and Default Time

Outlook defaults to a 15-minute reminder and uses the `Reminder.wav` file for an audible reminder. You can change the default reminder lead time and use a different sound file.

You can set the default reminder time on the Preferences tab of Outlook's Options dialog box (which you access by choosing Tools, Options). To change the sound, click the Other tab in the Options dialog box. Then click Advanced Options and click Reminder Options to open the Reminder Options dialog box. Next, click Browse

and select a different sound file. Or you can clear the Play Reminder Sound option if you don't want Outlook to play a reminder sound.

Turning Instant Messaging On and Off

Outlook 2003 provides some integration with Microsoft Windows Messenger, which is the chat and conferencing program included with Windows 2000 and later versions of Windows. For example, Outlook can show you the online/offline status of your Windows Messenger contacts in the Inbox when you click a message from a contact listed in your Messenger contacts. Outlook can also display a Person Names smart tag in certain forms, which helps you quickly perform certain messaging-related actions for the contact, such as starting a chat session.

You can find the options that enable/disable these two features in the Person Names group on the Other tab of the Options dialog box (which you access by choosing Tools, Options).

Setting Calendar Week and Weekend Options

Outlook assumes that Monday through Friday is your work week and displays the Calendar folder accordingly (for example, compressing Saturday and Sunday into one column). You can change your work days and set the start of your work week, your work day (which also affects the Calendar folder and appointment default settings), and first week of the year.

To make changes to week and weekend options, choose Tools, Options to open the Options dialog box. Then click Calendar Options on the Preferences tab to open the Calendar Options dialog box (see Figure 8.8).

FIGURE 8.8

Set your work week and other calendar options in the Calendar Options dialog box.
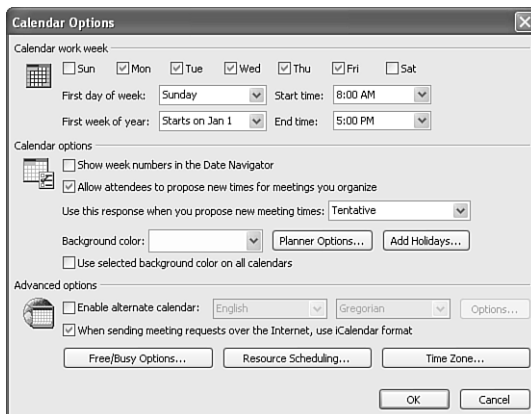
This dialog box includes three option groups:

- **Calendar Work Week**—With this group you can set the work week, daily start and end time, first day of the week, and first week of the year.
- **Calendar Options**—With this group you can set colors and other options for your Calendar folder and options for the Date Navigator (that is, the small calendar).
- **Advanced Options**—With this group you can use a non-Gregorian calendar and/or a different language. You can also set free/busy time, resource scheduling, and time zone options.

Controlling How Outlook Saves and Displays Contact Names

By default, Outlook shows contacts' full names in the form *First Middle Last*. It files contacts by using the format *Last, First*. You can change these options if you prefer a different way of displaying contacts.

To control how Outlook displays contact names, choose Tools, Options to open the Options dialog box. Then click Contact Options on the Preferences tab (see Figure 8.9) and make any needed changes.

FIGURE 8.9

Use the Contact Options dialog box to control how Outlook displays contact names.
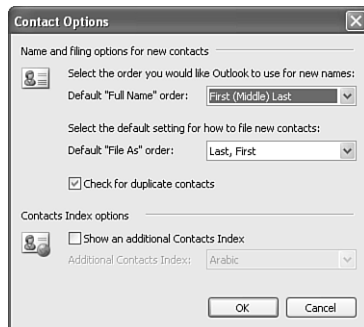
You can also choose to show an additional index in a different language.

Follow these steps to change the way Outlook sorts contact names:

1. Choose Tools, E-mail Accounts to start the E-mail Accounts Wizard.
2. Choose View or Change Existing Directories or Address Books and click Next.
3. Select the address book and click Change to open the Microsoft Outlook Address Book dialog box (see Figure 8.10).

4. Choose First Last (John Smith) to sort names by first name and last name or choose File As (Smith, John) to sort based on the File As format specified in the Contact Options dialog box.

THE ABSOLUTE MINIMUM

As with all the other Office programs, Outlook provides many settings and options you can use to control the way the program looks and functions. You can access most of these options from the Options dialog box, which you open by choosing Tools, Options.

There are many other settings that you can change that aren't discussed here. Take some time to review the other tabs in the Options dialog box and the options they contain to decide what other settings you might want to change.

This chapter finishes our look at Outlook. In the next part of the book, you'll begin to learn about Microsoft Word, which you can use to create a rich variety of documents.