

Outlook XP

Manual - Foundation Level



SAMPLE

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COURSEWARE

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INTRODUCTION TO OUTLOOK 2002.....	7
WHAT IS OUTLOOK 2002?.....	7
<i>Outlook 2002.....</i>	7
<i>Delivery.....</i>	8
<i>Setting up Outlook 2002 to send and receive emails.....</i>	8
CREATING MESSAGES	8
<i>Creating a Message.....</i>	8
<i>Setting Message Formats.....</i>	9
<i>Attaching a File to a Message.....</i>	10
<i>Using Rules.....</i>	11
<i>Using the Rules Wizard.....</i>	12
<i>Adding a Signature to a Message.....</i>	18
<i>Organizing Messages with Color.....</i>	20
<i>Checking the Spelling and Grammar.....</i>	20
MAIL CUSTOMIZATION	22
<i>Using Message Stationary.....</i>	22
<i>Customizing Stationary.....</i>	25
<i>Modifying Message Formats.....</i>	25
<i>Modifying the Settings.....</i>	26
<i>Modifying Delivery Options.....</i>	27
OPENING AND REPLYING	28
<i>Opening and Reading a Message.....</i>	28
<i>Opening an Attachment.....</i>	30
<i>Saving an Attachment.....</i>	31
<i>Replying to a Message.....</i>	32
<i>Forwarding a Message.....</i>	32
<i>Selecting a Message Recipient.....</i>	33
<i>Marking Messages Unread.....</i>	34
<i>Using the Preview pane Options – Marking Messages Read.....</i>	34
<i>Recalling a Message.....</i>	35
<i>Deleting a Message.....</i>	36
REVIEW QUESTIONS	37
OUTLOOK 2002 INTERFACE.....	38
OUTLOOK 2002 WORKSPACE.....	38
<i>Using the Main Menu.....</i>	38
<i>Using the Standard Toolbar.....</i>	39
<i>Using the Advanced Toolbar.....</i>	40
<i>Using Outlook Shortcuts.....</i>	40
<i>Using My Shortcuts.....</i>	42
<i>Using Other Shortcuts.....</i>	43
<i>Using the Office Assistant.....</i>	44
CUSTOMIZE OUTLOOK TODAY.....	44
<i>Customizing Outlook Today.....</i>	44
<i>Customizing the Toolbar.....</i>	46
<i>Creating a new Toolbar.....</i>	47
<i>Creating Custom Views.....</i>	48
<i>Adding Additional Time Zones.....</i>	50
REVIEW QUESTIONS	52
THE TOOLBARS	53
THE STANDARD TOOLBAR.....	53
<i>Using the New Mail Message Pull-down Menu.....</i>	53

Using the <i>Print</i> button.....	54
Using the <i>Move to Folder</i> button.....	54
Using the <i>Delete</i> button.....	54
Using the <i>Reply</i> button.....	55
Using the <i>Reply to All</i> button.....	55
Using the <i>Forward</i> button.....	55
Using the <i>Send and Receive</i> button.....	55
Using the <i>Find</i> button.....	56
Using the <i>Organize</i> button.....	56
Using the <i>Address Book</i> button.....	56
Using the <i>Find a Contact</i> field.....	56
Using the <i>Help</i> button.....	57
Using the <i>Outlook Today</i> Toolbar.....	57
Using the <i>Back</i> button.....	57
Using the <i>Forward</i> button.....	57
Using the <i>Web Search</i> Feature.....	57
Using the <i>Go</i> button.....	58
Using the <i>Stop</i> button.....	58
Using the <i>Refresh</i> button.....	58
Using the <i>Message</i> Toolbars.....	58
Using the <i>Plain Text</i> Message Toolbar.....	58
Using the <i>HTML</i> Message toolbar.....	59
Using the <i>Rich Text</i> Message toolbar.....	59
THE ADVANCED TOOLBAR.....	59
Using the <i>Advanced</i> Toolbar.....	59
Using the <i>Outlook Today</i> button.....	59
Using the <i>Back</i> button.....	60
Using the <i>Forward</i> button.....	60
Using the <i>Up One Level</i> button.....	60
Using the <i>Folder List</i> button.....	60
Using the <i>Preview Pane</i> button.....	61
Using the <i>Print Preview</i> button.....	61
Using the <i>Undo</i> button.....	61
Using the <i>Rules Wizard</i> button.....	62
Using the <i>Current View</i> field.....	62
Using the <i>Group By Box</i> button.....	62
Using the <i>Field Chooser</i> button.....	64
Using the <i>AutoPreview</i> button.....	64
OUTLOOK SHORTCUTS.....	64
Using <i>Outlook Shortcuts</i>	65
Using the <i>Outlook Today</i> button.....	65
Using the <i>Calendar</i> button.....	65
Using the <i>Contacts</i> button.....	65
Using the <i>Tasks</i> button.....	65
Using the <i>Notes</i> button.....	66
Using the <i>Deleted Items</i> button.....	66
MY SHORTCUTS.....	66
Using <i>My Shortcuts</i>	66
Using the <i>Inbox</i> button.....	66
Using the <i>Drafts</i> button.....	66
Using the <i>Journal</i> button.....	67
Using the <i>Outlook Update</i> button.....	67
OTHER SHORTCUTS.....	67
Using <i>Other Shortcuts</i>	67
Using the <i>My Computer</i> button.....	67
Using the <i>My Documents</i> button.....	68

<i>Using the Favorites button</i>	69
REVIEW QUESTIONS	69
CONTACTS	70
THE CONTACT LIST	70
<i>Using the Contact List</i>	70
<i>Adding a Contact</i>	70
<i>Finding a Contact</i>	71
<i>Editing a Contact</i>	72
<i>Sorting Contacts</i>	72
<i>Creating a Distribution List</i>	72
REVIEW QUESTIONS	74
TASKS	75
TASK MANAGEMENT	75
<i>Adding a Task</i>	75
<i>Update a Task</i>	78
<i>Editing a Task</i>	78
<i>Sorting Tasks</i>	78
<i>Assigning a Task</i>	78
REVIEW QUESTIONS	80
NOTES AND JOURNAL	81
NOTES DEVELOPMENT	81
<i>Using Notes</i>	81
<i>Creating a Note</i>	81
<i>Moving a Note</i>	83
<i>Assigning Contacts to a Note</i>	83
<i>Resizing a Note</i>	84
<i>Assigning Categories to a Note</i>	85
THE JOURNAL.....	86
<i>Using the Journal</i>	86
<i>Creating New Journal Entries</i>	87
REVIEW QUESTIONS	88
MANAGEMENT	89
MESSAGE MANAGEMENT	89
<i>Sorting Messages</i>	89
<i>Moving Messages between Folders</i>	90
<i>Searching for Messages</i>	91
FOLDER MANAGEMENT	92
<i>Creating a New Folder</i>	92
<i>Moving Folders</i>	93
<i>Using Offline Folders</i>	94
<i>Synchronizing Folders</i>	96
<i>Deleting a Folder</i>	97
REVIEW QUESTIONS	97
MEETINGS, APPOINTMENTS AND EVENTS.....	98
APPOINTMENTS.....	98
<i>Using Appointments</i>	98
<i>Adding an Appointment to the Calendar</i>	98
<i>Inviting Attendees</i>	101
<i>Editing an Appointment</i>	102
<i>Setting Recurring Appointments</i>	102

<i>Assigning a Category to an Appointment</i>	103
<i>Deleting an Appointment</i>	104
EVENTS.....	104
<i>Using Events</i>	104
<i>Scheduling an Event</i>	105
<i>Using Permissions</i>	106
<i>Setting Permissions</i>	107
<i>Viewing Other User's Calendars</i>	107
MEETINGS.....	108
<i>Using Meetings</i>	108
<i>Scheduling a Meeting</i>	108
<i>Changing an Existing Meeting</i>	109
<i>Replying to a Meeting Request</i>	110
<i>Suggesting a New Meeting Time</i>	111
<i>Tracking Meeting Responses</i>	111
<i>Updating a Meeting</i>	111
<i>Canceling a Meeting</i>	111
REVIEW QUESTIONS.....	112
OUTLOOK AND THE WEB.....	113
NEWSGROUPS.....	113
<i>Using Newsgroups</i>	113
<i>Subscribing to a Newsgroup</i>	114
<i>Reading Newsgroup Messages</i>	115
INSTANT MESSENGER.....	115
<i>Using Instant Messenger</i>	115
NETMEETING.....	116
<i>Using NetMeeting</i>	117
<i>Setting up NetMeeting</i>	117
CALENDAR.....	118
<i>Saving a Calendar as a Web Page</i>	118
REVIEW QUESTIONS.....	118
SAVING AND ARCHIVING.....	120
SAVE.....	120
<i>Saving Messages</i>	120
<i>Saving in Alternate File Formats</i>	120
ARCHIVE.....	121
<i>Archiving Messages Automatically</i>	121
<i>Archiving Messages Manually</i>	123
<i>Protecting Personal Folders</i>	123
REVIEW QUESTIONS.....	123

SAMPLE

Introduction to Outlook 2002

When you have completed this learning module you will have seen how to:

- Create Messages
- Set Message Formats
- Attach Files to a Message
- Use Rules
- Use the Rules Wizard
- Add a Signature to a Message
- Organize Messages with Color
- Check Spelling and Grammar
- Use Message Stationery
- Customize Stationery
- Modify Message Formats
- Modify Settings
- Modify Delivery Options
- Open and Read a Message
- Open an Attachment
- Save an Attachment
- Reply to Messages
- Forward Messages
- Select Message Recipients
- Mark Messages as Unread
- Use the Preview Pane Options
- Mark Messages as Read
- Mark all Messages as Read
- Recall a Message
- Delete a Message

What is Outlook 2002?

Outlook 2002

- **Outlook 2002** is a fully integrated email system that allows you to have accounts for Internet, Exchange Server and Hotmail emails, and enables you to be a client for alternate messaging systems.
- **Outlook 2002** can be used as a time-tracking tool, with calendar, contents and tasks – as well as a full email system, with access to web sites and Internet newsgroups.

Delivery

- **Outlook 2002** will run on most versions of Windows. Email messages can be sent in HTML, Rich Text or Plain Text formats. Depending on the size, files from most outside applications can be attached to an email.

Setting up Outlook 2002 to send and receive emails

- To send and receive email messages with Outlook 2002 you will need an email account and Internet access.
- Contact your Administrator or your Internet service provider (ISP) to get connected.

Creating Messages

Creating a Message

- You can create general messages with attachments in **Outlook**, and from within **Microsoft Word**.

NOTE: Using **Word** to send a message allows you to use the capabilities within **Word**, (like justification and borders) that are not available through **Outlook**. Sending email messages through **Word** is practical when a current document needs to be sent. Rather than moving between applications, it can be more convenient to send via **Word**.

There are two ways to create a new mail message using Outlook:

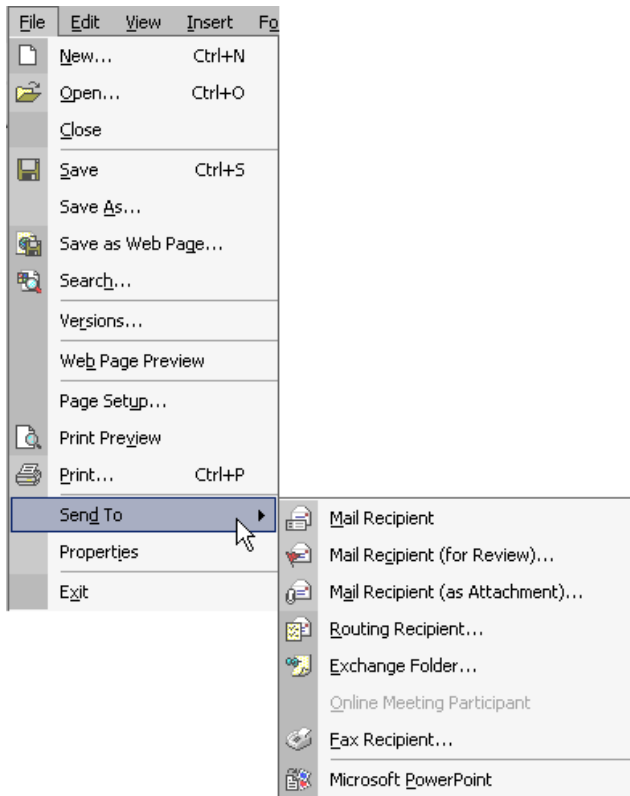
- Click the **New** button in the **Outlook** toolbar to open a new message box:



OR click on the arrow beside the **New** button to open the full drop-down menu, and select **Mail Message**:



- To use **Word** for sending an email, choose **File > Send To** from the main menu, and select the required destination:



Setting Message Formats

- The three formats that are typically used within an Outlook email:

HTML

Rich Text

Plain Text

NOTE: The default setting for Outlook messages is **HTML**.

- **HTML** - Enables you to create formatted pages containing pictures, animated graphics, horizontal lines or multimedia files. A background design can also be set for the messages. However, not all email programs can read the HTML format.
- **Rich Text** - Enables you to set font, font sizes, font colors and format paragraphs. Objects and pictures can be embedded in the text. This is the standard **Exchange** format, so it can be used when **Outlook** is being used as an **Exchange** client.

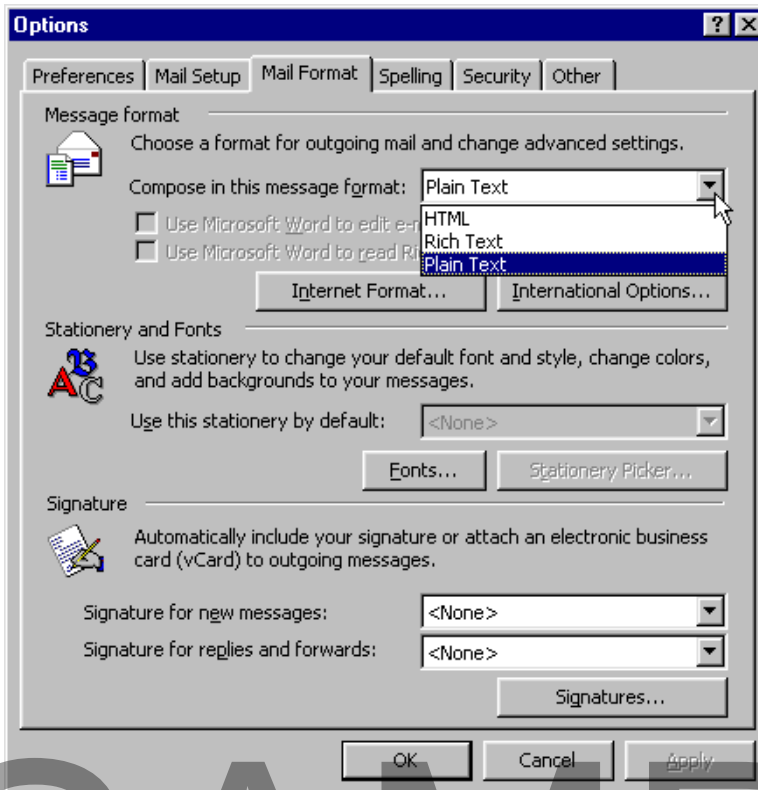
NOTE: This format should not be used to send emails with attachments to anyone not using **Outlook** or **Windows Messaging**, because the attachment

will not be accessible.

- **Plain Text** – Allows you to send basic emails with unformatted text in the body of the email. Files and Outlook items can be attached. This is typically the best format, as it is accessible and readable by all other email applications.

To set the Mail Format in the Mail Format dialog box:

- From the main menu, choose **Tools > Options** to open the **Options** dialog box, and click on the **Mail Format** tab:



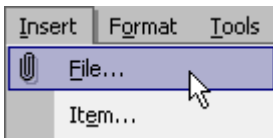
- The **Compose in this message format** drop-down field allows you to set how all messages will be formatted.

Attaching a File to a Message

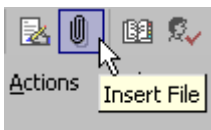
- Not only can **character sets, images, sounds and files** be attached to a message, other Outlook items can be inserted into the body of a message as well.

To attach a file to a message:

- From the message's menu bar, choose **Insert > File**:

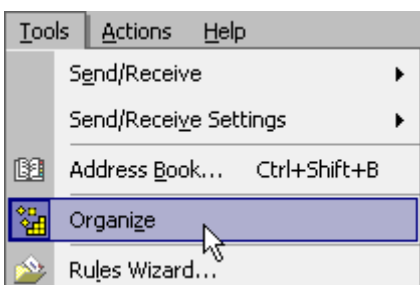


OR click on the **Paperclip** icon within the message menu bar:

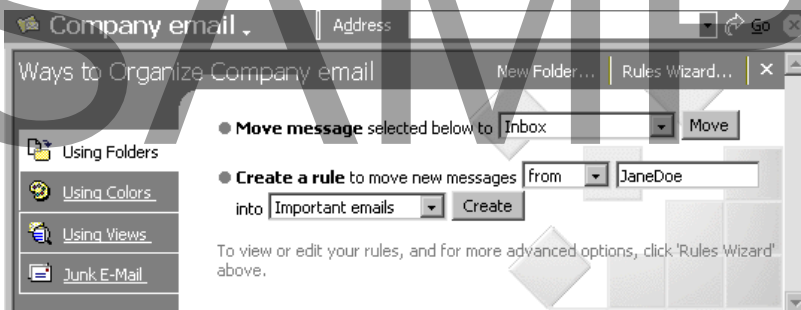


Using Rules

- **Rules** consisting of actions, conditions and exceptions can be set within Outlook to shape how messages and other items are organized.
- **Actions** - Sets what a rule will do.
- **Conditions** - Sets which items the rule is applied to.
- **Exceptions** - Sets certain instances when the rule may not be applied.
- Basic rules can be created from the main menu when you are in a message folder, by choosing **Tools > Organize**:



- This will open the **Ways to Organize Inbox** area in the top portion of the **Message Information** panel:



To create a simple rule:

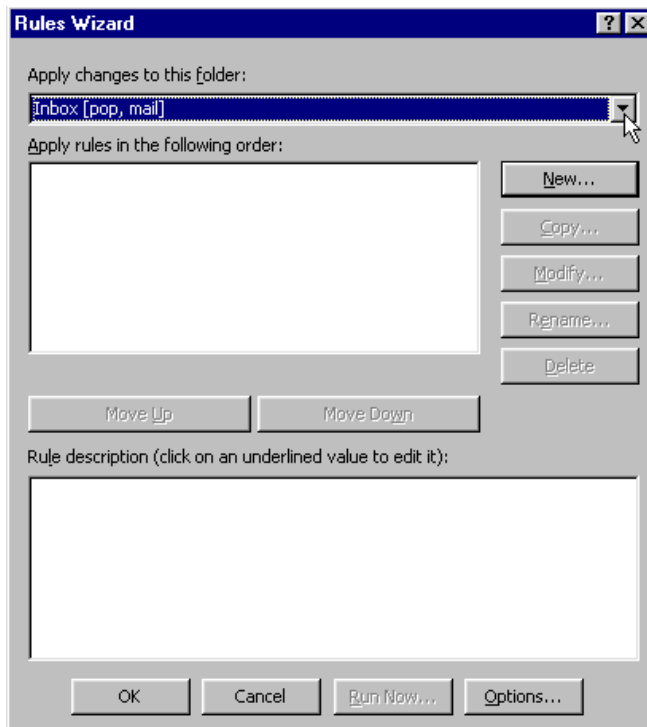
- In the first **Create a rule** field, select either **from** or **to**, to choose how new messages will be moved.

- In the second field, select the name of the sender that you want to apply the rule to.
- In the third field, select the folder where selected messages should be sent.

Using the Rules Wizard

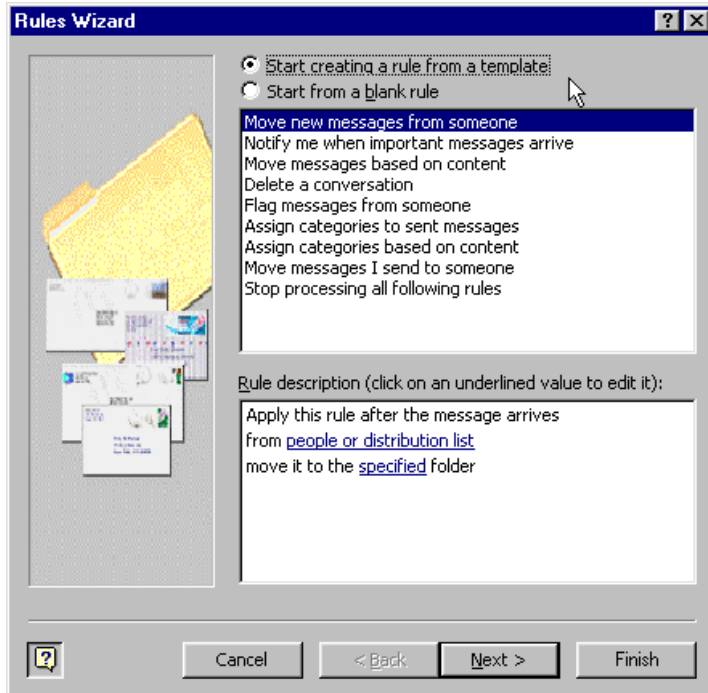
To create rules with the Rules Wizard:

- From the main menu, choose **Tools > Rules Wizard** to open the **Rules Wizard** dialog box:



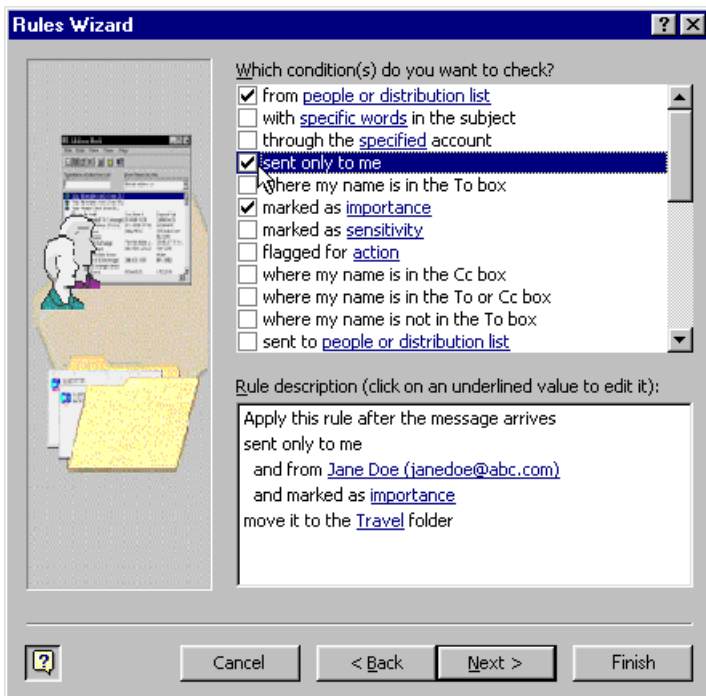
- Click on **New** to open the next **Rules Wizard** dialog box, where a new rule can be created:

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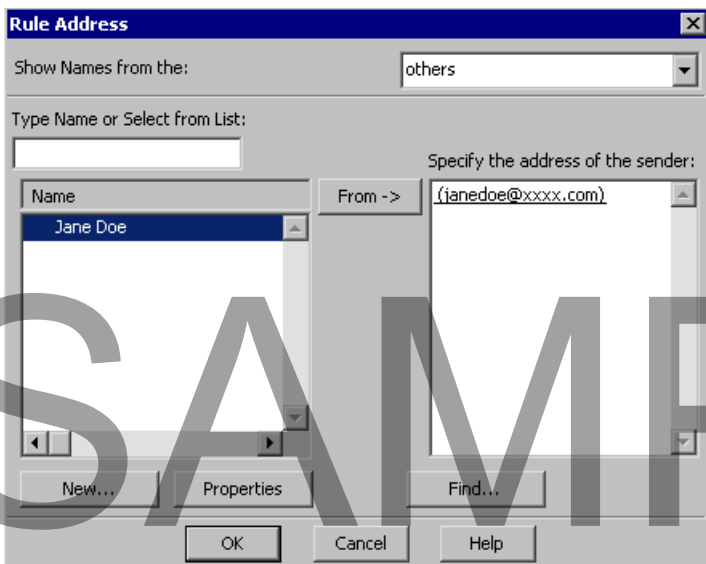


- Select the type of rule to be created from the top field. A description of the rule will show in the bottom field.
- The values that are underlined and in blue need to be set by clicking on each one and making the appropriate selection.
- Once finished, click the **Next >** button to open the next window. You'll be asked to select your choice of conditions that apply to the new rule:

SAMPLE

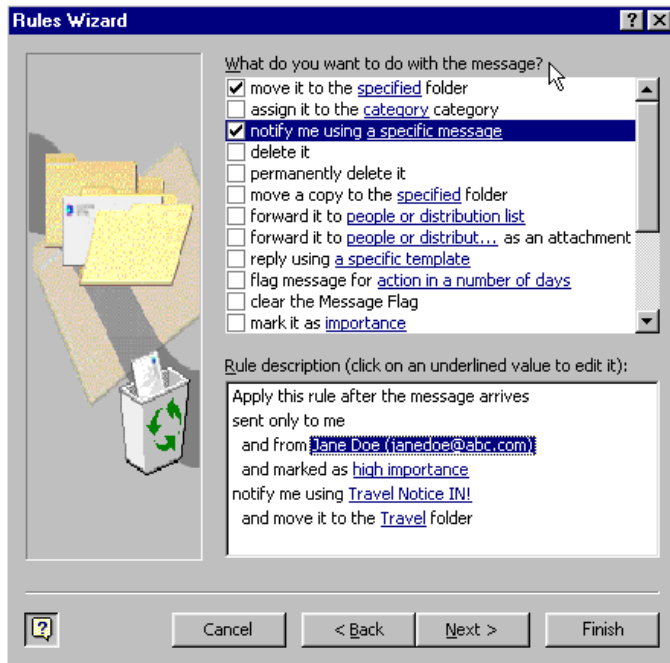


- After checking the conditions for the rule in the top box, click on the first underlined words in the bottom description box. This will open a dialog box showing the contacts list:



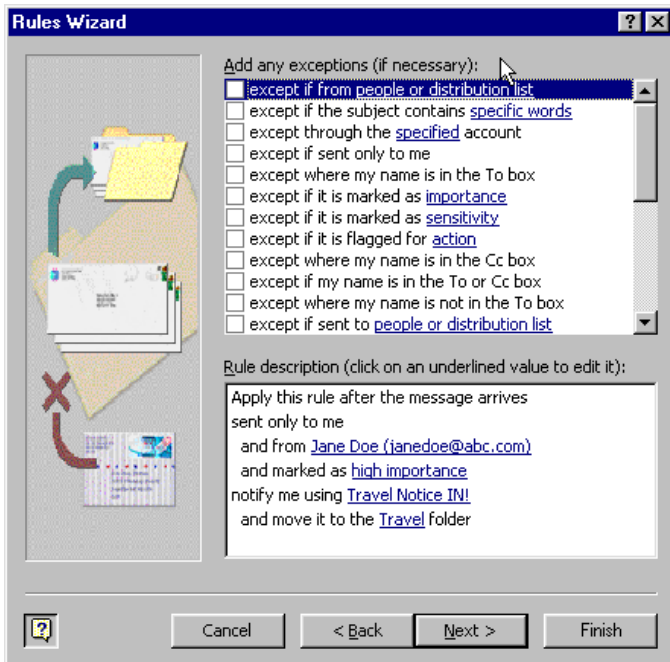
- Select a name, and click the **From** button to add it to the list field on the right. One or multiple names can be applied to a single rule.
- Once all required names are selected, click **OK**.
- Select the second underlined word in the lower field of the Wizard dialog box, and Outlook will open the required list. If this is for the destination folder, select the folder where you want the email placed.

- Once the folder is selected, click **OK**.
- Once all underlined words have been filled in as required, click **Next** to open the next **Rules Wizard** dialog box:

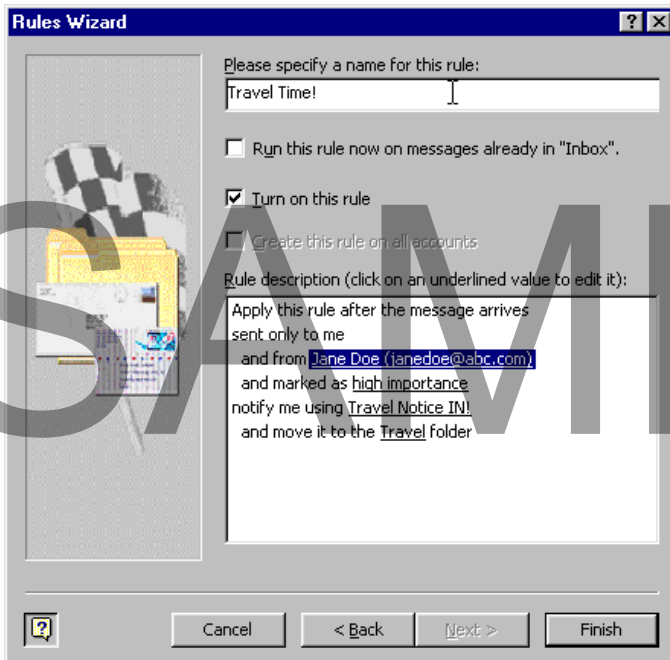


- This page allows you to set what should be done with the message. A variety of choices can be selected. The description at the bottom field in the dialog box will alter as selections are checked.
- Once finished, click **Next** to open the next **Rules Wizard** dialog box:

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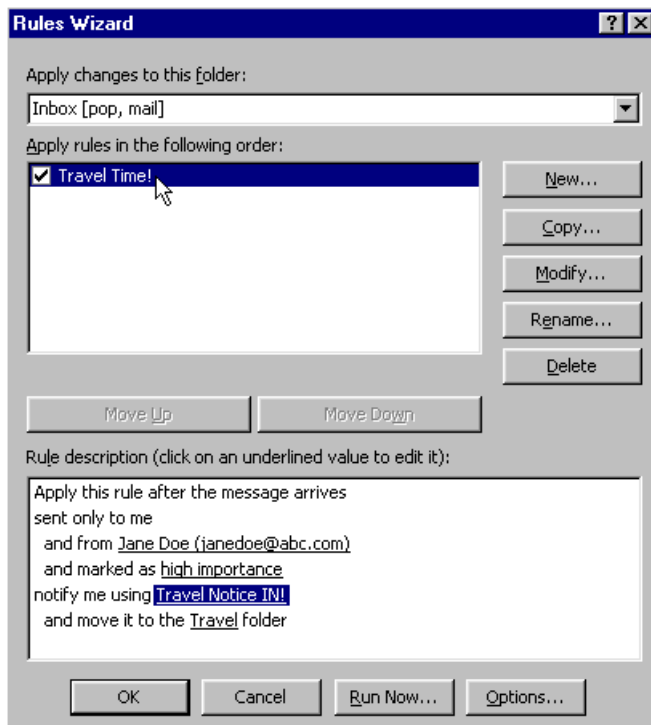


- This opens the area where exceptions to the rule can be selected. You are not obligated to set exceptions. Once selected, the description of the rule will alter in the bottom field.
- If an exception has been set, select it within the bottom field, and set the necessary details about the exception.
- Once finished, click **Next** to open the last **Rules Wizard** dialog box:



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- Provide a name for the rule within the **Please specify a name for this rule** field.
- Selecting the **Run this rule now on messages already in “Inbox”** checkbox will apply the rule to any past messages in the Inbox.
- Selecting the **Turn on this rule** checkbox will apply the new rule to any new messages.
- If available, selecting the **Create this rule on all accounts** checkbox applies the rule to all available email accounts.
- Click **Finish**, and the original **Wizard** dialog box will open, showing the name and completed description of the rule:



- By selecting the checkbox beside the rule name in the **Apply rules in the following order** field, the rule will be applied. If not selected, the rule will not be applied to any messages.

To modify a rule:

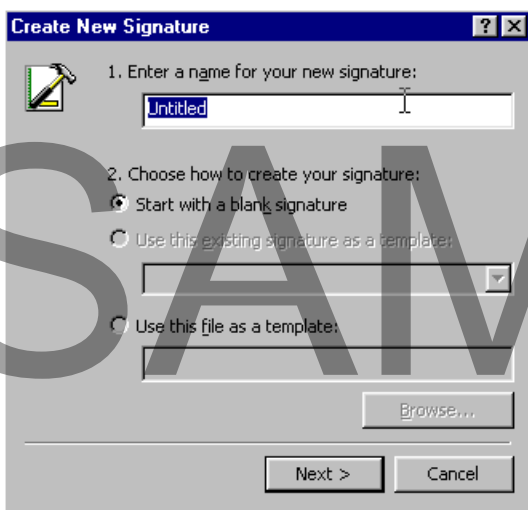
- From the main menu, choose **Tools > Rules Wizard** to open the **Rules Wizard** dialog box.
- Select the rule you want to modify, and click the **Modify** button.
- Make any required changes and click **Next** to move to other rules within the rule set.
- Click **Finish** once the rule has been modified.

Adding a Signature to a Message

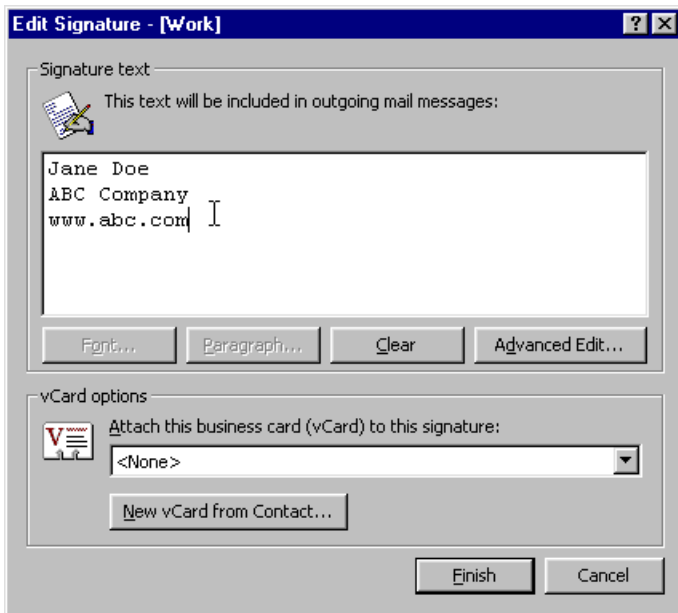
- From the main menu, choose **Tools > Options** to open the **Options** dialog box.
- Select the **Mail Format** tab.
- Select the **Signatures** button at the bottom of the tab to open the **Create Signature** dialog box:



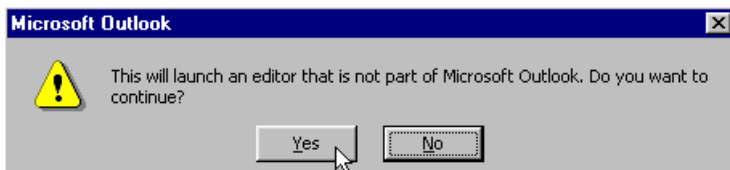
- Click the **New** button to open the **Create New Signature** dialog box, and follow the steps to create a personal signature:



- Enter a name for the signature within the first field.
- Select the **Next** button.
- In the next step, enter the desired signature. (You can include your name, title, company name, et cetera.):



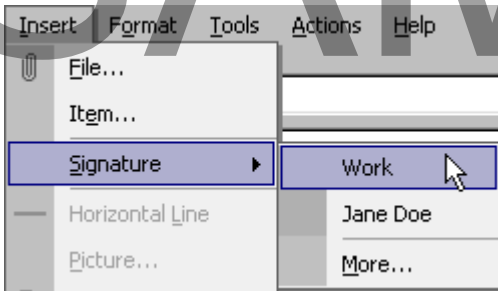
- Selecting **Advanced Edit** will open a warning dialog box:



- Click **Yes**.
- This will open the text of the signature within a **Work Pad**. Here you can alter the font, size and color of the signature text.
- Multiple signatures can be created and saved, so a different signature can be assigned to different messages.

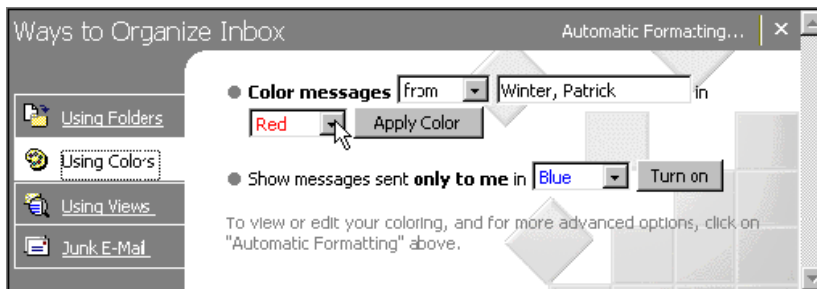
To apply a specific signature to a message being created:

- From the message window's toolbar, select **Insert > Signature** and select the desired signature:

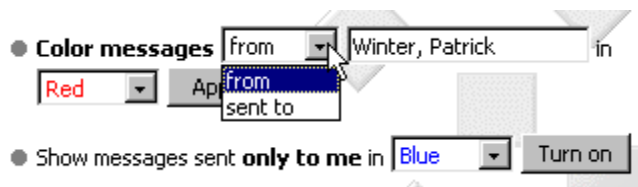


Organizing Messages with Color

- From the main menu, choose **Tools > Organize** to open the **Ways to Organize Inbox** pane within the Inbox information area of Outlook.
- On the left side of the **Organize** pane, select **Using Colors** to view the **Color** pane:



- The default setting in the first field is **from**. To have message headers colored on sent messages, select **sent to** from the drop-down menu:



- In the second field, enter the person's name whose emails will be colored.
- Select a color from the color drop-down menu:



- Selecting **Apply Color** will allow the selected color to be applied to any past messages from and to the selected person in the Inbox and Sent Items folders.

Checking the Spelling and Grammar

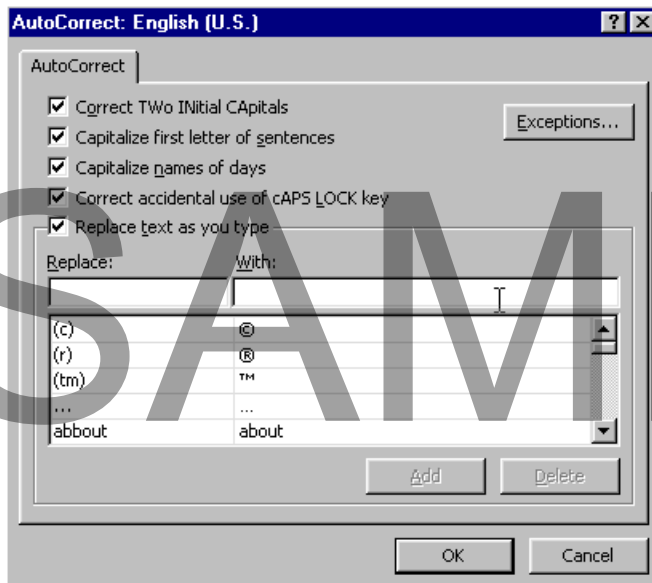
To set Spelling and Grammar checks:

- From the main menu, choose **Tools > Options** to open the **Options** dialog box.

- Select the **Spelling** tab:

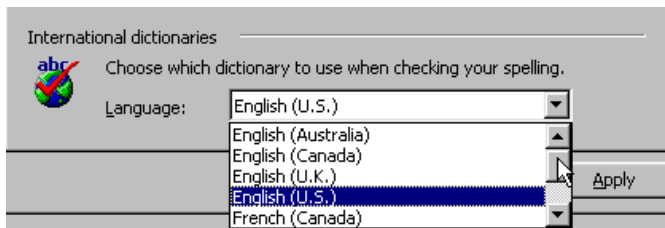


- **General Spelling Options** - These options enable you to set how the spelling and grammar check should behave. The **AutoCorrect Options** button opens the **AutoCorrect** dialog box (the same as in Word):



- **Edit Custom Dictionary** - Selecting **Edit** in this section will open a Notepad window listing words within the custom dictionary. Words can be added, removed and edited from this list.

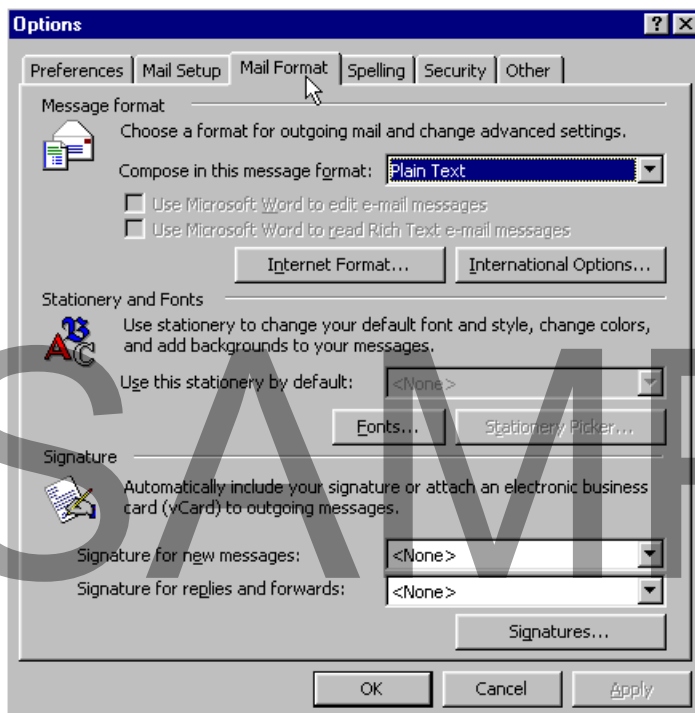
- **International dictionaries** - By using the **Language** drop-down menu, various international dictionaries can be selected for accurate spell checking. The languages displayed are those that were selected when Office was installed:



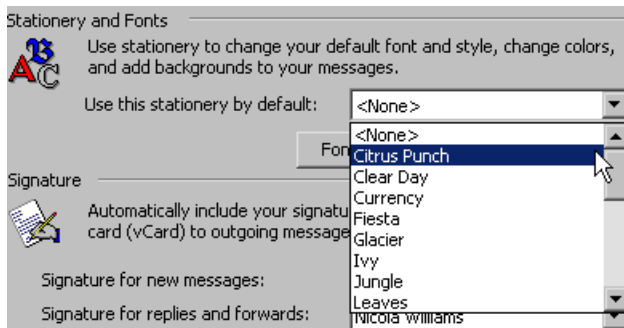
Mail Customization

Using Message Stationery

- **Stationery settings** can only be used with messages in HTML format, although any font settings made will be used with all messages.
- From the main menu, choose **Tools > Options** to open the **Options** dialog box.
- Select the **Mail Format** tab:



- The **Use This Stationery** drop-down menu allows you to choose a specific stationery to use. The default is set at **None**:

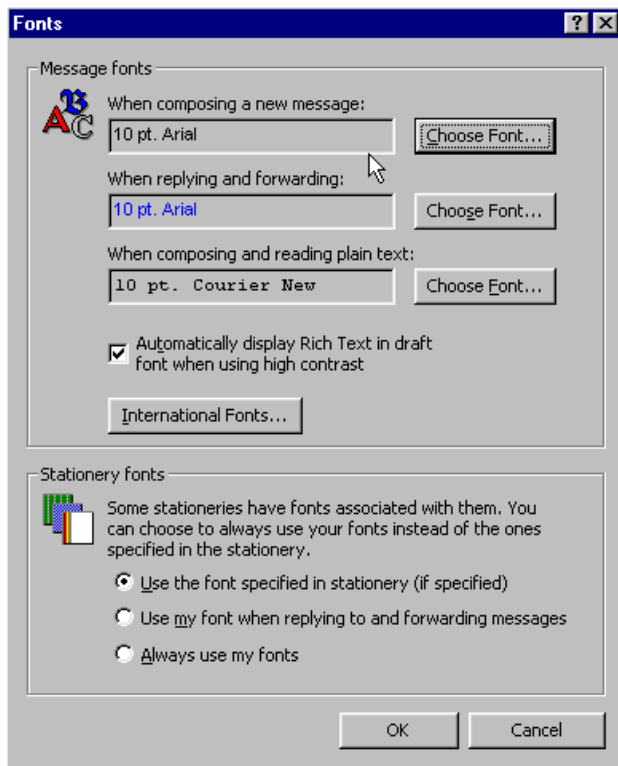


- The **Stationery Picker** button will open the **Stationery Picker** dialog box, where a list of stationeries can be selected from, and viewed in the bottom portion of the dialog box. Here it is possible to select **Edit**, **Remove** or **New** to manipulate the stationeries:

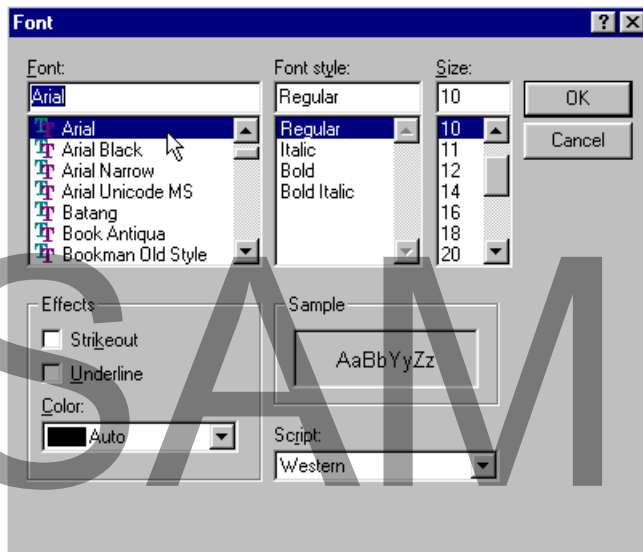


- If there is no appropriate stationery, select **Get More Stationery** and the web browser will open a Microsoft Web page where there are alternate stationery to choose from.
- When selected, the **Fonts** button will open the **Fonts** dialog box, where fonts can be selected for three separate areas, **When composing a new message**, **When replying and forwarding** and **When composing and reading plain text**:

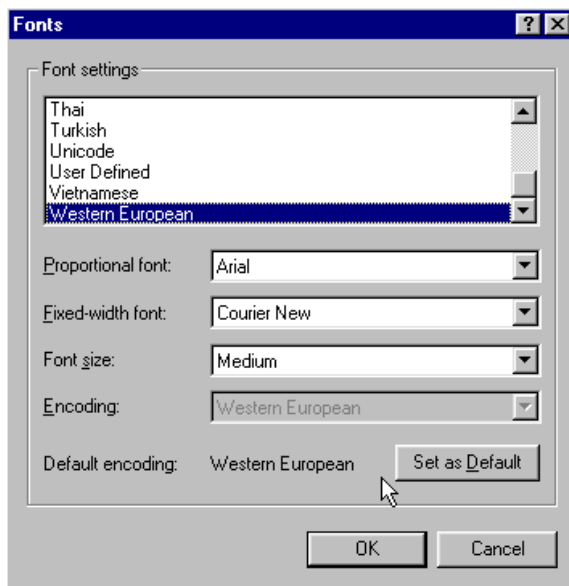
SAMPLE



- By clicking on a **Choose Font** button, you can select the font, font style, font size, font effects and font color for specific areas of text:



- By having the **Automatically display Rich Text in draft font when using high contrast** checkbox selected, you can make messages easier to read on smaller monitors. Though the default setting is to have this checkbox selected, it can be deselected.
- Selecting the **International Fonts** button will open the **International Fonts** dialog box, where a default font can be set to a selected language:



Customizing Stationery

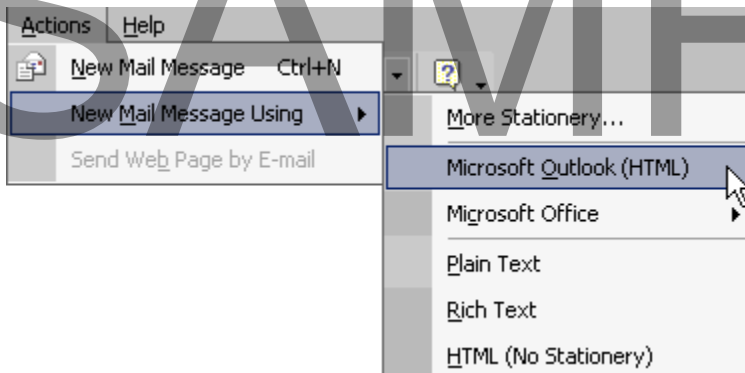
To create new stationery:

- From the main menu, choose **Tools > Options** to open the **Options** dialog box.
- Select the **Mail Format** tab.
- If available, click on the **Stationery Picker** button.
- Click on the **New** button.

Modifying Message Formats

To alter the format for a message about to be created:

- From the main menu, choose **Actions > New Mail Message Using** and select a new **Format** from the list provided:



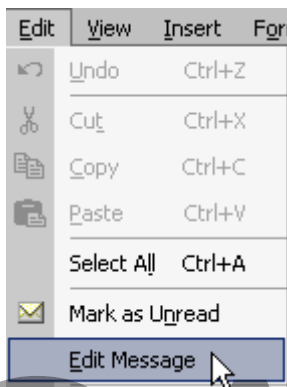
- **More Stationery** - Will show a list of stationeries to select for this specific email.
- **Microsoft Word (HTML)** - Will create the message using the HTML format that can be used with stationery.
- **Microsoft Office** - Will create the message either as an **Access** data page, **Excel** spreadsheet, or a **Word** document. This allows you to open any of the applications to create the document within Outlook.
- **Plain Text** - Will create the message in the **Plain Text** format.
- **Rich Text** - Will create the message in the **Rich Text** format.
- **HTML (No Stationery)** - Will create the message using the HTML format without stationery.

To alter the format for a message already sent:

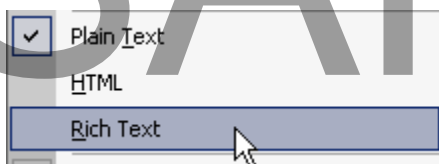
- Open a message from the Sent Items box.

NOTE: The sent message has to already be in a rich text or a Plain text format prior to editing for the menu selection to present all three formats.

- In the menu bar of the Sent message, choose **Edit > Edit Message:**



- Choose **Format** and select from **Plain Text**, **HTML** or **Rich Text** to alter the message's format:



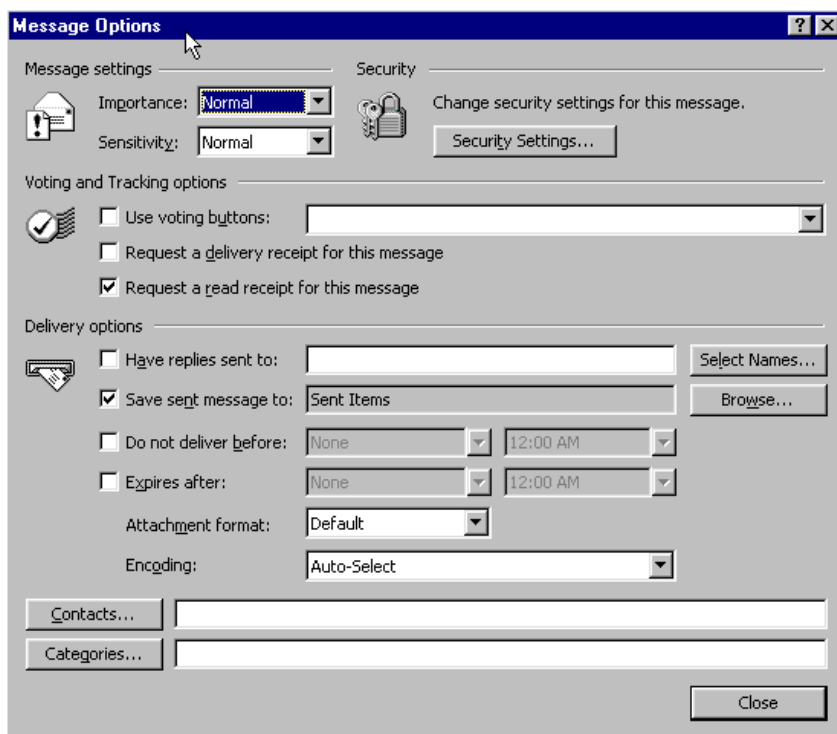
Modifying the Settings

- The best method to alter any setting is through the **Options** dialog box.
- From the main menu, choose **Tools > Options** to open the **Options** dialog box.

- Select from the **Preferences, Mail Setup, Mail Format, Spelling, Security** and **Other** tabs to locate which settings need to be altered, and alter as required.

Modifying Delivery Options

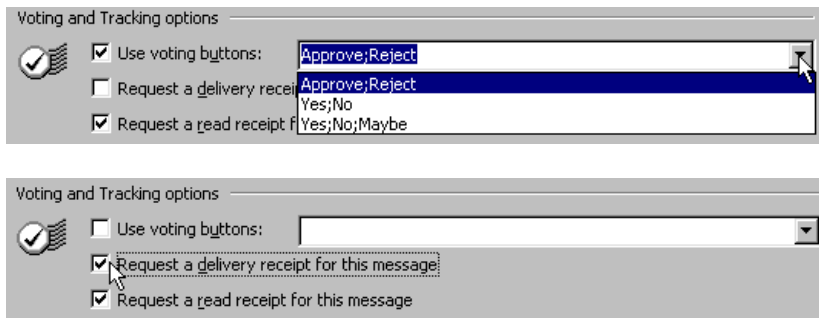
- The delivery options of a message can be altered while creating the message.
- From the message's menu bar, choose **View > Options** to open the **Message Options** dialog box:



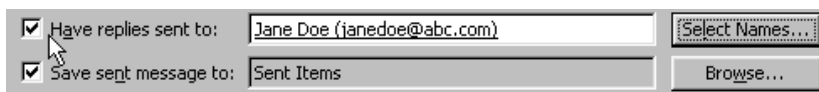
- The **Message Settings** area allows you to set the **Importance** and **Sensitivity** options for the message:



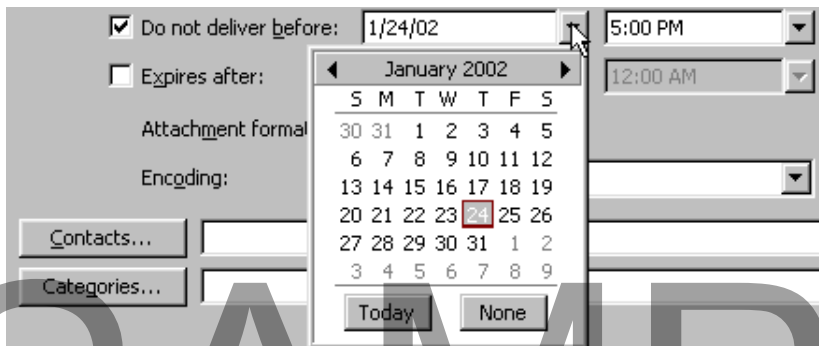
- The **Voting and Tracking options** area allows some more interesting selections. The **Use voting buttons** option allows you to create a message that contains a question that recipients can vote on.
- There are three predefined sets of voting buttons, **Approve; Reject, Yes; No**, and **Yes; No; Maybe**. New voting buttons can also be defined. The Tracking options enables you to request a **Read Receipt** and/or a **Delivery Receipt** of the message being sent:



- The **Delivery options** area allows a multiple of options.
- The **Have message placed in** field directs which folder the sent message should be placed.
- The **Have replies sent to** field selects the recipient of the reply – yourself, or another person within the **Contact** list:



- The **Do not deliver before** fields allow you to set a message for a timed delivery, using a drop-down calendar menu and a drop-down hourly menu:



- The **Expires after** field sets the expiry for a message after a certain date if not viewed, thus removing itself from the recipients' email. If the message is viewed, then the expiry option will cease to be effective.

Opening and Replying

Opening and Reading a Message

- When new messages arrive, the header of the message will appear in bold within the **Inbox Information** pane.

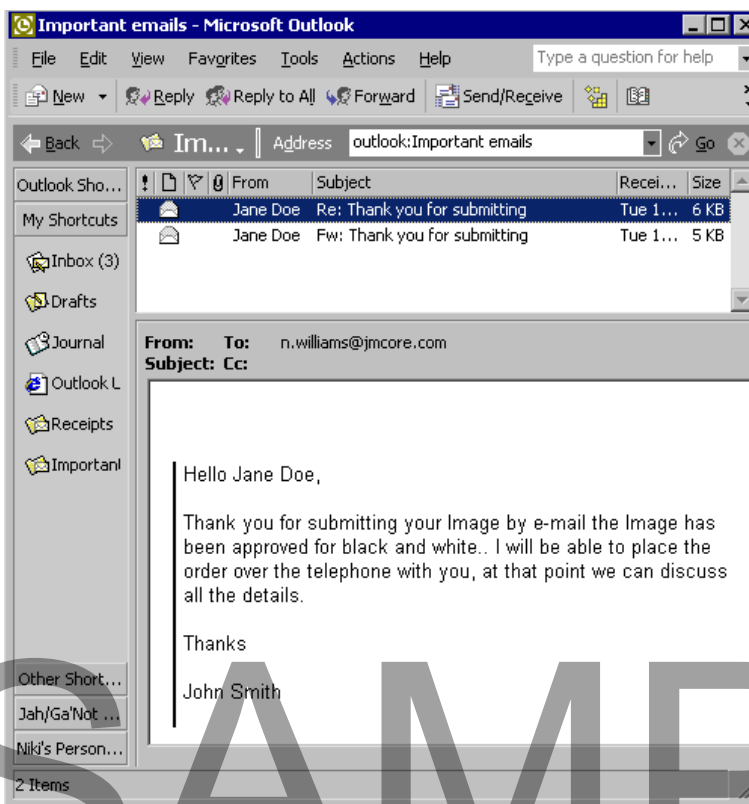
- If the **Folders List** is open, the number of new messages appears beside the **Inbox** folder.
- One way to read a message is to double-click on the header line in the **Inbox Information** pane, and the message box will open.

OR read the message through the **Preview** pane.

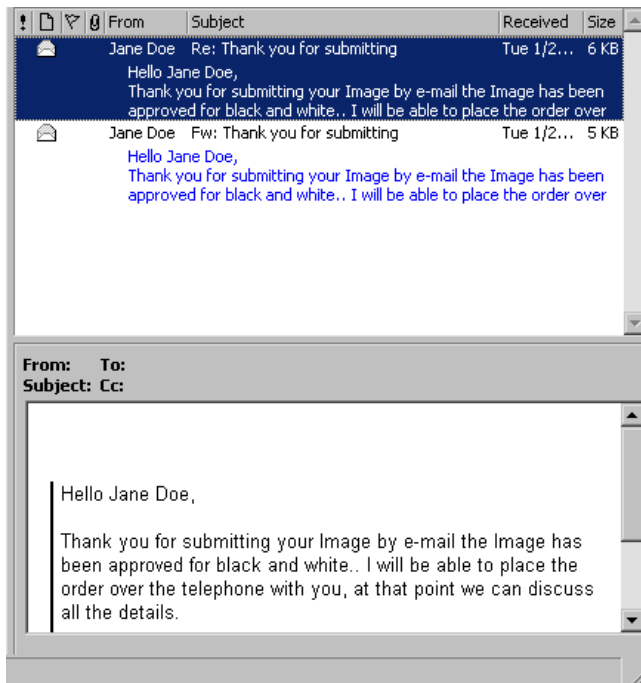
To open the Preview pane:

- From the main menu, choose **View > Preview** to have the **Preview** pane open underneath the **Inbox Information** pane.

The message appears in full, and can be scrolled through for reading without opening the message:



- For a faster, very brief look at a message, from the main menu choose **View > AutoPreview**.
- The **Inbox Information** pane will preview the first three lines of the message under the message header:



Opening an Attachment

- If there is an attachment to the message, it is shown in three ways:
- A paperclip icon will appear by the header name in the **Inbox Information** pane:



- If the **Preview** pane is open, the attachments' names will show at the top of the pane:



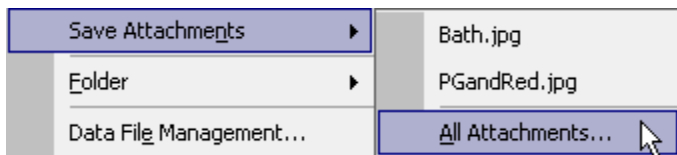
- Once the message is open, the name of the attachment is listed in the **Attachment** field at the top of the message:



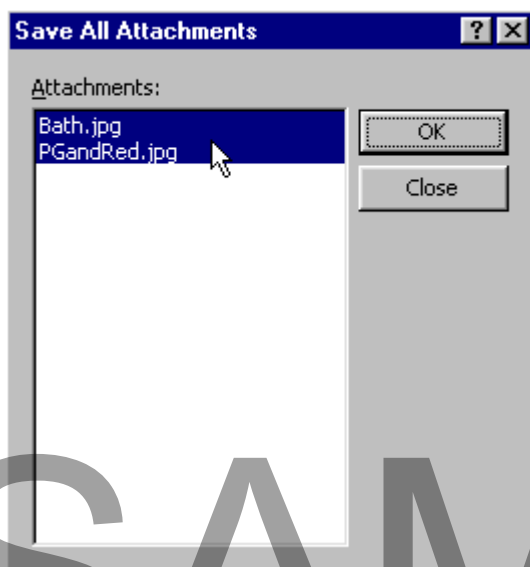
- To open the attachment, double-click on the name either in the **Preview** pane, or within the open message.

Saving an Attachment

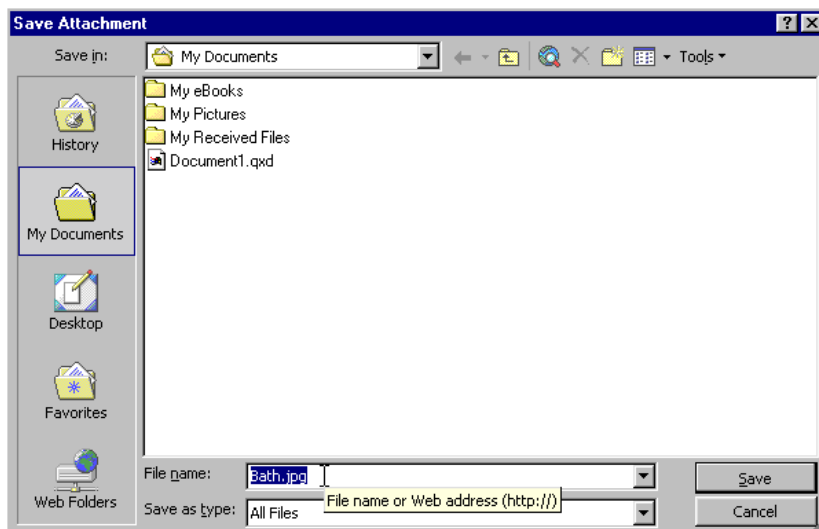
- To save attachments, first select the message in the **Inbox** Information pane to highlight the message header.
- From the main menu, choose **File > Save Attachments**.
- If there are multiple attachments and only one needs to be saved, simply select the name of the file to save. To save all attachments with the message, select **All Attachments**:



- If the **All Attachments** option is selected, the **Save All Attachments** dialog box will open, listing the attachments to be saved. If at this point it is decided that an attachment does not need to be saved, simply click on the file to deselect it:

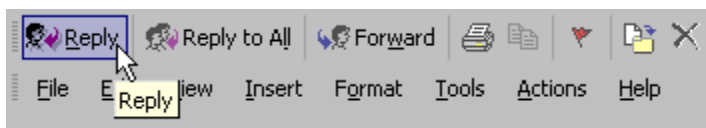


- If only one attachment is saved, or if **OK** is clicked in the **Save All Attachments** dialog box, the **Save Attachment** dialog box will open. Locate the appropriate file where the attachment will be saved from the **Save In** drop-down menu. Rename the attachment, if necessary, in the **File name** field:



Replying to a Message

- Double-click on a message header in the **Inbox Information** pane to open a message.
- Click on the **Reply** button in the top message box menu:



- This will open a reply message, with the sender from the original message in the **To** field.
- The **message** can be altered (even the original message) to create a smaller message to send, or for editing purposes.
- If a message was sent to multiple people, the **Reply to All** button allows you to send a reply not only to the original sender, but to all other addresses included in the original message as well:



Forwarding a Message

- Messages can also be **forwarded** to a separate contact.
- Once a message is open, click on the **Forward** button in the message's menu bar:

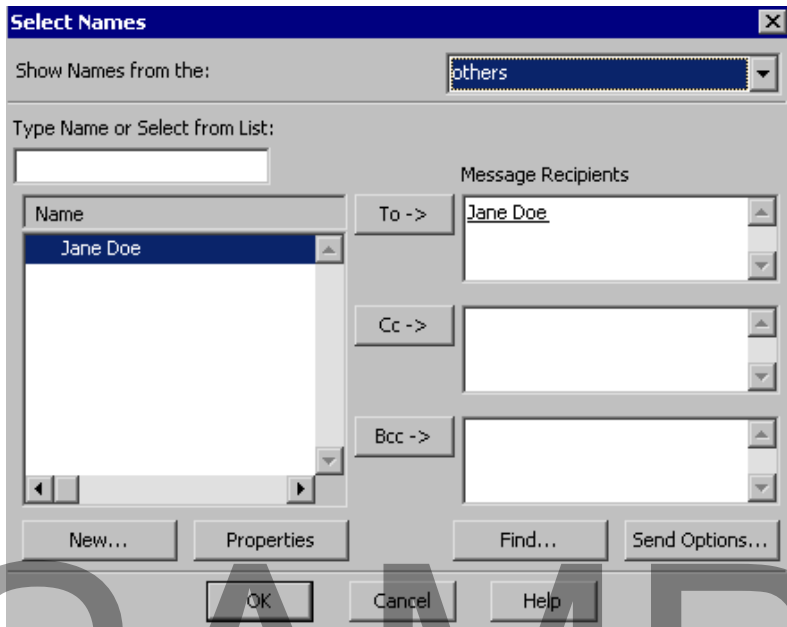


- This will create a new message box, with the original email contained in the body text. New text can be added above the original text, and the new recipient entered within the **To** field.

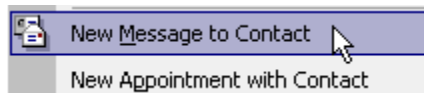
Selecting a Message Recipient

To enter an email address to send a message with different methods:

- If a new message has been created, type the email address directly into the **To** field.
- Select the **To** button to open the **Select Names** dialog box:



- Select the desired recipient name from the left **Name** column, and click the **To ->** button to add the name to the **Message Recipients** column on the right.
- **Contacts** can also be placed in the **CC** section, as well as the **BCC** section. By placing a recipient in the **BCC** section, their email address will not be visible to any other recipients.
- In the Outlook bar, select the **Contacts** icon to open the contacts pane.
- Right-click on the desired contact, and select **New Message to Contact** from the pop-up menu:

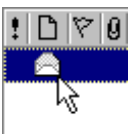


Marking Messages Unread

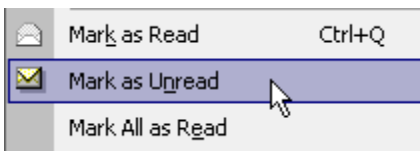
- Any new message that appears has an icon of a closed envelope beside it before it is read:



- Once the message is selected, or previewed, the icon changes to an open envelope to show that it has been read:

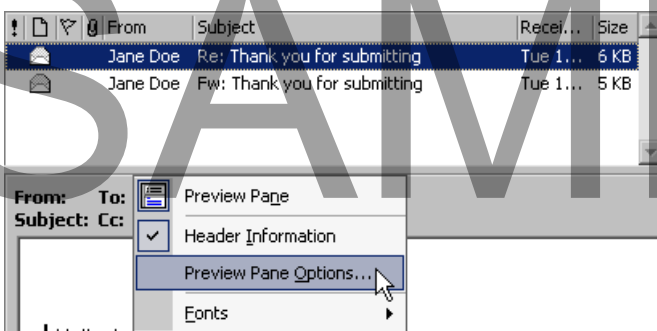


- If a message has been read, but needs to be marked as unread, choose **Edit > Mark as Unread** from the main menu:



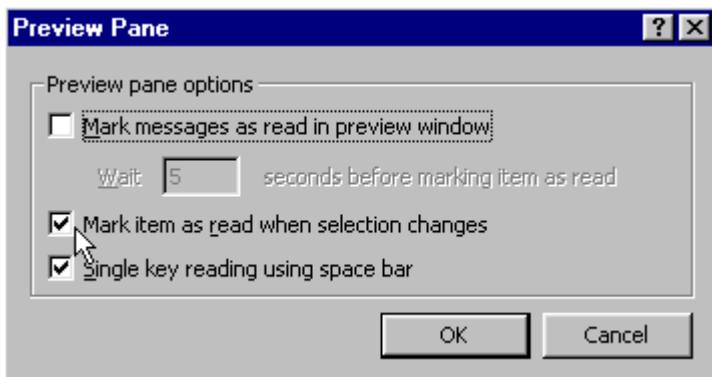
Using the Preview pane Options – Marking Messages Read

- The **Preview** window has settings that allow you to set how messages are automatically marked. Move the cursor to the top of the **Preview** pane until the cursor arrow appears, and right-click:

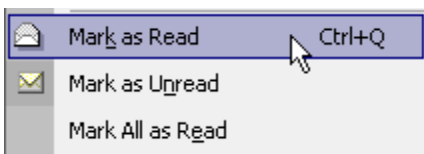


- Selecting **Preview Pane** from this pop-up menu will close the **Preview** window.
- Selecting **Header Information** will reveal the message header information in the **Preview** pane.

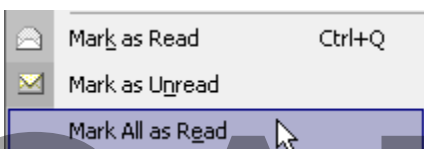
- Selecting **Preview Pane Options** will open the **Preview Pane** dialog box:



- If the **Mark item as read when selection changes** checkbox is not selected, then you will need to make use of the **Mark as Read** and **Mark All as Read** commands.
- If the message has the unread icon, and needs to be marked as read, from the main menu, choose **Edit > Mark as Read**:



- If there is a selection of messages that are connected, and all need to be marked as **Read**, from the main menu, choose **Edit > Mark All as Read**:



Recalling a Message

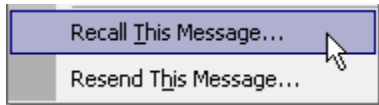
To be able to recall a message from being delivered, four conditions must be present:

- The recipient of the email must also have Outlook open.
- The recipient must be logged onto Exchange.
- The email cannot have been opened yet.
- The message cannot have been moved from the delivery folder to another folder.

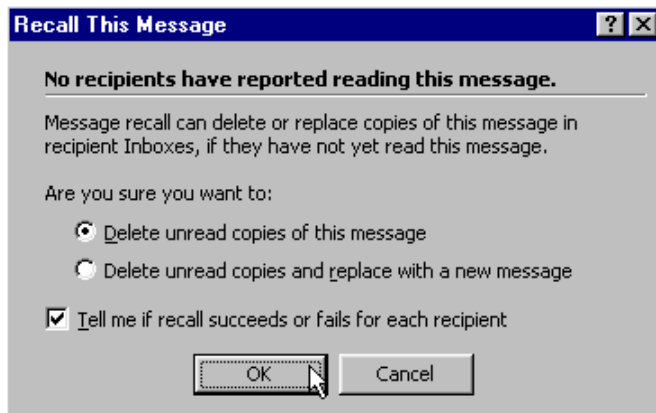
To recall a message:

- Open the **Sent Items** folder from either the **My Shortcuts** area on the Outlook bar or from within the **Folder List**, if displayed.

- Double-click on the message to be recalled, opening it.
- From the message's menu bar, choose **Actions > Recall This Message:**



- This will open the **Recall This Message** dialog box:

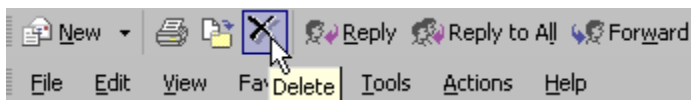


- Note that even though it may indicate that the recipient has not read the message; this is an untrue statement as a Read Receipt was not requested.
- It is very important that a **Read Receipt** is requested with any messages that might have a chance of being recalled, as without the **Read Receipt**, Outlook has no way of really knowing the status of the message.
- If **Delete unread copies of this message** is selected, the message will simply be deleted.
- If **Delete unread copies and replace with a new message** is selected, the original message will open and can be edited. Clicking Send in the Message's menu will resend the edited message.
- Always have the **Tell me if recall succeeds or fails** checkbox selected, as this will inform you immediately with a separate message on the status of the recall.

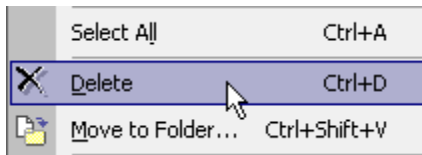
Deleting a Message

To delete a message:

- Select the header of the message.
- From the main menu, click on the **Delete** icon, and the message will be moved to the **Deleted Items** folder:



OR with the message to be removed selected, from the main menu, choose **Edit > Delete** and the message will be moved to the **Deleted Items** folder:



Review Questions

How would you:

- Create Messages?
- Set Message Formats?
- Attach Files to a Message?
- Use Rules?
- Use the Rules Wizard?
- Add a Signature to a Message?
- Organize Messages with Color?
- Check Spelling and Grammar?
- Use Message Stationery?
- Customize Stationery?
- Modify Message Formats?
- Modify Settings?
- Modify Delivery Options?
- Open and Read a Message?
- Open an Attachment?
- Save an Attachment?
- Reply to Messages?
- Forward Messages?
- Select Message Recipients?
- Mark Messages as Unread?
- Use the Preview Pane Options?
- Mark Messages as Read?
- Mark all Messages as Read?
- Recall a Message?
- Delete a Message?

Outlook 2002 Interface

When you have completed this learning module you will have seen how to:

- Use the Main Menu
- Use the Standard Toolbar
- Use the Advanced Toolbar
- Use Outlook Shortcuts
- Use My Shortcuts
- Use Other Shortcuts
- Use the Office Assistant
- Customize Outlook Today
- Customize a Toolbar
- Create a New Toolbar
- Create a Custom View
- Add Time Zones

Outlook 2002 Workspace

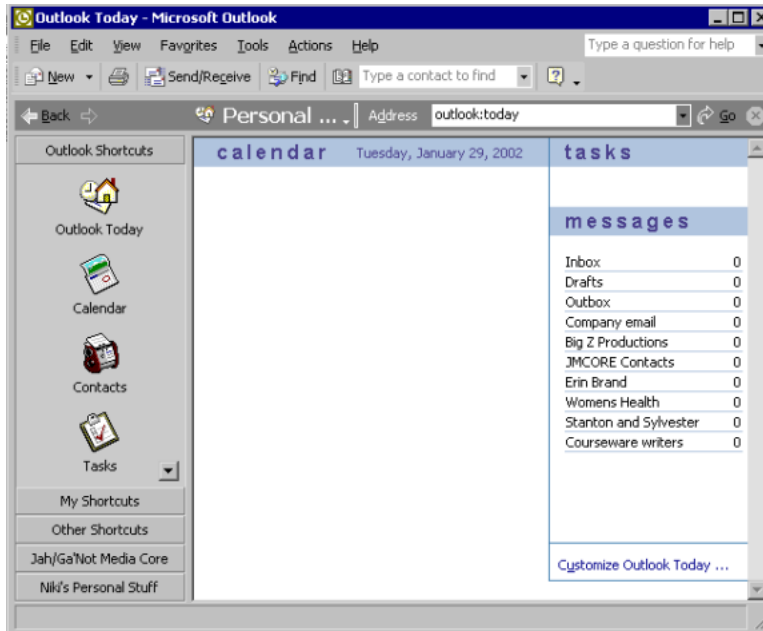
Using the Main Menu

- The **Main Menu** bar holds the various options and commands used within **Outlook 2002**:

File
Edit
View
Favorites
Tools
Actions
Help

SAMPLE

- It also includes an **Ask a Question** field where questions can be typed directly.



Using the Standard Toolbar

- The Standard Toolbar holds a variety of shortcut icons of actions found in the Main Menu:

New (anything)

Print

Move to Folder

Delete

Reply

Reply to All

Forward

Send/Receive

Find, Organize

Address Book,
the Find a Contact field

Help

Toolbar

Options (where the toolbar can be customized with alternate icons). Back

Forward

the Web Search feature

Go

Stop

Refresh

- When Outlook is launched, the default setting has the **Standard Toolbar** sitting below the **Main Menu** bar.

- To move the toolbar, place the cursor over a partition in the toolbar until the arrow appears, click and drag to have the menu bar and toolbar alter positions.

Using the Advanced Toolbar

- From the main menu, choose **View > Advanced Toolbar** to open the **Advanced Toolbar** under the main menu.
- The Advanced Toolbar holds more icon shortcuts to actions located in the main menu:

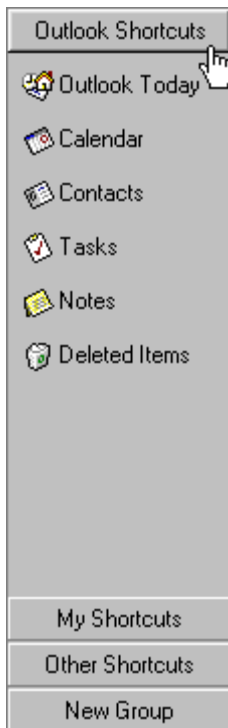
Outlook Today
Back
Forward
Up One Level
Folder List
Preview Pane
Print Preview
Undo
Rules Wizard
the Current View field
Group By Box
Field Chooser
Auto Preview
Toolbar Options

- The advanced toolbar can be customized with alternate icons.

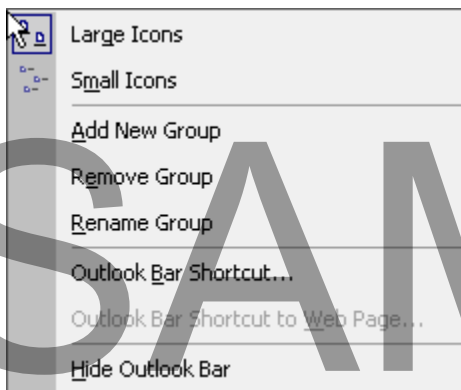
Using Outlook Shortcuts

- From the main menu, choose **View > Outlook Bar** to open the **Outlook Bar** with all shortcuts at the far left of Outlook's workspace:

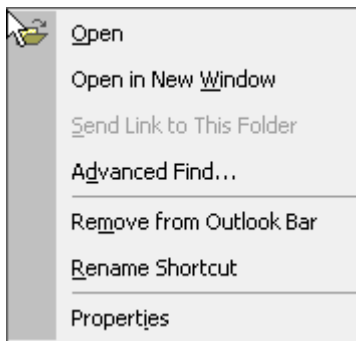
SAMPLE



- The Outlook Shortcuts area holds the Outlook Today, Calendar, Contacts, Tasks, Notes and Deleted Items icons.
- New shortcuts can be created by selecting and dragging a folder from the **Folder List** onto the Outlook Bar.
- By placing the cursor within the Outlook Bar and right-clicking, a pop-up menu will appear:

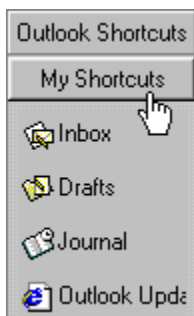


- Here, the icon size can be altered, **Groups** (another word for the Shortcut tabs) can be added, removed or renamed, a new **Outlook bar Shortcut** can be created, and the Outlook Bar can be hidden.
- By right-clicking on top of an icon, the pop-up menu that appears allows you to alter that specific shortcut:

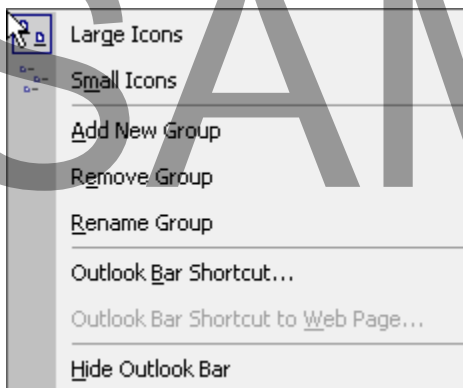


Using My Shortcuts

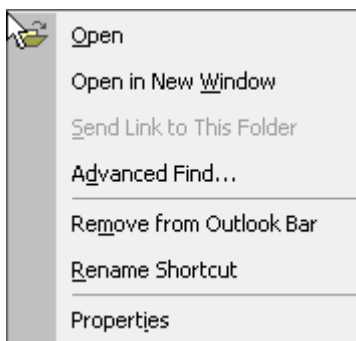
- With the Outlook Bar visible, click on the **My Shortcuts** tab at the bottom of the bar to open the **My Shortcuts** bar and the tab will move to the top of the bar.
- The My Shortcuts area holds the Inbox, Drafts, Journal and Outlook Update icons:



- New shortcuts can be created by dragging folders from the **Folders List** and placing them onto the **My Shortcuts** area.
- By placing the cursor within the **My Shortcuts** bar and right-clicking, a pop-up menu will appear:



- With this menu, the icon size can be altered, **Groups** (another word for the **Shortcut** tabs) can be added, removed or renamed, a new **Outlook bar Shortcut** can be created, and the Outlook bar can be hidden.
- By right-clicking on top of an icon, the pop-up menu that appears allows you to alter that specific shortcut:



Using Other Shortcuts

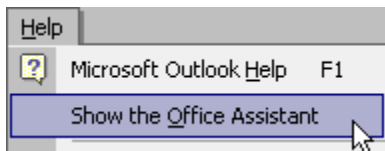
- With the **Outlook Bar** visible, click on the **Other Shortcuts** tab at the bottom of the bar to open the **Other Shortcuts** bar and the tab will move to the top of the bar.
- The Other Shortcuts area holds the My Computer, My Documents and My Favorites icons:



- By placing the cursor within the **Other Shortcuts** bar and right-clicking, the same pop-up menu will appear as in the Other Shortcut bars. Here the **Icons** and **Groups** can be altered.
- By right-clicking on top of an icon, the pop-up menu that appears enables you to alter that specific shortcut.

Using the Office Assistant

- From the main menu, choose **Help > Show Office Assistant:**



- This will open the familiar Microsoft paperclip **Office Assistant** program:

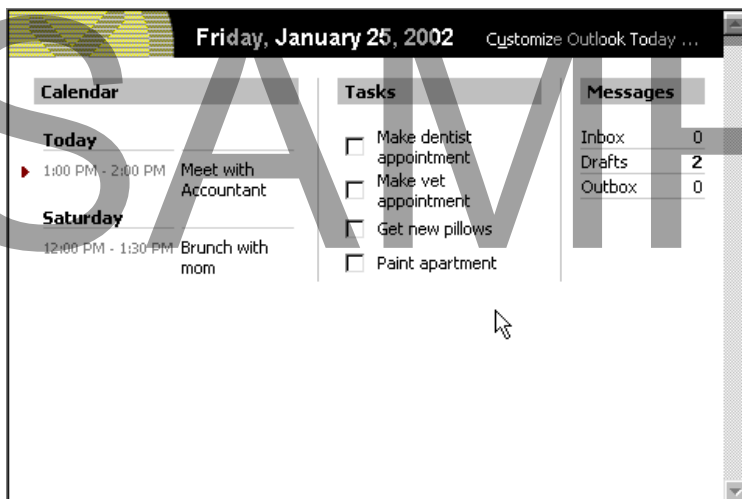


- If opened in any area within Outlook, **the Assistant** will automatically ask a question pertaining to the area, be it **Notes, Journal, Calendar, or the Inbox** Information panel.

Customize Outlook Today

Customizing Outlook Today

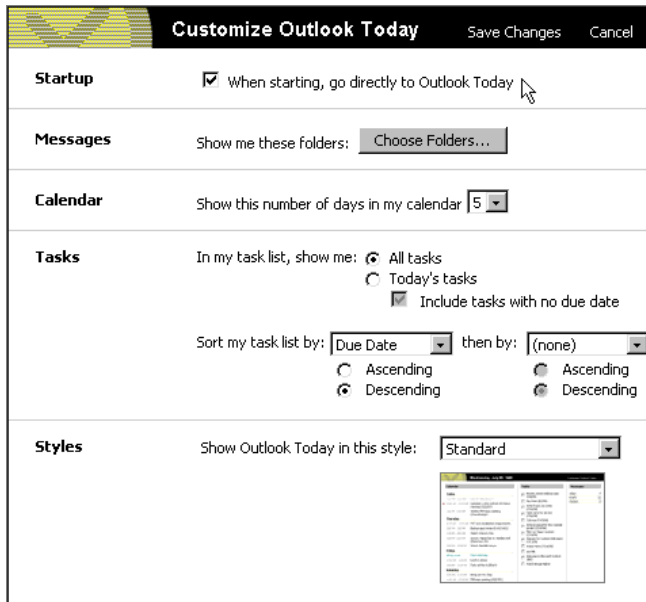
- The **Outlook Today** panel is the first item seen when Outlook is launched, so customize it to show you the items you need to be informed of immediately.
- To open the **Outlook Today** panel, select the **Outlook Today** icon in either the **Outlook** bar, or the **Files List**:



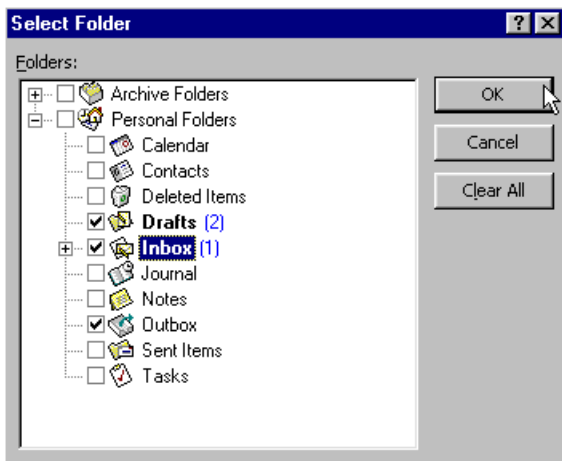
- The default setting of the **Outlook Today** panel will show the **Calendar**, **Tasks**, and current **Message** information.
- To customize the panel, select the **Customize Outlook Today** button:



- This will open the **Customize Outlook Today** panel:



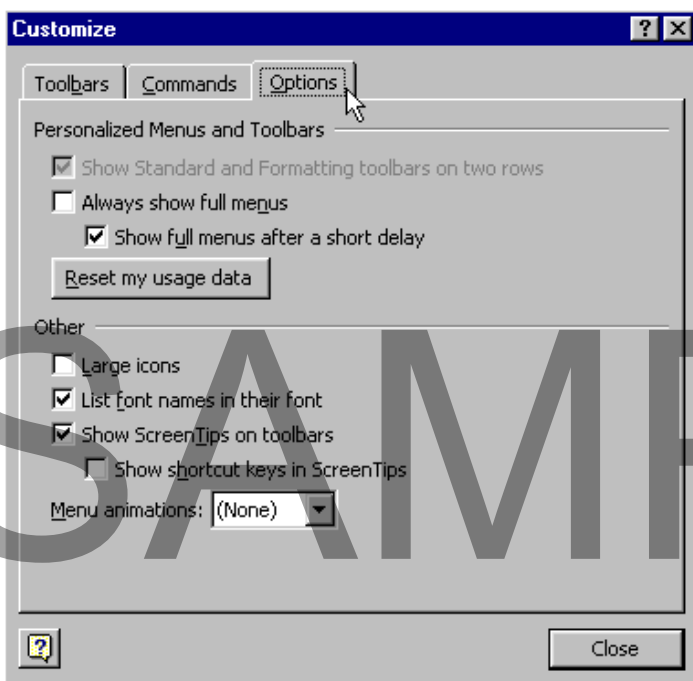
- **Startup** - If unchecked, this will have Outlook start with the Message Information panel showing. If checked, the Outlook Today panel will show.
- **Calendar** - The default setting shows 5 days of calendar items. This can be altered.
- **Tasks** - The default setting shows all tasks, but you can select to have only today's tasks appear. Tasks can also be sorted with the two separate sorting fields.
- **Styles** - The default style setting is **Standard**, which is the three column format. There is also **Standard (two columns)**, **Standard (one column)**, **Summer** and **Winter**. The **Summer** style has a yellow background with two columns, and the **Winter** style has a white background with two columns.
- **Messages** - If there are any other folders besides Inbox that may have unread messages being sent to them, via a rule, selecting the **Choose Folders** button will open the **Select Folder** dialog box, where multiple folders can be selected to show up in the **Outlook Today Messages** area:



- Once all changes are done, select the **Save Changes** button at the top of the panel, or **Cancel** to undo any changes.

Customizing the Toolbar

- From the main menu, choose **Tools > Customize** to open the **Customize** dialog box.
- Select the **Options** tab:

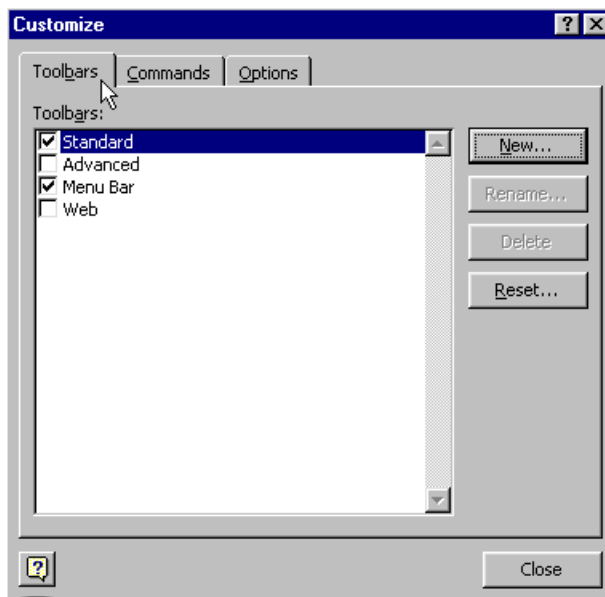


- **Show Standard and formatting toolbars on two rows** - Sets the Standard and Formatting toolbars onto two rows in forms such as a Message.

- **Always show full menus** - When deselected, enables Outlook 2002's adaptive menu option, where only tools that are frequently used appear in the toolbar. Any others are hidden.
- **Reset my usage data** - Clicking this button resets all default menus and toolbars if the **Always show full menus** checkbox is unselected.
- **Large Icons** - Displays large icons within toolbars and menus. If unselected, all icons will remain small. This is useful on small screens.

Creating a new Toolbar

- Begin by having the panel or form to be added to the toolbar visible.
- From the main menu, choose **Tools > Customize** to open the **Customize** dialog box.
- Select the **Toolbars** tab:



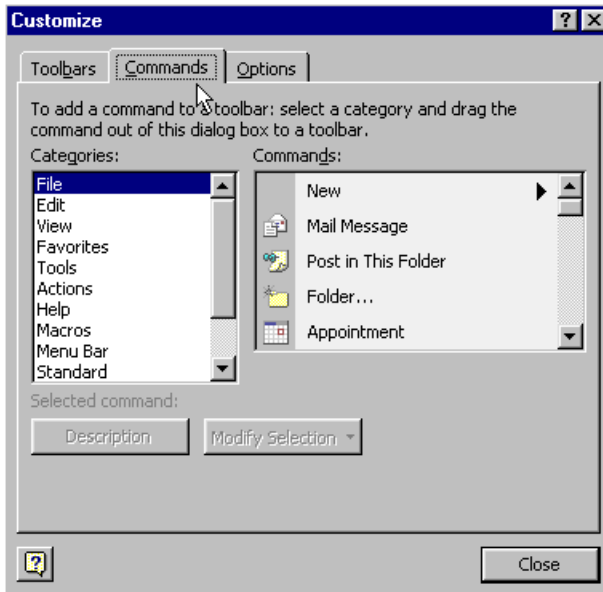
- Click the **New** button to open the **New Toolbar** dialog box:



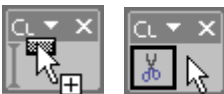
- Enter a new name for the toolbar, and click **OK**.
- The new toolbar will now be listed in the **Customize** dialog box **Toolbars** list, and a prototype toolbar will have been created beside the dialog box:



- Select the **Commands** tab in the **Customize** dialog box:



- Select a category from the **Categories** list on the left for the first tool in the new toolbar.
- Select a command, menu or list from the **Commands** list on the right, and drag it onto the prototype toolbar:

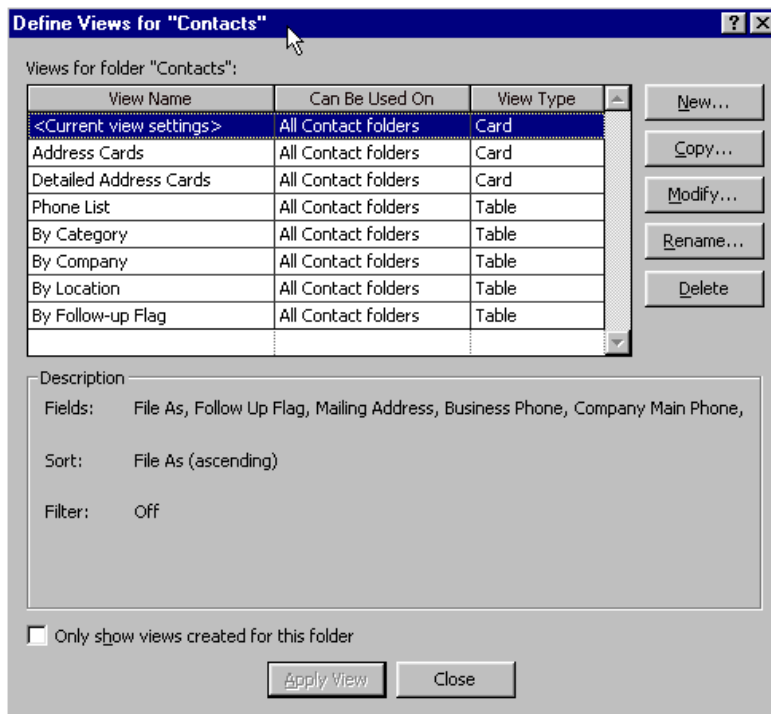


- The icon will appear on the new toolbar. Repeat the above step as many times as required for the needed tools to be on the new toolbar. The width of the toolbar will increase with each addition.
- Once done, click **Close** to close the customize dialog box.
- Click and drag the new toolbar to its new position wherever it is needed. Leaving it in place is called "docking".

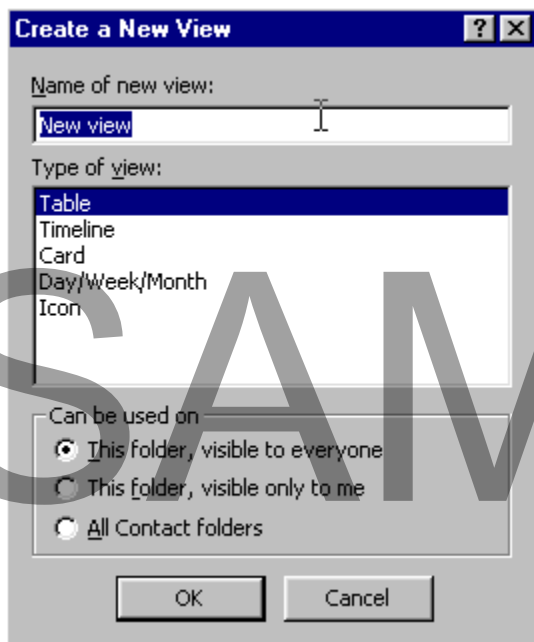
Creating Custom Views

- Begin by revealing a view that displays the items you want in the custom view. For example, the contact list or a message folder.
- From the main menu, choose **View > Current View > Define Views** to open the **Define Views for** dialog box. The opened view will have its name appear at the top of the dialog box. If creating a custom view for the Contacts area,

then the dialog box header should read **Define Views for "Contacts"**:

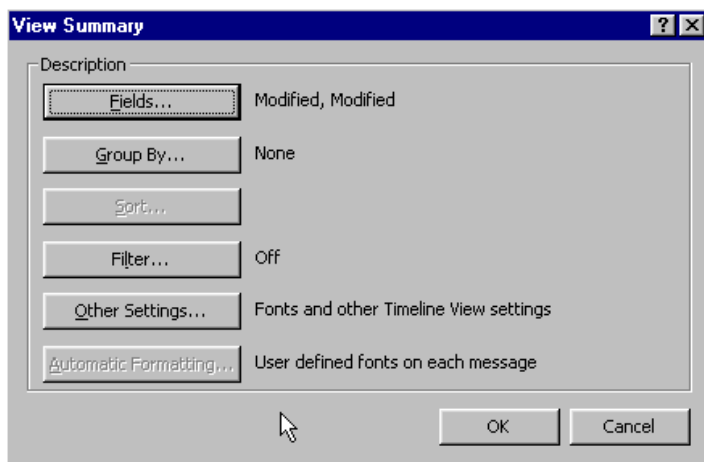


- Click the **New** button to open the **Create a New View** dialog box:



- Enter a new name for the view in the **Name of new view** field.
- Select the type of view to create from the **Type of view** list.

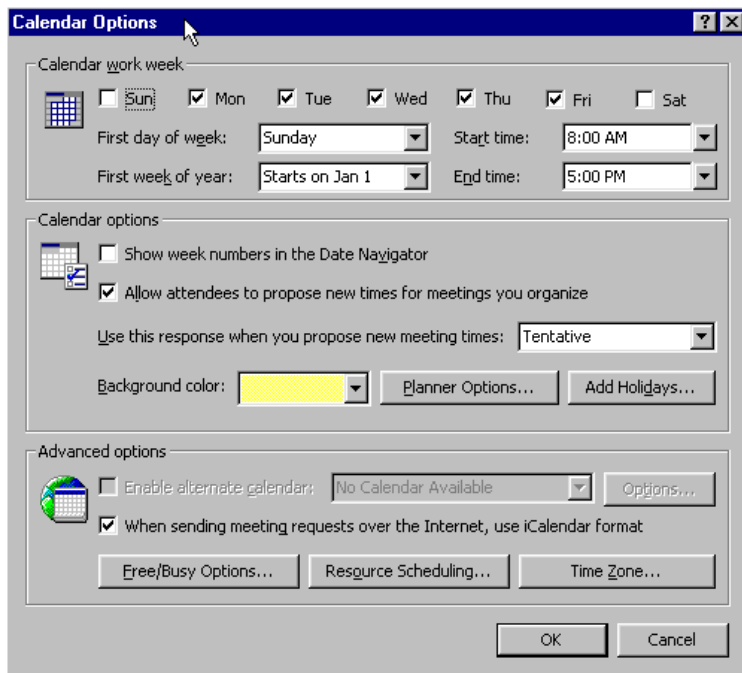
- The Can be used on section allows you to set how the view will be used, this folder, visible to everyone, this folder, visible only to me, or All Contact folders.
- Once done, click **OK** and the **View Summary** dialog box will open:



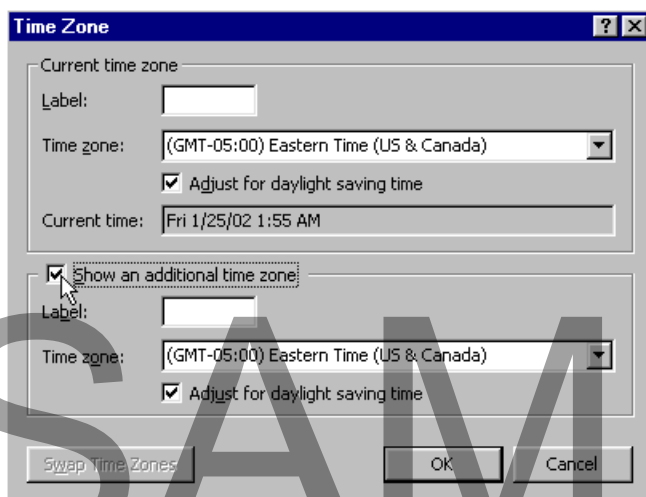
- Various settings can be modified for the view in the **View Summary** dialog box.
- **Fields** - Allows you to select Start and End fields where in time the item is shown. If both fields are the same, then all items are displayed.
- **Group By** - Allows you to group items in any order.
- **Sort** - If available, allows you to sort items.
- **Filter** - Allows you to select certain items to be filtered by conditions in order to be seen within the view.
- **Other Settings** - Sets Fonts and any other available settings.
- **Automatic Formatting** - If available, allows you to automatically set defined fonts for specific messages.

Adding Additional Time Zones

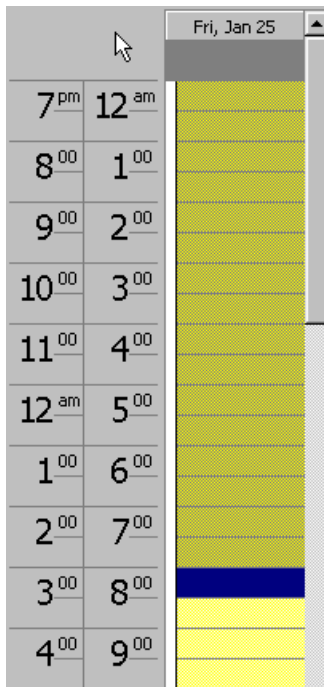
- Open the **Calendar** Information panel, by clicking on the **Calendar** icon in the Outlook Bar, or Folders List.
- From the main menu, choose **Tools > Options** to open the **Options** dialog box.
- In the **Preferences** tab in the **Calendar** section, click the **Calendar Options** button to open the **Calendar Options** dialog box:



- In the **Advanced options** area, click the **Time Zone** button to open the **Time Zone** dialog box:



- Select the **Show an additional time zone** check box to have a second time zone appear beside the main time zone in the **Calendar** pane:



Review Questions

How would you:

- Use the Main Menu?
- Use the Standard Toolbar?
- Use the Advanced Toolbar?
- Use Outlook Shortcuts?
- Use My Shortcuts?
- Use Other Shortcuts?
- Use the Office Assistant?
- Customize Outlook Today?
- Customize a Toolbar?
- Create a New Toolbar?
- Create a Custom View?
- Add Time Zones?

SAMPLE

The Toolbars

When you have completed this learning module you will have seen how to:

- Use the Standard Toolbar
- Use the Outlook Today Toolbar
- Use the Plain Text Message Toolbar
- Use the HTML Message Toolbar
- Use the Rich Text Message Toolbar
- Use the Advanced Toolbar
- Use the Outlook Bar Shortcuts
- Use the Outlook Bar My Shortcuts
- Use the Outlook Bar Other Shortcuts

The Standard Toolbar

Using the New Mail Message Pull-down Menu

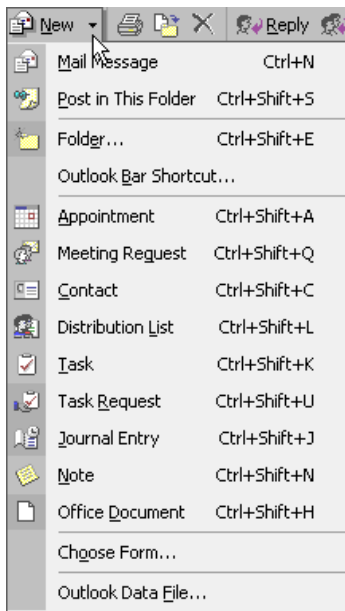
There are two ways that the New menu button can function:

- Place the cursor over the button, and click to create a new message:



- Click on the arrow beside the button to open the drop-down menu:

SAMPLE



- From this menu, any item can be created: Messages, Folders, Outlook Bar Shortcuts, Appointments, Meeting Requests, Contacts, Distribution Lists, Tasks, Task Requests, Journal Entries, Notes and even Word Documents.

Using the Print button

- The **Print** button allows you to print messages, attachments, calendars and tasks – anything that is displayed in the main viewing area:



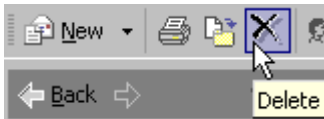
Using the Move to Folder button

- The **Move to Folder** button allows you to instantly move a selected message between various folders:



Using the Delete button

- The **Delete** button easily removes any selected item from a message or task, to a calendar item:



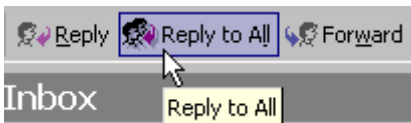
Using the Reply button

- The **Reply** button allows you to instantly create a reply message for a message selected from the Inbox Information view without having to open it:



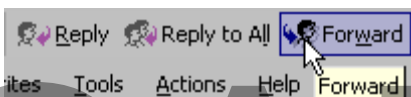
Using the Reply to All button

- The **Reply to All** button allows you to instantly create a reply message to all recipients addressed in the original message without having to open it:



Using the Forward button

- The **Forward** button allows you to instantly create a forwarding message to another recipient without having to open it:



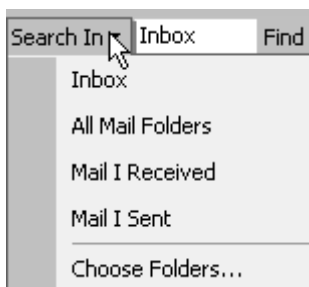
Using the Send and Receive button

- The **Send/Receive** button allows you to instantly refresh any mail being sent, or any mail coming in:



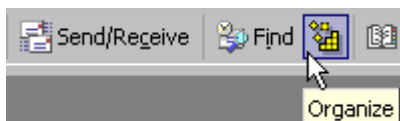
Using the Find button

- The **Find** button allows you to search for a message by contact name, content, or from any area that messages may be held:



Using the Organize button

- The **Organize** button opens the **Ways to Organize** Inbox view in the main viewing area:



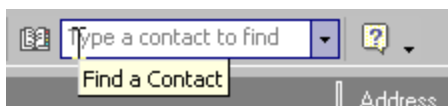
Using the Address Book button

- The **Address Book** button opens the Address book so you can search for and select a contact name:



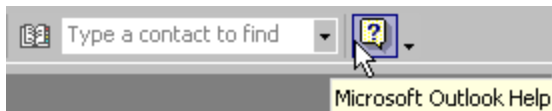
Using the Find a Contact field

- The **Find a Contact** field allows you to enter a contact name, and open the contact's information dialog box:



Using the Help button

- The **Help** button instantly opens the **Office Assistant**:



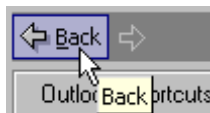
Using the Outlook Today Toolbar

- When **Outlook Today** is open in the main viewing area, it has its own toolbar functions:



Using the Back button

- The **Back** arrow button acts like an Internet application back button, allowing you to move back to past views as required:



Using the Forward button

- The **Forward** arrow button acts like an Internet application forward button, allowing you to move forward to a page after moving back from it. This button only becomes available once the Internet has been launched within the Outlook main viewing area, and the Back button has been used:



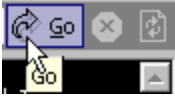
Using the Web Search Feature

- The **Web Search** feature and field acts as an Internet launcher. Any web application integrates with **Outlook**, so the web and any web pages can be accessed through **Outlook**.
- Either type a web page address, or select the arrow at the end of the field to open the drop-down menu containing a list of previously viewed sites:



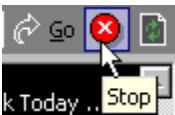
Using the Go button

- The **Go** button is used when a web page address is manually entered into the Address field. Selecting this button will automatically start the search for the page:



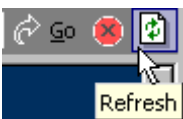
Using the Stop button

- The **Stop** button acts like an Internet application stop feature. When selected, the search for a page is stopped instantly:



Using the Refresh button

- The **Refresh** button acts like an Internet application refresh feature. When selected, the current page will refresh itself if necessary:

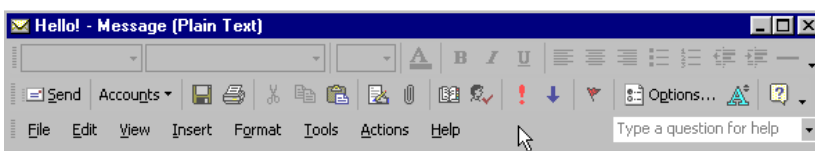


Using the Message Toolbars

- All Message boxes also have a toolbar that can be used to alter the text within the message box. The toolbars for **Plain Text** messages, **HTML** messages, and **Rich Text** messages allow different capabilities. The main menu bar in a message box remains the same for all three formats.

Using the Plain Text Message Toolbar

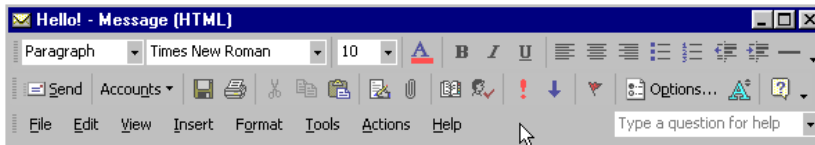
- A **Plain Text** message toolbar has only basic capabilities available:



- Only the basic toolbar shortcuts are available: **Send, Accounts, Save, Print, Paste, Add Signature, Insert File, Address Book, Check Names, Importance Levels**, the **Follow up** flag feature, **Options, Font Size** and **Help**. Advanced editing or style cannot be applied to the message text.

Using the HTML Message toolbar

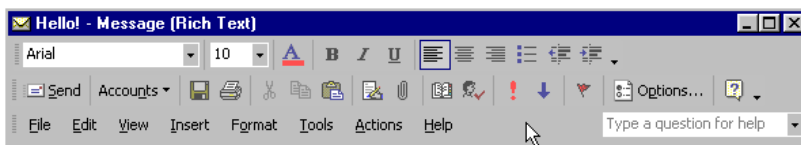
- An **HTML** message toolbar has all editing capabilities available to use:



- **Paragraph** style, including header and titles, can be inserted; **Fonts, Font Size** and **Color** can be set. **Alignment, Spacing** and **Horizontal Bar** insertion can all be applied to the HTML message text.

Using the Rich Text Message toolbar

- A **Rich Text** message toolbar has most of the same capabilities as an HTML message:



- The only difference is that **Paragraph** style with headers and titles cannot be inserted, and **Horizontal Bars** are also not available for a **Rich Text** message.

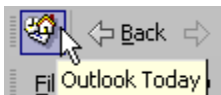
The Advanced Toolbar

Using the Advanced Toolbar

- The Advanced Toolbar holds more icon shortcuts to actions located in the main menu of Outlook.

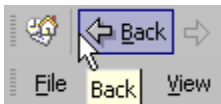
Using the Outlook Today button

- The **Outlook Today** button allows you to quickly open the Outlook Today pane in the main viewing area:



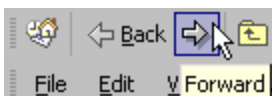
Using the Back button

- The **Back** arrow button allows you to move back from the current view in the viewing area to the preceding view:



Using the Forward button

- The **Forward** arrow button is active when using an Internet application through Outlook, allowing you to move forward to pages already viewed:



Using the Up One Level button

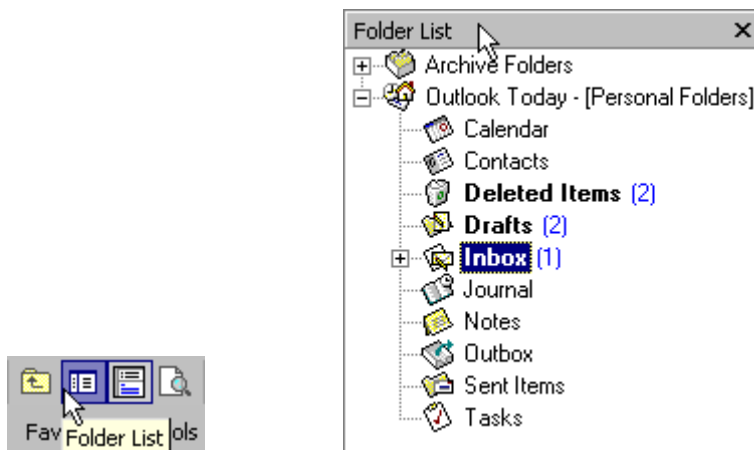
- The **Up One Level** button allows you to move up through the Folders List, if the Folder List bar is not open:



Using the Folder list button

- The **Folder List** button allows you to open the **Folder List** bar to view all folders, or close, as needed:

SAMPLE



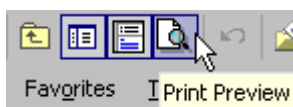
Using the Preview Pane button

- The **Preview Pane** button allows you to quickly open the message **Preview Pane** under the Information view:



Using the Print Preview button

- The **Print Preview** button allows you to open the **Print Preview** dialog box and view the selected item in the Information view that is to be printed:



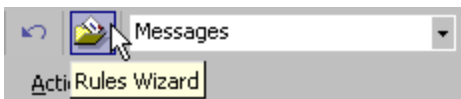
Using the Undo button

- The **Undo** button allows you to undo message deletions, without having to go into the **Deleted Items** folder, finding the item, and dragging it out:



Using the Rules Wizard button

- The **Rules Wizard** button allows you to quickly open the Rules Wizard:

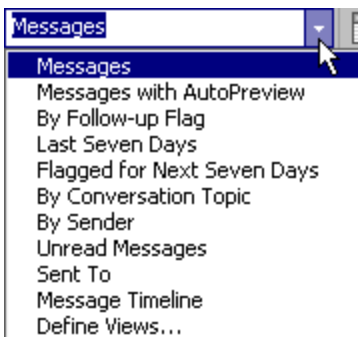


Using the Current View field

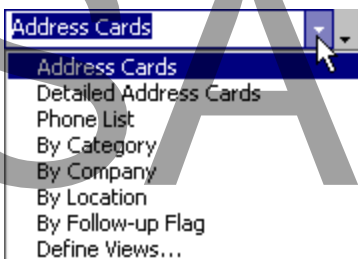
- The **Current View** field allows you to sort how items are viewed.
- If in a message folder, you can define how the messages should appear; by date, sender name and more.
- If in the **Contacts** Information view, contacts can be sorted by name, phone number and more:



- With the **Message Information** view:



- With the **Contact Information** view:



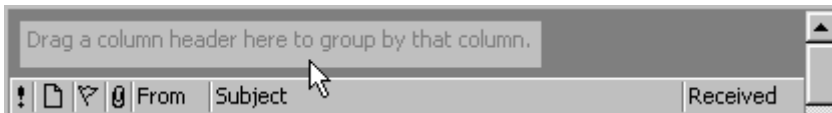
Using the Group By Box button

- The **Group By Box** button allows you to group emails by sender name, by subject heading, date received, and more:

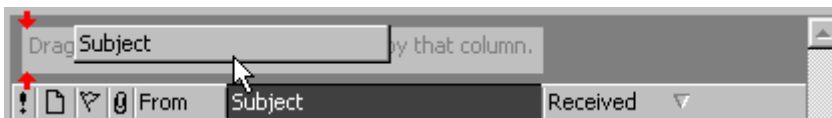


To Group By Box messages:

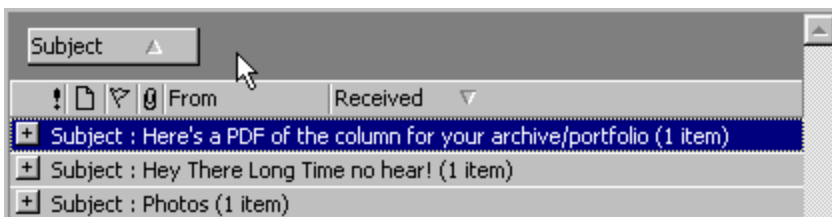
- Click on the **Group By Box** button in the **Advanced** toolbar.
- A gray editing space will appear above the message information headers in the Message Information view:



- Click on a column header that you want messages to be grouped by, and drag it into the gray space:



- All messages below the header line will now be grouped according to the header selected:



- **Select the + (plus sign)** button at the beginning of a group to expand and view all messages contained.
- To remove the grouping, simply select and drag the header out of the gray space back onto the header bar, where you want it to appear. Two red arrows will appear, showing where the insertion will be:



- Click on the **Grouping By Box** button again to remove the gray space above the header.

End of the preview sample



This sample is approximately half of the full course. Please see the table of contents at the beginning of this document to see the full list of topics covered in the full course.

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