

Crabby demystifies Outlook terms

Applies to: Microsoft Office Access 2007, Outlook 2007, Access 2003, Outlook 2003

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Crabby Office Lady

Ah, Outlook. Good old Outlook. We use it every day, all day, and still ... some of its terminology vexes us. Let's see if I can't assuage some of that pain this week so that we can get you to understand your right-hand program a bit better.

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Microsoft Office Outlook is something most of us cannot live without. And it's not just an e-mail program. It keeps our calendar up-to-date, it makes our contacts easy to access (and organize), and it helps us make sure we're getting work done by tracking tasks. In other words, it helps keep us ... sane.

But again, just as I wrote in my last two columns ([demystifying Word terms](#) and [demystifying Excel terms](#)), I want to make sure that we're all on the same page when it comes to talking about how great this program is. If you don't know what a protocol is, and if you have no idea what a rule is, and if you could care less about a signature, how can we effectively communicate? That's right; we can't. So today we'll get through some of the terms — eight of them — in Outlook that I think are crucial for you to know.

Ready, set ... define those terms

In previous columns, I *have* covered some basic terms when it comes to e-mail and e-mail protocols. I may repeat myself here once or twice, but only because I have the feeling that some of you still don't quite understand what some of these terms mean.

NOTE To get more specific information (including instructions and procedures) about any of the items I'll cover below, please refer to the **See Also** section at the top of this column.

RSS

I chose RSS (Really Simple Syndication) first because it's fairly new and it's greatly useful. RSS is a way for content publishers of online magazines, Web sites, news agencies, and so on to make news, blogs, and other content available to subscribers — and that content is usually free, and sent directly to your computer so that you can read it at your leisure. You find what you want, subscribe to it, and then every time the author updates the content or writes something new, it's delivered hot and fresh, right to your computer.

So, instead of having to go to your favorite sites every time you want to read what's new there, you can have the new content delivered to you. And, with Outlook 2007, you can have that content delivered there, probably the place where you spend most of your work time.

When you're browsing the Web, whenever you see the button indicating that an RSS Feed exists, you can subscribe to it in a variety of ways. The indication that an RSS Feed is available from a Web site or Web page is usually indicated by one of these three icons:



You can subscribe to RSS Feeds in a few ways:

- If you're using Windows Internet Explorer 7, and you see a button that indicates an RSS Feed exists for that page, all you need to do is click that button.
- If you're not using Internet Explorer 7, you can right-click the **Feed** icon or link on the page, and then click **Copy shortcut**. Then go to your preferred RSS reader and follow the instructions for how to copy the shortcut so that the feed will now be added to your list.
- You can copy the Internet address, known as the URL, of an RSS Feed directly in Outlook 2007.

Once you've added an RSS Feed, your RSS reader will check the RSS publisher's server for new and updated items on a regular schedule (that you can normally set up yourself).

Now if only the paper boy could toss my Sunday *New York Times* as accurately so I wouldn't have to tramp outside in my bathrobe to gather it up quickly before my neighbors see me before my morning coffee ...

Rules

A rule is simply something you set up within Outlook that performs certain actions on messages for which you've set certain permissions. It's a way to manage your messages automatically. Basically, you set up a rule in Outlook, and when you send a message — or when a message arrives in your mailbox — the rule is enacted. Some examples:

- If you want all the mail that comes from your old roommate, Donna, at Club Med Sandpiper (and all the mail that you send back to her) to go to a specific folder you've already set up ("Bad times, good people"), you create a rule for that. Then, whenever you receive a note from Donna or send one to her, those messages will "live" in that folder.
- If you want to flag a message (we'll get to flagged messages in a moment) that has specific criteria (such as who it's from, what the subject box contains, if it's sent only to you, and so on), you can create a rule that will do that.
- If you want to automatically delete any e-mail message that has certain words in the subject box or comes from a certain domain (that you happen to know is naughty-naughty-naughty), a rule is the trick.

The examples above are organization rules, but there are also notification rules. Notification rules alert you in some way when you receive a particular message. For example, you can create a rule so that a particular sound is played when a message arrives from someone (such as Great Aunt Gussie, who made a huge fortune, never married, never had any kids, never spent a dime ... and always favors you like her rose bushes. CA-CHING!). Another example is an alert that is sent to your cell phone when you get mail from your boss. This is particularly handy if you didn't claim vacation time and you're at the beach when he thinks you're slaving away at your home office. (Hint: Say your Internet service is down. Someone else told me about this ...)

Flagged messages

You can flag a message by clicking the little grayed-out flag that appears to the right of the message. Applying a flag to a message or a contact adds a visual reminder to help you remember to follow up (meaning don't just ignore it) on an item in some way. In Outlook 2003, you could choose different colors for flags, but in Outlook 2007, you can assign color categories to flagged items and associate the items with other related items across Outlook 2007.

When an e-mail arrives that you can't address right away or that is something you also want to look at in more depth tomorrow or next week, you can flag it and then ... it will appear in your **For Follow Up** Search Folder (in Outlook 2007 and Outlook 2003).

Also, you can set up a Quick Click Flag (the default flag that's assigned to an item when you click the **Flag Status** column in your Inbox or other table view) to assign your most frequently used flag with a single click.

So wave your flags proud and strong (and this is in addition to those of you driving the cars and pickups with those frayed flags — American flags, sports flags, school team flags, whatever — on the outside blowing in the wind, proclaiming your patriotism to your country, your city, your sport. How about you let everyone know about your undying patriotism to the folks who need you to do your job or who need your immediate help with a task at work? Now THAT's a flag for you.)

Signatures

You know how you like to write something personal at the end of a letter or even at the end of an e-mail message? For example, I have a friend who has an adopted daughter from Vietnam — just as I do — who ends all her e-mail messages with "Peace out" (which I love).

In Outlook, instead of having to type out "Love, Crabby" or "May the Crabby force be with you" (with all my contact information and favorite quote), you can set it up so that Outlook automatically adds a signature for you — one that you've already set up — to every new message you compose. You can also create one signature for new, outgoing messages, and a different one for responses. (See, if the person found your e-mail address and was able to write to you, chances are they don't need your e-mail address and all that other contact info *again*. So your signature that you use for replying can be somewhat abbreviated. But hey, I'm not telling you what to do; I'm just suggesting.) And you can also create a signature for family and friends and one for business contacts. (And by the way, my example of "Love Crabby" was just that: an *example*. I use it for neither business nor personal mail. That would be a tad ... *odd*, now wouldn't it?)

I do need to add that when you create your outgoing signature in Outlook, there are advantages if you're using Word as your editor: You can insert pictures and hyperlinks (something you can't do in Outlook alone). As well, in Outlook 2007, you can include your electronic business card to immediately catch your recipient's eye. (An electronic business card is something you create in Outlook Contacts that is just like a paper business card: It can contain your company logo, design, individualized layout, font, color, and so on.)

And now I'm going to show you what *MY* signature looks like when I send messages to people within Microsoft. Note that yes, I use Outlook 2007 and yes, this is the signature I use *just* for the first message I send to a person or group; my response signature is quite a bit abbreviated.



I also want to say here that in general, your signature should not be longer and more involved than the message itself. Your name, your e-mail address, your office location, and your phone number should suffice. Multiple inspirational quotes, shoe size, birthday, favorite places to eat when in Tokyo — these are going a tad overboard. (But again, just a suggestion.)

.Pst file

Psssst ... I have a secret: A .pst file isn't as complicated as you might think. It's really simple, and I'm going to make this short and sweeeeet: A .pst stands for Personal Folders file (why it isn't *.pff*, I have no idea; I just write the column, folks, I don't write the programs).

We can't talk about the .pst without talking about her uncle, the .ost.

- If you use Microsoft Exchange Server, typically your e-mail messages, calendar, and other items are delivered to and stored on the server. If you're NOT connected to the server, a local copy of your items is kept on your computer in an Offline Folder file, an .ost. (Again, not an .off and I don't know why.) Offline Folder files allow you to work with your items when a connection to the Exchange server may not be possible (or even wanted, for whatever reason — and that is your personal business).
- Your items can also be moved or archived to a .pst. Since a .pst file is kept on your computer, it is not subject to mailbox size limits on the server. Outlook can be configured to deliver new items to a .pst file.
- If you DON'T use Microsoft Exchange Server, you have no choice: Your e-mail messages, calendar, and other items are delivered to and stored locally in a .pst.

Here is what I like about .pst files: They can be password protected; you can save everything you've ever sent or received forever and ever (or until your computer crashes and you didn't have the wherewithal to back up your information, not that I didn't warn you many times to do so).

To wrap up: A .pst is a way to archive your mail (and other Outlook stuff such as Calendar items and Contacts) on your own computer.

OOF message

If you're going on vacation or you will be out for the day because you're sick (or playing sick), it's a good idea to leave an outgoing message (affectionately known as your OOF: "Out of Office") so you don't leave people hanging. Wouldn't it be great if your mail program — say, Outlook — could send an automatic response that you so craftily created before you left town? Well, Outlook can.

When your company is running Outlook with Microsoft Exchange Server, you can use a handy feature called the Out of Office Assistant. This feature lets you create a reply message to e-mail sent to you while you're away. From within that feature, you can also set up specific rules about how to file the messages, who to respond to, how often, etc.

The Out of Office Assistant isn't available if you're not using Outlook with Exchange. (Read that sentence again, please: no Exchange, no Assistant.) You are not, however, left out in the cold. You can create a rule combined with a template in Outlook to mimic the Out of Office Assistant — whether you use a POP3 or IMAP e-mail account (more on that later).

Whether you use the Out of Office Assistant or set up a rule, consider mentioning that you're out of the office, note when you'll be returning, and give the sender another person to contact (if anyone) in your absence. If you want to give an alternative number or e-mail address that could be used to track you down, that's up to you. But realize, then, that you're fair game for work-related calls just when you're having the best golf game of your life.

NOTE Again, for specifics on how to send an automatic "I am gone so don't expect anything from me" message, check out the **See Also** section at the top of this column.

Protocol

An e-mail protocol does not have anything to do with diplomacy (at least not in Outlook). Simply put, an e-mail protocol is an agreed-upon format for sending and receiving e-mail messages. Examples of protocols:

- **POP3** When you use the very common Post Office Protocol version 3 (POP3), your e-mail is stored on your e-mail provider's server initially. But once you go and "get it" from Outlook (or whatever e-mail program you use), it's downloaded to your computer and is no longer stored on the server. If you want to keep it, you can either never delete it from your program, or you can create a copy of it and keep it somewhere on your computer (and hopefully you're better at remembering where you put it than I am).
- **IMAP** Internet Message Access Protocol (IMAP) is a way to access your e-mail on a server and, if you like, keep your e-mail messages stored there instead of on your local computer.
- **HTTP** You use HTTP when you have an account with Windows Live Hotmail (formerly known as MSN Hotmail), Yahoo!, or any other Web-based e-mail service, or you're using Microsoft Exchange Server and Microsoft Outlook Web Access (OWA). Note that HTTP accounts are also not as private as POP3 accounts since your messages are stored on an external server. Also, the amount of space you get to store messages is limited; if you go over that set amount you won't be able to get or send more messages until you clean your room.
- **MAPI** Does MAPI make you happy? (I have a mug that says it does.) Messaging Application Programming Interface (MAPI) is used with Outlook in conjunction with a Microsoft Exchange Server mail server. MAPI is a lot like IMAP (in fact, it's an anagram of it), but it provides a wider array of features when you use it from within Outlook. In fact, MAPI makes it possible for other Microsoft Office programs (such as Word and Excel) to work with your e-mail program.

E-mail client vs. e-mail server

I swear this makes me crazy. I have relatives who ask me, time and time again, "If I change to MSN or to Comcast, can I still get my e-mail in Outlook?" And then I have to go through the entire explanation of the difference between *client* and *server*.

So I'm used to this. Again, short and sweet:

- An e-mail *client* is the software program on your computer that enables you to send, receive, and work with your e-mail. Examples of e-mail clients are Outlook, Entourage, and Eudora.
- An e-mail *server* is where your outgoing messages go to before they're sent to your recipients, and where your e-mail messages come *from* when they're sent to you. An e-mail server is like the post office — it's like your postal worker. Someone or some *thing* has to be able to sort and then deliver. That is what the server does. Your client can't do that; it just sits there. It's merely your mailbox. If either you haven't paid a

company to send you your e-mail messages, or you haven't signed up for a free service like Windows Live Hotmail, you will not be getting your e-mail, no matter how special you think your client is. A fancy mailbox is nothing without your postman. So please: Give him or her a nice holiday bonus.

"Sentimentality is the emotional promiscuity of those who have no sentiment." — Norman Mailer

About the author

Annik Stahl, the Crabby Office Lady columnist, takes all of your complaints, compliments, and knee-jerk reactions to heart. Therefore, she graciously asks that you let her know whether this column was useful to you — or not — by entering your feedback using the **Was this information helpful?** tool below. And remember: If you don't vote, you can't complain.

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