Using Outlook 2007
# Table of Contents

What’s New in Outlook 2007 ................................................................................................................................. 7
Understanding Items .................................................................................................................................................... 9
Understanding the Message Window ..................................................................................................................... 10
Understanding the Ribbon ......................................................................................................................................... 11
- Tabs ........................................................................................................................................................................ 11
- Groups ................................................................................................................................................................. 11
- Buttons ............................................................................................................................................................... 11
Using the Office Button and Quick Access Toolbar ............................................................................................... 12
- Office Button ...................................................................................................................................................... 12
- Quick Access Toolbar ......................................................................................................................................... 12
Using the Navigation Pane ......................................................................................................................................... 13
- Switch between panes ........................................................................................................................................... 13
Using the To-Do Bar ................................................................................................................................................... 14
- Display the To-Do Bar .......................................................................................................................................... 14
Using Menus and Toolbars ....................................................................................................................................... 15
- Menu bar ............................................................................................................................................................. 15
- Toolbars ............................................................................................................................................................... 15
- Contextual menus .................................................................................................................................................. 15
- Mini Toolbar ......................................................................................................................................................... 16
Using Keyboard Commands .................................................................................................................................... 17
- Keystroke shortcuts ............................................................................................................................................... 17
- Key Tips ............................................................................................................................................................... 17
Using Help ................................................................................................................................................................. 18
- Search for help ...................................................................................................................................................... 18
- Browse for help .................................................................................................................................................... 18
Creating/Addressing E-mail ..................................................................................................................................... 20
Creating Email ........................................................................................................................................................... 20
- Addressing Messages ........................................................................................................................................... 20
Creating/Inserting a Signature .................................................................................................................................. 21
- Create a signature ................................................................................................................................................ 21
Attaching Files to a Message ..................................................................................................................................... 22
Attaching Items to a Message ................................................................................................................................... 22
Inserting Calendars into a Message ........................................................................................................................ 22
Specifying Message Options .................................................................................................................................... 23
- Request a read or delivery receipt ....................................................................................................................... 23
- Other Options ...................................................................................................................................................... 23
Recalling a Message .................................................................................................................................................. 24
- Recall a message .................................................................................................................................................. 24
Saving Unfinished Messages (Drafts) ...................................................................................................................... 25
- Save an unfinished message ............................................................................................................................... 25
- Open a saved message ....................................................................................................................................... 25
Using the Out of Office Assistant .......................................................................................................................... 26
Reading E-mail .......................................................................................................................................................... 28
<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deleting E-Mail</td>
<td>28</td>
</tr>
<tr>
<td>Simple vs. Permanent Delete</td>
<td>28</td>
</tr>
<tr>
<td>Opening/Saving Attachments</td>
<td>29</td>
</tr>
<tr>
<td>Open an attachment</td>
<td>29</td>
</tr>
<tr>
<td>Save an attachment</td>
<td>29</td>
</tr>
<tr>
<td>Save multiple attachments</td>
<td>29</td>
</tr>
<tr>
<td>Flagging a Message for Follow-up</td>
<td>30</td>
</tr>
<tr>
<td>Flag a message</td>
<td>30</td>
</tr>
<tr>
<td>Change flags</td>
<td>30</td>
</tr>
<tr>
<td>Set a reminder date</td>
<td>30</td>
</tr>
<tr>
<td>Remove a flag</td>
<td>31</td>
</tr>
<tr>
<td>Using Color Categories</td>
<td>32</td>
</tr>
<tr>
<td>Assign a color category</td>
<td>32</td>
</tr>
<tr>
<td>Clear a category</td>
<td>32</td>
</tr>
<tr>
<td>Rename a category</td>
<td>32</td>
</tr>
<tr>
<td>Create a new category</td>
<td>33</td>
</tr>
<tr>
<td>Change the Quick Click category</td>
<td>33</td>
</tr>
<tr>
<td>Sorting Messages</td>
<td>34</td>
</tr>
<tr>
<td>Changing Views</td>
<td>35</td>
</tr>
<tr>
<td>Using Instant Search</td>
<td>37</td>
</tr>
<tr>
<td>Enable Instant Search</td>
<td>37</td>
</tr>
<tr>
<td>Find a message or item</td>
<td>37</td>
</tr>
<tr>
<td>Use recent searches</td>
<td>38</td>
</tr>
<tr>
<td>Refining a Search</td>
<td>38</td>
</tr>
<tr>
<td>Expand a search</td>
<td>38</td>
</tr>
<tr>
<td>Refine a search</td>
<td>38</td>
</tr>
<tr>
<td>Change search options</td>
<td>38</td>
</tr>
<tr>
<td>Creating and Using Folders</td>
<td>39</td>
</tr>
<tr>
<td>Create a new folder</td>
<td>39</td>
</tr>
<tr>
<td>Move messages between folders</td>
<td>39</td>
</tr>
<tr>
<td>Managing Folders</td>
<td>40</td>
</tr>
<tr>
<td>Rename a folder</td>
<td>40</td>
</tr>
<tr>
<td>Move a folder</td>
<td>40</td>
</tr>
<tr>
<td>Delete a folder</td>
<td>40</td>
</tr>
<tr>
<td>Creating a Rule</td>
<td>41</td>
</tr>
<tr>
<td>Create a rule by example</td>
<td>41</td>
</tr>
<tr>
<td>Creating a Rule with the Rules Wizard</td>
<td>42</td>
</tr>
<tr>
<td>Managing Contacts</td>
<td>44</td>
</tr>
<tr>
<td>Adding a Contact</td>
<td>44</td>
</tr>
<tr>
<td>Adding an E-mail Sender to Your Contacts</td>
<td>45</td>
</tr>
<tr>
<td>Editing and Deleting Contacts</td>
<td>46</td>
</tr>
<tr>
<td>Edit a contact</td>
<td>46</td>
</tr>
<tr>
<td>Delete a contact</td>
<td>46</td>
</tr>
<tr>
<td>Changing Contact Views</td>
<td>47</td>
</tr>
<tr>
<td>Working with Distribution List</td>
<td>48</td>
</tr>
<tr>
<td>Create a distribution list</td>
<td>48</td>
</tr>
<tr>
<td>Send an e-mail using a distribution list</td>
<td>49</td>
</tr>
</tbody>
</table>
Welcome to Microsoft Outlook 2007!

Microsoft Outlook lets you send and receive e-mail messages, schedule appointments, and organize your contacts and addresses. It also reminds you of tasks you need to complete.

This chapter introduces the Outlook fundamentals. Besides learning how to start and exit the Outlook program, you will learn how to find your way around the Outlook screen and item windows. You will also learn how to use keyboard commands and access Outlook’s help features. Let’s get started!
What’s New in Outlook 2007

Here are some of the items in Outlook 2007 that are somewhat different from previous versions.

**Instant Search**  
Office Outlook 2007 provides a new fast way to find your information, no matter which folder it is in. Outlook now uses the same search technology that Microsoft Windows does, to deliver fast results regardless of mailbox size. In addition, an improved visual design displays each individual result of your search immediately, as soon as it is available, while the search is still running. Search now appears in the same place no matter where you are in Outlook. You can also forward your search query to Windows Desktop Search for a broader search of your entire computer.

**Color Categories**  
New Color Categories give you a quick, visual way to customize items and to distinguish items from one another, making it easy to locate information. Suppose, for instance, that you want to assign a color category to all items related to a certain project. You can add the same color category to e-mail, calendar, and task items so that you can easily locate all items from that project at a glance. When you need to find the information later, you can search and sort by Color Categories to quickly and visually identify what you are looking for.

**Attachment previewing**  
Using the new Attachment Previewer, you can view your attachments from within the Reading Pane by making only a single click. This improvement saves you time and allows you to view attachments in context with the e-mail message.

**Minimized Navigation Pane**  
The Navigation Pane can now be minimized into a vertical button bar, to provide you with a larger work area while allowing quick access to Favorite Folders and other views.

**Week view changed in Calendar**  
Office Outlook 2007 features a new week view. The former week view was a two-column layout of days, similar to a day planner. The new week view is similar to the work week views in previous versions.

**Flagging mail for follow-up**  
Flags are now more useful throughout Outlook. You can use a flag to quickly create a follow-up item that can be tracked in the To-Do Bar, in your Inbox, and even in Calendar. They are also still handy for setting reminders for yourself and other people.

**Task integration on the Calendar**  
Office Outlook 2007 integrates tasks on the calendar into the Daily Task List so that you see them displayed beneath your daily appointments and meetings. To allot time for working on a task, you simply drag the task onto your calendar. When you complete a task on a given day, the task sticks to that day, providing a visual record of the work that you performed. Tasks that you do not complete roll over to the next day, and accumulate until you mark them as complete.

**Improved scheduling capabilities**  
Improved scheduling capabilities in Office Outlook 2007 and Exchange 2007 help you to schedule meetings easily and in less time. When you use Exchange 2007, attendee schedules are reviewed, and an ideal meeting time and location is recommended. A number of other improvements in Office Outlook 2007 make the calendaring experience easier for people who are using Exchange 2003 or Exchange 2007. When changes are made to the meeting location or agenda, attendees receive an informational update, rather than having to reaccept the meeting. Additionally, changes are highlighted in the meeting update, making it easier to locate the information that has been modified.

**Really Simple Syndication (RSS) Feeds**  
RSS Feeds provide a convenient way for content publishers to distribute information in a standardized format. A common example of RSS content is the sources for information that is updated frequently, such as news headlines and personal Web logs (called blogs). The benefit of RSS is the aggregation of all content from multiple Web sources in one place, along with not having to provide your e-mail address to content publishers to receive the information. You no longer have to visit various Web sites to obtain the latest information on your topics of interest.

**Calendar Snapshots**  
You can send your calendar to anyone in an e-mail message. The recipient can open the calendar either in their Web browser or in Outlook.

**Calendar overlays**  
Viewing calendars in overlay mode enables you to navigate multiple calendars on top of one another, making it easier to compare your calendar with a coworker's or team calendar to find a free time to meet.

**Electronic Business Cards**  
You can create and share customized Electronic Business Cards, which provide a personalized way to communicate your information. You can share your card either as an attachment or as part of your e-mail signature. Electronic Business Cards allow you to customize your contact information, and also to add logos and photos, making contacts more personally relevant and easier to locate. Electronic Business Cards can be exchanged easily through e-mail messages, and can be saved to your Contacts folder.

**Out of Office Assistant**  
Previously, when you started Outlook, and your Out of Office Assistant was turned on, an information alert dialog box appeared. In Office Outlook 2007, when you have Out of Office auto reply turned on, a notice appears on the status bar. When you use an Exchange 2007 account, you can now schedule your Out of Office times in advance and not have to worry about forgetting to turn the Out of Assistant on or off. Additionally, when you use Exchange 2007 e-mail accounts, you can specify separate messages for recipients who are inside your organization and those who are outside of it.

**Unified messaging**  
Using Exchange 2007, you can have voice mail and faxes delivered to your Office Outlook 2007 Inbox.
Understanding the Outlook 2007 Program Screen

The Outlook 2007 program screen may seem confusing and overwhelming at first. This lesson will help you become familiar with it.

**Title bar:** Displays the name of the program you are currently using (Outlook) and the item you are currently working with (Inbox).

**Close button:** Click the close button in the Title bar to exit the Outlook program.

**Menu bar:** Displays a list of menus that you use to give commands to Outlook. Clicking a menu name displays a list of commands—for example, clicking the Edit menu name displays different editing commands like Cut and Paste.

**To-Do Bar:** Keep tabs on your calendar, appointments, and tasks all in one place. The To-Do Bar can also be displayed in a minimized format.

**Standard toolbar:** Contains buttons for common commands such as creating new items, printing items, and getting help. The buttons on the Standard toolbar change depending on what you’re working on.

**Status bar:** Displays messages and feedback.

**Inbox:** Folder that displays your incoming e-mail messages.

**Navigation Pane Buttons:** Click a button to see the folders and tools for a certain category—i.e. Mail, Calendar, or Contacts.
Understanding Items

In Outlook, an item is the basic element that holds information. Items are used to send and view e-mails, and also to organize information like tasks and contacts.

Since they present different types of information, different types of items differ in their appearance.

Outlook Items provides an overview of items available in Outlook.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mail Message</td>
<td>Compose a message to be sent by e-mail.</td>
</tr>
<tr>
<td>Appointment</td>
<td>Add an appointment to your calendar.</td>
</tr>
<tr>
<td>Meeting Request</td>
<td>Set up an appointment to which you invite other people or reserve resources such as a conference room.</td>
</tr>
<tr>
<td>Contact</td>
<td>Enter information about a person including their name, company, job title, and e-mail address.</td>
</tr>
<tr>
<td>Distribution List</td>
<td>Create a collection of contacts that allows you to quickly send mass e-mails.</td>
</tr>
<tr>
<td>Task</td>
<td>Enter to-do items that can be tracked until completion.</td>
</tr>
<tr>
<td>Task Request</td>
<td>Inform someone else of a task you would like them to perform.</td>
</tr>
<tr>
<td>Journal Entry</td>
<td>Keep track of interactions and files that you create—such as e-mails or Word documents—in a timeline view.</td>
</tr>
<tr>
<td>Note</td>
<td>Leave yourself a note so you remember to do something. Can be sorted using color categories.</td>
</tr>
</tbody>
</table>
**Understanding the Message Window**

The mail message window, like other item windows in Outlook 2007, features the new Ribbon in place of menus and toolbars. This lesson will help you become familiar with the basic features of the message window.

**Office Button and Quick Access Toolbar:** The Office Button allows you to see everything you can do to your document. The Quick Access Toolbar contains common commands such as Save and Undo. You can add more commands as well.

**Send button:** Click here to send the message once you’ve finished composing it.

**Ribbon:** The tabs and groups of commands on the Ribbon replace the menus and toolbars found in the message window in previous versions of Outlook.

**Message Area:** Type your e-mail message here as you would using a word processor.

**Recipients:** Enter the e-mail addresses of the recipients in the To field. Use the CC field to send a copy of the message to any recipients who are not directly involved, but who might be interested in the message.

**Signature:** You can create a customized signature that appears on your messages. You can include contact information and even a logo.

**Subject line:** Enter a title here so that recipients quickly know the reason for your e-mail.

**Scroll bar:** Use the scroll bar to view different parts of a long message.
Understanding the Ribbon

In most of the Office 2007 programs, menus and toolbars have been completely replaced by the Ribbon. Outlook 2007 is different. Menus and toolbars remain on the Outlook 2007 program screen, while the new Ribbon appears only in item windows such as message windows. The Ribbon keeps commands visible while you work instead of hiding them under menus or toolbars.

The Ribbon is made up of three basic components:

Tabs

Commands are organized into tabs on the Ribbon. Each tab contains a different set of commands. In Outlook, there are two different types of tabs:

- **Command tabs**: These tabs appear by default whenever you open an item window. For example, in a new message window, the Message, Insert, Options and Format Text tabs appear by default.
- **Contextual tabs**: Contextual tabs appear whenever you perform a specific task and offer commands relative to only that task. For example, if you insert a table in a message, the Design and Layout tabs appear on the Ribbon.

Groups

The commands found on each tab are organized into groups of related commands. For example, the Basic Text group contains commands for formatting message text. Click the Dialog Box Launcher ( ) in the bottom-right corner of a group to display even more commands. Some groups also contain galleries that display several formatting options.

Buttons

One way to issue a command is by clicking its button on the Ribbon. Buttons are the smallest element of the Ribbon.

Tips

- You can minimize the Ribbon so that only tab names appear, giving you more room in the item window. To do this, double-click the currently displayed command tab. To display the Ribbon again, click any tab.
- Based on the size of the item window, Outlook changes the appearance and layout of the commands within the groups.
Using the Office Button and Quick Access Toolbar

Near the Ribbon at the top of an item window are two other tools you can use to give commands in Outlook 2007: The Office Button and the Quick Access Toolbar.

Office Button
The Office Button appears in the upper-left corner of an item window and contains basic file management commands including New, which creates a new item; Save, which saves the current item; and Close, which closes the currently opened item.

Tips

✓ The Office Button replaces the File menu found in item windows in previous versions of Outlook.

Quick Access Toolbar
The Quick Access Toolbar appears to the right of the Office Button and provides easy access to the commands you use most frequently. By default, the Save, Undo, Redo, Previous Item and Next Item buttons appear on the toolbar; however, you can customize this toolbar to meet your needs by adding or removing buttons. To customize it:

• Click the Customize Quick Access Toolbar button at the end of the Quick Access Toolbar and select the commands you want to add or remove.

Tips

✓ You can change where the Quick Access Toolbar appears in the program window. To do this, click the Customize Quick Access Toolbar button at the end of the Quick Access Toolbar. Select Show Below the Ribbon or Show Above the Ribbon, depending on the toolbar’s current location.

Figure 1-4: The Quick Access Toolbar.
Using the Navigation Pane

The Outlook program is made up of several sets of tools and folders, each with their own separate and unique screens. You can switch between these sets of tools by using the Navigation Pane.

The Mail pane appears by default when you start Outlook, but you can display other panes by clicking different Navigation Pane buttons such as Calendar, Contacts, or Tasks.

Switch between panes

• Click a navigation pane button (for example, Mail, Calendar, Contacts, or Tasks) in the Navigation Pane.

  The selected pane appears.

💰Other Ways to Switch Panes: Click Go on the menu bar and select the pane you want to view.

Table 1-3: The Navigation Pane provides an overview of the contents of the Navigation Pane.

✅ Tips

√ To minimize or expand the Navigation Pane in the window, click the Minimize the Navigation Pane or Expand the Navigation Pane button at the top of the Navigation Pane.

- Inbox - Contains all your recent incoming e-mail messages.

- Unread Mail - Contains all your unread messages.

- Sent Items - Stores copies of messages you have sent.

- Mailbox - Provides a preview of your day; summarizes appointments, tasks, and new e-mail messages.

- Deleted Items - Works like the Windows Recycle Bin; where you can find deleted Outlook items.

- Drafts - Stores draft messages that you haven’t yet completed.

- Outbox - Temporarily stores any messages that you’ve composed that have not been sent.

- Junk E-mail - Contains messages that are considered spam. Check this folder periodically for incorrectly flagged messages.

- RSS Feeds - Allows you to access content that you’ve subscribed to via RSS feed, such as news and blogs.
Table 1-3: The Navigation Pane

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Search Folders" /></td>
<td>Provides quick access to color categorized messages, messages flagged for follow-up, messages with large attachments, and unread messages.</td>
</tr>
<tr>
<td><img src="image" alt="Calendar" /></td>
<td>Enables you to view and schedule appointments, events, and meetings.</td>
</tr>
<tr>
<td><img src="image" alt="Contacts" /></td>
<td>Stores addresses, numbers, e-mail addresses, and other information about people you contact.</td>
</tr>
<tr>
<td><img src="image" alt="Tasks" /></td>
<td>Allows you to organize and manage to-do items.</td>
</tr>
<tr>
<td><img src="image" alt="Notes" /></td>
<td>Works like electronic sticky notes; allows you to jot down quick bits of information.</td>
</tr>
<tr>
<td><img src="image" alt="Folder List" /></td>
<td>Displays all the folders in Microsoft Outlook.</td>
</tr>
<tr>
<td><img src="image" alt="Shortcuts" /></td>
<td>Contains shortcuts (that you add yourself) to other folders, such as the My Documents folder.</td>
</tr>
<tr>
<td><img src="image" alt="Configure buttons" /></td>
<td>Allows you to add or remove buttons from the Navigation Pane.</td>
</tr>
<tr>
<td><img src="image" alt="Journal" /></td>
<td>Records information about items you send or receive and files you create (not shown by default).</td>
</tr>
</tbody>
</table>

Using the To-Do Bar

The To-Do Bar is new for Outlook 2007 and combines a basic calendar, the day’s appointments, and current tasks into one pane. It allows you to keep tabs on multiple sources of information in Outlook all at once.

Display the To-Do Bar

• Select **View → To-Do Bar → Normal** from the menu.

The To-Do Bar appears on the right-hand side of the screen.

**Tips**

- To minimize the To-Do Bar, click the **Minimize the To-Do Bar** button, which is located at the top of the To-Do Bar.
- If you click a date on the calendar in the To-Do Bar, the Calendar module is displayed on the screen.

![Figure 1-6: The To-Do Bar.](image)
Using Menus and Toolbars

Using menus and toolbars are two good ways to give commands in Outlook. While they have been replaced by the Ribbon in item windows, they still remain on the Outlook 2007 program screen.

There are also two more tools that you can use in Outlook 2007 that make relevant commands even more readily available: contextual menus and the Mini Toolbar.

Menu bar

The menu bar is located just beneath Outlook’s title bar. The menus on the menu bar include: File, Edit, View, Go, Tools, Actions, and Help. Within each menu is a list of related commands. To issue a command using a menu:

1. Click the menu name with the mouse.
   
   The menu appears.

   *Other Ways to Open a Menu:* Press <Alt> and then the underlined letter in menu.

2. Select a command from the menu.

   *Tip:* Additional submenus will appear under certain menu items.

Toolbars

Outlook’s toolbars provide an even faster way to give commands. By default, the Standard toolbar appears on the program screen, displaying buttons for issuing the most commonly used commands. To give a command using a toolbar:

- Click the button on the toolbar for the command you want to issue.

*Tips*

- To display the Advanced and Web toolbars, right-click anywhere in the menu or toolbar area of the Outlook program screen and select the toolbar you want to display from the menu.

- Toolbar buttons change depending on which folder is open. For example, when the Inbox is displayed, Outlook displays message-related buttons. When Calendar is displayed, appointment-related buttons appear.

- To display a toolbar button’s description, point to the button and wait a second. A ScreenTip appears, telling you what the button does.

Contextual menus

Another type of Outlook menu, a *contextual menu*, displays a list of commands related to a specific object or area. To open a contextual menu:

1. Right-click an object or area in the item window or program screen. A contextual menu appears, displaying commands that are relevant to the object or area you clicked.

2. Select an option from the contextual menu, or click anywhere outside the contextual menu to close it without selecting anything.
Mini Toolbar

New in Outlook 2007 is the Mini Toolbar, which appears when you select text in a new item window, and contains common text formatting commands. To view the Mini Toolbar:

1. Select text in an item window.
   
The Mini Toolbar appears above the text you selected.

   **Trap:** Sometimes the Mini Toolbar can be hard to see due to its transparency. To make the Mini Toolbar more visible, use pointer to point to it.

   **Tip:** A larger version of the Mini Toolbar also appears along with the contextual menu whenever you right-click in an item window.

2. Click the desired command on the Mini Toolbar or click anywhere outside the Mini Toolbar to close it.

![Figure 1-11: A contextual menu.](image)

![Figure 1-12: The Mini Toolbar.](image)
Using Keyboard Commands

Another way to give commands in Outlook 2007 is using the keyboard. There are two different types of keyboard commands in Outlook 2007: keystroke shortcuts and Key Tips.

Keystroke shortcuts

*Keystroke shortcuts* can save time when issuing common commands, such as creating a new mail message.

In order to issue a command using a keystroke shortcut, you simply press a combination of keys on your keyboard. For example, rather than clicking the New button on the Table 1-4: Common Keystroke Shortcuts

<table>
<thead>
<tr>
<th>Shortcut</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;Ctrl&gt; + &lt;O&gt;</td>
<td>Opens the selected item.</td>
</tr>
<tr>
<td>&lt;Ctrl&gt; + &lt;N&gt;</td>
<td>Creates a new item.</td>
</tr>
<tr>
<td>&lt;Ctrl&gt; + &lt;S&gt;</td>
<td>Saves the currently opened item.</td>
</tr>
<tr>
<td>&lt;Ctrl&gt; + &lt;P&gt;</td>
<td>Prints the selected item.</td>
</tr>
<tr>
<td>&lt;Ctrl&gt; + &lt;B&gt;</td>
<td>Toggles bold font formatting.</td>
</tr>
<tr>
<td>&lt;Ctrl&gt; + &lt;I&gt;</td>
<td>Toggles italic font formatting.</td>
</tr>
<tr>
<td>&lt;Ctrl&gt; + &lt;C&gt;</td>
<td>Copies the selected text or object.</td>
</tr>
<tr>
<td>&lt;Ctrl&gt; + &lt;X&gt;</td>
<td>Cuts the selected text or object.</td>
</tr>
<tr>
<td>&lt;Ctrl&gt; + &lt;V&gt;</td>
<td>Pastes the selected text or object.</td>
</tr>
</tbody>
</table>

Standard toolbar to create a new mail message, you could press and hold the keystroke shortcut, <Ctrl> + <N>.

Table 1-4: Common Keystroke Shortcuts provides an overview of commonly used keystroke shortcuts.

Key Tips


To issue a command using a Key Tip:

1. Press the <Alt> key.
   Tiny letters and numbers, called *badges*, appear on the Office Button, the Quick Access Toolbar, and all of the tabs on the Ribbon.

2. Depending on the tab or command you want to select, press the letter or number key indicated on the badge.

3. Repeat this step as necessary until the desired command has been issued.

![Key Tip badge](image)
Using Help
When you don’t know how to do something in Outlook 2007, look up your question in the Outlook Help files. The help files can answer your questions and offer tips about Outlook’s features.

Search for help
1. Click the Microsoft Office Outlook Help button ( ) on the Standard toolbar.

   The Outlook Help window appears.

   Other Ways to Open the Help window: Press <F1> or type a question in the “Type a question for help” box on the menu bar.

2. Type what you want to search for in the “Type words to search for” box and press <Enter>. A list of help topics appears.
3. Click the topic that best matches what you’re looking for.

   Outlook displays information regarding the selected topic.

Browse for help
1 Click the Microsoft Office Outlook Help button ( ) on the Standard toolbar

2 Click the category that you want to browse.
The topics within the selected category appear.

3 Click the topic that best matches what you’re looking for.

   Outlook displays information regarding the selected topic.

Back  Click here to move back to the previous help topic.
Forward Click here to move forward to the next help topic.
Home  Click here to return to the Help home page.
Print  Click here to print the current help topic.
Change Font Size Click here to change the size of the text in the Help window.
Show Table of Contents Click here to browse for help using the Table of Contents.
Keep On Top/Not on Top Click here to layer the Help window so that it appears behind or in front of all other Microsoft Office programs.
This chapter covers two of the most-used functions in Microsoft Outlook: How to compose and send an e-mail message.

The steps involved in composing and sending a message are pretty basic, but there’s quite a bit you can do in between these processes to maximize the effect that your messages have. This chapter will show you how to insert a signature, attach a file to a message, and more.
Creating/Addressing E-mail

Creating Email
This lesson explains how to perform the most basic e-mail task of all: how to compose an e-mail message.

1. Click the **Mail** tab in the Navigation Pane.
2. Click the **New** button on the Standard toolbar.

An Untitled – Message window appears.

**Other Ways to Create a New Message:**
Select **File → New** from the menu and select **Mail Message** from the submenu. Or, press **<Ctrl>+<N>**.

Addressing Messages
Type the recipient’s name or email address in the **To**, **Cc** and/or **Bcc** field(s).

To address a message to more than one person, separate names with semicolons (e.g., Jane Smith; Smith, Joe; Sam.Hollinsworth@yahoo.org) or hit **Enter** after each name.

If the recipient is in the Global Address List (WSCC’s Directory) or your Contacts (Personal Address Book), simply type the person’s name and Outlook will automatically perform a **Check Names** within seconds of your moving to the Subject line.

To check the names more quickly, click **Check Names** on the ribbon.

- If Outlook finds the email address, the name will be underlined in black. To see what address it is using, right-click the underlined name and then click Outlook Properties.
- If Outlook finds more than one match for the name, it will underline the name in red. To select the person you want, right-click the name underlined in red.
- If Outlook cannot find the address, the name will not have an underline at all.

Another way to locate a person’s email address is to click the **To** button and search for the name. By default, Outlook will search in the Global Address List. To search in your Contacts, click the drop-down arrow next to the Global Address List and choose Contacts, which is listed under the Outlook Address Book.

1. Type the subject of the e-mail in the **Subject** field. If you don’t type a subject, Outlook will warn you of this upon sending the message.
2. Click inside the body area of the message window and type your message.
3. To send the message, click **Send**.
Creating/Inserting a Signature

A signature is a file that appears at the bottom of all your outgoing messages identifying you by your name, title, address, phone number, etc. Other things that you can include in your signature file are pictures, logos, website links, or even a confidentiality disclaimer.

Create a signature

1. In the main Outlook window, select Tools → Options from the menu. The Options dialog box appears.
2. Click the Mail Format tab and click Signatures. The Signatures and Stationery dialog box appears. Here you can create new signatures and manage existing ones.
3. Click New, enter a name for the signature, (e.g., My Signature), then click OK.
4. In the Edit signature field, type the text that you want to appear in the signature. Then, format the signature as desired.
5. Insert pictures or hyperlinks, if desired.
6. Click Save.
7. On the right side of the box, under Choose Default Signature, choose your new signature as the default for all New Messages and Replies/Forwards.
8. Click OK.

The next time you create a new message, your signature will appear.

Tip: You can create more than one signature in Microsoft Outlook. For example, you might want to use one signature for professional correspondence and another for personal.

Figure 2-2: The Signatures and Stationery dialog box.
Attaching Files to a Message
One of the most useful features of e-mail is the ability to attach one or more files to a message. You can attach pictures, documents, PDFs and more in Outlook.

1. In the Message window, click the **Attach File** button in the Include group. The Insert File dialog box appears.

2. Navigate to and select the file you want to insert, and then click **Insert**. The selected file is attached to the message.

Attaching Items to a Message
You can also attach other items, such as emails, calendars, and contacts to a message.

1. In the Message window, click **Attach Item** button in the Include group. The Insert Item dialog box appears.

2. To attach email messages, go to the folder where those messages are saved (Inbox, Sent Items, etc.) and hold down the Ctrl key to select more than one.

3. Click **OK**.

4. To select other messages, click **Attach Item** again and select other messages from the appropriate folders.

Inserting Calendars into a Message
If you are trying to schedule a meeting with someone off campus or someone not yet on Exchange, you can insert a snapshot of your calendar into an email for them to view.

1. In the Message window, click **Calendar** button in the Include group. The Send a Calendar via email dialog box appears.

2. Select the date range and whether or not you want it to include your working hours only.

3. Click **OK**.

4. A snapshot of your calendar will insert into the email.
Specifying Message Options

Request a read or delivery receipt
If you feel like your messages are being ignored, try requesting a read receipt. That way, you can track when a recipient receives and reads the message.

⚠️ Trap: Read receipts only work if your recipient’s e-mail program supports them.

1. In the Message window, click the Options tab on the Ribbon.
2. In the Tracking group, select Request a Delivery Receipt and/or Request a Read Receipt.
   - Request a Delivery Receipt: Sends you a notification when the message has been successfully delivered.
   - Request a Read Receipt: Sends you a notification when the recipient has opened the message.

💡 Tip: Don’t rely too heavily on read receipts; your recipients have the option to deny them.

🌟 Other Ways to Request Receipts: Click the Options tab on the Ribbon and click the Dialog Box Launcher in the Tracking group. Under Voting and Tracking options, select Request a delivery receipt for this message, Select a read receipt for this message, or both. Click Close.

Other Options
You might have noticed a variety of other message options on the Ribbon or in the Message Options dialog box.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sensitivity</td>
<td>Displays a tag indicating how the recipient should treat the message.</td>
</tr>
<tr>
<td>Security Settings</td>
<td>Encodes the message so it is not readable by anyone except the intended recipient(s).</td>
</tr>
<tr>
<td>Have replies sent to</td>
<td>Sends all replies to the message to someone else, such as an assistant.</td>
</tr>
<tr>
<td>Do not deliver before</td>
<td>Waits to send the message until the date and time you specify.</td>
</tr>
<tr>
<td>Expires after</td>
<td>Makes the message unavailable after a specified date and time.</td>
</tr>
</tbody>
</table>
Recalling a Message

Recall a message
Sometimes you might forget to attach a file to a message, or accidentally send a message to the wrong person(s). When this happens, you can recall the message – provided the following conditions are met:

- The recipient has not opened the message
- You and the recipient use Microsoft Exchange

1. In the main Outlook window, click the Mail button in the Navigation pane. The Mail pane appears.
2. Click the Sent Items folder in the Mail pane and double-click the message that you want to recall. The message opens in its own window.
3. On the Ribbon, click the Other Actions button in the Actions group and select Recall This Message. The Recall This Message dialog box appears.
4. Specify your options and click OK. The message is recalled.
5. If you chose to replace the recalled message with a new message, make your edits as necessary and click Send. The recalled message appears.
6. Click the Close button to close the recalled message.

To see if your recall was successful, check your Inbox for a notification.
Saving Unfinished Messages (Drafts)
If you get interrupted while composing an e-mail message, all is not lost; you can save the unfinished message and return to it later.

Save an unfinished message
- Click the Office Button and select Save from the menu.
  - Outlook saves the unfinished message to the Drafts folder.
  - Other Ways to Save a Message: Click the Save button on the Quick Access Toolbar.

Open a saved message
It’s easy to return to an unfinished message.

1. In the main Outlook window, click the Mail button in the Navigation Pane.
2. Click the Drafts folder. A list of unfinished messages appears.
3. Double-click the message you want to finish.

The message opens in its own window, exactly how you left it.
Using the Out of Office Assistant
If you know that you’re going to be out of the office for a few days, it’s a good idea to set up the Out of Office Assistant. The Out of Office Assistant sends an automatic response to any messages you receive while you’re away.

1. In the main Outlook window, select Tools → Out of Office Assistant from the menu. The Out of Office Assistant dialog box appears.

2. Click the Send Out of Office auto-replies option and specify a start and stop time, if desired. Now you need to enter the text that will appear in your auto-reply.

3. On the Inside My Organization and/or Outside My Organization tab(s), type your auto-reply.

On the Outside My Organization tab, you may only want to have automatic replies sent to those in your Contacts to prevent messages going to spammers.

4. Click OK.

You can use the Out of Office Assistant to send a different reply to those inside your organization than those outside your organization.
Now that you know how to compose and send e-mail messages, you need to know how to receive and sort them.

In this chapter, we’ll show you how to receive messages from your e-mail server and what to do with those messages once they appear in your Inbox. For example, you can reply to a message, forward a message on to someone else; flag a message for later follow-up, and more.
Reading E-mail

Any new, unread messages appear in **bold** and have a closed envelope icon (메일) next to them. To view a message in the Reading pane, click the message. To view a message in its own window, double-click the message.

- You can view messages safely in the Reading pane; potentially malicious scripts or attachments are not activated or opened automatically.
  - All messages have one or more icons to indicate their status, importance, and contents.
  - By default, Outlook is configured to block external content, such as links to pictures or sounds, in HTML messages that you receive. To unblock content, click the notification area in the Reading pane and select **Download Pictures**.

Tips

Deleting E-Mail

E-mail may be deleted in the list view using **DELETE** or the open e-mail message itself using the **X** icon. There are two deletion methods: a simple delete and a permanent delete.

Simple vs. Permanent Delete

A **simple delete** will move the e-mail message to the Deleted Items folder. The message will then need to be deleted again to remove it from your mailbox. The message will remain in a recoverable storage area for up to 30 days before being removed completely from the e-mail system.

A **permanent delete** <Shift>+<DELETE> will automatically remove the message from the system completely. It skips the Deleted Items folder and does not store the message in the recovery storage area.
Opening/Saving Attachments
Whenever you see a paper clip icon (_attach) next to a message, the message contains an attachment. This lesson will show you how to preview, open, and save an attachment.

Open an attachment
To open an attachment, double-click it.

1. Click the Mail button in the Navigation pane and double-click the message containing the attachment. The message opens in its own window.
2. Double-click the attachment that you want to open. The Opening Mail Attachment dialog box appears, reminding you that you should only open files from a trustworthy source. If you trust the sender of the attachment, continue to the next step.
3. Click Open.

Other Ways to Open an Attachment:
In the Inbox, click the message containing the attachment that you want to open. Then, double-click the attachment in the Reading pane.

Save an attachment
If you’re going to be making changes to an attachment, you’ll need to save it to your computer first.

1. Double-click the attachment that you want to save. The Opening Mail Attachment dialog box appears.
2. Click Save. The Save As dialog box appears.
3. Enter a new name for the file, if necessary, and specify where you want to save the file.
4. Click Save.

Other Ways to Save an Attachment:
In the Inbox, click the message containing the attachment that you want to save. Right-click the attachment in the Reading pane and select Save As from the contextual menu.

Save multiple attachments
If you receive an email with many attachments (including pictures), you can save them all at once.

1. Click the email with the attachments.
2. Click File and select Save Attachments, then All Attachments.
3. The Save All Attachments window opens. Click OK.
4. Select the folder where you want to save the files and click OK.
Flagging a Message for Follow-up

Flagging a message is an easy way to remind you to follow up on an important e-mail or task. When you flag an item, a small (📍) icon appears next to the message, and a copy of the message is added to your To-Do List.

Flag a message

Flagging a message is extremely easy.

1. Click the **Mail** button in the Navigation pane. The Inbox appears.
2. Click the **Flag** area of the message you want to flag.

The default flag—the Today flag—is applied to the message, and a copy of the message is added to your To-Do List.

**Other Ways to Flag a Message:**
Select the message you want to flag, click the **Follow Up** button on the Standard toolbar, and select a flag from the list.

Change flags

The default flag is the Today flag, but there are several others for you to choose from.

1. Click the message containing the flag you wish to change and click the **Follow Up** button on the Standard toolbar. A list of flags appears.
2. Select a flag from the list.

The selected flag is applied to the message.

**Other Ways to Change Flags:**
Right-click the flag you wish to change and select a new flag from the contextual menu.

Set a reminder date

You can add a reminder date to a flagged message so that Outlook reminds you to follow-up on the message when the specified date arrives.

1. Right-click the flag you want to add a reminder date to and select **Add Reminder** from the contextual menu.

The Custom dialog box appears. Here you can set a reminder date, change the purpose of the flag, or set a start and end date for the flag.
1. Click the **Reminder Date** list arrow, and select a date from the Calendar.

2. Click **OK**.

   Outlook will send you a reminder to follow-up on the message when the specified date arrives.

**Remove a flag**

Once you’ve followed-up on a flagged message, you can remove the flag or mark it as “Complete”.

1. Right-click the flag you want to remove.

2. Select **Mark Complete** or **Clear Flag** from the contextual menu.

   Depending on the option you selected, the Flag is either replaced by a checkmark (✓) or removed altogether.

**Other Ways to Mark a Flag “Complete”:**

- Click the flag.

**Tips**

- You can also control message flags from inside the Message window. To do so, click the **Follow Up** button in the Options group and select an option from the menu.

- You can also flag contacts and tasks.

- Unlike the Flag for Follow Up feature in Outlook 2003, you **cannot** color-code flags in Outlook 2007.
Using Color Categories
Color categories let you organize your Outlook items into specific groups, making the information they contain easier to distinguish. You can choose from a set of default categories, or you can even create your own.

Assign a color category
By default, you have eight color categories to choose from.

1. Click the Mail button in the Navigation pane. The Inbox appears.
2. Click the message you wish to categorize and click the Categorize button on the Standard toolbar. A list of categories appears.
3. Select a category from the list.

The selected category is applied to the message.

Tip: You can assign multiple categories to a message.

Other Ways to Categorize a Message:
Right-click the message you want to categorize, select Categorize from the contextual menu, and select a category from the list.

Clear a category
If you decide you don’t want to categorize a message after all, you can clear the category.

- Right-click the category you wish to clear and select Clear All Categories from the contextual menu.

Rename a category
You can rename Outlook’s color categories to meet your needs.

1. Click the Mail button in the Navigation pane. The Inbox appears.
2. Click the Categorize button on the Standard toolbar and select All Categories. The Color Categories dialog box appears.
3. Click the color category you wish to rename, and click Rename.
4. Type a new name for the category, and click OK when you’re finished.
Create a new category
If none of Outlook's default categories meet your standards, you can create your own from scratch.

1. Click the **Mail** button in the Navigation pane. The Inbox appears.
2. Click the **Categorize** button on the Standard toolbar and select **All Categories**. The Color Categories dialog box appears.
3. Click **New**. The Add New Category dialog box appears. Here you can give the category a name, assign a new color to the category, or create a keystroke shortcut for the category.
4. Type a new name for the category, specify any other options as necessary, and click **OK**.

The new category is added to the list of categories.

Change the Quick Click category
You can also change the Quick Click category, or the category that appears by default when you click the Category area of a message.

1. Click the **Mail** button in the Navigation pane. The Inbox appears.
2. Click the **Categorize** button on the Standard toolbar and select **Set Quick Click**. The Set Quick Click dialog box appears.
3. Click the **Category** button and select the category you want to appear by default.
4. Click **OK**.

Now every time you click the Category area of a message, the selected category will be assigned to the message by default.

**Tips**

- You can also control color categories from inside the Message window. To do so, click the **Categorize** button in the Options group and select an option from the menu.
Sorting Messages
When your Inbox is jam-packed with messages, it can be difficult to find what you’re looking for. When this happens, try sorting your messages using Outlook’s arrangement options. You can sort your messages by the date they were sent, who sent them, and more.

1. Click the Mail button in the Navigation pane. The Inbox appears.
2. Select View → Arranged By from the menu. A list of available arrangement options appears. See Table 3-1: Arrangement Options for a description of each option.

1. Select an arrangement from the list.

Other Ways to Sort Messages: In the Inbox, click Arranged By and select an option from the list.

<table>
<thead>
<tr>
<th>Arrangement</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Arranges messages by date, starting with today.</td>
</tr>
<tr>
<td>Conversation</td>
<td>Arranges messages by conversation topic.</td>
</tr>
<tr>
<td>From</td>
<td>Arranges messages by sender.</td>
</tr>
<tr>
<td>To</td>
<td>Arranges messages by recipient.</td>
</tr>
<tr>
<td>Categories</td>
<td>Arranges messages by assigned categories.</td>
</tr>
<tr>
<td>Flag: Start Date</td>
<td>Arranges flagged messages by their start date.</td>
</tr>
<tr>
<td>Flag: Due Date</td>
<td>Arranges flagged messages by their due date.</td>
</tr>
<tr>
<td>Size</td>
<td>Arranges messages by size, largest to smallest.</td>
</tr>
<tr>
<td>Subject</td>
<td>Arranges messages alphabetically by subject.</td>
</tr>
<tr>
<td>Type</td>
<td>Arranges messages by type.</td>
</tr>
<tr>
<td>Attachments</td>
<td>Arranges messages by whether or not they have an attachment.</td>
</tr>
<tr>
<td>E-mail Account</td>
<td>Arranges messages by e-mail account.</td>
</tr>
<tr>
<td>Importance</td>
<td>Arranges messages by importance.</td>
</tr>
</tbody>
</table>
Changing Views

There are a variety of different ways to view the messages in your Inbox. For example, you could choose to only display messages that haven’t been read, or view your messages on a timeline. This lesson shows you how.

1. Click the Mail button in the Navigation pane.
2. Select View → Current View from the menu. A list of available views appears.
3. Select a view from the list. Other Ways to Change Views: In the main Outlook window, select Tools → Organize from the menu. Click Using Views and select a view from the list.
4. You can also change the view of a folder by clicking View and selecting Arrange By, then selecting the column that you want to sort by. To remove groupings, uncheck the Show in Groups options on that menu.

<table>
<thead>
<tr>
<th>Messages</th>
<th>The default view in Outlook. Displays the Navigation, Mail and Reading panes.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Messages with Auto Preview</td>
<td>Displays the first three lines of any unread messages.</td>
</tr>
<tr>
<td>Last Seven Days</td>
<td>Only displays messages from the past seven days.</td>
</tr>
<tr>
<td>Unread Messages in This Folder</td>
<td>Only displays messages that haven’t been read.</td>
</tr>
<tr>
<td>Sent To</td>
<td>Displays the recipient(s) of each message in the Mail pane.</td>
</tr>
<tr>
<td>Message Timeline</td>
<td>Displays the messages in your Inbox on a timeline.</td>
</tr>
</tbody>
</table>
When you work at your desk for a while, papers and files can pile up into a mess. The same thing happens after you’ve worked with Outlook for a while—your e-mails becoming disorganized and harder to find.

In this chapter, you’ll learn how to take control and organize your Outlook information. You’ll learn how to search for items, manage data in folders, and create rules that automatically manage your e-mails.
Using Instant Search

The Instant Search feature, which is new to Microsoft Office Outlook 2007, helps you find messages and other types of items in Outlook. Although you’re most likely to use it to search for e-mail messages, the Instant Search feature is accessible in Mail, Calendar, Contacts, Tasks, Notes, Folder List, and Journal as well.

Enable Instant Search

Before you can use the full capabilities of Instant Search, you may need to download the software from Microsoft’s Web site.

Tip: If you are running the Windows Vista operating system, Instant Search is already enabled as part of Vista’s Windows Desktop Search feature.

1. Start the Outlook 2007 program.
   
   If Instant Search isn’t already enabled, a dialog box appears that prompts you to download the Instant Search software.

Tip: You need to be connected to the Internet to download Microsoft’s Instant Search software.

2. Follow the instructions in the dialog box to download and install Instant Search.

Find a message or item

Instant Search is very easy to use. Simply enter keywords into the Instant Search box to find messages or other Outlook items that contain those keywords.

1. Enter search text in the Instant Search box.
   
   It isn’t necessary to click the Search button to start searching—items that contain the text you entered automatically appear in the Search Results pane with the search text highlighted.

Tip: If you are searching your Inbox folder in Mail, for example, message items will appear in the search results, but if you are searching the Calendar, calendar items like appointments will appear.

You can also clear a search and start over.

Click the Clear Search button.

Other Ways to Find an Item: Click Tools on the menu bar, point to Instant Search, and select Advanced Find. Enter the information you want to find in the Advanced Find dialog box.
Use recent searches
Outlook keeps track of recent searches you’ve performed so you can use them again.

- Click the **Show Instant Search Pane Menu** arrow, point to **Recent Searches**, and select recent search keywords from the list. Outlook searches for the keywords and returns the results.

Refining a Search
You can expand or refine a search to produce additional or fewer results, and you can also customize the way the search function works.

Expand a search
By default, only the selected folder is searched when you use Instant Search, but you can easily expand your search to additional folders.

- After performing a search of the Inbox, click the **Try searching again in All Mail Items** hyperlink (located at the end of the results) to expand your search to all Mail folders.

**Other Ways to Expand a Search:** Click the **Show Instant Search Pane Menu** arrow and select **Search All Mail Items**.

Refine a search
You can simply enter more keywords to narrow your search results within a folder, but with the Query Builder you can also add search criteria that more precisely narrow the scope of your results.

1. Click the **Expand the Query Builder** arrow next to the Instant Search box. Different boxes such as From, Body, Subject, and To appear.
2. Enter the terms you want to search for in each of the areas.

   You can access additional search criteria by clicking the Add Criteria button and selecting the criteria.

   You can once again minimize the Query Builder when you’re done using it.

3. Click the **Minimize the Query Builder** arrow.

Change search options
- Click the **Show Instant Search Pane Menu** arrow and select **Search Options**.

The Search Options dialog box appears. Here you can select or deselect options related to how items are indexed for search, how results are shown and highlighted, and which folders are searched by default.
Creating and Using Folders

Outlook normally saves all your e-mail messages in the Inbox folder, but sooner or later you may need to expand your horizons and create your own folders to help organize your e-mail messages and other Outlook items more effectively.

This lesson will show you how to create a new folder for storing and organizing your Outlook items.

Create a new folder

1. Click the **New** button arrow on the Standard toolbar and select **Folder**.

   The Create New Folder dialog box appears.

   **Other Ways to Open the Create New Folder Dialog Box:** Right-click in the Folder List and select **New Folder**.

2. Type a name for the folder in the Name box.

3. Click the **Folder contains** list arrow and select the type of item the new folder will contain.

   For example, you would select Mail and Post Items if you were creating a new folder to hold e-mail messages.

   Next, you need to decide whether you want the folder to be a subfolder of another folder or not.

4. Select a folder in the “Select where to place the folder” list and click **OK**.

   The new folder appears as a subfolder within the folder you selected.

   **Tips**

   ✓ If you want the new folder to be on the same level as your other folders, make sure you select the Mailbox folder at the top of the list when you’re creating the new folder.

Move messages between folders

Once you set up the folders you want, you can organize your messages by moving them into the desired folders.

1. Select the folder in the Folder List that contains the message(s) you want to move.

   **Tip:** To move multiple messages at once, press and hold the `<Ctrl>` key while you select the messages.
2. Click and drag the message(s) to a different folder in the Folder List.

**Other Ways to Move Messages Between Folders:**
Right-click the message(s) you want to move and select Move to Folder. Select the destination folder in the Move Items dialog box and click OK.

**Managing Folders**
You can reorganize your folders by renaming them, moving them, and even deleting them.

**Tips**
- To rename, move, or delete a folder, you need to first display either the Folder List or the Mail pane.
- If a folder in the folder list has subfolders, it will have a plus symbol next to it. Click the plus symbol to expand the folder and view the subfolders. Click the minus symbol to collapse them again.

**Rename a folder**
1. Right-click the folder and select Rename from the contextual menu.
2. Enter a new name and press <Enter>.

**Move a folder**
- Click and drag the folder to the desired location.
  
  If you drag a folder into another folder, it becomes a subfolder of that folder.

  **Tip:** If multiple folders are at the same folder level in the folder list, they are arranged alphabetically.

**Delete a folder**
1. Right-click the folder you want to delete in the Folder List and select Delete “folder name”.

  A warning message appears, asking if you’re sure you want to delete the folder.
Creating a Rule

A rule is a very powerful tool that helps you manage your e-mail messages by automatically performing specific actions. When you create a rule, Outlook takes the action specified in the rule when a message arrives in your Inbox or when you send a message. You can use rules too automatically:

1. **Organize your messages**: For example, move all incoming messages that have the word “Picnic” in the Subject box to a Picnic folder.

2. **Create a notification**: Play a certain sound when you receive an e-mail from your boss. You get the idea. There are a couple different ways to create a rule:
   2.1. **By example**: Create a rule based on an e-mail message. Simply select the message that contains the sender, subject, or recipient you want to use in the rule, and then click the Rule button on the toolbar.

   2.1.2. **Using the Rules Wizard**: You can create a rule based on a template from the Stay Organized or Stay Up to Date collections of templates. Or, you can start with a blank rule and let Outlook walk you through the entire process of creating a rule using all your own conditions and actions.

First let’s look at the easiest way to create a rule—by example.

**Create a rule by example**

You can use an existing message to create a rule.

1. Select the message you want to base the rule on and click the Create Rule button on the Standard toolbar.

   The Create Rule dialog box appears.

   ![Create Rule dialog box](image)

   **Other Ways to Display the Create Rule Dialog Box:** Right-click the message you want to base the rule on and select Create Rule from the contextual menu.

2. Select condition(s) for the rule.

   Choose From, Subject, or Sent to conditions. The rule will only apply when you receive e-mail that satisfies all the conditions you select.

3. Specify the action you want to take if the condition(s) are met.

   Choose from displaying an alert, playing a selected sound, or automatically moving the item to a specified folder.

   **Tip**: Click the Advanced Options button for even more condition and action options.

4. Click **OK**.

   Outlook asks you to confirm the creation of the new rule.

   **Tip**: If you want to apply the rule to messages you’ve already received, click the Run this rule now on messages already in the current folder check box.

5. Click **OK**.

   The rule is active.
Creating a Rule with the Rules Wizard

The Rules Wizard can help you create a rule from a template or by starting with a blank rule.

1. In Mail, select **Tools → Rules and Alerts** from the menu. The Rules and Alerts dialog box appears, displaying the E-mail Rules tab.
2. Click the **New Rule** button.

The Rules Wizard dialog box appears. The Rules Wizard takes you through several steps to help you establish your new rule.

First you will see “Step 1: Select a template”. Here you can choose from templates in the Stay Organized or Stay Up to Date sections, or create a rule from scratch by selecting an option in the “Start from a blank rule” section.

3. Select a template or blank rule option and click **Next**. Now you need to select which conditions you want to use.
4. Select the condition(s) you want to check. You may also need to edit rule descriptions in the “Step 2: Edit the rule description” area at the bottom of the dialog box. For example, if the rule is going to play a sound, you need to select which sound to use.
5. If necessary, click the underlined values at the bottom of the dialog box and edit the rule descriptions. When you’re finished, click **Next** in the Rules Wizard dialog box. Next you need to specify what you want to do with the messages that meet the specified conditions.
6. Select the actions you want Outlook to perform. If necessary, define the actions at the bottom of the dialog box. Click **Next** when you’re finished.
7. Specify any exceptions to the condition(s). If necessary, define the exceptions in the bottom of the dialog box. Click **Next** when you’re finished.
8. Enter a name for the new rule and click **Finish**.

**Tip:** If you want the new rule to be applied to messages already in the folder, select that option before you click **Finish**.
Outlook’s Contacts list is a “technological Rolodex” database that keeps track of names, addresses, phone numbers, and lots of other information. Once you have entered a person’s name and details into Outlook, the possibilities are endless. You can instantly find, e-mail or print contact information, or even create a map to a contact’s business or home address.
Managing Contacts

Adding a Contact

The Contacts list contains information about people and organizations you interact with. The Contacts list lets you enter as much or as little information about your contacts as you want, such as their names, phone numbers, and addresses. You can then use the information in the Contacts list with the other Outlook tools.

For example, with a few clicks of the mouse, you can send an e-mail to a contact or schedule an appointment with him or her. You can even use the Contacts list with other programs. For example, you could store all the information in your Contacts list on a Palm organizer.

Tips

✓ By default, contacts appear in Outlook in Business Cards view. In this view, your contacts are displayed as Electronic Business Cards, which look like actual paper business cards on the screen.

1. Click the Contacts button in the Navigation pane. Outlook displays the Contacts list. Here you can see your contacts.
2. Click the New Contact button on the Standard toolbar.

   The Untitled – Contact window appears. It’s up to you how much information you enter about a contact. You can enter the contact’s name, company, job title, e-mail address, Web page address, phone numbers and addresses.

   Tip:

   To add a picture of a contact, click the Add Contact Picture button (located next to the Name and Company fields).

3. Enter as much contact information as you want in the window.

   Tip:

   Several of the fields in the Contact item window have buttons and list arrows next to them. The buttons display dialog boxes to assist you with the fields, while the arrows are used if a contact has more than one phone number, e-mail account, or address.

4. Click the Save & Close button in the Actions group.

   The Contact window closes and the new contact appears in the contacts list.
Adding an E-mail Sender to Your Contacts

You may receive an e-mail message from someone who you want to add to your Contacts list. To add an e-mail sender’s name and e-mail address to your Contacts list, simply drag the e-mail to the Contacts button in the Navigation Pane. Outlook will add the sender’s name and e-mail address to the Contacts list—and you can add any additional information yourself.

1. Click the Mail button in the Navigation Pane. The Inbox appears.

2. Click and drag an e-mail from the person you want to add to the Contacts list to the Contacts button in the Navigation Pane.

   The Contact window opens and the person’s name and e-mail address are filled in automatically.

   Other Ways to Add an E-mail Sender to the Contacts List:
   Open an e-mail message (or just view it in the Preview pane), right-click the name in the From line, and select Add to Outlook Contacts from the contextual menu.

3. Enter any additional information for the contact.

4. Click the Save & Close button in the Actions group.

   The Contact window closes. If you look in Contacts, the new contact now appears.
Editing and Deleting Contacts

It’s easy to view and change information about your contacts. You can edit contact information by double-clicking a contact to open it in the Contact window, or you can edit information about a contact directly in the Contacts list. The latter method is more efficient; simply select the entry you wish to edit and make your changes.

Edit a contact

1. Click the **Contacts** button in the Navigation pane. Outlook displays the Contacts list.
2. Double-click the contact you want to edit in the Contacts list. That person’s contact window appears.
3. Make the necessary changes.
4. Click the **Save and Close** button in the Actions group.

The window closes and the changes to the contact's information are saved.

**Other Ways to Edit a Contact:**
- If you are using a view other than Business Cards, or have the Reading Pane displayed, modify the information right there, without opening the Contact window.

**Tip:** You can also attach files or other Outlook items to contact records. Open a contact’s window, click the **Insert** tab on the Ribbon and click the **Attach File** or **Attach Item** button in the Include group.

Delete a contact

You can also delete contacts if you no longer need them.

- Select a contact in the Contacts list and click the **Delete** button on the Standard toolbar.

The contact is moved to the Deleted Items folder in your Mailbox.

**Other Ways to Delete a Contact:** Select the contact and press the **<Delete>** key.
Changing Contact Views

Outlook is flexible enough to keep all of your contacts in one place, yet display them differently depending on the type of work you're doing. By default, contacts appear in Outlook in Business Cards view. In this view, your contacts are displayed as Electronic Business Cards, which look like actual paper business cards on the screen.

But, like other folders in Outlook, the Contacts list has several different ways to look at the same information. These different views are very useful when it comes to organizing the Contacts list. You can use these views to:

- Display more detailed information about each contact with fewer contacts on the screen at once (Address Cards and Detailed Address Cards).
- Display more contacts on the screen at once with less detailed information about each contact (Phone List).
- Organize and sort your contacts by their category, company, or location (By Category, By Company, or By Location).

In this lesson, you will learn how to utilize Outlook’s views to help you sort and organize the Contacts list.

1. Click the **Contacts** button in the Navigation pane.
   
   Outlook displays the Contacts list.

2. Select the view you want to use from the Current View menu, located in the Navigation Pane.

**Other Ways to Change Contact Views:** Display the Contacts list, click the **View** menu on the Standard toolbar, point to **Current View**, and select a view from the submenu.

<table>
<thead>
<tr>
<th>Business Cards</th>
<th>Displays contacts as traditional business cards. This is the default view for the Contacts list.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Cards</td>
<td>Displays contacts on individual cards with one mailing address and business and home phone numbers.</td>
</tr>
<tr>
<td>Detailed Address Cards</td>
<td>This is the most detailed view of the Contacts list. Everything is displayed on individual cards: business and home addresses, phone numbers, and any other information.</td>
</tr>
<tr>
<td>Phone List</td>
<td>Displays contacts in a list with company name, business phone number, business fax number, and home phone number. Phone List View displays more contacts on the screen at a time but has less detailed information.</td>
</tr>
<tr>
<td>By Category</td>
<td>Displays your contacts in a table and organizes and sorts contacts by color category (if categories have been assigned to contacts).</td>
</tr>
<tr>
<td>By Company</td>
<td>Displays your contacts in a table and organizes and sorts contacts by company.</td>
</tr>
<tr>
<td>By Location</td>
<td>Displays your contacts in a table and organizes and sorts contacts by country and state.</td>
</tr>
<tr>
<td>Outlook Data Files</td>
<td>Displays your contacts in a table and sorts them alphabetically.</td>
</tr>
</tbody>
</table>
Working with Distribution List

A distribution list, sometimes called a group, is an Address Book entry comprised of several names from the Address Book. You use distribution lists to send an e-mail message to every member of the group in a single mailing. You can use distribution lists to quickly send e-mails to:

- All employees in the same department or organization
- Members on the same project or committee
- A group of friends

Distribution lists show up as items in your Address Book and Contacts list the same way that a person’s name does. To address an e-mail message using a distribution list, follow the same procedures that you would with any other message.

In this lesson, you will learn how to create a distribution list that you can use to send e-mails to multiple recipients.

Create a distribution list

Before you can send e-mails to recipients in a distribution list, you need to create the list.

1. Click the **New** button list arrow on the Standard toolbar and select **Distribution List**. The Untitled – Distribution List window appears.
2. Enter a name for the distribution list in the **Name** field.
   
   For example, you could call the distribution list “Family” or “Management Team”.

   Now you’re ready to choose which recipients you want to include in the distribution list.

3. Click the **Select Members** button in the Members group on the Ribbon.

   The Select Members dialog box appears, giving you access to all of the contacts in your address book.

4. Find and double-click the names of recipients you want to add to the distribution list.
   
   As you add recipients, their names appear in the Members field at the bottom of the dialog box.

   **Tip:** To search for recipients in different address books—for example, the Contacts folder—click the **Address Book** list arrow at the top of the Select Members dialog box and select the desired address book.

   **Other Ways to Add Recipients:**

   Select the name of the recipient, and then click the **Members** button at the bottom of the Select Members dialog box.

5. Click **OK** when you’re finished. You return to the Distribution List window. The name you entered for the distribution list now appears in the title bar and the names of the recipients are listed in the window.

6. Click the **Save & Close** button in the Actions group on the Ribbon.

   The window closes and the new distribution list is saved.
Send an e-mail using a distribution list

Once you have created a distribution list, it's easy to send a mass e-mail to the group's recipients. The process for sending an e-mail to a distribution list is the same as it is for a single recipient.

1. Click the **New** button on the Standard toolbar. A new message window appears.
2. Click the **To** button. The Select Names dialog box appears.
3. Select the name of the distribution list you want to use, click the **To** button and click **OK**.

You return to the message window.

**Tip:** If your distribution list is rather large, or if you'd like to keep everyone's name and e-mail address private, enter the distribution list into the Bcc field instead of the To field.

4. Type your message text and click the **Send** button once you're ready to send it.
   All the recipients on the distribution list will receive the same e-mail from you.