Outlook 2007 Quick Reference: Intermediate

New mail message

Adding importance

1. Select **New > Mail Message**. Click the **Message** tab on the Ribbon.
2. Click the **High Importance** button or the **Low Importance** button – you can click the buttons again to turn off the importance setting, returning the message to a normal importance.

Creating an AutoSignature

1. Select **New > Mail Message**. On the **Message** tab click the **Signature** button and select **Signatures**.
2. Click **New** and name your signature.
3. Enter your signature text in the **Edit Signature** box, change any formatting, and then click **OK**.

Note: When you create your first signature, Outlook sets that to be your default signature and applies it to all new messages automatically.

Using an AutoSignature

Select **New > Mail Message** – the AutoSignature you created appears.

Receiving email

Reading messages

1. Click a message to display it in the ***Reading pane***
   Or
2. Double-Click the message to display it in its own window.

Adding in-line comments to an email reply

1. Select **Tools > Options**.
2. Click the **Preferences** tab and then the **E-mail Options** button.
3. Check **Mark my comments with** and then type your identifier in the box below.
4. Click **OK** twice.

Delegate permissions (a.k.a proxy rights)

Granting permission for access to Outlook items

1. Select **Tools > Options**.
2. Click the **Delegates** tab, and then the **Add...** button. Search for the Individual. Double-click their name and click **OK**.
3. Select the person's name and click the **Permissions...** button. For each item, select a permission level: **None**, **Reviewer** (read-only), **Author** (read, create) or **Editor** (read, create, modify).
4. To grant visibility to private items: Select the checkbox for **Delegate can see my private items**.

Respond to a meeting request on behalf of someone

- Performed by the owner of the account being responded on behalf of.
  1. Click **Tools > Options > Delegates** and click the **Add…** button.
  2. Search for the person to whom you're giving permissions, double-click their name, and click **OK**.
  3. Select one of the following permissions:
     - **My delegates only but send a copy…** Meeting items go to delegates and a copy to owner.
     - **My delegates only**. Meeting items go to delegates only.
     - **My delegates and me**. Meeting items will go to both delegate and owner.

Accessing other people's Outlook items

1. Select **File > Open > Other User's Folder**.
2. Type the co-worker's name in the **Open Other User's Folder** window.
3. Click the **Folder type** arrow, and select a folder; then click **OK**.
4. Click **Yes** and **Send** the access request message to the co-worker.

Email techniques

Recalling a sent message

Note: you can't recall GroupWise appointments that were sent before the migration.

1. Open the message in a message window.
2. Select **Other Actions** and **Recall This Message**.
3. Choose the appropriate settings and click **OK**.

Saving a message draft

1. Select **New > Mail Message**.
2. Click the **Save** button on the **Quick Access Toolbar** or click the **Office Button** and select **Save**.

Searching

Using instant search

1. Select the folder you wish to search.
2. Enter your search criteria in the **Instant Search** box. 
3. Click the **Clear Search** button to clear the search results.

Search all calendar Items

1. Click **Calendar** in the Navigation Pane.
2. Select **View > Current View > All Appointments**.
4. In the Instant Search field type your search criteria.

Search options: change to show results from all folders

1. Click **Tools > Instant Search > Search Options...** and in the Instant Search Pane select **All Folders** and click **OK**.

Categorize Outlook items

Add or modify color categories

1. Click the **Categorize** button  on the toolbar.
2. Select an existing category and click **Rename** or use the **New** button to create a new category.
3. Make changes and click **OK**.

Assign a color category

1. Select the messages you wish to categorize.
2. Right-click and select **Categorize**.

Setting the Quick Click category

1. Click the **Categorize** button and choose **Set Quick Click**.
2. Select a category (or create a new one).
3. Click **OK** to assign the quick click category.

Flagging Messages

Sending a message – remind yourself

1. On a new message, click the **Follow-up** button on the **Message** tab.
2. Select a follow-up such as **Next Week**.
3. Click the **Follow-up** button again and select **Add Reminder**.
4. Change the reminder details and click **OK**.

Sending a reminder to message recipients

1. On a new message, click the **Follow-up** button on the **Message** tab.
2. Select **Flag for Recipients**.
3. Enter the appropriate flag and reminder information.
4. Click **OK** and then send the message.

Using a Quick Click flag

1. From the main Outlook window, click the **Follow-Up** button on the Outlook toolbar and select **Set Quick Click**.
2. Specify your preferred follow-up such as **Next Week** and click **OK**.
3. Use the **Flag Status** column to assign the Quick Click follow-up flag for the selected message(s).

Working with rules using the wizard

Create a new rule

Select the template

1. Select **Tools > Rules and Alerts**.
2. Click the **New Rule...** button to access the **Rules Wizard** window.
3. Select an option from the **Stay Organized** or **Stay Up-to-Date** lists and then click **Next**.

Select the condition

1. In the **Rules Wizard** window, make a choice from the **Select condition(s)** box.
2. Use the **Edit the rule description** box, click each of the underlined descriptions and change them to settings of your choice and then click **Next**.

Select the action

1. In the **Rules Wizard** window, make a choice from the **Select action(s)** box.
2. Use the **Edit the rule description** box, Click each of the underlined descriptions and change them to settings of your choice.
3. Click the **[Next]** button to proceed.

Select exceptions

1. In the **Rules Wizard** dialog box, make a choice from the **Select exception(s)** box.
2. Use the **Edit the rule description** box, Click each of the underlined descriptions and change them to settings of your choice.
3. Click the **[Next]** button to proceed.

Naming and reviewing rules

1. In the **Rules Wizard** dialog box, enter a name for the rule.
2. Specify any rule options.
3. Review your rule and make changes if necessary and click **OK**.

Working with the calendar

Move to specific dates

- Use the buttons above the calendar to move through days and months; or
- Select **Go** > **Go to Date**, type the date, and click **OK**.

Change the calendar view

1. Select the calendar you wish to work with from the My Calendars list in the upper left.
2. Click **View > Current View** and select an appropriate option.

Create a new calendar

1. Select **File** > **New** > **Folder**.
2. Type a name and click the location for the calendar.
3. Click **OK**.

Delete a calendar

1. Right-click the calendar that you wish to delete.
2. Select **Delete** [name of calendar].
3. Click **Yes**.

Working with multiple calendars

1. Ensure that more than one calendar is selected in the Navigation Pane (you can select calendars in **My Calendars** and **Other Calendars**).
2. Select **View > View in Overlay Mode** to overlay another calendar.

Share calendars – Grant permission to view your calendar and request permission to view a calendar

1. Click **Share My Calendar...** (It's on the left, in the Navigation Pane - fourth one down.
2. Address the Invitation and Send.

Appointments and Events

Schedule appointment using Click to add

1. Hover the mouse over a desired time slot.
2. Select the **Click to add appointment** box.
3. Enter the appointment Subject.
4. Drag the top or bottom border of the appointment. to change the start and end times.

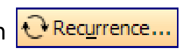
Schedule appointment using the appointment window

1. Double-click the time slot where you want to add the appointment.
2. Enter the appointment details.
3. Click the **Save & Close** button on the **Appointment** tab to return to the calendar.

Reschedule an appointment to another day or time

1. Double-click the appointment.
2. Adjust the dates and times as appropriate.
3. Click the **Save & Close** button.

Create a recurring appointment

1. Create a new appointment.
2. Click the ***Recurrence*** button 

on the **Appointment** tab.
3. Complete the appropriate details and click **OK**.

Schedule an event (all-day appointment)

1. Create a new appointment.
2. Select ***All day event***.

NOTE: Other convenience settings are

- change the **Show As** selection to **Free**.
- reminder to **None**.
- deselect Attendee Responses and Proposals.

3. Click **Save & Close**.

Choose free, busy, tentative or out of office

1. Create a new appointment.
2. Click the **Show As** drop-down arrow on the **Appointment** tab and select an appropriate option such as **Free**.
3. Click **Save & Close**.

Categorize activities

1. Create a new appointment.
2. Click the **Categorize** button on the **Appointment** tab and tick the category you wish to apply to the activity.
3. Click **Save & Close**.

Scheduling Meetings

Create a new meeting

1. Double-Click the calendar page to create a new appointment.
2. In the **Untitled – Appointment** window, click **Invite Attendees** to create a new meeting.

Schedule a meeting using busy search/scheduling

1. Create a meeting.
2. Click the **Scheduling** button on the **Meeting** tab.
3. Use the available buttons to find a suitable date/time for the meeting and click **Send**.

Tracking meeting responses

1. Double-click the meeting response in the **Inbox** to see who has/has not accepted; ***OR***
2. Open the meeting and click the **Tracking** button to view responses.

Change a meeting

1. Open the meeting by double-clicking on its entry in the **Calendar**.
2. Make any necessary changes.
3. Click the **Send Update** button.

Adding or removing attendees:

1. Open the meeting by double-clicking on its entry on the **Calendar**.
2. Click the Add or Remove Attendees button, add/remove names and then click **OK**.
3. Click the **Send Update** button.

Canceling a meeting

1. Double-click the desired meeting.
2. Click the **Cancel Meeting** button on the **Meeting** tab.
3. Make any other changes and then click the **Send Cancelation** button.

Save a draft meeting request

1. Create a meeting request and click the **Office Button**.
2. Be sure to enter a **date** and click **Save**.
3. The draft item is saved in your calendar on the date you entered.

Schedule a meeting without including yourself

1. Schedule and send a meeting request.
2. After all invited attendees have responded, delete the meeting request in your calendar without sending an update.

Contacts

Contacts give you immediate access to contact information for the people you need to interact with by email, phone, or otherwise.

Distribution Lists are usually used to send a group of people email, and cannot be shared.

Address Books contain contact records for a specific group of people, and can be shared.

Viewing contacts – changing your view

1. Click **Contacts** in the Navigation Pane.
2. In the **Current View** section, select which view you would like to use (Phone List, By Location, etc.).

Create a distribution list

1. Select **File** > **New** > **Distribution List**.
2. Enter a name and click **Select Members** in the Ribbon. Search the list.
3. To remove members from a list, click Remove (not Delete).

Create and share a new address book

1. Click **File**, **Folder…** , name the new address book, select **Contact Items** for Folder Contains and click **OK**.
2. Click Contacts in the Navigation Pane.
3. Right-click your new Address book and click **Share (your address book name)…**
4. Complete the sharing invitation.

Address book visibility: migrated address books

1. Click **Contacts**.
2. Right-click the **Address Book** in the Navigation Pane.
3. Click **Properties**.
4. Click the **Outlook Address Book.**
5. Select **Show this folder as an Address Book.**

Open a feature in a new window

Adding work area

1. Right-click any main feature button on the Navigation Pane.
2. Click **Open in New Window**.