How to access your CD files

The print edition of this book includes a CD. To access the CD files, go to http://aka.ms/623002/files, and look for the Downloads tab.

Note: Use a desktop web browser, as files may not be accessible from all ereader devices.

Questions? Please contact: mspinput@microsoft.com

Microsoft Press
Microsoft® Office Outlook® 2007
Step by Step

Joan Preppernau
Joyce Cox
Online Training Solutions, Inc.
Contents

About the Authors ................................................................. ix
Introducing Outlook 2007 ...................................................... xi
  What’s New in Outlook 2007 .............................................. xii
  Let’s Get Started! .............................................................. xiv
Information for Readers Running Windows XP .................. xv
  Managing the Practice Files ............................................. xv
  Using the Start Menu ....................................................... xvi
  Navigating Dialog Boxes ................................................ xvii
The Microsoft Business Certification Program .................. xix
  Selecting a Certification Path ........................................... xx
  Becoming a Microsoft Certified Application Specialist—
    Microsoft Office Outlook 2007 .................................... xx
  Taking a Microsoft Business Certification Exam ................ xxi
  For More Information ................................................... xxii
Features and Conventions of This Book .......................... xxiii
Using the Companion CD .................................................... xxv
  CD Contents ................................................................. xxv
  Minimum System Requirements ..................................... xxvi
  Installing the Practice Files ......................................... xxviii
  Using the Practice Files ................................................ xxi
  Removing and Uninstalling the Practice Files ................. xxx
Getting Help ................................................................. xxxi
  Errata & Book Support ................................................... xxxi
  Getting Help with Outlook 2007 ..................................... xxxi
  More Information .......................................................... xxxv
  We Want to Hear from You ............................................ xxxv
  Stay in Touch ............................................................... xxxv
Quick Reference ............................................................. xxxvii

What do you think of this book? We want to hear from you!

Microsoft is interested in hearing your feedback so we can continually improve our books and learning resources for you. To participate in a brief online survey, please visit:

www.microsoft.com/learning/booksurvey/
1 Getting Started with Outlook 2007
   Sidebar: Different Types of E-Mail Accounts ................................................. 2
   Connecting to Your Primary E-Mail Account ............................................... 3
   Troubleshooting the Startup Wizard ............................................................. 7
   Connecting to Additional E-Mail Accounts .................................................... 9
   Creating Additional Outlook Profiles ............................................................ 12
      Sidebar: Outlook with Business Contact Manager ....................................... 13
   Personalizing Your Outlook Workspace ......................................................... 16
   Exploring the Advanced Toolbar ................................................................. 24
   Key Points ........................................................................................................ 27

2 Managing Contact Information
   Working in the Contact Window .................................................................. 30
      Sidebar: Importing SharePoint Contacts Lists ............................................. 31
   Saving and Updating Contact Information .................................................... 37
      Sidebar: Quickly Communicating with Contacts ......................................... 44
   Organizing Contacts by Using Color Categories ............................................. 44
   Creating a Distribution List ........................................................................... 46
   Personalizing an Electronic Business Card .................................................... 49
   Creating an Additional Address Book ............................................................ 52
      Sidebar: Sharing Address Books ................................................................ 53
      Sidebar: Importing and Exporting Contact Records .................................... 56
   Displaying Different Views of Contact Information ........................................ 57
   Quickly Locating Contact Information ........................................................... 63
   Printing Contact Information ........................................................................ 65
      Sidebar: Creating a OneNote Page Linked to a Contact Record ................. 71
   Key Points ........................................................................................................ 71

3 Sending E-Mail Messages
   Working in the Message Window .................................................................. 74
      Sidebar: Outlook Message Formats ............................................................... 80
   Creating and Sending Messages .................................................................. 81
   Attaching Files to Messages .......................................................................... 87
      Sidebar: Resending and Recalling Messages .............................................. 88
      Sidebar: Sending Contact Information ....................................................... 91
   Creating and Formatting Business Graphics ................................................. 92
      Sidebar: Changing Message Settings and Delivery Options ...................... 98
## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personalizing the Appearance of Messages</td>
<td>100</td>
</tr>
<tr>
<td>Adding Signatures to Messages Automatically</td>
<td>106</td>
</tr>
<tr>
<td>Key Points</td>
<td>111</td>
</tr>
<tr>
<td><strong>4 Handling E-Mail Messages</strong></td>
<td>113</td>
</tr>
<tr>
<td>Viewing Messages and Message Attachments</td>
<td>114</td>
</tr>
<tr>
<td>Sidebar: Marking Messages as Read.</td>
<td>116</td>
</tr>
<tr>
<td>Replying to and Forwarding Messages</td>
<td>121</td>
</tr>
<tr>
<td>Sidebar: Deleting Messages</td>
<td>125</td>
</tr>
<tr>
<td>Working with New Mail Notifications</td>
<td>126</td>
</tr>
<tr>
<td>Creating a Task or an Appointment from a Message</td>
<td>130</td>
</tr>
<tr>
<td>Printing Messages</td>
<td>136</td>
</tr>
<tr>
<td>Key Points</td>
<td>141</td>
</tr>
<tr>
<td><strong>5 Managing Your Inbox</strong></td>
<td>143</td>
</tr>
<tr>
<td>Quickly Locating Messages</td>
<td>144</td>
</tr>
<tr>
<td>Arranging Messages in Different Ways</td>
<td>148</td>
</tr>
<tr>
<td>Sidebar: Using Search Folders</td>
<td>160</td>
</tr>
<tr>
<td>Organizing Messages by Using Color Categories</td>
<td>161</td>
</tr>
<tr>
<td>Organizing Messages in Folders</td>
<td>165</td>
</tr>
<tr>
<td>Sidebar: Creating a OneNote Page from an E-Mail Message</td>
<td>168</td>
</tr>
<tr>
<td>Archiving Messages</td>
<td>169</td>
</tr>
<tr>
<td>Key Points</td>
<td>173</td>
</tr>
<tr>
<td><strong>6 Managing Appointments, Events, and Meetings</strong></td>
<td>175</td>
</tr>
<tr>
<td>Working in the Calendar Item Windows</td>
<td>176</td>
</tr>
<tr>
<td>Scheduling and Changing Appointments</td>
<td>182</td>
</tr>
<tr>
<td>Scheduling and Changing Events</td>
<td>186</td>
</tr>
<tr>
<td>Scheduling, Updating, and Canceling Meetings</td>
<td>188</td>
</tr>
<tr>
<td>Sidebar: Using the Exchange Server 2007 Smart Scheduling Feature</td>
<td>189</td>
</tr>
<tr>
<td>Responding to Meeting Requests</td>
<td>192</td>
</tr>
<tr>
<td>Sidebar: Creating a Meeting Workspace</td>
<td>193</td>
</tr>
<tr>
<td>Key Points</td>
<td>195</td>
</tr>
<tr>
<td><strong>7 Managing Your Calendar</strong></td>
<td>197</td>
</tr>
<tr>
<td>Displaying Different Views of a Calendar</td>
<td>198</td>
</tr>
<tr>
<td>Sidebar: Adding and Removing Local Holidays</td>
<td>203</td>
</tr>
<tr>
<td>Defining Your Available Time</td>
<td>204</td>
</tr>
<tr>
<td>Configuring Outlook for Multiple Time Zones</td>
<td>206</td>
</tr>
</tbody>
</table>
8 Tracking Tasks

Working in the Task Window .................................................. 224
Displaying Different Views of Tasks ........................................ 229
Sidebar: Finding and Organizing Tasks .................................... 231
Creating and Updating Tasks .................................................. 232
Managing Task Assignments ................................................... 238
Removing Tasks from Your Task List ...................................... 240
Sidebar: Tracking and Updating Tasks Created in OneNote .......... 243
Key Points ............................................................................. 243

9 Gathering Information

Subscribing to RSS Feeds ......................................................... 246
Participating in Newsgroups .................................................... 250
Recording Information by Using Notes ................................... 251
Linking Notes to Contacts ...................................................... 254
Sidebar: Recording Information in the Journal ......................... 256
Sidebar: Saving a Note as a File ................................................. 257
Sharing Notes ........................................................................ 257
Key Points ............................................................................. 259

10 Collaborating with Other People

Sharing Your Folders with Other People ................................. 262
Accessing Other People’s Folders ............................................ 266
Creating a Document Workspace from Outlook ...................... 269
Sidebar: Creating Group Schedules ......................................... 271
Working Offline with Document Library Contents .................... 272
Connecting to a SharePoint Calendar ...................................... 274
Key Points ............................................................................. 275
11 Working Away from Your Office 277
   Connecting Outlook to Your Server from a Remote Location .................. 278
   Sidebar: Connecting Through OWA .................................................. 283
   Working with Outlook Items While Offline ....................................... 283
   Sidebar: Viewing Contacts While Offline ......................................... 286
   Automatically Responding to Messages ........................................... 287
   Key Points ....................................................................................... 295

12 Customizing and Configuring Outlook 297
   Making Favorite Outlook Commands Easily Accessible ......................... 298
   Personalizing Your Office and Outlook Settings ................................. 301
      Sidebar: Creating Outlook Forms .................................................. 305
      Sidebar: Adding and Removing Toolbar Commands ............................ 306
   Creating Rules to Process Messages ................................................. 307
   Storing E-Mail Messages on Your Computer ...................................... 314
   Securing Your E-Mail ................................................................. 317
      Sidebar: Obtaining a Digital ID ...................................................... 318
      Sidebar: Protecting Your Privacy .................................................. 322
   Blocking Unwanted Messages ....................................................... 323
   Specifying Advanced E-Mail Options .............................................. 327
   Key Points ....................................................................................... 331

Glossary ......................................................................................... 333

Index ............................................................................................. 339
About the Authors

Joan Preppernau

Joan has worked in the training and certification industry for 12 years. As President of Online Training Solutions, Inc. (OTSI), Joan is responsible for guiding the translation of technical information and requirements into useful, relevant, and measurable training, learning, and certification deliverables. Joan is a Microsoft Certified Technical Specialist (MCTS), a Microsoft Certified Application Specialist (MCAS), and the author or co-author of more than a dozen books about Windows and the Microsoft Office system.

Joan has lived and worked in New Zealand, Sweden, Denmark, and various locations in the U.S. during the past two decades, and is now happily ensconced in America’s Finest City—San Diego, California—with her husband, Barry, and their daughter, Trinity, who truly believes that “working on chapters” is what all mommies do at night.

Joyce Cox

Joyce has 25 years’ experience in the development of training materials about technical subjects for non-technical audiences, and is the author of dozens of books about Office and Windows technologies. She is the Vice President of OTSI. She was President of and principal author for Online Press, where she developed the Quick Course series of computer training books for beginning and intermediate adult learners. She was also the first managing editor of Microsoft Press, an editor for Sybex, and an editor for the University of California. Joyce and her husband, Ted, live in downtown Bellevue, Washington, and escape as often as they can to their tiny, offline cabin in the Cascade foothills.
The Team

This book would not exist without the support of these hard-working members of the OTSI publishing team:

- Susie Bayers
- Jan Bednarczuk
- RJ Cadranell
- Jeanne Craver
- Kathy Krause
- Marlene Lambert
- Jaime Odell
- Jean Trenary
- Lisa Van Every

We are especially thankful to the support staff at home who make it possible for our team members to devote their time and attention to these projects.

Juliana Aldous, Sandra Haynes, and Bill Teel provided invaluable support on behalf of Microsoft Press.

Online Training Solutions, Inc. (OTSI)

OTSI specializes in the design, creation, and production of Office and Windows training products for information workers and home computer users. For more information about OTSI, visit:

www.otsi.com
Introducing Outlook 2007

Bill Gates’s dream of “a computer on every desktop” is becoming more and more of a reality—many people today work (and play) on computers both in the office and at home. For people who spend much of the day at a computer and are dependent on electronic messages as a means of communicating with colleagues, clients, friends, and family members, Microsoft Office Outlook 2007 offers an ideal solution. Outlook 2007 integrates e-mail, address books, calendars, task lists, note pads, and more into one place, and more importantly, makes this information immediately available to you when you need it. From one window, you can work with e-mail messages, find contact information, view upcoming appointments, and track tasks. From one place, you can quickly search your messages (and message attachments) and organize your work more easily and in a more intuitive way. You can use Outlook to:

- Send, receive, organize, and archive e-mail messages.
- Send documents, spreadsheets, graphics, and other files as message attachments, and preview attachments you receive from other people.
- Schedule events, appointments, and meetings, invite attendees, and reserve conference rooms, projectors, and other managed resources.
- View upcoming appointments and tasks, and receive reminders for them.
- Store contact information in a transferable format that easily interacts with your e-mail system.
- Track tasks for yourself or for someone else, and schedule time to complete your tasks.
- Store random bits of information as notes.
- Share schedule information with other people, inside and outside your organization.
- Track the interactions you have with other people.
- Organize and easily locate information in messages, attachments, calendars, contacts, and tasks.
- Filter out unwanted and annoying junk messages.
- Have information from favorite Web sites delivered directly to you.
What’s New in Outlook 2007

The basic concepts of Outlook remain the same in the 2007 release as in earlier versions, with a few additions. The biggest improvement in this version is the way that the various functions and tools have been linked and organized, making it much easier to use all the tools from one place. The biggest change in this version is in the way tools and commands are available in the Outlook item windows. Instead of the traditional menus and toolbars which are still present in the program window, commands in the message, contact, appointment, and other item windows are organized in groups by function. The groups are organized on tabs by process, and all the tabs are organized on the “Ribbon” that is part of the Microsoft Office Fluent user interface available in several programs in the 2007 Microsoft Office system.

The new command structure might take some getting used to, but if you use other Office programs, you’ll find that you can come up to speed pretty quickly.

If you’re upgrading to Outlook 2007 from a previous version, you’re probably more interested in the differences between the old and new versions and how they will affect you than you are in the basic functionality of Outlook. We don’t identify new features with a special margin icon (as we did in previous versions of this book). We do, however, list them here. The following sections list new features introduced in Outlook 2007 and Outlook 2003. Throughout this book, we include special discussions about features that are new in Outlook 2007, including the benefits of the feature, how to use it, and any potential problems you might encounter.

If You Are Upgrading from Outlook 2003

If you have been using Outlook 2003, you might not expect to see many improvements in Outlook 2007, but you will soon realize that this is not just an incremental upgrade to what seemed like a pretty comprehensive set of features and tools. Outlook 2007 includes a long list of new and improved features, including the following:

- **Redesigned user interface.** Compose, format, and act upon information in a more accessible, intuitive way.
- **To-Do Bar.** View your appointments and tasks for the day.
- **Instant Search.** Search for keywords, dates, or other criteria in your e-mail messages, calendar, contact records, or task list.
- **Calendar functionalities.** Create and publish Internet calendars, and e-mail calendar snapshots.
- **Share information in one interface.** Interact with Windows SharePoint Services to share and manage information.
Color Categories. Easily personalize and add categories to e-mail, calendar items, contacts, or tasks.

View your Really Simple Syndication (RSS) feeds. Catch up on the latest news or blogs right from within Outlook.

Attachment Preview. Preview your attachments directly in the Reading Pane.

If You Are Upgrading from Outlook 2002

In addition to the features listed in the previous section, if you’re upgrading from Outlook 2002 (part of the Microsoft Office XP system), you’ll want to take note of the following new features that were introduced in Outlook 2003:

Navigation Pane. Quickly access your mail, calendar, contacts, tasks, and other Outlook items.

Reading Pane. Open attachments without opening the item.

Desktop Alerts. Read and respond to an e-mail message without closing other applications.

Shared Attachments. Post attachments for group input.

Arrangements. View your messages in any of 13 predefined views.

Quick Flags. Quickly mark messages for follow-up.

Unique signature per account. Assign a different signature to each Outlook account.

Arrange by Conversation. View your messages in a new way.

Search Folders. Collect and automatically update related information in virtual folders.

Rules. Create and organize rules in an easier way.

Calendar View. View your Calendar and the Date Navigator in a new, streamlined format.

Side-by-side calendars. View multiple calendars at the same time.

Contact Picture. Add a picture to an Address Book entry.

View SharePoint Team Services contacts. See a list of contacts with whom you can share information.

RPC over HTTP. Connect directly to your Microsoft Exchange Server from Outlook over the Internet.

Cached Exchange Mode. Store a local copy of your mailbox on your computer.
● **Go menu.** Quickly switch between panes in the Navigation Pane.

● **New Data File Type (.pst).** Create a Personal Folders file.

● **Expand Distribution Lists in an e-mail message.** Display the individual names of Distribution List members to edit the recipients of a message.

● **Information Rights Management.** Create messages with restricted permission to prevent messages from being forwarded, printed, copied, or edited by unauthorized people.

● **Enhanced privacy features.** Block or allow external Web content such as pictures or sounds to display in e-mail messages, and prevent Web beacons from validating your e-mail address to junk mail senders.

---

**Let’s Get Started!**

With this version, Outlook has truly come into its own as a full-fledged information management system, making it easier than ever to efficiently handle communications, schedules, and tasks all in one convenient location. We look forward to showing you around Outlook 2007 and sharing with you our enthusiasm for this truly useful product.
Information for Readers Running Windows XP

The graphics and the operating system–related instructions in this book reflect the Windows Vista user interface. However, Windows Vista is not required; you can also use a computer running Windows XP.

Most of the differences you will encounter when working through the exercises in this book on a computer running Windows XP center around appearance rather than functionality. For example, the Windows Vista Start button is round rather than rectangular and is not labeled with the word Start; window frames and window-management buttons look different; and if your system supports Windows Aero, the window frames might be transparent.

In this section, we provide steps for navigating to or through menus and dialog boxes in Windows XP that differ from those provided in the exercises in this book. For the most part, these differences are small enough that you will have no difficulty in completing the exercises.

Managing the Practice Files

The instructions given in the “Using the Companion CD” section are specific to Windows Vista. The only differences when installing, using, uninstalling, and removing the practice files supplied on the companion CD are the default installation location and the uninstall process.

On a computer running Windows Vista, the default installation location of the practice files is Documents\Microsoft Press\Outlook2007SBS. On a computer running Windows XP, the default installation location is My Documents\Microsoft Press\Outlook2007SBS. If your computer is running Windows XP, whenever an exercise tells you to navigate to your Documents folder, you should instead go to your My Documents folder.

To uninstall the practice files from a computer running Windows XP:

1. On the Windows taskbar, click the Start button, and then click Control Panel.
2. In Control Panel, click (or in Classic view, double-click) Add or Remove Programs.
3. In the Add or Remove Programs window, click Microsoft Office Outlook 2007 Step by Step, and then click Remove.

4. In the Add or Remove Programs message box asking you to confirm the deletion, click Yes.

**Important** If you need help installing or uninstalling the practice files, please see the “Getting Help” section later in this book. Microsoft Product Support Services does not provide support for this book or its companion CD.

### Using the Start Menu

To start Outlook 2007 on a computer running Windows XP:

→ Click the Start button, point to All Programs, click Microsoft Office, and then click Microsoft Office Outlook 2007.

Folders on the Windows Vista Start menu expand vertically. Folders on the Windows XP Start menu expand horizontally. You will notice this variation between the images shown in this book and your Start menu.
Navigating Dialog Boxes

On a computer running Windows XP, some of the dialog boxes you will work with in the exercises not only look different from the graphics shown in this book but also work differently. These dialog boxes are primarily those that act as an interface between Outlook and the operating system, including any dialog box in which you navigate to a specific location. For example, here are the Insert File dialog boxes from Outlook 2007 running on Windows Vista and Windows XP and some examples of ways to navigate in them.

To navigate to the ManagingContacts folder in Windows XP:

- On the Places bar, click My Documents. Then in the folder content pane, double-click Microsoft Press, Outlook2007SBS, and then ManagingContacts.

To move back to the Outlook2007SBS folder in Windows XP:

- On the toolbar, click the Up One Level button.
The Microsoft Business Certification Program

Desktop computing proficiency is becoming increasingly important in today’s business world. As a result, when screening, hiring, and training employees, more employers are relying on the objectivity and consistency of technology certification to ensure the competence of their workforce. As an employee or job seeker, you can use technology certification to prove that you already have the skills you need to succeed, saving current and future employers the trouble and expense of training you.

The Microsoft Business Certification program is designed to assist employees in validating their Windows Vista skills and 2007 Microsoft Office program skills. There are two paths to certification:

- A Microsoft Certified Application Specialist (MCAS) is an individual who has demonstrated worldwide skill standards for Windows Vista or the 2007 Office system through a certification exam in Windows Vista or in one or more of the 2007 Office system programs, including Microsoft Office Word 2007, Microsoft Office Excel 2007, Microsoft Office PowerPoint 2007, Microsoft Office Outlook 2007, and Microsoft Office Access 2007.

- A Microsoft Certified Application Professional (MCAP) is an individual who has taken his or her knowledge of the 2007 Microsoft Office suite and of Microsoft SharePoint Products and Technologies to the next level and has demonstrated through a certification exam that he or she can use the collaborative power of the Office suite to accomplish job functions such as Budget Analysis and Forecasting, or Content Management and Collaboration.

After attaining certification, you can include the MCAS or MCAP logo with the appropriate certification designator on your business cards and other personal promotional materials. This logo attests to the fact that you are proficient in the applications or cross-application skills necessary to achieve the certification.
Selecting a Certification Path

When selecting the Microsoft Business Certification path that you would like to pursue, you should assess the following:

- The program and program version(s) with which you are familiar
- The length of time you have used the program
- Whether you have had formal or informal training in the use of that program

Candidates for MCAS-level certification are expected to successfully complete a wide range of standard business tasks, such as formatting a document or worksheet. Successful candidates generally have at least six months of experience with Windows Vista or the specific Office program, including either formal, instructor-led training or self-study using approved books, guides, or interactive computer-based materials.

Candidates for MCAP-level certification are expected to successfully complete more complex, business-oriented tasks utilizing advanced functionality with the 2007 Office system and SharePoint. Successful candidates generally have between six months and one or more years of experience with the programs, including formal, instructor-led training or self-study using approved study materials.

Becoming a Microsoft Certified Application Specialist—Microsoft Office Outlook 2007

Every MCAS and MCAP certification exam is developed from a set of exam skill standards that are derived from studies of how Windows Vista and the 2007 Office programs are used in the workplace. Because these skill standards dictate the scope of each exam, they provide you with critical information on how to prepare for certification.

To become certified as a Microsoft Certified Application Specialist for Microsoft Office Outlook 2007, you must pass Exam 77-605, Using Microsoft Office Outlook 2007, by demonstrating proficiency in these five areas:

- **Managing messaging.** You must demonstrate the ability to create, send, reply to, and forward e-mail messages; create automatic signatures and reply messages; attach files to messages; preview, save, and open attachments; set message sensitivity, importance, security, and delivery options; and view messages in different ways.

- **Managing scheduling.** You must demonstrate the ability to create one-time and recurring appointments, meetings, and events, from scratch and from e-mail messages and tasks; schedule meetings and update, cancel, and respond to meeting
requests; customize your work week, time zones, and holidays; share and publish your calendar; and view other calendars.

- **Managing tasks.** You must demonstrate the ability to create and modify one-time and recurring tasks from scratch and from messages; set the status, priority, and percent completion of a task and mark it as complete or private; and assign tasks to others and respond to tasks assigned by others.

- **Managing contacts and personal contact information.** You must demonstrate the ability to create and modify contacts from scratch or from messages, electronic business cards, and contact records; create and send an electronic business card, and use it as a signature; create and modify distribution lists; and create or import a secondary address book.

- **Organizing information.** You must demonstrate the ability to categorize and sort messages, appointments, meetings, contacts, and tasks by color; create and manage data files; create and populate mail folders; manage deleted, sent, and junk messages; locate specific messages, appointments, tasks, or contacts; create, modify, and remove rules to manage messages; customize the Outlook environment; and configure Outlook 2007 to be accessible over the Internet.

## Taking a Microsoft Business Certification Exam

The MCAS and MCAP certification exams for Windows Vista and the 2007 Office programs are performance-based and require you to complete business-related tasks using an interactive simulation (a digital model) of the Windows Vista operating system or one or more programs in the Office system.

### Test-Taking Tips

- Follow all instructions provided in each question completely and accurately.
- Enter requested information as it appears in the instructions, but without duplicating the formatting unless you are specifically instructed to do otherwise. For example, the text and values you are asked to enter might appear in the instructions in bold and underlined (text), but you should enter the information without applying these formats.
- Close all dialog boxes before proceeding to the next exam question unless you are specifically instructed otherwise.
- Don’t close task panes before proceeding to the next exam question unless you are specifically instructed to do otherwise.
If you are asked to print a document, worksheet, chart, report, or slide, perform the task, but be aware that nothing will actually be printed.

Don’t worry about extra keystrokes or mouse clicks. Your work is scored based on its result, not on the method you use to achieve that result (unless a specific method is indicated in the instructions), and not on the time you take to complete the question.

If your computer becomes unstable during the exam (for example, if the exam does not respond or the mouse no longer functions) or if a power outage occurs, contact a testing center administrator immediately. The administrator will restart the computer and return the exam to the point where the interruption occurred with your score intact.

**Certification**

At the conclusion of the exam, you will receive a score report, which you can print with the assistance of the testing center administrator. If your score meets or exceeds the passing standard (the minimum required score), you will be mailed a printed certificate within approximately 14 days.

**For More Information**

To learn more about the Microsoft Business Certification exams and courseware, visit:

Features and Conventions of This Book

This book has been designed to lead you step by step through all the tasks you are most likely to want to perform in Microsoft Office Outlook 2007. If you start at the beginning and work your way through all the exercises, you will gain enough proficiency to be able to manage all types of information through Outlook. However, each topic is self contained. If you have worked with a previous version of Outlook, or if you completed all the exercises and later need help remembering how to perform a procedure, the following features of this book will help you locate specific information:

- **Detailed table of contents.** A listing of the topics and sidebars within each chapter.
- **Chapter thumb tabs.** Easily locate the beginning of the chapter you want.
- **Topic-specific running heads.** Within a chapter, quickly locate the topic you want by looking at the running head of odd-numbered pages.
- **Quick Reference.** General instructions for each procedure covered in specific detail elsewhere in the book. Refresh your memory about a task while working with your own documents.
- **Detailed index.** Look up specific tasks and features and general concepts in the index, which has been carefully crafted with the reader in mind.
- **Companion CD.** Contains the practice files needed for the step-by-step exercises, as well as a fully searchable electronic version of this book and other useful resources.

In addition, we provide a glossary of terms for those times when you need to look up the meaning of a word or the definition of a concept.

You can save time when you use this book by understanding how the *Step by Step* series shows special instructions, keys to press, buttons to click, and so on.
<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>USE</strong></td>
<td>This paragraph preceding a step-by-step exercise indicates the practice files that you will use when working through the exercise.</td>
</tr>
<tr>
<td><strong>BE SURE TO</strong></td>
<td>This paragraph preceding or following an exercise indicates any requirements you should attend to before beginning the exercise or actions you should take to restore your system after completing the exercise.</td>
</tr>
<tr>
<td><strong>OPEN</strong></td>
<td>This paragraph preceding a step-by-step exercise indicates files that you should open before beginning the exercise.</td>
</tr>
<tr>
<td><strong>CLOSE</strong></td>
<td>This paragraph following a step-by-step exercise provides instructions for closing open files or programs before moving on to another topic.</td>
</tr>
<tr>
<td><strong>1 2</strong></td>
<td>Blue numbered steps guide you through step-by-step exercises and Quick Reference versions of procedures.</td>
</tr>
<tr>
<td><strong>1 2</strong></td>
<td>Black numbered steps guide you through procedures in sidebars and expository text.</td>
</tr>
<tr>
<td>➜</td>
<td>An arrow indicates a procedure that has only one step.</td>
</tr>
<tr>
<td><strong>See Also</strong></td>
<td>These paragraphs direct you to more information about a given topic in this book or elsewhere.</td>
</tr>
<tr>
<td><strong>Troubleshooting</strong></td>
<td>These paragraphs explain how to fix a common problem that might prevent you from continuing with an exercise.</td>
</tr>
<tr>
<td><strong>Tip</strong></td>
<td>These paragraphs provide a helpful hint or shortcut that makes working through a task easier, or information about other available options.</td>
</tr>
<tr>
<td><strong>Important</strong></td>
<td>These paragraphs point out information that you need to know to complete a procedure.</td>
</tr>
<tr>
<td><strong>Save</strong></td>
<td>The first time you are told to click a button in an exercise, a picture of the button appears in the left margin. If the name of the button does not appear on the button itself, the name appears under the picture.</td>
</tr>
<tr>
<td><strong>Enter</strong></td>
<td>In step-by-step exercises, keys you must press appear as they would on a keyboard.</td>
</tr>
<tr>
<td><strong>Ctrl + Home</strong></td>
<td>A plus sign (+) between two key names means that you must hold down the first key while you press the second key. For example, “press <strong>Ctrl</strong> + <strong>Home</strong>” means “hold down the <strong>Ctrl</strong> key while you press the <strong>Home</strong> key.”</td>
</tr>
</tbody>
</table>

**Program interface elements**
- In steps, the names of program elements, such as buttons, commands, and dialog boxes, are shown in black bold characters.

**User input**
- Anything you are supposed to type appears in blue bold characters.

**Glossary terms**
- Terms that are explained in the glossary at the end of the book are shown in blue italic characters.
Using the Companion CD

The companion CD included with this book contains the practice files you’ll use as you work through the book’s exercises, as well as other electronic resources that will help you learn how to use Microsoft Office Outlook 2007.

**Companion Content for Digital Book Readers:** If you bought a digital edition of this book, you can enjoy select content from the print edition’s companion CD. Visit [http://go.microsoft.com/fwlink/?Linkid=214144](http://go.microsoft.com/fwlink/?Linkid=214144) to get your downloadable content. This content is always up-to-date and available to all readers.

### CD Contents

The companion CD contains practice files necessary to complete the step-by-step exercises. In this book, you will create most of the practice files while working through the initial exercises. This ensures that the practice files work with your system—for example, that e-mail messages are sent between real e-mail accounts.

The following table lists the practice files supplied on the companion CD.

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Folders\Files</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chapter 1: Getting Started with Outlook 2007</td>
<td>None</td>
</tr>
<tr>
<td>Chapter 2: Managing Contact Information</td>
<td>ManagingContacts\FourthCoffee.png</td>
</tr>
<tr>
<td>Chapter 3: Sending E-Mail Messages</td>
<td>SendingMessages\Attaching.docx, SendingMessages\Attaching.pptx</td>
</tr>
<tr>
<td>Chapter 4: Handling E-Mail Messages</td>
<td>None</td>
</tr>
<tr>
<td>Chapter 5: Managing Your Inbox</td>
<td>None</td>
</tr>
<tr>
<td>Chapter 6: Managing Appointments, Events, and Meetings</td>
<td>None</td>
</tr>
<tr>
<td>Chapter 7: Managing Your Calendar</td>
<td>None</td>
</tr>
<tr>
<td>Chapter 8: Tracking Tasks</td>
<td>None</td>
</tr>
<tr>
<td>Chapter 9: Gathering Information</td>
<td>None</td>
</tr>
<tr>
<td>Chapter 10: Collaborating with Other People</td>
<td>None</td>
</tr>
<tr>
<td>Chapter 11: Working Away from Your Office</td>
<td>None</td>
</tr>
<tr>
<td>Chapter 12: Customizing and Configuring Outlook</td>
<td>None</td>
</tr>
</tbody>
</table>
In addition to the practice files, the CD contains the following resources in electronic format:

- *Microsoft Office Outlook 2007 Step by Step*
- *Microsoft Computer Dictionary, Fifth Edition*
- Sample chapter and poster from *Look Both Ways: Help Protect Your Family on the Internet* (Linda Criddle, 2007)
- Windows Vista product guide

**Important**  The companion CD for this book does not contain the Outlook 2007 software. You should purchase and install that program before using this book.

### Minimum System Requirements

#### 2007 Microsoft Office System

The 2007 Microsoft Office system includes the following programs:

- Microsoft Office Access 2007
- Microsoft Office Communicator 2007
- Microsoft Office Excel 2007
- Microsoft Office Groove 2007
- Microsoft Office InfoPath 2007
- Microsoft Office OneNote 2007
- Microsoft Office Outlook 2007
- Microsoft Office Outlook 2007 with Business Contact Manager
- Microsoft Office PowerPoint 2007
- Microsoft Office Publisher 2007
- Microsoft Office Word 2007

To install and run these programs, your computer needs to meet the following minimum requirements:

- 500 megahertz (MHz) processor
- 256 megabytes (MB) RAM
- CD or DVD drive
- 2 gigabytes (GB) available hard disk space; a portion of this disk space will be freed if you select the option to delete the installation files

**Tip**  Hard disk requirements will vary depending on configuration; custom installation choices might require more or less hard disk space.

- Monitor with 800×600 screen resolution; 1024×768 or higher recommended
- Keyboard and mouse or compatible pointing device
- Internet connection, 128 kilobits per second (Kbps) or greater, for download and activation of products, accessing Microsoft Office Online and online Help topics, and any other Internet-dependent processes
- Windows Vista with Service Pack 1 (SP1), Windows XP with Service Pack 2 (SP2), or Windows Server 2003
- Windows Internet Explorer 7 or Microsoft Internet Explorer 6 with service packs


**Step-by-Step Exercises**

In addition to the hardware, software, and connections required to run the 2007 Microsoft Office system, you will need the following to successfully complete the exercises in this book:

- Access to a printer
- 1 MB of available hard disk space for the practice files
Installing the Practice Files

You need to install the practice files in the correct location on your hard disk drive before you can use them in the exercises. Follow the steps below.

**Tip** If for any reason you are unable to install the practice files from the CD, the files can also be downloaded from the web at [http://www.microsoftpressstore.com/title/9780735623002](http://www.microsoftpressstore.com/title/9780735623002).

1. Remove the companion CD from the envelope at the back of the book, and insert it into the CD drive of your computer. If the **AutoPlay** window opens, click **Run startcd.exe**.

   The Microsoft Software License Terms appear. To use the practice files, you must accept the terms of the license agreement.

2. Click **I accept the agreement**, and then click **Next**.

   After you accept the license agreement, the CD interface appears.

**Important** If the menu screen does not appear, click the Start button, and then click Computer. Display the Folders list in the Navigation Pane, click the icon for your CD drive, and then in the right pane, double-click the StartCD executable file.

3. Click **Practice Files**. If the **File Download** and/or **Internet Explorer Security** dialog boxes open, click **Run**.

4. On the **Welcome** page of the InstallShield Wizard, click **Next**. On the **License Agreement** page, click **I accept the terms in the license agreement**, and then click **Next**. Click **Next** on the first screen, and then click **Next** to accept the terms of the license agreement on the next screen.

5. If you want to install the practice files to a location other than the default folder (*Documents*\*Microsoft Press*\*Outlook2007SBS*), click the **Change** button, select the new drive and path, and then click **OK**.

**Important** If you install the practice files to a location other than the default, you will need to substitute that path within the exercises.

6. On the **Custom Setup** page, click **Next**, and then on the **Ready to Install the Program** screen, click **Install**.

7. After the practice files have been installed, click **Finish**.
9. Remove the companion CD from the CD drive, and return it to the envelope at the back of the book.

Using the Practice Files

When you install the practice files from the companion CD that accompanies this book, the files are stored on your hard disk in chapter-specific subfolders of your Documents\Microsoft Press\Outlook2007SBS folder. Each exercise is preceded by a paragraph that lists the files needed for that exercise and explains any preparations needed before you start working through the exercise. Here are examples:

USE the Andrea Dunker and John Emory contact records you created earlier in this chapter.
BE SURE TO display the Contacts module before beginning this exercise.

You can browse to the practice files in Windows Explorer by following these steps:

1. On the Windows taskbar, click the Start button, and then click Documents.
2. In your Documents folder, double-click Microsoft Press, double-click Outlook2007SBS, and then double-click a specific chapter folder.

You can browse to the practice files from an Outlook 2007 dialog box by following these steps:

1. On the Favorite Links pane in the dialog box, click Documents.
2. In your Documents folder, double-click Microsoft Press, double-click Outlook2007SBS, and then double-click the specified chapter folder.

Tip You can also view the practice files by selecting Browse on the CD menu.
Removing and Uninstalling the Practice Files

After you finish working through this book, delete the practice messages, appointments, contacts, and other Outlook items you created while working through the exercises, and then uninstall the practice files that were installed from the companion CD. Follow these steps:

1. On the Windows taskbar, click the **Start** button, and then click **Control Panel**.
2. In **Control Panel**, under **Programs**, click the **Uninstall a program** task.
3. In the **Programs and Features** window, click **Microsoft Office Outlook 2007 Step by Step**, and then on the toolbar at the top of the window, click the **Uninstall** button.
4. If the **Programs and Features** message box asking you to confirm the deletion appears, click **Yes**.

**See Also** If you need additional help installing or uninstalling the practice files, see the “Getting Help” section later in this book.

**Important** Microsoft Product Support Services does not provide support for this book or its companion CD.
Getting Help

Every effort has been made to ensure the accuracy of this book and the contents of its companion CD. If you do run into problems, please contact the sources listed below for assistance.

Errata & Book Support

We’ve made every effort to ensure the accuracy of this book and its companion content. Any errors that have been reported since this book was published are listed on our Microsoft Press site:


If you find an error that is not already listed, you can report it to us through the same page.

If you need additional support, email Microsoft Press Book Support at mspinput@microsoft.com.

Please note that product support for Microsoft software is not offered through the addresses above.

Getting Help with Outlook 2007

If your question is about Microsoft Office Outlook 2007, and not about the content of this Microsoft Press book, your first recourse is the Outlook Help system. This system is a combination of tools and files stored on your computer when you installed Outlook and, if your computer is connected to the Internet, information available from Microsoft Office Online. You can find general or specific help information in several ways.

- To find out about an item on the screen, you can display a ScreenTip. For example, to display a ScreenTip for a button, point to the button without clicking it. The ScreenTip gives the button’s name, the associated keyboard shortcut if there is one, and in an item window featuring the Microsoft Office Fluent Ribbon, a description of what the button does when you click it.

- In the Outlook program window, you can click the Help button (labeled with a question mark) at the right end of the Standard toolbar, or press the F1 key, to display the Outlook Help window.
In a dialog box, you can click the Help button at the right end of the dialog box title bar to display the Help window with topics related to the functions of that dialog box already identified.

You can enter a search term or question in the Type A Question For Help box at the right end of the program window menu bar, and then press Enter to display the Outlook Help window with related topics identified.

If you want to practice getting help, you can work through the following exercise, which demonstrates two ways of locating information.

**BE SURE TO** start Outlook before beginning this exercise.

1. At the right end of the menu bar, click the **Type a question for help** box.
2. Type **How do I get help?**, and then press the **Enter** key.

A list of topics that relate to your question appears in the Search Results task pane. If you have an active Internet connection, this list includes current content from Microsoft Office Online, so your results might vary from those shown here.

You can click any of the listed topics to get more information or instructions.
3. In the **Search Results** task pane, scroll the results list, and then click a topic that interests you.

The Outlook Help window opens, displaying information about that topic.

4. At the right end of the **Outlook Help** window’s title bar, click the **Maximize** button, and then in the topic pane, click **Show All**.

The topic content expands to provide in-depth information about getting help while you work.

5. At the right end of the Outlook Help window’s title bar, click the **Close** button.

6. To access the Help system in a different way, on the **Help** menu, click **Microsoft Office Outlook Help**.

   Outlook Help opens, displaying a basic topic list from which you can browse to information.

7. On the Outlook Help window’s toolbar, click the **Table of Contents** button.
The Table Of Contents pane opens, displaying the same list in a tree structure that you can expand.

8. In the Table of Contents pane, click E-mail, click Creating messages, and then click Save a message.

Outlook Help displays the Save A Message topic.

9. Experiment on your own with finding information in Outlook Help.

CLOSE the Outlook Help window when you finish.
More Information

If your question is about Outlook 2007 or another Microsoft software product and you cannot find the answer in the product’s Help system, please search the appropriate product solution center or the Microsoft Knowledge Base at:

support.microsoft.com

In the United States, Microsoft software product support issues not covered by the Microsoft Knowledge Base are addressed by Microsoft Product Support Services. Location-specific software support options are available from:

support.microsoft.com/gp/selfoverview/

We Want to Hear from You

At Microsoft Press, your satisfaction is our top priority, and your feedback our most valuable asset. Please tell us what you think of this book at:

http://www.microsoft.com/learning/booksurvey

The survey is short, and we read every one of your comments and ideas. Thanks in advance for your input!

Stay in Touch

Let’s keep the conversation going! We’re on Twitter: http://twitter.com/MicrosoftPress
Quick Reference

1 Getting Started with Outlook 2007

To configure Outlook to connect to an e-mail account
1. On the Start menu, point to All Programs, click Microsoft Office, and then click Microsoft Office Outlook 2007.
2. On the welcome page of the Outlook 2007 Startup wizard, click Next.
3. On the E-mail Upgrade Options page, click Do not upgrade, and then click Next.
4. On the E-mail Accounts page, with the Yes option selected, click Next.
5. On the Auto Account Setup page, enter your name, e-mail address, and password in the corresponding text boxes, and then click Next.

To manually configure your Exchange Server account settings
1. On the Start menu, point to All Programs, click Microsoft Office, and then click Microsoft Office Outlook 2007.
2. On the welcome page of the Outlook 2007 Startup wizard, click Next.
3. On the E-mail Upgrade Options page, click Do not upgrade, and then click Next.
4. On the E-mail Accounts page, with the Yes option selected, click Next.
5. On the Auto Account Setup page select the Manually configure server settings check box, and then click Next.
6. On the Choose E-mail Service page, click Microsoft Exchange Server, and then click Next.
7. On the Microsoft Exchange Settings page, enter the name or address of your Exchange Server and your user name, and then click the Check Name button. If the Connect to dialog box appears, enter your logon information, and then click OK.
8. After your name is underlined, click Next, and then on the final page of the wizard, click Finish.

To connect to an additional e-mail account
1. On the Tools menu, click Account Settings.
2. On the E-mail tab of the Account Settings dialog box, click the New button.
3. On the Choose E-mail Service page of the Add New E-mail Account wizard, with the Microsoft Exchange Server, POP3, IMAP, or HTTP option selected, click Next.
4. On the Auto Account Setup page, enter the account display name, the e-mail address, and the password of the account you want to add to your profile. Then click Next.

5. Click Finish to complete the account setup.

To create an additional Outlook profile

1. Exit Outlook if it is running.

2. Display Control Panel in Classic View, and then double-click the Mail icon. In the User Account Control dialog box, if you’re logged on as an administrator, click Continue. Otherwise, enter an administrator password, and then click OK.

3. In the Mail Setup dialog box, click the Show Profiles button.

4. In the Mail dialog box, click the Add button.

5. In the Profile Name box, type a name to identify the new profile, and then click OK.

6. On the Choose E-mail Service page, with the Microsoft Exchange Server, POP3, or IMAP option selected, click Next.

7. On the Auto Account Setup page, enter the name, e-mail address, and password in the corresponding text boxes, and then click Next.

8. After Outlook connects to the e-mail account, click Finish.

To configure Outlook to prompt for a profile when starting

1. Display Control Panel in Classic View, and then double-click the Mail icon. In the User Account Control dialog box, if you’re logged on as an administrator, click Continue. Otherwise, enter an administrator password, and then click OK.

2. In the Mail Setup dialog box, click Show Profiles.

3. In the Mail dialog box, click Prompt for a profile to be used, and then click OK.

2 Managing Contact Information

To import information from a SharePoint Contacts List to your Outlook contacts folder

1. Display the SharePoint site in your Web browser, and then display the SharePoint Contacts List you want to import.

2. On the Actions menu, click Link to Outlook.

3. In the Microsoft Office Outlook message box asking whether you want to connect the SharePoint Contacts List to Outlook, click Yes.

To create a contact record

1. With the Contacts pane displayed, on the Standard toolbar, click the New Contact button.
2. Enter the new contact information, and then on the **Contact** tab, in the **Actions** group, click the **Save & Close** button.

**To edit a contact record**

1. In the **Contacts** pane, double-click the contact record to open it, and then edit or add information to the record.

2. On the **Contact** tab, in the **Actions** group, click the **Save & Close** button.

**To assign contact records to color categories**

1. In the **Contacts** pane, double-click the contact record you want to assign to a category.

2. On the **Contact** tab, in the **Options** group, click the **Categorize** button, and click a category. Then in the **Actions** group, click the **Save & Close** button.

   Or

   On the **Options** tab, click the **Categorize** button, and click All Categories to display the **Color Categories** dialog box. Then in the Name list, select any pertinent check boxes, and click OK.

**To create a distribution list**

1. In the **New** list, click **Distribution List**.

2. In the **Name** box, type a name for your list, and then in the **Members** group, click the **Select Members** button.

3. If the **Select Members** dialog box is displaying an address book other than your Contacts list, in the **Address Book** list, under **Outlook Address Book**, click **Contacts**.

4. In the **Name** list, click the names of the people you want to include, click the **Members** button, and then click **OK**.

5. On the **Contact** tab, in the **Actions** group, click the **Save & Close** button.

**To modify a business card**

1. In the **Contacts** pane, double-click the contact record to open it.

2. On the **Contact** tab, in the **Options** group, click the **Business Card** button.

3. In the **Card Design** area of the **Edit Business Card** dialog box, click **Background Color**.

4. In the **Color** dialog box, click a color you like, and then click **OK**.

5. To add or change an image, in the **Card Design** area, to the right of **Image**, click **Change**. Then browse to the folder containing the image, click the image, and click **OK**.

6. In the **Image Area** box, type or select the image area size.

7. In the **Image Align** list, click a type of alignment, and then click **OK**.
To share one or more address books with other people on your network

1. In the Contacts module Navigation Pane, under My Contacts, right-click the address book you want to share, and then click Share. Or if you want to share all your address books, in the Navigation Pane, click Share My Contacts folder.

2. In the To box of the Sharing invitation message, enter the names of people or distribution lists on your network with whom you want to share the address book.

3. If you are sharing your primary address book and want to request reciprocal permission, select the Request permission to view recipient’s Contacts folder check box. If you are sharing a secondary address book and want to give the recipient full access, select the Recipient can add, edit, and delete items in this contacts folder check box.

4. Click Send.

To create a contacts folder

1. Display the Contacts module. Then in the New Contact list, click Folder.

2. In the Name box of the Create New Folder dialog box, type a name by which you want to identify the folder.

3. In the Folder contains list, click the type of folder you want to create.

4. In the Select where to place the folder list, click a location for the folder, and then click OK.

To export an address book

1. On the File menu, click Import and Export.

2. In the Choose an action to perform list, click Export to a file, and then click Next.

3. In the Create a file of type list, click Personal Folder File (.pst), and then click Next.

4. In the Select the folder to export from list, click the contacts folder you want to export, and then click Next.

5. Click Browse to the right of the Save exported file as box. Then In the Open Personal Folders dialog box, select the location where you want to save the file.

6. Type the file name, click OK, and then click Finish.

To sort contact records

- Click a column heading to sort the contact records in ascending order based on the column. Click the column heading again to reverse the sort.

To change how you view contact records

- Select an option from the Current View list.

To locate a contact record by using Instant Search

- At the top of the Contacts pane, click the Search box, and then type a search word.
To return to previous search results, at the right end of the Search box, click the Show Instant Search Pane Menu button, point to Recent Searches, and then select the search you want to use from the list.

To print a phone list
1. Display the Contacts module in Phone List view.
2. On the Standard toolbar, click the Print button. Then in the Print range area of the Print dialog box, ensure that the All rows option is selected, and click OK.

To print an address card for a contact
1. Display the Contacts module in Address Cards view.
2. In the Contacts pane, click the contact record for which you want to print a card.
3. On the Standard toolbar, click the Print button.
4. In the Print dialog box, scroll the Print style list and click Card Style.
5. Under Print range, click Only selected items, and then click OK.

To print address cards for multiple contacts
1. In the Contacts pane, click a contact record to select it.
2. Hold down the ctrl key, and then click other contact records to add them to the selection.
3. On the Standard toolbar, click the Print button.
4. In the Print style list, be sure that Card Style is selected. Then in the Print range area, click Only selected items, and click OK.

To link one or more contact records to Microsoft Office OneNote
1. In the Contacts pane, select the contact record (or records) you want to link. Then on the Standard toolbar, click the Open or create linked contact notes in OneNote button.

3 Sending E-Mail Messages

To check addresses
1. If a message recipient’s address is in your address book, type the person’s name and either wait for Outlook to validate the name or press ctrl + K to immediately validate it.

To have Outlook search additional address books
1. On the Tools menu, click Address Book. Then in the Address Book window, on the Tools menu, click Options.
2. In the Addressing dialog box, click Add.
3. In the Add Address List dialog box, click the address list you want to add, click Add, and then click Close.

4. In the Addressing dialog box, click OK, and then in the Address Book window, click the Close button.

To send a courtesy copy of a message

➔ In the message window, enter an e-mail address in the Cc or Bcc box.

To display the Bcc field in an outgoing message

➔ In the message window, on the Options tab, in the Fields group, click the Show Bcc button.

To compose and send a new e-mail message

1. On the Standard toolbar, click the New Mail Message button.
2. In the To box of the message window, type an e-mail address.
3. In the Subject box, enter the main idea of your message.
4. In the message content area, type the body of the message.
5. When you finish, click Send.

To recall a message

1. In the Sent Items folder, open the message you want to recall.
2. On the Message tab, in the Actions group, click the Other Actions button, and then click Recall This Message.
3. Select the option to delete unread copies of the message or to replace them with a new message, and then click OK.

To attach a file to an e-mail message

1. Display the message window.
2. On the Message tab, in the Include group, click the Attach File button (not the arrow under the button).
3. Browse to the file you want to attach, click it, and then click Insert.

To send a business card

1. Display the message window.
2. On the Message tab, in the Include group, click the Insert Business Card button, and then in the list, click Other Business Cards.
3. In the Insert Business Card dialog box, select the card or cards you want to send, and then click OK.

To create a SmartArt diagram within an e-mail message

1. Click to place the insertion point in the message content area.
2. On the Insert tab, in the Illustrations group, click the SmartArt button.
3. In the SmartArt gallery, click the diagram you want to create, and then click OK.

To format the text of an e-mail message
→ In the message content area, select the text you want to format. Then do one of the following:
   ○ Click formatting buttons on the Mini toolbar.
   ○ Click formatting buttons in the Basic Text group on the Message tab.

To apply a different theme to an outgoing e-mail message
1. In the message window, on the Options tab, in the Themes group, click the Themes button.
2. In the Themes gallery, click the theme you want.

To create a signature and insert it in all the new messages
2. On the E-mail Signature tab of the Signatures and Stationery dialog box, click New.
3. In the New Signature dialog box, type a name for the signature, and then click OK.
4. In the signature content area, type a salutation, such as Regards, and a comma. Press the [Enter] key once or twice, and then type your name.
5. Add any other information you want to include, such as a telephone number, legal disclaimer, or link to your organization's Web site, and format the text and paragraphs the way you want them to appear in messages.
6. In the Choose default signature area of the Signatures and Stationery dialog box, in the New messages list, click the name you gave your signature. Then click OK twice.

4 Handling E-Mail Messages

To mark messages as read after previewing them in the Reading Pane
1. On the Tools menu, click Options. On the Other tab of the Options dialog box, in the Outlook Panes area, click Reading Pane.
2. In the Reading Pane dialog box, select the check box corresponding to the way you want Outlook to handle messages viewed in the Reading Pane, and then click OK twice.

To manually mark an e-mail message as read or unread
→ Right-click the message, and then click Mark As Read or Mark As Unread.
To preview and open a message attachment

1. In the Reading Pane, point to the Message button below the message header, and then point to the attachment to preview its name, type, and size.
2. Click the attachment, and then click the Preview file button.
3. In the Reading Pane, double-click the attachment. If Outlook prompts you to confirm that you want to open the file, click the Open button.

To reply to or forward messages

➜ In the message window, on the Message tab, in the Respond group, click the Reply, Reply to All, or Forward button.

To instruct Outlook to close original messages after you respond to them

1. On the Tools menu, click Options. On the Preferences tab, of the Options dialog box, click E-mail Options.
2. In the E-mail Options dialog box, select the Close original message on reply or forward check box, and then click OK twice.

To customize your desktop alert settings

1. On the Tools menu, click Options. On the Preferences tab of the Options dialog box, click E-mail Options.
2. In the E-mail Options dialog box, click Advanced E-mail Options.
3. In the Advanced E-mail Options dialog box, click Desktop Alert Settings.
4. In the Desktop Alert Settings dialog box, set the duration and transparency as you want, previewing your changes as necessary. When you finish, click OK in each of the open dialog boxes.

To customize where you want desktop alerts to appear

1. On the Tools menu, click Options. On the Preferences tab of the Options dialog box, click E-mail Options.
2. In the E-mail Options dialog box, click Advanced E-mail Options.
3. In the Advanced E-mail Options dialog box, click Desktop Alert Settings.
4. Click Preview, drag the sample desktop alert to where you want it to appear on the screen, and then click OK.

To turn off desktop alerts

1. On the Tools menu, click Options. On the Preferences tab of the Options dialog box, click E-mail Options.
2. In the E-mail Options dialog box, click Advanced E-mail Options.
3. In the **Advanced E-mail Options** dialog box, clear the **Display a New Mail Desktop Alert** check box, and then click **OK**.

**To quickly access the Desktop Alert Settings dialog box**

👉 When a desktop alert appears on your screen, click the **Options** button in the alert, and then click **Desktop Alert Settings**.

**To mark a message as read through its desktop alert**

👉 When a desktop alert appears on your screen, point to it to keep it active, click its **Options** button, and then click **Mark as Read**.

**To delete a message through its desktop alert**

👉 When the desktop alert appears on your screen, point to it, and then click its **Delete Item** button.

**To specify a task due date other than the default when you flag a message**

👉 In the Inbox, right-click the flag in the message header, and then click the due date.

Or

1. Right-click the flag, and then click **Set Quick Click**.
2. In the **Set Quick Click** dialog box, click the due date you want, and then click **OK**.

**To create a task from an e-mail message**

👉 In the Inbox, click the transparent flag at the right end of the message header.

**To create an appointment based on a message**

👉 Drag the message from your Inbox, and drop it on the **Calendar** button at the bottom of the Navigation Pane.

**To convert an appointment to an event**

👉 Open the appointment, and then select the **All day event** check box.

**To convert an appointment to a meeting**

1. Open the appointment.
2. On the **Appointment** tab, in the **Actions** group, click **Invite Attendees**.
3. In the **To** box that appears, type the e-mail addresses of the people you want to invite. Then click **Send**.

**To set up a message for printing**

1. In the message window, click the **Microsoft Office Button**, point to the **Print** arrow, and then click **Print Preview**.
2. In the **Print Preview** window, click the **Page Setup** button.
3. In the **Page Setup: Memo Style** dialog box, click the **Paper** tab to view and change the available options.

4. Click the **Header/Footer** tab, and then type the text you want to appear in the header and footer of the message.

5. To print the message, click **Print**.

5 **Managing Your Inbox**

**To use Instant Search to locate a specific message**
- In the **Search** box at the top of the Inbox, type a word contained in the message.
- To refine the search, click the **Expand the Query Builder** button to the right of the **Search** box, and supply additional information.
- To expand the search to include all the folders in your mailbox, at the bottom of the Search Results pane, click **Try searching again in All Mail Items**.
- To remove the search filter and view all messages, click the **Clear Search** button.

**To change the display, arrangement, sort order, and grouping of messages**
- On the **View** menu, point to **Arrange By**, and then click the command you want; or
- Click the column heading on which you want to sort messages. Click it again to reverse the order.

**To expand or collapse groups**
- On the **View** menu, point to **Expand/Collapse Groups**, and then click the collapse or expand view you want.

**To filter the Inbox content**
- On the **View** menu, point to **Current View**, and then click the view you want. Click **Messages** on the **Current View** list to remove the filter.

**To add and remove fields**
1. On the **View** menu, point to **Current View**, and then click **Customize Current View**.
2. In the **Customize View** dialog box, click the **Fields** button.
3. To add fields, in the **Available fields** list of the **Show Fields** dialog box, click the fields you want to add, and then click **Add**.
4. To remove fields in any list view, drag the column heading downward, and release the mouse button when a large black X appears over the heading.

**To change the order of columns in any view**
- Drag the column headings to the locations you prefer.
To restore the default Inbox settings

1. On the View menu, point to Current View, and then click Define Views.
2. In the Custom View Organizer dialog box, click Reset. In the Microsoft Office Outlook message box asking whether you want to reset the current view to its original settings, click OK.
3. Reset any customized views you want by clicking the view name and then clicking Reset. When you finish, click the Messages view, and then click Apply View.

To create a custom Search Folder

1. In the Navigation Pane, right-click the Search Folders folder, and then click New Search Folder.
2. In the New Search Folder dialog box, scroll the Select a Search Folder list to see the available options, click the option you want, and then click OK.

To make changes to the contents of an existing Search Folder

➜ Right-click the folder, and then click Customize this Search Folder.

To display the default color categories

➜ In the Inbox, click a message you want to categorize, and then on the Standard toolbar, click the Categorize button.

To rename categories

1. On the Standard toolbar, click the Categorize button, and in the Category list, click All Categories.
2. In the Color Categories dialog box, click the category (not the check box), and then click Rename.
3. Type the name you want, and then press Enter.

To change the color associated with a category

1. On the Standard toolbar, click the Categorize button, and in the Category list, click All Categories.
2. In the Color Categories dialog box, click the category you want.
3. In the Color palette, click the icon of the color you want.

To create categories

1. On the Standard toolbar, click the Categorize button, and in the Category list, click All Categories.
2. In the Color Categories dialog box, click New.
3. In the Name box of the Add New Category dialog box, type the name you want to give the category. Then if you want, assign a color and a shortcut key.
To sort the Inbox contents by category
1. At the top of the Inbox, click the Arranged By bar, and then click Categories.
2. To the right of the Arranged By bar, click the command you want.

To create a folder
1. On the Standard toolbar, in the New list, click Folder.
2. In the Name box of the Create New Folder dialog box, type the folder name, and then click OK.

To move messages to a folder
   ➜ Drag the message to the desired folder in the Navigation Pane.
   Or
1. Right-click the message, and then click Move to Folder.
2. In the Move Items dialog box, in the Move the selected items to the folder list, click the folder where you want to move the message, and then click OK.

To send the content of an e-mail message to OneNote
   ➜ Select the message, and then on the Standard toolbar, click the Send selected e-mail to OneNote button.

To set the default automatic archive options
1. On the Tools menu, click Options. On the Other tab of the Options dialog box, click AutoArchive.
2. Make the changes you want to your AutoArchive settings, then click OK in each of the open dialog boxes.

To manually archive a folder
1. Click the folder you want to archive. Then on the File menu, click Archive.
2. In the Archive dialog box, click Archive this folder and all subfolders, and then click OK.

To set the archive options for an individual folder
1. Right-click the folder in the Navigation Pane, and then click Properties.
2. On the AutoArchive tab of the Properties dialog box, set the archive options you want, and then click OK.

6 Managing Appointments, Events, and Meetings

To schedule an appointment
1. In the Calendar, display the date on which you want to schedule an appointment.
2. Click the desired time slot, type information about the appointment, and then press Enter.

3. To change the end time for the appointment, drag the bottom border of the time slot down to the bottom of the end time.

To reschedule an appointment
→ Drag the appointment to a different time slot on the calendar.

To make an appointment recurring
1. Open the appointment. Then on the Appointment tab, in the Options group, click the Recurrence button.
2. In the Recurrence pattern area of the Appointment Recurrence dialog box, click the option that corresponds to the desired recurrence, and then click OK.
3. On the Recurring Appointment tab, in the Actions group, click the Save & Close button.

To schedule an event
1. In the Date Navigator, click the date on which you want to schedule an event, and then in the Calendar pane, click the blank space below the day header and above the time slots.
2. Type the name of the event, and then press Enter.

To make an event recurring
1. Double-click the event, and then on the Event tab, in the Options group, click the Recurrence button.
2. In the Recurrence pattern area of the Appointment Recurrence dialog box, click the option that corresponds to the recurrence you want, and then click OK.
3. On the Recurring Event tab, in the Actions group, click the Save & Close button.

To create and send a meeting request
1. In the Date Navigator, click the date on which you want the meeting to occur.
2. On the Standard toolbar, in the New Appointment list, click Meeting Request.
3. In the To box, type the e-mail addresses of the meeting attendees; in the Subject box, type the name of the meeting; and in the Location box, indicate where the meeting will take place.
4. On the Meeting tab, in the Show group, click the Scheduling button. Then set the meeting time, and click Send.

To manually respond to a meeting request
1. In the Date Navigator, double-click the scheduled meeting.
2. In the meeting request window, in the Reading Pane, click Accept, Tentative, or Decline.

3. Choose whether to send a standard response, a personalized response, or no response at all.

To propose a new time for a meeting
1. In the Reading Pane of the meeting request window, click Propose New Time.
2. In the schedule area of the Propose New Time dialog box, set the proposed meeting start and end times, and then click Propose Time.
3. In the meeting response window that opens, enter a message to the meeting organizer, and then click Send.

To instruct Outlook to automatically respond to meeting requests
1. On the Tools menu, click Options. On the Preferences tab of the Options dialog box, click Calendar Options.
2. In the Calendar Options dialog box, click Resource Scheduling.
3. In the Resource Scheduling dialog box, select the Automatically accept meeting requests and process cancellations check box.
4. Select the Automatically decline conflicting meeting requests and/or the Automatically decline recurring meeting requests check boxes if you want Outlook to do this.
5. Click OK in each of the open dialog boxes.

7 Managing Your Calendar

To add the holidays of other countries to your calendar
1. On the Tools menu, click Options. On the Preferences tab of the Options dialog box, click Calendar Options.
2. In the Calendar Options dialog box, click Add Holidays.
3. In the Add Holidays to Calendar dialog box, select the check boxes of the countries whose holidays you want to add, and then click OK in each open dialog box.

To remove holidays from your calendar
1. In Calendar view, on the View menu, point to Current View, and then click All Appointments.
2. On the View menu, point to Current View, and click Customize Current View. Then in the Customize View dialog box, click Group By.
3. In the Group By dialog box, clear the Automatically group according to arrangement check box if it is selected. Then in the Group items by list, click Location.
4. Ensure that all the **Then by** lists display (none), and then click **OK** in each of the open dialog boxes.

5. In the **Calendar** pane, collapse the displayed groups or scroll the pane until the **Location** group of the holidays you want to remove is visible. Then do one of the following:

   - To remove a specific holiday, click it, and then press **Delete**.
   - To remove all the holidays of the displayed country, click the **Location** group header, and then press **Delete**. If a **Microsoft Office Outlook** message box warns you that this action will apply to all items in the selected group, click **OK**.

**To change your work week**

1. Display your calendar in **Week** view, and at the top of the **Calendar** pane, click **Show work week**.

2. On the **Tools** menu, click **Options**. On the **Preferences** tab of the **Options** dialog box, click **Calendar Options**.

3. In the **Calendar work week** area of the **Calendar Options** dialog box, select or clear the check boxes of the days of the week.

4. Set the start and end times, and then click **OK** in the open dialog boxes.

**To change the time zone**

1. On the **Tools** menu, click **Options**. On the **Preferences** tab of the **Options** dialog box, click **Calendar Options**.

2. In the **Calendar Options** dialog box, click **Time Zone**.

3. In the **Time Zone** list, click the time zone you want. Then click **OK** in each of the open dialog boxes.

**To simultaneously display two time zones in your Calendar**

1. On the **Tools** menu, click **Options**. On the **Preferences** tab of the **Options** dialog box, click **Calendar Options**.

2. In the **Calendar Options** dialog box, click **Time Zone**.

3. In the **Time Zone** dialog box, select the **Show an additional time zone** check box. Then in the second **Time zone** list, click the additional time zone you want to display.

4. Type a label for each time zone in its corresponding **Label** box, and then click **OK** in each of the open dialog boxes.

**To preview and print your calendar**

1. On the **View** menu, click **Day**.

2. On the Standard toolbar, click the **Print** button. Then in the **Print** dialog box, click **Preview**.

3. On the **Print Preview** toolbar, click the **Print** button to redisplay the **Print** dialog box.
4. In the **Print style** list, click the style of printing you want.

5. In the **Print range** area, set the first and last dates you want to print, and then click **OK**.

**To save calendar information as a Web page**

1. Display your calendar, and then on the **File** menu, click **Save as Web Page**.

2. In the **Save as Web Page** dialog box, enter the start and end dates for which you want to publish calendar information.

3. In the **Options** area, select whether to include appointment details or a background graphic.

4. In the **Save as** area, append a file name (the extension is unnecessary) at the end of the path shown in the **File name** box. If you want, change the title that will be displayed on the Web page and the location where Outlook saves it.

5. With the **Open saved web page in browser** check box selected, click **Save**.

**To embed information about your schedule in an e-mail message**

1. Display your calendar, and then in the **Navigation Pane**, under **Other Calendars**, click **Send a Calendar via E-mail**.

2. In the **Send a Calendar via E-mail** dialog box, in the **Date Range** list, click the command you want.

3. In the **Detail** list, click the option you want.

4. Click **Advanced**, set any options you want, and then click **OK**.

**To link one or more calendar entries to OneNote**

- Select the calendar item (or items) you want to link. Then on the Standard toolbar, click the **Open or create linked notes in OneNote** button.

**To link to an Internet calendar**

1. In the **Calendar** module **Navigation Pane**, scroll the **All Calendar Items** list to the **Other Calendars** section, and then click **Search Calendars Online**.

2. On the **Internet Calendars** page, scroll to the **Subscribe to a Free Internet Calendar** section, and then click the Internet calendar you want.

3. If an **Internet Explorer Security** message box prompts you to allow Outlook to open Web content, click the **Allow** button.

4. In the **Microsoft Office Outlook** message box asking whether you want to add the calendar to Outlook and subscribe to updates, click **Yes**.

**To view multiple calendars side by side and as a composite**

1. In either the **My Calendars** or **Other Calendars** list in the **Navigation Pane**, select the check box for at least one other calendar.
2. On the title bar tab of a secondary calendar, click the View in Overlay Mode button.

3. Click either Calendar tab to display that calendar on top of the other calendar.

4. On either of the overlaid calendars, click the View in Side-By-Side Mode button to return to the standard display.

To delegate control of your calendar so that meeting requests can be created and responded to on your behalf


2. In the Add Users dialog box, click the person you want to delegate control to, click Add, and then click OK.

3. In the Delegate Permissions dialog box, in the Calendar list, click the level of permission you want to delegate.

4. Select the Automatically send a message to delegate summarizing these permissions check box, and then click OK in each of the open dialog boxes.

8 Tracking Tasks

To create a folder that can contain tasks

1. On the Standard toolbar, in the New list, click Folder.

2. In the Create New Folder dialog box, enter the name and select the location of the folder.

3. In the Folder contains list, click Task Items, and then click OK.

To create a task

→ On the To-Do Bar, click the Type a new task box, type a description of your task, and then press [Enter].

To update a task

● To assign a completion time, in the To-Do Bar Task List, right-click the flag following the task, and then click the timeframe you want.

● To assign the task to a category, right-click the Category bar following the task, and then click the category you want.

● To change the task text, double-click the task in the Tasks pane, and in the content pane, type the new text. Then save and close the task.

● To change the status, double-click the task in the Tasks pane, and in the Status list, click the option that applies to the task. Then in the % Complete box, change the completion percentage of the task, and save and close the task.
To delegate a task to another Outlook user
1. On the To-Do Bar, double-click the task you want to delegate.
2. In the task window, on the Task tab, in the Manage Task group, click the Assign Task button.
3. In the To box that appears, type the e-mail address of the person you want to assign the task to.
4. If you want Outlook to display a reminder for the task, in the Options group, click the Follow Up button.
5. Click Send. If a message box appears to notify you that the task reminder has been turned off, click OK.

To update the status of tasks assigned to you by other people
- To change the percentage of the project you estimate as complete, open the task, and then in the % Complete list, type or select (by clicking the arrows) the percentage.
- To manually change the task status, open the task, and then in the Status list, click the status you want.

To send a status report about a task
1. In the Tasks pane, double-click the task, and then on the Task tab, in the Manage Task group, click the Send Status Report button.
2. Address the message to the people you want to send the report to, and click Send.

To mark a task as complete
➔ In the Tasks pane, double-click the task, and then on the Task tab, in the Manage Task group, click the Mark Complete button.

To stop a reminder from appearing
1. In the To-Do Bar Task List, right-click the task, point to Follow Up, and then click Add Reminder.
2. Clear the Reminder check box, and then click OK.

To delete a task
➔ In the To-Do Bar Task list, click the task, and then press [Del].

9 Gathering Information

To subscribe to an RSS feed
1. In the Navigation Pane, under your primary mailbox, click the RSS Subscriptions folder.
2. On the Outlook Syndicated Content (RSS) Directory page, click the feed you want to subscribe to.
3. In the Microsoft Office Outlook message box asking whether to add the RSS feed to Outlook, click Yes.

To remove an RSS feed
1. On the Tools menu, click Account Settings.
2. In the Account Settings dialog box, click the RSS Feeds tab.
3. In the Feed Name list, click the name of the feed you want to remove.
4. Click Remove. Then in the Microsoft Office Outlook message box asking whether to remove the RSS feed from Outlook, click Yes.

To change the default note color, size, or font
1. On the Tools menu, click Options. On the Preferences tab of the Options dialog box, click Note Options.
2. Change the settings you want, and then click OK twice.

To create a note
1. In the Notes pane, on the Standard toolbar, click the New Note button.
2. Type the note title, press Enter, type the note text, and then click the Close button.

To link a note to a contact
1. Open a note in the Notes pane, click the Note icon in its upper-left corner, and then click Contacts.
2. In the Contacts for Note dialog box, click Contacts.
3. In the Select Contacts dialog box, with Contacts selected in the Look in list, click the contact you want to link to in the Items list. Then click OK.
4. In the Contacts for Note dialog box, click Close. Then close the note.

To access a note from a contact record
1. In the Contacts pane, open the contact record. Then on the Contact tab, in the Show group, click the Activities button.
2. In the Show list, click Notes.

To display the Journal
→ On the Go menu, click Journal.

To add the Journal button to the Navigation Pane
1. In the lower-right corner of the Navigation Pane, click the Configure buttons button.
2. Point to Add or Remove Buttons, and then click Journal.
To record activities automatically


2. In the Journal Options dialog box, in the Automatically record these items box, select the check boxes for the activities you want to record.

3. In the For these contacts box, select the check boxes for the contacts whose items you want to record.

4. In the Also record files from box, select the check boxes for the programs whose files you want to record, and then click OK in the open dialog boxes.

To forward a note

1. Right-click a note in the Notes pane, and then click Forward.

2. In the To box, type the e-mail address of the person you want to send the note to, and then click Send.

To save a note as a file

1. Open the note, click its Note icon, and then click Save As.

2. In the Save As dialog box, browse to the folder where you want to save the file.

3. In the Save as type list, click the file type you want to create.

4. In the File name box, change the file name if you want it to be something other than the current note title, and then click Save.

To open a received note

1. In your Inbox, click the message with the note attached to it.

2. In the Reading Pane, right-click the attached note, and then click Open.

10 Collaborating with Other People

To allow another person on your Exchange Server network to access a folder

1. In the Navigation Pane, right-click the folder, and then click Change Sharing Permissions.

2. On the Permissions tab of the Properties dialog box, click Add.

3. In the Add Users dialog box, double-click the name of the person with whom you want to share this folder, and then click OK.

4. With the person’s name selected on the Permissions tab, in the Permission Level list, click the level you want.

5. In the Properties dialog box, click Apply.
To create a document workspace from a message

1. In a new message window, enter the addresses of the people you want to invite to the document workspace and a subject.

2. On the Message tab, in the Include group, click the Attach File button. Then in the Insert File dialog box, browse to and select the file(s) you want to share through a document library, and click Insert.

3. Click the Include dialog box launcher. Then under Send attachments as in the Attachment Options task pane, click Shared attachments.

4. In the Create Document Workspace at box, enter the address of your collaboration site, and then press the Tab key.

5. Send the message invitation that appears in the content area.

To create a group schedule

1. Display your calendar, and then on the Actions menu, click View Group Schedules.

2. In the Group Schedules dialog box, click New. In the Create New Group Schedule dialog box, type a name for the schedule, and then click OK.

3. In the scheduling window, add members to the group by clicking in the Group Members list and then typing a name or an e-mail alias, or by clicking Add Others and then selecting group members from your address book.

To get a local copy of document library contents

1. On your organization’s collaboration site, display the document library.

2. On the Actions menu, click Connect to Outlook. If an Internet Explorer Security alert appears, click Allow.

3. In the Microsoft Office Outlook message box asking you to confirm that you want to connect the SharePoint document library to Outlook, click Yes. If a Connect dialog box appears, prompting you for your site credentials, enter your user name and password, and then click OK.

4. To preview downloaded items, click them; to open a read-only version of an item, double-click it.

11 Working Away from Your Office

To configure Outlook to connect to an Exchange account by using the Outlook Anywhere feature

1. On the Tools menu, click Account Settings.

2. On the E-mail tab of the Account Settings dialog box, in the Name list, click your Microsoft Exchange account, and then click Change.

3. In the Change E-mail Account dialog box, click More Settings.
4. In the Microsoft Exchange dialog box, click the Connection tab.

5. In the Outlook Anywhere area, select the Connect to Microsoft Exchange using HTTP check box.

6. Click the Exchange Proxy Settings button that becomes active.

7. In the Microsoft Exchange Proxy Settings dialog box, in the Connection settings area, in the https:// box, type your organization’s Exchange proxy address.

8. Click OK in the Microsoft Exchange Proxy Settings dialog box and the Microsoft Exchange dialog box. Then in the message box that appears, click OK to acknowledge that the change will not take effect until you restart Outlook.

9. In the Change E-mail Account dialog box, click Next, and then click Finish.

10. Close the Account Settings dialog box, and then exit and restart Outlook.

11. In the Connect to dialog box, enter your user name and password, and click OK.

To set up a VPN connection from a computer running Windows Vista

1. In the right pane of the Start menu, click Connect To.

2. In the Connect to a Network dialog box, click Set up a connection or network.

3. Scroll the Choose a connection option list, click Connect to a workplace, and then click Next.

4. Under Do you want to use a connection that you already have?, click No, create a new connection, and then click Next.

5. Under How do you want to connect?, click Use my Internet connection (VPN).

6. Under Type the Internet address to connect to, type the Internet address you want to connect to in the Internet address box. In the Destination name box, type a name for the VPN connection, select any options that you want, and then click Next.

7. Under Type your user name and password, type your user name and password (the domain name is optional), and then click Connect.

To set up a VPN connection from a computer running Windows XP

1. On the Start menu, if the Connect To menu appears on the right side, click Connect To, and then click Show all connections. Otherwise, open Control Panel in Classic view, and then click Network Connections.

2. In the Network Connections window, on the Network Tasks menu, click Create a new connection.

3. On the first page of the New Connection wizard, click Next.

4. On the Network Connection Type page, click Connect to the network at my workplace, and then click Next.
5. On the Network Connection page, click Virtual Private Network connection, and then click Next.

6. In the Company Name box, type a name by which you will identify the connection. Then click Next.

7. If the wizard displays the Public Network page, click Do not dial the initial connection to indicate that you will always connect to the Internet before starting the VPN connection. Then click Next.

8. On the VPN Server Selection page, type the URL of your organization’s VPN server in the Host name box, and then click Next.

9. If your system includes a SmartCard reader, the wizard displays the Smart Cards page. If you don’t need to use your SmartCard to log in to this particular connection, click Do not use my smart card, and then click Next.

10. On the Connection Availability page, click My use only, and then click Next.


12. In the User name box of the Connect dialog box, type your domain\username, and in the Password box, type your domain password.

13. Select the Save this user name check box and the Me only or Everyone option. Then click Connect.

To make the contents of a folder available for offline use

→ In the Navigation Pane, click the folder. On the Tools menu, point to Send/Receive, point to Send/Receive Settings, and then click Make This Folder Available Offline.

To manually update your offline address book

1. On the Tools menu, point to Send/Receive, and then click Download Address Book.

2. In the Offline Address Book dialog box, with the Download changes since last Send/Receive check box selected, click Full Details, and then click OK.

To configure Outlook to automatically reply to incoming messages


2. In the Out Of Office Assistant dialog box, click I am currently Out of the Office.

3. In the AutoReply only once to each sender with the following text box, type the text of the auto-reply message you want to send, click OK, and then click the notification to close it.

To set up a rule to auto-forward messages to another e-mail address

2. In the **Out of Office Assistant** dialog box, click **Add Rule**. Then in the **Edit Rule** dialog box, click **Advanced**.

3. In the **Received** area, specify the start date, end date, or any date range you want.

4. To set the importance of the message, select the **Importance** check box, click the option you want in the **Importance** list, and then click **OK**.

5. In the **Edit Rule** dialog box, under **Perform these actions**, select the **Forward** check box. Then in the **To** box, type the e-mail address to which you want to forward messages.

6. In the **Method** list, click the forwarding option you want. Then click **OK**.

**To turn off Out Of Office auto-reply messages**

→ Click the **Out of Office** icon on the status bar, and then click **Turn off Out of Office auto-replies**.

**To automatically reply to messages during a future time period (applies only to Exchange Server 2007 accounts)**

1. On the **Tools** menu, click **Out Of Office Assistant**.

2. In the **Out of Office Assistant** dialog box, click **Send Out of Office auto-replies**.

3. Select the **Only send during this time range** check box. Then set the **Start time** and **End time** settings as you want.

4. On the **Inside My Organization** tab, in the message box, type the text of the message you want to send, and then click **OK**.

**To send a different auto-reply message to people outside your organization (applies only to Exchange Server 2007 accounts)**

1. Display the **Out Of Office Assistant** dialog box, and click the **Outside My Organization** tab.

2. Click **Anyone outside my organization**.

3. In the message box, type the text of the message you want to send to people outside your organization, and then click **OK**.

---

## 12 Customizing and Configuring Outlook

**To add a button to the Quick Access Toolbar**

1. At the right end of the **Quick Access Toolbar**, click the **Customize Quick Access Toolbar** button, and then click **More Commands**.

2. In the **Editor Options** window, on the **Customize** page, in the **Choose commands from** list, click the tab from which you want to choose a command.
3. In the tab’s command list, click a command you want to add to the toolbar, and then click Add.

4. Click the Move Up and Move Down buttons to position the command where you want on the toolbar, and then at the bottom of the Customize page, click OK.

To customize Outlook

1. Click the Microsoft Office Button, and then in the lower-right corner of the Office menu, click Editor Options.

2. In the Editor Options window, in the page list in the left pane, click the page you want, make your changes, and then click OK to save your changes.

To add a button to a toolbar

1. Click the Toolbar Options button at the right end of any toolbar, point to Add or Remove Buttons, and then click Customize.

2. In the Customize dialog box, click the Commands tab. In the Categories list, click the category containing the command you want to add.

3. In the Commands list, locate the command you want to add. Then drag the command from the list to the position where you want it to appear on the toolbar.

To rearrange the commands on a toolbar

1. Click the Toolbar Options button, point to Add or Remove Buttons, and then click Customize.

2. In the Customize dialog box, on the Commands tab, click Rearrange Commands.

3. In the Rearrange Commands dialog box, under Choose a menu or toolbar to rearrange, click Toolbar. Then in the Toolbar list, select the toolbar or menu bar you want to rearrange.

4. In the Controls list, click the command you want to reposition, click Move Up or Move Down as many times as necessary to position the command where you want it, and then click Close.

To remove a custom button from a toolbar

1. Click the Toolbar Options button, point to Add or Remove Buttons, and then click Customize.

2. In the Customize dialog box, on the Commands tab, click Rearrange Commands.

3. In the Rearrange Commands dialog box, under Choose a menu or toolbar to rearrange, click Toolbar, and then in the list, click the toolbar containing the button you want to remove.

4. In the Controls list, click the button you want to remove. Click Delete, and then click Close.
To reset a toolbar to its default state
1. Click the Toolbar Options button, point to Add or Remove Buttons, and then click Customize.
2. In the Customize dialog box, on the Toolbars tab, click the toolbar you want to restore to its default settings, and then click Reset.

To create a rule to process incoming messages that meet specific criteria
2. In the Rules wizard, in the Select a template list, under Start from a blank rule, click Check messages when they arrive, and then click Next.
3. In the Select condition(s) list, select the conditions you want to apply to your new rule.
4. In the Edit the rule description box, click the underlined term specific words.
5. In the Search Text dialog box, in the Specify words or phrases to search for in the subject box, type the words you want to search for, click Add, and click OK. Then in the Rules wizard, click Next.
6. Scroll the Select action(s) list to review and select the actions Outlook can perform on incoming items meeting the criteria you specify, and click OK. Then in the Rules wizard, click Next.
7. Select any exceptions you want to set for your rule, and then click Next.
8. Select the Run this rule now on messages already in “Inbox” check box, and click Finish. Then in the Rules and Alerts dialog box, click OK.

To create a Personal Folders file
1. On the File menu, point to New, and then click Outlook Data File.
2. If you run Microsoft Outlook 2002 or an earlier version on a different computer and you might want to open this Personal Folders file in that version, click Outlook 97-2002 Personal Folders File in the New Outlook Data File dialog box. Otherwise, select Office Outlook Personal Folders File, and then click OK.
3. In the Create or Open Outlook Data File dialog box, in the Favorite Links list, click the type of link you want.
4. In the File name box, type the name of your personal folder file, and then click OK.
5. In the Create Microsoft Personal Folders dialog box, replace the suggested name with a new name or accept it, and click OK.

To move messages or folders to your Personal Folders file
1. In the Navigation Pane, expand the Inbox to display its folder list.
2. Drag the messages or folders from your Inbox to your personal folder.
To copy messages and folders to your Personal Folders file

1. In the Navigation Pane, expand the Inbox to display its folder list.
2. Hold down the right mouse button, and drag the messages or folders from your Inbox to your personal folder. When you release the mouse button, click Copy.

To open and close data files from within Outlook

1. On the File menu, point to Open, and then click Outlook Data File.
2. In the Open Outlook Data File dialog box, browse to the location of your data file, and then double-click it.

To digitally sign all outgoing messages

1. On the Tools menu, click Trust Center, and in the page list, click E-mail Security. Then on the E-mail Security page, select the Add digital signature to outgoing messages check box.
2. If all your message recipients don’t have Secure Multipurpose Internet Mail Extensions (S/MIME) security, select the Send clear text signed message when sending signed messages check box, and then click OK.

To obtain a digital ID to sign or encrypt documents and messages

1. On the Tools menu, click Trust Center, and then in the page list, click E-mail Security.
2. On the E-mail Security page, click Get a Digital ID.
3. On the Microsoft Office Marketplace Web page, click the link at the end of a provider’s description to display the provider’s Web site.
4. Follow the instructions on the Web site to register for a digital ID.

To export or import a digital ID

1. On the Tools menu, click Trust Center, and then in the page list, click E-mail Security.
2. On the E-mail Security page, click Import/Export.
3. In the Import/Export Digital ID dialog box, select whether you want to import or export your digital ID, fill in the information, and then click OK.

To digitally sign an individual e-mail message

→ On the Message tab, in the Options group, click the Digitally Sign Message button.

To encrypt all outgoing messages

1. On the Tools menu, click Trust Center, and then in the page list, click E-mail Security.
2. On the E-mail Security page, select the Encrypt contents and attachments for outgoing messages check box.
3. To receive verification that a message recipient received an encrypted message in its encrypted format, select the Request S/MIME receipt for all S/MIME signed messages check box, and then click OK.

To encrypt an individual message
   ➔ On the Message tab, in the Options group, click the Encrypt Message Contents and Attachments button.

To receive all messages in plain text format
   1. On the Tools menu, click Trust Center, and then in the page list, click E-mail Security.
   2. On the E-mail Security page, select the Read all standard mail in plain text check box, and then click OK.

To prevent message recipients from forwarding, printing, or copying a message
   ➔ With a message open, on the Message tab, in the Options group, in the Permissions list, click Do Not Forward.

To view the blocked content in an individual e-mail message
   ➔ In the message header, click the InfoBar, and then click Download Pictures.

To change the way Outlook handles external content
   1. On the Tools menu, click Trust Center, and then in the page list, click Automatic Download.
   2. Select the check boxes for the options you want, and then click OK.

To apply spam filtering options provided by the Junk E-Mail Filter
   1. On the Actions menu, point to Junk E-mail, and then click Junk E-mail Options.
   2. In the Junk E-mail Options dialog box, on the Options tab, select a level of protection.
   3. If you want Outlook to automatically delete suspected junk e-mail, select the Permanently delete suspected Junk E-mail instead of moving it to the Junk E-mail folder check box.
   4. Click the Safe Senders tab, add any e-mail addresses you want included in the Safe Senders List, or specify that e-mail received from a particular domain is safe.
   5. Click the Safe Recipients tab, and add any addresses or domains to your Safe Recipients List.
   6. Click the Blocked Senders tab, and add any addresses or domains to the Blocked Senders List.
   7. Click the International tab, and set options to block messages from country-specific domains or messages containing specific language text encoding, and then click OK.
To save message drafts more frequently

1. On the Tools menu, click Options. On the Preferences tab of the Options dialog box, click E-mail Options. Then in the E-mail Options dialog box, click Advanced E-mail Options.

2. In the Save messages area of the Advanced E-mail Options dialog box, select the AutoSave items every check box, and enter a number in the minutes box. Then click OK in each of the open dialog boxes.

To specify what happens when a message arrives

1. On the Tools menu, click Options. On the Preferences tab of the Options dialog box, click E-mail Options. Then in the E-mail Options dialog box, click Advanced E-mail Options.

2. In the Advanced E-mail Options dialog box, in the When new items arrive in my Inbox area, select the options for how you want to be notified when a new message arrives. Then click OK in each of the open dialog boxes.

To set options for sending messages

1. On the Tools menu, click Options. On the Preferences tab of the Options dialog box, click E-mail Options. Then in the E-mail Options dialog box, click Advanced E-mail Options.

2. In the Advanced E-mail Options dialog box, in the When sending a message area, set the options you want to apply to the messages you send. Then click OK in each of the open dialog boxes.
Chapter at a Glance

- Create a task or an appointment from a message, page 130
- View messages and message attachments, page 114
- Work with new mail notifications, page 126
In this chapter, you will learn to:

✔ View messages and message attachments.
✔ Reply to and forward messages.
✔ Work with new mail notifications.
✔ Create a task or an appointment from a message.
✔ Print messages.

Most new e-mail messages you receive appear in your Microsoft Office Outlook Inbox. (The exceptions to this are messages processed by any Outlook rules you or your administrator has set up, and messages diverted to the Junk E-mail folder due to suspicious content.)

After messages arrive in your Inbox, you can handle them in various ways. For example, you can:

- Read the message, either in the Reading Pane or in a message window.
- View any attachments, either in the Reading Pane or in the appropriate program, and save attachments to your hard drive.
- Respond to the message sender or to the message sender and all recipients.
- Forward the message to another person.
- Create an appointment or task based on the message.
- Categorize the message or file it in an Outlook folder for future electronic reference.
- Print the message for future “hard copy” reference.
- Delete the message.

When you are working online, you usually receive messages as soon as they are processed by your e-mail server. If you are working offline, you will need to connect to your server to download new messages. You can do this manually or set up Outlook to automatically check for new messages at regular intervals.
See Also For information about Outlook rules, see “Creating Rules to Process Messages” and for information about junk e-mail, see “Blocking Unwanted Messages,” both in Chapter 12, “Customizing and Configuring Outlook.”

In this chapter, you will experiment with receiving, viewing, responding to, or otherwise processing e-mail messages. You will preview and view messages and files attached to them. You will reply to and forward messages. Then you will work with incoming messages through New Mail notifications and learn to configure the notifications to display the way you want. You will also flag a message for follow-up so that it appears in the To-Do list, create an appointment from a message, and print a message.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important The exercises in this chapter require only practice files created in earlier chapters; none are supplied on the companion CD. For more information about practice files, see “Using the Companion CD” at the beginning of this book.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the “Information for Readers Running Windows XP” section at the beginning of this book.

Viewing Messages and Message Attachments

Each time you start Outlook and connect to your e-mail server, any new messages received since the last time you connected appear in your Inbox. Depending on your settings, Outlook downloads either the entire message to your computer or only the message header, which provides basic information about the message, such as:

- The item type (message, meeting request, task assignment, and so on)
- Who sent it
- When you received it
- The subject
- If you forwarded or replied to it
- If it contains attachments
- If it has been digitally signed or encrypted
- If it has been marked as being of high or low importance
Messages that you haven't yet read are indicated by closed envelope icons and bold headers. You can view the text of a message in several ways:

- You can open a message in its own window by double-clicking its header in the message list.
- You can read a message without opening it by clicking its header in the message list to display the message in the Reading Pane.
- If you turn on the Single Key Reading Using Space Bar option, you can page through a message in the Reading Pane by pressing the Spacebar. When you reach the end of a message, the first page of the next message is displayed. This option is very convenient if you want to read through several consecutive messages in the Reading Pane, or if you find it easier to press the Spacebar than to scroll the Reading Pane by using the mouse. If you do not turn on this option, pressing the Spacebar while viewing a message does nothing, so there is no harm in turning it on even if you aren’t sure you will use it.
Tip  To control whether you can page through messages by pressing the Spacebar, click Options on the Tools menu. On the Other tab of the Options dialog box, in the Outlook Panes area, click Reading Pane. Then in the Reading Pane dialog box, select or clear the Single Key Reading Using Space Bar check box, and click OK twice.

You can display the first three lines of each message under the message header by using the AutoPreview feature. Scanning the first three lines of a message frequently gives you enough information to make basic decisions about how to manage it. The only drawback is that AutoPreview dedicates five lines to each message rather than the two lines of the default Messages view, so fewer messages are visible on your screen at one time.

Marking Messages as Read
When you open a message, Outlook indicates that you have read it, by changing the message icon from a closed envelope to an open envelope and changing the header font in the message list from bold to normal. You can also instruct Outlook to mark a message as read after you have previewed it in the Reading Pane for a certain length of time. To do so:

1. On the Tools menu, click Options.
2. On the Other tab of the Options dialog box, in the Outlook Panes area, click Reading Pane.
3. In the Reading Pane dialog box, select the check box corresponding to the way you want Outlook to handle messages you view in the Reading Pane.
   - Mark items as read when viewed in the Reading Pane. Outlook will mark the item as read after it has been displayed in the Reading Pane for five seconds or the amount of time you specify.
   - Mark item as read when selection changes. Outlook will mark the item as read when you select another item.
4. Click OK in the two open dialog boxes.

You can manually mark an item as read or unread by right-clicking the item and then clicking Mark As Read or Mark As Unread. (The context menu shows only the available option.)
You can view message attachments in several ways:

- You can open the attachment from an open message or from the Reading Pane.
- You can preview certain types of attachments (including Microsoft Office Excel spreadsheets, Microsoft Office PowerPoint slideshows, Microsoft Office Word documents, and Portable Document Format (PDF) files) directly in the Reading Pane without opening the attached file. This new feature of Outlook 2007 saves time and increases efficiency. If you install add-ins provided by companies other than Microsoft (called third-party add-ins), you can preview other types of files as well.
- You can save the attachment to your hard disk and open it from there. This strategy is recommended if you suspect an attachment might contain a virus, because you can scan the attachment for viruses before opening it (provided that you have a virus scanning program installed).

If you receive a contact record as a message attachment, you can add it to your primary address book by dragging the attachment from the e-mail message to the Contacts button in the Navigation Pane. To add the contact record to a secondary address book, expand the folder structure in the Navigation Pane and drag the attachment to that folder.

**See Also** For information about protecting your computer from viruses, refer to *Windows Vista Step by Step*, by Joan Preppernau and Joyce Cox (Microsoft Press, 2007) or *Microsoft Windows XP Step by Step*, by Online Training Solutions, Inc. (Microsoft Press, 2004).

In this exercise, you will preview and open a message and an attachment.

**USE** the SBS First Draft message you created in “Attaching Files to Messages” in Chapter 3, “Sending E-Mail Messages.” If you did not complete that exercise, you can do so now, or you can use any message with an attachment in your Inbox. **BE SURE TO** start Outlook and display your Inbox before beginning this exercise.

1. On the View menu, click AutoPreview.

**Troubleshooting** If the AutoPreview icon on the View menu is shaded, this feature is already turned on.

The first three lines of each message appear in the Inbox below the message header.
2. Locate the *SBS First Draft* message in your Inbox, and then click the message. Outlook displays the message in the Reading Pane. Note that the Reading Pane displays the message header and the names of any attached files.

3. In the **Reading Pane**, point to the **Message** button below the message header.

   **Troubleshooting**  If you are working through this exercise with a message that does not have an attachment, you will not see a Message button.

A ScreenTip displays the number of attachments.
4. Point to the *Attaching.docx* attachment.

A ScreenTip displays the name, type, and size of the attached file.

5. Click the *Attaching.docx* attachment once.

Outlook asks you to confirm that you want to preview the file. This security measure is designed to prevent viruses or other malicious content from running without your consent.

6. In the *Reading Pane*, click *Preview file*.

**Tip** If you want Outlook to display previews of attachments without your explicit permission in the future, clear the *Always Warn Before Previewing This Type Of File* check box.

The fully formatted Word 2007 document appears in the Reading Pane. You can scroll through the entire document within this pane, without starting Word.
7. Click the *Attaching.pptx* attachment, and then click the **Preview file** button.

The title slide of this PowerPoint presentation appears in the Reading Pane. You can move among the presentation’s slides by clicking the Previous Slide and Next Slide buttons in the lower-right corner of the pane.

8. In the **Reading Pane**, click the **Message** button.

The message text reappears in the Reading Pane. You can switch between the message and any attachments in this way.

9. In the **Reading Pane**, double-click the *Attaching.pptx* attachment, and then in the **Opening Mail Attachment** message box, click **Open**.

PowerPoint 2007 starts and opens the *Attaching* presentation.

**See Also** For an introduction to the features of PowerPoint 2007, refer to *Microsoft Office PowerPoint 2007 Step by Step*, by Joyce Cox and Joan Preppernau (Microsoft Press, 2007).

10. Close the presentation to return to your Inbox.

11. In the message list, double-click the *SBS First Draft* message.

The message opens in its own window.
Note the message header and the attached file at the top. You can preview an attachment in the message window by clicking it once, and open an attachment by double-clicking it.

CLOSE the SBS First Draft message window.

**Replying to and Forwarding Messages**

You can reply to or forward most e-mail messages that you receive by clicking the Reply, Reply To All, or Forward button either within the message window or on the Standard toolbar. When replying to a message, Outlook fills in the To and Cc boxes for you, addressing the response either to only the original message sender or to the message sender and all other people to whom the message was addressed or copied (recipients listed in the To and Cc boxes), depending on the reply option you choose. Outlook does not include recipients of blind courtesy copies (Bcc recipients) in message replies. You can add, change, and delete recipients from any reply before sending it.

To include all recipients of a message in your reply, click the Reply To All button. Outlook addresses your reply to the original message sender and any recipients listed in the To box of the original message, and sends a copy to any recipients listed in the Cc box of the original message.

Similarly, you can forward a received message to any e-mail address (regardless of whether the recipient uses Outlook) provided the message was not sent with restricted permissions. When forwarding a message, Outlook does not fill in the recipient boxes for you.

**See Also** For information about restricting recipients from copying, printing, or forwarding messages, see “Securing Your E-Mail” in Chapter 12, “Customizing and Configuring Outlook.”
When responding to an e-mail message, take care to use good e-mail etiquette. For example, don’t forward messages containing large attachments to people with low-bandwidth connections who don’t need the attachment. If your response is not pertinent to all the original recipients of a message, don’t reply to the entire recipient list, especially if the message was addressed to a distribution list that might include hundreds of members.

**Tip** You can prevent people who are using Outlook from automatically replying to all recipients of a message you send, by creating a custom message form with the Reply To All functionality disabled. For more information, see the article “Prevent e-mail message recipients from using Reply All or Forward” at office.microsoft.com/en-us/assistance/HA011142241033.aspx

This method does not prevent recipients using Windows Mail, Microsoft Outlook Express, or Microsoft Outlook Web Access from using the Reply To All function. And of course, the person responding to your message can always choose to manually address his or her response to all the original recipients.

An easier way to prevent people from replying to multiple message recipients is to address the message to yourself and send blind courtesy copies to all other recipients. Then the recipient list will not be visible to anyone.

If the original message contains one or more attachments, be aware that replies do not include attachments, and forwarded messages do.

**Tip** If a message contains voting buttons, you can respond by opening the message and clicking the button corresponding to the response you want to send. Or you can click the Infobar (labeled *Click Here To Vote*) in the Reading Pane and then click the option you want. You can choose to send a blank response containing your vote in the message header, or you can edit the response to include additional text.

**See Also** For information about responding to other Outlook items, see “Responding to Meeting Requests” in Chapter 6, “Managing Appointments, Events, and Meetings,” and “Managing Task Assignments” in Chapter 8, “Tracking Tasks.”

If you use an e-mail signature, you can specify a different signature to appear in replies and forwarded messages than in new messages. For example, you might want to include your full name and contact information in the signature that appears in new messages, but only your first name in the signature that appears in replies and forwarded messages.
See Also For more information about e-mail signatures, see “Adding Signatures to Messages Automatically” in Chapter 3, “Sending E-Mail Messages.”

If you reply to or forward a received message from within the message window, the original message remains open after you send your response. You can instruct Outlook to close original messages after you respond to them—you will probably be finished working with the message at that point. To do so, click Options on the Tools menu. On the Preferences tab of the Options dialog box, click the E-mail Options button. In the E-mail Options dialog box, select the Close Original Message On Reply Or Forward check box, and then click OK in each of the two open dialog boxes.

In this exercise, you will reply to and forward messages.

USE the SBS First Draft message you created in “Attaching Files to Messages” in Chapter 3, “Sending E-Mail Messages.” If you did not complete that exercise, you can do so now, or you can use any message in your Inbox.

BE SURE TO display your Outlook Inbox before beginning this exercise.

OPEN the SBS First Draft message.

1. Look at the header information at the top of the message window.
   Note that this message includes two attachments, and the message window Ribbon displays only one tab (the Message tab), which contains all the commands you can use in a received message.

2. On the Message tab, in the Respond group, click the Reply button.
   Outlook creates a reply message, already addressed to you (the original sender). If the message had been sent to any other people, the reply would not include them.
A prefix, *RE:*, appears at the beginning of the message subject to indicate that this is a response to an earlier message. Note that the response does not include the original attachments (and in fact there is no indication that the original message had any). The original message, including its header information, appears in the content pane separated from the new content by a horizontal line.

3. With the insertion point at the top of the content pane, type

   **We’ll need to get approval from the Marketing team before proceeding.**

4. In the reply message header, click the *Send* button.

   Outlook sends your reply. (If you are connected to your e-mail server, the reply will appear shortly in your Inbox.) The original message remains open on your screen.

5. In the original message, in the **Respond** group, click the *Forward* button.

   **Troubleshooting** If the original message is closed, click the Forward button on the Standard toolbar.

   Outlook creates a new version of the message that is not addressed to any recipient. The *FW:* prefix at the beginning of the message subject indicates that this is a forwarded message. The files that were attached to the original message appear in the Attached box. The message is otherwise identical to the earlier reply message.

6. With the insertion point at the top of the content pane, type

   **Don’t forget to review these!**

7. Send the message, and then close the original message window.
Troubleshooting If you are not working online you will not receive the messages. Connect to your server to download the messages before continuing.

When the second message appears in your Inbox, compare the two messages. The forwarded message includes the original message attachments. Otherwise, other than the Subject prefixes and the text you entered, the messages are identical.

CLOSE any open message windows.

Deleting Messages

When you delete a message, contact record, or any other item, Outlook temporarily moves it to the Deleted Items folder of your mailbox. You can open the folder from the Navigation Pane, view items that have been deleted but not purged, and restore items (undelete them) by moving them to other folders.

Outlook does not permanently delete items until you purge them from the Deleted Items folder, You can empty the entire Deleted Items folder manually or automatically, or permanently delete individual items from it.

To permanently delete an individual item:

1. In the Navigation Pane, click the Deleted Items folder to display its contents.
2. In the Deleted Items list, click the item (or select multiple items) you want to delete.
3. On the Standard toolbar, click the Delete button (or press the Del key).
4. In the Microsoft Office Outlook message box asking you to confirm that you want to delete the selected item(s), click Yes.

To manually empty the Deleted Items folder:

- In the Navigation Pane, right-click the Deleted Items folder, and then click Empty “Deleted Items” Folder.

To automatically empty the Deleted Items folder each time you exit Outlook:

1. On the Tools menu, click Options.
2. On the Other tab of the Options dialog box, select the Empty the Deleted Items folder upon exiting check box. Then click OK.
Chapter 4  Handling E-Mail Messages

Working with New Mail Notifications

When new messages, meeting requests, or task delegations arrive in your Inbox, Outlook alerts you in several ways so that you can be aware of e-mail activity if you are working in another application or away from your computer:

- A New Mail Message icon appears in the notification area at the right end of the Windows taskbar.

- A semi-transparent desktop alert appears on your screen for a few seconds, displaying the name of the sender, the subject, and the first few words of the message (approximately 125 characters). From the desktop alert, you can open a message, mark it as read, flag it for action, respond to it, or delete it.

You can change the location, transparency, and length of time desktop alerts appear, or choose to not display them:

- You can position the alert inside or outside of the Outlook program window. For example, if you usually work with the Windows taskbar hidden, you might want to position the alert away from the taskbar to prevent you from accidentally displaying the taskbar each time you point to an alert.

- The alert can stay on screen for 3 to 30 seconds. The default is 7 seconds.

- The alert can be a solid color or up to 80% transparent. The default is 20% transparent. You might find that transparent alerts are less likely to interfere with your view of the work you’re doing.
If Outlook is minimized or another application window is active, a beep sounds. You can change the sound or turn it off.

The mouse pointer briefly changes shape when you receive a message. You can turn off this feature.

You can customize and turn off these notifications.

In this exercise, you will customize your desktop alert settings and process messages through desktop alerts as you receive them. There are no practice files for this exercise.

BE SURE TO display your Outlook Inbox before starting this exercise.

1. On the Tools menu, click Options.
   The Options dialog box opens.

2. On the Preferences tab, click E-mail Options. Then in the E-mail Options dialog box, click Advanced E-mail Options.
3. In the Advanced E-mail Options dialog box, click Desktop Alert Settings.

![Advanced E-mail Options dialog box](image1)

**Tip** To turn off desktop alerts, clear the Display A New Mail Desktop Alert check box.

4. Click the Desktop Alert Settings button.

The Desktop Alert Settings dialog box opens.

![Desktop Alert Settings dialog box](image2)
Tip  To quickly access the Desktop Alert Settings dialog box, when a desktop alert arrives, click the Options button in the alert, and then click Desktop Alert Settings. You can turn off desktop alerts by clicking the Options button and then clicking Disable New Mail Desktop Alert.

5. Drag the **How long should the Desktop Alert appear** slider to the left end of the slider bar to set it to **3 seconds**, and then click **Preview**.

A semi-transparent sample desktop alert appears in the lower-right corner of your desktop and fades away after three seconds.

6. Click **Preview** again, and when the alert appears, point to it.

The transparent alert becomes solid. As long as the mouse pointer is positioned over the alert, it remains visible.

7. Drag the sample desktop alert to the upper-right corner of your screen.

Future desktop alerts will appear wherever you move the sample alert.

8. In the **Desktop Alert Settings** dialog box, drag the **How transparent should the Desktop Alert be** slider to the left end of the slider bar to set it to **0% transparent**, and then click **Preview**.

The sample desktop alert appears in the upper-right corner of the screen, and darkens until it is opaque.

9. Move the desktop alert to the position you want it to appear in the future. Then experiment with the options in the **Desktop Alert Settings** dialog box, and set the duration and transparency as you want, previewing your changes as necessary.

10. When you’re done, click **OK** in each of the four open dialog boxes.

11. On the Standard toolbar, click the **New Mail Message** button.

A new message window opens.

12. Enter your e-mail address in the **To** box, and then in the **Subject** box, type **SBS Alert Test 1**.

13. In the message body, type **This is a test**. Then send the message.

**Important** The subject of each message we have you send to yourself while working through the exercises in this book begins with **SBS** so that you can easily differentiate the practice files from other messages in your Inbox and Sent Items folders.
When the message arrives in your Inbox, a New Mail Message icon appears in the notification area at the right end of the Windows taskbar, and a desktop alert appears on your screen.

14. When the desktop alert appears, point to it to keep it active.

If you point to the text displayed in the alert, it appears underlined. You can click the underlined text to open the message in a message window.

15. In the desktop alert, click the Options button, and then click Mark as Read.

The desktop alert closes, and the message in your Inbox is marked as read (whether or not the Inbox is visible).

16. On the Standard toolbar, click the New Mail Message arrow, and then in the list, click Meeting Request.

A new meeting request window opens.

17. In the To box, type your e-mail address; in the Subject box, type SBS Alert Test 2; and in the Location box, type my Inbox. Then send the meeting request.

18. If a Reminder window opens, click Dismiss.

See Also For more information about meeting requests, see “Scheduling, Updating, and Canceling Meetings” in Chapter 6, “Managing Appointments, Events, and Meetings.”

19. When the desktop alert appears, point to it, and then click the Delete Item button.

The message moves from your Inbox to the Deleted Items folder, and the desktop alert closes.

Creating a Task or an Appointment from a Message

Frequently you need to take some type of action based on the information you receive from another person in an e-mail message. Among other actions, you might need to add an item to your task list or calendar.
Outlook 2007 makes it incredibly simple to add a task to your task list from an e-mail message. In Outlook 2003, you could flag messages for follow up, locate flagged messages within a folder by sorting it on flags, or within your entire mailbox by viewing the For Follow Up Search Folder. In Outlook 2007, flagging a message in any mail folder or flagging a contact record adds that item to your task list, which you can view from the To-Do Bar or the Tasks module.

**See Also** For more information about the To-Do Bar and the To-Do Bar Task List, see “Personalizing Your Outlook Workspace” in Chapter 1, “Getting Started with Outlook 2007.” For information about creating and managing tasks, see Chapter 8, “Tracking Tasks.”

Although creating a task by flagging a message is very useful, you should be aware of a few limitations. Flagging the message doesn’t create a regular task; it simply adds the message to the task list. Because of this, you can’t assign a flagged message to another Outlook user or track its status. You can mark it as complete by clicking its flag in either the message window, message list, or task list, or by selecting the message and then clicking the Follow Up button on the Standard toolbar: doing so removes the message from your task list and changes the flag to a check mark. The biggest drawback, however, is that you must retain the message—you can move it between mail folders, but deleting the message deletes the task as well.

**Tip** Tasks created by simply clicking a message flag appear on your task list under the default due date header. You can change the default due date by right-clicking the flag and then clicking Set Quick Click. In the Set Quick Click dialog box, click the due date you want to appear by default (options are limited to Today, Tomorrow, This Week, Next Week, No Date, and Complete), and then click OK.

You can specify a task due date other than the default when you flag the message, by right-clicking the flag and then clicking the due date: Today, Tomorrow, This Week, Next Week, No Date, or Custom (which allows you to set specific start and end dates).

Outlook also provides a convenient method of creating a Calendar items (an appointment, event, or meeting request) based on an e-mail message; you simply drag the message to the Calendar button in the Navigation Pane. When you release the mouse button, an appointment window opens, already populated with the message subject as the appointment subject, the message text in the content pane, and any message attachments attached to the appointment. The start and end times are set to the next half-hour increment following the current time. You can convert the appointment to
an event or meeting in the same way that you would create an event or meeting from within the Calendar module. You can retain any or all of the information within the message as part of the Calendar item so that you (and other participants, when creating a meeting request) have the information on hand when you need it. After creating the Calendar item, you can delete the actual message from your Inbox.

See Also For information about creating and managing Outlook Calendar items, see Chapter 6, “Managing Appointments, Events, and Meetings.”

In this exercise, you will create a task and then an appointment from an e-mail message.

USE the SBS Tradeshow Schedule message you created in “Creating and Sending Messages” in Chapter 3, “Sending E-Mail Messages.” If you did not complete that exercise, you can do so now, or you can use any message in your Inbox.

BE SURE TO display your Outlook Inbox and the To-Do Bar before beginning this exercise.

1. In the message list, scroll to the SBS Tradeshow Schedule message, and then click the transparent flag in the right margin of the message header.

The flag becomes red, and a task named SBS Tradeshow Schedule appears under the Today header on your To-Do Bar task list.
2. In the **To-Do Bar Task List**, point to the *SBS Tradeshow Schedule* task.

   A ScreenTip appears displaying the start date, reminder time, due date, the folder in which the message appears, and any categories assigned to the message.

3. Double-click the *SBS Tradeshow Schedule* task.

   The flagged message opens in a message window. The message header indicates that you need to follow up on this message. The start and due dates given are tomorrow's date.

   ![Task information](image)

   The following people will be working at the tradeshow:
   
   - Anna
   - Barry
   - Carl
   - Denis
   - Emma

4. Close the message window.

5. In the **Navigation Pane**, click the **Tasks** button to display the Tasks module.

   Your active tasks appear in the To-Do List. The icon preceding each item in the list indicates whether it is a standard task, e-mail message, contact, and so on. Message icons match those shown in the Inbox, indicating whether the message is read or unread and whether you've replied to or forwarded the message.
6. In the **To-Do List**, click the *SBS Tradeshow Schedule* task to display its details in the Reading Pane.

![Image of To-Do List and Calendar]

For the purposes of this exercise, assume that you flagged this message for follow-up because you need to organize a meeting with colleagues to discuss its contents.

7. Drag the message from the **To-Do List** to the **Calendar** button in the Navigation Pane, but don’t release the mouse button.

As you hold the dragged message over the Calendar button, the Navigation Pane changes to display the Calendar module information instead of the Mail module information.

8. Drop the message on the **Calendar** button to create an appointment based on the message.
You can convert the appointment to an event by selecting the All Day Event check box, or convert it to a meeting by inviting other people to attend. You can edit the information in the content pane without affecting the content of the original message, and you can move or delete the original message without affecting the appointment.

9. In the appointment window, click the Save & Close button to save the appointment to your calendar.

10. When the appointment reminder window appears (15 minutes prior to the start time of the appointment) click Dismiss.

See Also For information about appointment reminders, see “Scheduling and Changing Appointments” in Chapter 6, “Managing Appointments, Events, and Meetings.”
Printing Messages

You can print an e-mail message, for example, if you want to take a hard copy of it to a meeting for reference, or if you keep a physical file of important messages or kudos. You can print the message exactly as it appears in your Inbox, or embellish it with page headers and footers. Outlook prints the message as shown on-screen, including font and paragraph formats.

In this exercise, you will preview a message as it will appear when printed, add a page header, and then print the message.

USE the SBS Tradeshow Schedule message you created in “Creating and Sending Messages” in Chapter 3, “Sending E-Mail Messages.” If you did not complete that exercise, you can do so now, or you can use any message in your Inbox.

BE SURE TO install a printer before beginning this exercise.

OPEN the SBS Tradeshow Schedule message.

1. In the message window, click the Microsoft Office Button, and then point to Print.

Tip Unlike previous versions of Outlook, the Print and Print Preview commands are not available from the message window toolbar (or in this case, the Ribbon).
The right pane displays these preview, print, and page setup options:

- **Print** opens the Print dialog box, where you can make changes to the default printing options before printing.
- **Quick Print** prints the open or selected message with the default printing options, without first displaying the Print dialog box.
- **Print Preview** displays the message as it will appear when printed. You can change the page setup options before printing the message.
- **Define Print Styles** allows you to make changes to an existing *print style* (the way the message is presented on the printed page) or create a new one. The default print style is Memo style, which prints your name, the message header information, and then the message content.

2. **Click the Print button (not its arrow).**

The Print dialog box opens, displaying your default printer settings, which you can change before printing just as you would when printing from any Office program. Clicking OK prints the message with the default settings.

3. **In the Print dialog box, click Preview.**

The Print Preview window opens, displaying the message as it will appear when printed.

**Tip** You can also display the Print Preview window by pointing to Print on the Office menu and then clicking Print Preview.
4. On the Print Preview window toolbar, click the **Actual Size** button to display the message at 100% magnification.

**Tip** When previewing a message that will be longer than one page when printed with the current settings, you can click the Multiple Pages button to preview all pages of the message at the same time. This can be useful when, for example, you want to check page breaks or scan a document for a particular element.

5. In the **Print Preview** window, click the **Page Setup** button.

The Page Setup: Memo Style dialog box opens. You can change the font, paper size, page margins, header, and footer from this dialog box.

**Tip** You can also display the Page Setup dialog box by pointing to Print on the Office menu and then clicking the print style you want under Page Setup.
6. In the Page Setup: Memo Style dialog box, click the Paper tab to see the available options.

In addition to choosing the paper size, you can select the number of pages that print on each sheet of paper and set the page margins and the orientation.
7. Click the Header/Footer tab.

8. In the Header area, type For Your Information in the center box, and then click the Font button. In the Font dialog box, under Size, click 16, and then click OK.

9. In the Footer section, select the default text (the page number) that appears in the center box. Then in the AutoText box, click the User Name button.

Outlook will print the specified text at the top of the page and your name (or user name, if different) at the bottom.

10. In the Page Setup dialog box, click Print, and then in the Print dialog box, click OK.

Troubleshooting If the Save As dialog box opens, you do not have a printer installed. Click the Start button, click Printers And Faxes, and then under Printer Tasks, click Add A Printer. Follow the wizard’s instructions to install a local or network printer.

Outlook prints the message, including your custom header and footer.

BE SURE TO remove the custom header and footer from the Memo print style if you don’t want to retain them.

CLOSE the SBS Tradeshow Schedule message.
Key Points

- By default, messages you receive appear in your Inbox. Outlook alerts you to new messages in several ways, all of which are customizable.

- You can see the first few lines of each message in AutoPreview, open a message in its own window, or preview messages in the Reading Pane.

- You can preview message attachments in the Reading Pane.

- You can reply to the message sender only or to the sender and all other recipients. You can also forward a message and its attachments to other people.

- You can create tasks or calendar items from received e-mail messages.

- You can print a message when you need a paper copy of its information.
Chapter at a Glance

- Work in the calendar item windows, page 176
- Schedule and change appointments and events, pages 182 and 186
- Schedule, update, and cancel meetings, page 188
Managing Appointments, Events, and Meetings

In this chapter, you will learn to:

✔ Work in the calendar item windows.
✔ Schedule and change appointments and events.
✔ Schedule, update, and cancel meetings.
✔ Respond to meeting requests.

You might find that your Microsoft Office Outlook Calendar runs your life—but that isn’t necessarily a bad thing! Using the Calendar effectively can help you to stay organized, on task, and on time. You can schedule and track appointments, meetings, and events. Because Outlook 2007 maps your scheduled tasks to your calendar, you can look at your calendar in Day view or Week view to see the tasks that need to be completed that day or that week, and you can track your progress by marking tasks as complete when you finish them.

In this chapter, you will record different types of information in your Outlook calendar, scheduling an appointment and an event on your own calendar and then scheduling a meeting with another person. You will learn methods of determining meeting times during which other people are available. Then you will learn about responding to, updating, and canceling meeting requests.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important No practice files are required to complete the exercises in this chapter. For more information about practice files, see “Using the Companion CD” at the beginning of this book.
Working in the Calendar Item Windows

We refer to the window in which you create or respond to an appointment as the appointment window, to a meeting as the meeting window, and to an event as the event window; collectively we refer to these windows as the calendar item windows. Like the contact and message windows, the calendar item windows contain their own commands, arranged on the new Office Ribbon instead of on menus and toolbars.

See Also For more information about the user interface for Outlook 2007 item windows, see “Working in the Contact Window” in Chapter 2, “Managing Contact Information.”

In this exercise, you will take a tour of the calendar item window elements that differ from the contact and message window elements discussed in earlier chapters, and you’ll learn about the differences between the types of calendar items. There are no practice files for this exercise.

BE SURE TO start Outlook before beginning this exercise.

1. In the Navigation Pane, click the Calendar button to display the Calendar module.
2. On the Standard toolbar, click the **New Appointment** button.

An untitled appointment window opens.

![New Appointment](image)

**Important** Depending on your screen resolution and the size of the appointment window that opens, you might see more or fewer buttons in each of the groups, or the buttons you see might be represented by larger or smaller icons than those shown in this book. Experiment with the size of the appointment window to understand the effect on the appearance of the Ribbon.

**See Also** For more information about the tabs and groups on the Ribbon, see “Working in the Contact Window” in Chapter 2, “Managing Contact Information.”

3. In the upper-left corner of the window, click the **Microsoft Office Button**.

Commands related to managing appointments (such as creating, saving, deleting, and printing) are available from the Office menu that appears.
See Also  For information about the Print commands, see “Printing Messages” in Chapter 4, “Handling E-Mail Messages.” For information about the commands available in the Editor Options window, see “Personalizing Your Office and Outlook Settings” in Chapter 12, “Customizing and Configuring Outlook.”

4. Click away from the Office menu to close it.

The appointment window commands are organized in groups on three tabs:

- Appointment
- Insert
- Format Text

Tip  Depending on what programs you have installed on your computer, tabs and groups other than those described here might also appear on the Ribbon. For example, if Microsoft Office OneNote is installed on your computer, a OneNote group appears on the Appointment tab.

The Appointment tab is active by default. Buttons representing commands related to creating appointments are organized on this tab in four groups: Actions, Show, Options, and Proofing. You can create a simple appointment by using only the commands available on this tab.
5. Click the **Insert** tab.

Buttons representing commands related to items you can insert are organized on this tab in six groups: Include, Tables, Illustrations, Links, Text, and Symbols.

6. Click the **Format Text** tab.

Buttons representing commands related to the appearance of message content are organized on this tab in six groups: Clipboard, Font, Paragraph, Styles, Zoom, and Editing.

7. On the **Appointment** tab, in the **Options** group, click the **Time Zones** button.

A new field displaying the time zone for each of the start and end times appears. With this useful Outlook 2007 feature, you can schedule an appointment that crosses time zones—for example, a flight from Los Angeles to New York.
See Also  For more information about configuring Outlook for different time zones, see “Configuring Outlook for Multiple Time Zones” in Chapter 7, “Managing Your Calendar.”

8. In the Start time area, select the All day event check box.

The window changes from an appointment window to an event window. The contents of the Format Text and Insert tabs don’t change, but an Event tab replaces the Appointment tab.

9. Click the Event tab.
The Event tab contents are nearly identical to the Appointment tab contents—the only change is that on the Event tab, in the Options group, by default your time is shown as Free rather than Busy, and the reminder is set to display 18 hours prior to the event rather than 15 minutes.

10. In the Start time area, clear the All day event check box to change the event to an appointment.

11. In the Actions group, click the Invite Attendees button.

The window changes from an appointment window to a meeting window. The contents of the Format Text and Insert tabs don’t change, but a Meeting tab that includes one additional group, Attendees, replaces the Appointment tab:

![Meeting window](image)

**Tip** You can invite people to an event in the same way you do to a meeting, by clicking the Invite Attendees button from within an event window.

The meeting request header includes a To field in addition to the standard Subject and Location fields. You can invite attendees by entering them in the To field or by clicking the Scheduling button in the Show group.

**BE SURE TO** click the Time Zones button to hide the time zone settings, if you don’t want to display them.

**CLOSE** the meeting window without saving your changes.
Scheduling and Changing Appointments

**Appointments** are blocks of time you schedule for only yourself (as opposed to meetings, to which you invite other people). If an appointment recurs at specific intervals, such as every Tuesday and Thursday, every other week or every month, you can set it up in your Outlook calendar as a **recurring** appointment; doing so creates multiple instances of the appointment in your calendar at the time interval you specify. Recurring appointments are linked. When making changes to recurring appointments, you can choose to update all occurrences or only an individual occurrence of the appointment.

When creating an appointment, you can show your time on the calendar as Free, Tentative, Busy, or Out Of Office. This information is available to other people on your network, and also when you send your schedule information to other people in an e-mail message or share your calendar. You can include information such as driving directions or Web site links in the Notes field, and attach related files so that they are easily available to you at the time of the appointment.

**See Also** For information about sending your schedule information via e-mail, see “Sending Calendar Information in an E-Mail Message” in Chapter 7, “Managing Your Calendar.” For information about sharing your calendar, see “Sharing Your Folders with Other People” in Chapter 10, “Collaborating with Other People.”

**Tip** When viewing your calendar in Day or Week view, each item on your Outlook task list appears in the Tasks section below its due date. You can schedule specific time to complete a task by dragging it from the Tasks area to your calendar.

**See Also** For information about creating an appointment from an e-mail message, see “Creating a Task or an Appointment from a Message” in Chapter 4, “Handling E-Mail Messages.” For information about assigning appointments to categories, see “Organizing Messages by Using Color Categories” in Chapter 5, “Managing Your Inbox.”

When Outlook is running, it displays a **reminder** message 15 minutes before the appointment start time—you can change the reminder time or turn it off completely if you want to. If you synchronize your Outlook installation with a mobile device such as a BlackBerry or a mobile phone running Windows Mobile, you can also receive reminders on your device. This is very convenient when you are away from your computer.

In this exercise, you will schedule an appointment and a recurring appointment. There are no practice files for this exercise.
BE SURE TO display the Calendar before beginning this exercise.

Troubleshooting  The default Calendar display is Day view. If your calendar does not look like the one shown in this exercise, click the Day button on the Standard toolbar.

1. In the Navigation Pane, in the Date Navigator, click tomorrow’s date.

   Tip  The Date Navigator displays six weeks at a time, including the selected month. The days of the selected month are black; days of the previous and next months are gray, but you can still select them in the Date Navigator.

Outlook displays tomorrow’s schedule.

2. In the Calendar pane, point to the **1:00 P.M.** time slot (or, if you already have an appointment scheduled at 1:00 P.M., to another time when you have 30 minutes available).

   Click **To Add Appointment** appears in the time slot.

3. Click once to activate the time slot.

   In this mode, you can enter basic appointment details directly in the Calendar pane.

4. Type **SBS Lunch with Jane**, and then press **Enter**.

   Important  The subject of each appointment, meeting, or event we have you create while working through the exercises in this book begins with **SBS** so that you can easily differentiate the practice files from other items on your calendar.

Outlook creates a half-hour appointment beginning at 1:00 P.M.

5. Drag the appointment from the 1:00 P.M. time slot to the **12:00 P.M.** time slot (or, if you already have an appointment scheduled at noon, to another time when you have an hour available).

   Outlook changes the appointment start time.

6. Point to the bottom border of the appointment, and when the pointer becomes a double-headed arrow, drag down so that the appointment ends at **1:00 P.M.**

   You can add more details to the appointment and vary from the default settings from within the appointment window.
7. Double-click the **SBS Lunch with Jane** appointment.
   The appointment window opens. The subject, start time, and end time are set according to the information you entered in the Calendar pane.

8. In the **Location** box, type **Fourth Coffee**.

9. On the **Appointment** tab, in the **Options** group, click the **Show As** arrow, and then in the list, click **Out of Office**.

10. In the **Options** group, click the **Reminder** arrow, and then in the list, click **1 hour**.

11. In the **Options** group, click the **Private** button.
   Marking an appointment, event, or meeting as Private hides the details from anyone you share your calendar with.

12. In the **Actions** group, click the **Save & Close** button.
   Outlook adds a purple stripe at the left side of the appointment to indicate you will be out of the office, and displays the location. The lock icon in the lower-right corner indicates that the appointment has been marked as private.

13. Double-click the **2:00 P.M.** time slot.
   Outlook opens an appointment window with the appointment start time set to 2:00 P.M. and the end time set 30 minutes later.

14. In the **Subject** box, type **SBS Staff Meeting**. Then in the **Location** box, type **Conference Room**.

15. On the **Appointment** tab, in the **Options** group, click the **Recurrence** button.
   The Appointment Recurrence dialog box opens.
Recurrence options

The default appointment recurrence is weekly on the currently selected day of the week. You can set the appointment to recur until further notice, or to end after a certain number of occurrences or by a certain date.

16. In the Range of recurrence area, click End after, and then in the box, replace 10 with 2.

17. To create a 30-minute appointment beginning at 2:00 P.M. on the selected day of the week, this week and next week only, click OK.

The appointment window title bar changes to reflect that this is now a recurring appointment, the Appointment tab changes to a Recurring Appointment tab, and the frequency (labeled Recurrence) appears in the message header.
18. On the **Recurring Appointment** tab, in the **Actions** group, click the **Save & Close** button.

The appointment appears on your calendar. The circling arrow icon at the right end of the time slot indicates the recurrence.

![Private appointment](image1.png)

![Recurring appointment](image2.png)

19. In the **Date Navigator**, click the day of the appointment in each of the next two weeks, to verify that the appointment appears on your calendar the next week, but not the following week.

**See Also**  For information about creating a OneNote page linked to an appointment, see the sidebar “Creating a OneNote Page Linked to an Appointment, an Event, or a Meeting” in Chapter 7, “Managing Your Calendar.”

### Scheduling and Changing Events

**Events** are day-long blocks of time that you schedule on your Outlook calendar—for example, a birthday, a payroll day, or anything else occurring on a particular day but not at a specific time. In all other respects, events are identical to appointments, in that you can specify a location, indicate recurrence, indicate your availability, invite attendees, and attach additional information to the event item.

You can create an event when viewing your calendar in Day view, Week view, or Month view.

**See Also**  For information about creating an event from an e-mail message, see “Creating a Task or an Appointment from a Message” in Chapter 4, “Handling E-Mail Messages.”

In this exercise, you will schedule an event and convert it to a recurring event. There are no practice files for this exercise.
1. In the Date Navigator, click tomorrow’s date.

2. In the Calendar pane, point to the blank space below the day header and above the delineated time slots.
   Click To Add Event appears in the space.

3. Click once to activate the event slot.
   In this mode, you can enter basic event details directly in the Calendar pane.

4. Type SBS Anniversary, and then press Enter.
   Outlook creates a one-day event. You can add more details to the event and vary from the default settings from within the event window.

5. Double-click the SBS Anniversary event.
   The event window opens. The subject and date are set according to the information you entered in the Calendar pane.

6. On the Event tab, in the Options group, click the Recurrence button.
   The Appointment Recurrence dialog box shown earlier in this chapter opens. The default recurrence for events is the same as for appointments—weekly on the currently selected day of the week.

7. In the Recurrence pattern area, click Yearly.
   You can schedule an annual event to recur on a specific date or on a selected (first, second, third, fourth, or last) day of the month.
8. To create a recurring annual appointment on the same date each year, click **OK**. The event window title bar changes to reflect that this is now a recurring event, the Event tab changes to a Recurring Event tab, and the frequency appears in the header.

9. On the **Recurring Event** tab, in the **Actions** group, click the **Save & Close** button. The event appears at the top of the Calendar pane. The circling arrow icon at the right end indicates the recurrence.

---

**Scheduling, Updating, and Canceling Meetings**

Scheduling meetings through Outlook is significantly simpler than scheduling meetings manually, particularly when you are coordinating the schedules of several people. A primary difficulty when scheduling a meeting is finding a time that works for everyone. Outlook displays the individual and collective schedules of people within your own organization, and of people outside of your organization who have published their availability to the Internet.

You can send a meeting invitation (referred to as a **meeting request**) to any person who has an e-mail account (even to people who don't use Outlook). You can inform non-critical attendees of the meeting by marking their attendance as Optional. You can invite entire groups of people by using an e-mail alias or distribution list. The meeting request can include text and Web links, as well as file attachments. This is a convenient way of ensuring that meeting attendees have specific information available to them. Outlook automatically tracks responses from attendees and those responsible for scheduling the resources you requested, so you always have an up-to-date report of how many people will be attending your meeting.

If your organization is running Microsoft Exchange Server and the Exchange Server directory includes shared resources such as conference rooms or presentation equipment, you can request these resources by inviting them to the meeting. Resource requests may be automatically approved, or an individual may be assigned the responsibility of approving each resource request.
Using the Exchange Server 2007 Smart Scheduling Feature

If your organization is running Exchange Server 2007, Outlook simplifies even further the process of selecting a suitable meeting time by presenting you with a list of meeting times of any duration you specify, and indicating for each time the number of required and optional attendees who are available.

The Scheduling Assistant page is similar to the Scheduling page displayed when organizing a meeting on an Exchange Server 2003 network.

The calendar on the right side of the window indicates the collective availability of the group by color. Dates that occur in the past and non-working days are shaded; scheduling suggestions are not provided for those days.

- Days when all attendees are available are white (Good)
- Days when most attendees are available are light blue (Fair)
- Days when most attendees are not available are medium blue (Poor)

In the Suggested Times list, Outlook displays attendee availability for appointments of the length specified in the Duration list. The availability of required attendees is shown separately from that of optional attendees and resources.

Selecting a date in the calendar displays the suggested meeting times for that day. Clicking a meeting time in the Suggested Times list updates the meeting request.
You might find it necessary to change the date, time, or location of a meeting—for example, because of a schedule conflict. You can change any information in a meeting request at any time, including adding or deleting invited attendees, or canceling the meeting. To edit a meeting request, double-click the meeting on your calendar. If the meeting is one of a series (a recurring meeting), Outlook prompts you to indicate whether you want to edit the meeting series or only the selected instance of the meeting. After you make changes, Outlook sends an updated meeting request to the invited attendees to keep them informed. If the only change you make is to the attendee list, Outlook gives you the option of sending an update only to the affected attendees.

See Also For information about creating a meeting request from an e-mail message, see “Creating a Task or an Appointment from a Message” in Chapter 4, “Handling E-Mail Messages.”

In this exercise, you will create and send a meeting request. There are no practice files for this exercise.

**BE SURE TO** display the Calendar and inform a co-worker or friend that you are going to practice inviting him or her to a meeting.

1. In the **Date Navigator**, click tomorrow’s date. Then in the Calendar pane, click the 3:00 P.M. time slot (or if you have a conflicting appointment, click a time when you have 30 minutes available).

2. On the Standard toolbar, click the **New Appointment** arrow, and then in the list, click **Meeting Request**.

An untitled meeting window opens.

**Troubleshooting** If the active selection in the Calendar pane is an event, Outlook will create an Invited Event request instead; if this happens, clear the All Day Event check box to convert the Invited Event to a Meeting.

3. In the **To** box, type the e-mail address of someone within your organization, or if you aren’t working on an Exchange Server network, type any e-mail address, for example, adam@contoso.com.

4. In the **Subject** box, type **SBS Meeting 1**.

5. In the **Location** box, type **Test – please accept** to indicate to the person you are inviting that the meeting request is for testing purposes only.
6. On the **Meeting** tab, in the **Show** group, click the **Scheduling** button.

The All Attendees list on the Scheduling page includes you and the e-mail address (or if the person is in your address book, the associated name) you entered in the To box. The black icon next to your name indicates that you are the meeting organizer. The red icon next to the sole attendee’s name indicates that he or she is a required attendee. You can click an attendee’s icon to switch between Required Attendee and Optional Attendee status, or to indicate a resource rather than a person.

![Scheduling page](image)

**Tip** You can enter additional attendees in the To box on the Appointment page or in the All Attendees list on the Scheduling page. If you prefer, you can organize a meeting directly from a Scheduling page-like interface by clicking Plan A Meeting on the Actions menu.

Outlook indicates the suggested meeting time with green (start time) and red (end time) vertical bars. If free/busy information is available for meeting invitees, their time is shown as white (Available), blue (Busy), or purple (Out of Office). Tentative bookings are indicated by light-blue diagonal stripes. If no information is available (either because Outlook can’t connect to a person’s calendar or because the proposed meeting is further out than the scheduling information stored on the server), Outlook indicates this by gray diagonal stripes. The gray row at the top of the schedule indicates the collective schedule of all the invitees.
You can change the time and duration of the meeting to work with the displayed schedules by selecting from the lists at the bottom of the Scheduling page, by dragging the green and red vertical bars in the schedule area, or by clicking the time you want in the schedule area.

7. In the lower-right corner of the Scheduling page, click the AutoPick Next button. The Start Time and End Time bars move to the next available half-hour time slot. You can change the Show As and Reminder settings, create recurrences, assign color categories, and make any other changes you want. The availability specified in the Show As list will apply to all attendees who accept your meeting request.

8. After you select the meeting time you want, click the Appointment button in the Show group. The Appointment page is displayed.

9. Verify the meeting details, and then click the Send button. The meeting appears in your calendar on the specified date and in the specified time slot.

Responding to Meeting Requests

When you receive a meeting request from another Outlook user, the meeting appears on your calendar with your time scheduled, but shown as Tentative. Until you respond to the meeting request, the organizer doesn’t know whether you plan to attend. You can respond in one of four ways:

- You can accept the request. Outlook deletes the meeting request and adds the meeting to your calendar.
- You can tentatively accept the request, indicating that you might be able to attend the meeting but are undecided. Outlook deletes the meeting request and shows the meeting time on your calendar as tentatively scheduled.
- You can propose a new meeting time. Outlook sends your request to the meeting organizer for confirmation and shows the original time on your calendar as tentatively scheduled.
- You can decline the request. Outlook deletes the meeting request and removes the meeting from your calendar.

If you don’t respond to a meeting request, the meeting remains on your calendar, with your time shown as tentatively scheduled.
Creating a Meeting Workspace

If your organization has a collaboration site built with Microsoft SharePoint products and technologies, such as a team site, on which you have permission to create document libraries, you can create a *meeting workspace* (a shared site for planning a meeting and tracking related tasks and results) at the same time that you schedule the meeting. You can also create a meeting workspace for a meeting that you previously scheduled; after you change the meeting request to include the meeting workspace information, Outlook sends an updated request containing the information to all attendees.

To create a meeting workspace in a new or existing meeting request:

1. In the meeting window, on the **Meeting** tab, in the **Attendees** group, click the **Meeting Workspace** button.

2. In the **Meeting Workspace** pane that opens on the right side of the meeting window, click the **Select a location** arrow, and then in the list, click the SharePoint site where you want to create the meeting workspace. (If this is the first time you’ve used the Meeting Workspace pane, you might first need to click **Change settings**.) If you haven’t previously set up a meeting workspace or document library on the SharePoint site you want to use, click **Other** in the **Select a location** list, enter the SharePoint site address in the **Other Workspace Server** dialog box that opens, and then click **OK**.

3. In the **Select a workspace** area, select the template language and meeting workspace template you want to use, and then click **OK**. Or if you want to link to an existing meeting workspace, select that option, click the **Select the workspace** arrow, and then in the list, click the existing workspace.

4. In the **Meeting Workspace** pane, click **OK**.

Attendees can link to the meeting workspace from the meeting request or from the meeting item on their calendars.

*See Also* For more information about using Outlook with SharePoint products and technologies, see Chapter 10, “Collaborating with Other People.”
If you’re unsure whether a meeting time works for you, you can click the Calendar button within the meeting request window to open your Outlook calendar for the suggested meeting day in a separate window, so you can view any conflicting appointments.

When accepting or declining a meeting, you can choose whether to send a response to the meeting organizer. If you don’t send a response, your acceptance will not be tallied in the Meeting form, and the organizer and other attendees will not know whether you are planning to attend the meeting. If you do send a response, you can add information to the response before sending it, if you want to convey a message to the meeting organizer.

To manually respond to a meeting request:

1. In the meeting request window, in the Reading Pane, or on the shortcut menu that appears when you right-click the meeting request, click **Accept**, **Tentative**, or **Decline**.

2. Choose whether to send a standard response, a personalized response, or no response at all.

To propose a new time for a meeting:

1. In the meeting request window, in the Reading Pane, or on the shortcut menu that appears when you right-click the meeting request, click **Propose New Time**.

2. In the schedule area of the **Propose New Time** dialog box, similar to the Scheduling page of the meeting request window shown earlier, change the meeting start and end times to the times you want to propose, and then click the **Propose Time** button.
3. In the meeting response window that opens, enter a message to the meeting organizer if you want to, and then click **Send**.

Outlook sends your response and adds the meeting to your calendar as tentatively scheduled for the original meeting time. After the meeting organizer approves the meeting time change, you and other attendees will receive updated meeting requests.

You can also choose to respond to meeting requests automatically. If you do, Outlook will process meeting requests and cancellations in accordance with your instructions.

To instruct Outlook to automatically respond to meeting requests:

1. On the **Tools** menu, click **Options**.
2. On the **Preferences** tab of the **Options** dialog box, click the **Calendar Options** button.
3. In the **Calendar Options** dialog box, click the **Resource Scheduling** button.
4. In the **Resource Scheduling** dialog box, select the **Automatically accept meeting requests and process cancellations** check box.
5. Select the **Automatically decline conflicting meeting requests** and/or the **Automatically decline recurring meeting requests** check boxes if you want Outlook to do this.
6. Click **OK** in each of the open dialog boxes.

**Key Points**

- You can create and manage appointments and all-day events in your calendar.
- You can use Outlook to set up meetings, invite participants, and track their responses. Outlook can help you choose a meeting time based on participants’ schedules.
- Other people in your organization can see your free, busy, and out-of-office time that you indicate in your calendar. You can personalize the display of your available working hours, and mark appointments as private to hide the details from other people.
- If your organization has a SharePoint collaboration site, you can create a meeting workspace to accompany a meeting request. Meeting workspaces provide a central location for sharing information and files among meeting attendees.
- If your organization is running Exchange Server 2007, you can use the Smart Scheduling feature to quickly identify meeting times of a specific duration during which your planned attendees are available.
Index

A

accepting meeting requests  
automatically, 195  
tentatively, 192  
account profiles  
adding, 15  
adding e-mail accounts to, 9–10  
choosing, when prompted, 16  
creating, xxxviii  
displaying current, 14  
multiple, 12  
naming, 15  
prompting for on startup, xxxviii, 16  
renaming, 15  
setting as default, 12, 17  
storage location of, 12  
switching between, 14  
Account Settings dialog box, 248  
accounts, e-mail  
adding to profiles, 9–10  
connecting, xxxvii  
different signatures for, 109  
grouping messages by, 150  
Outlook support for different types, 2  
switching between, 10  
Active Appointments view, 198  
Activities button, 255  
Actual Size button, 209  
Add Card Picture dialog box, 51  
Add Holidays To Calendar dialog box, 203  
Add New button, 48  
Add New Category dialog box, 163  
Add New E-mail Account wizard, xxxvii, 10, 15  
Add New Member dialog box, 48  
Add Shape button, 94  
address books  
creating, 52  
exporting, xl, 56  
online, 286, 336  
searching, xlii  
sharing, xl, 53  
address cards, xlii

Address Cards view, 57  
address lists  
contacts in (see contacts)  
for Exchange Server, 37, 334  
global, 37, 334  
viewing, 38  
addresses, e-mail  
commas, separating with, 329  
validating, xli, 9, 82  
addressing messages  
checking addresses before, 82  
commas as separators when, 81  
from contact records when, 81  
to contacts, 38  
as courtesy copies, 82  
to internal addresses, 81  
to multiple people, 81  
advanced e-mail options, 327  
Advanced toolbar  
in Calendar module, 26  
in Contacts module, 26  
displaying, 25  
in Mail module, 25  
alerts.  See also reminders  
for appointments, 182, 184  
customizing, xliii  
defined, 333  
deleting messages with, xliv, 130  
for e-mail messages, 126  
location, customizing, xliii  
managing, 26  
marking messages as read with, xliv, 130  
moving, 129  
setting length of time visible for, 129  
transparency, setting, 129  
turning off, xliv, 128  
All Appointments view, 198  
All Attendees list, 191  
alphabets, 58  
animation, 304  
Annual Events view, 198  
Appointment Recurrence dialog box, 185, 187  
Appointment tab, 179
appointment window
defined, 176, 333
opening, 177, 184
Ribbon in, 178
switching to event window, 180
switching to meeting window, 181
appointments. See also events
adding, 184
adding directly to calendar, 183
calendars, viewing grouped by, 198
changing number shown in To-Do Bar, 22
creating, xlv, 134, 177
creating, from e-mail messages,
defined, 182, 333
hiding, 184
moving, xlix, 183
opening, 184
Out of Office, showing time as, 184
Private, marking as, 184
recurring, 182, 185, 188
reminders for, 182, 184
scheduling, xlviii
showing availability during, 182
time, changing, 184
time zone, setting, 180–81
Archive dialog box, 172
archiving, 333
archiving messages, 169
automatically (see AutoArchive)
cancelling while in progress, 172
folder options, xlviii, 172
manually, xlviii
arrangement, 333
arranging e-mail messages, 148, 151
art in e-mail messages. See SmartArt
Assign Task button, 238
Assigned Task icon, 238
assigning tasks, lii. See also task requests
from contact records, 26, 44
following progress after, 238
outside organization, 238
with reminders set, 239
status reports on, 238
Attach File button, 89, 269
attaching files to messages. See attachments
Attachment Options task pane, 270
attachments, 90
attaching, xlii
encrypting, 320 (see also digital IDs)
grouping messages by, 149
notes, forwarding as, 257
opening, xlv, 117, 120
previewing, xlv
previewing in Reading Pane, 117, 119
when replying to messages, 124
restricting permissions for, 321
saving contact records, 117
saving to hard disk, 117
searching, 144
shared (see shared attachments)
switching between messages and, 120
viewing details about, 119
attendees. See events; meetings
Author role for delegating, 263
auto-reply messages. See also Out Of Office Assistant
configuring, lix, 290
creating, lix, 289
restricting recipients, lx, 294
scheduling, lx, 293
turning off, 291
AutoArchive, 169
deleing, 171
defined, 333
options, 172
settings, xlviii, 171
AutoArchive dialog box, 170
AutoCorrect options, 302
automatic search filtering, xlvii, 62, 144. See also searching
contacts, finding with, xl
implementing, 145
automatic setup
defined, 3
troubleshooting, 7
AutoPick Next button, 192
AutoPreview, 26, 116–17, 153
AutoSave, 329
availability, sharing, 213
Background Color button, 51
background color of messages, 104
backing up Personal Folder files, 314
Bcc field, xlii
BE SURE TO paragraphs, xxiv
birthdays, entering in contact records, 42
blind carbon copies, xlii
blocked content, viewing, lxiii, 322
Blocked Senders List, 326
blocking
e-mail, 326
external content, 322
blogs, 246, 333. See also RSS feeds
bulleted lists
  changing level in, 85
  creating, 84
  promoting/demoting list items in, 85
Bullets button, 84
Bullets gallery, 85
Business Card button, 51
business cards, 49
  background color, applying, 51
e-mailing, xlii, 91
  editing, 51, 52
  graphics, adding, 51
  sending to other people, 50
  as signatures, 109
Business Contact Manager, 13
Business Tools tab, 35
buttons, toolbar, 298. See also specific button names; tabs
  adding, 299, 306
  arrows on, 32
  margin icons for, xxiv
  moving, 300, 306
  removing, 301, 306
By Category view, 199

C
Cached Exchange mode
defined, 283, 333
download options, 284
calendar bar. See To-Do Bar
Calendar button, 134, 200
calendar item windows
  defined, 176, 333
tabs, 179–181
Calendar Options button, 206
Calendar Options dialog box, 195, 203, 205–06
calendars
  Active Appointments view, 198
  All Appointments view, 198
  Annual Events view, 198
  available time, 201, 204–205
  By Category view, 199
  copying items between, 219
  Day view, 199
  Day/Week/Month view, 198
default display, 200–201
  delegating control of, liii, 220
displaying multiple, 219
e-mail messages, creating items from, 131, 134
e-mailing (see sharing calendars)
Events view, 198
holidays, I, 203
Internet, 216
  items, creating from e-mail messages, 131, 134
  items, moving between calendars, 219
  level of detail, setting, 202
  Month view, 201
  multiple, 218–19
  navigating, 199, 202
  OneNote, linking to, lii, 216
  Outlook Data Files view, 199
  permissions, granting to other users, lii, 220
  printing, li (see printing calendars)
  publishing on the Web, 212
  Recurring Appointments view, 198
  resetting, 201
  saving as Web pages, lii, 212
SharePoint, 274
  sharing, li, 212–14
Side-By-Side mode, 219
  switching to other calendar from, 216
  time periods, switching between, 198
  views, 198–99
  week numbers, displaying, 199
  work week, 201, 204–205
  Work Week view, 198
canceling messages, xlii, 88
categories, 44, 161
  adding, 163
  applying, 161
calendar bars, viewing grouped by, 199
calendar colors, changing, xlvi
  contacts, assigning to, xxxix, 45
calendar default, setting, 161
defined, 333
displaying current, 162
displaying default, xlvi
e-mail messages, assigning to, 99
grouping contacts by, 60
grouping messages by, 149, 161, 164
  for holidays, adding, 203
  as Quick Click categories, 161
genre
  rewriting, 162
  shortcut keys, assigning to, 163
  sorting Inbox by, xlvi
  standard, 44
  for tasks, changing, 235
  viewing messages in, 161
Categorize button, 45, 161–62
Categorized Mail folder, 160
Category bar, 161
category views, 148
CCing messages, xlii, 82
CD, companion to book
how to use, xxiii
practice files on, xxv
resources available on, xxvi
CD icon, xxiv
Certificate Import Wizard, 7
certificates, 7
certification authorities, 318. See also digital IDs
Change Colors button, 96
Change E-Mail Account dialog box, 279
changes, tracking, 304
chapter thumb tabs, xxiii
color categories
adding, 163
applying, 161
calendars, viewing grouped by, 199
colors, changing, xlvi, 163
contacts, assigning to, xxxix, 45
creating, xlvi
default, setting, 161
defined, 333
dialog box, 46, 162
displaying current, 162
displaying default, xlvi
e-mail messages, assigning to, 99
grouping by, 60, 149, 161, 164
for holidays, adding, 203
as Quick Click categories, 161
renaming, xlvi, 162
shortcut keys, assigning to, 163
sorting Inbox by, xlvi
standard, 44
for tasks, changing, 235
viewing messages in, 161
colored message headers, 161
Colors gallery, 96
columns
deleting from Inbox, 158
reordering, xlvi, 157
commands, 298
displaying list of, 300
new organization of, xii
on Quick Access Toolbar (see Quick Access Toolbar)
commas as separators when addressing
messages, 81, 329
Companion CD
how to use, xxiii
practice files on, xxv
resources available on, xxvi
collaboration sites
calendars, 274
connecting to Outlook from, lvii, 272
Collapse button, 61, 155
collapsing
e-mail messages, 61
groups, xlvi, 155
menus, 178
color
background, 51, 104
business cards, applying to, 51
font, 103
of notes, changing, 252
in tasks, changing, 232
collaboration sites
connecting Outlook over HTTP, lvii, 279
connection speed minimum for Office 2007, xxvii
Contact records
as address cards, 57
addressing messages from, 44
assigning tasks from, 44
Business Card area (see electronic business cards)
as business cards (see electronic business cards)
color categories, xxxix, 45, 60
creating, xxxviii, 33, 43
contacts folders
    creating, xxxix, 53
defined, 38, 333
sharing, 53
storage location, selecting, 54
Contacts For Note dialog box, 254
Contacts list, 47
Contacts module, defined
Contacts pane, 33, 255
customizing
    forms, 305
    Outlook, lxi, 301
    Quick Access Toolbar, 76
Custom dialog box, 242
Custom View Organizer dialog box, 159
cutting and pasting, 304
courtesy copies, xlii, 82
Create Microsoft Personal Folders dialog box, 315
calendar items, between calendars, 219
ez-mail messages, preventing, 99
    formatting, 103
text, 304
customizing
    forms, 305
    Outlook, lxi, 301
    Quick Access Toolbar, 76
    Search Folders, xlvii, 160
    To-Do Bar, 22
data files
closing, lxiii
creating, 314
defined, 333
on network server, 314
opening, lxiii, 316
don personal computer (see Personal Folders files)
date, grouping messages by, 149
date bar. See To-Do Bar
defined, 333
Display As box, 40
displaying, 33, 56, 255
from e-mail attachments, 117
File As field, 40
importing, 56
items linked to, displaying, 255
maps of contact addresses, displaying, 44
meeting requests, creating from, 44
navigating, 57
notes, adding to, lv, 254
OneNote, linking to, xli, 71
as phone list, 57
placing Internet calls from, 44
and memos, 118
printing selected, 67, 70
sorting, xl, 59
views, xl, 57
Web sites, displaying from, 44
Contact tab, 35
contact window
    defined, 333
    Quick Access Toolbar in, adding items to, 31
tabs in, 35
contacts
    additional details, displaying, 42
    addressing Outlook items to, 26, 38
    birthdays, entering, 42
default mailing address, displaying, 41
defined, 333
displaying as address cards, 57
displaying as business cards, 57
displaying as phone list, 57
distribution lists of, 48, 46
e-mail addresses, entering, 40
e-mailing, 91
    editing, xxxviii–xxxix
groups, (see contacts folders)
    information stored for, 39
Journal, recording activities in, 256
    names, entering, 40
    navigating, 58
opening records for, 42
    phone numbers, entering, 40
    searching, xl, 63
    sorting by column, 59
street addresses, 40–41
    views, default, 58
    views, managing, 59
    Web page associated with, viewing, 26
    window for entering information about, 31
Contacts button, 33
Contacts for Note dialog box, 254
Contacts list, 47
Contacts module, defined
Contacts pane, 33, 255
customizing
    forms, 305
    Outlook, lxi, 301
    Quick Access Toolbar, 76
Custom dialog box, 242
Custom View Organizer dialog box, 159
customizing
    forms, 305
    Outlook, lxi, 301
    Quick Access Toolbar, 76
    Search Folders, xlvii, 160
    To-Do Bar, 22
contact window
    defined, 333
    Quick Access Toolbar in, adding items to, 31
tabs in, 35
contacts
    additional details, displaying, 42
    addressing Outlook items to, 26, 38
    birthdays, entering, 42
default mailing address, displaying, 41
defined, 333
displaying as address cards, 57
displaying as business cards, 57
displaying as phone list, 57
distribution lists of, 48, 46
e-mail addresses, entering, 40
e-mailing, 91
    editing, xxxviii–xxxix
groups, (see contacts folders)
    information stored for, 39
Journal, recording activities in, 256
    names, entering, 40
    navigating, 58
opening records for, 42
    phone numbers, entering, 40
    searching, xl, 63
    sorting by column, 59
street addresses, 40–41
    views, default, 58
    views, managing, 59
    Web page associated with, viewing, 26
    window for entering information about, 31
Contacts button, 33
contacts folders
    creating, xxxix, 53
defined, 38, 333
sharing, 53
storage location, selecting, 54
Contacts For Note dialog box, 254
Contacts list, 47
Contacts module, defined
Contacts pane, 33, 255
customizing
    forms, 305
    Outlook, lxi, 301
    Quick Access Toolbar, 76
Custom dialog box, 242
Custom View Organizer dialog box, 159
customizing
    forms, 305
    Outlook, lxi, 301
    Quick Access Toolbar, 76
    Search Folders, xlvii, 160
    To-Do Bar, 22
cutting and pasting, 304
data files
    closing, lxiii
    creating, 314
defined, 333
    on network server, 314
    opening, lxiii, 316
    on personal computer (see Personal Folders files)
date, grouping messages by, 149
date bar. See To-Do Bar

daily style for printed calendars, 207
daily task list, 230
dashboard, Business Contact Manager, 13
data files
    closing, lxiii
    creating, 314
defined, 333
    on network server, 314
    opening, lxiii, 316
    on personal computer (see Personal Folders files)
date, grouping messages by, 149
date bar. See To-Do Bar
Date Navigator
appointments, adding in, 183
customizing number of months displayed in, 22
default display of, 183
defined, 333
displaying different date in, 183
months shown in, increasing, 199
Day view, 199
Day/Week/Month view, 198
deadlines. See due dates
declined tasks, reclaiming, 239
declining meeting requests, 192, 195
delaying message delivery, 99
Delegate Permissions dialog box, 221
delegates
defined, 333
roles for, 263
delegating
calendar control, liii, 220
folders, 263
subfolder permission, 263
tasks (see assigning tasks)
Delete Item button, 130
Deleted Items folder, 125
deleting
e-mail messages, 125
e-mail messages, with desktop alerts, xliv, 130
holidays, 203
Inbox columns, 158
Internet calendars, 216
junk e-mail, automatically, 325
permanently, 125
RSS feeds, 248
signatures, 110
task reminders, 240
tasks, liv, 240, 242
delivery options, 99
delivery receipts, 99
demoting bulleted list items, 85
Desktop Alert Settings dialog box, xliv, 128–29
desktop alerts. See also reminders
for appointments, 182, 184
customizing, xliii
defined, 333
deleting messages with, xliv, 130
for e-mail messages, 126
managing, 26
marking messages as read with, xliv, 130
moving, xliii, 129
setting length of time visible for, 129
transparency, setting, 129
turning off, xliv, 128
Desktop Search Engine. See Instant Search
detailed Address Cards view, 57
details button, 42, 236
developer tab on Ribbon, 302
diagrams in e-mail messages. See SmartArt
dial-up networking, 334
Dialog Box Launcher, 32, 36, 99, 334
dialog boxes
Account Settings, 12, 248
Add Card Picture, 51
Add Holidays To Calendar, 203
Add New Category, 163
Add New Member, 48
Appointment Recurrence, 185, 187
Archive, 172
AutoArchive, 170
Calendar Options, 195, 203, 205–206
Change E-Mail Account, 279
Check Address, 41
Choose A SmartArt Graphic, 92
Choose Profile, 16
Color Categories, 46, 162
Connect, 282
Connect To A Network, 281
Contacts For Note, 254
Create Microsoft Personal Folders, 315
Create New Folder, 53, 166, 231, 311
Create Or Open Outlook Data File, 315
Custom, 242
Customize, 306
Customize View, 156, 201
Custom View Organizer, 159
Delegate Permissions, 221
Desktop Alert Settings, xliv, 128
Edit Business Card, 51
Edit Rule, 289
Folder Properties, 264
Font, 37
Group Schedules, 271
Import/Export Digital ID, 319
Inbox Properties, 171
Insert Business Card, 91
Insert File, 89
Internet Accounts, 251
Journal Options, 256
Junk E-mail Options, 324
Location Information, 40
Mail, 15–16
Mail Setup, 14
Microsoft Exchange, 279
Microsoft Exchange Proxy Settings, 279
Move Items, 167
document libraries, 272–73
document workspaces
creating from Outlook, lvii, 269
defined, 334
documents
sharing, lvii, 269–70, 272–73
title bar, 31
Documents folder in Windows XP, xv
domains, blocking e-mail from, 326
downloading
blocked pictures, 322
Internet calendars, 217
drafts
defined, 334
saving, 82
settings, lxiv
dragging menu bar, 23
due dates, task
changing, 234
grouping messages by, 150
setting for This Week, 235
specifying, xlv

E

e-mail. See also e-mail accounts; e-mail messages
attachments (see e-mail attachments)
defined, 334
digital signatures, 317, 319
junk (see junk e-mail)
options, 327
securing, 317
signing digitally, 317, 319
e-mail accounts
adding to profiles, 9–10
connecting, xxxvii
different signatures for, 109
grouping messages by, 150
Outlook support for different types, 2
switching between, 10
e-mail addresses
commas, separating with, 329
validating, xli, 9, 82
e-mail attachments, 90
attaching, xlii
encrypting, 320 (see also digital IDs)
grouping messages by, 149
notes, forwarding as, 257
opening, xliiv, 117, 120
e-mail attachments (continued)
previewing, xlv, 117, 119
when replying to messages, 124
restricting permissions for, 321
saving to hard disk, 117
searching, 144
shared (see shared attachments)
switching between messages and, 120
viewing details about, 119

e-mail message window, 75–80

e-mail messages
addressing (see addressing messages)
appointments, creating from, xlv, 134
archiving, xlviii, 169, 172 (see also AutoArchive)
arranging, 148, 151
attaching files to (see attachments)
auto-reply (see auto–reply messages)
autosave settings, 329
background color, 104
blocked content, viewing, 322
business cards (see business cards)
Calendar items, creating from, 131, 134
cancelling, xlii, 88
closing after replying, xlv, 123
collapsing, 61
color categories for (see color categories)
commas as address separators in, 329
courtesy copies, xlii, 82
creating, xli
default appearance of, 100
deleting, xliii, 125, 130
diagrams in (see SmartArt)
displaying in Reading Pane, 115
drafts, saving, 82
encrypting, liii, 320
etiquette, 122
expanding, 61 FILES, attaching (see attachments)
filtering (see rules)
flagging, 98, 131–32
folders (see folders)
font color, 103
font size, 103
formatting text of, liii
forwarding (see forwarding e-mail messages)
graphics in (see SmartArt)
grouping (see grouping messages)
headers, 161
importance of (see importance)
marking as read, xlv, 116, 130
marking as unread, 152
meeting attendees, sending to, 192
moving into folders, 167
new, getting notifications for, 126–27
old, storing, xlviii, 169, 172 (see also AutoArchive)
opening in own window, 115, 120
organizing, xlii (see also folders)
paging through, with Spacebar, 115
plain text, 321
predefined text blocks in (see signatures)
preventing from being forwarded or copied, 99, 322
previewing, 26, 116–18, 153
printing, xlv
read status, xlv, 116, 130, 152
recalling, xlii, 88
receipts, requesting, 99
replacing, after sending, 88
replying to (see replying to e-mail messages)
restricting permissions for, 99
saving, changing automatic settings for, 329
schedule information in, li
sending (see sending messages)
sensitivity of, 98
setup, configuring, lix
signatures in (see signatures)
size, grouping by, 150
SmartArt diagrams in (see SmartArt)
sorting, 151
starting, 75
styles, 101
tables in, 85–86
tasks, creating from, xlv, 131
text, formatting, liii
themes, applying, liii
tracking, 99
unread (see unread messages)
viewing in Reading Pane, consecutively, 115
voting buttons, 99, 122

E-mail Options button, 81
e-mail pane. See Reading Pane
e-mail server, 334
e-mail signatures, 334
e-mail trails, 334
e-mailing
business cards, xlii, 91
calendars (see sharing calendars)
contacts, 91
Edit Business Card dialog box, 51
Edit Rule dialog box, 289
editing
business cards, 51, 52
contacts, xxxviii–xxxix
tasks, 237
Editor Options window, 299, 301
Editor role for delegating, 263
electronic business cards, 49
  background color, applying, 51
e-mailing, xlii, 91
editing, 51–52
graphics, adding, 51
sending to other people, 50
  as signatures, 109
electronic notes. See notes; OneNote
emptying Deleted Items folder, 125
Encrypt Message Contents And Attachments button, 320
encrypted connection not available message, 7
encryption
  defined, 334
  for individual messages, 320
  for recipients without encryption support, 320
  icon indicating, 320
  S/MIME receipts, requesting for, 320
  setting as default, 320
  with digital IDs, lxiv, 318–19
environment, 30
equipment, requesting for meetings, 190
Event tab, 181
event windows
  defined, 176, 334
  opening, 187
  switching between, 180–81
events. See also appointments
  calendars, viewing grouped by, 198
  creating, 180, 187
  defined, 186, 334
  meetings, converting to, 190
  opening, 187
  recurring, xlii, 187–88
  scheduling, xlix
Events view, 198
Exchange Server, 189
  address list, 37, 334
  connecting to, troubleshooting, 7
  e-mail accounts, ability to configure only one, 11
  e-mail accounts, multiple profiles for, 12
  as IMAP account, 7
  Outlook support for, 2
  settings, xxxvii
  sharing folders over, lvi, 262, 268
exercises in book, system requirements for, xxvii
Expand button, 61, 155
Expand The Query Builder button, 146
expanding
e-mail messages, 61
  groups, xlix
Navigation Pane, 21
exporting
  address books, xl, 56
digital IDs, lxiv, 319
external content, blocked, 322
F
Field Chooser window, 26
field codes, 304
fields
  adding/removing, xlii
  in Inbox, adding/deleting, 157–58
  organizing, 151
  reordering, 157
File As field, in contact records, 40
file attachments, 90
  attaching, xlii
  encrypting, 320 (see also digital IDs)
  grouping messages by, 149
  notes, forwarding as, 257
  opening, xlii, 117, 120
  previewing, xlii, 117, 119
  when replying to messages, 124
  restricting permissions for, 321
  saving to hard disk, 117
  searching, 144
  sharing (see shared attachments)
  switching between messages and, 120
  viewing details about, 119
File menu. See Office menu
file name extensions, 90
file types, 90
files, attaching to messages. See attachments
filing messages. See archiving messages
filtering
  e-mail messages (see rules)
  Inbox, xlii, 145
tasks, as you type, 231
flagging messages
  creating tasks with, 132
  outgoing, 98
  setting task due dates when, 131
floating menu bars/toolbars, 24, 334
folders
  archive settings, 172
  available views, displaying, 26
  bold names, 160
folders (continued)
for contact information, xxxix, 38, 53–54
creating, xlvi, 53, 166
delegating control of, 263
displaying, 168
marking for offline use, lix
moving, 316
moving messages into, 167
names, bold, 160
navigating, 25
offline availability, 285
opening, from other user, 266
organizing messages in, 165
permission to view, requesting, 266
permissions, changing, 264
for RSS feeds, 246–47
shared, linking to, 268
SharePoint document libraries as, 272
sharing, lvi, 262
structuring, 165
for tasks, liii, 231
Font button, 102
font color, 103
Font Color button, 103
Font Color gallery, 103
Font dialog box, 37
font size, 103
Font Size button, 103
fonts
applying to text, 103
default, 100
foreign alphabets, 58
Format Painter button, 103
Format Text tab, 36, 80, 179, 228
formatting
collections of (see themes)
copying, 103
default, 100
options for, 100
Quick Styles, 100–101
themes (see themes)
formatting marks, 302
forms
creating, 305
customizing, 305
defined, 334
included with Outlook, 305
installed, accessing, 305
libraries, accessing, 305
Organizational Forms Library, publishing to, 305
properties, 305
publishing, 305
saving, 305
forums, 334. See also newsgroups
Forward button, 124, 202
forwarding e-mail messages, xliv, 121, 124
automatically, when out of the office, lix, 290
(see also auto-reply messages; Out Of Office Assistant)
preventing, lix, 99, 322
specifying signature for, 122
forwarding notes, lvi, 257
free/busy information, 191
freezing menu bar, 23
G
GAL (Global Address List), 37, 334
galleries
Bullets, 85
Colors, 96
Font Color, 103
Layouts, 96
Page Color, 104
Quick Styles, 101
SmartArt Styles, 96
Themes, 105
getting help
with book/companion CD, xxxi
on the Internet, xxxv
with Outlook, xxxi
ScreenTips and, 302, 304
Global Address List (GAL), 37, 334
global formatting
defined, 334
options, 100
glossary terms, formatting of, xxiv
graphics
blocked, downloading, 322
in business cards, 51 (see also business cards)
in e-mail messages (see SmartArt)
placeholders, turning on/off, 304
gridlines, 158
Group By box, 26
group schedules
creating, lvi, 271
defined, 334
viewing, 271
Group Schedules dialog box, 271
grouping messages, 149
by color categories, 161, 164
by sender, 154
### groups
- collapsing, 155
- defined, 334
- Dialog Box Launcher, 32, 36, 99
- expanding/collapsing, xlvi

### H

#### hard disk requirements for Office 2007, xxvii

#### headers
- adding, 140
- color-coding, 161

#### help
- with book/companion CD, xxxi
- on the Internet, xxxv
- with Outlook, xxxi
- ScreenTips and, 302, 304

#### hiding
- appointments, 184
- Field Chooser window, 26
- Navigation Pane, 21
- Reading Pane, 25
- Ribbon, 79
- tabs, 79
- High importance, 98
- holidays, I, 203

#### HTML message format, 80, 335

#### HTTP
- connecting Outlook over, lvii, 279
- defined, 335
- e-mail accounts, 307

#### hyperlinks in notes, 253

#### Hypertext Markup Language (HTML) message format, 80, 335

#### Hypertext Transfer Protocol (HTTP)
- connecting Outlook over, lvii, 279
- defined, 335
- e-mail accounts, 307

### I

#### icons
- for digital signatures, 319
- for encrypted messages, 320
- for new mail, 126
- for recurring events, 188
- for toolbar buttons, xxiv

#### images
- blocked, downloading, 322

- in business cards, 51 (see also business cards)
- in e-mail messages (see SmartArt)
- placeholders, turning on/off, 304

#### IMAP message format, 80, 335

#### Import And Export Wizard, 56

#### Import/Export Digital ID dialog box, 319

#### importance, 98
- default, changing, 329
- defined, 335
- grouping messages by, 150

#### Important paragraphs, xxiv

#### importing
- contact records, 56
- digital certificates, 7
- digital IDs, lxiv, 319
- SharePoint Contacts List, xli, 31

#### Inactive Message flag, 132

#### Inbox
- conversations in, 149
- default settings, restoring, xlvi
- fields in, 157–58
- filtering, xlvi
- filtering to display search results, 145
- grid lines, customizing, 158
- searching in, 145
- sorting, by category, xlvii
- threaded conversations in, 149

#### Inbox Properties dialog box, 171

#### incomplete tasks, 241

#### index of book, how to use, xxiii

#### Information Rights Management (IRM), 321.
- See also permissions

#### Insert Business Card button, 91

#### Insert Business Card dialog box, 91

#### Insert File dialog box, 89

#### Insert SmartArt button, 92

#### Insert tab, 35, 79, 179, 228

#### inserting
- business cards, in messages, 91
- files, in e-mail messages (see attachments)
- signatures, xliii
- SmartArt, in messages, 92
- tables, 85

#### Install Certificate button, 7

#### installing
- digital certificates, 7
- practice files, xxviii
- printers, 140, 208

#### Instant Search, xlvi, 62, 144. See also searching
- contacts, finding with, xl
- implementing, 145

#### interface elements in exercises, formatting of, xxiv

#### internal addresses, addressing messages to, 81
Internet Accounts dialog box, 251
Internet calendars, 216
Internet calls, 44
Internet Message Access Protocol (IMAP), 80, 335
Invite Attendees button, 181
inviting meeting attendees, 182. See also meetings
IRM (Information Rights Management), 321. See also permissions

J
Journal
activating, 256
defined, 335
displaying, lv, 256
recording activities with, lv
Journal button, lv, 256
Journal Options dialog box, 256
junk e-mail, 323
defined, 335
deleting automatically, 325
level of protection, selecting, 324
notifications of receipt, 322
Web beacons, 322
Junk E-Mail Filter, lxiv, 323
Junk E-Mail Options dialog box, 324

K
keyboard shortcuts
assigning to color categories, 163
available, 298
defined, 335
in ScreenTips, turning on/off, 304

L
languages, displaying additional, 58
Large Mail folder, 160
Layouts gallery, 96
libraries, document, 272–73. See also document workspaces
linking
calendars, to OneNote, 216
contacts, to notes, 254
OneNote notes, to Outlook, 243
to shared folders, 268
lists
changing level in, 85
creating, 84
promoting/demoting list items in, 85
local formatting, 335
Location Information dialog box, 40
logos on business cards, 51. See also business cards
Low detail level, setting in calendar, 202

M
Mail dialog box, 15, 16
Mail module, 74
Mail Setup dialog box, 14
mailbox, viewing size of, 169
Mailbox Cleanup, 169
mailing address, specifying default for contacts, 41
maps of contact addresses, displaying, 44
Mark Complete button, 241
marketing communications, distributing with
    Business Contact Manager, 13
marking e-mail messages as read, 116
    manually, xliv
    with desktop alerts, xliv, 130
marking tasks as complete, liv, 241
Medium detail level, setting in calendar, 202
meeting requests
    accepting, 192, 195
    attendee status, 191
    creating, 44, 190
    declining, 192, 195
defined, 188, 335
delivering to delegate, lii, 220
Optional Attendee status, 191
Required Attendee status, 191
for resources, 188
responding to, xlix, l, 192, 194–195
scheduling, 191
sending, xlix
status, of attendees, 191
tentative bookings, 191
Meeting tab, 181
meeting window, 176, 182, 335
Meeting Workspace button, 193
meeting workspaces, 193, 335
meetings
    addressing to currently selected contact, 26
    attendees, adding, 191
    conflicting appointments, viewing, 194
creating, 181
events, converting to, 190
Exchange Server 2007 and, 189
inviting attendees, 182
modifying, 192
proposing new time for, l, 192, 194
requesting (see meeting requests)
rescheduling, 190
scheduling, 188
time, changing, 191
updating, 190
memory requirement for Office 2007, xxvii
menu bar
docking, 23
dragging, 23
floating, 24
moving, 23
menus
closing, 35
collapsing, 178
new organization of, xii
Message button, 118
message headers
adding, 140
color-coding, 161
defined, 335
message importance, 98
default, changing, 329
defined, 335
grouping messages by, 150
Message tab, 78
message window
defined, 74, 335
opening, 75
Ribbon (see Ribbon)
messages, e-mail
addressing (see addressing messages)
appointments, creating from, xlvi
archiving, xlviii, 169, 172 (see also AutoArchive)
arranging, 148, 151
attaching files to (see attachments)
auto-reply (see auto-reply messages)
autosave settings, 329
background color, 104
blocked content, viewing, 322
business cards (see business cards)
Calendar items, creating from, 131, 134
cancelling, xlii, 88
closing after replying, xlv, 123
collapsing, 61
color categories for (see color categories)
commas as address separators in, 329
courtesy copies, xlii, 82
creating, xli
default appearance of, 100
deleting, xlv, 125, 130
delivery options, 99
diagrams in (see SmartArt)
displaying in Reading Pane, 115
drafts, saving, 82
encrypting, lxiii, 320
etiquette, 122
expanding, 61
files, attaching (see attachments)
filtering (see rules)
flagging, 98, 131–32
folders (see folders)
font color, 103
font size, 103
formatting text of, xliii
forwarding (see forwarding e-mail messages)
grapics in (see SmartArt)
grouping (see grouping messages)
headers, 161
importance of (see importance)
making as read, xlv, 116, 130
marking as unread, 152
meeting attendees, sending to, 192
moving into folders, 167
new, getting notifications for, 126–27
old, storing, xlviii, 169, 172 (see also AutoArchive)
opening in own window, 115, 120
organizing, xlv (see also folders)
paging through, with Spacebar, 115
plain text, 321
predefined text blocks in (see signatures)
preventing from being forwarded or copied, 99, 322
previewing, 26, 116–18, 153
printing, xlv
recalling, xlii, 88
receipts, requesting, 99
replacing, after sending, 88
replying to (see replying to e-mail messages)
restricting permissions for, 99
saving, changing automatic settings for, 329
schedule information in, li
sending (see sending messages)
sensitivity of, 98
setup, configuring, lxv
signatures in (see signatures)
size, grouping by, 150
SmartArt diagrams in (see SmartArt)
messages, e-mail (continued)
starting, 75
styles, 101
tables in, 85–86
tasks, creating from, xlv, 131
text, formatting, xlii
themes, applying, xliii
tracking, 99
unread (see unread messages)
viewing in Reading Pane, consecutively, 115
voting buttons, 99, 122
Microsoft Exchange dialog box, 279
Microsoft Exchange Proxy Settings dialog box, 279
Microsoft Exchange Server, 189
address list, 37, 334
connecting to, troubleshooting, 7
defined, 335
e-mail accounts, ability to configure only one, 11
e-mail accounts, multiple profiles for, 12
as IMAP account, 7
Outlook support for, 2
settings, xxxvii
sharing folders over, lvi, 262, 268
Microsoft Knowledge Base, xxxv
Microsoft Office 2007, xxvi
Microsoft Office Button, 30, 335
Microsoft Office OneNote
calendars, linking to, lii, 216
contacts, linking to, xlii, 71
moving pages in, 168
notes in, linking to Outlook, 243
notes in, moving, 216
sending e-mail messages to, xlviii, 168
Microsoft Office SharePoint Server 2007
document libraries, lvii, 272-73
Microsoft Office Outlook
automatic setup, 3
customizing, lxi, 301
e-mail accounts supported by, 2
Inbox (see Inbox)
left pane, 21, 199
Navigation Pane, 21, 199
profiles (see profiles)
setting up, 3, 7
starting, 3
uses for, xi
Microsoft Press Knowledge Base, xxxi
Microsoft Product Support Services, xxxv
Microsoft Windows SharePoint site, 193
Microsoft Windows XP
dialog boxes in, navigating, xvii
practise files, managing, xv
Start menu, xvi
starting Outlook on, xvi
virtual private network (VPN) connection, setting up under, lviii, 282
Mini toolbar, 102, 302, 335
Minimize button, 31
minimizing
Daily Task List, 230
Navigation Pane, 21
To-Do Bar, 21, 230
Mobile Address Book, 38, 335
modules, defined, 335
monitor requirements for Office 2007, xxvii
Monthly Style for printed calendars, 207
Move Items dialog box, 167
Move Or Copy Pages dialog box, 216
Move Up button, 300
moving
appointments, 183
desktop alert location, 129
menu bar, 23
messages, into folders, 167
Quick Access Toolbar, 76
Reading Pane, 22
Ribbon, 77

N
name bar, 31
names, contact. See contacts
naming profiles, 15
navigating
calendars, 199, 202
contacts, 58
folders, 25
Navigation Pane
expanding, 21
minimizing, 21
widening, 199
networking. See sharing
New Appointment button, 177, 190
New Contact button, 33, 40, 47
New Mail Message button, 75, 83, 89, 129, 329
New Mail Message icon, 126
new mail notifications, 126–27
new messages. See unread messages
New Note button, 253
New Outlook Data File dialog box, 314
New Profile dialog box, 15
New Signature dialog box, 108
New Task button, 226, 236
News command on toolbar, 250
news feeds
deleting, 248
folders for, 246–47
readers for, 246
removing, liv
subscribing to, liv, 248
updating, 246
viewing available, 247
newsgroups
accessing, 250
adding, 251
defined, 335
reading, 250
newsreaders, defined, 250
notes, 251. See also OneNote
closing, 253
color, 252
contacts, adding to, lv, 254
creating, lv, 253
default settings, 252
defined, 335
displaying, 252
files, saving as, 257
formatting, lv
forwarding, lv, 257
hyperlinks in, 253
opening, lv
Reading Pane and, 252
saving, 253
saving, as files, lv
searching in, 252
sharing, 257
text, adding, 253
views for, 251
Notes About This Item button, 216
Notes button, 252
notification of new e-mail messages, 126–27
notification windows. See desktop alerts
numbered steps, formatting conventions of, xxiv

Office 2007 system requirements, xxvi
Office Button, 30, 335
Office menu, 30, 178
Office Online Web site, 217
offline address books, 286, 336
offline content
defined, 283
download options, 284
files in document libraries, 273
Offline Server Documents, 273
OneNote. See also notes
calendars, linking to, lii, 216
contacts, linking to, xli, 71
moving pages in, 168
notes in, linking to Outlook, 243
notes in, moving, 216
sending e-mail messages to, xlvi, 168
opening
appointment window, 177, 184
attachments, xliv, 117, 120
contact records, 42
Control Panel, 14
data files, lxiii, 316
e-mail messages, in own window, 115, 120
events, 187
folders, from other user, 266
message window, 75
notes, lv
Outlook, 3
Personal Folders files, 316
Print Preview, 137
task window, 235
Open Other User’s Folder dialog box, 266
OPEN paragraphs, xxiv
operating system version required for Office 2007, xxvii
Optional Attendee status, 191
Options dialog box, 107, 127, 169, 327
Options tab, 79
Organizational Forms Library, 305
organizations, addressing messages within, 81
Other Actions button, 88
Other Settings dialog box, 158
Out Of Office Assistant. See also auto-reply messages
defined, 336
Exchange Server 2003 features, 288
Exchange Server 2007 features, 292
using to set time as, 158
Out Of Office Assistant dialog box, 288, 292
Outlook
automatic setup, 3
with Business Contact Manager, 13
customizing, lx, 301
e-mail accounts supported by, 2
Inbox (see Inbox)
Navigation Pane, 21, 199
Outlook (continued)
profiles (see profiles)
setting up, 3, 7
starting, 3
uses for, xi
Outlook 2007 Standard Forms Library, 305
Outlook 2007 Startup wizard, xxxvii, 3
Outlook 2007 with Business Contact Manager, 13
Outlook Address Books, defined, page 336
Outlook Anywhere, lxii, 279, 336
Outlook Data Files view, 199
Outlook forms
creating, 305
customizing, 305
included with Outlook, 305
installed, accessing, 305
libraries, accessing, 305
Organizational Forms Library, publishing to, 305
properties, 305
publishing, 305
saving, 305
Outlook Today page, 25
Outlook Web Access (OWA), 283
Outlook with Business Contact Manager, 13
Outlook Rich Text Format (RTF), defined, 336
Overlay mode, viewing multiple calendars in, 219
Overtype mode, 304
overview page, 25
OWA (Outlook Web Access), 283

P
page color, 104
Page Color button, 104
Page Color gallery, 104
Page Setup button, 138
Page Setup dialog box, 138, 209
Paste Options button, 304
people. See contacts
permissions. See also Information Rights Management (IRM)
for calendars, delegating, liii, 20
defined, 336
restricting, 99
for sharing folders, 262
for subfolder creation, granting, 263
to view folders, requesting, 266
Personal, setting messages as, 98
Personal Folders files
backing up, 314
creating, lxii, 56, 314
defined, 336
expanding, 316
exporting to older version of Outlook, 315
folders, moving to, 316
folders in, default, 316
moving messages to, lxii
opening, 316
personalizing. See customizing
phishing messages, 323, 336. See also junk e-mail
Phone List view, 57
phone lists, xl. See also contacts
phone numbers, 40
pictures
blocked, downloading, 322
in business cards, 51 (see also business cards)
in e-mail messages (see SmartArt)
placeholders, turning on/off, 304
sending, 90
plain text messages, lxiii, 80, 321, 336
Plan A Meeting dialog box, 26
pop-up toolbars, 102, 302
pop-up windows for alerts. See desktop alerts
POP3, 336
populating distribution lists, 46, 48. See also contacts
Post-It Notes. See notes
Post Office Protocol 3 (POP3), 336
practice files, xxv
installing, xxviii
in Windows XP, location of, xv
Preview button, 208
previewing
attachments, xliv, 117, 119
e-mail messages, 26, 116–17, 153
as printed (see Print Preview)
Print button, 66, 208
Print dialog box, 66, 137, 208
Print Preview
opening, 25, 67, 137, 208
scrolling, 210
Print Preview button, 67
print styles, 137, 210, 336
printer installation, 140, 208
printing
address cards, xli
calendars, li
contacts, selected, 70
e-mail messages, xlv
phone lists, xl
printing calendars, 207
date range, selecting, 210
default styles for, 207
previewing (see Print Preview)
print styles, 210
printer, selecting, 209
printing e-mail messages
with default options, 137
headers for, 140
paper options, 139
print styles, 137
printing range, selecting, 67
priority. See importance
privacy, 322
Private, marking items as, 98, 184
Private button, 184
private stores, 314, 336
process diagrams. See SmartArt
processor requirement for Office 2007, xxvii
profiles
adding, 15
adding e-mail accounts to, 9–10
choosing, when prompted, 16
creating, xxxviii
displaying current, 14
multiple, 12
naming, 15
prompting for on startup, xxxviii, 16
renaming, 15
setting as default, 12, 17
storage location of, 12
switching between, 14
program interface elements in exercises,
formatting of, xxiv
projects, organizing with Business Contact
Manager, 13
promoting bulleted list items, 85
Propose New Time dialog box, 195
Propose Time button, 195
proposing new meeting time, 192, 194
protecting e-mail, 317. See also digital
signatures; encryption; plain text messages;
Information Rights Management (IRM)
protecting privacy, 322
.pst files
backing up, 314
creating, lxii, 56, 314
expanding, 316
exporting to older version of Outlook, 315
folders, moving to, 316
folders in, default, 316
moving messages to, lxii
opening, 316
publishing
calendars, 212
forms, 305
Q
Quick Access Toolbar, 30, 298
adding items to, in contact window, 31
buttons, adding, lx, 299
buttons, moving, 300
buttons, removing, 301
commands on, 31
commands on, adding, 77
customizing, 76, 299
defined, 336
moving, 76–77
Quick Click categories, 161
Quick Launch bar. See Quick Access Toolbar
Quick Print, 137
Quick Reference, how to use, xxiii
Quick Styles, 100, 336
Quick Styles gallery, 101
R
RAM requirement for Office 2007, xxvii
reading newsgroups, 250
Reading Pane
closing, 23
displaying, 230
displaying messages in, 115
moving, 22
notes and, 252
position of, 115
previewing attachments in, 117, 119
previewing e-mail messages in, 118
task details in, 234
turning on/off, 25
viewing consecutive messages in, 115
Really Simple Syndication (RSS) feeds
defined, 336
deleting, 248
folders for, 246–47
readers for, 246
removing, liv
subscribing to, liv, 248
updating, 246
viewing available, 247
Rearrange Commands dialog box, 306
rearranging. See sorting
Recall This Message dialog box, 88
recalling messages, xlii, 88, 336
receipts for delivery, 99
recent searches, viewing, 64
recipients, grouping messages by, 150
reclaiming declined tasks, 239
recording activities. See Journal
records, contact. See also contacts
addressing messages from, 44
assigning tasks from, 44
Business Card area (see electronic business cards)
Display As box, 40
File As field, 40
maps of contact addresses, displaying, 44
meeting requests, creating from, 44
placing Internet calls from, 44
Web sites, displaying from, 44
Recurrence button, 185, 187
recurring, defined, 336
recurring appointments, 182, 185, 188
Recurring Appointments view, 198
recurring events
creating, xlix, 187
default settings, 187
icon indicating, 188
refining searches, 146. See also searching
relocating the Ribbon, 77
Reminder button, 184
reminders
for appointments, 182, 184
defined, 336
deleting, 240
dismissing, 233
setting, 98, 232, 236
setting snooze for, 233
for tasks, 239
turning off, liv
remote connections, 278
remote procedure calls (RPC), defined, 336
Rename Category dialog box, 45
renaming
color categories, xlvii, 162
profiles, 15
Search Folders, xlvii
reordering
columns, 157
contacts, xl
contacts, by column, 59
e-mail messages, 151
task lists, 230
repeating appointments, 182, 185, 188
replacing messages after sending, 88
reply address, alternative, 99
Reply button, 123
replying to e-mail messages, xliv
all recipients included, 121
attachments and, 124 (see also attachments)
automatically (see auto-reply messages; Out Of Office Assistant)
closing message after, xlv, 123
preventing, lxiii
Reply To All function, disabling for recipients, 122
specifying signature for, 122
Request A Delivery Receipt command, 300
requesting meetings. See meeting requests
Required Attendee status, 191
resending messages, 88, 337
Reset Current View button, 157
resetting
calendars, to default display, 201
toolbars, to default, 307
views, to original settings, 159
resolving, defined, 337
resolving e-mail addresses, xli, 9, 82
resources, requesting for meetings, 188
responding to e-mail messages, xlv
all recipients included, 121
attachments and, 124 (see also attachments)
automatically (see auto-reply messages; Out Of Office Assistant)
closing message after, xlv, 123
preventing, lxiii
Reply To All function, disabling for recipients, 122
specifying signature for, 122
Restore Down/Maximize button, 31
restoring Inbox to default settings, xlvii
restricting message permissions, 99
retention policies, 169
Return To Task List button, 239
Reviewer role for delegating, 263
Ribbon, xii, 32, 78. See also tabs
in calendar item windows, 179–181
in contact window, 35–37
defined, 337
hiding, 79
in message window, 76–80
moving, 77
in task window, 228
Rich Text Format (RTF) files, 80
defined, 337
saving notes as, 257
RPC (remote procedure calls), defined, 336
RPC over HTTP. See Outlook Anywhere
RSS feeds
- deleting, 248
- folders for, 246–47
- readers for, 246
- removing, li
- subscribing to, li, 248
- updating, 246
- viewing available, 247
RSS Feeds folder, 247
RSS Subscriptions folder, 247
RTF files, 80
- defined, 337
- saving notes as, 257
rules, 307
- actions, specifying, 310
- client, 307
- creating, lii, 308
- criteria, specifying, 309
- defined, 337
- HTTP e-mail accounts and, 307
- managing, 26
- running, 312
- saving, 312
- server, 307
- templates for, 309
Rules And Alerts dialog box, 26, 310, 312
Rules And Alerts window, 308
Rules wizard, 308

S
safeguarding e-mail, 317. See also digital signatures; encryption; plain text messages; Information Rights Management (IRM)
Safe Recipients List, 322, 325
Safe Senders List, 322, 325
sales metrics, reviewing with Business Contact Manager, 13
sans serif, 337
Save & Close button, 41, 46, 184, 188, 236
Save As dialog box, 257
Save As Web Page dialog box, 212
saved addresses. See contacts
saving
- attachments, to hard disk, 117
- calendars, as Web pages, lii, 212
- forms, 305
- message drafts, lix, 82, 329
- notes, lii, 253, 257
- rules, 312
- sent messages, 83
scams. See junk e-mail; phishing messages
schedules, group
- creating, li, 271
- defined, 334
- viewing, 271
scheduling
- appointments, lix
- auto-reply messages, lx
- events, lixi
Scheduling button, 191
scheduling events and appointments. See appointments; events
screen resolution minimum for Office 2007, xxvii
ScreenTips
- defined, 337
- keyboard shortcuts displayed in, turning on/off, 304
- style, setting, 302
Search Folders
- creating, 160
- custom, liv
- customizing, lix, 160
- displaying, 160
- modifying messages in, 160
- renaming, liv
- updating, 160
Search Options dialog box, 64
Search Text dialog box, 310
searches
- clearing, 148
- criteria, adding, 146
- folders for (see Search Folders)
- messages no longer appearing in, 148
- refining, 146
- results, displaying in folder (see Search Folders)
searching. See also Instant Search
- address books, liii
- attachments, 144
- clearing results of, 64
- contacts, xl, 63
- folders, all, 148
- Inbox, 145
- narrowing results of, 145
- notes, 252
- recent searches, 64
- setting options for, 64
- for tasks, 231
Secure Multipurpose Internet Mail extensions (S/MIME), 317, 337
securing e-mail, 317. See also digital signatures; encryption; plain text messages; Information Rights Management (IRM)

Security Alert message box, 7
security certificates, 7
See Also paragraphs, xxiv
Select Contacts dialog box, 254
Select Members button, 47
Select Members dialog box, 47
Send A Calendar Via E-mail dialog box, 214
Send button, 53, 87, 90, 192, 239, 258, 267
Send Status Report button, 240
Send To OneNote button, 168
senders, grouping messages by, 150, 154
sending address books, xl, 56
sending calendars as e-mail, li
  customizing level of detail for, 213
date range, selecting, 214
  on the Web, 212
sending messages, xli, 87. See also e-mail messages
  configuring, lxv
courtesy copies, xlii, 82
to meeting attendees, 192
from multiple accounts, 10
to OneNote, xlvi, 168
from Sent Items folder, 88
sensitivity, 98, 337
Sent Items folder, 88
sent messages, saving, 83
server certificates, 7
server configuration, 5, 8
server rules, 307, 337
Service Sign-Up dialog box, 321
Set Quick Click dialog box, 131
setting up
  Outlook, 3, 7
  server settings, 5, 8
shared attachments, 87
  creating document workspaces with, 269
defined, 337
  sending, lvii, 270
shared meeting sites, 193
shared resources, 190
SharePoint calendars, 274
SharePoint Contacts List, xli, 31
SharePoint document libraries
  connecting to Outlook, lvii, 273
editing offline, 273
  as folders, 272
offline files, editing, 273
previewing items in, 273
read-only items in, 273
SharePoint Lists folder, 273
SharePoint meeting workspaces, 193
SharePoint sites, connecting to, lvii, 272
sharing
  address books, xl, 53
  contacts folders, 53
documents, lvii, 269–70, 272–73
  folders, lv, 262
notes, 257
permissions for, changing, 264
sharing calendars, li
  customizing level of detail for, 213
date range, selecting, 214
  on the Web, 212
Show As button, 184
Show Bcc button, 82
Show Fields dialog box, 151, 157
showing. See displaying
signatures
  associating with accounts, 109
  business cards as, 109
  creating, xliii, 106–107
default, setting, 109
defined, 337
deleting from messages, 110
formatting, 108
including by default, 109
inserting, xliii
  multiple, for different accounts, 109
specifying different for replies and forwards, 122
Signatures And Stationery dialog box, 107
Signatures button, 107
signing e-mail digitally. See digital IDs; digital signatures
Single Key Reading Using Space Bar option, 115
size, grouping messages by, 150
smart cut and paste, 304
Smart Tags, 304
SmartArt
  defined, 337
  inserting in messages, xlii–xliii, 92
shapes, adding, 94
text, adding, 94
Text Pane, displaying, 93
SmartArt Styles gallery, 96
S/MIME (Secure Multipurpose Internet Mail extensions), 317, 337
sorting
  columns, 157
contacts, xl, 59
e-mail messages, 151
task lists, 230
sounds for new mail notifications, 127
spam, 323
  defined, 337
deleting automatically, 325
level of protection, selecting, 324
notifications of receipt, 322
Web beacons, 322
standard color categories, 44
Standard Forms Library, 305
start dates, grouping messages by, 150
starting
e-mail messages, 75
  Outlook, on Windows Vista, 3
  Outlook, on Windows XP, xvi
Startup wizard, xxxvii, 3
status, task, 237. See also tasks
Step by Step series conventions, xxiii
sticky notes. See notes
storing old messages. See archiving messages
street addresses
  checking validity of, 41
  displaying maps of, 44
  entering, for contacts, 40
structuring folders, 165
Style Sets, 101
styles, changing all, 101
subfolders, creating, 263
subjects, grouping messages by, 150
subscribing
to Internet calendars, 217
to newsgroups, 250–51
to RSS feeds (see RSS feeds)
suppressing. See hiding
Swap Time Zones button, 207
switching
  between e-mail accounts, 10
  between profiles, 14
synchronizing, 337
system requirements for Office 2007, xxvi
defined, 337
double-clicking, 78
Event, 181
Format Text, 36, 80, 179, 228
hiding, 79
hiding commands on, 78
Insert, 35, 79, 179, 228
Meeting, 181
Message, 78
Options, 79
Task, 228
task creation, liii, 226, 232, 234–36
  from e-mail messages, xlv, 131
  by flagging messages, 132
task list, 337. See also To-Do List
Task Options dialog box, 232
task originator, defined, 337
task owner, defined, 337
task reminders
deleting, 240
setting, 232, 236
setting snooze for, 233
task requests, 238–39. See also assigning tasks
task status
color, changing default settings for, 232
due dates, changing, 231, 234
due dates, setting, xlv, 131, 236
due each day, displaying, 230
due dates, changing, 231, 234
due dates, setting, xlv, 131, 236
due each day, displaying, 230
filtering as you type, 231
flagging for completion This Week, 235
due dates, changing, 231
folders, creating for, liii
incomplete, displaying, 241
information for inclusion in, 232
marking as complete, liv, 240–41
modifying, 232
percentage complete, changing, 237
Reports, sending, liv
updating, liv
Task tab, 228
task window, 224, 235, 337
tasks
assigning to others (see assigning tasks; task requests)
availability of, 231
categories, changing, 235
color, changing default settings for, 232
completed, displaying, 241
declined, reclaiming, 239
delegating, liii
deleting, liv, 240, 242
details, displaying, 236
due dates, changing, 231, 234
due dates, setting, xlv, 131, 236
due each day, displaying, 230
filtering as you type, 231
flagging for completion This Week, 235
due dates, changing, 231
folders, creating for, liii
incomplete, displaying, 241
information for inclusion in, 232
marking as complete, liv, 240–41
modifying, 232
percentage complete, changing, 237
Reports, sending, liv
updating, liv
Task tab, 228
Task window, 224, 235, 337
T

Table button, 85
table of contents, how to use, xxiii
Tables
  entering information in, 86
  inserting, 85
tabs, 32, 298. See also Ribbon
  Appointment, 179
  Business Tools, 35
  Contact, 35
  contextual, 86
tasks (continued)
reordering, 230
searching for, 231
status of, 237
To-Do List, removing from, 240
updating, lii, 237
viewing, 229
views, 229–30
Tasks button, 133, 225
team calendars, 274
templates
for message formatting (see themes)
for rules, 309
text
converting to bulleted list, 84
copied, choosing source or destination
formatting for, 304
copying formatting of, 103
fonts for, 100, 103
text animation, 304
text files, notes as, 257
text messages, liii, 80, 321
Text Pane button, 93
text wrapping, 304
themes
applying, xliii, 104
modifying, 105
Themes button, 104
Themes gallery, 105
third-party add-ins, defined, 337
threaded conversations, 149, ee7
thumb tabs in book, how to use, xxiii
time periods in Calendar, switching between, 198
time slots, appointment, 183. See also appointments
Time Zone dialog box, 206
time zones
appointments, scheduling across, 180
changing, li, 206
displaying multiple, li, 206
setting, 181
switching between, 207
Time Zones button, 180
timelines, creating. See Journal
Tip paragraphs, xxiv
title bar, 31, 337
To-Do Bar, 224
closing, 22
customizing, 22
minimizing, 21, 230
tasks on, 225
To-Do List, displaying on, 230
To-Do Bar Options dialog box, 22
To-Do List
defined, 338
increasing space allotted to, 230
link with Calendar, 223
tasks, removing from, 240
To-Do Bar, displaying on, 230
Toolbar Options button, 250, 306
toolbars
buttons on, li, 306
commands, rearranging, li
displaying, 24
floating, 24
Mini, 102, 302
new organization of, xii
primary (see Ribbon)
Quick Access (see Quick Access Toolbar)
resetting to default, li, 307
tracking
activities (see Journal)
changes, 304
messages, 99
Tri-fold Style for printed calendars, 207
troubleshooting setup, 7
Trust Center, 317–21, 323
turning off
AutoPreview, 26
desktop alerts, xliiv, 128
reminders, li
turning on AutoPreview, 117, 153
type, grouping messages by, 150

U
Undo button, 26
undoing, 26
Unicode character sets, defined, 338
Unified Messaging, 284
Uniform Resource Locators (URLs), 338
units of measurement, 304
Unread Mail folder, 160
unread messages
appearance of, 115, 153
cursor changing to indicate, 329
displaying only, 155
marking messages as, 152
updating
meetings, 190
RSS feeds, 246
Search Folders, 160
tasks, lii, liv, 237
W

warnings for appointments, 182, 184
Ways To Organize pane, 230
Web beacons, 322, 338
Web logs, 246, 333. See also RSS feeds
Web pages
  publishing calendars as, lii, 212
  viewing, from contact records, 26
Web sites
  blogs, 246, 333 (see also RSS feeds)
  displaying from contact records, 44
Web toolbar, 25
week numbers, displaying in calendar, 199
Weekly Style for printed calendars, 207
weeks. See work week
Windows XP
  dialog boxes in, navigating, xvii
  practice files, managing, xv
  Start menu, xvi
  starting Outlook on, xvi
  virtual private network (VPN) connection,
    setting up under, lviii, 282
wizards
  Rules, 308
  Startup, 3
work day, setting, 205
work week
  default, 204
  defined, 338
  displaying, 201, 204
  setting, li, 205
Work Week view, 198
working offline, 283–84
workspaces, document, lvii, 269–70, 272–73
wrapping text, 304

X

XP. See Windows XP
What do you think of this book?

We want to hear from you!

Do you have a few minutes to participate in a brief online survey?

Microsoft is interested in hearing your feedback so we can continually improve our books and learning resources for you.

To participate in our survey, please visit:

www.microsoft.com/learning/booksurvey/

...and enter this book’s ISBN-10 or ISBN-13 number (located above barcode on back cover*). As a thank-you to survey participants in the United States and Canada, each month we’ll randomly select five respondents to win one of five $100 gift certificates from a leading online merchant. At the conclusion of the survey, you can enter the drawing by providing your e-mail address, which will be used for prize notification only.

Thanks in advance for your input. Your opinion counts!

* Where to find the ISBN on back cover

Example only. Each book has unique ISBN.