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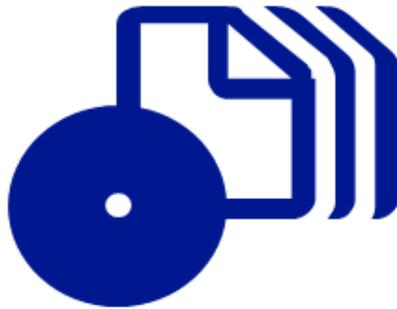
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**Microsoft® Office
Outlook® 2007
Step by Step**

*Joan Preppernau
Joyce Cox
Online Training Solutions, Inc.*

PUBLISHED BY

Microsoft Press

A Division of Microsoft Corporation

One Microsoft Way

Redmond, Washington 98052-6399

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Library of Congress Control Number: 2006937019

Printed and bound in the United States of America.

1 2 3 4 5 6 7 8 9 QWT 2 1 0 9 8 7

Distributed in Canada by H.B. Fenn and Company Ltd.

A CIP catalogue record for this book is available from the British Library.

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Acquisitions Editor: Juliana Aldous Atkinson

Project Editor: Sandra Haynes

Body Part No. X12-64023

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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:



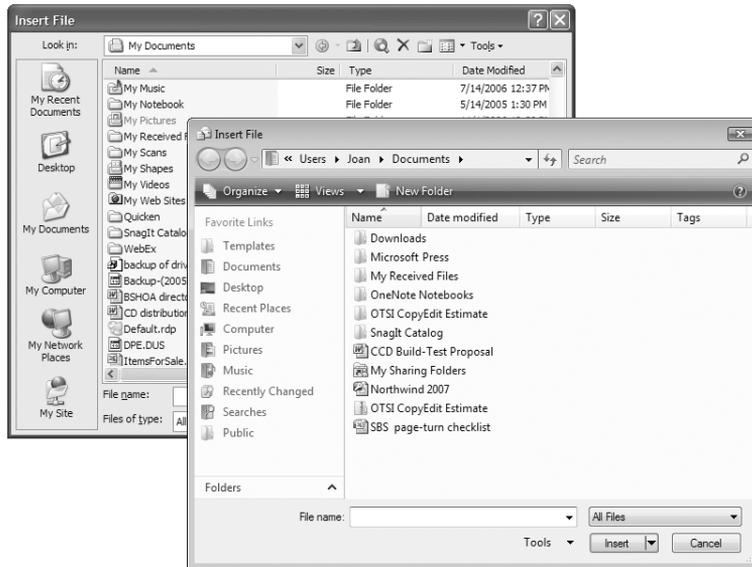
- Click the **Start** button, point to **All Programs**, click **Microsoft Office**, and then click **Microsoft Office Outlook 2007**.

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.



Up One Level

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:

www.microsoft.com/learning/mcp/msbc/

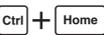
Features and Conventions of This Book

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.

| Convention | Meaning |
|---|--|
|  | This icon at the end of a chapter introduction indicates information about the practice files provided on the companion CD for use in the chapter. |
| USE | This paragraph preceding a step-by-step exercise indicates the practice files that you will use when working through the exercise. |
| BE SURE TO | 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. |
| OPEN | This paragraph preceding a step-by-step exercise indicates files that you should open before beginning the exercise. |
| CLOSE | This paragraph following a step-by-step exercise provides instructions for closing open files or programs before moving on to another topic. |
| 1 2 | Blue numbered steps guide you through step-by-step exercises and Quick Reference versions of procedures. |
| 1 2 | Black numbered steps guide you through procedures in sidebars and expository text. |
| → | An arrow indicates a procedure that has only one step. |
| See Also | These paragraphs direct you to more information about a given topic in this book or elsewhere. |
| Troubleshooting | These paragraphs explain how to fix a common problem that might prevent you from continuing with an exercise. |
| Tip | These paragraphs provide a helpful hint or shortcut that makes working through a task easier, or information about other available options. |
| Important | These paragraphs point out information that you need to know to complete a procedure. |
|  Save | 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. |
|  | In step-by-step exercises, keys you must press appear as they would on a keyboard. |
|  | 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  +  ” means “hold down the  key while you press the  key.” |
| 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> 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.

| Chapter | Folders\Files |
|---|--|
| Chapter 1: Getting Started with Outlook 2007 | None |
| Chapter 2: Managing Contact Information | <i>ManagingContacts\FourthCoffee.png</i> |
| Chapter 3: Sending E-Mail Messages | <i>SendingMessages\Attaching.docx</i> <i>SendingMessages\Attaching.pptx</i> |
| Chapter 4: Handling E-Mail Messages | None |
| Chapter 5: Managing Your Inbox | None |
| Chapter 6: Managing Appointments, Events, and Meetings | None |
| Chapter 7: Managing Your Calendar | None |
| Chapter 8: Tracking Tasks | None |
| Chapter 9: Gathering Information | None |
| Chapter 10: Collaborating with Other People | None |
| Chapter 11: Working Away from Your Office | None |
| Chapter 12: Customizing and Configuring Outlook | None |

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

No one edition of the 2007 Office system installs all of the above programs. Specialty programs available separately include Microsoft Office Project 2007, Microsoft Office SharePoint Designer 2007, and Microsoft Office Visio 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

The 2007 Microsoft Office suites, including Office Basic 2007, Office Home & Student 2007, Office Standard 2007, Office Small Business 2007, Office Professional 2007, Office Ultimate 2007, Office Professional Plus 2007, and Office Enterprise 2007, all have similar requirements.

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:

- Outlook 2007, PowerPoint 2007, and Word 2007
- 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>.

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**.

8. Close the **Step by Step Companion CD** window.
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:

<http://www.microsoftpressstore.com/title/9780735623002>.

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.

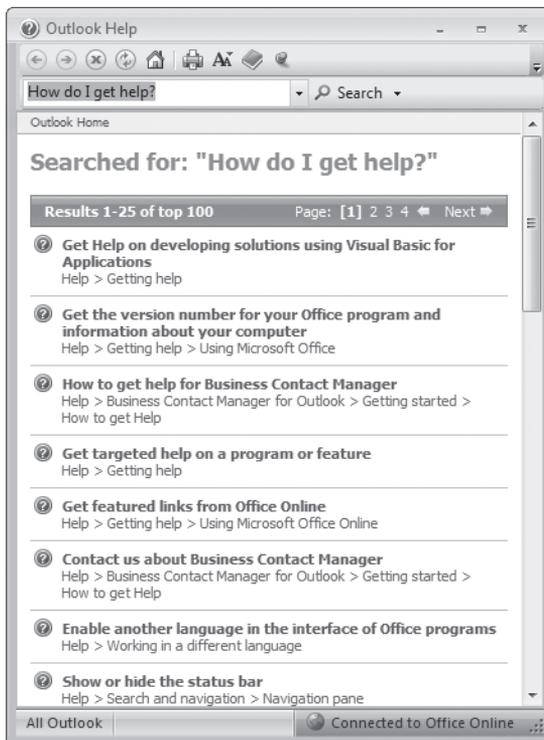
- In a dialog box, you can click the Help button at the right end of the dialog box title bar to display the Help window with topics related to the functions of that dialog box already identified.
- You can enter a search term or question in the Type A Question For Help box at the right end of the program 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 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.

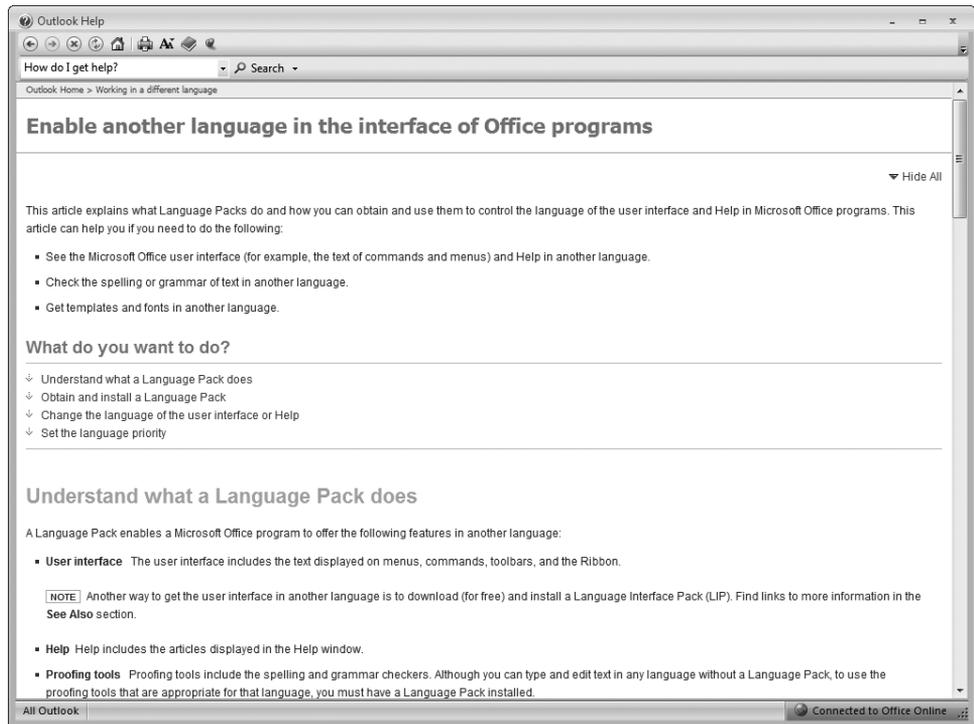
The Outlook Help window opens, displaying information about that topic.



Maximize

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.



Close

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**.

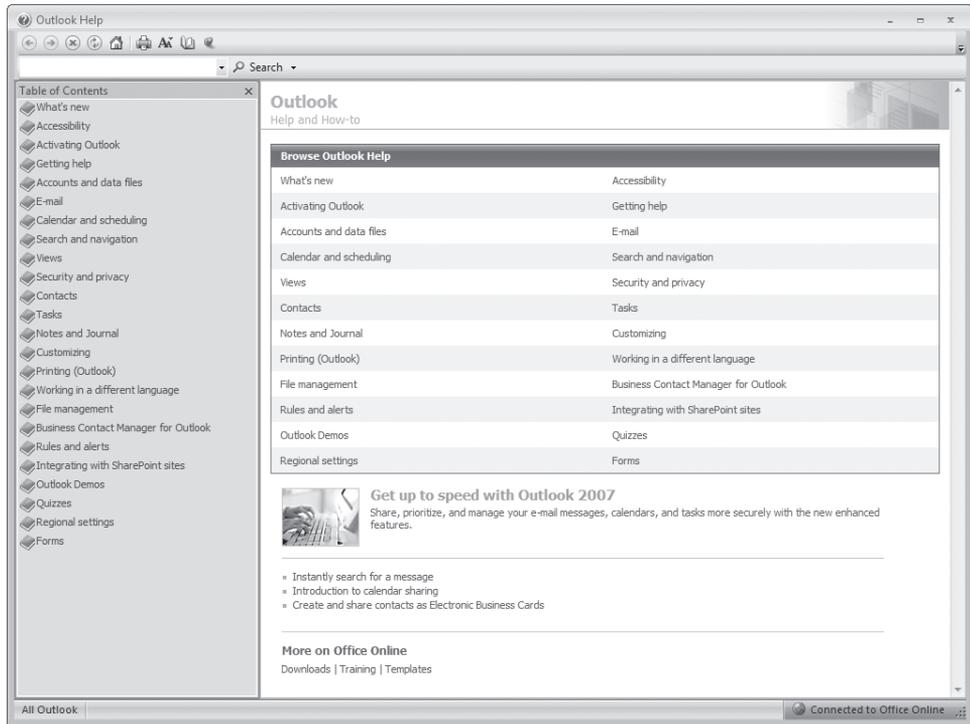
Outlook Help opens, displaying a basic topic list from which you can browse to information.



Show Table of Contents

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

- 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

- 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

1. On the **Tools** menu, click **Options**. On the **Mail Format** tab of the **Options** dialog box, click **Signatures**.
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 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 .

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 .
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 .

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 **[Del]**.
 - To remove all the holidays of the displayed country, click the **Location** group header, and then press **[Tab]**. 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

1. On the **Tools** menu, click **Options**. On the **Delegates** tab of the **Options** dialog box, click **Add**.
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 .

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 , 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

1. On the **Tools** menu, click **Options**. On the **Preferences** tab of the **Options** dialog box, click **Journal Options**.
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  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**.
11. On the **Completing** page, click **Finish**.
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

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

1. On the status bar, click **Out of Office**. Then on the **Out of Office** menu, click **Out of Office Assistant**.

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

1. On the **Tools** menu, click **Rules and Alerts**. Then in the **Rules and Alerts** window, on the **E-mail Rules** tab, click **New Rule**.
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.

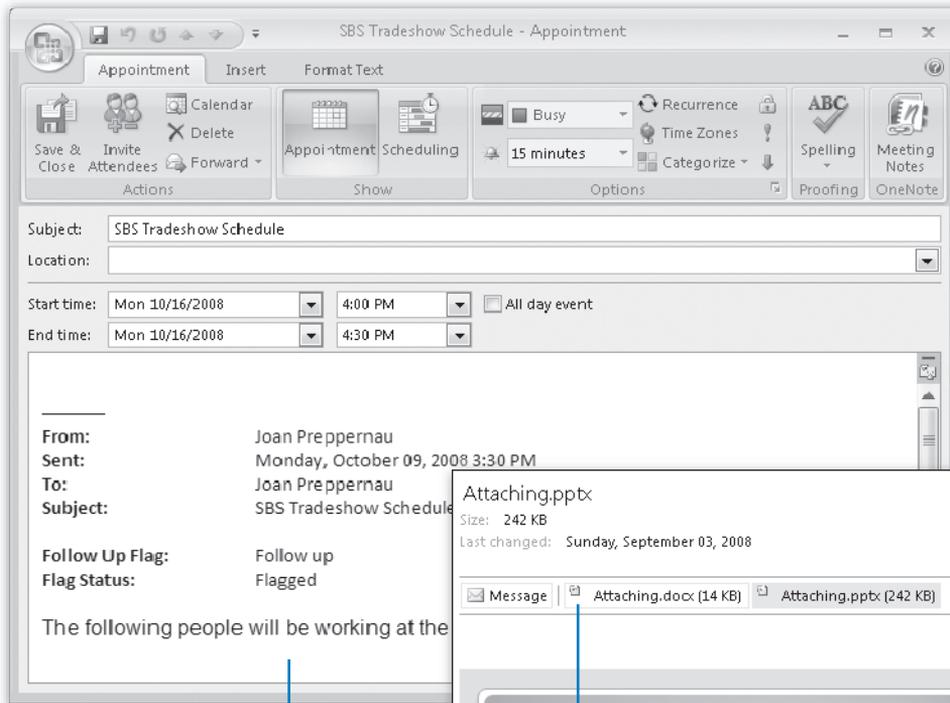
To specify what happens when a message arrives

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

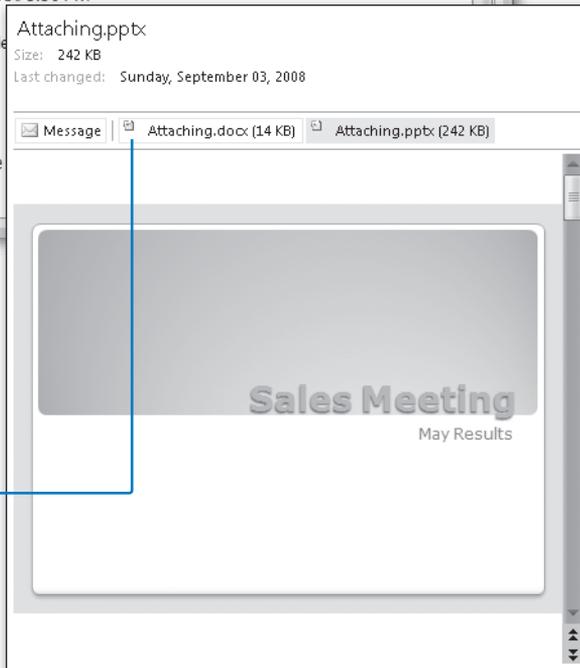
1. On the **Tools** menu, click **Options**. On the **Preferences** tab of the **Options** dialog box, click **E-mail Options**. Then in the **E-mail Options** dialog box, click **Advanced E-mail Options**.
2. In the **Advanced E-mail Options** dialog box, in the **When sending a message** area, set 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

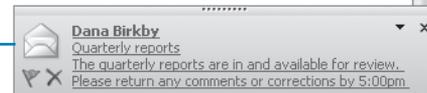


Create a task
or an appointment
from a message,
page 130

View messages and message
attachments, **page 114**



Work with new mail
notifications, **page 126**



Connected to Microsoft Exchange

4 Handling E-Mail Messages

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.

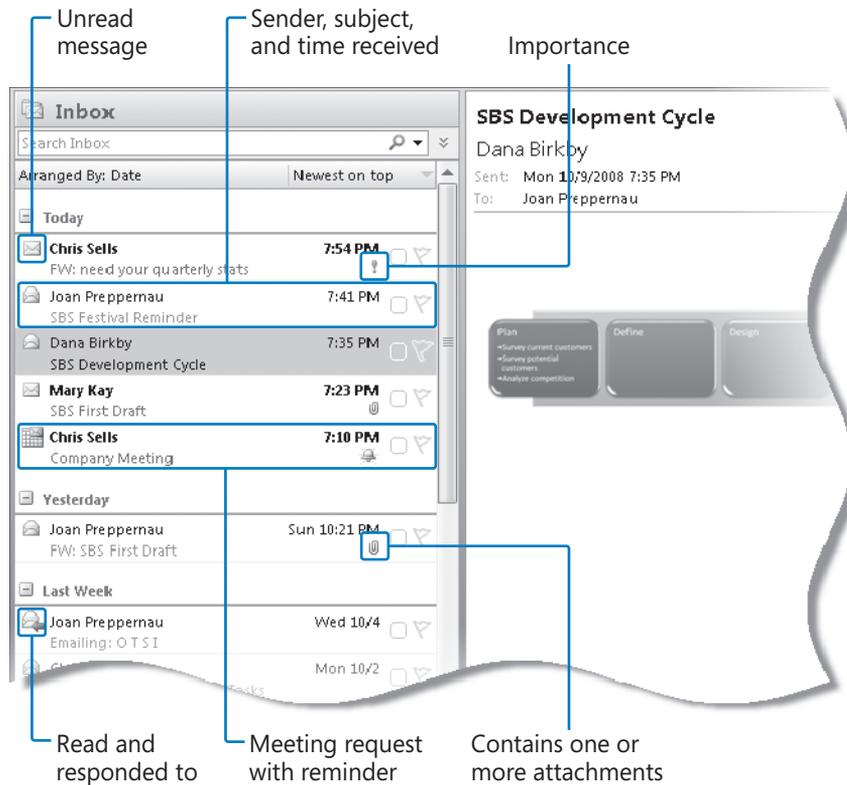
Important The exercises in this chapter require only practice files created in earlier chapters; none are supplied on the companion CD. For more information about practice files, see “Using the Companion CD” at the beginning of this book.

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.



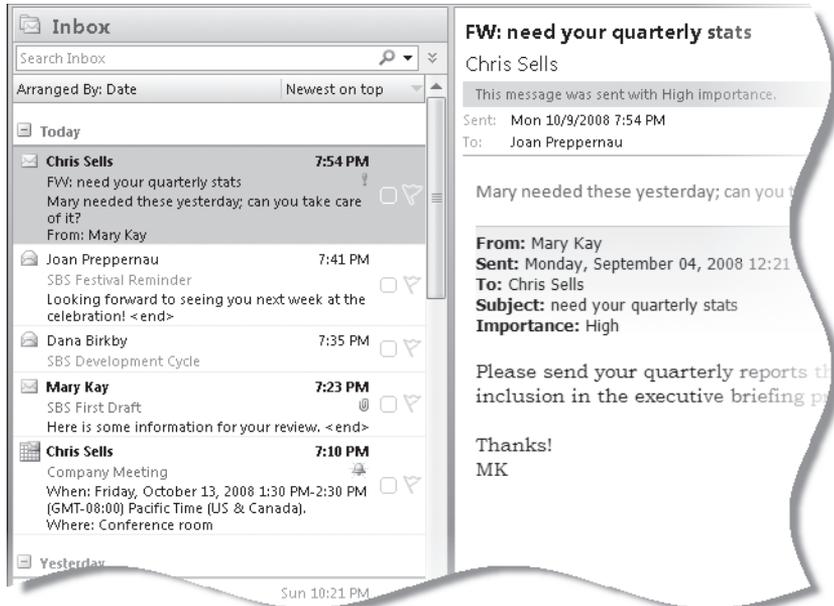
USE the *SBS First Draft* message you created in "Attaching Files to Messages" in Chapter 3, "Sending E-Mail Messages." If you did not complete that exercise, you can do so now, or you can use any message with an attachment in your Inbox.

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.

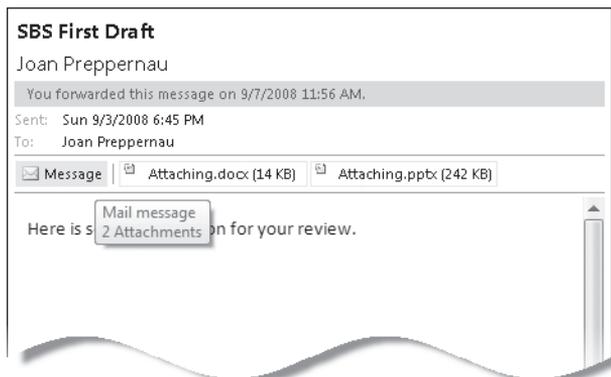
The first three lines of each message appear in the Inbox below the message header.



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.

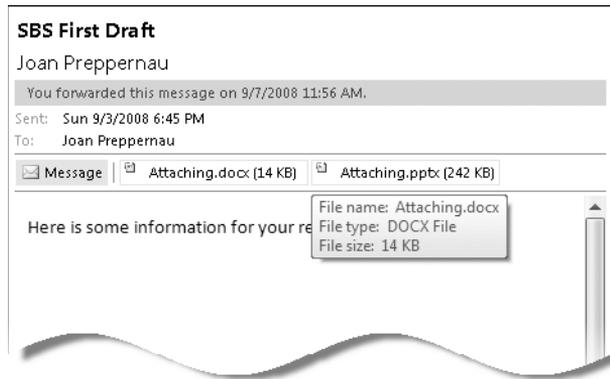
Troubleshooting If you are working through this exercise with a message that does not have an attachment, you will not see a Message button.

A ScreenTip displays the number of attachments.



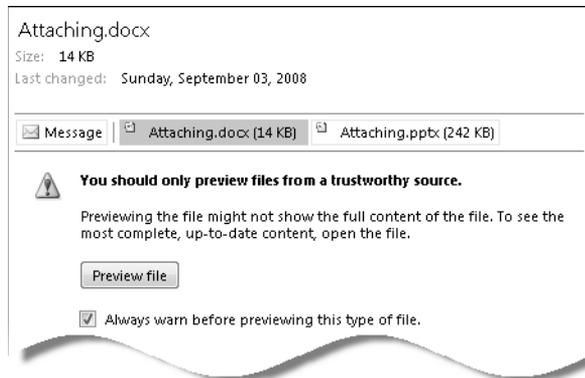
4. Point to the *Attaching.docx* attachment.

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.



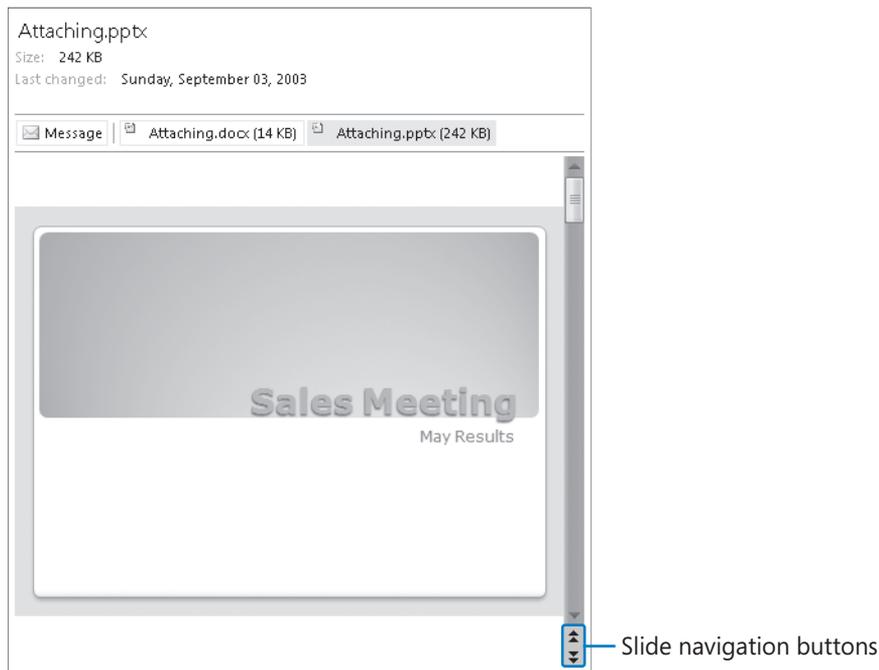
6. In the Reading Pane, click **Preview file**.

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.



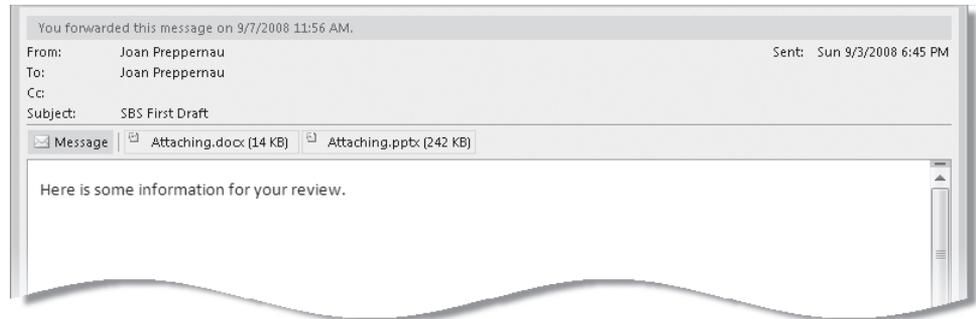
8. In the **Reading Pane**, click the **Message** button.
9. In the **Reading Pane**, double-click the *Attaching.pptx* attachment, and then in the **Opening Mail Attachment** message box, click **Open**.

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.

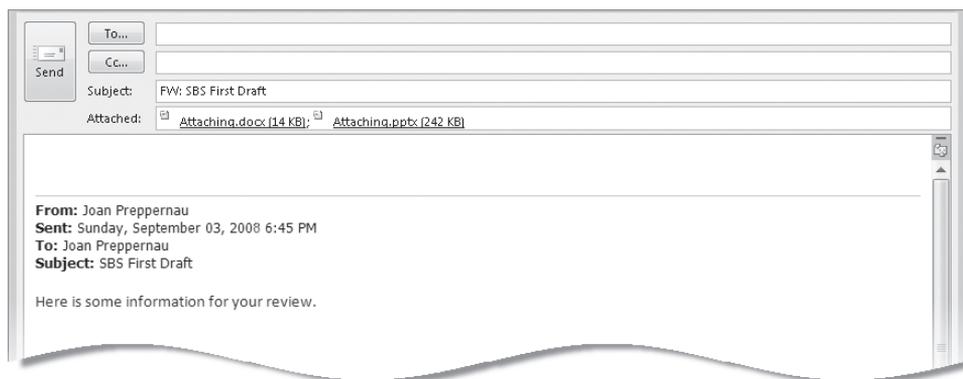
Outlook sends your reply. (If you are connected to your e-mail server, the reply will appear shortly in your Inbox.) The original message remains open on your screen.



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.



You address and send a forwarded message as you would any other.

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**.

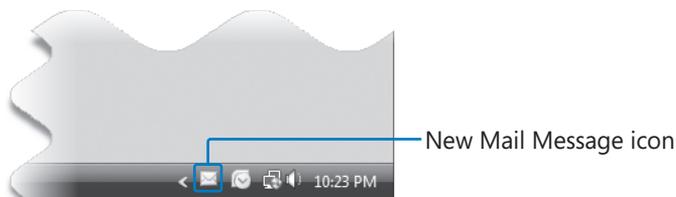
To automatically empty the Deleted Items folder each time you exit Outlook:

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**.

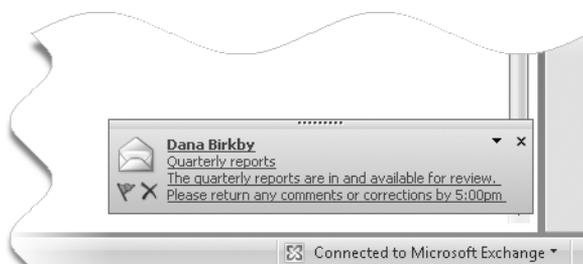
Working with New Mail Notifications

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.

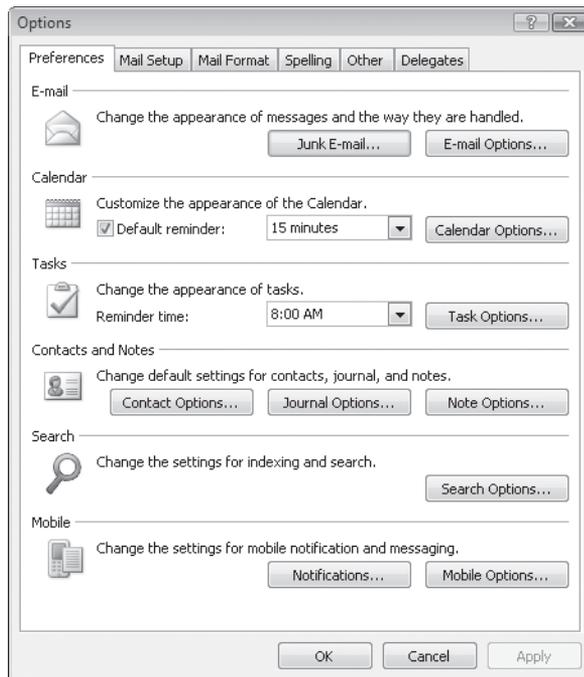
You can customize and turn off these notifications.

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.

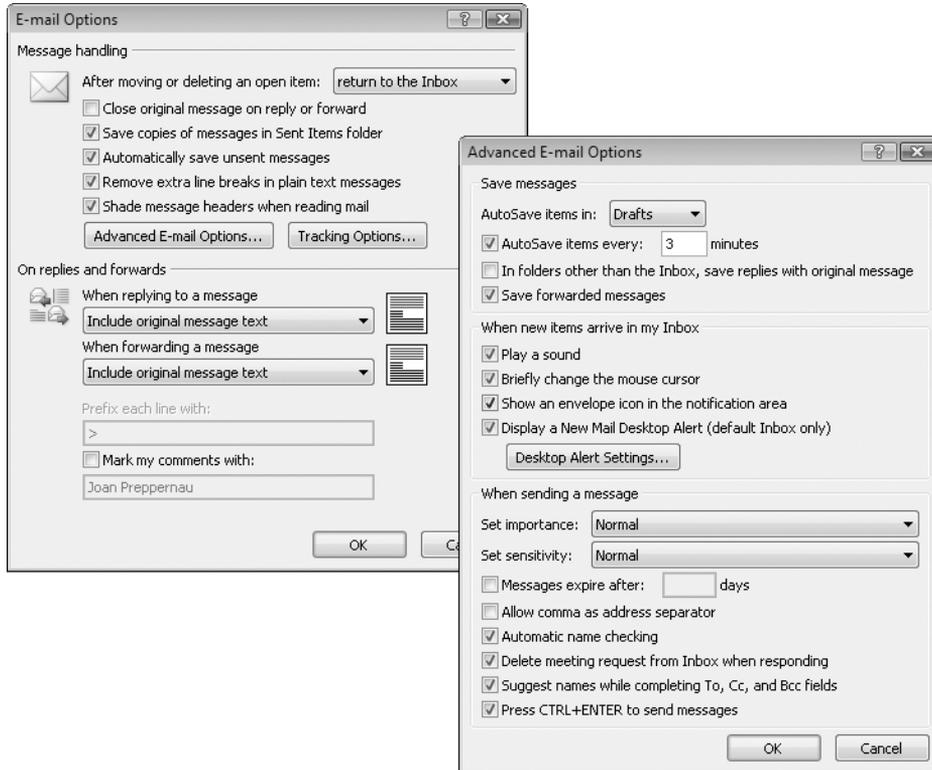
1. On the **Tools** menu, click **Options**.

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**.



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.



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**.

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.

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



New Mail
Message

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.

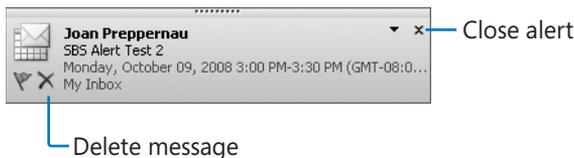
17. In the **To** box, type your e-mail address; in the **Subject** box, type **SBS Alert Test 2**; and in the **Location** box, type **my Inbox**. Then send the meeting request.

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.



Inactive Message
flag

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.

The screenshot shows the Outlook interface with three main panes:

- Inbox:** A list of messages. The message "SBS Tradeshow Schedule" by Joan Preppernau is selected. A red flag is visible in the right margin of the message header.
- Message Body:** Displays the content of the "SBS Tradeshow Schedule" message. It includes a follow-up note from Joan Preppernau, a list of attendees (Anna, Barry, Carl, Denis, Emma), and a table of giveaways.
- To-Do Bar:** Shows a calendar for October 2008 and a list of tasks. A task named "SBS Tradeshow Schedule" is listed under the "Today" header, with a due time of 4:00 PM to 4:30 PM on Monday, October 16, 2008.

SBS Tradeshow Schedule
Joan Preppernau
Follow up. Start by Monday, October 09, 2008. Due by Monday, October 09, 2008.
Sent: Mon 10/9/2008 8:07 PM
To: Joan Preppernau

The following people will be working at the tradeshow:

- Anna
- Barry
- Carl
- Denis
- Emma

Giveaways are:

| 9:00-11:00 | 12:00-2:00 | 3:00-5:00 |
|------------|------------|-----------|
| Mouse pads | T-shirts | Pens |

To-Do Bar

October 2008

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
| 24 | 25 | 26 | 27 | 28 | 29 | 30 |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 | 1 | 2 | 3 | 4 |

Company Meeting
Fri 1:30 PM - 2:30 PM
Conference room; Chris Sells

SBS Tradeshow Schedule
Mon 10/16 4:00 PM - 4:30 PM

Arranged By: Due Date

Type a new task

Today

- buy plane ticket ...
- SBS Tradeshow ...
- SBS Tradeshow ...

Tomorrow

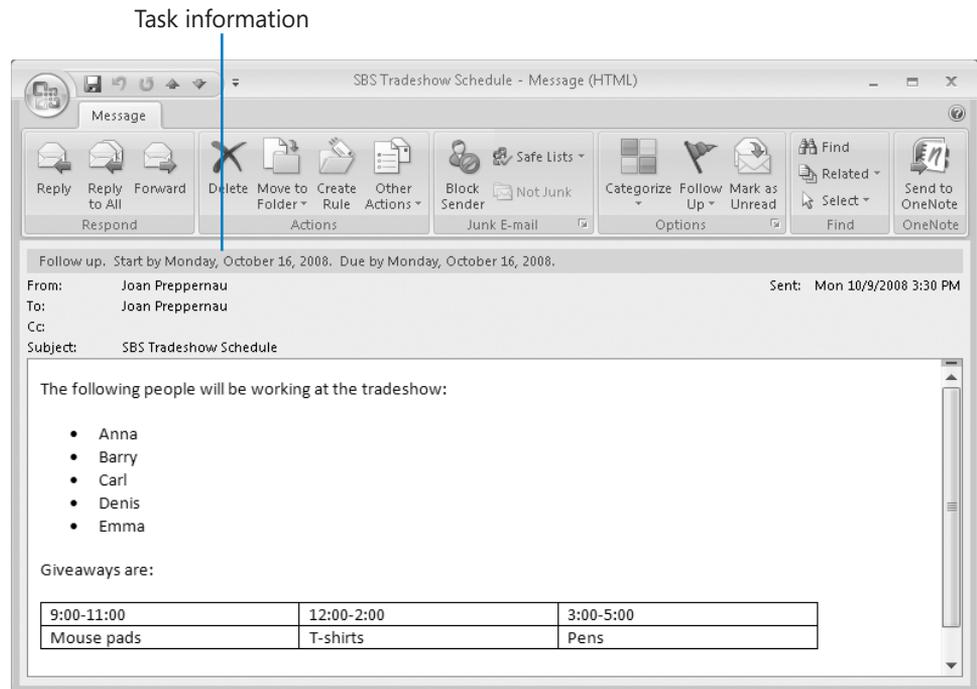
- check on invitati...

- 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.

- 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.



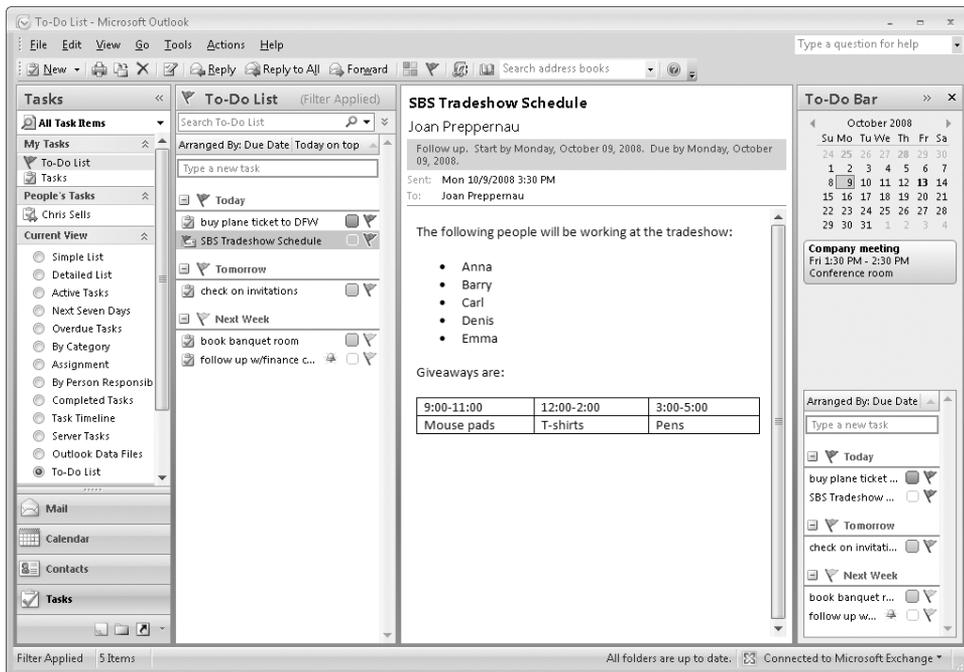
- Close the message window.
- In the **Navigation Pane**, click the **Tasks** button to display the Tasks module.

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.



Tasks

6. In the **To-Do List**, click the *SBS Tradeshow Schedule* task to display its details in the Reading Pane.



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.

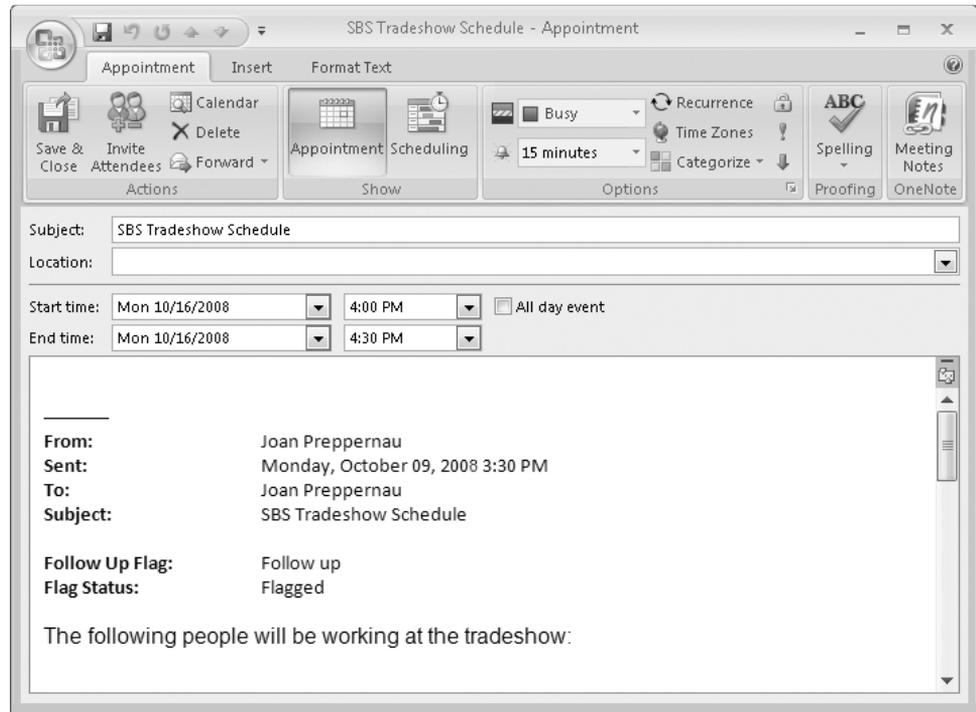


Calendar

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 Tradeshaw 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.

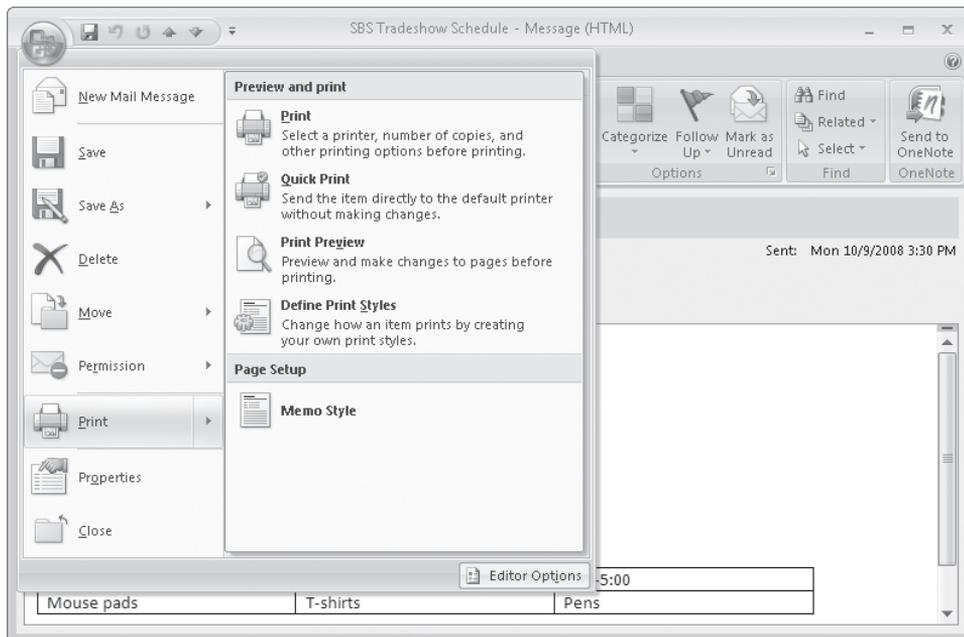
OPEN the *SBS Tradeshaw Schedule* message.

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



Microsoft Office Button

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).

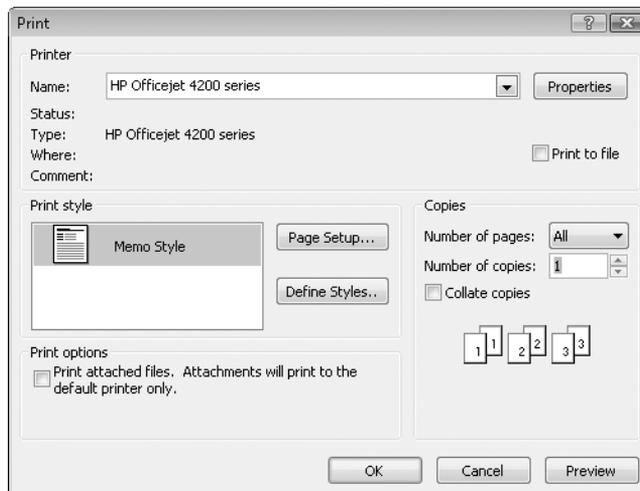


The right pane displays these preview, print, and page setup options:

- 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.

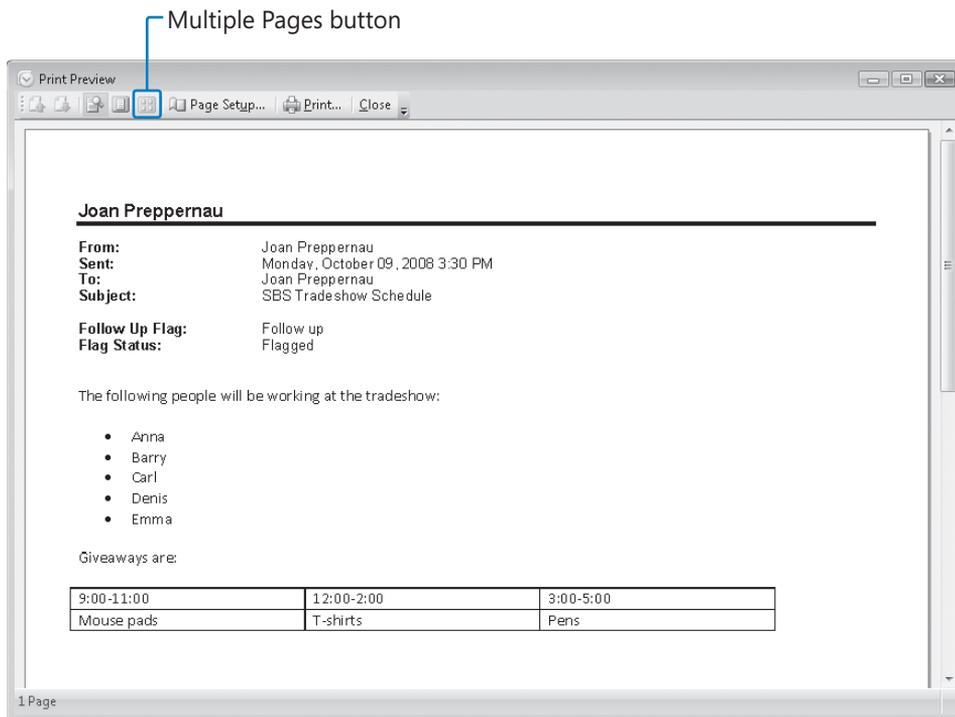
Tip You can also display the Print Preview window by pointing to Print on the Office menu and then clicking Print Preview.



Actual Size

4. On the Print Preview window toolbar, click the **Actual Size** button to display the message at 100% magnification.

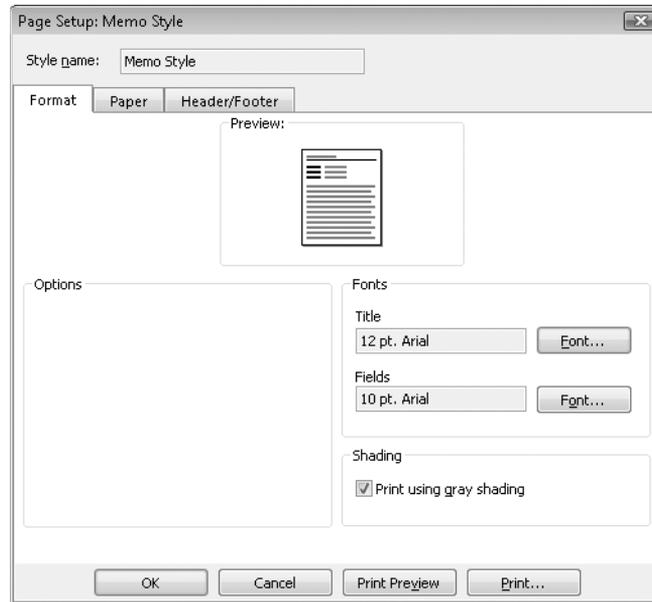
Tip When previewing a message that will be longer than one page when printed with the current settings, you can click the Multiple Pages button to preview all pages of the message at the same time. This can be useful when, for example, you want to check page breaks or scan a document for a particular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



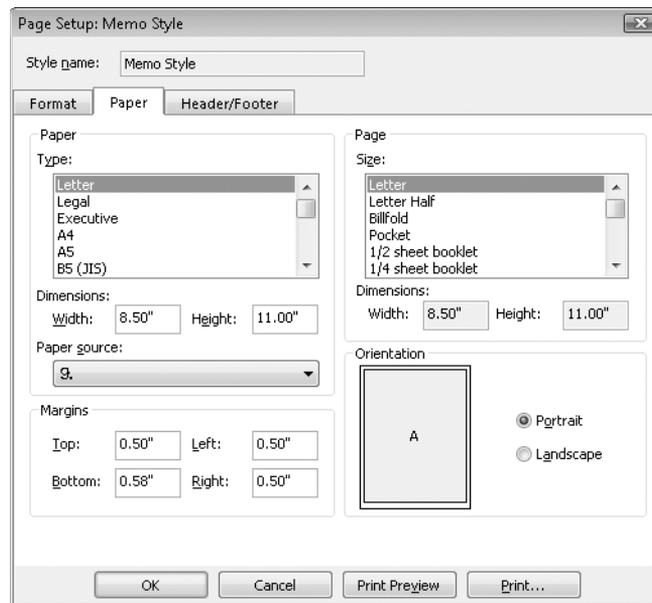
5. In the **Print Preview** window, click the **Page Setup** button.

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.

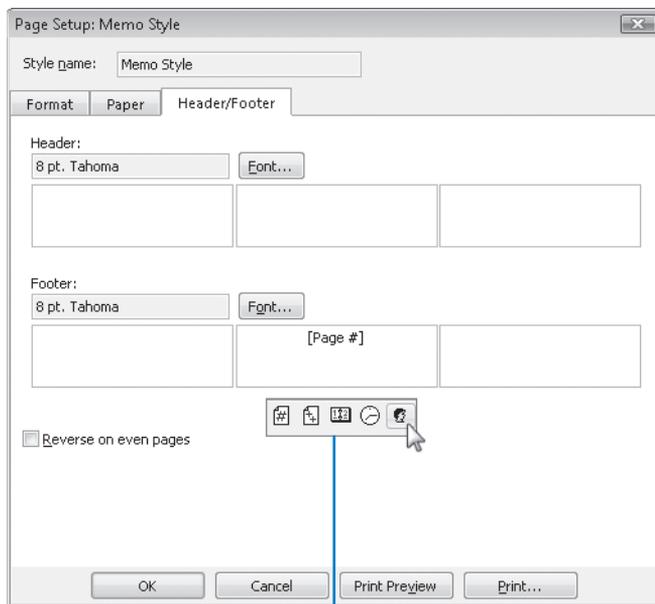


6. In the **Page Setup: Memo Style** dialog box, click the **Paper** tab to see the available options.



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.



AutoText box

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.



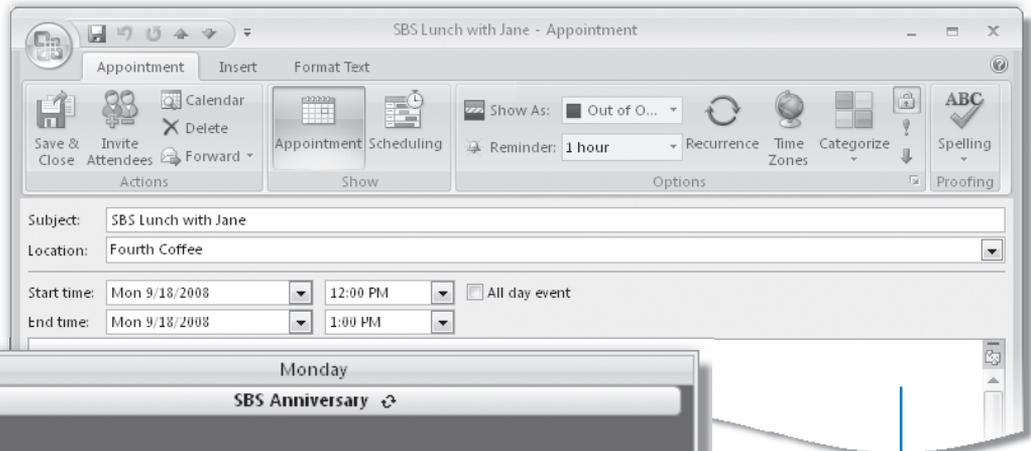
BE SURE TO remove the custom header and footer from the Memo print style if you don't want to retain them.

CLOSE the SBS Tradeshaw 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.

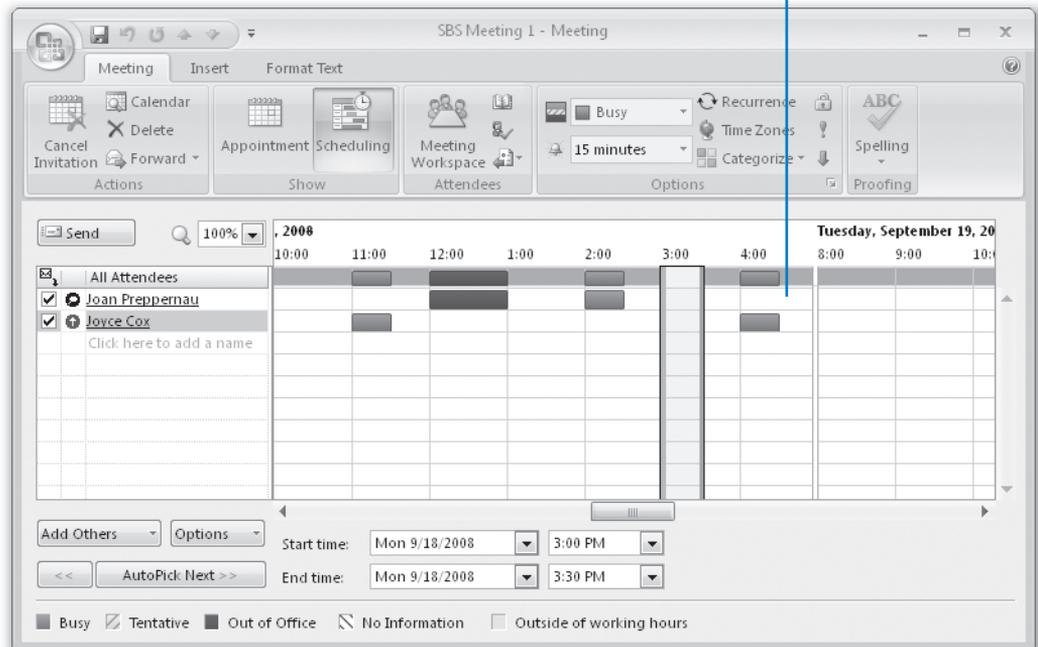
Chapter at a Glance



Schedule, update, and cancel meetings, [page 188](#)

Work in the calendar item windows, [page 176](#)

Schedule and change appointments and events, [pages 182 and 186](#)



6 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.”

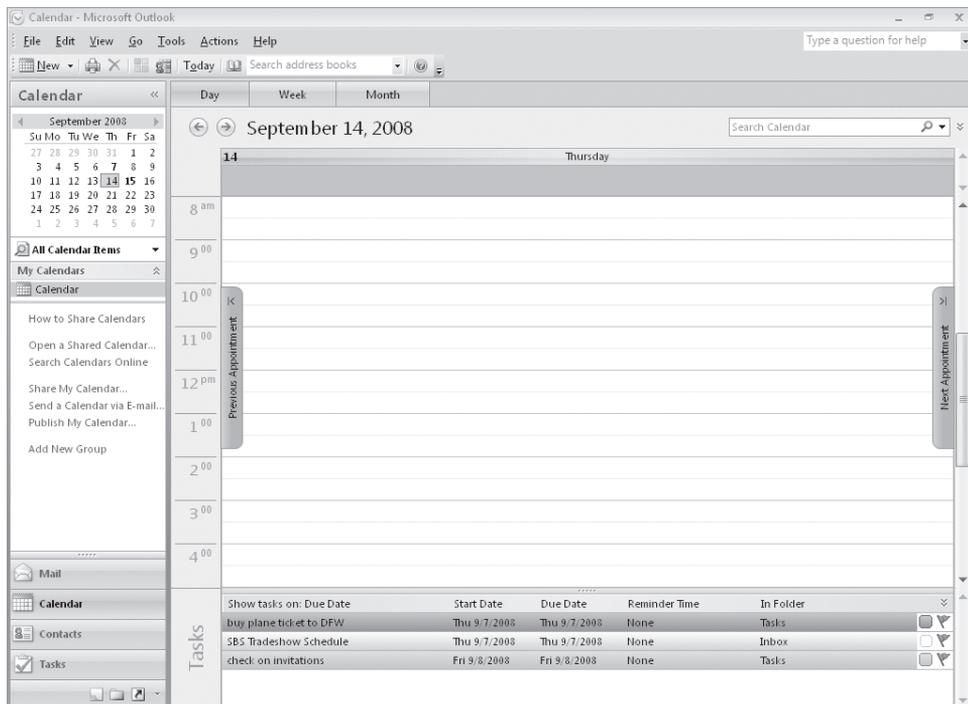
In this exercise, you will take a tour of the calendar item window elements that differ from the contact and message window elements discussed in earlier chapters, and you’ll learn about the differences between the types of calendar items. There are no practice files for this exercise.

BE SURE TO start Outlook before beginning this exercise.



Calendar

1. In the Navigation Pane, click the **Calendar** button to display the Calendar module.

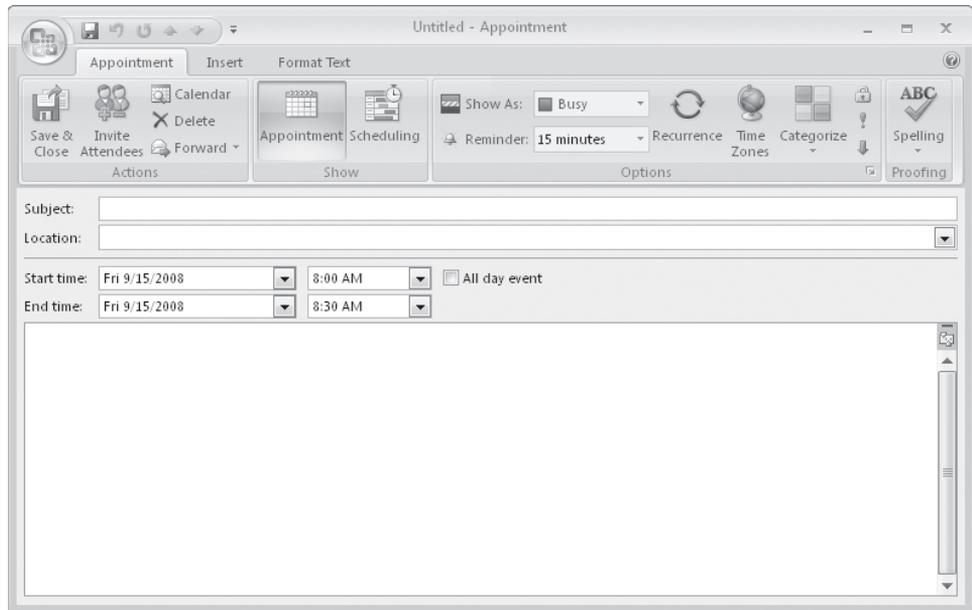


Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the “Information for Readers Running Windows XP” section at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



2. On the Standard toolbar, click the **New Appointment** button.

An untitled appointment window opens.



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.

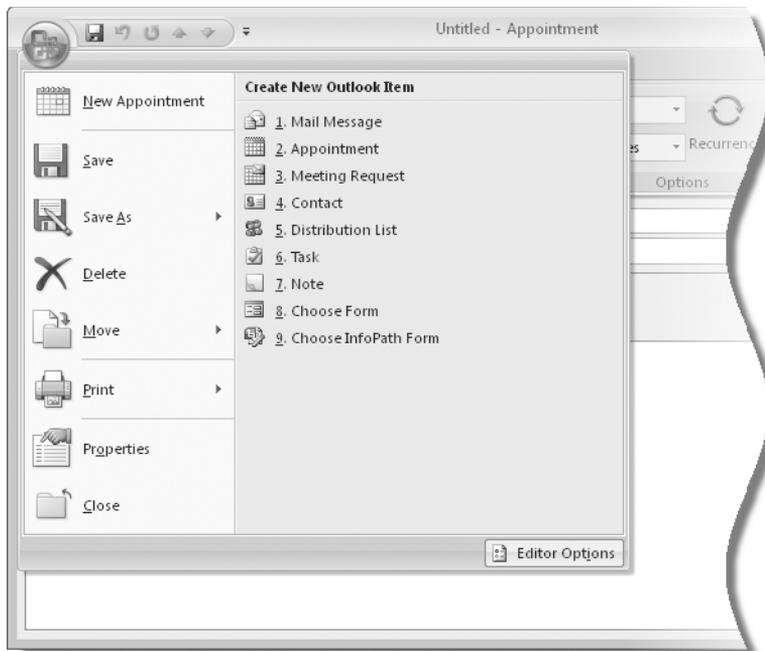
See Also For more information about the tabs and groups on the Ribbon, see “Working in the Contact Window” in Chapter 2, “Managing Contact Information.”

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.



Microsoft Office Button



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.

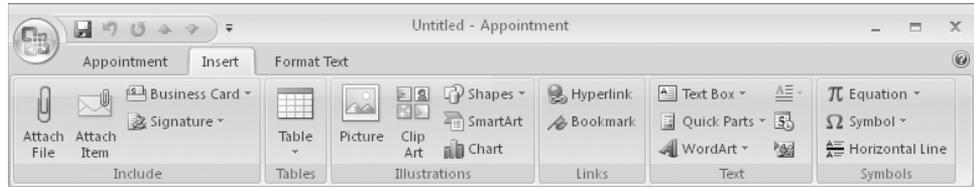
The appointment window commands are organized in groups on three tabs:

- 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.

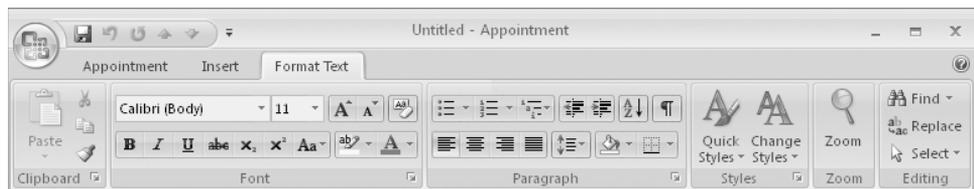
The Appointment tab is active by default. Buttons representing commands related to creating appointments are organized on this tab in four groups: Actions, Show, Options, and Proofing. You can create a simple appointment by using only the commands available on this tab.

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.



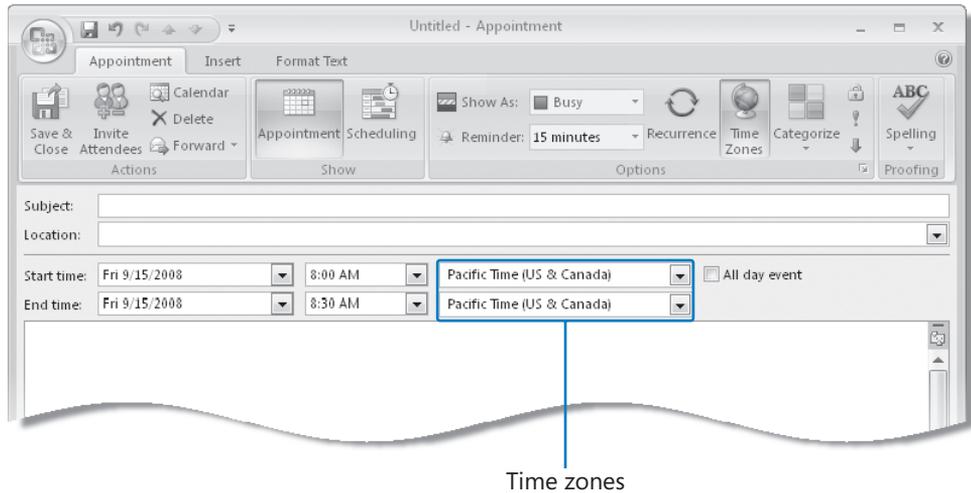
Buttons representing commands related to the appearance of message content are organized on this tab in six groups: Clipboard, Font, Paragraph, Styles, Zoom, and Editing.



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.

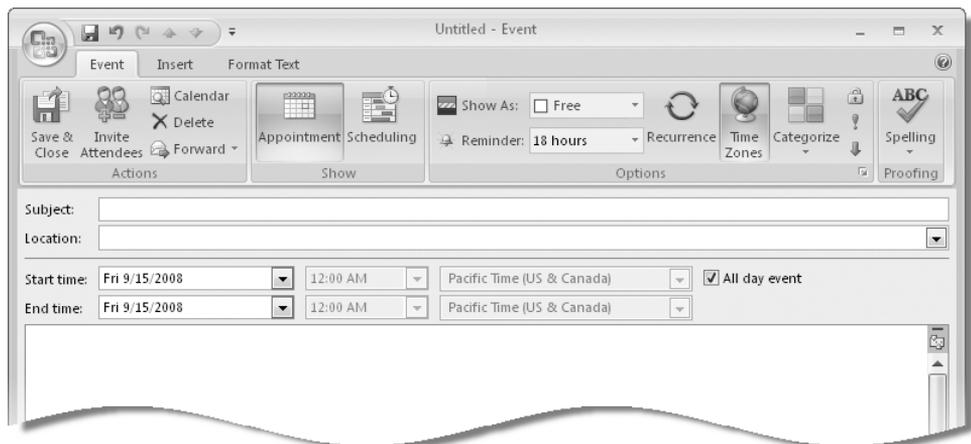
See Also For more information about configuring Outlook for different time zones, see “Configuring Outlook for Multiple Time Zones” in Chapter 7, “Managing Your Calendar.”



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.

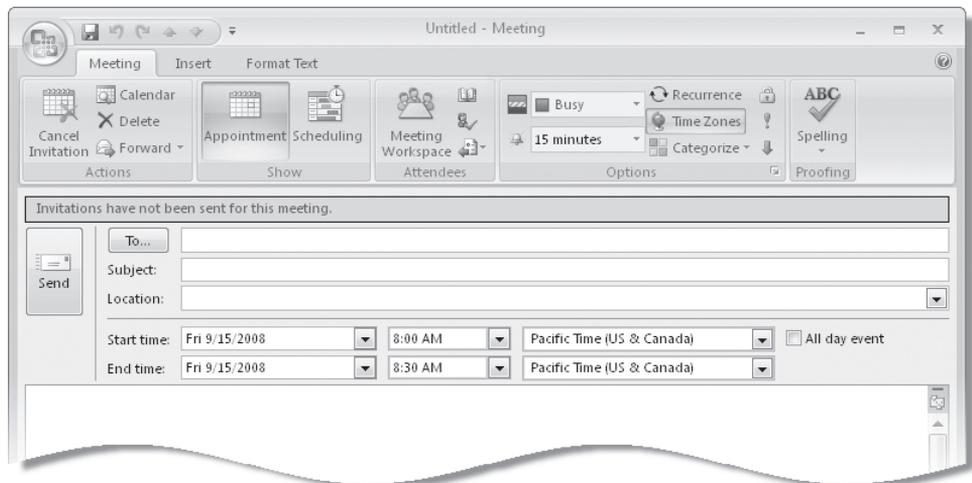


The Event tab contents are nearly identical to the Appointment tab contents—the only change is that on the Event tab, in the Options group, by default your time is shown as Free rather than Busy, and the reminder is set to display 18 hours prior to the event rather than 15 minutes.

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:



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 .

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**.

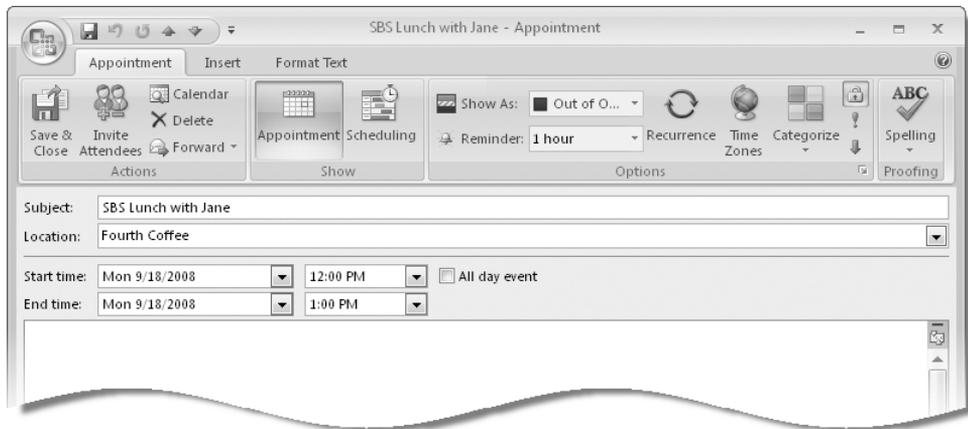
10. In the **Options** group, click the **Reminder** arrow, and then in the list, click **1 hour**.

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.



Private



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.

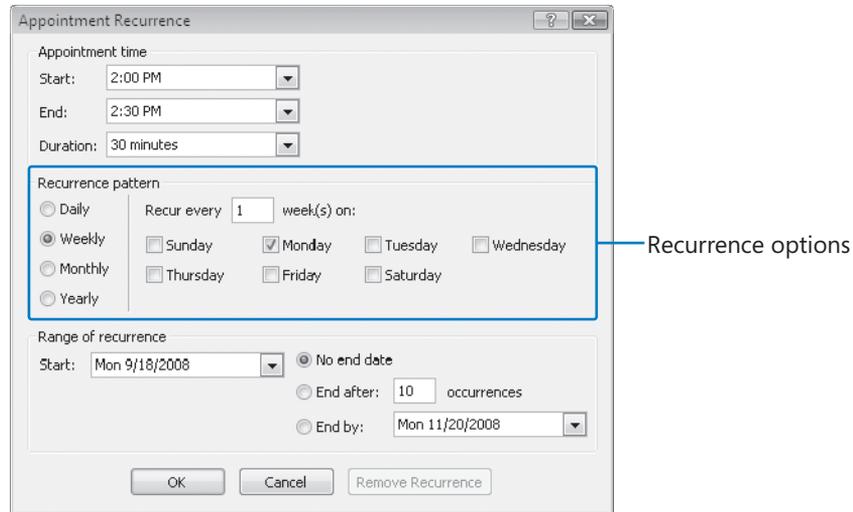
14. In the **Subject** box, type **SBS Staff Meeting**. Then in the **Location** box, type **Conference Room**.



Recurrence

15. On the **Appointment** tab, in the **Options** group, click the **Recurrence** button.

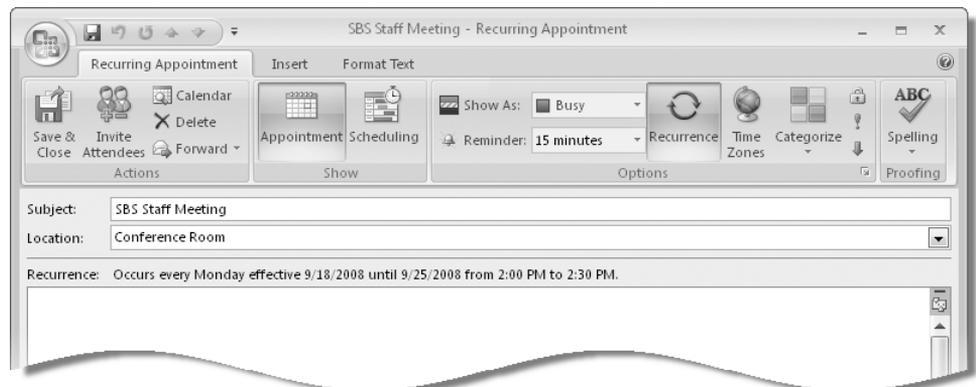
The Appointment Recurrence dialog box opens.



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.

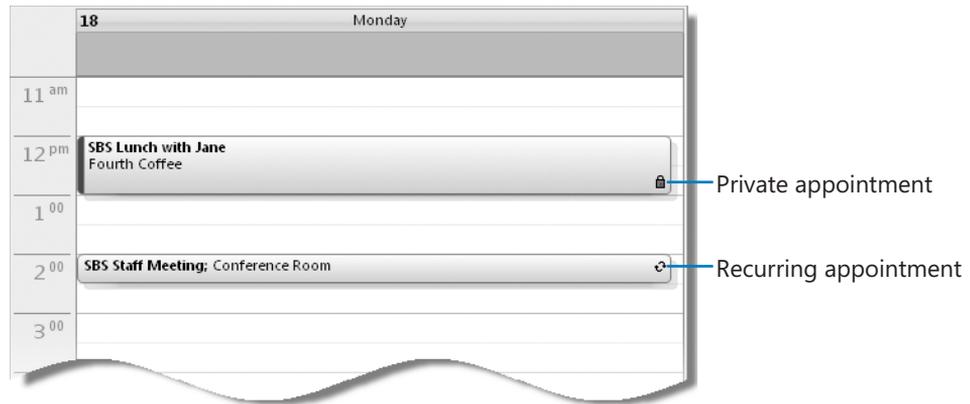
16. In the **Range of recurrence** area, click **End after**, and then in the box, replace *10* with *2*.
17. To create a 30-minute appointment beginning at 2:00 P.M. on the selected day of the week, this week and next week only, click **OK**.

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.



- 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.

BE SURE TO display the Calendar in Day view before beginning 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 .

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.

The image shows the 'Appointment Recurrence' dialog box. It is divided into three main sections: 'Appointment time', 'Recurrence pattern', and 'Range of recurrence'.
 - **Appointment time:** Start: 12:00 AM, End: 12:00 AM, Duration: 1 day.
 - **Recurrence pattern:** Radio buttons for Daily, Weekly, Monthly, and Yearly. The 'Yearly' option is selected. Under 'Yearly', there are two sub-options: 'Every' (selected) with a dropdown for 'September' and a text box for '18'; and 'The' with a dropdown for 'third', a dropdown for 'Monday', and a dropdown for 'of September'.
 - **Range of recurrence:** Start: Mon 9/18/2008. Radio buttons for 'No end date' (selected), 'End after: 10 occurrences', and 'End by: Fri 9/18/2015'.
 At the bottom are buttons for 'OK', 'Cancel', and 'Remove Recurrence'.

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.

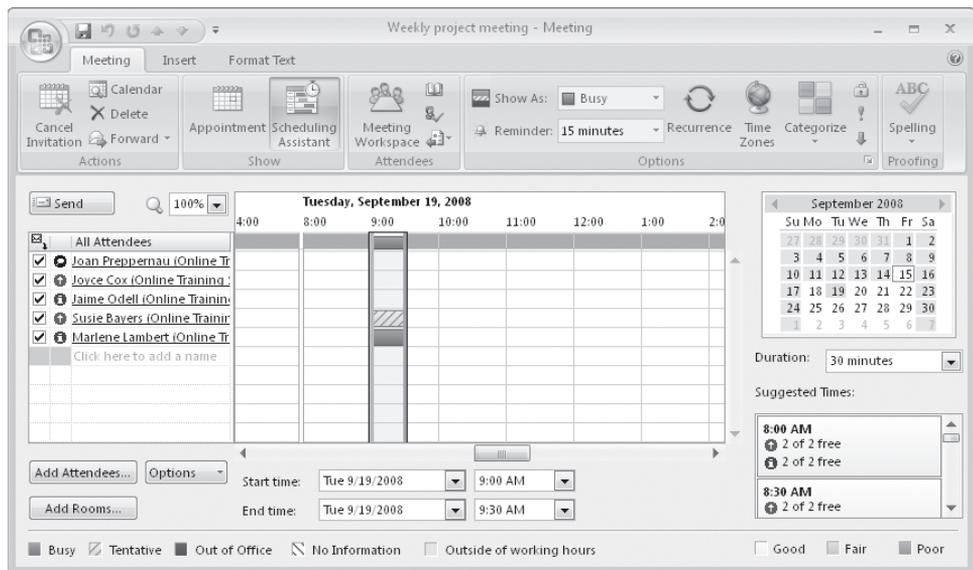
You can send a meeting invitation (referred to as a *meeting request*) to any person who has an e-mail account (even to people who don't use Outlook). You can inform non-critical attendees of the meeting by marking their attendance as Optional. You can invite entire groups of people by using an e-mail 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.

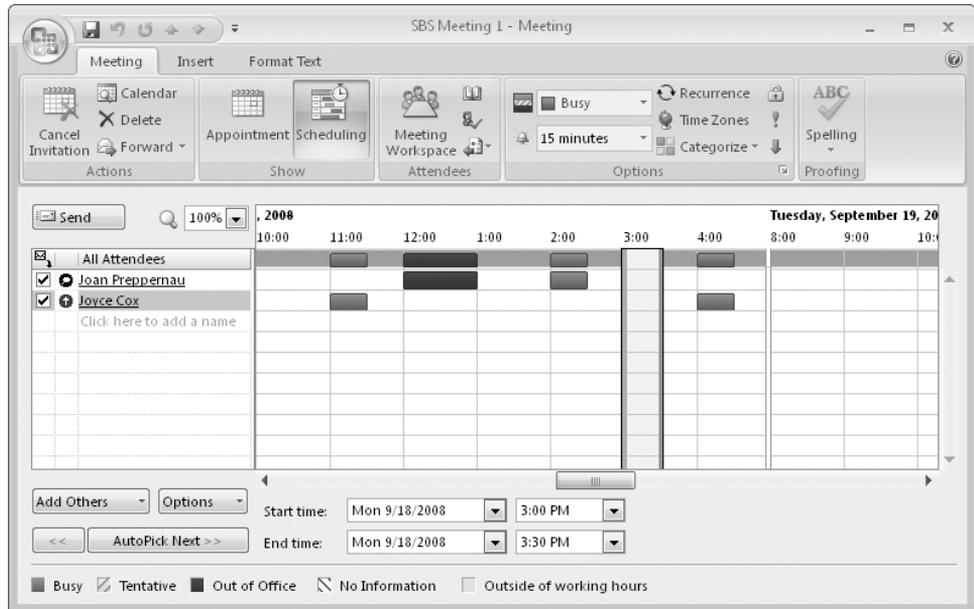
Troubleshooting If the active selection in the Calendar pane is an event, Outlook will create an Invited Event request instead; if this happens, clear the All Day Event check box to convert the Invited Event to a Meeting.

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.



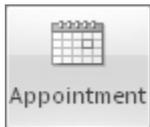
Tip You can enter additional attendees in the To box on the Appointment page or in the All Attendees list on the Scheduling page. If you prefer, you can organize a meeting directly from a Scheduling page-like interface by clicking Plan A Meeting on the Actions menu.

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

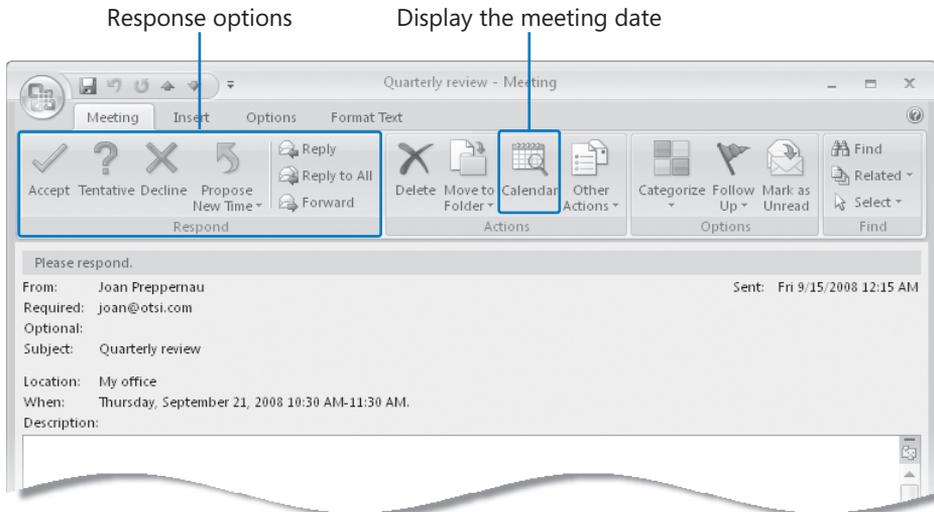
If your organization has a collaboration site built with Microsoft SharePoint products and technologies, such as a team site, on which you have permission to create document libraries, you can create a *meeting workspace* (a shared site for planning a meeting and tracking related tasks and results) at 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.

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