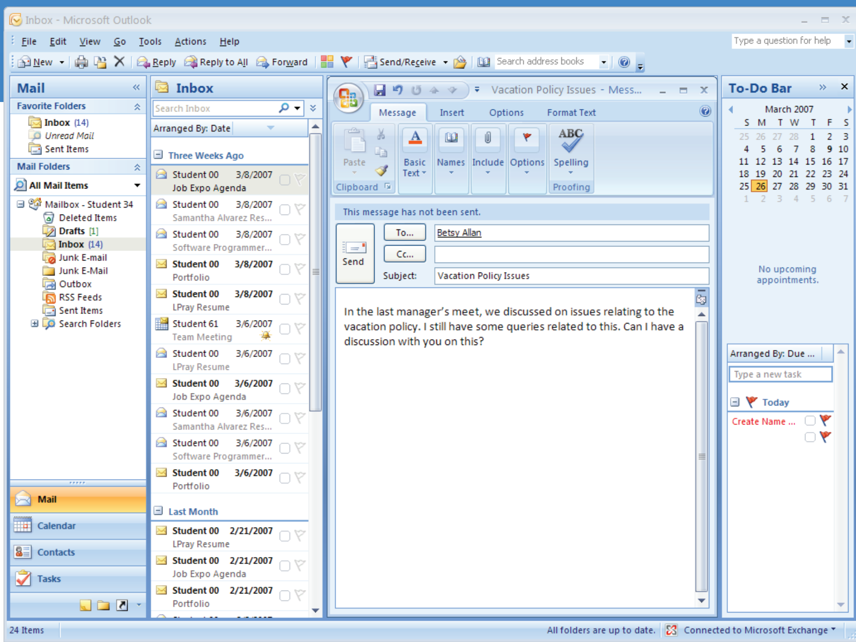
element k
your learning solutions partner

MICROSOFT® OUTLOOK® 2007



KCARDS
knowledge at your fingertips

QUICK REFERENCE SHEET

Table of Contents

Creating, Formatting, and Sending a Message

Compose and Send a Simple Message

1. On the Standard toolbar, click New to create a new message.
2. In the Message window, click To. This displays the Select Names: Global Address List dialog box.

   Note: You can also address a message by typing the name of the user in the To text box.

3. Select the name of the desired recipient.
4. In the Message Recipients section, click To to add the selected user name in the To text box and click OK.
5. If desired, specify additional recipient names in the Cc and Bcc text boxes.
6. Click the Subject field and type a subject.
7. Press Tab and then type your message.
8. When finished, click Send.

Attach a File to a Message

1. In a New Message window, type the name of the recipients, subject, and message text.
2. In the Message window, select the Message tab or the Insert tab.
3. In the Include group, click Attach File.
4. In the Insert File dialog box, navigate to the desired folder and double-click the file you want to attach.

Format a Message

1. Open a message and select the desired text.
2. In the Message window, select the Format Text tab.
3. In the Font group, click the Font Size drop-down arrow and select the desired value.
4. In the Font group, apply bold, italic, underline, and strikethrough formatting as desired.
5. Select the appropriate style, color, and font from the Styles group.

Check the Spelling and Grammar

1. On the Message tab of the Message window, from the Spelling drop-down list, select Spelling And Grammar.
2. Correct any words that Outlook does not recognize. Use the Ignore Once, Ignore All, Add to Dictionary, Change, and Change All options as appropriate.
3. Click OK to close the message box.

Insert a Hyperlink to a Web Page in a Message

1. Within the message, click to choose the desired location.
2. Create the hyperlink.
   - Type the hyperlink.
   - Create a hyperlink from an Internet Explorer window.
   - Create a hyperlink using the Insert Hyperlink dialog box.

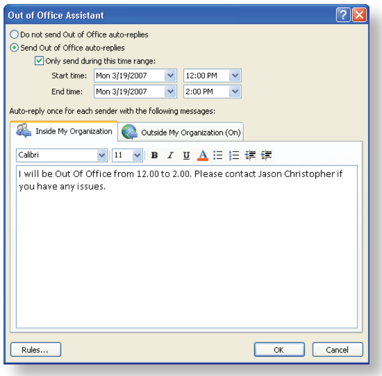
Modify Message Settings

1. In a New Message window, on the Message tab, in the Options group, click the Dialog Box Launcher button to open the Message Options dialog box.
2. In the Message Settings section, from the Importance drop-down list, select the desired option: Low, Normal, or High.
3. From the Sensitivity drop-down list, select the desired option: Normal, Personal, Private, or Confidential. Click Close.

Post Information in a Public Folder

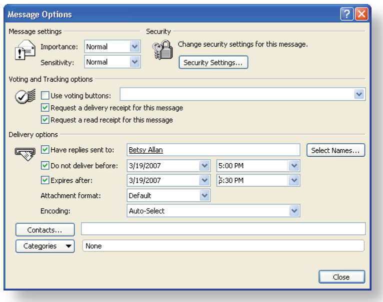
1. Open the public folder in which you need to post information.
2. On the Standard toolbar, click New to create a new post.
3. In the Untitled-Discussion window, type the subject and message, and then click Post.

Notify Others That You Will be Out of the Office



1. Choose Tools > Out Of Office Assistant.
2. Select the Send Out Of Office Auto-Replies option.
3. On the Inside My Organization tab, in the message box, type the message you want people to receive, and then click Rules.
4. Click Add Rule to apply additional rules.
5. Specify the desired conditions to be met.
6. In the Perform These Actions section, specify what Outlook should do with messages that meet the conditions.
7. Click OK, and then click OK to close the Out Of Office Rules dialog box.
8. In the Out Of Office Assistant dialog box, check the Only Send During This Time Range check box.
9. From the End Time drop-down list, select the desired end date and time.
10. On the Outside My Organization (On) tab, uncheck the Auto-Reply To People Outside My Organization check box. Click OK.

Modify Delivery Options



1. In a New Message window, on the Message tab, in the Options group, click the Dialog Box Launcher button to open the Message Options dialog box.
2. In the Delivery Options section, check the Have Replies Sent To check box.
3. Click Select Names.
4. In the Name list, double-click the desired names and click OK.
5. As desired, check the check boxes for Request A Read Receipt For This Message and Request A Delivery Receipt For This Message.
6. If desired, check the Do Not Deliver Before or Expires After check boxes, and then select the desired dates and times from the drop-down lists.
7. Click Close to apply the delivery options.
8. Specify where the sent messages are to be saved. You can select the Sent Items folder, an alternate folder, or choose not to save copies of sent messages.

Working with Messages

Open, Print, and Forward a Message:

1. Open a message.
   a. In the Inbox, double-click a message to open it.
2. Print a message.
   a. Click the Microsoft Office button and choose Print to open the Print dialog box.
   b. In the Print dialog box, set the number of copies to be printed.
   c. If necessary, modify the print options.
   d. Click OK to print the message.
3. Forward a message.
   a. On the Message tab, in the Respond group, click Forward.
   b. Address the message to the desired recipients.
   c. Send the message.

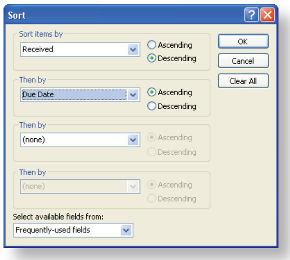
Delete a Message

1. Select the message to be deleted.
2. On the Standard toolbar, click the Delete button.
3. To verify that the message is deleted, in the All Mail Items Pane, click the plus sign (+) to expand your mailbox, and then select the Deleted Items folder.

Reply to a Message

1. Open the desired message.
2. On the Message tab, in the Respond group, click Reply to reply only to the sender of the message, or click Reply To All to reply to the sender and all the recipients of the message.
3. Type your response and then send the message.

Sort Messages Using Multiple Criteria



1. Display the folder containing the messages you want to sort.
2. Choose View > Arrange By > Custom.
3. Click Sort.
4. Select the field to sort by.
5. Select either the Ascending or Descending sort option.
6. Select the second field to sort by, and then select either the Ascending or Descending sort option.
7. If you need additional sort criteria, repeat step 6.
8. Click OK, and then click OK to perform the sort.

Organize Messages Using Color

1. Display the folder that contains messages you want to organize.
2. Choose Tools > Organize.
3. In the Ways To Organize panel, click the Using Colors link.
4. From the Color Messages drop-down list, select either From or Sent To.
5. In the Color Messages text box, type the user name of the person whose messages you want to display in color.
6. From the Color drop-down list, select a color.
7. Click Apply Color so that the specified messages are displayed in the selected color.

Flag a Message for Follow-up

1. In the Inbox, right-click the message to be flagged, and choose Follow Up.
2. Select the desired option in the Follow Up menu to add a flag.
3. View the flagged message in the Follow Up folder.
   a. On the Standard toolbar, from the New drop-down list, select Search Folder.
   b. Select Mail Flagged For Follow Up, and click OK.
   c. Verify that the For Follow Up folder is displayed in the Search Folder list of the Navigation Pane.

Mark a Message as Unread

1. In the Inbox, either select or open the message you want to mark as unread.
2. Choose Edit > Mark As Unread.

Modify the Default Message Format

1. Choose Tools > Options.
2. Select the Mail Format tab.
3. From the Compose In This Message Format drop-down list, select the desired message format: HTML, Rich Text, or Plain Text. Click OK.

Filtering and Searching for Outlook Items

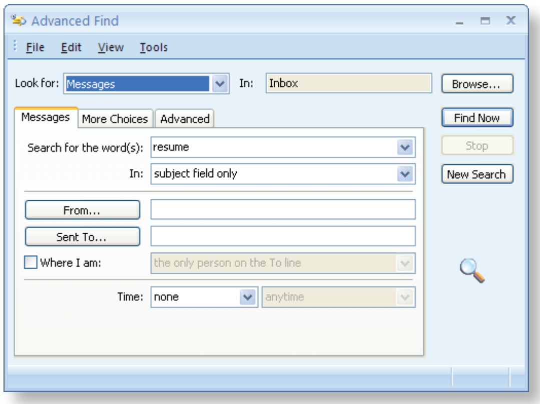
Sort Outlook Items by Color Category

1. Display a folder with the Outlook items you want to sort.
2. Choose View > Current View > By Category to sort all the Outlook items by color category.

Find Outlook Items

1. Select the folder(s) to be searched.
2. In the Instant Search text box, type the search text. The items of the selected folder that contain the search text are displayed in the Instant Search Results pane with the search text highlighted.
3. To search all folders of an Outlook item type, in the Instant Search pane, from the Show Instant Search Pane Menu drop-down list, select Search All [Outlook Folder] Items.

Search Outlook Items by Category

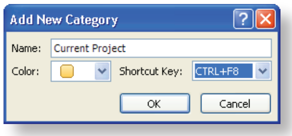


1. Choose Tools > Instant Search > Advanced Find to open the Advanced Find window.
2. From the Look For drop-down list, select the item you want to search.
3. If the appropriate folder does not appear in the In text box, click Browse to select it from the Select Folder(s) dialog box.
4. Select the More Choices tab. Click Categories.
5. In the Color Categories dialog box, click New.
6. In the Add New Category dialog box, in the Name text box, type a color category name.
7. Select a color and click OK twice.
8. Click Find Now. Items matching the criteria are displayed at the bottom of the Advanced Find window.

Filter Items

1. Display the folder contents list for the folder to which you want to apply a filter.
2. Choose View > Arrange By > Custom.
3. In the Customize View: Sent To dialog box, click Filter to open the Filter dialog box.
4. Select the Messages, More Choices, Advanced, or SQL tabs to choose or set the filter options.
5. Click OK. In the Microsoft Office Outlook warning box, click Yes to apply the filter.
6. Information about the filter you applied is displayed to the right of the Filter button. Click OK to close the Customize View: Sent To dialog box and apply the filter.

Categorize Appointments or Meetings Using Color



1. Display the Calendar folder that contains appointments or meetings you want to categorize.
2. Double-click an appointment or meeting to display the Appointment or Meeting form.
3. On the Appointment or Contact tab, in the Options group, click Categorize and select All Categories.
4. Click New. In the Name text box, type a name for the new color category.
5. From the Color drop-down list, select a color and click OK.
6. In the Color Categories dialog box, click OK to assign a color category to an appointment or meeting request.

Working with Outlook Folders

Create a Folder

1. Choose File > New > Folder.
2. Type a name for the folder.
3. Select the location where you want the folder to be located, and then click OK.

Move or Copy Messages to a Folder

1. Select the desired message.
2. To move the message to a folder, right-click the message and choose Move To Folder and, in the Move Items dialog box, select the desired folder and then click OK.
3. To copy the message to a folder, choose Edit > Copy To Folder and, in the Copy Items dialog box, select the desired folder and then click OK.

Specify Default Folder Permissions

1. Right-click the folder, choose Properties, and then select the Permissions tab.
2. From the Name list, select Default.
3. From the Permission Level drop-down list box, select a permission level.
4. Click OK to apply the permissions.

Create a Public Folder and Assign Permissions to It

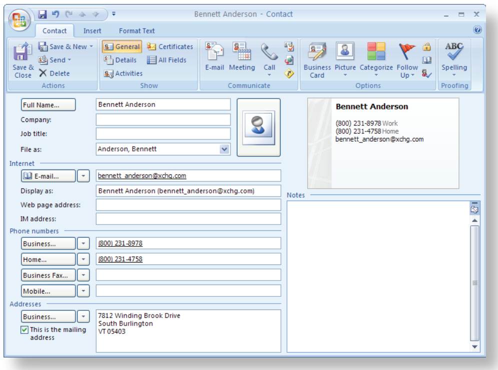
1. In the Navigation pane, click the Folder List button to display the Folder List.
2. Expand Public Folders and select All Public Folders.
3. Choose File > New Folder.
4. Type the name of the public folder.
5. From the Folder Contains drop-down list, select the type of Outlook item that your public folder will contain.
6. In the Select Where To Place The Folder list box, select All Public Folders and click OK to create the public folder.
7. In the Folder List, navigate to the required public folder.
8. Right-click the public folder and choose Properties.
9. In the public folder's Properties dialog box, select the Administration tab.
10. In the This Folder Is Available To section, select the required permission option, and then click OK.

Add Users to a Public Folder and Modify User Permissions

1. Open the public folder's Properties dialog box.
2. Select the Permissions tab, and then click Add.
3. Select the appropriate address.
4. In the list of user names, select the users you need to add to the public folder, and then click Add.
5. In the list of user names, select the user whose permissions you need to modify.
6. In the Permissions section, from the Permission Level drop-down list, select the required permission level and click OK.

Working with Contacts

Add and Edit a Contact



1. To add a contact:
   a. From the Go menu, select Contacts.
   b. On the Standard toolbar, click the New Contact button.
   c. Type the desired information in the appropriate text boxes.
   d. On the Standard toolbar, click Categorize.
   e. Select the desired color Category.
   f. In the Rename Category dialog box, click No to retain the name of the Category.
   g. On the Contact tab, in the Actions group, click Save & Close.
2. To edit a contact:
   a. Double-click the contact to open it.
   b. Edit the appropriate information.
   c. On the Contact tab, in the Show group, click the Details button, and type the desired secondary information in the Details page of the contact.
   d. Save the contact.

Send a Contact Through Email

1. Open the Contacts folder.
2. Open the contact that you want to send.
3. On the Contact tab, in the Actions group, select the desired option from the Send menu, such as Business Card, Internet Format, or Outlook Format.
4. Address the message and type the subject.
5. In the Message window, click Send.

Sort Contacts

1. In the Navigation Pane, click Contacts, and then select the desired option in the Current View section to sort the contacts.
2. Click the column header a second time to sort that column in reverse order.

Find a Contact

1. On the Standard toolbar, in the Find A Contact text box, click to activate it.
2. Type the name, company name, or other text that you are going to search for, and then press Enter.

Categorize Contact Information Using Color

1. Display the appropriate Contacts folder.
2. Double-click a contact.
3. On the Contact tab, in the Options group, click Categorize and select All Categories.
4. In the Color Categories dialog box, click New.
5. Type a name for the new color category.
6. Select a color and click OK.
7. In the Color Categories dialog box, click OK to assign a color category for the contact.
8. In the Actions group, click Save & Close to close the Contact form.

Create a Distribution List

1. Choose File > New > Distribution List to open a new Distribution List form.
2. In the Name text box, type a name for the distribution list.
3. On the Distribution List tab, click Select Members.
4. From the Address Book drop-down list, select the relevant address book.
5. In the Name list, double-click the user names that you want to include in this distribution list.
6. Click OK to display the user names in the Distribution List form.
7. On the Distribution List tab, in the Actions group, click Save & Close to create the distribution list.

Working with Appointments and Events

Schedule an Appointment

1. In the Navigation Pane, select Calendar, and, in the Date Navigator, select the date of the appointment.
2. On the Standard toolbar, click New Appointment.
3. Type a subject and a location.
4. Select the appropriate starting and ending dates and times for the appointment.
5. In the Appointment form, select the desired options.
6. If necessary, create a recurring appointment.
   a. On the Appointment tab, in the Options group, click Recurrence.
   b. Select the desired options, such as the start and end time, the recurrence pattern, and the number of recurrences.
7. Save and close the appointment.

Create an Event

1. In the Date Navigator, select the date of the appointment.
2. On the Standard toolbar, click New Appointment.
3. Type a subject and a location.
4. Check the All Day Event check box.
5. Select the appropriate starting and ending times for the appointment.
6. If necessary, create a recurring event.
   a. On the Appointment tab, in the Options group, click Recurrence.
   b. Select the desired options, such as the start and end time, the recurrence pattern, and the number of recurrences.
7. Save and close the event.

Create an Appointment from an Email Message

1. In the Inbox, right-click the desired message.
2. In the drop-down list, choose Move To Folder.
3. In the Move Items dialog box, select the Calendar option and click OK.
4. An Appointment form is opened with the subject from the email message and the message text attached.
5. Select the appropriate starting and ending dates and times of the appointment, and then type the desired location.
6. If necessary, in the Appointment form, select the desired options.
7. In the Appointment form, click Send.

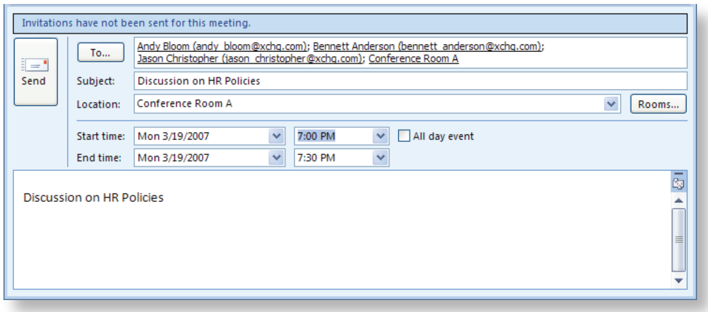
Create an Appointment from a Task

1. On the Tasks page, in the Tasks section, select the task that needs to be created as an appointment.
2. Choose Edit > Copy To Folder to move the task to the Calendar.
3. Verify that the Calendar is selected and click OK.
4. In the Date Navigator, select the current date to display the appointments and tasks for that date.
5. Open the Appointment form for the selected task.
6. Add an attendee and a room for the meeting.
7. Change the date and time for the meeting.
8. Send the invite.

Note: An event can also be created from a task.

Scheduling and Managing Meetings

Schedule a Meeting



1. In the Date Navigator, select the date of the meeting.
2. In the Appointment section, click the time you want the meeting to start.
3. On the Standard toolbar, click the New Appointment button drop-down arrow and select Meeting Request.
4. To address the request by using the Global Address List, click To.
5. In the list box, select the appropriate attendees, and then click Required.
6. In the list box, select the appropriate facilities, and then click Resources.
7. Select the appropriate attendees and then click Optional.
8. Click OK to return to the Meeting form.
9. Book rooms for meetings.
   - Specify the rooms from the Global Address List.
   - Specify the rooms in the Meeting form.
10. In the Subject text box, type a meeting subject.
11. From the End Time drop-down list, select an end time for the meeting.
12. On the Meeting tab, click the Scheduling Assistant button to check the availability of the attendees.
13. Scroll to the right or left to view the status of each attendee.
14. Select the desired options in the Meeting form.
15. In the Meeting form, click Send to send the meeting request.

Schedule a Recurring Meeting

1. Open a New Meeting form or an existing form.
2. Choose Actions > New Recurring Meeting.
3. Select the desired options, such as the start and end time, the recurrence pattern, and the number of recurrences.
4. In the Meeting form, type the desired subject.
5. Type the desired attendees and end time.
6. Change the start time in the Meeting form.
7. In the Location text box, specify the room for the meeting.
8. Type the optional attendees and resources.
9. In the Meeting form, click Send.

Update a Meeting Request

1. In the Calendar, open the Meeting form that needs to be updated.
2. Make the appropriate changes to the Meeting form. You can change the subject, the location, or the start and end dates and times.
3. In the Meeting form, click Send Update.

Cancel a Meeting

1. In the Calendar, select the meeting entry you want to cancel.
2. On the Standard toolbar, click Delete to cancel the meeting.
3. In the Meeting form, type a message.
4. Click Send Cancellation to send the cancellation message and remove the meeting from the Calendar.

Reply to a Meeting Request

1. In the Inbox, open the meeting request message.
2. Accept or decline the meeting request.
   - To accept the meeting request.
     a. On the Meeting tab, click Accept.
     b. In the Microsoft Office Outlook dialog box, click OK to send the response.
   - To decline the meeting request.
     a. On the Meeting tab, in the Respond group, click Decline.
     b. In the Microsoft Office Outlook dialog box, click OK to edit the response before sending.
3. In the message area of the response form, type a response, and then click OK.
4. In the Meeting form, click Send.

Propose a New Meeting Time

1. In the Inbox, open the meeting request message.
2. On the Message tab, in the Respond group, click the arrow on the Propose New Time button.
3. Select the desired options to set the start and end dates and times, and then click Propose Time.
4. In the message text box, type the response text, and then click Send.

Track Meeting Responses

1. Display the Calendar.
2. Display the date on which the meeting is scheduled.
3. Double-click the desired Meeting form to open it.
4. In the Meeting form, in the Show group, click the Tracking button to view the responses for the meeting. Click Close.

Working with Tasks and Notes

Create a Task

1. In the Navigation Pane, click Tasks.
2. On the Standard toolbar, click New Task.
3. Type a subject.
4. Select a start date and a due date.
5. If necessary, create a recurring event.
   a. On the Standard toolbar, click Recurrence to set the task as a recurring item.
   b. In the Task Recurrence dialog box, select the desired Recurrence Pattern option: Daily, Weekly, Monthly, or Yearly.
   c. In the Range Of Recurrence section, select the start and end date range, and then click OK.
6. From the Priority drop-down list, select a priority.
7. If desired, check the Reminder check box, and from the Reminder Calendar, select an appropriate date.
8. On the Standard toolbar, click Save & Close.

Assign a New Task

1. In the Navigation pane, select the Tasks tab.
2. On the Standard toolbar, click the drop-down arrow to the right of the New button and select Task Request from the drop-down list to open a new Task Request form.
3. In the To text box, type the user's name to whom you want to assign the task, and in the Subject text box, type the subject.
4. In the Due Date and Start Date text boxes, type the desired dates or click the drop-down arrows to select the dates from the calendar.
5. From the Priority drop-down list, select the desired priority: Normal, Low, or High.
6. Type a message in the note area.
7. Assign a color category to the task.
   a. On the Task tab, in the Options group, click Categorize and select All Categories to easily identify and group the associated items in the task.
   b. In the Color Categories dialog box, click New.
   c. Type a color category name, and then select a color.
   d. If necessary, select a shortcut key.
8. If you would like to keep an updated copy of the task on your task list or receive a status report when the task is complete, check the appropriate check boxes. Click Send.

Edit and Update a Task

1. To edit a task:
   a. Display the Tasks list and open the task you want to edit.
   b. Make the appropriate changes to the Task form.
   c. Save and close the Task form.
2. To update a task:
   a. Display the Tasks list.
   b. In the Complete column, check the check box for the task you have finished to mark the task as complete.

Reply to a Task Request

1. In the Inbox, open the task request message.
2. Reply to the task request.
   - To accept the task:
     a. On the Task tab, in the Respond group, click Accept to accept the task with comments.
     b. In the Accepting Task warning box, select the Edit The Response Before Sending option. Click OK.
     c. In the Message window, type your comments.
   - To reject the task:
     a. On the Task tab, in the Respond group, click Decline to decline the task with comments.
     b. In the Declining Task warning box, select the Edit The Response Before Sending option and click OK to send the response.
     c. A new Task form is displayed and the InfoBar states that you have declined this task.
     d. In the Message window, type your comments.
3. Click Send to send the reply.
4. Determine whether you are expected to send periodic updates about this task, and then send your reply.
   - On the Task tab, in the Show group, click Details.
   - Observe that the originator's user name is displayed in the Update List text box, indicating that updates will be sent to this user. On the Task tab, in the Show group, click Task, and then click Send.
5. Read the accepted task message.
   - Open the Task Accepted message.
   - Observe the message displayed in the InfoBar, which indicates that the other person has accepted this task, and close the message.
6. If necessary, reclaim ownership of a declined task.
   - Open the Task Declined message.
   - On the Task tab, in the Manage Task group, click Return To Task List and observe the due date that appears in the InfoBar.

Update Task Information and Send a Task Update

1. Open the task that you want to update.
2. In the Task form, type the updated information
   a. From the Status drop-down list, select the desired status: Not Started, In Progress, Completed, Waiting On Someone Else, or Deferred.
   b. From the Priority drop-down list, select the desired priority: Low, Normal, or High.
   c. In the % Complete text box, type the percentage.
   d. In the message body, type a message.
3. Send the status report.
   a. On the Task tab, in the Manage Task group, click Send Status Report.
   b. Type a status message and then click Send.
4. On the Task tab, in the Actions group, click Save & Close.

Track Assigned Tasks

1. Verify the updated task.
   a. Select the Tasks tab.
   b. Open the task and view the updated information.
   c. Close the Task form.
2. Verify the status report.
   a. Display the Inbox folder.
   b. Open the status report message. View the detailed status of the task displayed in the message.
   c. Close the message.
3. In the Navigation pane, in the Current View section, select the Assignment option to display the tasks that you have assigned to others.
4. Double-click the task that you wish to track to open it. The InfoBar shows the due date of the last update for this task. The information in the Task form reflects this update.

Create a Note

1. In the Navigation Pane, on the Quick Launch bar, click the Notes button to display the Notes folder.
2. On the Standard toolbar, click New to display a new Note.
3. Type the contents of the Note.
4. Assign a color category to the Note.

030623KC rev 1.0
ISBN-13 978-1-4246-0528-6
ISBN-10 1-4246-0528-8
90000
9 781424 605286