

Microsoft Outlook 2007 Tip Sheet

Standard Toolbar: buttons will change as you switch between Mail, Calendar, Contacts, etc.

Zantaz EAS Archive Toolbar: buttons will change as you switch between Mail, Calendar, Contacts, etc.

Navigation Pane: e-mail organized in folders. Right-click a folder to move, rename, create a new folder, etc.

Section Buttons: used to navigate to various sections of Outlook: Mail, Calendar, Contacts, etc.

Configure Buttons: click here to reposition and add/delete Section buttons or to customize the Navigation Pane.

Color Categories: Click to categorize this item. If a single click does not color code the item then click on the Categorize button and set the Quick Click. You can also right-click to customize the color.

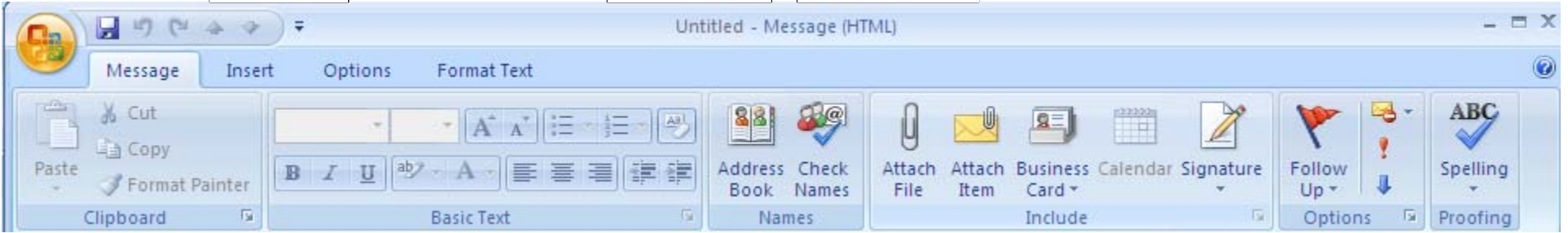
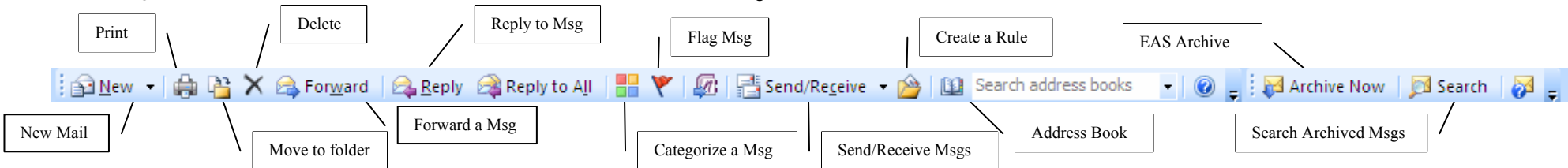
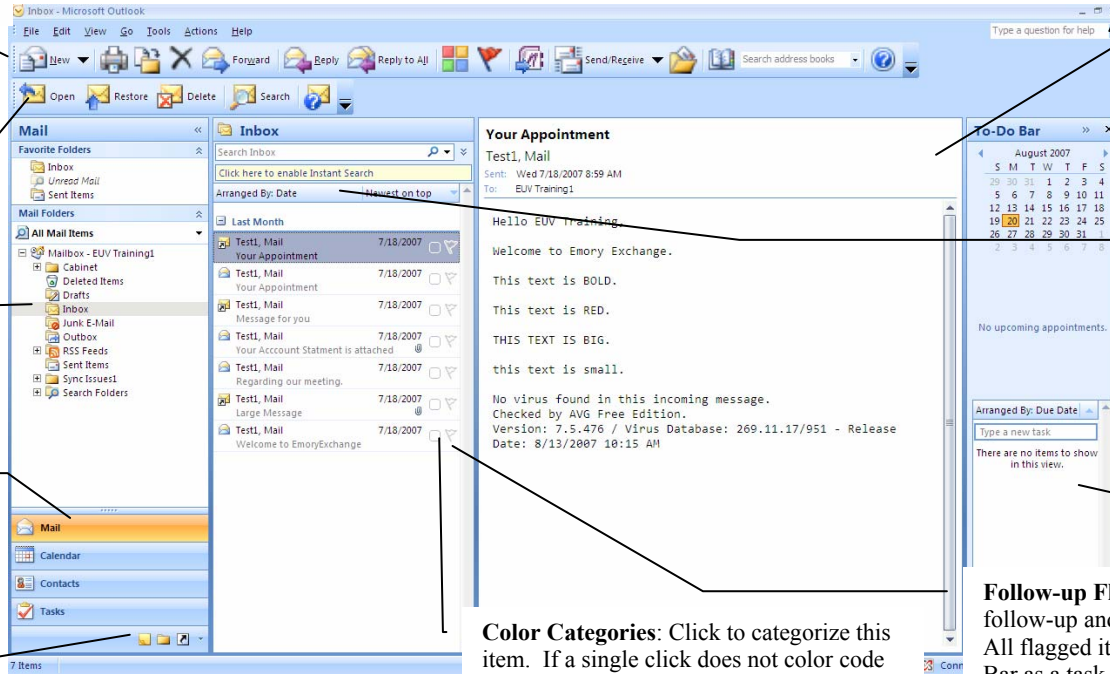
Follow-up Flag: Click to mark item as follow-up and display with a red flag. All flagged items appear in the To-Do Bar as a task. Right-click on flag to change the due date, clear the flag, etc. Click on a red flag to complete it.

Reading Pane: (Used to be called Preview Pane) Displays text of the selected message. Go to View-Reading Pane to show on bottom of screen or to turn off. To resize the Reading Pane, drag the border with the mouse.

Arranged By: Messages are grouped or arranged by a field. (Here they are arranged by conversation). By default they are arranged by Date. Go to View-Arrange by... Show in Groups to turn this feature on or off. Click on the grey bar labeled "Arranged By: ..." to arrange the e-mails by another field.

To-Do Bar: Displays a calendar with the next 3 events and all the tasks.

Ask a Question Help: Type in your questions here to get help then press Enter.



The ribbon is used when creating new email, appts, tasks, contacts. The Quick Access toolbar shows at the top with five buttons on it. You can add more by clicking on the drop-down arrow. The file menu has been replaced with the MS Office button. In a new mail, there are 4 Command Tabs: Message, Insert, Options, & format Text. You can double-click a tab to show/hide the ribbon. Each tab is then divided into groups (i.e. the message tab has 6 groups). You can still get to dialog boxes by clicking on the small arrow on the bottom-right of each group!

Creating Folders

1. Right click on the **Mailbox** in the Navigation Pane OR right-click on an existing folder to create a sub-folder.
2. Click on **New Folder...**
3. Type a name for the new folder
4. Click **OK**.


Selecting Multiple Messages

- To select several consecutive msgs. click on the first msg and then press **[Shift]** and click on the last msg.
- To select several non-consecutive msgs. click on the first msg. and then press **[Ctrl]** and click on additional ones.


Moving Messages

1. Make sure you can see the folder that you want to move messages into in the Navigation Pane. (Click on the + sign before the Inbox to expand it and show all folders if necessary)
2. Drag and drop a message from the View Pane into the appropriate folder in the Navigation Pane.


Sending Msg. Low/High Importance

1. When creating a message, click the high or low priority button on the ribbon in the Message Tab on the Options group. 
2. To revert to normal importance, click the same button again.

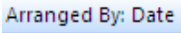
Flagging Messages for Follow-up

1. Click on the flag for that message. 
- Right-click on flag to change color of flag, add reminder to flag, or clear a flag.
- Flagged msgs. will appear as a task in the To-Do bar.
- Click on flag to complete the follow-up work and remove it from the Tasks area.

Categorize Messages

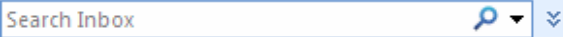


1. Click on the block for that message to assign a category or clear a category. (If nothing happens then right-click on the block and set up Quick Click.) 
- Right-click on block to edit color or category.
- All categorized items will appear in the Navigation Pane under Search Folders – Categorized Mail...

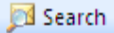
Changing Sorting Order (Arranged By)

1. Click in the Arrange By: Date area. 
2. Select how you want to arrange the messages by.

Searching Messages

1. Click in the Search Inbox and type the info. you are looking for.

 Search Inbox  

2. Press Enter or click on the magnifying glass to perform the search.
- If you are using the VDT environment than it is recommended to use the search button on the archive toolbar instead of the method described above 
- The Search button on the archive toolbar will search all messages in the mailbox and in the archive that are more than 1 day old.

Creating Appointment/Meeting

1. Click on the **Calendar** in the Navigation Pane
2. Click on **New Appointment** button
3. Type in the appropriate information.
4. Click **Save and Close** or **Send**.
- Use the buttons on the ribbon to set options for this appointment/meeting.
- Click on the **Invite Attendees** button on the ribbon to create a meeting and invite others.
- Click on the **Scheduling Assistant** button on the ribbon to check invitee's availability.
- To select another time that is good for all attendees & rooms, select another time under Suggested Times.

Shared Calendars

- The person whose calendar you are trying to view must first grant you rights to access their calendar by using the Share My Calendar link on the Navigation Pane.
1. Click on Open a Shared Calendar...
 2. Type in the person's name whose calendar you are trying to see or use the To: button to select the appropriate person
 4. Click **OK**.
 - After you open a shared calendar once, it will appear in the navigation pane in the future.

Creating a Distribution List

1. Click on **File – New – Distribution List...**
2. Type the name of your distribution list
3. To add members from your address book, click on **Select Members...** Choose a person from the list and click **Members** -> OR to add members that are not in your address book, click on **Add Members...** type in their display name and email address
4. Click **OK** and **Save and Close**
 - There is a size limitation of approximately 100 people in any one distribution list

Deleting Items

1. Select the items that you want to delete and press the Delete button OR just drag and drop them into **Deleted Items**
 - To recover a deleted item, click on **Deleted Items** and drag and drop the items back into the area that they came from (Mail, Calendar, Contact, etc.)
 - Messages will stay in the Deleted Items folder for 7 days and are available to recover. After 7 days they will be automatically removed from the Deleted Items folder. They will then be available to recover for 7 more days but only by calling the Help Desk.

Archiving Mail (using Zantaz EAS Archive Server)

- Any messages over 1 MB will automatically archive after 7 days and a “stubbed” message will remain in the mailbox. Any message under 1 MB will automatically archive after 30 days and a “stubbed” message will remain in the mailbox.
- All messages will be removed from the mailbox after 180 days (including all stubbed messages) but will be available to restore from the archive.

Setting Up Out Of Office Message

1. Click on **Tools – Out of Office Assistant...**
2. Select the **I am currently Out of Office** option
3. Click inside the text box and write the message that you want to send while you are away.
 - When you return to the office and start Outlook, a box will pop up asking if you want to turn off the Out of Office Assistant, select **Yes**.
 - The Out of Office Assistant can also be turned on/off in Outlook Web Access.