



Microsoft Outlook 2007 E-mail System

Quick Reference Guide

Welcome to MS Outlook 2007

This **Quick Reference Guide** will help you use **MS Outlook 2007** to send e-mail messages, create and manage folders, view and share calendars, add contacts, create signatures; and use the Quick Access Toolbar and Ribbon Tabs.

Sending Messages

- ❖ Click on the Mail section button on the Navigation Pane
- ❖ Click on the New button
- ❖ Either type in the e-mail addresses, using a semi-colon to separate addresses, OR click on the To...button to select names from the address book. (If you need to add BCC to the screen, click on the Options tab, then click on Show BCC.)

- ❖ Click in the Subject area to type in a subject
- ❖ Click in the message area to type in a message
- ❖ (Optional) Click on the paperclip button to add an attachment if necessary.
- ❖ (Optional) Click on the signatures button to insert signatures.
- ❖ (Optional) Click on the red exclamation button to designate high priority.
- ❖ (Optional) Click on the Options tab to use voting buttons, request a delivery or read receipt, delay the delivery of the message, etc.
- ❖ (Optional) Click on the Format Text tab to format any text.
- ❖ Click on the Send button to send the message.

Sorting, Viewing and Grouping Messages

The view pane allows you to change the sort, view and grouping of messages.

- ❖ Click on the *Arranged by... button*; choose your sorting order (or use the view menu).
- ❖ Ungroup your messages by clicking on the *Arrange by...button* and clicking on *Show In Groups* which will turn the grouping option off.

Creating Folders

Keeping too many messages in your Inbox can make it difficult to sort through and find the messages you need in a hurry. A healthier approach is to create personal folders and regularly move messages out of your Inbox and into the folders.

** We recommend you create your personal folders under the **main Mailbox** instead of under the Inbox due to synchronization speed for mobile devices and Web use.

- ❖ To create a folder, right-click on the Mailbox and choose New Folder...
- ❖ You can also create folders within folders.
- ❖ If you are accustomed to the GroupWise e-mail system, create a main folder called "Cabinet" and place your personal folders under the Cabinet.

Moving Messages

You can move messages by dragging and dropping them into the appropriate folder.

- ❖ Use the shortcut keys (Ctrl & Shift – see the side panel under Tips & Tricks) to select multiple messages and move them all at once.
- ❖ You can also move messages automatically by creating rules.
- ❖ You can create rules to automatically move, delete, and flag messages.
- ❖ To create a rule, select Tools-Rules and Alerts... New Rule...

Calendar Views

You can decide how many days you want to see on the calendar by choosing the buttons across the top of the screen:

- ❖ Day
- ❖ Week (Show Work Week or Show Full Week)
- ❖ Month

Displaying Previous or Next

You can quickly display previous or next Days, Weeks, or Months by clicking on the arrow keys

Date Navigator

The date navigator (the window pane in the top left (or right) corner that shows the months) can be used to customize the days displayed in the appointment screen.

- ❖ Click and hold on the month to see a list of other months
- ❖ Use the Control key to select days that are not in consecutive order
- ❖ Use the Shift key to select days that are in consecutive order
- ❖ Click to the left of any week to select the entire week
- ❖ Resize the window to show more months

Sharing Calendars

For you to see someone else's calendar, he/she has to give you permission.

- ❖ Open Outlook Calendar and click on *Share My Calendar*. This will display the permissions screen for the calendar.
- ❖ Click the *new button* and select the person to give rights to.
- ❖ Then select which rights to give that person by putting a check mark in the desired options.

To see someone else's calendar; once you have been given rights;

- ❖ Open up your Outlook Calendar and click on *Open a Shared Calendar...*
- ❖ Select the person's name whose calendar you are trying to see and click *OK*.
- ❖ Both calendars will be displayed on the screen at once.
- ❖ Once you open someone else's calendar for the first time, you will not need to go through the same steps to open it in the future since all previously viewed calendars will be listed in the navigation pane on the left side of the screen.
- ❖ Control whose calendar and how many calendars to see by placing check marks on the desired calendars. Take the check mark off to stop displaying that calendar.

Adding Contacts

You can add contacts two ways:

- ❖ Switch to your Contacts book and click on the *New button*. Fill out contact information and click on *Save and Close*.
Or,
- ❖ Drag a mail message to the Contacts section button on the Navigation Pane. This will automatically create a contact.

Creating a Signature

You can create a signature that automatically appears at the base of all your outgoing messages.

- ❖ To create a signature, click on *Tools – Options – Mail Format – Signatures...New...*
- ❖ Type in a name for this signature,
- ❖ Choose how to create your signature,
- ❖ Click *Next*, and type in your desired signature.
- ❖ Click *Finish and OK* when done.
- ❖ The last signature you create will be set as the default signature as shown under Signature for new messages:

If you don't want to default to any signature (you would rather insert the signature manually when needed), then change the Signature for new messages to None.

- ❖ To manually insert a signature, use the Insert Signature button on the Insert tab when creating a message and select the desired signature.

Quick Access Toolbar

The Quick Access Toolbar always shows at the top of the screen, no matter what tab is selected below. This toolbar provide access to the most commonly used commands:

- ❖ Save
- ❖ Undo
- ❖ Redo
- ❖ Next and Previous buttons

Adding other useful buttons to this toolbar is **highly recommended**. Simply click on the drop-down arrow at the end of the toolbar and select those commands you use often.

Ribbon Tabs

Commands are organized by their functionality. When creating a new mail message, for instance, there are four ribbon tabs:

- ❖ Message
- ❖ Insert
- ❖ Options
- ❖ Format Text.

Once you click on a tab, then the related buttons are organized in Groups. For example, when creating a new message, the Message tab is divided into five groups:

- ❖ Clipboard
- ❖ Basic Text
- ❖ Names
- ❖ Include
- ❖ Options
- ❖ Proofing.

The name of the group is displayed on the bottom of the ribbon and may also have a small button with an arrow on it. Clicking on this button will bring up the dialog boxes for those features or the appropriate task pane seen in previous versions of MS Outlook.