

# Outlook 2007: Part I

Stephen Moffat, The Mouse Training Company

 Microsoft®  
Office 2007

## Outlook Part I



Stephen Moffat

# Outlook 2007

## Part I

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Outlook 2007: Part I

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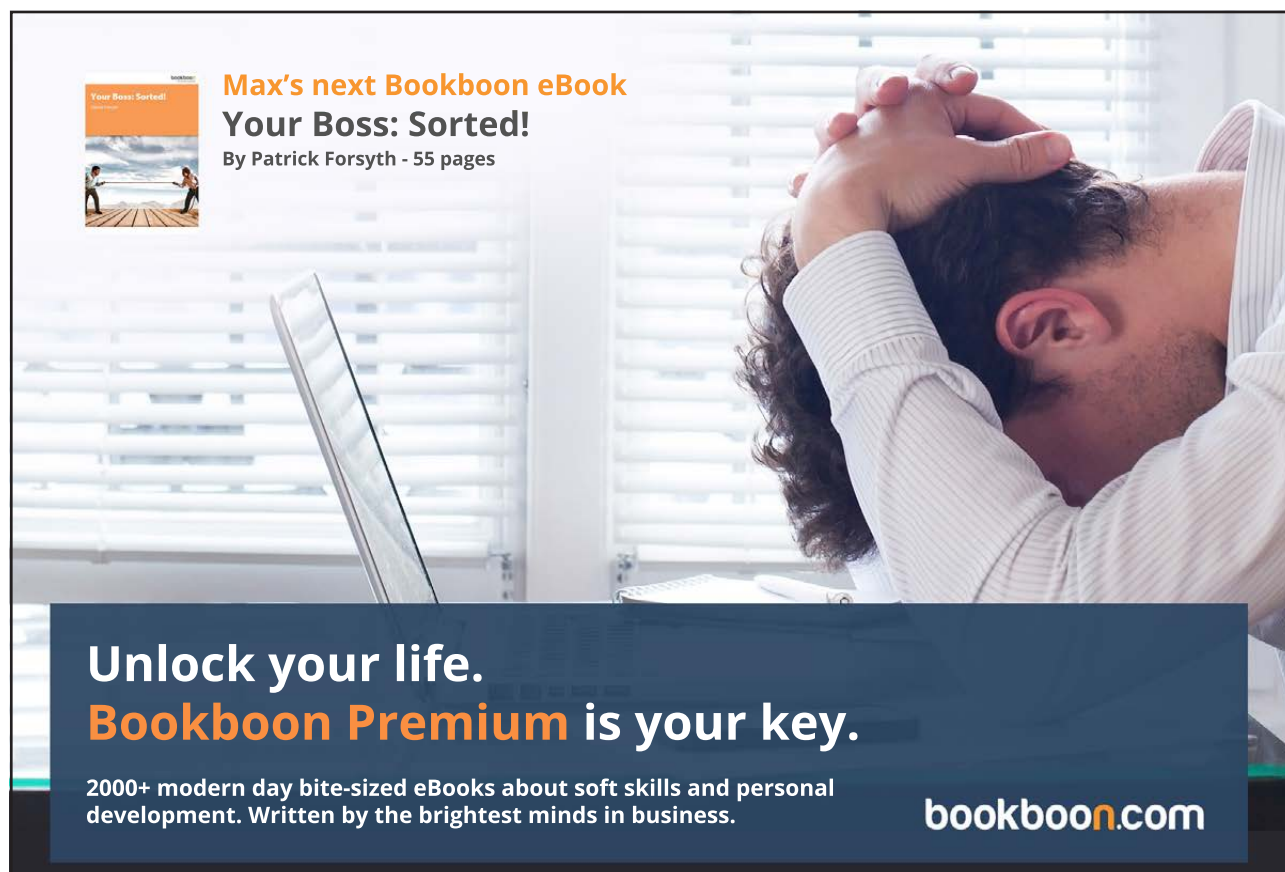
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Part II

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# Foreword

This course was written for trainees wishing to learn to use Microsoft Outlook. It is written for using Microsoft Outlook in the Office 2007 suite of applications. However, it does not include a 'New Features' section exclusively about new features in Microsoft Outlook within Office 2007. It is very easy to see a complete list of the new features in Office v2007 in the Help menu on-screen. This courseware cannot and should not compete with the comprehensive coverage of new features detailed by Microsoft within the application's help files. To do so would be to hinder learning the raw application.

What this course seeks to do is teach the trainee Outlook in the hope that he/she may be able to go and work just as well using v2002 for example and other versions. Wherever possible, 'version functionality' is purposely avoided.

# Section 1 Outlook Essentials

## Objectives

At the completion of this lesson you will be able to:

- Z
- Get Help
- Print Documents
- End an Outlook Session

## Topics

Foreword

Getting Started

Exploring the Outlook Window

Navigating in Outlook

Getting Help

Choosing an Office Assistant

Obtaining Context-Sensitive Help

Printing Documents

Setting Up the Page

Selecting Additional Printing Options

Previewing and Printing a Document

Ending an Outlook Session

Minimizing and Restoring Outlook

Exiting from Outlook and Logging Off

Assignment

## Foreword

This is an introductory course and it is therefore assumed that the student or delegate is new to Outlook. It is for this reason that the new features are not listed exhaustively in the opening chapters of a course aimed at beginners. This is especially relevant with Office. There are many new features in Outlook and many new features that are more general to the Office 'super application' or suites.

For this reason, the new Outlook features are stored in two appendixes (A and B) at the end of this course, together with an overview of the new features in Word in Appendix C. Delegates who are taking this course as a refresher may like to turn to them now. Although most of the new features can be found in the appendixes it is not a complete catalogue and delegates wishing to delve deeper into the subject ought to sit an Outlook Upgrade course.

## Getting Started

Microsoft Outlook is a software program that helps you manage your messages, your time, and your documents. Every day you have a variety of appointments and tasks, you send and receive messages, you open and close documents, you make notes, you call your colleagues and contacts, and you manage your files. Outlook integrates all these features into one program with one database. Outlook is most effective when used on a *network*, that is, when it is used with two or more computers that are physically connected.

With Outlook, you can record simple and complex appointments and resolve conflicting appointments. You can keep a list of tasks, somewhat like the to do list you might have on your desk, record information about business and personal contacts, review who you phoned and when, store notes and reminders to yourself, plan events for the entire year, and even track birthdays and anniversaries.

## Method

To start Outlook and log in:

1. Log in to the network.
2. On your desktop, double-click the Outlook icon.
3. If necessary, in the Profile or Mail dialog box, in the appropriate text box, type your user ID.
4. In the Password text box, type your password.
- 5) Choose OK.

## Exercise

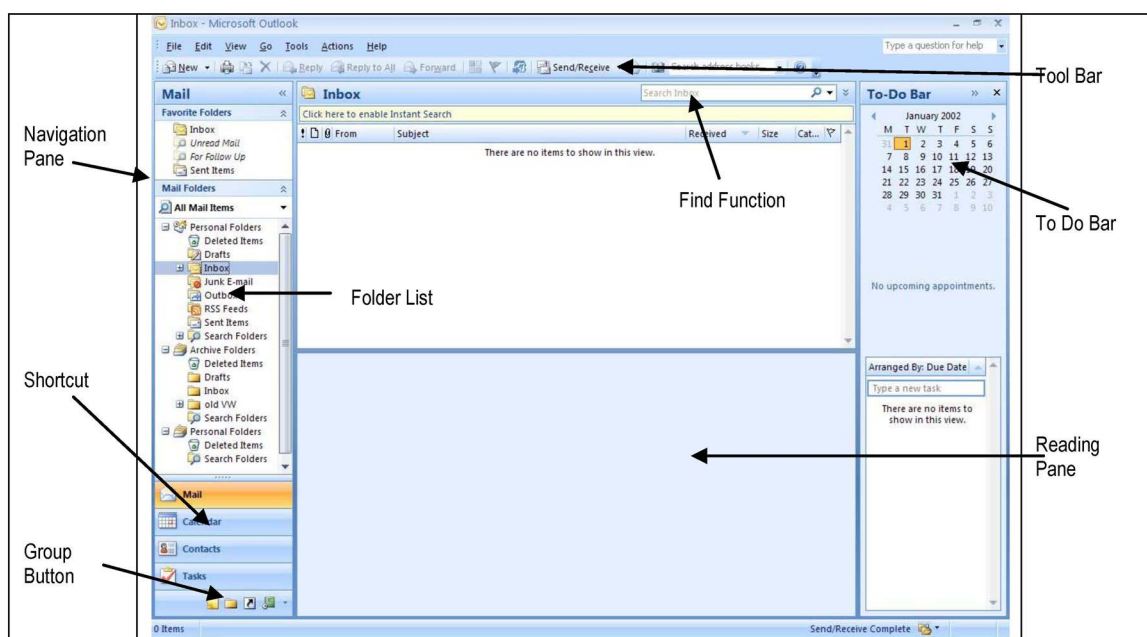
In the following exercise, you will start Outlook and log in.

1. Follow your instructor's directions to start your computer and log in to the network
2. Double-click the Outlook icon *You may be prompted for network or E-Mail profile information.*
3. If necessary, in the Mailbox text box, type your user ID as provided by your instructor
4. In the Password text box, type your password as provided by your instructor
5. Choose OK *The Outlook window appears.*

## Exploring the Outlook Window

The Outlook window, as illustrated in Figure 1-2, appears at start up. The window opens in its non-maximized view displaying the Inbox. The window contains a title bar, menu bar, and status bar common to other Microsoft application windows. The toolbar contains context sensitive tools.

The Navigation pane (previously called the Outlook Bar) is a screen element that contains *shortcuts* to the folders, where you store your information. You use the shortcuts, which store the folder location, just as you would use shortcuts on your desktop. You click a shortcut to access the information in your Inbox, your Calendar, your contact list, your task list, your Journal, and your notes. For example, when you click the Inbox shortcut, a list of the messages you received appears in the *reading pane*, that area of the Outlook window that displays the data for whatever folder is active. Group buttons at the top and the bottom of the Outlook Bar give you access to additional shortcuts to your remaining mail folders and to your file management folders. The To Do Bar is a new addition for 2007 and shows a preview of your outlook calendar and lists your up and coming tasks.



**Figure 1-2:** The Components of the Outlook Window

Table 1-1 describes the components of the Outlook window.

| Component       | Function   |
|-----------------|--|
| Navigation Pane | Holds folder shortcuts (icons) and buttons. Click a shortcut to activate an Outlook folder. Click a group button to access a different group of folders. |
| Folder List     | Helps for easy navigation between folders. The display is more akin to the Windows Explorer.   |
| Toolbar         | Holds context-sensitive buttons that provide shortcuts for many menu and keyboard commands.  |
| To Do Bar       | Shows a preview of your outlook calendar also allows you to see up and coming appointments and tasks.  |
| Find Function   | Allows you to search your Inbox for a particular message using specific criteria, e.g. Date, name, subject   |
| Shortcuts       | Icons on the Outlook Bar that provide access to Outlook folders.   |
| Group buttons   | Buttons that reveal additional groups of Outlook shortcuts.  |
| Reading Pane    | If switched on, shows a preview of the selected E-Mail message.  |
|                 |  |

**Table 1-1:** Outlook Window Components

## Navigating in Outlook

### The Navigation Pane

Microsoft Outlook consists of the Navigation Pane, which is your time management tool; the Mail group, which lets you process your e-mail; and personal and archive folders which allow you to store and sort old emails.

Each Outlook feature functions as a program on its own, yet, because Outlook integrates the data into one database, the features work together to let you pull data from one directly into another.

The Navigation Pane gives you access to the Inbox, Calendar, Contacts, Tasks, Journal, Notes, and Deleted Items folders. The Mail group gives you access to the Inbox, Sent Items, Outbox, Deleted Items folders, Personal and Archive folders. The Inbox folder in the Outlook group is the same Inbox folder that is in the Mail group. You simply access it from different groups. The Deleted Items folder is also accessible from both folders.

You use the Outlook Bar shortcuts and the *Folder Banner* to navigate from folder to folder within Outlook. You can also use the Go menu to move from folder to folder.



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**Table 1-2** gives a brief description of each folder.

| Shortcut  | Folder        | Function   |
|---|---------------|--|
|    | Inbox         | Holds and displays incoming e-mail. Available in Outlook and in Mail.  |
|    | Calendar      | Lets you create and manage appointments, schedule meetings, and respond to invitations. Also gives you access to your tasks. Available in Outlook. |
|    | Contacts      | Holds your phone and address list. Available in Outlook.   |
|    | Tasks         | Lets you list and prioritize what you need to do. Available in Outlook.  |
|    | Journal       | Tracks e-mail, phone calls, and files you open. Available in Outlook.  |
|    | Notes         | Lets you store and organize information you would normally jot down on paper or sticky notes. Available in Outlook.                                |
|    | Deleted Items | Stores deleted items so you can retrieve them, if necessary. Available in Outlook and in Mail.   |
|  | Sent Items    | Holds copies of e-mail you have sent. Available in Mail.   |
|  | Outbox        | Holds e-mail you sent that your e-mail system has not yet forwarded to the recipient. Available in Mail.   |
|  | Search Folder | Search Folders display the results of previously defined search queries. The messages shown remain stored in one or more Outlook folders.          |
|  | Junk E-Mail   | The Junk E-mail Filter is on by default, which is designed to catch the most obvious junk e-mail messages.   |
|  | Draft         | Outlook automatically saves all unfinished messages for you. By default, unfinished messages are saved to your Drafts folder.                      |

**Table 1-2:** The Outlook Bar Folders and Their Functions

The simplest way to navigate from folder to folder is by using the group buttons and the shortcuts on the Outlook Bar.

### Method

To navigate in Outlook:

### Navigation Pane method

1. On the Outlook Bar, click the desired group button.
2. Click the desired shortcut.

### Exercise

In the following exercise, you will navigate in Outlook.

- |  |   |
|--|---|
| 1. If necessary, maximize the window                                 |   |
| 2. At the bottom of the Navigation Pane, click the Mail group button | <i>The Mail group button moves to the top of the Outlook Bar. The Mail shortcuts appear.</i>  |
| 3. Click the Sent Items shortcut                                     | <i>The words <b>Sent Items</b> and an envelope graphic appear on the Folder Banner. A list of your sent items appears.</i>  |
| 4. Click the Notes folder  | <i>The word <b>Notes</b> and a graphic of a sticky note appear on the Folder Banner. Large icons of your notes appear in the information viewer.</i>  |
| 5. From the Go menu, choose Contacts                                 | <i>The word <b>Contacts</b> and a rotary card file appear on the Folder Banner. The information viewer shows the beginning of your contact list in alphabetical order and displays alphanumeric tabs for access to additional contacts.</i> |
| 6. At the top of the Outlook Bar, click the Outlook group button     | <i>The Outlook Bar displays the Outlook shortcuts.</i>  |
| 7. Click the Calendar shortcut                                       | <i>The word <b>Calendar</b>. Your Calendar for today appears. You have no appointments for today. You do have three tasks.</i>  |

### Getting Help

As a new user, you need to know where you can get help. When you have a question about Outlook, you can access online help quickly and easily. You can display ToolTips, use Outlook Help, obtain a list of Help topics from Help Contents, or search for information about a specific topic using Help Index and Help Find. If you need help when you are using a dialog box, you can choose the Help button in the dialog box to see its related Help box.

In Outlook, the simplest Help aid is ToolTips. A Tooltip appears when you point the mouse pointer to a button on the toolbar. For example, if you point to the Print button, the Tooltip *Print* appears. If you click the Print button, you print the document.

## Using Outlook Help



**Figure 1-3:** Accessing Outlook Help

As shown in Figure 1-3, in the top right hand Corner of the screen you can type a question for help. Clicking on the Question Mark or using the help menu will open the help function giving you an overview of what is available in help.

### Method

To use Outlook Help:

1. Click the question mark icon to open the help function
2. When help opens you can click through the topics listed or use the search command.
3. 2. Type your query into the “Type a question for help” box
4. 2. Select an appropriate article from the displayed help topics.

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## Exercise

In the following exercise, you will use Outlook Help.

- |     |   |  |
|-----|---|--|
| 1.  | On the toolbar, click the Question Mark Icon                                      | <i>The Help screen will load. Giving you a choice of topics and a search bar</i> |
| 2.  | In the search box, type <b>calendar</b>   |  |
| 3.  | Choose Search   | <i>The results of your search are displayed.</i>                                 |
| 4.  | Click the "Outlook Home" link at the top of your search results box               | <i>This returns you to the Help Screen</i>                                       |
| 5.  | Position the mouse pointer over the call out containing the words Email Messages  | <i>The pointer becomes a hand.</i>   |
| 6.  | Click the call out  | <i>A help screen that explains Email Messages appears.</i>                       |
| 7.  | Click the "Outlook Home" link at the top of your search results box               | <i>This returns you to the Help Screen</i>                                       |
| 8.  | Click another call out  | <i>The help screen explaining the item appears.</i>                              |
| 9.  | Continue to examine the Help window, and, when you are finished, close the window |  |
| 12. | Type "Email Accounts" into the "Type a question for help" box and press return    | <i>The help screen loads with suitable help topics relating to your query</i>    |
| 13. | Choose a suitable article   | <i>Close the help window</i>   |

## Obtaining Context-Sensitive Help

You might sometimes need help when using a dialog box. During any step of a dialog box process, clicking the question mark to the left of the dialog box Close button and then clicking the area of the dialog box about which you have a question displays a *ScreenTip*, context-sensitive information about the area.

## Method

To obtain context-sensitive help:

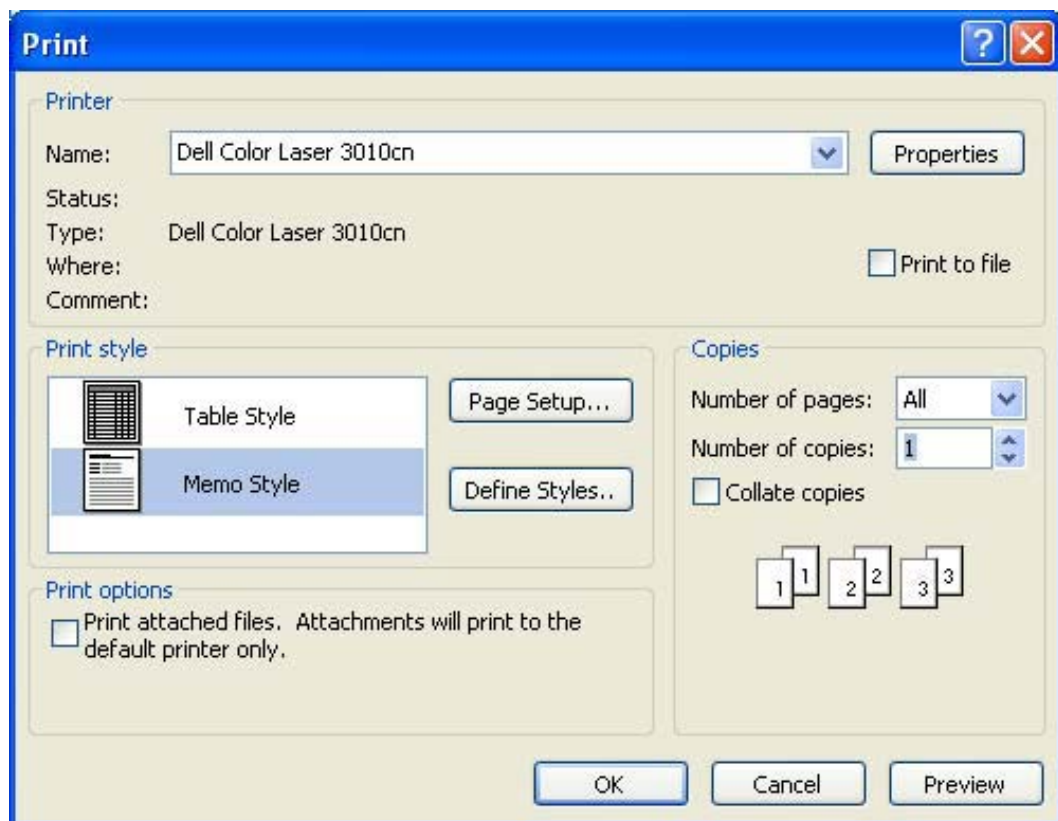
1. In any dialog box, click the question mark to the left of the Close button.
2. Click the area where you want help.
3. Read the information, and then click anywhere.

In the following exercise, you will obtain context-sensitive help.

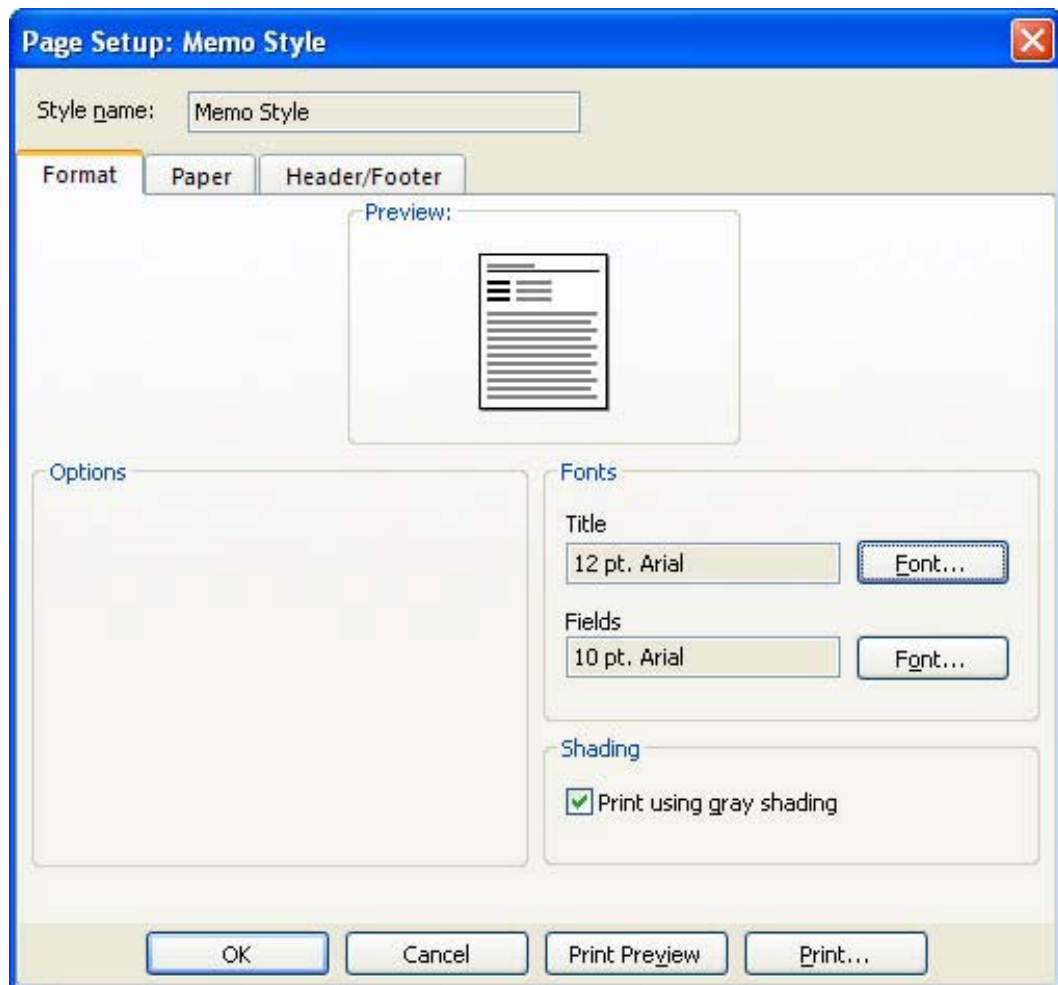
- |   |   |
|---|---|
| <ol style="list-style-type: none"> <li>1. Make sure the Calendar is open</li> <li>2. From the Tools menu, choose Options</li> <li>3. Click the question mark to the left of the Close button</li> <li>4. Click the area where you want help.</li> <li>5. Read the information, and then click anywhere</li> <li>6. Choose Cancel to close the dialog box</li> </ol> | <p><i>The Calendar page of the Options dialog box appears.</i></p> <p><i>A question mark appears beside the mouse pointer.</i></p> <p><i>The help information appears.</i></p> <p><i>The help information disappears.</i></p> |
|---|---|

## Printing Documents

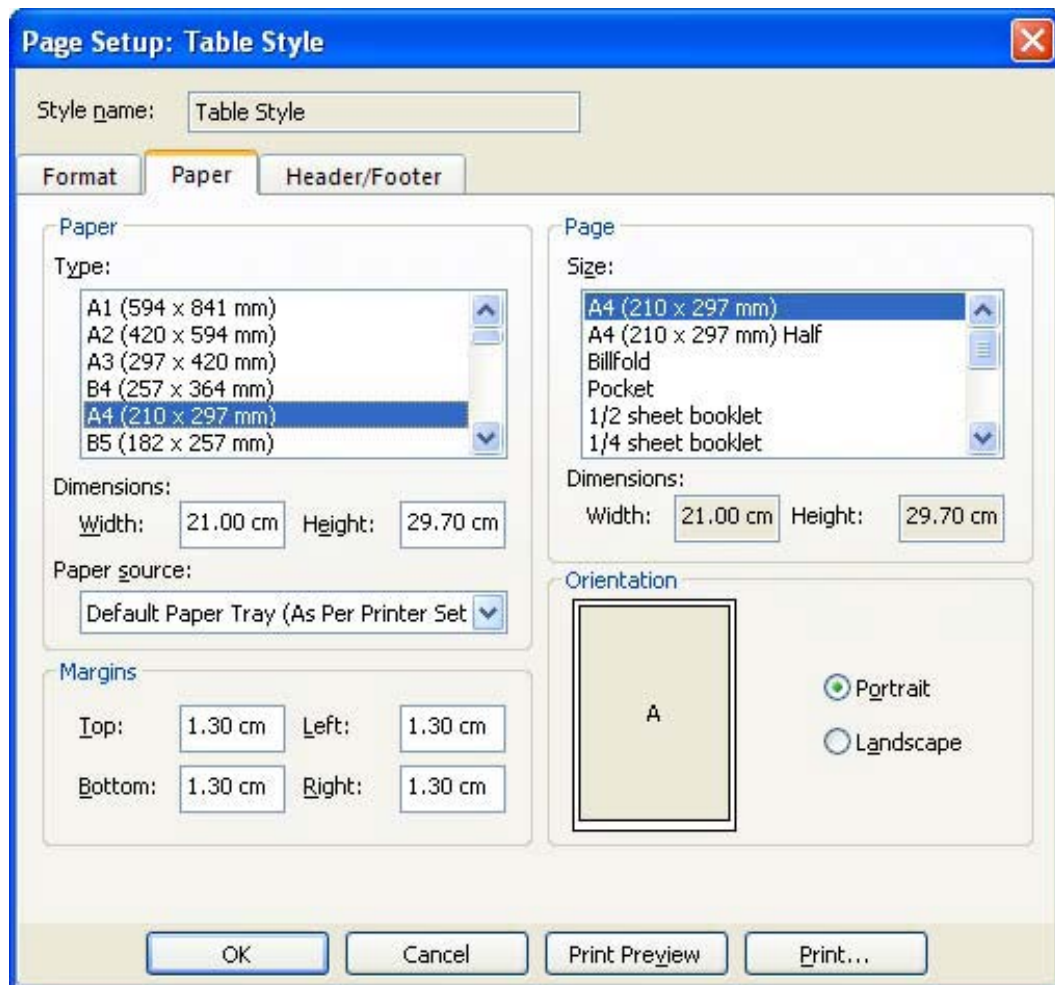
You can print any Outlook files to carry with you when you are out of the office. If you usually carry a paper day planner, you can print the file in the size and layout of your planner. Using the Print dialog box, shown in Figure 1-6, and the Page Setup dialog box, shown in Figure 1-7, you can select from a variety of layouts and print any number of sequential days for your calendar. You can print your contact list in numerous styles and sizes, including a size for your rotary card file. You can print your e-mail, your journal, and your tasks, as well. You can choose to preview your selection before printing to ensure that your layout, paper format, and date or alphabet range is correct.

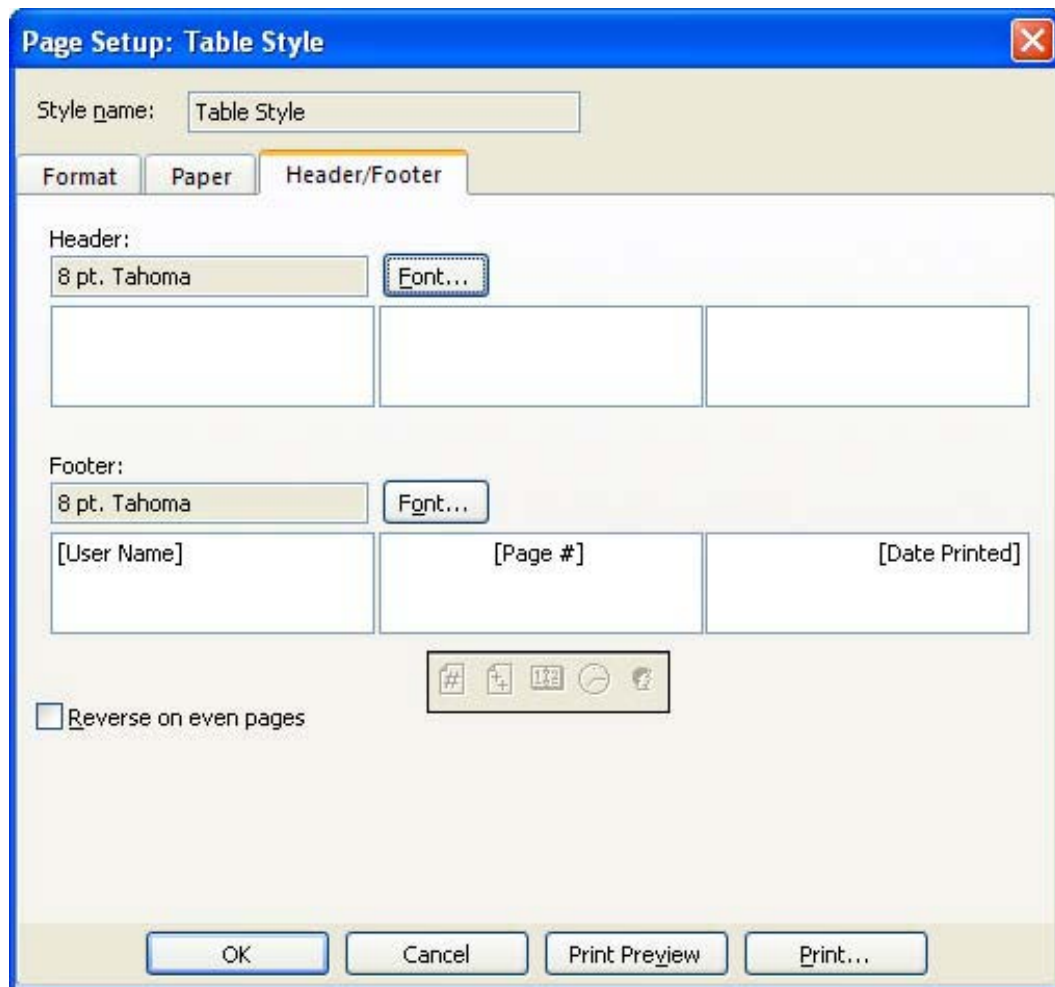


**Figure 1-2:** The Print Dialog Box









**Figure 1-3:** The Page Setup Option

## Setting Up the Page

You might want to print today's schedule to carry to a local appointment, or you might prefer to print a full week's or month's schedule to take with you on a business trip. You might also need to print your Task list or your Contacts list. Outlook lets you print your information in whatever layout you specify and lets you customize the page.

### Method

To set up the page for printing:

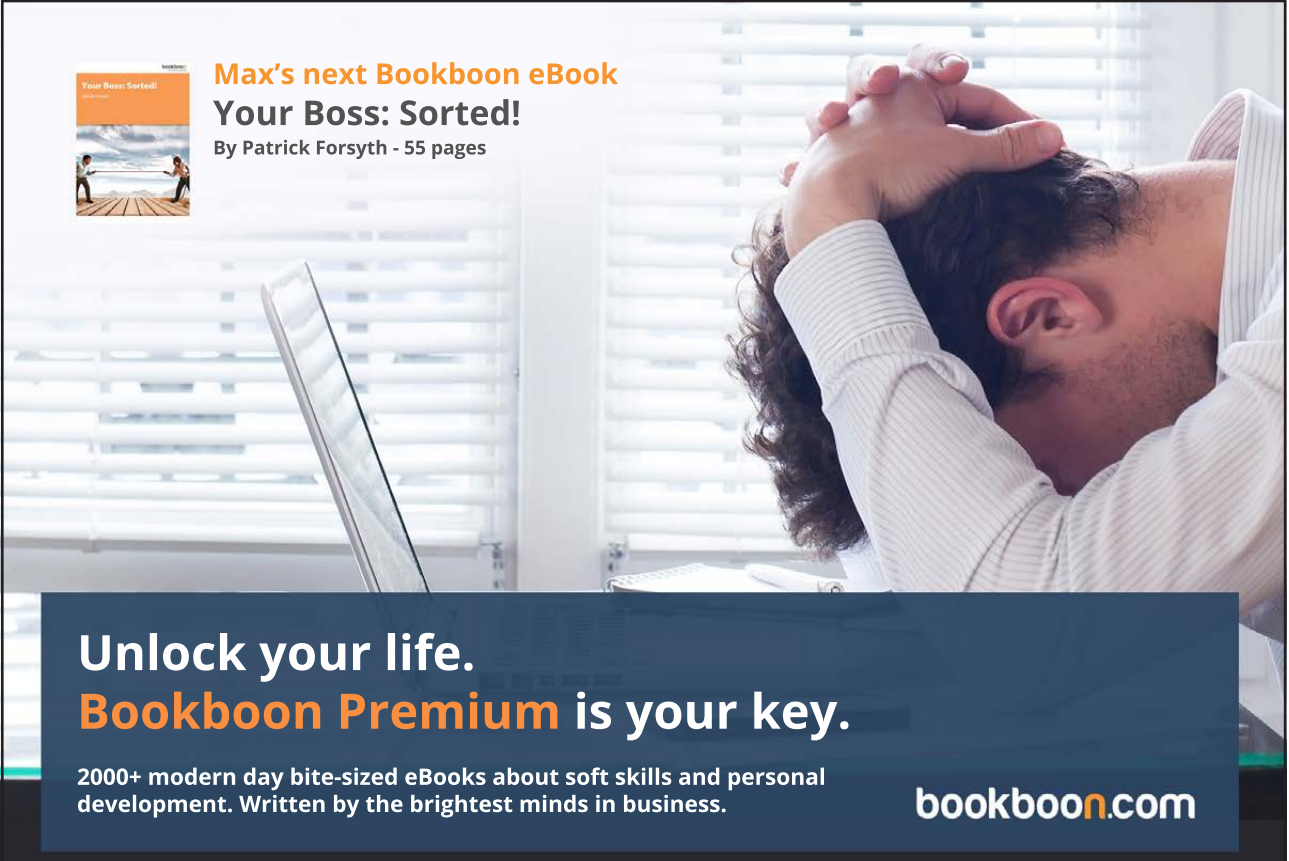
1. Open the Folder from which you want to print.
2. From the File menu, choose Print.
3. In the Print dialog box, choose Page Setup.
4. In the Page Setup dialog box, on the Format page, select the options you want.
5. Select the Paper tab.
6. On the Paper page, in the Paper area, select the options you want.

7. If desired, select the Header/Footer tab, and then type the desired header and/or footer.
8. Choose OK.

### Exercise

In the following exercise, you will set up the page for printing.

1. Make sure the Calendar is open
2. From the File menu, choose Print *The Print dialog box appears.*
3. Choose Page Setup *The Page Setup dialog box appears.*  
On the Format page, in the Options area,
4. from the Print from drop-down list, make sure 9:00 AM is selected
5. If necessary, from the Print to drop-down list, select 9:00 PM
6. Select the Paper tab *The Paper page appears.*  
If necessary, in the Paper area, in the Type
7. list, select Custom (the last selection in the list)
8. If necessary, in the Page area, in the Size list, select Day Timer Junior Pocket *The preview pane in the Orientation area shows four pages.*
9. Choose OK *The Print dialog box reappears.*



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## Selecting Additional Printing Options

You can select additional printing options in the Print dialog box. This is where you select the style and the range of your printout.

### Method

To select additional printing options:

1. Open the Print dialog box.
2. In the Print Style area, from the list of previews, select a style.
3. In the Print Range area, from the drop-down lists, select the range.

### Exercise

In the following exercise, you will select additional printing options.

1. Make sure the Print dialog box is open
2. In the Print style area, from the Print style list, select Weekly Style
3. In the Print Range area, make sure the Start drop-down list displays today's date
4. From the End drop-down list, select the date one week from yesterday

## Previewing and Printing a Document

You should preview your documents before printing them to make sure you have set your options exactly the way you want them. When you are satisfied with the appearance, you can print your document.

### Method

To preview a document:

1. In the Print dialog box, choose Preview.
2. If desired, in the Print Preview window, position the magnifier over the area you want to examine in detail, and then click the area.
3. If dissatisfied with the appearance of the document, on the toolbar, choose Page Setup to open the Page Setup dialog box and to reset options. Then choose OK to return to the Print Preview dialog box.

To print a document from Print Preview:

1. On the toolbar, choose the Print button.
2. In the Print dialog box, choose OK.

To print a document from the Print dialog box:

1. Choose OK.

## Exercise

In the following exercise, you will preview and print your Calendar.

- |    |   |  |
|----|---|--|
| 1. | In the Print dialog box, choose Preview   | <i>The Print Preview window appears displaying your Calendar for the current week.</i>   |
| 2. | Position the magnifier over the date at the top left, and then click the area     | <i>The date area is magnified.</i>   |
| 3. | Click the area again  | <i>The Calendar zooms out to show the full week.</i>   |
| 4. | On the toolbar, choose Page Setup   | <i>The Page Setup dialog box appears.</i>  |
| 5. | If necessary, in the Options area, select the Arrange Top to bottom option button | <i>The Preview area shows the days of the week arranged to print top to bottom, Monday through Wednesday in the left column and Thursday through Sunday in the right column.</i> |
| 6. | In the Options area, select the Arrange Left to right option button               | <i>The Preview area shows the days of the week arranged to print left to right, Monday through Sunday.</i>   |
| 7. | Choose OK   | <i>The Print Preview window reappears.</i>   |
| 8. | Choose Print  | <i>The Print dialog box appears.</i>   |
| 9. | Choose OK   | <i>The Calendar for this week and next is printed.</i>   |

## Ending an Outlook Session

As with any Windows application, when you are not actively using a program, you can choose to minimize it or exit from it. After checking your mail and your calendar at the beginning of the day, you might want to minimize Outlook. This lets you check for messages periodically without signing in and out of the program repeatedly. When a new message comes in you will get a desktop alert and an envelope icon (Figure 1-8) will appear in your System Tray. It also lets Outlook send you reminders before your appointments.



**Figure 1-8**

At the end of the work day, you should exit from Outlook and log off.

## Saving Your Data

In many applications, you must take some action to save your data as you work and when you finish your work session. In a database application such as Outlook, many actions you take are automatically saved.

When you make entries in the information viewer, you activate the area of the pane in which you are working. As long as you are working in that area, you can freely make changes. When you write an appointment directly on your Calendar, write a note, write a task directly on your to do list, or enter an activity directly in your journal, Outlook saves your data as soon as you click anywhere outside the activated area.



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You can also enter appointments, contacts, tasks, and journal items using windows Outlook provides. These windows allow you to enter far more detailed information than you enter directly in the information viewer. The windows have a button on the toolbar that lets you save and close the window; only in these windows do you indicate whether to save. If you close such a window without saving, Outlook provides a message box that asks, “Do you want to save change?” to warn you that you are closing the window without saving your data and to give you another opportunity to save what you entered.

When you receive a message, Outlook automatically saves it in your Inbox. After you read the message, you can have Outlook continue to save it in your Inbox or you can tell Outlook to save it in another folder. When you create an e-mail message to send, you can save it in your Inbox to send later or you can send it immediately, having Outlook automatically save it in your Sent Items folder.

## Minimizing and Restoring Outlook

By minimizing Outlook rather than exiting from it, you can quickly return to Outlook to check your messages, appointments, and notes. When you minimize Outlook, Outlook continues to run in the background. The application is represented on the taskbar by a button that displays the active Outlook folder, as shown in Figure 1-9. When you have numerous programs running, the entire title is not usually visible.



**Figure 1-** When you have numerous programs running, the entire title is not usually visible.



**Figure 1-9:** Taskbar Showing Outlook Buttons

**Figure 1-9:** Taskbar Showing Outlook Buttons

When you want to restore the Outlook window, you simply click the Outlook button on the taskbar.

## Exiting from Outlook and Logging Off

Two exit options are available from the File menu—Exit and Exit and Log Off. When you use Exit, your Exchange-enabled applications continue to run. For example, if you receive an e-mail after you exit but you haven’t logged off, then Exchange notifies you that mail has arrived by displaying the envelope icon on the right end of the taskbar. You can reopen Outlook to open your mail.

Choosing Exit and Log Off closes Outlook. If any Exchange-enabled applications are running, Outlook closes them also. Use this option at the end of the day.

## Method

To exit from Outlook:

1. From the File menu, choose Exit.  
or
2. Click the Close button.

To exit from Outlook and log off:

3. From the File menu, choose Exit and Log Off.

## Exercise

In the following exercise, you will exit from Outlook and log off.

1. From the file menu, chose Exit and Log Off      *Outlook is closed.*

## Assignment

1. Start Outlook and log in.
2. In the Mail Folders group, open the Deleted Items folder.
3. Switch to the Navigation Pane and read the notes in the Notes folder.
4. Ask the Outlook Help to give you information about making a recurring appointment.
5. From the Tools menu, choose Options. On the General page of the Options dialog box, in the General settings area, use context-sensitive help to learn what the Large toolbar icons option does.
6. Open the Contacts folder. Prepare to print your address cards in Card Style. If necessary, in the Page Setup dialog box, on the Paper page, select letter paper with the page sized for the Day Runner Classic paper planner. Preview and then print your cards.
7. Exit and log off from Outlook.
8. Restart Outlook and log in.

# Section 2 Communicating with Mail

## Objectives

At the completion of this lesson you will be able to:

- Use the Inbox
- Understand the Ribbon
- Compose a New Message
- Forward and Reply to Messages
- Manage Messages Using Folders

## Topics

Using the Inbox

Checking for New Messages

Previewing and Opening Messages

The Ribbon

Selecting and Printing a Message

Closing a Message

Sorting Messages

Filtering Messages

Composing a New Message

Addressing and Typing a Message

Editing Text

Formatting Text

Using AutoComplete

Including an AutoSignature with a Message

Correcting Spelling as You Type

Sending a Message

Forwarding and Replying to Messages

Replying to a Message

Managing Messages Using Folders

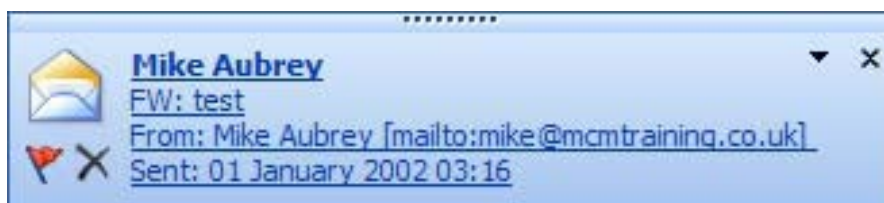
Moving a Message to a Folder

Deleting and Restoring a Message

Assignment






## Using the Inbox

When new mail arrives in your Inbox, Outlook notifies you. Whether you are working in Outlook or have Outlook minimized and are working in another program, Outlook makes a sound and displays an envelope icon on the taskbar when new mail arrives. Outlook also briefly changes your mouse pointer to the shape of an envelope to notify you of your new message. In Outlook 2007 you will also get a screen prompt in the lower right hand corner of the screen that will fade away after around 5 seconds (Fig 2-1).



**Figure 2-1** : Mail prompt for new messages

The Inbox, the Outbox, the Sent Items folder, and the Deleted Items folder display the same context-sensitive Mail toolbar. Table 2-3 summarizes the functions of these toolbar buttons.

| Button  | Name             | Function  |
|---|------------------|---|
|  | New Mail Message | Opens the New Mail Message window so you can compose and send a message. The drop-down arrow gives you access to the New windows for the other Outlook features.  |
|  | Forward          | Converts a message you received into a new message to which you can add comments. Then you can send the message to someone else.  |
|  | Reply to All     | Converts a message you received into a new message to which you can add comments. Then you can send the message and your comments to the sender and to everyone else who received the original message. |
|  | Reply            | Converts a message you received into a new message to which you can add comments. Then you can send your comments to the sender.  |
|  | Address Book     | Stores the e-mail addresses of all the names in your post office.   |

**Table 2-3:** The Mail Toolbar Buttons

## Checking for New Messages

Outlook checks your postoffice/Exchange server for new messages on a timed basis. The default checking time is every ten minutes. When you're in Outlook, you can override this feature and check for new messages any time you want.

## Method

To check for new messages:

1. From the Tools menu, choose Send and Receive.

## Exercise

In the following exercise, you will check for new messages.

1. From the Tools menu, choose Send and Receive

*Any incoming messages are delivered to your Inbox.*



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## Previewing and Opening Messages

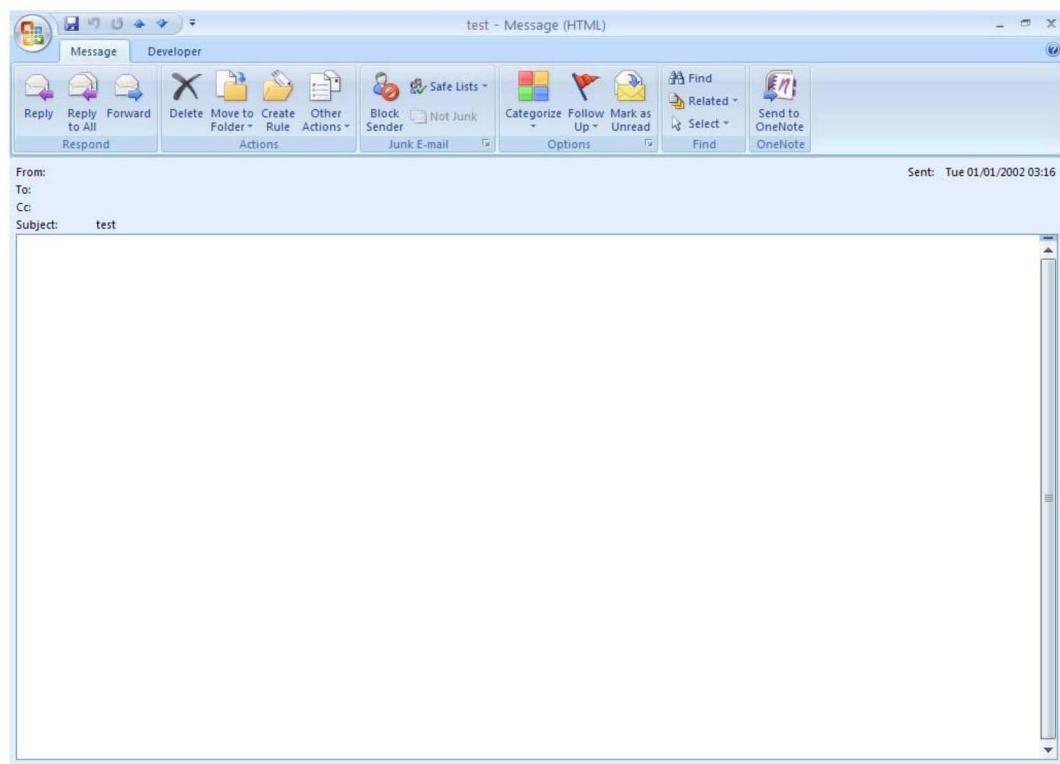
Messages that others have sent you are stored in your Inbox. If you select the Inbox folder in the Outlook bar, a list of your messages appears in the information viewer. Each entry in the *message list* gives you information about the message, such as who sent it and its subject. This information is listed under the column headers, described in Table 2.2.

| Column header   | Function                                  |
|---|---|
|    | Indicates message importance.             |
|    | Indicates message type.                   |
|    | Indicates whether there is an attachment. |
| From  | Identifies the sender of the message.     |
| Subject   | Identifies the subject of the message.    |
| Received ▼  | Indicates when the message was received.  |
| Categories  | Indicates Category of message             |
| Size  | Indicates the size of the file.           |
|  | Flags the message for later action.       |

**Table 2-4:** Column Headers

Messages that you haven't read appear in bold in the message list. You can preview messages by setting the message list to show you the first few lines of the message. When you open the full message, it appears in a message window, illustrated in Figure 2.2.





**Figure 2-2:** The Message Window with a Received Message

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## Method

To preview messages:

1. If necessary, on the Outlook Bar, click the Inbox shortcut.
2. From the View menu, choose AutoPreview.

To open a message:

1. If necessary, on the Outlook Bar, click the Inbox shortcut.
2. In the message list, double-click the message.

## Exercise

In the following exercise, you will preview messages and you will open a message.

1. From the View menu, choose AutoPreview *All messages display their first three lines.*
2. In the message list, double-click the **Outlook** message *The Message window opens.*
3. Read the message

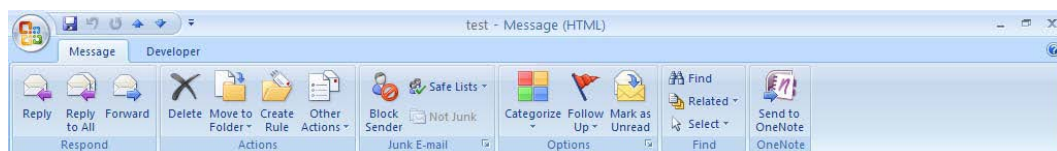
## The Ribbon

The Ribbon is the strip of buttons and icons located above the Message area in Outlook 2007.

The Ribbon replaces the menus and toolbars found in earlier versions of Outlook.

Above the Ribbon are a number of tabs, such as Home, Insert, and Page Layout. Clicking on a tab displays the options located in this section of the ribbon.

For example, when you click to read a message or create a new message in Outlook 2007 the mail ribbon is displayed, the options under the Message tab are displayed by default(see image below Figure 2-3). These options are grouped according to their function - such as Message (includes reply and forwarding options), and Actions (includes delete, move to folder, create rule and other actions options).



**Figure 2-3:** Message Ribbon

Clicking on an option on the ribbon may lead to further options contained in a Contextual Menu that relate specifically to the option chosen.

## Selecting and Printing a Message

You can print the message that is currently displayed. You can also print a message without opening it.


### Method

To select a message:

1. In the message list, click the message.

To print a message:

1. Open the message.  
or
1. In the message list, select the message.
2. On the toolbar, click the Print button.



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## Exercise

In the following exercise, you will print a message.

1. Make sure the **Outlook** message is open
2. On the toolbar, click the Print button *The message is printed.*

## Closing a Message

When you have finished reading a message, you should close it. The message still appears in your message list, but the text that appears is no longer bold.

### Method

To close a message:

1. In the Message window, click the Close button.

## Exercise

In the following exercise, you will close a message.

1. In the **Outlook** message window, click the Close button *The message is closed. The text that appears is no longer bold in the message list.*

## Sorting Messages

You can sort your messages by any item shown in the column headers of the message list. To sort your messages, simply click the column header on which you want to sort. By default, the first time you click the column header the sort occurs in ascending order. The next time you click the column header it sorts in descending order.

### Method

To sort messages:

1. In the message list, click the desired column header.
2. If desired, click the column header again to change the sort order.

## Exercise

In the following exercise, you will sort messages.

- |    |  |   |
|----|--|---|
| 1. | Click the Sent Items shortcut in the folder list | <i>The contents of the Sent Items folder appear in the information viewer.</i>    |
| 2. | In the column headers, click the To header       | <i>The messages are sorted in alphabetical order based on the recipient name.</i> |
| 3. | Click the Sent column header                     | <i>The messages are sorted by date and time order.</i>                            |
| 4. | Click the Sent column header again               | <i>The messages are sorted by date order opposite to the preceding step.</i>      |

## Filtering Messages

You can *filter* your data in each Outlook folder by selecting a filter from the Current View drop-down list. When you filter messages, you display a specified subset of messages.

The Inbox Current View drop-down list gives you numerous criteria to use to filter the messages. Table 2-5 summarizes the Inbox Current View filters.

| Name                      | Function  |
|---------------------------|---|
| Messages                  | Shows the subject line of all messages in the folder.   |
| Messages with AutoPreview | Shows the subject line and the first three lines of all unread messages in the folder. Shows the subject line only of other messages. |
| Last Seven Days           | Shows only those messages received in the last seven days.  |
| Unread Messages           | Shows unread messages only.   |
| Sent To                   | Shows who else received the same message.   |
| Message Timeline          | Graphically shows when each message was received.   |

**Table 2-5:** The Inbox Current View Filters

## Method

To filter messages:

1. On the toolbar, click Arrange by.
2. From the drop-down list, select Current view.
3. Choose OK.

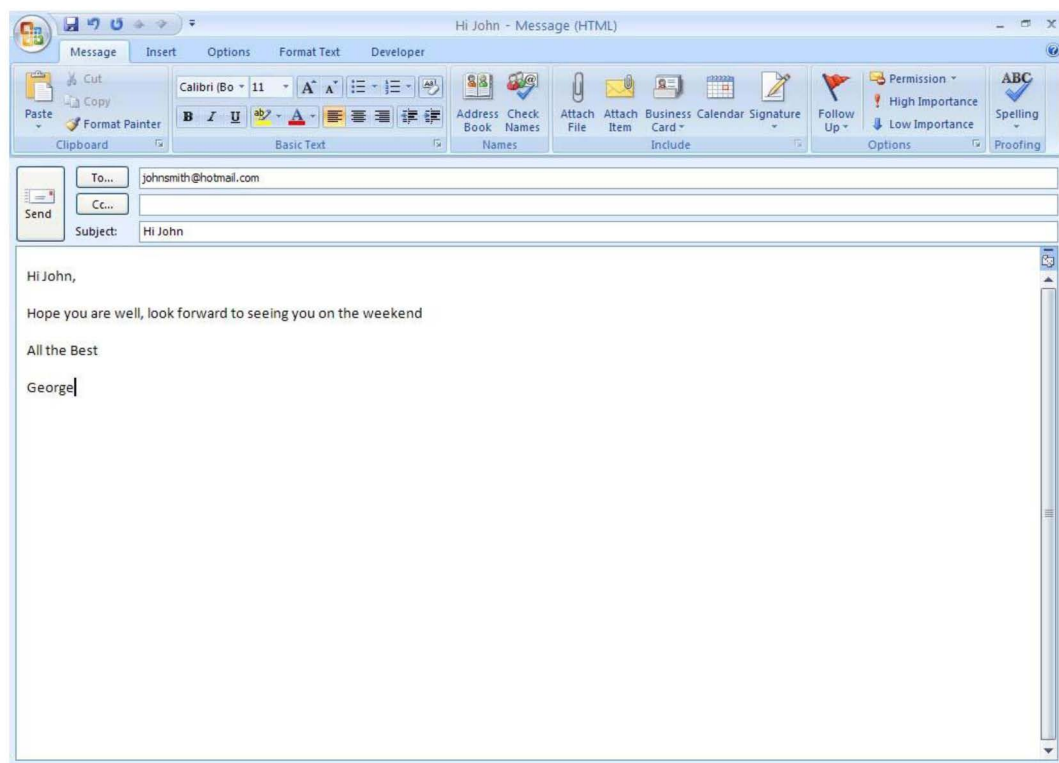
## Exercise

In the following exercise, you will filter messages.

1. Make sure you are in the Sent Items folder
2. On the toolbar, click Arrange by option. *The drop-down list appears.*
3. From the drop-down list, select By Conversation Topic *The messages are grouped by subject.*
4. Click the Current View drop-down list arrow from the Arrange by option. *The drop-down list appears.*
5. From the drop-down list, select By Message Flag *The messages are all grouped as normal; no messages are flagged.*
6. Filter the messages by Sent To

## Composing a New Message

To compose a new message, you use the New Message window, shown in Figure 2-4. You can open the New Message window from any Mail folder by clicking the New Mail Message button on the toolbar.



**Figure 2-4:** The New Message Window with a New Message to Send

To create and send a message, you must do three things. First, you must address the message. Second, you must type the body of the message, and third, you must send the message.

The ribbon on the New Message window differs from the ribbon in the message window as it has more tabs available, Shown in Figure 2-5, facilitate creating, formatting, checking, addressing and sending the message..

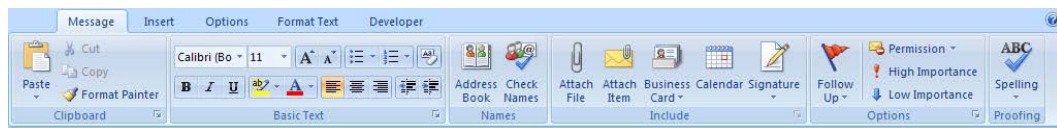


Figure 2-5 : Compose Message Ribbon

## Addressing and Typing a Message

To address a message, type the recipient's *email address* e.g. *joe.bloggs@somewhere.com* or the recipients *user name* in the 'To' text box. A user name is a unique name assigned to each Outlook user on your network. You can address a message to more than one recipient by separating each user name with a comma or a semicolon. If you'd like to send a courtesy copy of your message, type the recipient's name in the 'cc' text box.

You can also type the first few characters of the recipient's user name and then, if Outlook can match the characters you typed with a user name, Outlook fills in the remainder of the name for you automatically. When an underline appears beneath a name in the 'To' text box, this indicates that Outlook has verified the name in the postoffice/server.

You should always type a short subject in the Subject text box. Your subject becomes the text in the line that the recipient sees in his or her message list when not using AutoPreview or the first line when using AutoPreview.

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You can move from field to field by pressing Tab or by positioning the mouse pointer in the desired field and clicking the mouse button. After you've finished addressing the message, you can move to the message area and type your message.

## Method

To address and type a message:

1. Check names method
2. In any Mail folder, on the toolbar, click the New Mail Message button.
3. In the New Message window, in the To text box, type the recipient's user name.
4. If sending the message to multiple recipients, type , (comma) or type ; (semicolon), and then enter the next name.
5. Repeat step 3 as necessary.
6. If desired, in the Cc text box, type a user name(s).
7. In the Subject text box, type a short subject.
8. In the message area, type the text of your message.

**NOTE: WHEN YOU TYPE THE FIRST FEW CHARACTERS OF THE RECIPIENT'S USER NAME, OUTLOOK CAN SOMETIMES IDENTIFY A MATCH FOR THE CHARACTERS ENTERED, AND YOU NEED NOT TYPE THE FULL NAME.**

## Dialog box method

1. In any Mail folder, on the toolbar, click the New Mail Message button.
2. In the New Message window, choose To.
3. In the Select Names dialog box, select a name from the list.
4. Choose To.
5. Repeat steps 3 and 4 as necessary.
6. Choose OK.
7. If desired, choose Cc.
8. In the Select Names dialog box, select a name from the list.
9. Choose To.
10. Repeat steps 8 and 9 as necessary.
11. Choose OK.
12. In the Subject text box, type a short subject.
13. In the message area, type the text of your message.

## Exercise

In the following exercise, you will address a message. Then, you will type your message.

1. On the toolbar, click the New Mail Message button *The New Message window appears.*
2. If necessary, maximize the New Message window
3. In the To text box, type your partner's user name
4. Choose Cc *The Select Names dialog box appears.*
5. Select your instructor's name
6. Choose Cc
7. Choose OK *The New Message window reappears.*
8. In the Subject text box, type Mail Activated
9. In the message area, type the following text, including the grammatical error:  
My Microsoft Outlook post office has been activated. I look forward to communication with you electronically.

## Editing Text

After you type a message, you might need to make some changes before you mail the message. There might be misspelled words or grammatical errors. You might decide to add or delete text. In Outlook, you can *edit*—insert, delete, and replace text—in any message you are composing.

The procedure for inserting and deleting text in Outlook is the same as in most Windows word-processing applications. You add text by placing the insertion point where you want to insert the text and typing the text. You move the insertion point by positioning the I-beam and clicking the mouse or by using the arrow keys. There are two ways to delete text. You can position the insertion point in the correct location and press **Delete** or **Backspace**, or you can select the text with the I-beam (drag the mouse to highlight the desired text) and press **Delete**.

Selecting text and then typing the replacement text lets you replace many characters quickly. You can easily replace a single word or a block of text ranging from a few words to several paragraphs.

## Method

To insert text:

1. Position the insertion point where you want to insert the text.
2. Type the text.

To delete text:

1. Position the insertion point behind the first character you want to delete.
2. Press **BACKSPACE**  
or
1. Position the insertion point in front of the first character you want to delete.
2. Press **DELETE**  
or
1. Position the I-beam in front of the first character you want to delete.
2. Drag the I-beam over the text to be deleted.
3. Press **BACKSPACE** or **DELETE**

To replace a block of text:

1. Position the I-beam in front of the first character you want to replace.
2. Drag the I-beam over the text to be replaced.
3. Type the replacement text.



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To replace a word:

1. Double-click the word.
2. Type the replacement text.

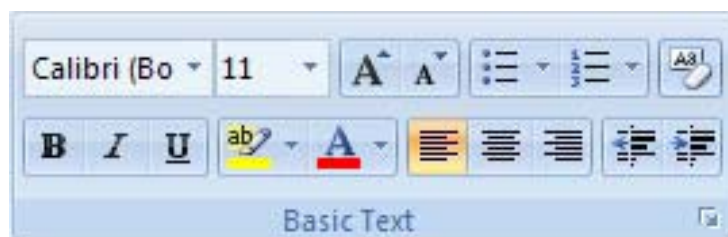
## Exercise

In the following exercise, you will edit text.

1. In the message you just typed, in the first sentence, place the insertion point between the word *activated* and the period
2. Press **SPACEBAR** and then type **today** *The text is inserted, and existing text is pushed forward.*
3. Place the insertion point after the word *communication* in the second sentence
4. Press **BACKSPACE** twice *Two letters are deleted.*
5. Without moving the insertion point, type **ng** *Two letters are inserted.*
6. In the first sentence, position the I-beam in front of the *h* in the word *has*
7. Drag to select the words *has been*
8. Type **is** *The text is replaced.*
9. In the second sentence, double-click the word *electronically* *The word is selected.*
10. Type **via e-mail** *The word is replaced.*

## Formatting Text

The Ribbon contains two areas for editing text in the Message Tab in the Basic Text group Figure 2-6 where you can bold, italicize, and underline text. You can also change the color of the text, add bullets, and change the alignment. In addition, you can change your font with the Font and Font Size drop-down lists. In the Format Text tab Figure 2-7 where more advance commands such as styles exist.



**Figure 2-6 :** Basic Text editing tools

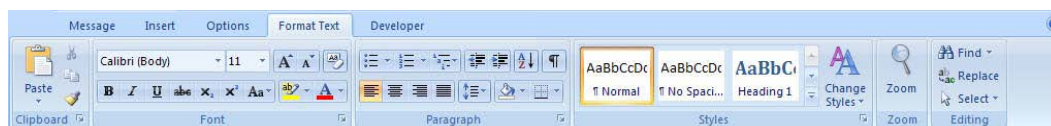


Figure 2-7 : Format text Ribbon

Table 2-6 describes the buttons on the Basic Text grouping.

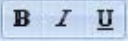


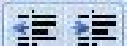
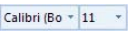



| Button  | Name                               | Function  |
|---|------------------------------------|---|
|    | Bold, Italic, Underline            | <b>Bolds</b> the selected text. <i>Italicizes</i> the selected text. Underlines the selected text.  |
|    | Highlight Text, Change font colour | Highlights text as would a highlighter pen. Changes the font colour   |
|    | Align Left, Centre, Align Right    | Left-aligns selected text in the message. Centre-aligns selected text in the message. Right-aligns selected text in the message.                        |
|    | Increase indent, Decrease indent   | Increases and Decreases the indentation of the text.  |
|   | Font Type, Font Size               | Changes the font type e.g. Arial, times etc. Changes the font size  |
|  | Grow Font, Shrink Font             | Increases and decreases font size   |
|  | Bullets, Numbering                 | Changes the selected text to bulleted text so that it starts with a bullet. Changes the selected text to numbered text so that it starts with a number. |
|  | Clear Formatting                   | Clears all formatting on selected text.   |

Table 2-6: Basic text formatting tools

**NOTE: MANY OTHER MAIL PROGRAMS CAN PROCESS ONLY ASCII, OR PLAIN TEXT, MESSAGES. USERS OF THESE PROGRAMS WILL NOT SEE YOUR FORMATTING.**

## Method

To format text:

1. Select the text you want to format.
2. Select the message ribbon, on the Basic Text Group, click the desired button.
3. If desired, from the Font drop-down list, select a font.
4. If desired, from the Font Size drop-down list, select a font size.

## Exercise

In the following exercise, you will format text.

- |     |  |  |
|-----|--|--|
| 1.  | In the first sentence, select the word <i>Outlook</i>                            | <i>The word is highlighted.</i>                            |
| 2.  | On the toolbar, click the Italic button  | <i>The word is italicized.</i>                             |
| 3.  | In the second sentence, select the words <i>via e-mail</i>                       | <i>The words are highlighted.</i>                          |
| 4.  | On the toolbar, click the drop-down arrow to the right of the Font Colour button | <i>The colour palette is displayed.</i>                    |
| 5.  | Choose Blue  | <i>The words are coloured blue.</i>                        |
| 6.  | Select the word <i>today</i>   | <i>The word is highlighted.</i>                            |
| 7.  | From the Font drop-down list, select any font                                    | <i>The font for the word is changed.</i>                   |
| 8.  | From the Font size drop-down list, select 12                                     | <i>The font size for the word is changed to 12 points.</i> |
| 9.  | On the toolbar, click the Centre button  | <i>The message is centred.</i>                             |
| 10. | On the toolbar, click the Align Right button                                     | <i>The message is right-aligned.</i>                       |
| 11. | On the toolbar, click the Align Left button                                      | <i>The message is left-aligned.</i>                        |



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## Using AutoComplete

*AutoComplete* automatically types such words as dates, salutations, and closures that are commonly found in messages. For example, if you start to type the word *Monday*, *AutoComplete* shows the word *Monday* as a tip in a box above your text once you type the letters *Mond*. If you indeed want to type the word *Monday*, you press **Enter** to accept the *AutoComplete* text and then type your next word. If you don't want to type *Monday*, you should just continue typing.

### Method

To use *AutoComplete*:

1. Begin to type a word.
2. When the *AutoComplete* tip appears, press **ENTER**

### Exercise

In the following exercise, you will use *AutoComplete*.

1. Position the insertion point at the end of your message, and then press **ENTER** twice
2. Type **your** *AutoComplete* causes the tip **Yours truly**, to appear in a box above your text.
3. Press **ENTER** *AutoComplete* types the rest of your phrase.

## Including an AutoSignature with a Message

You can automatically include your name, a standard message, or any other text at the end of every message you send. You can choose a handwriting or calligraphy font for your *AutoSignature* to make it look as if you scanned it in. If you prepare a message on which you don't want to include your *AutoSignature*, you can delete it.

### Method

To include an *AutoSignature* with a message:

1. In a new message, type and format your name as you want it to appear in your *AutoSignature*.
2. Click the Signature Button in the Include grouping on the Message tab and click signatures
3. In the *AutoSignature* message box, type a name for your new signature.
4. Click Add.
5. Choose whether to make it the default signature and whether to include it in replies.
6. Click OK.
7. Click OK.



## Exercise

In the following exercise, you will include an AutoSignature with your message.

- |     |  |   |
|-----|--|---|
| 1.  | Position the insertion point at the end of your message, and then press <b>ENTER</b>       |   |
| 2.  | Type your first name   |   |
| 3.  | Format your name in the font of your choice  |   |
| 4.  | If necessary, select your name   |   |
| 5.  | Click the Signature Button in the Include grouping on the Message tab and click signatures | <i>Make sure you are on the Message tab</i>       |
| 6.  | Click signatures   | <i>The AutoSignature dialog box is displayed.</i> |
| 7.  | <i>In the AutoSignature dialog box type a name for the signature.</i>                      |   |
| 8.  | Choose whether to make it the default signature  |   |
| 9.  | Choose OK  | <i>The AutoSignature dialog box closes.</i>       |
| 10. | Choose OK  | <i>The Options dialog box closes</i>              |
| 11. | Click anywhere in the message  | <i>The AutoSignature is deselected.</i>           |

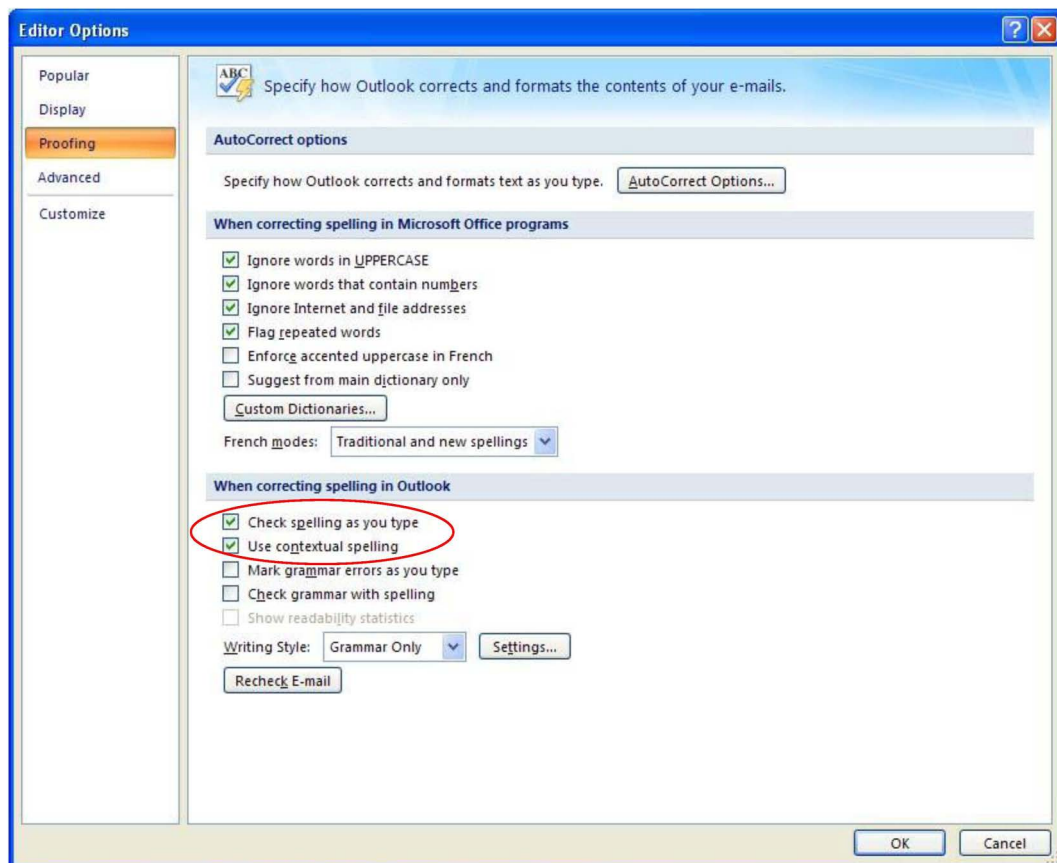
## Correcting Spelling as You Type

As you type your message, your spelling errors appear underlined with a wavy red line. You can correct them as you type or wait until you send your message to correct them.

### Method

To correct spelling as you type:

1. When a wavy red line appears below a word, examine the word and, if necessary, retype it correctly.  
or
1. When a wavy red line appears below a word, right-click the word.
2. From the shortcut menu, choose the correct word.



## Exercise

In the following exercise, you will check spelling as you type.

- Position the insertion point at the end of the first paragraph, press **ENTER** twice, and then type the following text, including the errors:

**The followingis a preposed itinerary.  
If you have any concirns, please let me know!**

*A wavy red line appears below **followingis**, below **preposed**, and below **concirns**.*
- Place the insertion point after the *g* in *followingis* and press **SPACEBAR**

*The spelling is corrected, and the wavy red line disappears.*
- Right-click the word *preposed*

*A shortcut menu appears with two suggested replacement words.*
- Choose *proposed*

*The spelling is corrected and the wavy red line disappears. One spelling error remains.*

## Sending a Message

When you have finished typing the message, click the Send button on the toolbar. When you click the Send button, Outlook places your message in the Outbox. At regular intervals, the network checks your Outbox and sends the messages it contains. You can then find your message in the Sent Items folder.

You can set an option from the Tools menu to run a final spelling check when you send your message. If you set this option, then, when you send your message, if you still have a misspelled word, the Spelling dialog box, shown in Figure 2-8, appears, and it shows you your errors.



Figure 2-8: The Spelling Dialog Box

### Method

To send a message:

1. In the New Message window, on the toolbar, click the Send button.
  2. If necessary, in the Spelling dialog box, in the Not in dictionary area, examine the word that appears in the red font.
  3. If the word is spelled correctly, choose Ignore or Ignore All to accept the word for this message only or choose Add to add the word to your custom dictionary.
- or

4. If the word is spelled incorrectly, in the Suggestions area, select the correctly spelled word, if available, or correct the spelling in the Not in dictionary area.
5. Choose Change or Change All to correct the spelling for this message.
- 6) Repeat steps 2 through 4 as necessary.

### Exercise

In the following exercise, you will send a message.

1. Make sure the message is still open
2. On the toolbar, click the Send button
3. Choose Change
4. If your name appears, choose Add
5. If necessary, correct spelling errors you made while entering the message text

*The Spelling dialog box appears. The Not in dictionary area displays the word **concerns** in red. The Suggestions area suggests the word with the correct spelling.*

*The spelling error is corrected.*

*Your name is added to the Custom Dictionary.*

*The message is sent.*



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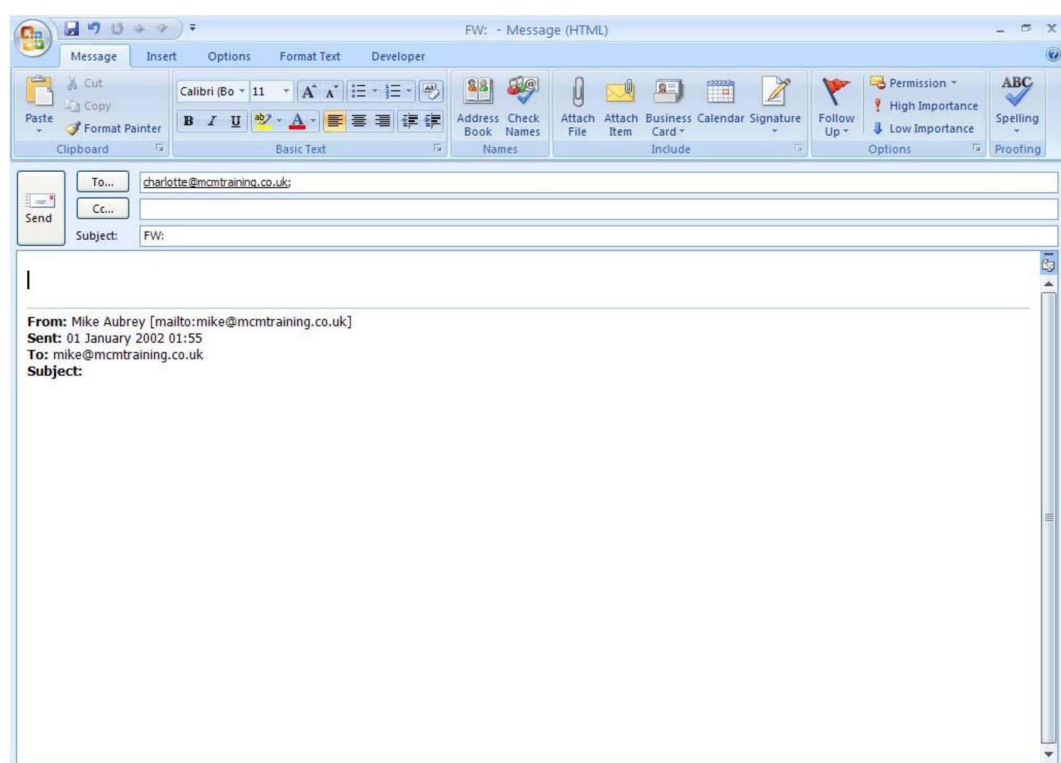
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## Forwarding and Replying to Messages

Outlook lets you forward and reply to messages that you receive. If you want to forward a message to someone who did not receive the original, use the Forward button on the toolbar. The Reply to Sender button lets you respond to the originator of the message, while the Reply to All buttons lets you respond to all the individuals who received the message.

### Forwarding a Message

When you open a message and then click the Forward button, a New Message window opens containing the message you want to forward, as shown in Figure 2-9. The title bar shows an envelope icon followed by the letters FW: and then displays the subject of the original message. After you address the message, you can add a comment at the top of the message area and then send it.



**Figure 2-9:** The New Message Window When You Forward a Message

### Method

To forward a message:

1. Open the original message.
- or
2. In the message list, select the message.
3. On the toolbar, click the Forward button.
4. Address the message.

5. If desired, at the top of the message area, type comments.
6. Send the message.

## Exercise

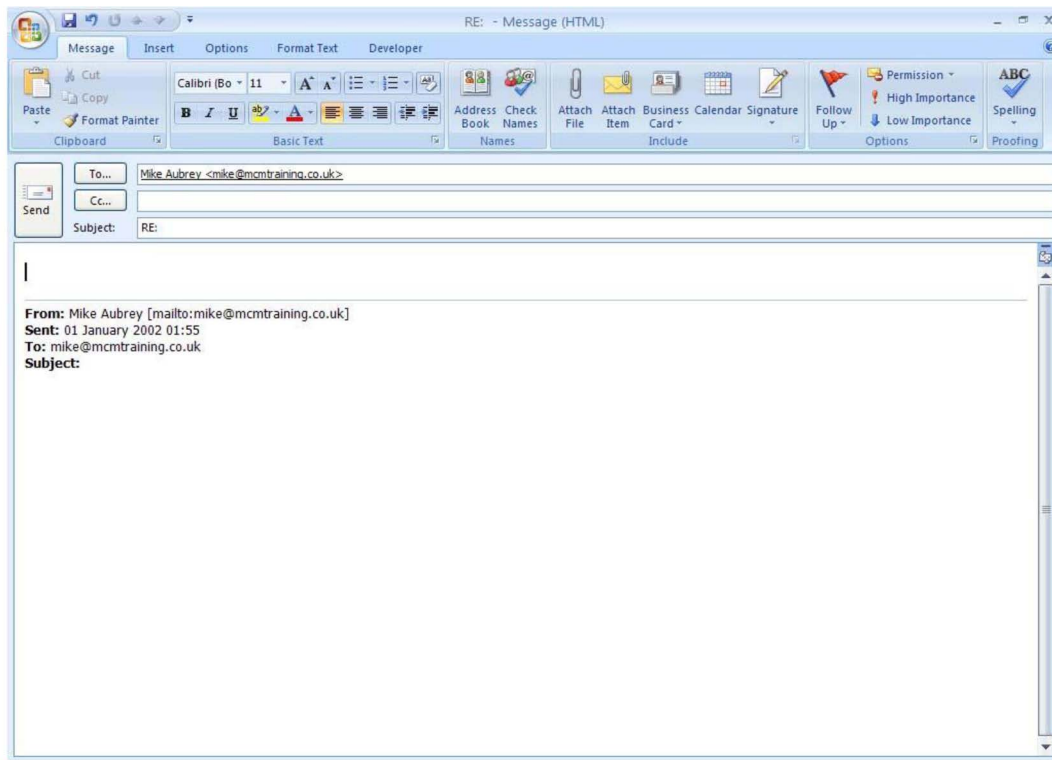
In the following exercise, you will forward a message.

1. Click the Inbox shortcut in the folder list
2. If necessary, check for new messages
3. In the message list, double-click the message your mail partner just sent you *The message opens.*
4. On the toolbar, click the Forward button *The message appears in the New Message window.*
5. Follow your instructor's directions to address the message to another member of your class
6. At the top of the message area, type  
**Look! [Your partner's name] has Outlook!**
7. Send the message
8. If necessary, close the original message

## Replying to a Message

When you reply to a message, you can reply to the originator only or you can reply to the originator and to everyone else who received the message. Click the Reply to Sender button to respond to the originator, or click the Reply to All buttons to respond to the originator and to everyone else who received the message. Figure 2-10 shows the New Message window when you reply to a message.

When you click a Reply button, a New Message window opens, just as it does when you are forwarding a message. In this case, however, the To text box is filled in for you with the original sender's address or the sender and all the recipients' addresses, and the insertion point is automatically positioned at the top of the message area.



**Figure 2-10:** The New Message Window When You Reply to a Message



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## Method

To reply to a message:

1. Open the original message.  
or
1. In the message list, select the message.
2. On the toolbar, click the Reply button.  
or
3. On the toolbar, click the Reply to All buttons.
4. At the top of the message area, type your response.
5. Send the reply.

## Exercise

In the following exercise, you will reply to a message.

1. In the message list, open the message from your mail partner
2. On the toolbar, click the Reply button  
*The message appears in the New Message window with the original sender's name filled in and the insertion point positioned at the top of the original message area.*
3. Type the message.
4. Send the reply
5. If necessary, close the original message

## Managing Messages Using Folders

When your messages arrive, Outlook stores them in the Inbox. As messages accumulate, your Inbox can become a confusing jumble. To help you sort things out, you can create folders for orderly message storage.

After you've read a message, you can move it to a folder for storage or, if you don't need it anymore, you can delete it. Deleting messages saves you space on your hard drive.

You can manage your messages, and you can also manage data in other Outlook folders. The folder list displays a folder tree that looks like a folder tree you might see in Explorer and in My Computer. The Outlook folder list displays only the Outlook folders, as shown in Figure 2-11. When the folder list is collapsed, you see only the main folders. When the folder list is expanded, you see the subfolders, too. In the folder list, you can create new folders, move data from folder to folder, and delete and recover data.

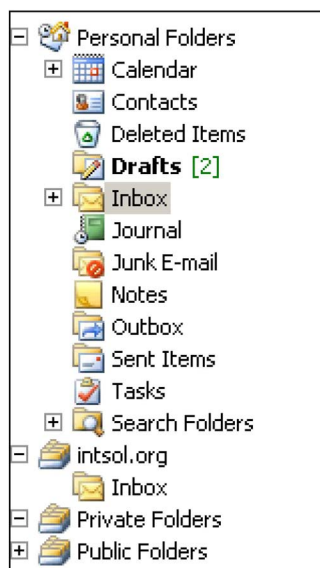


Figure 2-11: A Collapsed Folder List

### Creating a Folder

As you collect more and more data, you might want to make additional folders in which to keep your records more neatly. For example, you might want to store messages related to one project in one folder and messages related to another project in another folder. And once you get on e-mail mailing lists, you can certainly use additional file folders in which to sort the mail you received and want to keep. To keep organized, you can create a new folder in the Create New Folder dialog box, shown in Figure 2-12.



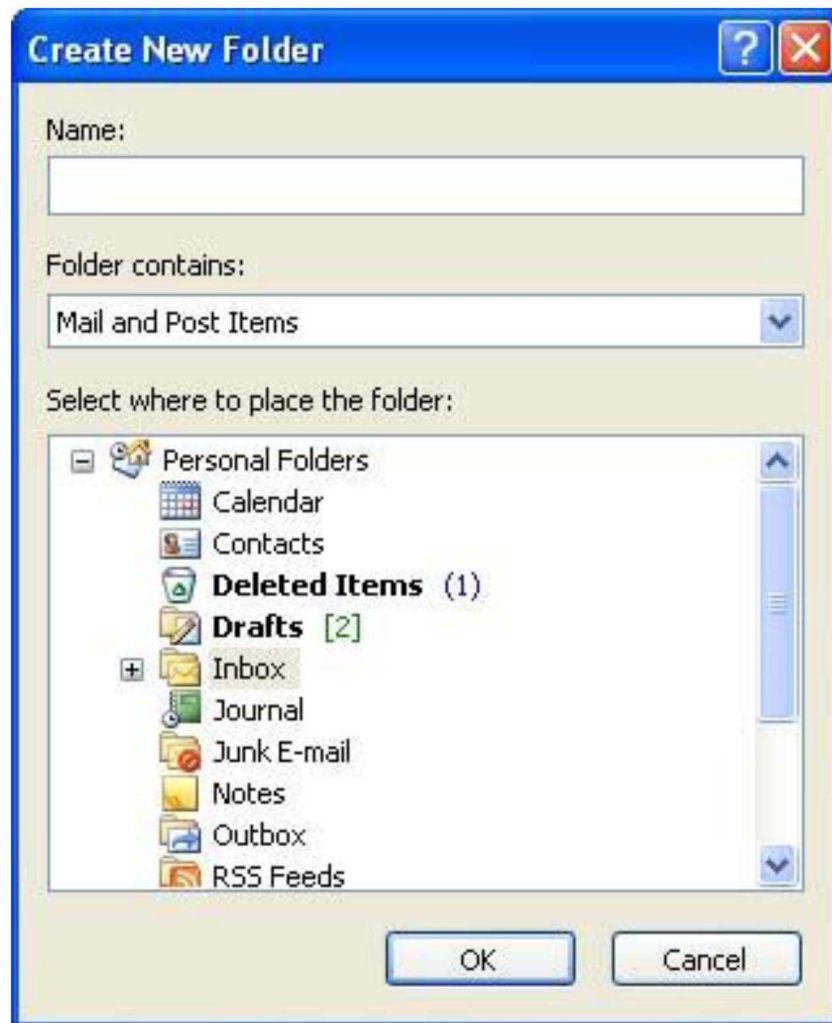
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**Figure 2-12:** The Create New Folder Dialog Box

## Method

To create a folder:

1. Select the folder to which you want to add a subfolder.
2. From the File menu, choose New, and from the New submenu, choose Folder.
3. In the Create New Folder dialog box, in the Name text box, type the name for the new subfolder.
4. Choose OK.

## Exercise

In the following exercise, you will create new folders for your Inbox.

- |     |  |   |
|-----|--|---|
| 1.  | On the toolbar, click the Folder List button | <i>The folder list appears.</i>   |
| 2.  | Select the Inbox                             | <i>The message list appears.</i>  |
| 3.  | From the File menu, choose New               | <i>The New submenu appears.</i>   |
| 4.  | Choose Folder                                | <i>The Create New Folder dialog box appears.</i>  |
| 5.  | In the Name text box, type <b>Mail</b>       |   |
| 6.  | Choose OK                                    | <i>The new folder appears in the folder list as a subfolder of the Inbox folder. The Inbox is selected.</i> |
| 7.  | From the File menu, choose New               | <i>The New submenu appears.</i>   |
| 8.  | Choose Folder                                | <i>The Create New Folder dialog box appears.</i>  |
| 9.  | In the Name text box, type <b>Class</b>      |   |
| 10. | Choose OK                                    | <i>The second new subfolder appears in the folder list.</i>   |

## Moving a Message to a Folder

Creating a folder hierarchy is helpful only if you use it to organize your messages. You should move a message from the Inbox to a long-term folder as soon as you read it and decide to keep it.

After you create new subfolders, you can move the messages you have stored in the Inbox folder to the subfolders you created. You can also move messages from one subfolder to another.

When you display the folder list, you can drag a message from one folder to another. You can also use the Move to Folder button on the toolbar to move files from one folder to another.



The Move to Folder button displays a menu listing folders to which you have moved messages and also lets you access the Move Items dialog box. The Move Items dialog box, shown in Figure 2-13, lets you select any folder into which to move the selected file.

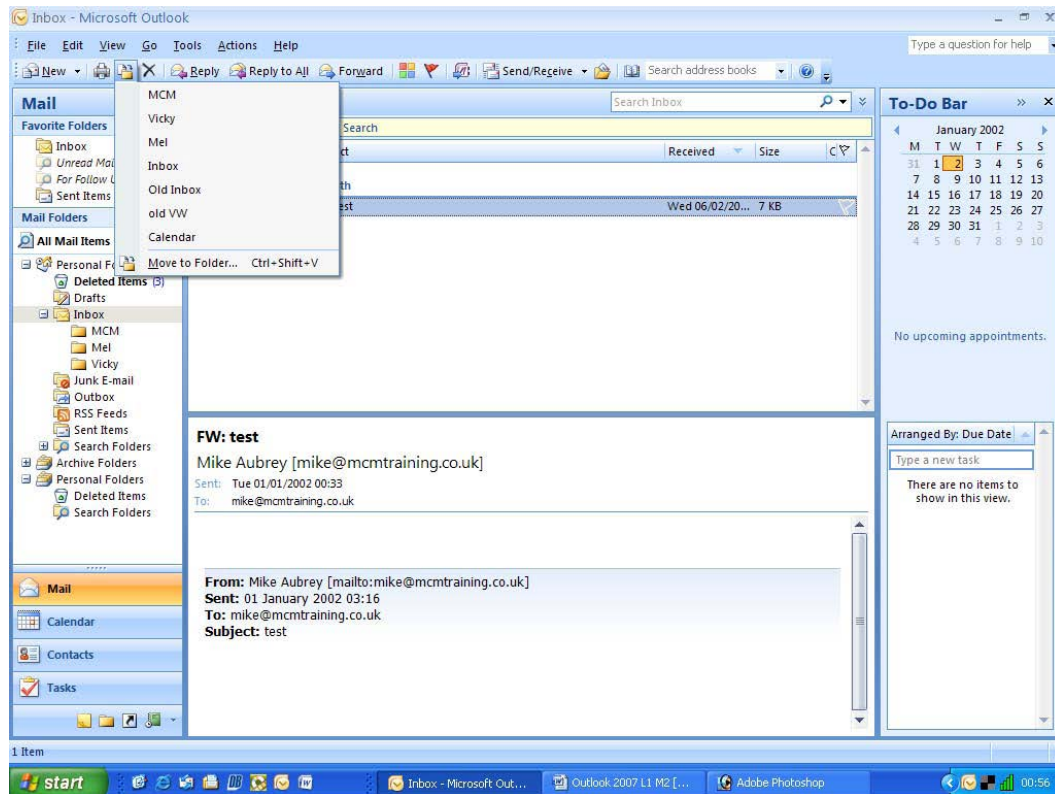


Figure 2-13: The Move to Folder Box

## Method

To move a message to a folder:

### Drag method

1. Display the folder list and expand it as necessary.
2. Drag the message to the appropriate folder.

### Toolbar method


1. Select the message you want to move.
  2. On the toolbar, click the Move to Folder button.
  3. From the menu, choose the appropriate folder.
- or
4. From the menu, choose Move to Folder.
  5. In the Move Items dialog box, expand the folder list as necessary, and then select the appropriate folder.
  6. Choose OK.

## Exercise

In the following exercise, you will move messages to a folder.

- |    |  |   |
|----|--|---|
| 1. | From the message list, drag the message from your partner to the <b>Class</b> folder | <i>The message is moved and disappears from the Inbox message list.</i>           |
| 2. | Select the Outlook message   |   |
| 3. | On the toolbar, click the Move to Folder button                                      | <i>A menu appears.</i>  |
| 4. | Choose Move to Folder  | <i>The Move Items dialog box appears.</i>   |
| 5. | Make sure the <b>Class</b> folder is selected, and then choose OK                    | <i>The message is moved and disappears from the Inbox message list.</i>           |
| 6. | In the folder list, select the <b>Class</b> folder                                   | <i>Your partner's message and the Outlook message appear in the message list.</i> |

## Deleting and Restoring a Message

A cluttered Inbox makes it difficult to locate specific messages. You should delete messages you don't want to keep. You might want to review the messages in all folders periodically and delete messages that are no longer relevant. If you have a message you no longer want, you can delete it using the Delete button on the toolbar .



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Deleted items go to the Deleted Items folder. If you want to recover an item from the Deleted Items folder, you can easily select and restore it. But once you delete items from the Deleted Items folder, Outlook removes them completely from your computer. They do not go to the Recycle Bin and are no longer retrievable.

If you receive a notice that your hard drive or your network drive is running out of space, you should check your Deleted Items folder for items that you can permanently delete.

## Method

To delete an item and hold it:

1. Select the item you want to delete.
2. On the toolbar, click the Delete button.

To restore deleted items:

1. Open the Deleted Items folder.
2. Select the item(s) you want to restore.
3. On the toolbar, click the Move to Folder button.
4. From the menu, if the folder is listed, choose the folder.  
or
5. From the menu, if the folder is not listed, choose Move to Folder.
6. If necessary, in the Move Items dialog box, in the *Move the selected items to the folder:* list, select the folder and then choose OK.

To permanently delete items:

1. Open the Deleted Items folder.
2. Select the item(s) you want to delete permanently.
3. On the toolbar, click the Delete button.
4. In the Office Assistant balloon or the message box, choose Yes.



## Exercise

In the following exercise, you will delete and restore items.

- |     |   |   |
|-----|---|---|
| 1.  | Make sure the <b>Class</b> folder is open       |   |
| 2.  | Select the <b>Outlook</b> message               |   |
| 3.  | On the toolbar, click the Delete button         | <i>The message is deleted.</i>  |
| 4.  | Open the Deleted Items folder                   | <i>The message appears in the list.</i>   |
| 5.  | Select the <b>Outlook</b> message               |   |
| 6.  | On the toolbar, click the Move to Folder button | <i>The menu appears.</i>  |
| 7.  | Choose Class                                    | <i>The message is moved to the <b>Class</b> folder and disappears from the Deleted Items list.</i>                    |
| 8.  | Open the <b>Class</b> folder                    | <i>The message is restored.</i>   |
| 9.  | Open the Sent Items folder                      | <i>The message list appears.</i>  |
| 10. | Delete the message to Linda Elengold            |   |
| 11. | Open the Deleted Items folder                   | <i>The deleted message appears in the list.</i>   |
| 12. | Select the message                              |   |
| 13. | On the toolbar, click the Delete button         | <i>A message box that asks <b>Are you sure that you want to permanently delete the selected item(s)?</b> appears.</i> |
| 14. | Choose Yes                                      | <i>The message is permanently deleted.</i>  |
| 15. | On the toolbar, click the Folder List button    | <i>The folder list closes.</i>  |

## Assignment

1. Address a new message to your class partner with the subject **Food Drive**.
2. In the message area, type the following text (include the misspellings). Use the AutoComplete tip.

**Dear Sir or Madam:**

**Next week we're holding our anual food drive for the Orleans Parish Food Bank. We need non-perishible food items. Please bring your foodto my restaurant.**

3. In the second sentence, insert the words **canned food and other** before the word *non-perishable*.
4. In the third sentence (*Please bring...*), add a space between *donations* and *to*. Then replace the word *food* with **donations**.
5. Change the formatting of the *Orleans Parish Food Bank* to 14 point italic. Align the message to the right. Then realign the message to the left.
6. Delete your AutoSignature, and then create a new AutoSignature using your full name.
7. Correct the spelling and send the message.

8. Check for a new message from your mail partner. Preview and then read the message. Print the message. Move the message to the **Restaurant mail** folder.
9. Open the **Kerry Owen Farewell** message.
10. Forward the message to your class partner, typing the following comment at the top of the message area:  
**Would you like to bring something?**
11. In the Inbox, move the **Kerry Owen** message to the **Restaurant mail** folder.
12. Open the **Vendor Meeting** message.
13. Reply to the sender with the following comment added at the top of the message area: **I would like to attend.**
14. In the Sent Items folder, create a **Business Mail** subfolder and a **Personal Mail** subfolder.
15. File the Joan Berry and the Anna Marble sent items in the **Business Mail** subfolder. File the Susan Crawford sent item in the **Personal Mail** subfolder.
16. Delete the Susan Crawford Sent Item from the Sent Items **Personal Mail** subfolder and then restore it to the same folder.
17. Permanently delete the **Vendor Meeting** message.
18. Close the folder list.



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# Section 3 Organising Contacts

## Objectives

At the completion of this lesson you will be able to:

- Create a Contact List
- Manage Contacts

## Topics

Creating a Contact List

Adding Contacts Manually

Selecting and Editing an Address Card

Transmitting and Adding Contacts with E-mail

Managing Contacts

Changing the Current View

Assignment

## Creating a Contact List

When you open the Contacts folder, Outlook displays the *contact list*, illustrated in Figure 3-1, in the information viewer. The contact list contains names, phone numbers, and other important information about your business and personal associates. With a contact list, you can store, update, organise, and retrieve your colleagues' contact information. If you forget a contact's name, you can look that person up another way, such as by workplace or by any other field listed in the contact information.

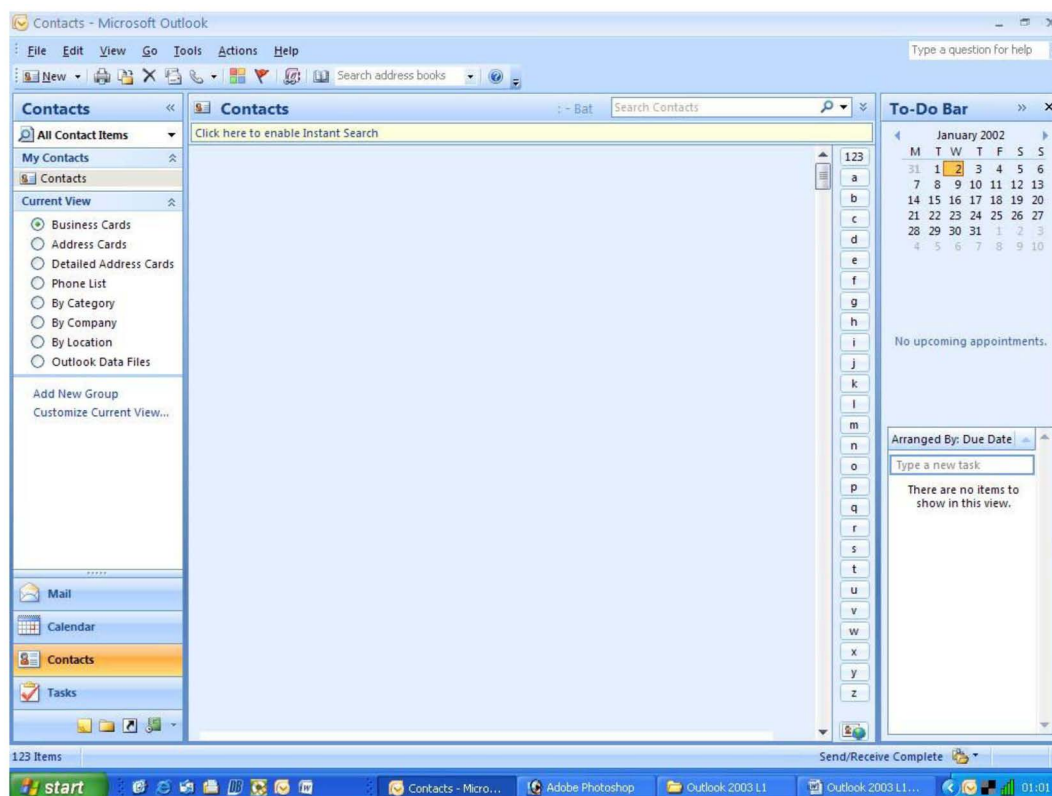


Figure 3-4: The Contact List Screen



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If you have more contacts stored in your folder than you can display at one time in the information viewer, you can click one of the alphanumeric tabs at the right of the screen to display the contact you want.

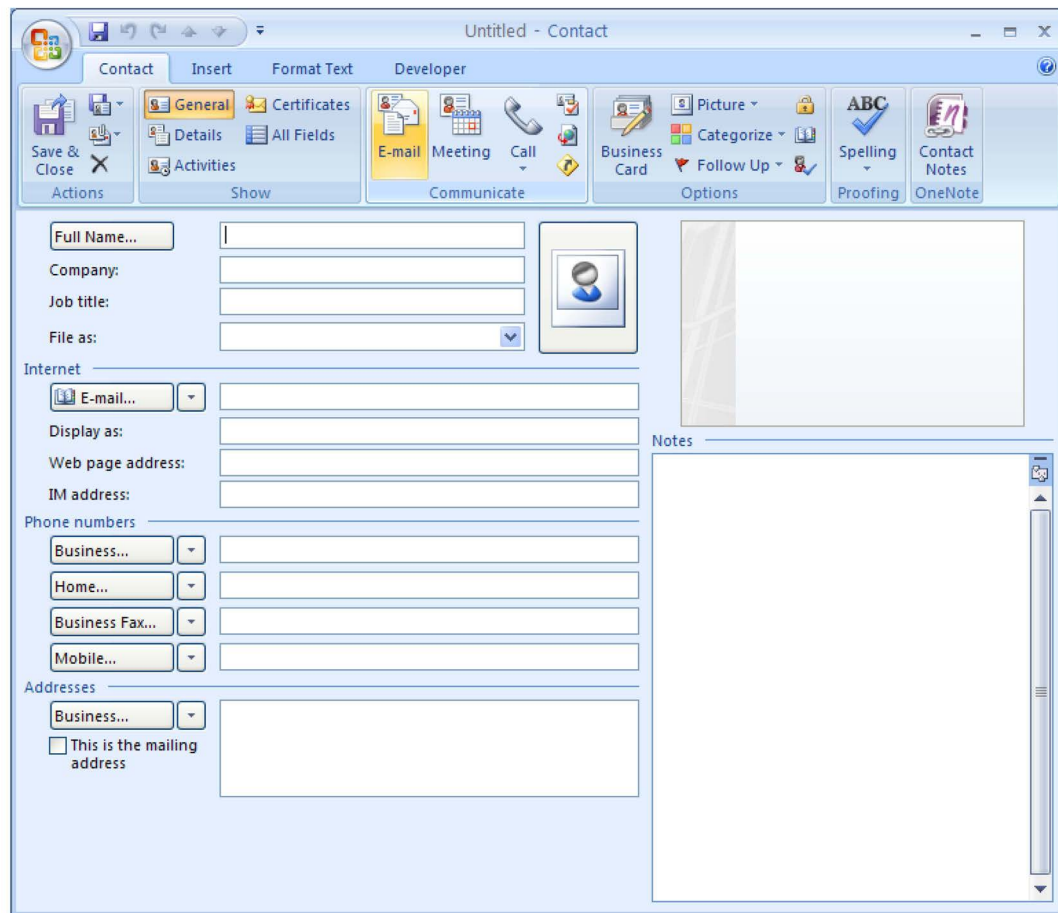
As in other Outlook folders, there are context-sensitive buttons on the toolbar that are available only in the Contacts folder. Table 3-7 describes the functions of these toolbar buttons.

| Button  | Name                   | Function   |
|---|------------------------|--|
|    | New Contact            | Opens the New Contact window so that you can add a new contact address card. The drop-down arrow gives you access to the New windows for the other Outlook features. |
|    | Print                  | Prints your contacts list  |
|    | Move To Folder         | Moves your contacts to another folder  |
|    | Delete                 | Deletes a contact  |
|    | New Message to Contact | Opens a New Message window addressed to the selected contact.  |
|   | Dial                   | If connected, places a call to your contact. The drop-down arrow displays the selected contact's phone numbers and gives you dialling options.                       |
|  | Categorize             | Organises your contacts into colour coded categories   |
|  | Follow Up              | Allows you to flag a contact for follow up   |

**Table 3-7:** The Contacts Toolbar Buttons

## Adding Contacts Manually

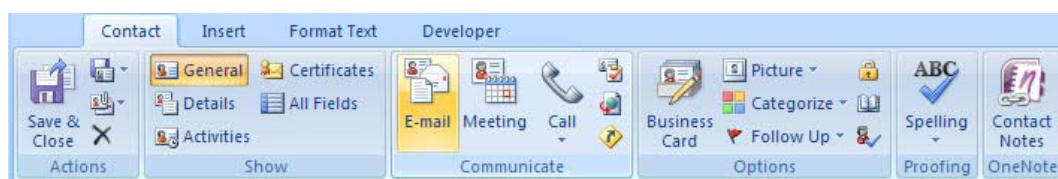
At the very least, your contact list should include names and phone numbers, but the more inclusive you make your list, the more helpful it can be to you. To add contacts, type your data into the New Contact window, illustrated in Figure 3-2, selecting fields as appropriate to enter additional details.



**Figure 3-5:** The New Contact Window

When you enter all the information in the New Contact window and save it, Outlook stores each contact in the contact list as an *address card*. Address cards in the contact list simulate business cards in your rotary or card file.

The Contact window has a ribbon of its own with four tabs containing the various commands Figure 3-3.



**Figure 3-3:** The Contact Window Ribbon

## Method

To add contacts manually:

1. Open the Contacts folder.
2. On the toolbar, click the New Contact button.

3. In the New Contact window, for all pages, fill in the text boxes, select the check boxes, and so forth, as appropriate.
4. On the toolbar, click the Save and Close button.  
or
5. On the toolbar, click the Save and New button to add another contact.

## Exercise

In the following exercise, you will add contacts to your contact list manually.

- |     |  |   |
|-----|--|---|
| 1.  | Using the shortcut bar open the Contacts folder  | <i>The contact list appears in Address Cards view.</i>                    |
| 2.  | On the toolbar, click the New Contact button   | <i>The New Contact window appears.</i>                                    |
| 3.  | In the Full Name text box, type <b>Jeff Thompson</b>   |   |
| 4.  | In the Job title text box, type <b>Marketing Rep</b>   |   |
| 5.  | In the Company text box, type <b>ACME Wholesale</b>  |   |
| 6.  | In the Address text box, type <b>222 Whooping Crane Hwy<br/>New Orleans, LA 70110</b>  |   |
| 7.  | Make sure the <i>This is the mailing address</i> check box is selected   |   |
| 8.  | In the Phone: Business text box, type <b>504-555-1612</b>  |   |
| 9.  | In the E-mail text box, type <b>jthompso@acmewhol.com</b>  |   |
| 10. | On the toolbar, click the Save and Close button  | <i>The contact list reappears.</i>  |
| 11. | At the right of the screen, click the <i>t</i> alphanumeric button   | <i>The <b>Jeff Thompson</b> address card appears in the contact list.</i> |
| 12. | Using the information shown in Table 3-3 as a guide, enter the first contact into your contact list  |   |
| 13. | With your mail partner, select one of the remaining contacts for you to enter into your contact list and the other for your partner to enter, and then add the entry |   |



| Full Name    | Job Title     | Company              | Business Address                    | City    | County | Post code  | Business Phone number |
|--------------|---------------|----------------------|-------------------------------------|---------|--------|------------|-----------------------|
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| Lucy Walsh   | Consultant    | Kirk & Associates    | 33 Brentwood Park Close,<br>Clapham | London  | London | 21044-0928 | 020 8742 3695         |
| Judy Kenning | Friend        | JK Computer Services | 14 Royal Crescent                   | Swindon | Wilts. | SN3 5RT    | 01273 569369          |

Table 3-8: Contact List Information

## Selecting and Editing an Address Card

Your contacts might change jobs, get new phone numbers, or give you additional information that you want to store in your contact list. You can edit information in your contact list directly on the address card or in the Contact window.



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## Method

To select an address card:

1. Click the desired card.

To edit an address card:

1. Select the address card.
2. On the address card, type the changes.  
or
3. Double-click the address card.
4. In the Contact window, type the changes.
5. On the toolbar, click the Save and Close button.

## Exercise

In the following exercise, you will edit address cards in your contact list.


- |    |  |   |
|----|--|---|
| 1. | Make sure the Jeff Thompson address card is selected   | <i>The address card is selected.</i>  |
| 2. | Click between the <i>H</i> and the <i>w</i> in <i>Hwy</i> in the business address              | <i>The insertion point appears between the <b>H</b> and the <b>w</b> in <b>Hwy</b>.</i> |
| 3. | Press <b>Backspace</b> and then type <b>Pk</b>   | <i>The business address is now <b>222 Whooping Crane Pkwy</b>.</i>                      |
| 4. | Select the Beth Wright address card, and then double-click it                                  | <i>The Beth Wright Contact window appears.</i>  |
| 5. | In the large text box at the bottom of the window, type <b>Beth markets herbs and spices</b> . |   |
| 6. | On the toolbar, click the Save and Close button  | <i>The Contact window closes and the changes are saved.</i>                             |

## Transmitting and Adding Contacts with E-mail

If colleagues have someone listed in their contact lists who you would like to include in your list, too, your colleagues can e-mail the address card directly to you, just as you can e-mail similar cards to your colleagues. Then you can open the e-mail message and transfer the address card directly to your Contacts folder. Neither of you has to retype the information.

## Method

To transmit contacts via e-mail:

1. Select the contact.
2. From the Contacts tab on the ribbon, click the send button .
3. From the drop down menu click 'send as business card'
4. In the New Message window, address and send the message.

To add contacts from e-mail:

1. Open the message with the address card.
2. Click the address card icon attachment.
3. On the contact screen click Save and Close.
4. Open the Contacts folder to check the contact has been added successfully.

## Exercise

In the following exercise, you will transmit and add contacts to your contact list with e-mail.

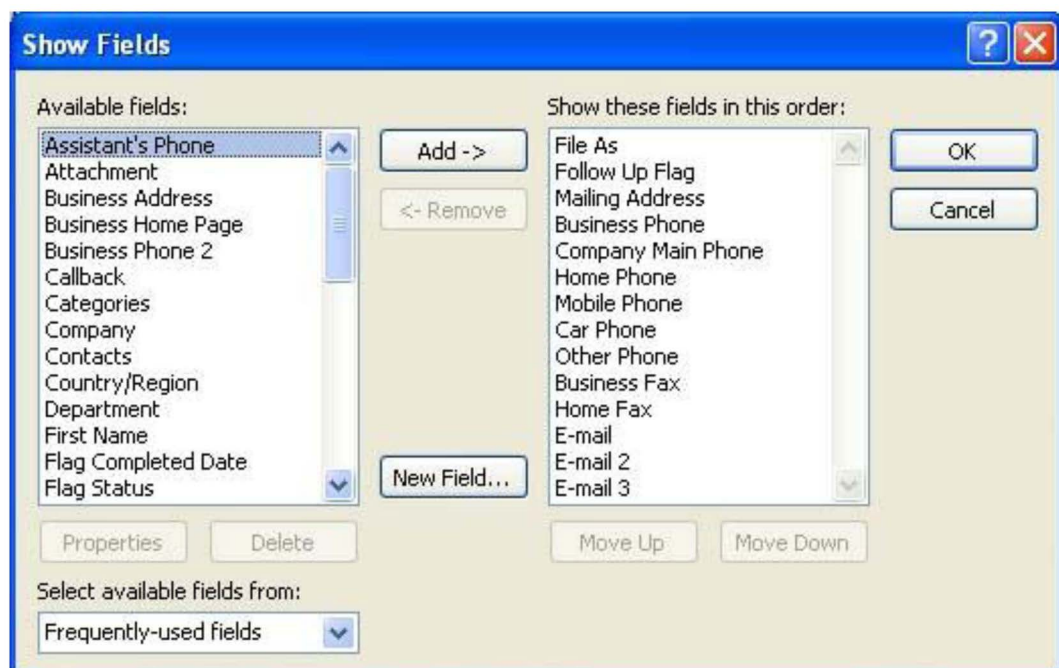
1. Make sure your contact list is open
2. Select the contact you created (and your mail partner did not create)
3. From the Contacts menu, choose Forward *The New Message window appears with the address card as an icon in the message area.*
4. Address the new message to your partner, and then send it
5. Check for new mail, and then open your partner's message
6. On your partner's message, click the address card icon *The address card is selected.*
7. In the Message window, from the Edit menu, choose Copy *The address card is copied to the Clipboard.*
8. Resize and reposition the Message window so you can see the Outlook bar
9. Open the Contacts folder
10. In the Contacts folder, from the Edit menu, choose Paste *The address card is added to your contact list.*
11. On the taskbar, click the Message button to restore the Message window
12. Close the Message window

## Managing Contacts

Besides organizing your contact list alphabetically by contact name, Outlook lets you view it by company name, location, and category. For example, if you cannot remember the name of a contact but do remember that person's workplace, you can view your contact list by company to find the contact. You can choose which fields you display and which you hide.

### Showing and Hiding Fields

In the Contacts folder, you can view your contacts by address cards, phone list, category, company, or location. In addition, with the Show Fields dialog box, shown in Figure 3-4, you can change the fields that appear on the address cards.



**Figure 3-4:** The Show Fields Dialog Box

### Method

To show and hide fields:

1. From the View menu (in the Contacts window), choose current view and select address cards, Customize Current View. Then click the **Fields** button.
2. In the Show Fields dialog box, in the Available fields' list box, select the field(s) you want to add to the view pane, and then choose Add.  
or
3. In the Show fields dialog box, in the *Show these fields in this order:* list box, select the field(s) you want to remove from the view pane, and then choose Remove.
4. If desired, choose New Field, and then create a new field.
5. If desired, in the *Show these fields in this order:* list, select a field and choose Move up or Move down.
6. Repeat step 4 as necessary to list the fields in the order you want them.

7. Choose OK.

### Exercise

In the following exercise, you will show and hide fields.

1. From the View menu (in the Contacts window), choose current view and select address cards, Customize Current View. Then click the **Fields** button.
2. In the Available fields list box, select Business Home Page
3. Choose Add
4. In the *Show these fields in this order:* list box, select Business Fax
5. Choose Move Up repeatedly until Business Fax is below Company Main Phone in the list
6. Choose OK
7. Choose OK

*The Show Fields dialog box appears.*

*Business Home Page appears at the bottom in the **Show these fields in this order:** list box*

*The Show Fields dialog box closes.*

*The address cards show the Business Fax number on each card for which such a number is available.*



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## Changing the Current View

Besides viewing address cards with one mailing address and a business and home phone number, you can change the Current View to display detailed address cards or a phone list that displays a contact with phone numbers but not addresses. You can group your contact list by company to find contacts whose name you forget.

When you change the Current View, you are applying a built-in filter. Table 3-4 summarises the Contacts Current View filters.

| Name                   | Function  |
|------------------------|---|
| Business Cards         | Shows simple business card view   |
| Address Cards          | Shows simple address cards for all contacts in the folder.  |
| Detailed Address Cards | Shows detailed address cards for all contacts in the folder.  |
| Phone List             | Lists all contacts. You can sort the contacts by first or last name, company, and so forth.                                 |
| By Category            | Groups contacts by category.  |
| By Company             | Groups contacts by company.   |
| By Location            | Lists all contacts. You can sort the contacts by state and country as well as by first or last name, company, and so forth. |

**Table 3-9:** The Contacts Current View Filters

### Method

To change the Current View:

#### Menu method

1. From the View menu, choose Arrange By then select Current View.
2. From the Current View submenu, choose the desired view.

#### Toolbar method

1. Click the Current View drop-down list arrow.
2. From the drop-down list, select the view.
3. If necessary, in the Save View Settings message box, select the *Update the view “...” with the current View settings* option button.
4. Choose OK.

### Exercise

In the following exercise, you will change the Current View of your contact list.

- |    |  |   |
|----|--|---|
| 1. | Click the Current View drop-down list arrow  | <i>The drop-down list appears.</i>                      |
| 2. | Select Detailed Address Cards  | <i>The Save View Settings message box might appear.</i> |
| 3. | If necessary, select the <i>Update the view "Address Cards" with the current view settings</i> option button |   |
| 4. | Choose OK  | <i>The address cards show more details.</i>             |
| 5. | Change the Current View to By Company  | <i>The contacts are grouped by company.</i>             |
| 6. | If necessary, expand the list to show employees of Kirk & Associates   | <i>Two names appear.</i>                                |

## Assignment

1. Add one of the following contacts to your contact list and arrange with your e-mail partner for your partner to add the other contact:  
 Dr. Kevin Tucker, Harley Street Clinic, 11 Harley Street, London, W1A 3RD , 020 7414 8888, 020 7414 5398  
  
 Charles Simon, Presto Pasta, 42 James Street, London, SW1 5SA, 020 7423 9671, 020 7423 9612.
2. Send the contact you added in step 1 above to your e-mail partner.
3. Add the contact your e-mail partner sent you to your contact list.
4. Edit the business address of the **Geoff Herbert** contact to read **Redland Drive**.
5. Remove the field **Business Home Page** from the fields you display on your address cards. In the Show Fields dialog box, in the *Show these fields in this order:* list box, move Business Fax down three places.
6. Change your contact list Current View to Address Cards.



To see Section 4-6 download  
**Outlook 2007: Part II**