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HOW TO DO
EVERYTHING
WITH
MICROSOFT
OFFICE
OUTLOOK
2007

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Everything
with

Microsoft® Office
Outlook® 2007

Manage and
organize your
e-mail and
contacts

Block junk mail
and spam from
your inbox

Keep track of
events, tasks, and
appointments

ALL-NEW
FOR THE
LATEST
RELEASE

Bill Mann

How to Do Everything with

Everything

with

Microsoft Office Outlook 2007

What You'll Do in This Book

How to Do *Everything* with

Microsoft® Office Outlook® 2007

About the Author

Bill Mann is the author of more than a dozen books on personal technology, along with numerous articles for various technology magazines, including *Computing Unplugged*, where he is a contributing editor. In addition to his writing, Bill develops and leads online courses on Outlook 2003 and Outlook 2007. During the day, Bill works as an engineering manager at the fastest growing private company in New Hampshire. When not working, he spends his time with his daughter or his friends.

About the Technical Editor

Will Kelly is a freelance technical writer and consultant living and working in the Washington, DC area. He was the technical editor of over 30 computer books about web development and Microsoft Office products between 1994 and 2004. This is his second project with Bill Mann. His articles about Small to Medium Enterprise and mobile computing topics appear regularly in *Processor Magazine* and *PC Today Magazine*. He rarely misses spinning class and the gym (even on the night before a deadline).

How to Do Everything with

Microsoft® Office Outlook® 2007

Bill Mann
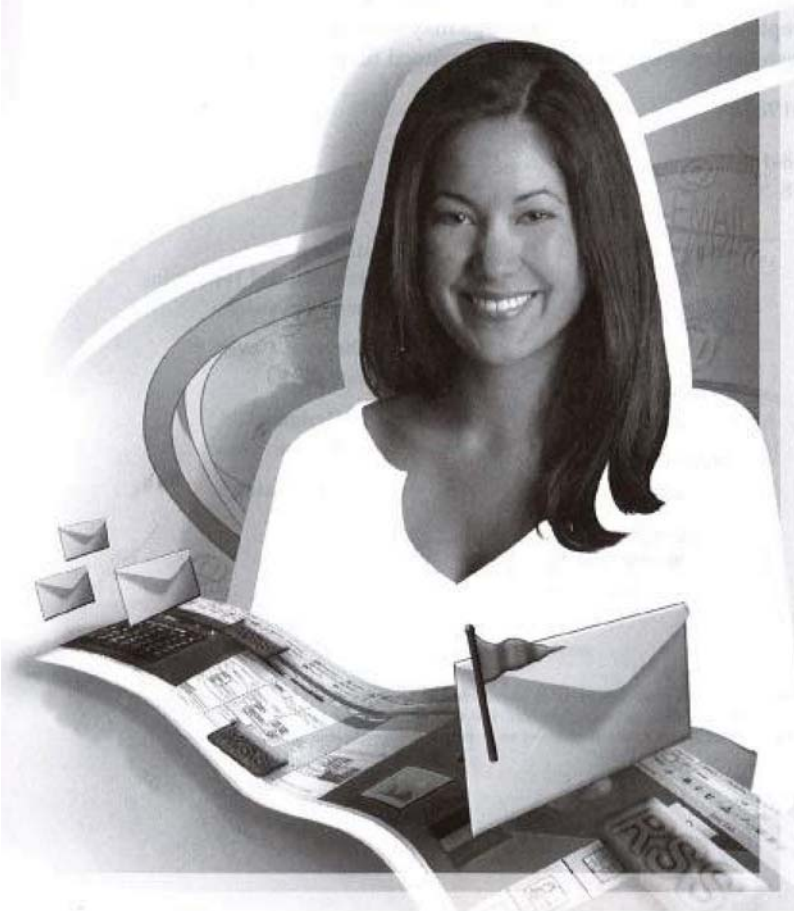
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How to Do Everything with Microsoft® Office Outlook® 2007

LC Control Number

2007   277217

This book is dedicated to Jenn,
who is growing up to be someone very special.

Contents at a Glance

Contents

Acknowledgments

My thanks go out to the team at McGraw-Hill/Osborne who were always pleasant, helpful, and supportive through this crazy, crazy project. Megg, it has been a pleasure to work with you on every project we've done together.

Will, as always, you go above and beyond the call of tech-editing duty. Your insights and feedback from a very different part of the real world have made this a stronger book.

Arushi and Bart, you've been great.

Last but not least, a heartfelt thank you to my agent Margot, who does the deals and handles all the other stuff so I can concentrate on my writing.

Introduction

It seems that every new version of Microsoft Office brings significant changes to Microsoft Outlook. The pattern holds with the 2007 Microsoft Office system. Outlook 2007, officially Microsoft Office Outlook 2007, is significantly different from its predecessor, Outlook 2003.

Outlook has long been a powerful e-mail program and personal information manager. And Outlook 2007 is even better. Not only does it do even better on the tasks it has always done, it gains several new features and capabilities that make it an ever more valuable tool. Some of the big changes in Outlook 2007 include:

- The Ribbon, a replacement for menus and toolbars in windows and views where you are likely to create, read, or edit a lot of text.

- Instant Search, a web-style search engine that replaces the old Find feature.

- Attachment previewing, which lets you peek inside an attached document without having to fully open it.

- RSS integration. Blogs and newsfeeds are popular new ways to get and share information online, and RSS feeds are one of the main ways you can read them. Outlook 2007 has an RSS feed reader built right into it, allowing you to work with these new tools as if they were mail messages.

- Electronic business cards. Make your contact information stand out by creating an electronic business card that Outlook can display.

Those are just some of the new and changed features of Outlook. Together, all the changes make it easier and faster to work with your e-mail, contacts, calendar, notes, and all the rest of your Outlook data.

This book is meant to be a practical guide to the most commonly used, and most useful features of Outlook. It isn't a comprehensive encyclopedia of all things Outlook—there are 1000+ page books written for people who need that kind of information. *How to Do Everything with Microsoft Office Outlook 2007* is meant for regular folks who need to, or want to use Outlook in their day-to-day life. You'll learn to set up, use, and maintain Outlook 2007. You'll learn one good way to do each thing (there are often several ways) you need to do, and perhaps a keyboard shortcut that will let you do something with a few keystrokes instead of a lot of scrolling and clicking with the mouse.

Perhaps you're wondering what qualifies me to teach you this kind of thing. Well, I've been using Outlook since the beginning, and writing about it for years. I've written several Outlook-related articles over the years, along with *How to Do Everything with Microsoft Office Outlook 2003*, the predecessor to the book you hold in your hands now.

But most important, I've taught 2000+ students about Outlook through my introductory online courses in Outlook 2000, Outlook XP (also known as Outlook 2002), and Outlook 2003. By the time you read this, my Outlook 2007 course could be online as well. These courses have helped busy people like you learn about Outlook online, using course material I created, online testing tools, and online discussion areas where the students can ask me and each other Outlook-related questions.

Through these courses, I've learned a lot about how best to present the material, and which things give users the most problems. I used this information to help me design this book, including the topics and procedures that my students have had the most questions about. I think you'll find that your most common questions are answered between these pages too.

In support of this book and my courses, I've created the Living With Outlook website (www.living-with-outlook.com), where I write about the kinds of Outlook tips and tricks that normally don't make it into a book like this. It's also the place where I can get you the latest news and information about Outlook. In Chapter 5 of this book, you'll learn how to subscribe to an RSS feed by subscribing to the Living With Outlook feed, which will keep you informed whenever I add new information to the site. I think you'll find this a great resource.

Parts of the Book

In Part I, you'll get a more in-depth introduction to Outlook 2007, then set it up and do basic configuration so you can start putting Outlook to work for you.

In Part II, you'll learn how to take advantage of Outlook's communication capabilities. E-mail, RSS feeds, instant messaging integration, even a bit about newsgroups will show you how to get Outlook talking to the rest of the world.

The book's Special Project walks you through the steps needed to connect Outlook 2007 to a Gmail or Hotmail e-mail account.

> **TIP**   *My Living With Outlook website provides information on connecting some other types of e-mail accounts to Outlook, including AOL and Yahoo! Mail.*

In Part III, we shift the focus to managing your personal information. From Outlook's Calendar, Tasks, Notes, and To-Do, to the Shortcuts pane and the Journal, when you finish this part of the book, you'll be able to use them all.

In Part IV, you'll learn about customizing and managing Outlook. You'll learn how to create regular Outlook folders, custom views, and Search Folders, along with how to customize the Outlook user interface to better suit your own working style. And you'll learn about the security features that help to protect Outlook from creeps who want to do it (and thereby you) harm.

In Part V, you'll go even further. You'll literally go further as we talk about ways to mobilize your Outlook data. Then you'll learn about integrating Outlook 2007 with other Office 2007 applications, as well as get a quick introduction to using Outlook with Microsoft Exchange Server 2007 and Windows SharePoint Services 3.0.

The appendixes cover a selection of particularly useful keyboard shortcuts, along with a set of maintenance activities you can do to keep Outlook running its best.

In short, there's a bunch of useful and interesting stuff in every part of this book.

Design Elements

As I hope you can already tell, I've tried to write this book in a casual, easy-to-read style for you. It's designed, to a large extent, so that each chapter stands alone and you can dig in where you want to learn about the specific topics that are most important to you. That said, you can certainly read the book cover-to-cover, and should definitely at least read the introduction to each chapter to get a feel for whether or not you want to read the rest of that chapter.

To make this book even more useful to you, I've included several specific design elements:

- **How To sidebars**   How To sidebars provide step-by-step instructions on completing a specific task.

- **Did You Know sidebars**   Did You Know sidebars contain extra information. They're usually background info such as historical notes or other interesting tidbits.

■ **Note icons**   Note icons provide helpful information related to the topic at hand. Be sure to read any Notes you come across.

■ **Tip icons**   Tip icons describe ways to make better use of a specific feature of Outlook, or provide keyboard shortcuts that can speed up whatever it is you are doing at the time.

■ **Caution icons**   Caution icons flag issues you need to be aware of. You should definitely read these to avoid potential problems.

Now that we have all the preliminary stuff out of the way, it's time to dig into Outlook 2007. If you have any thoughts on the book, or about Outlook 2007 in general, I would love to hear from you. You can reach me by e-mail at Outlook2007@techforyou.com, or visit my website (http://www.living-with-outlook.com) and use the Feedback form.

Thank you, and enjoy *How to Do Everything with Microsoft Office Outlook 2007.*

Part I

Get Acquainted with Microsoft Office Outlook 2007

Chapter 1

Meet Microsoft Office Outlook 2007

How to...

- Navigate the New User Interface
- Use Other New Features and Capabilities
- Deal with What Isn't There Anymore
- Take Advantage of Some Common Keyboard Shortcuts
- Use the Help Systems

Microsoft Office Outlook 2007 (formerly known as Outlook 12) is part of the 2007 Microsoft Office system (a.k.a. Office 2007). Office 2007 is available in many different forms, and Outlook is part of all of those, except the least expensive two. In Office 2007, Outlook received the significant user interface redesign that the rest of the Office suite got, along with a number of unique changes meant to make it easier to use and better adapted to the ways we communicate and manage information today.

This chapter is a quick guide to many of the new and improved features of Outlook, as well as those features that have been removed in the new Outlook. To round out the chapter, you'll learn about the redesigned user interface and how to get help if you get stuck.

Navigate the New User Interface

The new Outlook user interface is a bit schizophrenic, but in a good way. Figure 1-1 shows the Outlook user interface in the Mail view. Except for the To-Do Bar running down the right side of the window (more on that in a bit), this looks pretty much the way Outlook 2003 would if you were running it in Windows Vista.

Now take a look at the New Message window in Figure 1-2. The menus and toolbars that used to be here have been replaced by the Ribbon. This change is meant to make it easier to find the mot commonly used options for creating or editing. Wherever you will be doing a lot of writing or editing of text, the Ribbon is there to make it easier and faster for you.

Do you see what I mean about the interface being schizophrenic? It's one style here, another style there. It can be a bit confusing at first, but it is a good thing in the end. The interface adapts itself to what you are doing. And as you will see later, the Ribbon also adapts itself to what you are doing. If you are someone who has memorized lots of keyboard shortcuts, or have the structure of the old-style menus
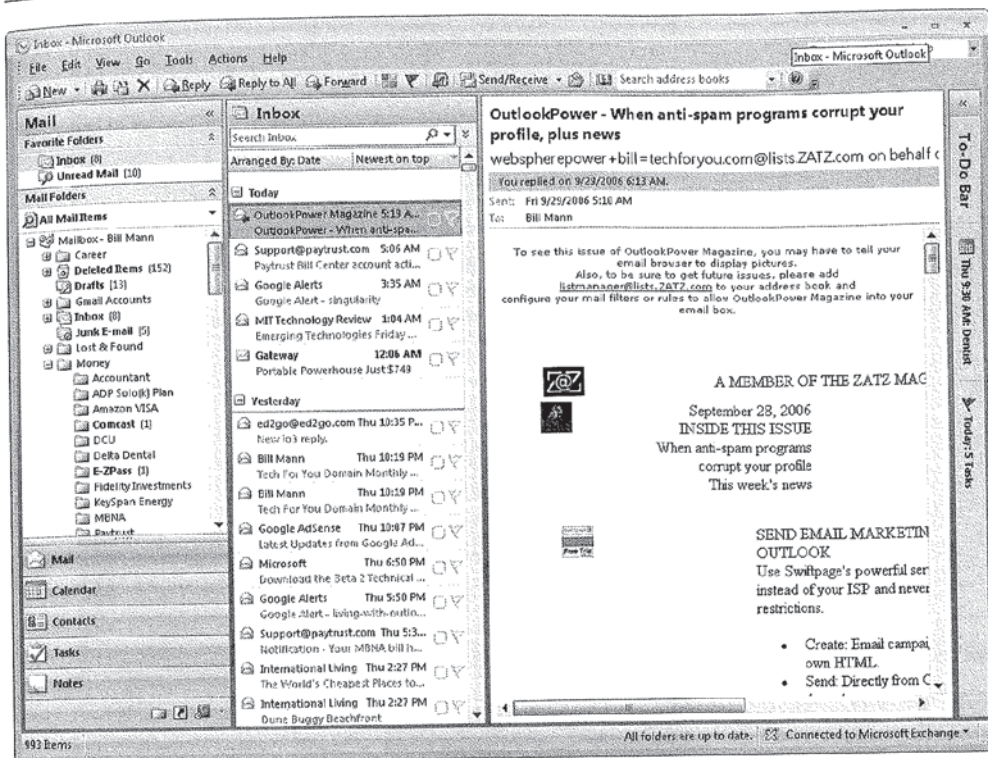
FIGURE 1-1   The Outlook 2007 Mail view.

and toolbars fixed in your mind, you will have some relearning to do. If you aren't that proficient and efficient with Outlook, you will likely find that the redesigned user interface is an improvement.

Either way, you need to get used to the new user interface. Outlook 2007 doesn't give you the option to continue using the old style.

Getting Around and Switching Sections

While Chapter 4 goes into detail on navigating the Mail view specifically, we can use this view to get a quick overview of the user interface.
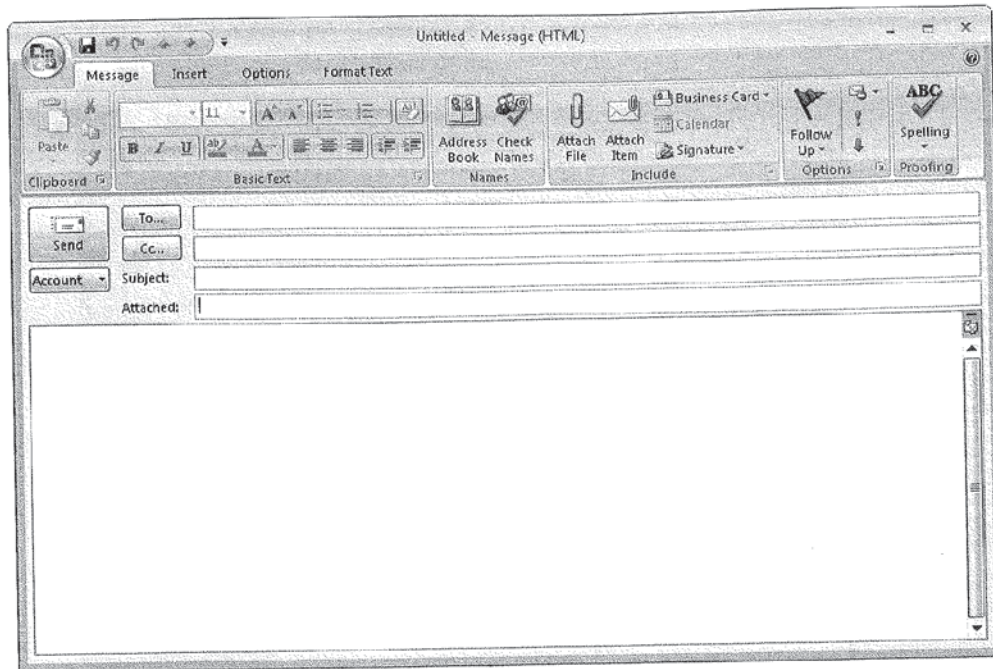
FIGURE 1-2 A New Message window showing the Ribbon user interface.

The bulk of the Outlook window is divided into two or more columns and remains unchanged from Outlook 2003. The leftmost column (shown in Figure 1-3) is the *Navigation pane*. The Navigation pane handles the functions of the Outlook bar and the Folder List you may have used in early versions of Outlook. In addition to these, the Navigation pane displays folders and other information relevant to a specific view.

The content and even the title of the Navigation pane automatically change to match the view you're working in. The main Outlook sections—Mail, Calendar, Contacts, Tasks, Notes, and Journal—each have their own highly customizable view. Changing between sections is as easy as clicking the large buttons at the bottom of the Navigation pane, selecting a destination from the Go menu, or using simple keyboard shortcuts.
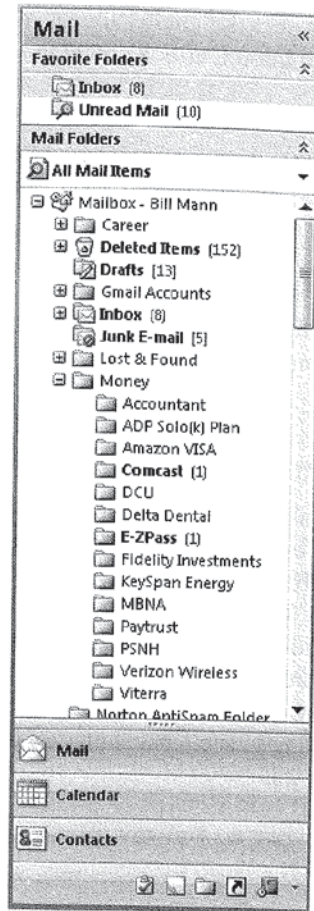
FIGURE 1-3 The Navigation pane lets you move around Outlook quickly.

Next comes a list of the messages that are in the e-mail folder selected in the Navigation pane. This pane works great for this particular Mail view, but doesn't appear in other views where it wouldn't make sense.

Further to the right you find the *Reading pane*. This is a vertically oriented area where you can read messages like you were reading a column of text from a newspaper or magazine, without having to open a message in a new window.

Finally comes the To-Do Bar, which is described in detail in Chapter 8. Each view has its own distinct look, but the goal is always the same: to let you make the best use possible of the information Outlook contains.

NOTE   *Chapter 4 provides complete information on Mail view, the Reading pane, and other interface enhancements that make working with Outlook 2007 a superior experience.*

Use Other New Features and Capabilities

Aside from a new user interface, Outlook 2007 has numerous additional improvements and new features. The following sections discuss some of the major ones.

Instant Search (New)

Instant Search replaces the Search and Advanced Search features of previous versions of Outlook. Instant Search relies on indexing the contents of Outlook items and is extremely fast. It is so fast, in fact, that as you type the characters of the word or phrase you want to search for, Instant Search displays the items that contain those characters. Aside from being pretty cool, this is quite useful, since you can stop typing your search as soon as the item you are looking for appears. Compare this to the old approach of typing in your entire search word or phrase, clicking Find Now, and waiting to see what shows up. By default, Instant Search is always available in these views:

- Calendar
- Contacts
- Folder List
- Journal
- Mail
- Tasks

The Instant Search box integrates itself smoothly into each view. It looks like it belongs (see Figure 1-4), and it is that much quicker to do a search when the box is right there on the screen for you.
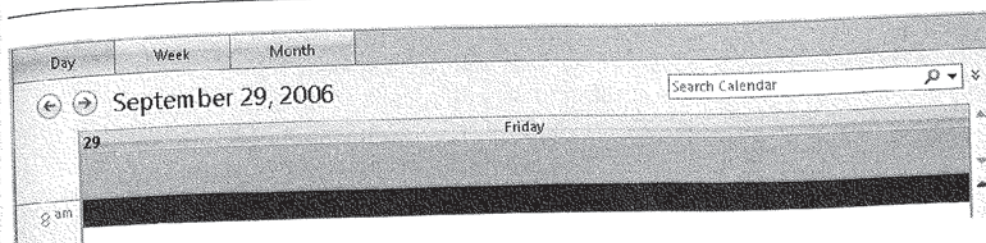
FIGURE 1-4   The Instant Search box integrates itself nicely into the views where it is available.

NOTE   *Chapter 13 covers Instant Search in detail.*

Attachment Previewing (New)

Outlook 2003 lets you preview messages without opening them. Outlook 2007 lets you preview attachments to those messages. Say that Sally sends you a message with an Excel spreadsheet and you don't want to do anything with it right now, beyond figuring out whether it is the one for the Johnson project or the one for the Smith project. With attachment previewing, you can take a quick look at the spreadsheet without having to open Excel and load the whole thing.

Right out of the box, Attachment Preview works with attached Microsoft Office documents. Despite a few little quirks you need to be aware of, Attachment Preview can definitely add some speed and convenience to your life with Outlook.

NOTE   *Chapter 3 provides more information on previewing attachments.*

Enhanced Calendar Capabilities (New)

The Calendar got a significant reworking in this release of Outlook. It is easier than ever to share calendar information with others and to work with multiple calendars simultaneously. Internet calendars are, not surprisingly, calendars published on the Internet. Outlook 2007 lets you view Internet calendars published by others, or publish your own Internet calendars. For even quicker results, you can publish Calendar Snapshots to the Microsoft Office Online website.

I like the ways you can view multiple calendars simultaneously. Side-by-side calendars are useful—overlaid calendars are even more so. If you keep separate
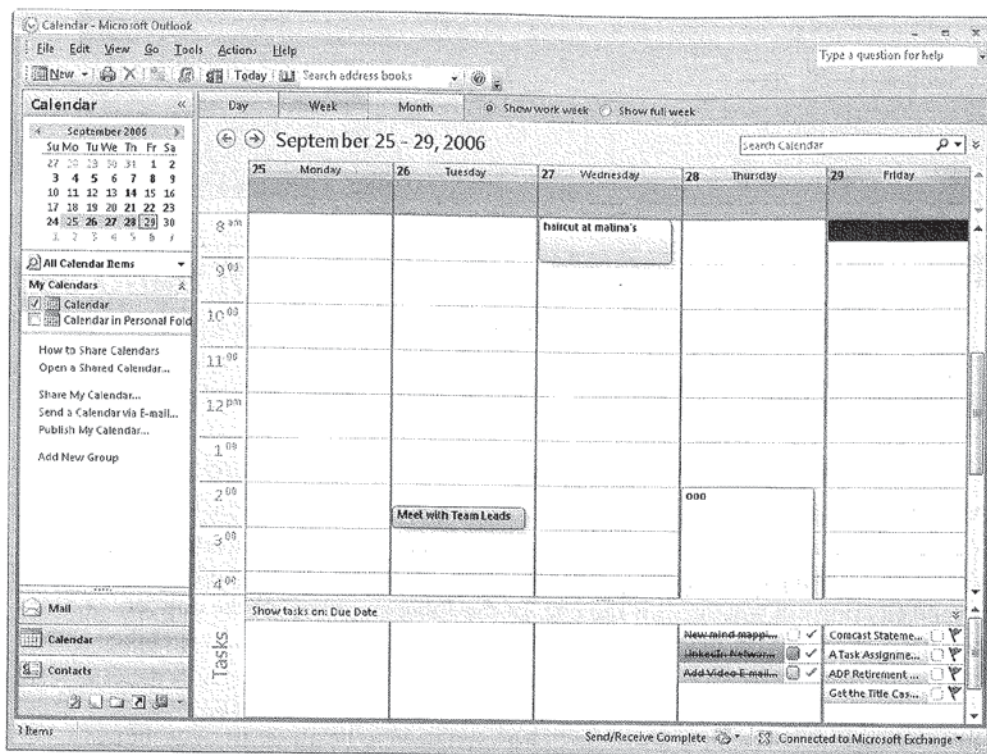
FIGURE 1-5   The Calendar got a lot of enhancements in Outlook 2007.

business and personal calendars, viewing them overlaid is so convenient. You can see your whole schedule in one spot instantly. Figure 1-5 shows some of the new features of the Calendar view, including my overlaid calendars.

Another useful addition to the Calendar is task integration. If you've ever blocked out a chunk of time on the Calendar to work on a particular task, you'll love this one. Tasks automatically appear below the Calendar on the day they are scheduled to be done. You can drag them from there right into the Calendar itself and block out the time to complete them in seconds.

NOTE   *Chapter 7 is dedicated to the Calendar.*

RSS Integration (New)

Once upon a time Usenet newsgroups were the "in" way to publish information on the Internet. Today, blogs and syndicated newsfeeds are the way to get the word out. The technology of choice for distributing this information is through RSS (Really Simple Syndication) feeds. Outlook 2007 has the ability to receive RSS feeds, and treats them as if they were just another form of e-mail. That means you can read them, flag them, color code them, and apply rules to them just like regular e-mail messages.

To make using RSS even easier, Outlook includes a directory of useful RSS feeds that you can subscribe to with only a few clicks.

NOTE   *Everything you need to know to make RSS feeds a part of your Outlook lifestyle appears in Chapter 5.*

Electronic Business Cards (New)

Outlook XP and 2003 have address cards. Outlook 2007 has electronic business cards. These are electronic versions of the classic business cards people have been handing out since, well, forever. They're a graphical way to present your contact information to someone, and can include logos, even photos. Figure 1-6 shows an example.

You can hand out electronic business cards as attachments to messages or place them in your e-mail signature. The Business Cards view replaces the Address Cards view of previous Outlook versions.

NOTE   *Chapter 6 has all the information you could want about electronic business cards.*

Smith, John

John Smith
Manager

(425) 555-0150 Work
Fax

Acme Gadgets
1234 Wiley Rd.
Coyote, KS 01234
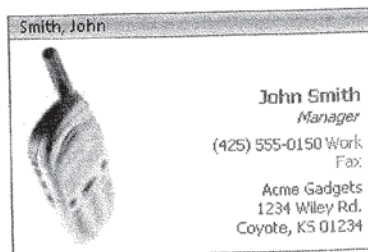
FIGURE 1-6   Electronic business cards can help you get noticed.

Outlook E-mail Postmarks (New)

Have you ever received any junk e-mail messages in Outlook? I thought so. Outlook E-mail Postmarks are an attempt by Microsoft to reduce the amount of junk that makes it into our Inbox. Outlook's junk e-mail filtering system can check messages for valid postmarks, and use that information to help decide whether a message is junk or something you might actually want.

NOTE *If you want to learn more about how Outlook E-mail Postmarks might cut some of your junk mail (or how you manage this unusual feature), turn to Chapter 14.*

The Trust Center (New)

The Outlook E-mail Postmarks you just read about are unusual not only in what they do, but in the fact that they are not controlled from the Trust Center, a one-stop control center for security and privacy-related features. From managing add-ins to warning you of suspicious activity by other programs, the Trust Center (shown in Figure 1-7) is the first place to look when you want to manage Outlook security and privacy.

NOTE *The Trust Center is featured in Chapter 14.*

Reworked Search Folders (Improved)

Search folders are virtual folders that address the problem of what to do with messages that pertain to more than one subject. One message can appear in many search folders without your having to move or copy it. Outlook 2003 came with four predefined search folders (For Follow Up, Important E-mail, Large E-mail, and Unread E-mail). In Outlook 2007, the changes to the way messages are flagged and color-coded mean some new options for search folders.

NOTE *Outlook 2007's improved ability to flag and categorize items (the color categories described next) has made this already valuable feature even more powerful. See Chapter 10 for the details.*

Color Categories (Improved)

In Outlook 2003, you could apply colors to things like Calendar appointments. The splashes of color made it a lot easier to pick out specific appointments in
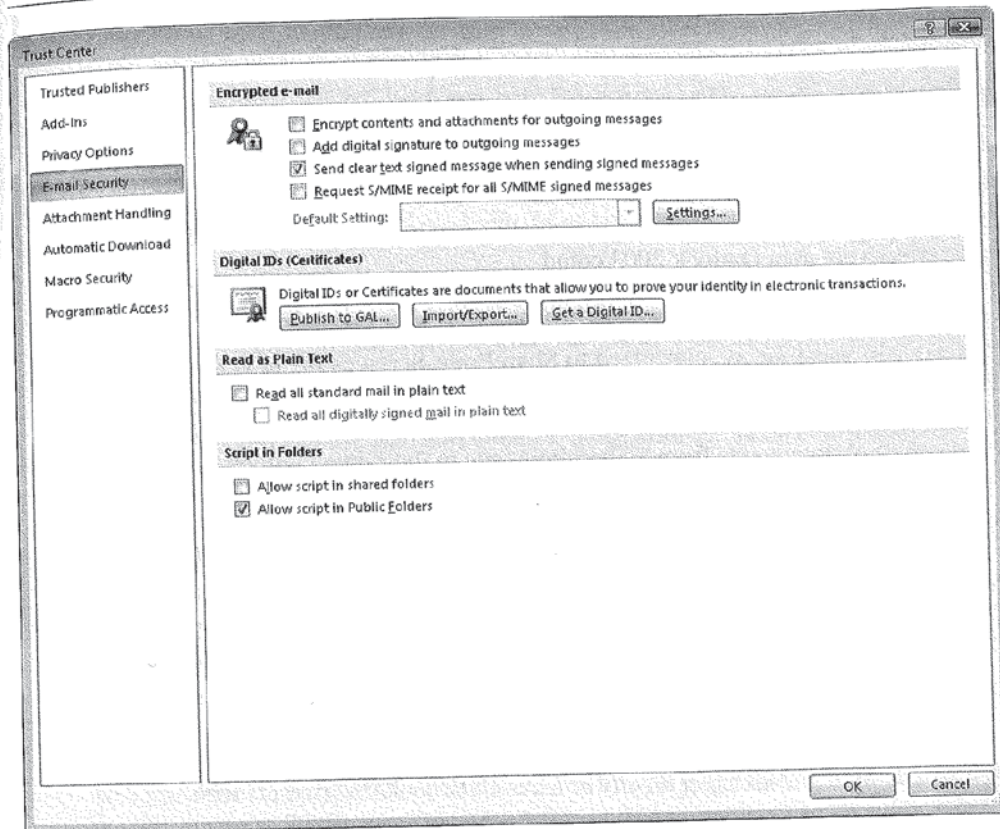
FIGURE 1-7   You manage most Outlook security features in the Trust Center.

your crowded days. Outlook 2007 color categories take this basic concept, and really run with it. Now you can apply color categories to any Outlook item. Assign a descriptive name to a color, then apply that color category to any related item. Going to Ireland in the Spring? Create a bright green color category named Eire, and apply it to every message, appointment, and task related to your trip. You'll always be able to keep track of anything to do with your big trip to the Emerald Isle.

Outlook 2007 rules and search folders understand color categories too. That means you can apply rules for handling all those trip-related items, or create a search folder that only shows stuff related to the trip.

NOTE

Chapter 4 is the place to go to learn how you can use color categories to track and manage your own special projects and plans.

Enhanced SharePoint Services and Exchange Server Integration (Improved)

In the corporate world, Outlook is often hooked up to Windows SharePoint Services and a Microsoft Exchange Server. Outlook 2007 can integrate itself with them even more effectively than Outlook 2003 could.

When it comes to SharePoint Services, Outlook 2007 lets you work with shared calendars, contacts, and tasks whether you are connected or not. Any changes you make get synchronized to SharePoint Services the next time you are connected. Similarly, any updates that have taken place since you were last connected flow back to Outlook so you can stay up to date. Outlook 2007 also can store copies of documents from a SharePoint site in their own Outlook folders, letting you work with them on- or offline, then synchronize any changes the next time you are connected.

As with previous versions of Outlook, while many Outlook 2007 features work independently, others require a connection to a Microsoft Exchange Server. These are addressed in the relevant chapters. However, when Exchange 2007 and Outlook 2007 play together, you also get new or greatly enhanced features, such as unified messaging. Unified messaging means things like getting faxes and voice mails delivered to your Inbox.

NOTE

Chapter 17 looks specifically at ways Outlook 2007 interacts with SharePoint Services and Microsoft Exchange Server 2007.

Enhanced Information Rights Management (IRM) (Improved)

Information Rights Management (IRM) is for when you are serious about getting control over your information. You can use IRM to enforce rules on who gets to see what information and what they can do with it. IRM technology is built into all Office 2007 products, including Outlook, where it controls things like whether you can forward a message you receive.

NOTE

I've put IRM-related information in Chapter 14. And the rules of this book say that anyone can read it.

Deal with What Isn't There Anymore

If you've been using Outlook 2003, you will find that Outlook 2007 has a lot of new features, but no longer has some features you may have relied on in the past. Here I'm going to fill you in on features that are no longer supported in Outlook 2007, and ways you can work around their elimination.

No More Native Outlook E-Mail Editor

Previous versions of Outlook came with a built-in editor you could use for e-mail messages. No more. Now you *must* use Microsoft Office Word 2007 as your e-mail editor. Thoughtfully, Microsoft includes with Outlook 2007, some software that provides the basic Word 2007 capabilities on computers that have Outlook 2007 but not Word 2007. You can't use it to work on Word documents or anything like that. But you can use it to edit Outlook items with the same commands you would use in Word.

No More NetMeeting

Microsoft has discontinued support for NetMeeting, Microsoft Exchange Conferencing, and Microsoft Windows Media Services. What can you do if you relied on any of these services? Microsoft recommends switching to Office Live Meeting (see Figure 1-8).

Office Live Meeting has lots of capabilities. It also has a flexible pricing plan, with fixed monthly charges for five or ten seats, and a pay-per-use plan running $0.35 per minute per participant. Office Live Meeting, and Office Live as a whole, is still in beta at the time of this writing. If you are interested in Office Live Meeting, I suggest you go to the Office Live Meeting home page for the latest information. Visit http://office.microsoft.com/en-us/FX010909711033.aspx.

The End of the Personal Address Book

Outlook 2007 doesn't support the Personal Address Book. When you install Outlook 2007, it imports contacts from the Personal Address Book and stores them in the default Outlook Contacts folder, or a destination of your choice.

Okay, I exaggerated a bit. The Personal Address Book doesn't really go away when you install Outlook 2007. It's just that after importing contacts from the Personal Address Book, Outlook 2007 ignores it. Working around this shouldn't be a big deal, since your contacts get imported.
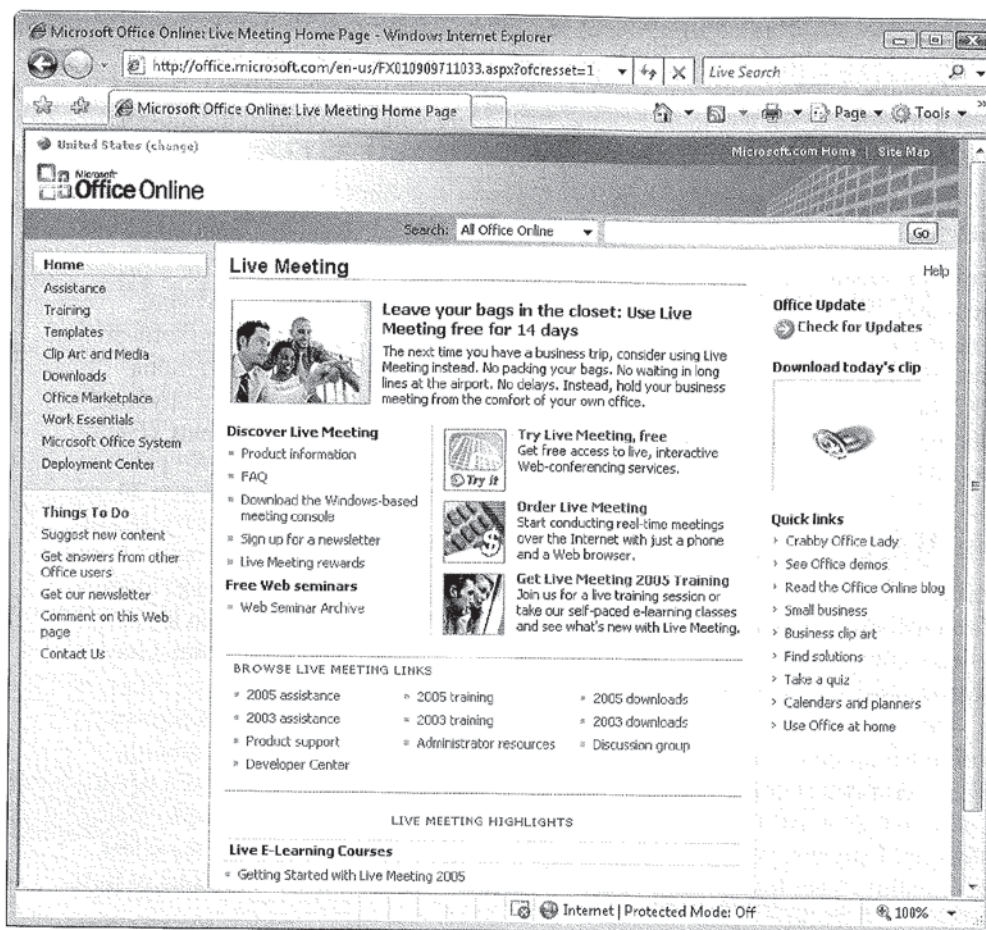
FIGURE 1-8 Microsoft Office Live Meeting replaces NetMeeting and similar services.

Farewell, Oh TaskPad

I found the TaskPad to be one of the more useful features of Outlook 2003. The TaskPad has bowed out of Outlook 2007, but this is actually a good thing. The TaskPad has been replaced by the To-Do Bar, which is even more useful. I don't think we'll miss the TaskPad at all.

1

For Follow Up Flags Are Permanently Lowered

For Follow Up flags were a way to keep track of messages that needed future attention. I used them a lot, but not very efficiently. Now they're gone, replaced by the task flags and color categories of Outlook 2007. In other words, they've been absorbed into a more general, flexible, and colorful way of keeping track of stuff. The big issue in working around this change is the question of what happens to all the messages you have flagged For Follow Up when it's time to upgrade to Outlook 2007.

The answer is that you need to put some work into the transition. Your existing For Follow Up items appear in an Outlook 2007 search folder called, appropriately enough, For Follow Up. So you don't lose them. But they don't really fit into the Outlook 2007 way of handling things either. You should evaluate each item in the For Follow Up folder, and assign them to the appropriate color category. Depending on how many items you had marked when you made the switch, this could take a while, but you only need to do it once. Besides, putting in the effort up front will mean that you don't have to deal with two different ways of tracking items within the same program.

All Signatures Get Created in One Place

In my Outlook 2003 classes, people frequently had problems with e-mail signatures. When you used Word as your e-mail editor, you created signatures with one tool. When you used the built-in editor, you created signatures a different way. Worse, signatures created with one editor weren't available for use with the other editor.

That problem has gone away in Outlook 2007. Since it only supports Word 2007 as its e-mail editor, you can only create Outlook 2007 e-mail signatures using Word 2007. This shouldn't be a problem for you, unless you've created signatures using the built-in editor from earlier versions of Outlook. In this case, you will have to re-create those signatures.

Detect and Repair Is Undetectable

The Detect and Repair feature that was part of Office 2003 is gone, replaced by Microsoft Office Diagnostics. I hope Outlook 2007 (or Office 2007 for that matter) never gets so broken that you need to use this feature. A few of my thousand-plus students have needed it, so it's good to know this feature is available.

NOTE *See Appendix B for information on how to keep your copy of Outlook running its best, including how to use Microsoft Office Diagnostics if things go badly wrong.*

Various other (generally more minor) features and functions have been dropped from Outlook 2007. If you would like to see a complete list, you can search the Outlook help system for the word "discontinued." You'll see how to use the Outlook 2007 help systems at the end of this chapter, but first, let's talk about some common keyboard shortcuts that can make it faster and easier to do many things in Outlook 2007, including opening the help system so you can search for discontinued features and functions.

Take Advantage of Some Common Keyboard Shortcuts

Keyboard shortcuts provide an easy way to navigate the Outlook interface. Keyboard shortcuts are combinations of keystrokes that perform some function that would otherwise require a mouse click, a series of clicks, or even navigating menus or dialog boxes. Memorizing and using keyboard shortcuts can really speed things up when you work with Outlook 2007. You can enter a keyboard shortcut in a fraction of the time it takes to move the mouse and click something. You save even more time when you have to move your hand off the keyboard to reach the mouse. The seconds you save with keyboard shortcuts add up over the course of a day. It's a small improvement but a real one.

NOTE *If you learned the keyboard shortcuts in Outlook 2003, you are in luck. The new Outlook 2007 user interface brings with it new keyboard shortcuts, but still supports the old ones.*

Some keyboard shortcuts that you will find particularly useful when navigating the Outlook 2007 user interface are:

- The TAB key and arrow keys let you navigate a dialog box.

- CTRL-TAB moves through the tabbed pages of a dialog box.

- The ENTER key activates the command that the focus is on. You can tell which command has the focus because it will be highlighted, or its name will be surrounded by a box made of dotted lines.

- The SPACEBAR sets or clears the selected check box.

- SHIFT-F10 opens the shortcut menu related to the selected item. This is the same menu you get if you right-click the item.

■ ALT-F4 closes the active window.

■ F1 opens the Help window.

■ CTRL-1 opens the Mail view.

■ CTRL-2 opens the Calendar view.

■ CTRL-3 opens the Contacts view.

■ CTRL-4 opens the Tasks view.

■ CTRL-5 opens the Notes view.

■ CTRL-6 opens the Folder List in the Navigation pane.

■ CTRL-7 opens the Shortcuts list in the Navigation pane.

One thing that will take getting used to is the way keyboard shortcuts work with the Ribbon. When the Ribbon is on the screen, you press and release the ALT key, followed by one or more additional keys to execute keyboard shortcuts. However, you can also just press the ALT key to see what are called *Key Tip badges*. These badges appear on the commands, and contain the keys you press (along with the ALT key) to execute the command. Figure 1-9 shows what this looks like.

When you are working in a dialog box that has a Ribbon with multiple tabbed pages, the first key after the ALT key selects the tabbed page in the Ribbon, and the remaining keys select the particular command on that page. One example is the command to center a paragraph while editing a message. To enter it, you press and release the ALT key, then you press and release the H key, the A key, and the C key.

NOTE   *You can find a much more extensive list of Outlook keyboard shortcuts in Appendix A, along with a detailed explanation of how Key Tips work. You will also find the keyboard shortcuts for specific actions listed where the action itself appears in the book.*
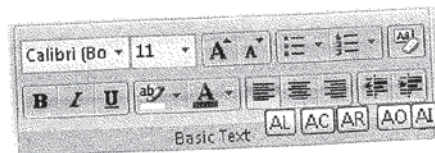
FIGURE 1-9   Key Tip badges help you learn the Ribbon keyboard shortcuts.

Use the Help System

While this book gives you the information you need to use Outlook 2007 as it originally shipped, programs like Outlook don't remain unchanged over their lives. Because Microsoft can modify Outlook through Service Packs and patches, the program will change over time, at least a little. Besides, the chances are decent that over the years if you use Outlook 2007, you will come up with a question or two that this book doesn't answer. So knowing how to use the Outlook help system will be important to you. Please take a few minutes to read this section of the chapter and familiarize yourself with the redesigned help system found in Outlook 2007 and other Microsoft Office Outlook 2007 products.

In Office 2007, Microsoft has combined the various older help systems into one unified system, displayed in the Help Viewer, and tied directly into Microsoft Office Online. The Help Viewer replaces the Help window, Office Assistants, and so on with the clean two-pane window shown in Figure 1-10. Clicking the Microsoft Office Outlook Help option in the Help menu takes you directly to the Help Viewer, as does pressing the F1 key.

The Type a Question for Help box that appears in the upper-right corner of the Outlook window takes you to the Help Viewer, where it displays a list of topics that match the question you typed.

Navigating the Help Viewer

The Help Viewer works a lot like your web browser. The toolbar has a set of browser-like buttons you can use to navigate as if the help system were a website. This makes sense, since the information in the help system comes mainly from the Office Online website. Outlook 2007 does come with a help system when you first install it, but it checks Office Online for the most current information and displays it.
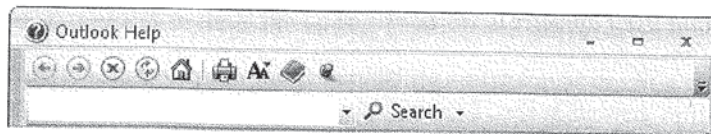
FIGURE 1-10 The Help Viewer is a single location for all your Outlook help needs.

Most of the buttons in the toolbar will be clear to you if you've used a web browser, but a few merit short explanations:

- The Home button looks like a house, and takes you to the home page of the help system on Office Online.

- The Table of Contents button looks like a book. Click it to make the help system Table of Contents appear or disappear. When visible, the Table of Contents is a pane on the left side of the Help Viewer.

- The Keep on Top button looks like a push pin. When the pin appears as if it is pushed in, it makes the Help Viewer always appear on top of anything else on your Windows desktop. When not pushed in, the Help Viewer acts like any normal window and can be hidden beneath other open windows.

Below the toolbar is a Search box that you can use to search the Outlook help system as well as some additional resources. Click the down arrow in the Search button to see a list of places to search.

When it comes to navigating within the help pane itself, treat it as if you were navigating a website. Click links to follow them, use the arrows to navigate between panes you've visited, and click the Home button to return to the start of the help system. With this information, you should be all set to use the Outlook help system.

Welcome to Microsoft Office Outlook 2007

This chapter has given you a quick tour of what's new and cool in Outlook 2007. It also showed you how to deal with the absence of some of the stuff that was in Outlook 2003 but isn't in Outlook 2007. Next, we looked at some particularly useful keyboard shortcuts you can use with Outlook. Finally, you learned the basic information you need to use the new Outlook 2007 help system embodied in the Help Viewer.

It's almost time to really dig into specific aspects of Outlook 2007. But before you do, Chapter 2 helps you to be clear on the environment where you'll be using Outlook 2007, and shows you how to import information from an older version of Outlook if you've just upgraded to Office Outlook 2007.

Chapter 2

Get Ready to Dig In

How to...

- Understand Your Outlook Environment
- Avoid Upgrade Problems
- Install Outlook 2007
- Start Outlook for the First Time
- Set Up E-Mail Accounts
- Decide Where Outlook Stores Your Information

In this chapter you'll learn how to install and configure Outlook 2007. But before you do that, it's worth spending a few minutes thinking about the environment in which you will use Outlook. Outlook is still Outlook whether it is connected to a Microsoft Exchange server on a major corporate network or is running as a standalone e-mail program on your home computer. But some aspects of installing and using Outlook do vary depending on the environment. The first part of this chapter describes the major environments you might use Outlook in, and points out any issues you should be aware of.

It's also worth spending some time learning about potential snags that can cause problems when you upgrade to Outlook 2007 from an earlier version of Outlook. The next part of the chapter addresses some possible problem areas.

After all that, it's finally time to start working with Outlook itself. In the last part of this chapter, you'll install Outlook (if it isn't already installed on your system), go through product activation, and complete the basic configuration tasks. By the time you finish, Outlook should be up and running and you should be ready to send and receive e-mail.

Understand Your Outlook Environment

As I mentioned in the beginning of the chapter, some aspects of Outlook differ depending on the environment in which you use the program. While you can install Outlook and start using it without worrying about these differences, it can be useful to at least know about them, particularly if you are installing and maintaining Outlook yourself.

Outlook as a Standalone E-Mail Program

If you will be using Outlook at home, you will probably be using it as a standalone e-mail program. This means that Outlook will most likely connect directly to your

Internet Service Provider for access to your e-mail. It also means that all your Outlook data will be stored on your PC, instead of on a central server that's backed up by someone else. Finally, using Outlook as a standalone program means that you'll likely have to set up your own e-mail accounts; attend to your own online security concerns; and manage, archive, and maintain your own Outlook data.

NOTE *When I refer to Outlook 2007 as a standalone e-mail program, I am only referring to the idea of not using Outlook with Microsoft Exchange. You may be using Outlook as part of Microsoft Office, or by itself, and I would still call it a standalone e-mail program if it isn't connected to Exchange.*

I wrote this book assuming that you are using Outlook as a standalone program. With the exception of a few sections that are specific to the use of Microsoft Exchange or SharePoint Services, everything in the book is relevant to you, and you should find Outlook working as described in these pages.

Outlook with Microsoft Exchange

If you will be using Outlook in a corporate setting, it will probably be connected to a Microsoft Exchange server on the corporate network, and perhaps to Windows SharePoint Services as well. In this environment, the Exchange server interacts with the outside world. Outlook works as a client of Exchange, interacting with the rest of the world through Exchange.

You need to be aware of several things when you are using Outlook as a client of Exchange. The first and most important is that you need to talk to your network administrator before upgrading to or installing Outlook 2007. This is very important! Very few network administrators are comfortable having users installing major applications such as Outlook without explicit permission and detailed instructions provided by the administrator.

Beyond this, there are several other things you should keep in mind. In most corporations today, by default, Exchange stores all your Outlook data on central servers, rather than on your computer. This is good in that your data will almost certainly be backed up for you. But it is bad in that if you lose the connection to Exchange (say the network fails), you won't be able to do much in Outlook.

However, if your network administrator authorizes you to use Cached Exchange Mode (more on this in a bit), Outlook maintains a continually updated copy of your data on your hard drive. In Cached Exchange Mode, Outlook becomes much less affected by the performance of the network. Within limits, you can work efficiently across slow or unreliable connections, and even work with your data while completely disconnected from the network (Outlook synchronizes everything for you the next time you have a connection).

The other important thing to know about using Outlook when connected to an Exchange server is that the network administrator can define policies that override your personal control of Outlook features. One example is a corporate retention policy, which limits how long you can store certain Outlook items.

Outlook with Windows SharePoint Services

Windows SharePoint Services allow you to connect Outlook to a shared team website like the one in Figure 2-1. When you link Outlook to a shared team site, you can synchronize contacts, events, and tasks with the site, share discussion lists, use Outlook as a library for SharePoint documents, and export some or all of your contacts to the team website.
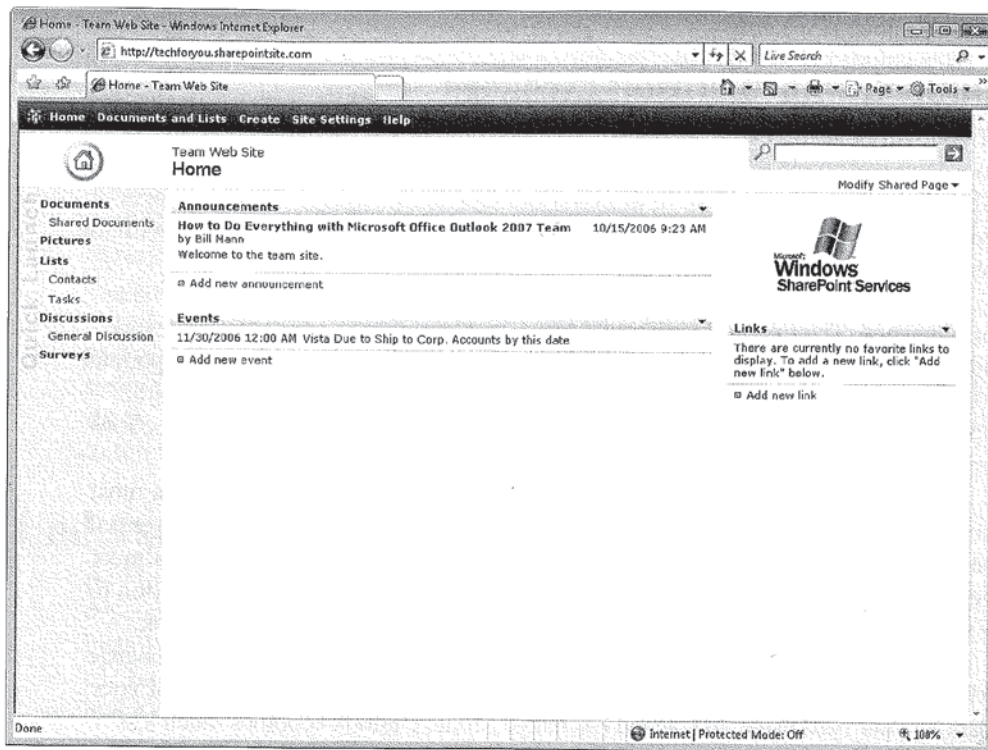
FIGURE 2-1 Outlook integrates with Windows SharePoint Services.

If you use Windows SharePoint Services to connect Outlook to a team website, you will probably do so in a corporate setting, likely as part of a project team.

> TIP *For more information on using Outlook with Windows SharePoint Services, see Chapter 17.*

Avoid Upgrade Problems

If you use an earlier version of Outlook right now and are preparing to upgrade to Outlook 2007, you should find that the upgrade goes smoothly in the majority of cases. However, there are a few situations where you might run into problems:

- Outlook 2007 does not coexist with earlier versions
- Outlook 2007 does not have its own editor

Outlook 2007 Does Not Coexist with Earlier Versions

Outlook 2007 cannot coexist with earlier versions of Outlook. This means that you can't keep a copy of Outlook 2003 (or any earlier version) on your computer when you install Outlook 2007. If you do not uninstall earlier versions of Outlook before you start Outlook 2007, you will be directed to do so before you can use Outlook 2007.

> TIP *If you must run Outlook 2003 or an older version on a computer for some reason, do not install Outlook 2007 on that computer.*

Outlook 2007 Does Not Have Its Own Editor

Previous versions of Outlook had a built-in editor that you could use instead of Microsoft Office Word for editing e-mail messages. This editor worked differently than Word, and had different capabilities. In particular, it had it's own way of doing e-mail signatures, and kept them separate from those created with Word as the editor. Outlook 2007 does not have its own e-mail editor. It either uses Microsoft Office Word 2007 (if that is installed) or an included subset of Word 2007 if Word is not installed on the computer. If you previously used Outlook's built-in editor, you will need to get used to using Word (or at least a subset of it) for editing your Outlook 2007 items.

Install Outlook 2007

At the time of this writing the Microsoft Office 2007 system is planned to be available in eight different suites. Four of them include Outlook 2007. These four suites contain Outlook 2007:

- Microsoft Office Basic 2007

- Microsoft Office Standard 2007

- Microsoft Office Professional Plus 2007

- Microsoft Office Enterprise 2007

If you have one of these Microsoft Office 2007 system suites installed, Outlook 2007 should already be installed on your computer.

If you have one of the other four Microsoft Office 2007 system suites installed, or do not have an Office 2007 suite installed on your computer, you will need to acquire and install Outlook 2007 separately.

Fortunately, if you're using Outlook 2007 at work, the IT department has probably already installed it for you. Either that or they will provide you with instructions on how to install it according to company policy.

If you have to install Outlook yourself, whether as a new installation or an upgrade, don't worry; it isn't very hard to do. All you really need to do is make sure that your product key (the long sequence of letters and numbers unique to each copy of Outlook) is handy and follow the instructions as they appear onscreen.

TIP   *If you are upgrading from a previous version of Outlook or from another e-mail program, Outlook will offer to upgrade from that program. As part of upgrading, Outlook will copy the e-mail messages, contacts, and other settings from your old e-mail program. I strongly recommend taking advantage of this option if it's offered.*

During installation, an Account Configuration dialog box may appear. In it, Outlook offers to help you connect to an e-mail server. You'll learn all about the process later in the chapter, so for now, decline this option and finish the installation.

Start Outlook

You can now start Outlook. Assuming this is the first time Outlook 2007 has been started on your computer, you'll see the Product Activation dialog box. Product activation is an attempt by Microsoft to eliminate, or at least reduce, software piracy. The idea behind it is simple. When you install a product that requires activation, the installation program examines the hardware in your computer and generates an activation ID. Assuming your PC is connected to the Internet, the product then checks your activation ID against a central database at Microsoft to be sure that your copy of Outlook has not already been activated on another computer.

If you don't activate Outlook right away, a reminder appears each time you start the program. You can only start Outlook 50 times without activating it. After that, Outlook only lets you view items, but not create new ones until you activate the product.

When you activate Outlook 2007, you can enter lots of personal information, but only your country or region is required. If your computer has an Internet connection, you can activate Outlook across the Internet. This takes a minute or two.

CAUTION *Don't be surprised if a message pops up on your screen warning you that a program is trying to connect to the Internet while you are activating Outlook. This is just your antivirus or anti-spyware program doing its job. If this happens, just click OK, click Yes, or click whichever button is needed to allow the Internet connection.*

You use the Activation Wizard to activate Outlook 2007 across the Internet. If the Activation Wizard is not visible, closing Outlook and opening it again should bring the Activation Wizard into view. Follow these steps to activate Outlook:

1. Read the Microsoft Office Privacy Policy in the initial Activation Wizard screen, and then click Next to go to the Customer Information screen.

2. Select your country or region in the Country/Region list. All other information is optional. Click Next to continue.

3. Follow the onscreen instructions to complete the activation process.

The main Outlook window should now be visible. Which folder appears when you start Outlook is determined by settings Outlook 2007 inherited from your previous version or settings that the IT department entered. You can make Outlook

open in whichever folder you want, including folders you define yourself, by following the procedures in Chapter 11.

Now that Outlook is installed and running, you might want to play around with it a bit and check out some of the features you learned about in Chapter 1. Go right ahead. After you're done playing, come back here to learn about setting up additional e-mail accounts.

Set Up E-Mail Accounts

If you upgraded to Outlook 2007 from an earlier version, your e-mail account should already be set up for you. Similarly, if someone from your IT department at work sets up Outlook for you, your work e-mail account is probably already set up. In such cases, you may be wondering why you need to be concerned with setting up an e-mail account. The answer: Because most people have more than one e-mail account. You might have a work account that's connected to the Microsoft Exchange server at the office, as well as a personal one running on an Internet service such as Yahoo! or Hotmail. Many people have multiple work accounts and personal accounts. I have at least a half-dozen for various purposes.

Most e-mail services provide their own interfaces to their e-mail system, meaning you have to check for e-mail in two, three, or more different places. But with a little work, you can set up Outlook to handle virtually any e-mail account on virtually any system. You can arrange for all of your e-mail to come to the Outlook Inbox. You can read your e-mail and write e-mail messages for all your e-mail accounts in Outlook.

Outlook's ability to easily handle multiple e-mail accounts can save you lots of time and effort, but you need to learn a few simple rules that govern how Outlook handles multiple accounts. For now, the goal is to get Outlook connected to these accounts. You'll learn how to work with multiple accounts in Chapter 4.

NOTE   *Outlook 2007 works with e-mail servers using the following protocols: POP3, IMAP, and HTTP.*

Outlook 2007 includes Auto Account Setup. Feed Auto Account Setup your name, an existing e-mail address, and the password associated with that e-mail address. With that information Auto Account Setup attempts to connect to the server associated with that e-mail address and automatically configure Outlook for access to that account. While Auto Account Setup doesn't always succeed, when it does, it is a huge improvement over manually configuring an account. To see what I mean, check out the "Did You Know the Information Needed to Configure an Account Manually" box.

2

Did you know?

The Information Needed to Configure an Account Manually

If you must manually configure Outlook to connect to an existing e-mail account, you will need to have the following information:

- The type of the e-mail server you will be connecting to. Most of the time when you are working with accounts outside of work, you connect to a POP3 server.

- The name of the incoming mail server (the e-mail server that handles messages being sent to your account).

- The name of the outgoing mail server (the e-mail server that handles messages being sent from the account).

- The account's e-mail address. Outlook uses this to tell the server which e-mail account it wants to connect to.

- Your name. Whatever you enter in this field will appear in the From box of messages you send.

- The user name of the e-mail account Outlook will be connecting to. Usually, the user name is the first part of the e-mail address.

- The password for the e-mail account.

- Any special information that the ISP requires.

TIP *This book's special project walks you through the entire process of acquiring a Hotmail or Gmail e-mail account and connecting Outlook 2007 to it.*

CAUTION *At work, most e-mail administrators don't take kindly to the idea of employees connecting to additional e-mail accounts without permission. Assuming you get approval to go ahead, the administrator will likely set up the account for you or give you detailed instructions for setting it up.*

Did you know?

Providers Are Blocking Outlook Access?

Once upon a time (like 3 or 4 years ago) if you had an e-mail account at your Internet Service Provider, you could almost surely connect to it with Outlook. Today, things have changed. For whatever reason (to make it expensive for spammers, to recoup costs, or just because people were willing to put up with it) most Internet Service Providers have decided to block Outlook access to their free e-mail accounts. You can still use Outlook with your e-mail account, but to do so you must upgrade the account and pay a monthly or yearly fee. These fees are usually small, typically $20 per year for the cheapest, but they do exist.

The major exception to this trend is Google's Gmail accounts, which are free and still allow you to use Outlook with them.

The moral of the story is this: Before you try to connect Outlook to your e-mail account, visit the provider's website, or talk to their support people to find out if they do allow Outlook access to your e-mail and if they charge a fee for the privilege.

Set Up Exchange E-Mail Accounts

Microsoft Exchange is the corporate messaging server Outlook is designed to work with. Since it is part of the corporate messaging system, Exchange is not something you can mess around with by, for example, setting up Exchange e-mail accounts on your own. Not only is it a bad idea to set up an Exchange e-mail account without the administrator's guidance, but you need additional information to get the job done.

NOTE *If you use a hosted Exchange mailbox for your personal e-mail, you will likely have more flexibility as to what you can do with your account. See Chapter 15 for more information on hosted Exchange mailboxes.*

TIP *See Chapter 17 for more information on using Outlook with Exchange.*

Set Up E-Mail Accounts with Auto Account Setup

Unless you already know it won't work, setting up e-mail accounts with Auto Account Setup is clearly the way to go. Letting Outlook do all the work saves you time and reduces the chances of making a mistake.

Set Up an E-Mail Account with Auto Account Setup

For this procedure, we are assuming that the account you want to set up is one that supports Outlook access. Follow these steps to set up an e-mail account with Auto Account Setup:

1. In the main Outlook window, click Tools | Account Settings. This opens the Account Settings dialog box. Click the E-mail tab to see a view like Figure 2-2.
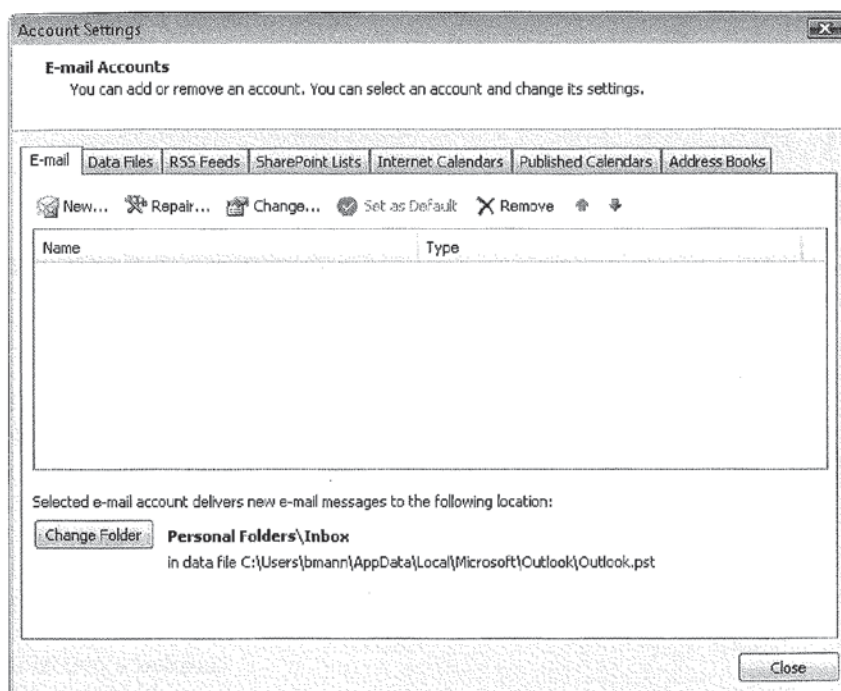
FIGURE 2-2   You launch the Auto Account Setup Wizard from here.
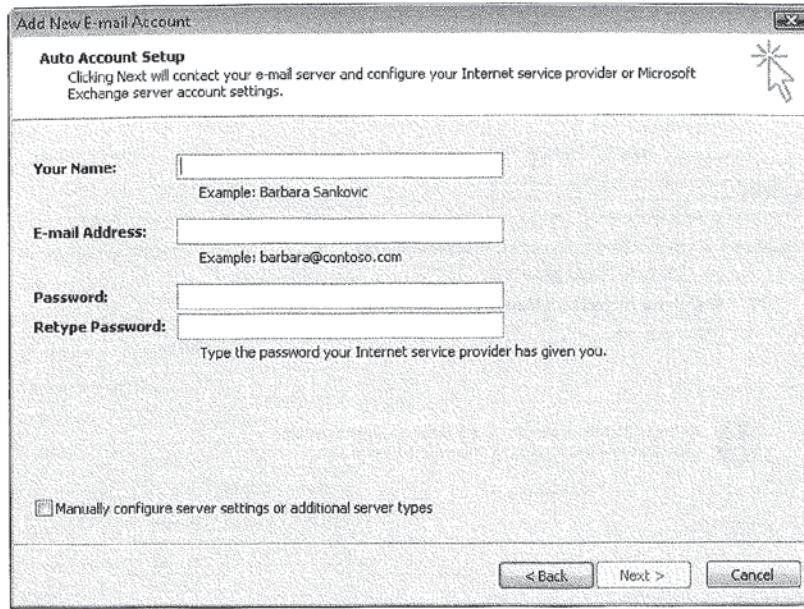
2. In the wizard's first screen, select Microsoft Exchange, POP3, IMAP, or HTTP and then click Next.
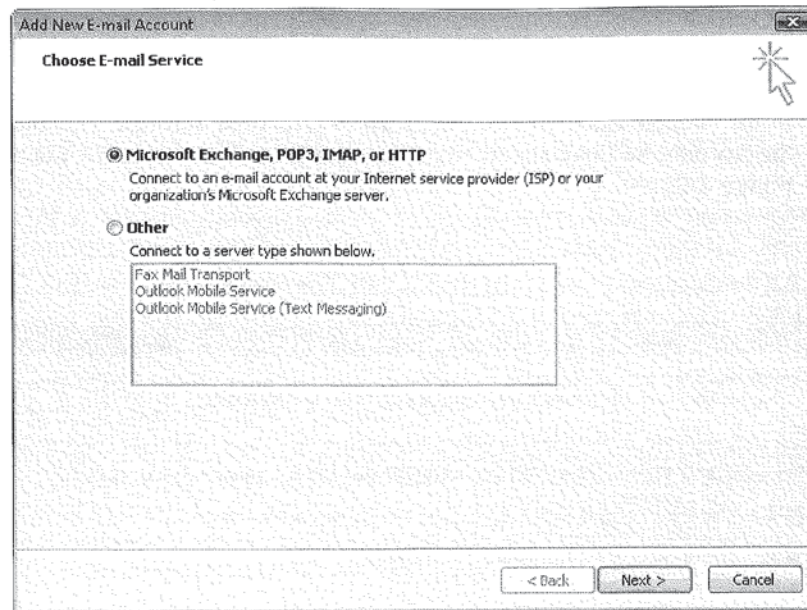
3. In the Auto Account Setup screen that appears, enter Your Name (as you would like it to appear in messages), the E-mail Address of the account you want to set up, and the password.

2

Add New E-mail Account

Auto Account Setup
Clicking Next will contact your e-mail server and configure your Internet service provider or Microsoft Exchange server account settings.

Your Name:
Example: Barbara Sankovic

E-mail Address:
Example: barbara@contoso.com

Password:
Retype Password:
Type the password your Internet service provider has given you.

☐ Manually configure server settings or additional server types

< Back   Next >   Cancel

4. Click Next, and the Auto Account Setup Wizard goes to work. If all goes well, you will see a Congratulations! message in the window and your account will be configured.

If Auto Account Setup can't successfully set up the account, the window displays information about the problem, and if possible, additional steps you can take to try to get a connection. Figure 2-3 shows an example of one such situation. Note that in this case, the wizard offers you the opportunity to try a different approach to get the connection.

If Auto Account Setup is unable to set up this account, you can either attempt to set up the account manually, or contact whatever organization provides the account for help. Oftentimes, all the information you need is available on the organization's website.

Specify E-Mail Connections

Not everyone has a full-time connection to the Internet. The type of connection you have affects how Outlook works with your Internet e-mail account. Which type of connection you have for a particular account may change, depending on circumstances. If you have a notebook computer for example, the machine may be
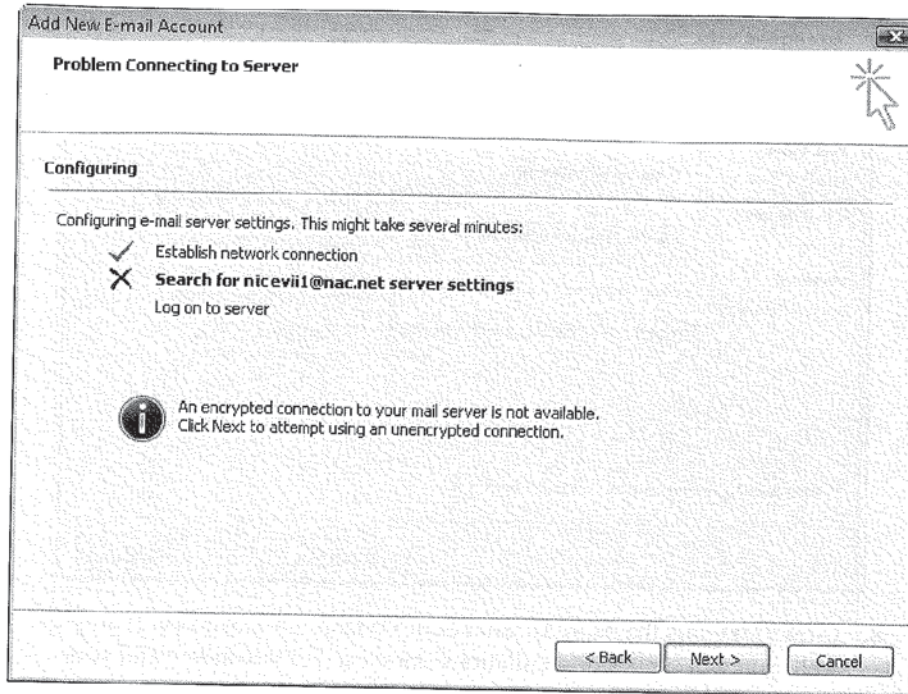
FIGURE 2-3 Auto Account Setup failed to connect, but hasn't given up yet.

connected full-time when you're in the office or near a wireless hotspot, but use a modem connection if not otherwise connected.

You can tell Outlook what kind of connection to use for each e-mail account in the Internet E-Mail Settings dialog box. Follow these steps to specify the connection for each account:

1. In the Outlook main window, choose Tools | Account Settings. This opens the Account Settings dialog box. Click the E-mail tab to see a view like Figure 2-2.

2. Select the account you want to work with, then click Change to open the Change E-mail Account dialog box shown here.

2
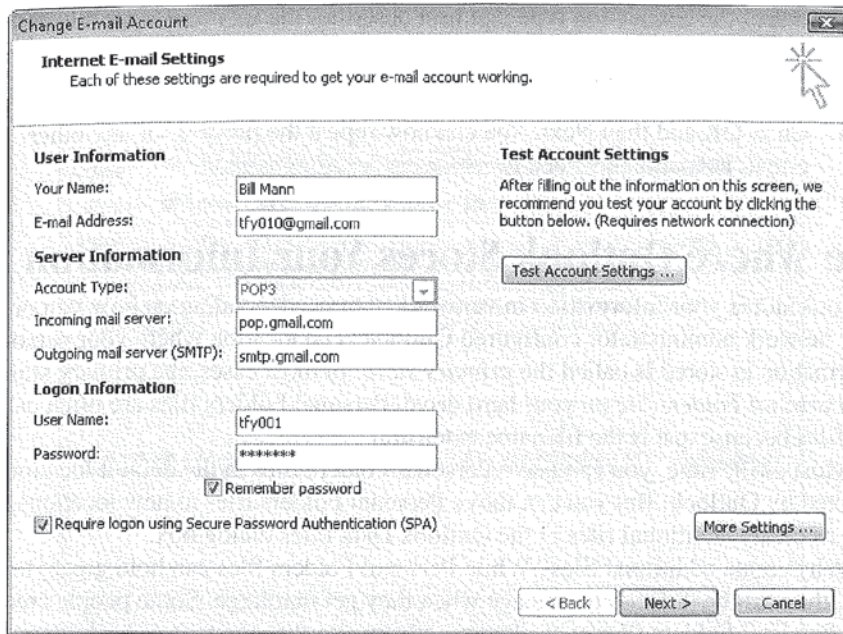
3. Click More Settings to open the Internet E-Mail Settings dialog box. The Connection tab has a collection of connection options.
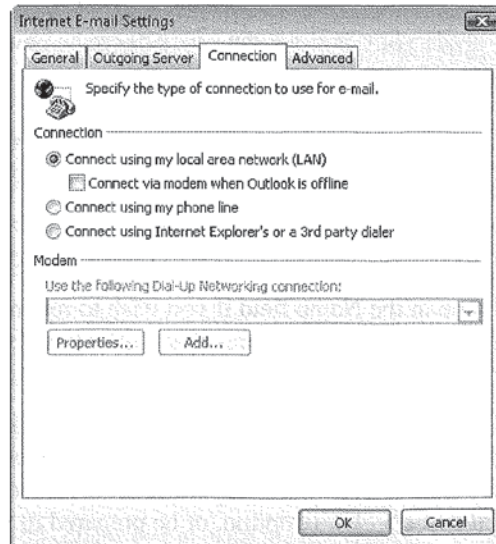
4. Select the connection type that best describes the way you want this account to connect, and if you are using a modem, enter any modem-related information needed.

5. Click OK and then Next. You can now repeat the process for any other e-mail accounts that need it.

Decide Where Outlook Stores Your Information

Outlook stores your information in various locations, depending on how you or your network administrator configured Outlook. The location where your personal information is stored is called the *primary store*. In most cases, the primary store is a *Personal Folders file* on your hard drive. Personal Folders files are often called .pst files because .pst is the filename extension.

Most of the time, you can leave Personal Folders files in the default location selected by Outlook. But you can move Personal Folders files to new locations, as well as create additional files in the Outlook Data Files dialog box.

Why create additional files? While Personal Folders files can hold gigabytes of data, they can be difficult to manage when they get that large. Some people create new Personal Folders files every few months to simplify the task of backing up and maintaining the files.

Work with Your Personal Folders Files

To view information about your Outlook data files or create new files, follow these steps:

1. In the Outlook main window, click File | Data File Management to open the Account Settings dialog box to the Data Files tab, as shown in Figure 2-4.

2. Select the Data File you want to work with, then click Settings to open a Personal Folders dialog box like the one in Figure 2-5 for that data file.

3. Enter a new name in the Name field if you wish to rename this data file. Doing so from this dialog box ensures that Outlook will still be able to find and open the file afterward.

4. Click Change Password to open the Change Password dialog box if you want to assign a password to a data file, or change the existing password. If you do apply a password to the file, either set the Save the Password in Your Password List check box option, or be prepared to manually enter the password whenever Outlook tries to access this data file.

2
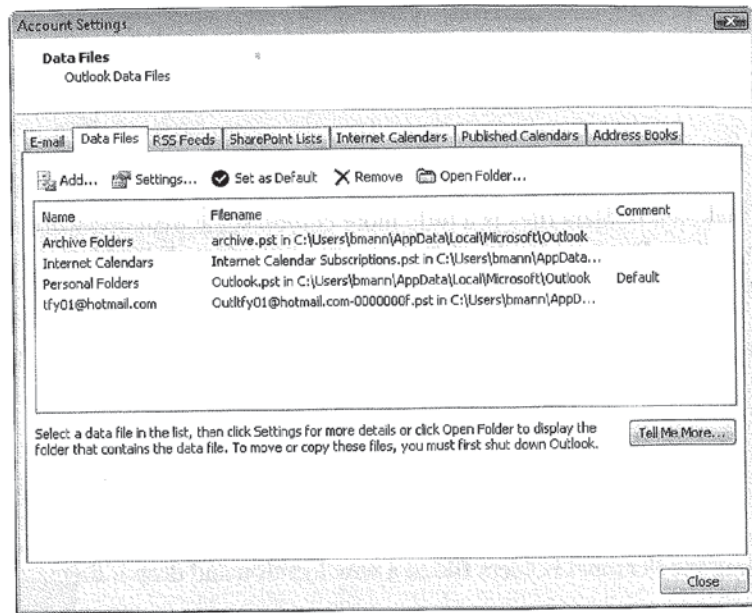
FIGURE 2-4   This is where you can manage Outlook's data files.
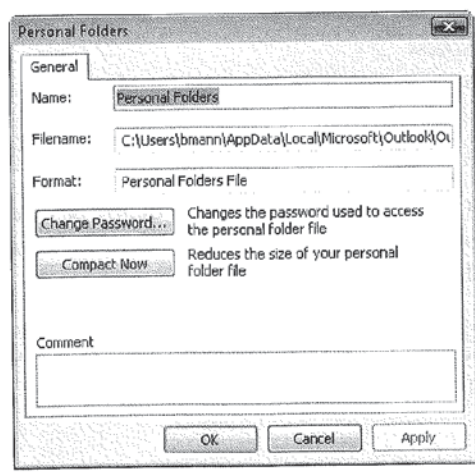
FIGURE 2-5   Use this dialog box to make the few changes you can make to a .PST file itself.

5. Click Compact Now if you want to reduce the size of the data file by compacting (or compressing) it. Doing so every once in a while not only reduces the amount of disk space the file takes up, it also makes using the file more efficient by removing dead space from the file.

Move Personal Folders Files

Moving Personal Folders files is a little more cumbersome than just working with them. To move a Personal Folders file, you start in the Data Files Management dialog box. Follow these steps to move a Personal Folders file:

1. In the Outlook main window, choose File | Data File Management to open the Outlook Data Files dialog box you already saw in Figure 2-4.

2. Select the file you want to move and then click Open Folder.

3. With the folder containing the Personal Folders file you want to move open, close Outlook.

4. Drag the Personal Folders file to a new location and drop it there.

5. Restart Outlook. You'll see a message stating that Outlook cannot find the Personal Folders file. Click OK to continue.
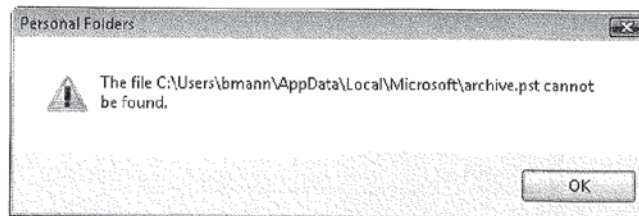
6. In the Create/Open Personal Folders File dialog box that appears (see Figure 2-6), navigate to the new location of the Personal Folders file, select the file, and click the Open button.

7. If Outlook displays a message saying that it is unable to display the folder, ignore the message and click one of the folders in the Navigation pane. Outlook should function normally again.
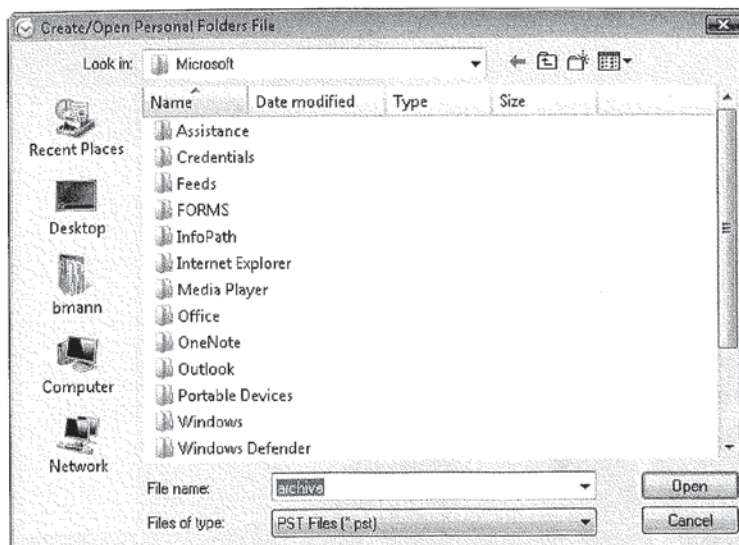
FIGURE 2-6   Use this dialog box to show Outlook where you moved the data file.

CAUTION

This approach won't work for Hotmail accounts, since after you move the data file, Outlook just downloads another copy of the data from the Hotmail account.

Now that Outlook 2007 is installed and ready to go on your computer, it is time to start working with it. And the natural place to start is with sending and receiving e-mail. So turn to Chapter 3, and let's get started.

Part II

Communicate
with the World

Chapter 3

Send and Receive E-Mail

How to...

- Navigate the Mail View
- Compose and Send Messages
- Receive and Reply to Messages
- Format Messages
- Handle Alerts and More

While Outlook 2007 has incredibly powerful personal information management features, and is becoming more and more of an electronic communication hub, its primary use for most people is still sending and receiving e-mail messages. This chapter focuses on exactly that. In it, you'll learn your way around Outlook's Mail view, as well as how to compose, send, receive, and reply to messages.

The chapter also covers topics that are related to the basics of sending and receiving e-mail messages. Desktop alerts, for example, let you know that new messages have arrived when Outlook is not open on your desktop. Outlook messages have lots of flexibility—they can be designated as urgent or sensitive, their delivery can be tracked, and you can even use them to vote on issues!

You'll even learn how to send Internet faxes here. Outlook works smoothly with fax service providers to give you a virtual fax machine. It's another step toward making Outlook your complete digital communications center.

Navigate the Mail View

There are reportedly over 200 million users of Outlook in the world. The vast majority of them spend most of their time in Mail view. Any changes that improve the usability of this view have the potential to save vast amounts of time and effort. In Outlook 2003, Microsoft made significant productivity-enhancing changes to Mail view. For Outlook 2007, the changes are smaller, evolutionary improvements. Figure 3-1 shows the basic Outlook 2007 Mail view.

A Three-Pane View for Better Usability

If you've jumped right over Outlook 2003 to Outlook 2007, you've probably noticed a number of changes, the most obvious being the Outlook bar that used to run down the left side of the Outlook window. It has been replaced by the *Navigation pane,* which combines the functions of the Outlook bar and the old
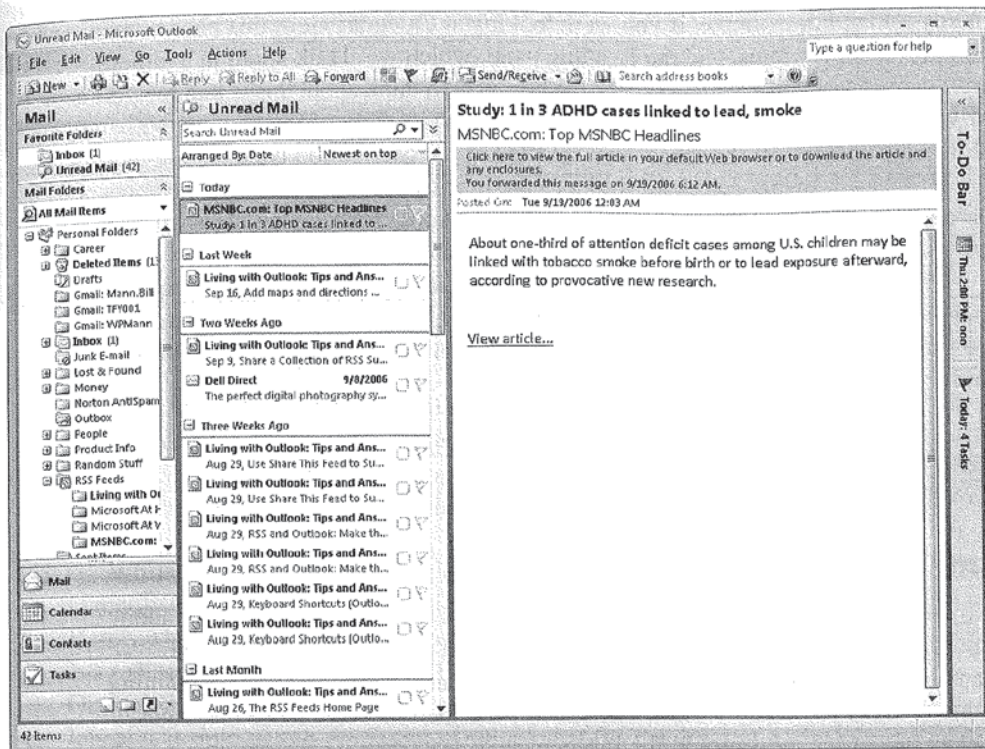
FIGURE 3-1   The Outlook 2007 Mail view sports incremental improvements over the Outlook 2003 Mail view.

Folder List. The four most commonly used Outlook views—Mail, Calendar, Contacts, and Tasks—appear as clickable bars at the bottom of the Navigation pane. Other Outlook views (Notes, Folder List, and Shortcuts) appear as small icons below these. At the top of the Navigation pane (at least while you are in Mail view) is Favorite Folders. It's a place to stash links to the folders you use most often, sort of a speed-dial for Outlook folders.

To the right of the Navigation pane is the Inbox pane. By default, this pane provides a two-line presentation of messages as opposed to the one-line presentation in earlier versions of Outlook. This layout makes it easier to see key information in messages all at once without having to open or preview messages. Messages in the Inbox pane are typically grouped by date, but Outlook provides numerous ways to group messages in this pane (you'll learn about them in Chapter 4).

While we are calling this pane the Inbox pane, in reality it displays the contents of any folder. For example, if you were looking at Calendar view, this pane would contain Calendar items, and the Reading pane (which we'll talk about in a minute) would disappear completely. Perhaps the best way to think about this is that regardless of what you want to call it, the pane to the immediate right of the Navigation pane shows the contents of the folder you selected in the Navigation pane.

If you are viewing an e-mail folder in the Inbox pane, the Reading pane appears next to it on the right. This pane gives you lots of room for viewing messages, and with its vertical orientation, the pane is easy to read.

On the far right of the Mail view is a new addition to Outlook 2007, the To-Do Bar. You'll learn all you need to know about this helpful newcomer in Chapter 8. For now, all you need to know is that it appears on the right side of the Mail view and other Outlook 2007 views.

> TIP *You can reposition the panes and most other elements of Outlook. See Chapter 11 for details.*

Introducing the New Mail View

Now that you have an idea of the basic layout of Outlook views, let's talk about the Mail view in detail. The organization of the Mail view is actually quite sensible. Start in the Navigation pane on the left and select the folder containing the messages you want to view. The Inbox pane then displays those messages. Select one of the messages in the Inbox pane to read it in the Reading pane.

> NOTE *The name of the pane displaying messages changes to match the name of the folder you selected in the Navigation pane.*

You can also make a message appear in its own window instead of the Reading pane. To do this, double-click the message in the Inbox pane. You might want to view messages in windows, for example, if you need to deal with several messages in the Inbox. You may also find that some messages you receive do not display properly in the Reading pane. If a message looks weird, try opening it in its own window. You could go through the Inbox, open all the messages that need attention in their own windows, and handle them at your leisure. This is an approach that many people use. I used to do so myself.

While you can still use this approach, Outlook 2007 gives you much better ways to keep track of messages that need further attention or special handling of any sort.

NOTE *Chapter 4 will show you how to group, color code, flag, and otherwise tag messages for special attention.*

You now have the basic information you need to navigate Mail view. It's pretty straightforward if you follow the left-to-right progression I described earlier. Between here and the end of Chapter 4, we'll cover all the basics of working with your e-mail.

Compose and Send Messages

The tasks of composing and sending e-mail messages work much the same as they did in earlier versions of Outlook. If you're familiar with doing these tasks, are up to speed on the use of the spell-checker, and know the keyboard shortcuts for creating and sending messages, you might think you can skip ahead to the next section, *but don't!* Things are about to get interesting.

If you read Chapter 1, you know what I'm talking about. If not, well, keep reading.

While the main views of Outlook 2007 are recognizably descended from Outlook 2003, when it comes time to compose a message, things are very different. Here's where the Ribbon comes into play. As I described in Chapter 1, the Ribbon is a replacement for the menus and toolbars in Microsoft Office 2007 products. In Outlook 2007, the Ribbon makes an appearance wherever you are entering or editing lots of text. And there's no place in Outlook that fits the description better than in the New Message window you use to compose e-mail messages. Take a look at Figure 3-2 and you'll see what I mean.

Compose a New Message

The first step in composing a new message is to open a blank message window. If you're working in Mail view, you can do this by clicking the New button on the Outlook toolbar. You can also open a blank message window from other views by clicking the little down arrow next to the New button and choosing Mail Message on the drop-down menu.

SHORTCUT *Press CTRL-SHIFT-M to open a new message window no matter where you are in Outlook.*

The New Message window looks something like the one in Figure 3-2. As with most things in Outlook, the details depend on the options you selected and the
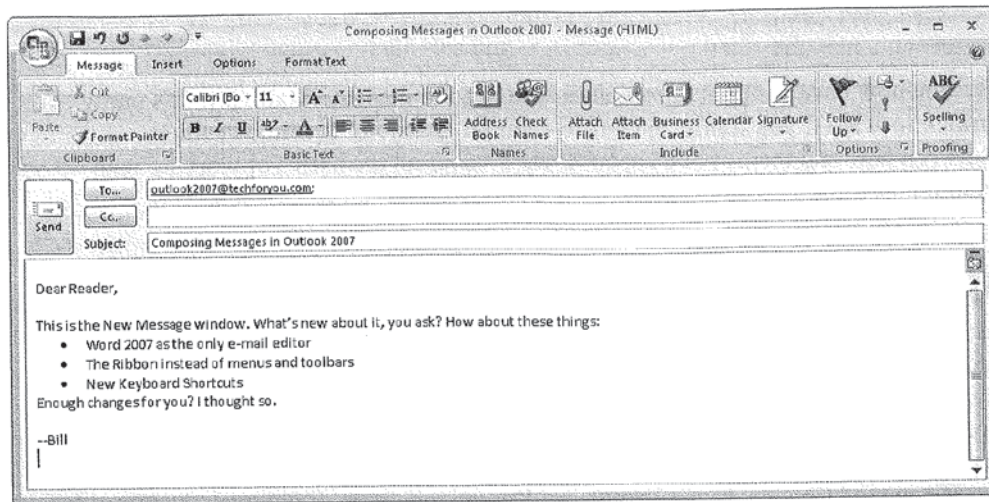
FIGURE 3-2 The New Message window has a very different look and feel now that the Ribbon is here.

ways you customized the user interface. But the default new message window should look very much like the one in the figure.

Starting from just below the Ribbon, you enter the e-mail address of the person to whom you are sending the message in the To field. Click the To button to see the Select Names: Contacts dialog box (shown in Figure 3-3), where you can choose from a list of contacts you can send the message to.

The CC field is for entering the address of anyone you want to receive a copy of the message. People whose addresses appear in the CC field typically are receiving a copy of the message for informational purposes only. You can use the same Select Names: Contacts dialog box to fill in the CC field.

Enter the subject of the message in the Subject field.

You enter the body of your message in the large empty field beneath the Subject field. Because HTML is the default format for messages in Outlook, and Word 2007 is your only e-mail editor, you can use different fonts for text, boldface or italicize text, include images, and enter hyperlinks to web pages. The Message tab of the Ribbon lets you handle all the basic activities involved in creating
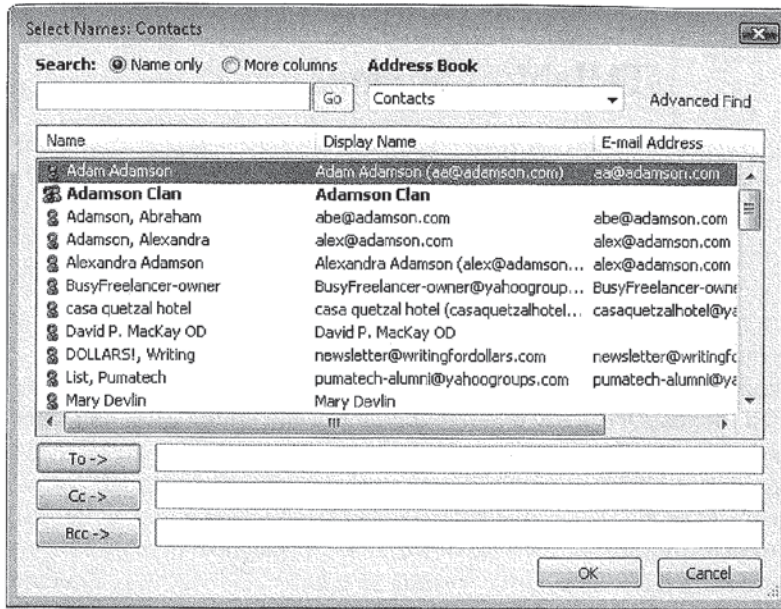
FIGURE 3-3   Use this dialog box to select contacts without having to type their addresses manually.

a message, including standard formatting. The Insert tab of the Ribbon lets you insert all kinds of things into your message, including file attachments. The Format Text tab includes the standard formatting from the Message tab, and adds pretty much any other formatting you might want to do.

When you're done entering text into the message body, I recommend checking your spelling using the spell-checker. Because Outlook 2007 uses Word 2007 as its editor, you get the full spelling- and grammar-checking power of Word applied to your messages. To do this, compose your message as you normally would, and then press F7 to launch the spell-checker. Using these capabilities will help you send cleaner, and likely better-received messages.

SHORTCUT   *You can also launch the spelling and grammar checker by using the ALT, H, s, s keyboard shortcut.*

Did you know?

Not Everyone Will Accept the HTML Mail Format

While Microsoft has made HTML the default format for mail messages in Outlook 2007, not everyone is going to accept this. Some organizations will ban HTML format and require users to work in Plain Text format for mail messages.

One reason for this is to conserve resources. Messages created in HTML format are much larger than the equivalent message created in Plain Text format. While the size of messages may not seem like a big issue to you as an individual user, when you run equipment that has to send and receive and store (often for years to satisfy regulatory requirements) millions of messages, reducing the average size of a message can become an issue.

A bigger issue is security. HTML messages can contain commands for your computer to run. That makes them a target for the people who write the viruses and spyware and other assorted junk that plague e-mail users everywhere these days. So some organizations will ban HTML messages as a way to reduce these risks.

Add a File Attachment to Your Message

E-mail messages can include *attachments* as well as the written material in the body of the message. Attachments are files that get carried along with an e-mail message to its destination. Using attachments, you can e-mail documents, pictures, music files, or any other kind of computer file. Attachments can be a great way to transfer files quickly and efficiently.

Unfortunately, attachments are also a great way to transmit viruses. Many people won't open messages with attachments and delete them automatically. Some companies block messages with attachments from ever even reaching their employees. And some e-mail programs, including Outlook, block certain kinds of attachments from reaching their recipients. Chapter 18 talks about this in more detail. For now, we'll concentrate on how to send attachments and leave the security ramifications for later.

How to ... **Some Useful Keyboard Shortcuts for Formatting Messages**

Here are some keyboard shortcuts that you'll find useful when formatting a message. Remember, to enter a shortcut for the Ribbon, you press and release the ALT key, then press and release each key in the shortcut until the command is activated.

- ALT, H, A, C centers the selected paragraph.

- ALT, H, A, L aligns the selected paragraph flush with the left margin.

- ALT, H, A, U turns the selected paragraphs into an unnumbered (bullet) list.

- ALT, H, A, N turns the selected paragraphs into a numbered list.

- ALT, H, F, F selects the Font list so you can change fonts. Press the DOWN ARROW key to open the list, then navigate it with the UP and DOWN ARROW keys. Press ENTER to select the new font.

- ALT, H, A, I indents the selected paragraph.

- ALT, H, A, O reduces the indentation of the selected paragraph.

- ALT, H, Y, S starts the spelling checker.

- ALT, H, A, F, F opens the Insert File dialog box so you can attach a file to the message.

- ALT, N, F opens the Insert Picture dialog box so you can insert a picture into the body of the message at the current location of the cursor.

For a more complete list of keyboard shortcuts, see Appendix A.

The easiest way to send an attachment with a message is simply to drop a file onto the message. When you do this, Outlook automatically includes the file as an attachment to the message. The following illustration shows a message with an attachment. The attachment is named "BillMann.jpg." It appears in the Attach field, a field that Outlook displays in a message header whenever you attach a file to a message.
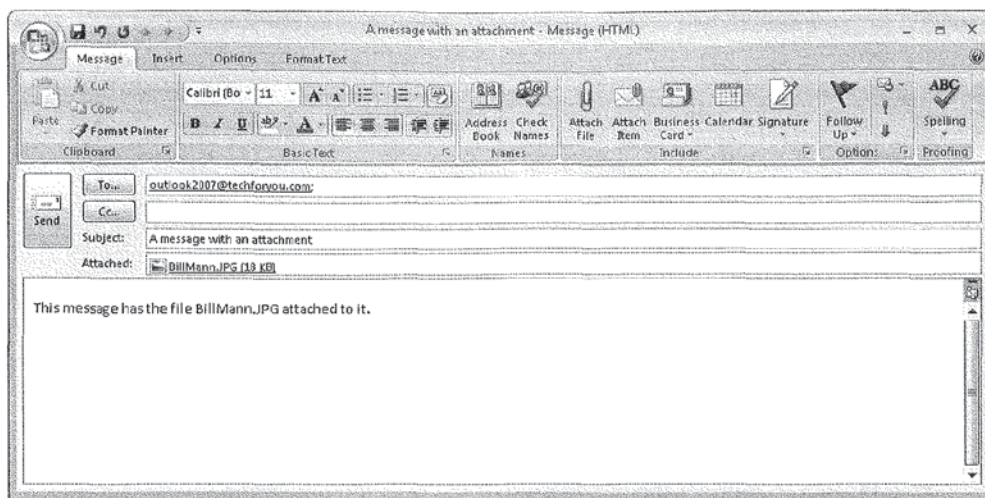
If you look closely at the file icon in the preceding illustration, you can tell that the attachment is an image file. Outlook displays the same kind of file type icon that Windows does.

If the file you want to send is a picture, you can embed it in the body of the message instead of attaching it to the message. To do this, you use the Illustrations commands on the Insert pane of the Ribbon. There you will find commands to insert pictures (graphic files or photos stored on your computer), clip art, diagrams, charts, and simple geometric shapes. The following illustration shows the same file, BillMann.jpg, added to the message as an illustration instead of an attachment.

SHORTCUT *You can use the ALT, N, P keyboard shortcut to open the Insert Picture dialog box, which you use to embed the picture in the body of the message.*
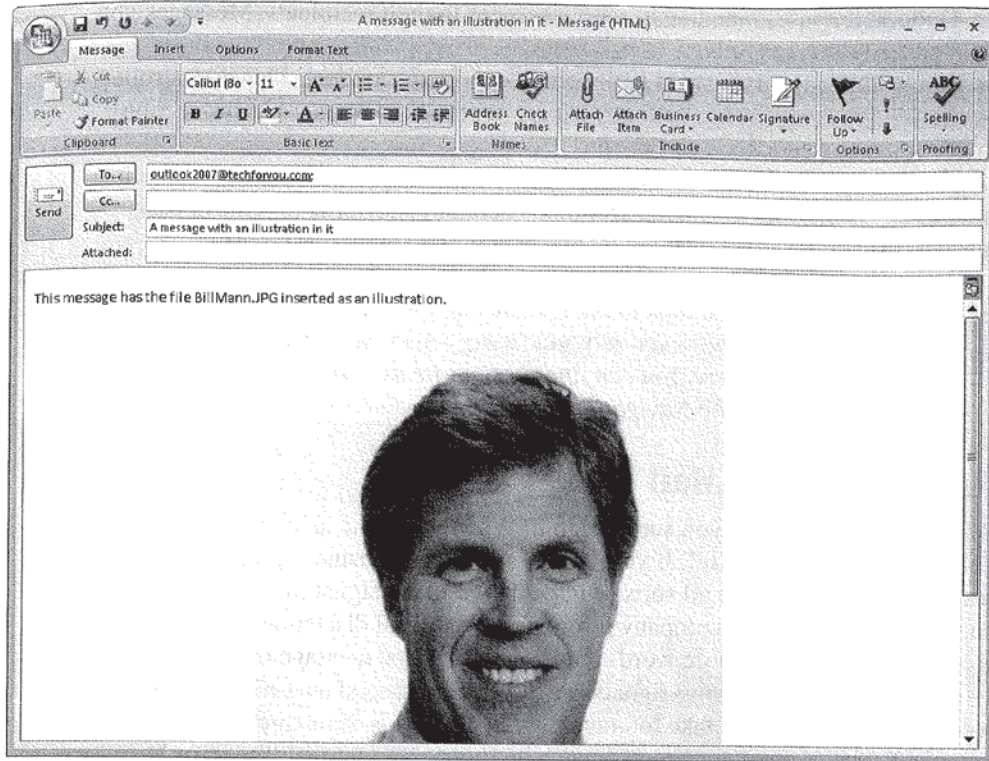
When you use the Illustrations commands, the image gets inserted into the body of the message as a picture, chart, or whatever. You have lots of options for specifying the placement of the illustration, the kinds of borders it has, and so on. If adding illustrations to your messages is interesting to you, I suggest you spend some time experimenting with all the possibilities.

Send Your Message

When you finish composing your message and are done running the spelling- and grammar-checker on it, you're ready to send it. Click the Send button on the Message tabbed page of the Ribbon, or use the ALT-S keyboard shortcut to send the message on its way. Since you will be sending so many messages over time, I strongly urge you to memorize and start using the ALT-S keyboard shortcut to send all your messages.

Outlook doesn't immediately send messages to their recipients. Messages you send go first into the Outbox. After a message arrives there, Outlook may send it on its way immediately or wait until certain conditions are met. This is controlled by the *Send/Receive groups* settings, a topic covered in Chapter 4 in the section titled "Manage Send/Receive Groups."

Eventually, however, Outlook does send the messages in the Outbox to their recipients. As messages are sent, Outlook's default behavior is to remove each message from the Outbox and put a copy of it in the Sent Items folder.

> TIP
> *If you ever want to look at the contents of a message you sent some time ago, and you didn't manually save a copy of it, check the Sent Items folder. It may still be there. You can find the Sent Items folder in the list of folders that appears in the Navigation pane in Mail view.*

Enhance Your E-Mail with Signatures

When you write a letter, you surely sign it. When you write an e-mail message, you should sign that as well. If your e-mail message is business-related, you may well have to include all sorts of information in the signature—not just your contact information, but company information and legal disclaimers, too. I've seen signatures that contain more words than the body of the message does.

Manually creating a long signature every time you send an e-mail message would be crazy. It would take too much work. Outlook's Signature feature lets you create one or more signatures, manually insert them into messages, or have one automatically appear at the end of every message you send. A signature can include your electronic business card.

> TIP
> *Creating and using electronic business cards is covered in Chapter 6.*

Create a Signature

In some ways, creating a signature is the easy part. Figuring out what information it should contain, and when to use each particular signature, can be difficult. Let's get the easy part out of the way and can concentrate on the hard part later.

Follow these steps to create a signature:

1. Open a new mail message window. Click the Signatures icon in the Includes section of the Message tabbed page of the Ribbon (or just use the ALT, H, G, S keyboard shortcut) to open the Signatures and Stationery dialog box shown in Figure 3-4.

3
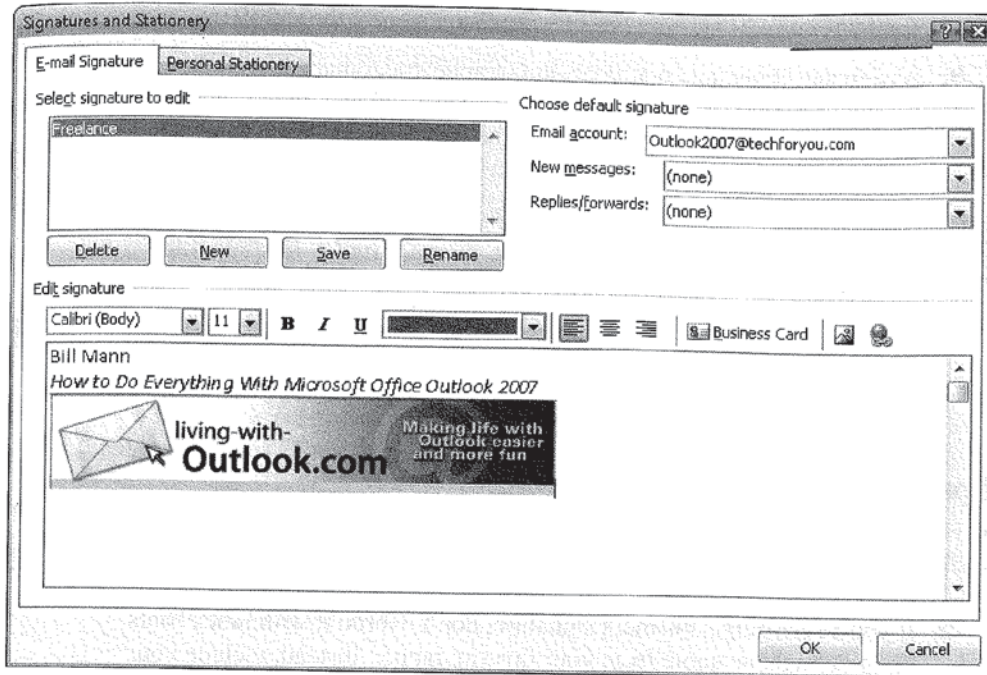
FIGURE 3-4 Signatures and Stationery is where you create and manage your signatures.

2. Click New to create a new signature, or click the name of the signature in the Select signature to edit box to edit an existing signature (I'm editing an existing signature in Figure 3-4).

3. If you are creating a new signature, enter a name for it in the New Signature box that appears.

4. Create your signature in the box at the bottom of the Signatures and Stationery dialog box, exactly as you would like it to appear in your messages. You can paste text into this window if, for example, your company has some standard text you're required to include in all messages. As you can see in Figure 3-4, you can change fonts and colors, add images, insert hyperlinks, and insert a copy of your electronic business card.

5. When you're happy with the signature, click Save. You can create more signatures or edit existing ones by repeating steps 2 through 5.

6. Assign any signatures that you want to appear automatically. In the Choose default signature section of the dialog box, select the e-mail account that will have the automatic signature. In the New messages and Replies/Forwards lists, select the signature you want to appear.

NOTE *In general, I suggest that you not add a signature when you are replying to or forwarding a message. However, the rules and policies of your organization always supersede such suggestions, so you may want to check to see if there is a formal policy regarding e-mail signatures.*

7. When you're done working with signatures, click OK to return to the New Message window you opened in step 1.

Tips for Creating Signatures

Now that you know how to create signatures, here are some guidelines for creating practical and useful ones:

- If you're creating a business signature, don't overdo it with fancy fonts or an outrageous quote from your favorite rapper. Instead, include your contact information and any other text required by your employer.

- If you're creating a signature for personal use, you can be a little more creative in the formatting and content. Just remember that e-mail messages tend to stick around for a while and are often forwarded to other people. Try not to include anything you will regret later.

- Consider the format of the messages that your signatures will be a part of. While by default your messages are in HTML format, if you are corresponding with someone using plain text format, that great signature you created may look very different to this recipient.

TIP *It can make sense to preview a signature by sending yourself a message that includes the signature to see what it looks like.*

Manually Inserting Signatures

You may want to manually control which messages get which signature. Once you have your signatures created, this is really easy to do:

1. In the message window, click the Signature icon in the Includes section of the Messages tabbed page of the Ribbon (or use the ALT, H, G keyboard shortcut) to see a list of available signatures.

2. Select the signature you want to use in this message. I told you it was really easy!

Once you start using Outlook's Signature feature, you'll wonder how you ever got along without it.

Receive and Reply to Messages

Whenever Outlook is online, it checks all of your e-mail accounts at regular intervals for new messages. When it finds new messages, Outlook puts a copy of them in the Inbox. They then appear in the Inbox pane.

NOTE *New messages can also appear in the Unread Mail folder, as well as get moved into various folders based on rules you create. But those are topics for Chapters 10 and 4, respectively. For now, we're concerned with messages in the Inbox.*

Things to Note when Reading Messages

Earlier in the chapter, you learned how to read messages (by clicking or double-clicking them in the Inbox pane). In general, but not always, messages look the same to you as they did to the person who created them. As part of Microsoft's efforts to protect you from e-mail–borne viruses and other nastiness, Outlook doesn't display certain kinds of content. Chapter 14 covers all the details, so for now just be aware that Outlook may block certain images or e-mail attachments.

If a message you receive contains an attachment, the attachment appears as a paperclip in the Inbox, and as an icon in the message window or Preview pane. Double-click the attachment icon to open it. Right-click the attachment icon, then click Save As in the shortcut menu that appears to save the attachment as a file on your hard drive.

Preview Attachments

Previous versions of Outlook allowed you to see the contents of a message in the Preview or Reading pane without opening the message in a separate window. In Outlook 2007, that philosophy has been extended with the Attachment Preview

capability, which allows you to preview message attachments in the Reading pane. By this, I don't mean the ability to see illustrations in the body of messages, which we talked about a few pages ago. I mean the ability to see what's in an attached file, such as a Word document or Excel spreadsheet, without launching Word or Excel and opening the attached file in that program.

Here's how it works: When you are viewing a message that has an attachment, whether in the Reading pane or in its own message window, the Attachment Preview feature looks at the file extension of the attachment and checks to see if Outlook has a viewer for that kind of file. If it does, you can preview the attached file right in the Reading pane or message window.

Why is this good? Primarily because previewing within Outlook is faster and more convenient than launching another application and opening the file in it.

It also feels more intuitive. You want to see what's in the attachment? Just peek inside and give yourself an idea what it is without a lot of fuss. Here's what the header of a message with an attachment looks like:

Preview this Attachment

Bill Mann [bill@techforyou.com]

Sent: Tue 9/19/2006 6:36 AM
To: Bill Mann

Message   Lookout world.doc (30 KB)

Each item that you can view has its own icon. In this case, there are two: one for the message, and one for the attached file. If there were more attachments, there would be more icons. By default, you start out seeing the message.

To view the attachment, click its icon. Initially, Outlook displays a warning message and makes you click a button to see the preview. Clear the check box in the warning message to keep this from happening in the future.

CAUTION   *While active content such as scripts, macros, and ActiveX controls is removed from previews, Microsoft still recommends that you only preview attachments that you have received from trusted sources.*

Once you get past all that, the attachment preview appears in the Reading pane or message window. Right out of the box, Attachment Preview includes viewers for the following kinds of files:

- Outlook 2007 items (Message, Contacts, Notes, and so on)

- Word 2007 documents

- Excel 2007 worksheets

■ PowerPoint 2007 presentations

■ Visio 2007 drawings

■ Common image and text formats

3

NOTE *If the Attachment Preview capability becomes popular, I expect that other companies will create viewers for their own file formats that we'll be able to download and add on to Outlook 2007.*

You do need to remember that what you are seeing is a preview of the attached file. You are not opening the document in Word or Excel or whatever program you would normally use to work with it. This has a couple of ramifications. First, you can't edit the file in any way. You are only viewing the content. Second, the content that you see in the preview may not be the most current content for the file. So if you want to be able to say, "Yep, that looks like the Johnson report to me. I'll deal with it after lunch." A preview is a quick-and-easy way to go. If you want to do something serious with an attachment or the information it contains, you'll need to open it and work with it the old-fashioned way.

Reply to a Message or Forward It

You'll often want to respond to an e-mail message by replying to it or forwarding it to someone else. You can reply to or forward a message that appears in the Reading pane, in its own separate window, or even one in the Inbox pane that you haven't done anything with yet. But first you need to figure out which kind of response you want to make. You can reply to the sender of the message, reply to the sender and everyone else who received the message, or forward the message. Here are some guidelines to follow:

■ If you only want to communicate with the person who sent the message, you want to use Reply.

■ If you want to communicate with everyone who received the message as well as the person who sent it, you want to use Reply to All.

■ If you want to pass the message along to someone who wasn't originally included, you want to use Forward.

■ If you want to reply to people who received the original message as well as pass it along to others, you have to choose. Typically, the easiest thing to do is start out with a Reply to All, then add new people and delete any of the original recipients who you don't want to send this message to.

How you tell Outlook which of these you want to do depends on where the message is. There are three possibilities here:

- If you are working with a message that's in the Inbox pane and not yet visible in the Reading pane, you need to right-click the message and then select the option you want in the shortcut menu that appears.

- If you're responding to a message that's visible in the Reading pane, the buttons you need are on Outlook's toolbar.

- If you're responding to a message that appears in its own window, you need to use the Ribbon. In this case, the three commands you want all appear in the Respond section of the Message tabbed page.

SHORTCUT   *Actually, this is one place where you can still use the keyboard shortcuts from earlier versions of Outlook. You can use these old-style keyboard shortcuts to respond to the active message (the one selected in the Inbox pane or open in the active window): CTRL-R for Reply, CTRL-SHIFT-R for Reply to All, and CTRL-F for Forward.*

When you respond to a message, Outlook opens a new window like the one shown next for your response. In the message shown here, I selected Reply, so Outlook automatically entered the letters RE: (for "reply") at the start of the message subject line, and addressed the message to the person who sent it originally.
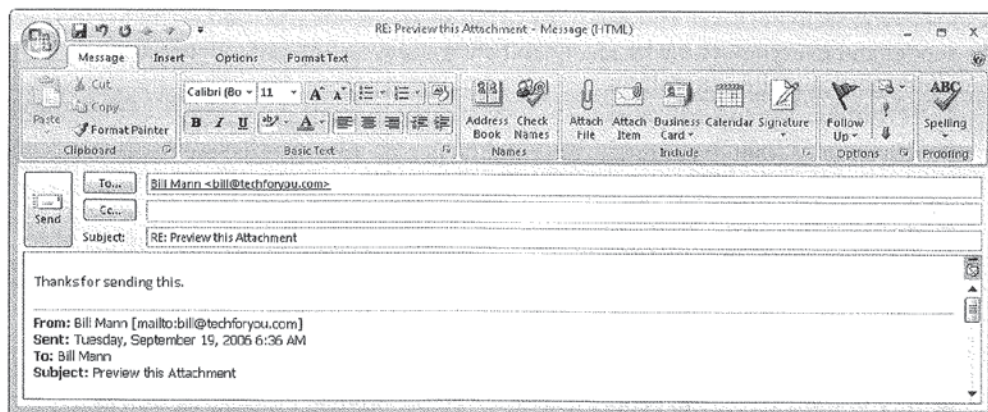
In addition, Outlook included the body of the original message at the bottom of the message window and placed the cursor at the top of the window. Including the original message provides some context for my reply. Now I can easily address the relevant parts of the original message in my response.

> TIP *It is considerate to include only the relevant parts of the message you're responding to in a reply. This is particularly the case when you're responding to a lengthy message.*

Another thing to notice here is that the attachment described in the message doesn't appear in the reply message. Why? This is a nice little feature. Since I am replying to someone who already has the attachment (they sent it to me, after all), Outlook is smart enough not to send them another copy of it. On the other hand, if I were forwarding the message, Outlook *would* include the attachment since the person I'm forwarding it to might not have the attached file.

Format Messages

Quick! What's this section about? What does the title "Format Messages" mean to you? If you are an Outlook veteran, you are probably thinking we're going to talk about whether to compose messages in plain text, Rich Text, or HTML format. If you are newer to Outlook, you are probably thinking that we're going to talk about how to lay out words and illustrations in the body of a message.

Whichever you were thinking, you're right. We need to talk about both of these, and they turn out to be intertwined, so we might as well talk about them together. Ready?

Three Message Formats

With Outlook 2007 using Word 2007 as its editor, you have access to Word's message-formatting capabilities in your messages. While you can't do everything in a message that you can do in a Word document, you can do almost everything. This includes using document templates to format your messages just so.

However, even with Word 2007 as the editor, what you can do to format the content of a message depends on the *message format* you use. The message format determines what kind of information can be contained in a message and how the file itself is constructed. I touched on this briefly in an earlier section when I mentioned that a signature in a plain text message could look different from the same signature in an HTML message. Let's start at the beginning....

Outlook can handle three message formats: plain text, RTF, and HTML. There's a lot of history behind all this, and most of it doesn't matter to us. What does matter to us is that there are people out in the world using each of these formats for their e-mail, and each format has different capabilities. The default message format in Outlook 2007 is HTML. HTML is the basic format of web pages. It has lots of options for formatting the content of messages.

RTF is a format that is used primarily by Microsoft. Like HTML, it has lots of options for formatting the content of messages. Some companies require all messages to be created in RTF format. When you use RTF to send a message to an Internet address (basically any recipient who isn't using Outlook and Microsoft Exchange server), Outlook automatically translates the message to HTML format so it is received properly.

Plain text format is what it sounds like. The plain text message format gives you virtually no capabilities for formatting the content of messages. No fancy lists, no embedded illustrations, no bold or italics, nothing.

Given that HTML is the default message format for Outlook 2007 and it lets you format the content of your messages nicely and is widely supported, it would seem that choosing the message format would be simple. And it usually is. But not always. See the How to "Which E-Mail Format to Use, and How to Switch?" box for more information.

Set Outlook's Default Message Format

To set Outlook's default message format, it's back to our old friend the Mail Format tab:

1. In the main Outlook window, choose Tools | Options to open the Options dialog box.

2. In the Message Format section of the Mail Format tab, select the format you want to use from the Compose in This Message Format list.

3. Click OK.

NOTE *From this point on, new message windows that you open will open in the default format you chose. Message windows that you opened in a different format before changing the default format retain their original format.*

3

How to ...   Which E-Mail Format to Use, and How to Switch?

As we've seen, in most cases HTML is clearly the message format to use. Hopefully, the people you communicate with will be using HTML as well, and you won't have to worry about this. Here are some circumstances where you may want to use a different message format:

- You are replying to a message that didn't use HTML format. In this case you will probably want to reply using the same format as the message to which you're replying. That's because you know the recipient will be able to read it.

- Newsgroup programs (you'll learn about these in Chapter 5) typically don't understand HTML format. Before sending messages to a newsgroup, you should check the group's frequently asked questions (FAQ) file to find out which format to use. If you're still unsure what format to use, start with plain text. That's sure to work.

- When you're sending a message to someone and you don't know what formats their software works with, consider sending your message in plain text format. Better yet, check with them or read their FAQ files to see what message formats they support, then use one of those.

- If your company has set a standard format for e-mail, then, of course, use that.

Set the Format of a Single Message

To change the format for just the message you are working on, go to the Format group of the Options tabbed page of the Ribbon and click the format you want to use.

Format the Contents of Messages

Now that you know about the different message formats, we can talk about formatting the contents of your messages. We won't go into the aesthetics, but will talk about the mechanics of it all.

The simplest case is if your message is in plain text format. All you can really do with it is type. You don't have any of the nice formatting tools the other message formats have, so all you have to work with is numbers, letters, and the other symbols you see on the keyboard. You'll have to show your style in your words because that's all you've got.

If you are using RTF or HTML, you have far more formatting options than we have room to talk about. You'll have to experiment with the possibilities to find the ones that work best for you. I do have three options I want to mention. They are Automatic Formatting, Templates, and the Mini toolbar.

Automatic Formatting

Microsoft Word has long had automatic formatting features. Since Word is now the editor for Outlook, these automatic formatting features are applied to Outlook. To see and change what automatic formatting features are in effect, follow these instructions:

1. In the main Outlook window, choose Tools | Options to open the Options dialog box.

2. In the Editor Options section of the Mail Format tab, click Editor Options.

3. In the Editor Options dialog box, click Proofing, then on the Proofing page, click AutoCorrect Options to see the AutoCorrect dialog box shown in Figure 3-5.

Templates

Microsoft Word allows you to create and more importantly download predesigned document templates, and you can now use those templates in the Outlook 2007 messages you create. You can also download Outlook-specific topics from the Microsoft Office Online website.

Using a Word template is a bit of an ad hoc process. What you want to do is open the template in Word 2007, then cut and paste it into the Outlook message you are working on. Once you have it in your message, you can customize it for your needs.

I think a better source of templates you can use in Outlook 2007 is the Microsoft Office Online website. You can get there by going to the Outlook main window and clicking Help | Microsoft Office Online. This site has a ton of useful stuff for Outlook and all the rest of the Office 2007 products. For right now though,

3
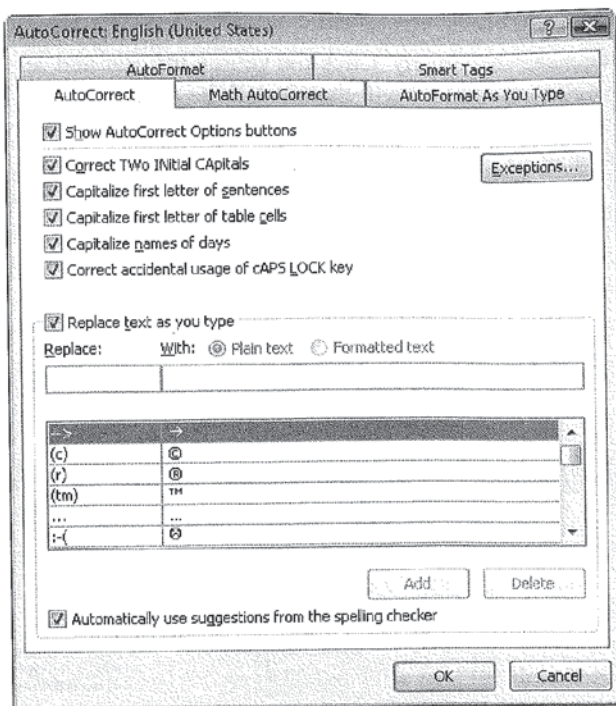
FIGURE 3-5   Come here to view and manage the automatic corrections that are made to your messages.

we're hunting down templates. So click the Templates tab on the Microsoft Office Online home page.

Microsoft and the users of Office 2007 have created a massive collection of templates that are available for free download here. This includes dozens of Outlook 2007 templates. You can find them by browsing through the collections, or by doing a search on Outlook.

Once you find an Outlook 2007 template you want, you can download it. Or more likely you can attempt to download it. To download templates here, you need to install the Microsoft Office Template and Media Control ActiveX Control. This control comes from Microsoft, and ActiveX was created by Microsoft. Nonetheless, because it has been used so frequently to get viruses and other nasty stuff onto computers, Microsoft has decided that ActiveX controls are dangerous and block you from downloading them by default. If you have your web browser

configured with its default settings, it will likely object when you try to download your first template.

Happily, this is easy to remedy. Click the yellow InfoBar and select Run the ActiveX Control. Your computer will then install the ActiveX control. From there, follow the instructions that appear on the screen to complete the process.

The nice thing about downloading Outlook 2007 templates from this site is the way they run automatically. For example, I downloaded the Golden Design Electronic Business Card template. When the download was complete, and the template installed, Outlook started up a New Contact window, with the Golden Design template loaded, and a set of dummy data loaded so I can see what the new contact will look like when I fill it in with real data. Here's what I saw:

I suggest that you visit Microsoft Office Online's Template pages whenever you want to give an Outlook item a little character.

Mini Toolbar

The first time I saw the Mini toolbar, I thought it was some kind of glitch. Instead, it is a helpful little formatting feature.

When you select text in the body of a message or task, you will notice what looks like a ghost of a toolbar. That's the Mini toolbar. It gives you a quick way to work with fonts and other basic formatting features. To use it, rest the mouse pointer on it. The Mini toolbar becomes solid, and you can use it like any other toolbar. The Mini toolbar disappears but remains available as long as the text is selected.

Handle Alerts and More

A *desktop alert* is a message that appears on your desktop to alert you to the arrival of certain Outlook items. The alerts appear when Outlook is minimized. They allow you to see what item has arrived, as well as perform certain actions on items, all without opening the Outlook Inbox.

The following list describes the types of items that can generate desktop alerts and how Outlook displays them:

- **E-mail messages** An e-mail message alert displays the name of the sender, the subject of the message, and the first two lines of the message. If the message is encrypted or digitally signed, the alert will not display the contents. In that case, you'll have to open the message to see what it says.

- **Meeting requests** A meeting request alert displays the name of the sender, the subject of the meeting, its date and time, and its location.

- **Task requests** A task request displays the name of the sender, the subject, and the start date of the task to be assigned.

When it receives items from the Exchange server or from Internet e-mail and the items are destined for the default Inbox, Outlook automatically generates desktop alerts. However, Outlook doesn't automatically generate alerts for items bound for a location other than the default Inbox, nor does it automatically generate alerts for messages that come in through an IMAP or HTTP account. If you want Outlook to generate desktop alerts for these types of items, you need to create rules to do so (Chapter 5 shows you how).

Work with Desktop Alerts

When a desktop alert appears, you can do several things with it. First, you can read it to see what kind of item has arrived. Alerts are designed so you can make a decision as to what to do about them at a glance. That's why they appear for a few seconds only. If you want the alert to remain visible longer, just hover the cursor over it. As long as the cursor is pointing to the alert, it will remain on the screen.
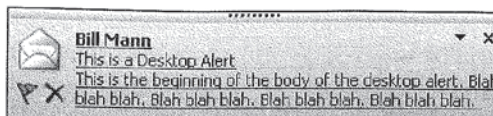
To work with the item that triggered the alert without opening the Outlook Inbox, you just click the down arrow to open the alert's Options list. The list contains a set of options appropriate for the type of alert you are dealing with. You can choose to open the item, flag it, mark it as read, disable future alerts for this type of item, or change desktop alert settings.

NOTE   *Desktop alerts don't appear for messages that don't get stored in the default Outlook Inbox. If you choose to use rules to sort messages into folders when they arrive (topics you'll learn about in Chapter 4), you'll want to include desktop notifications in those rules.*

Customize Your Desktop Alerts

You customize desktop alerts with the Desktop Alert Settings dialog box. You can reach this dialog box from the menu of an open alert or from the Outlook window. Follow these steps to open the Desktop Alerts Settings dialog box and customize your desktop alerts:
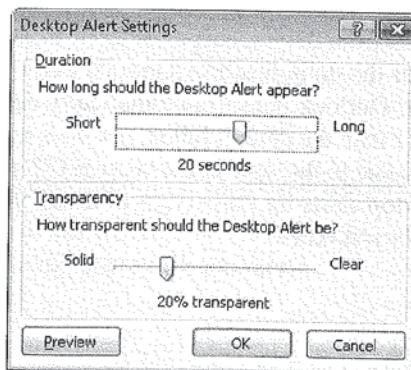
1. On the Outlook menu bar, click Tools | Options | E-Mail Options | Advanced E-Mail Options | Desktop Alert Settings. This opens the Desktop Alert Settings dialog box.

2. Adjust the Duration and Transparency settings to meet your needs. The higher the transparency, the more alerts will blend into the background.

3. To see the results of your changes, click the Preview button to display a dummy alert with the settings you selected.

3

Send and Receive Internet Faxes

Outlook 2007 (and other Microsoft Office System applications) can send faxes using Internet-based fax service providers. These service providers offer additional capabilities beyond those provided by the fax modem software that you may have on your PC. Additional capabilities may include sending faxes to multiple recipients at once, attaching multiple documents to a fax, and composing and sending faxes while your computer is offline (stored in the Outbox and sent the next time Outlook is connected).

Sign Up with a Fax Service Provider

The first time you try to send a fax, Outlook offers you the option to sign up with a fax service provider. Here's how to sign up with a fax service provider:

1. In the main Outlook window, click File | New | Internet Fax. Assuming this is the first time anyone has tried to send an Internet fax on your computer, Outlook pops up the message box prompting you to sign up with a fax service provider.
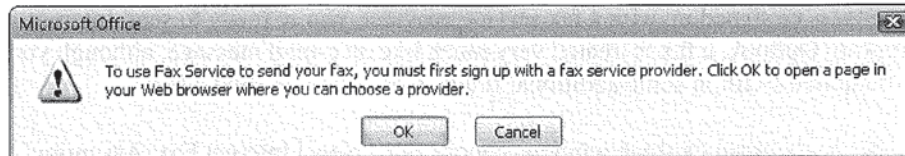
2. Click OK. Outlook opens an Internet Explorer window like the one in Figure 3-6. It offers information about approved fax service providers.

3. Follow the instructions provided by the fax service provider to finish setting up the service.
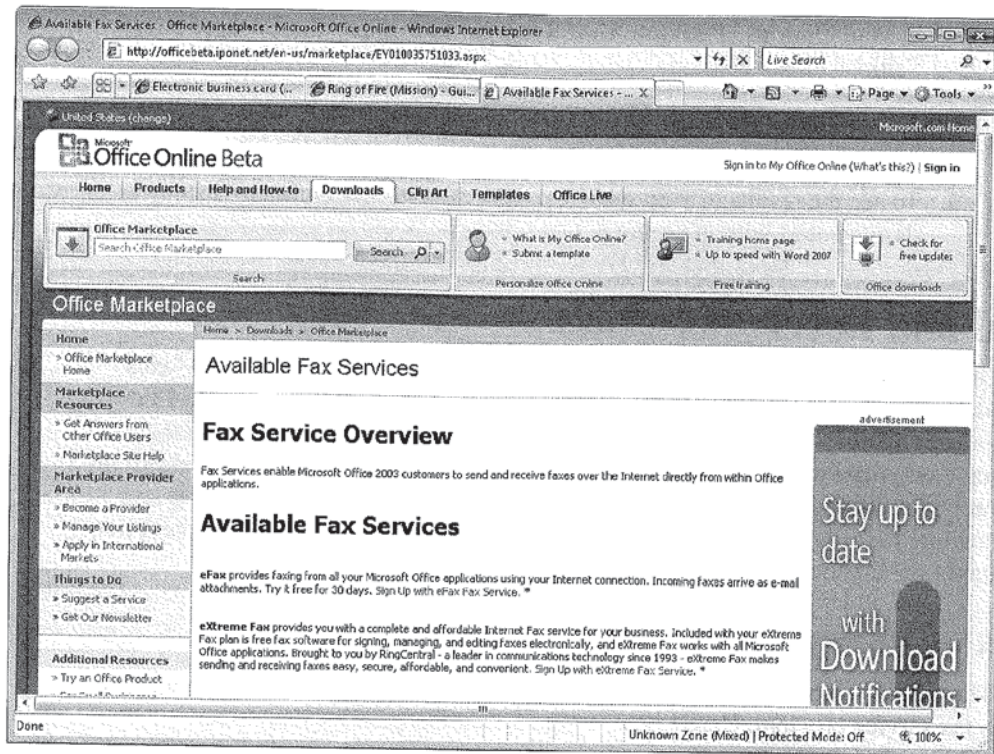
FIGURE 3-6 Select a fax service provider from among the ones on this page.

Send an Internet Fax

After you've signed up with a fax service provider, you're ready to send Internet faxes. In Outlook, a fax is treated very much like an e-mail message, although you are required to fill in some additional fields. Here's how to send a fax:

1. In the main Outlook window, choose File | New | Internet Fax. Assuming you've successfully set up an account with a fax service provider, Outlook opens a fax message window. This window looks very much like any e-mail message window, with a few extra fields.

SHORTCUT *You can jump directly to a new fax window by pressing* CTRL-SHIFT-X.

2. Fill in the Fax Recipient, Fax Number, and Subject fields. The Fax Service pane on the right side of the window provides a set of options that you can apply to your fax.

3. If you wish to have a cover sheet on your fax, make sure that the Use Cover Sheet check box in the Fax Service pane is selected, and fill in the cover sheet fields that appear in the body of the message.

4. If you're attaching documents to the fax, include them in the Attach field in the heading of the message.

5. Click the Send button to transmit the fax.

Receive an Internet Fax

Receiving a fax is incredibly easy. When someone sends a fax to your fax service provider fax number, the service accepts the fax and converts it into an e-mail message. It then sends that message to your Inbox, where it is treated just like any other e-mail message.

The body of the message corresponds to the cover sheet. Any attached documents arrive as attached .tif files (a type of image file) in the Attachments line. Windows and Outlook 2007 both know how to display .tif files, so you can preview the faxed information or open it by double-clicking the attached .tif files.

Chapter 4

Manage Your E-Mail

How to...

- Work with Multiple E-Mail Accounts
- Manage Send/Receive Groups
- Group Messages
- Create Folders to Store Messages
- Automate Mail Handling
- Work with Some Additional E-Mail Features

Among other things, Chapter 2 helped you get Outlook connected to your e-mail account or accounts. Chapter 3 got you started on sending and receiving e-mail messages. This chapter takes you the next step. For many people, the biggest problem with e-mail is how to manage it all. I recently worked with a person who had over *2000* unread messages from who knows how many different accounts, all sitting in her Outlook Inbox. How she keeps track of what she needs to do is beyond me, but she certainly could use some help in managing that mess!

First, we're going to talk about how to work with multiple e-mail accounts. Making sure that you don't accidentally mix messages from various accounts is the first step in managing your mail.

Next, we'll look at Send/Receive groups. One of the benefits of having multiple e-mail accounts is that you can check them on different schedules. Send/Receive groups make this possible.

Speaking of groups, the next topic of discussion is grouping messages. One of the simplest things my friend with the overflowing Inbox could do to start getting control of her mess is to let Outlook group the messages for her. She would at least have a better idea of what's happening, and so will you when you learn to group messages.

The next big topic is automating the way you work with your e-mail by applying rules to sort and filter it. But first, we take a quick look at creating folders in Outlook. After all, what good are rules for sorting your messages into different piles if you don't have anyplace to put the piles once you sort them?

Finally, we wrap up the chapter with a few helpful e-mail features that don't fit neatly into any other section. While we'll talk about e-mail intermittently in the rest of the book, once you finish this chapter, you'll be ready and able to handle most anything you need to do with e-mail in Outlook 2007.

Work with Multiple E-Mail Accounts

Chapter 2 and my Living With Outlook website (http://www.living-with-outlook .com) show you how to configure Outlook to connect to multiple types of e-mail accounts on multiple servers. After you set up these accounts, Outlook automatically receives messages directed to them. But if you're not careful, things can quickly get complicated. For example, you don't want to get your personal e-mail mixed up with your work e-mail. And it would certainly be helpful to control which e-mail account Outlook uses to send or reply to a message.

The engineers that designed Outlook had these kinds of situations in mind. Outlook can send messages using any of your e-mail accounts, and it automatically keeps track of which messages are associated with which accounts. This means you can use Outlook for all your e-mail needs and still avoid embarrassing situations such as sending personal messages to business associates or forwarding confidential corporate messages to friends.

NOTE
While you can manage all your separate e-mail accounts manually, Chapter 5 shows you how to create rules that automatically process incoming messages based on which accounts they came from. For now, we'll concentrate on the things you can do manually.

Send Messages with Multiple Accounts

One of the most important aspects of handling multiple e-mail accounts with a single program is being able to select the account that the program uses to send a message. If a message is going to a friend, you probably want to use one of your personal accounts; if you're writing to your boss, you likely want to use your company e-mail account.

Outlook applies these commonsense rules to determine which account to use when writing a message:

- If you're replying to a message, Outlook assumes you want to reply using the same account to which the original message was sent.

- If you're creating a message from scratch, Outlook assumes you want to use your default account. Unless you've changed it, your default account is the first e-mail account you set up with Outlook on your computer. (See the "How to Change Your Default E-Mail Account" box to find out which account is your default account and change it, if necessary.)

How to ... Change Your Default E-Mail Account

To find out which e-mail account is your default e-mail account and change it if necessary, follow these steps:

1. On the Outlook main menu, click Tools | Account Settings to open the E-Mail Accounts dialog box.

2. On the E-mail tabbed page, look at the list of e-mail accounts. All your available e-mail accounts appear in this list. Your default account will have the text "(send from this account by default)" in its Type field.

3. If you want to change the default account, select the account you want to be the new default account and click the Set As Default button.

4. Click Close when you're done.

What if you don't want to use the default account to send a message? Changing the e-mail account Outlook uses to send a specific message is even easier than changing the default account. Before you send the message, click the Account button (below the Send button) in the Message window. This opens a menu of available e-mail accounts. A check mark appears to the left of the one Outlook is planning to use to send the message. Click the name of the account you want Outlook to use, or press the corresponding number on the keyboard. Outlook uses the account you selected when it sends the message.

Receive Messages from Multiple Accounts

Normally, Outlook checks each of your e-mail accounts one after the other. If you have a broadband (high-speed, always-on) Internet connection, you probably

don't need to worry about how long it takes for Outlook to check all your e-mail accounts or how frequently it checks them. But there are two particular situations when you do care: when you have dial-up access and when you are mobile.

With a dial-up connection, the issue is time. If Outlook spends 5 minutes online checking a bunch of e-mail accounts, your phone line will be tied up for that whole time. Plus, while Outlook is chugging away doing that, you can't do anything else with Outlook.

If you are mobile, we're talking time and money and power. If you're sitting in the conference room with the big boss and you're running Outlook on your laptop, you've probably got a Wi-Fi connection and a power outlet nearby, so life is good. But in other situations, any or all of the above could come into play. Here are some scenarios to ponder:

- You're hanging out at your local coffee shop using a T-Mobile hotspot to connect. You are probably paying by the hour, so time spent waiting for Outlook to check your more obscure e-mail accounts is wasted money.

- It's a beautiful day, and you're sitting in the park taking advantage of your super-deluxe mobile broadband account. It isn't costing you any extra money for Outlook to check your messages (you are paying for unlimited access after all), but man, it sure sucks up battery power when that wireless modem is active. The less time it takes to check your mail, the longer you can hang in the park before your battery dies.

- You don't have one of those all-you-can-eat mobile broadband accounts. Instead, you have one of those phones that doubles as a wireless modem. It works great, but when Outlook checks your mail, it takes a long time, burns up your phone's battery, uses up minutes, uses up another chunk of that 5 megabytes per month download limit on your account, and keeps your significant other from getting through on the phone. Time, money, power, and romance all going down the drain so Outlook can check that one old e-mail account you haven't used in months.

Now that you've seen the true costs, if you are a dial-up or mobile user, you might want to manage Outlook's schedule for checking your accounts. And if you get distracted by every new message that arrives, you might want to limit how often Outlook checks for new mail, even if—particularly if—you have a high-speed, always-on connection.

Outlook uses *Send/Receive groups* to determine when accounts get checked for new mail. Send/Receive groups are collections of accounts and folders that you can apply tasks to on a schedule you define. For example, you might define a Send/Receive group that automatically sends and receives messages every 3 minutes when your computer is online, but doesn't try to send or receive messages at all when your computer is offline.

One thing to remember is that an account can be in more than one Send/Receive group. This actually makes a lot of sense, since it allows you much greater flexibility when you're trying to manage your accounts. If you're just working with a desktop PC that has a broadband Internet connection, you'll do just fine with a single Send/Receive group using the default options.

But if you're working with a notebook or a Tablet PC that is sometimes online and sometimes off, that sometimes uses a dial-up connection, sometimes connects through your mobile phone, and sometimes uses broadband, you will probably be better off with a few different groups that you can use in different situations. The following sections show you how to define and manage groups, including how to tell your computer whether it is online or offline.

Manage Send/Receive Groups

Outlook automatically creates a Send/Receive group named All Accounts, which, not surprisingly, contains all your accounts. The All Accounts group holds one set of default settings for when your computer is online and another for when it is offline. You can adjust these settings using the Send/Receive Groups dialog box shown in Figure 4-1. (The figure shows only the default All Accounts group, which is all most people, including me, normally need).

Follow these steps to manage the All Accounts group or any other Send/Receive groups you create:

1. On the Outlook menu bar, click Tools | Send/Receive | Send/Receive Settings | Define Send/Receive Groups. This opens the Send/Receive Groups dialog box.

SHORTCUT *You can also press CTRL-ALT-S to open the Send/Receive Groups dialog box.*

2. Select the Send/Receive group you want to work on.
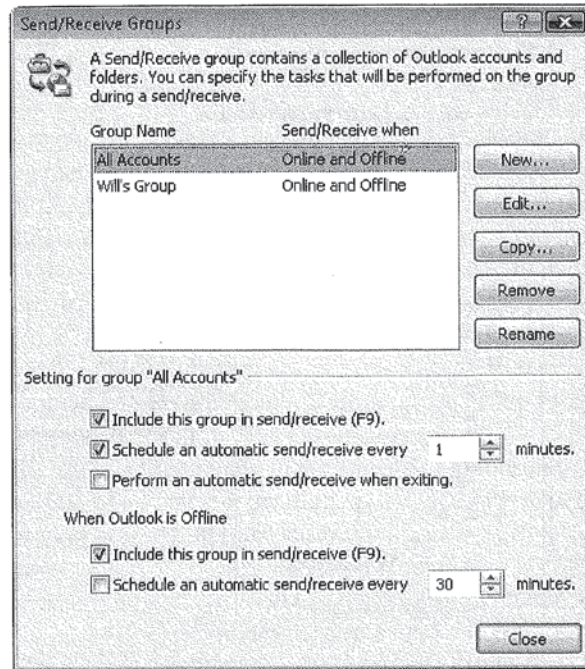
FIGURE 4-1   Control how Outlook checks your mail with the Send/Receive Groups dialog box.

3. If you want to control when Outlook sends and receives messages in this group, use the Setting For Group section at the bottom of this dialog box. As Figure 4-1 shows, you can separately control how frequently Outlook sends and receives message depending on whether it is online or offline.

4. If you want to change the accounts that are included in a group or specify the tasks that will occur for a group, click the Edit button. This opens another dialog box, as shown in Figure 4-2. This dialog box works a little differently than the typical Windows dialog box. See the "How to Edit Send/Receive Group Settings" box for more information.
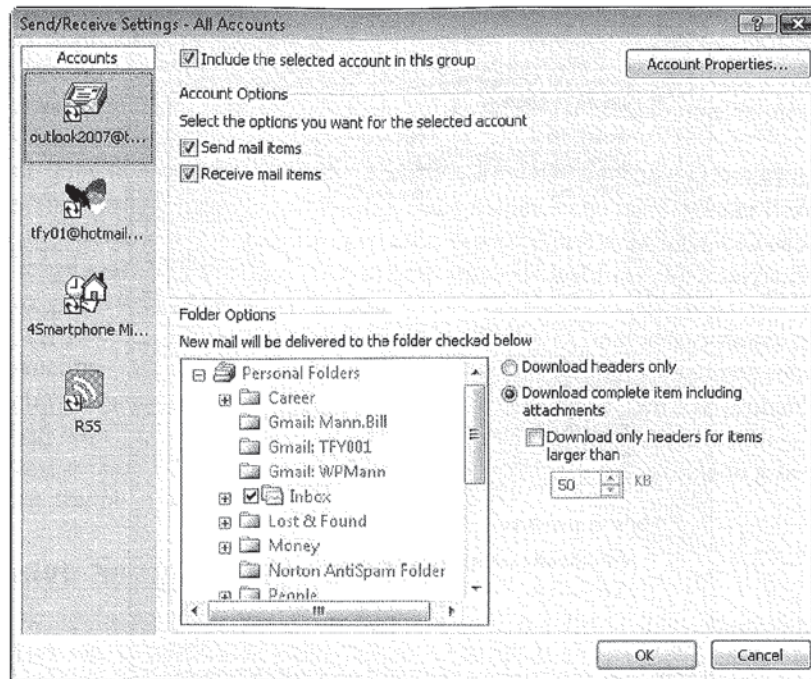
FIGURE 4-2 Use this unusual-looking dialog box to control the settings for a Send/Receive group.

Keep in mind that any settings you change in this dialog box only apply when this Send/Receive group is active. One account can appear in multiple Send/Receive groups and can have different options set in each group without any conflicts.

Define a New Send/Receive Group

The process for defining a new Send/Receive group starts in the Send/Receive Groups dialog box:

1. On the Outlook menu bar, click Tools | Send/Receive | Send/Receive Settings | Define Send/Receive Groups (or press CTRL-ALT-S). This opens the Send/Receive Groups dialog box (refer to Figure 4-1).

How to ...   **Edit Send/Receive Group Settings**

You edit the options for accounts and folders in a particular Send/Receive group by using the dialog box shown in Figure 4-3. The Accounts list on the left side of the dialog box shows all of your defined accounts, including Internet Calendars and RSS feeds, two types that are new in Outlook 2007. The options in the rest of the dialog box pertain specifically to an account within this Send/Receive group. To edit the account options, select the account you want to work with in the Accounts list and make any necessary changes in the rest of the dialog box.

You can remove an account from a Send/Receive group by clearing the Include the Selected Account in This Group check box.

The specific options that appear in the Account Options and Folder Options sections of the dialog box vary, depending on the type of e-mail account you've selected in the Accounts list. In most cases, you'll do best if you just leave all the default values.

If you're unsure which icons in the Accounts list represent which e-mail accounts (perhaps you didn't use descriptive names for your accounts), select the account in question and then click the Accounts Properties button. This opens an Internet E-Mail Settings dialog box with all the settings for the selected account.

2. Click the New button to open the Send/Receive Group Name dialog box:
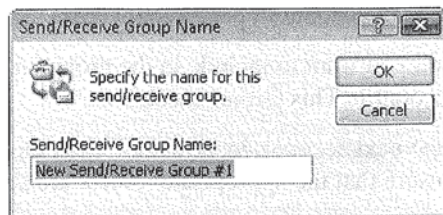
3. Enter the name of the new group and click OK. A Send/Receive Settings dialog box appears for the new group. It will look like the one in Figure 4-3, with your specific e-mail accounts appearing in the Accounts column on the left. The new
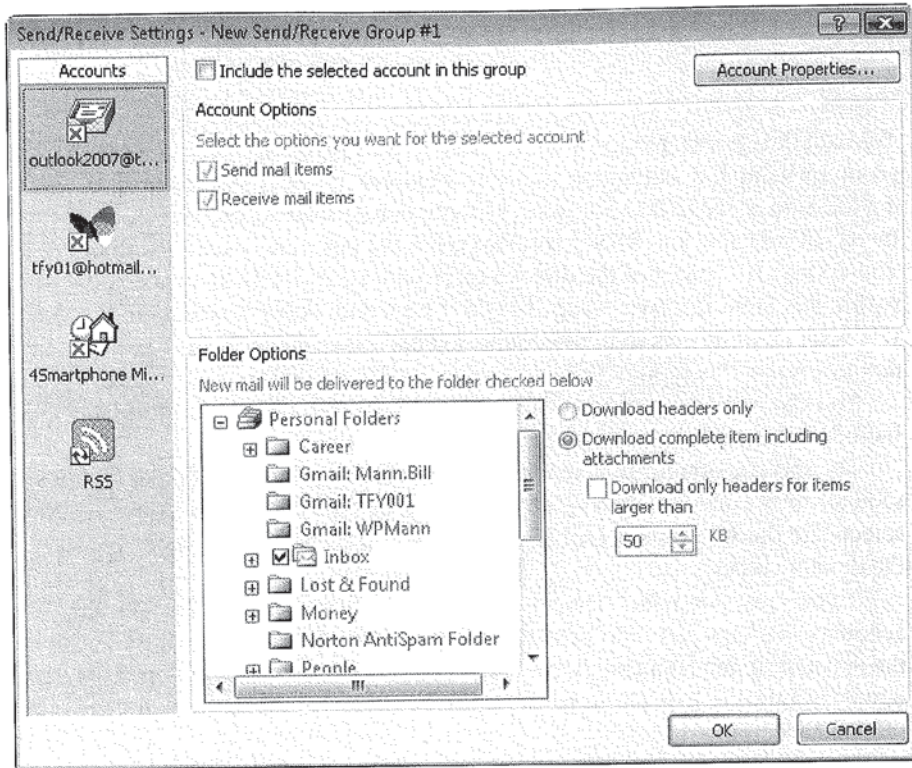
FIGURE 4-3 Use this dialog box to set up Send/Receive groups.

group starts out with no accounts in it, as indicated by the little red *X* in the icons for each e-mail account in the Accounts list.

4. Select an account you want to include in the group and then set the Include the Selected Account in This Group check box.

5. Before adding the next account, look in the Folder Options section of the dialog box to ensure that the appropriate folders are selected.

6. When you're done configuring accounts, click OK. Your new Send/Receive group appears in the group list at the top of the Send/Receive Groups dialog box.

7. Check the online and offline settings for the new group at the bottom of the dialog box, and click the Close button to put the changes into effect.

In addition to the settings you control using the Send/Receive Groups dialog box, Outlook automatically takes certain actions when it is online. For Exchange, IMAP, and HTTP (such as Hotmail) e-mail accounts, Outlook sends and receives messages immediately. For POP3 accounts, it sends messages immediately only if you select the Send Immediately When Connected check box on the Mail Setup tab of the Outlook Options dialog box, as shown in Figure 4-4. To reach this tab, choose Tools | Options and select the Mail Setup tab. The Send Immediately When Connected check box is in the Send/Receive section of the dialog box.
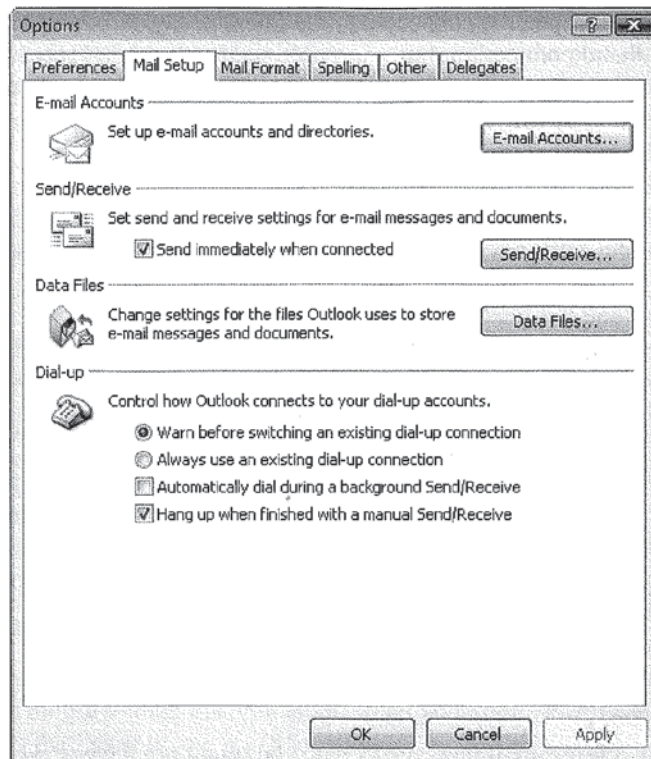
FIGURE 4-4   Tell Outlook to send POP3 messages immediately in this dialog box.

Tell Outlook Whether It Is Online or Offline

The idea that you need to tell Outlook whether it is online or not seems very strange at first. But it really makes sense, particularly if you are a mobile worker. You may want to work in Outlook without having a live connection to the nearest Wi-Fi access point or burning connect time and battery power to link to a wide-area connection while reading that long, convoluted message from the boss.

Or consider the situation of someone who uses a dial-up modem to connect to the Internet. What state is their computer in when the modem is connected to the phone line but it hasn't yet dialed out to their ISP? Their computer is offline, despite being physically connected to the wires and networks that lead to their ISP.

What if your computer is connected to the Internet, say, through a cable modem or other broadband connection, but you don't want to send and receive messages right now? Technically, your computer is online because it is connected to the Internet through your ISP, but you want it to behave as if it isn't online and can't send or receive messages.

And what if you're using a dial-up connection on a trip? Connecting to your ISP from a hotel room will usually entail long-distance charges plus all sorts of surcharges for the calls you make. In this situation, do you want Outlook making calls every 5 or 10 minutes to check for e-mail?

So "online" and "offline" turn out to be concepts that are a little more subjective than they appear at first glance. Add to this the potential technical difficulties of figuring out whether a computer is physically connected or not, and it makes sense for online or offline to be something that the user, not the computer, controls.

Now that you know why the online-offline issue has come up, you're probably wondering how you tell Outlook whether it's online or offline. It's quite easy. In the main Outlook window choose File | Work Offline or File | Work Online. If Outlook is offline, there is a check mark next to the Work Offline menu option. If Outlook is online, there is no check mark. Each time you select the Work Offline option, it switches state between online and offline.

Group Messages

If you only get a few e-mail messages a day, you might not have to worry about grouping or sorting them. You can just scan the Inbox until you find the message you are interested in. For most Outlook users, however, that approach is totally inadequate. According to one study, the average e-mail user gets many thousands of messages a year. Heck, lots of people get 50, 100, or even more messages a day.

Anybody who gets that many messages can surely use help in sorting and grouping them.

Outlook 2007 helps you out by giving you lots of ways to group messages. By default, Outlook automatically arranges messages in the Inbox pane by date. All the messages that arrive today are part of one group, and all those that arrived yesterday are part of another. Continuing that pattern for every message you receive would help somewhat, but the simple-minded approach would quickly lose value. Having a separate group for today, yesterday, and the day before is helpful. Having separate groups for three weeks ago last Wednesday and three weeks ago last Thursday isn't so helpful.

Outlook employs commonsense rules for grouping messages more like you or I would. After a week has passed, Outlook places the previous week's messages in one group, messages from the week before that in another, the previous month's messages in a third, and so on. Outlook's intelligent grouping system groups messages the way human beings would do it.

Did you know?

Groups Can Act Like Outlook Items?

Message groups are more than just abstract concepts. You can treat each group as if it were an Outlook item. You can open and close groups, mark all the messages within groups as read or unread, and even delete an entire group at once. Here are some tips to keep in mind:

- To open or close a group, double-click its name in the Inbox pane or folder.

- To move a group, select the group's name and drag it to the destination. The mouse pointer changes shape to let you know whether you can drop the group in any given location.

- To perform other actions on a group, right-click the group's name and select the action on the shortcut menu.

Select a Grouping Method

Outlook 2007 offers 13 predefined ways to group messages, as well as a way to create your own custom groupings. You select a grouping method by clicking the Arranged By bar at the top of the Inbox pane. This opens the Arranged By menu:
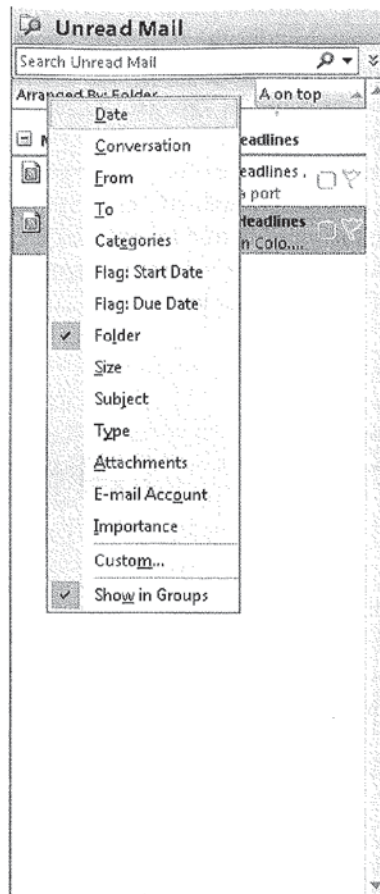
Click a grouping method to select it. A check mark is visible next to the current method. Control whether Outlook groups messages at all by clicking the Show in Groups option in this menu.

Group Messages by Conversation

One grouping method that has the potential to change the way you work with Outlook is called Arrange by Conversation. This arrangement is explicitly designed to help you read e-mail messages that are part of a *conversation*, an ongoing thread of messages related to a particular topic.

When you tell Outlook to arrange messages by conversation, it creates groups in the Inbox pane that consist of all the messages in a particular thread. Each thread consists of an initial message, along with all the preceding replies by all parties to the conversation. Outlook indents messages to indicate who replied to whom during a conversation.

4

> **TIP** *When arranging messages by conversation, Outlook treats each message as if it were part of a conversation, even if it has no replies.*

When you look at the Inbox pane while Outlook 2007 is grouping messages by conversation, you typically just see the most recent message in the conversation. If there are replies that go with a particular message and aren't visible, the message subject in the Inbox pane has a tiny button with a down arrow. Click the down arrow to see the rest of the messages in the conversation. Similarly, if all the messages of a conversation are visible, Outlook displays a tiny button with an up arrow next to the subject of the conversation. Click that to hide the messages. The following illustration shows a portion of the Inbox pane with Arrange by Conversation selected.
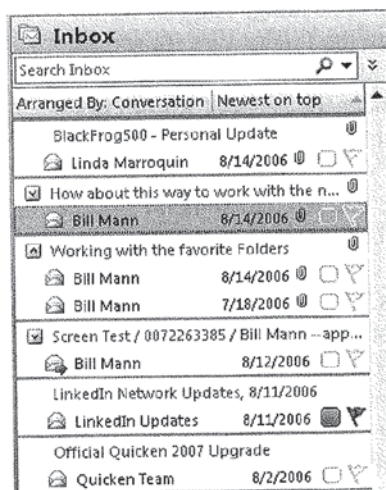
Outlook does something to make the conversation arrangement even more useful. When a new message arrives in a conversation, Outlook automatically moves that conversation to the top of the Inbox pane.

NOTE *Moving the newest conversation to the top of the Inbox pane is the default behavior. If you prefer to work the other way around and place the newest message at the bottom, click the Newest on Top bar in the upper-right corner of the Inbox pane to switch it to Oldest on Top.*

Because all the messages in a conversation have the same subject, Outlook only displays the subject once. This way, Outlook can fit far more messages in the given space.

If you conduct discussions by e-mail, you'll find the Arrange by Conversation option incredibly useful. I encourage you to give it a try.

Create Folders to Store Messages

In the next section we're going to talk about automating the handling of your messages. One of the most common tasks to automate is sorting messages. Before you can sort them effectively, you need to have places to put them. So we need to talk about folders first.

Outlook comes with a set of folders, and you can add more. You can see the set of mail folders in the Navigation pane under the Mail Folders heading. You can see *all* your Outlook folder if you open the Folder List. To see the Folder List, click Go | Folder List. The Folder List appears in the Navigation pane under the heading All Folders.

The preceding illustration includes a lot of folders that don't come with Outlook. I added them to help me keep organized. You may have noticed that some of the folders, such as Inbox, have numbers in brackets to the right of their names. The numbers reflect the number of unread messages in those folders.

You may also have noticed that the Career folder has subfolders underneath it. Outlook folders typically appear under the Personal Folders file that you can see at the top of the All Folders list. You can organize folders in Outlook just as you would in Windows Explorer.
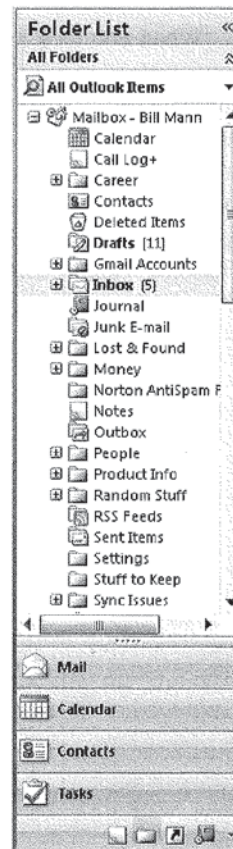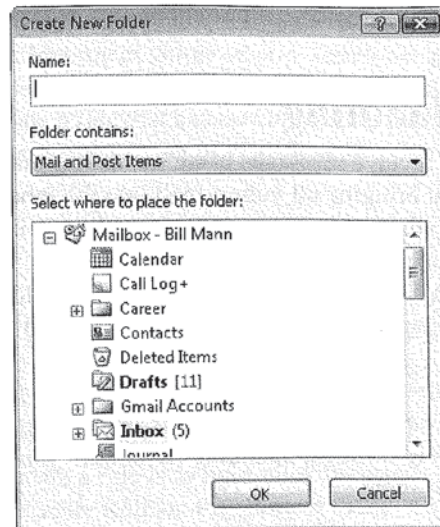
FIGURE 4-5   Creating a new folder in Outlook requires you to consider a few options.

So how do you add your own folders to Outlook? Click File | New Folder to open the Create New Folder dialog box. Figure 4-5 shows this small, but information-packed dialog box.

Enter the folder's name in the Name box. Give it a short, yet descriptive name so you can know what's in the folder at a glance.

The Folder Contains list lets you specify the kind of Outlook items you will store in the folder. You will learn more about the different types of items throughout the book. For now, know that Outlook will offer you an option that is appropriate for the view you are in now. For example, I created Figure 4-5 while Outlook was in a Mail view, so the Create New Folder dialog box assumes I will want to store mail in this folder.

All of your existing folders appear in the Select Where to Place the Folder list. Your new folder will become a subfolder of whichever existing folder you select in this list. When you click OK, the new folder is created and placed in the location you selected. If there is more than one folder in that location, Outlook displays them alphabetically in the Folder List and any other lists that show your folders.

This is really all you need to know about folders right now.

Automate Mail Handling

Being able to send and receive messages using multiple e-mail accounts is one of Outlook's strengths, but bringing all your e-mail into the Inbox exacerbates the problem of handling it all. You don't want to worry about mixing up personal and business e-mail, and you certainly don't want to spend even more time sorting and arranging messages. To help you handle all that e-mail, Outlook lets you automate much of your message handling through the use of rules and the Rules Wizard.

NOTE *Another important way to use rules is in the seemingly endless battle against junk e-mail, commonly known as spam. Chapter 14 covers security issues when using Outlook, including techniques you can use to protect yourself against spam.*

If e-mail is a regular part of your personal and work life, you probably get dozens, even hundreds of messages each day. Even if you have a great organizational system set up, manually sorting so many messages into the right places can take up much of your day. Instead of wasting time manually sorting messages, you can set up rules that deal with the most common messages you receive, and let Outlook do most of the sorting and filing for you.

TIP *Rules are especially useful when combined with search folders. The combination lets you store each message in a single folder, yet still have access to it in multiple places. Chapter 10 is dedicated to the powerful search folders feature.*

Here are some examples of what rules can do:

- Move or copy messages to an Outlook folder
- Flag messages for follow-up
- Delete messages or entire conversations
- Display a message or play a sound when a message arrives
- Send an alert to a mobile device

One common use of rules is to automatically sort incoming messages. You can create rules that sort all messages from friends into a Personal folder or organize work-related messages by project. Suppose you sometimes get urgent messages from your boss, complete with all sorts of dire consequences if you don't respond quickly. You could create a rule that causes Outlook to alert you whenever a message from your boss arrives. A set of well-thought-out rules can definitely make your life easier.

Ways to Create a Rule

Outlook gives you two ways to create a rule. For simple rules that require the most common actions, the Create Rule dialog box is the way to go. For anything beyond the simplest rules, you'll want to enlist the help of the Rules Wizard.

Use the Create Rule Dialog Box

The simplest way to create a rule is to right-click the name of a message in the Inbox pane and select Create Rule on the shortcut menu. This opens the Create Rule dialog box. The Create Rule dialog box (shown in Figure 4-6) is the best place to create simple message-handling rules.

> **TIP** *The first time you do this, Outlook pops up an information box that tells you messages from HTTP accounts can't be manipulated with rules. When the box appears, read it, then set the Please Do Not Show Me This Dialog Again check box to keep it from reappearing.*
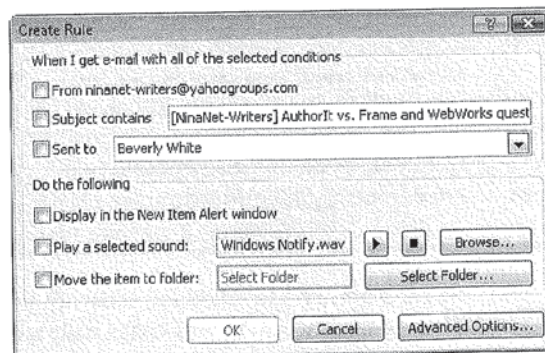

FIGURE 4-6   This dialog box makes it easy to create basic rules.

To start with, Outlook uses information from the message you selected to fill in the dialog box. The From, Subject, and Sent To check boxes all contain information taken from the message you selected when you opened the Create Rule dialog box.

Those first three check boxes are conditions that you can use to trigger the new rule you are creating. In Figure 4-6, I could, simply by selecting the appropriate check boxes, create a rule that is triggered whenever a message arrives from Bill Mann that is addressed to me only. If you select more than one condition in the Create Rule dialog box, all of them must be satisfied before the rule is triggered. (Yes, I often send e-mail to myself!)

The Do the Following section of the dialog box is where you specify what happens when the rule is triggered. By choosing the appropriate check boxes, you can have Outlook:

- Display the item (a message in this case) in the New Item Alert window

- Play a sound

- Move the item to a folder

As with the Conditions section of the dialog box, you can select more than one action and all of them will occur when the rule is triggered.

After you create the rule, click OK to exit the Create Rule dialog box. If you successfully created a new rule, a Success message box like the one in the following illustration appears. This message box lets you apply your new rule to all the messages in the Inbox right now. Select the check box if you want Outlook to apply the new rule to all the messages in the Inbox as well as future messages.
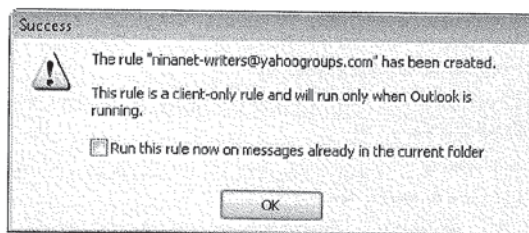
Use the Rules Wizard

The Create Rule dialog box is great for simple rules. But if you need to create more complex rules, rules triggered by conditions other than those in the Create Rule

dialog box, or rules that perform other than the most common actions, the Rules Wizard is the way to go. It gives you access to the full power of Outlook's rules.

To activate the Rules Wizard, click Tools | Rules and Alerts in the Outlook main menu. This opens the Rules and Alerts dialog box. Select the E-Mail Rules tab if it isn't already visible. Using this tab, you have complete control over the rules that Outlook uses. Return here if you want to change, copy, delete, or disable a rule.

4
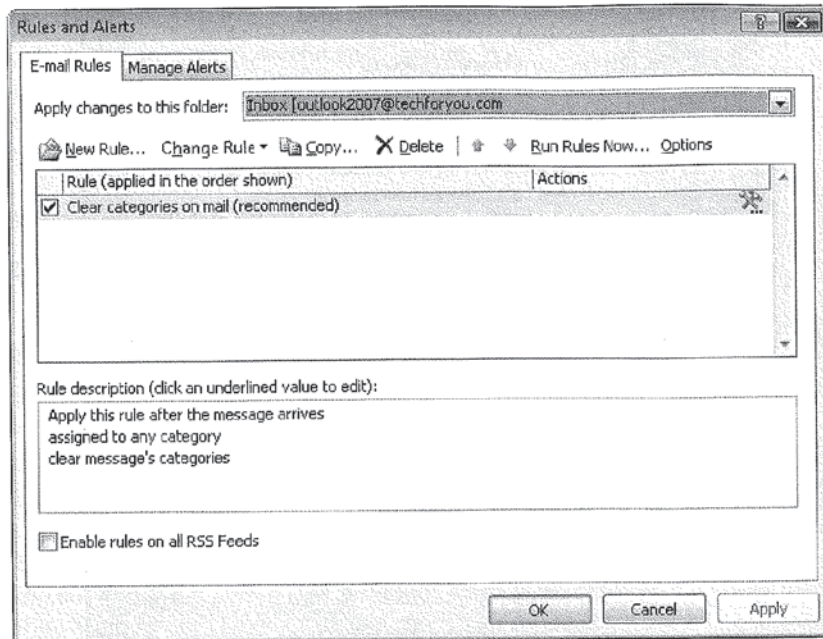
To activate the Rules Wizard, click New Rule. This launches the Rules Wizard shown in Figure 4-7.

The Rules Wizard helps you get started by providing a collection of rule templates. These templates are organized into two broad categories: Stay Organized and Stay Up to Date. When you have more experience with rules, you can dispense with the templates altogether, but when you're starting out, the templates are definitely the way to go.

> **TIP**   *If you want the most flexibility in creating Outlook rules, start the Rules Wizard, and then select one of the options under Start from a Blank Rule. This gives you access to all of Outlook's options and conditions for creating rules.*
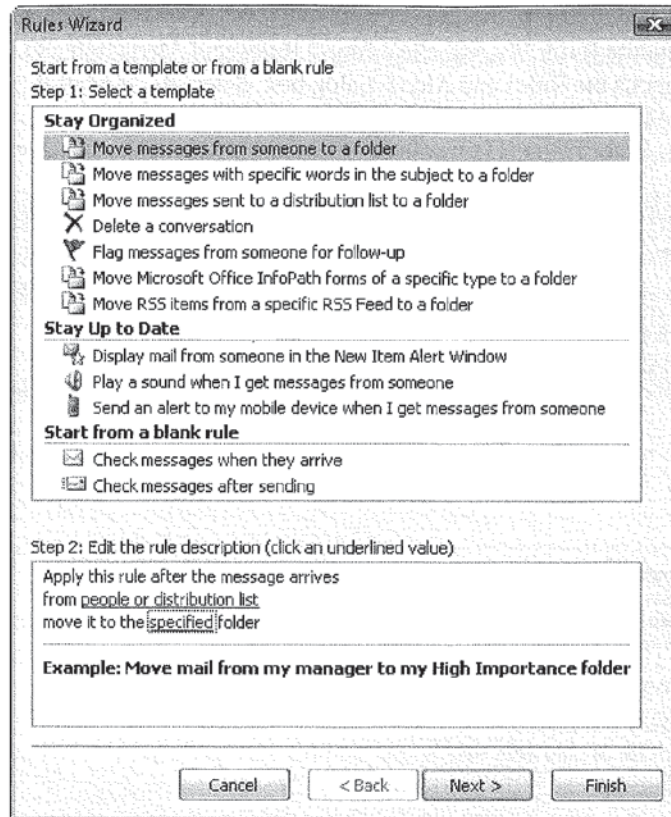
FIGURE 4-7   This is the first screen of the Rules Wizard.

Using a template is a multistep process. In Step 1, you select a template from the list of available templates. The rule description for the template you selected appears in the wizard's Step 2 box.

If you look at the Step 2 box shown in Figure 4-7, you can see underlined values in the rule description. You customize the rule by selecting specific values for these placeholders. When you click an underlying value, the Rules Wizard displays a dialog box that helps you fill in that value. Once you replace the placeholders with specific values in the rule, click Next to continue.

Work your way through the wizard's screens to complete and customize the rule, as well as indicate any necessary exceptions to the rule. In its last screen, the wizard lets you name the rule, turn it on, and review it before putting it into effect. Finally, you have the option to apply the rule to all the messages currently in the Inbox. When you're done selecting these options, click Finish, and you're done.

Some Rules Tips

Outlook's rules are very powerful and flexible. While you can use them in the most straightforward manner—create a specific rule for each message, for example, and let the rules run all the time—you can get more out of Outlook rules if you know some simple tips. Here are two good ones:

- Combine rules if you can
- Carefully consider the order of your rules

Combine Rules If You Can

Whenever possible, combine rules. It's easy to end up with redundant or nearly identical rules, particularly when you use the Create Rule dialog box to create rules. The more rules Outlook has to process, the longer it takes to process them. A large collection of rules can have a noticeable impact on Outlook's performance. Also, rules that are similar to one another can make it hard to update your rules list, because you have to update all the related rules instead of a single rule.

The answer to the problem of too many rules is to combine rules whenever possible. Suppose you have a rule that moves all messages from my friend AA (Adam Arnold) Adamson to the Stuff to Keep folder, and you decide to do the same with messages from his sister Alex. You could easily use the Create Rule dialog box to create a separate rule that moves messages from Alex to the Stuff to Keep folder. However, what happens if you decide to start putting messages from AA and Alex and the rest of their siblings into an Adamson clan folder? You have to remember to change two rules.

A better approach would be to add Alex to the existing rule that already handles messages from AA. As shown in Figure 4-8, you can modify any existing rule by opening the Rules and Alerts dialog box and directly editing the rule description in the Rule Description window. You can also double-click the name of a rule to open the Rules Wizard and directly edit the rule there. And you can make certain changes by clicking Change Rule and choosing a change from the menu that appears.
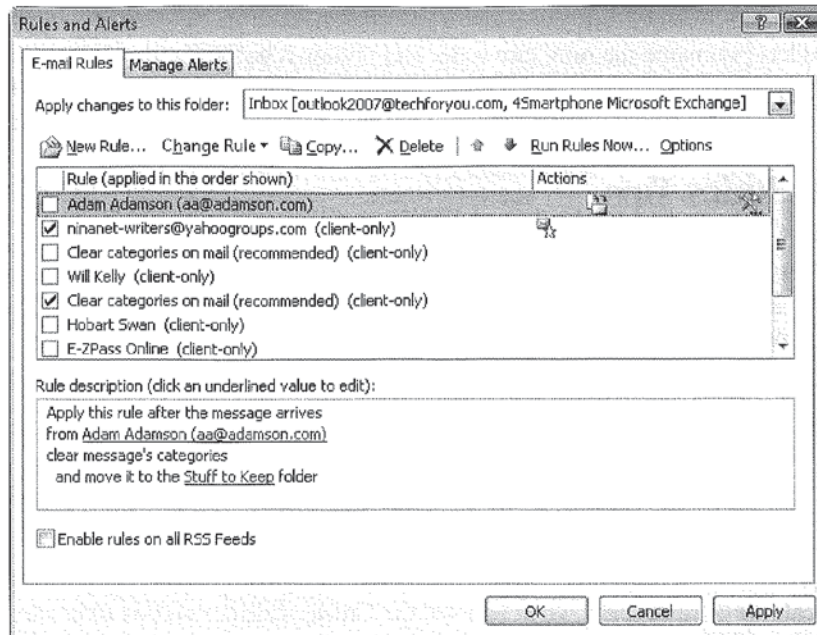
FIGURE 4-8 If you select a rule, you can modify it in the Rule description box.

Carefully Consider the Order of Your Rules

Outlook executes rules in the order in which they appear in the Rules and Alerts dialog box. You can take advantage of this fact along with the Stop Processing More Rules action to speed the processing of rules and deal with special situations.

Moving messages that meet certain conditions into folders is a common use for rules. If you create a rule that moves messages from Joe into the Buddies folder, and that's the only (or last) thing you want to happen when a message from Joe arrives, you can add the Stop Processing More Rules action to the rule that moves Joe's messages. This way, Outlook doesn't need to check any of the following rules for messages from Joe, and it can start processing the next message sooner.

Work with Some Additional E-Mail Features

This section of the chapter provides a home for three e-mail–related features that don't fit anywhere else: Flagging, AutoComplete, and Info Tags. All three are examples of the kind of small changes that Microsoft has made to Outlook 2003 to increase your productivity. Here are the main advantages of each feature:

- Flagging turns a message that you want to follow-up into a task with a reminder in only a few clicks.

- AutoComplete saves you from having to type long e-mail addresses.

- Info Tags give you access to key information about a message without having to open it.

Keep Track of Messages You Must Act on with Flagging

According to Microsoft, research shows that people do one of three things with their messages: They respond to them immediately, discard them immediately, or plan to deal with them later when they have the time to reply or access to the information they need.

Where people get in trouble is option three, the "plan to deal with them later" bit. One way to deal with the problem is to open each message that needs attention in its own window and address the messages when you have the opportunity. But there are some real problems with this short-term approach. Leaving windows open on the desktop is only practical if you're never going to turn off your computer. Plus, having 5, 10, 15 or more message windows open on the desktop is awkward.

People come up with many ways to tackle this issue, including establishing a separate "To Do" folder or leaving messages unread so that they're more visible in the Inbox, but none of these techniques works especially well.

To help you track messages, Outlook 2003 introduced Quick Flags. Quick Flags are flags that appear on the right side of each message in the Inbox pane. By choosing a Quick Flag for a particular message, you could, with a minimum amount of effort, signify that a message needed attention in the future.

Outlook 2007 takes the concept further. Instead of a set of colored flags that merely grab your attention, flagging marks a message as something that needs to be taken care of, and creates a task, with a due date, for dealing with that message. I like this feature a lot.
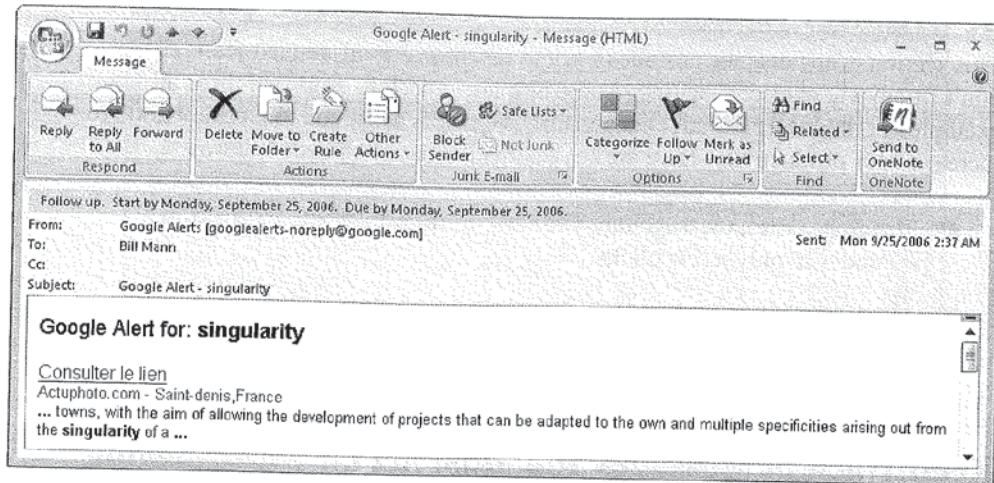
FIGURE 4-9 A message flagged for follow up.

If you look at a message in the Inbox or Unread Mail pane, or any other list or mail messages, you will see that they have a dim flag to the right of them. If you click the flag, it turns red to signify that you need to follow up on the message. Click it again, and it turns into a check mark so you know you've completed whatever action was needed.

Now view a flagged message in the Reading pane or an open window, and you will see when the message was flagged, and when you are due to have acted on it in the message's Info Bar. Figure 4-9 shows what this looks like.

CAUTION *Messages you imported from Outlook 2003 that already were flagged do not show the dates. They just say, "Follow up."*

So far, this isn't much different from what we had in Outlook 2003. Now right-click one of those ghostly flags. A shortcut menu appears with a bunch of interesting options. With one or a few clicks, you can set the follow-up date to any of five predefined options or a custom one. You can add a reminder to the task, mark it complete, or simply clear the flag (assuming it is already set). The Set Quick Click option lets you change which flag is added when you left-click on the flag icon.
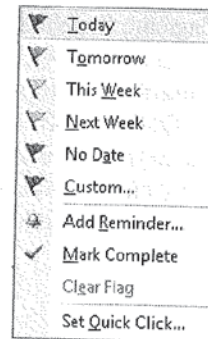
# Work Faster with Outlook's Improved AutoComplete

AutoComplete helps you work faster by suggesting entries you have used before when you are filling in certain fields. For example, if you have typed the address "john.smith@techforyou.com" into the To field of a message before, and you have just typed the letter *j* in the To field of a new message, Outlook may suggest that you are typing john.smith@techforyou.com. The idea is that you can select the suggestion, rather than typing the entire address.

As you type, Outlook displays a list of suggestions. If the list of suggestions that AutoComplete offers contains only one entry, or the entry you are typing is highlighted in the list, you can immediately press ENTER to insert that entry in the field without typing the rest of it.

AutoComplete offers suggestions as soon as you type the first letter of an entry. As you continue to type, the list of suggestions shrinks as the number of possibilities narrows. In many cases, you need to type only one or two characters and press ENTER.

AutoComplete displays the most frequently used entries first, thereby adapting its suggestions to match your changing needs and reducing the number of characters you have to type.

Figure 4-10 shows AutoComplete in action. For the figure, I typed the letter *o* into the To field, and AutoComplete opened a screen tip containing a list of e-mail
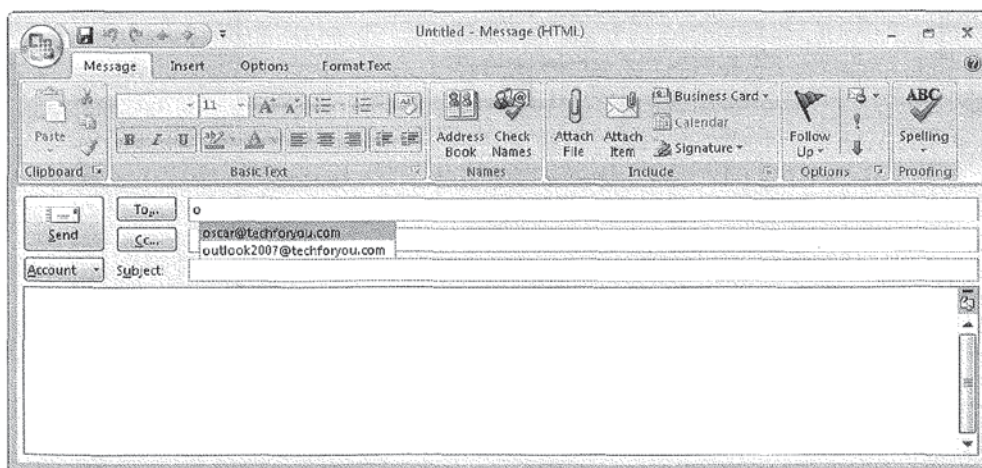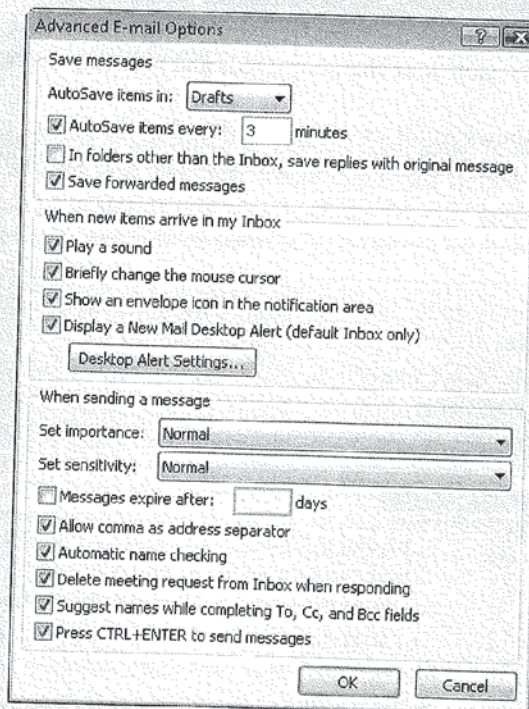

FIGURE 4-10 AutoComplete suggests names and addresses to save you typing.

How to ... Turn Off AutoComplete

Not everyone likes AutoComplete or finds it helpful. If you are one of those people, you can turn off the feature altogether by following these steps:

1. In the main Outlook menu, click Tools | Options to open the Options dialog box.

2. On the Preferences tab, click E-Mail Options to open the E-Mail Options dialog box.

3. Click Advanced E-Mail Options to open the Advanced E-Mail Options dialog box shown here.

Advanced E-mail Options

Save messages

AutoSave items in: Drafts

☑ AutoSave items every: 3 minutes

☐ In folders other than the Inbox, save replies with original message

☑ Save forwarded messages

When new items arrive in my Inbox

☑ Play a sound

☑ Briefly change the mouse cursor

☑ Show an envelope icon in the notification area

☑ Display a New Mail Desktop Alert (default Inbox only)

Desktop Alert Settings...

When sending a message

Set importance: Normal

Set sensitivity: Normal

☐ Messages expire after: days

☑ Allow comma as address separator

☑ Automatic name checking

☑ Delete meeting request from Inbox when responding

☑ Suggest names while completing To, Cc, and Bcc fields

☑ Press CTRL+ENTER to send messages

OK   Cancel

4. Clear the Suggest Names While Completing To, Cc, and Bcc Fields check box in the When Sending a Message section of the dialog box.

addresses I've used before that start with the letter o. The addresses in the list are arranged by frequency of use, with the one I use most frequently highlighted at the top of the list.

If the highlighted address is the one you want to enter, all you need to do is press ENTER and AutoComplete enters it in the To field. If the highlighted address isn't the address you want to enter, you can manually select a different address from the list or keep typing. Eventually, the address you want to use will either be highlighted in the AutoComplete list or you will have typed the entire address manually. Every time you type an address manually, AutoComplete adds it to its own list of addresses to offer next time around.

What if AutoComplete offers a bunch of addresses that you don't want anymore? You can delete addresses from the AutoComplete menu easily. When you see an AutoComplete menu with an address that you don't want, press the UP or DOWN ARROW key to select the address and press DELETE. Doing so removes the address from the set that AutoComplete offers.

TIP
The Calendar has its own form of AutoComplete that you'll learn about in Chapter 7.

Scan Your Inbox with Message Info Tags

While the Inbox pane makes a good bit of information about each message visible, the information you can see isn't always enough. For that reason, Info Tags provide additional information when you hover the mouse pointer over a message.

The information that appears in an Info Tag depends on what information is visible in the Inbox pane. For example, if the sender and subject of a particular message are completely visible but the date and message size are not, the Info Tag shows only the date and size of the message. I suggest you play with Info Tags a bit to see the kinds of information available for different messages.

How to Do *Everything*

Microsoft® Office Outlook® 2007

Centralize communications and schedule management with Outlook 2007 using this easy-to-follow guide. Get a quick tour of new and updated Outlook features, including the redesigned interface, then dig into managing your e-mail; recording and tracking appointments and upcoming events; integrating with other Office applications; and much more. With valuable tips on customizatio security, and mobilizing your Outlook data, this is a must-have resource for every Outlook 2007 user.

* Navigate the new interface and learn keyboard shortcuts

* Manage multiple e-mail accounts, create folders, and automate mail handling

* Learn advanced e-mail management strategies, such as intelligent grouping, filtering, and Color Categories

* Create Tasks and To-Do items and use the To-Do Bar

* Create search folders, plus manage and archive information

* Navigate the Notes and Journal functions

* Customize the user interface, including toolbars and menus

* Secure your account and block junk mail and spam

* Mobilize your Outlook data so you can stay connected while on the road

* Use Outlook with Microsoft Exchange and SharePoint Services

* Connect Hotmail and Gmail accounts to Outlook

About the author:

Bill Mann has written more than a dozen technology books and contributes to several magazines. He is a contributing editor for *Computing Unplugged*.