



MICHIGAN
ROSS SCHOOL OF BUSINESS



Microsoft Office
Outlook 2007

Outlook 2007 – More Than Just Email

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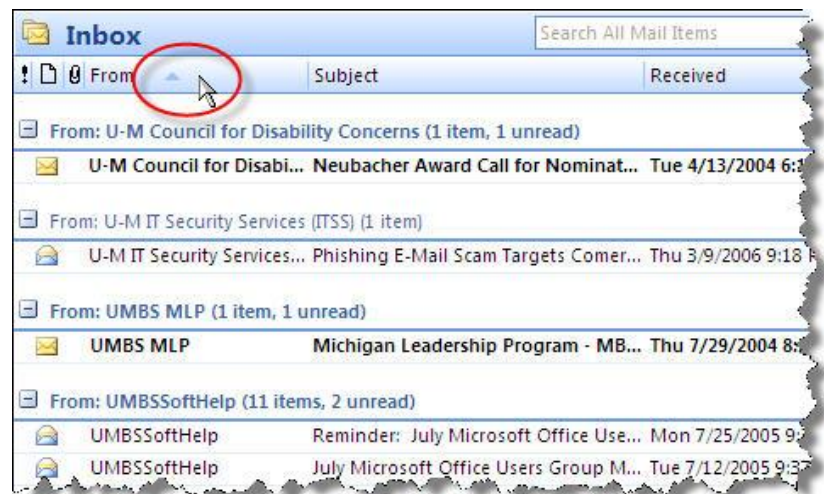
Mail

Managing the Inbox

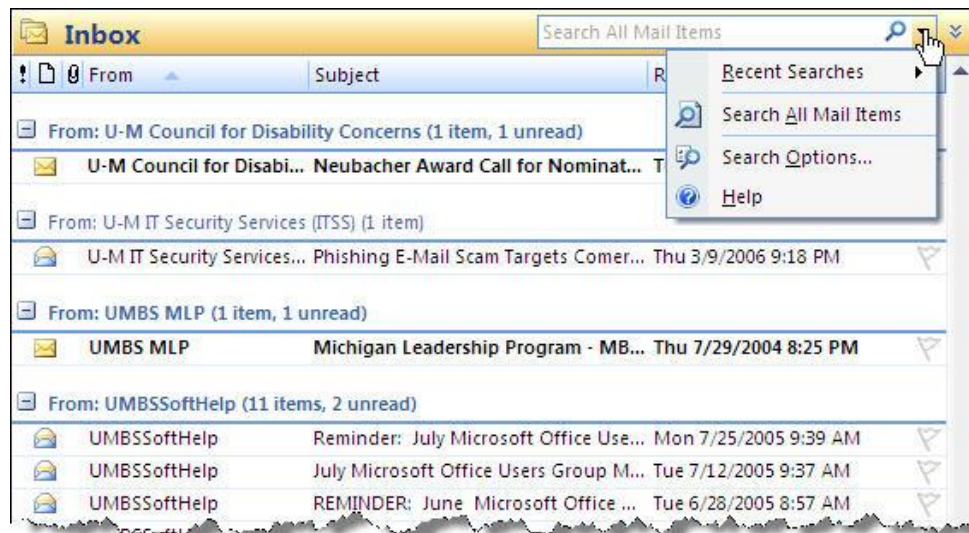
Keeping track of all the mail in the Inbox can be a daunting task. Outlook 2007 has a number of tools to help you stay organized.

Searching and Sorting Mail

By default, the Inbox is sorted by the received date, with the newest mail shown first. You can change how the messages are sorted by clicking the field name. The triangle in the field shows the direction the items are sorted, whether in descending order , or ascending order .

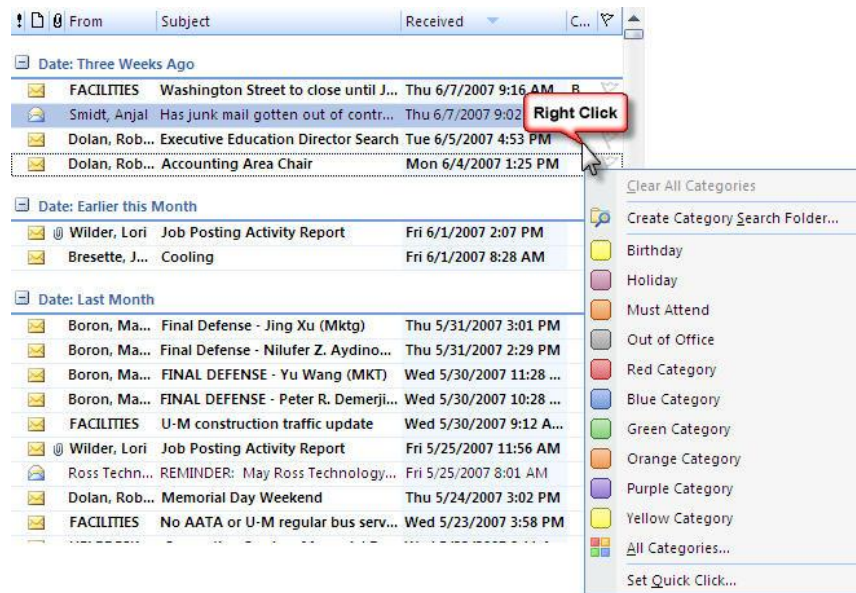


Search is automatically located in the heading of the mail window. Enter what you are searching for, or open the dropdown for advanced search options.

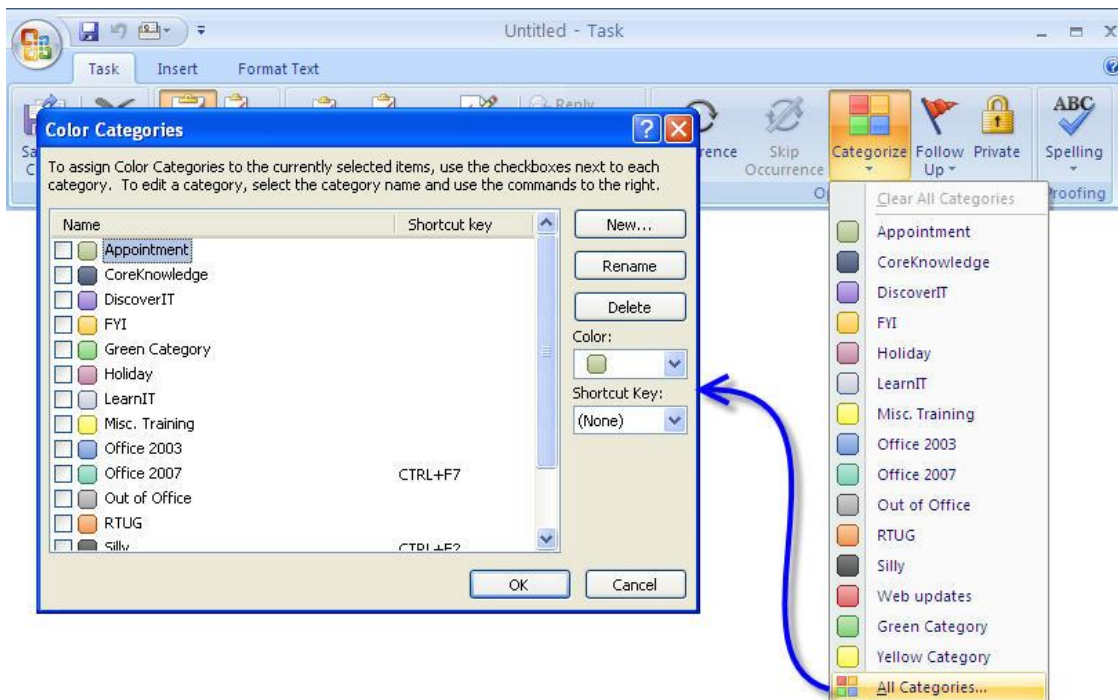


Categories

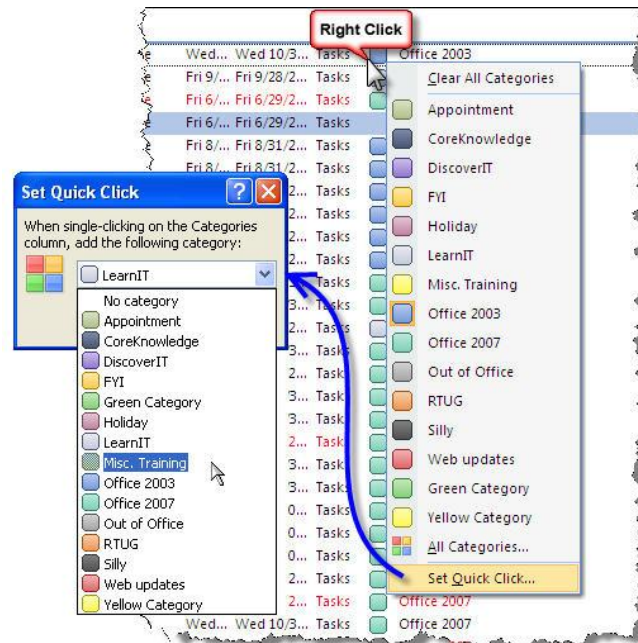
Assigning categories helps you easily identify and organize messages. To add a category to an email, right-click the space in the Category column.



Rename existing categories or create your own by selecting All Categories in the shortcut menu.

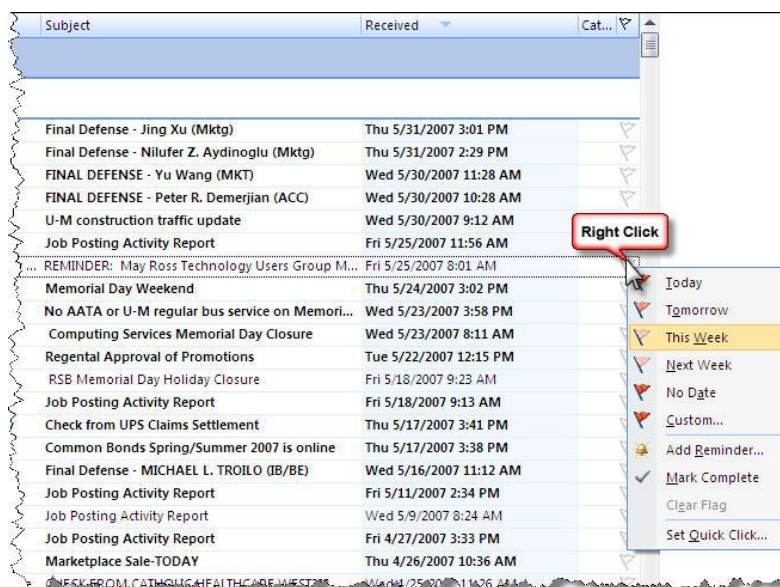


If there is a category you use more than any other for messages, you can set it as a Quick Click item.

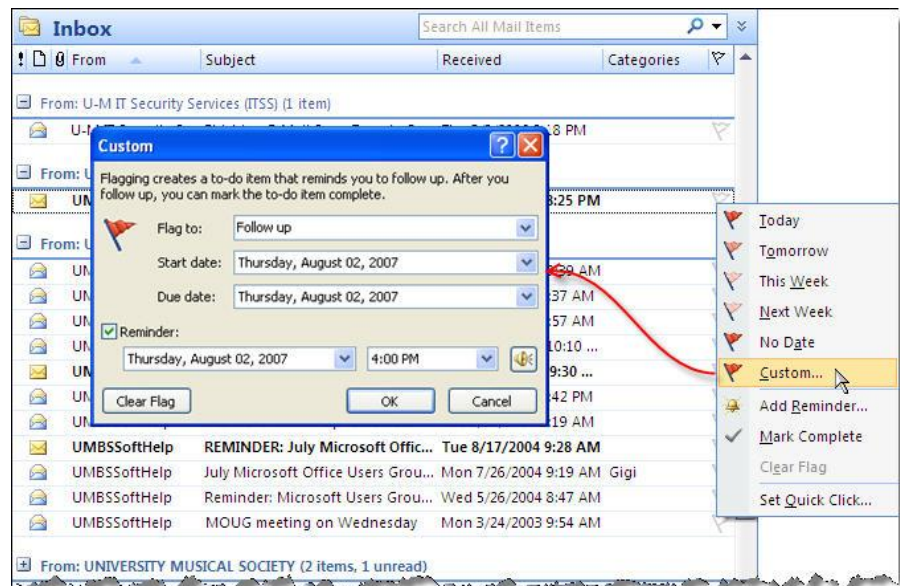


Flags

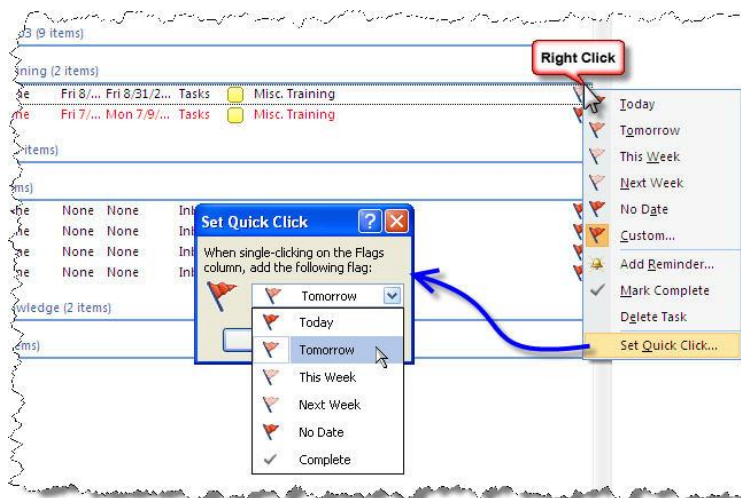
Flags identify mail items that need some type of action. The default flag is red, signifying that action needs to be taken that day. A right-click will allow you to choose a different follow-up date and you can set a reminder.



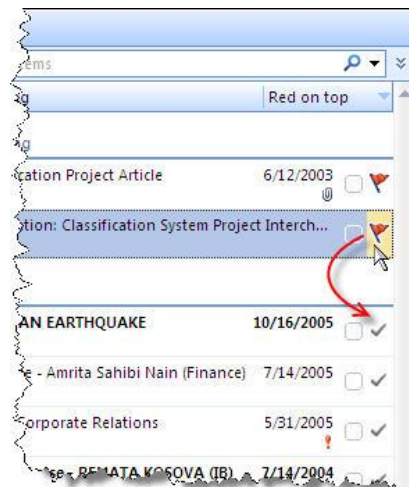
If the item needs to be addressed on a specific day, you can set a custom flag.



You can change the default Flag by assigning a Quick Click.



Once action on the flagged item is completed, click the flag to mark it complete and remove it from To-Do window.

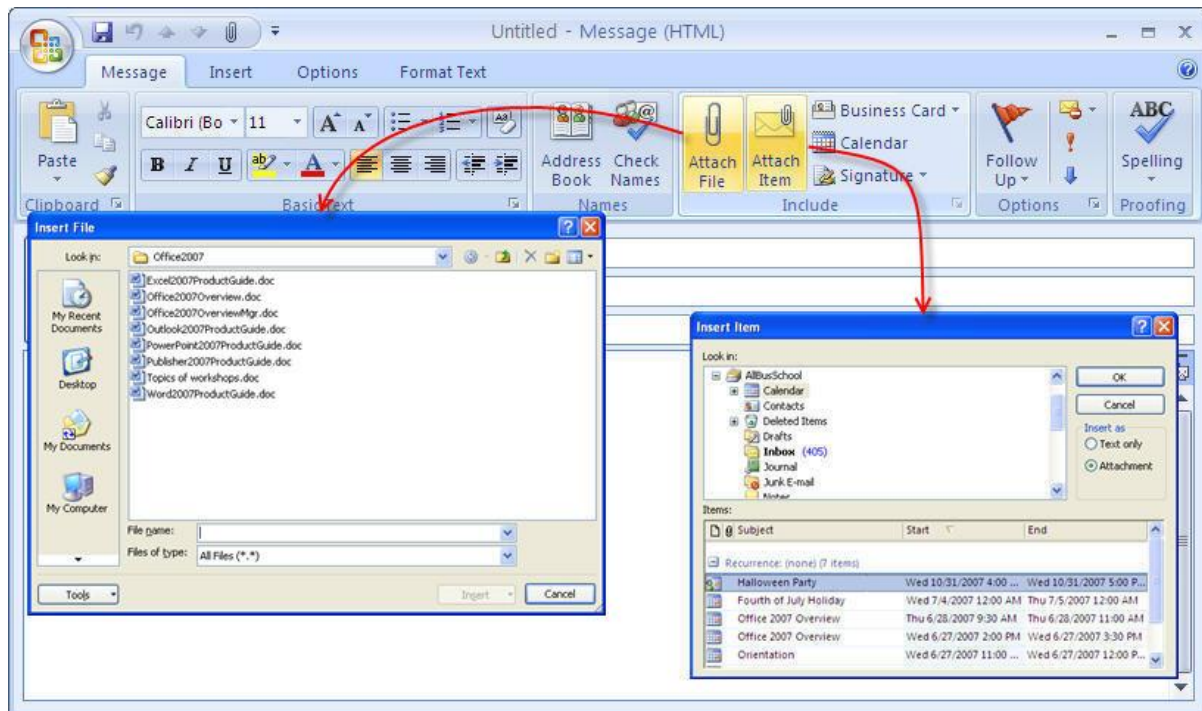


New Mail Items

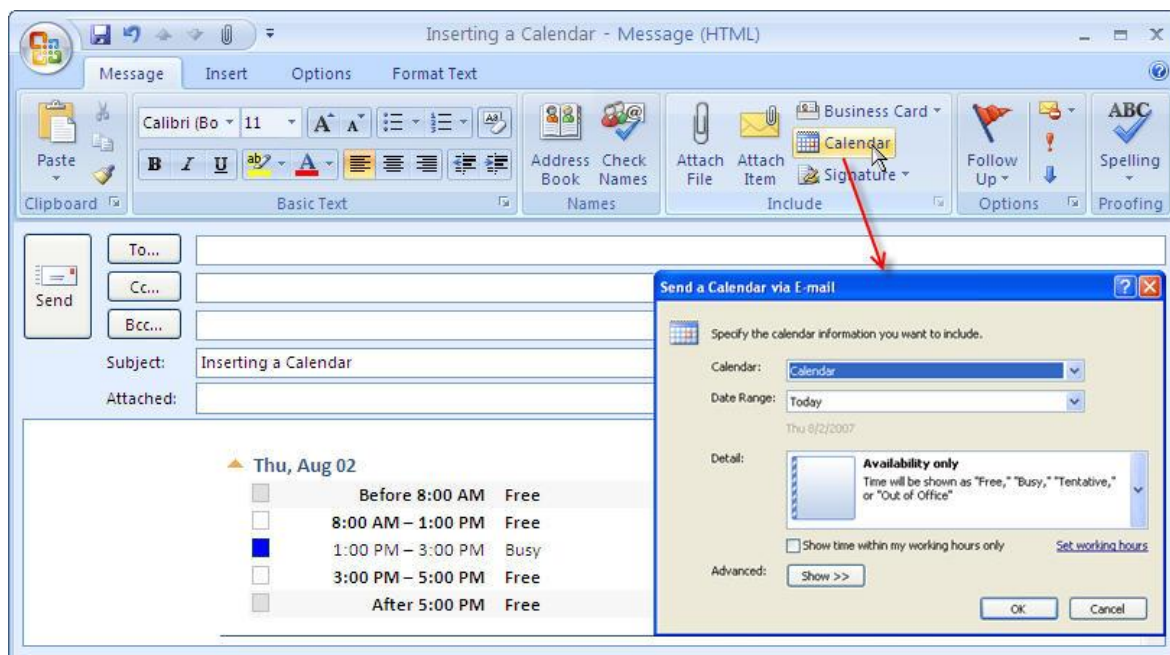
Often you need to send more than just a plain email. There are a number of settings and tools you can use to effectively send your message.

Attachments

You can include a number of attachments to an email. The most common attachment is a file. However, you can also attach Outlook items, such as contacts, notes and calendar items.

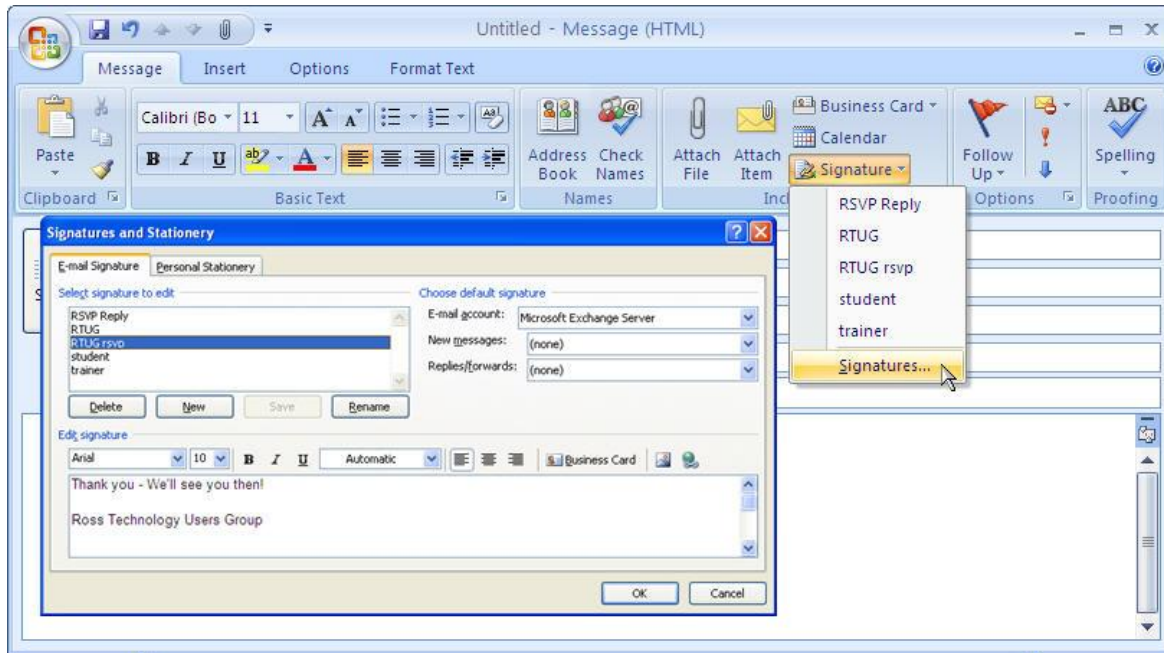


You can even insert your calendar in an email.



Signatures

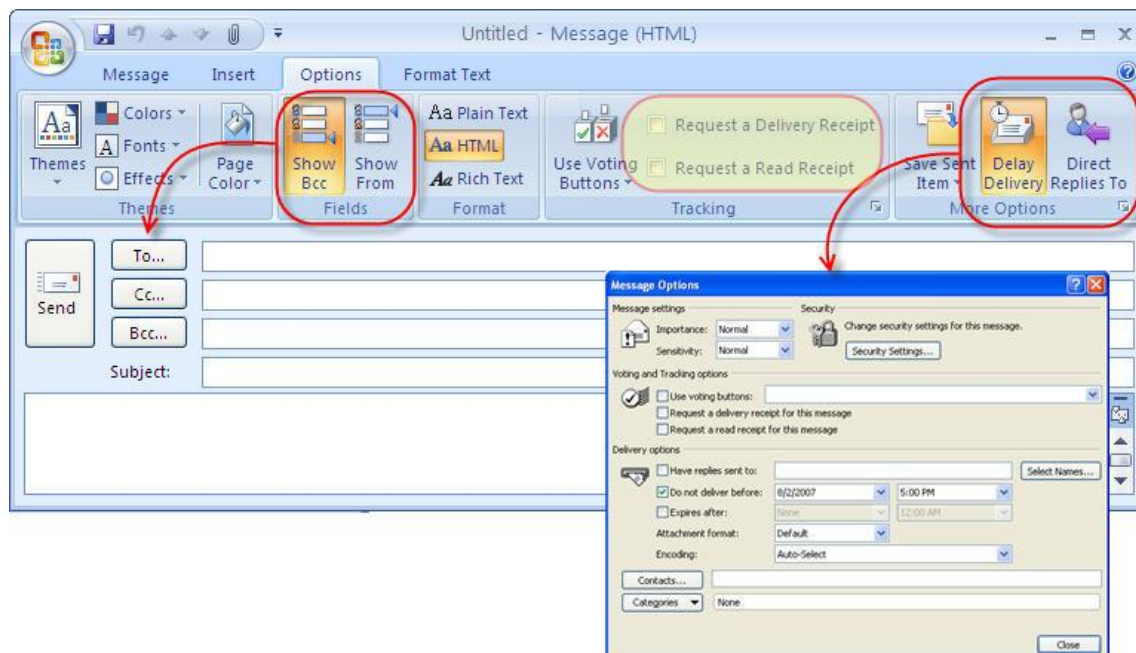
You can create a number of signatures to include in new messages and/or replies and forwards. Generic text can be saved as a signature for easy responses to emails. These signatures are stored on your computer, so they will not be available in webmail or at other workstations.



Mail Options

By default, the From and Bcc fields are not visible. You can turn them on from the Options Tab. These fields will stay open for all new messages, replies and forwards until they are closed.

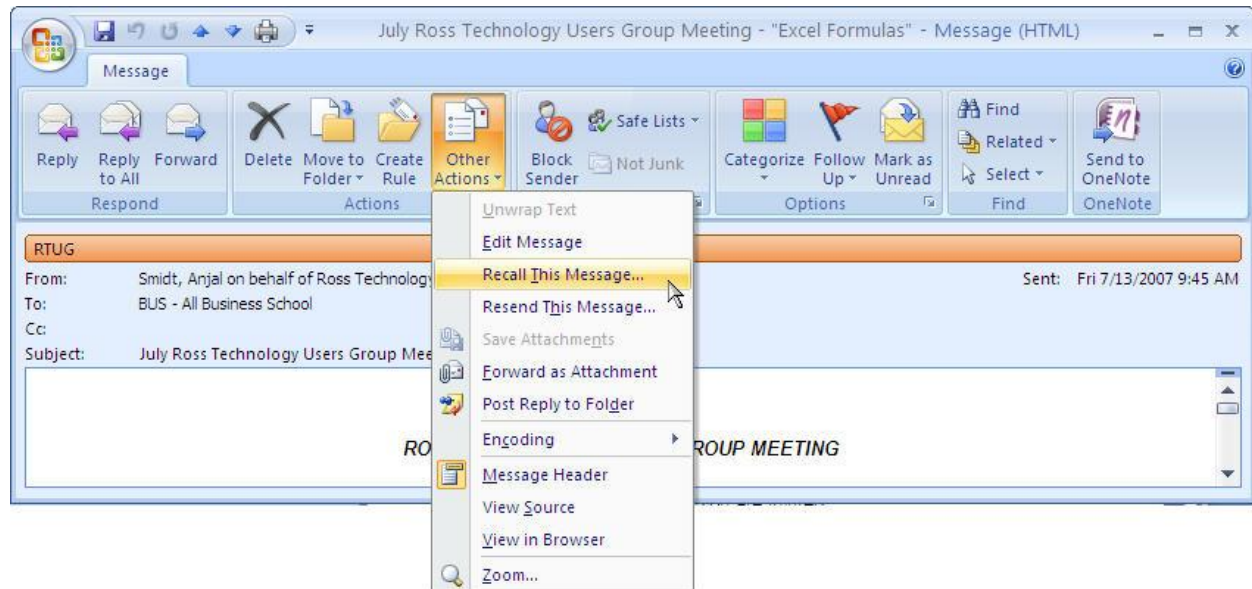
From the Options Tab, you can also set read and delivery receipts, delayed mail deliveries, and an address for all replies.



Recall/Resend Messages

You can resend a message and, within an Exchange server, recall sent messages. To resend or recall a message, open it from the Sent Items folder.

When you request to recall a message, you have the option to have the message deleted, or send a replacement message. If you requested a success notification, you will receive a failure message if the original message had already been opened or a success message once the recipient attempts to open the recalled message.

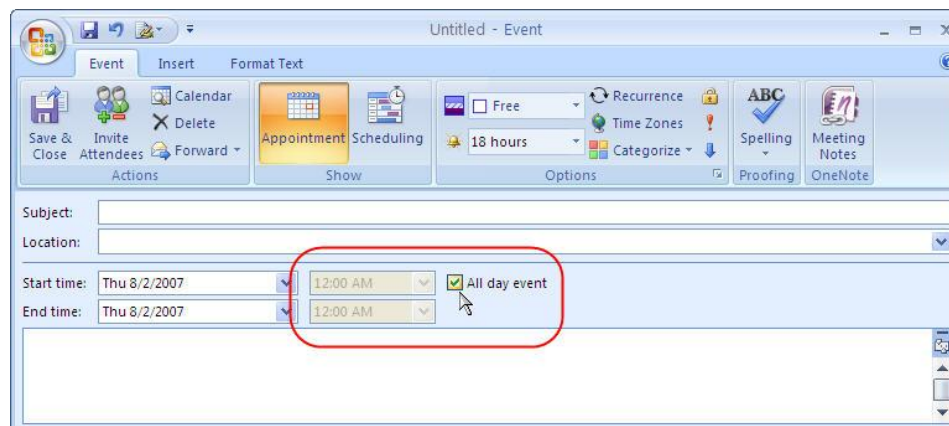


Calendar

The Calendar helps you keep track of your schedule and important date-sensitive events. There are three types of Calendar items that can be created.

Events

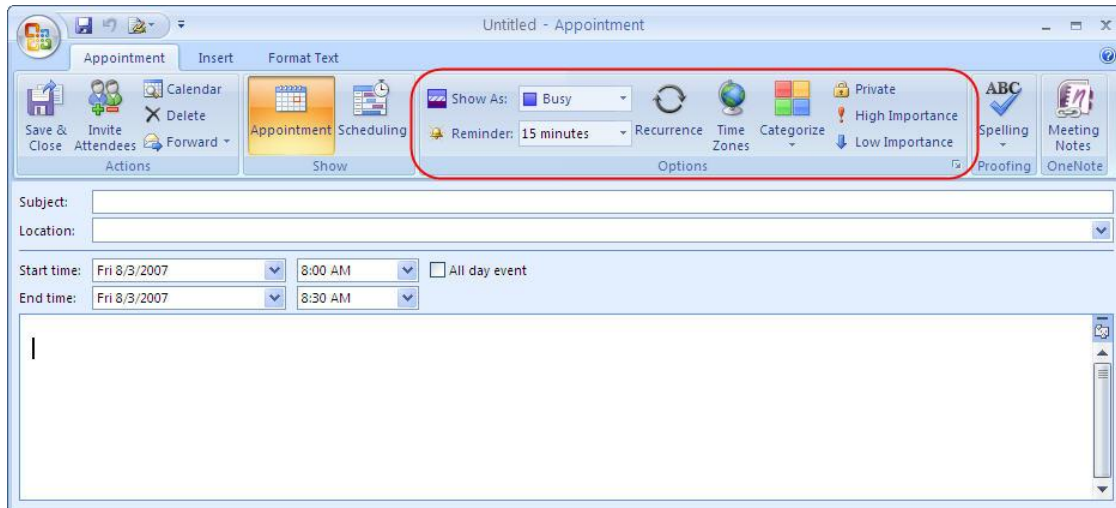
Events are calendar items cover an entire day or span of days. These could include all day events, vacations and holidays. To create an event, you choose All day event, which will make the time settings inactive.



Appointments

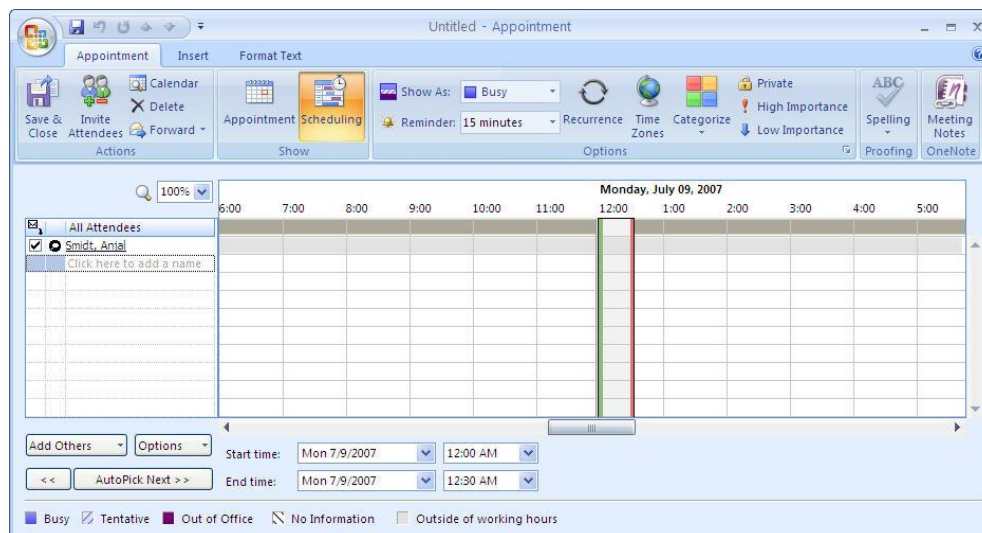
An appointment is a calendar item with a specific time that only applies to you. If you have given someone rights to your calendar, you can mark the item as private. Then they can see you are busy, but not the reason.

You can also mark your availability, set a reminder and categorize the item for sorting and easy identification.



Meetings

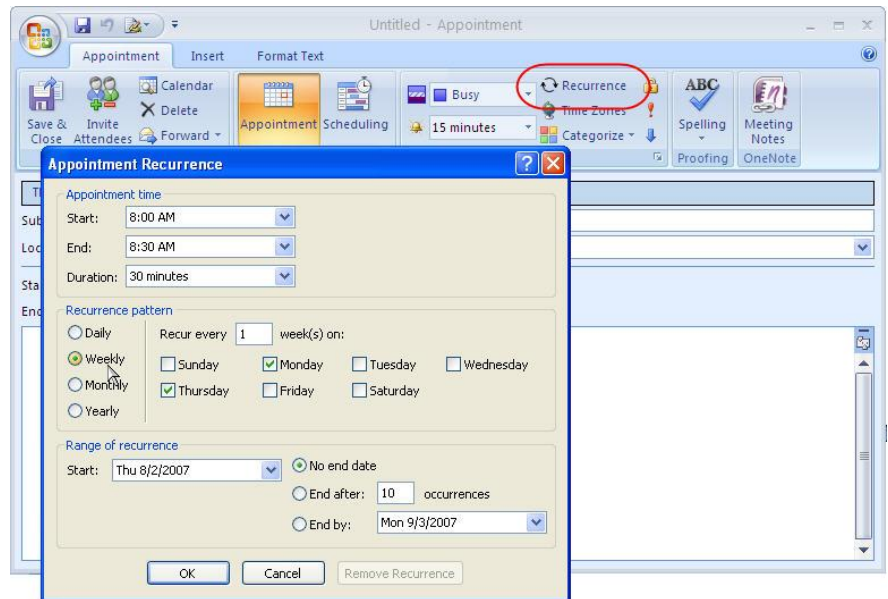
A meeting is simply an appointment that includes others. To create a meeting, either choose Invite Attendees, or enter their names in the Scheduling view.



The Scheduling view will allow you to check all attendees' available schedules. Rather than scrolling through the timeline to find an available meeting time, you can use AutoPick Next to have Outlook search for the next opening in everyone's schedule.

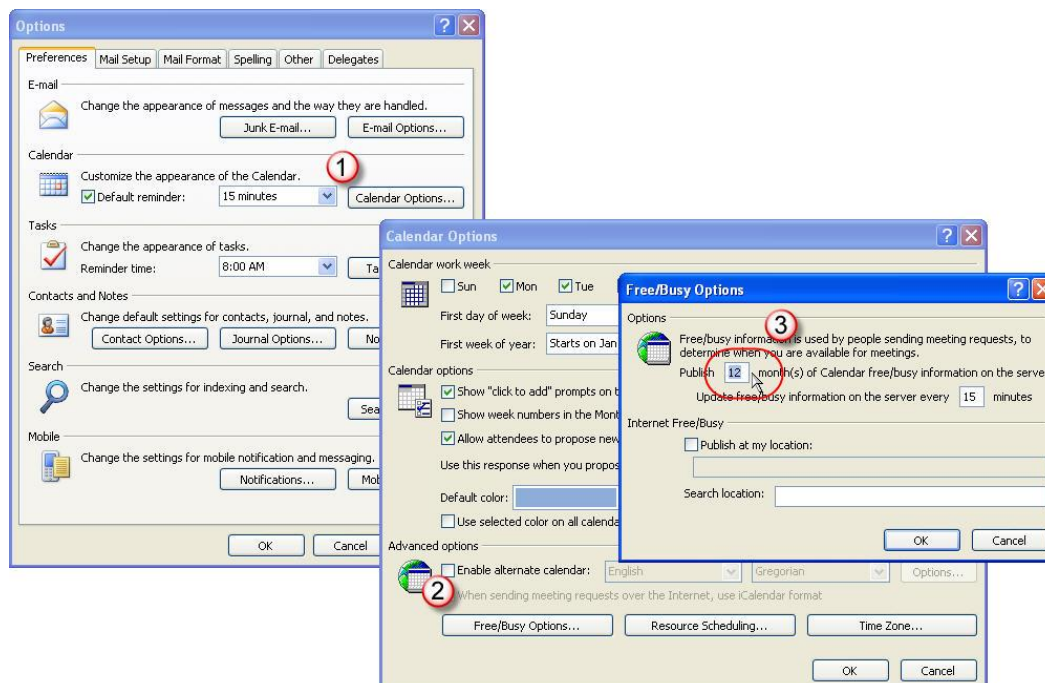
Creating Recurring Calendar Items

Some scheduled items occur on a regular basis, such as a birthday or a monthly meeting. Rather than entering new calendar items for each, set the recurrence.



Publishing Free/Busy Times on the Server

In order for others to see your availability for meetings, you need to make certain your schedule information is available on the Exchange server. The default setting is to show two months. However, this does not mean two months into the future, but the current month and the next. In other words, if it is July 20th, others will only see your availability for July and August. You can change this setting in the Outlook options under the Tools menu.



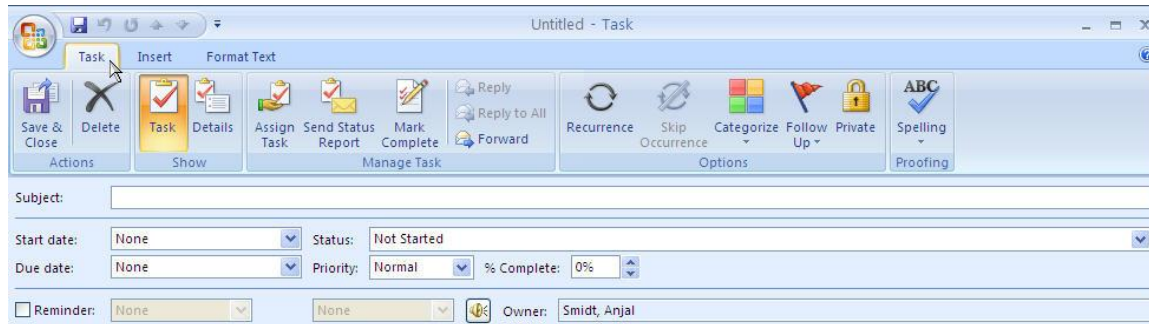
Tasks

Tasks can help you keep track of all the things that need to get done. Tasks will appear not only in the Tasks window, but also in the To-Do Bar and in the Calendar window.

Creating and Updating Task Items

The Task window is composed of two views. The main Task view includes the information that is needed for a task. Assigning start and due dates will include the task in the Calendar window below the appropriate dates.

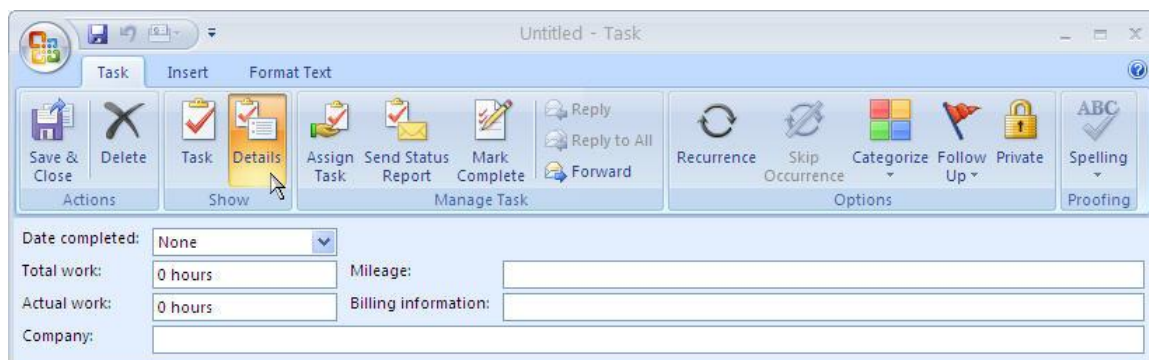
From this window, you can keep the task up-to-date by adjusting the percent complete and status. For example, you have a task that is 50% complete but you are now waiting on someone else to continue.



The screenshot shows the 'Untitled - Task' window with the 'Task' view selected. The ribbon includes 'Task', 'Insert', and 'Format Text'. The 'Task' ribbon has buttons for 'Save & Close', 'Delete', 'Task', 'Details', 'Assign Task', 'Send Status Report', 'Mark Complete', 'Reply', 'Reply to All', 'Forward', 'Recurrence', 'Skip Occurrence', 'Categorize', 'Follow Up', 'Private', 'Spelling', and 'Proofing'. The 'Details' ribbon is also visible. The task information fields are as follows:

Field	Value
Subject	
Start date	None
Status	Not Started
Due date	None
Priority	Normal
% Complete	0%
Reminder	None
Owner	Smidt, Anjal

The Details view allows you to add further information, such as mileage and amount of time committed to the task.

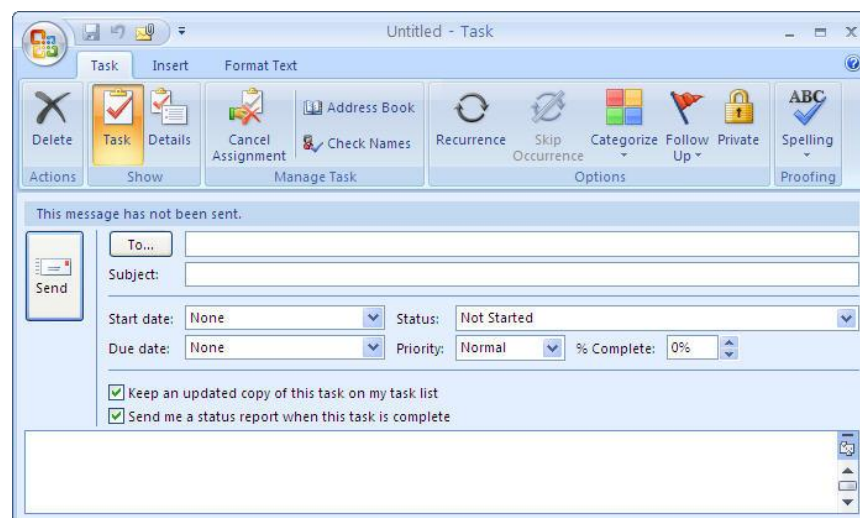


The screenshot shows the 'Untitled - Task' window with the 'Details' view selected. The ribbon includes 'Task', 'Insert', and 'Format Text'. The 'Details' ribbon has buttons for 'Save & Close', 'Delete', 'Task', 'Details', 'Assign Task', 'Send Status Report', 'Mark Complete', 'Reply', 'Reply to All', 'Forward', 'Recurrence', 'Skip Occurrence', 'Categorize', 'Follow Up', 'Private', 'Spelling', and 'Proofing'. The task information fields are as follows:

Field	Value
Date completed	None
Total work	0 hours
Mileage	
Actual work	0 hours
Billing information	
Company	

Assigning Tasks

Tasks can be assigned to others that are within the Exchange server. When assigning a task you can request to see the status of the task in your Task window and receive a notice of completion.

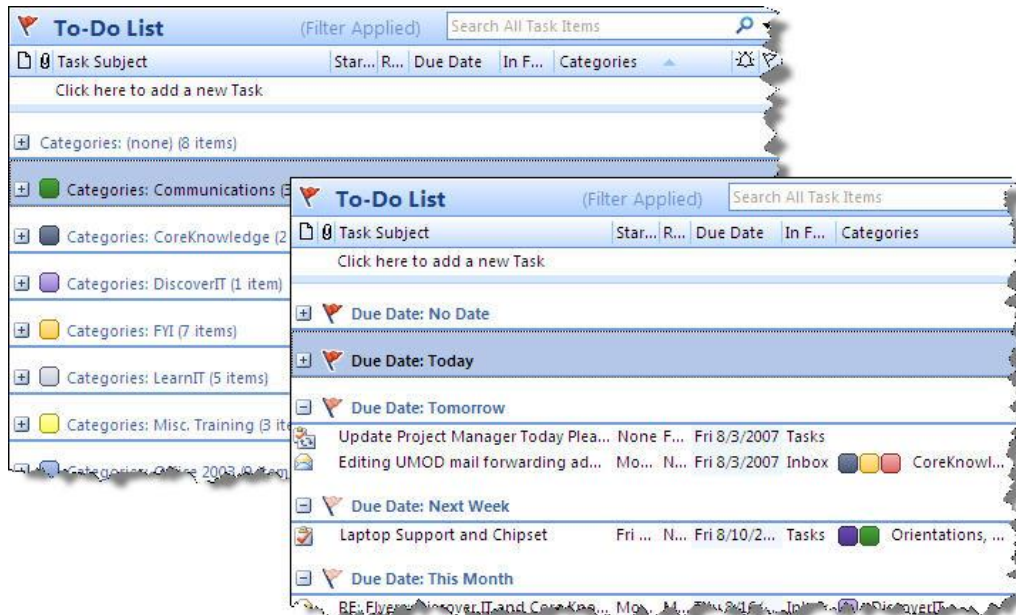


The screenshot shows the 'Untitled - Task' window with the 'Assign Task' view selected. The ribbon includes 'Task', 'Insert', and 'Format Text'. The 'Assign Task' ribbon has buttons for 'Delete', 'Task', 'Details', 'Cancel Assignment', 'Check Names', 'Recurrence', 'Skip Occurrence', 'Categorize', 'Follow Up', 'Private', 'Spelling', and 'Proofing'. The task information fields are as follows:

Field	Value
To...	
Subject	
Start date	None
Status	Not Started
Due date	None
Priority	Normal
% Complete	0%
Keep an updated copy of this task on my task list	<input checked="" type="checkbox"/>
Send me a status report when this task is complete	<input checked="" type="checkbox"/>

Organizing Tasks

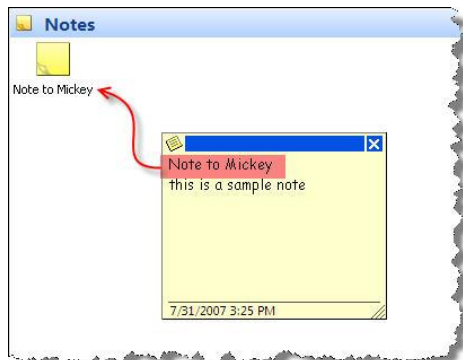
There are a number of ways to keep on top of tasks, other than the Calendar and To-Do Bar. Sorting tasks can keep them organized and easy to keep track of. A couple of ways to organize them is by due date or category.



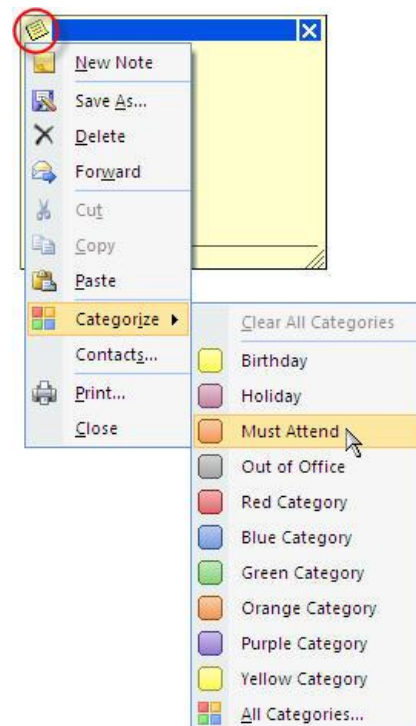
Notes

Outlook Notes are a computerized Post-it. Unlike a Post-it, Outlook Notes won't fall off your monitor and can be seen from other computers by logging into webmail.

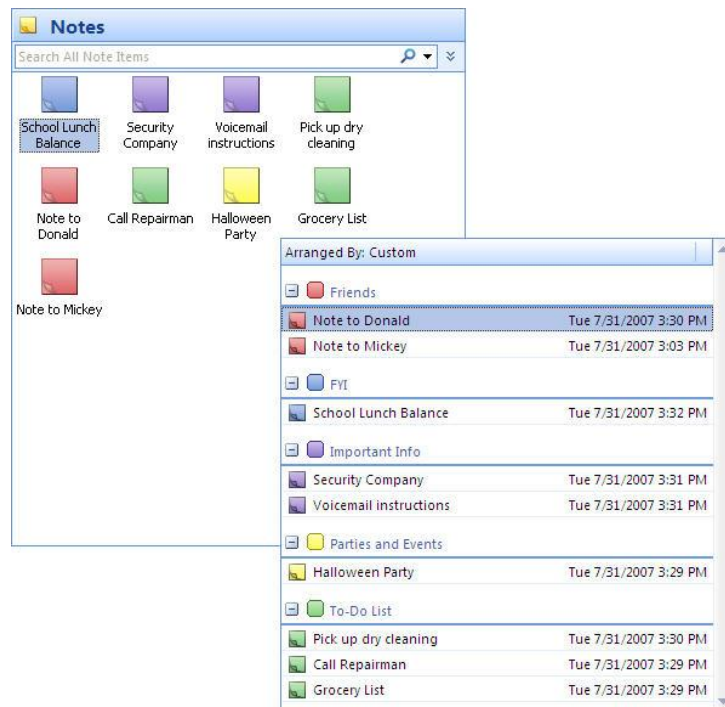
When creating a new note, the first line will be the title visible in the Notes window.



You can use categories to apply different colors to the notes.



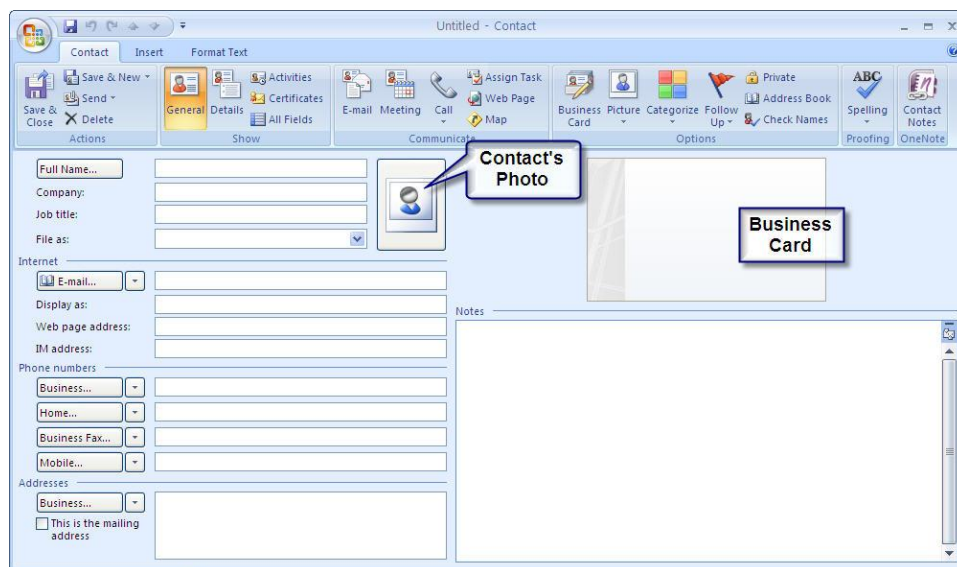
Notes can be viewed as a panel of “sticky notes”, or can be sorted according to assigned categories.



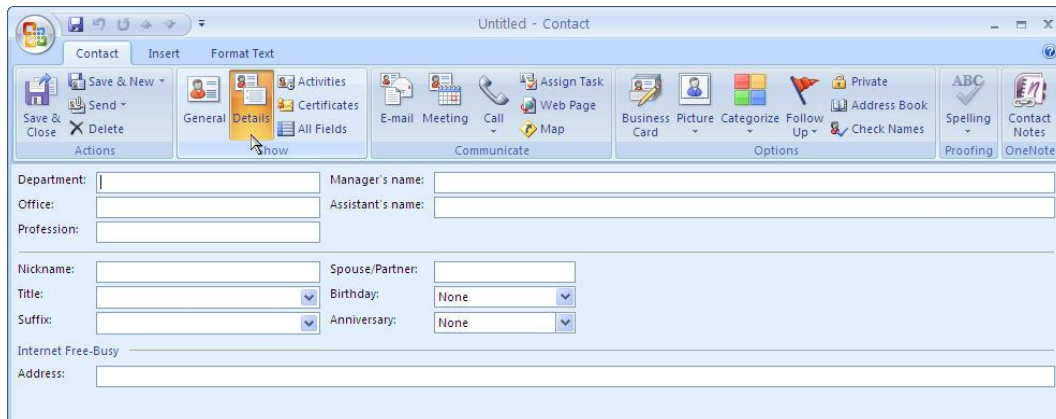
Contacts

Creating Contact Items

A contact item is used to store someone’s contact information, such as phone numbers, addresses, etc. Any field with a dropdown button offers the opportunity to enter more information about the contact. For example, there are a number of types of phone numbers that can be used – if you click the dropdown next to Business under Phone numbers, you can set that number as the Assistant’s number. You can even store up to three alternate email addresses for a contact.

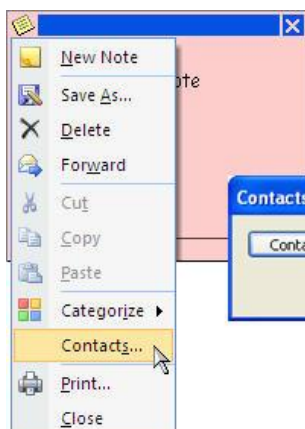
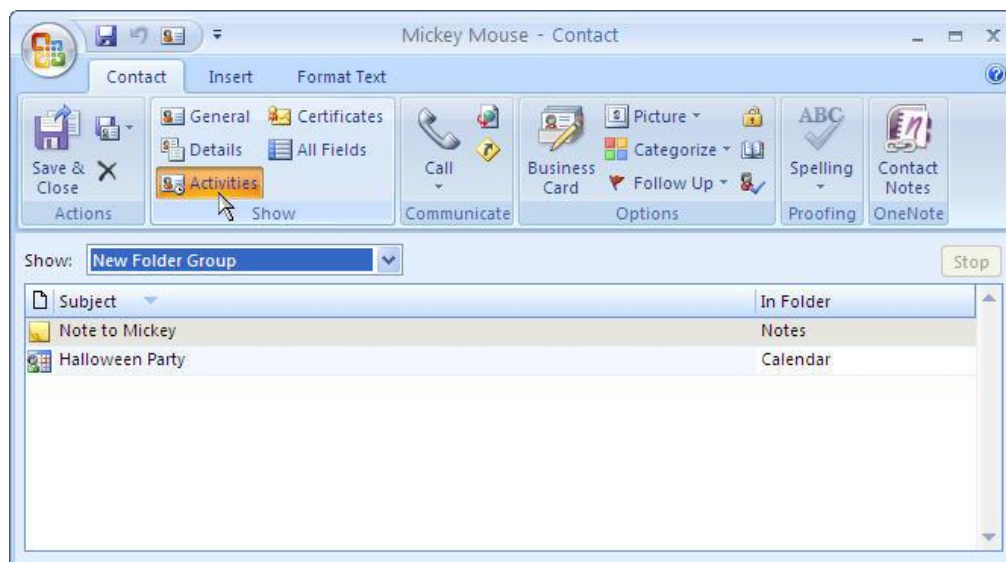


Additional details about the contact, such as their birthday or the name of their assistant, can be added and viewed in the Details view.

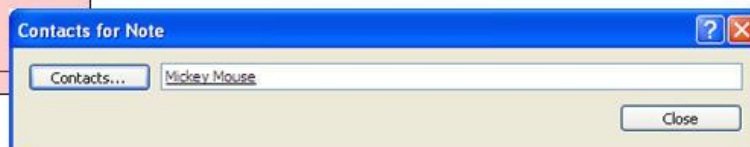


Tracking Contact Activity

Whenever a Contact is connected to an item, such as an email message or meeting, the items can be viewed in the Activities window.

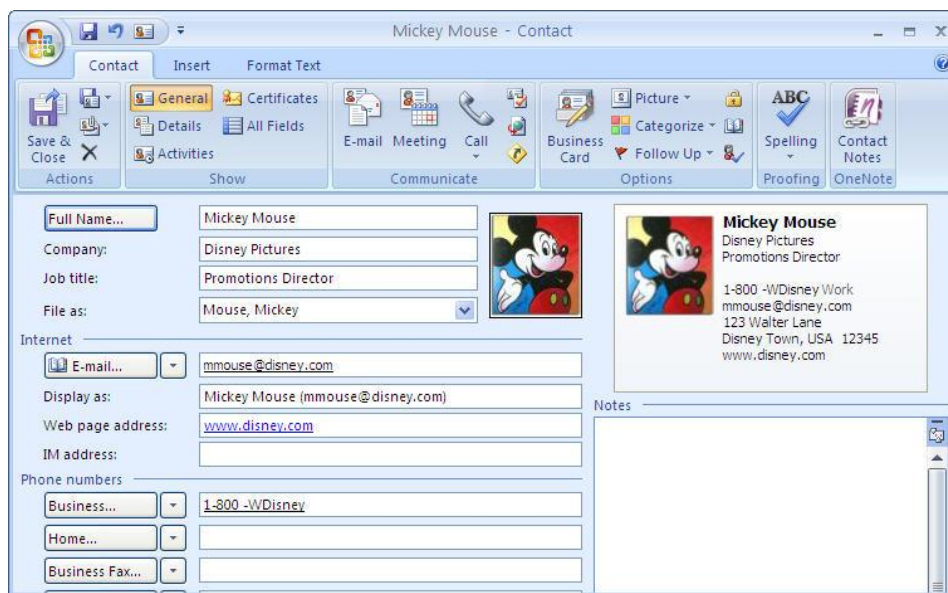


Any type of Outlook item can be viewed in the Activities window by simply connecting the item to a contact.

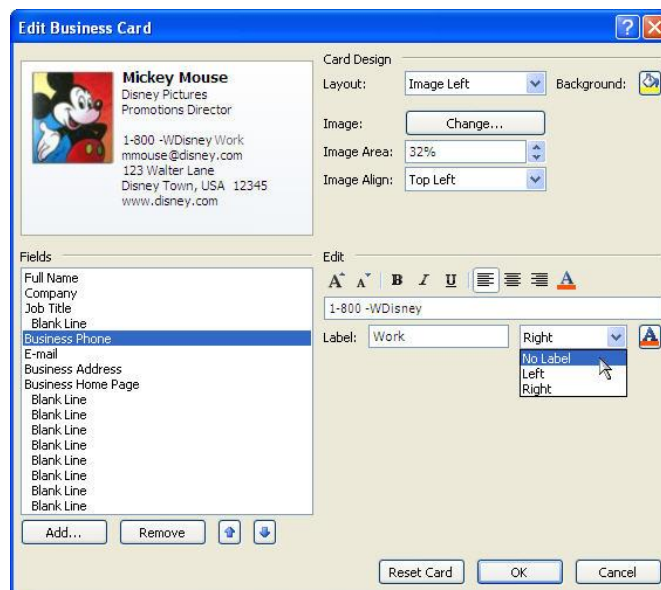


Business Cards

Business Cards are generated automatically for each Contact you create, and will include the photo, if available, and certain information from within the General contact window.



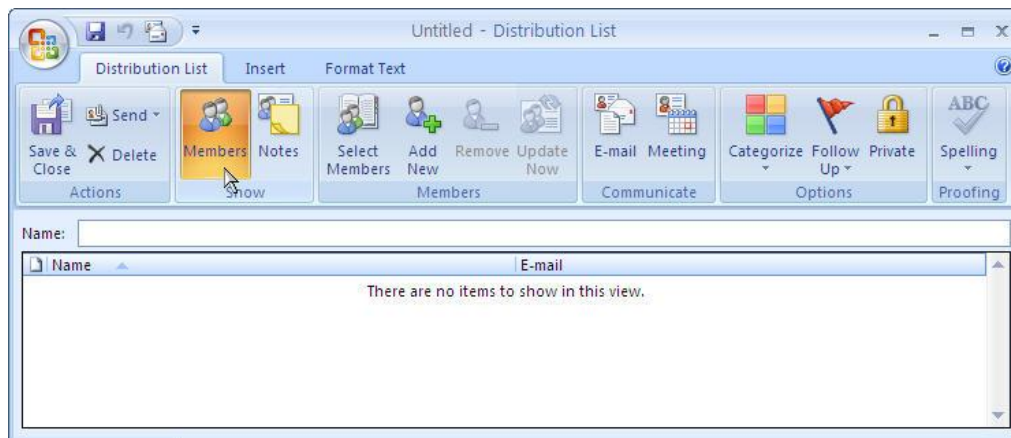
You can edit the appearance and contents of the virtual card by double- or right-clicking the card image.



Distribution Lists

While Distribution Lists are stored in your Contact folder, they are treated differently than your other Contact items. Distribution Lists are composed of many Contacts, so details for each cannot be shown. However, the data that can be stored in a Distribution List has been greatly enhanced.

The default setting is to view the members of your list. You can select members from your address book or create new separate entries.



The notes view allows you to add information to the Distribution List, such as files needed when working with the members of the list.

