

# Outlook 2007 Quick Resource Guide

## Using Outlook Today

### CREATE COMMAND CENTRAL WITH OUTLOOK TODAY

1. In Outlook, select **Advanced Tool Bar**
2. Select **Outlook Today** (house icon top left corner)
3. Select **Customize Outlook Today** (bottom right corner)
4. Check **When starting up, go directly to Outlook Today**
5. Explore **Messages, Calendar, Task and Style** options to customize your Command Central

## Calendaring Techniques

### CREATE AN APPOINTMENT RECEIVED VIA EMAIL

1. Capture an Email with your left click and drag to calendar icon
2. Change subject line to appropriate appointment name
3. Select date, time, etc.
4. Save and close

### CREATE A RECURRING APPOINTMENT

1. Within an appointment, select *Recurrence* from toolbar.
2. Select applicable options.

### MARK AN APPOINTMENT AS PRIVATE

1. Within an appointment, select **lock icon** on the Options Ribbon
2. Save and close
3. Viewers of your calendar will see that the time is filed but not the appointment details

### CREATE A DEPARTMENT CALENDAR

1. In Calendar,
2. Select **File**
3. Select **New**
4. Select **Folder**
5. Name the folder, i.e. Department, District, Team
6. This calendar will now appear in your list of calendars
7. To see the two calendars side by side, click them both
8. Move or copy information between them

### COLOR CODE APPOINTMENTS FOR EASY RECOGNITION

1. In an appointment,
2. Select **Category** from the Options Ribbon
3. Select a category or create a new one
6. Typical categories are conference calls, off site meeting, travel, meeting with supervisor...

### STORE SUPPORTING INFO IN AN APPOINTMENT

1. In the note section of the appointment,
2. Click Insert from the toolbar.
3. File = My documents (Word, Power Point or Excel).
4. Item = Email from Inbox or Personal Folder List.

## Email Processing Techniques

### COLOR CODE INCOMING EMAILS FOR VISUAL ALERTS

1. In your Inbox view
2. Go to the Tools Menu
3. Click the Organize Button (square yellow button)
4. Select "Using Colors" (second tab)
5. Select an Email from a particular person
6. Select a color from drop down menu
7. Apply color

### MOVE ACTIONABLE EMAILS TO TASK LIST

1. Capture Email with right click and hold
2. Drag to the Task icon
3. Select "Copy with attachment" or "Move with attachment"
4. Rename the subject line to begin with a verb.
5. Select a due date and priority if appropriate

### STORE SUPPORTING INFORMATION WITHIN A TASK

1. In the Note section of a task, click "insert" ribbon
2. File = My documents (Word, Power Point or Excel)
3. Item = Email from Inbox or Personal Folder List

### CREATE STEPS WITHIN A TASK: MINI PROJECT

1. Open and name a new task
2. In Notes section list steps within the project
3. Highlight Next Do-able step
4. Drag to subject line
5. Identify due date and priority
6. Save and close
7. Once completed, delete step in subject line
8. Repeat this process with each Do-able step

### BREAK DOWN A LARGER PROJECTS TO CATEGORIES

1. Open a new task
2. In the subject line, identify project by recognizable name
3. Click the "Category" box in the Task Ribbon
4. Choose from available categories
5. Or click "All Category" list to add your own
6. Categorized all task associated with this project
7. View all tasks in a category by clicking category heading

### VIEW TASKS OPTIONS

1. In Tasks, explore viewing options by clicking headings to sort tasks, i.e. click **category** to view all project tasks together or click **date due**
2. Or explore options with the **View** on tool bar

### ASSIGN A TASK

1. In a Task click the **Manage Task** ribbon,
2. Select **Assign**
3. Select **To** and choose from your contact list
4. Check **Keep an updated copy of this task on my Task List**
5. Check **Send me status when task is completed**
6. Create due date and priority
7. Send it as you would and Email

Use this guide as a quick one quick reference to remind and reinforce the Outlook 2007 steps demonstrated in class

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## Contact Management Techniques

### GATHERING EMAIL ADDRESSES

1. Select Email with the left click and drag to Contact icon
2. Outlook will populate contact's name, Email address, and File as fields
3. For individuals with signature information, highlight info and drag to appropriate field (no need to cut and paste)

### ADD CATEGORY TO DISTINGUISH CONTACTS

1. Select **Category** from standard tool bar
2. Choose from available categories or click **All Categories** to create your own
3. To View by category go to:
  4. Go to **View** Menu
  5. Select **Current View**
  6. Select **By Category**
7. To return to Normal view
  8. Go to **View** Menu
  9. Select **Current View**
  10. Select **Phone List** or **Business Cards**

### SEND EMAIL TO AN ENTIRE CATEGORY OF CONTACTS

1. In your contact list,
  2. Go to **View** Menu
  3. Select **Current View**
  4. Select **By Category**
5. Scroll to appropriate category
6. Click the category name
7. Select **Action** button
8. Select **New message to contact**
9. All the contacts in that category will entered in the **To** field of the Email message

### MANIPULATE THE CONTACT LIST VIEW

1. Select **View** button
2. Explore **Current View** options
3. Select view which best enables you to quickly find a particular contacts

### ELECTRONICALLY MAP A CONTACT'S LOCATION

1. Open a particular contact
2. Select the **Yield Sign** (yellow button) on the Tool Bar
3. Outlook will "map" the address on Bing.com
4. Or this location can auto mapped from your smart phone

### TRACK BIRTHDAYS OR ADDITIONAL INFO FOR CONTACT

1. Open a contact
2. On the main Contact Ribbon, select the **Details** tab
3. Enter birthday or special day in the anniversary field
4. Enter info in department, office, profession ,admin or managers name.
5. You can then sort by any of these field
6. Save and Close

## Email Best Practices

### TURN OFF ALARM FEATURE (THE DING)

1. In Outlook on the Tools ribbon
2. Select **Options**
3. Select **Email Options**
4. Select *Advanced Email Options*
5. *Uncheck* the box **Play a sound when an Email arrives**

### USE VOTING BUTTONS FOR QUICK RESPONSE

1. Open a new Email message
2. Click **Options** button from toolbar
3. Click **Use Voting button**
4. Select from drop down menu or select **Custom**
5. Separate each of the custom vote options semi-colon ;

### ADD A PROFESSIONAL "SIGNATURE"

1. In your Inbox screen, select "Tools" menu
2. Select **Options**
3. Select **Mail format**
4. Select **Signatures**
5. Select **New**
6. Type a name for your signature, i.e. business, personal
7. Follow prompts

### USE RULE WIZARD TO AUTO PROCESS EMAILS

1. Right click an Email to be "Rule Wizard"
2. Click "Create a Rule"
3. Check which **When I get and email with all of the selected conditions** is appropriate
  4. **From**
  5. **Subject contains**
  6. **Send to**
7. Check which **Do the following** is appropriate
  8. **Display a new item alert** displays an alert envelope *every time* an Email arrives in your Inbox from the selected individual
  9. **Move to a folder** defaults to Junk Email, but can be set to any folder or create a new on here.
10. Select OK
11. Select **Run this rule now on messages already in the current folder**
12. Select OK

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