Using MS Outlook 2007

MANAGE EMAIL

CREATE FOLDERS

- File menu – Folder – New Folder
- In the dialog enter the name of the folder, and choose the existing folder you want the new folder to appear under
- To move an email to another folder
    - Drag it with the left mouse button down, and drop it on the folder

    Or

    - Right-click on the email and choose 'Move to Folder'; in the dialog select the folder to move it to and click on OK
    - Tip – you can move multiple emails at once (use Ctrl-click to select each email), and then use one of the methods above to move the messages as a group

CREATE RULES TO AUTOMATICALLY DEAL WITH EMAIL

- Tools menu, Rules and Alerts, New Rule
- Select the option you want under 'Stay Organized' – e.g. Move messages with specific words in the subject to a folder
- In the lower portion of the dialog, click on 'specific words'; enter the key word you want to include and click on Add; then click on OK.
- Click on 'specified' in the next line and choose the folder you wish these messages to be automatically moved to; click OK
- Click on Finish

Or

- Right-click on a message that has a sample of the rule criteria you want to create, and choose 'Create Rule'.
- Choose the options you want in the dialog (e.g. Subject contains, and under Do the following Move the item to folder; click on Select Folder and choose the folder)
- Click on OK; you can choose to run the new rule on existing messages in the current folder; and Click OK.

The rule will be applied to any **new** mail you receive. You can run this rule on existing messages by clicking on Tools menu, Rules and Alerts, 'Run Rules Now…', put a check beside the rule, choose the folder to run it in (likely Inbox); click on Run Now.

MANAGE CONTACTS

MANAGE AND ORGANIZE CONTACTS/ADDRESS BOOKS

- You can display the contact list a number of ways; by category, by company, etc.
- To assign a contact to a Category, right-click on the contact and choose Categorize, and select the category. There are 6 categories available, but if you click on All Categories, you can create new categories (up to 25 colours are available)
- You can assign a contact to more than one category.
- Initially these are labeled as a colour, but you can change that label to something more meaningful.

CREATE DISTRIBUTION LISTS

- File, New, Distribution List
- In the Name box type the name for the Group
- Click on the ‘Select Members’ button and add contacts by double-clicking on the names to add to the group
- Click on OK, Click on Save & Close to save the Distribution List
- The Group shows up in the Contacts List in bold, and can be used like any other Contact.
- The Group will also appear in the Address Book when you compose emails; there may also be ‘Global Distribution Lists’ available for everyone to use.

CALENDAR

CREATE APPOINTMENTS

- In either Day or Week view of the Calendar, click on the time slot and type in a subject for the appointment; you can drag the bottom border of the appointment to extend the time; you can move an appointment by dragging it to another day/time on the calendar. A reminder of the appointment is automatically set for 15 minutes before the start, and the time slot is shown as ‘busy’.

Or

- Double-click a time slot to open a detailed view of an appointment (or File, New Appointment); enter the subject, location, start and end times. You can change the default reminder time and other details.
- You can make an appointment recurring by clicking on the Recurrence button and setting the pattern for the recurring appointment.
- An ‘Event’ in Outlook is simply an all-day appointment e.g. anniversary, holiday, etc. You can check the ‘All Day Event’ box in the detailed view of an appointment.

SETUP MEETINGS AND INVITE OTHERS

- File, New, Meeting Request
- Click on Invite Attendees and enter the addresses of people to invite (or click on the To button to select them from your address book)
- Since you are using Exchange Server, you can click on Scheduling and view each attendee's availability, and therefore pick the best time (you won't be able to see the schedule of those outside your server).
- Send the invitation; each invitee will receive an email and they have the opportunity to respond with 'Accept', 'Tentative', 'Decline' or 'Propose New Time'
- When you receive these responses, Outlook will automatically update the meeting information.
- Open the meeting appointment, and click on Tracking to see the status of the responses.
- It is possible that someone will respond with a proposed new time; only the meeting organizer can actually change the meeting details; if you edit anything on a meeting, you'll have the opportunity to send an update to the attendees.