



Microsoft® Office Outlook® 2007 Inside Out

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Working in and Configuring Outlook

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If you've used earlier versions of Microsoft® Outlook®, you'll find that the interface in Microsoft Office Outlook 2007 hasn't changed that much, and you should have no problem getting started. There are, however, some new features and interface enhancements that you will probably like quite a bit. If you're new to Office Outlook 2007 entirely, you need to become familiar with its interface, which is the main focus of this chapter.

Outlook 2007 presents your data using different views, and this chapter shows you how to customize the way those views look. This chapter also examines other standard elements of the interface, including toolbars, the Navigation Pane, the Folder List, and the Reading Pane. You'll also learn how to use multiple Outlook 2007 windows and views and navigate your way through the Outlook 2007 interface.

This chapter looks at the various ways you can configure Outlook 2007, explaining settings that control a broad range of options, from e-mail and spelling to security. In addition, you'll learn about settings in your operating system that affect how Outlook 2007 functions. Where appropriate, the text refers you to other chapters where configuration information is discussed in detail in the context of a particular feature or function.

Web access has been expanded and improved in Outlook 2007, and this chapter examines that Web integration. You'll learn about browsing the Web with Outlook 2007 and about accessing your Microsoft Exchange Server e-mail through a Web browser. Later in the chapter, you'll find a discussion of add-ins, which can enhance Outlook 2007 functionality.

Understanding the Outlook Folders

Outlook 2007 uses a standard set of folders to organize your data. Once you're comfortable working with these standard folders, you'll be able to change their location, customize their appearance, or even create additional folders, as you'll learn throughout this book.

The following list describes the default Outlook 2007 folders:

- **Calendar** This folder contains your schedule, including appointments, meetings, and events.
- **Contacts** This folder stores information about people, such as name, address, phone number, and a wealth of other data.
- **Deleted Items** This folder stores deleted Outlook 2007 items and can contain items of various types (contacts, messages, and tasks, for example). You can recover items from the Deleted Items folder, giving you a way to “undelete” an item if you’ve made a mistake or changed your mind. If you delete an item from this folder, however, the item is deleted permanently.
- **Drafts** Use this folder to store unfinished drafts of messages and other items. For example, you can use the Drafts folder to store a lengthy e-mail message that you haven’t had a chance to finish yet. Or you might start a message, have second thoughts about sending it, and place it in the Drafts folder until you decide whether to send it.
- **Inbox** Outlook 2007 delivers your e-mail to this folder. Keep in mind that, depending on the types of e-mail accounts in your profile, you might have more than one Inbox in locations other than your default information store. For example, if you have an Internet Message Access Protocol (IMAP) account and an Exchange Server account, you’ll have an Inbox folder for each.
- **Journal** The Journal folder stores your journal items, allowing you to keep track of phone calls, time spent on a project, important e-mail messages, and other events and tasks.
- **Junk E-Mail** The Junk E-Mail folder contains items that have been placed there by the Outlook Junk E-Mail Filter. This filter is designed to divert the most obvious spam, and you can customize it to suit your needs.
- **Notes** The Notes folder stores and organizes notes. You can move or copy notes to other folders in Outlook 2007 as well as to folders on disk. You can also create shortcuts to notes.
- **Outbox** The Outbox stores outgoing messages until they are delivered to their destination servers. You can configure Outlook 2007 to deliver messages immediately after you send them or have the messages wait in your Outbox until you process them (by synchronizing with the computer running Exchange Server or by performing a send/receive operation through your Post Office Protocol 3 [POP3] account, for example).
- **RSS Feeds and Subscription** These folders store RSS content. Really Simple Syndication (RSS) is a way for content publishers to make news, blogs, and other content available to subscribers.
- **Sent Items** The Sent Items folder stores copies of the messages you have sent. You can configure Outlook 2007 to automatically store a copy of each sent item in this folder.
- **Tasks** The Tasks folder lists tasks that have been assigned to you or that you have assigned to either yourself or others.

Working with the Standard Outlook Views

Before you can become proficient at using Outlook 2007, you need to be familiar with its standard views and other elements of its interface. This section introduces you to the Outlook 2007 standard views and includes information about how to work with these views and customize them to meet your needs.

Outlook Today

Outlook 2007 provides default views of its standard folders as well as one additional view that is a summary of your schedule, tasks, and e-mail for the current day—Outlook Today. To switch to Outlook Today view if you are working in another folder, click the root folder of your mail store in the Navigation Pane. For example, click Personal Folders if your Outlook 2007 data is stored in a personal folders (.pst) file, or click Mailbox if your data is stored in an Exchange Server mailbox. Figure 4-1 shows a typical Outlook Today view. In the Calendar area on the left, Outlook 2007 summarizes your schedule for the current day, showing each appointment with time and title. You can easily view the details of a particular appointment by clicking the appointment time or title to open it.

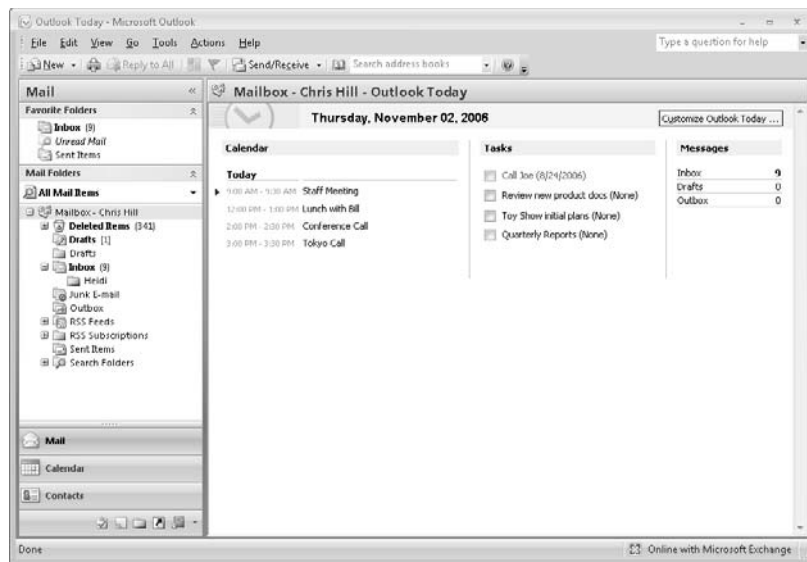


Figure 4-1. Outlook Today lets you see your day at a glance.

In the Tasks area, Outlook Today lists your tasks for the current day, including overlapping tasks with a duration of more than one day. The list includes a title and completion date for each task, along with a check box. You can mark the task as completed by selecting the check box; doing so crosses out the task in the list. If the check box is cleared, the task is incomplete.

In the Messages area, Outlook Today lists the number of messages in your Inbox, Drafts, and Outbox folders. If the number appears in bold, the associated folder contains unread messages.

For details on customizing the Outlook Today view to display additional information (including the use of HTML code in such customization), see Chapter 26, “Customizing the Outlook Interface.”

Inbox

The Inbox displays your default message store, as shown in Figure 4-2. For example, if you use an Exchange Server account and store your data on the computer running Exchange Server, the Inbox view shows the Inbox folder on that computer. If you’ve configured Outlook 2007 to deliver messages to a local store (such as a .pst file), the Inbox view shows the contents of the Inbox folder in that store.

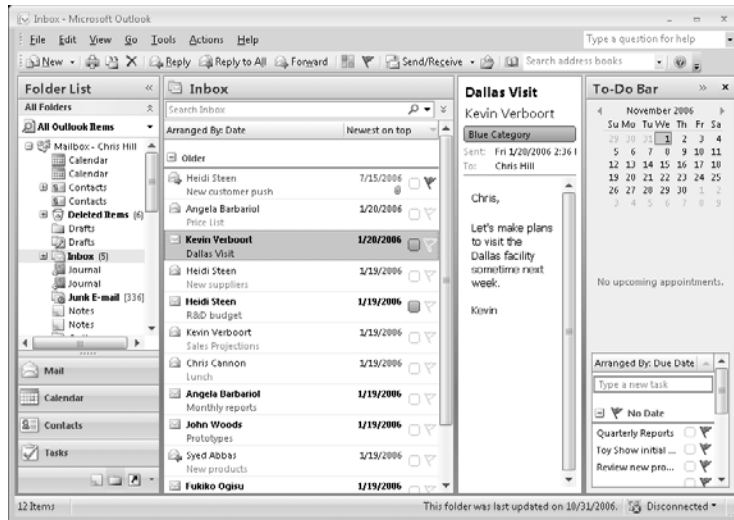


Figure 4-2. The Inbox view shows the contents of the Inbox folder of your default store.

As you can see in Figure 4-2, the Inbox view shows the message header for each message, including such information as sender, subject, and date and time received in various columns. These columns are not always visible, however, because the default configuration includes the Reading Pane on the right in the Outlook 2007 window, which hides many of the columns on a typical display. If you turn off the Reading Pane or move it to the bottom of the window, you can view the message header columns.

You can easily sort messages by clicking on the column header for the column you want to use as the sort criterion. For example, to quickly locate messages from a specific sender, you can click the From column header to sort the list alphabetically by sender. To switch between ascending and descending sort, simply click the column header

again. An up arrow next to the column name indicates an ascending sort (such as A to Z), and a down arrow indicates a descending sort (such as Z to A).

To learn how to add and remove columns and change their appearance and order, see “Customizing the Inbox View” later in this chapter.

By default, Outlook 2007 shows the following columns in the Inbox view when the Reading Pane is either off, displayed at the bottom of the window, or taking a minimal amount of space on the right in the window:

- **Importance** This column indicates the level of importance, or priority, that the sender has assigned to a message—Low, Normal, or High. A high-priority message is accompanied by an exclamation point, whereas a down arrow marks a low-priority message. No symbol is displayed for a message of normal importance.

Note

After you’ve received a message, you can change its priority status by right-clicking the message header, choosing Message Options, and then specifying a new importance level.

- **Icon** The Icon column indicates the type of message and its status. For example, unopened messages are accompanied by a closed envelope icon, and opened messages are accompanied by an open envelope icon.
- **Attachment** The Attachment column displays a paper clip icon if the message includes one or more attachments. Right-click a message and choose View Attachments to view the attachments, or simply double-click an attachment in the Reading Pane.

CAUTION !

Although Outlook 2007 provides protection against viruses and worms by preventing you from opening certain types of attachments, this is no guarantee against infection. Your network administrator might have modified the blocked attachments lists, or you might have modified your blocked attachments list locally, to allow a specific attachment type susceptible to infection to come through. So you should still exercise caution when viewing attachments, particularly from unknown sources. It’s a good practice to save attachments to disk and run a virus scan on them before opening them.

- **From** This column shows the name or address of the sender.
- **Subject** This column shows the subject, if any, assigned by the sender to the message.

- **Received** This column indicates the date and time that Outlook 2007 received the message.
- **Size** This column indicates the overall size of the message, including attachments.
- **Categories** This column shows the color indicators for color categories assigned to the message..
- **Flag Status** In this column, you can flag messages for follow-up action. For example, you can flag a message that requires you to place a call, to forward the message, or to respond at a particular time. You specify the action, date, and time for follow-up.

For detailed information about flagging messages for follow-up and other ways to manage and process messages, see “Flagging and Monitoring Messages and Contacts” in Chapter 10.

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Time is relative

The date and time displayed in the Inbox’s Received column can be a little deceiving. This data reflects the time the message was placed in your message store. If you’re working online with an Exchange Server account, for example, Outlook 2007 shows the time the message was placed in the Inbox folder for your mailbox on the computer running Exchange Server. If the time on your computer isn’t coordinated with the time on the server, the time you actually receive the message could be different from the time reflected in the message header. For sent messages (in the Sent Items folder), the time indicated is the time the message was placed in your Outbox. If you’re working offline, that time could differ from the time the message is actually sent.

Previewing Messages

Another part of the Inbox view is the Reading Pane, which appears on the right in the Inbox view. You can use the Reading Pane to preview messages without opening them in a separate window. The scroll bar on the right of the Reading Pane lets you scroll through the message. The top of the Reading Pane presents information about the message, such as sender, recipient, subject, and attachments.

You can double-click most of the items in the Reading Pane header to see detailed information about the items. For example, you can double-click the name of the sender to display information about the sender, as shown in Figure 4-3. Use this method to quickly copy contact information about the sender from the message to your Personal Address Book. You can also double-click attachments to open them. Right-clicking an item opens its shortcut menu, on which you can choose a variety of actions to perform on the item—for instance, you can right-click an attachment and choose Save As to save the attachment to disk. Experiment by right-clicking items in the Reading Pane to see which actions you can take for specific items.

Note

The information that Outlook 2007 displays when you double-click the name of the sender of an e-mail message in the Reading Pane depends on whether the sender is in your Contacts folder, in the Global Address List (GAL; Exchange Server accounts), or not in either.

The screenshot shows a contact information window titled "Heidi Steen". It has several tabs: "General", "Organization", "Phone/Notes", "Member Of", and "E-mail Addresses". The "General" tab is selected. The form contains the following fields:

- Name:**
 - First: Heidi
 - Initials: (empty)
 - Last: Steen
- Display:** Heidi Steen
- Alias:** hsteen
- Address:** (empty)
- Title:** (empty)
- Company:** (empty)
- City:** (empty)
- Department:** (empty)
- State:** (empty)
- Office:** (empty)
- Zip code:** (empty)
- Assistant:** (empty)
- Country/Region:** (empty)
- Phone:** (empty)

At the bottom left is a button labeled "Add to Contacts". At the bottom right are buttons labeled "OK", "Cancel", and "Apply".

Figure 4-3. After you double-click a sender's address in the Reading Pane, Outlook displays information about the sender.

Note

If a message has been flagged for follow-up, information about the follow-up (the specific action, the date due, and so on) also appears in the Reading Pane header.

Note

To turn the Reading Pane on or off, choose View, Reading Pane, and then choose Right, Bottom, or Off. To change the location of the Reading Pane, choose View, Reading Pane, and then choose Right or Bottom.

For detailed information about using and customizing the Reading Pane in various folders, see "Using the Reading Pane" later in this chapter.

The AutoPreview feature also allows you to preview your messages. With message folders such as the Inbox, AutoPreview displays the first few lines of a message below its message header in the main folder window. This leaves you free to preview the first few lines of a message without opening the message or even selecting it. You can use AutoPreview in conjunction with or instead of the Reading Pane.

For additional information about configuring and using AutoPreview, see “Using AutoPreview” later in this chapter.

Customizing the Inbox View

Outlook 2007 offers a wealth of settings that you can use to control messaging. In addition, you also have quite a bit of control over the appearance of the Inbox and other message folders. For example, you can change the column headings included in the Inbox or add and remove columns. The following sections explore specific ways to customize the Inbox (which apply to other message folders as well).

For detailed information about configuring messaging and other options, see “Configuring Outlook Options” later in this chapter.

Adding and Removing Columns

By default, Outlook 2007 displays only a small subset of the available fields for messages. You can add columns for other fields, such as CC or Sensitivity, to show additional information. However, the Inbox behaves differently depending on the location of the Reading Pane. In most cases, when the Reading Pane is positioned on the right side of the window, the Inbox includes only four columns. The first column shows the sender and message subject. The other three columns list the message received date, color category, and flag status.

Outlook 2007 also provides two column headers above these columns that you can use to change views or change sort order. For example, the default view is Arranged By: Date. You can click this header to choose a different property by which to group the view.

The other column header is either Newest On Top or Oldest On Top, depending on whether the folder is sorted in ascending or descending order. You can click this column to switch between the two.

The number of columns in the message pane depends on the amount of space available in the window. The more space available, the more columns Outlook 2007 displays. For example, continue to drag the left edge of the Reading Pane to the right, and Outlook 2007 eventually shows additional columns. You have to experiment with the size of the Reading Pane to find a layout that suits you, because the amount of available space

depends on your system's display resolution. Or simply position the Reading Pane at the bottom of the window to maximize the amount of space available for message pane columns.

To add and remove columns, follow these steps:

1. Open the folder you want to modify, right-click the column header bar, and choose Field Chooser to display the Field Chooser dialog box, shown in Figure 4-4.

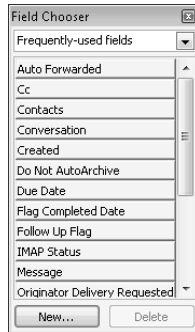


Figure 4-4. Add or remove columns by using the Field Chooser dialog box.

2. Locate the name of the field you want to add, and then drag the field from the Field Chooser dialog box to the desired location on the column header bar. Outlook 2007 displays a red arrow at the top of the column header bar to indicate where the column will be inserted.
3. Add other fields as necessary.
4. To remove a field, drag the field from the column header bar.
5. Close the Field Chooser dialog box.

You can choose other types of fields by selecting a type from the drop-down list at the top of the Field Chooser dialog box. You can also use this dialog box to create custom fields.

Outlook 2007 also provides another method for adding and removing columns in message folders:

1. Choose View, Current View, Customize Current View, and then click Fields to display the Show Fields dialog box, as shown in Figure 4-5.

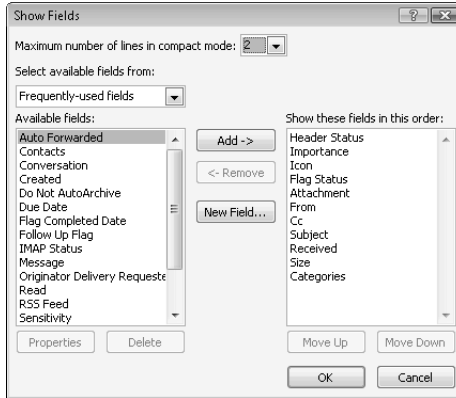


Figure 4-5. You can also use the Show Fields dialog box to add or remove columns.

2. To add a column, select the field in the Available Fields list, and then click Add.
3. To remove a column from the folder view, select the field in the Show These Fields In This Order list, and then click Remove.
4. Click OK to have your changes take effect.
5. Click OK to close the Custom View dialog box.

Changing Column Order

In a message folder, Outlook 2007 displays columns in a specific order by default, but you can easily change the order. The simplest way is to drag a column header to the desired location. You also can right-click the column header bar, choose *Customize Current View*, click *Fields* to display the Show Fields dialog box (shown earlier in Figure 4-5), and then use the *Move Up* and *Move Down* buttons to change the column order.

Changing Column Names

Outlook 2007 uses a default set of names for the columns it displays in message folders. However, you can change those column names—for example, you might want to rename the *From* column to *Sender*.

To change a column name, follow these steps:

1. Right-click the column header bar, and then choose *Format Columns* to display the *Format Columns* dialog box, shown in Figure 4-6. If the *Format Columns* command is not available because of the Reading Pane's location and width, choose *View, Arrange By, Custom*, and then click *Format Columns*.

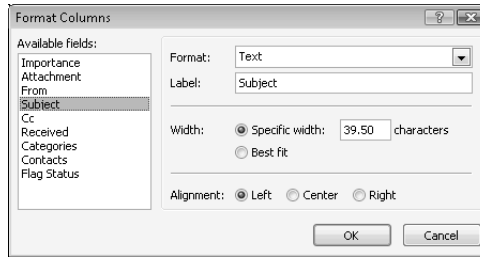


Figure 4-6. You can change several column characteristics, including column header name.

2. In the Available Fields list, select the field for which you want to change the column header.
3. In the Label box, type the label you want displayed in the column header for the selected field.
4. Repeat steps 2 and 3 for the other fields you want to change.
5. Click OK to apply the changes.
6. Click OK to close the Custom View dialog box.

Note

Three columns will not allow you to change the label: Importance, Flag Status, and Attachment. However, you can switch between using a symbol or text in the Importance and Flag Status columns. You can change the Attachment column to display either a paper clip icon or the text True/False, On/Off, or Yes/No, depending on whether the message has an attachment.

Changing Column Width

If a column isn't wide enough to show all the information for the field or if you need to make room for more columns, you might want to change the column width. The easiest way to change the width of a column is to drag the edge of the column header in the column header bar to resize it. Alternatively, you can right-click the column header bar, choose Format Columns, and specify a column width in the Format Columns dialog box (shown earlier in Figure 4-6).

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Automatically size columns

Use the Best Fit option in the Format Columns dialog box to automatically size the selected column based on the amount of data it needs to display. You can also right-click a column and choose Best Fit. Outlook 2007 examines the data for the field in the existing messages and resizes the column accordingly.

Changing Column Alignment

By default, all the columns are left-aligned in message folders, including the Inbox. You can, however, configure the alignment to display the columns as left-justified, right-justified, or centered. For example, you might want to change the format for the Size column to show only numbers and then display the column right-justified. Simply right-click the column header bar and choose Format Columns, or choose View, Arrange By, Custom and then click Format Columns. In the Format Columns dialog box (shown earlier in Figure 4-6), select the column to change, and then under the Alignment option, select Left, Center, or Right, depending on the type of justification you want.

Changing Column Data Format

Each default column in a message folder displays its data using a particular format. For example, the From column shows only the sender, not the recipient. Although in most cases, the specified recipient is you, that isn't the case when the message you've received is a carbon copy. You might then want to change the data format of the From column to also display the person specified in the To field of the message. Other columns also offer different formats. For example, you can change the data format used by time and date fields such as Received or Sent to show only the date rather than date and time.

To change the data format used for a particular column, right-click the column header bar and choose Format Columns, or choose View, Arrange By, Custom and then click Format Columns. In the Format Columns dialog box (shown earlier in Figure 4-6), select the column for which you want to change the format, and then select the format in the Format drop-down list. The available formats vary according to the field selected.

Grouping Messages

Outlook 2007 offers many ways to organize and display your data. A good example of this flexibility is the option of grouping messages based on a hierarchy of criteria. For example, you might want to group messages in your Inbox first by subject, then by sender, and then by date received, as shown in Figure 4-7.

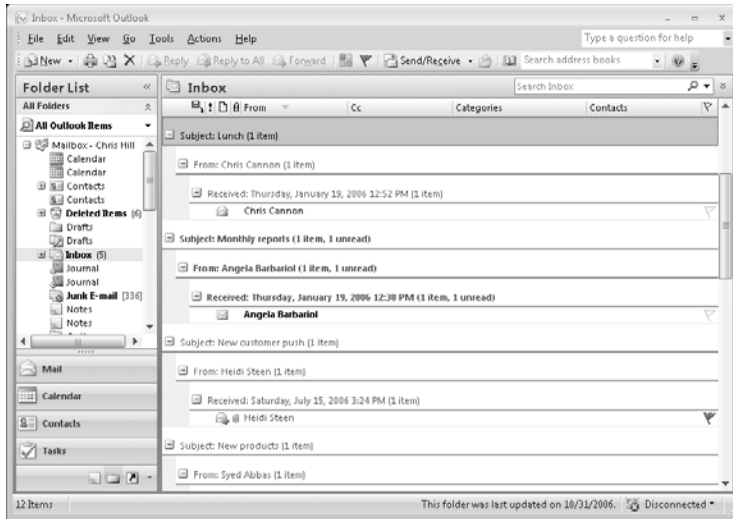


Figure 4-7. These messages are organized by three fields.

To organize your messages based on a particular column, you can simply right-click the column and choose **Group By This Field**. If the folder is showing the **Arranged By** column, click this column, and then choose the field by which you want to group the messages.

For more complex groupings, follow these steps:

1. Right-click the column header bar, and then choose **Group By Box** to display the **Group By** box above the column header bar.
2. To set up a grouping, drag a column header from the column header bar to the **Group By** box.
3. To set up an additional level of grouping, drag another column header to the **Group By** box. Repeat this process until you have as many levels of grouping as you need.

Note

If you are unable to drag an additional column to the **Group By** box, choose **Arrange By** on the **View** menu, and then clear the **Show In Groups** check box.

4. To remove a grouping, drag the column header from the **Group By** box to the desired location on the column header bar.

To hide or show the Group By box, right-click the column header bar, and then choose Group By Box again. To expand or collapse your view of a group of messages, click the plus sign (+) or minus sign (–) next to the group or message.

For a detailed explanation of grouping and sorting, along with several other topics that will help you organize your data, see “Grouping Messages by Customizing the Folder View” in Chapter 10.

Calendar

In the Calendar folder, you can look at your schedule in several different ways. By default, Calendar view shows the current day’s schedule as well as the Date Navigator (a monthly calendar) in the upper-left corner of the Navigation Pane. It also shows the To-Do Bar, which displays tasks that overlap or fall on the current day, as shown in Figure 4-8. With the To-Do Bar turned on, the Date Navigator moves to the upper-right corner of the To-Do Bar. You can configure the To-Do Bar to show other tasks as well. In addition, the Daily Task List can appear at the bottom of the window in Day and Week views.

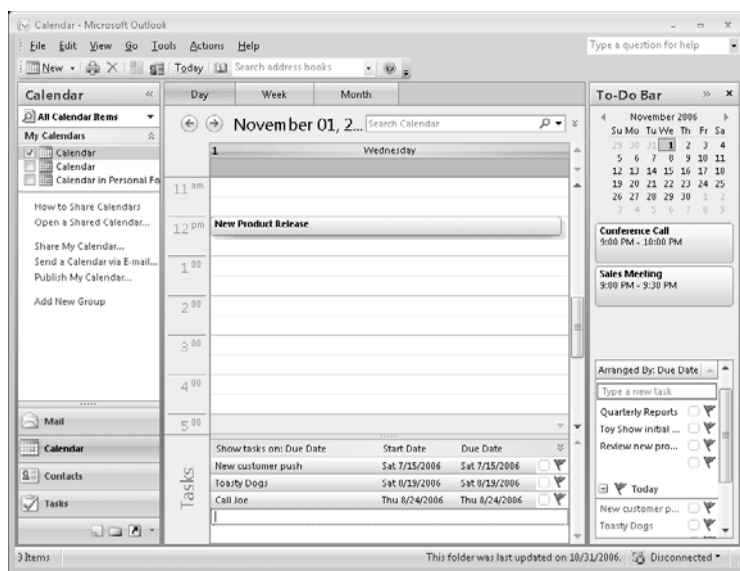


Figure 4-8. The default Calendar view shows your schedule and the Date Navigator, but you can also view tasks, as shown here.

Your schedule shows the subject for each scheduled item—a brief description of a meeting or an appointment, for example—next to its time slot, blocking out the time assigned to the item. Items that overlap in the schedule are displayed side by side, as shown in Figure 4-9.

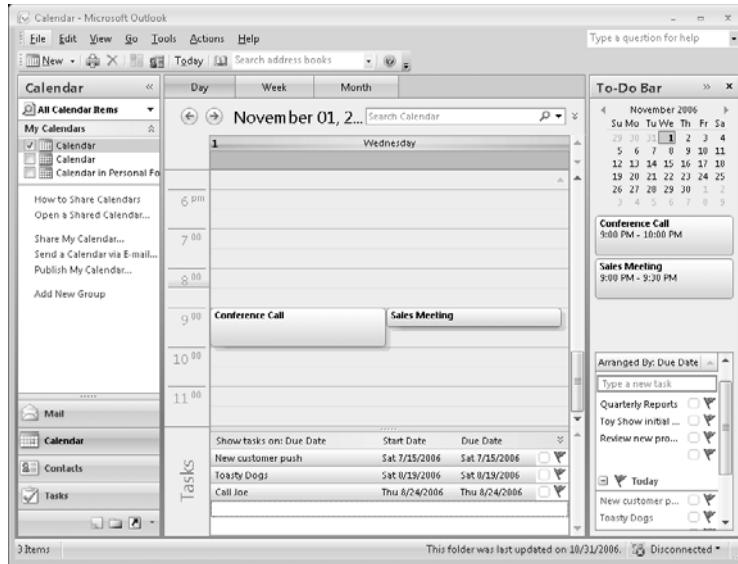


Figure 4-9. Overlapping items appear side by side in your schedule.

Working with the Schedule

Calendar view by default shows only the subject for each item scheduled in the period displayed. You can open the item to modify it or view details about it by double-clicking the item, which opens its form, as shown in Figure 4-10.

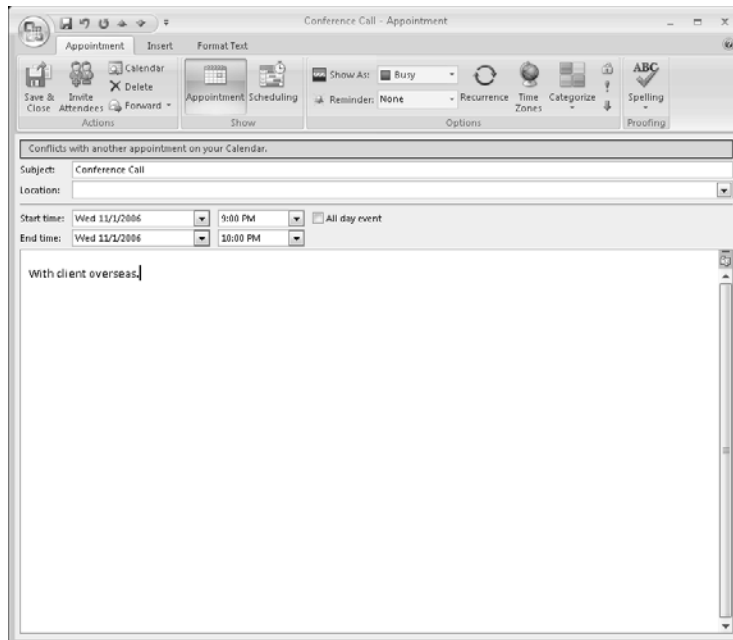


Figure 4-10. A sample appointment form showing details for a selected appointment.

You can add an item to your schedule using one of these methods:

- Double-click the time slot of the start time you want to assign to the item.
- Right-click a time slot, and then choose the type of item to create (an appointment, a meeting, or an event).
- Select a time slot, and then choose File, New to select the item type.
- Click the arrow next to New on the Standard toolbar, and then select the item type.

The first method opens an appointment form. The form opened by the other three methods depends on the type of item you select.

It is also easy to change the start or end time for an item in the schedule. To move an item to a different time without changing its duration, simply drag the item to the new time slot. To change the start or end time only, position the mouse pointer on the top or bottom edge of the item, and then drag it to the desired time.

Using the Calendar's Reading Pane

Like the Inbox and other message views, Calendar view has a Reading Pane that lets you preview appointments and other items in your schedule without opening them. To turn the Reading Pane on or off, choose View, Reading Pane, and then choose either Right, Bottom, or Off. Click the item to display it in the Reading Pane, as shown in Figure 4-11. To display more or less information in the pane, drag the edge of the Reading Pane to resize it. You can also make other changes to the displayed item—such as subject and times—through the Reading Pane.

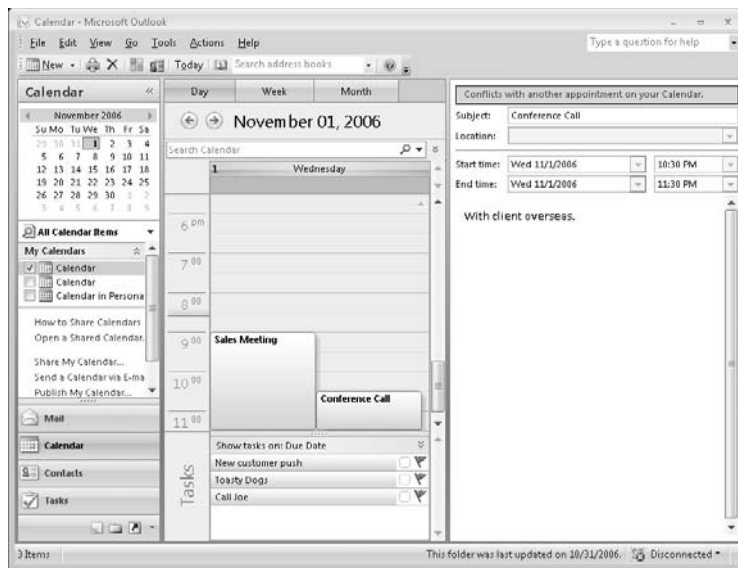


Figure 4-11. Use the Reading Pane in the Calendar view to preview scheduled items.

Using the Task List

The Task List displays a list of your tasks in the To-Do Bar. You can turn the Task List on or off in the To-Do Bar. If the To-Do Bar is not shown, click View, To-Do Bar, and then click Normal or Minimized. By default, the Task List shows the tasks for the current day. As you can in the Inbox and other views, you can change the options and the items displayed in the To-Do Bar: right-click the To-Do Bar column header bar, and then choose the items you want to include, or choose Options to customize how these items are displayed.

For more information about the To-Do Bar and the features Outlook 2007 provides for working with and assigning tasks, see Chapter 22, "Managing Your Tasks."

Using the Date Navigator

The monthly calendars in the upper-right area of the To-Do Bar are collectively called the Date Navigator. When the To-Do Bar is hidden, the Date Navigator appears at the top of the Navigation Pane.

The Date Navigator is useful not only as a calendar but also as a way to provide a fast glance at which days include appointments. Days with a scheduled item appear in bold, and those without scheduled items appear in a normal font. You can view a particular day by clicking it. Click the arrow at the left or right of the Date Navigator to change which months are displayed. You can also click and hold on the column header bar above either month to choose from a shortcut menu which month to view.

INSIDE OUT

Specify the Date Navigator's font

You can configure the Date Navigator to display all dates in normal text rather than using bold for days that contain items. Choose View, Current View, Customize Current View, and then click Other Settings. Clear the Bolded Dates In Date Navigator Represent Days Containing Items check box, and then click OK. Click OK to close the dialog box.

You can change the number of months displayed by the Date Navigator by resizing the Reading Pane, resizing the Calendar pane, changing the width of the Navigation Pane or the To-Do Bar, or changing the font used by the Date Navigator. Assign a smaller font to show more months. (For details on how to change the Date Navigator's font, see "Setting Advanced Options" later in this chapter.)

Customizing the Calendar View

Although the default Calendar view shows only the subject for a scheduled item, you can configure the view to show additional detail—or you can change the view completely. For example, you can switch from a daily view to one that shows the work week, the

calendar week, or the month. You can see examples of Work Week view in Figure 4-12, Week view in Figure 4-13, and Month view in Figure 4-14. To select a particular view, click the Day, Week, or Month button above the Calendar pane. Or choose View, and then choose Day, Work Week, Week, or Month, according to the type of view you want.

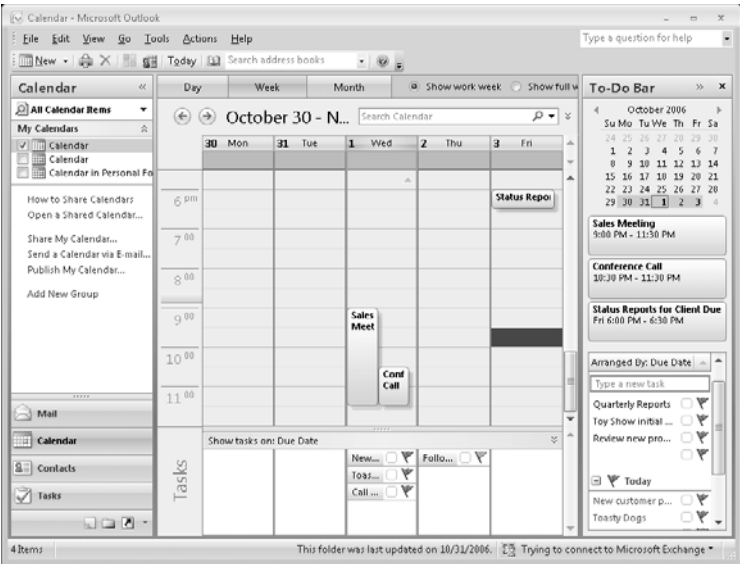


Figure 4-12. Use Work Week view to organize your work schedule.

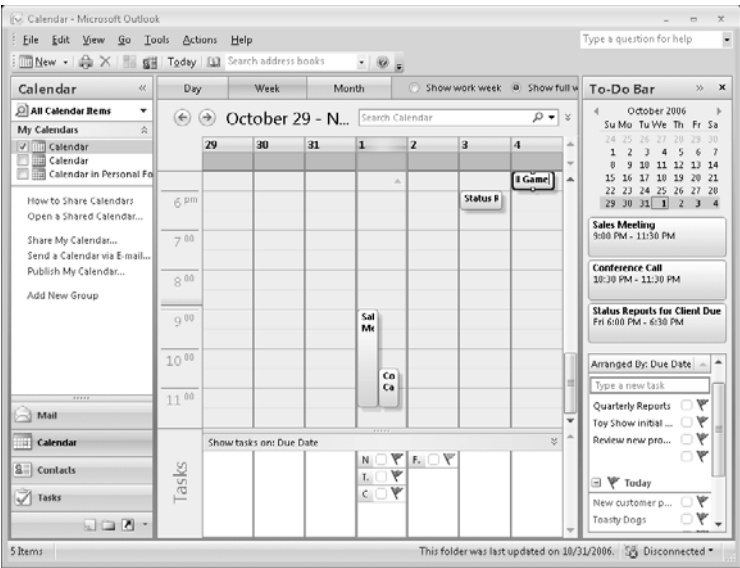


Figure 4-13. Week view can help you plan your entire week, both personal and work time.

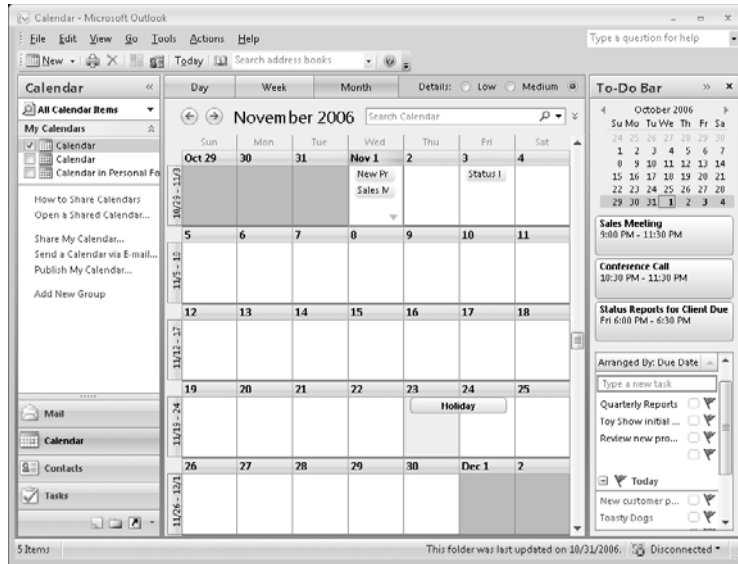


Figure 4-14. Use Month view to plan a broader range of time.

You have additional options for viewing your schedule in the Calendar folder. Choose View, Current View, and then choose one of the following to change the view:

- **Day/Week/Month** Shows the item title only in each view (Day, Work Week, Week, or Month).
- **Day/Week/Month With AutoPreview** Includes AutoPreview in Day and Work Week views. With AutoPreview, Outlook 2007 displays as much of the data for the item as possible in the current view.
- **All Appointments** Shows all appointments.
- **Active Appointments** Shows only active appointments.
- **Events** Shows only events.
- **Annual Events** Shows only annual events.
- **Recurring Appointments** Displays recurring appointments.
- **By Category** Displays scheduled items grouped according to their assigned categories.
- **Outlook Data Files** Displays items organized by the Outlook 2007 data file in which they are stored.

For additional information about customizing the way Outlook 2007 displays information in the various calendar views, see Chapter 20, “Scheduling Appointments.”

Contacts

The Contacts folder stores all your contact information. By default, the Contacts folder displays the Business Cards view, shown in Figure 4-15, which shows the name for each contact along with other selected fields (address and phone number, for example). You can view the details for a contact by double-clicking the contact's business card, which opens the contact form, shown in Figure 4-16. Using this form, you can view or make changes to the contact's data or perform other tasks, such as calling the contact, generating a meeting request, or viewing a map of the contact's address. If you have a large number of contact entries stored in the Contacts folder, you can click the buttons at the right edge of the view to select which portion of the contacts list to show.

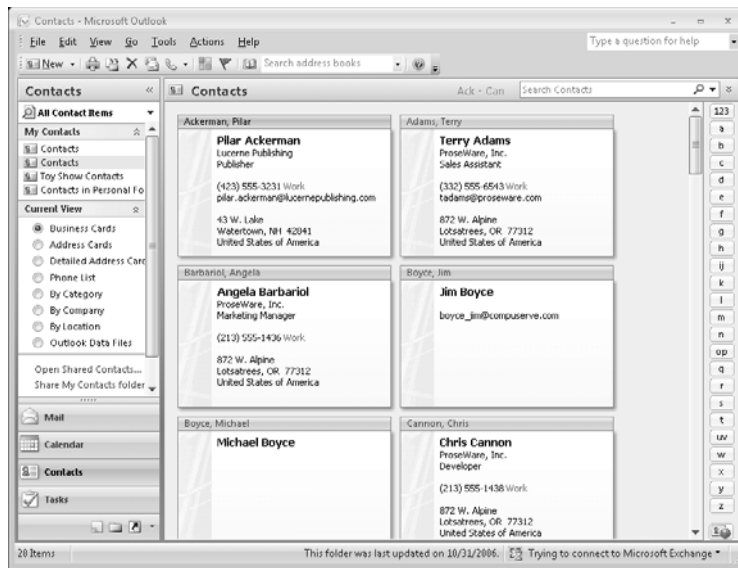


Figure 4-15. By default, the Contacts folder displays Business Cards view.

For a detailed discussion of working with contacts, including the actions you can take with the contact form, see Chapter 18, “Creating and Managing Your Contacts.”

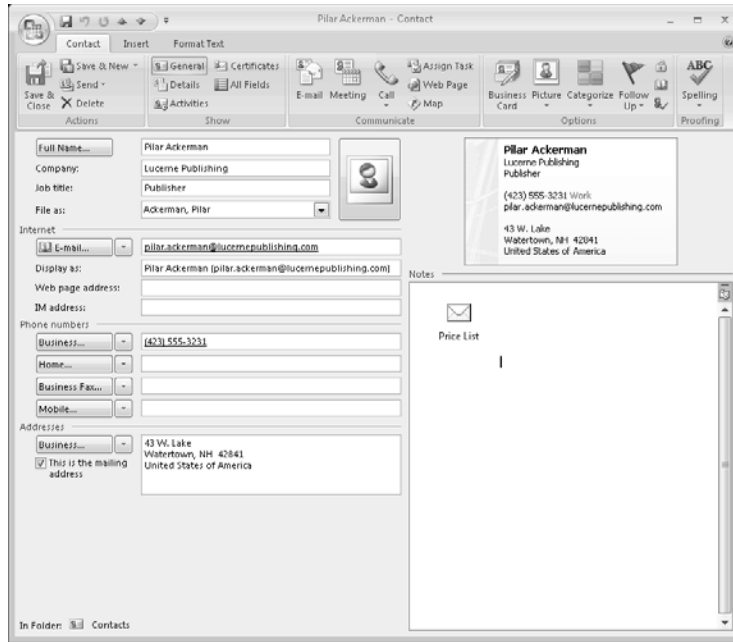


Figure 4-16. When you double-click a contact entry, you can view the contact form for that person.

Outlook 2007 offers several other ways to view the contents of your Contacts folder. Choose View, Current View, and then choose one of the following commands to change the view:

- **Business Cards** Shows the contact information as a virtual business card.
- **Address Cards** Displays the name of each contact along with address and telephone information.
- **Detailed Address Cards** Shows additional detailed information for each contact, including the person's title, the company the person works for, personal notes, and more.
- **Phone List** Displays the contacts as a phone list.
- **By Category** Groups contacts by their assigned categories.
- **By Company** Groups contacts by the company with which they're affiliated.
- **By Location** Groups contacts by country or region.
- **Outlook Data Files** Groups contacts by the Outlook 2007 data file (*.pst) in which the contacts are stored.

Adding contact entries to your Contacts folder is easy: choose File, New and then choose Contact, or click New on the toolbar. Either action opens the contact form, in which you enter the contact's data.

Customizing the Contacts View

Like other views in other folders, the view in the Contacts folder can be customized to suit your needs and preferences. For example, you can adjust the view to display additional fields of information or to remove fields you don't need. You can sort the view based on specific contact criteria or group similar items together based on multiple criteria. For details about customizing the Contacts view, see Chapter 18, "Creating and Managing Your Contacts."

Tasks

The Tasks folder contains your task list. The default Tasks view, shown in Figure 4-17, lists each task in a simple list with subject, due date, and status. Double-click an existing task to open the task form, which displays detailed information about the task, including due date, start date, status, notes, and so on, as shown in Figure 4-18. To add a new task to the list, double-click a blank list entry to open a new task form, where you can enter all the details about the task.

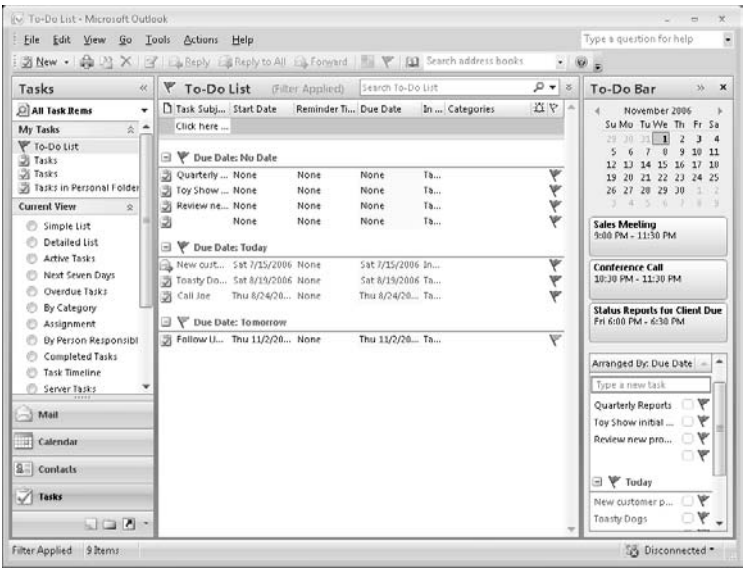


Figure 4-17. By default, the Tasks folder displays this view.

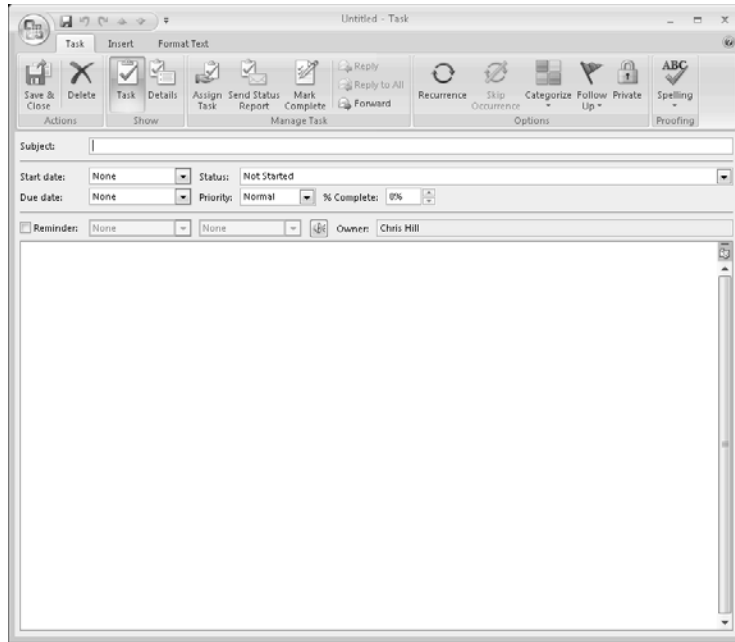


Figure 4-18. Use a task form to create a new task.

The task list shows tasks that you have assigned to others as well as those tasks assigned to you (by yourself or by others). These assignments can be one-time or recurring, and the list shows both in-progress and completed tasks. Additionally, any messages that you have flagged for follow-up appear in your task list.

Like other Outlook 2007 views, Tasks view provides a Reading Pane that you can use to view details for a task without opening the task item. To display the Reading Pane, choose View, Reading Pane, and then specify the location (either Right or Bottom). AutoPreview is also available in the Tasks folder; it displays notes about the task below the task name, as shown in Figure 4-19. To enable AutoPreview, click View, AutoPreview.

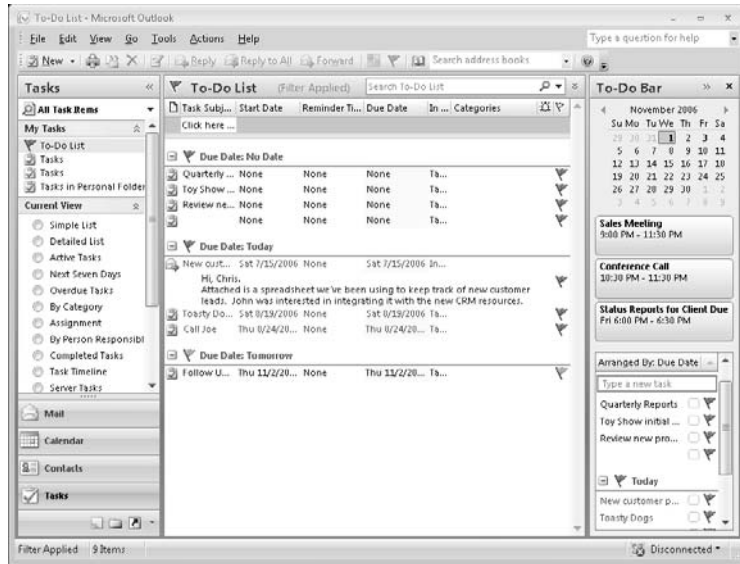


Figure 4-19. AutoPreview displays additional information about a task below the task name in the list.

Customizing the Tasks View

You can customize the view in the Tasks folder in a variety of ways—adding and removing columns, changing column names, or organizing tasks by category or other properties, to list a few. To customize the columns, right-click the column header bar, and then choose Format Columns. The resulting dialog box allows you to select the format for each column, change the name, apply alignment, and so on. To change the order of columns in the view, simply drag the column headers into the desired positions, resizing as needed.

You can also organize your task list in various ways. You can click column headers to sort the columns in ascending or descending order, and you can group the columns based on a particular field or group of fields, just as you can in the Inbox and other Outlook 2007 folders.

You can also choose View, Current View and then choose one of the following commands to change the Tasks view:

- **Simple List** Shows whether the task has been completed, the task name, the folder location of the task, and the due date.
- **Detailed List** Shows status, percent complete, and categories in addition to the information displayed in Simple List view.
- **Active Tasks** Displays tasks that are active.
- **Next Seven Days** Displays tasks scheduled for the next seven days.
- **Overdue Tasks** Displays incomplete tasks with due dates that have passed.

- **By Category** Organizes the task list by the categories assigned to tasks.
- **Assignment** Shows the tasks assigned to specific people.
- **By Person Responsible** Groups the view according to the person responsible for the various tasks.
- **Completed Tasks** Shows only completed tasks.
- **Task Timeline** Displays a timeline of all tasks.
- **Server Tasks** With Exchange Server accounts, helps you view assigned tasks.
- **Outlook Data Files** Displays tasks organized by Outlook 2007 data file location.
- **To-Do List** Displays tasks in the To-Do List with a Reading Pane.

For more information about customizing the view in the Tasks folder, see “Working with the Tasks Folder” in Chapter 22.

Notes

With its Notes feature, Outlook 2007 helps you organize your thoughts and tasks. Each note can function as a stand-alone window, allowing you to view notes on your desktop outside Outlook 2007. The Notes pane provides a look into your Notes folder, where your notes are initially stored. From there, you can copy or move your notes to other locations (such as the desktop) or create shortcuts to them. By default, the initial Notes pane displays the notes as icons, with the first line of the note serving as the title under the note’s icon, as shown in Figure 4-20.

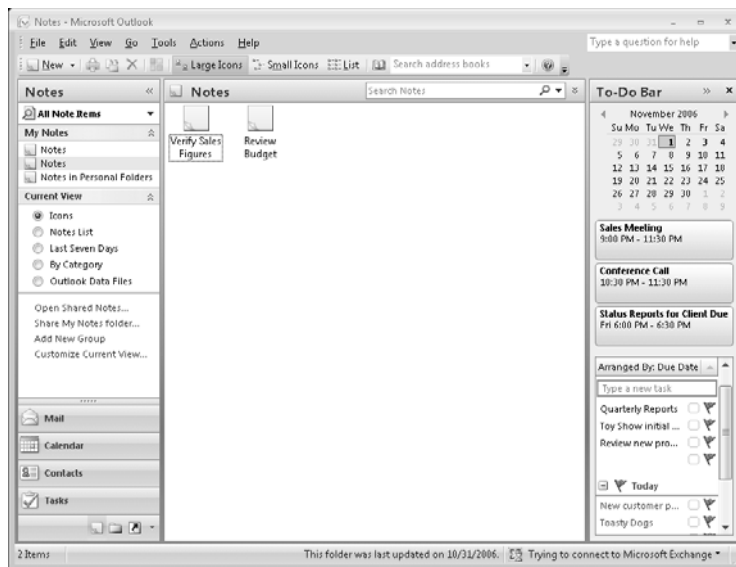


Figure 4-20. The standard Notes pane displays notes as icons.

As it does for other options, Outlook 2007 offers several other ways to view notes. You can select a view by choosing it in the Current View section in the Navigation Pane. You can also choose View, Current View, and then choose one of the following:

- **Icons** Displays an icon for each note, with the first line of the note serving as the icon's description (the default view).
- **Notes List** Displays the notes as a line-by-line list.
- **Last Seven Days** Resembles Notes List view but restricts the display to only the past seven days and is based on the current date.
- **By Category** Groups the notes by their assigned categories.
- **Outlook Data Files** Groups the notes by Outlook 2007 data file location.

You can show the Reading Pane in the Notes folder, displaying the text of a note when you click it in the list. You can also use AutoPreview in Notes List and Last Seven Days views to automatically display the contents of each note. To view the Notes List and Last Seven Days options, choose View, Current View, and then make your selection.

You can customize the views in the Notes folder the same way you can in other folders. You can, for example, drag columns to rearrange them, resize columns, change column names and other properties, add other fields, and group notes based on various criteria.

For a detailed explanation of how to work with the Notes folder, see Chapter 24, "Making Notes."

Deleted Items

The Deleted Items folder contains Outlook 2007 items that you have deleted, and it can include all the Outlook 2007 item types (such as messages, contacts, and appointments). The Deleted Items folder offers a way for you to recover items you've deleted, because the items remain in the folder until you manually delete them from that location or allow Outlook 2007 to clean out the folder. When you delete an item from the Deleted Items folder, that item is deleted permanently.

You can configure Outlook 2007 to automatically delete all items from the Deleted Items folder when you exit Outlook 2007. To do so, choose Tools, Options, and then click Other. Select the Empty The Deleted Items Folder Upon Exiting check box, and then click OK.

Choosing the Startup View

You might want to change the default Outlook 2007 view based on your type of work and the Outlook 2007 folders you use most. Or you might want to use a particular view as the initial view because it presents the information you need right away each morning to start your workday.

You can designate any of the Outlook 2007 folders as your startup view. To do so, follow these steps:

1. In Outlook 2007, choose Tools, Options.
2. Click the Other tab, and then click Advanced Options.
3. Next to the Startup In This Folder text box, click Browse, and then select the folder you want to see by default when Outlook 2007 starts. Click the Mailbox or Personal Folders branch if you want to specify Outlook Today as the default view.
4. Click OK, and then click OK again to close the Options dialog box.

Using Other Outlook Features

In addition to the various folders and views described in this chapter, Outlook 2007 incorporates several other standard components in its interface. The following sections explain these features and how to use them effectively.

Note

This book assumes that you're familiar with your operating system and comfortable using menus. Therefore, neither the Outlook 2007 menu bar nor its individual menus are discussed in this chapter. Specific menus and commands are covered where applicable.

Outlook 2007 uses personalized menus, displaying only those menu items you've used most recently. You can click the double arrow at the bottom of a menu to see all of its commands. Although personalized menus unclutter the interface, they can be annoying if you prefer to see all available commands or are searching for a specific command that isn't displayed. To display all menu commands on a specific menu or toolbar, right-click the menu or toolbar, and then choose Customize. On the Options tab, select Always Show Full Menus.

Using the Navigation Pane

The Navigation Pane appears on the left in the Outlook 2007 window and contains shortcuts to the standard Outlook 2007 folders as well as shortcuts to folders you've created and other important data folders, as shown in Figure 4-21. Just click an icon in the Navigation Pane to open that folder or item. The Navigation Pane gives you quick access not only to Outlook 2007 folders but also to all your data.

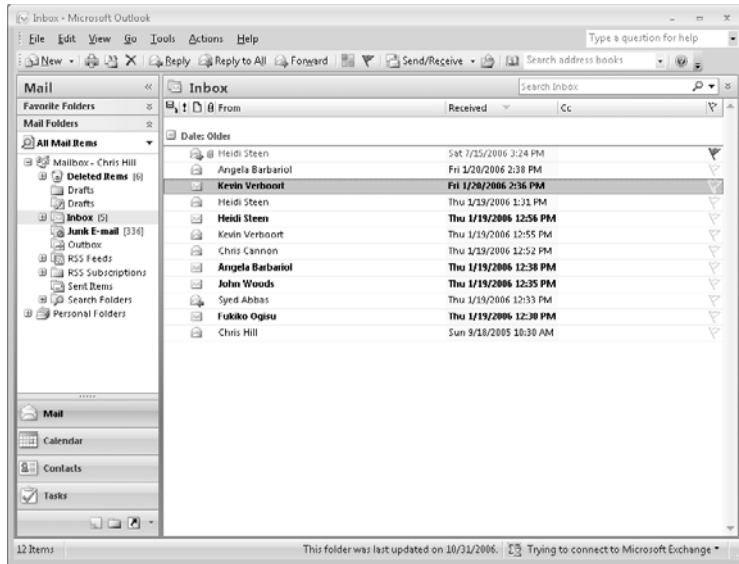


Figure 4-21. The Navigation Pane provides quick access to all Outlook 2007 data and other frequently used resources and folders.

For a detailed discussion of the Navigation Pane, including how to create your own groups and shortcuts, see “Customizing the Navigation Pane” in Chapter 26.

For information about obtaining updates and finding troubleshooting resources for both Outlook 2007 and the 2007 Microsoft Office system, see Article 10, “Updating and Troubleshooting Resources,” on the companion CD.

Note

You can create new shortcuts in any of the existing Shortcuts groups in the Navigation Pane, and you can also create your own groups.

Depending on your monitor’s resolution and the number of shortcuts in each group, you might not be able to see all the icons in a group. If that’s the case, you can use the scroll bar on the right edge of the Navigation Pane to scroll through the icons in the selected group.

Using Objects in the Navigation Pane

Most of the time, you’ll probably just click an icon in the Navigation Pane to open its associated folder. However, you can also right-click a view button and use the resulting shortcut menu to perform various tasks with the selected object. For example, you

might right-click the Calendar icon and then choose Open In New Window to open a second window showing the calendar's contents. To view a different folder, simply click the folder's button in the Navigation Pane. The content of the upper portion of the Navigation Pane changes according to the folder you select. For example, the Navigation Pane shows the Folder List if you click the Folder List button.

Controlling the Navigation Pane's Appearance

Outlook 2007 shows a selection of view buttons for standard folders in the Navigation Pane. If you don't use certain folders very often, however, you might prefer to remove them from the Navigation Pane to make room for other view buttons. For example, if you never use the Journal or Notes folder, you can remove those view buttons from the Navigation Pane and use the Folder List to access those folders when needed.

To change the view buttons displayed in the Navigation Pane, click Configure Buttons on the lower right in the Navigation Pane, and then choose Add Or Remove Buttons to open the shortcut menu shown in Figure 4-22. Click a folder in the list to either add it to or remove it from the Navigation Pane. Those folders that are selected in the list appear in the pane.

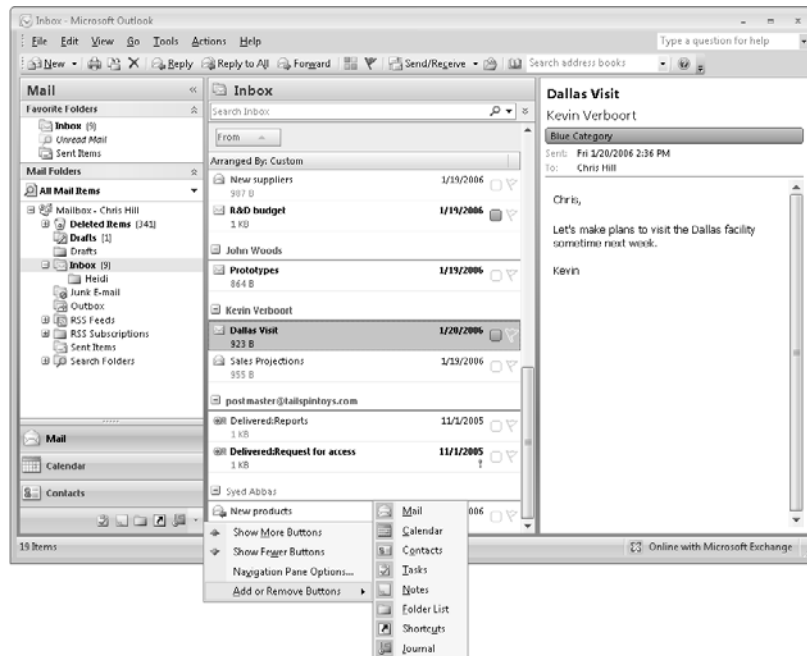


Figure 4-22. You can add standard view buttons to or remove them from the Navigation Pane.

If you need to add or remove more than one folder, click Configure Buttons, and then choose Navigation Pane Options to open the Navigation Pane Options dialog box. Select each folder you want included in the Navigation Pane, and then click OK.

Note

Use the Move Up and Move Down buttons in the Navigation Pane Options dialog box to control the order of buttons in the Navigation Pane.

If you seldom use the Navigation Pane, you can close it or minimize it to make room on the screen for the Folder List or other data. Simply choose View, Navigation Pane, and then choose Off or Minimize to alter the display.

Using the Outlook Toolbars

Outlook 2007 provides a Standard toolbar for the current folder that offers quick access to the tasks and functions you perform most frequently in that folder. Thus, the contents of the Standard toolbar change depending on the folder you have open. Certain items that appear on the toolbar for all folders work in specific ways in the context of the selected folder. For example, when you're working in the Inbox folder, clicking the New toolbar button starts a new e-mail message. With the Contacts folder open, clicking New opens a new contact form. You don't have to accept the default contextual action for these types of toolbar buttons, however; you can click the arrow next to a button to choose a specific command instead, as shown in Figure 4-23. To display the Standard toolbar in a folder, choose View, Toolbars, Standard. Use the same process to turn off the toolbar display.

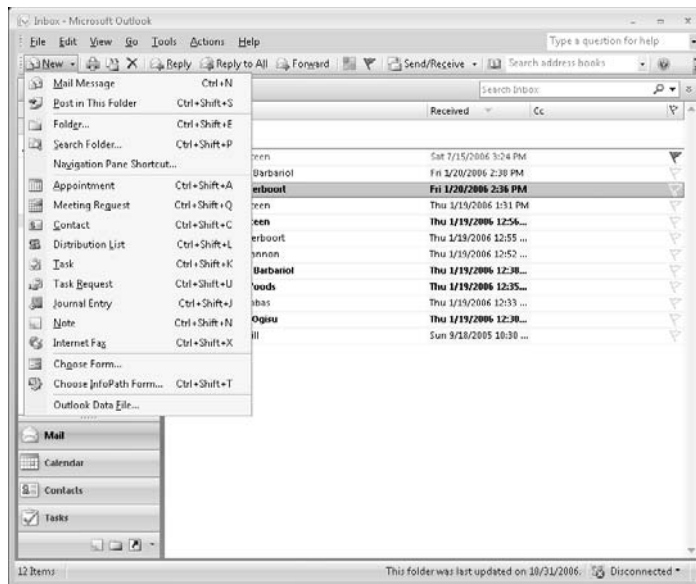


Figure 4-23. Click the arrow next to a toolbar button to view additional command options.

Note

Outlook 2007 and other Microsoft Office system applications refer to both menus and toolbars as *command bars*. However, Outlook 2007 still refers to the individual bars as *toolbars*. This book uses the two terms synonymously.

Note

If you're not sure what function a toolbar button performs, position the mouse pointer over the button to display a ScreenTip explaining the button's purpose.

If your display isn't wide enough to accommodate the entire toolbar, Outlook 2007 displays a double right arrow at the right end of the toolbar. Click this arrow to view the remaining toolbar buttons and to add buttons to or remove buttons from the toolbar.

For more information about customizing the Standard toolbar and other toolbars, see "Customizing Command Bars" in Chapter 26.

The Advanced toolbar, shown in Figure 4-24, provides additional commands and also works in the context of the current folder. In addition to navigation buttons, the Advanced toolbar contains buttons for opening and closing the Reading Pane and the Folder List, printing, setting up rules and alerts, selecting the current view, and more. Turn the Advanced toolbar on or off by choosing View, Toolbars, Advanced.

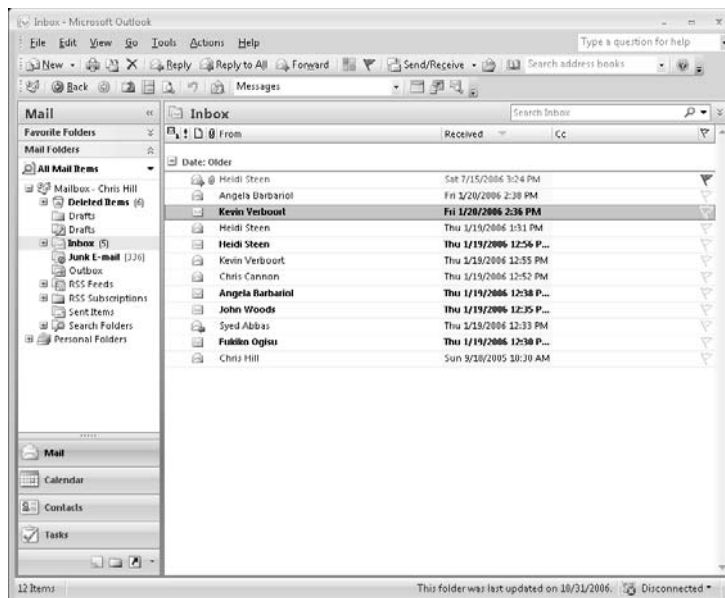


Figure 4-24. The Advanced toolbar lets you change views quickly.

The Web toolbar functions much as the navigation toolbar does in Microsoft Internet Explorer®. It includes Web navigation buttons, a URL address box, buttons for stopping and refreshing the current page, and so on. Choose View, Toolbars, Web to show or hide the Web toolbar.

Using the Ribbon

Unlike some of the other Microsoft Office system applications, the main Outlook 2007 window uses a familiar menu bar and toolbar combination to give you access to commands, options, and tools in Outlook 2007. These other applications, such as Microsoft Office Word 2007, use a new feature called the Ribbon to give you quick access to commonly used features. Outlook 2007 does make use of the Ribbon, but primarily in the individual item forms (message, contact, and so on), as shown in Figure 4-25.

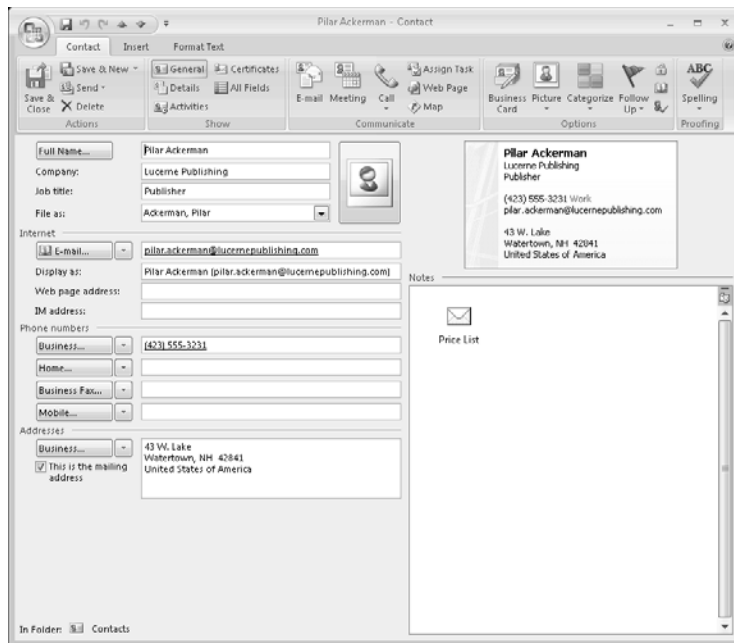


Figure 4-25. The Ribbon provides quick access to context-sensitive commands and features.

The Ribbon is something of a paradigm shift. Rather than provide a linear menu list of commands, the Ribbon divides features onto individual *tabs*, each of which comprises tools with related functions. For example, all of the tools that relate to inserting items into a new message are located together on the Insert tab of the new message form.

Each ribbon tab is divided into *groups*, and each group organizes the features for a specific function. On the Message tab of the new message form, for example, the Basic Text group organizes the tools you use to format text in the message.

Using Multiple Outlook Windows

Although Outlook 2007 opens in a single window, it supports the use of multiple windows, which can be extremely useful. For example, you might want to keep your Inbox open while you browse through your schedule. Or perhaps you want to copy items from one folder to another by dragging them. Whatever the case, it's easy to use multiple windows in Outlook 2007.

When you right-click a folder in the Navigation Pane, the shortcut menu for that folder contains the Open In New Window command. Choose this command to open the selected folder in a new window, keeping the existing folder open in the current window. You also can open a folder from the Folder List (discussed next) in a new window. Simply right-click a folder, and then choose Open In New Window to open that folder in a new window.

Using the Folder List

When you need to switch between folders, you'll probably use the Navigation Pane most of the time. But the Navigation Pane doesn't include shortcuts to all your folders by default, and adding those shortcuts can clutter the pane, especially if you have multiple data stores. Fortunately, Outlook 2007 provides another quick way to navigate your folders: the Folder List.

Click the Folder List button in the Navigation Pane to display the Folder List, as shown in Figure 4-26. In the list, click the folder you want to open. Outlook 2007 hides the Folder List again after you select the folder.

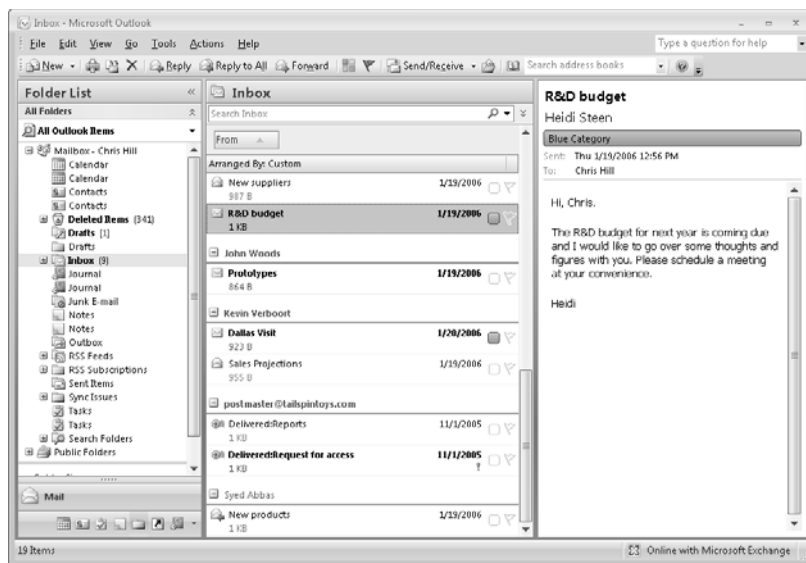


Figure 4-26. Use the Folder List to browse and select other folders.

Using the Status Bar

The status bar appears at the bottom of the Outlook 2007 window, as shown in Figure 4-27, and presents information about the current folder and selected items, such as the number of items in the folder. It can also include other status information, such as the progress of folder synchronization and connection status for Exchange Server. If you don't need the information in the status bar, you can turn it off to gain a little more space for the current folder's display. To turn the status bar on or off, choose View, Status Bar.

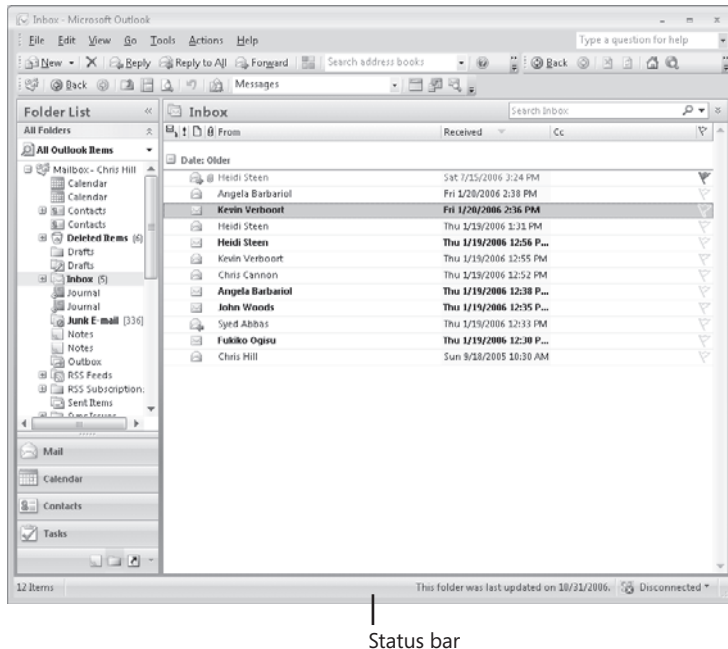


Figure 4-27. The status bar provides useful information, such as the number of items in the selected folder or current connection status to the server.

Using the Reading Pane

In earlier sections of this chapter, you learned about the Reading Pane, which allows you to preview Outlook 2007 items without opening them. For example, you can preview an e-mail message in the Reading Pane simply by clicking the message header. To turn the Reading Pane on or off, choose View, Reading Pane, and then choose Right, Bottom, or Off. You can also click the Reading Pane button on the Advanced toolbar to turn the pane on or off.

To some degree, the way the Reading Pane functions depends on how you configure it. For example, you can set up the Reading Pane to mark messages as read after they've been previewed for a specified length of time. To configure the Reading Pane, choose

Tools, Options, click the Other tab, and then click Reading Pane. Select options based on the following list:

- **Mark Items As Read When Viewed in the Reading Pane** Select this option to have messages marked as read when they've been previewed for the time specified by the following option.
- **Wait *n* Seconds Before Marking Item As Read** Specify the number of seconds a message must be displayed in the Reading Pane before it is marked as read.
- **Mark Item As Read When Selection Changes** Select this option to have the message in the Reading Pane marked as read when you select another message.
- **Single Key Reading Using Spacebar** Selecting this option allows you to use the **Spacebar** to move through your list of messages to preview them. Press **Shift+Spacebar** to move up the list. You also can use the **Up Arrow** and **Down Arrow** keys to move up and down the message list.

The Reading Pane in Outlook 2007 offers some additional functionality, which includes the following:

- In a message, you can double-click an address in the Reading Pane to view details for the address.
- The Reading Pane header displays the message's attachments. You can double-click an attachment to open it or right-click the attachment and choose other tasks on the shortcut menu (such as saving the attachment).
- The Reading Pane displays Accept and Decline buttons so that you can accept or decline a meeting request in the Reading Pane without opening the request.

Using AutoPreview

AutoPreview, which is available in the Inbox, Notes, and Tasks folders, allows you to preview Outlook 2007 items without opening the Reading Pane. For example, with AutoPreview turned on in the Inbox folder, the first three lines of each message appear under the message header. To turn AutoPreview on or off for the current folder, choose View, AutoPreview. The AutoPreview state (on or off) is saved on a folder-by-folder basis, so you can have AutoPreview turned on for the Inbox and turned off for Notes and Tasks.

Using the InfoBar

The InfoBar is the banner near the top of an open e-mail message, appointment, contact, or task. It tells you whether a message has been replied to or forwarded, along with the online status of a contact who is using instant messaging, and so on. The InfoBar in a message form, for example, displays the From, To, Cc, and other fields. In Outlook 2007, as in Outlook 2003, the InfoBar resides in the Reading Pane, as shown in Figure 4-28.

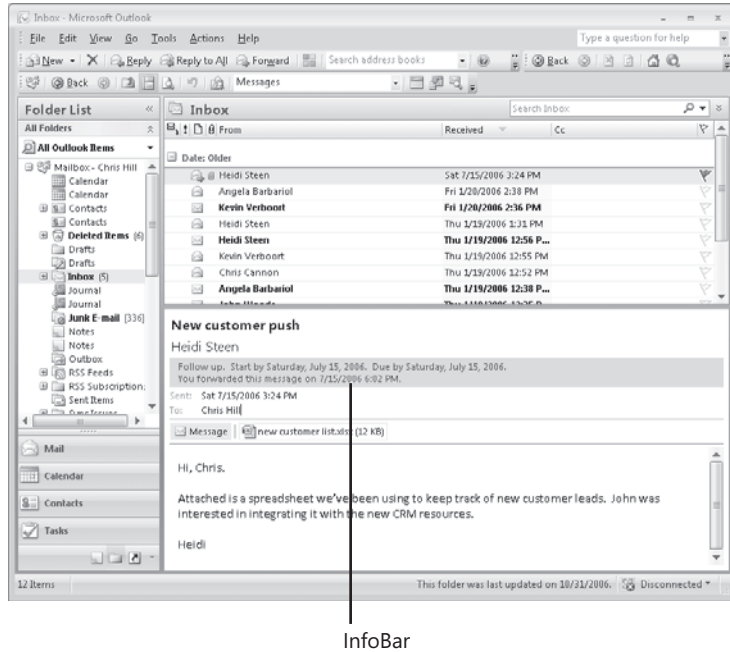


Figure 4-28. The InfoBar appears in the Reading Pane as well as in message and appointment forms. Here the InfoBar indicates that the message is flagged for follow-up.

Some of the fields in the InfoBar simply display information, but others lead to more details. For example, you can double-click a name in the InfoBar to view the associated address and other contact information, or you can double-click attachments to open them.

Configuring Outlook Options

Because Outlook 2007 is a complex application with a broad range of capabilities, you have many options for controlling the way it looks and functions. This portion of the chapter is designed to help you configure Outlook 2007 to perform the way you need it to.

Each of the following sections describes a tab in the Outlook 2007 Options dialog box, providing an overview of the features listed on that tab. Because many of the options in this dialog box are best understood in the context of the feature they control, you'll find more detail about individual options in chapters that focus on a particular Outlook 2007 feature (messaging or scheduling, for example); be sure to consult the cross-references to the applicable chapters for more information.

To open the Options dialog box described here, start Outlook 2007, and then choose Tools, Options.

Preferences Tab

The Preferences tab in the Options dialog box, shown in Figure 4-29, lets you configure general settings for all the Outlook 2007 primary functions, from e-mail to scheduling to contact management.

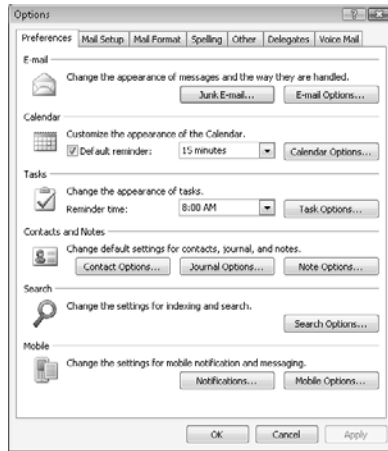


Figure 4-29. Use the Preferences tab in the Options dialog box to configure a broad range of general options.

Each of the option groups on the Preferences tab controls how a specific Outlook 2007 component works. The following list helps you locate specific settings:

- **E-Mail** You can specify how Outlook 2007 handles messages—for example, whether Outlook 2007 keeps a copy of sent items, saves unsent messages, or includes original message content in replies and forwards. You can also configure the Outlook 2007 junk e-mail filter settings. Chapter 8, “Sending and Receiving E-Mail,” provides extensive coverage of e-mail configuration options. Chapter 12, “Managing Junk Mail,” explains how to block junk e-mail, and Chapter 10, “Finding and Organizing Messages,” explains how to filter and sort messages in other ways.
- **Calendar** You can control the look of the Outlook 2007 calendar by, for example, defining the work week, changing the workday start and end times, changing the appearance of the Date Navigator, or setting background color. See Chapter 20, “Scheduling Appointments,” for a discussion of options for the Calendar folder.
- **Tasks** You can set the color for completed and overdue tasks, set up reminders for tasks with due dates, and configure other task-related settings. Chapter 22, “Managing Your Tasks,” covers task options in detail.
- **Contacts And Notes** You can control the way names are displayed in the Contacts folder, check for duplicate contact entries, configure journal options, and set other options for storing and managing your contact information. See Chapter 19, “Using Business Contact Manager with Outlook,” for a complete explanation.

You can also, for example, set the color, size, and font used for notes. Chapter 24, “Making Notes,” covers options for notes.

- **Search** Set options to control the way Outlook 2007 indexes and searches information and displays search results.
- **Mobile** Configure settings for Mobile Service options (text messaging).

Mail Setup Tab

On the Mail Setup tab, shown in Figure 4-30, you'll find additional settings that control e-mail accounts and Outlook 2007 messaging functions. For example, you can use the Mail Setup tab to create or modify e-mail accounts and configure how and when Outlook 2007 sends and receives messages.

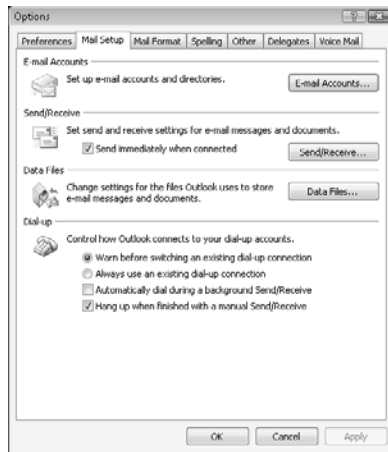


Figure 4-30. Use the Mail Setup tab to configure e-mail accounts and general messaging properties.

The following list describes the major areas on the Mail Setup tab and directs you to the chapter in which those settings are discussed:

- **E-Mail Accounts** These settings allow you to add, remove, or configure e-mail accounts. See Chapter 3, “Advanced Setup Tasks,” and Chapter 7, “Using Internet Mail Accounts,” to learn how to configure e-mail accounts.
- **Send/Receive** You can define groups of accounts, which Outlook 2007 then uses to determine when to process messages for specific accounts. You can configure settings separately for each group, providing a high degree of control over when and how Outlook 2007 processes messages. See Chapter 8, “Sending and Receiving E-Mail,” for information about send/receive groups and send/receive options.
- **Data Files** These settings let you add, remove, and configure information stores (data files) for Outlook 2007, including setting up offline access. See Chapter 2, “Outlook Overview and Startup,” to learn how to manage data files.

- **Dial-Up** Here you can configure a handful of settings that determine how Outlook 2007 handles dial-up connections for sending and receiving messages.

Mail Format Tab

Use the Mail Format tab, shown in Figure 4-31, to control the way your messages look and how you compose those messages. For example, you can use the Mail Format tab to specify either Word 2007 or Outlook 2007 as the default e-mail editor, to choose between plain-text and rich-text options, and to set international formatting options.



Figure 4-31. Use the Mail Format tab to select the default e-mail editor, mail format, and other properties.

The following list summarizes the option groups on the Mail Format tab. For details about the various settings in each group, consult Chapter 8, “Sending and Receiving E-Mail.”

- **Message Format** With these settings, you can choose among HTML, plain text, and rich text for outgoing messages; specify the default e-mail editor; specify the default e-mail viewer for rich-text messages; configure Internet and international options for messages; and set up other messaging features.
- **HTML Format** Set options that determine how Outlook 2007 handles HTML formatting and content for messages.
- **Stationery And Fonts** You can set default stationery (background) for messages, manage stationery, and specify font settings.
- **Signatures** These settings direct Outlook 2007 to add a text signature to all new messages and to replies and forwards. You can configure the two categories of messages separately. (Note that these signatures are different from digital signatures, which allow you to validate the authenticity of and encrypt messages.) Outlook 2007 also has the ability to assign specific signatures to each e-mail account.
- **Editor Options** Change options for the general Outlook 2007 interface (such as color scheme and ScreenTip style).

Spelling Tab

The Spelling tab, shown in Figure 4-32, lets you specify how spelling should be checked in Outlook 2007. The following sections summarize by function the settings available on this tab.

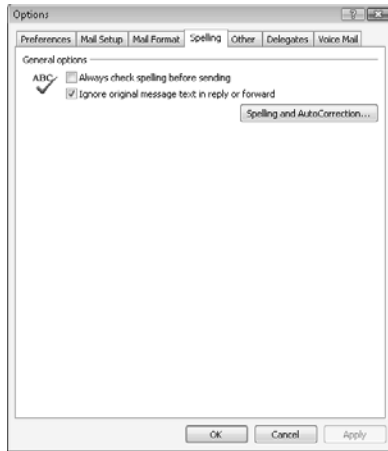


Figure 4-32. Use the Spelling tab to set options for checking spelling.

Checking Spelling

The General Options area of the Spelling tab allows you to set general guidelines for the spelling checker. The two options are:

- **Always Check Spelling Before Sending** Select this option to have Outlook 2007 automatically check spelling before you send a message. You also can check spelling manually.
- **Ignore Original Message Text In Reply Or Forward** Selecting this option specifies that Outlook 2007 will check spelling only in your message text, not in the original message text included in a reply or forward.

Click the Spelling And AutoCorrection button on the Spelling tab to display the following options, which affect all Microsoft Office system programs:

- **AutoCorrect Options** Click this button to specify how Outlook 2007 formats and corrects text as you type.
- **Ignore Words In UPPERCASE** You can instruct the spelling checker to skip words that appear in all uppercase letters. This option is useful, for example, if your document contains numerous acronyms and you don't want the spelling checker to waste time checking them.
- **Ignore Words That Contain Numbers** When you select this option, the spelling checker will not attempt to check the spelling of words that include numbers, such as *some342*.

- **Ignore Internet And File Addresses** When you select this option, the spelling checker will not check URLs or file names, such as *fileforchris.doc*.
- **Flag Repeated Words** Selecting this check box underlines repeated words, even when they are spelled correctly.
- **Enf@rce Accented Uppercase In French** This option alerts you to French words that contain uppercase letters that are missing an accent mark.
- **Suggest From Main Dictionary Only** When you select this option, words from only the main dictionary that is built into the spelling checker are suggested. Words from your custom dictionaries are not included in the list of suggested words when you check the spelling of a document.
- **Custom Dictionaries** Click this button to load customized dictionaries.
- **Check Spelling As You Type** With this option selected, Outlook 2007 checks spelling as you type messages or any other text in Outlook 2007 and offers suggestions.
- **Use Contextual Spelling** When you select this check box, Outlook 2007 also examines the context of a sentence to determine the use of correctly spelled but misused words—for example, *their* instead of *there*.
- **Mark Grammar Errors As You Type** When you choose this option, Outlook 2007 underlines grammatical errors with green wavy lines.
- **Check Grammar With Spelling** By selecting this check box, you instruct Outlook 2007 to check grammar at the same time as spelling.
- **Show Readability Statistics** If you select this check box, Outlook 2007 displays information about the reading level of the document after completion of spelling and grammar checks.

Using AutoCorrect

Outlook 2007, like other Microsoft Office system applications, supports AutoCorrect, a feature that allows Outlook 2007 to correct common spelling and typing errors and to replace characters with symbols. You also can use AutoCorrect as a shortcut, which means that you can type a small string of characters and have those characters replaced by a longer string. For example, if you frequently type the words **Windows Vista**, you might set up AutoCorrect to replace your shorthand typed phrase **vst** with *Windows Vista*. See the Inside Out sidebar in the “Setting Advanced Options” section later in this chapter for a handy use for smart tags and AutoCorrect entries.

Clicking AutoCorrect Options in the Editor Options dialog box displays the AutoCorrect dialog box, shown in Figure 4-33. You can use this dialog box to add new AutoCorrect entries or change existing entries. Click Exceptions to specify exceptions to AutoCorrect rules.

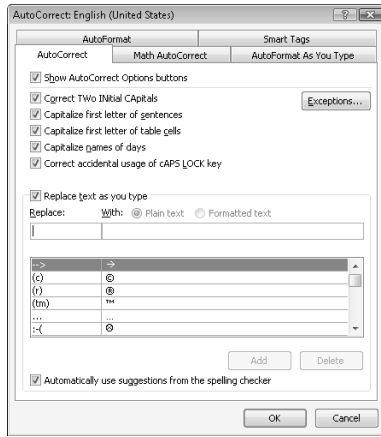


Figure 4-33. Use the AutoCorrect dialog box to add and modify AutoCorrect entries.

Editing a Custom Spelling Dictionary

When Outlook 2007 is checking spelling in a document and finds a word it considers misspelled, the program gives you the option of adding the word to a custom dictionary. This option lets you specify the correct spelling of words not found in the Outlook 2007 standard dictionary. For example, you might want to add your name to the custom dictionary if Outlook 2007 doesn't recognize its spelling. You can also add the correct spelling of special words or terms you use often to the custom dictionary.

INSIDE OUT

Use custom dictionaries throughout the Microsoft Office system

All Microsoft Office system applications use the same spelling features, including the custom dictionary. Words you add to the dictionary from other applications are available in Outlook 2007, and vice versa. This is also true for new dictionaries that you create: if you add another dictionary to Outlook 2007, that new dictionary is available in other Microsoft Office system applications.

Click the Custom Dictionaries button located in the Editor Options dialog box to open the custom dictionary. The Custom Dictionaries dialog box appears. To add new items to your dictionary, click Edit Word List. Type a new word and click Add, or select an

existing word and click Delete. The custom dictionary file is stored in the Application Data\Microsoft\UProof folder of your profile folder (which varies according to your operating system).

You can also add other dictionaries to Outlook 2007. To add a new dictionary, follow these steps:

1. Open the Custom Dictionaries dialog box, shown in Figure 4-34, as outlined earlier.

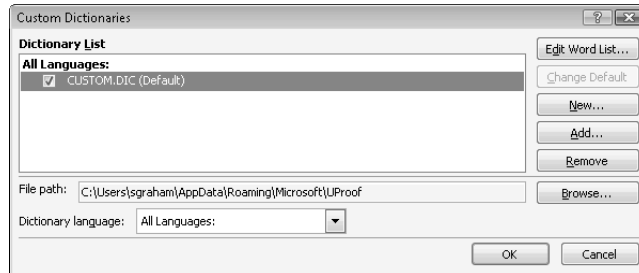


Figure 4-34. Add dictionaries using the Custom Dictionaries dialog box.

2. Click Add.
3. Browse to the desired dictionary file (*.dic), and then click Open. Click OK to close the dialog box.
4. Click OK to close the Editor Options dialog box.

Using International Dictionaries

The Dictionary Language setting in the Customized Dictionaries dialog box allows you to specify the language that Outlook 2007 uses when checking spelling. Simply select the appropriate language in the drop-down list, and then click OK.

Other Tab

The Other tab, shown in Figure 4-35, provides a selection of settings that apply to various aspects of Outlook 2007. The following sections explain how to configure specific features and behavior using this tab.



Figure 4-35. The Other tab gives you access to properties for several features.

Defining the Default Program for E-Mail, Contacts, and the Calendar

One setting on the Other tab lets you specify that Outlook 2007 is the default application for creating and viewing e-mail, contacts, and calendar items. Select the **Make Outlook The Default Program For E-Mail, Contacts, And Calendar** check box if you want Outlook 2007 to start when you open e-mail messages, contact entries, or calendar data from other sources.

Processing Deleted Items

You can use the Other tab to specify how Outlook 2007 processes deleted items. The first of the following two options is located on the Other tab; click **Advanced Options** to access the second.

- **Empty The Deleted Items Folder Upon Exiting** Select this check box to have Outlook 2007 automatically delete all items from the Deleted Items folder when you exit the program. This action permanently deletes the items.
- **Warn Before Permanently Deleting Items** Click **Advanced Options** and select this option if you want Outlook 2007 to warn you before it permanently deletes items from the Deleted Items folder.

Setting Up AutoArchive

The options accessed by clicking **AutoArchive** on the Other tab let you control how Outlook 2007 archives data, processes deleted and expired items, and implements other backup properties, such as the retention policy. See Chapter 30, “Managing Outlook Folders and Data,” for more information about backup and archival options and procedures for Outlook 2007.

Customizing Outlook Panes

Clicking Reading Pane on the Other tab provides access to options that specify the way the Reading Pane functions. These options are explained in detail earlier in this chapter; see “Using the Reading Pane.”

Click the Navigation Pane button to specify which items appear in the Navigation Pane and their displayed order. For example, if you use the Contacts folder more than the Calendar folder, you might want to move the Contacts folder icon higher in the Navigation Pane.

Click the To-Do Bar button on the Other tab to set options for the To-Do Bar that control which items appear in the To-Do Bar (Date Navigator, appointments, and Task List).

Setting Up Person Names

Use the Person Names area on the Other tab to configure MSN® Messenger and use instant messaging (sending or receiving pop-up messages in communication with other users).

Setting Advanced Options

The Other tab of the Options dialog box lets you access a set of special advanced options for configuring Outlook 2007. Click Advanced Options on the Other tab to display the Advanced Options dialog box, shown in Figure 4-36. You can use the options in this dialog box to configure various aspects of Outlook 2007 behavior and appearance, as described in the following list:

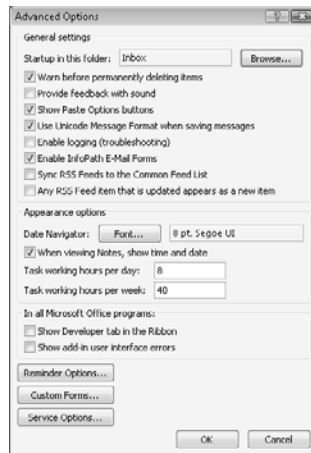


Figure 4-36. The Advanced Options dialog box controls several advanced features.

- Startup In This Folder** This option lets you specify which folder Outlook 2007 opens by default when you start the program. Click Browse to select the folder.

- **Warn Before Permanently Deleting Items** Enable this option to have Outlook 2007 display a warning before it permanently deletes items.
- **Provide Feedback With Sound** You can direct Outlook 2007 to play a sound when you perform actions such as opening a file or deleting a message.
- **Show Paste Options Buttons** When this option is selected, Outlook 2007 displays a smart tag when you paste data from the Clipboard, allowing you to change the paste format and other paste options. This method of changing these options is faster than using the Edit menu.

INSIDE OUT

Use smart tags to get quick access to features

Smart tags are controls that provide quick access to commands and features without forcing you to browse the application's menu. When you paste data from the Clipboard, for example, Microsoft Office system applications display a smart tag beside the pasted data. You can select other paste formats and fine-tune the data without repasting or using the Edit menu. Smart tags also come in handy with AutoCorrect entries. If you type some text referenced by an AutoCorrect entry, Microsoft Office system applications change the text automatically but add a smart tag beside the modified text so that you can select other changes or undo the correction. Other types of smart tags provide similar quick access to document data and editing.

Use Unicode Message Format When Saving Messages Use the Unicode character set when saving messages to disk.

Enable Logging (Troubleshooting) This option allows Outlook 2007 to log e-mail event status to the OPMLog.log file, which is located in the Temp folder of your profile folder.

Enable InfoPath E-Mail Forms This option allows the controls of a Microsoft Office InfoPath® form to function when received as an e-mail message.

Sync RSS Feeds To The Common Feed List Enable this option to synchronize Really Simple Syndication (RSS) feeds to a common list on the computer running Exchange Server.

Any RSS Feed Item That Is Updated Appears As A New Item Select this option to have updated RSS items appear as new items in your Inbox or designated folder.

Date Navigator Click Font to select the font used by the Date Navigator. Changing the font changes not only the appearance of the Date Navigator but also the number of months displayed. Make the font smaller to show more months or larger to show fewer months.

When Viewing Notes, Show Time And Date You can have Outlook 2007 display the time and date a note was created or last modified at the bottom of the note.

Task Working Hours Per Day and Task Working Hours Per Week These two options define your work week for managing tasks. The default settings are 8 hours and 40 hours, respectively.

Show Developer Tab In The Ribbon Include in the Ribbon the Developer tab, which gives you quick access to the Microsoft Visual Basic® Editor, macro security settings, and other developer-related features.

Show Add-In User Interface Errors Display errors related to Microsoft Office system program add-ins.

Note

The Advanced Options dialog box includes three buttons at the bottom that let you configure a variety of options. Some of these buttons and their options are covered in the following sections. See Chapter 28, "Designing and Using Forms," for information about configuring custom forms.

Configuring Reminder Options

The Reminder Options button in the Advanced Options dialog box opens a simple Reminder Options dialog box that offers two options for configuring Outlook 2007 reminders:

- **Display The Reminder** Choose this option to have Outlook 2007 display reminders in the Reminders window when they come due.
- **Play Reminder Sound** Choose this option to have Outlook 2007 play a sound when a reminder comes due, and choose the sound file you want Outlook 2007 to use.

Custom Forms

Clicking Custom Forms in the Advanced Options dialog box displays the Custom Forms Options dialog box, where you can configure two options:

- **Temporary Storage For Forms** Set the maximum space (in KB) on the hard disk for storage of forms.
- **Allow Forms That Bypass Outlook** Permit forms to run that bypass the Outlook 2007 security model.

Setting Service Options

Clicking Service Options in the Advanced Options dialog box displays the Service Options dialog box, shown in Figure 4-37. This dialog box provides access to two configuration pages.

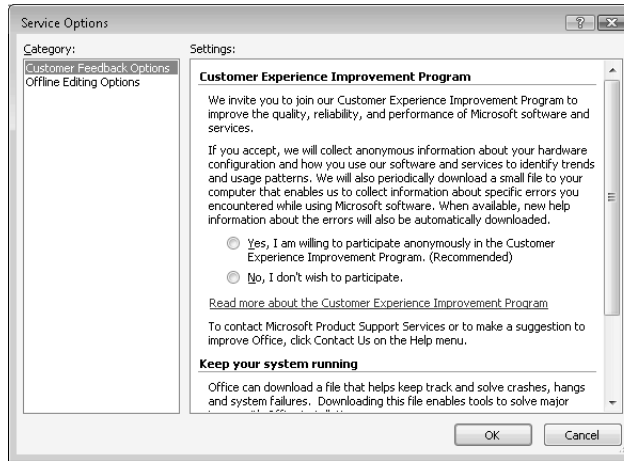


Figure 4-37. Use the Service Options dialog box to configure customer feedback and offline editing options.

- Customer Feedback Options** The Customer Feedback Options area allows you to enable or disable participation in Microsoft's Customer Experience Improvement Program. When this option is enabled, Microsoft Office system applications submit information about your system and the way you use your applications to Microsoft over the Web, along with information about errors you encounter. Participation is disabled by default. Participating can provide Microsoft with useful information that could ultimately lead to better software, but you can leave this option disabled if you don't want your usage information shared or if providing this information isn't practical because you use a dial-up Internet connection. You can also disable this function in networks with widespread Microsoft Office system deployment to reduce network traffic and reduce data outflow.
- Offline Editing** The Offline Editing area has two simple configuration options. The first, Server Drafts Location, allows you to set the file location of the server drafts. The second, Offline Editing Options For Document Management Server Files, specifies where such files would be stored for an application, such as Microsoft Office SharePoint® 2007.

Delegates Tab

The Delegates tab in the Options dialog box lets you specify other people who have delegate access to your folders and can send items on your behalf (meeting requests, for example). See Chapter 35, "Delegating Responsibilities to an Assistant," for detailed information about using delegation and specifying delegates.

Voice Mail Tab

The Voice Mail tab appears in the Options dialog box if you are using an Exchange Server account for which Unified Messaging is enabled. The options on the Voice Mail

tab let you specify a variety of options that control how you access your mailbox from a phone and how voice mail is handled.

The options on the Voice Mail tab include:

- **Telephone Access Numbers** Specifies the number you use to access voice-enabled features of your Exchange Server mailbox.
- **Reset PIN** Click to reset the personal identification number (PIN) for your voice-enabled mailbox.
- **Choose The Folder To Read When Accessing E-Mail Messages From A Phone** Click Change Folder to choose the mail folder from which you want to listen to mail messages when calling in to the server.
- **Play On Phone Number** Specifies the phone number you use to listen to voice messages as an alternative to playing those messages in Outlook 2007.
- **Voice Mail Greeting** Choose this option to have Exchange Server use your regular greeting for callers.
- **Out Of Office Voice Mail Greeting** Choose this option to have Exchange Server use your Out Of Office greeting for callers.
- **Call** Click to call the Play On Phone Number when you need to play or record a greeting.
- **Send An E-Mail Message To My Inbox When I Miss A Phone Call** Use this option to receive an alert in your Inbox when you miss a call.

Using Outlook on the Web

Outlook 2007 includes several features that integrate its functionality with the Internet. This section explores these features, including a look at browsing the Web with Outlook 2007 and connecting to Exchange Server through the Hypertext Transfer Protocol (HTTP).

Browsing the Web with Outlook

The integration of Outlook 2007 with Internet Explorer allows you to browse the Internet without leaving Outlook 2007. This feature is handy when you need to retrieve a file, view online documents, or otherwise access data on the Web but don't want to open Internet Explorer. The Outlook 2007 ability to browse the Web allows you to continue working in a single interface and avoid switching between open applications.

The Web toolbar includes an Address box in which you can enter the URL for a Web-related resource, such as a File Transfer Protocol (FTP) site or a Web site, as shown in Figure 4-38. To view a site in Outlook 2007, type the URL in the Address box, and then press **Enter**. Alternatively, you can click the arrow next to the Address box to select a URL that you've visited previously. (Please note that using the Outlook 2007 interface to view a Web site will change the Web site's appearance and content.) The Stop and Refresh buttons on the toolbar perform the same function they do in Internet Explorer.

When you want to go back to working with your Outlook 2007 folders, simply select the folder you need from the Navigation Pane or the Folder List.



Figure 4-38. You can use Outlook 2007 to browse Web sites and other Web resources.

Connecting to Exchange Server with HTTP

Outlook 2007 includes support for connecting to Exchange Server with HTTP, the standard protocol used to access Web sites. HTTP access to Exchange Server in Outlook 2007 is not the same as using Outlook Web Access (OWA) or Outlook Anywhere (the Exchange Server 2007 name for OWA) to view your mailbox from a Web browser. Instead, Outlook 2007 itself can use HTTP to send and receive messages and interact with your Exchange Server mailbox in other ways.

Using HTTP for access to a computer running Exchange Server provides greater flexibility for remote access with Outlook 2007 and simplifies network security configuration for Exchange Server and network administrators. Remote access and the use of HTTP in Outlook 2007 are covered in Chapter 43, “Working Offline and Remotely.”

Accessing Your Mail Through a Browser

Outlook 2007 serves as a great client application for e-mail, but on occasion, you might want to use a simpler method of accessing your messages. For example, you might be out of town unexpectedly, without your computer, and realize that you need to read an important message. Or perhaps you'd like to check your office e-mail from home but don't have your Outlook 2007 configuration installed on your home computer.

Whatever the case, Exchange Server supports access to your Exchange Server mailbox through OWA.

Using OWA or Outlook Anywhere to access your Exchange Server mailbox doesn't require extensive configuration. You simply point your Web browser to the URL on the server that provides access to your mailbox. The URL varies according to how OWA is configured on the server, in addition to a few other considerations.

For a detailed look at using OWA or Outlook Anywhere to access your Exchange Server mailbox, see Chapter 44, "Accessing Your Outlook Items Through a Web Browser."

Configuring Windows Settings for Outlook

Although most of the settings you'll need to configure for Outlook 2007 are configured through the program itself, some settings in the underlying operating system have an impact on the way Outlook 2007 functions and displays your data. This section offers an overview of the settings you might consider reviewing or modifying for use with Outlook 2007.

Display Settings

Because Outlook 2007 packs a lot of information into a relatively small amount of space, your display resolution has some impact on the application's usefulness. You should configure your system for a screen resolution of at least a 1024 × 768 desktop, preferably larger, depending on the size of your monitor. This is particularly important if you're using multiple Outlook 2007 windows at one time.

To configure properties for the display, you use the Display icon in Microsoft Windows® Control Panel. You can also right-click the desktop and choose Properties to open the Display dialog box.

Note

A handful of freeware and shareware applications are available that let you create multiple virtual desktops to expand your available desktop space. A search of your favorite shareware site should turn up at least one or two such utilities. An application we particularly like for managing multiple monitors is UltraMon, from www.ultramon.com.

Regional Settings

The regional settings on your computer determine how the operating system displays time, dates, currency, and other localized data. Because Outlook 2007 uses these types of data extensively, configuring your regional settings properly is an important step in

setting up for Outlook 2007. This step is especially important for your calendar if you use multiple time zones. To configure regional settings, use the Regional Settings or Regional Options icon in Control Panel.

Time Synchronization

Much of your Outlook 2007 data is time-sensitive. For example, e-mail messages have sent and received times, and meetings are scheduled for specific periods. If your system's clock isn't accurate, some of that data won't be accurate. You should make sure that your clock is set correctly and that the system maintains the accurate time. You can set the time either by using the Date/Time icon in Control Panel or by double-clicking the clock in the system tray.

You also can use synchronization tools to synchronize your computer with a time server. Such tools are available as third-party utilities for use with all Microsoft Windows platforms, and a search of your favorite download site should turn up a few. In addition, Windows XP clients can take advantage of the Windows Time Service (W32Time), which allows client computers to synchronize their time with domain controllers on their network. If you're not familiar with W32Time, check with your system administrator for help in setting it up.

Using Add-Ins

Outlook 2007 provides tremendous functionality right out of the box and could well serve all your needs. However, if you need additional features not provided directly by Outlook 2007, *add-ins* can help to extend Outlook 2007 functionality. Outlook 2007 includes a handful of such add-ins, and third-party developers can produce others.

Outlook 2007 supports two types of add-ins: application-specific (standard) add-ins and Component Object Model (COM) add-ins. Standard add-ins are the type supported by earlier versions of Microsoft Outlook, which allow a developer to add features to one Microsoft Office system application. Standard add-ins are not portable between Microsoft Office system applications. These add-ins are integrated into Outlook 2007 through dynamic-link libraries (DLLs).

COM add-ins use the Microsoft COM to allow shared functionality between the various Microsoft Office system applications. COM add-ins were added as new features in Microsoft Office 2000 and are therefore also available in Microsoft Office 2003 and Outlook 2007. These add-ins are integrated into Microsoft Office system applications, including Outlook 2007, through either DLLs or ActiveX® controls.

You install add-ins when you install the Microsoft Office system; the list of available add-ins depends on which options you select during installation. To view the installed add-ins, choose Tools, Trust Center, and then click the Add-Ins link. Click the drop-down list next to Manage. Choose Exchange Client Extensions to view, install, and enable or disable standard Outlook 2007 add-ins, and click COM Add-Ins to view, install, and enable or disable COM add-ins and control their loading behavior. With your choice selected, click Go to manage the settings.

For more information about different add-ins available for use with Outlook 2007, see “Outlook Add-Ins” on the companion CD.

Using Outlook Effectively

Other chapters in this book include sections that offer best-practice advice on using specific features, such as the calendar. This section of this chapter offers some best-practice advice overall on using Outlook 2007 effectively:

- **Integrate and take advantage of Outlook 2007.** If you have been using Outlook Express, Windows Mail, or another e-mail client instead of Outlook 2007, make the switch to Outlook 2007 for e-mail. Outlook 2007 integrates many of the contact-management and tracking features with e-mail, making it an extremely useful productivity tool. In addition, Outlook 2007 offers some exceptional features for gathering and organizing e-mail (such as search folders), making it an excellent choice for handling all or your e-mail needs.
- **Get organized.** Make extensive use of folders and categories to organize your messages, contacts, appointments, and other Outlook 2007 data. The better you organize your data, the easier it will be to find and work with it, making you that much more efficient. Don't just throw stuff into your Outlook 2007 folders—take the time to manage your data effectively. In particular, make use of categories and search folders to help you manage your e-mail, and use automatic formatting and color categories to organize your calendar.
- **Keep your Inbox cleared out.** Near the end of your workday, allocate a certain amount of time to work through your Inbox and respond to each message. Reply to those you can and move them into appropriate folders for archiving. Those you can't respond to because they require follow-up should be flagged for follow-up. The fewer messages you have in your Inbox at the end of the day, the greater your sense of accomplishment when you leave the office.
- **Take advantage of the Navigation Pane, Reading Pane, and To-Do Bar.** These Outlook 2007 features can help you quickly navigate Outlook 2007 to find the information you need. In Outlook 2007, the capability to minimize the Navigation Pane and To-Do Bar will give you a lot more window space to work with in your Outlook 2007 folders.

For more best-practice advice on using specific Outlook 2007 features, look for the appropriate sections at the end of selected chapters throughout this book.