Outlook Tips & Tricks

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Customize the Navigation Pane

To customize which buttons appear on the Navigation Bar and in what order, select *Navigation Pane Options* from the **Configure buttons** menu, as shown below.
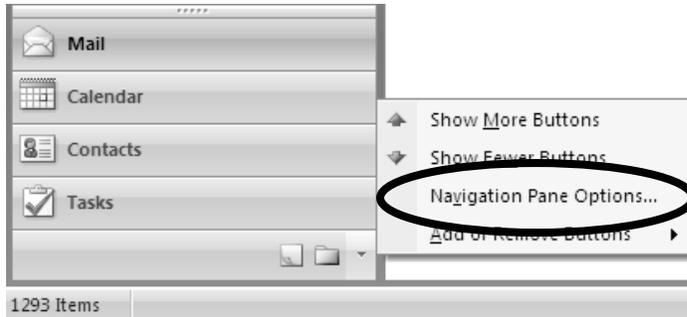
In the Navigation Pane Options dialog box, uncheck each button you do not wish to display in the Navigation Pane. To rearrange the buttons, select the button to be moved and click the **Move Up** or **Move Down** button, as necessary.
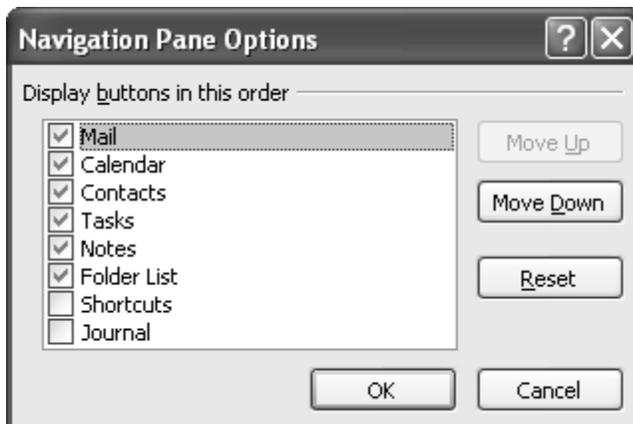
Customize the Reading Pane

The Reading Pane in Outlook 2007 lets you read the content of a message without opening the message in a separate window. In addition to reading the message itself, you can use the Reading Pane to open attachments, follow a hyperlink, use voting buttons, view the follow-up information, and respond to meeting requests.

To turn on the Reading Pane:

1.   From the **View** menu, point to **Reading Pane** and then click **Right** or **Bottom** to determine the location of the Reading Pane.
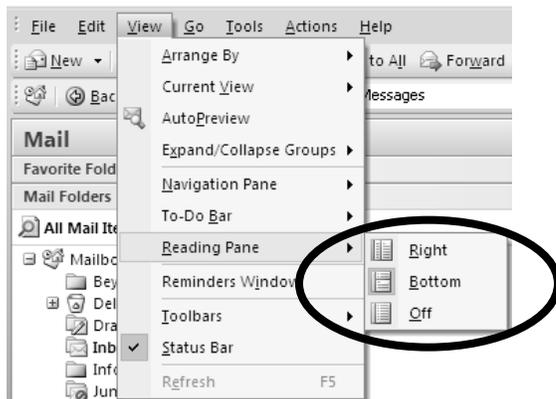
Outlook 2007 provides some options for managing the Reading Pane, such as determining whether messages viewed in the Reading Pane are marked as read or unread items.

To set Reading Pane options:

1.   From the **Tools** menu, click **Options**.

2.   On the *Other* tab, click the **Reading Pane** button.
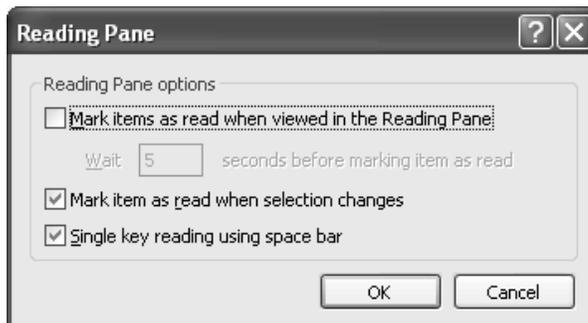
4.   Select the desired options and click the **OK** button.

NOTE: The *Single key reading using space bar* option lets you use the [Spacebar] to move through the messages in the current folder one by one and, when the content of the current message is too long to fully display in the Reading Pane, pages you through that message before moving to the next message.

Use and Customize the To-Do Bar

One of the best new features in Outlook 2007 is the To-Do Bar, where you have quick access to your calendar as well as your task list. By default, the To-Do Bar shows a 1-month date navigator, your next three calendar items and all of your tasks in your To-Do List.

To display the To-Do Bar:

1.   From the **View** menu, point to **To-Do** Bar and click **Normal**.

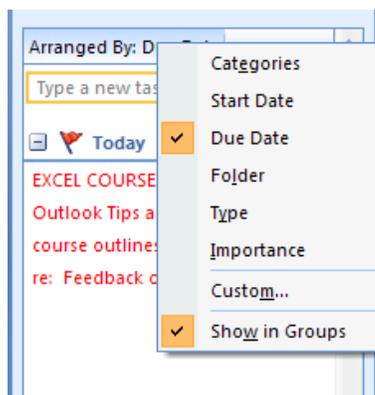To modify what displays in the To-Do Bar:

1.   From the **View** menu, point to **To-Do** Bar and click **Options**.

2.   Change the options as desired and click **OK**.

To display only tasks in the Task List that are due today or overdue:

1.   In the To-Do Bar, right-click the Arranged By column heading in the Task List.

2.   Click **Custom**.

3.   Click the **Filter** button.

4.   Click the *Advanced* tab.

5.   Click the **Field** button and select Date/Time fields and Due Date.
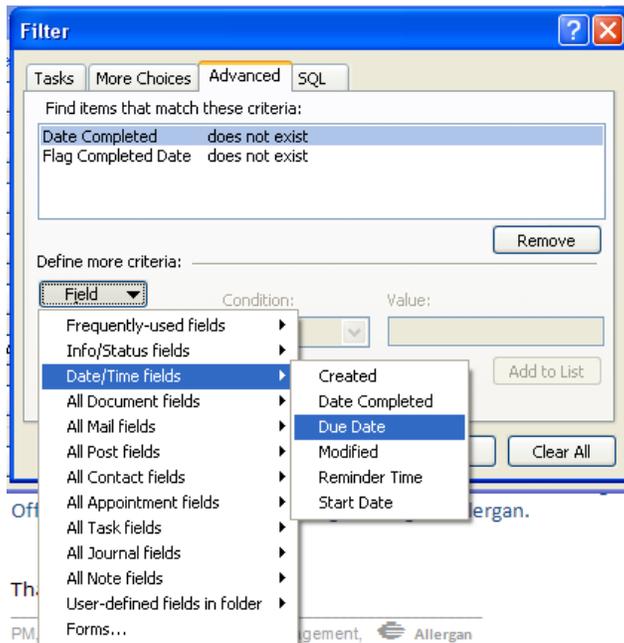
6.   In the *Condition* field, choose **on or before** and in the *Value* field, type **today**.
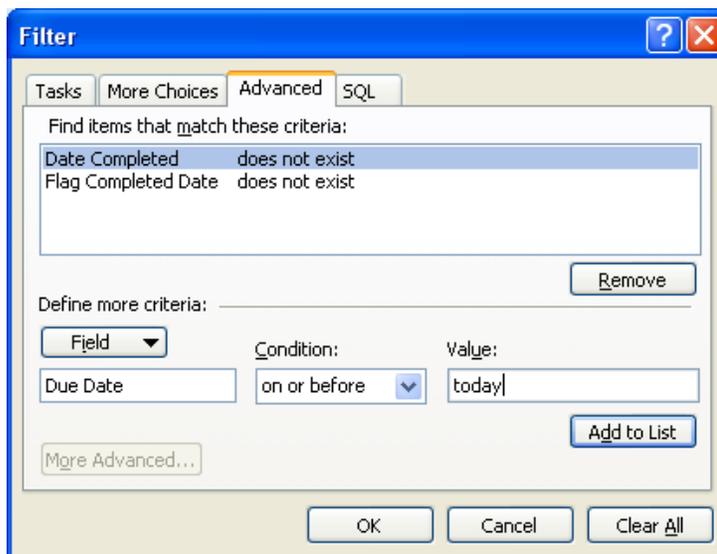
7.   Click **Add to List**.

8.   Click **OK** twice to return to Outlook.

Use Quick Flags

Flags can be added to mail items, meeting requests, contacts and posted items to remind you to follow up on an issue or to indicate a request for someone else. Flagging a message adds that message to the Task List. You can also use flags to set a reminder for the message or contact. On the specified date and time, the reminder will pop up in an Outlook dialog box, just like the one you see with appointment reminders.

Outlook 2007 provides six different colored flags that you can add to an e-mail message. Each flag represents a different due date, which is then associated with the due date of the task that is added to the Task List. In addition, you can sort or group your Outlook items by flag color.

Mail items to which you add a message flag will automatically display in the **For Follow Up** Search Folder. E-mail items sent to you from another user with a message flag will not appear in this Search Folder, unless you add a flag to the item. Search folders will be discussed in detail in the next section of this document.

You can quickly add a flag, or mark the flag complete, by clicking in that column to the right of the message in question. When you click in the Quick Flag column, the default flag color icon ⚑ appears. If you click the Quick Flag column again, that message becomes flagged as complete and a ✓ appears in the column.

To add a different colored flag to a message, clear the flag, add a reminder or change the default color of the flag, right-click in the Quick Flag column and select the desired option from the shortcut menu shown below.

The Quick Flag column
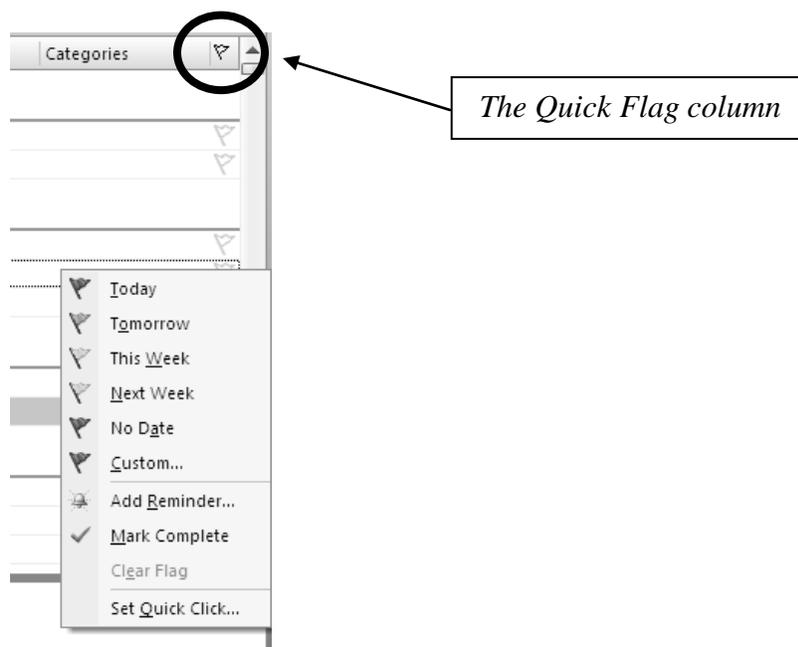
Create Search Folders

Outlook users often organize their messages logically into folders to make those messages easier to locate in the future. For example, you may have a folder for each of the projects on which you are working. When you receive an e-mail message regarding a project, you move that message into the corresponding folder. Let's say that you are trying to tie up all your loose ends and you want to see all messages that you have flagged for follow up. Each of your folders may have one or more messages flagged for follow up, so you may find yourself switching to each folder one at a time, sorting by the Flag Status column and addressing each message with a flag. Search Folders can make this process much easier.

Search Folders find the messages you're looking for, regardless of the folder in which they reside, based on their content or some other significant attribute such as who they're from or whether they are flagged for follow up. A Search Folder combines the power of searching with the convenience of a folder.

Outlook provides you with four predefined Search Folders. The **Categorized Mail** Search Folder includes items that have been assigned a color category. The **Unread Mail** Search Folder displays all unread messages, regardless of the folder in which they reside. The **Large Mail** Search Folder displays all e-mail items that are larger than 100 kilobytes (KB). The **For Follow Up** Search Folder displays all mail items flagged for follow up.

You can also create additional Search Folders. Once you create a Search Folder, new messages will automatically appear in it if they meet the criteria of the folder. In other words, once you've created a Search Folder, the folder will always keep itself up to date.

To create a new Search Folder:

1.   Click on the **Mail** button at the bottom of the Navigation Bar, if necessary.

2.   In the list of mail folders in the Navigation Pane, right-click on **Search Folders** and click on **New Search Folder** in the shortcut menu.
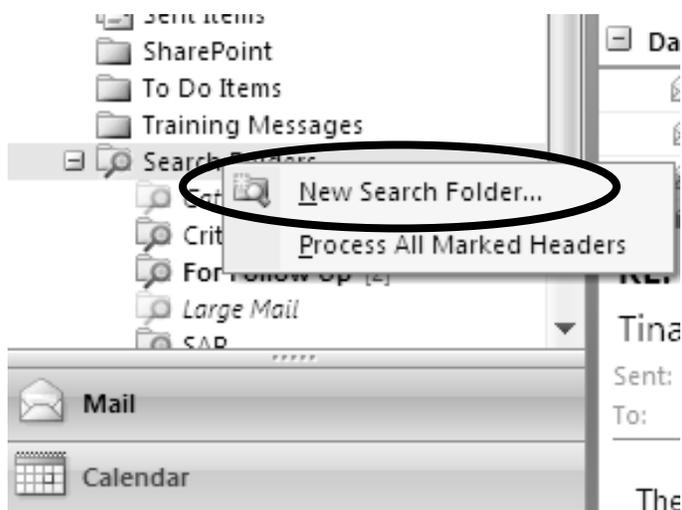
3.   In the *Select a Search Folder* list, select one of the predefined options.

4.   If you selected a predefined Search Folder that requires additional criterion, such as the **Mail from and to specific people** Search Folder shown below, or if you chose **Create a custom Search Folder**, click on the **Choose** button and specify the appropriate criteria. Once you have specified the criteria, click **OK** to return to the *New Search Folder* dialog box.

5.   In the *Search mail in* box, select the folders to be included in the search.

6.   Click on **OK**.

7.   Rename the new Search Folder, if necessary, by right-clicking it in the Navigation Pane and selecting **Rename…**

NOTE: You can also create a Search Folder by selecting **File > New > Search Folder** from the Menu Bar.

NOTE: When you delete a Search Folder, the e-mail messages shown in the Search Folder are not deleted from their original locations, because those items are only *viewed* in a Search Folder, they don't actually reside there. However, if you open or select one or more e-mail messages shown in a Search Folder and then delete them, the messages will be deleted from the Outlook folders where they were stored.

Use and Customize E-mail Alerts

A new e-mail alert is a notification that appears on your desktop when you receive a mail message, meeting request or task request. By default, Desktop Alerts appear in the lower right corner of your desktop. When the alert appears on your desktop, you can click the down-arrow next to the close button and use the resulting menu options, shown below, to manage the message without displaying your Inbox.
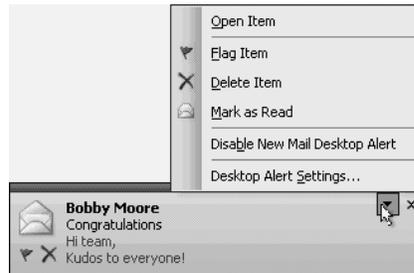

You can keep a Desktop Alert visible by positioning your cursor on the alert before it fades from view. You can also change the default length of time they remain visible. You can adjust the transparency of the alerts to make them more noticeable or to keep them from blocking your view of other items. Finally, you can change where your Desktop Alerts appear by dragging one of them to a more preferable location on your desktop.

If you receive a large number of items within a particular period of time, Outlook displays a single Desktop Alert to indicate that you received several new items, thus preventing your desktop from suddenly becoming overwhelmed with alerts.

To customize the Desktop Alerts:

1.   From the **Tools** menu, click **Options**.

2.   Click the **E-mail Options** button.

3.   Click the **Advanced E-mail Options** button.

4.   Click the **Desktop Alert Settings** button.
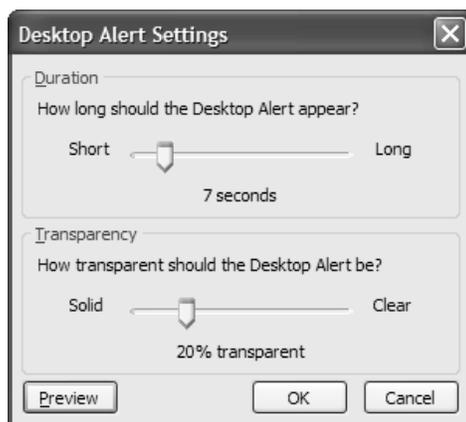
5. To change the length of time the alert remains visible, drag the *How long should the Desktop Alert appear* control button to the left or right. To have the alert be more or less transparent, drag the *How transparent should the Desktop Alert be?* control button to the left or right.

6. To change the location of the alerts on your desktop, click the **Preview** button and drag the top edge of the alert to a new location.

7. Click **OK** four times to return to Outlook.
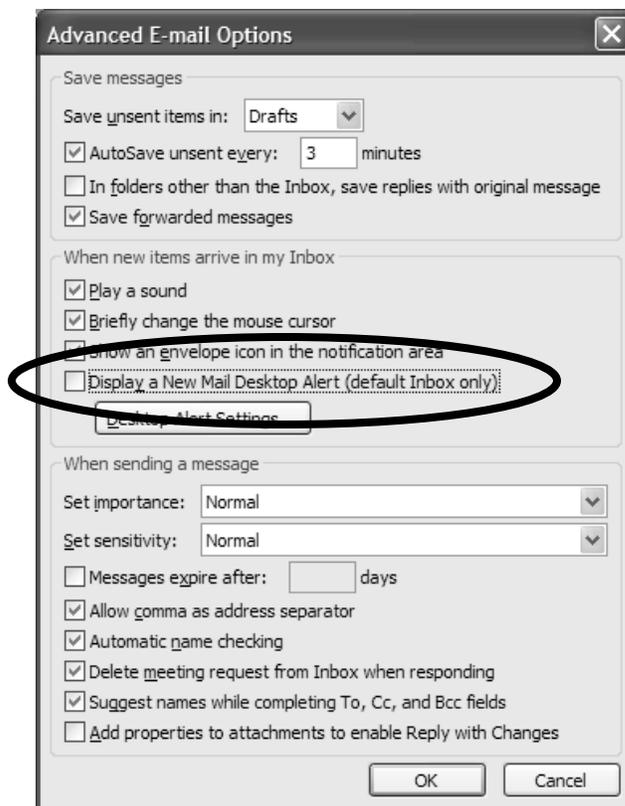
To turn off Desktop Alerts:

1. From the **Tools** menu, click **Options**.

2. Click the **E-mail Options** button.

3. Click the **Advanced E-mail Options** button.

4. Click the *Display a New Mail Desktop Alert (default Inbox only)* check box to clear the checkmark.


5. Click **OK** three times to return to Outlook.

Use the Create Rule Button

The *Create Rule* button ⬜ on the Standard toolbar lets you quickly create a rule that affects all messages having one or more of the attributes of the currently selected message.

To create a rule using the Create Rule button:

1.   Select a message having one or more of the attributes of messages you wish to have processed by the rule.

2.   Click the **Create Rule** button ⬜ on the Standard toolbar. The Create Rule dialog box will appear, as shown below.
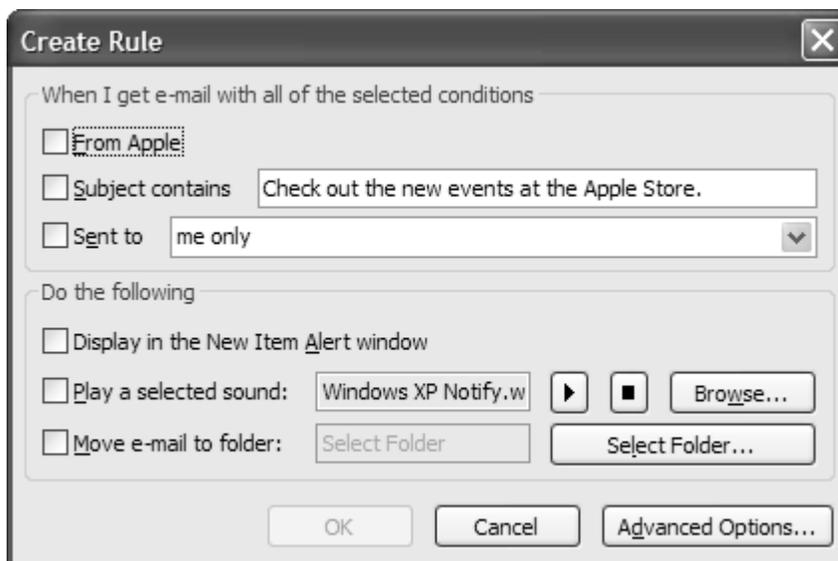
3.   In the *When I get e-mail with all of the selected conditions* section, select the attributes that describe the messages to be processed with this rule.

4.   In the *Do the following* section, select the actions to be taken when messages arrive with the selected attributes.

5.   If you need to add additional conditions or actions to be taken, click on the **Advanced Options** button and use the Rules Wizard to add the appropriate conditions and actions.

Mailbox Limits/Cleaning Up your Mailbox

Regular mailbox maintenance includes removing items from the folders in your mailbox or moving items to personal folders. The Mailbox Cleanup is one tool that helps you manage the size of your mailbox. You can view the total size of your mailbox and of individual folders within it. You can easily locate items that are larger than a certain size or older than a certain date. You can also empty your Deleted Items folder from within Mailbox Cleanup.

To use the Mailbox Cleanup feature:

1.   From the **Tools** menu, select **Mailbox Cleanup**.

2.   To see the overall size of your mailbox, as well as the size of each folder within your mailbox, click on **View Mailbox Size**

3.   To find items older than a specified number of days, enter the number of days in the appropriate box and click **Find**. Once found, the items can be deleted or moved to a personal folder.

4.   To find items larger than a specified size, enter the size in the appropriate box and click **Find**. Once found, the items can be deleted or moved to a personal folder.

5.   To empty the Deleted Items folder, click on **Empty**.

Miscellaneous Outlook Tips & Tricks

1.   Quickly mark a message as read or unread by right-clicking the message in the message list and selecting Mark as Read or Mark as Unread. The option on the menu will depend upon whether you right-clicked on a message that is currently read or unread.
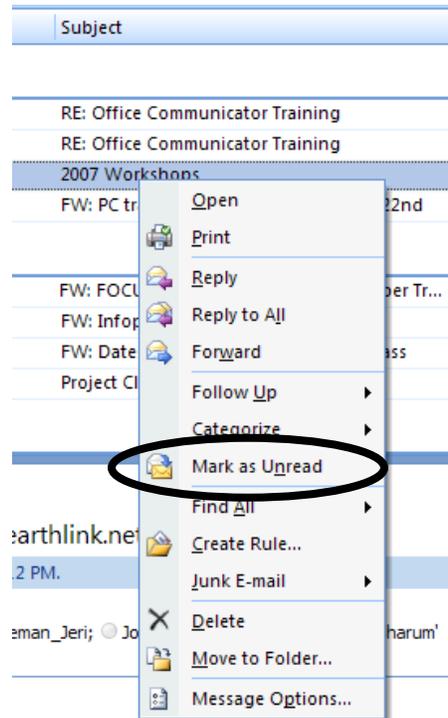
2.   Quickly add an e-mail message to your Calendar by dragging the message to the **Calendar** button in the Navigation Pane.
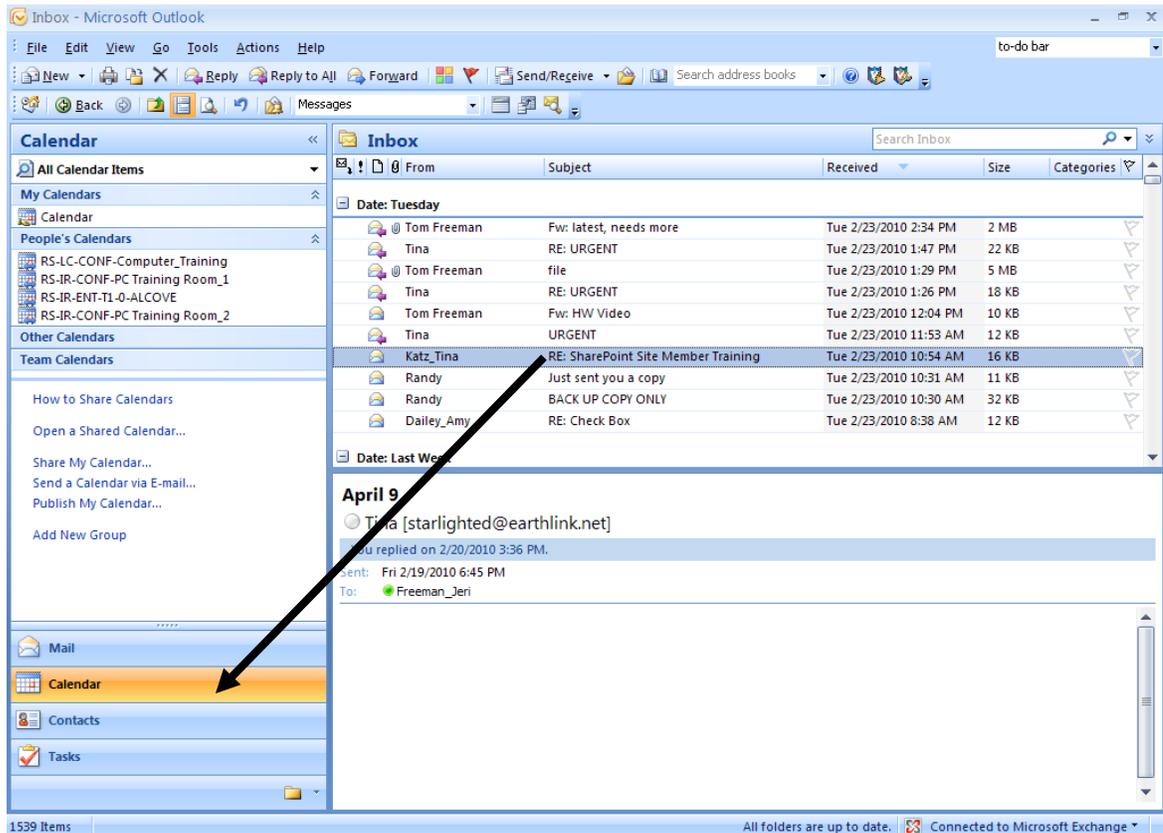

Specify the correct *Start time* and *End time* and click **Save and Close**.

3.   Set up a reminder for a message by right-clicking the message for which you want a reminder, pointing to **Follow Up** and clicking **Add Reminder**. In the *Flag to* field, type or select the text to be displayed in the reminder. In the *Reminder* field, select the date and time you wish the reminder to appear and click **OK**.
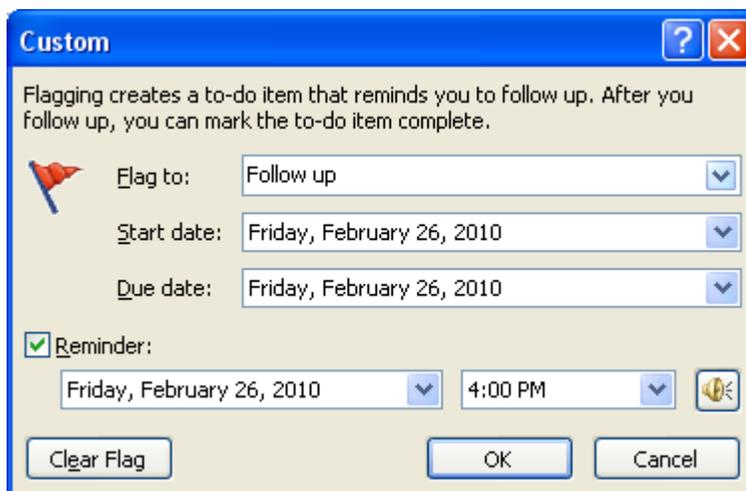
4.   Recall a message you have sent by opening that message in the Sent Items folder and clicking the **Other Actions** button on the *Message* tab of the Ribbon. Select **Recall This Message** from the drop-down menu. If the recipient has not yet opened the message, it will be removed from their mailbox.

5.   Quickly test a hyperlink you have typed in a message before you send the message by holding down the **[Ctrl]** key while you click the hyperlink.

6.   Delete names from the AutoComplete list that appears when you are typing an address in a new message by arrowing up or down to the name to be deleted and pressing the **[Del]** key.

7.   Customize the text displayed in Vote button drop-down menu of a message you are sending by clicking **Use Voting Buttons** on the *Options* tab of the Ribbon and selecting **Custom**. Type the desired options for the drop-down in the *Use voting buttons* field, separating each name with a semicolon, as shown below.
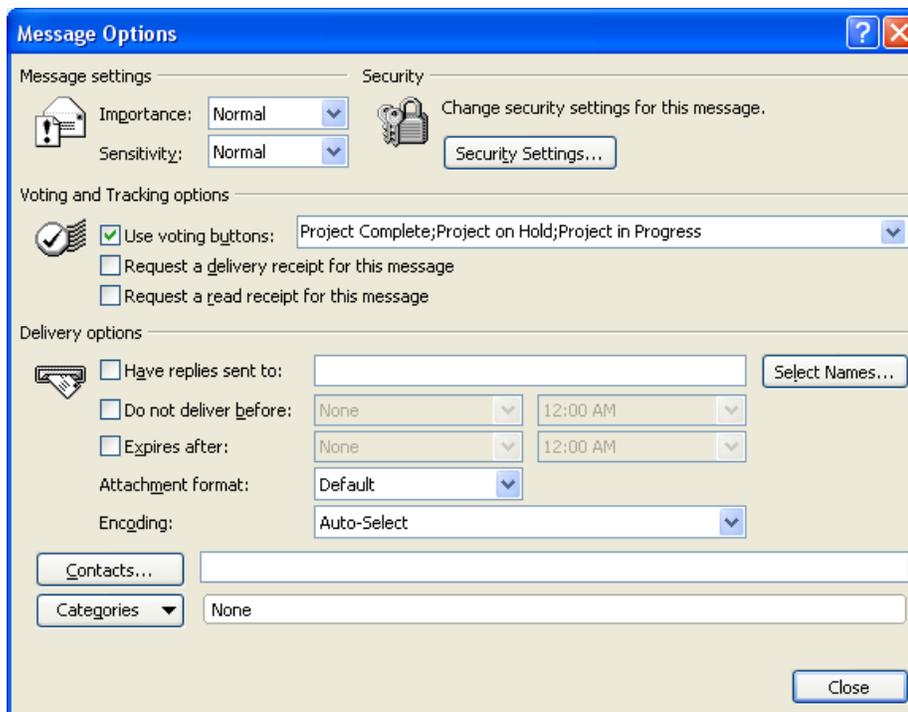

8.   Quickly send a reminder or other message to the attendees of a meeting by opening the original meeting request and clicking the **Message to Attendees** button on the *Meeting* tab of the Ribbon, then selecting **New Message to Attendees**.

9.   If you are sending a Meeting Request to a large group and don't want to receive responses to this request, click the **Responses** button on the *Meeting* tab and select **Request Responses** before sending the request.

10.   The Calendar displays 30 minute time periods by default, but this can be changed by right-clicking the time slots along the left side of the Calendar and selecting the desired length from the shortcut menu.

11.   To add an additional time zone to your Calendar, right-click the time slots along the left side of the Calendar and select **Change Time Zone** from the shortcut menu. Click *Show an additional time zone* and set the remaining options, as necessary.
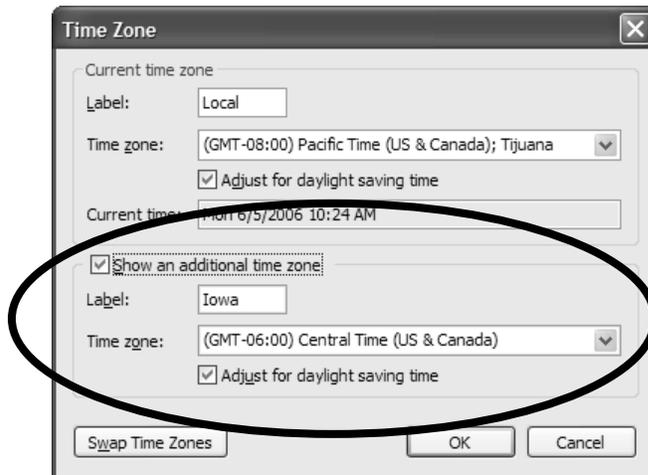
12.   Quickly send a message to a contact, or schedule a meeting with a contact, by dragging the contact to either the **Mail** or **Calendar** button in the Navigation Pane.
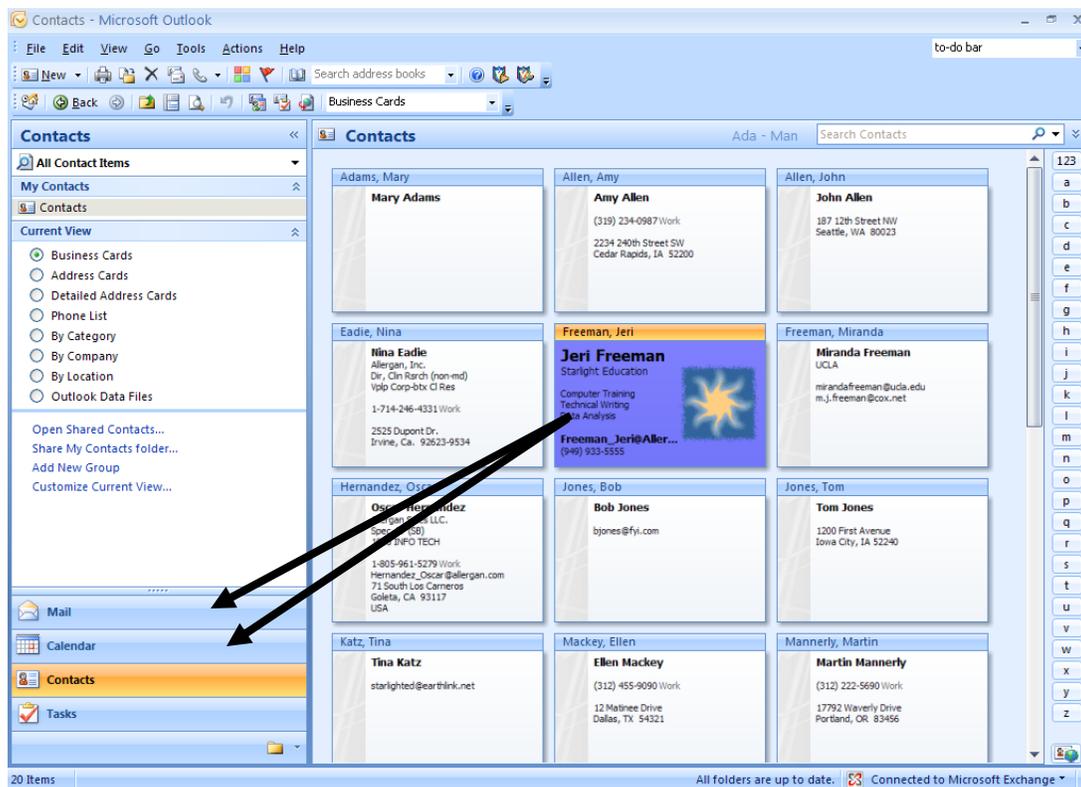
13.   Quickly create a contact with the same company name and address as an existing contact by selecting the existing contact and then selecting **New Contact from Same Company** from the **Actions** menu.

14.   Set Outlook to automatically spell check all of your outgoing messages by selecting **Options** from the **Tools** menu. Click the *Spelling* tab and click on *Always check spelling before sending*, as shown below. Click the **Spelling and AutoCorrection** button to set other spelling options.
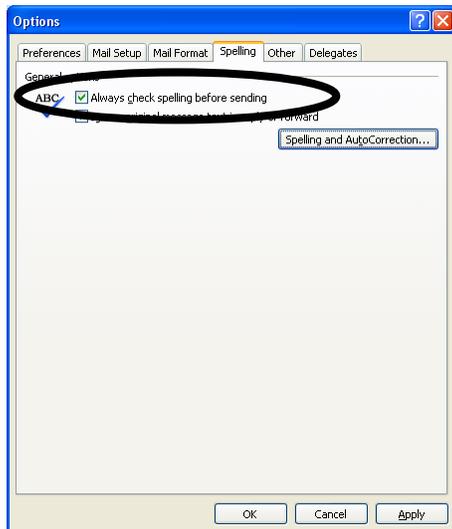
15.   If you have customized the view of your Inbox, Calendar or any other folder, you can save this customized view for reuse by clicking in the *Current View* box on the Advanced toolbar, typing a name for the custom view and pressing **[Enter]**. The newly named view will now appear on the drop-down list whenever you navigate to this folder.

16.   You can change the name of your Personal Folders folder by right-clicking that folder and selecting **Properties for *personal folder name*** from the shortcut menu. Click the **Advanced** button and type a custom name in the *Name* box.

17.   Folders in the Navigation Pane display in alphabetical order. To have certain folders appear at the top of the list, precede their name with the underscore (_) symbol.

18.   Quickly create a Word document, Excel workbook or PowerPoint presentation from Outlook by pressing **[Ctrl]+[Shift]+[H]**.

Useful Outlook Keyboard Shortcuts

Press this key combination	To accomplish this task
[Alt]+[F1]	Switch the Navigation Pane on and off
[Ctrl]+[Shift]+[M]	Create a new mail message
[Ctrl]+[Shift]+[C]	Create a new contact
[Ctrl]+[1]	Switch to Mail view
[Ctrl]+[2]	Switch to Calendar view
[Ctrl]+[3]	Switch to Contacts view
[Ctrl]+[4]	Switch to Tasks view
[Ctrl]+[5]	Switch to Notes view
[Ctrl]+[R]	Reply to the sender of the current mail message
[Ctrl]+[Shift]+[R]	Reply to the sender and all recipients of the current mail message
[Ctrl]+[F]	Forward the current mail message
[Ctrl]+[D]	Delete the current mail message
[Shift]+[Click]	Select all messages between the currently selected message and the one on which you [Shift]+[Click]
[Ctrl]+[Click]	Select the message(s) on which you [Ctrl]+[Click], in addition to any other selected messages
[Ctrl]+[A]	Select all items in a folder
[Alt]+[S]	Send the current message or save the current contact, calendar item, etc.
[Ctrl]+[Shift]+[I]	Switch to the Inbox