

## About E-Mail Basics

The volume of e-mail you receive can be overwhelming. Microsoft® Office Outlook® 2007 offers tools to help manage your messages.

Topics in this guide include:

- Group Messages in Folders
- Use the To-Do Bar
- Assign Categories to Messages
- Search for Messages with the Search Box
- Use E-Mail Rules to Route Messages

## Group Messages in Folders

The first step to organize your Outlook 2007 Inbox is to create folders to group your messages. You can group by topic, project, sender, and more.

- 1 On the **File** menu, point to **New**, and then click **Folder**.
- 2 Type a name for the folder.
- 3 Navigate to where you want to place the folder, and then click **OK**.
- 4 Drag the messages you want into the new folder.
- 5 Repeat process for other folders.

**Tip** Use E-Mail Rules to automatically route incoming messages into your folders. For more information, see “Use E-Mail Rules to Route Messages” later in the guide.

## Use the To-Do Bar

The Outlook 2007 To-Do Bar is a place to keep track of your schedule and tasks. It features a small monthly calendar (called the Date Navigator), an appointments list, and a task list. You can perform many Outlook 2007 tasks directly within the To-Do Bar.

To do this	Perform this action
Change the amount of information shown	On the <b>View</b> menu, point to the <b>To-Do Bar</b> , and then click <b>Options</b> .
Create a meeting request from a message	Drag a message to a date on the Date Navigator.
Create a meeting request from a task	Drag a task from the task list to a date on the Date Navigator.
Create a task	Type a task in the <b>Type a new task</b> box.
Create a task from a message	Drag a message to the task list.
Accept or decline a meeting	Right-click the meeting request in the appointments list, and then click <b>Accept</b> or <b>Decline</b> .
Flag a message for follow up	Drag the message to the task list.
Open a date on the full Calendar	On the Date Navigator, click a date.
Open the To-Do Bar	On the <b>View</b> menu, point to the <b>To-Do Bar</b> , and then click <b>Normal</b> .

## Assign Categories to Messages

Another way to organize your e-mail messages is to categorize them. This means assigning category labels to your messages.

For example, you can create a “budget” category and assign it to every message you have related to your team’s budget. Afterwards, you can sort all your messages by category to find all your budget mail.

Begin by creating a new category. **Note** The following procedure uses “budget” as an example.

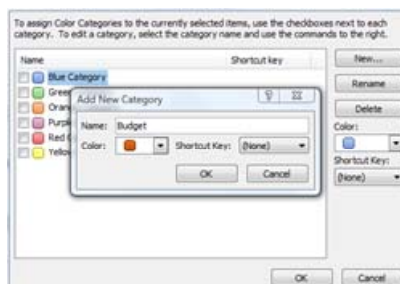
**1** Right-click a message, point to **Categorize**, and then click **All Categories**.

**2** In the **Color Categories** dialog box, click **New**.

**3** In the **Add New Category** dialog box, type a name for your new category. For example, *Budget*.

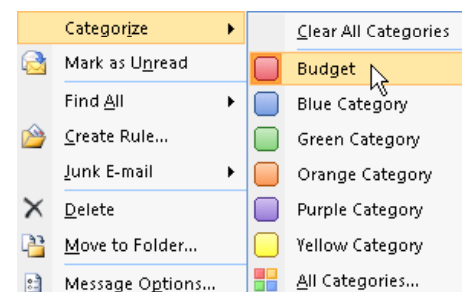
**4** Click the **Color** arrow and select a color for the new category.

**5** Click **OK**, and then click **OK** again.



Next, apply the **Budget** category to messages that relate to it.

**6** Right-click a (closed) budget message, point to **Categorize**, and then click **Budget**.



**7** Repeat this process for all budget-related messages.

Now, to sort your e-mail by Categories, right-click the “Arranged By” bar at the top of the Inbox window, and then click **Categories**.

Your e-mail will be arranged by categories, with uncategorized messages appearing first. Scroll down the list to see categorized messages.

### Tips

- Assign a category to more than one message at a time by selecting multiple messages, and then applying the category. You can also apply more than one category to a single message.
- Assign a category to an open message by clicking **Categorize** on the message toolbar, and then clicking a category.
- Rename the default categories—Blue, Green, and so on—to names that mean something specific to you. On the **Actions** menu, point to **Categorize**, and then click **All Categories**.

## Use Colors and Flags to Organize Messages

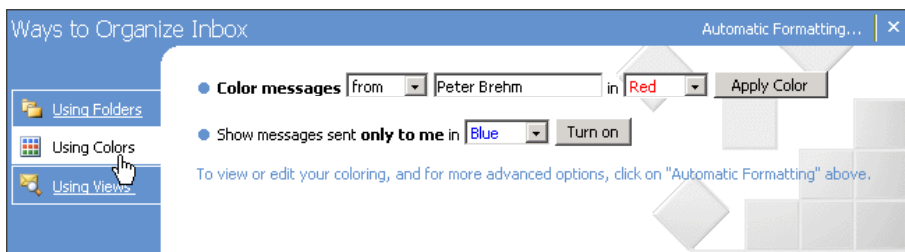
It can be difficult to quickly identify messages in your Inbox. By applying colors to message headers, you can find certain messages immediately.


You can also apply flags to messages. Flags provide visual reminders of a message's importance. In addition to creating a visual reminder, you can set flags to open messages at a pre-determined time.

When you flag a message, it automatically appears in your To-Do Bar and Task List, making it easier to track.


### To Color Messages

- 1 In **Mail** view, select an e-mail message to color.
- 2 On the **Tools** menu, click **Organize**.
- 3 Under **Ways to Organize Inbox**, click **Using Colors**.



- 4 Select the criteria you want, select a color, and then click **Apply Color**. Click  to close the **Organize** box.

### To Flag a Message

- 1 In **Mail** view, right-click the flag icon  next to the message you want to flag.
- 2 Click a flag option. The message appears in your To-Do Bar so you can see when to take action.



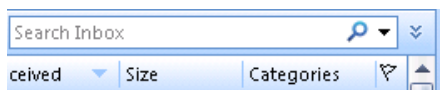
### Notes

- To apply the default flag to a message, single-click the flag icon.
- To change the default flag, right-click the flag icon, and then click **Set Quick Click**.
- To set a reminder as well, right-click the flag icon, and then click **Add Reminder**.
- To mark a flagged message as complete, click the flag icon.

## Search for Messages with the Search Box



The Search box helps you find messages in your Inbox that contain key words or phrases, or messages that meet other search criteria.

- Click a folder to search in, and in the **Search** box at the top of the window, type one or more words.



The Search feature immediately begins looking for messages that match your criteria. You do not need to press Enter.

### Tips

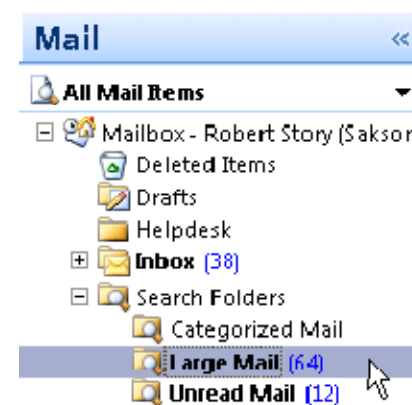
- To narrow your search, type more than one word in the **Search** box.
- To perform a more powerful search, click  , and then enter additional search criteria.
- After your search results appear, return to the regular mail window by clicking  .

## Use Search Folders

Search Folders show you where messages that fall into certain categories are stored in your Mailbox. Three Search Folders exist by default: Categorized Mail, Large Mail, and Unread Mail.

- In **Mail** view, in the **Mail** pane, expand the **Search Folders** tree, and then click one of the default Search Folders.

All messages in that category appear, along with the folder in which they are stored.

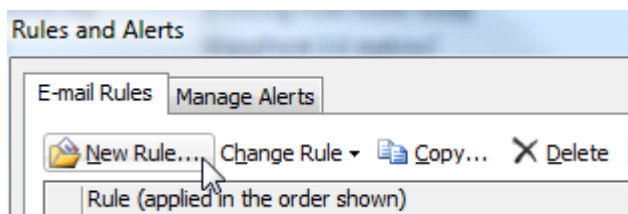


**Note** You can create new Search Folders for messages that don't fall into default categories. On the **File** menu, point to **New**, and then click **Search Folder**. In the **New Search Folder** dialog box, click a pre-defined Search Folder, or scroll to the bottom of the dialog box and click **Create a Custom Search Folder**. Follow the instructions.

## Use E-Mail Rules to Route Messages

Outlook 2007 E-Mail Rules save you time and make e-mail organization easier by automatically routing incoming and outgoing messages based on criteria that you establish.

- 1 In **Mail** view, on the **Tools** menu, click **Rules and Alerts**. If you have more than one e-mail account, select the Inbox you want to apply the rule to.
- 2 In the **Rules and Alerts** dialog box, click **New Rule**.



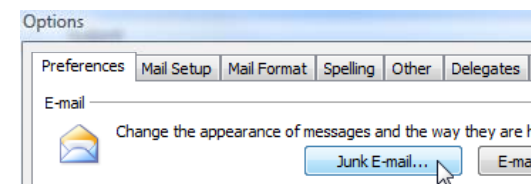
- 3 Follow the **Rules Wizard**. When you reach the last page of the wizard, click **Finish**.
- 4 To activate the new rule, in the **Rules and Alerts** dialog box, click **OK**.

## Reduce Unwanted Mail with Junk Filters

Unwanted e-mail can get through corporate filters. Help keep such mail out of your Inbox by using Junk E-Mail filters. These filters send e-mail identified as junk to a separate mail folder.

- 1 On the **Tools** menu, click **Options**.

- 2 In the **Options** dialog box, on the **Preferences** tab, click **Junk E-mail**.



- 3 On the **Options** tab of the **Junk E-mail Options** dialog box, click a protection level. Microsoft IT recommends **High** to provide the greatest protection.

### Notes

- Review the Junk E-mail folder to ensure that no legitimate messages have been sent there. If they have, adjust the filter to avoid flagging such messages in the future.
- Use other tabs on the **Junk E-mail Options** dialog box to add **Safe Senders**, **Safe Recipients**, and **Blocked Senders** to your filter.
- Outlook 2007 disables links suspected of being used for “phishing.” Phishing is the use of fake e-mail messages to solicit valuable personal information. To re-enable such links, click **Enable Links and other functionality (not recommended)** in the InfoBar at the top of the message. You should not bypass this feature unless you are *certain* the links are trustworthy.

## Manage E-Mail Attachments

Keeping e-mail attachments with their original messages is a convenient way to store them. But attachments take up a lot of space, and if you are concerned with mailbox size restrictions, you can save attachments to your computer or delete them entirely. Decide what is right for you and then take appropriate action.

**1** Click a message with an attachment.

**2** Click the attachment to preview it in the Reading Pane.

**Note** Not all files can be previewed in the Reading Pane.

**3** On viewing it, determine whether to keep the attachment with the message, save it to your computer, or delete it:

- To keep the attachment with the message, do nothing.
- To save a single attachment to your computer, on the **File** menu, point to **Save Attachments**, and then click the attachment.
- To save all attachments in the message to your computer, on the **File** menu, point to **Save Attachments**, and then click **All Attachments**.
- To delete an attachment, you must delete the entire message. Save any attachments you want to keep, and then on the **Edit** menu, click **Delete**.