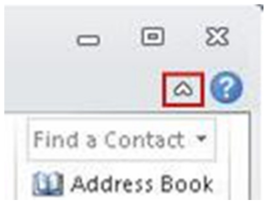
Microsoft Outlook Reference Card

Minimize or maximize the Ribbon

- Click the small **Minimize/Maximize** button in the upper-right corner of the Outlook Window.



Change the arrangement of a folder

To switch between simple **Date** arrangement and **Date (Conversations) arrangement**:

- On the **View** tab of the ribbon, in the **Conversations** group, click **Show as Conversations** to either select or clear the check box and then, in the **Microsoft Outlook** dialog box, indicate whether you want to apply the change to all Outlook folders or only to the current folder.

To change from either **Date** arrangement or **Date (Conversations)** arrangement to any non-Date arrangement (or back again):

- On the **View** tab of the ribbon, in the **Arrangement** group, click the arrangement that you want. Depending on your screen resolution and the size of the Outlook window, you may have to click the **Arrange By** button to see the list of arrangements.

Add a command to the Quick Access Toolbar

- On the ribbon, right-click the command, button, or feature that you want to add to the Quick Access Toolbar, and then, on the shortcut menu, click **Add to Quick Access Toolbar**.

Remove a command from the Quick Access Toolbar

- On the Quick Access Toolbar, right-click the command that you want to remove, and then, on the shortcut menu, click **Remove from Quick Access Toolbar**.

Use Key Tips (the new keyboard shortcuts)

- Press the ALT key, and then press the key that corresponds to the tab, menu, or command that you want.
  To clear Key Tips from the screen, press ESC.

Print an e-mail message

1. Press CTRL+P to go to the **Print** tab in Backstage view.
2. Choose the options and settings that you want.
3. Click the big **Print** button.

Open the Outlook Options dialog box

- Click the **File** tab to open Backstage view and then, in the left pane, click the **Options** button.

Reply to a message with a meeting invitation

1. Select the message to which you want to reply with a meeting invitation and then, on the **Home** tab, in the **Respond** group, click **Meeting**.
2. In the meeting invitation that opens, add any other people that you want to include in the invitation on the **To** line.
3. Make any changes that you want to the **Subject** line.
4. Either manually specify a location, a date, and start and end times, or use the options in the **Room Finder** pane to specify them.
5. Add any appropriate text in the message body.
6. Click **Send**.

Use Clean Up to clear out redundant messages from a single conversation or a whole folder

1. Click a conversation that you want to clean up, or any conversation in a whole folder that you want to clean up.
2. On the **Home** tab of the ribbon, in the **Delete** group, click **Clean Up**. and then, on the drop-down menu, click one of the following:

- **Clean Up Conversation** To clean up the selected conversation.
- **Clean Up Folder** To clean up all conversations in the current folder, but not those in the current folder's subfolders.
- **Clean Up Folder & Subfolders** To clean up all conversations both in the current folder and in all of its subfolders.

Change where Clean Up sends the messages it clears out

1. Click the **File** tab to open Backstage view and then, in the left pane, click the **Options** button.
2. In the **Outlook Options** dialog box, click the **Mail** tab in the left pane, and then scroll down to the **Conversation Clean Up** section.
3. In the **Cleaned-up items will go to this folder** box, browse to and select the new destination folder, and then click **OK**.

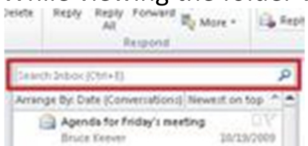
The check boxes here provide additional options for customizing **Clean Up**.

Use Ignore to delete all messages in a conversation, including future ones

- Click the conversation that you want to ignore and then, on the **Home** tab of the ribbon, in the **Delete** group, click **Ignore**.

Search

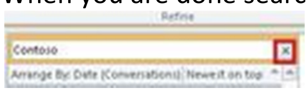
1. While viewing the folder where you expect to find the item, click in the **Search** box.



2. Do either or both of the following:

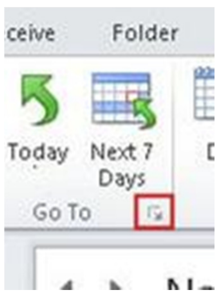
- In the **Search** box, type some text from the item that you want to find.
- Use the options on the **Search** tab to broaden or narrow the focus of your search until you find the item that you are searching for.

3. When you are done searching, click the **Stop Search** button at the end of the **Search** box.



Get around in your calendar

1. On the **Home** tab in the Calendar, click the small arrow in the bottom corner of the **Go To** group.



2. Use the options in the **Go To Date** dialog box to specify the date you want to go to, and then click **OK.**.
3. To get back to today, click the **Today** button (in the **Go To** group on the **Home** tab).

Create a signature

1. Click the **File** tab to open Backstage view and then, in the left pane, click the **Options** button.
2. In the left column of the **Outlook Options** dialog box, click **Mail**.
3. Under **Compose messages**, in the **Create or modify signatures for messages** subsection, click the **Signatures** button.
4. Use the options in the **Signatures and Stationery** dialog box to create your signature.
   Note To open this dialog box from a new e-mail message, click the **Signature** button in the **Include** group on the **Message** tab of the ribbon, and then click **Signatures**.

Add an additional e-mail account

1. Click the **File** tab to open Backstage view and then, in the left pane, click the **Info** tab.
2. Click **Add Account and follow the prompts.**

Flag an item for follow up

Applying a flag to a message or a contact in Microsoft Outlook gives you a visual reminder to follow up on it in some way. You can use flags with default dates, such as **Today**, **Tomorrow**, and **Next Week**, or customize your flags with specific dates.

How do the flag dates on the Follow Up menu work?

The following table describes how the dates work for the flags on the **Follow Up** menu, which is in the **Tags** group. However, you can customize the dates and set reminders for any flag.

Flag	Start date	Due date	Reminder
Today	Current date	Current date	One hour before the end time of today's work day
Tomorrow	Current date plus one day	Current date plus one day	Start time of current day plus one work day
This Week	Current date plus two days, but no later than the last work day of this week	Last work day of this week	Start time of current day plus two work days
Next Week	First work day of next week	Last work day of next week	Start time of the first work day of next week
No Date	No date	No date	None
Custom	Current date is displayed; choose a custom date if desired	Current date is displayed; choose a custom date if desired	Current date is displayed; choose a custom date if desired

Add a flag to a message

Flags create a visible reminder that an action is due. When a message is flagged, a flag appears for that message in the message list. Flagged items also appear in the To-Do Bar, in the Daily Task List in Calendar, and in the To-Do List in the Tasks view.

In addition to flags, you can include a reminder that alerts you at a pre-determined time.

As you hover over flagged messages in the Task List, the details that are associated with the flag appear, such as the due date, the type of follow up that is needed, or a when a reminder will appear.

Do one of the following:

- In an open message, on the **Home** tab, in the **Tags** group, click **Follow Up**, and then click a flag.

- In a message list, such as your Inbox, click to the right of the item to set your default flag. For more default date options, right-click on the flag and select from the drop down list.

Tip You can also assign a flag to a message with one click. For more information, see Add a Quick Click flag

If you want more options for the due date, you can add a flag with a custom date.

- In an open message, on the **Home** tab, in the **Tags** group, click **Follow Up**, and then click **Custom**.
- In a message list, such as your **Inbox**, right-click , and then select **Custom**.
- In the **Start Date** and **Due Date** boxes, select the dates that you want.

Note Flagging an item does not assign a reminder to the item. You can add a reminder by right-clicking the flagged item and selecting **Add Reminder**. For more information, see Add a flag with a reminder date

Add a flag to a contact

Flags can also be applied to contacts. A flag on a contact gives a visible reminder to take an action related to the contact, such as calling or contacting someone. Flagged contacts appear in the To-Do Bar, Daily Task List in Calendar, and in the Tasks view.

Do one of the following:

- In an open contact, on the **Contact** tab, in the **Tags** group, click **Follow Up**, and then click a flag.
- In **Contacts**, click on the contact you want to flag. Then, on the **Home** tab, in the **Tags** group, click **Follow Up**, and then click a flag.

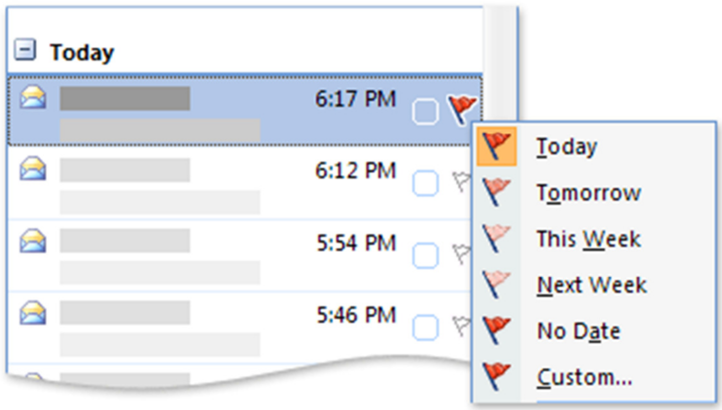
Tip You can also assign a flag to a message with one click. For more information, see Add a Quick Click flag

If you want more options for the due date, you can add a flag with a custom date.

- In an open contact, on the **Contact** tab, in the **Tags** group, click **Follow Up**, and then click **Custom**.
- In **Contacts**, click on the contact you want to flag. Then, on the **Home** tab, in the **Tags** group, click **Follow Up**, and then click **Custom**.
- In the **Start Date** and **Due Date** boxes, select the dates you want.

Add a Quick Click flag

If there is one flag that you frequently use, such as Next Week, you can assign that as your Quick Flag. When you click the flag column, the Quick Flag is applied. By default, the Quick Click flag is set for **Today**.



Note When you change the default Quick Click flag, items you have previously flagged are not changed.

Assign a Quick Click flag to a message

- In your **Inbox**, to the right of a message, click the **Flag Status** column. This adds the flag that you selected as your Quick Click flag to the column.

Note A Quick Click flag can be added to multiple messages at the same time. Press and hold CTRL as you click each message, and then click the **Flag Status** column next to one of the messages.

Assign a Quick Click flag to a contact

- In **Contacts**, in a table view such as **By Follow Up Flag**, next to a contact, click the **Flag Status** column. This adds the flag that you selected as your Quick Click flag to the column.

Note A Quick Click flag can be added to multiple contacts at the same time. Press and hold CTRL as you click each contact, and then click the **Flag Status** column next to one of the messages.

Add a flag with a reminder

If you want to be reminded to take action on a flagged item, you can add a reminder. For example, you can add a reminder for a message so that you remember to reply by a certain time, or you can add a reminder for a contact to remember to return a telephone call.

1. Do one of the following:
    - In an open message, on the **Home** tab, in the **Tags** group, click **Follow Up**.
    - In **Contacts**, click on the contact you want to flag. Then, on the **Home** tab, in the **Tags** group, click **Follow Up**.

Tip You can also add a flag with a reminder to an item in a table view. In your **Inbox** or in a list of contacts, select an item, and then click **Follow Up** in the **Tags** group.

2. On the **Follow Up** menu, click **Add Reminder**.
3. In the **Reminder** list, click the arrow, and then select the date when you want to be reminded.
4. Then, select the time of day to be reminded.

Tip You can also select other information for the item in the **Start date**, **Due date**, and **Flag to** boxes. In the **Flag to** list, you can select other text, such as **Review** or **Reply to all**, to reinforce what the reminder is for. This text appears in the InfoBar in the message. You can also type your own text into the **Flag to** box.

5. To change the default reminder sound, click the speaker icon, and then browse to a sound file. If the **Play this sound** check box is cleared, select it.

Add a flag for recipients

If you want to encourage people to reply to a message or you want to request other actions from them, you can send them a flagged message. You can add text that is specific to your request. You can choose from several options in a list or type your own text. The default text is **Follow Up**.

1. In a new message, on the **Message** tab, in the **Tags** group, click **Follow Up**.
2. On the **Follow Up** menu, click **Flag for Recipients**.
3. In the **Flag to** list, select an action, or type your own text. What you select or type here appears in the InfoBar in the message that the recipient receives.
4. If you do not want to send a reminder with the message, clear the **Reminder** box.
5. If you want to send a reminder with the message, in the **Flag for Recipients** section, select a date and time from the lists. If you do not want to send a reminder, clear the **Reminder** box.

Add a flag automatically with a rule

A rule is an action that Outlook performs automatically upon incoming or outgoing messages based on conditions that you have specified. You can decide what happens to your unread messages — for example, messages from a particular person or group — before they arrive in your Inbox.

1. Click the **File** tab.
2. Click **Manage Rules & Alerts**.
3. Click **New Rule**.
4. Under **Step 1: Select a template** in the Rules Wizard, click **Flag messages from someone for follow-up**.
5. Click **Next**.
6. Follow the instructions in the Rules Wizard.

Note To apply this rule to all accounts and each **Inbox** folder, select the **Create this rule on all accounts** check box on the last page in the Rules Wizard.

Assign a color category to an email message

Color adds visibility to your Outlook items. Color categories can be assigned to email messages in Microsoft Outlook, which enables you to quickly identify them and associate them with related items. You can assign more than one color category to messages, or use a [Quick Click category]() to click once and assign a color category to a message in your **Inbox**.

Assign a color category to a message

A color category must be in the color category list before you can assign it. If a color category is not listed, you can [create a new color category]() and assign it to an item for the first time. You can also choose from several default color categories and rename them to be more meaningful to you.

To assign a color category, do the following:

- **For a message in your Inbox or any message list** Right-click the message, point to **Categorize**, and then click a color category.
- **For an open message** On the **Message** tab, in the **Options** group, click **Categorize**, and then click a color category.

To see more categories or to create a category, click **All Categories** to open the **Color Categories** dialog box. To assign a color category from the **Color Categories** dialog box, you must select the check box next to the color category. The **Color Categories** dialog box is also a quick way to assign multiple categories to an item.

The first time that you assign a default color category to an item, you'll be prompted to rename the category. At this time, you can also change the color of the category and choose a keyboard shortcut.

Notes

- You can change the color associated with a category at any time.
- Another way to open the **Categorize** menu and **Color Categories** dialog box is by clicking **Categorize** on the ribbon, on the **Tags** tab.
- Only the 15 most recently used color categories appear on the **Categorize** menu. To see the rest, click **All Categories** on the **Categorize** menu.

Assign a Quick Click category to a message

With a single click, you can assign a color category to an item in your Inbox or any [message list]() by setting a default Quick Click category. This can be especially helpful if you focus on one main project or frequently categorize items as Important, Review Immediately, and so on.

Set a Quick Click category

1. On the **Home** tab, in the **Tags** group, click **Categorize**, and then click **Set Quick Click**.
2. In the **Set Quick Click** dialog box, in the drop-down list, select a color category.

Tip From an open message, you can click **Set Quick Click** on the **Categorize** menu to set the default color category for all future messages, not just the message that is selected.

Note If you change the Quick Click category, it does not change the color category assigned to previously marked messages.

Assign a Quick Click category

- In your **Inbox**, click the **Categories** column next to a message. This adds the color set for your Quick Click category to the column. If you open the message, the color and the name of the color category appear in the header.

Tip A Quick Click category can be assigned to other Outlook items, such as Contacts, Tasks, and Calendar appointments, in the same manner when they are viewed in table views or in the To-Do Bar.

Automatically reply to email messages with an Exchange Server account (formerly Out of Office Assistant)

You can set up Microsoft Outlook 2010 to automatically respond to people who send you send an email message. This helps inform people that you aren't in the office or that your response might be delayed. Automatic Replies can include details, such as alternate contact information.

Note A Microsoft Exchange Server account is required. This feature doesn't work with POP3 or IMAP email accounts.

Important The **Automatic Replies** command is available only in Outlook 2010 when it is used with a Microsoft Exchange Server account. If you are using a Windows Live Hotmail, Google Gmail, POP3, or IMAP account, see Automatically reply to email messages without using an Exchange Server account.

Turn Automatic Replies on or off

If you aren't sure which version of Exchange Server your account uses, see Determine the version of Microsoft Exchange Server my account connects to

1. Click the **File** tab.
2. Click **Automatic Replies**.

If you don't see this command, you probably don't have an Exchange Server account.

3. Select **Send automatic replies**.
4. If you want, select the **Only send during this time range** check box to schedule when your out of office replies are active. If you don't specify a start and end time, auto-replies are sent until you select the **Do not send automatic replies** check box.
5. On the **Inside My Organization** tab, type the response that you want to send to teammates or colleagues while you are out of the office.
6. On the **Outside My Organization** tab, select the **Auto-reply to people outside my organization** check box, and then type the response that you want to send while you are out of the office. Select whether you want replies sent to **My contacts only** or to **Anyone outside my organization** who sends you messages.

Notes

- Organization is usually defined as your company and includes people who have an Exchange Server account on your email system.
- If you select **My Contacts only**, replies are sent only to contacts that exist in your Exchange Server **Contacts** folder. If the contact exists only in a folder that is a part of an Outlook Data File (.pst), then the auto-reply message isn't sent.

Microsoft Exchange 2003 accounts

1. Click the **File** tab.
2. Click **Automatic Replies**.
3. Click **I am currently Out of the Office**.
4. In the **AutoReply only once to each sender with the following text** box, type the message that you want to send to other people while you are out.

Use rules with Automatic Replies

If you aren't going to check email messages while you are out of the office, use Automatic Replies with rules to automatically manage incoming messages by specifying what action Outlook should take with them. For example, you can create rules to automatically move or copy messages to other folders, to delete messages, to send custom replies, and so on.

1. Click the **File** tab.
2. Click **Automatic Replies**.
3. Click **Rules**, and then click **Add Rule**.
4. Under **When a message arrives that meets the following conditions**, specify the conditions that the message must meet for the rule to be applied. If you want to specify more conditions, click **Advanced**, enter or select the options that you want, and then click **OK**.
5. If you want to specify that this rule must be applied last, select the **Do not process subsequent rules** check box.
6. Under **Perform these actions**, select the actions that you want. You can select more than one action.
7. Click **OK** three times.

Notes Follow the previous procedure also to edit Automatic Replies rules that you already have.

- To turn Automatic Replies rules on or off, in the **Automatic Reply Rules** dialog box, select or clear the check box of the rule that you want to turn on or off.

Automatically reply to email messages without using an Exchange Server account

NOTE If you use a Microsoft Exchange Server account in Microsoft Outlook 2010, use the Automatic Replies feature. SeeAutomatically reply to messages (formerly the Out of Office Assistant). This article is for all other email account types, such as Windows Live Hotmail, POP3, and IMAP.

+How can I tell if I am using a Microsoft Exchange Server account?

You can set up Outlook 2010 to send an automatic response to some or all of the people who send you email messages.

You can combine an Outlook email template with Outlook rules to reproduce the functionality of the Automatic Replies feature that is available only to Exchange Server accounts.

IMPORTANT This functionality is available in Outlook 2010 beginning with Microsoft Office 2010 Service Pack 1.

Step 1: Create a message template

TIP Download a formal or informal out of office message template from Microsoft Office.com

1. On the **Home** tab, in the **New** group, click **New E-mail**.
2. In the message body, type the message that you want to send as your automated reply.
3. In the message window, click the **File** tab, and then click **Save As**.
4. In the **Save As** dialog box, in the **Save as type** list, click **Outlook Template (*.oft)**.
5. In the **File name** box, type a name for your message template, and then click **Save**.

Step 2: Create a rule to automatically reply to new email messages

Do one of the following:

1. On the **Home** tab, in the **Move** group, click **Rules**, and then click **Manage Rules & Alerts**.
2. In the **Rules and Alerts** dialog box, click **New Rule**.
3. Under **Start from a blank rule**, click **Apply rules on messages I receive**, and then click **Next**.
4. Under **Which condition(s) do you want to check?**, select any criteria that you want, and then click **Next**. Typically, you don't need to select any items.
5. Under **What do you want to do with the message?**, select the **reply using a specific template** check box.
6. Under **Step 2: Edit the rule description (click an underlined value)**, click **a specific template**.
7. In the **Select a Reply Template** dialog box, in the **Look In** box, click **User Templates in File System**.
8. Select the template that you created in the previous section or one that you have created or downloaded, and then click **Open**.
9. Click **Next**.
10. Select the check boxes for any exceptions to the auto-reply rule. It is common not to add any exceptions.
11. Click **Next**.
12. Under **Step 1: Specify a name for this rule**, type a name for the auto-reply rule, and then click **Finish**.

IMPORTANT For the Rules Wizard to send a reply automatically, Outlook must be running and configured to check periodically for new messages.

The **reply using a specific template** rule in the Rules Wizard sends your automated reply only one time to each sender during a single session. A session is every time that you start Outlook until you exit the application. This rule prevents Outlook from sending repetitive replies to a single sender from whom you receive multiple messages. During a session, Outlook keeps track of the list of users to whom it has responded. If you exit and then restart Outlook, it is considered a new session and the list of the senders who have received automated replies is reset.

TIP Consider creating an Outlook task or to-do reminder to help you remember to turn off this rule when you want to stop sending automatic replies.

Turn off automatic replies

To turn off a rule that is sending automatic replies, do the following:

1. On the **Home** tab, in the **Move** group, click **Rules**, and then click **Manage Rules & Alerts**.

On the **E-mail Rules** tab, under **Rule**, clear the check box for the rule that you want to turn off.

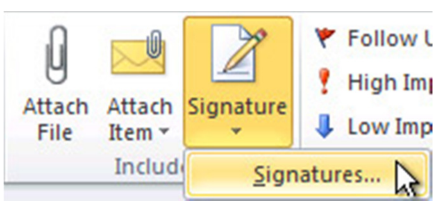
Create and add an email message signature

You can create personalized signatures for your email messages that include text, images, your electronic business card, a logo, or even an image of your handwritten signature.

Your signature can automatically be added to outgoing messages, or you can manually add the signature to only the messages that you choose.

Create a signature

1. Open a new message. On the **Message** tab, in the **Include** group, click **Signature**, and then click **Signatures**.



2. On the **E-mail Signature** tab, click **New**.
3. Type a name for the signature, and then click **OK**.
4. In the **Edit signature** box, type the text that you want to include in the signature.
5. To format the text, select the text, and then use the style and formatting buttons to select the options that you want.
6. To add elements besides text, click where you want the element to appear, and then do any of the following:

Options	How to
To add an electronic business card	Click **Business Card**, and then click a contact in the **Filed As** list. Then click **OK**
To add a hyperlink	Click **Insert Hyperlink**, type in the information or browse to a hyperlink, click to select it, and then click **OK**
To add a picture	Click **Picture**, browse to a picture, click to select it, and then click **OK**.

Common image file formats for pictures include .bmp, .gif, .jpg, and .png.

7. To finish creating the signature, click **OK**.

Note The signature that you just created or modified won't appear in the open message; it must be inserted into the message.

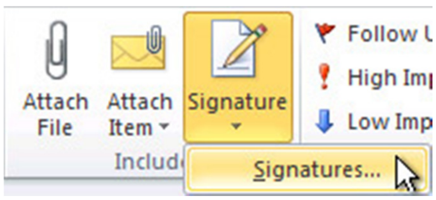
Add a signature to messages

Signatures can be added automatically to all outgoing messages, or you can choose which messages include a signature.

Note Each message can contain only one signature.

Insert a signature automatically

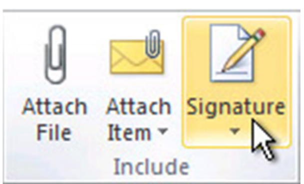
1. On the **Message** tab, in the **Include** group, click **Signature**, and then click **Signatures**.



2. Under **Choose default signature**, in the **E-mail account** list, click an email account with which you want to associate the signature.
3. In the **New messages** list, select the signature that you want to include.
4. If you want a signature to be included when you reply to or forward messages, in the **Replies/forwards** list, select the signature. Otherwise, click **(none)**.

Insert a signature manually

- In a new message, on the **Message** tab, in the **Include** group, click **Signature**, and then click the signature that you want.



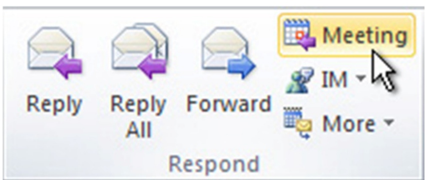
Tip To remove a signature from an open message, select the signature in the message body, and then press DELETE.

Respond to an email message with a meeting request

When you receive an email message or a task request, you can create a meeting request as a response with one click.

The meeting request invites everyone who is on the **To** line in the original message as **Required Attendees**, and everyone on the **Cc** line as **Optional Attendees**.

1. Do one of the following:
   - In the message list, click the message, and then on the **Home** tab, in the **Respond** group, click **Meeting**.
   - In an open message, on the **Message** tab, in the **Respond** group, click **Meeting.**



2. Enter the location and start and end times as you do in any meeting request. You can also add or remove attendees, use **Scheduling Assistant** to find the best meeting time, or add attachments.

The header and body of the original message are included in the body of the meeting request.

Conversations and Reply with Meeting

If your message list is arranged by conversation, the meeting request created with **Meeting** is associated with the same conversation as the original message. The meeting request appears in the expanded conversation.

When you click **Meeting** on a conversation that is not expanded and contains multiple branches, the meeting request applies to the most recent message in the selected branch.

The **Meeting** command is not available when you click a conversation header.

1. Open a PDF file using Fox it.
2. Clicks on Tools
3. Click on Typewriter tools
4. Click on the second Typerwriter Tool that appears
5. Use the mouse to click on the spot where you would like to type
6. Type

Note: If you use the free version all documents will have a stamp on the top right indicating that you used Fox it free.