



MCS Exchange

Template forms in Outlook 2007

Document Description: This document explains the creation of a template form for regular email use (e.g.: a status report format).

For user by: All staff on the Exchange email server using Outlook 2007.

Quick Start:

Creating an Outlook Template (.oft file):

- 1) Create a **New Email message**
- 2) **Type contents** of the template **in the message area**
- 3) From the message **File** menu, select **Save As...**
- 4) Type in a **File name:** for the template
- 5) From the **Save as type:** drop down menu, select **Outlook Template**

Using an Outlook Template (.oft file):

- 1) From the **File** menu, select **New**
- 2) Select the **Choose Form...** option
- 3) From the **Look In:** drop down menu, select **User Templates in File System**
- 4) **Select the template** to use

Click the **Open** button



1. Background

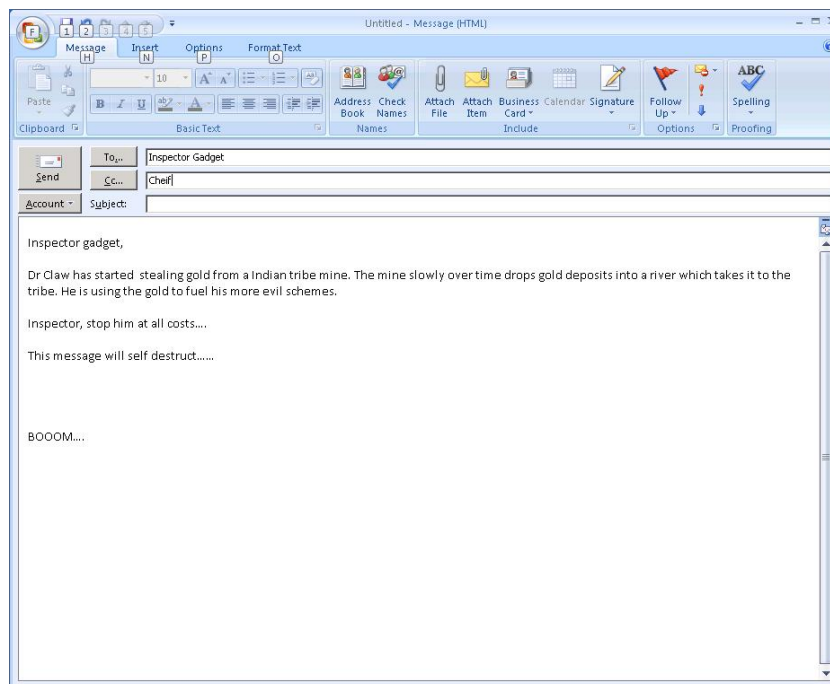
This document has been produced to guide you through the process of utilising Templates in Outlook 2007. As in Microsoft Word, templates allow you to save a regularly typed message or letter so that you don't have to recreate it each time. In Outlook, Templates are also referred to as Forms.

These instructions comprise four sections; the first part covers how to create a template and then retrieve it.

2. Creating an Outlook Template / Form

2.1. Click **N**ew Mail Message to create a blank message to use as the template.

Type in your message details as normal which will form the content of the template.





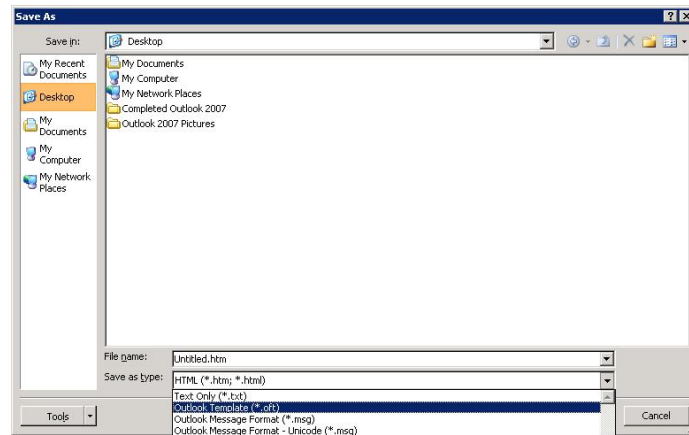
2.2. Saving the template:

2.2.1. From the **Office Button** menu, select **Save As...**

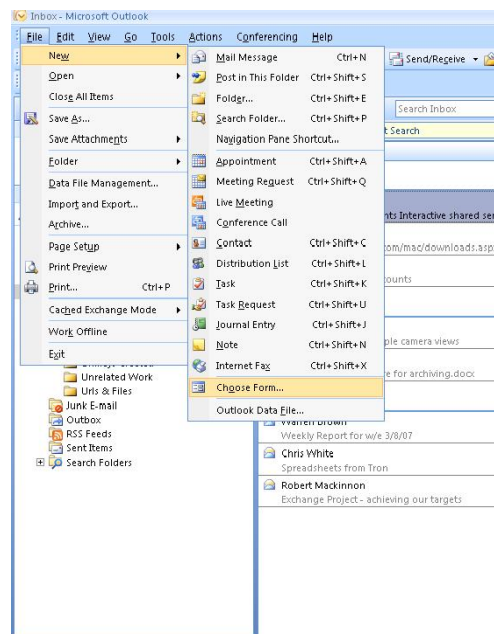
2.2.2. **Type** in a **File name**: for the template.

2.2.3. From the **Save as type**: drop down menu, select the option **Outlook Template**

2.2.4. Click the **Save** button.



2.3. From the **File** menu, select **New**, then **Choose Form...**





2.4. Sub Heading From the **Look In:** drop-down menu select **User Templates in File System**

Select the template you wish to use and click the **Open** button.

Your template will then be presented as a new mail message with your predetermined text already typed in.

