Introduction to Microsoft Outlook 2007

Starting Outlook 2007

In this Microsoft Outlook 2007 tutorial, we’ll discuss a number of the basic procedures used in creating, editing, sending and receiving Outlook 2007 mail messages. In addition, we’ll also introduce other features essential to managing Outlook 2007 mail messages.

Inbox

When Outlook 2007 appears, you will be in the Inbox where the mail you receive is located. Your Inbox screen should look similar to the image at the top of the next page.

The mail messages that you receive will be listed in chronological order.

Different Views in Outlook 2007

Navigation Pane

When you first open Outlook 2007 your screen will normally look like the image above. As indicated earlier, this is much different than previous versions of Outlook. We’ll start with the left side of the screen and work to the right. On left side of the screen you’ll see an image similar to the one on the right. This is called the Navigation Pane. You’ll notice in the top area that it indicates Mail. Below Mail there is an area called Mail Folders. We’ll show you how to change things around in these areas.
Below the Mail area you’ll see a series of Buttons: Mail, Calendar, Contacts, Tasks and Notes. These are called Views. Notice that the Mail button is in orange. This means that this button has been selected (when you opened Outlook Mail).

If you click the left mouse button on Calendar, the Calendar will appear on the right side of the screen and the Calendar button will turn orange. The same thing will happen when you click-on Contacts, Tasks and Notes.

You can customize the Navigation Pane to your liking. Click the small yellow folder, an arrow and a down arrow on the Navigation Pane. When you move your cursor over the down arrow, your screen will look like the image on the above right. Click the down arrow called Configure button.

When you click the Configure button, a drop down menu will appear to the right of the Task Pane. Your choices are: Show More Buttons, Show Fewer Buttons, Navigation Pane Options, and Add or Remove Buttons.

If you don’t want as many buttons to appear, click-on Show Fewer Buttons. Watch what happens. You’ll notice your buttons “leave” from the bottom of the Navigation Pane. You’ll have to click-on the down arrow each time you desire to open this menu again. To add, or bring the buttons back to the Navigation Pane, click-on Show More Buttons.

Now we’ll see what occurs when we click-on Navigation Pane Options… Click-on Navigation Pane Options and the Navigation Pane Options menu screen will appear (image at top of next page).
There are a number of choices with this screen. Notice that there are little green “check marks” in some of the boxes. These are the buttons that currently appear in your Navigation Pane. If you don’t want a box to appear, click the check mark - and it will disappear – and the box won’t show.

If you want to change the order of the buttons, notice the **Move Down** and **Move Up** choices on the right side of this menu screen. If you click-on one of the buttons (like Mail above –which is blue), and click the **Move Down** button, you will see Mail move down your button list.

Give both of these options a try and set your buttons as you desire. Most folks who use the **Show Fewer Buttons** and **Navigation Pane Options** like the **Navigation Pane Options** better, as it allows you to set your buttons just like you wish.

The last option in the Configure Button list is **Add or Remove Buttons**. Click on the **Add or Remove Buttons** choice. You will see a pop-up menu appear to the right of the choice. Here again, you can click on a button (like Mail) and it will disappear, or appear when you click. This is called “toggling.” It’s like a light switch – On or Off. Each time you click, the button appears or disappears.

You have a lot of choices on how to show/add, hide/remove buttons from your Navigation Pane. You choose the method you like best from the ones we have just shown you.

**Different Views in Outlook 2007**

**Mail Views**

You will notice that you can see a small portion of your incoming e-mail in the middle portion of the screen and a greater portion in the right side area of the screen. This is the default view – depending on how you set up your Outlook 2007. There are several different “ways” to set-up a “view” that you like best. The image you see at the top of Page 2 on this tutorial is the one that someone at Microsoft thought you’d like best. It is a combination of two things - **Preview Pane** (the name for the middle portion of the screen), and Reading Pane (the name for the right side of your screen). The second page of this tutorial shows this Preview Pane and Right Side Reading Pane. Most users like this a lot – this seem to be the most popular view – that’s why it’s the default. However, many prefer to view each e-mail message, individually, without the Preview Pane, Reading Pane or anything else.
We’ll show you how to set several different views and you can choose the one you like best. Outlook 2007 has various combinations of Auto Preview and Reading Pane.

First, we’ll work with the Reading Pane. To view the Reading Pane selections, click-on View in the Menu Bar and then click Reading Pane. You will see three suggestions to the right of Reading Pane – **Right**, **Bottom**, and **Off**. Normally, Right is the default. The choice for your Outlook mail will be highlighted a bit – you can see in our image (below) that Right has a little square around it.

We’ll start with **Right**. Click the View Tab at the top of the Outlook Screen. You will see a drop down menu like the image on the right appears. Move your cursor over the Reading Pane selection. If **Right** is not the current choice, click **Right**. You will see the text of a message displayed on the right side of your screen like the image at the top of the next page.

Now we’ll repeat what we did on the last page, but place the reading page on the **Bottom**.
For the last choice, repeat what you did on the last two pages, but choose **Off**.

---

**All of your messages on one screen – NO Reading Pane**
You choose the Reading Pane view that you like the best.

Next, we’ll work with the **Auto Preview**. To do this you’ll need to click-on **View** in the **Menu Bar**. When the drop down menu appears you’ll see a selection called **Auto Preview**. This is called a “toggle” button as it can either be “on” or “off.” Click-on the **Auto Preview** button. When you do, Auto Preview will appear or disappear from your screen.

The image below has **Auto Preview on** the left and **Reading Pane on the right**. You can see a few lines of the message in “**Auto Preview,”** below the incoming message data.

The below image has **Auto Preview on** the top and **Reading Pane below the message**. You can see a few lines of the message in “**Auto Preview,”** below the incoming message data.
The below image has **Auto Preview ONLY – no Reading pane.** You can see a few lines of the message in “Auto Preview,” below the incoming message data.

![Auto Preview](Image)

As you can see, there are a great number of combinations for reviewing your messages using the Reading Pane and Auto Preview together. Experiment and choose the combination you like the best.

**Reviewing messages in the Inbox**

To view a message, simply **double-click quickly** on the message.

![Inbox](Image)

You could also **click-once** on a **message** and then **click File** (in the **Menu bar**), then **click Open**, and then **click Selected Items**.

You will now see a screen similar to the one below.

![Inbox Message](Image)

Thank you for submitting your VSTE Annual Conference Registration. Please note that your registration is not final until we process your payment(s) for the amount(s) due below.
The previous screenshot is designed to review and respond to mail messages received.

**Outlook 2007** uses the Tabs/Ribbons of 2007 Office when you are viewing messages and responding to them. The 2007 Message Tab/Ribbon is enlarged below.

If this is the first time that you are looking at this Outlook screen, it would be a good idea to move your cursor over each item in the Message Tab/Ribbon. As you move your cursor over an item, you will see a Help Text box appear – like the image on the right.

**Microsoft Office Button**

The Microsoft Office Button has replaced File in the Menu Bar. In the upper left corner of your Outlook 2007 screen you will see a button similar to the image on the right. This is the **Microsoft Office Button**.

Move your cursor over the Microsoft Office Button and an Office Button Help screen will appear.
Click the **Microsoft Office Button**.

You will now see the Outlook 2007 Microsoft Office Button selections.

**Notice that many of the “old” File-Menu Bar choices are included in this menu.**

When we move our cursor over Print an expanded menu of **Preview and Print choices** appear on the right.

In the lower right corner of the **Microsoft Office Button menu screen** you will see an **Editor Options** button.

Click the **Editor Options button**.

The Editor Options Menu Screen (below will appear). Take a few minutes and click the choices on the left side of the screen – Popular, Display, Proofing, Advanced and Customize.

Some of these may be too advanced for you now, but you’ll know where they are as you become more accomplished with Outlook Mail 2007.
Replying to a message

Look at the button bar at the top left of the screen (it will look like the image on the right). Notice that you can click-on Reply, and, **automatically reply** to the person who sent the message or **Reply to All** (everyone included in the To: or Cc:). When you click-on Reply and **Reply to All**, you will notice that Outlook 2007 “**automatically**” **completes** the To: and/or Cc: in your outgoing message.

You then click-in the “**white**” message area below the To, Cc, Bcc and Subject, and add your reply/comments to the original message to which you are replying.

After you have made any comments, you can click-on the small “**Send**” button and your Reply will be “mailed.”

Forwarding a message

If you want to forward a message to someone, click-on the **Forward button** (next to the Reply and Reply to All buttons), then click-in the **To:** or **Cc:** areas. We will be covering Address Books later in this “tutorial.” At this point, type-in the e-mail address or addresses of those to whom you want to forward the mail message. If you have more than one address, separate them with a semi-colon (;). You can move down to the Address Book section if you desire.

Envelopes

Now that you have the “feel” for looking at messages in your Inbox, replying to and forwarding them, please take a moment to look at the “little envelopes” next to each message. When a message first arrives in your Inbox, and has not been read, you’ll notice that the envelope is closed.
Once you have read the message, but not replied, the envelope will appear opened.

When you reply to or forward a message in Outlook 2007, you will notice, when you view the message again in **Inbox**, or **Sent Items**, it will now have a small arrow attached to the message. These arrows indicate that the message has been forwarded or replied to. A purple arrow pointing to the left indicates you have replied to a message, a blue arrow pointing to the right indicates that you forwarded that message. The arrows will be the same as on the Reply, Reply to All, and Forward buttons.

**Deleting unwanted messages**

![Image of Outlook interface showing the delete button](image)

If you do not want to keep the message, you can **click**-on the “X” button, in the **button bar**, to send the message to a **Delete folder**.

Note: This is NOT the “x” button in the upper right corner of the screen. If you do click-on the upper right corner X, it will simply close the message and return you to the Inbox, etc.

We’ll discuss this in more detail later in **Folders**. When you delete a message in the **Inbox**, it is sent to the **Deleted Items** folder to be “really deleted” or “recovered” later.

**Moving from message to message in the Inbox**

Notice the **blue** Up and **Down** arrows in the **Quick Access Toolbar** at the top left of the Outlook 2007 screen. **They are only visible when you are “in a message.”** These allow you to move forward and backward (Previous Item and Next Item) between messages in the **Inbox**. Click-on these arrows to see how they work.

**Printing a message**

If you want a “**printed copy**” of the message you can **click**-on the **Printer** in the **Quick Access Toolbar**.
A Print Menu Screen will appear where you can select the printer on which you would like to print your message and the number of copies.

Creating and sending a new e-mail message

If you are in the Inbox and desire to send a new e-mail message to a person or group of persons click-on the New Mail Message button in the button bar.

If you are in some other part of Outlook 2007 and do not see the New Mail Message button, you can always (in the Inbox as well) click-on File in the Menu Bar, then click-on New, and then click-on Mail Message.

In both cases, the below screen should appear.
First, **click**-in the **area** to the **right** of **To**: (see **arrow** at the **bottom** of the **last page**). For now, **type-in** the **e-mail address** of the person, or persons, to whom you desire to send this e-mail message. Next, **click**-in the area to the **right** of **Cc**.: Again, **type-in** the **name or names** of others whom you would like to receive copies of this message. If you type-in **more than one** e-mail address, **separate the addresses with a semi-colon (;}.

Now **click**-in the area to the **right** of **Subject;**, and **type-in** a **subject** for your e-mail.

**This is really important as many SPAM blocking programs automatically reject messages that do not have a subject.**

Finally, **click**-in the **white area below** **Subject;**, and **type-in** your **e-mail message** as you would any memo to someone. You may move around, edit and change your message just like you would do if you were in a word processor. Later in this “tutorial,” we will show you how you may use Microsoft Word as your “e-mail editor,” with all the Microsoft Word features, if you choose to do so.

Your screen should now look similar to the image on the right.

When you have completed your e-mail message, **click**-on the **Send** button in the **upper left corner** of the screen.

**Quick note on folders**

This is simply a **quick note** to tell you what happens when you **send** an e-mail message. When a message is **sent**, a **copy** of your e-mail is **automatically placed in your Sent Items folder**. So, you can **access** your sent message (by **clicking**-on the **Sent Items** folder – then opening your message), edit it, and forward it, etc., until you decide to delete it later on. If you desire to **keep** the e-mail you will be able to **move it to another** folder if you desire. We’ll go into detail on all of this later. For now, just be aware that **you have not “lost” your message**. **You do not need to “copy yourself” in Outlook unless you want to get an additional copy of your e-mail in your Inbox.**
Address Books

When you click on Reply, Reply to All, or Forward or create a new e-mail message, you will see a screen similar to the one below:

If you are Replying or Replying to All on an e-mail message in your Inbox, then the addresses from that e-mail will automatically appear in the To, Cc and Bcc areas. If you don’t want to send the e-mail to some of these addresses, you can simply click-on them and tap the Delete key. If you are Forwarding a message from the Inbox or Sending a new e-mail message, then you can either type-in the address in the To, Cc or Bcc areas, or use the Global Address List or Contacts Address Book.

There are several Address Books in Outlook 2007 that you can utilize to send and respond to e-mail messages. In addition, there are a number of options for entering e-mail addresses into an Address Book. You will, in all probability, use two address books: Global Address List and Contacts Address Book.

To access these address books/lists click-on the To: or Cc: “buttons” (see arrows on the picture above). The Global Address List menu box will appear.
Global Address List

We’ll look at several Address Lists and explain how each is utilized. Let’s look at the Global Address List. When you click-on either the To:, Cc: or Bcc: buttons the below Select names: Global Address List screen will appear:

When you are in the Reply, Reply to All, Forward or create a New e-mail message screen, and need to add additional e-mail addresses, you can still type-in the addresses or use a Global Address List like the one above.

The Global Addresses List that you see above is created, and updated, when a person at the institution/business selects to use Outlook mail. The Information Technology Staff places the new user in the Global Address List. Thus, this address list is a current list of all Outlook mail users (and it may also include other users who are not on Outlook – depending on your on campus/business).

To use this list, simply click-on the person whom you want to receive the e-mail (their name will “turn blue” – see arrows above). Or, you can type their name in the area below “Search-Name only,” and you will notice that the list of names, below where you typed the name, moves to all of the persons with that name. Most systems are in last name order. Some are in first name order. By looking at the name list you can determine how your system is setup. Then, click-on the To, Cc or Bcc (Blind copy) buttons. This will add the address to those already in the e-mail (you will see it appear in the area to the right). You can do this for as many addresses as you desire. When you have finished, click-on OK, and you return to your message. The arrows in the image above point to each of these items.
Contacts

How can you create your own **automatic** address list for someone who is not on the campus/business Outlook 2007 mail system (especially off campus/business addresses)? There is a feature called Contacts to take care of this. A contact is just what it indicates. You create your own Contacts (like a personal address book). First we’ll show you how to get to Contacts and then how to add and delete addresses.

When you click-on the To:, Cc: or Bcc: buttons (Page 16) the Select Names Global Address List appears. In the upper right corner of this menu screen, under Address Book, you will see an area that indicates that this is the Global Address List. To the right of the title is a small down arrow, click-on the down arrow and a menu screen similar to the one at the right appears.

Now, click-on Contacts, and the screen below appears, which contains the addresses that YOU have already placed in your old Personal Address Book – if you had one.

Notice, the Select Names: Contacts menu screen (left image) now indicates Contacts in the upper right corner. Also, notice the e-mail addresses on the menu screen. These are e-mail addresses that you would add to your Contacts list.
To add the addresses in Contacts, to an e-mail message, simply repeat the procedure outlined in the Global Address List. Click-on the name, to whom you desire send the e-mail (on the left side), then click-on the To:, Cc: or Bcc: buttons to add that name to these areas. Again, you can add as many names as you wish. When you have finished, click OK and you will be taken back to the e-mail that you want to send. You can then continue to creating a new e-mail or editing the contents of one that you are working with.

**Adding Names to Contacts**

There are many ways to add names to Contacts. We’ll show you several of the more popular procedures. You will also discover other methods, as you become more familiar with Outlook 2007.

**Adding names as you type the e-mail addresses in the To or Cc areas of the message**

If a person’s e-mail address is not currently in your Global Address List or Contacts, you can add it while you are in the process of sending them a message. In the area to the right of To… or Cc, **TYPE-IN** the e-mail address for the person or persons you wish to receive your e-mail. If you type-in several addresses, separate them with a semi-colon (;). Click away (somewhere else on the screen) from the address you typed. You will notice that, in a few moments, the addresses will become **underlined**.

To add an address to your Contacts, simply **RIGHT-CLICK** on a name, that you typed, and a **menu box** will appear (image at left).

Click-on **Add to Outlook Contacts** and the **Contacts entry menu screen** will appear (image at top of next page).
The Contact entry menu screen appears below.

```
<table>
<thead>
<tr>
<th>Full Name:</th>
<th>Bonzo Brown</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company:</td>
<td></td>
</tr>
<tr>
<td>Job Title:</td>
<td></td>
</tr>
<tr>
<td>File as:</td>
<td>Brown, Bonzo</td>
</tr>
</tbody>
</table>

Internet

<table>
<thead>
<tr>
<th>E-mail:</th>
<th><a href="mailto:bonzo@msn.com">bonzo@msn.com</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>Display as:</td>
<td><a href="mailto:Bonzo@msn.com">Bonzo@msn.com</a></td>
</tr>
<tr>
<td>Web page address:</td>
<td></td>
</tr>
<tr>
<td>IM address:</td>
<td></td>
</tr>
</tbody>
</table>

Phone numbers

<table>
<thead>
<tr>
<th>Business:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Home:</td>
<td></td>
</tr>
<tr>
<td>Business Fax:</td>
<td></td>
</tr>
<tr>
<td>Mobile:</td>
<td></td>
</tr>
</tbody>
</table>

Addresses

| This is the mailing address: |             |

 normally, the first part of the e-mail address you entered before the “@” symbol will appear in the full name box. To change this to a logical full name click-on the Full Name... button (as indicated by the arrow above).

When the Check Full Name box appears (image on left) you can then fill in the entire name by filling in the appropriate areas (First:, Middle:, Last:, etc.)

When you are finished, click-on OK.

You can now fill in the applicable areas for the person’s mailing address, if you desire. To do this click-on the Address down triangle (see arrow at right). Click-on Business, Home or Other.
You will notice that your Address area changes to your selection (we chose Home…). After you make your selection (Business, Home, Other), type the address in the small box to the right of your selection.

When you have completed everything, you can click-on the Save and Close button.

You will now return to your message. To add additional names to your Contacts Address Book repeat the above process again.

When you are in the Contact screen (at the top of the last page) – notice that there are a lot of other tabs and areas which you may also use to enter information about a person.

To observe that the contact you entered has been added to your Contacts, click-on either the To, Cc or Bcc buttons in your message screen. When you have clicked one of the buttons, you will go to the Global Address List screen again. Click-on the down arrow in the upper right corner, and move down the menu and click-on Contacts (Page 18). You will see the address you added. When you have a lot of addresses, you will have to use the up and down elevator bar to view your addresses. Outlook automatically alphabetizes the names as you enter them.

Your Contacts screen should look something like this:
Adding Names to your Contacts as you receive e-mail in your Inbox

Note: Right-clicking on an e-mail address also works when you receive a message from someone! If you know that an address is not in your Contacts, RIGHT-CLICK ON THE ADDRESS AND ADDS it as you did above. This really saves a lot of time. You know it’s a good address, because you received their message!

To the left is an image of the address area of an e-mail in the Inbox. We simply RIGHT clicked-on the person and then moved down the pop-up menu to Add to Outlook Contacts – just like we did when we typed-in and address in our New Mail To: area.

Once you have clicked-on Add to Contacts you will go back to the same process that is outlined above on pages 20 and 21.

Manually adding e-mail address to your Contacts

Many times, friends will write you (the old fashioned way) or call you on the phone and furnish their e-mail address. So, there is still another way to add their e-mail address to your Contacts. In the button bar, below the Menu bar, you will notice a “small book” (like the one on the right). When you run your cursor over the book it will indicate: Address Book. You can click-on it and add names to your Contacts. Click-on the “book” and the following screen will appear.

Click-on File in the Menu Bar and then click on New Entry.

A New Entry screen will appear.

It should look similar to the image on the right. Make sure that New Contact is highlighted in blue in the Select the entry type: in the top portion of the screen.

And, also make sure that Contacts is selected in the Put this entry area in the lower part of the menu screen. If Contacts is not the choice, click the down arrow on the right side of Put this entry and select Contacts from the choices that appear.
When everything looks like the screen above, click the OK button.

An *Untitled – Contact* screen like the one below will appear.

Notice that the *Untitled – Contact* screen is similar to the one you used to enter e-mail addresses as you typed them into messages, or used when you copied addresses from your Inbox again appears – with a notable exception – there is no name in Full Name… or E-mail address in E-mail.

So, fill in the name of the person in Full Name… and enter their e-mail address in the E-mail area. You can enter other information as you did previously, as you desire.

When you have entered the information, your screen should look similar to the image on the left. When you have entered the information you desire, in the appropriate areas, click Save and Close to add this person to your Contacts list.
Note on viewing e-mail addresses

Once you begin using Outlook 2007 Mail you can check on a person’s “information” by right-clicking the mouse on their name in the To, Cc or Bcc areas. In the pop-up menu that appears, click on Properties. If they are in your Global Address Book you will “see” how the system administrator entered the information. If they are in your Contacts list, you will see the Contacts screen similar to the one on the last page. This is very handy if you desire “quick” information about a person in your system.

Personal Distribution Lists

Now that you have an idea of how to add individual names to Contacts, and are familiar with the Global Address List, you may want to create a group of addresses to which you frequently send e-mail. In Outlook 2007 this is called a Personal Distribution List. To create a Distribution List, you will follow several steps, similar to those above.

To create a Personal Distribution List you will need to be in the Inbox, Sent Items, or Deleted Items (you can be in other main screens when you are more familiar with Outlook 2007). You will need to be in a main screen where you can see the little Address Book button, click-on it.

Click-on File in the Menu Bar and then click on New Entry.

A New Entry screen will appear.

When the New Entry screen appears, click-on New Distribution List in the area below Select the entry type.

Make sure that Put this entry is set on Contacts. If it is not set on Contacts, click-on the small down arrow to the right of this area and select Contacts.

Then, click-on OK.
The following Untitled – Distribution List menu screen will now appear:

In the **area to the right of Name:** type in a name for your Distribution List (e.g. Lunch Bunch).

Next, click the Select Members button.

The **Select Members: Global Address List** menu screen will appear.

Notice that this screen looks almost like the Select Names screen you used to address your messages. You’ll notice that the Select Members screen only has a **Members ->** button. So, you can, at this moment, only add persons, you desire to be in your Distribution List, to the group. Later we’ll show you how to remove and add members as you update your list.
By using either the Global Address List, or your Contacts you can create your Distribution list. Click-on the small down arrow in the upper right corner of the Select Members screen and select the group you want.

In the example on the right we chose our Contacts group, and selected the person you see at the bottom of the Menu screen.

Then click-on the Members-&gt; button – this person was added to our Distribution list on the right. You may “switch between” the various “lists” as often as you like, and add as many names as you like.

**Note:** You do not need to have someone in either the Global Address List, Contacts or another list to have them in your Distribution List. If they are in neither, simply type a semi-colon (;) at the end of the last address on the right side, and then type-in the person’s e-mail address. They will be included in your list.

When you have added all the names you desire, click-on OK.

You should now return to the Distribution List screen. Your screen should look similar to the one below. You’ll see the name of your Distribution List in the Name: area and the names of the Members in the area below.
To remove members from the list simply click once on the member and then click-on the Remove button. You’ll notice that they are removed from your list.

To add new members, simply repeat the steps on pages 24 to 26. Click-on the Select Members button and add them as you did before.

When you have made all the changes you desire, click-on the **Save and Close** button in the screen above.

The next time you “visit” Contacts, your screen will look something like the one on the right.

The name will be in bold, and there will be a “teeny” icon of a woman and a man on the left.

Any time you desire to make changes to this Distribution List, just **double-click quickly** on a list and you’ll be taken to that Distribution List screen that you used to create the list.
Sending Messages using your Distribution List

To send a message to everyone on your Distribution Lists, use the same steps that you used for sending a message to a single person. Either type in the name of the Distribution List in the To:, Cc:, or Bcc: areas of your message (e.g. Lunch Bunch), or use the Select Names box, like you did on pages 16 to 18, but select your Distribution List like you would select a name.

Folders

When you first opened Outlook 2007, the area to the left of the screen looked something like the image to the left. The icons you see take you to different features of Outlook (Calendar, etc.) or contain e-mail.

The icons we are concerned with in this tutorial are the ones that pertain to e-mail and hold messages (e.g. Inbox, Sent Items, Deleted Items).

Creating Sub-Folders

To create a Sub-Folder, do the following:
Click-on File in the Menu Bar, then click-on New in the drop down menu, and then click-on Folder…

The following Create New Folder screen will appear:
Select a **logical name** for the folder. For this tutorial we’ll use the title “**My Junk.**” Type the name you desire in the **Name:** area.

Next, Click the Inbox folder then Click-on **OK**.

This will place the created folder under your Inbox.

Note: Folders created in Lotus Notes will appear as sub-folders under your Inbox. Public Folders are **NOT** for **PUBLIC USE**. The server will delete any files stored in this folder.

Notice that a new Folder (**My Junk**) has been added as a sub-folder under your Inbox folder.

**Placing e-mail messages in your Folders**

**Moving a single message**

To “move” a single e-mail message from one folder (Inbox, etc.) to another folder (Personal Folder), you simply click-on the e-mail message, you want to move, hold down the left mouse button, and drag the message to the **My Junk Folder**.

In the image above, we clicked-on the highlighted message, held down the left mouse button, and dragged the message from the Inbox to the My Junk folder. You will notice, as you are “dragging” your e-mail message, a small box appears “attached” to the cursor arrow. The cursor changes to a circle with a line through it (when you are over an area...
where you can’t drop your message), and then changes again to the box with the arrow when you have the cursor over a Folder icon. When you have the box symbol over your My Junk Folder, release the left mouse button. This will move the message from one folder to another. Try this with one of the messages in your Inbox.

**Moving Several Messages**

When you are ready to move the group of messages you highlighted, simply click-on any of the highlighted messages, and immediately hold down the left mouse button, and then drag all the messages to the folder where you want the messages. If you click-on one of the messages and don’t drag the cursor immediately, it will “turn-off” the multiple message selections and you’ll have to start again. It’s kind of tricky. So the first time that you try this, if it doesn’t work – try again.

If you ever desire to “turn-off” the multiple highlights, you simply click-on any message and that will remove the highlights and select the message on which you clicked.

You can still delete the messages when you no longer desire to retain them.

**Moving, Deleting, and Recovering Mail Messages**

You should now have a “feel” for Outlook 2007. Having just completed folders, you can see that we can move a message from any folder to any folder simply by clicking-on it and dragging the message to another folder. You could also click-on a message and, either using **Edit** (in the Menu Bar), then **Copy** or **Cut** in the Menu bar, and then **Paste**, to move or copy a message in this manner. You can also use the **Cut, Copy** and **Paste buttons** in the button bar.
To delete a message, you have already learned that you can click-on the message and then on the “X” in the button bar (not the X in the upper right hand corner). If you click-on the upper right hand corner X this will simply close the message and return you to the Inbox, etc. When you delete an e-mail message in your Inbox, Sent Items, or a Personal Folder, this places the message in the Deleted Items “trash can.” You can “drag” an item from Deleted Items to any folder to retrieve it, or use the methods above to recover a message to a folder.

“Really” Deleting Messages

To “really” delete an e-mail message in the Deleted Items Folder, you can click-on the message and click-on the “X” button, or tap the Delete key. Outlook 2007 will ask you if you “really” want to delete the message. When you say “yes,” it’s gone. To delete several individual messages at once, click-on the first message, then hold down the Ctrl key, and while holding down Ctrl, click-on the other items. You will see that they turn “blue,” indicating that you are “marking” them (just like we covered before). Now click the “X” button or tap the Delete key. If you want to delete ALL of the items in the Delete Items trash can, click-on Edit in the Menu bar and then Select All. Then, click-on the “X” button or tap the Delete key.

A message box may or may not appear depending on how you setup Outlook asking if you really want to delete all the items. If you do, click-on Yes.

Adding, Sending, Receiving, Viewing, and Saving Attachments

There are many times when you want to send a Word document, Excel spreadsheet, PowerPoint presentation, picture, or file of some type to someone, or be able to receive one. Outlook 2007 makes this relatively simple. The items indicated above are sent as “attachments” to your e-mail.

When you are sending an e-mail message and want to “include” an attachment it’s relatively easy. When you are in the Untitled-Message, the Forward or Reply screens, you will notice a “paperclip” Attach File in the Message Tab/Ribbon.
This paperclip (Attach File) is the button that allows you to insert an attachment in your e-mail message. **Click-on the paperclip.** The following Insert File menu screen will appear.
When this Insert File screen appears, choose the location of your file (attachment) on your computer (A or C drives, etc., or on a network drive) by using the Look in: area (see the arrow above – we have chosen My Documents on the C: disk drive). Then choose the file by clicking-on it (we chose a PowerPoint file called How to make a great PBJ for our attachment). Click-on Insert. Your e-mail message, with attachment, will look similar to the image on the right.

When you or, another person, receives this attachment, all you/they have to do is double-click on the attachment and it will load into the proper program! Or, you can right click on the attachment, and a menu will appear that you can use. Once you have the document in its normal “environment,” you can save it, etc. Pretty neat!

**Out of Office Assistant**

If you are going to be away from your office computer for a period of time, and you want to leave a courtesy message for folks to let them know that you’ll be away, you can use the Out of Office Assistant to do this. To activate the Out of Office Assistant click-on Tools in the Menu bar and then click-on Out of Office Assistant…

You will need to be in the Inbox, Sent Items, Deleted Items or one of your folder screens to do this.
The **Out of Office Assistant menu screen** will just like the screen shot below.

![Out of Office Assistant menu screen](image)

Click-On **Send Out of Office auto-replies**. You can also select the **Only Send during this time range** check box to schedule when your out of office replies are active. If you do not specify a start and end time, auto-replies will be sent until you click **Do not send Out of Office auto-replies**.

On the **Inside My Organization** tab, type the response that you want to send while you’re out of the office.

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.

Note: Organization is usually defined as your company and includes people who have an Exchange Server account on your e-mail system.

**Auto-Signature**

There is an Outlook 2007 feature, which allows you to place a “**designed**” **signature** at the end of your e-mail messages. *You will need to be in one of the Main areas of Outlook 2007 to create a signature (Inbox, Sent Items, Deleted Items, etc.)*.

To activate this feature, **click-on Tools** in the **Menu Bar**. When the drop down menu appears, **click-on Options**.
When the above screen appears click-on the Mail Format “Tab” (see top arrow above). In the lower portion of the Options menu screen you will see an area called Signatures. Click-on the Signatures… button in this area (see lower arrow above).

The following Create Signature menu screen will appear.

Click-on the New button in this screen.

The Create New Signature menu screen at the top of the next page will appear.
When the **New Signature** menu screen appears, type a **name** for your signature in the area **under Type a name for this signature**:  

Then, **click**-on the **OK** Button.

You can type anything you desire for your signature (**in the Edit signature area**). You can type just your name, or name, title, phone, FAX, etc. It’s your signature.

**Notice** that there are **several buttons below the Edit signature text** – Font, Font Size, Bold, Italics, Underline, Color, etc. If you **desire to change the font** of your signature, **highlight the text** that you **desire to change**, and then **click**-on the Font button and select your font – then **click OK** in the Font menu screen. You can have several different fonts in your signature if you desire – as well as color.

When you have the signature you desire, **click the OK button**. This will **take you back** to the Options menu screen. **Click OK** again.
From now on, when you create a new message, reply to one, or forward one, you will see that your signature is automatically added at the end of the message.

If you desire to edit your signature, or create a new one, follow the process above, and choose the logical buttons to Edit, Remove, or create a New signature.

When you are satisfied with your signature, click OK.

**Accessing the Outlook 2007 Calendar**

You should be “in” Outlook Mail 2007. On the left side of your screen, there is a long column called the Navigation Pane.

Look at the bottom of the Navigation Pane and you will see a Calendar button.

Click the Calendar Button. A Calendar screen, similar to the one below, will appear.
Notice, at the top of the calendar, a small area that looks like the image above. The default for Outlook 2007 is a single day. You can change this to view a 5 day work week, a 7 day week, or a full month.

When you click the 5 Work Week button, an image similar to the one below will appear
When you **click 7 Week**, the **image** at the top of the next page will appear.

When you **click 31 Month**, an **image** similar to the one below will **appear**.
You choose the view that you prefer. For this tutorial we’ll use the 5 Work Week calendar.

**Making an Appointment**

There are several different methods for creating an Appointment in Outlook Calendar 2007.

Probably the quickest way to create an appointment is to go to the calendar day/time for the appointment, and **DOUBLE CLICK QUICKLY** on the Time and Day for the appointment (we are in the 5 Work Week Calendar).

We want to make an **8:00 to 9:00 AM appointment on Monday, 7 May.** So, we **double click quickly** on 8:00 AM (see image on right).

We could also **RIGHT click** on this time and date. A drop down menu with **New Appointment** will appear. Click **New Appointment**.

**Both** of the above methods will open a **Untitled – Appointment** menu screen like the one below.
We’ll now enlarge the top portion of the Untitled – Appointment Menu Screen (below).

Notice that the **date and time we chose** are **indicated** in the **Start time: area** of the screen. We’ll now enter additional information on our meeting in the appropriate areas of this screen.

In the **image above**, we **entered** the information on the person with whom we are meeting in the **Subject: area** (see **top arrow** on left) and then the **place where we are meeting** in the **Location area** (lower **arrow** on left). Once you enter this information, you’ll see the **“name”** of the appointment change to the data you have entered in the **Subject area**. We then clicked the **down pointing arrow to the right of End time** and moved the **time to 9:00 AM** (lower right **arrow**).

**Notice, above** and to the **right of End time**, there is a **Reminder (upper right arrow)**. If you have **speakers** with your computer, and **desire a sound to play** (as a reminder) **before your appointment**, leave this as you see it. To the **right of Reminder** it indicates 1 hour – this is how many hours/minutes before the meeting the reminder will sound. To the **right of 1 hour** is a **down arrow**. If you **click this down arrow**, you can **change the time to any time you desire** (to be reminded of your coming meeting).
On the right side of the Appointment Tab/Ribbon, you’ll see a Categorize button. If you click the Categorize button, a drop down menu will appear with different meeting categories and colors. You can choose a meeting label and color if you desire. We chose “orange” and “Fairly Important” for our meeting.

If you desire to edit the current choices, or create some of your own, simply click the All Categories button and follow the instructions.

Below the Subject/Location/Time/Date area you will see a blank white area. This area is a “text box” where you can type additional information on your appointment if you need to do so. Also notice that when we selected the “orange – Fairly Important” choice that this now appears at the top of our appointment screen.

We’ll be doing Outlook 2007 training using the Microsoft-Lynchburg College tutorial.

Your final appointment screen should look something like the one below. When you have everything the way you want it, click the Save and Close button on the left of the screen.
You will now return to your calendar. Depending on which “day view” you chose, you should see something like the image on the right – we are in 5 Work Week.

If you need to change something on your calendar it is fairly simple. Simply click the left mouse button twice quickly on the appointment, and it will open the Appointment Screen for you to make any changes you desire.

**Recurring Appointments**

Many times you will have a recurring meeting or appointment that repeats throughout the year, or for several months. Outlook Mail Calendar 2007 has a feature that will allow you to schedule recurring meetings and appointments.

Again, there are several ways to access this feature. You can double click quickly on the first recurring meeting time and date and the Appointment screen will appear. Or, you can click on the Actions tab in the Menu Bar and then select either New Recurring Appointment or New Recurring Meeting (they both do the same thing).

If you double click a time/date, you will have to click on the Recurrence button in the Appointment screen Tab/Ribbon.
The **Recurring Meeting/Appointment** is accomplished in **two steps**. First, you have to enter what dates, days, hours, weeks, etc. that you will meet, and then enter the normal appointment data about the meeting. We’ll **start** with the **Appointment Recurrence** menu screen and then finish with the normal Appointment menu screen. Once you click as indicated on the last page both the **Appointment Recurrence** and **Untitled - Appointment** screens will **appear** as shown in the image below.

For this tutorial we’ll use the example of a **meeting** that will be held **twice a week** for the **next several months**. Our meeting will be from **10:00** to **11:00 AM**, **Tuesday’s** and **Thursday’s** from **8 May 2007** through **18 October 2007**. First we’ll complete the **Appointment Recurrence** menu screen. Our screen, when finished, looks like the image on the right.
To complete your Appointment Recurrence screen, click the down arrows to the right of Start and End and select your meeting times, then click in the circle for your Recurrence pattern (Daily, Weekly, Monthly, Yearly). Select the days on which you will meet by clicking in the small check boxes to the left of the days (Sunday, Monday, etc.). Please see the image at the bottom of the last page (Page 8) and the arrows that indicate our selections.

In the lower left portion of the screen, in the Range of recurrence area, click the down arrow to the right of Start and a neat thing will occur—a miniature calendar will let you choose your specific date. Simply click the date you desire and it will appear in the Start area.

If you need to move to another month, the right and left pointing triangles on either side of the Month (August), will move you ahead or back one month.

Repeat this process in the End by area in the lower right area of the screen.

When you have entered all of your data, click the OK button. This will take you to the Untitled – Appointment menu screen. Fill-in your information as you did on Pages 4 to 6 and then click Save and Close. If you need to make changes later, you simply click the Recurrence button and make any changes as outlined above.

Our screen looks like the one below.

![Image of Appointment Recurrence screen]

After we clicked Save & Close, we changed our calendar view to 31 Month, and moved to the month of September 2004. You can now easily see, in the image at the top of the next page, that each of the meetings is schedule for the entire month. If you moved to October, you would see the last meeting occurring on the 18th as entered.
Creating Appointments/Meetings and Inviting Others

Another feature of Outlook Mail Calendar 2007 is the ability to invite others to a meeting you are scheduling. You’ll have to check with your campus/business technology staff to determine if this is feasible. In many places, if the staff does not maintain a personal Outlook calendar, this will not work, as you would not be able to “see” their “busy appointment times.” We’ll go through the process, assuming that the persons selected maintain an Outlook Calendar.

We’ll show you the method we like best. As you become familiar with Outlook Mail Calendar, you may discover a method you like better. Click the Actions tab in the Menu Bar and then click New Meeting Request.
The **Untitled – Meeting menu screen** will appear (similar to the one below). We have already selected several staff members to determine if the day and time we propose is available for them to meet – we’ll show you how we did this. You can see from the image below that we have selected several people for a proposed meeting from 11:00 AM to 12:00 noon on Thursday, 3 May 2007. The blue lines you see below indicate the times that these staff members are currently busy and could not attend a meeting. We used an AutoPick Next button to select the time you see below between the green (Start) and red (End) lines for our meeting. Now we’ll show you how we did this.

![Meeting Menu Screen](image)

In the **Untitled - Meeting menu screen** we clicked the **Add Others button** (see arrow above). When we clicked, the Add from Address Book selection appeared. We clicked on **Add from Address Book**.
When we clicked the **Add from Address Book** button, the **Select Attendees and Resources** menu screen appeared.

In the **Type Name or Select from List** area we typed the name of a person we are inviting to the meeting.

We then clicked on the **Name of that person**.

Next we selected **Required** (as this person is essential to our meeting). We could also have selected **Optional**.

We repeated this selection process for the remainder of the staff we desired to invite.

When we completed our list we clicked the **OK button**.

When we clicked the **OK button** we were returned to the **Untitled – Meeting menu screen** in the **middle of the last page** (Page 11). If you look back at the last page, you will see our four names and blue lines to the right of each name. At the bottom of the Untitled – Meeting screen you will see that the color blue indicates the person is busy on some other appointment or task.

Outlook Calendar 2007 has a nifty button which will assist you in finding “open” times for your group during which you can arrange a meeting. At the **bottom left** of the Untitled – **Meeting menu screen** is the **AutoPick Next >> button**. We clicked this button and a green and red “band” appeared on our calendar and found the first “open” time.

If you agree with this selection, you are ready to complete the scheduling by returning to the Appointment portion of the Untitled – Meeting menu screen. If you are not satisfied with this selection, continue to click the AutoPick button.

You will notice the **AutoPick begins by**
assuming you desire a half hour meeting. You can change this in two different ways. You can place your cursor on the green or red lines (that outline the meeting), hold down the left mouse button and “drag” the line to expand the time. From then on, Outlook Calendar 2007 will assume you desire the longer meeting time selected.

Or, at the bottom of the Untitled – Message screen you can use the Meeting start and end time areas to select a length for your meeting.

When you have everything just as you desire, click the Appointment button at the top of the Untitled – Meeting screen. This will take you to the Untitled – Meeting menu screen where you will describe the meeting (as you did on Pages 4 -6). When you have completed this screen, Outlook Mail, will send an e-mail message to each of the participants asking if they desire to attend the meeting. The completed screen will look similar to the one below.
Once you have **completed everything**, click the **Send button** at the **top** of the Meeting menu screen.

As soon as you click the Send button, each person you invited to the meeting will receive a message asking them to either **Accept** (attend the meeting), **Decline** (unable to make the meeting) or to accept **Tentatively** (maybe can make the meeting). Their incoming message will look similar to the one below.

If they accept your invitation, their Outlook Calendar will automatically post this meeting to the Calendar. If they reject the meeting Outlook Calendar will not post the meeting. If they accept tentatively, outlook calendar will post the meeting with tentative colors. You will receive an Outlook message indicating the response of each person invited to the meeting.

**Allowing other Outlook Mail Users to View your Calendar**

You can allow other Outlook Mail users to view your Outlook Calendar (regardless of the version of Outlook they are using). **Make sure you are in your Calendar.**

If you desire to do this, click the **File tab** in the **Menu bar**, then click **Folder** and then select **Properties for “Calendar”**.

The **Calendar Properties menu screen** at the **top of the next page** will appear.
You should be on the Permissions tab in the Calendar Properties menu screen.

To allow someone to view your calendar, click the Add button.

The Add Users menu screen (which you have used several times before in this tutorial), will appear.

Type in the name of the person you desire to view your calendar in the Search area (top left arrow).

Next, click on the name in the Name area. It will turn blue.

Then click the Add button.

Finally, click the OK button.
The Calendar Properties menu screen will appear (similar to the image on the right).

You will see the name you entered highlighted in blue.

Below the Name you will see a Permissions area. It is in the Permissions area that you allow the person you entered to view as much, or as little of your calendar as you desire. You can see that you can give them very limited or complete access to your calendar. You select the items that you desire (by clicking in the squares and circles).

Then click the OK button.

The person to whom you gave permission to view your calendar may now access your calendar, in their Outlook Mail account, by clicking File in their Menu Bar, then clicking Open and then selecting Other User’s Folder.

They will now see the Open Other User’s Folder menu screen. They can either click the Name button and select your name from the Select Name menu screen (see Outlook 2007 Mail tutorial), or they can type your name in the area to the right of Name...
If they type in the person’s name, the Check Names menu screen will appear. They should click the name they desire (it will turn blue), and click OK.

The person you allowed to view your Calendar will now see your calendar. Their screen should look similar to the one on the right.
Once the above process has been completed, the **next time** the person desires to see your calendar, they will **see a screen with your calendar available** (similar to the **image on the right**). They can now **place a check mark by your name**, and your **Calendar will appear**. To **remove** your calendar from view, they simply **“uncheck”** the box by your name.

**Sharing your Calendar with others**

To share your Calendar with others, in the Navigation Pane, select **Share My Calendar**
The following window will appear:

Enter the name of the person to whom you want to grant access to view your Calendar.

Type a subject for your email message.

Select the Allow Recipient permission to view your Calendar.

You may also select Request Permission to view recipient’s Calendar if desired. This step is optional. The completed Share your Calendar form looks like the window below.

A message box will appear after you select the Send button.

A second message box will appear after you select Yes.
An email message will appear in the invitee’s mailbox similar to the window on the right.

Select the Open button. The invitee’s Outlook 2007 Calendar will display the calendar entry of the invitor as shown below.
Allowing Another Person to Manage Your E-mail and Calendar

Similar to having an assistant help you manage your incoming paper mail you can use Microsoft Outlook 2007 to allow another person, known as a delegate, to receive and respond to meeting requests or responses and to send e-mail messages on your behalf. You can also grant permissions that allow your delegate to read, create, or have full control over items in your Exchange mailbox.

Delegate Access is most commonly used between a manager and his or her assistant, where the assistant (delegate) is responsible for processing the manager’s incoming meeting requests or e-mail messages and coordinating the manager’s schedule. When a delegate has Send on Behalf permissions, the delegate can compose an e-mail message and enter the manager’s name in the From box. Recipients of the e-mail message will see the text Delegate Name on behalf of Manager Name next to From.

Turn on Delegate Access

On the Menu Bar select Tools, Options:
A similar window to the right will open:

Select the Delegates tab:
Select a person from the Global Address List. (Note: the delegate must be a person in the Global Address List. It cannot be a person in your Contacts List who is not listed in the ODU’s Address book.) Select the Add button and then click OK.

The Delegates Permissions dialog box will open. You can accept the default permissions or select custom access levels for the delegate.
To allow your delegate to manage your e-mail, select the following permissions:

![Delegate Permissions: MailTest2](image)

To send a message to notify the delegate of the changed permissions, select the Automatically send a message to delegate summarizing these permissions check box. If you want, select the Delegate can see my private items check box.

Important: Delegate can see my private items check box is a global setting that affects all of your Exchange folders, including all Mail, Contacts, Calendar, Tasks. You cannot allow access to private items in only one folder.
Create e-mail template (Stationary in Notes)

You can create an e-mail template for messages that you always send out like newsletters or monthly accounting update. To do this, click-on new mail message. Type-in all the information in the different fields.

When you’re done typing all the information, click-on the Office Menu and choose Save-As.
Type the name of your template in the **File name**: box

Click on the drop down menu for **Save as type** and choose **Outlook template (*.oft)** and click **Save**.

To start using the new e-mail template, click on **Tools** – **Forms** – **Choose Form**....
The **Choose Form** window appears as shown on the right side. Click-on the down-arrow & choose **User Templates in File System**.

Choose the e-mail template from the list and click-on **Open**.
## Terminology Mapping

<table>
<thead>
<tr>
<th>Names called out in Lotus Notes</th>
<th>Names called out in Outlook 2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Detach attachment</td>
<td>Remove attachment</td>
</tr>
<tr>
<td>Domino Directory</td>
<td>Global Address List (GAL)</td>
</tr>
<tr>
<td>Domino Server</td>
<td>Exchange Server</td>
</tr>
<tr>
<td>Free time</td>
<td>Availability</td>
</tr>
<tr>
<td>Group calendar</td>
<td>Group schedules</td>
</tr>
<tr>
<td>Launch attachment</td>
<td>Open attachment</td>
</tr>
<tr>
<td>Mail Group</td>
<td>Distribution list</td>
</tr>
<tr>
<td>Meeting invitation</td>
<td>Meeting request</td>
</tr>
<tr>
<td>Memo</td>
<td>Mail message</td>
</tr>
<tr>
<td>Name and Address Book</td>
<td>Global Address List (GAL)</td>
</tr>
<tr>
<td>NTF (Note Template File)</td>
<td>NTF (Notes Transition Framework)</td>
</tr>
<tr>
<td>Personal Address Book</td>
<td>Global Address List (GAL)</td>
</tr>
<tr>
<td>Refresh</td>
<td>Send/Receive</td>
</tr>
<tr>
<td>Repeating appointment</td>
<td>Recurring appointment</td>
</tr>
<tr>
<td>Replicated Local Mail File</td>
<td>Cached Exchange Mode</td>
</tr>
<tr>
<td>Return receipt</td>
<td>Read receipt</td>
</tr>
<tr>
<td>Trash folder</td>
<td>Deleted items</td>
</tr>
</tbody>
</table>