

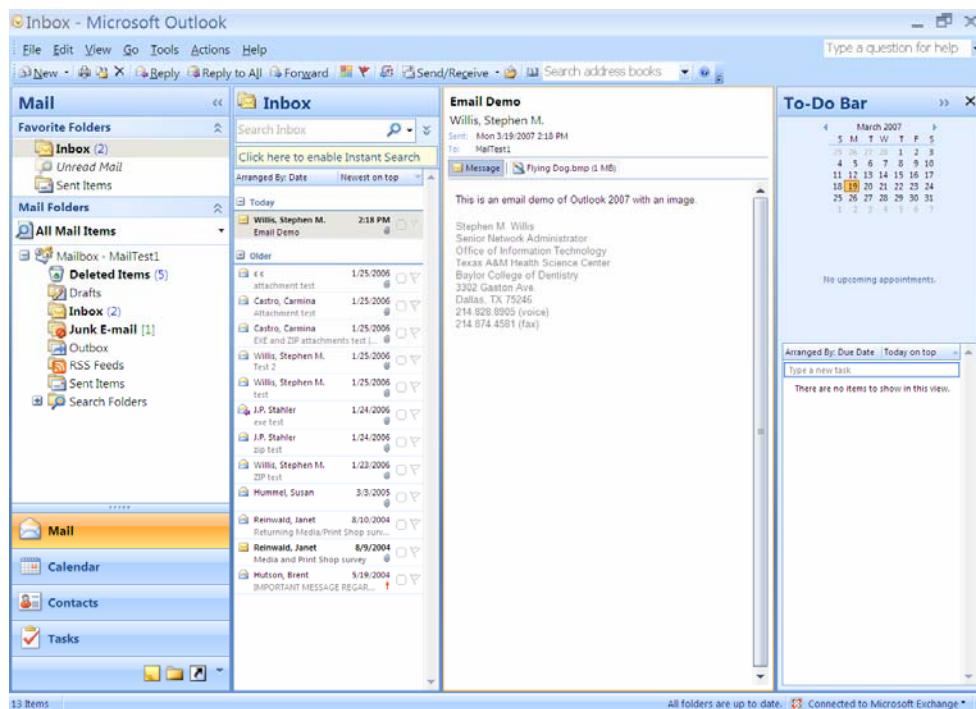
# Outlook 2007 Tutorial

## Basic Email

Begin by double-clicking on Outlook 2007 icon in Start/Programs/Microsoft Office or the Desktop.



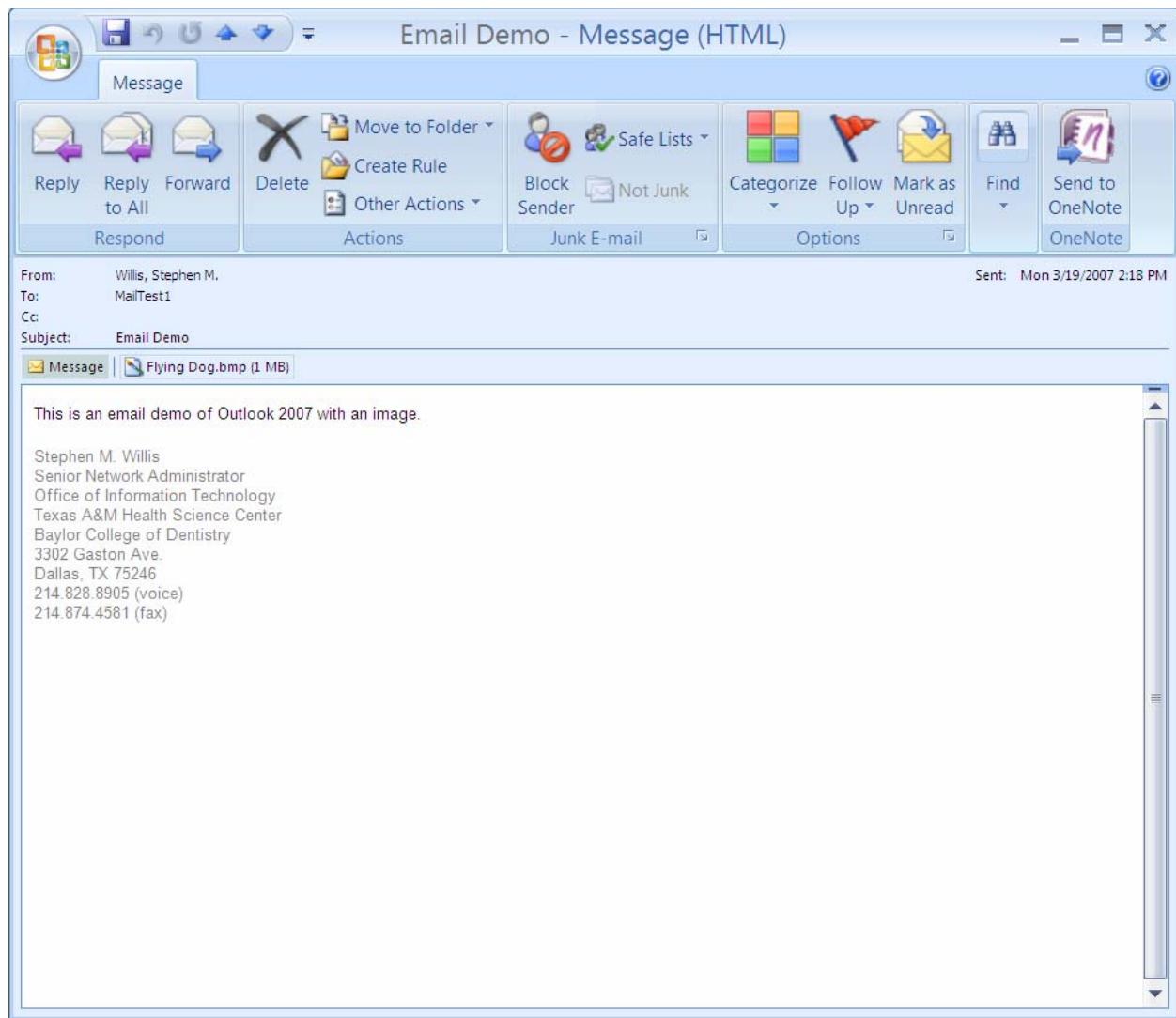
The opening screen of basic email services of Outlook 2007 will appear.



## To read an Email

On the left is the email folder pane. By clicking on the Inbox, you can see your newly arrived email as well as that email which you have not yet moved to a folder or deleted. Note that the Inbox has been selected and is listed in the second pane. In the Inbox, the message "Email Demo" from Willis Stephen M. has been selected and the message is displayed in the third pane. On the right is a To Do Bar which we will address presently.

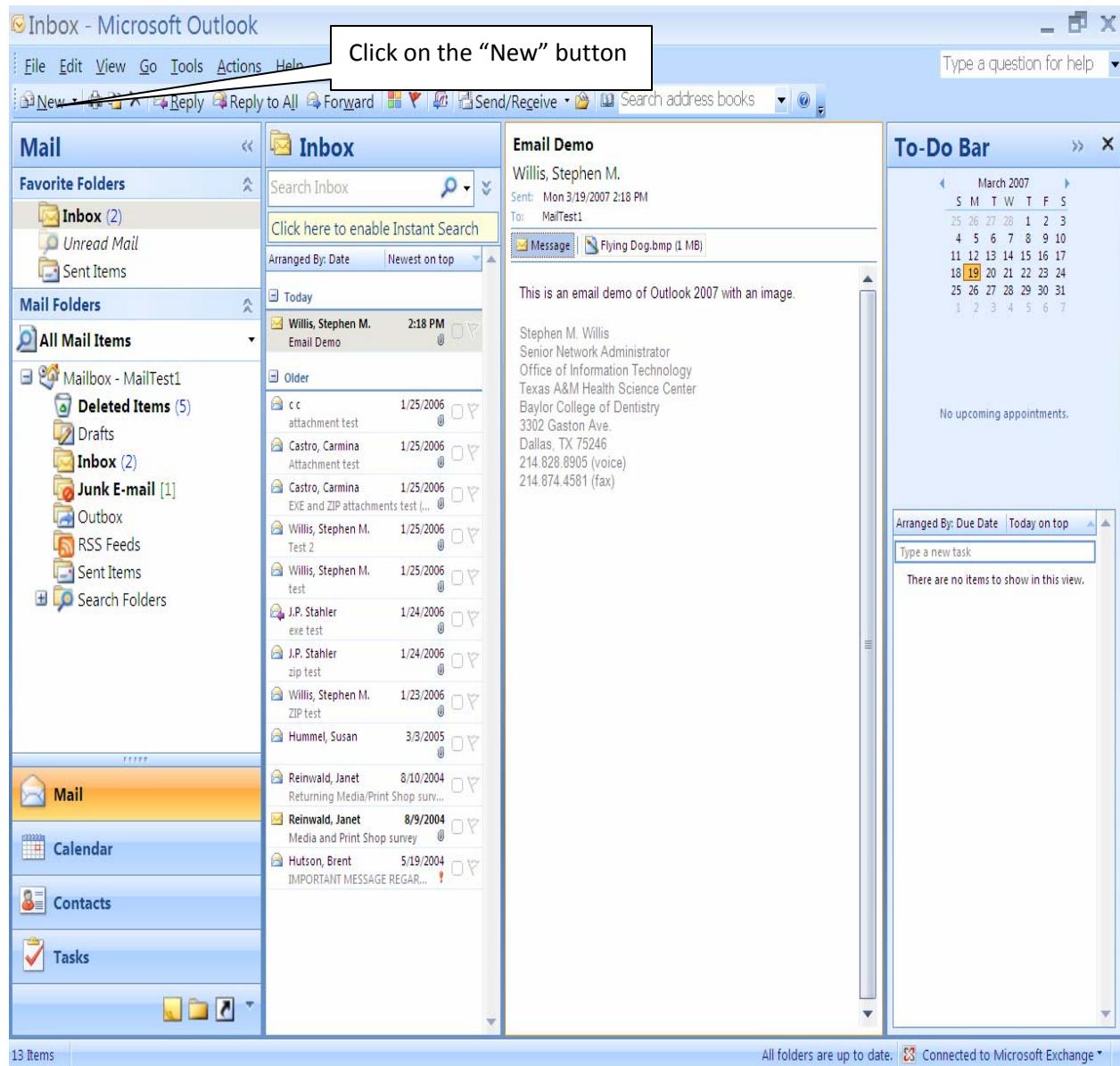
You can select the message in the Inbox and see it displayed in a new window:



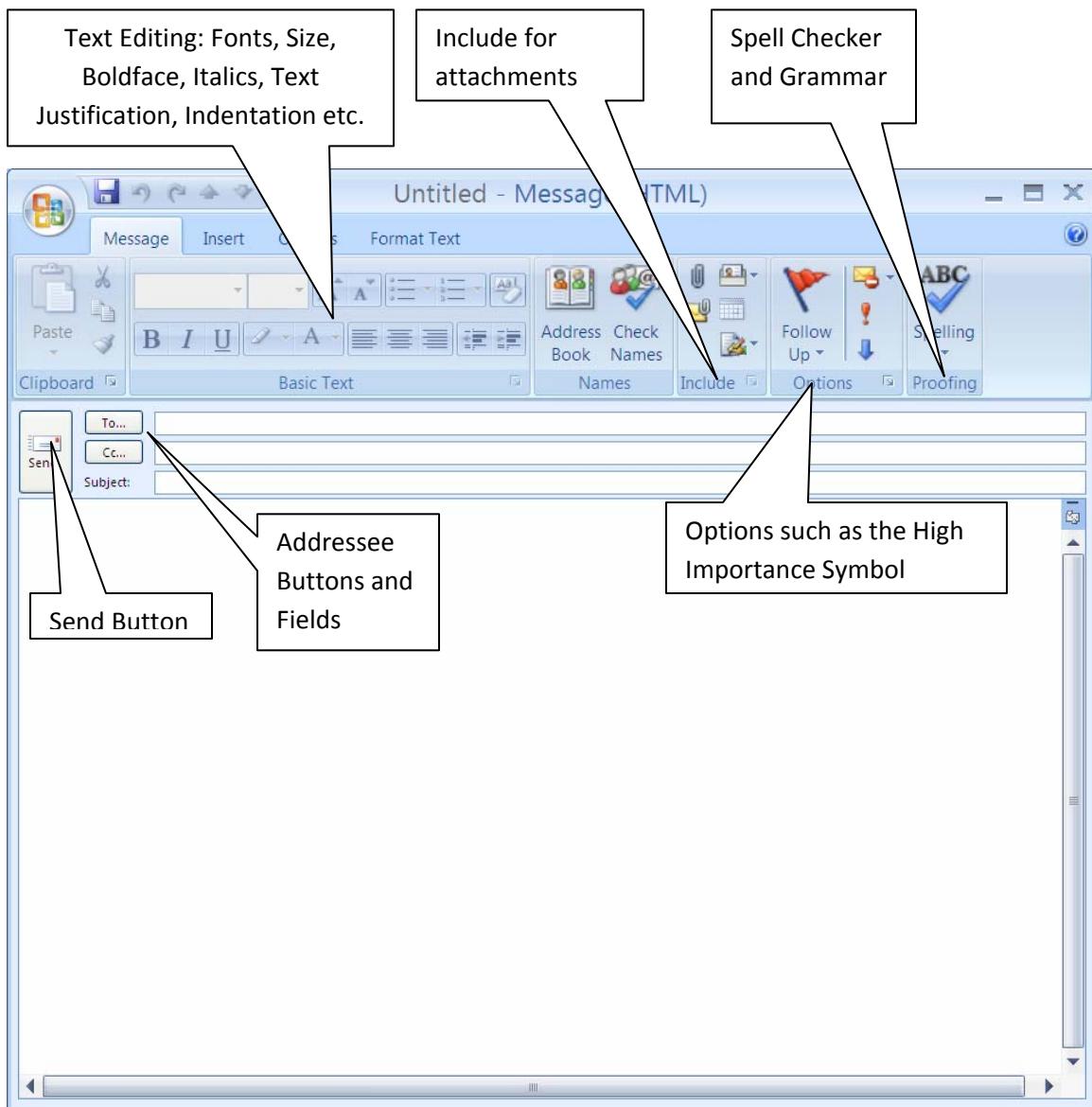
The message has an attachment. If the attachment is selected, it will be displayed in a new window:



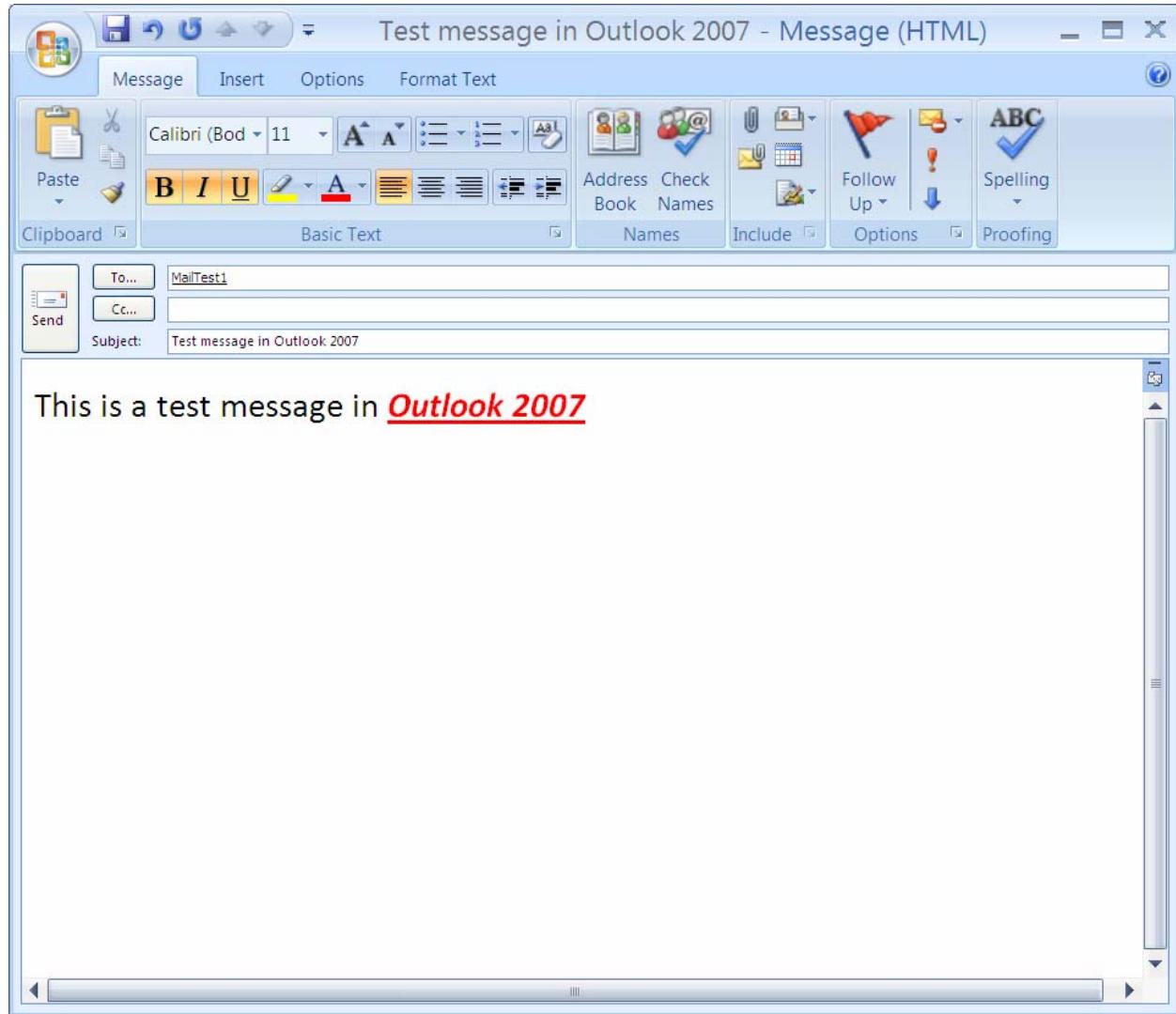
## To create an Email



A new window will open. Note the various Tool Bar and selection buttons

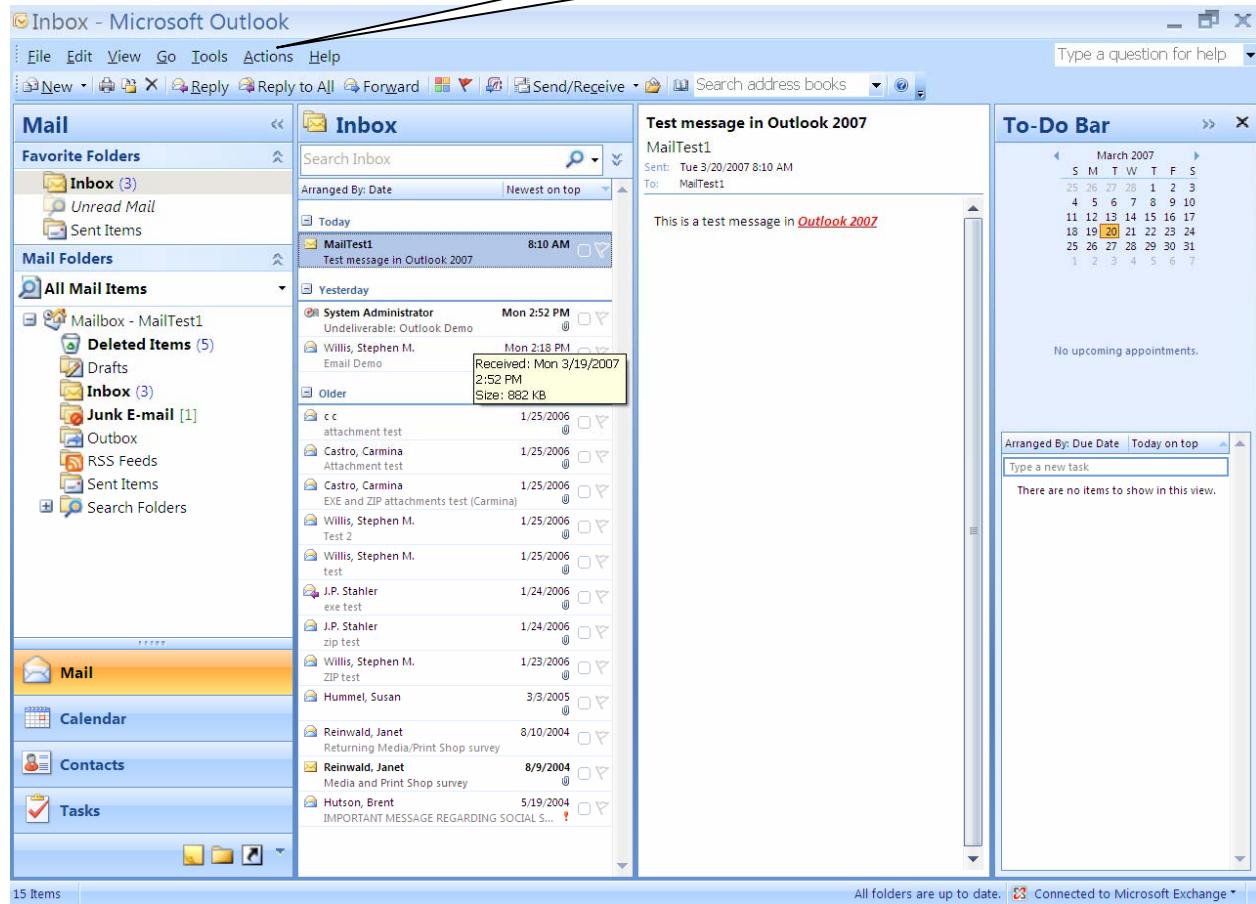


To create an email, fill in the address and subject fields and enter your text. Perform any editing functions such as text formatting or spell checking, attach a file if you wish, and then click on the “Send” button and the email is sent.



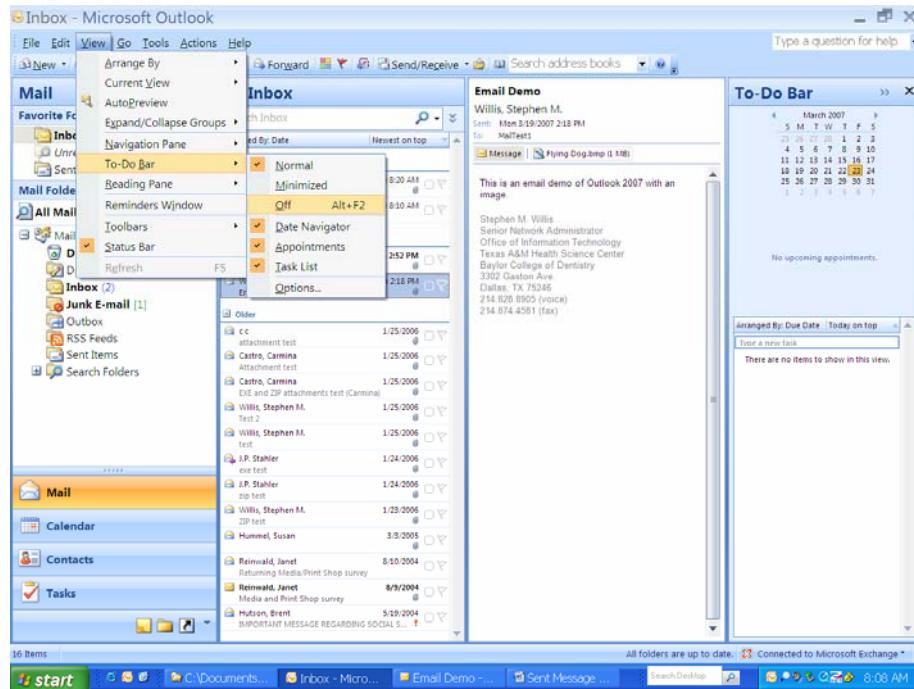
The email is then received by the addressee:

Note the Menu Bar. We will discuss it next.

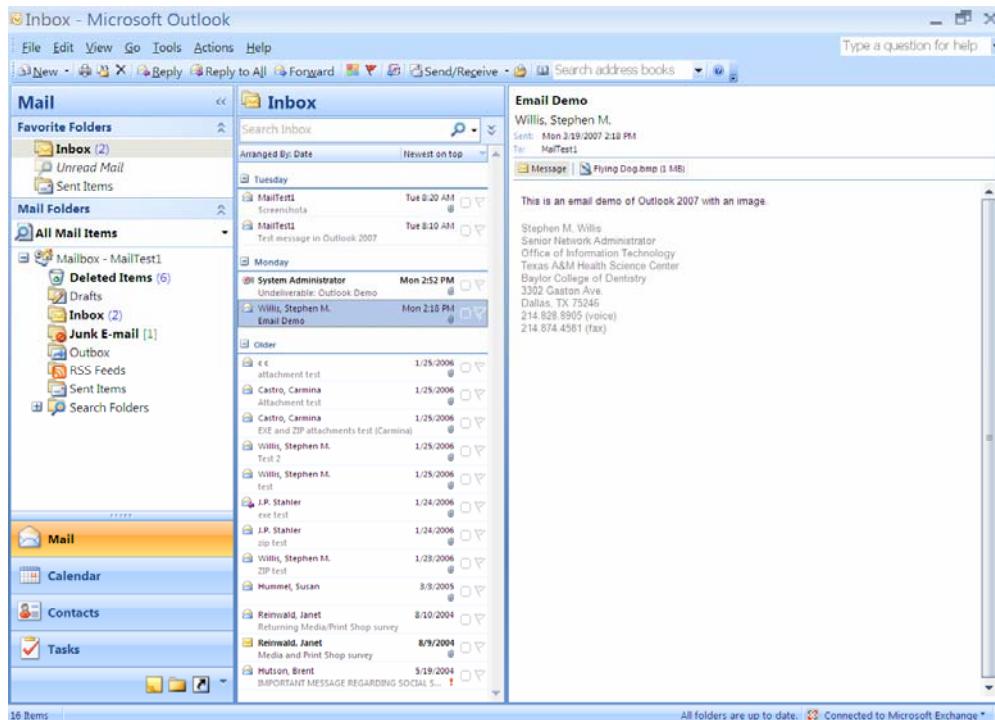


## Use of the Menu Bar

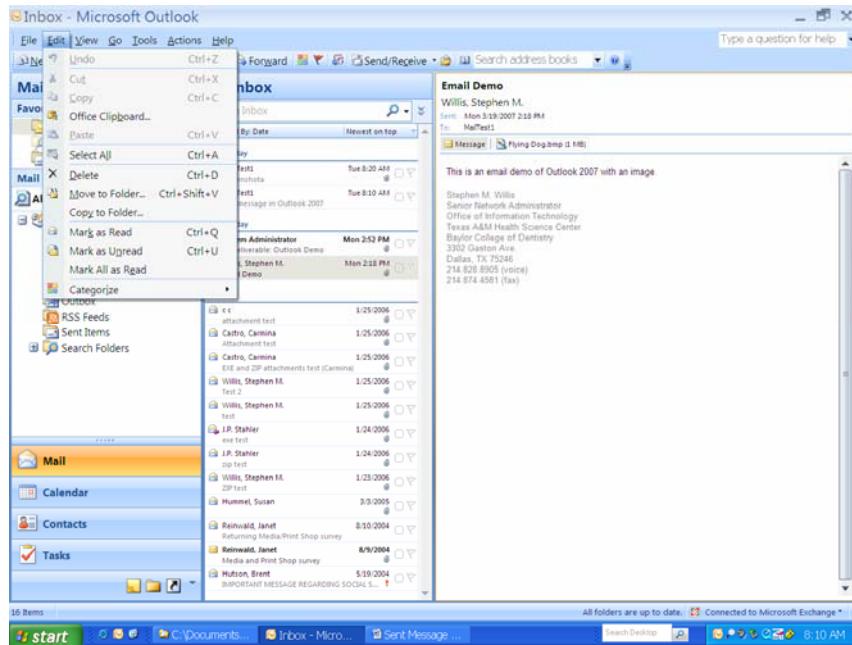
The Menu Bar is the horizontal bar below the title bar that contains the names of command dropdown menus. You can click a Menu Bar name to display that Menu's list of commands:



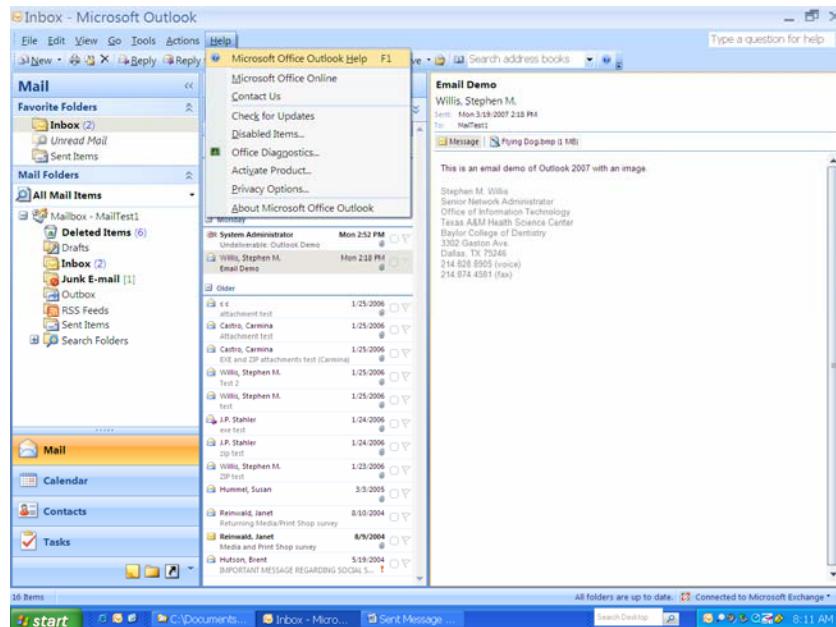
In this example, we select View/To-Do Bar/Off. The result is to turn off the To-Do Bar:



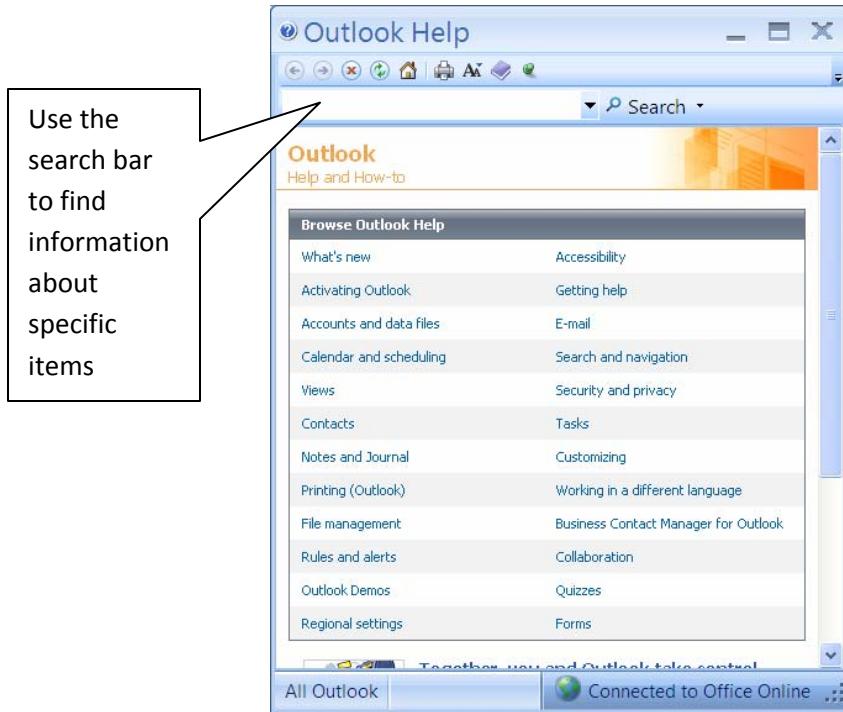
You can use the Menu bar to customize your Outlook 2007 program's appearance, configurations, edit your text, and perform many other functions. Please explore the Menu bar and the Tool Bars to familiarize yourself with their options.



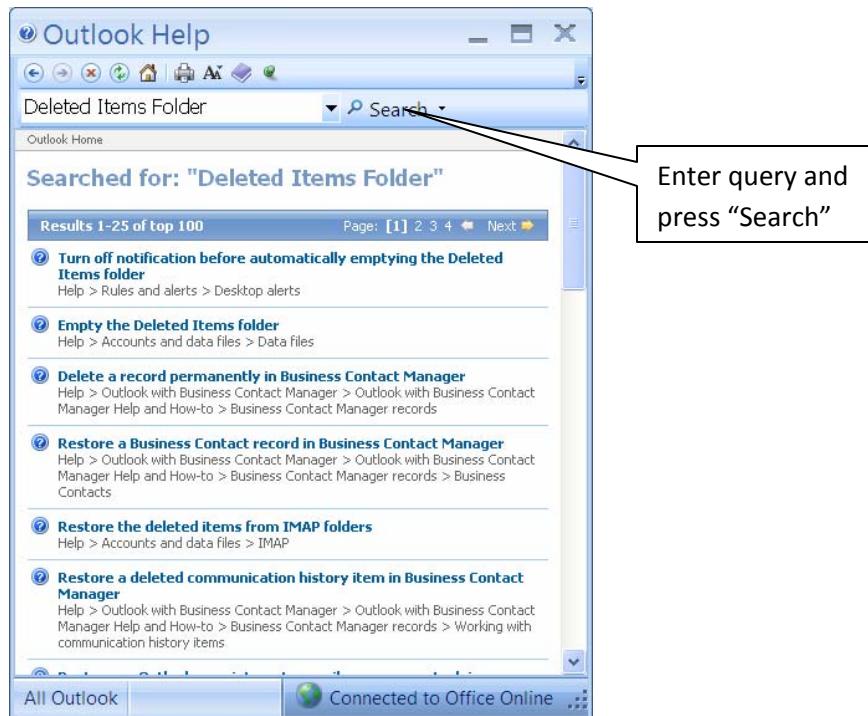
Finally, perhaps the most important Menu is the Help item, as you can open Help and select "Microsoft Office Outlook Help and search the Microsoft Outlook site for instructions, procedures, problem resolutions, etc.



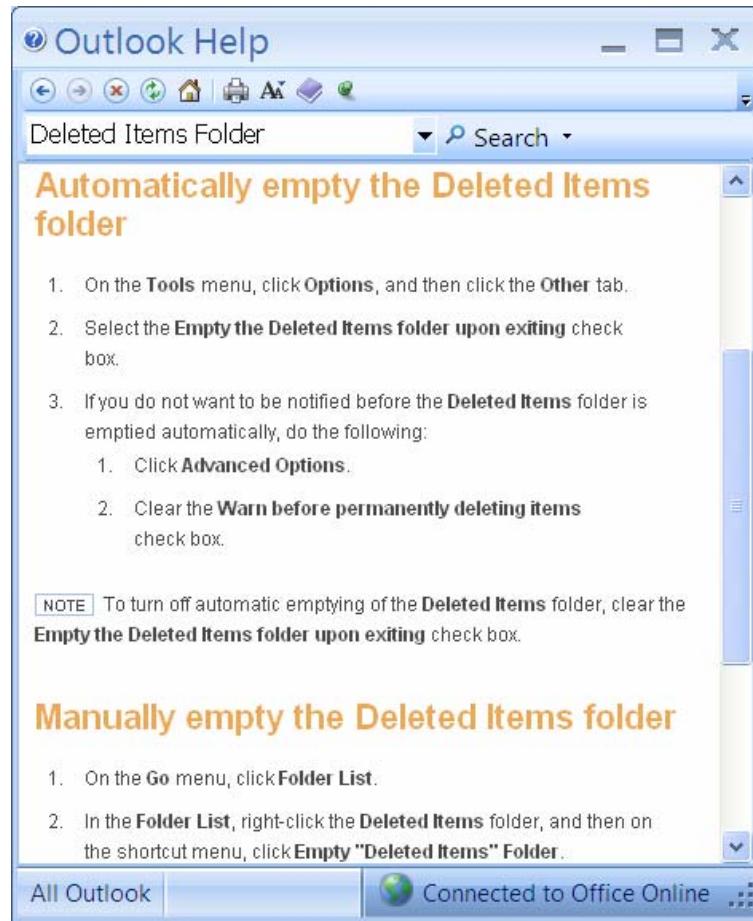
Selecting “Microsoft Office Outlook Help” from the Help dropdown menu will bring up the following window:



For example, how do you empty the “Deleted Items Folder”? Use the Search function:

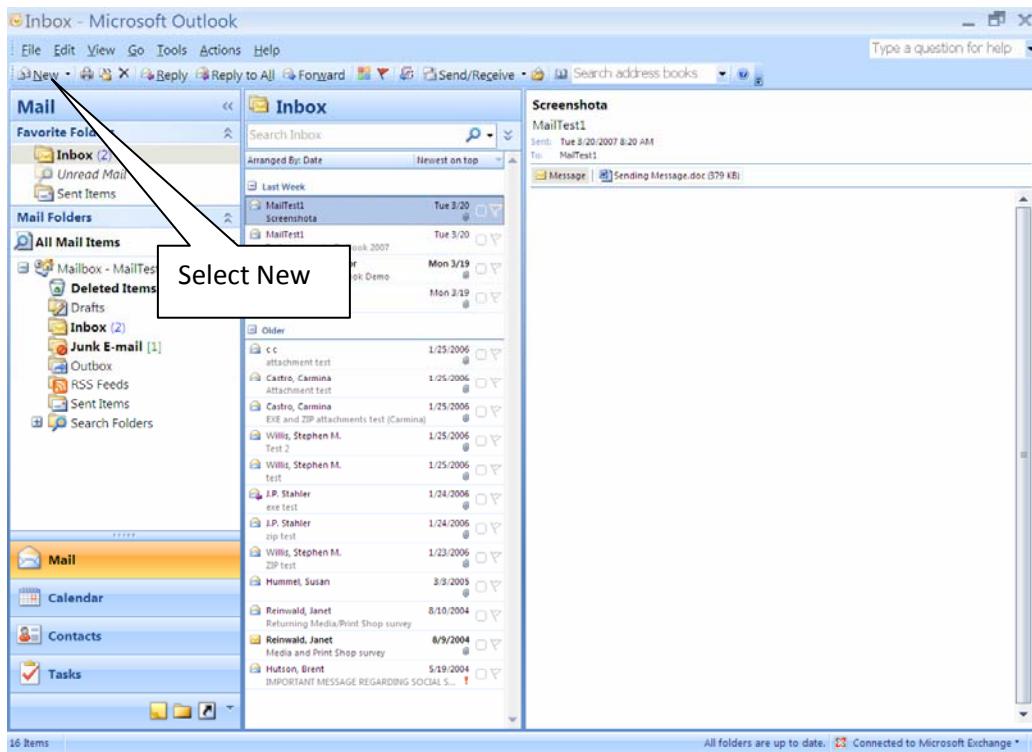


Select “Empty the Deleted Items folder” and directions and information are displayed:

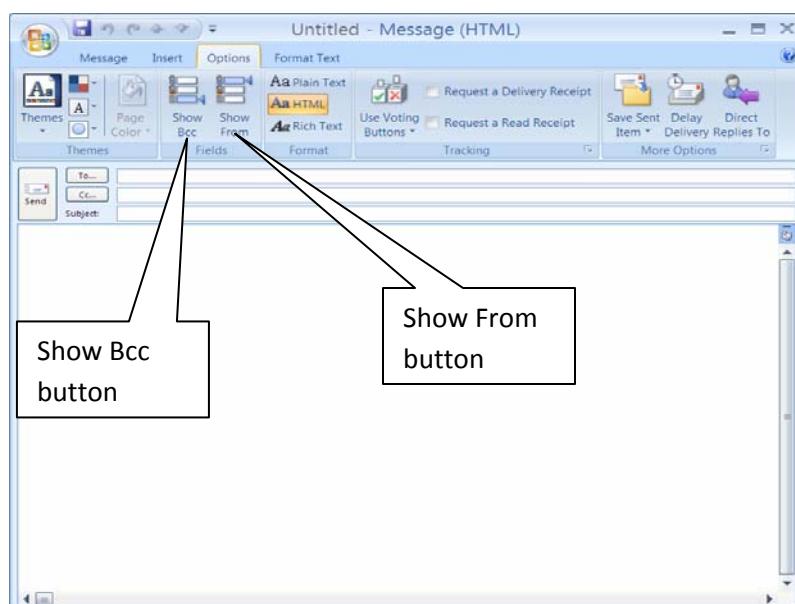


## The Address Book

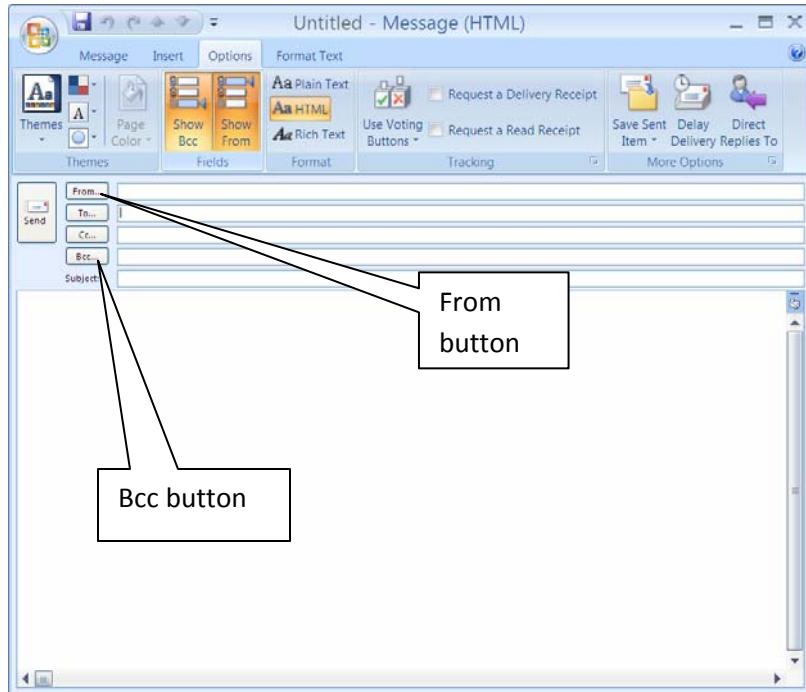
The address book contains the names and possibly other information about everyone in the organization who has an email address. It is arranged alphabetically by last name. To use the address book, open Outlook and select New.



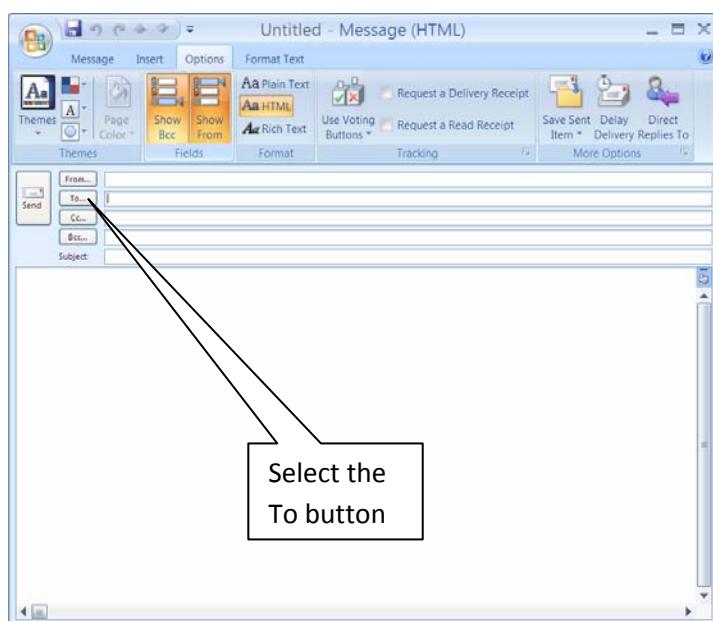
The new message window will open. First, let's customize the appearance of the Message format by selecting Show Bcc and the Show From buttons.



The Blind Carbon Copy (Bcc) button and the From button will appear from now on.



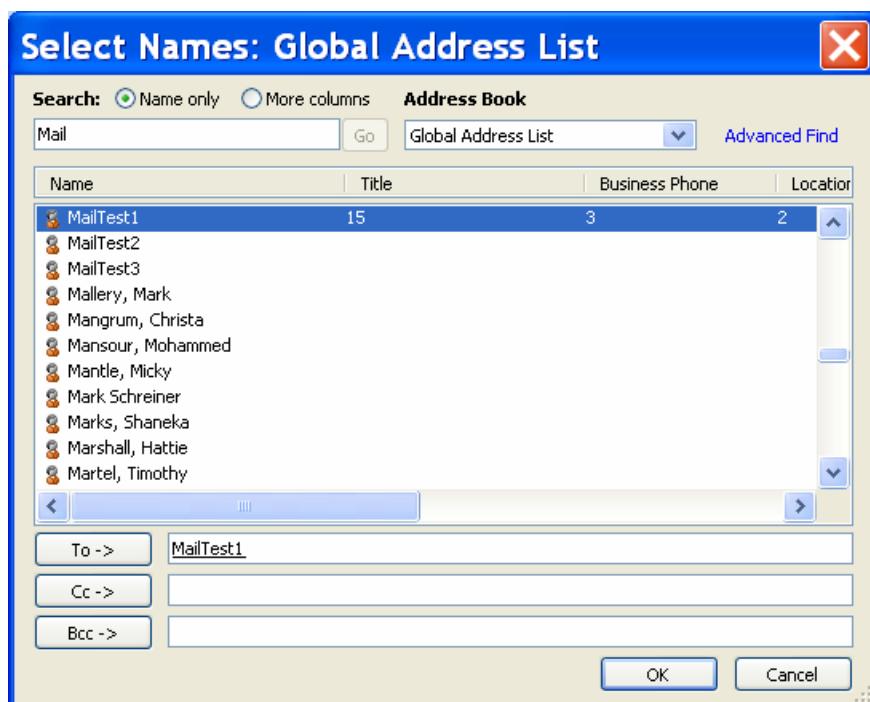
Select the To button:



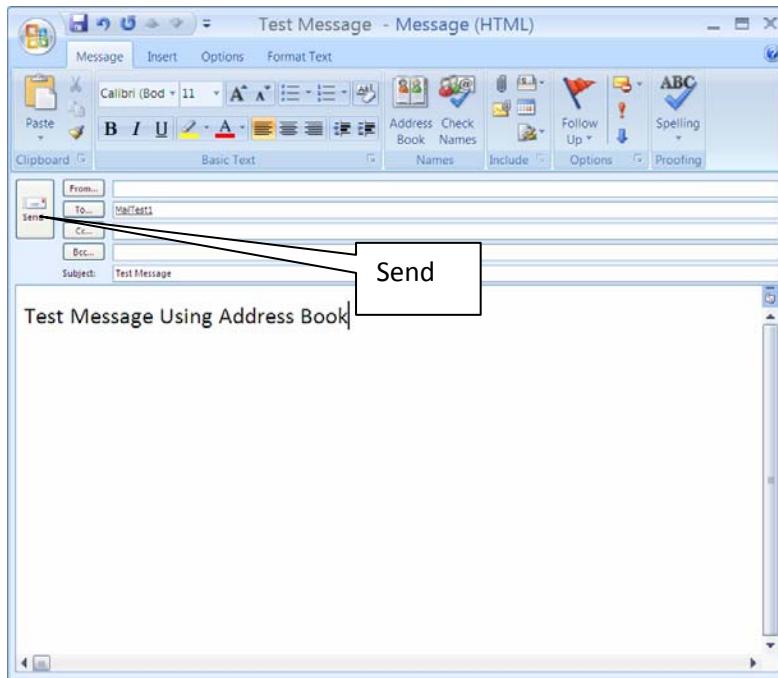
The Address Book window will open:



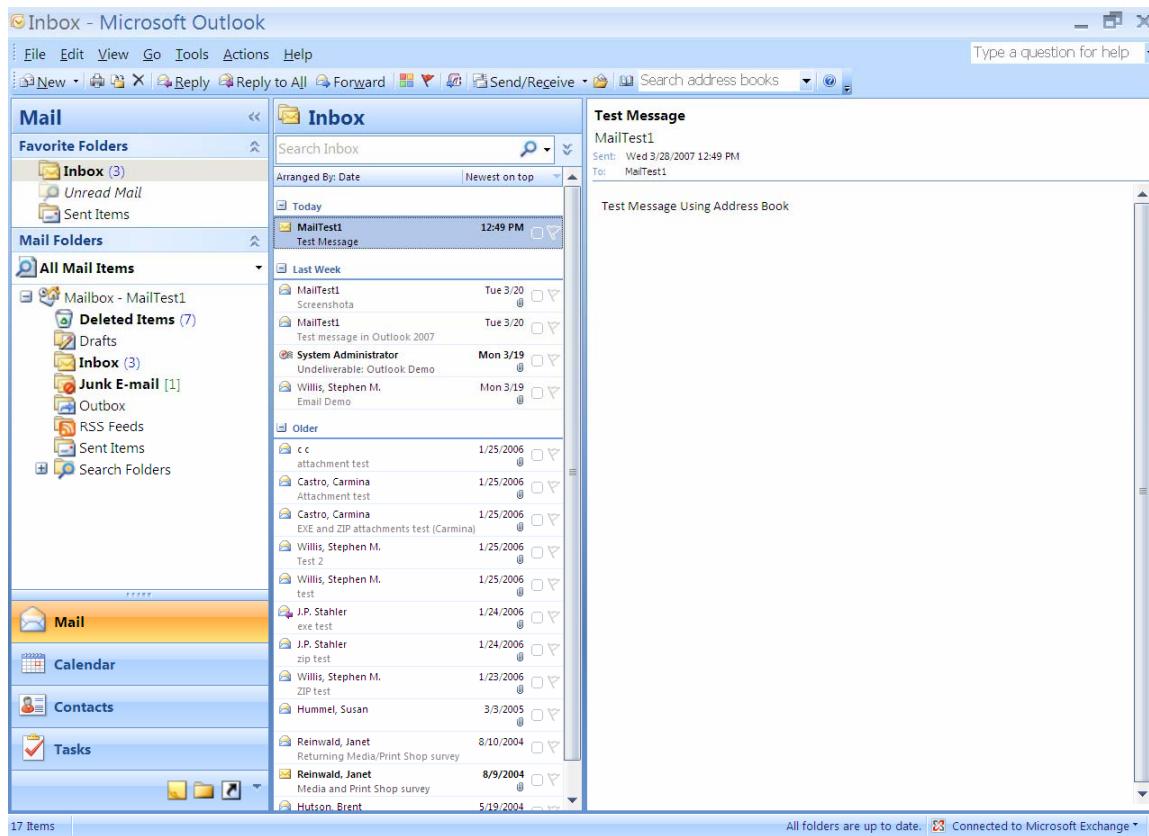
There are two types of entries: Users and Distribution Groups (groups of users) To select the message recipient, type the first few letters of their last name into the Search field and highlight the person or mailbox to whom you wish to send the message. Select the To button (or the Cc or Bcc buttons, if desired) and then select OK. The process can be repeated for multiple recipients.



The New Message window will reopen with the addressee in the To field:



Press the Send button and the message is sent:

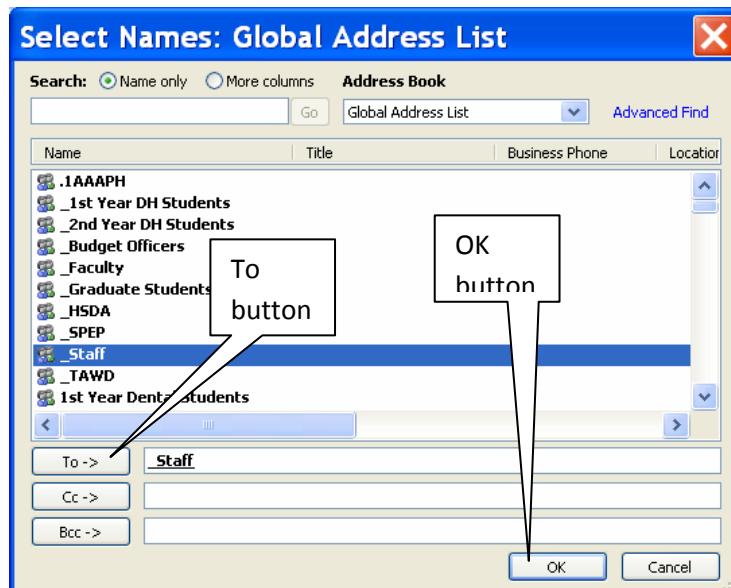


## How to use Distribution Groups

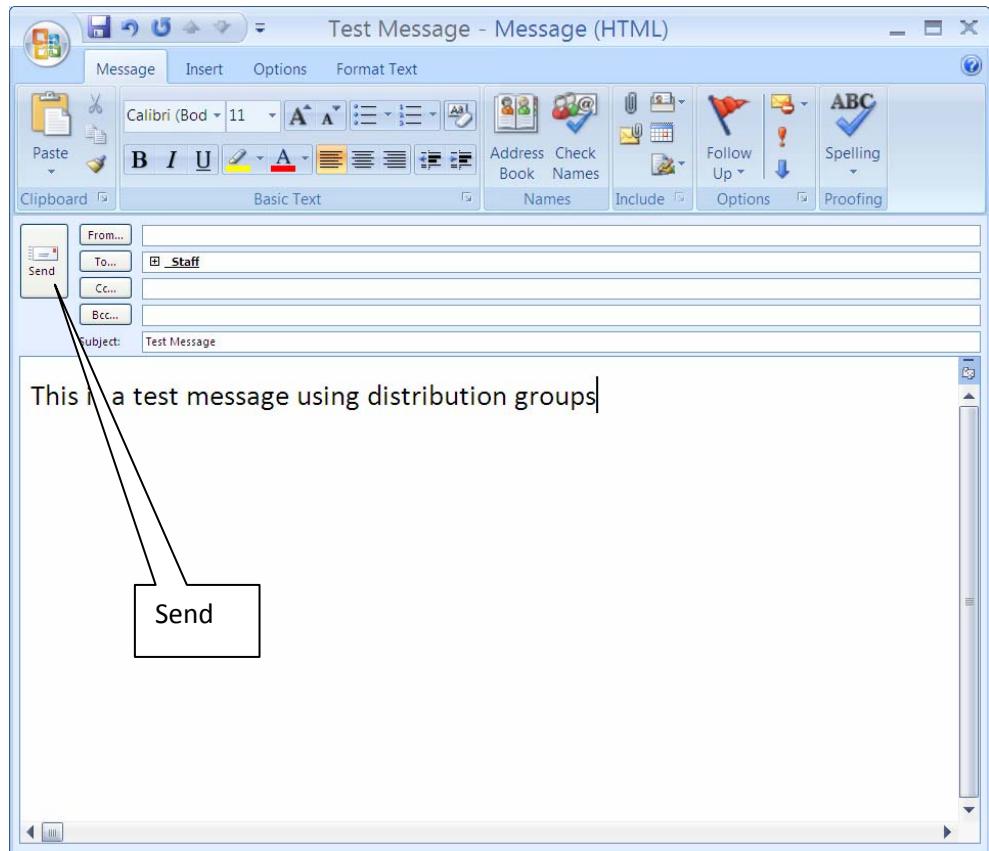
A Distribution Group is a group of users which can range from a small group to the entire organization. It is used to email groups of users without having to select each recipient. To see how they work, again from the opening screen select New / To to get to the Address book:



Select a Distribution Group (a boldface entry with the two person icon), in this case \_Staff. Then select the To button followed by the OK button:

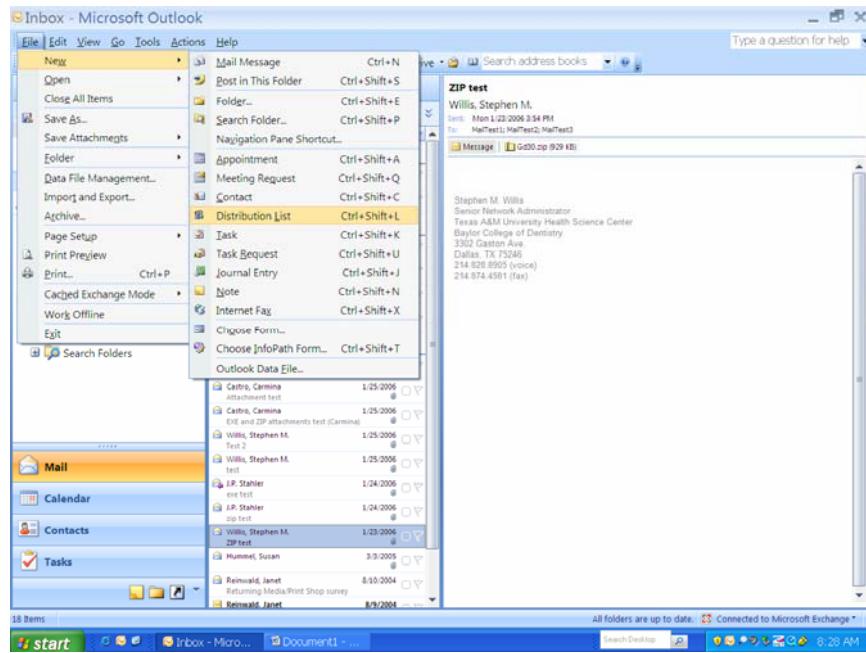


Finally, select the Send to send your message to everyone in the \_Staff Distribution group.

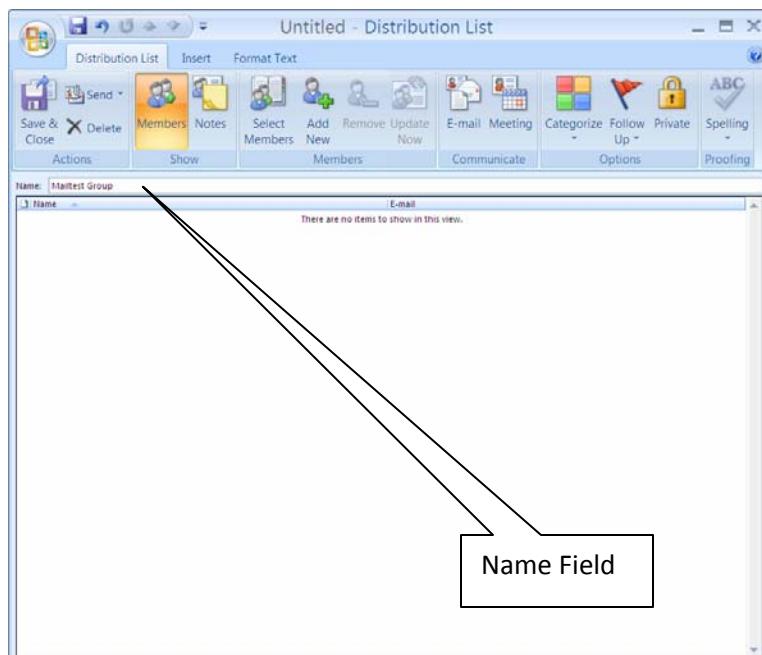


## Creating New Distribution Lists

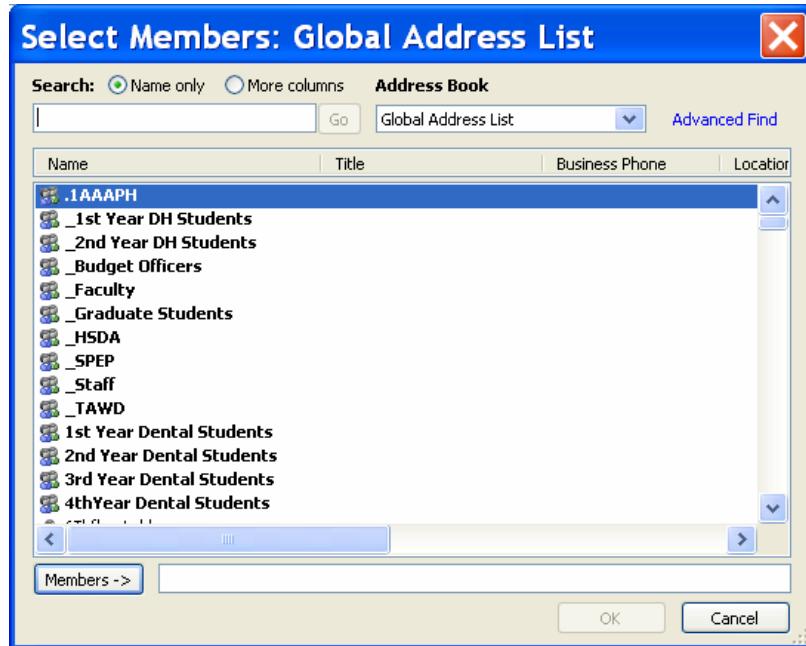
To create a new distribution list, open the File menu and select New and then Distribution List (or from inside Outlook 2007, press Ctrl+Shift+L):



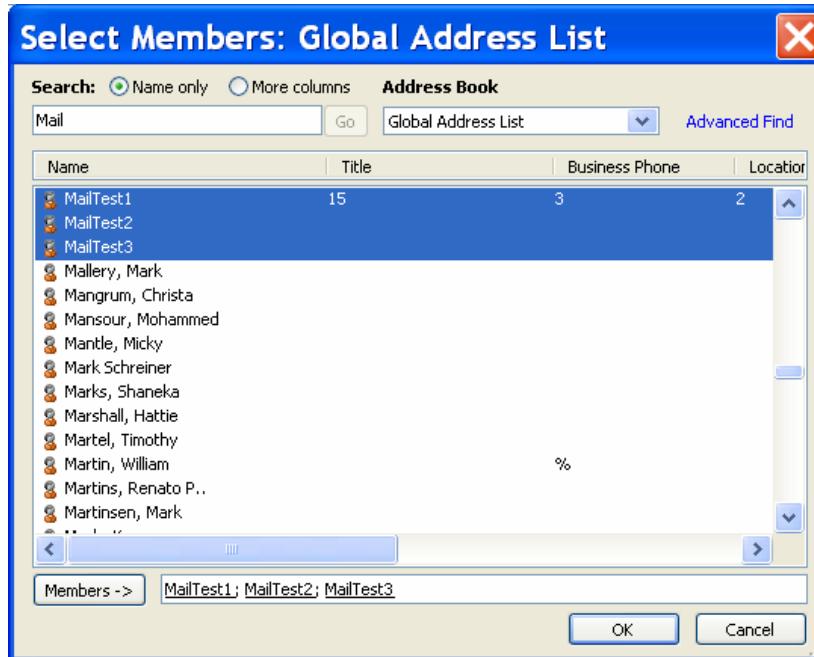
In the Name field, enter a name for the new Distribution List, and then choose the Select Members tab:



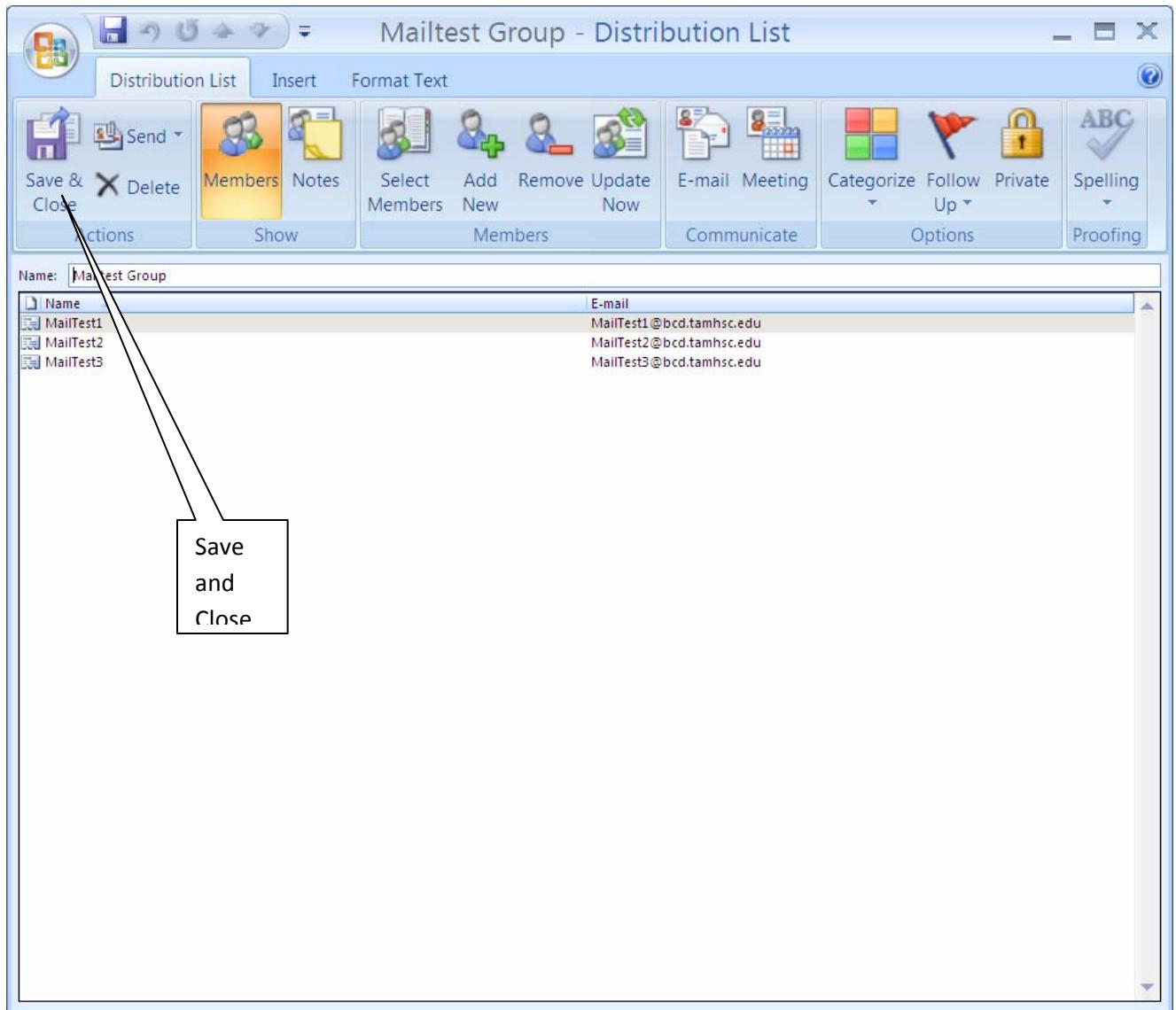
The Global Address book will open:



Use the Search utility as you did before to find the new members of the Distribution List. Select the people or mailboxes you want in the Distribution List and click on the Members button, followed by the OK button:



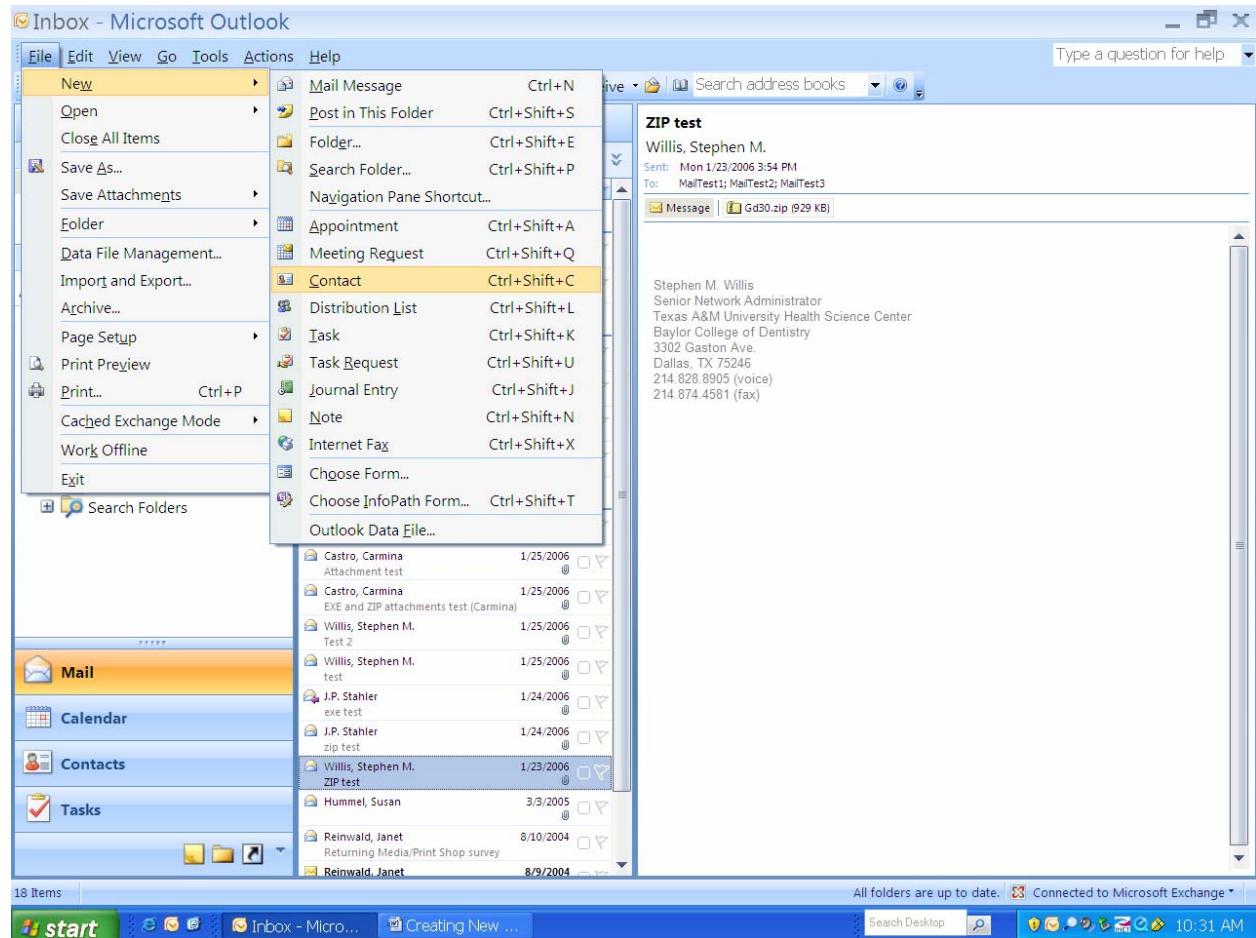
The selected members are added to the new Distribution List:



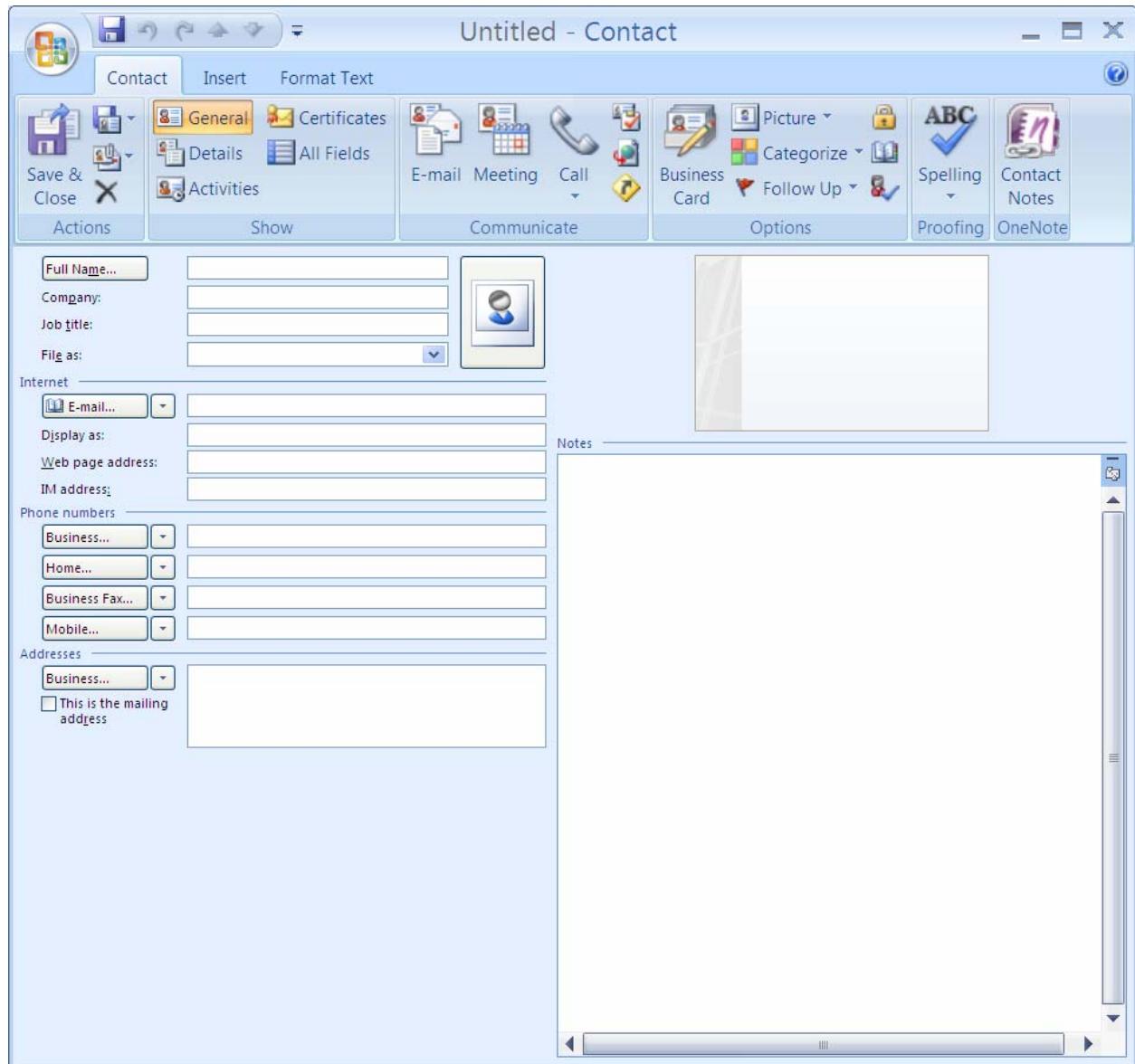
Select the Save and Close button. The new Distribution List will be saved to your Contacts folder by the name you gave it.

## Creating a New Contact

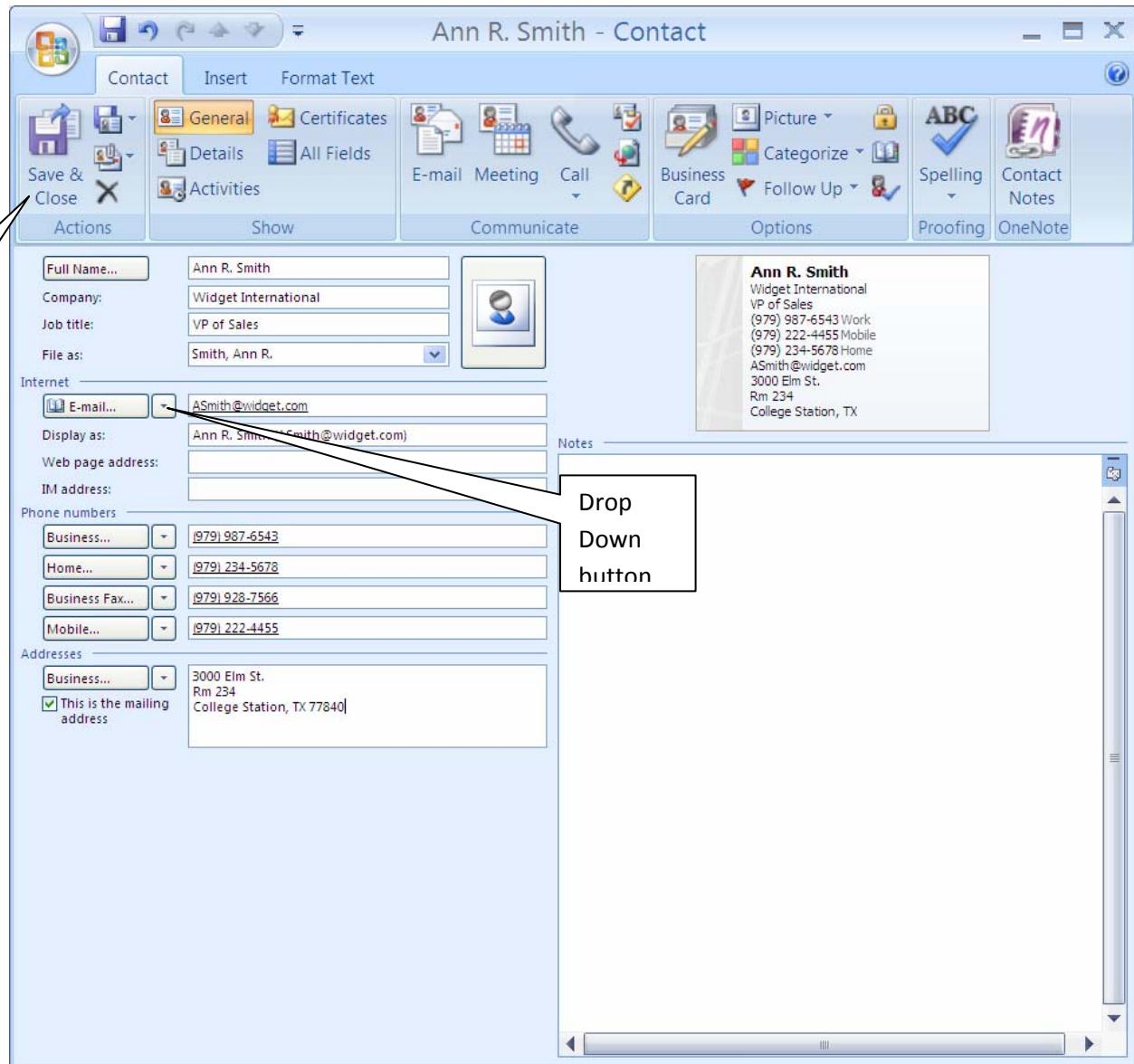
On the File Menu, select New, and then Contact (or from inside Outlook 2007, press Ctrl+Shift+C):



The New Contact Form appears in a new Window:

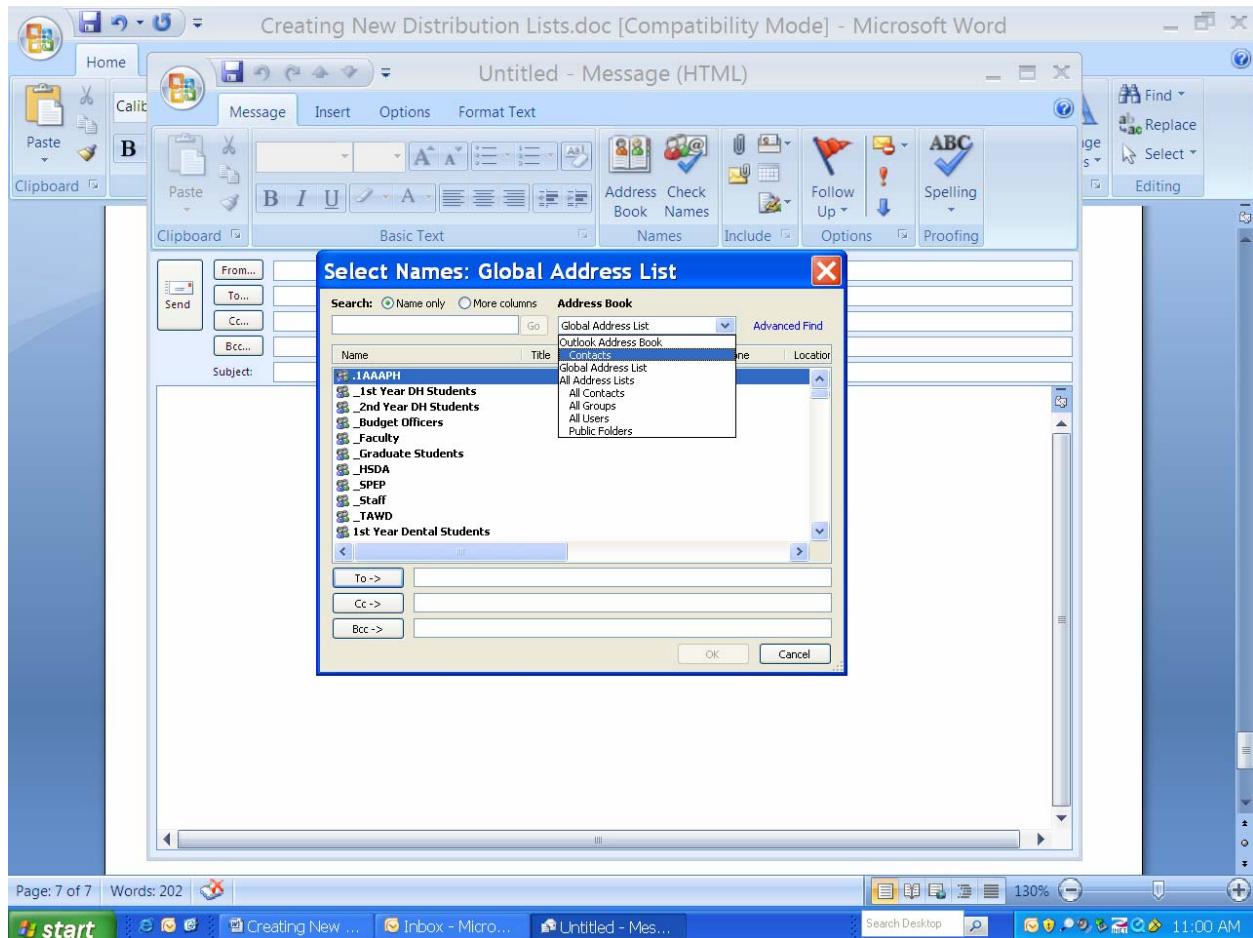


Enter the information you wish to store for this contact. To specify how you want the contact's name to appear in the To field of a message, type the name in the Display As field.

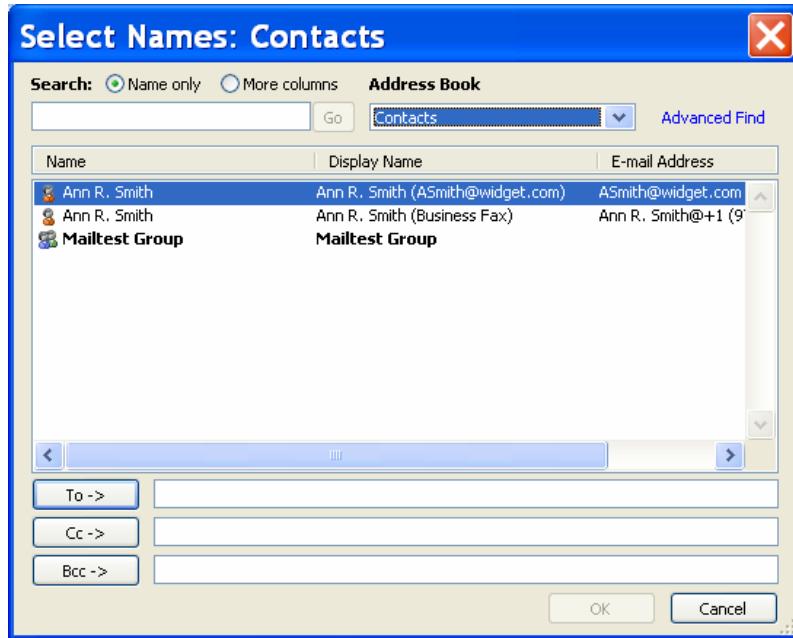


To enter multiple entries for a field such as E-mail addresses or phone numbers, use the Drop Down button next to the field. When finished, press the Save and Close button.

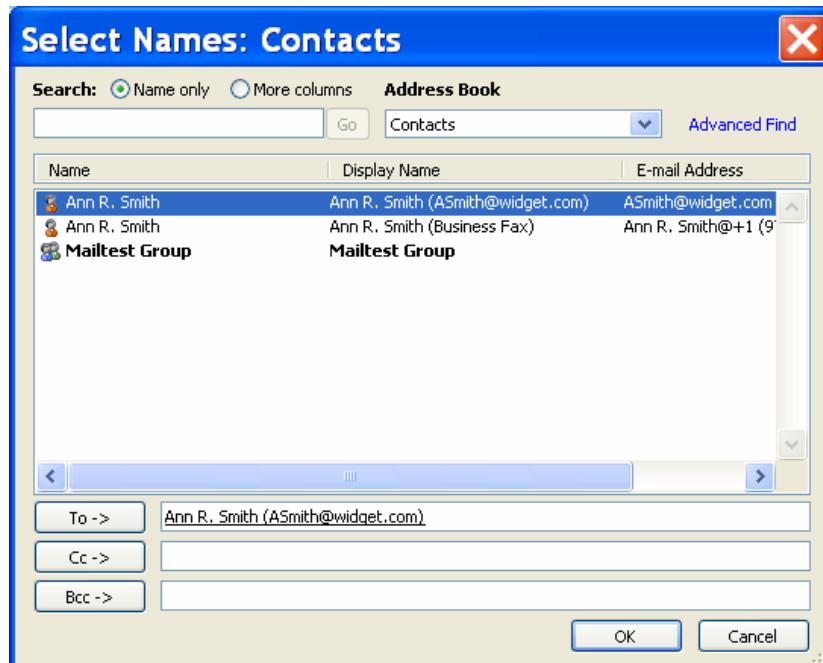
To see the new entry, open Outlook 2007, Select New, then To. When the Global Address list appears, open the drop down list under Address Book and select Contacts.



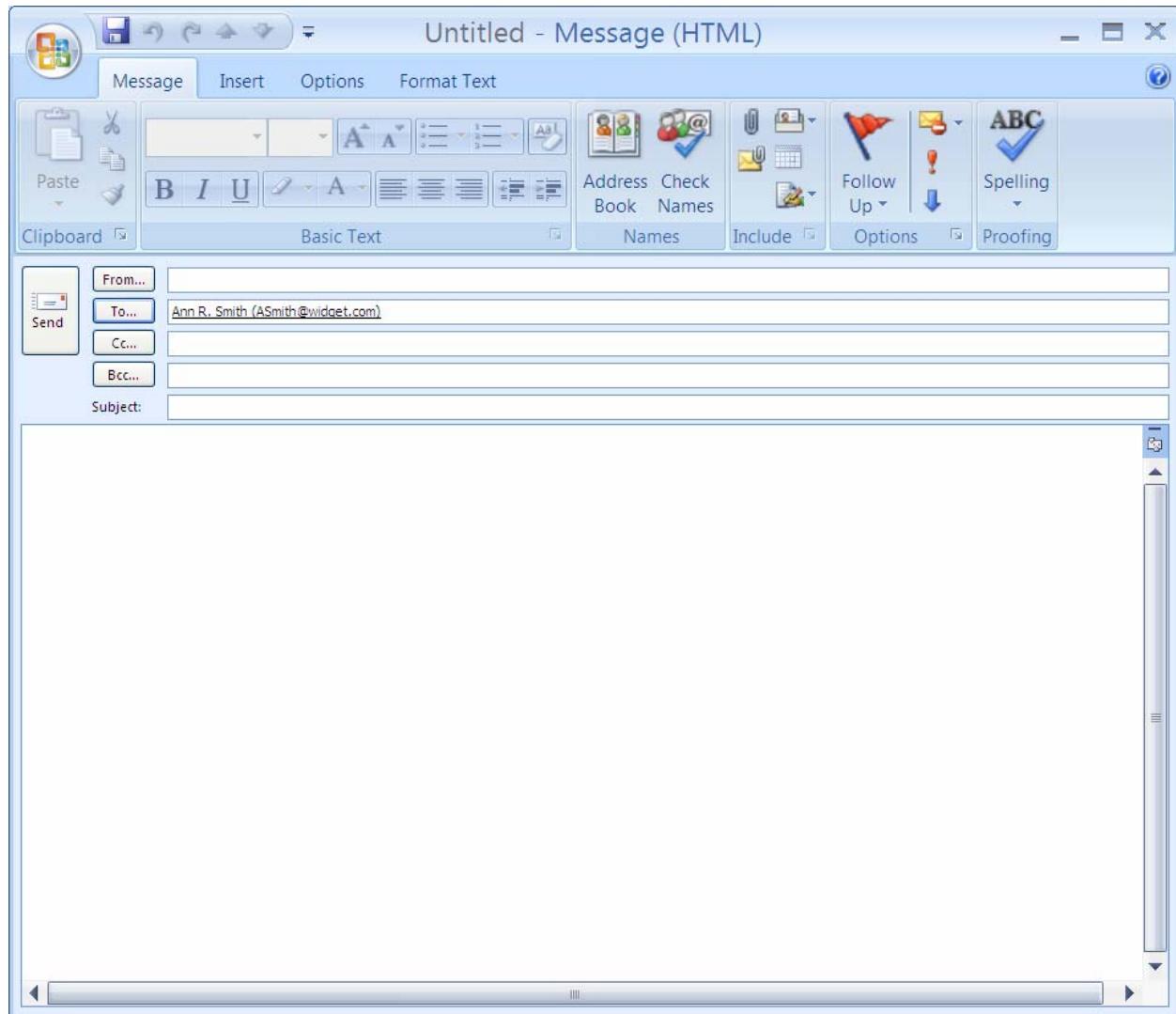
The Contacts Window will open displaying your Contact List:



Note that there are two entries for Ann R. Smith, one for Email and one for Fax. Note also that the Distribution Group Mailtest created earlier is also listed. To send an email, select the email address and press the To button:



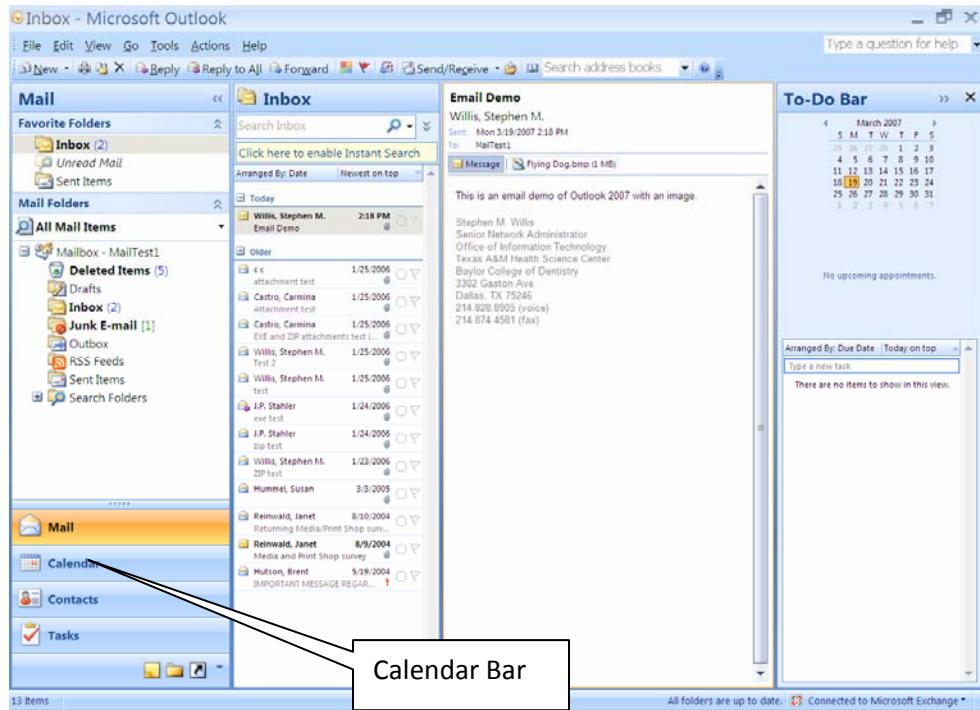
Select the OK button and the New Email form opens:



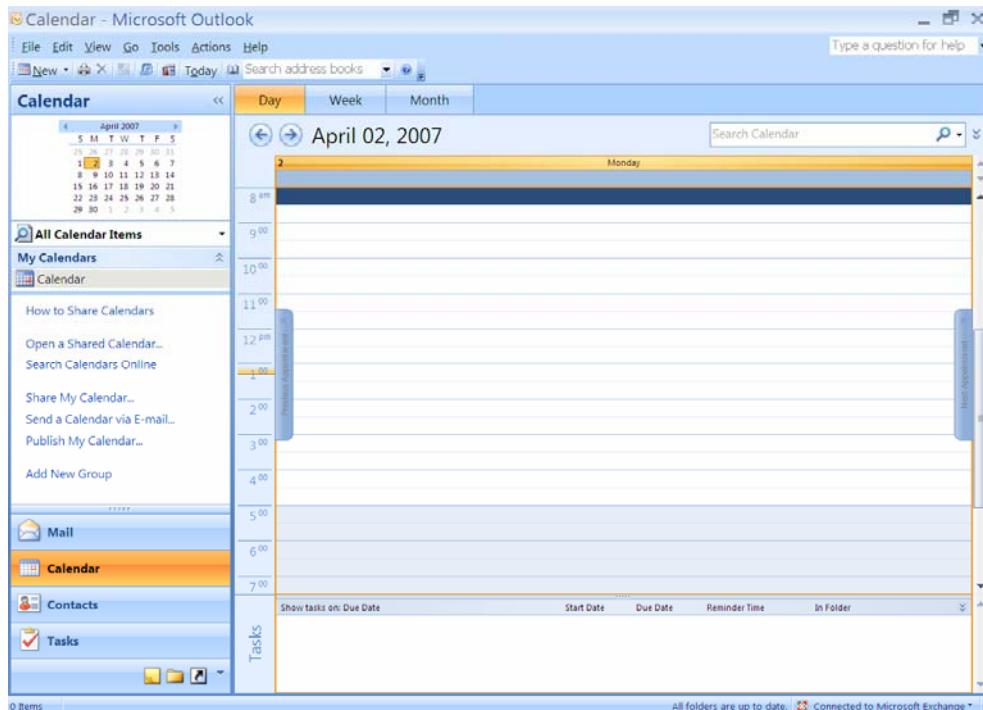
Proceed as before with the subject and message body, and then send the email.

## Using the Calendar

After opening Outlook 2007, select the Calendar bar on the left hand side:

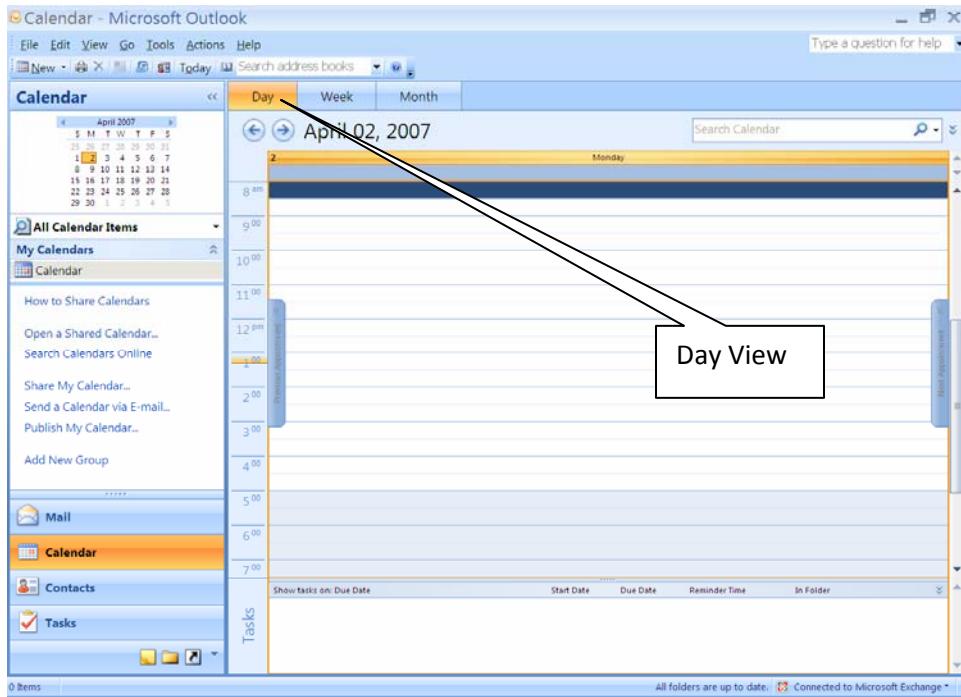


The Calendar will open:

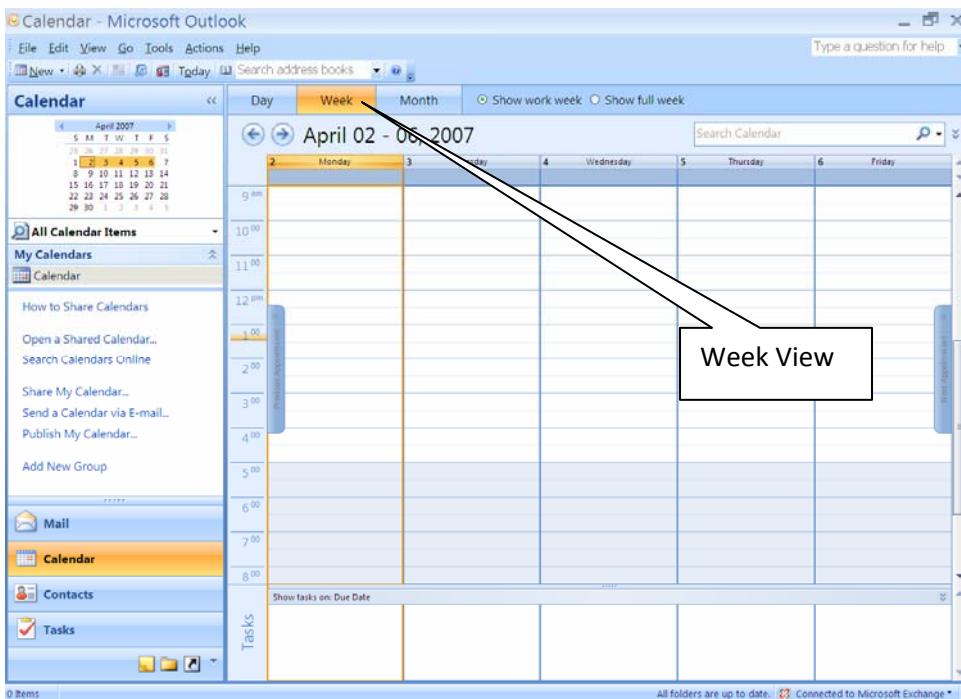


The calendar, like other objects in Outlook 2007, has several views you can customize:

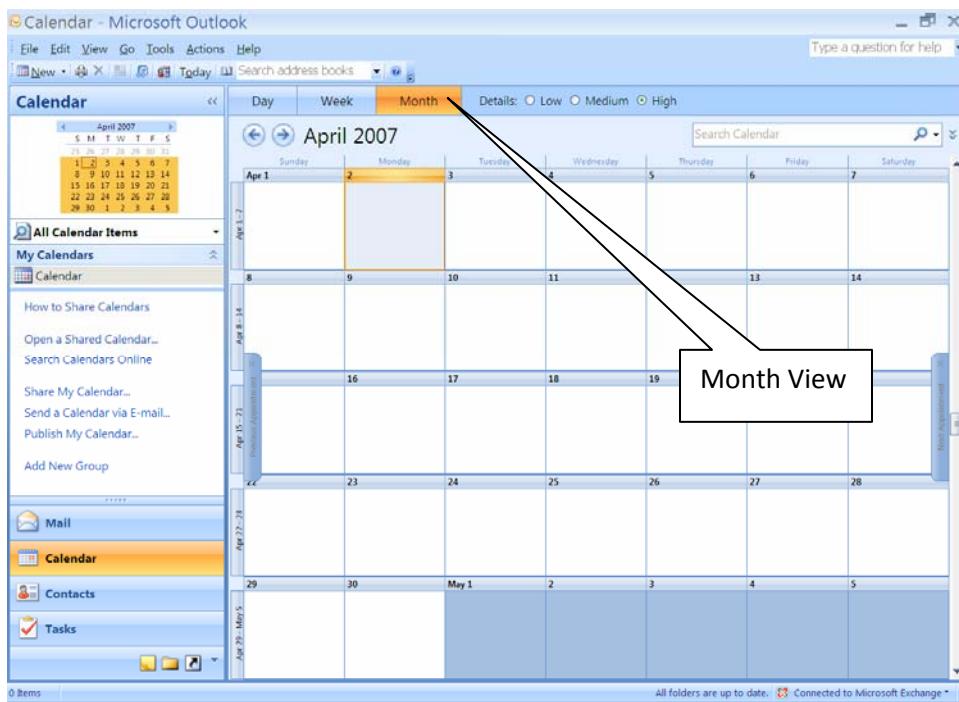
Day View:



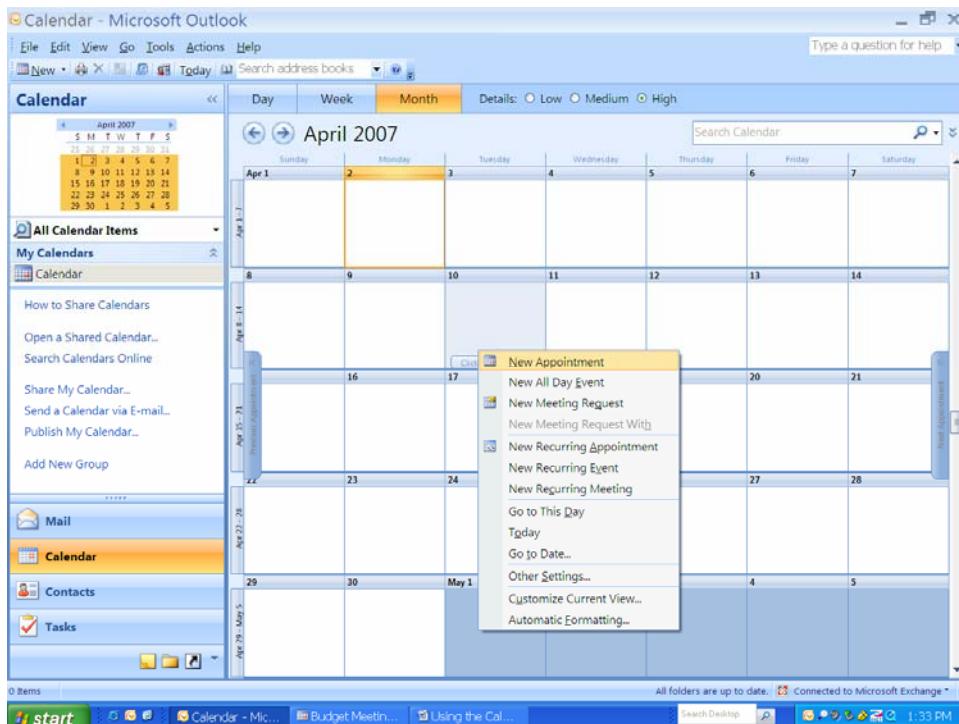
Week View:



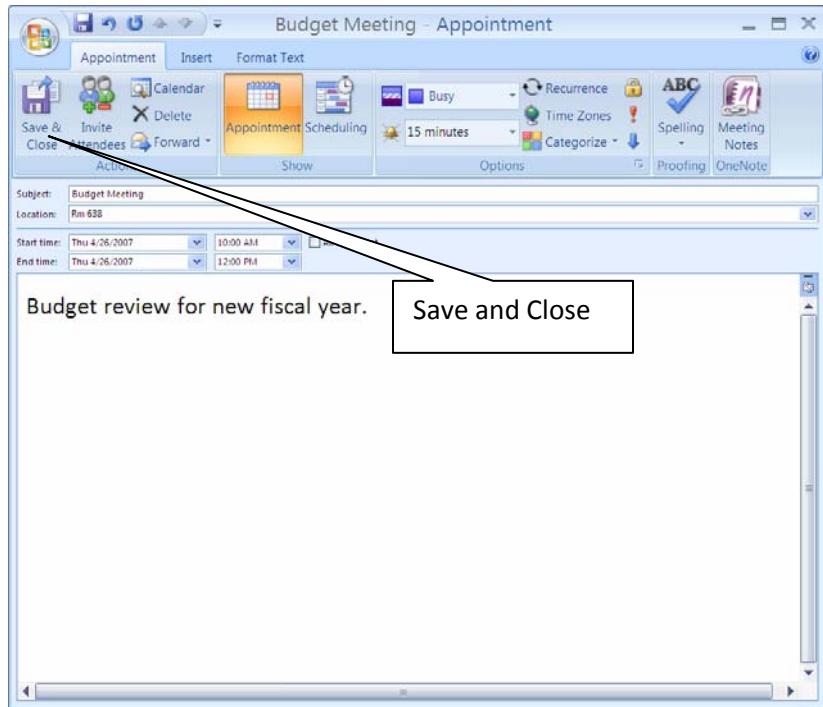
## Month View:



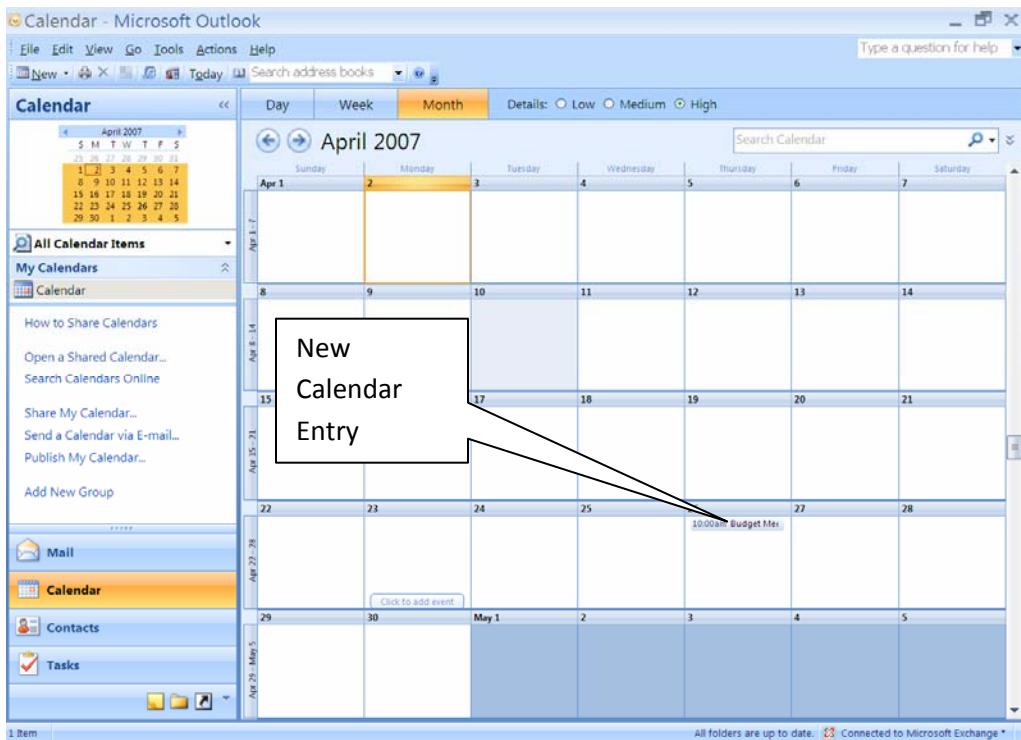
To create an entry, select in the Calendar pane and select New Appointment:



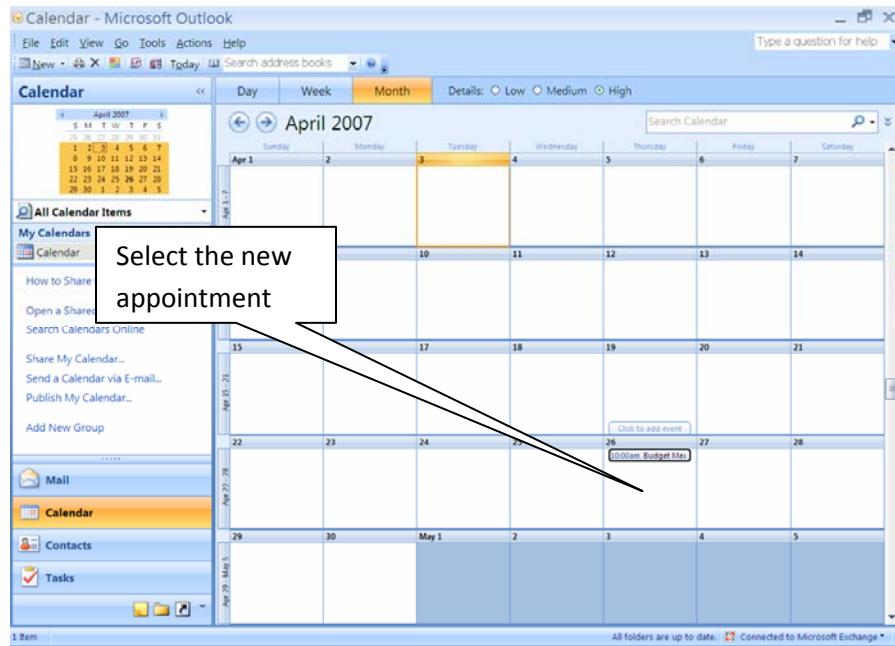
The following window will open. Fill in the various fields with the information on Name, Date, Time, Location, etc., and then select Save and Close when done.



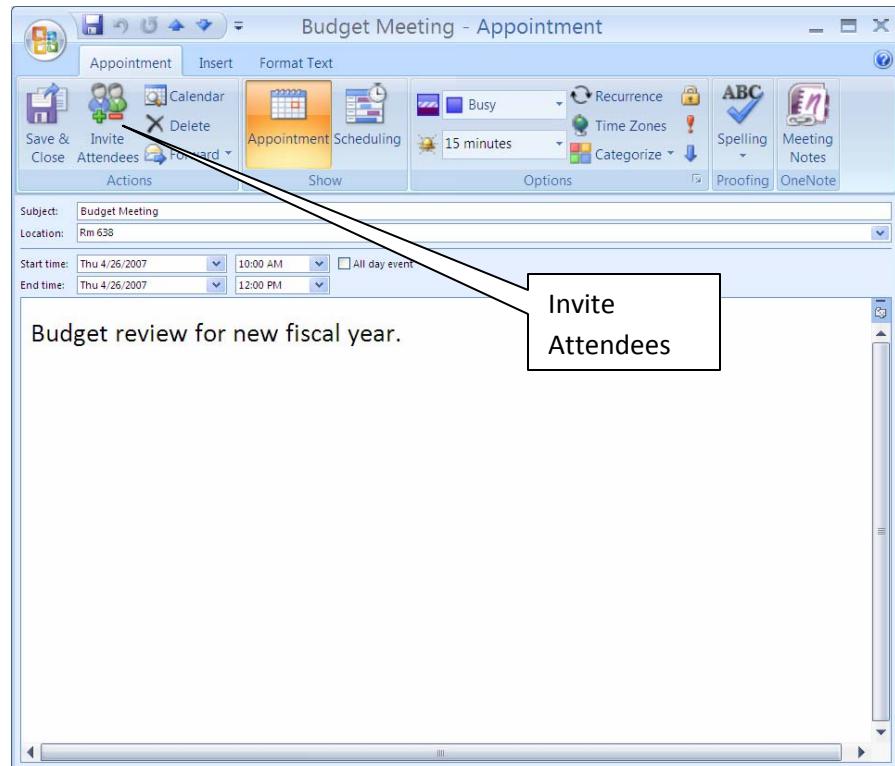
The meeting date and time appear.



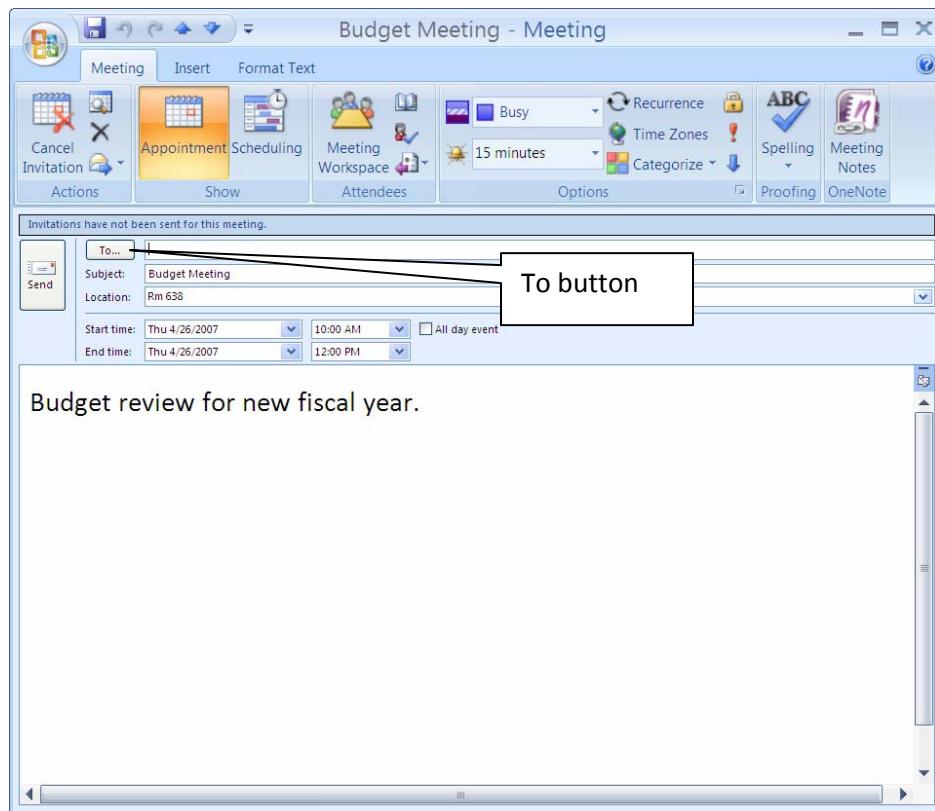
To invite others to the meeting, select the appointment you just made:



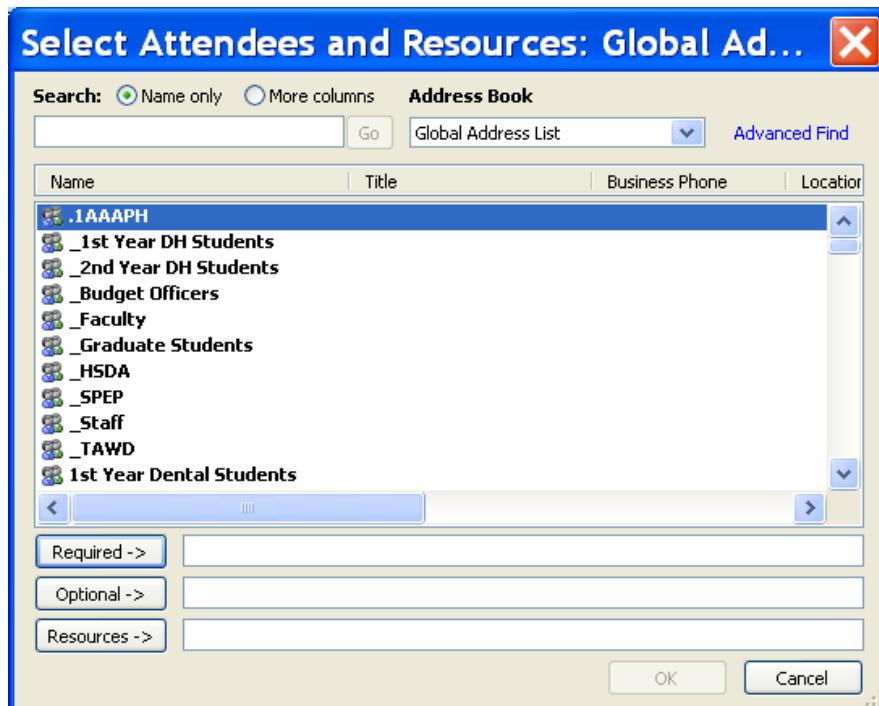
The following window will open:



Select Invite Attendees and the next window will appear.

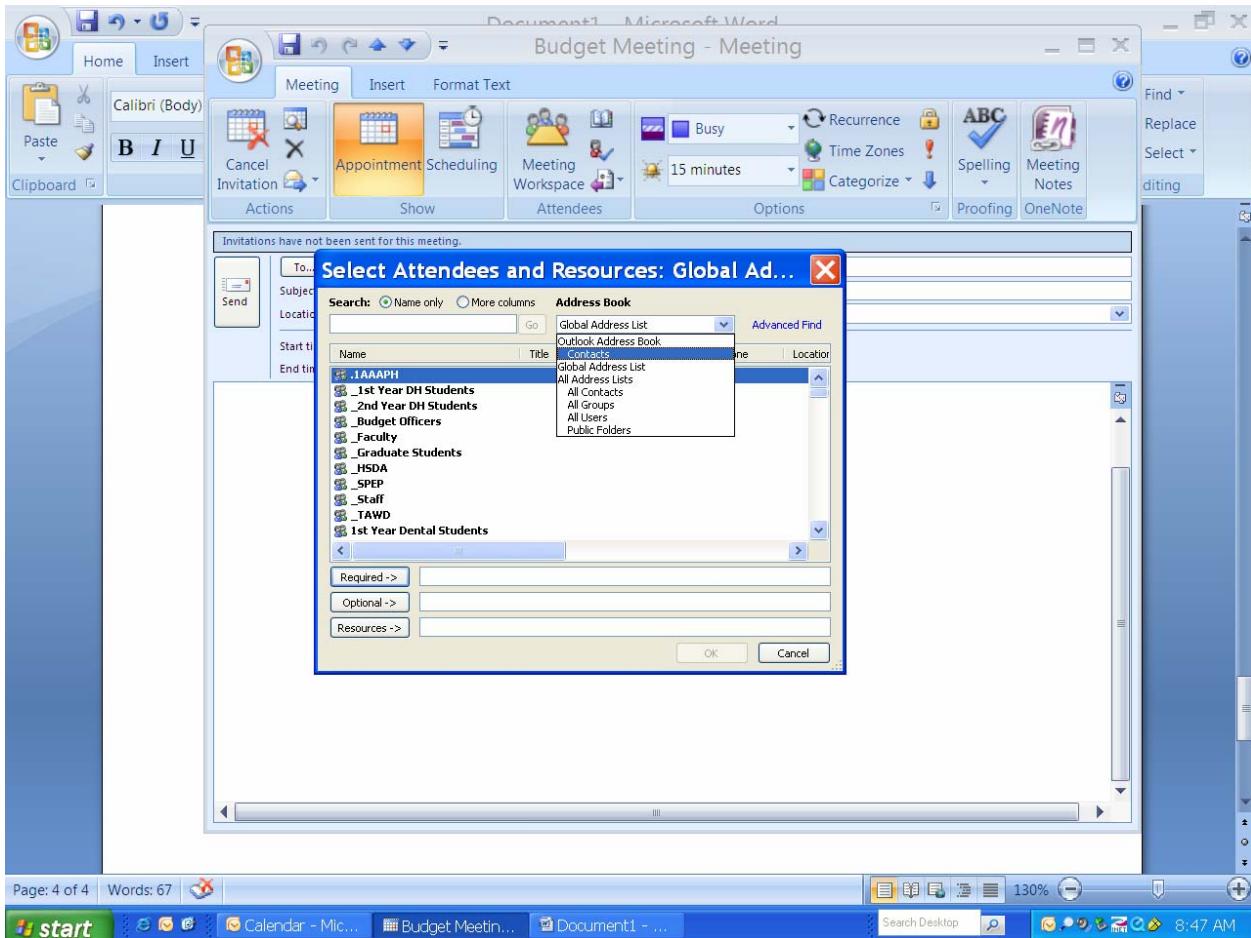


Select the To button and the Address Book will open:

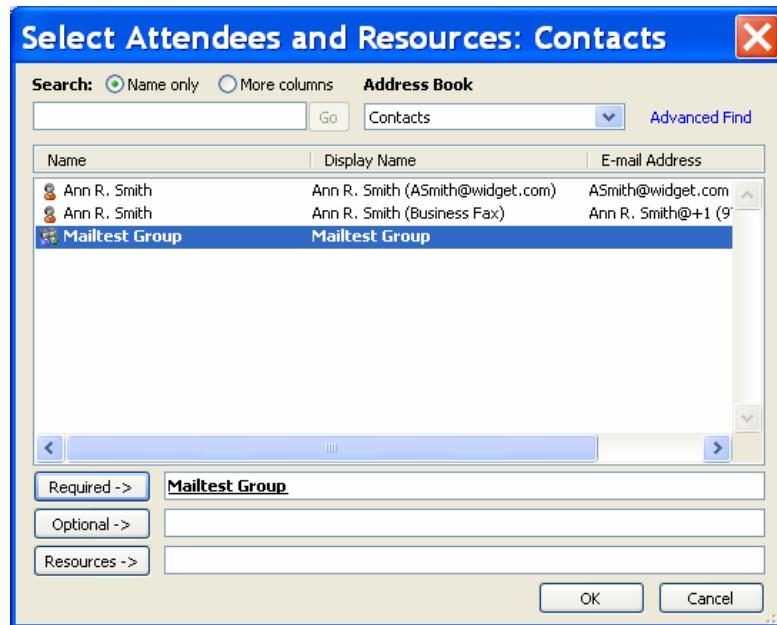


You may select an individual, a small number of invitees, or a Global Distribution Group. You may also change the address book to your Contacts list for your personal Contacts and Distribution Groups, or a

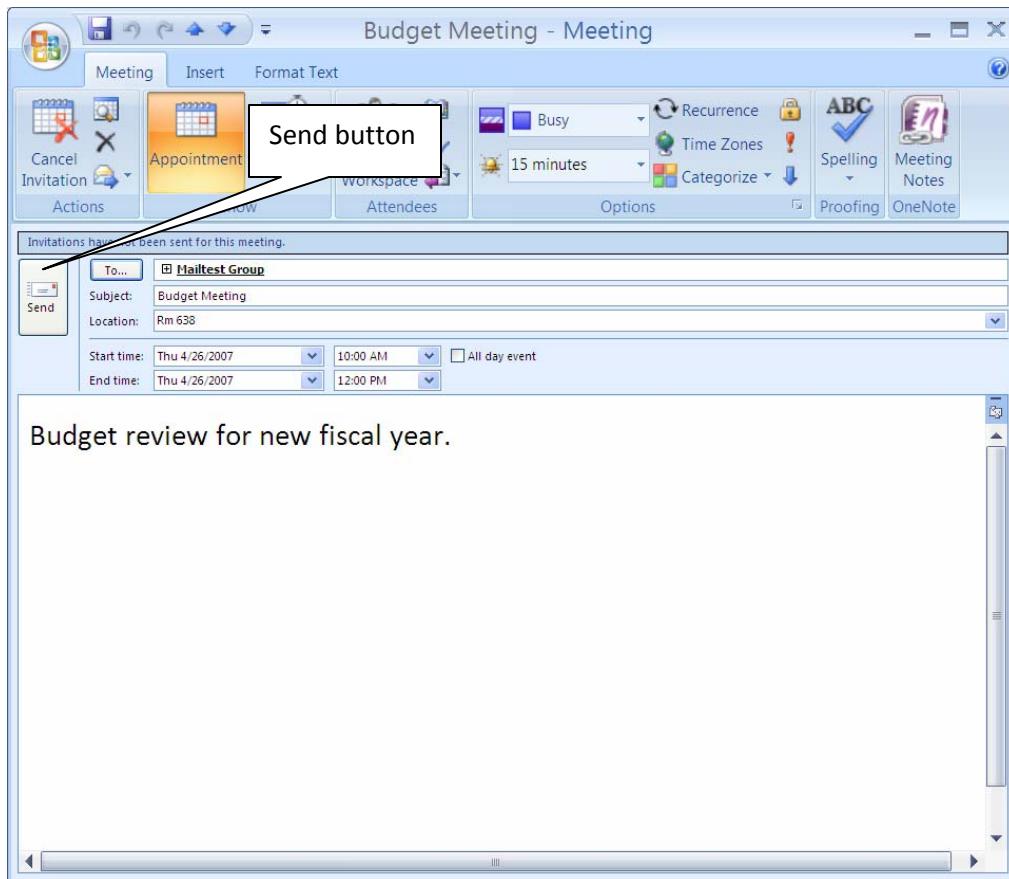
combination of both. Here, let's select the Mailtest Distribution Group we created earlier. Drop down the Address book window and select Contacts.



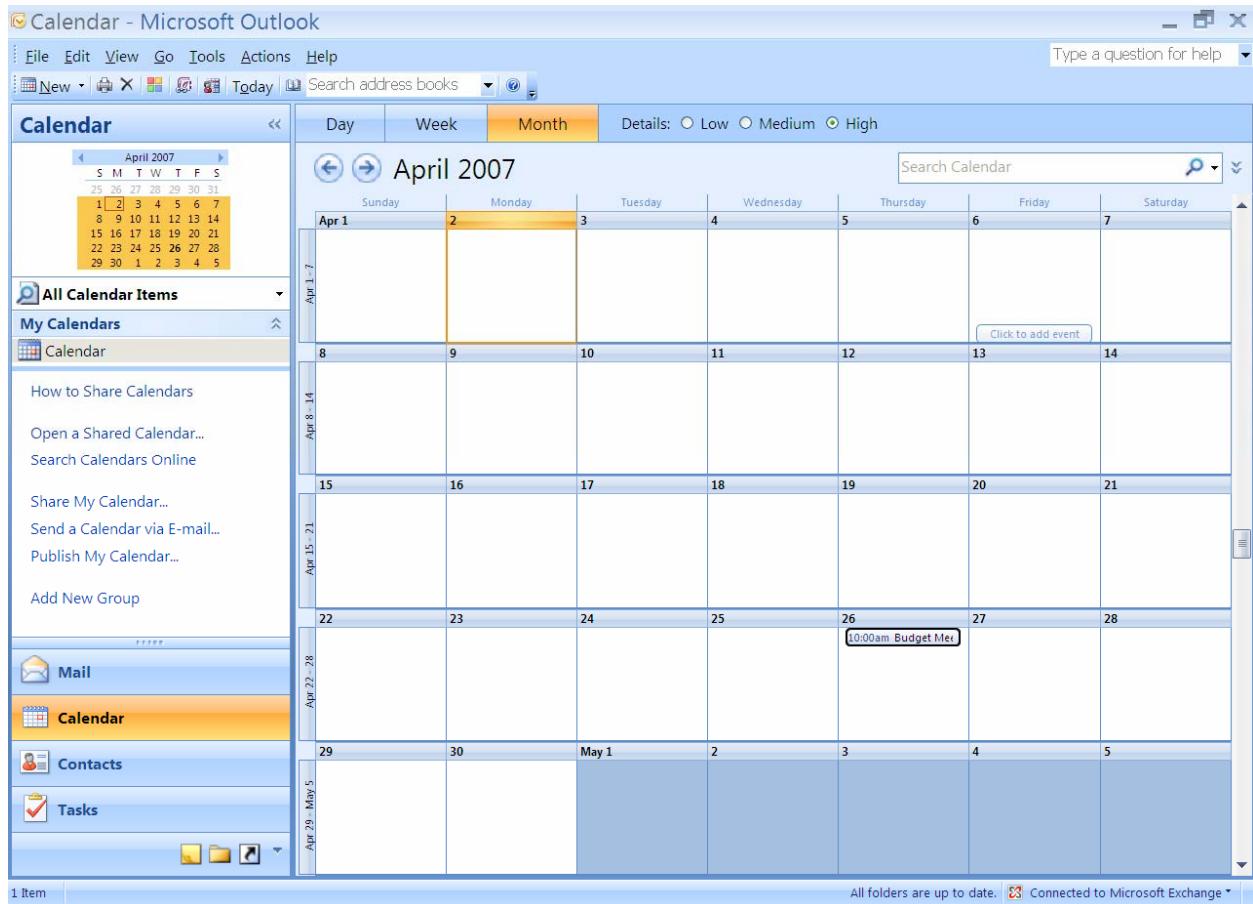
Select the Mailtest Distribution Group, then the Required button, then the OK button:



The following window will appear:

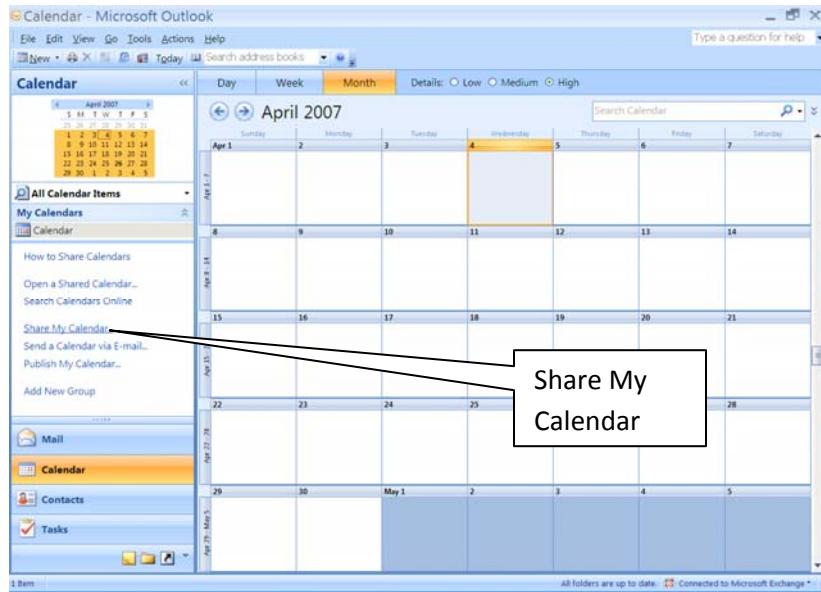


Select Send to send the Calendar invitation to the Distribution Groups' Calendars. The calendar entry now appears on the recipient's Calendar.

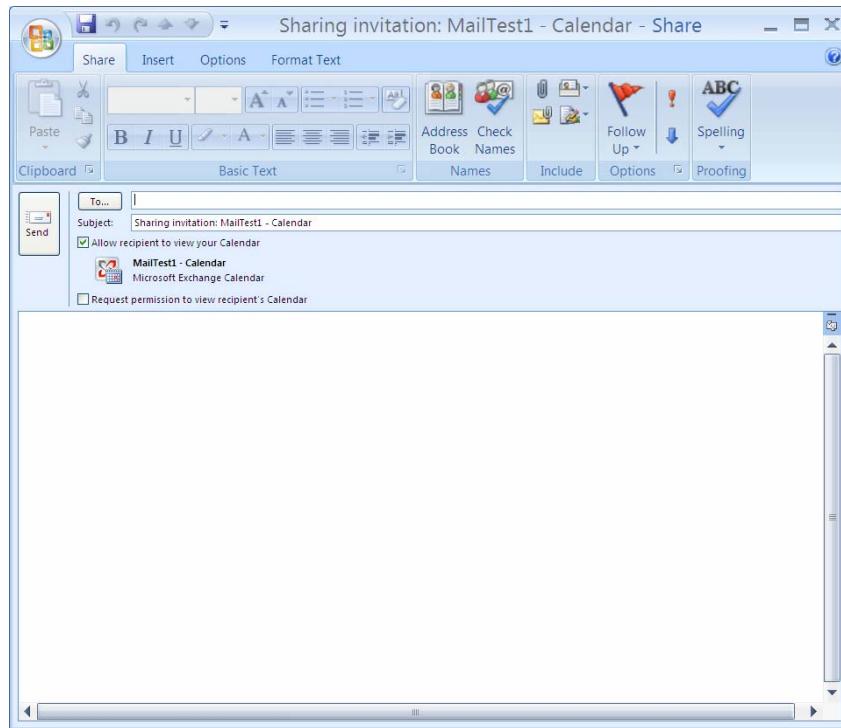


## Sharing your Calendar with others

To share your Calendar with others, in the Navigation Pane, select Share My Calendar.



The following window will appear:



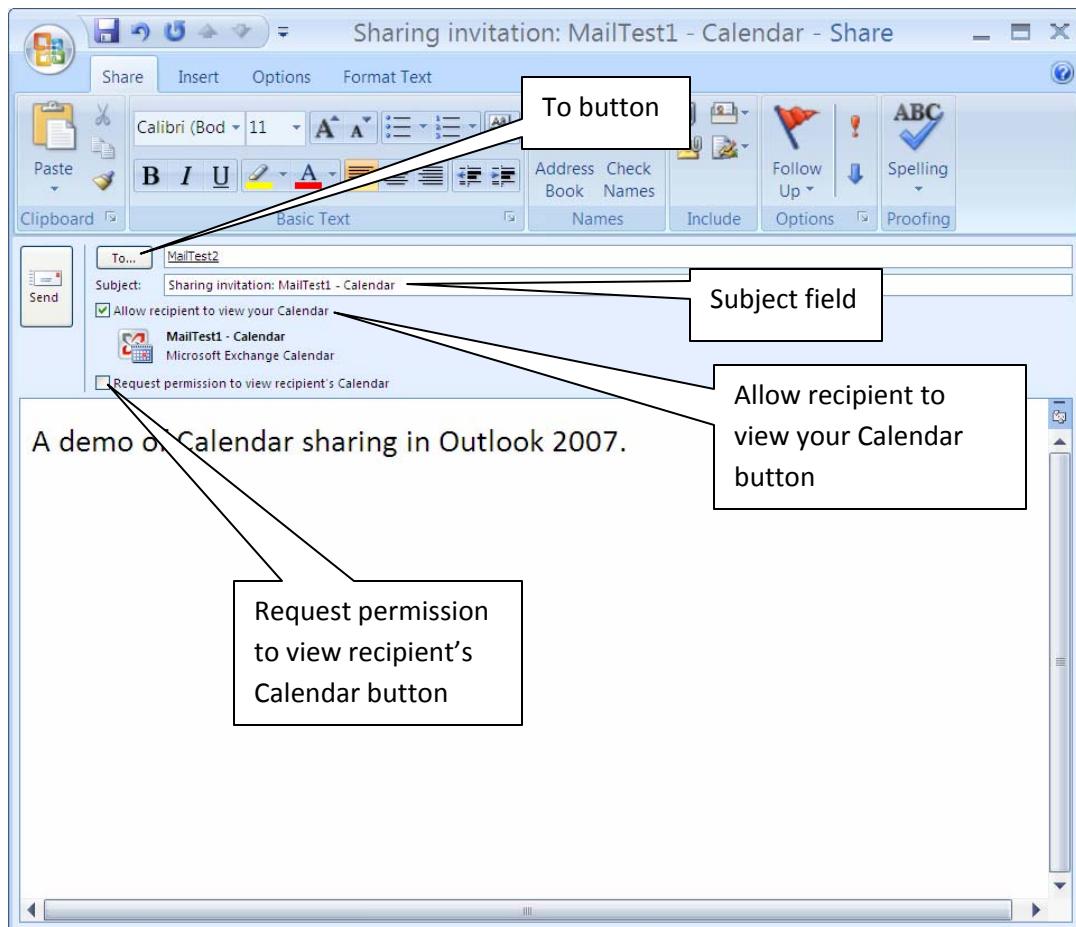
Enter the name of the person to whom you want to grant access to view your Calendar.

Type a subject for your email message.

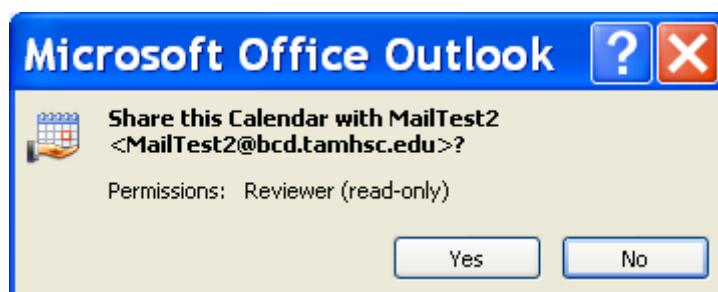
Select the Allow recipient permission to view your Calendar.

You may also select Request permission to view recipient's Calendar if desired. This step is optional.

The completed Share your Calendar form:



Select the Send button. A message box will appear:



Select the Yes button. A second message box will appear:

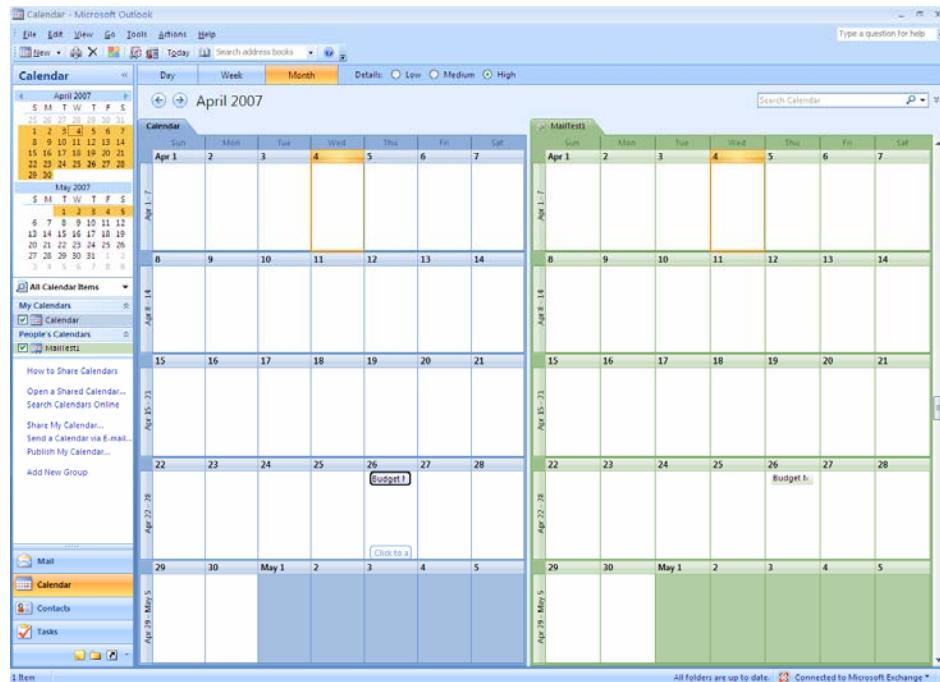


An email message will appear in the invitee's mailbox:

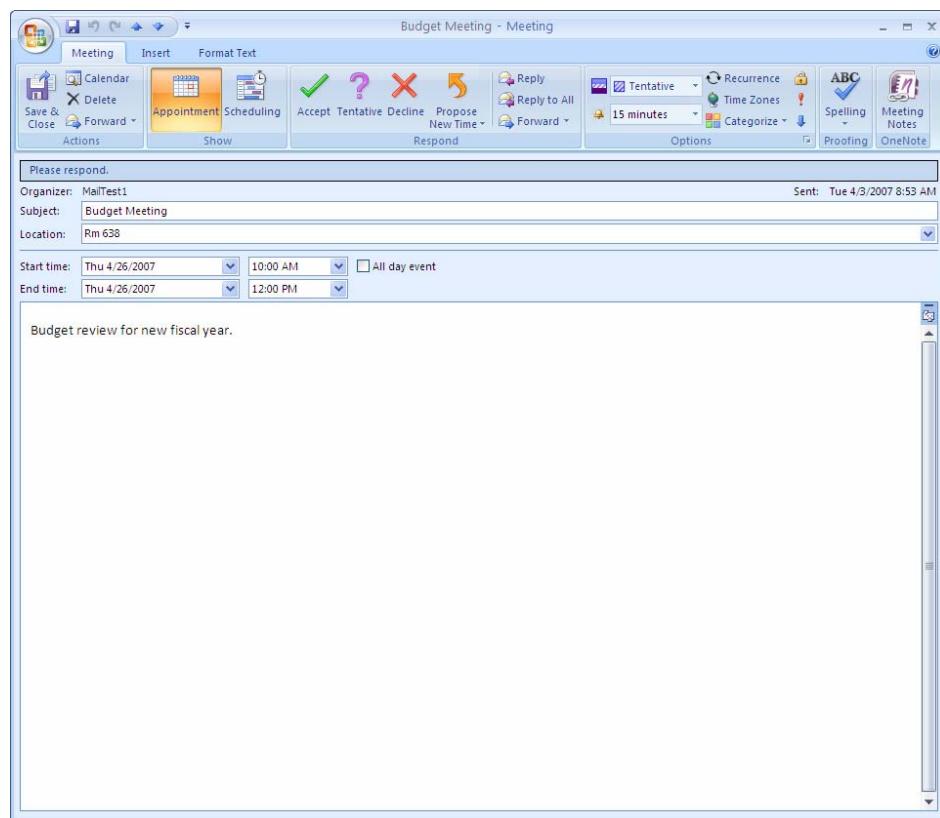
The screenshot shows the Microsoft Outlook 2007 interface. The left sidebar includes "Mail", "Calendar", "Contacts", and "Tasks". The main pane displays the "Inbox" folder, which contains 13 items. One item is highlighted: "Sharing invitation: MailTest1 - Calendar" from "MailTest1" at 8:50 AM. A callout bubble with the text "Open button" points to the "Open" button next to the subject line. The right side features a "To-Do Bar" with a calendar view showing April 2007, a "Budget Meeting" event, and a "Canceled: Budget Meeting" event. The status bar at the bottom indicates "This folder is up to date." and "Connected to Microsoft Exchange".

Select the Open button.

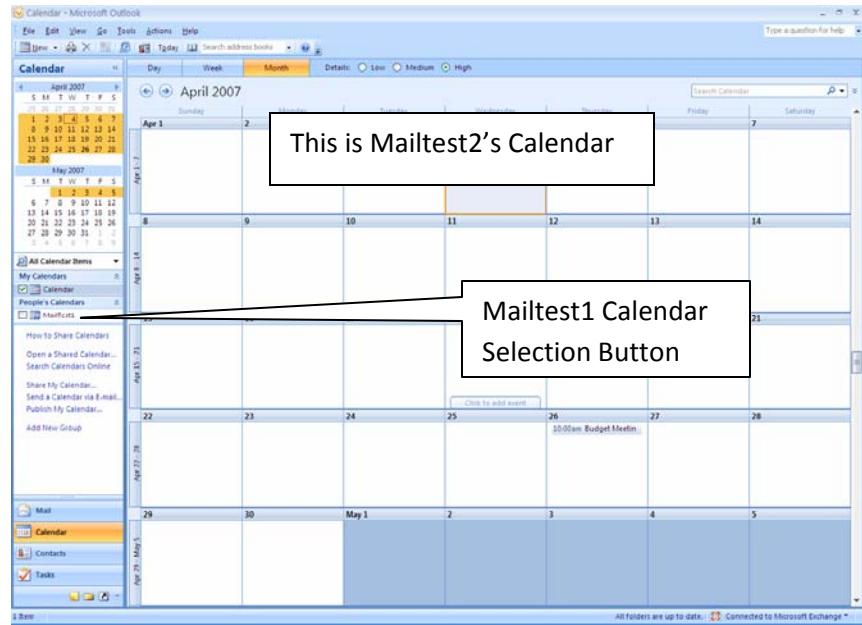
The invitee Mailtest2's Outlook 2007 Calendar program will display the Calendar entry from Mailtest1



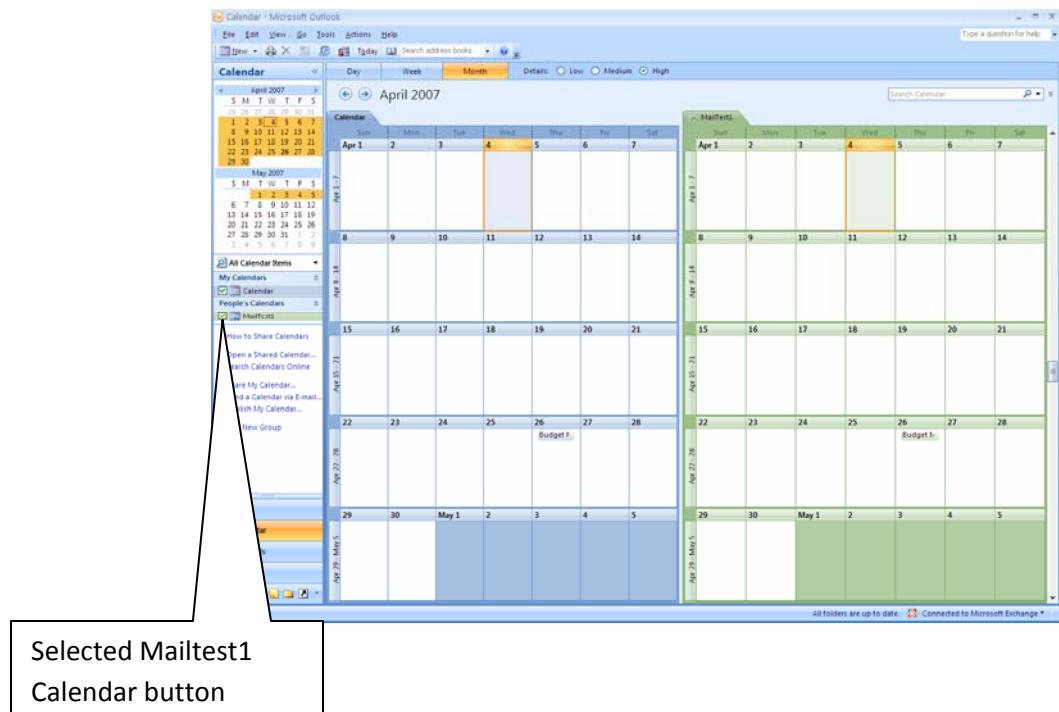
Select the Calendar entry for April 26<sup>th</sup> and the following window will open.



Finally, after closing and opening Outlook 2007, the original Calendar Mailtest1 will be now be listed in the Navigation Pane of Mailtest2.



Select the Mailtest1 Calendar button and the Calendar of Mailtest1 will open.



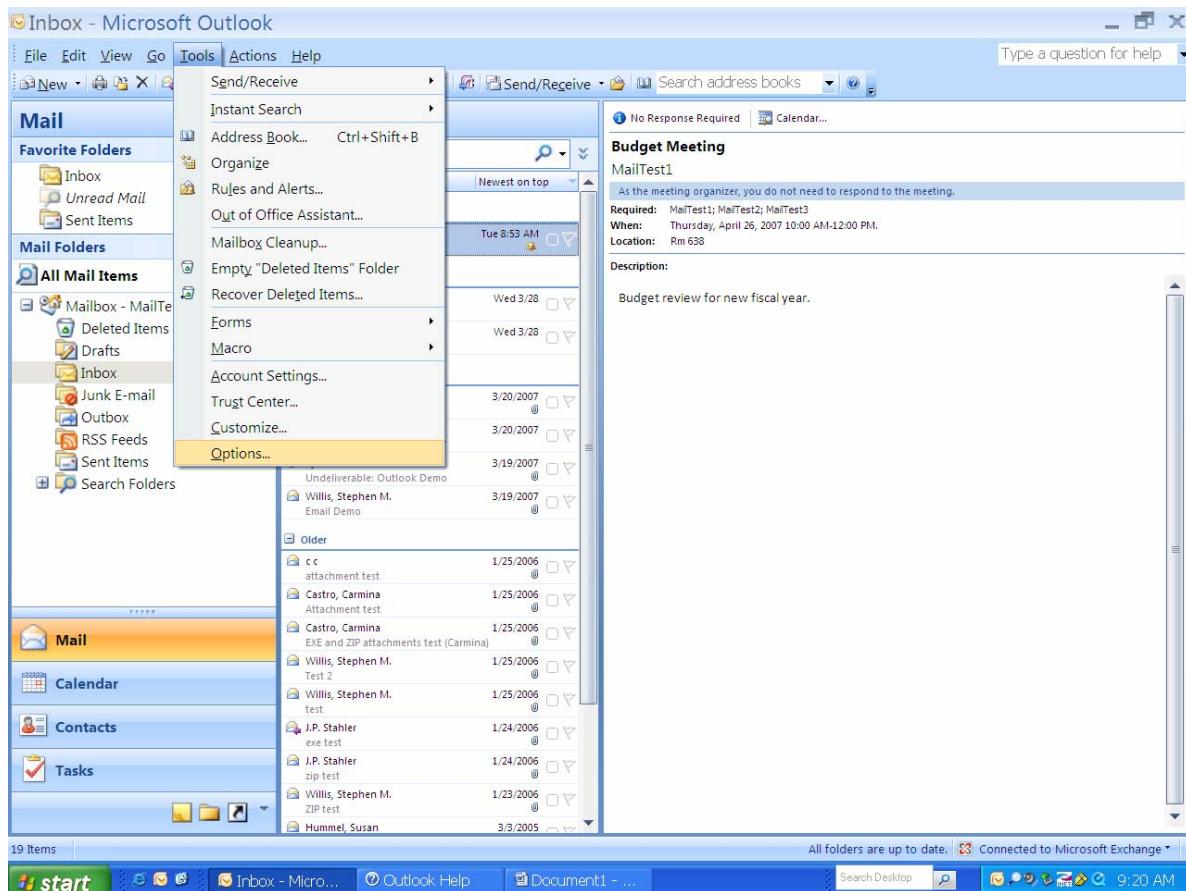
## Allowing Another Person to Manage Your Email and Calendar

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 additional permissions that allow your delegate to read, create, or have full control over items in your Exchange mailbox.

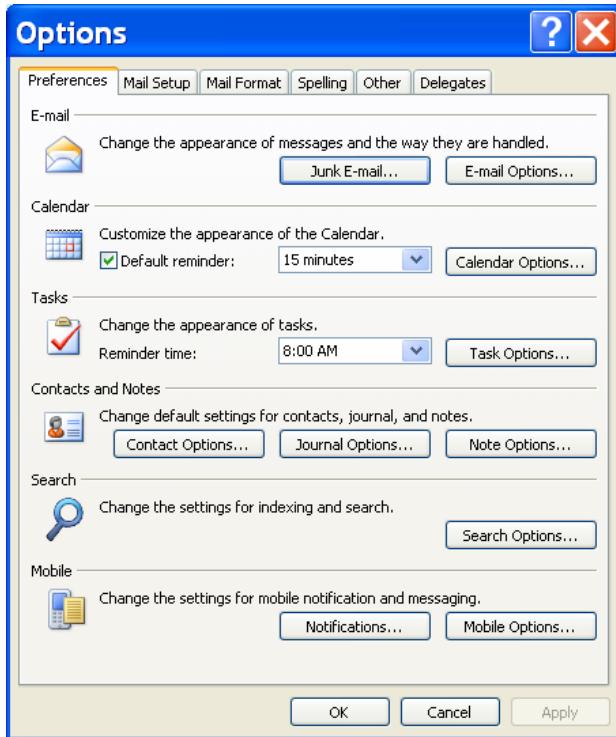
Delegate Access is most commonly used between a manager and his or her assistant, where the assistant (delegate) is responsible for processing the manager's incoming meeting requests or e-mail messages and coordinating the manager's schedule. When a delegate has Send on Behalf permissions, the delegate 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

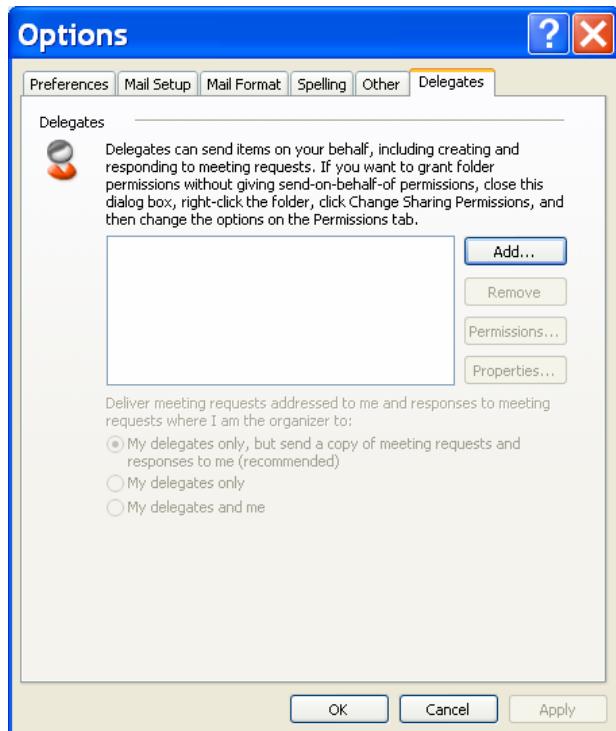
On the Menu Bar select Tools, Options:



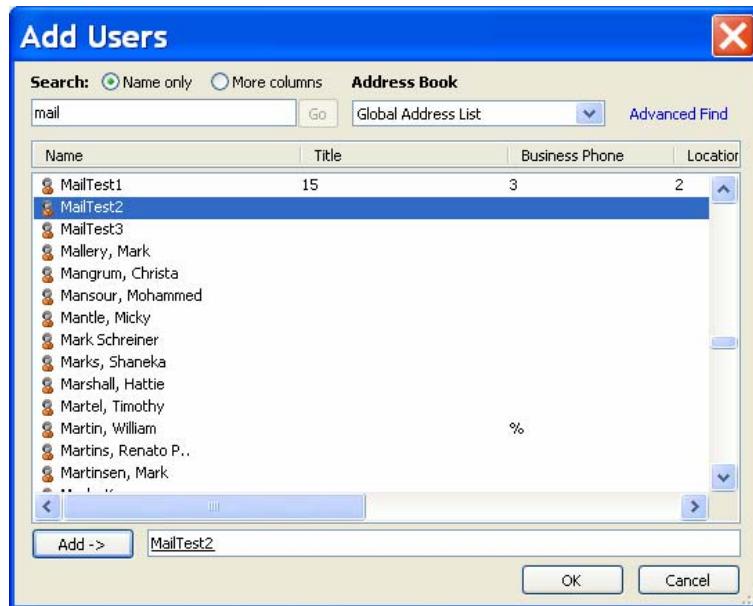
The following Window will open:



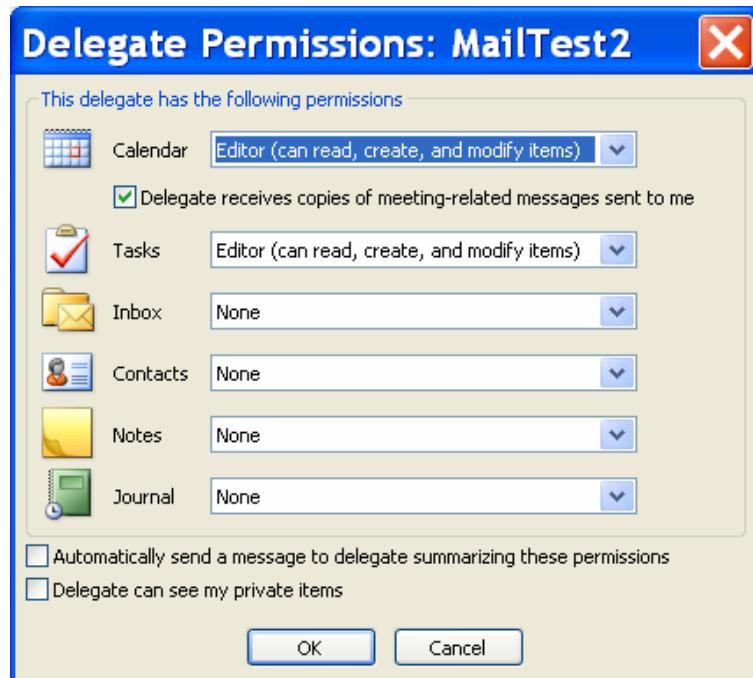
Select the Delegates tab:



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 HSC's address book.**)  
Select the Add button and then the OK button.

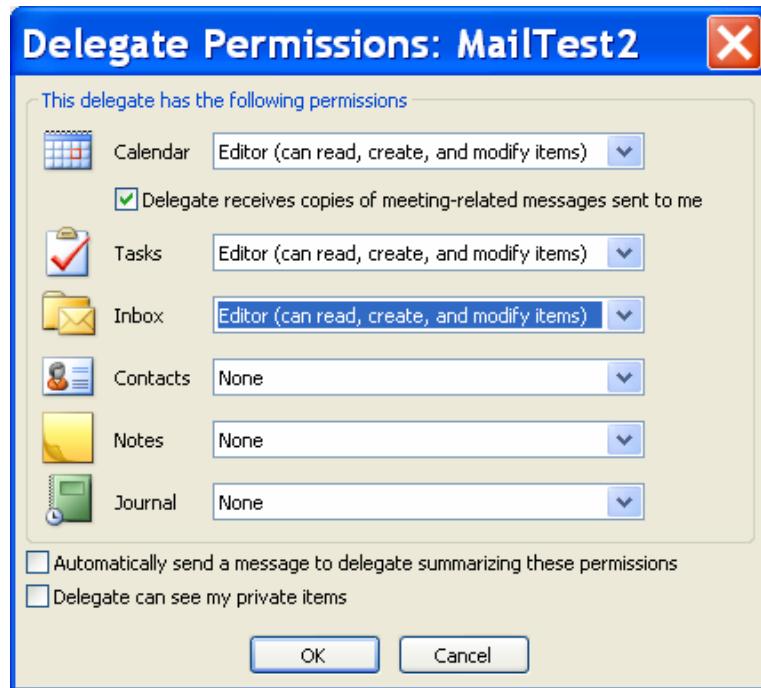


The Delegates Permissions dialog box will open. You can accept the default permissions or select custom access levels for the delegate.



Default Configuration

For example, to allow your delegate to manage your email, select the following permissions:



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, Notes, and Journal folders. You cannot allow access to private items in only one folder.

Select OK. Your delegate now has access to your email box.

This finishes the Basic Outlook 2007 tutorial. Outlook 2007 has a great deal of functionality not covered in this tutorial. Please remember you can get additional information via Outlook Help on the Menu Bar, the Microsoft Outlook web page at <http://office.microsoft.com/en-us/outlook/FX100647191033.aspx?CTT=96&Origin=CL100626971033> and books on Microsoft Outlook 2007 and/or Office 2007 from Microsoft and other publishers.

Thank you,

Office of Information Technology