

# Microsoft Outlook 2007™

## A Beginners Guide

### Contents

Introduction .....	1
Connecting to the ITS Managed PC Facilities Terminal Server .....	1
Opening Outlook.....	2
Using the Calendar.....	2
Creating an Appointment.....	3
A Recurring Appointment/Event.....	5
Changing the Calendar Layout, View and Other Defaults .....	6
Working with the Date Navigator .....	6
Changing the Calendar View .....	7
Other Calendar Defaults .....	7
Organising a Meeting .....	9
Using the Email System .....	13
Adding a Signature .....	13
Tips on Using your Mailbox .....	16
The Reading Pane and AutoPreview .....	16
Arrange by Conversation .....	17
Colour Coding Messages.....	17
Favourite Folders.....	18
For Follow Up Folder.....	19
Blocked Attachments .....	20
Away from the Office .....	21
Using Contacts.....	21
Adding a New Contact .....	22
Current View of Contacts.....	22
Adding an Address from an Email.....	23
Sending an Email to a Contact .....	23
Setting up a Task.....	23
Further Information .....	24
Logging Out.....	24

These notes are specifically for the CSTD Training Course, Introduction to Using Outlook, and are best used in conjunction with this course. Some of the information can be used and applied, by those who are not on the course, to their PCs on campus that also use Microsoft Outlook.

**Note:** This document assumes that you are familiar with using a windowing system (with its icons, menus and a mouse) and know the procedures of pointing, clicking, double clicking, dragging and multi-tasking.

## Introduction

It is assumed that the course attendee knows how to login to a PC that is in a University PC Facility managed by IT Services.

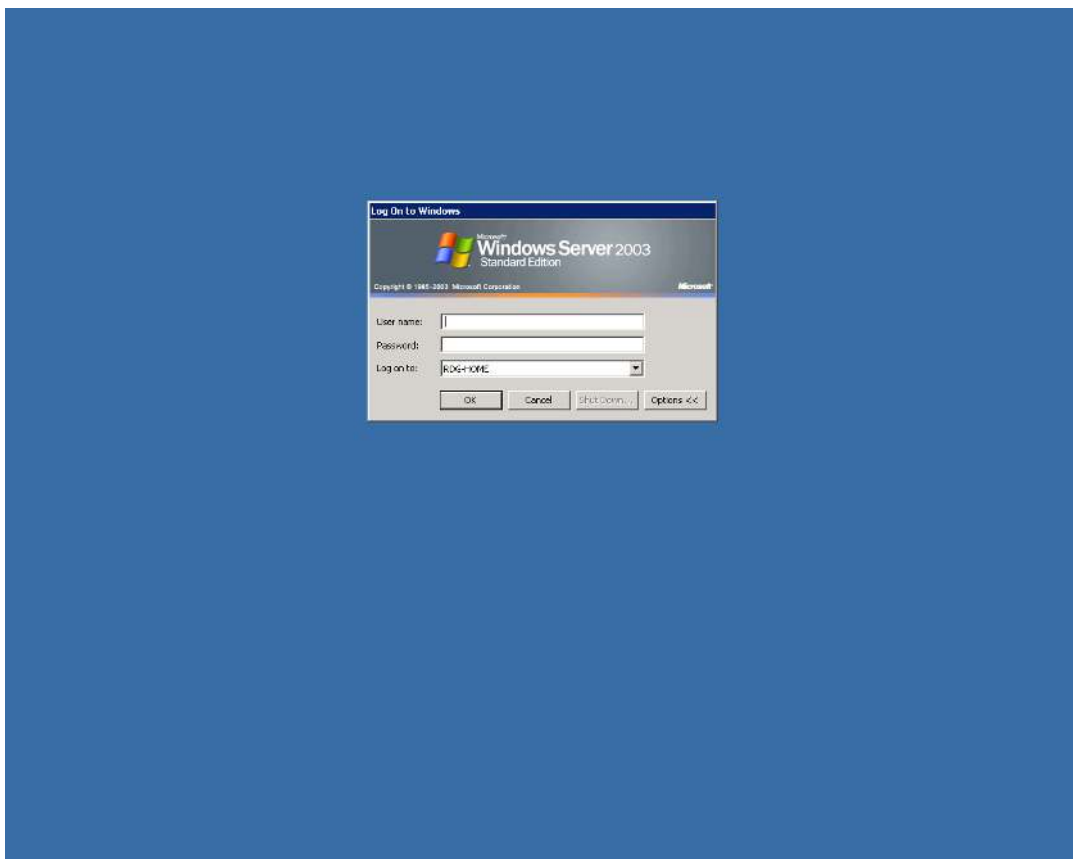
**Please make sure that you login to the PC with your username and password.**

## Connecting to the ITS Managed PC Facilities Terminal Server

To have access to Outlook on Exchange, you are going to connect to the ITS Managed PC Facilities Terminal Server. To do this:

1. Click on **[Start]** in the bottom left-hand corner of the screen followed by **All Programs** and **Connect to the IT Services Terminal Server** (this should be near the top of the list).

The screen will change and it will almost look as if you are logging into the PC again, but in fact you are now logging into the Terminal Server:



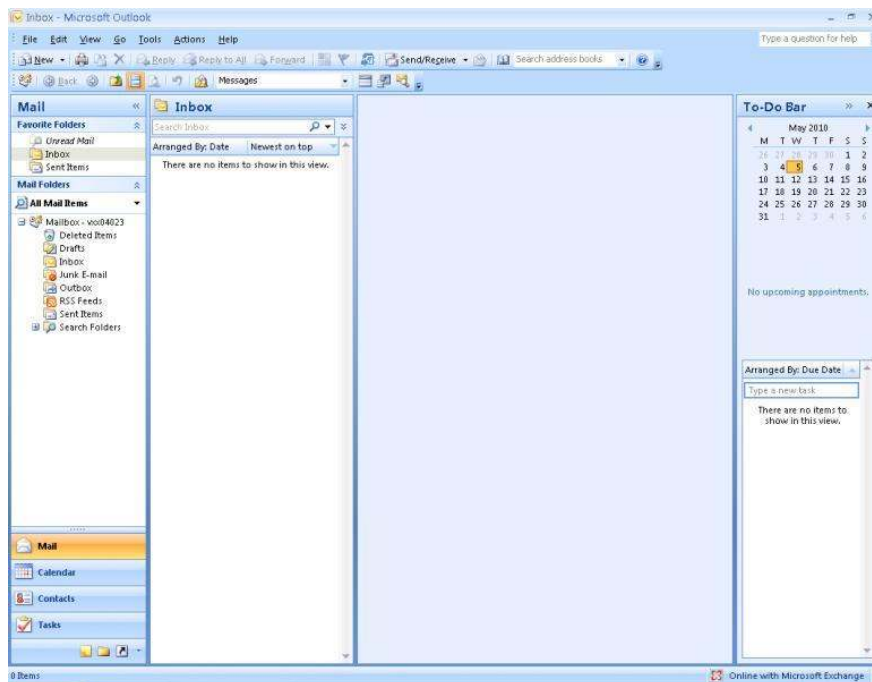
2. In the User name: box, type in the Outlook Exchange Class Training username that you have been given - it will be of the form **vxx040nn**, where **nn is replaced by numbers**
3. Type in the password for your Outlook Exchange Class Training username and click **[OK]** or press **<Enter>**

You should now be successfully logged into the Terminal Server from where you can access Outlook under Exchange.

## Opening Outlook

To open Outlook:

1. Click on the Outlook icon (it is an orange colour with what looks like a clock inside it) in the Quick Launch area or taskbar to the right of **[Start]** in the bottom left-hand corner of the screen (if this is not showing, then click on **[Start]** followed by **All Programs, Microsoft Office** and finally **Microsoft Office Outlook 2007**)
2. Outlook should have already been setup and configured and the opening screen will look similar to below:



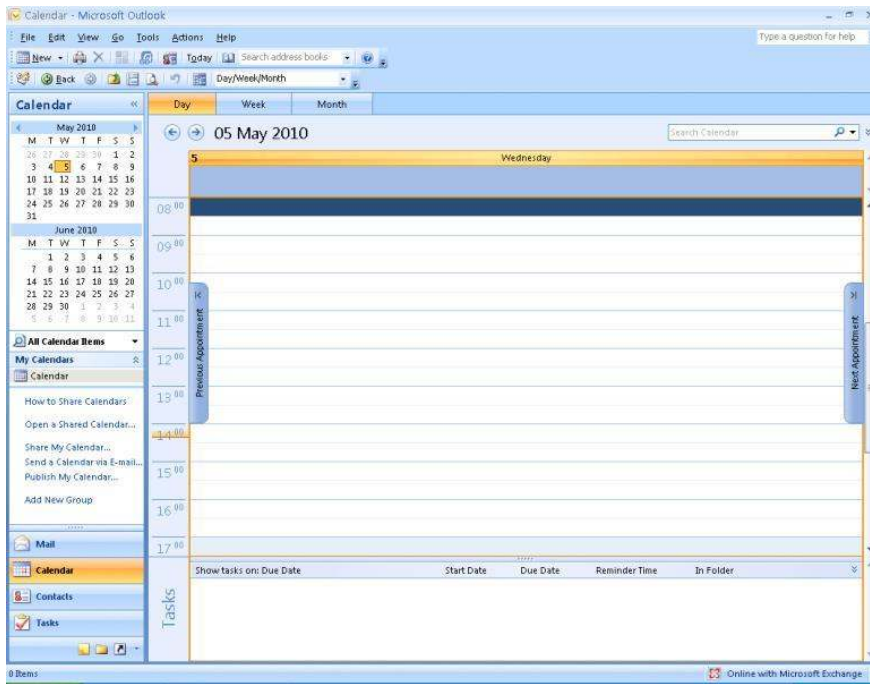
**Note:** On your own PC, the first time you use Outlook you will probably need to follow the notes to [Configuring Exchange Access](http://www.reading.ac.uk/internal/its/help/its-help-email/its-exchange/its-exchange-configure.asp) (<http://www.reading.ac.uk/internal/its/help/its-help-email/its-exchange/its-exchange-configure.asp>).

## Using the Calendar

The Calendar is one of the most useful areas within Outlook. You can use it to keep track of both work and personal appointments, one-off or recurring appointments, give reminders to yourself of important events or dates, and setup meetings with others.

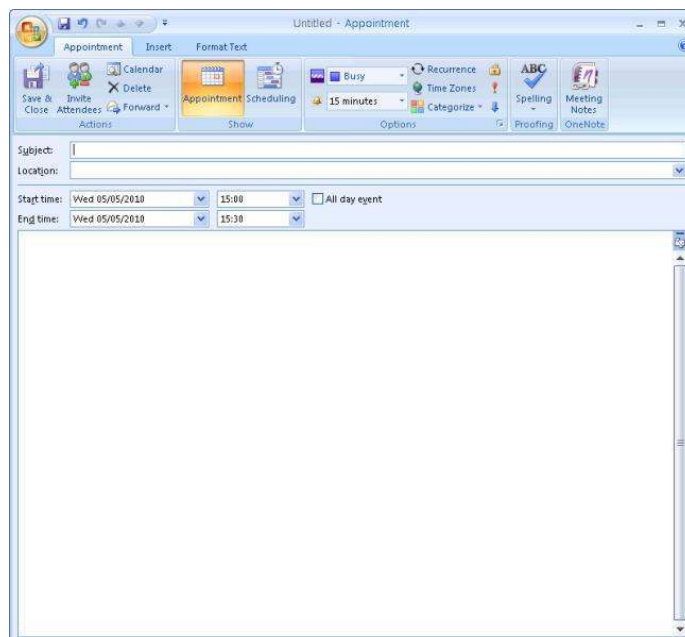
# Creating an Appointment

To get to the Calendar in Outlook, click on the **[Calendar]** button in the Navigation Pane located in the bottom left-hand corner of the Microsoft Outlook window, just underneath the **[Mail]** button. Your screen should look similar to the following:

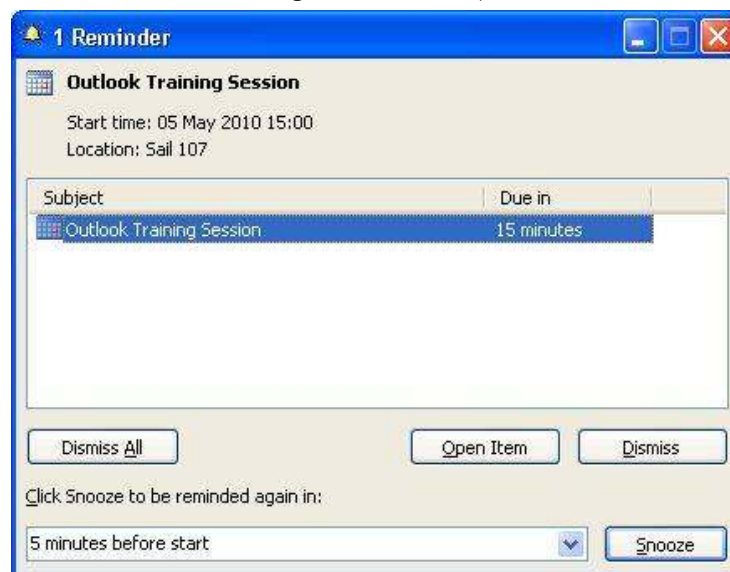


Let's put in an appointment for a bit later today. There are a few ways to create an appointment, but perhaps the easiest/most visual way is as follows:

1. Depending on the time of this training session, click in the main Calendar grid next to either 1100 or 1500 to select the time for your appointment - this selected area on the Calendar (a half-an-hour slot) should go blue (if you want a longer slot/time, just drag down on the mouse to include the next half-an-hour or more)
2. **Right** click on the selected blue area and choose **New Appointment** from the shortcut menu - you should get a window similar to the following:



3. An **Appointment** window will open in which you can enter a subject, location and description, along with other information. For the **Subject**, type in **Outlook Training Session**
4. Move to the **Location** box (either use the mouse or press the <Tab> key next to the letter Q on the keyboard) and type in the name of your training room, e.g. Sail 107 (after you have entered a few appointments in different rooms, you will find that you have a list of rooms to choose from)
5. You should find that the **Start time** and **End time** have already been setup according to your selection earlier, but you can still change these at this point. Note the **All day event** box - clicking this box means that your appointment becomes an all day event, and the start and end time boxes disappear as well as the reminder going to 18 hours before
6. In the large window/area below the End time box is where you can write a further description - put what you like here, or if you can't think of anything, try **This is the CSTD course I booked onto to learn more about using Outlook!**
7. On the **Appointment** ribbon at the top of the window, in the **Options** group, you'll find some useful boxes and icons. The **Show As** box is very useful as it tells not only you, but also other people who might be looking at your Calendar if you are busy or not at this time. The default setting is usually Busy. For this training session, click on the down-list arrow and select **Out of Office**
8. The **Reminder** box allows you to set whether Outlook should remind you of the appointment. This can be very useful, and the default setting is set to remind you 15 minutes before the appointment. Click on the down-list arrow to select a different reminder time, or none, if you want. The reminder will come up later on your screen (assuming you have Outlook still running) as a window similar to below (one option is to snooze it to remind you again later, a bit like what you can do with a morning alarm clock!):



9. You can give an appointment a category (at the same time making it more visible in your Calendar as it will have a different colour) by clicking on the **Categorize** icon and then choosing one of the categories from the list (you can change the default label settings and setup your own ones)
10. Click on the **[Save & Close]** icon at the start of the **Appointment** ribbon - you should find that the appointment is now setup in your Calendar in a different colour with a small vertical purple/mauve bar on the left-hand side, indicating that you're out of the office at that time

**Note:** You can also turn an email message that you receive into an appointment (or meeting) on your Calendar by dragging the message onto the **[Calendar]** button in the Navigation Pane (the

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