

Microsoft Outlook 2007™ A Beginners Guide

Contents

Introduction1
Connecting to the ITS Managed PC Facilities Terminal Server
Opening Outlook
Using the Calendar
Creating an Appointment
A Recurring Appointment/Event
Changing the Calendar Layout, View and Other Defaults 6
Working with the Date Navigator
Changing the Calendar View7
Other Calendar Defaults7
Organising a Meeting9
Using the Email System 13
Adding a Signature13
Tips on Using your Mailbox
The Reading Pane and AutoPreview
Arrange by Conversation
Colour Coding Messages 17
For Follow Up Folder
Blocked Attachments
Away from the Office
Using Contacts
Adding a New Contact 22
Current View of Contacts 22
Adding an Address from an Email
Sending an Email to a Contact
Setting up a Task
Further Information
Logging Out

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:

Log On to Windows
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- 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 <u>Configuring Exchange Access</u> (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:

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🤓 🎯 Back 🛞 🖪 🔚	2 9	Day/Week/Month							
Calendar «	Day	Week	Month						
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How to Share Calendars	13.00	Press						36	
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Open a Shared Calendar	14.00								1
Share My Calendar									ŀ
Send a Calendar via E-mail Publish My Calendar	15 00								1
Add New Group									
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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:

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Save & Invite Close Attendes Actions Show Options Categorize & Spelling Notes Actions Show Options Categorize & Proofing OneNote ubject: Intrine: Wed 05/05/2019 V IS:00 V Ald day egent ing time: Wed 05/05/2019 V IS:08 V	a 2
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- 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!):

1 Reminder	
Outlook Training Session	
Start time: 05 May 2010 15:00 Location: Sail 107	
Subject	Due in
Outlook Training Session	15 minutes
Dismiss <u>A</u> ll	Qpen Item Dismiss
Dismiss <u>All</u> ick Snooze to be reminded again in:	Qpen Item Dismiss

- **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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