Outlook 2007 Basic Training

The Outlook 2007 Screen

**Navigation Pane**

- **Mail**: Contains mail related folders like inbox and sent items folder. Use the Favorites section at the top of the pane for easy access to frequently used folders.
- **Calendar**: Lets you view and schedule appoints, events and meetings, and compare calendars side by side.
- Tasks – Organize to-do lists, track task progress and delegate tasks.
- Contacts – Store addresses, phone numbers, and e-mail addresses.

**E-mail Basics**

**E-mail Basics: View Tab**

**Changing view of Reading Pane**

You can change the view of your Reading Pane on the screen, moving it to the right or bottom of the screen. You can also turn it on or off.

1. Click **View** in the **Menu Bar**.
2. Click **Reading Pane**.
3. Click the **Right**, **Bottom** or **Off**.

![Changing view of Reading Pane](image)

**Changing view of Navigation Pane**

You can change the view of your Navigation Pane two ways as well; Normal or Minimized. You
can also turn the Navigation Pane off.

1. Click View in the Menu Bar.
2. Click Navigation Pane.
3. Click Normal, Minimized or Off.
4. You can also choose whether you want the favorites folders to show.

Changing view of To-Do Bar

The To-Do Bar provides a Date Navigator, Appointments and Task List. You can select which features of the To-Do Bar are visible and choose between Normal and Minimized views. You can also turn the To-Do Bar off.

1. Click View in the Menu Bar.
2. Click To-Do Bar.
3. Click Normal, Minimized or Off.
4. Click Date Navigator, Appointments or Task List to toggle their visibility.
E-mail Basics: Creating E-mails

Sending an E-mail

1. Click **New** in the **Menu Bar** and **select Mail Message** in the drop down window. The new e-mail window will open.
2. Type the address of the recipient in the To... field.
3. Type an address in the Cc... field if you wish to send a copy of the message to a third party.
4. Type a subject matter in the Subject field.
5. Type your message in the large text box.
6. Click Send.

Auto-complete and the Global Address List

Outlook has an auto-complete feature that attempts to predict what e-mail address you're typing based on the addresses you've e-mailed in the past.

1. Auto-complete appears as soon as you start typing an address in the To... field.
2. The e-mail displayed will be Outlook's best guess at what address you are typing. It will refine as you input more characters.
3. Hit enter on your keyboard when the correct address is displayed and auto-complete will fill in the remaining characters.

The Global Address List is a college-wide contact list of Gavilan employees. It can help you
find contact information and e-mail addresses, and can be accessed from the new e-mail window. We will discuss the Global Address List in greater detail later in this guide.

1. Type an identifying piece of information, such as a last name, into the To... field. You do not need to enter a full name, for example entering “Jorg” will bring up “Jorgensen” and “Jorgenson”.

2. On your keyboard, hold the Ctrl key down and hit the K key.
3. The Check Names window will open. This window lists all matches from both your personal contacts and the Global Address List.
4. Click the record for the person you want to message.
5. Click .
6. An e-mail address for the person you want to message will appear in the To... field.

Working with Folders

Folders provide a useful way to manage your messages. They appear in the navigation pane.
You can create folders in any structure that suits your needs.

1. **Right click** on the **folder** that will house your new folder.
2. **Click New Folder** in the drop down menu. The Create New Folder window will open.

3. **Type** the name of your new folder in the **Name** field.
4. **Click** in the **Select where to place this folder** field if you wish to change where your folder will be located.
5. **Click OK**.
6. The new folder will appear in the location you indicated.
7. You can drag and drop messages directly to this or any folder.

**E-mail Basics: Signatures**

**Creating a Signature**

Outlook 2007 allows you to create custom signatures for your messages. You may create multiple signatures to apply to messages as you see fit. Your first signature is automatically applied as your default signature and will appear on your outgoing messages.

1. **Click New** in the **Menu Bar** and **select Mail Message** in the drop down window. The new e-mail window will open.
2. **Click Signature** in the New E-Mail menu.
3. **Click Signatures...** in the drop down menu. The Signatures and Stationary window will open.

![Signatures Window](image)

4. **Click New** to create a new signature.
5. **Type** the name of your signature in the **New Signature** window that appears.
6. **Click OK**.
7. Type your desired signature in the text box below.
8. Click Save to save your signature.
9. Add additional signatures or Click OK to exit.
Inserting a Signature

If you have created more than one signature, you can select which one you wish to use while composing a new message.

1. **Open** the New E-Mail window.
2. **Click Signature** in the New E-Mail ribbon. A list of the signatures you have created will appear in the drop down menu.
3. **Click** on the **signature** you wish to use.
4. The signature will appear in at the bottom of your message.
Calendar Basics

Outlook 2007 has a robust calendar feature for managing your time and scheduling meetings with other Gavilan users.

Access the Outlook Calendar

1. Click on Calendar in the Navigation Pane. The calendar will appear in the Outlook Screen.

Adding an Appointment

There are two ways to add an appointment to your calendar:
1. Click **New Appointment** in the **Menu Bar**.
2. Select **Appointment** in the drop down menu.

   ![Menu Bar with Appointment and Meeting Request options]

   **OR**

   Double click an area on your calendar.

   ![Calendar with Double Click highlighted]

   The Appointment window will open.

3. Type a subject for your appointment in the **Subject** field.
4. Type a location for your appointment in the **Location** field.
5. Set a start and end date and time for your appointment.
6. Type a note for your appointment in the large **text box**.
7. **Click** in the **Reminder** field in the ribbon to set a reminder for your appointment. Reminders can be scheduled for five minutes to two weeks before the appointment.

8. **Click Save & Close** in the ribbon. Your appointment will appear in your calendar.
Adding a Meeting Request

Meetings differ from appointments in that a meeting allows you to invite attendees. When you create a meeting request, invited users will receive an e-mail invitation to which they can respond. You will receive notification when users accept, decline or propose a new time for the meeting.

Invite users to the meeting by following the same steps as adding addresses to a mail message; auto-complete attempts to predict what e-mail address you’re typing based on the addresses you’ve e-mailed in the past, while the Global Address List provides a campus-wide contact list of Gavilan employees.

There are two ways to access the New Meeting window.

1. **Click on** New Items **in the Menu Bar.**
2. **Click Meeting Request** in the drop down menu.

![New Meeting Window](image)

The New Meeting window will open.

3. **Type** a subject for your meeting in the **Subject** field.
4. **Type** a location for your meeting in the **Location** field.
5. **Type** a note about your meeting in the large **text box**.
6. **Click** in the **To...** text box and begin typing the name or address of an attendee. Auto-complete will suggest a recipient. **Hit Enter on the keyboard** to accept a suggestion.

    From...  
    To...  
    Cc...  
    Subject:  
    Mimi Arvizu, <marvizu@gavilan.edu>

7. **Type** the name of an attendee in the **To...** field. **Hit Ctrl-K** on your **keyboard** and **select** the attendee you want from the list that appears. **Click OK**.
8. *Selected* attendees will appear in the **To...** field.
9. **Select** a date and time for the meeting.
10. **Click Send** to send the invitation. Attendees receive an e-mail invitation to the meeting, and you will be notified if they accept or decline.

**Contact Basics**

**Global Address List vs Personal Address Book (Contacts)**

You have two main ways of getting access to and storing contacts. You have access to a Global Address List that contains everyone who has a Gavilan e-mail address and a Personal Address Book for contacts inside or outside of the College. To access the Global Address List:

1. **Click Address Book** on the right side of **Menu Bar**. The Address Book window will open.
2. **Type** a name into the **search** box. As you type, the search function will display possible matches.
3. **Click** the **name** of the person for whom you are looking. A new window will pop up with this persons' contact information.

4. **Click Add to Contacts** to add them to your personal address book. A new window will pop up.
5. **Click Save and Close.** They will appear in your Personal Address Book.

To Access your Personal Address Book (Contacts):

<table>
<thead>
<tr>
<th>First</th>
<th>Last</th>
<th>Company</th>
<th>Title</th>
<th>Department</th>
<th>Office</th>
<th>Assistant</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demo</td>
<td>Demo</td>
<td>ProdCollaborate2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
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<td>Demo</td>
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<td>ProdCollaborate2</td>
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<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

**Contact**

**Format Text**

**Insert**

**Save & New**

**Delete**

**Show**

**All Fields**

**Certificates**

**Activites**

**Email**

**Meeting**

**Call**

**Communicate**

**Demo ProdCollaborate2**

**Demo ProdCollaborate2, Demo**

**ProdCollaborate2, Demo**

**Full Name**

**Company**

**Job title**

**File as**

**Internet**
1. Click **Contacts** in the **Navigation Pane**. Your contact list will open on the Outlook screen.

![Navigation Pane](image1.png)

2. You can add new contacts, add contact groups, delete contacts, e-mail contacts and invite contacts to meetings from this screen.

**Tasks Basics**

The tasks function of Microsoft Outlook is a way to keep track of daily, weekly, monthly and even yearly “to do” items. You can use tasks to help remind you of once-in-a-while tasks that you must get done, or recurring tasks that happen all the time.

**Creating Tasks**

1. Click **New** in the **Menu Bar**.
2. Click **Task** in the drop down menu.

![Menu Bar](image2.png)

3. The New Task window will open. In this window you can:
- Enter a subject for the Task.
- Enter a start and end date.
- Enter a status.
- Assign a priority level.
- Add a reminder.
- Set the recurrence of the Task.
- Set a follow-up reminder.
- Assign the task to someone else.
- Categorize the task.
- Type notes for the task.

4. When you are done filling in the New Task window, **Click Save and Close**.

**Viewing Tasks/To-Do List**

Your new task is now visible in two places:

1. The To-Do bar lists Tasks on the right side of the outlook screen.
2. Double **click a Task** in the To-Do bar view and **edit the Task**.
OR

1. *Click Tasks* in the **Navigation Pane**. This will open the Tasks view of the Outlook screen.

2. You can view the details of a Task in the Reading Pane.