Using Microsoft Outlook 2007

Starting MS Outlook

To start MS Outlook double click on the shortcut on the **desktop** or on the **Start Menu**

You will be presented with a logon prompt enter your **email address** as the **username** and then enter the **password** you were given when the Hosted email was installed.

Once the main window opens your emails should start to arrive, if you do not receive any emails after a couple of minutes check to see if Outlook is online, check in the bottom right of the Outlook window and you should see the following.

If your Outlook displays one of the messages below then follow the resolution in the following table.

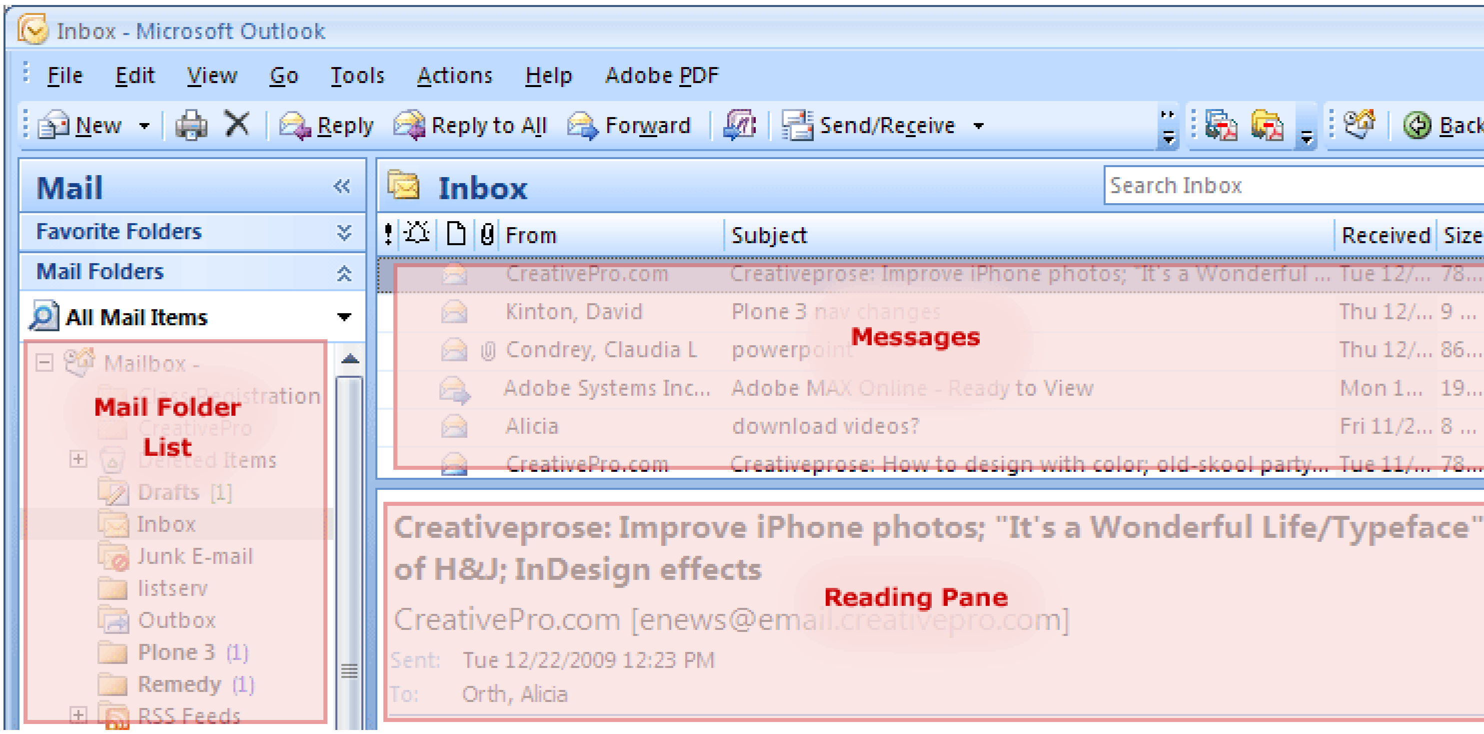
Disconnected
Need Password

Error Message	Resolution
Disconnected	You are not connected to the internet, check to see if you can browse to a website for example www.bbc.co.uk
Need Password	You have not entered your password, click on the down arrow next to the message and select **Type exchange password and connect**

Navigating the Inbox

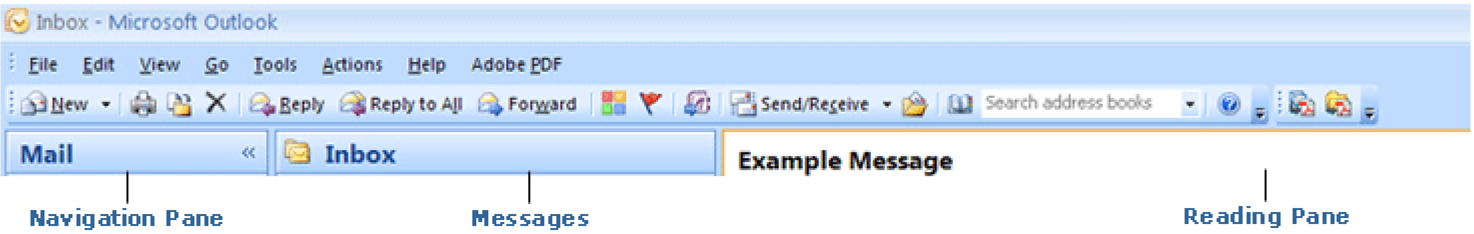
The Inbox: Panes & Bars

Outlook enables you to customize the way mail is presented by simply choosing **View** (from the top menu bar) and then **Current View**. In the example below, the current view is the standard "Messages" view. We've also chosen to position the **"Reading Pane"** underneath messages (see "Positioning the Reading Pane" below for more information). Although your Outlook screen may not look exactly like the screen below, the basic concepts are still the same.



- The **Mail Folder List** (far **left**) allows you to navigate through your various mail folders and view their contents.
- Your **Messages** (**center top**) displays the name of the selected folder (in this example it is the Inbox), and a list of messages it contains.
- The **Reading Pane** (**center bottom**) shows the text of a selected email message.

Positioning the Reading Pane



In Outlook the Reading pane can either be displayed to the right of the Messages pane or under it.

If you wish to change this display setting, go under View > Reading Pane. Select 'Bottom' or 'Right.'

Change the Size of Text in the Reading Pane

If you are experiencing problems reading a message and wish to enlarge the font size for visibility purposes you can make the text or font in the Reading pane larger or smaller by using the scroll wheel on your mouse.

Click in the Reading Pane, press CTRL, and roll the scroll wheel. Rolling the wheel away from you makes the text bigger, rolling it towards you makes the text smaller.

Creating and Addressing Emails

Composing a New Email

- To compose a new email, click the **New** button  on the Standard Toolbar. A blank 'Message' window appears.
- In the field next to the '**To...**' box, type in the e-mail address of the person you wish to send mail to; or, click the '**To...**' button to search for contacts in the Directory.
- Clicking '**To**' adds a selected person as the primary recipient of your e-mail, and '**Cc**' (Carbon copy), adds a selected person as a secondary recipient.
- Enter the subject of the email in the **Subject** box, then type the body of your message in the text box below.

Addressing Email

- To add a contact from the Directory, click the '**To...**' button. In the Select Names window that pops up, enter the name of the person you wish to send mail to in the Search box in the format of **Lastname, Firstname** (eg: Doe, John). Make sure the Address Book is set to "**Global Address List**."

  - Alternatively, you can type the name of the person you are searching for in the **To...** field and then click on the **Check Names** button (or **Alt + K**) to find that person's email address.

Adding a BCC (Blind Carbon Copy) Field

- Bcc is short for Blind carbon copy. If you add a recipient's name to this box in a mail message, a copy of the message is sent to that recipient, and the recipient's name is not visible to other recipients of the message. If the Bcc box isn't visible when you create a new message, you can add it. The option to send a Bcc is under the Options tab in the Ribbon of the Compose Mail screen. Go to **Options > Show Bcc**. The field will appear under Cc...

Adding Attachments

- To add an attachment to an e-mail message, click **Attach File** from the **Include** group on the Ribbon (note: you must be on the default Message tab of the ribbon in order to see this). In the Insert File dialog box, browse to and select the file that you want to attach, and then click **Insert**.
- An alternative way of adding an attachment is to click on the **Insert** tab on the Ribbon and select **Attach File** (other attachment types are also available).
- You can attach multiple files simultaneously by selecting the files and dragging them from a folder on your computer to an open message in Outlook.
- If you wish to remove an added attachment simply click on it once in the **Attached** field to highlight it and then hit the delete key on your keyboard.

Personalizing Mail with Signatures

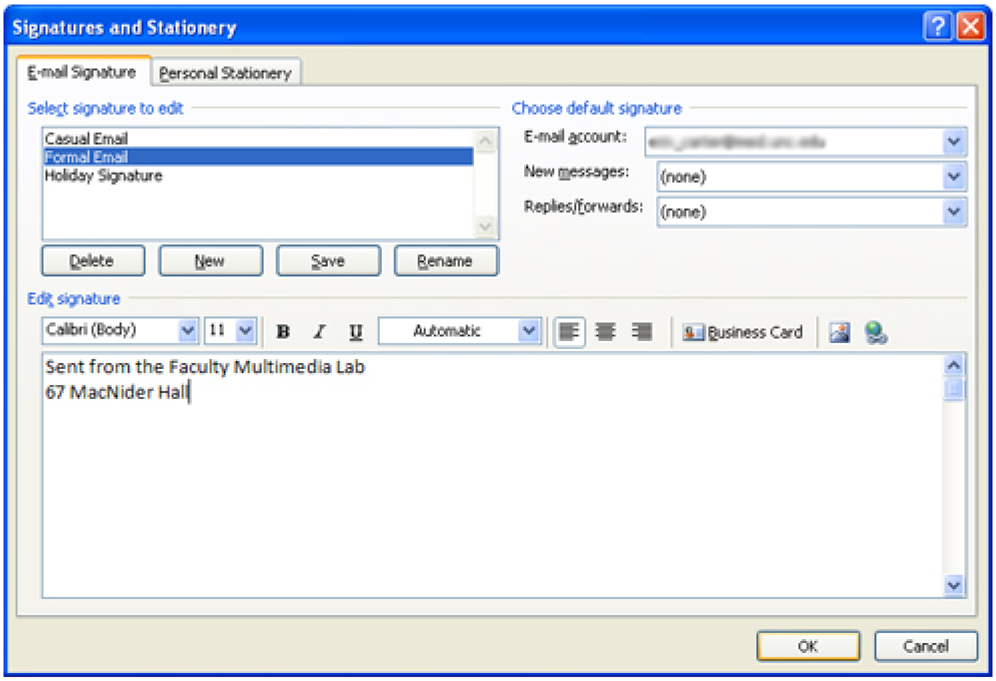
A signature is a block of text appended at the bottom of an e-mail message often containing the sender's name, address, phone number, disclaimer or other contact information. You can use Outlook's Signature feature to add a personal signature to all of your messages so you don't have to repeatedly type the same information in all of your emails.

You can create as many signatures as you'd like. You can also configure Outlook to automatically add a signature to outgoing messages, or you can manually add the signature whenever it's needed. You can even create custom signatures for different types of customers.

Create a Signature

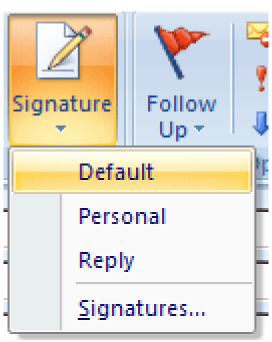
1. Click **Tools**, then **Options**. This will open the Options dialog box.
2. Click on the **Mail Format** tab, and then click on the **Signature** button, about 3/4 of the way down the dialog box. This will open the Signatures and Stationery dialog box.
3. Type a name for the signature, and then click **OK**.
4. In the Edit signature box, type the text that you want to include in the signature. To change fonts or font sizes, add bold or italics etc, simply select the text and then use the formatting buttons and drop down boxes above the text area.
5. Define which signature to use in the **New Messages** and the **Replies/Forwards** fields.

6. Click **OK** when you are finished.



Insert a Signature Manually

In the Ribbon of a new message, click the **Signature** button, and then select the signature you wish to use.



Remove an Automatic Signature from a Message

In the body of the message, select the signature, and then press the **Delete** key on your keyboard.

Setting an Out of Office Message

To create an automatic reply, notifying senders that you are out of office, use the Out of Office Assistant wizard by going to **Tools > Out of Office Assistant**.

- When the Out of Office Assistant comes up, select '**Send Out of Office auto-replies**.' Check the '**Only send during this time range**' box, and select the dates (start and end) when you will be out of the office. If you do not specify a start and end time, Out of Office auto-replies will begin immediately.
- On the '**Inside My Organisation**' tab, type the response that you want to send. On the '**Outside My Organisation**' tab, make sure the 'Auto-reply to people outside my Organisation' box is checked, and then type the response that you want to send. This could be the same response you've set for 'Inside My Organisation,' or a different one.

Recovering Deleted Emails

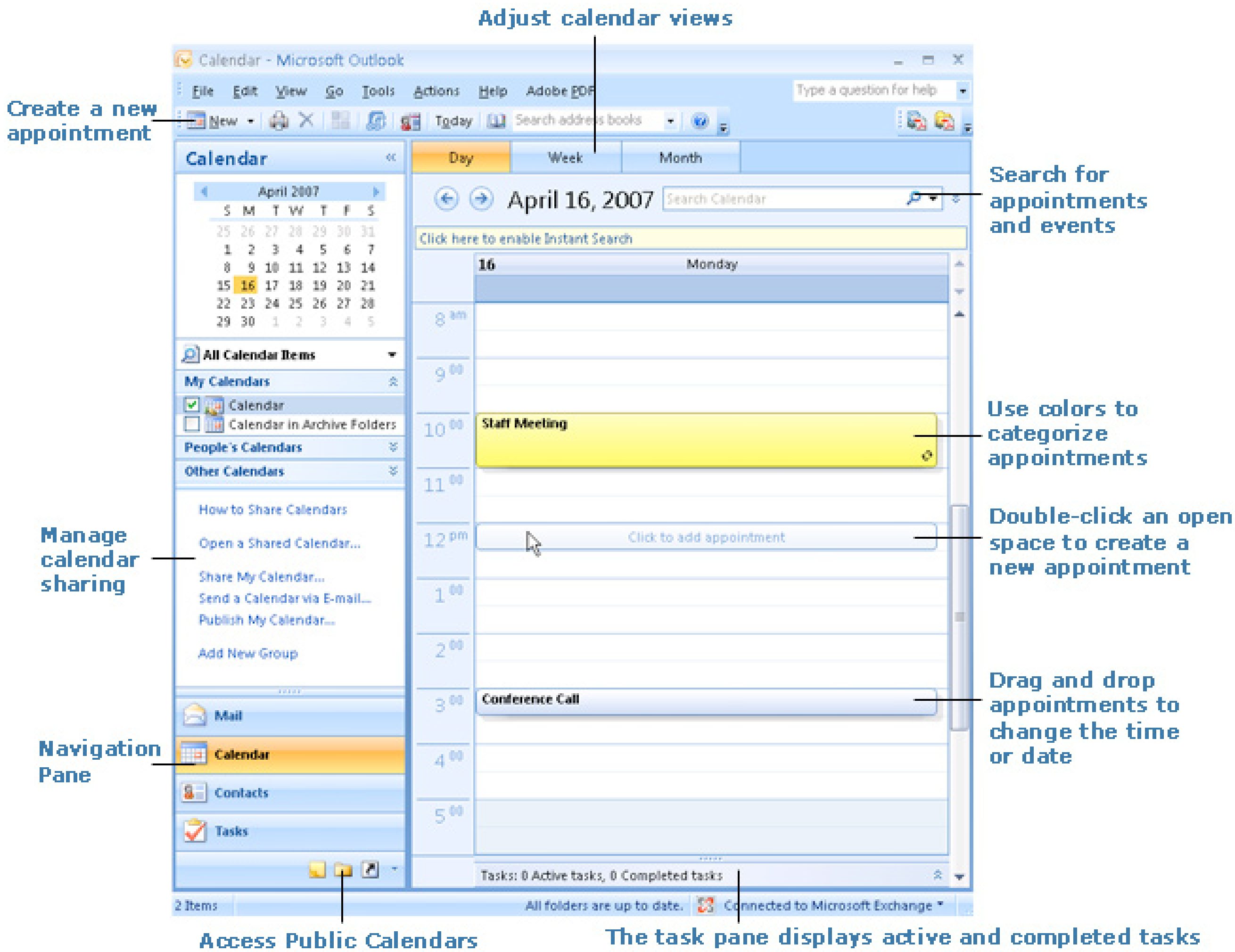
If you are looking to recover a message deleted from the Exchange server you should first look in the **Deleted Items** folder for that message. When you delete an email message from any folder other than the Deleted Items folder that message is sent to the Deleted Items folder. Any message deleted from the Deleted Items folder is considered permanently deleted but can be restored within 90 days of its deletion following this procedure:

1. From the Outlook **Mail** panel, select the mailbox from which the email was deleted (for example, your Inbox).
2. Go to the **Tools** menu and select **Recover Deleted Items...**
3. The pop-up window will display a list of all items deleted from the selected folder within the past 90 days.
4. Select the item(s) you wish to restore. You can shift-click or control-click to select multiple items, or use the Select All button.
5. Click the **Recover Selected Items** button. The selected emails will be returned to their original folder.
6. Caution: the **Purge Selected Items** button will permanently remove any selected messages from Outlook.

Using the Calendar

Calendar Interface

With the Outlook 2007 Calendar feature, you can organize your schedule and integrate communications, tasks and calendar items in one location. Click on the Calendar section of the Navigation Pane to display your calendar.



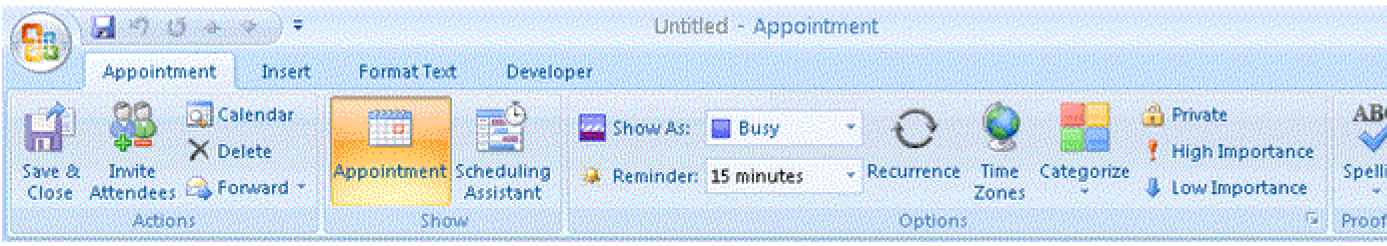
Creating an Appointment

Create one-time or recurring appointments using Outlook 2007.

To create an appointment:

1. Click the **New** button 

to open the **Appointment** dialog window. Alternatively, you can double-click on the date in the calendar where you want to set an appointment.
2. Enter a **subject** and **location** (if applicable) for your appointment and select the **date** and **time**. For an all day events, you can select **All day event**.
3. In the Appointment dialog window you can use the options listed in the **Ribbon** to customize your appointment:



   1. **Appointment Status (Show As):** Choose between Free, Tentative, Busy or Out of Office.
   2. **Reminder:** Choose a time for an appointment reminder.
   3. **Recurrence:** Click this button to show options for recurring events.
   4. **Categorize:** Keep your appointments organized by using Categories.
   5. **Private:** Keep your appointment details private. If you select this option others will only see "Private Appointment" during the specified time and a color bar along the left of the appointment to denote the appointment status (busy, out of office, etc.).

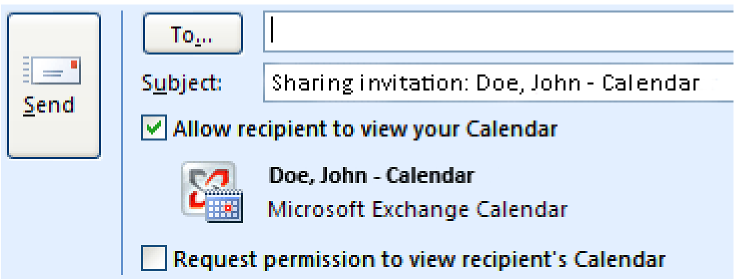
4. To set your appointment, click **Save & Close.** 

Sharing a Calendar

Together with an Exchange account, Outlook 2007 will allow you to easily share your calendar with others in your Organisation. This makes scheduling and collaborating with colleagues extremely easy.

To share a calendar:

1. In the **Calendar** section, under **My Calendars**, click **Share My Calendar...**
2. In the **To:** field, enter the name of the person with whom you wish to share your calendar.
3. If desired, you can enter in a custom subject for your sharing message.
4. Make sure that the **Allow recipient to view your Calendar** is checked. You also have the option to **Request permission to view recipient's Calendar**.
5. If desired, type a note or additional information into to the body of your message
6. Click **Send**.
7. A confirmation dialog window will appear. Click **Yes** if the information is correct to share your calendar.



For people not in your Organisation, you can also send an email with the contents of your calendar.

To send a Calendar via E-mail:

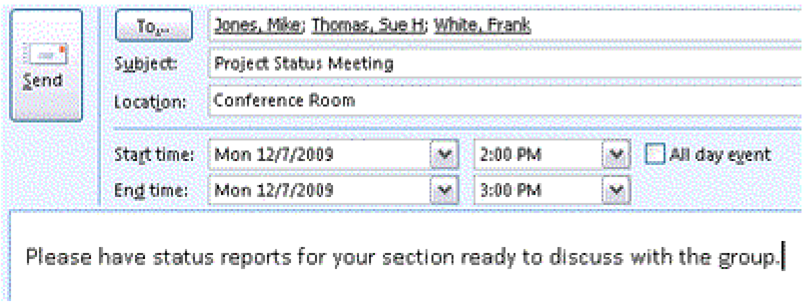
1. In the **Calendar** section, under **My Calendars**, click **Send a Calendar via E-mail...**
2. Specify the **dates** that you want to include in your e-mail.
3. Choose the **amount of detail** that you want to include (Availability only, Limited details, and Full details).
4. Click **Show >>** to show more advanced options
5. Click **OK** to return to the Message Composition window.
6. Add **recipients**, a custom **subject**, and an additional note in the body of your message and click **Send** to send your calendar.

Using the Scheduling Assistant

Outlook 2007 has a scheduling assistant feature that allows you to schedule a meeting with your colleagues.

Sending Meeting Requests

1. In the **Calendar** section, click the drop-down arrow next to the **New** button and select **Meeting Request** to open the **Meeting Request** dialog window.
2. Enter the names or e-mail addresses of your invitees in the **To...** field (separated by a semicolon). If recipients are listed in your **Address Book**, you can click the **To...** button and select them from a list.



Tip: Entering names manually will list each person as a **required attendee**. Alternatively, click the **To...** button, select a name in the **Name** list and click **Required** or **Optional**.

3. Enter a subject, location and date/time for your meeting.
4. In the body of the message, you can enter a message to your recipients or additional meeting information.
5. Click **Send** to send your invitation.

Using the Scheduling Assistant

The **Scheduling Assistant** will help you determine when all participants are available for a meeting.

1. In the **Meeting Request** dialog window, click on the **Scheduling Assistant** button (found in the **Meeting** tab in the **Show** section).

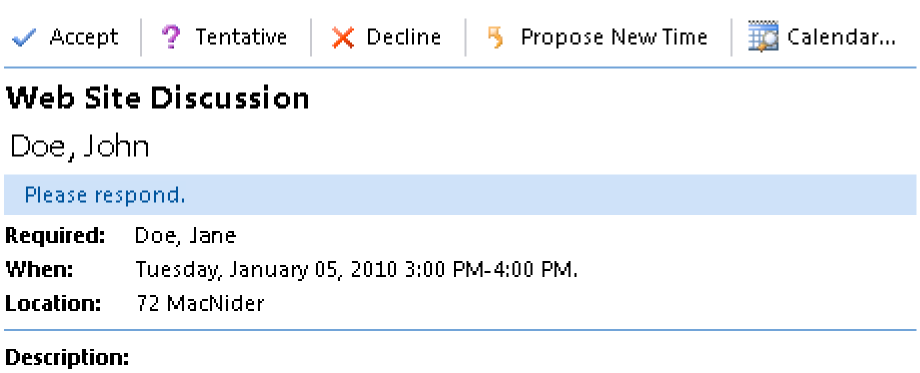
2. This will show the invited attendees, as well as when they are busy, out of the office or available. Click a row under the **All Attendees** column to add additional participants.
3. Click on a block of time when all participants are free. You can adjust the green and red start/end times by clicking and dragging them left or right.

   Tip: You can also click on one of the Suggested Times on the right panel.

   Appointment color indicators are as follows:
   1. **Blue:** The time is marked as **busy**.
   2. **Blue and White Striped**: The marked time is scheduled with **tentative** appointments.
   3. **Purple**: The time is marked as **out of office**.
   4. **Black and White Striped**: Outlook has **no information** for the time period marked. This most likely means that the attendee is not an Outlook/Exchange user within your Organisation.
4. Click on the **Appointment** button on the **Ribbon** to return to your appointment window (found in the **Meeting** tab in the **Show** section).
5. Click **Send** to send your invitation.

Responding to Meeting Requests

When a **Meeting Request** is sent, an E-mail message is sent to all invited attendees. In the message, they have the option to **accept**, **tentatively accept**, **decline** or **propose a new time** for the meeting. The attendee can click on **Calendar...** to show a copy of his or her calendar with the meeting scheduled.

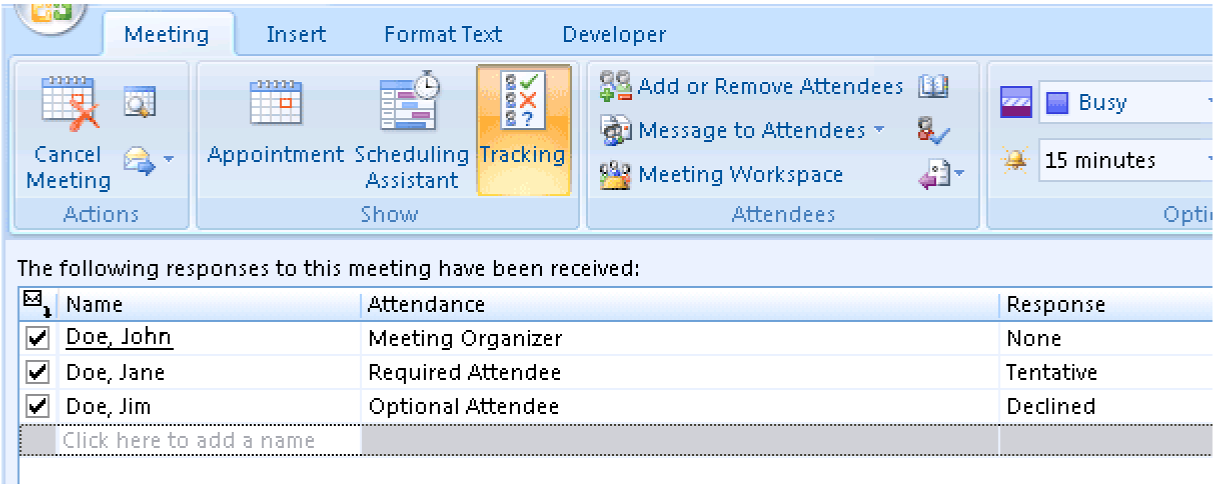


Proposing New Meeting Times

As a response to a Meeting Request, attendees can propose new times for the meeting. If you receive a response proposing a new meeting time, you can either **accept the proposal** or **view all proposals** to open the scheduling page and reschedule the meeting according to everyone's proposals. After a new time is selected, be sure to send an update to notify all attendees of the new time.

Checking Attendee Status

As the meeting organizer you will receive E-mail responses from invited attendees as they respond to your request. Alternatively, you can also check the status of each attendee using the **Tracking** button, shown in the **Show** group on the **Meeting** tab (this button only shows in the toolbar after a **Meeting Request** has been sent). The **Tracking** button shows each attendee, whether their attendance is required or optional and the status of their response. Only the meeting organizer can see this information.



Exploring the Contacts Folder & Address Book

Use Outlook's Contacts folder to manage and organize contact information for all of your business, people, and Organisational contacts.

Contacts Folder: Managing Local Contacts

Contacts that you have compiled (i.e., local contacts) are found in your Contacts folder (located on the navigation pane). The Contacts folder is a place where you can store and manage contact information. If you've already been using Outlook or if your mailbox has been transferred from another email client (e.g., Microsoft Mail), chances are you already have contacts in this folder.

Contact Folder Quick Reference:

- **Edit a contact:** double-click the contact
- **Find a contact:** enter the contact's name in the "search contacts" box
- **Delete a contact:** select the contact and press the delete key
- **Change the view:** select a view in the navigation pane to change the way in which contact information is displayed (by default, the view is set to "Business Cards")

Create a New Contact

1. Click on the **Contact** button on the Navigation Pane
2. On the **File** menu, point to **New**, and then click **Contact** (or press **Ctrl+Shift+C**).
3. Type a name for the contact.
4. Enter the information that you want to include for the contact.

- To specify how you want the contact's name to appear in the to line of a message, type a name in the **Display As box**.
- To enter multiple entries for a field, such as more than one phone number or e-mail address, click the down arrow next to the field.

Create a contact from an e-mail message that you receive

1. Open or preview the e-mail message that contains the name that you want to add to your contact list.
2. Right-click the name of the sender who you want to make into a contact, and then click **Add to Contacts** on the shortcut menu.

Address Book: Searching Global and Local Contacts

The address book (found by clicking the address book icon or the **"to"** button on email compositions) will enable you to search your Organisation as well as your local contacts.

Address Book Quick Reference:

- **Find a contact:** enter the name of the contact in the search box and press **"Go".** By default, Outlook will search the Global Address List. If you would like to change the directory, simply select the down arrow under **"Address Book"** and choose another directory.

Create and Manage a Group/Distribution List

Do you find yourself emailing the same group of people over and over again? If so, a distribution list may be a good solution for you. Distribution lists contain email addresses for multiple people. A distribution list is your own personal list of people that you manage via Outlook.

Create a group/distribution list:

1. From the Navigation pane, click **"Contacts"**
2. Select New > Distribution List
3. In the Name text box, enter a name for the list.
4. To add members from your Organisation (or your local contacts), select **"Select Members"** to open the address book.
    1. Enter the member's name and add it to the list by either double-clicking the name or selecting it and pressing the **"members"** button.
    2. Save and close
5. To add members outside your Organisation, select **"Add New"**
6. Enter the person's name and email address.
7. Press OK

Email a group/distribution list:

1. From the Navigation pane, click **"Contacts"**
2. Select the distribution list you would like to email
3. Select New > Message to Contact

Tasks Overview

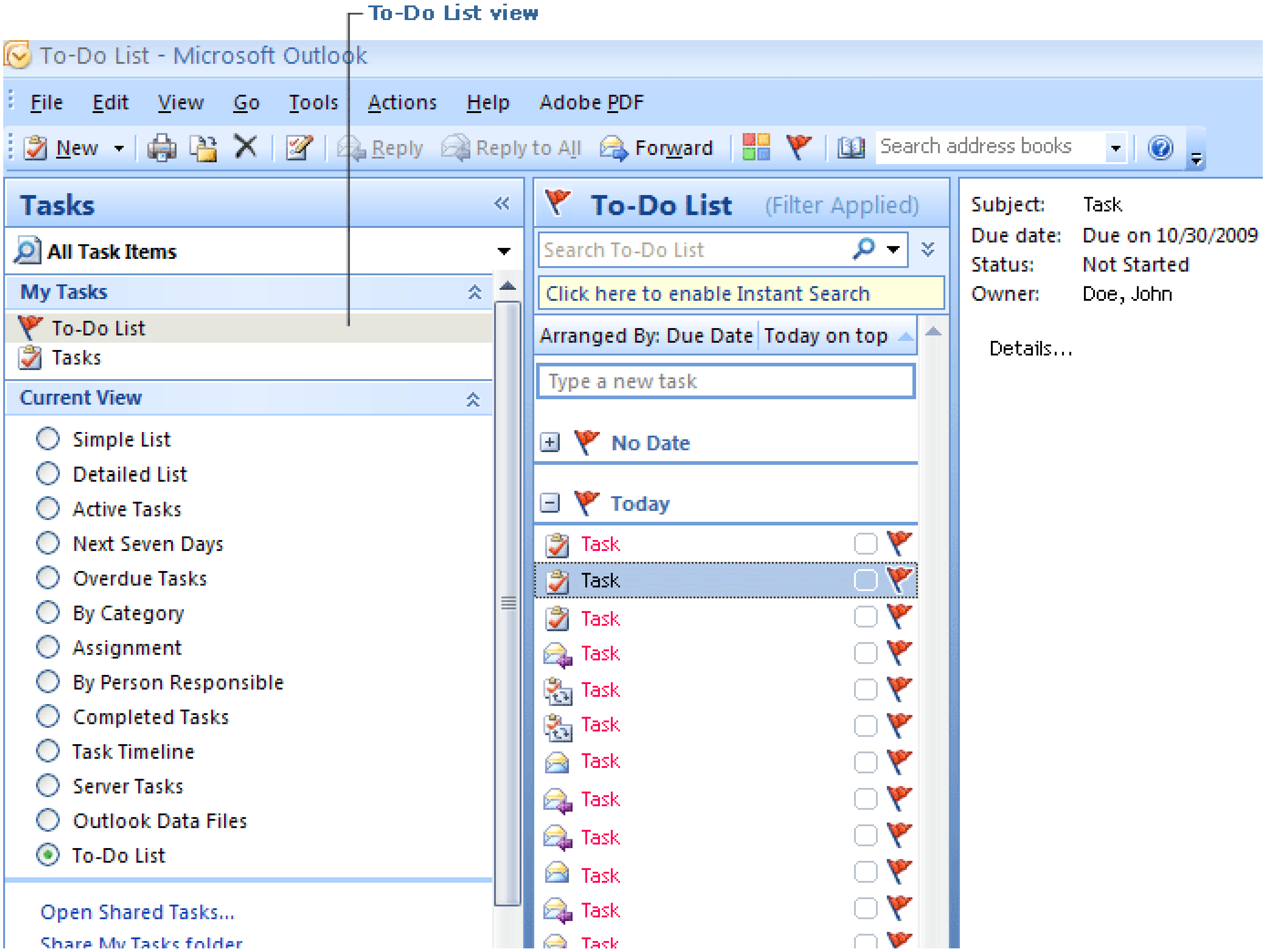
Outlook 2007 provides an easy, efficient way for you to keep track of your to-do list. Use the Tasks feature to create one-time or recurring tasks, set up reminders for tasks, and assign tasks to others.

You probably already have some way of keeping up with tasks - whether you use notebooks, stickies, or just your memory. Even if you have managing your to-do list down to a science, you may still want to check out Outlook's Task feature. The Tasks feature enables you to set up reminders about your tasks, track your tasks (and tasks you've assigned to other people), and rearrange your task list into different views (e.g., next seven days, overdue tasks, etc.). Have you ever struggled with keeping up with emails that need response? One benefit of Outlook's tool integration is that you can "flag" an email that needs response; the email will be automatically added to your To-Do list.

Viewing Tasks

- **via "Tasks" (on the Navigation Pane)**

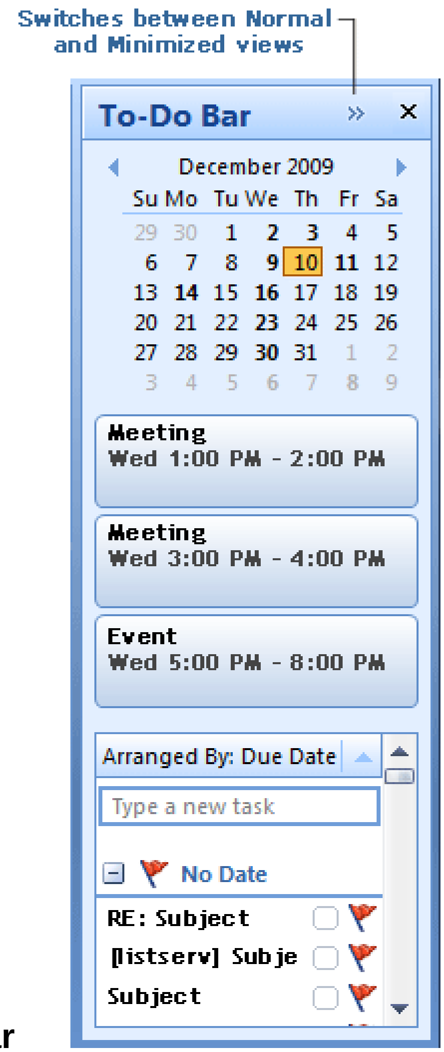
  You can easily view and manage tasks by clicking **"Tasks"** on the Navigation Pane. The default view will show your **"To-Do List"** arranged by date. Notice under **"Current View"** that you can change the task view to whatever seems to make the most sense to you. For instance, if you just want to see the next seven days of tasks, simply select **"Next Seven Days".**



Task Icons

You'll notice that most tasks views include a column for task icons. Below is a summary of the different task icons:

- One-Time Task
- Recurring Task
- Email Task (flagged email)
- Assigned Task



Via the To-Do Bar

The To-Do Bar, which appears to the right of the To-Do List pane by default, shows your upcoming appointments and your tasks list. You can easily add the To-Do Bar to any item (email, calendar, etc.) so that you can see your upcoming tasks without having to click the **"Tasks"** button on the navigation pane.

Add the To-Do Bar: From the top menu bar, click View > To-Do Bar > and choose either **"Minimized"** or **"Normal".** Selecting **"Minimized**" will collapse the To-Do Bar into a vertical view where only the top appointment and task appears. Selecting **"Normal"** will give you a more comprehensive view. Note: You can easily switch between Minimized and Normal view by clicking the double-arrow at the top-right of the To-Do Bar.

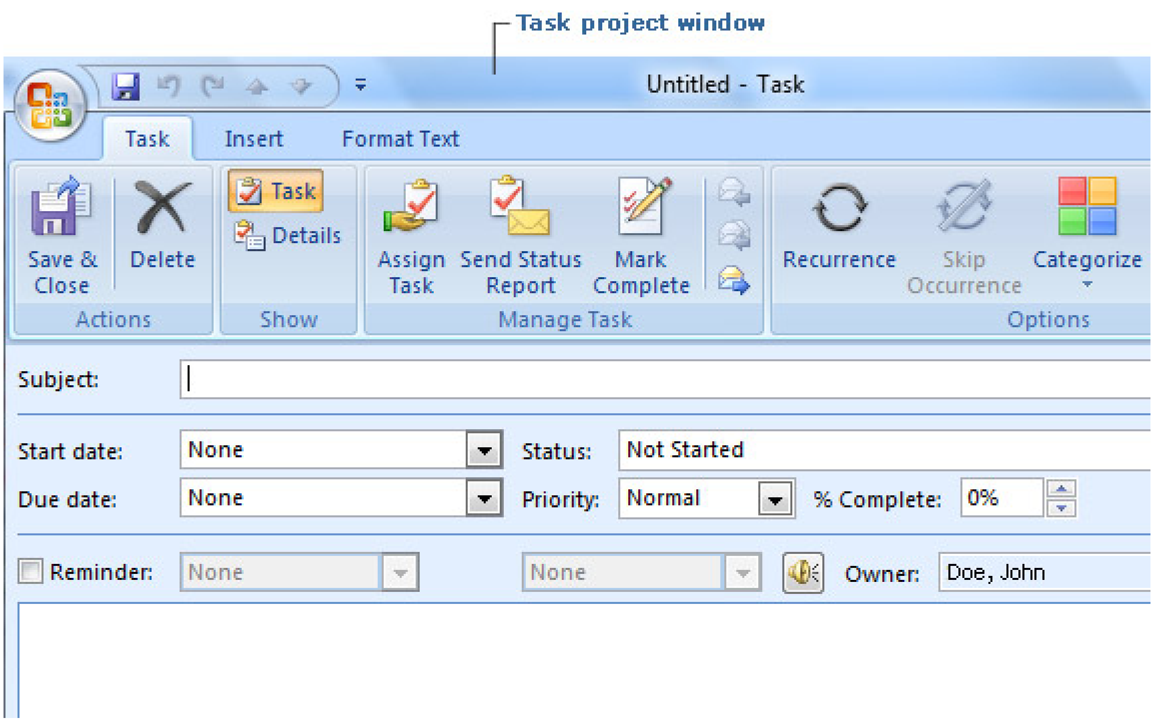
Creating & Editing Tasks

Create a New Task Item

There are two ways to create a task item:

- Via the **Menu Bar**, select **File > New > Task** (or press Ctrl+N on your keyboard).
- Via the **Standard Toolbar**, click "New".

An **"Untitled - Task"** project window will appear. Fill in the **Subject**, **Start/Due dates** and any other fields that you choose, and then click the **"Save & Close"** icon. The task now appears and can be tracked within Outlook.



Edit an Existing Task Item

To edit an existing task, simply double-click it, and the task project window will appear. Make your desired edits and then click **"Save & Close"**.

Delegation

Whether you're a busy executive who needs an administrative assistant to handle emails and respond to meeting requests or you're just heading out of town and need someone to keep an eye out for an important email, Outlook's delegation feature may be a good option for you. Learn how to give another person the ability to manage your calendar and/or email through delegation.

About Delegation

Outlook enables you to delegate certain responsibilities to another person. Unlike sharing your password with an assistant or colleague, delegation enables you to selectively restrict a person's access to your data.

There are two types of delegation:

- **Send-on-behalf-of Delegation**
  When you specify an individual as a delegate for your account, you're giving them send-on-behalf-of delegation. This means that they can respond to/send out meeting requests, send emails, etc. on your behalf.
- **Folder Access**
  Outlook enables you give others access to specified folders, without granting send-on-behalf-of delegation. For instance, if you want someone to have access to your **"Contacts"** folder, you can grant them folder level access and then specify the type of things they can do in that folder (read-only, create contacts, delete contacts, etc.).

  *** Note:** Outlook uses folders to organize your data. For example, the calendar folder contains your schedule, the contacts folder contains your contacts, the inbox folder is where your email is delivered, the tasks folder contains your tasks, etc.

Delegation Requirements

- Both the manager and the delegate must be in your Exchange system
- Both the manager and the delegate must be using the same version of Outlook
- You can only delegate access to those folders living on the your Exchange system (vs. the folder living on the person's computer)

Adding/Removing Send-on-behalf-of Delegates

1. Choose Tools > Options
2. Click on the Delegates Tab
3. Click "Add..." (to remove a delegate, simply click on the delegate and press "Remove")

4. Search for the name(s) of the delegate(s) (Tip: Searching by Last Name, First Name produces better results) and add the delegate by either double-clicking on the name or selecting and pressing **"Add->".**
5. In the Delegate Permissions window, specify the level of access you would like to grant the delegate(s)
    1. Specify the type of access you would like the delegate(s) to have for specific Outlook items (i.e., folders):
        1. **None:** The delegate will not have access to the folder.
        2. **Reviewer:** The delegate can read the content in this folder but cannot modify content.
        3. **Author:** The delegate can read existing content and create new content, but cannot modify existing content
        4. **Editor:** The delegate can read existing content, create new content, and modify existing content (including deleting content)
6. Click OK to close the Delegate Permissions window
7. Once you are finished assigning delegates, click OK to close the Options window.

Adding/Removing Folder Access

Note: Folder access can only be granted to folders that live on the Exchange system (vs. being stored on a person's computer)

1. Right click the folder you would like to grant access and choose **"Properties".**
2. Click the Permissions tab.
3. Select **"Default"** to set the permissions you want users to have if they aren't explicitly assigned permissions (i.e., their name doesn't appear in the names list.
4. Click **"Add..."** to add a user to the list if you would like to grant him/her explicit access (to remove a delegate, simply click on the delegate's name and press **"Remove"**). Search for the name(s) of the delegate(s) (Tip: Searching by Last Name, First Name produces better results) and add the delegate by either double-clicking on the name or selecting and pressing **"Add->".** Once you've finished adding the delegates, press OK. You should now see the delegates listed in the Permissions window.
5. Select the delegate and set the permission levels for the delegate by either selecting each item individually or choosing a permission level in the drop-down menu (each permission level you choose from the drop-down menu will check the corresponding permissions so that you can see what each level encompasses).
6. Once you're all set, press OK to close the Properties dialogue box.