



Microsoft Outlook 2007
Module 2

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Microsoft Outlook 2007: Module 2

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Objectives

Upon completion of this module, participants will be able to:

1. Perform skills covered in Outlook module one;
2. Manage and manipulate the Workspace layout and appearance;
3. Create, manage and organize Folders;
4. Sort, manage and categorize messages;
5. Request Message and Read receipts;
6. Identify and use the Search feature;
7. Set up and manage automatic message replies;
8. Apply rules to messages and calendars;
9. Identify parts and features of the Outlook calendar;
10. Explore various Calendar views;
11. Use and Customize the Calendar;
12. Create and work with Appointments, Events, and Meeting Requests;
13. Respond to Meeting Requests;
14. Create and work with Tasks;
15. Customize Toolbars, Menu Bars and Calendar Properties;
16. Share Calendar information and apply Permission levels;
17. Define and know how to download Instant Search component;
18. Use the Outlook help feature.

Overview:

We will begin with a quick review-activity of the skills covered in Outlook Module I. Participants must be able to compose, send and receive e-mail messages; create and customize Contacts and Insert a Signature.

Pre-Requisite Activity: Module 2

This activity will have you demonstrate and reinforce the skills you will need in order to complete this module. You will compose, format and print an e-mail with delivery options; create a signature and create a contact.

Guidelines:

Steve Ballmer is the Chief Executive Officer of Microsoft Corp, the world's leading manufacturer of software for personal and business computing. Ballmer joined Microsoft in 1980 and has headed several Microsoft divisions, including operations, operating systems development, and sales and support. In July 1998, he was promoted to president, and was named CEO in January 2000.

With the launch of Microsoft Office 2007 and Vista Operating System you may have questions you would like to ask him. Use your Outlook skills to **compose an e-mail to the Microsoft CEO** (sballmer@msoffice.net) asking him at least two questions regarding the new and improved Outlook features.

Perform the following tasks (15 minutes):

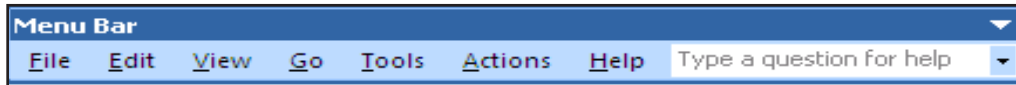
1. **Open** Outlook;
2. **Insert** the **Contact** information for Microsoft Office CEO and your instructor in an addressbook folder named "**Workshop**".
3. **Create** a personal **Signature**, with your Name, Title and Phone Number, using Verdana, 12 pt Font;
4. **Create** a New E-mail message addressed to Steve Ballmer and cc your Instructor;
5. The **Subject** of the e-mail should read: "**Questions on New Features**";
6. **Compose** a message explaining how you use Outlook and what you want to know about one or several features found in Microsoft Office Outlook 2007;
7. **Format** your message to include **Bold** headings, **Bullets** or **Numbering** and two different size **Fonts**;
8. **Spell Check** your message;
9. **Print** your message to the default printer and turn it in to your instructor.
10. **Save** in Draft folder, **DO NOT SEND** and **Close** Outlook 2007.

Personalize Your Workspace

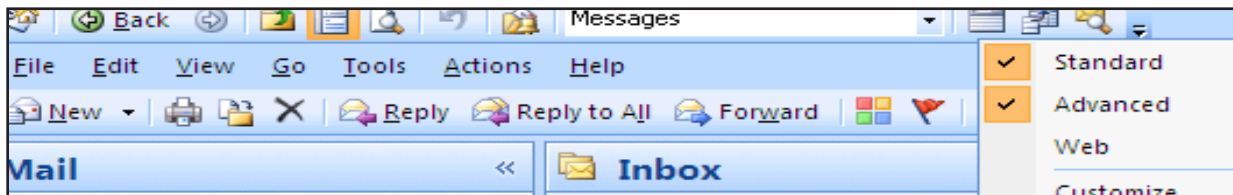
Increase Workspace

The **Outlook** program window includes **six areas** in which you work with your **Outlook** items. You may find that you don't need all the available tools, or would like more space for the main work area. You can easily change the appearance and layout of the workspace in several ways. Here are a few:

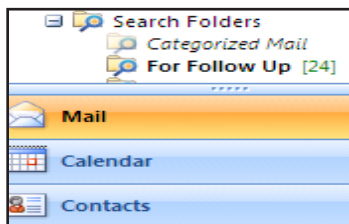
Menu bar - can be **moved** to any side of the program window or have it float anywhere on your screen.



Toolbars - by default show command buttons frequently used in the **File**, **Edit**, and **Actions** categories. Other toolbars available for display are the **Advanced** and **Web** toolbar. You can **hide or display toolbars** by just right-clicking anywhere on the menu bar.



Navigation Pane - appears on the left side of the Outlook window. Its content changes depending on what you are viewing. It can be **minimized** and the appearance and **content can be changed**.



Inbox - appears in the center of the window. Its view can be **re-sized** and it allows you to display and organize content in many ways.

Reading Pane - displays a preview of a selected message, appointment, or attached file. This pane can be **displayed to the right of or below the Inbox, or closed**.

To-Do bar - appears to the right-side of the Outlook window, displaying calendar(s), upcoming appointments, and task list. It can be **minimized**, rearranged and its content can be changed.

Activity 1

You try it! Personalize your workspace!

1. Minimize the **Navigation** pane.
2. Re-size the **Inbox** to be 50/50 with your **Reading** pane and Arrange by Subject.
3. Display the **Reading** pane below the Inbox
4. Minimize and Remove Tasks from the **To-Do Bar**.

Managing Messages:

Create Folders

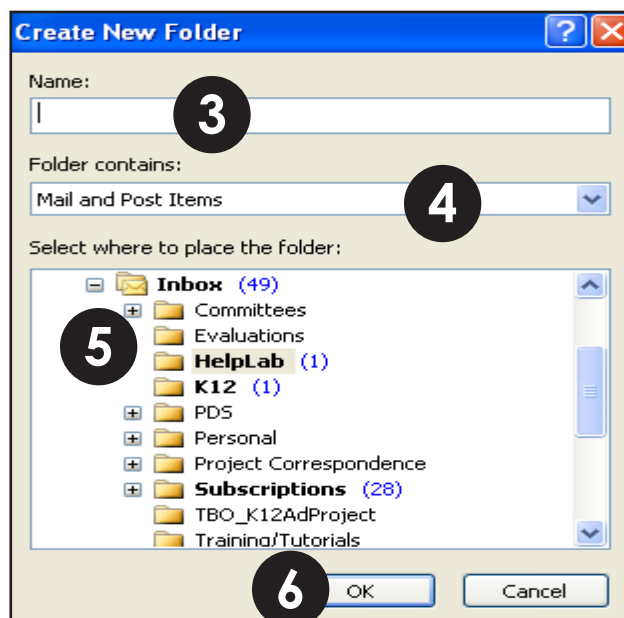
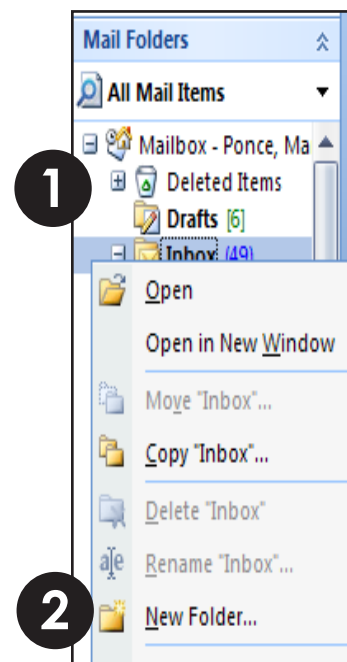
Folders can help you organize your messages by allowing you to group them by topic.

To help keep various items in order, Outlook allows you to create new folders in addition to the default folders already provided. Follow these steps to create new folders and subfolders:

1. In the **Navigation Pane**, right-click your mailbox.
2. **Click** New Folder.
3. **Create New Folder** dialog box opens, type a name for the folder in the **Name** text box.
4. Verify the “Mail and Post items” is selected under “**Folder contains:**”
5. **Select** a location for the folder in the “**Select where to place the folder**” scroll box.
6. **Click OK**. The new folder is created and appears in your Folder list.



To keep your e-mail together in one location, it is a good idea to use the **Inbox** as the parent folder.



Managing Messages:


Categorize Messages

Color adds visibility. Categories in Outlook help you organize and quickly identify items using color.

To **assign a color category** follow these steps:

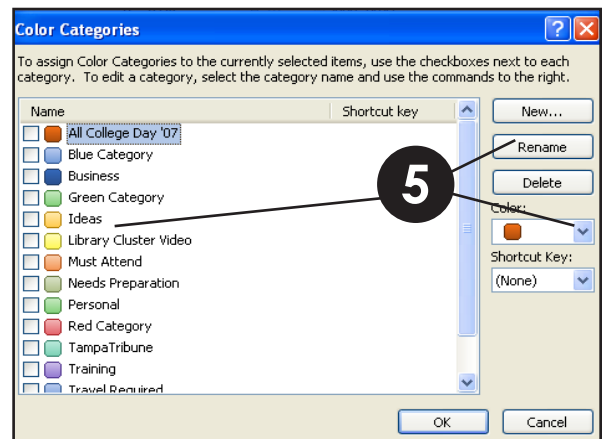
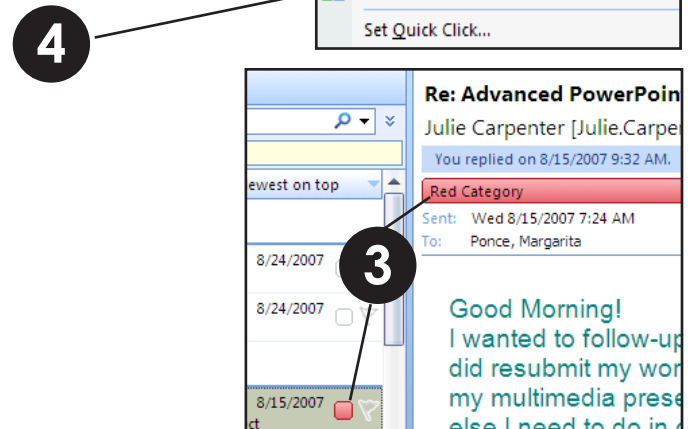
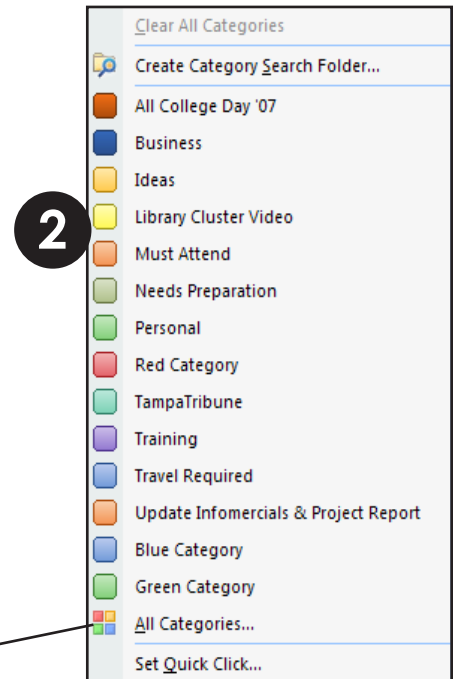
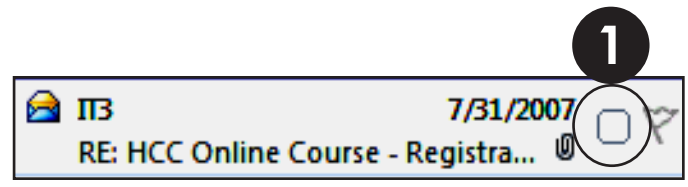
1. Right-click the **Categories field box** next to the message subject in the header list.
2. Click a **color category**, or click **All Categories** to create and assign a new one.
3. The category color appears in the **message header** and in the **Categories field box** in the header list.

To **rename a category or change its color** follow these steps:

4. On the **Standard toolbar**, click the  **Categorize** button, and click **All Categories** in the drop-down menu.
5. In the **Color Categories** dialog box, select the category that you want to change and do one or both of the following:
 - To rename the category, click the **Rename** button and type the new name
 - To change its color, click the **arrow next to Color** and select the new color.



You can assign a **color category** to a group of interrelated items — such as notes, contacts, appointments, and e-mail messages — so that you can quickly track and organize them. You can also assign more than one color category to items.




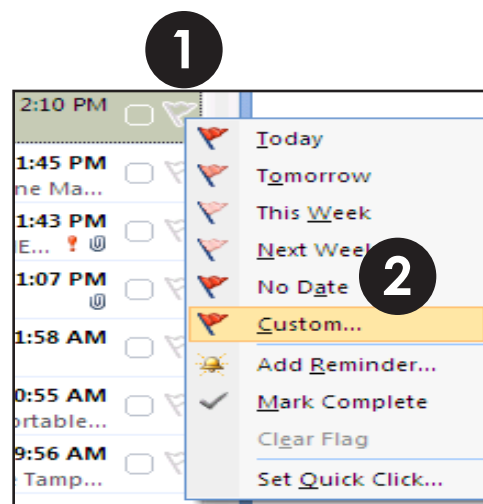
Managing Messages:

Flag Messages

You can use a **flag** to quickly create a follow-up item that can be tracked in the To-Do Bar, in your Inbox, and even in the Calendar. **Outlook 2007** has replaced colored flags with colored categories. You can now choose from one of five predefined flags or choose a custom flag to help you prioritize.

To **Flag a message** follow these steps:

1. Right-click in the **Flag Status column**  next to the message that you want to flag.
2. Select a **flag type** or **custom flag**.
3. If a custom flag is chosen, the **Custom Dialog** box opens. Select the **flag type** and **actions** you want attached to this flag.
4. Click **OK**. Message is flagged.



Update Outlook 2003 colored flags to color categories:

1. In the **Navigation Pane**, right-click the **top level folder**.
2. Click **Properties** for “Folder Name.”
3. On the **General tab**, click **Upgrade to Color Categories**.
4. Click **Yes** if you receive a prompt asking you if you want to upgrade.




Only flags in your default mailbox will be updated automatically from Microsoft Office Outlook 2003 follow-up flags to the new Outlook 2007 color categories. If you have messages in Personal Folders or Archive Folders you will need to manually update flagged messages in those folders.

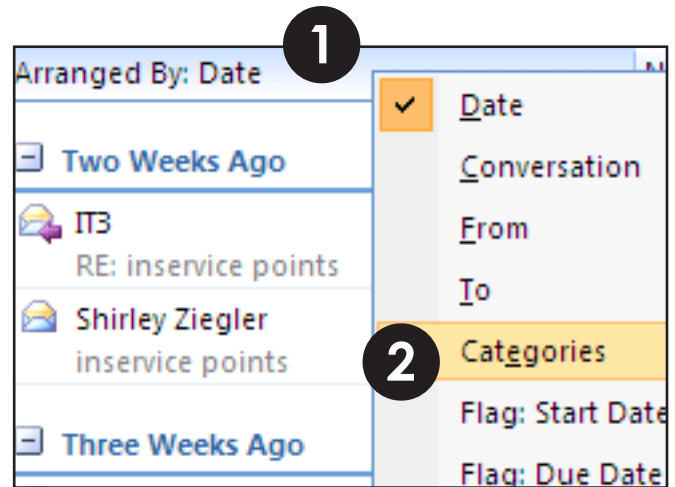
Managing Messages:

Sort Messages

After categorizing and flagging the appropriate messages, you can **sort** the messages by category color. One way to **sort** the messages by category color is as follows:

1. With the **Inbox** window active, **click the “Arranged By:”** bar.
2. **Click Categories** in the Arrange By submenu.

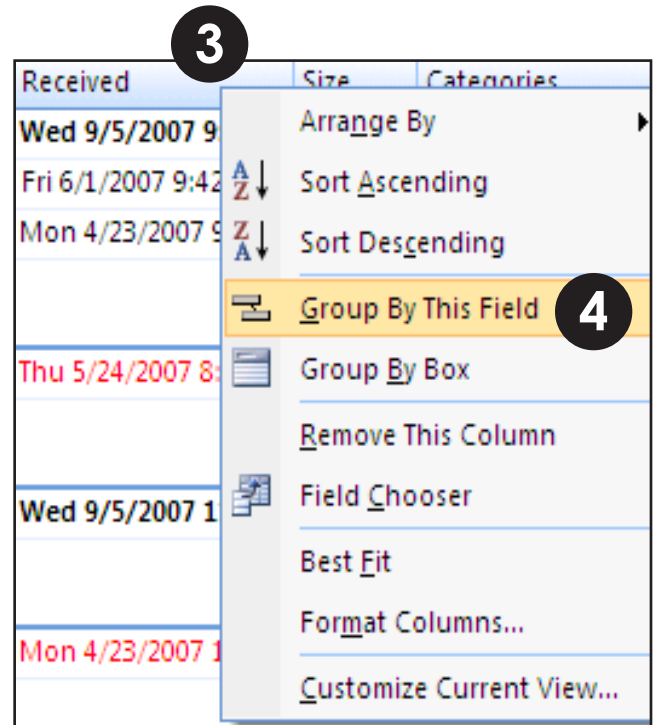
 In addition, Outlook 2007 allows you to sort messages using column headers as your sort criterion (when Reading pane is in Bottom view).



Group Messages

Whereas sorting allows you to arrange messages in order using a single column as the sort criterion, **grouping** allows you to display the messages in groups based on one or more columns. Follow these steps to group messages in a message folder:

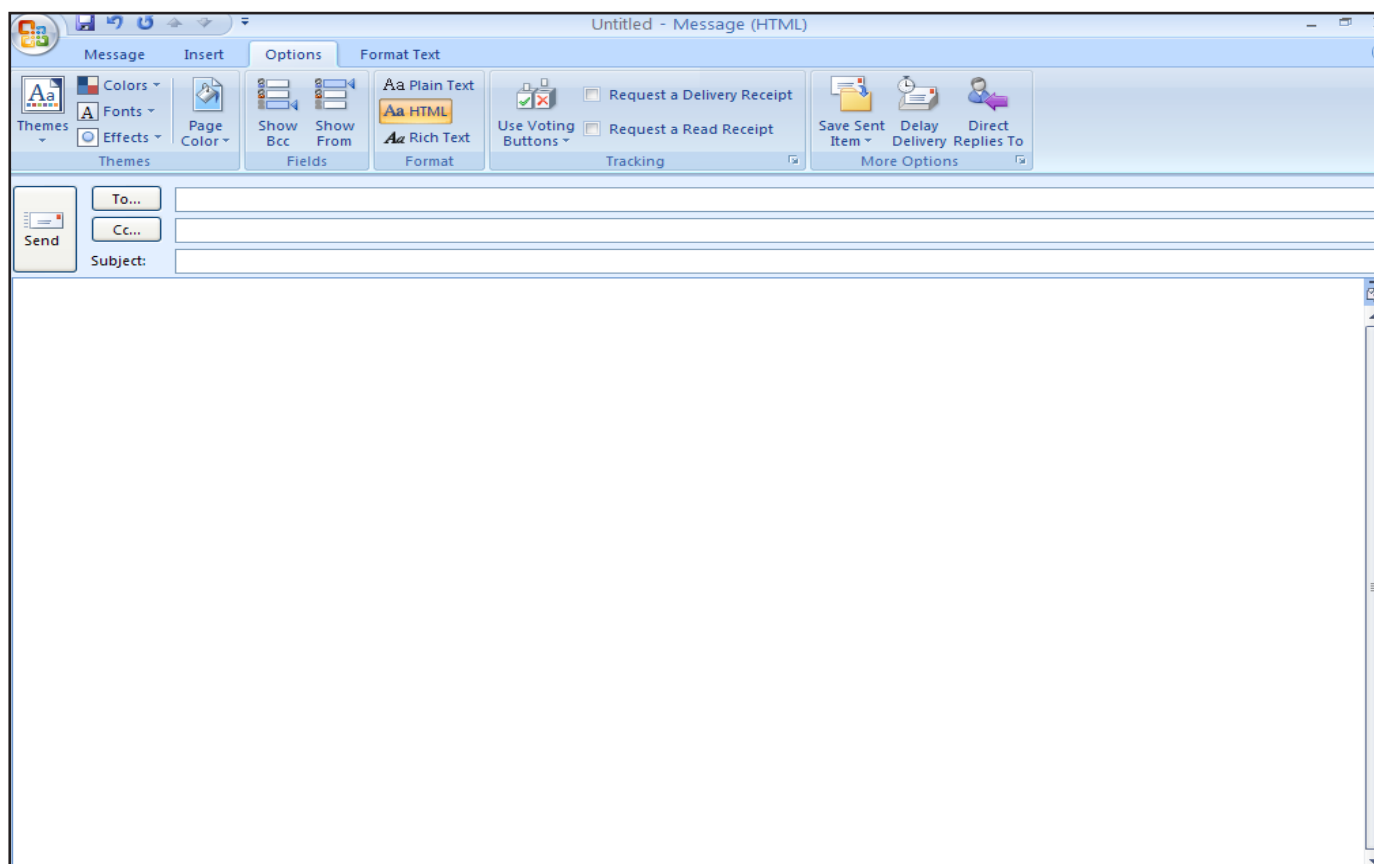
3. Open the folder you want to organize. When in Bottom view, **right-click the column header**.
4. Choose **Group By This Field** to group based on the selected field.



Managing Messages:

Options Tab

The **Options** tab is one of the tabs available in the **Ribbon** of a **New E-Mail Message Window** (see illustration).



The **Options** tab groups commands related to a variety of optional settings that can be applied to messages. These commands are organized into **five** groups:

Themes - allows you to change the overall design of a message, including colors, fonts and effects

Fields - allows you to show or hide the “Bcc” or “From” fields from the message window

Format - allows you to set the format of the message to plain text, HTML and rich text

Tracking - allows you to set security, importance, sensitivity, delivery and tracking of messages

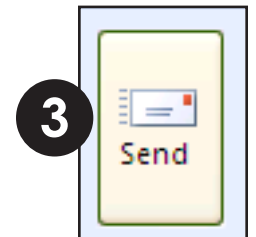
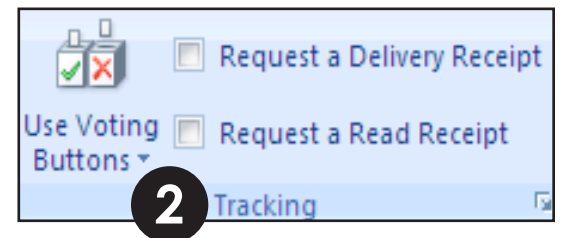
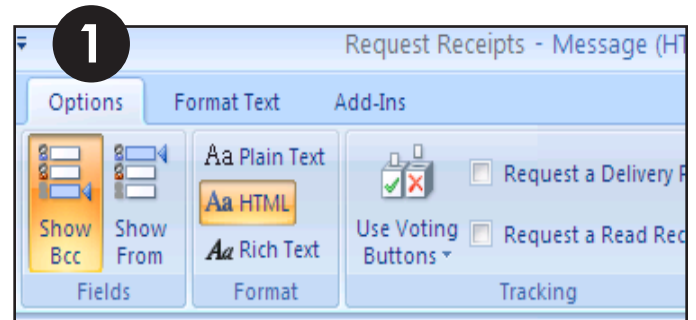
More Options - allows you to specify where to save messages, delivery date and time and what e-mail address should message replies go to

Managing Messages:

Request Message Receipt

A message recipient has the option to tell you if a message has been delivered and/or read. The **Delivery Receipt** is automatically generated when the message has been delivered to the recipient's mailbox. The **Read Receipt** is generated when the message is opened.

1. In an active message. Select **Options** tab.
2. In the **Tracking** group:
 - Select **Request a Delivery Receipt**, to receive notification that the message has been received.
 - Select **Request a Read Receipt** to receive notification that the message has been read.
3. Click **Send**. The message is sent with receipt requests.



The option is selected if a checkmark appears in the check-box.

Activity 2

You received an e-mail with a Subject line, Smart Art Illustrations. Using this e-mail message and the concepts, skills and guidelines presented in this module thus far, complete these tasks (15 minutes):


1. **Open** the e-mail regarding **Smart Art Tags**.
2. Complete the actions requested in the e-mail message.
3. Set **message options** to High Priority and Request a Read Receipt.
4. **Flag** Recipient to Follow-Up within the next two days.
5. Create a **category** named "Workshops" and apply to this message.
6. **Spell check** and **Send**.

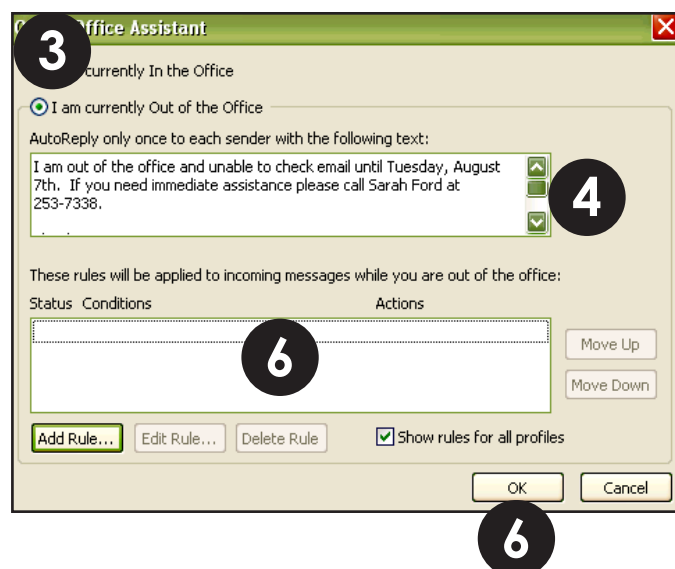
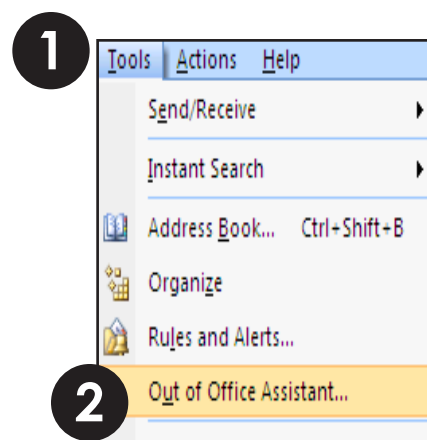
Managing Messages:

Out of Office Assistant

One improved feature in Outlook 2007 is the **Out Of Office Assistant**. The Out of Office Assistant makes it easy to set up an automatic reply message. To set up an **Out Of Office message** follow these steps:

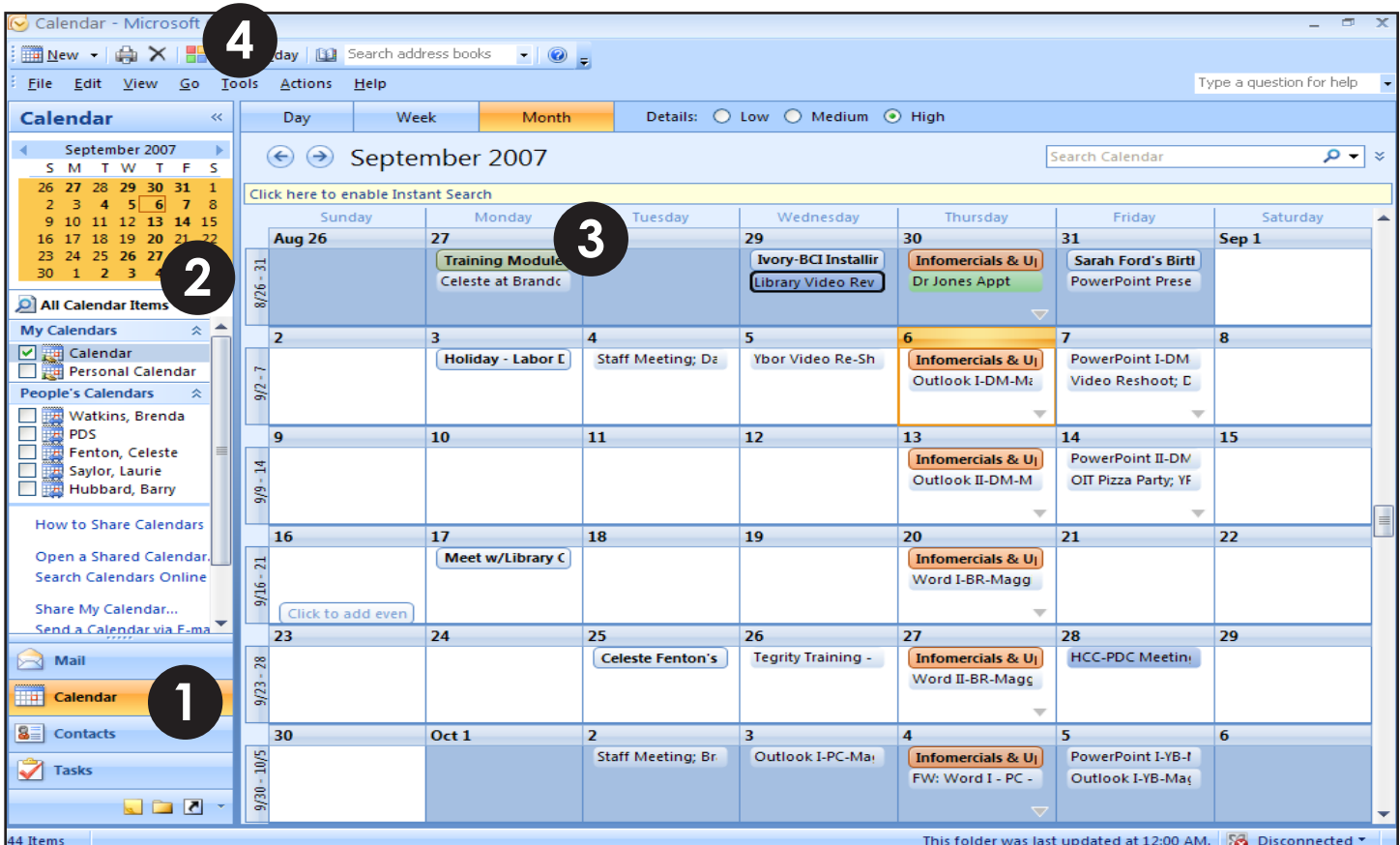
1. Click the **Tools** menu.
2. Select **Out of Office Assistant**.
3. Click to select “I am currently Out of the Office”.
4. Type the **automatic reply message** you want sent to others while you are out.
5. **Rules** can be applied to incoming messages (e.g. place messages in Out of Office Mail folder).
6. Click **OK**.

 The **Out of Office Assistant** command does not appear unless you are using an **Exchange account** (collaborative communications server for businesses).



The Calendar Environment

The **Microsoft Outlook Calendar** is the calendar and scheduling component of Outlook, and is fully integrated with your Outlook e-mail and contacts. With **Calendar**, you can create appointments and events, organize meetings, and book meeting rooms and other resources.

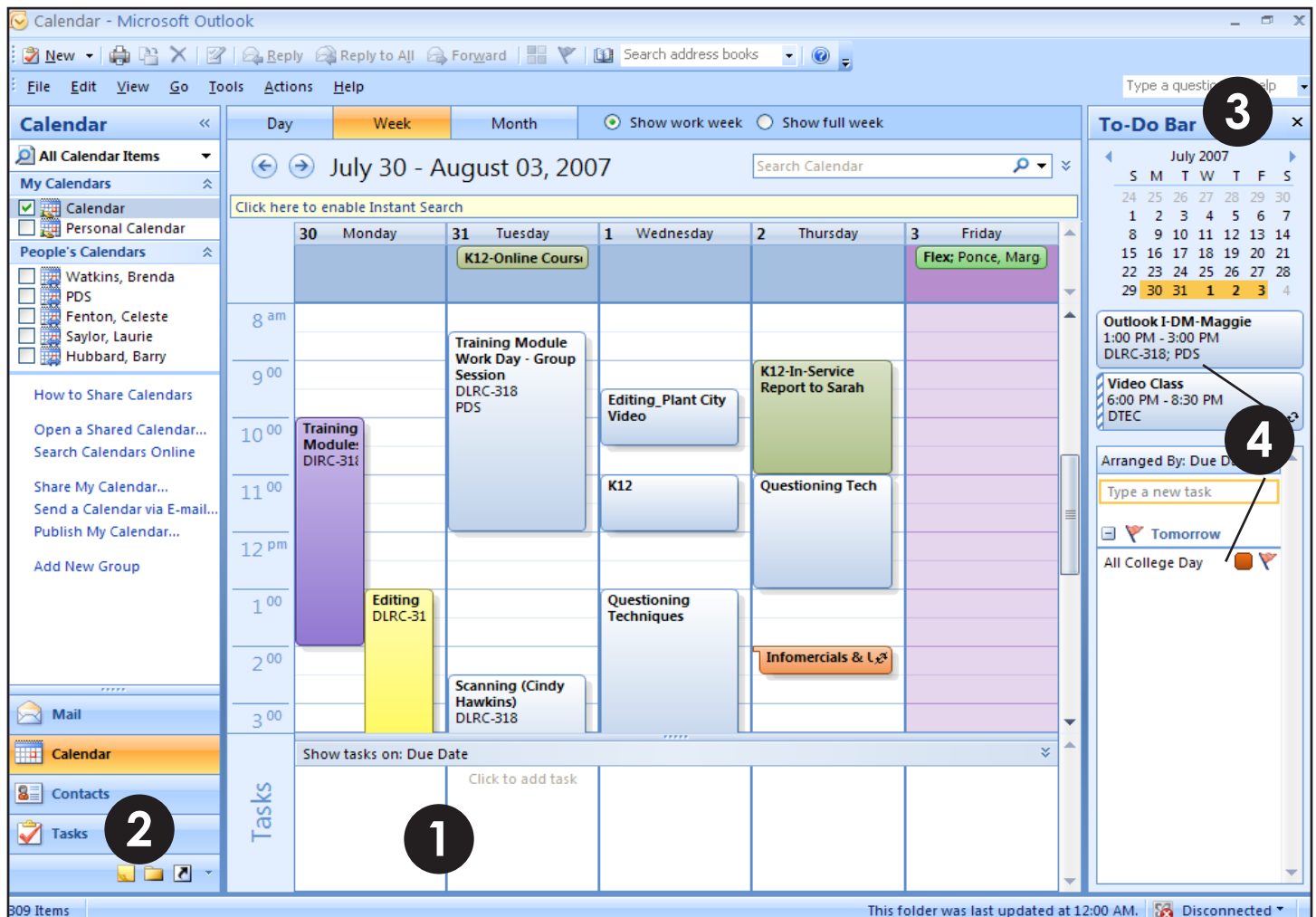


1. To access the **Calendar**, click on the icon just below the Mail icon in the **Navigation** pane.
2. When in the **Calendar** workspace, the **Date Navigator** appears at the top of the Navigation pane.
3. The **center of the window** displays a calendar by Day, Week or Month.
4. The Calendar display can be **customized**, in the **Tools** menu, under **Options**.

Time Management:

Daily Tasks and To-Do Lists

The **Daily Tasks** and **To-Do Lists** are two other key views in the Calendar Environment to help manage your workload.



1. When the **Calendar** is viewed by Day or Week, the **Daily Tasks List** appears at the bottom of the screen, and any Tasks are shown there on the date they are due.
2. **Tasks** can also be managed in the Tasks section found on the **Navigation Pane**.
3. In all **Calendar** views, the **To-Do List** runs vertically down the right side of the screen. The To-Do list is an overview of your entire schedule.
4. **Upcoming Appointments** and **Tasks** are displayed along with the Date Navigator.

Time Management:

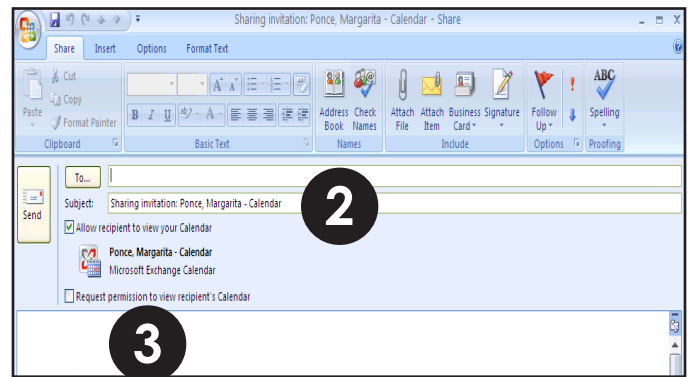
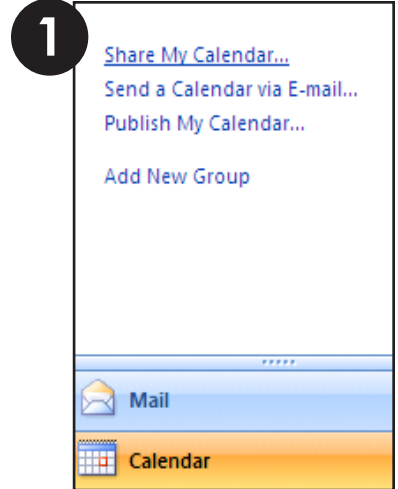
Sharing Calendars

You can **share calendar information** with other people in many ways. To **share your calendar**, follow these steps:

1. In the **Calendar** window Select “**Share My Calendar**” on the **Navigation** pane.
2. A **Sharing Invitation** window opens with the subject already filled out and the “**Allow recipient to view your calendar**” **box checked**.
3. You can also request to see the recipients’ calendars by checking the “**Request permission to view recipient’s calendar**” box.



Once you assign your calendar with other users, you can then assign each account a permission level. To change sharing permissions right-click the shared calendar in the Navigation pane, the click “**Change Sharing Permissions...**”.

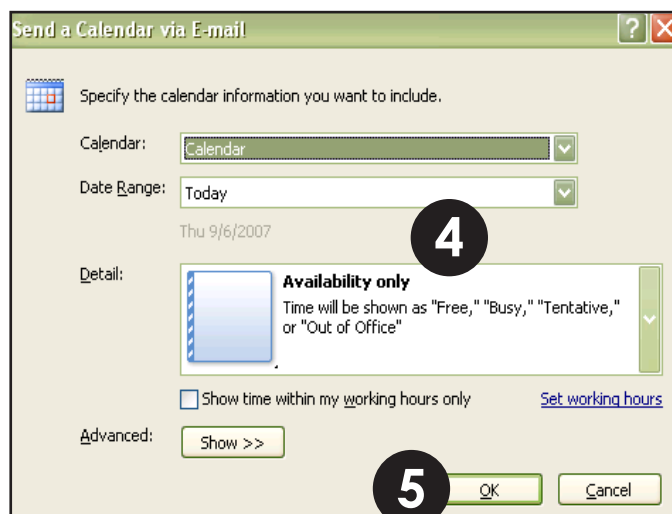
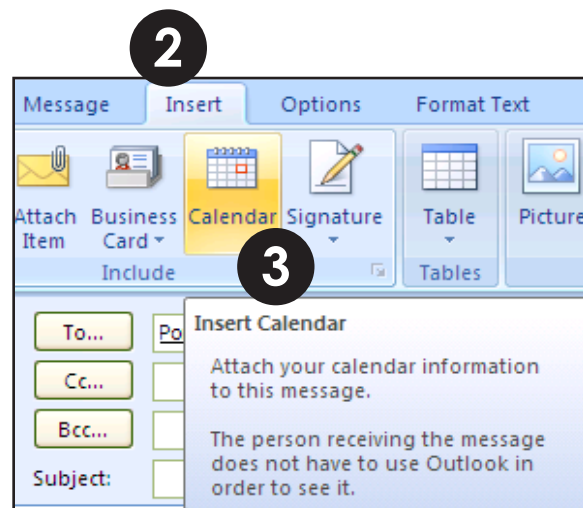


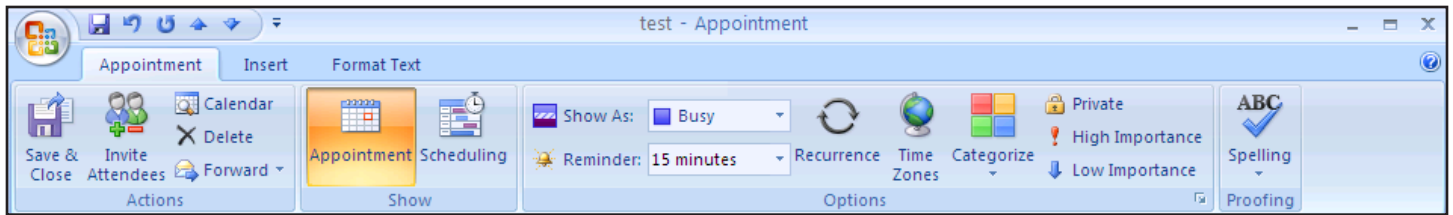
Time Management:

Calendar Sharing via E-Mail

A new feature of Outlook 2007, sending Calendar information in an e-mail, allows you to share calendar information with anyone, anywhere who uses HTML capable e-mail program.

1. Compose your e-mail message.
2. Select the **Insert** tab.
3. Click **Calendar** tool in the Include group.
4. **Specify the calendar information** you want to share in the dialog window.
5. Click **OK**. Calendar image will render and appear in the body of your e-mail.






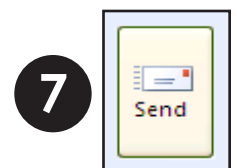
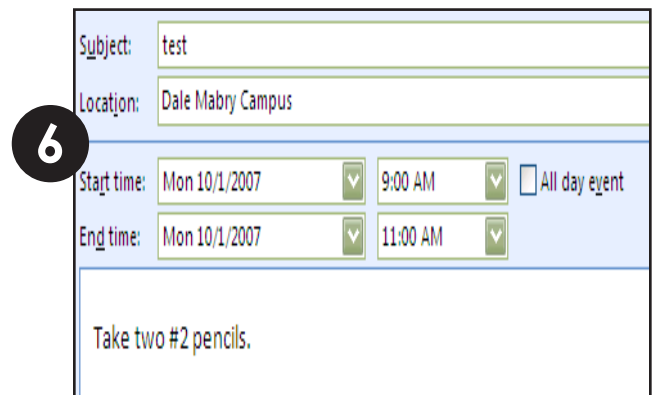
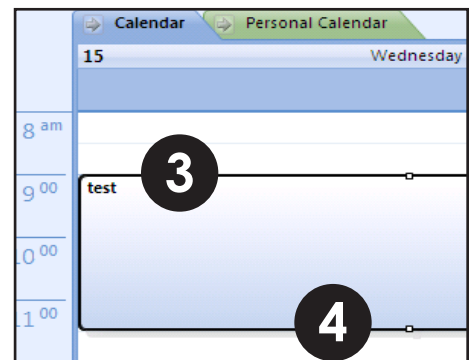
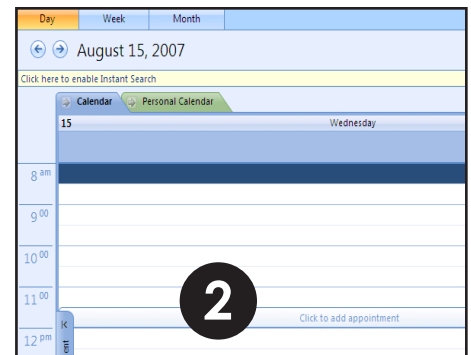
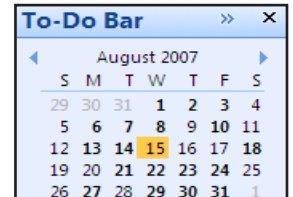
Time Management: Create Appointment

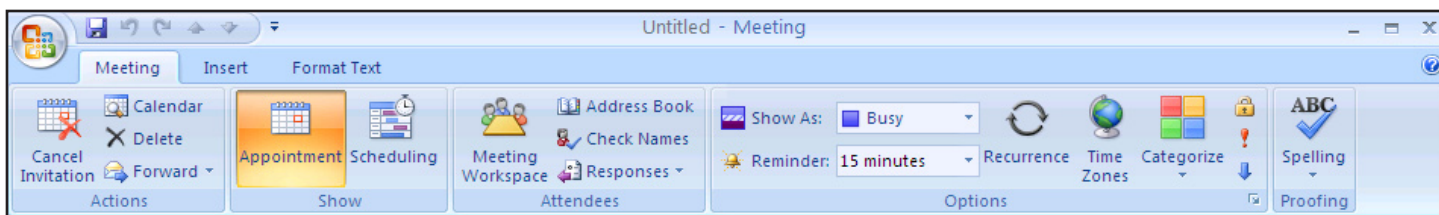
Appointments are activities that you schedule in your calendar that do not involve inviting other people or reserving resources (like in **Meetings**).

Follow these steps to create an appointment:

1. Click on the day you want to schedule the appointment using the **Date Navigator**.
2. The **Calendar** changes to display the **Day** selected. **Highlight** the start time.
3. Click box to add **Appointment**, and **Name** it
4. **Extend** the appointment box, to include **duration time** from start to end.
5. Press **Enter** > **Enter**.
6. The **Appointment Form** window opens allowing you to make changes, add a description, etc. using the Ribbon groups and commands.
7. Click the **Save & Close** button. Your appointment now appears in your calendar.

 An **Event** is an activity that lasts 24 hrs or longer (e.g. Trade Show, vacations, etc.).




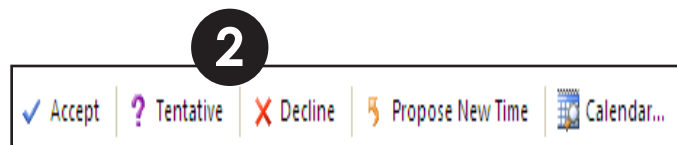
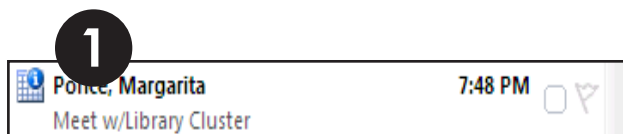


Time Management: Respond to Meeting Request

When you have been invited to attend a meeting, a tentative meeting will appear on your Calendar and the request will appear in your Inbox. Your reply to the meeting request will be sent only to the person who originated the request.

1. **Open** a received invitation.
2. At the top of the message window, **click** the appropriate button (Accept, Tentative, or Decline).
3. A **dialog box appears** with options for your response. **Select** the appropriate option.
4. Click **OK**.
5. **Click Send**. The response is sent and the window closes.

 As the recipient of a new meeting request, you can propose an alternative time to the meeting organizer. When doing this, you can see the times available of all those invited. The organizer can agree to your proposal and send new invitations or reply to you directly.




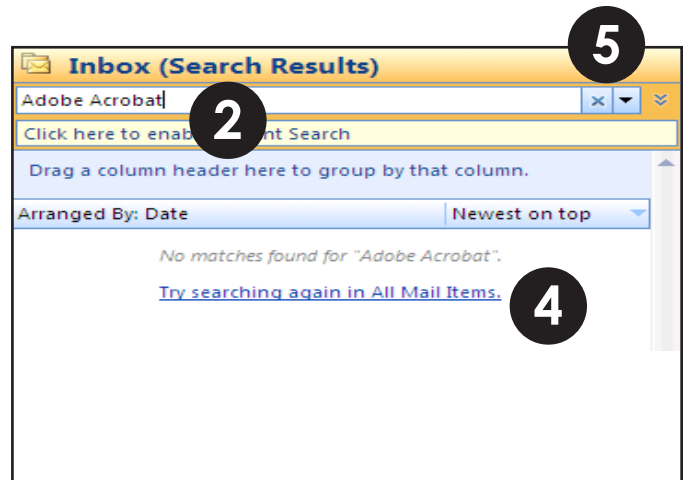
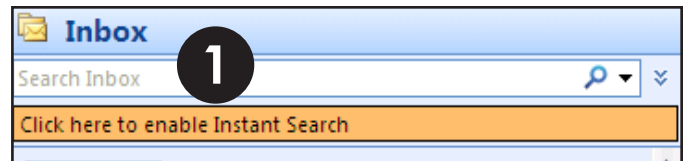
Instant Search

Microsoft **Outlook 2007** provides a new fast way to find your information, no matter which folder it is in. **Instant Search** integrates Outlook with Windows Desktop Search to enable you to almost instantly locate terms in Outlook.

To enable the Instant Search feature in Outlook, you must **download** and Install a component for Microsoft Windows. After installing you must restart Outlook.

Searching in Outlook is easy:

1. Click the **Search Inbox** field.
2. Type a **word or phrase**, then press **Enter**.
3. Outlook performs a search and displays a list of matching items.
4. Click “**Try Searching Again In All Mail Items**” to expand the search to all message folders.
5. Click the  beside the search box to clear the search.





Outlook Help

The best way to become familiar with **Outlook Help** is to use it. The help features can increase your productivity and reduce the time you spend learning to use Outlook.

You can search for information based on phrases or key terms. Follow these steps to use help:

1



1. Click **Microsoft Help**  button on the Standard Toolbar.
2. The **Outlook Help** window opens.
3. At the top of the Outlook Help window type the **phrase** or **key term** in the **Search** text box.
4. Press **Enter**.
5. Select information displayed applicable to your search.
6. Press **F1** key or click  button to **Close Outlook Help Window**.



Final Activity: Module 2

Open the "Writing Tips" e-mail you created and Sent as a Final Activity in Outlook Module I. This message will be integrated as a Task and Scheduled as a Meeting for the new Writing Committee.

You will modify an existing e-mail, integrate a task, schedule a meeting and forward an update to all participants of this workshop, including your instructor. If necessary, you will update your Distribution List to include new workshop participants.

Using these guidelines and the concepts presented in this module complete the tasks listed below.

Perform the following tasks in the order listed:

Part I

1. **Create a Task** from the e-mail message "Writing Tips".
2. **Originate a meeting**, inviting all participants of the Outlook II workshop, including your instructor.
3. **Send** Meeting Request and **attach** the "Writing Tips" e-mail.
4. **Create an Appointment reminder** for the books that you need to pick up at the Bookstore.

Part II

1. **Reply** to Meeting Request from workshop participants with a **new proposed time**.
2. **Search** your Inbox for correspondence from "PDWS".
3. **Close** Outlook.