Microsoft Outlook 2007 Getting Started

Eits
Energy IT Services

U.S. DEPARTMENT OF ENERGY | Office of The Chief Information Officer

Eits
Energy IT Services

Welcome to the Microsoft Outlook 2007 Getting Started Course!

U.S. DEPARTMENT OF ENERGY | Office of The Chief Information Officer

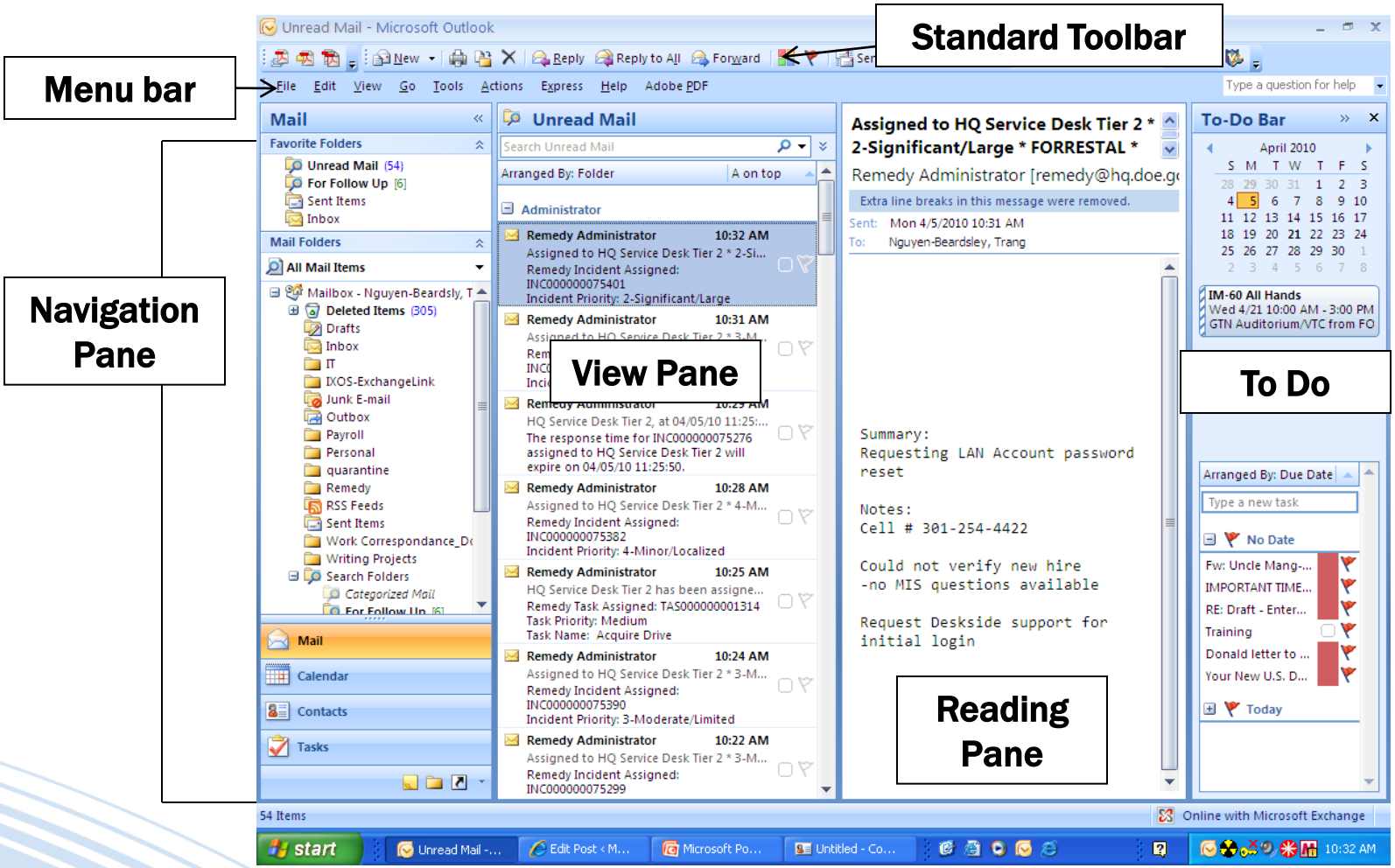
Outlook 2007
Getting Started

- About Outlook 2007: upgraded to improve user time and efficiency. Users can now better organize and locate information, have improved calendar sharing capabilities, and access to SharePoint to share information with coworkers.

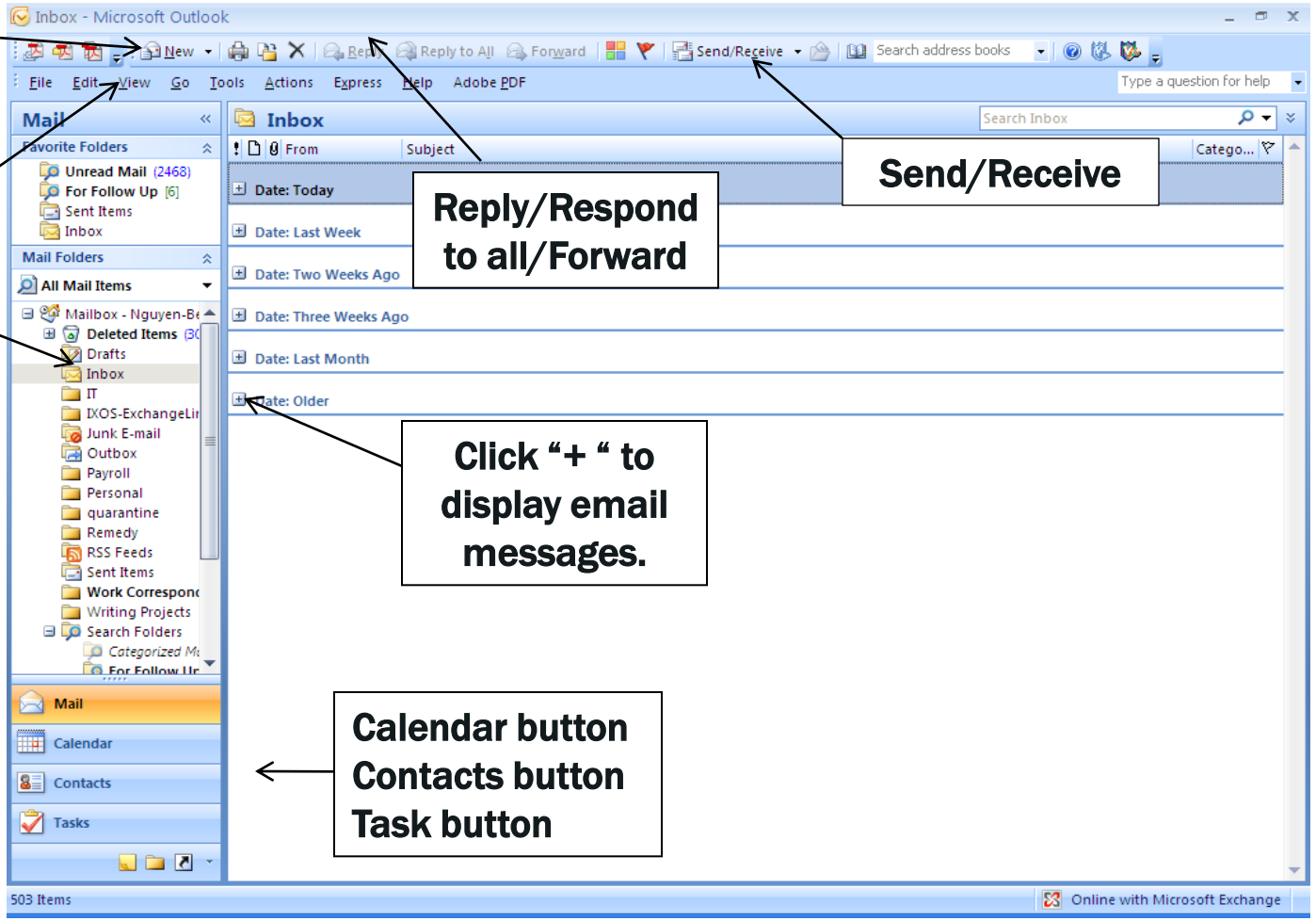
What's New in Outlook 2007?

- To Do Bar
- Color Categories
- Calendar Task Email Integration
- Flagging Email Messages as Tasks
- Advanced Find
- RSS Feed
- Out of Office Notifications
- Previewing Formatting Options Live (Similar to Office 2007)
- Mini Toolbar (Similar to Office 2007)

Outlook 2007 Basics



Outlook 2007 Basics

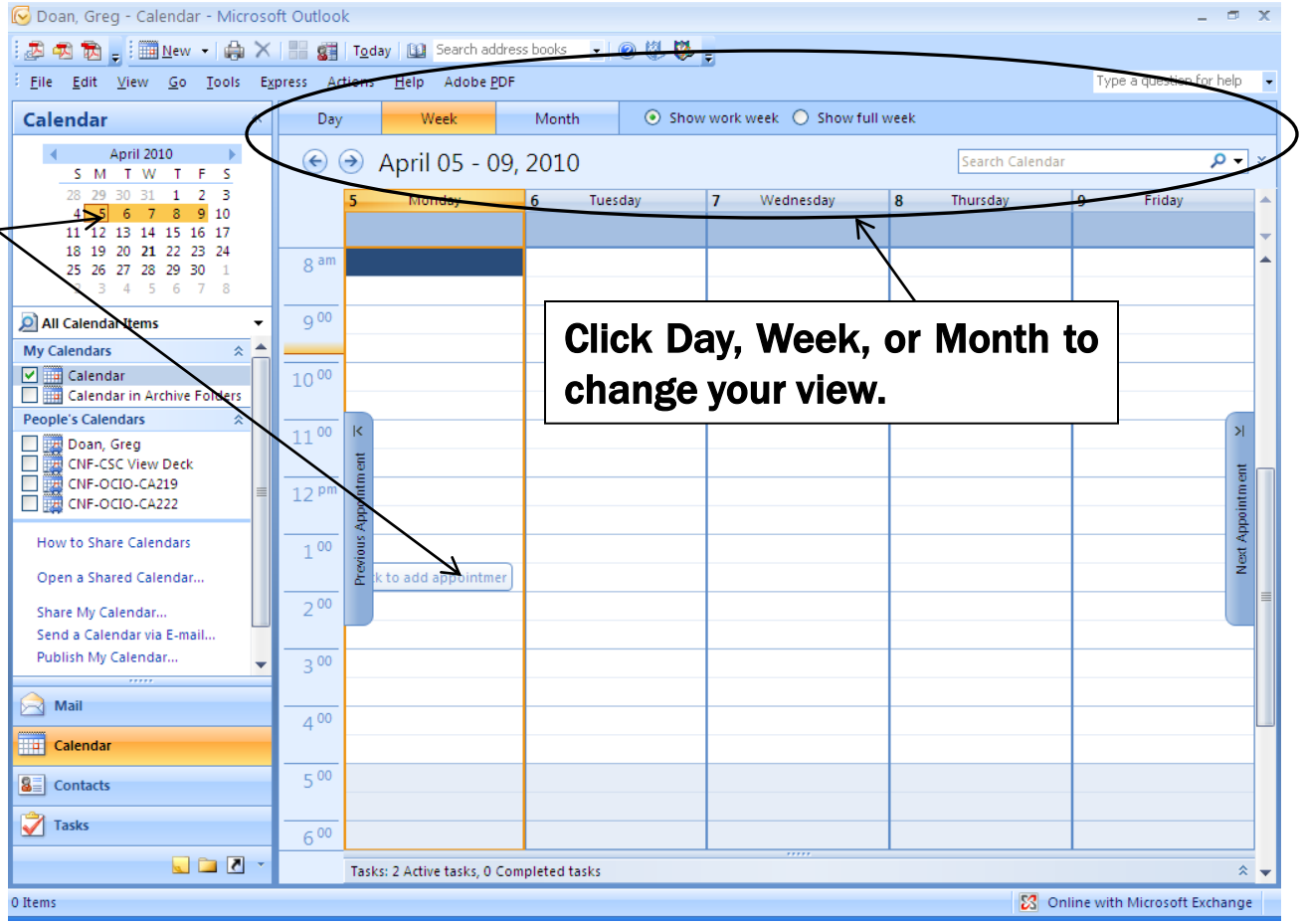


Navigation Options

- **Mail: the main area where you read, compose, receive, and send emails.**
- **Calendar: the scheduler or planner where you can set and manage appointments and tasks.**
- **Contacts: contains your contact list where you store names, email addresses, and other information**
- **Tasks: the task list where you create and manage tasks.**
- **Notes: the notes page where you can create and manage notes.**
- **Folder List: displays all folders in hierarchial format.**
- **Shortcut: displays shortcuts.**

Outlook 2007 Basics: Calendar

Double click on the day of the week or click *New* to add a appointment to your calendar.



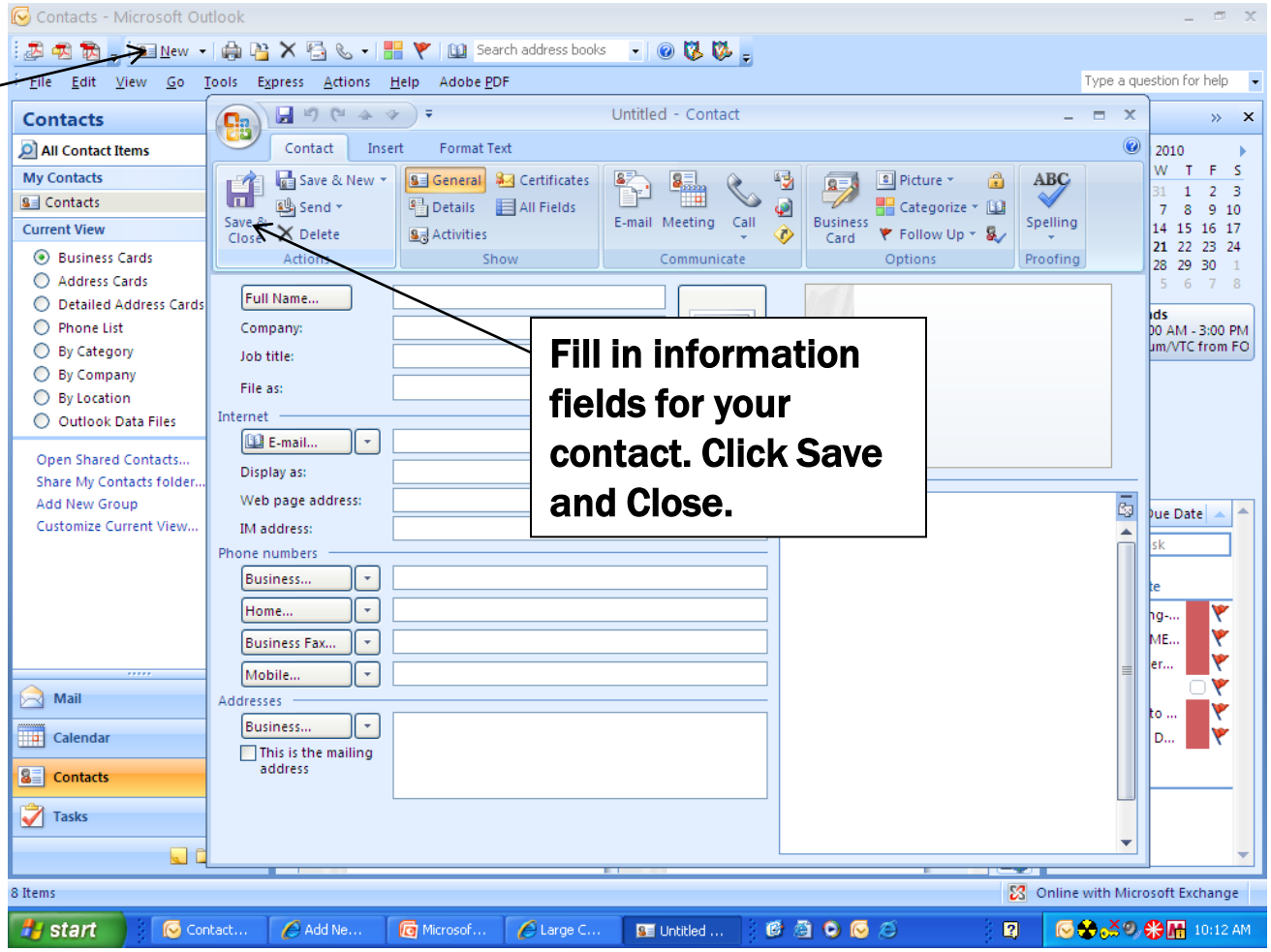
Click Day, Week, or Month to change your view.

U.S. DEPARTMENT OF ENERGY | Office of The Chief Information Officer

Outlook 2007 Basics: Contacts

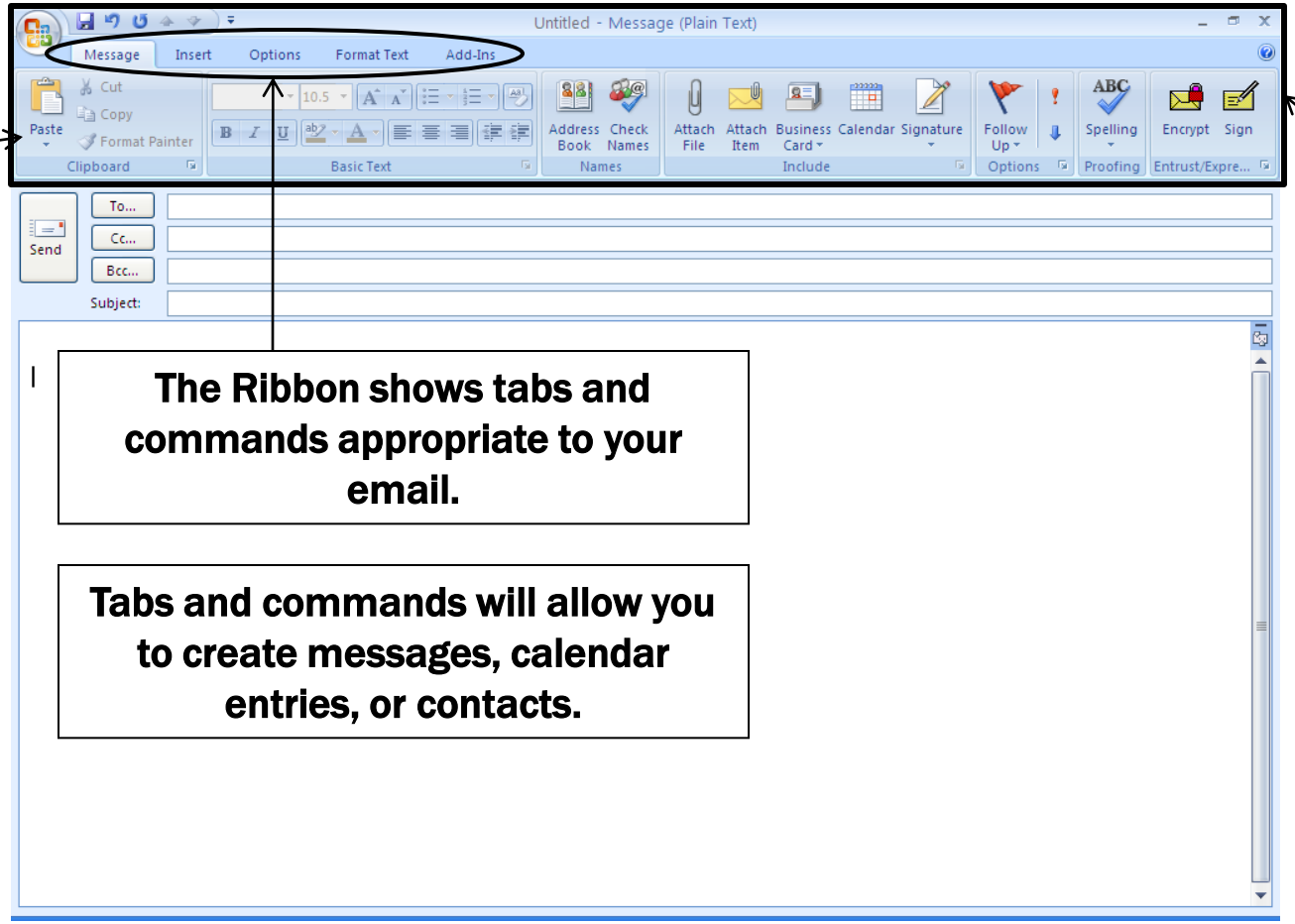
Click *New* to add a new contact to your list.

To add an email address to your contact list from a current message to open it. Right click on the email address in the *From: field*. Choose *Add to Outlook Contacts*. Add additional information. Click *Save and Close*.



Drilling Down into Outlook: Email

The "Ribbons" appear in all new emails messages.

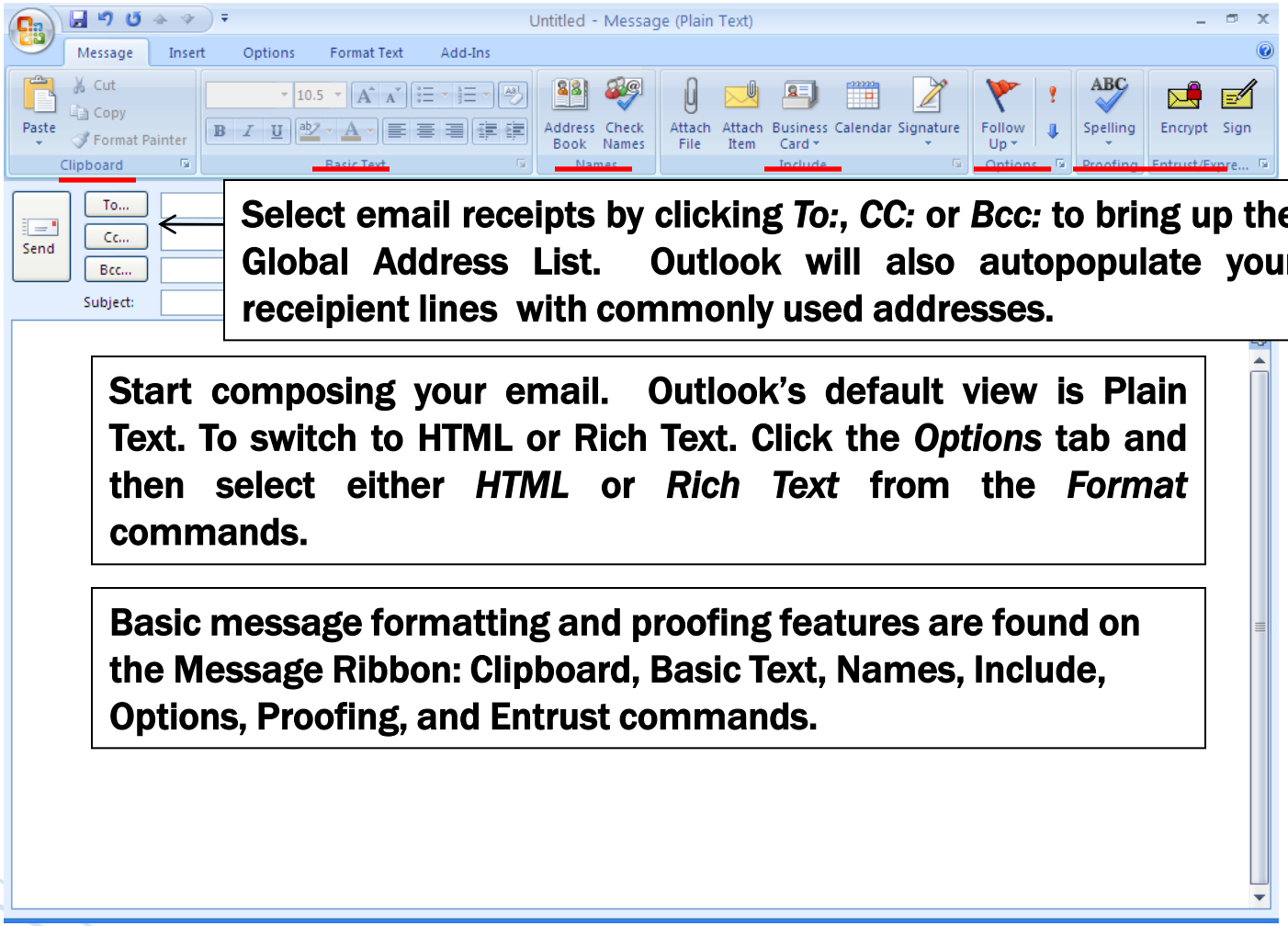


The Ribbon shows tabs and commands appropriate to your email.

Tabs and commands will allow you to create messages, calendar entries, or contacts.

The Ribbon is similar to the Ribbons in Office 2007.

Composing a New Email



Select email receipts by clicking *To:*, *CC:* or *Bcc:* to bring up the Global Address List. Outlook will also autopopulate your receipient lines with commonly used addresses.

Start composing your email. Outlook's default view is Plain Text. To switch to HTML or Rich Text. Click the *Options* tab and then select either *HTML* or *Rich Text* from the *Format* commands.

Basic message formatting and proofing features are found on the Message Ribbon: Clipboard, Basic Text, Names, Include, Options, Proofing, and Entrust commands.

Formatting Your Email

Plain Text vs HTML vs Rich Text

- **HTML:** same format as Web pages, allows you to format text and graphics, but emails tend to be larger in size and fill disk space quicker.
- **Plain Text**: only letters and numbers are transmitted. No formatting of text or graphics.
- **Rich Text**: proprietary to Microsoft emailing software. Only users with Outlook and Outlook Express can see Rich Text. Formatting of text and graphics is available.
- Outlook will transmit reply messages back to the sender in the format it was originally sent in unless you change the format

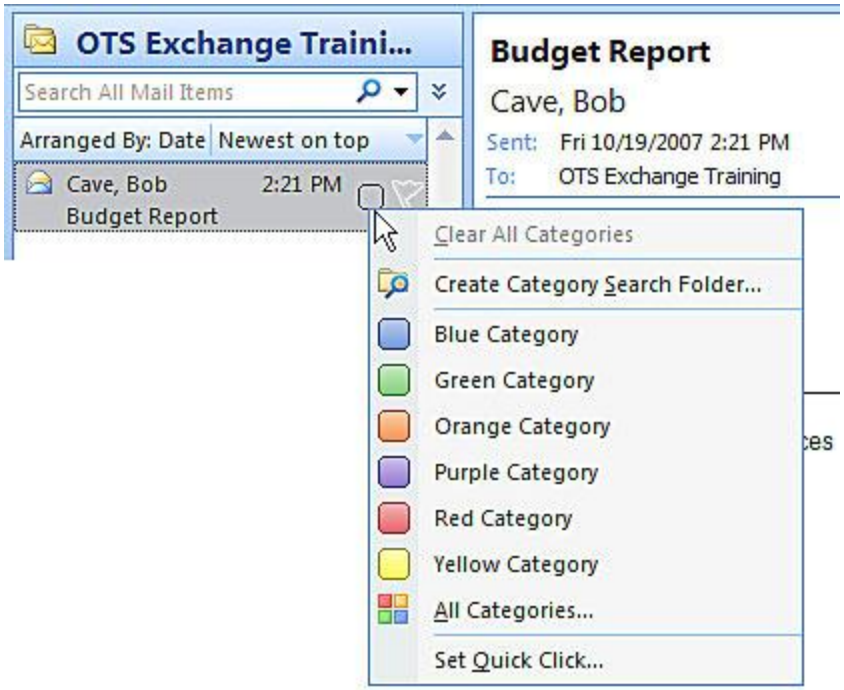
Primary Toolbar/Email Ribbons

- **<u>Primary Toolbar</u>: Similar to Outlook 2003. The Toolbar gives you access to File, Edit, View, Go, Tools, Actions, Express, Help, and Adobe PDF functions.**
- **<u>Email Ribbons</u>: The new email message interface is composed of the task/commands ribbons similar to the ribbons found in Word, PowerPoint, and Excel 2007.** *Note: any functionalities pertaining to formatting will be grayed out unless you set your email formatting to HTML or Rich Text format.*

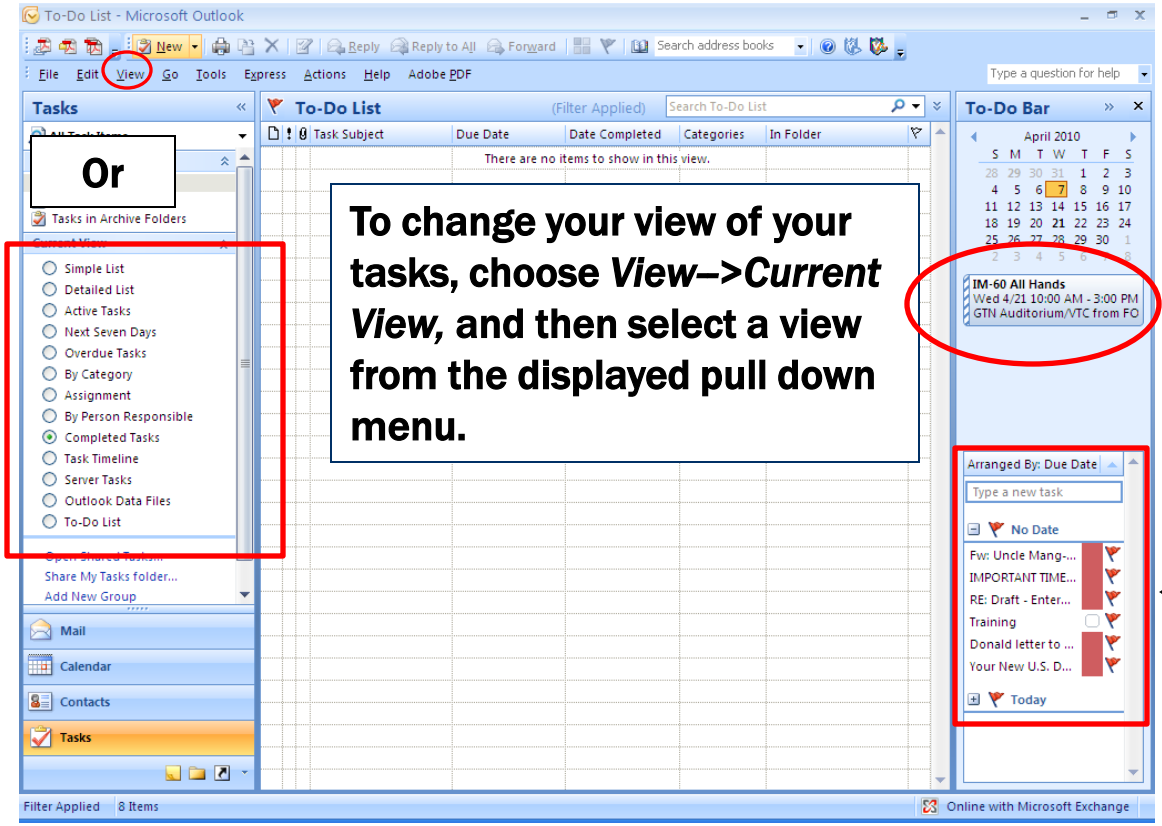
Setting Color Categories

Color Categories can be created for email messages, calendar entries, and task list items to help visually distinguish your items.

❑Select an item. Right click to display the pull down menu, and select *Categorize* to display the *Category* menu.



Setting Up Tasks

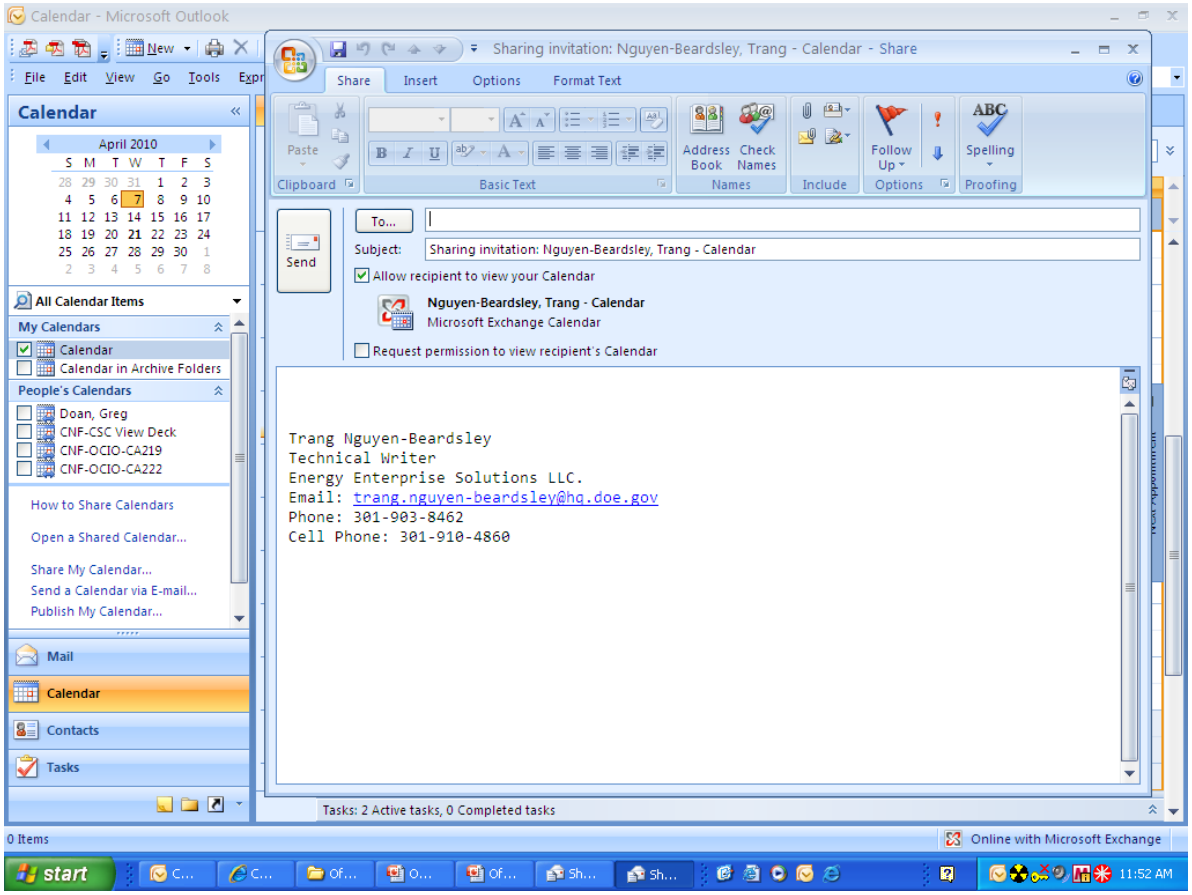


Lists pending appointments.

Insert new task . Tasks display in the list below.

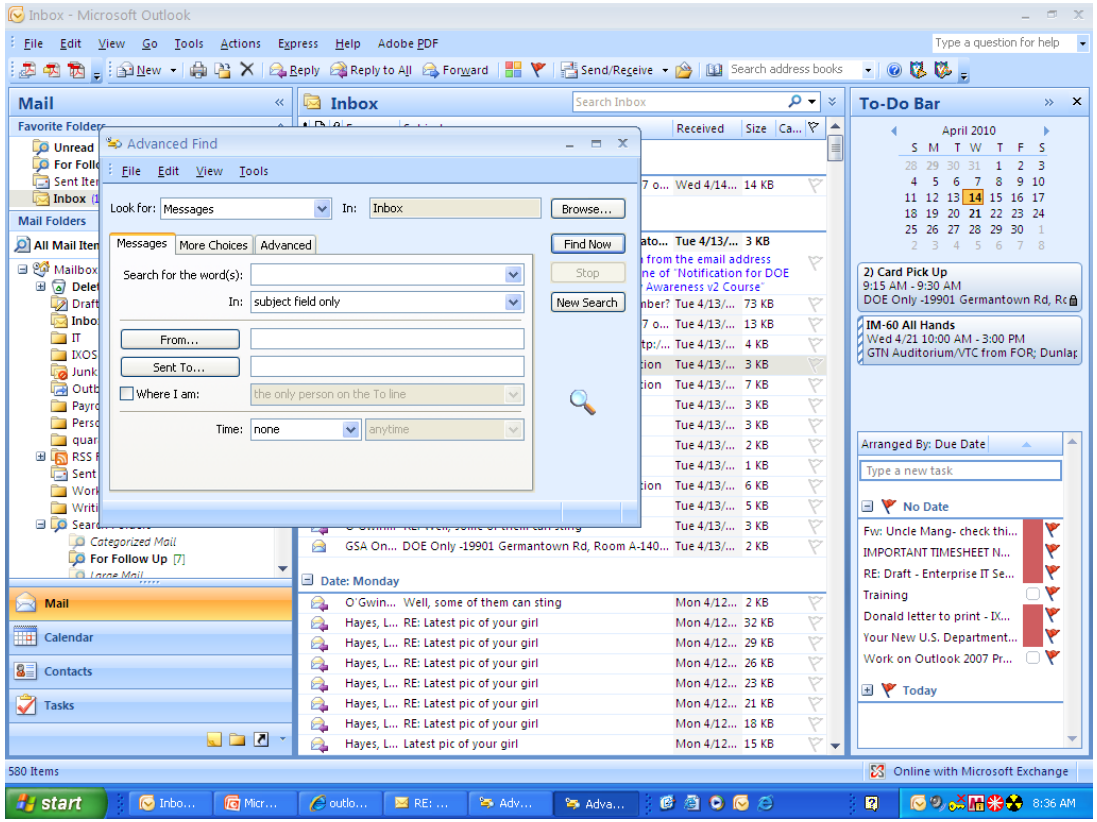
Calendar Sharing

- Click Calendar link.
- Calender-Microsoft Outlook window opens.
- Click *Share My Calender*.
- Sharing invitation: “Inviter’s“– Calendar window displays.
- Select Receipent, format invitation, and click *Send.*



Advanced Find

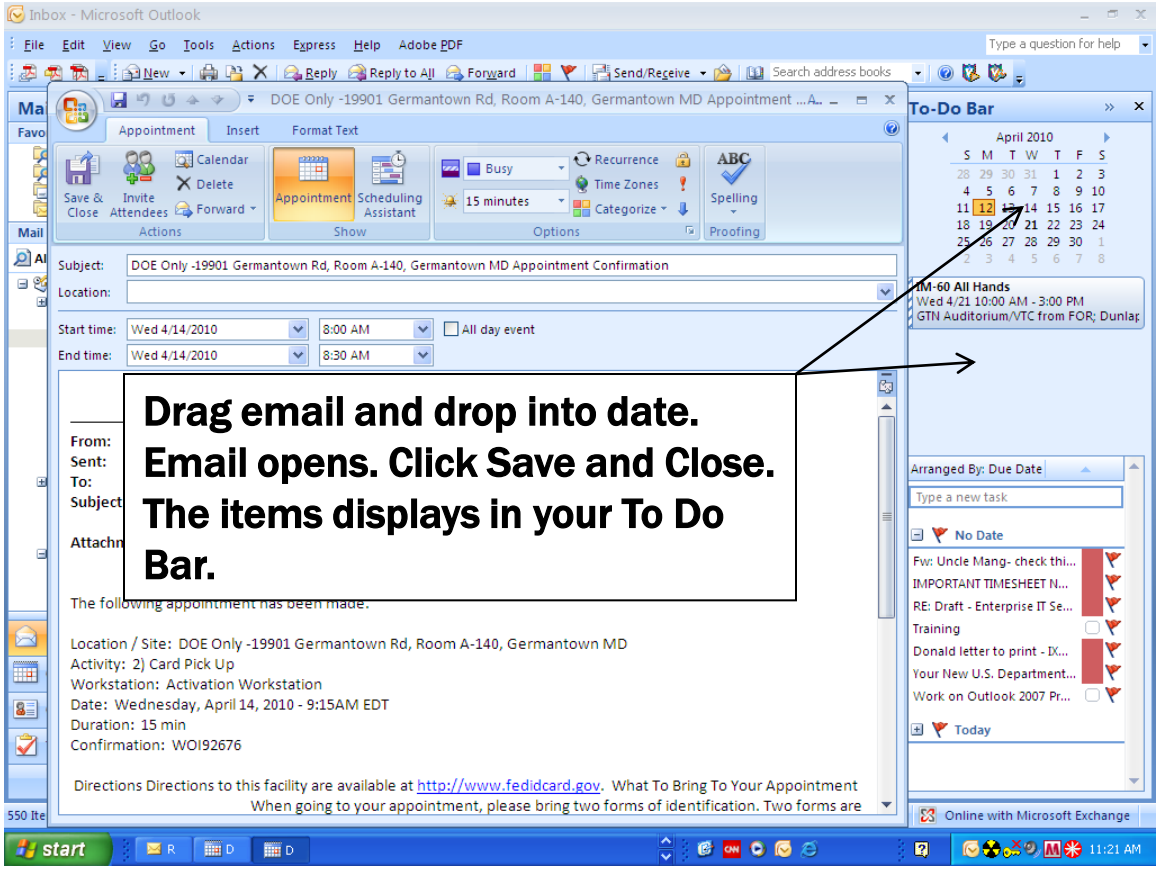
- **Advanced Find: The Advance Find feature provides you with the capability to search for specific Outlook items.**
- **To use the Advanced Find function: select *Tools-> select Instant Search-> select Advanced Find-> set search parameters for item*.**



U.S. DEPARTMENT OF ENERGY | Office of The Chief Information Officer

Calendar-Task-Email Integration

- **Outlook 2007 allows you to drag a task or email onto your calendar and drop it into a particular date and time. In the same fashion, emails can be dragged and dropped into your task or folder list.**

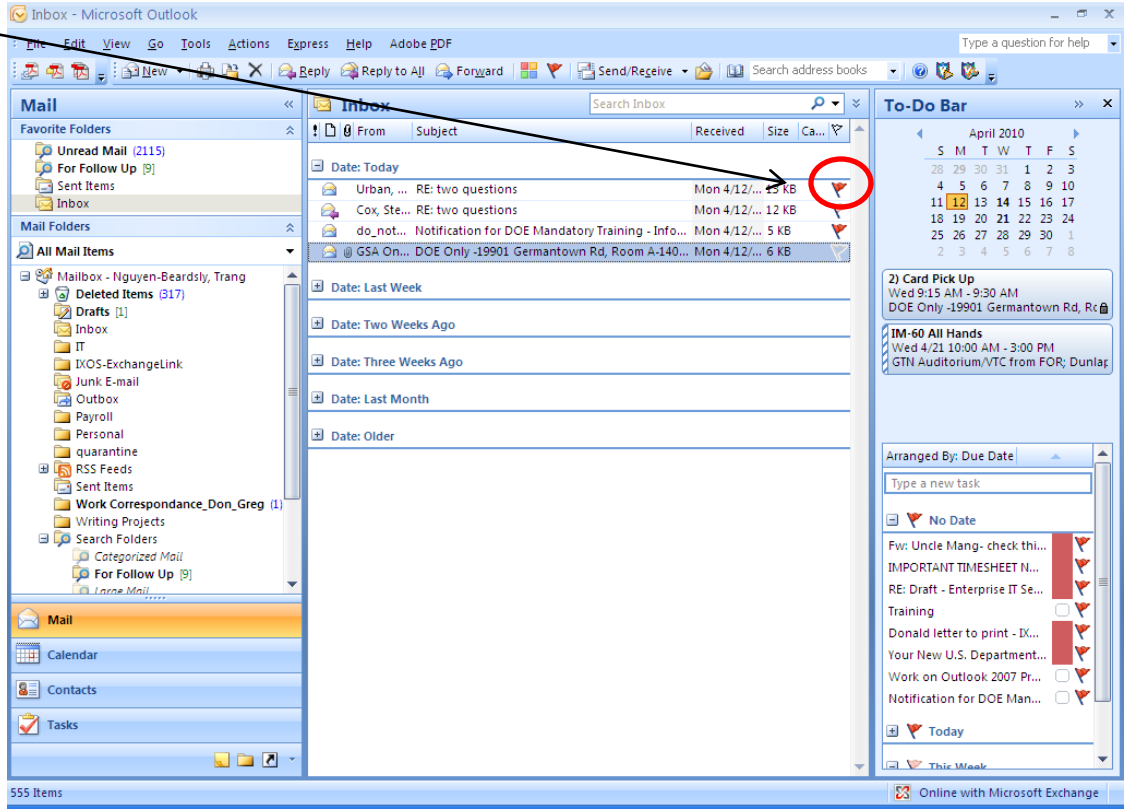


U.S. DEPARTMENT OF ENERGY | Office of The Chief Information Officer

Flagging an Email as a Task

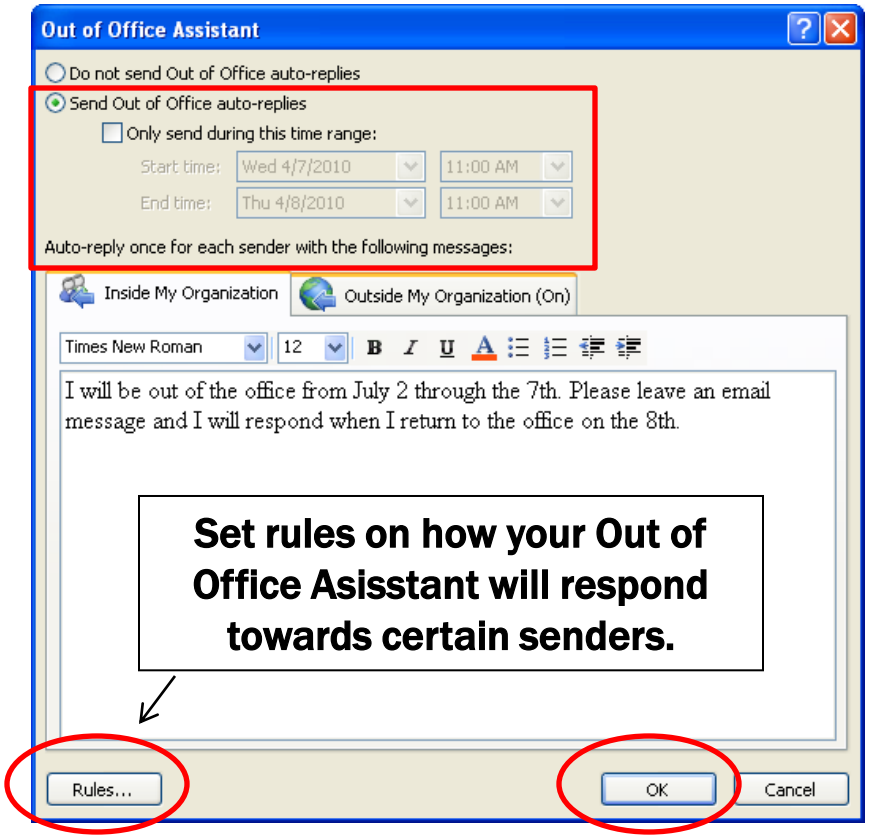
Outlook 2007 allows you to flag your email messages as tasks.

❑Right click the flag symbol next to a message in your email index to generate the pull down menu. Select your follow up time.



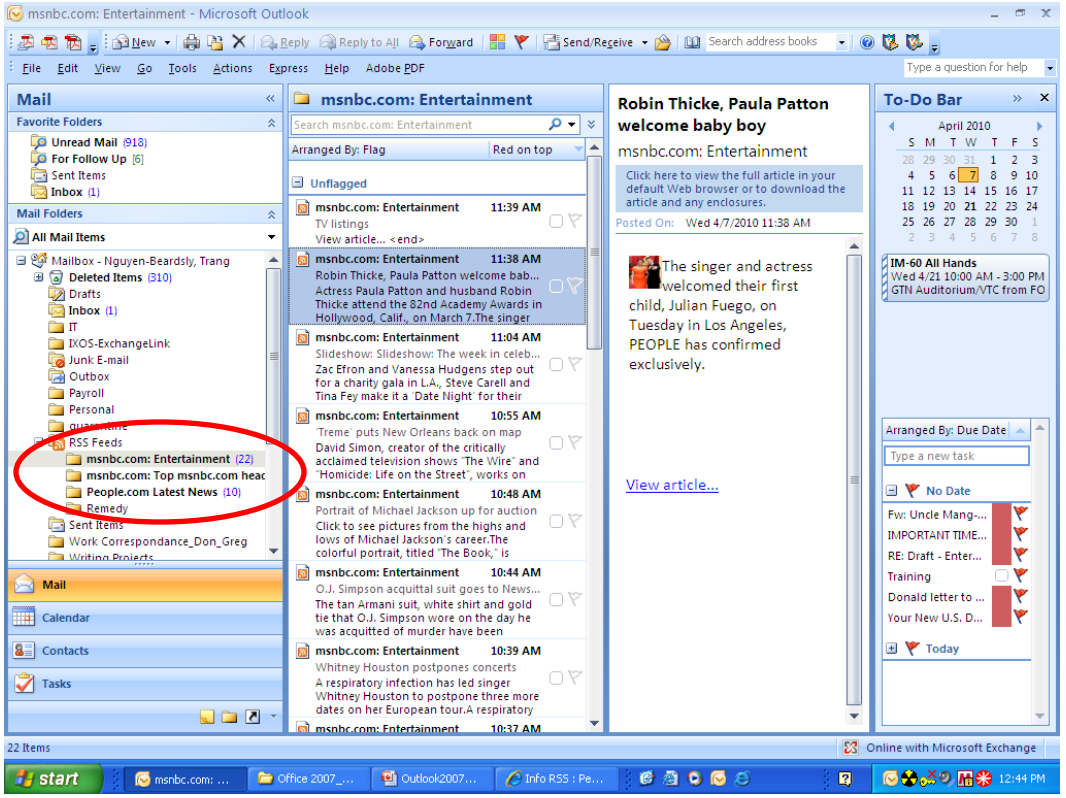
Out of Office Assistant

1. Click *Tools*.
2. Click *Out of Office Assistant*.
3. To set up your Out of Office Assistant, click and set the following per your needs.
4. New Out of Office assistant features
   - ❑ Rich text formatting: Fonts, colors and formatting can be used for your replies.
   - ❑ Start and stop time: You can set up your replies to start and stop with your time away from the office.
   - ❑ Note: Although an "*Outside My Organization*" tab is shown, these messages are not sent due to Cyber Security policy.



RSS Feeds

- Click *RSS Feeds* in the Mail Folders pane.
- Right click to display the pull down menu and select *Add a New RSS* feed.
- Paste the RSS URL into the RSS window. Click *OK*.
- Click *Yes* when the *"Add this RSS?"* window displays.
- The RSS feed displays in the RSS folder and window.



Discontinued/Modified Features

- Outlook native email editor: Outlook 2007 uses an editor based on Word 2007.
- Online meeting support: No longer supported.
- Personal Address Book: No longer supported.
- Email Accounts Wizard: Replaced by account settings dialogue box.
- Task Pad: Replaced by the new To-Do Bar.
- Meeting Updates: All changes made to time and location will require the person to send an update. This also applies to meeting cancellation requests. *Note: the organizer can still change the body, subject line, and reminder without sending an update.*
- Out of date meeting requests: Can no longer be forwarded. Outlook 2007 will send the most updated meeting.
- Follow up flags: Replaced by task flags and color categories.

Discontinued/Modified Features

- Color categories in email messages: Categories can not be sent in email messages.
- Message icon in calendar: Removed from calendar items.
- Follow up button: Replaced by a drop down menu.
- Navigation buttons in Address Book: Left and right buttons have been removed.

Outlook 2007 Short Cuts: Create

Short Cut	Creates
Ctrl+Shift+A	Appointment
Ctrl+Shift+C	Contact
Ctrl+Shift+L	Distribution List
Ctrl+Shift+E	Folder
Ctrl+Shift+M	Email Message
Ctrl+Shift+N	Note
Ctrl+Shift+K	Task
Ctrl+Shift+J	Journal Entry
Ctrl+Shift+Q	Meeting Request
Ctrl+Shift+U	Task Request

Outlook 2007 Short Cuts: Switch To

Short Cut	Switches To
Ctrl+1	Mail
Ctrl+2	Calendar
Ctrl+3	Contacts
Ctrl+4	Tasks
Ctrl+5	Notes
Ctrl+6	Folder List
Ctrl+7	Short Cuts
Ctrl+8	Journal

Outlook 2007 Short Cuts: Helps You Do

Short Cut	Helps You Do
Ctrl+S or Shift+F12	Save
Alt+S	Save, Close, and Send
F12	Save as
Ctrl+Z	Undo
Ctrl+D	Delete
Ctrl+P	Print
F7	Check Spelling
Ctrl+F	Forward

Need Additional Training?

- Go to the Microsoft web site Get Started with the 2007 Microsoft Office System
- Get a copy of Office 2007 through the Microsoft Home Use Program. For more information, contact the ESC Service Desk.
- Office 2007 classes are offered by the Microsoft eLearning Program. For the eLearning classes you must first have Office 2007 installed on your PC. For more information, contact the ESC Service Desk.
- Office 2007 classes are also offered by the Online Learning Center (OLC) - https://olc2.energy.gov. Consult your organization's training coordinator for instructions on how to sign up for training through the OLC.

ESC Service Desk Contact Info

- **Headquarters and Richland:**
  - **Phone: 301-903-2500**
  - **Toll Free: 866-834-6246**
  - **Email: ESC.ServiceDesk@hq.doe.gov**

- **All Other Locations:**
  - **Phone: 505-845-4357**
  - **Toll Free: 888-231-5529**
  - **Email: ESC.ServiceDesk@doeal.gov**

Conclusion

Questions
or
Comments?