

Microsoft Outlook Introduction

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Introduction to Microsoft Outlook 2007

The following module has been designed to offer the user a general introductory overview of **Microsoft Outlook 2007**. The primary focus of the module is to familiarise the user with the Outlook 2007 environment and to provide directions for using the program daily in the work environment.

Overview

Microsoft Outlook 2007 is a comprehensive package that offers the user an electronic diary system whereby appointments, events and tasks can be entered and tracked. Detailed lists of contacts, both personal and professional, can be stored as well as a functional electronic mail component with a large number of beneficial features.

With the introduction of **Outlook 2007** the advanced file sharing facilities have become available which assist the often difficult process of working in a multi-site organisation where each user is able to see at a glance the availability of other members of staff for meetings etc.

Opening Outlook

There are a number of ways to open **Outlook**. Two ways are:

1. Double click on the **Outlook** icon on the desktop. It looks like this:



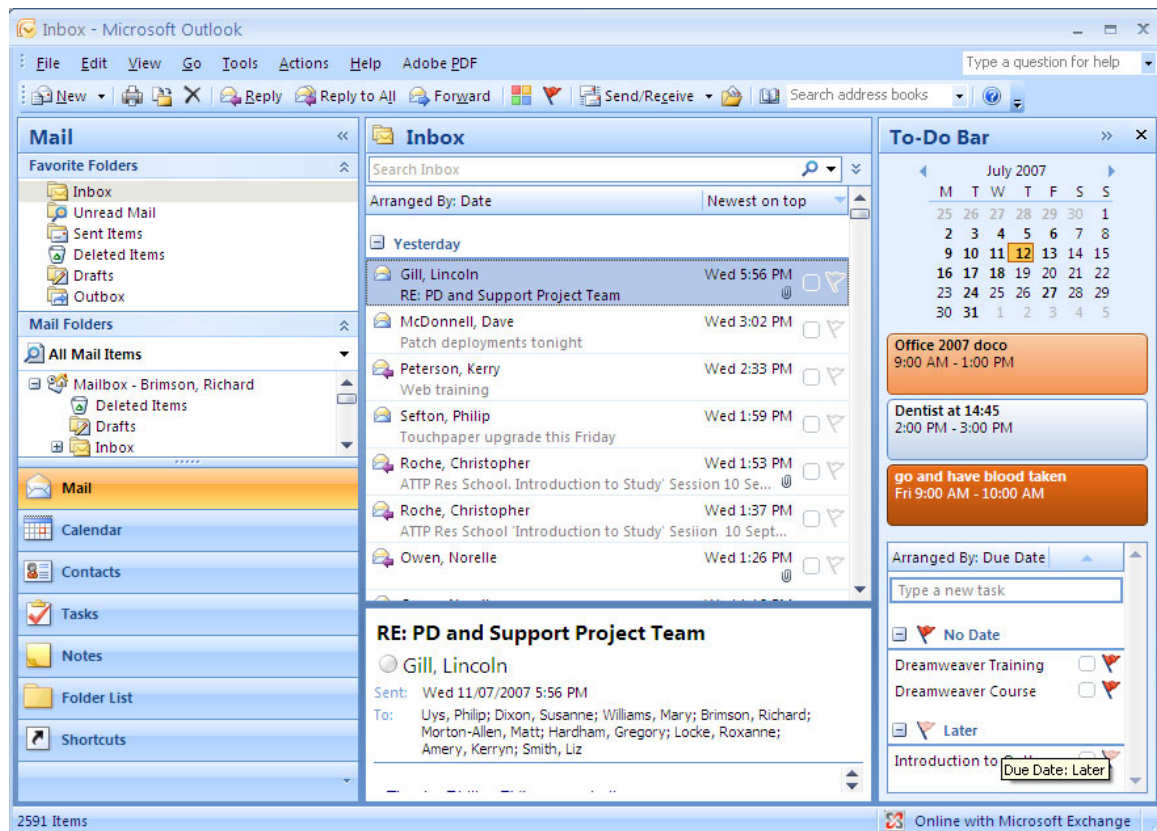
OR

2. Click on the **Start** button located at the bottom of your screen, select **Programs** and click on **Microsoft Outlook**



What Outlook looks like when you open it

When you first open **Outlook** the screen will probably look like this:



Customising Outlook

The window above shows the original view which will be showing when you first open **Outlook**. You can change the way the window looks to suit your own needs and preferences.

The options available within the **View** menu are:

Navigation Pane - you have three choices with this option. They are,

Normal - this shows the folder view as in the above screen shot.
Minimized - this shrinks the panel to a bar down the left hand side.

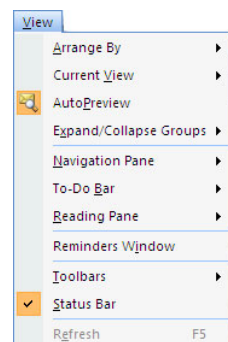
Off - this gets rid of the panel altogether.

To-Do Bar - you have three choices with this option. They are,

Normal - this shows the view as in the above screen shot.
Minimized - this shrinks the panel to a bar down the right hand side.
Off - this gets rid of the panel altogether.

Reading Pane - you have three choices with this option. They are,
Bottom - this shows the view as in the above screen shot.

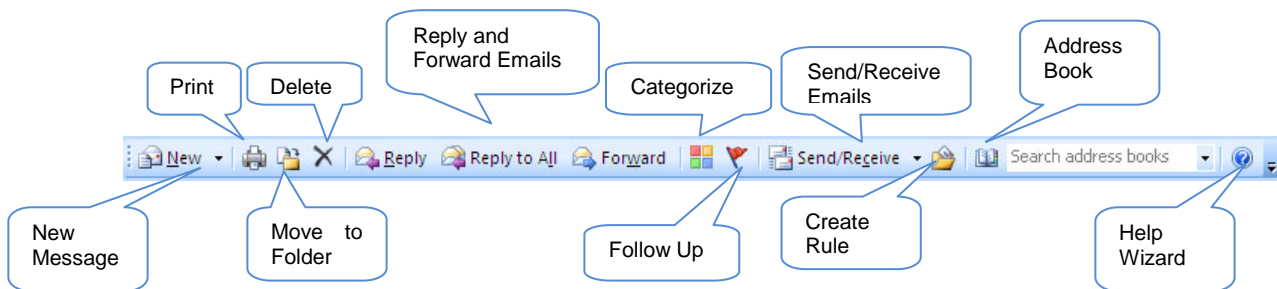
Right - this shows the reading pane to the right of the messages.
Off - this gets rid of the panel altogether.



AutoPreview - hides/un-hides **AutoPreview** which allows you to preview the first three lines of text in a message in the main message window

Standard Toolbar

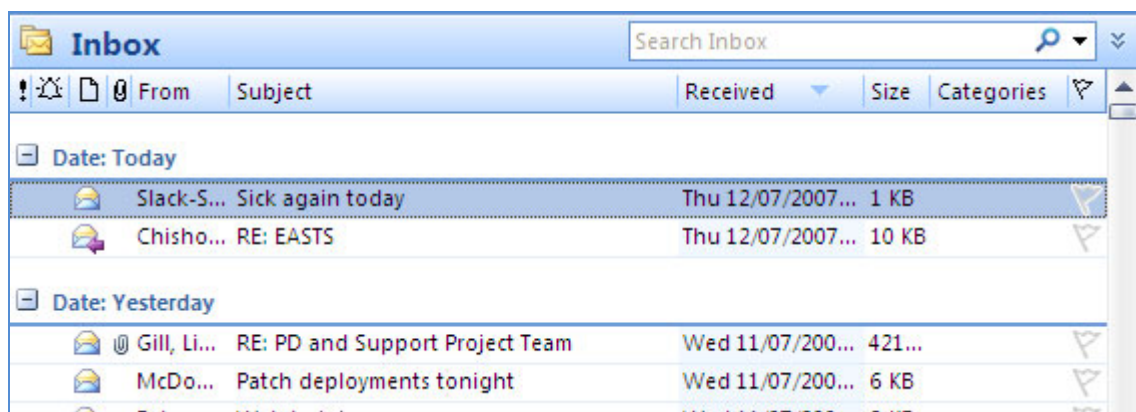
The **toolbars** contain buttons that enable you to perform common tasks without using the menus. The **Standard Toolbar** is displayed automatically when you open **Outlook**. The **Standard Toolbar** displays mainly when you are within the **Inbox**.



We will be looking at most of these in more detail throughout the module.

Reading your Emails


It is very easy to read your emails using **Outlook**. Your messages will appear in the **Message Window** as shown below.




Your messages are usually sorted from the most recent received to the least recent received. There are a number of fields that will help you to identify and sort your messages.

Importance tells you the priority of the message, it can be set to high or low

Icon tells you whether the email has been read or whether it is an archived item

 **Flag Status** tells you whether an item requires your attention. There are several options available for this.

 **Reminder** sorts your mail by using the reminders.


 **Attachment** tells you whether the message contains an attachment

Received tells you when the message was received by your email account

From tells you who the message is from

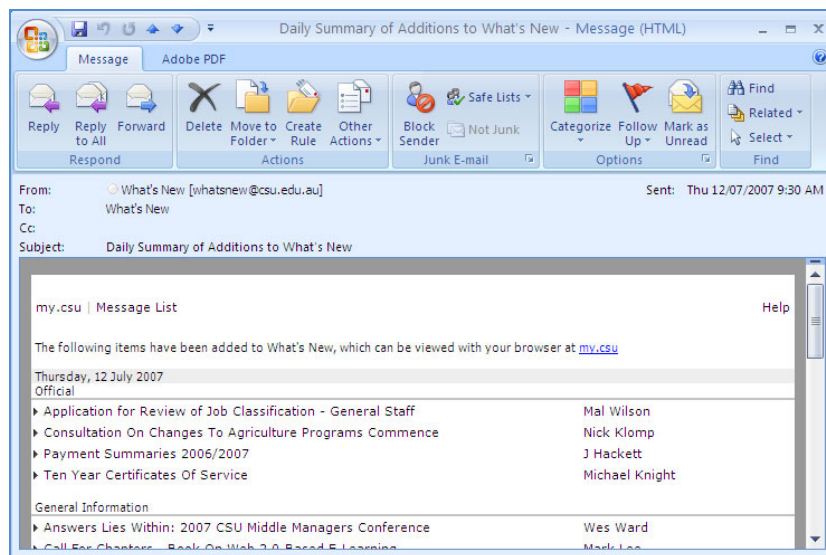
Subject tells you what the message is about

Categorize you can sort your mail into categories and give it a colour to sort by




NOTE: If you click on any of these fields, your messages will be sorted according to what field you clicked on (eg. if you click on attachment, messages will be sorted according to attachments)

You can **open** a message by double clicking the message you want to open in the message pane. The message will then open and it will look like the screenshot below.




When you have read your message you can close it by simply clicking on the

close  button on the top of the message window or you can reply to it, forward it, move it etc.

Managing your Email

Deleting Email

If you wish to **Delete** your message you need to click once on it to **highlight** it and then either click on the **Delete**  button on the standard toolbar, or press the **Delete** key on the keyboard.

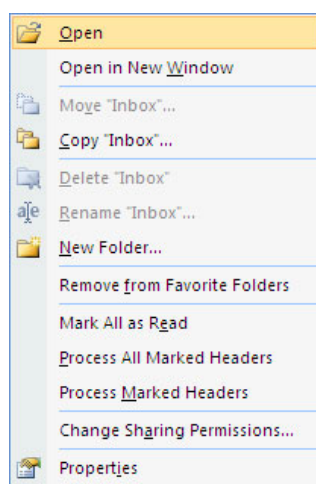
When you delete a message it will move to the deleted items folder where you can retrieve it later. To permanently delete an item from your **Inbox**, press the **Shift** and **Delete** key.

Creating Folders

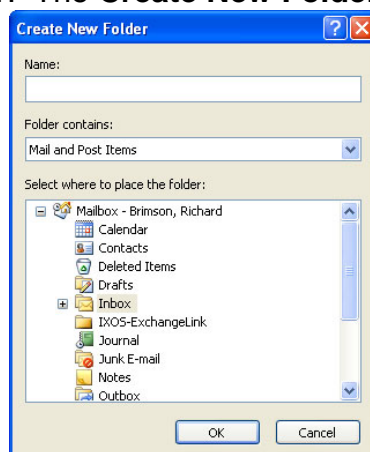
To manage your email, it is best that you create different folders where you can store your emails, that way they are much easier to find than keeping them all within the **Inbox** itself.

To create a new folder:

1. Right click on the **Inbox** in the folder list
2. The following shortcut menu will display




3. Click on **New Folder**. The **Create New Folder** dialog box will display

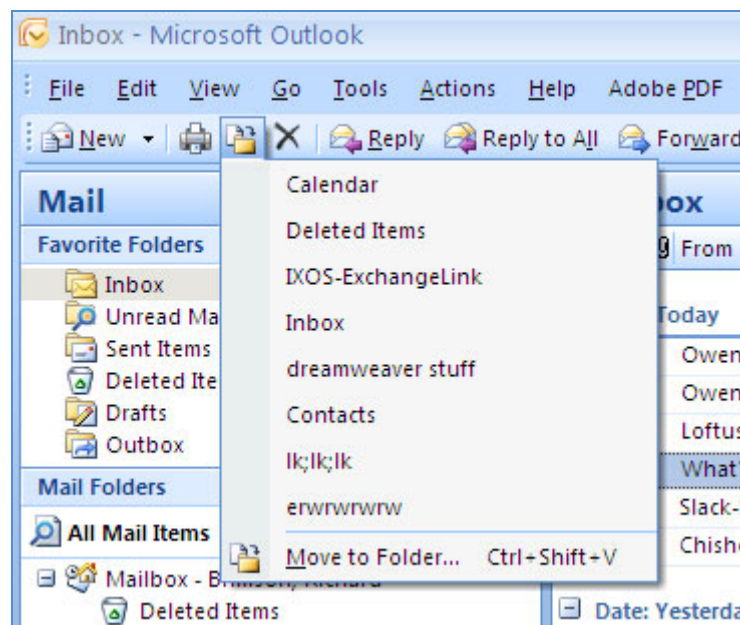


4. Type in a name for your folder in the **Name** field and click on **OK**
5. Your folder will now appear under your inbox in alphabetical order.

Moving Emails

Once you have created your folders, you can now organise your emails by moving them out of the **Inbox** and into the different folders you have created. You can do this a number of ways, the easiest is to click on the message you wish to move, **drag** it to the folder where you want to move it to (wait until the folder highlights) and drop it. The message will be moved from your **Inbox** to the folder you selected.

You can also use the **Move to Folder** button on the standard toolbar. Just click on the message you wish to move. Click on the **Move to Folder**  button and you will have a list of some of your folders that you can move it to.

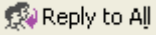


Replying to a message

You may want to send a reply to the message you received. You can do this either while the message is open or from the **Inbox**.

You have two different options you can use when replying to a message, you can either **Reply** or **Reply to All**.

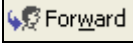
 **Reply** will send a message to the person who sent it to you.

 **Reply to All** will send the message to everyone listed in the original email


To reply to the message, just click on either of these options on the toolbar. You will then see a window with the email address of the original sender already in the **To** field and you will be able to type in your reply in the message body area and send it back to the sender by clicking on **send**.

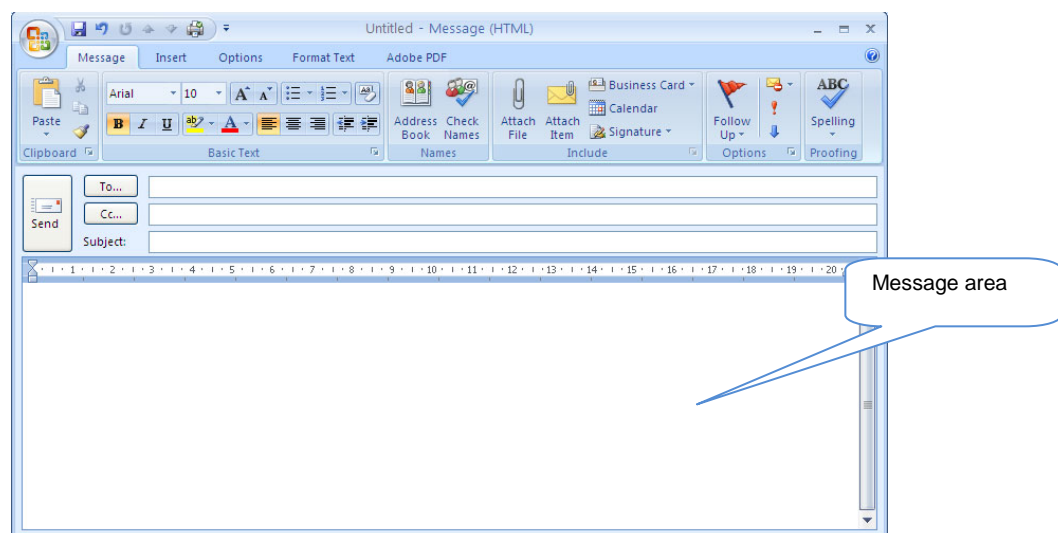
Forwarding a message

Sometimes, you may want to send the message you received to someone else.

To do this, click on the **Forward**  button on the toolbar and a message window will appear with a blank address bar ready for you to put in the email address of the person to whom you wish to send it. The original message will be attached and you can either type in some extra information if you need to or just click on **Send**.

Creating New Messages

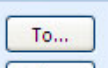
When you wish to compose and send a message you will need to use the **New message**  button. When you click on this button, an untitled message window will display.

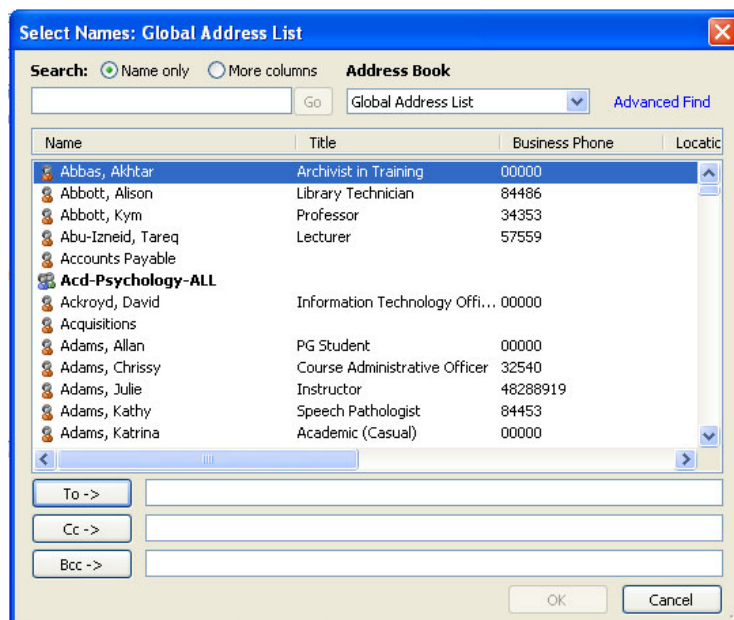


You will need to follow a few steps to successfully send a message. These are:

1. Enter the email address of the person to whom you are sending the message in the **To** field
2. Enter a subject for the message in the **Subject** field
3. Type in the details of your message into the message area
4. When you have finished composing your message, click on **Send**

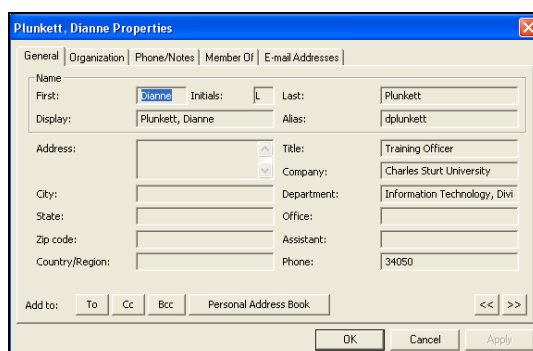
Selecting Recipients

Instead of typing in an email address manually, you can select recipients from the address book. To do this, click on the **To**  field and the **Select Names** dialog box will display.



To find a staff member in the **Global Address List** you can either scroll through the alphabetical list or enter a few letters of the staff member's surname in the **Type Name or Select from List** field. This will automatically scroll through the list to the information you have entered.

When you have found the name of the person you are looking for, click once on the name to select it then click the **To**, **Cc** or the **Bcc** button to add it to that field. If you then double click on the name in the **To**, **Cc** or **Bcc** field, you can find out more information about that person such as their Position Title, Department, phone extension etc.



To – is the person the message will be sent to

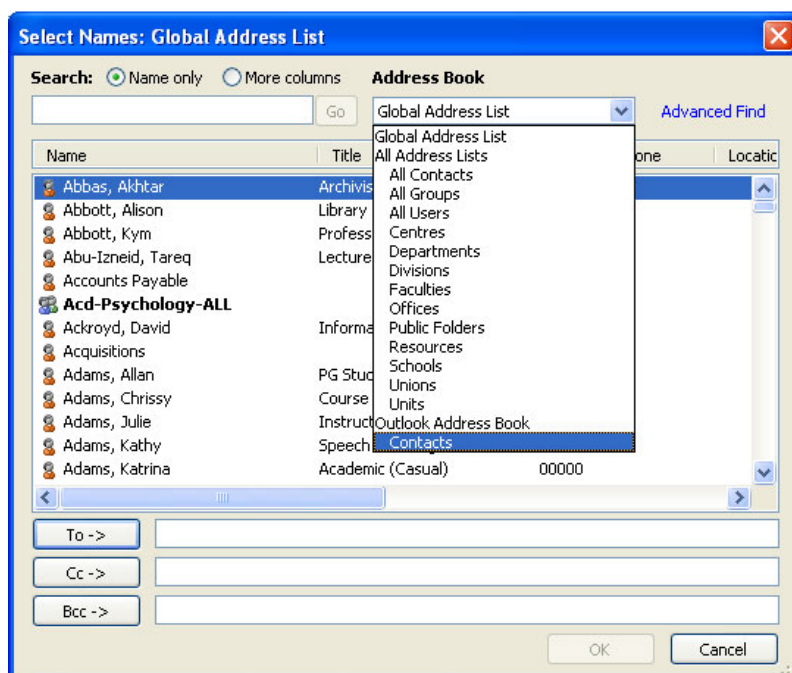
Carbon Copy (Cc) – will send a copy of the message to someone else

Blind Carbon Copy (Bcc) – will send a copy of the message to another person without the other recipients knowing that anyone else has received a copy

If you wish to send the message to more than one person you just need to repeat the process. You can add as many recipients as you wish.

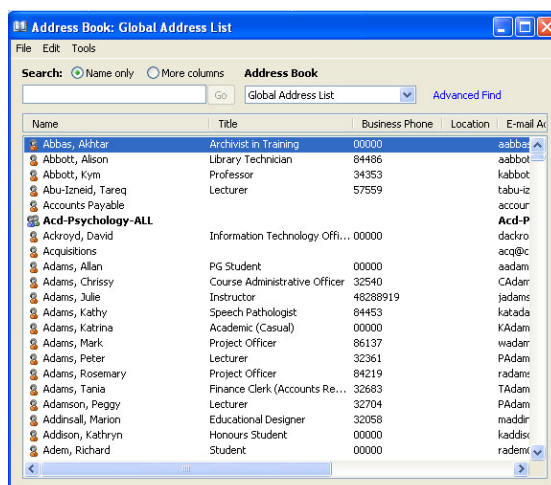
Contacts

You can use the **Select Names** dialog box to also find people that you have listed in your **Contacts** address book. To do this, select **Contacts** in the **Address Book** field and complete the same steps to find the names as you did with the **Global Address List**.



Using the Address Book

You can click on the **Address Book**  button on the **Standard toolbar** to find details about University Staff and your contacts without sending a message to them. When you click on the **Address Book** button, the **Address Book** dialog box will display.

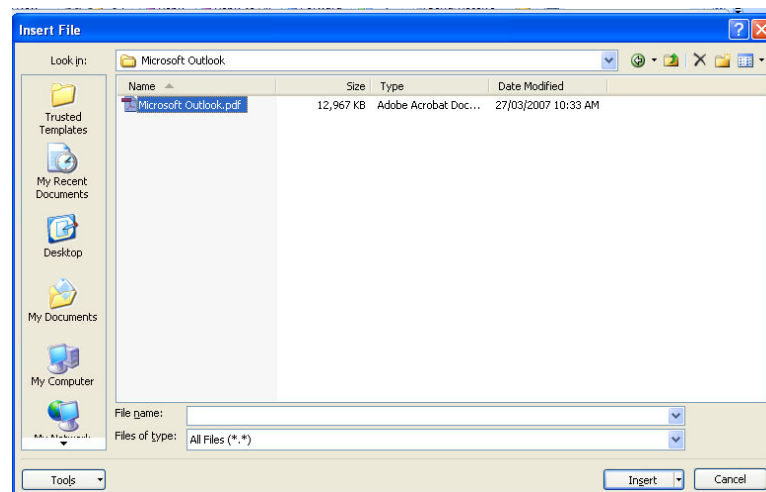
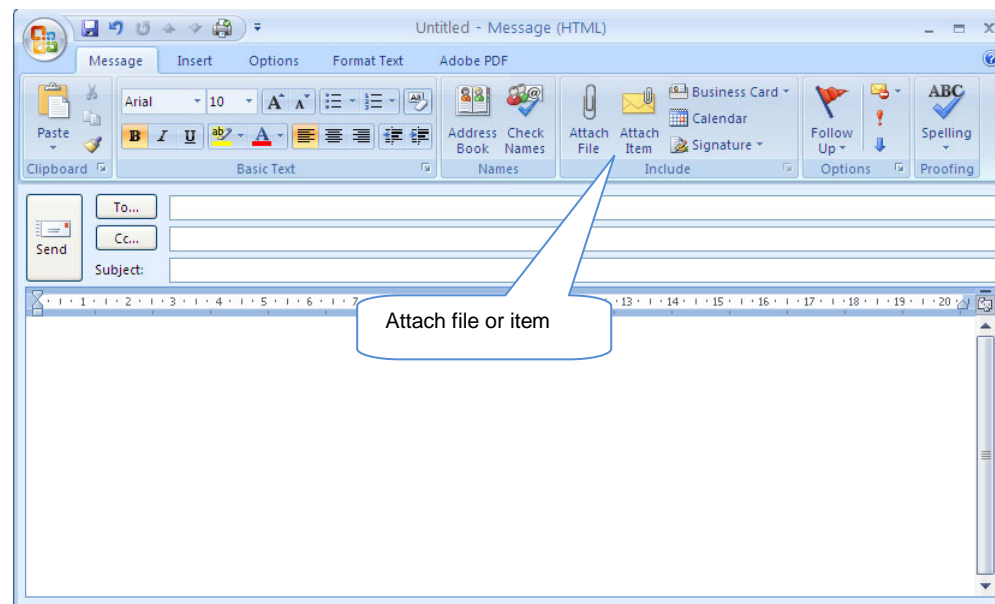


The **Address Book** works the same way as the **Select Names** dialog box, so to search for people, follow the steps listed in the section on **Selecting Recipients**. To see the **Properties** of the staff member, double click on their name in the address book.

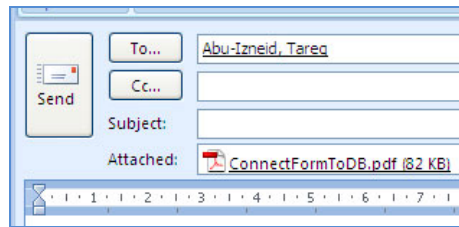
Attachments

Adding Attachments

To add an attachment to a message you are creating, click on the **Attachment** button in the Message tab inside the Include group.

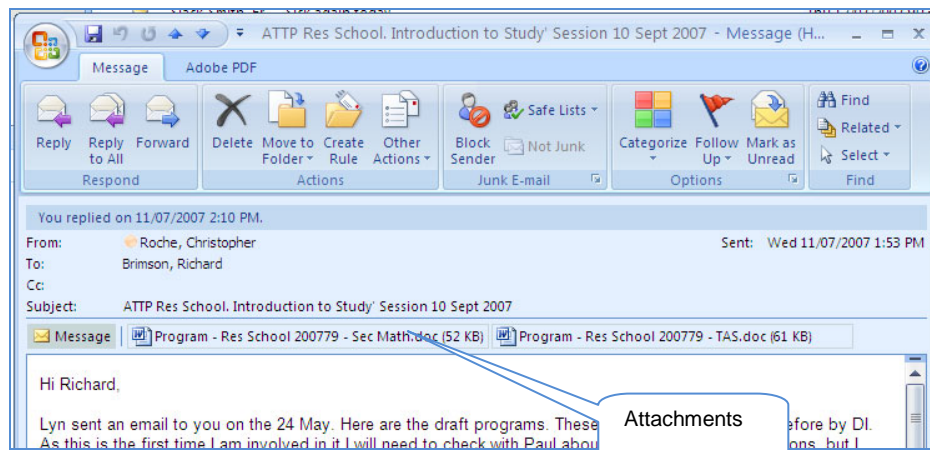


1. Click on the **Attach file** icon to navigate to where the file is saved
2. Select the file
3. Click on **Insert**
4. The file will now be located in the **Attached** field of your message.



Opening an Attachment

If someone has sent an attachment to you it will look something like this:



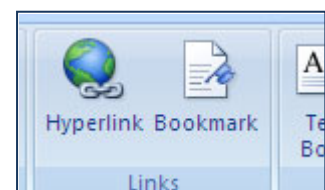
To open the message, double click on the name of the attachment. When you have opened your message you have the option to save it for further use. If you want to save the attachment, choose **Save As** and navigate to where you want to save the file.

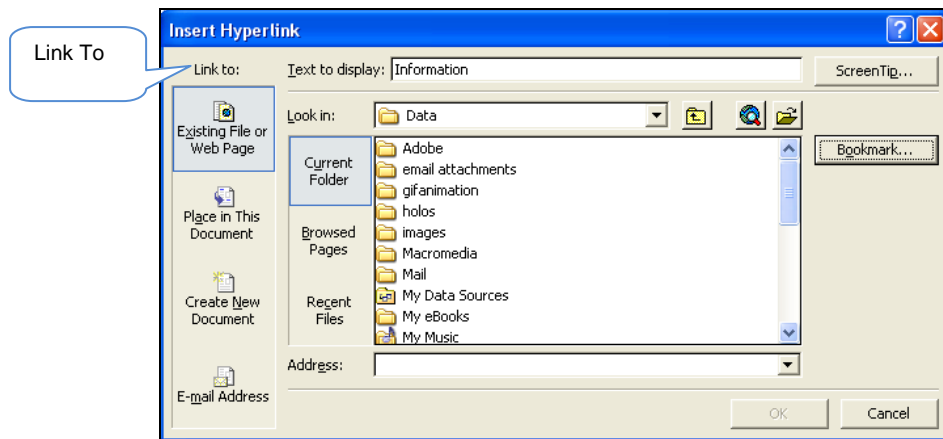
Hyperlinks

In **Outlook**, a hyperlink is a connection from your email message to a Web page, file or email address. The hyperlink itself can be text or an object such as a picture, graph or shape. **Hyperlinks** become active when you open your email message.

To insert a hyperlink into your email message:


1. Highlight the text in your message where you wish to create the hyperlink
2. Click on the **Insert tab** and in the links group select **Hyperlink**
3. The **Insert Hyperlink** dialog box will display








You have a number of options within this dialog box, let's look at some of these.


On the left hand side, you will notice a number of options under the words **Link to:**. These will determine the type of hyperlink you create and when you click on these different options, you will notice some changes to the **Insert Hyperlink** dialog box as it will change some of the fields to match the option you've selected.

 **Existing File or Web Page:** allows you to create a link to a web page. When you have selected this option, navigate to the file you want to link to in the **Look in:** field or type in the **URL address** in the **Address** field.

 **Place in this Document:** allows you to create a link to a place within the message. When you have selected this option, select the part of the message you want to link it to.

 **Create New Document:** allows you to create a link to a new document that you create. When you have selected this option, type the name of the **new file** in, and select either **Edit the new document later** or **Edit the new document now**

 **Email Address:** allows you to create a link to an email address. When you have selected this option, type in the **email address** in the **E-mail address** field and type the **subject of the email message** in the **subject** field.

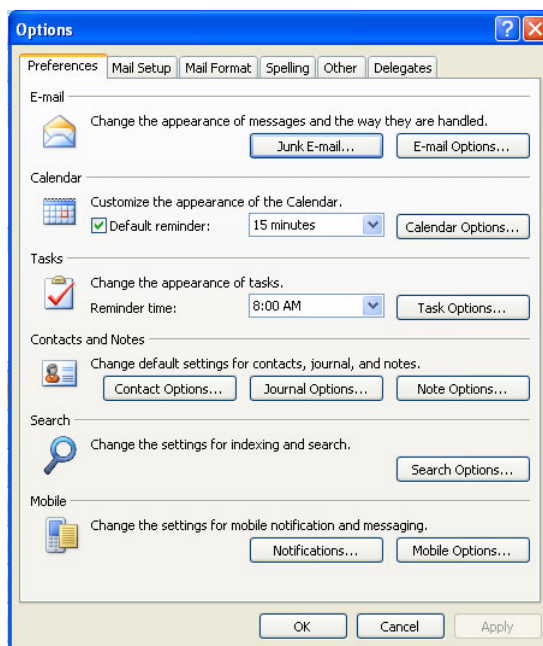
 **NOTE:** You can add a hyperlink to a file on the **S:** drive using the **Existing File or Web page** option so that staff can automatically open the document from the link. Just remember that the person accessing it needs to have access to that part of the Shared drive.

Signatures

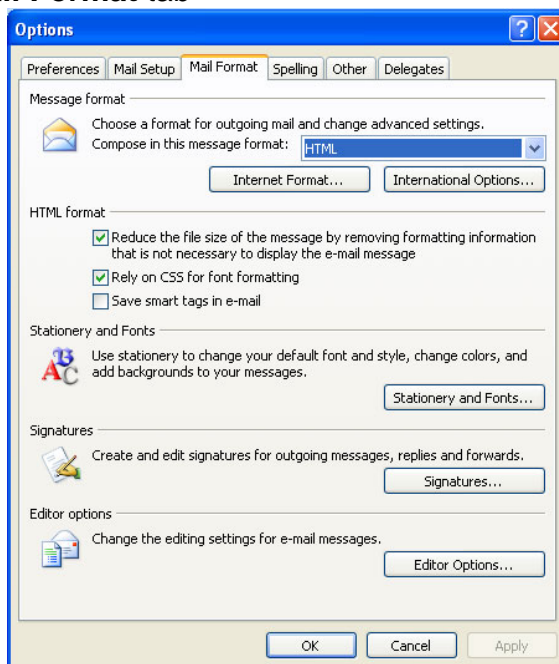
You can create a signature so that it will automatically appear in any message you send. As per the style guide include your title/ department/ phone number and the University's address so that it is easy for people to contact you after they receive your message.

To create your signature

1. Click on the **Tools** menu and select **Options**. The **Options** dialog box will then display

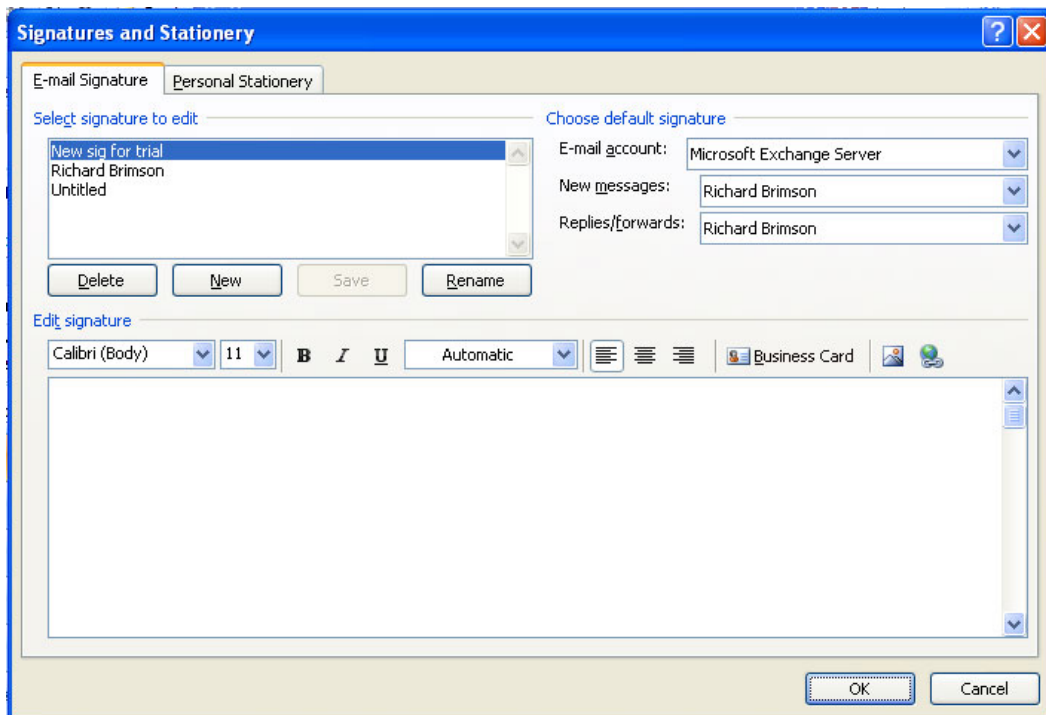


2. Click on the **Mail Format** tab

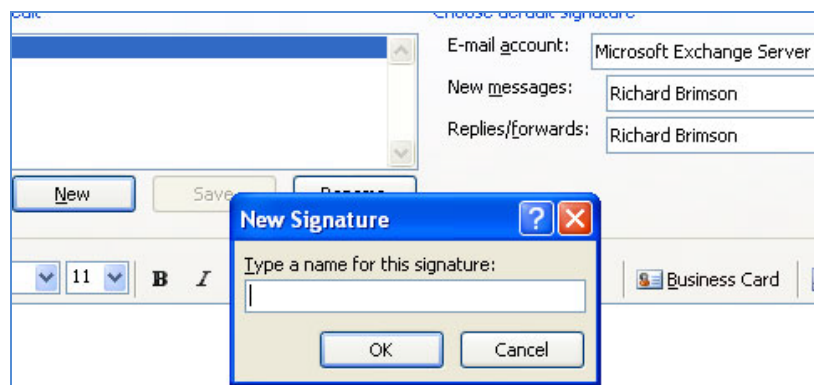


3. Click on the **Signatures** button on the bottom of the dialog box

4. The **Create Signature** dialog box will then display



5. Click on **New**. The **New Signature** dialog box will then display

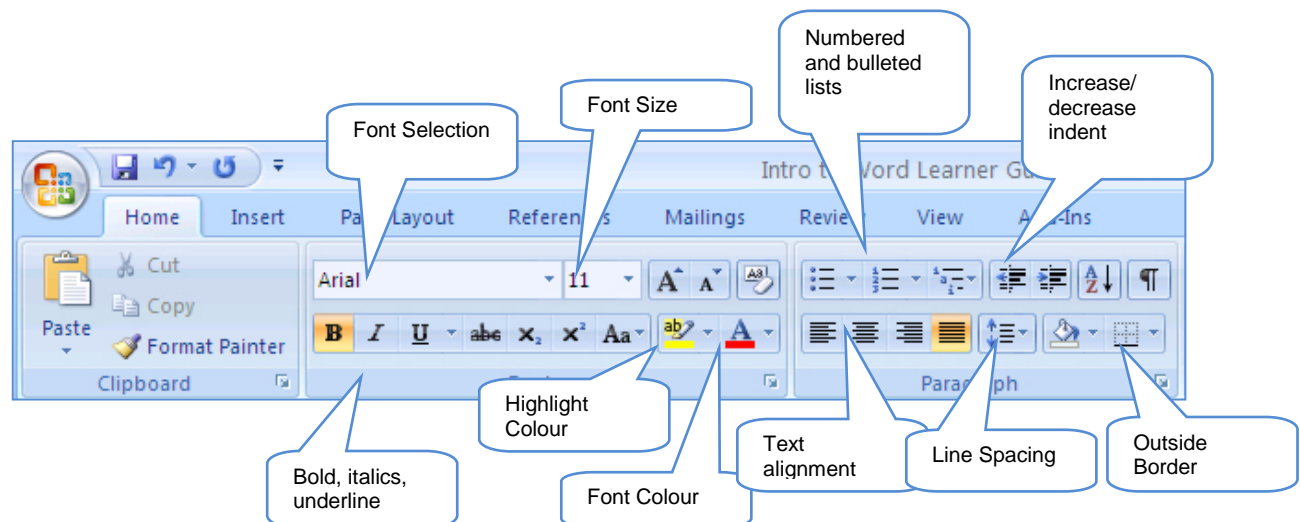


6. Type in a name for your signature and click on OK. Then design your signature.
7. If you go to the CSU Style Manual <http://www.csu.edu.au/division/marketing/stylemanual/appli/email.html> you will find the correct information to add to your signature.
8. Click on **OK** and you will return to the **Options** dialog box. Click on **Apply** and **OK** to complete your signature
9. If you create a new message now, you will notice that your signature automatically appears in the message.

Formatting text

You can change the appearance of text in your message by changing its attributes. This includes font, size, style, effects and colour.

The **Format Text** tab is the easiest way to change many attributes of text.



Styles - Styles allow you to quickly format a document with a consistent and professional look.

Font Selection - Click the arrow to the right of the font name box to view the list of fonts available. Scroll down to the font you want and select it by clicking on the name once with the mouse.

Font Size - Click on the white part of the font size box to enter a value for the font size or click the arrow to the right of the box to view a list of font sizes available. Select a size by clicking on it once.

Bold, Italics and Underline - Formats text to be bold, italicise and underlined

Text Alignment - Text can be aligned to the left, center, or right side of the page or it can be justified across the page.

Numbered and Bulleted Lists - Adds bullets or numbers to the paragraph


Increase/Decrease Indent - Change the indentation of a paragraph in relation to the side of the page.

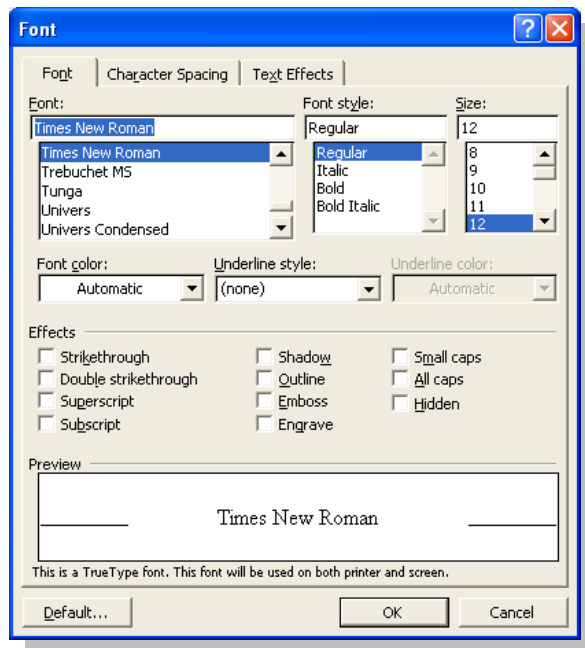
Outside Border - Add a border around a text selection.

Highlight Colour - Use this option to change the colour behind a text selection. The colour shown on the button is the last colour used. To select a different colour, click the arrow next to the image on the button.

Font Colour - This option changes the colour of the text. The colour shown on the button is the last colour chosen. Click the arrow next to the button image to select another colour.

The FORMAT menu, FONT option

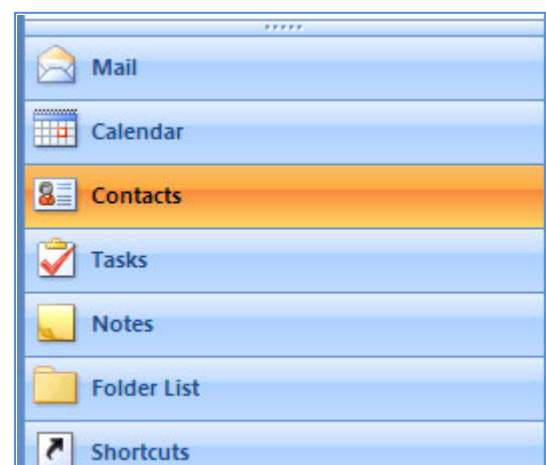
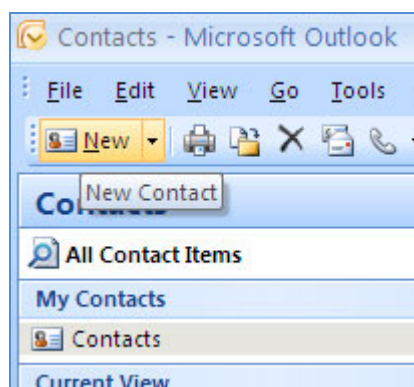
1. The FONT dialog box has further formatting options including many different styles of underlining, superscripting and subscripting.
2. Click that small diagonal arrow  in the lower-right corner of the Font group, the Dialog Box Launcher, then the Font dialog box will launch
3. Specify the changes you wish to make, then click ok to accept the changes.



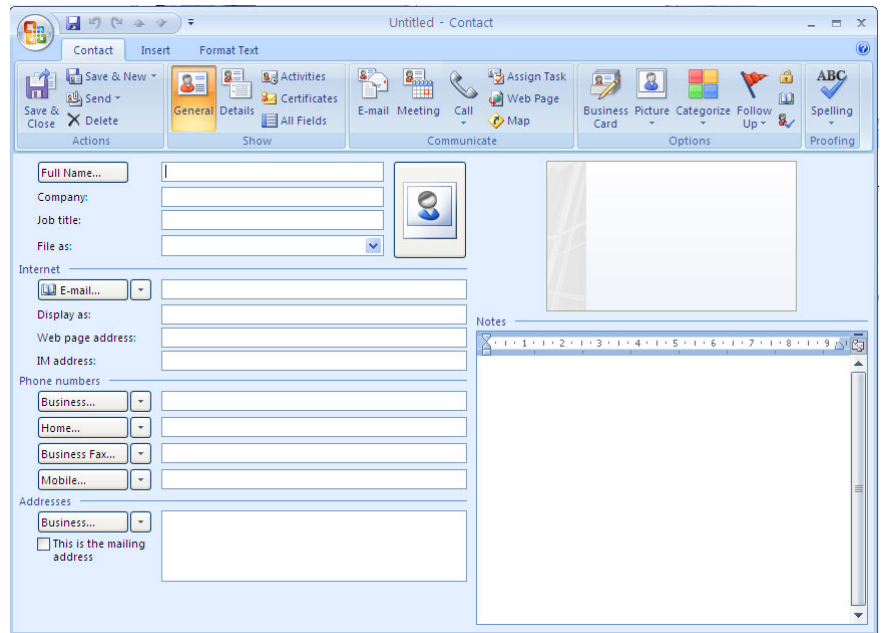
Creating new Contacts

There are a number of ways you we can create a new entry in your Contacts address book in **Outlook**.

1. Click on the **Contacts** button in the navigation panel
2. Then click new



3. The **Untitled Contact** window appears and you are able to fill in the fields that you require.



4. When you have finished entering the details, click on **Save & Close**.

OR

You can also use the **Drag and Drop** option. When you receive an email from someone who's contact details you would like to add to your contacts folder you just need to highlight their message in the **Inbox**, drag it to the **Contacts** folder in the **Folder List** and drop it.

You will then see the **Untitled Contact** dialog box like above, but all the relevant information will be entered into the appropriate fields. Just click on **Save & Close** to finish the entry. The message will still be available in the **Inbox** where it was originally located.