

## Lesson 1: Getting to know Outlook

Microsoft has launched Outlook 2007 to provide the user with a comprehensive time and information manager. The main focus of the application is to help the user better manage time and information. There are several new features that will aid you to achieve those goals set by Outlook 2007. Aid's such as **Instant Search** which will allow you to find your information, in which ever folder it may be. **Attachment Previewing** will allow you to view your attachments from within the reading pane all with just one click of the mouse.

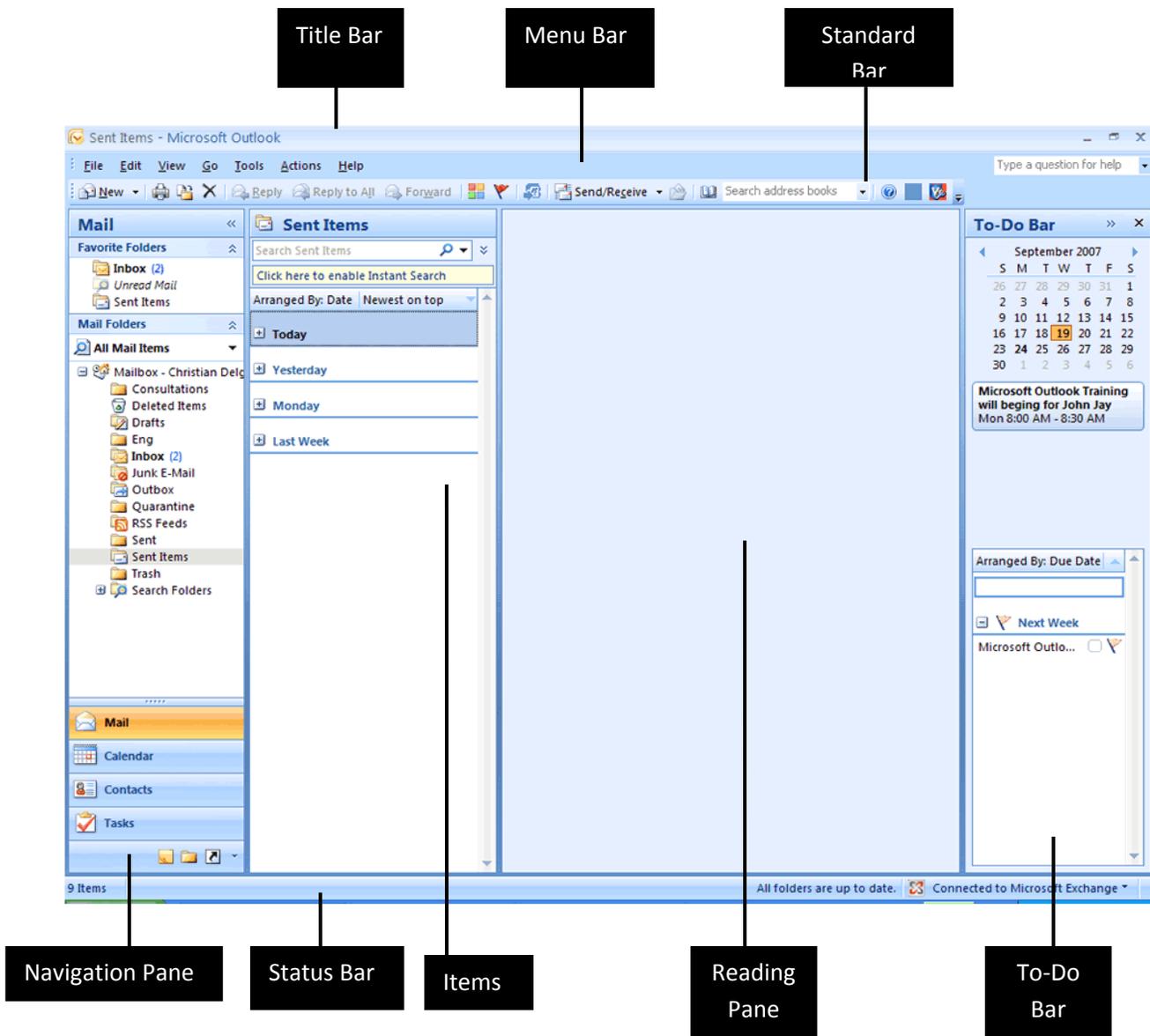
This training session will introduce the user to the new Outlook 2007 interface, and will cover some of the new and improved features that we will be using here at John Jay College in detail.

\*We recommend you use **Internet Explorer** when using your Outlook 2007 application. Using other browsers will not display the same interface as Internet Explorer.

### Using Outlook 2007 at John Jay College

- While at John Jay you will be directly connected to the exchange server housed on campus grounds. You will use the Microsoft Outlook 2007 application at your workstation. Your login information by default will be the same as when the iPlanet email service was used.
- While you work off-campus or at home, you will no longer be directly connected to the exchange server housed on campus grounds. To log in to your email service:
  1. Open a browser (*Explorer Recommended*).
  2. In the URL box type: <http://webmail.jjay.cuny.edu/owa>
  3. This URL will take you to your new John Jay email service.

## Microsoft Outlook 2007 Interface



Microsoft Outlook can be launched in two different ways. You can launch Outlook from the Start button on the windows task bar. Also by double-clicking on the icon on the desktop which is the shortcut created.

## Changing Outlooks View: Navigating within Folders

1. Click on the **Calendar** button in the navigation pane. The calendar folder will be displayed.



2. Click on the **Contacts** button in the navigation pane. Information about your Global Contact List folder will be displayed.

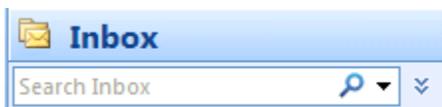


3. Click on the **Tasks** button in the navigation pane. Information about your current tasks and your to-do list folder will be displayed.



*\*Refer to figure 1.1 for location of the navigation pane.*

## Using the New Search Tool



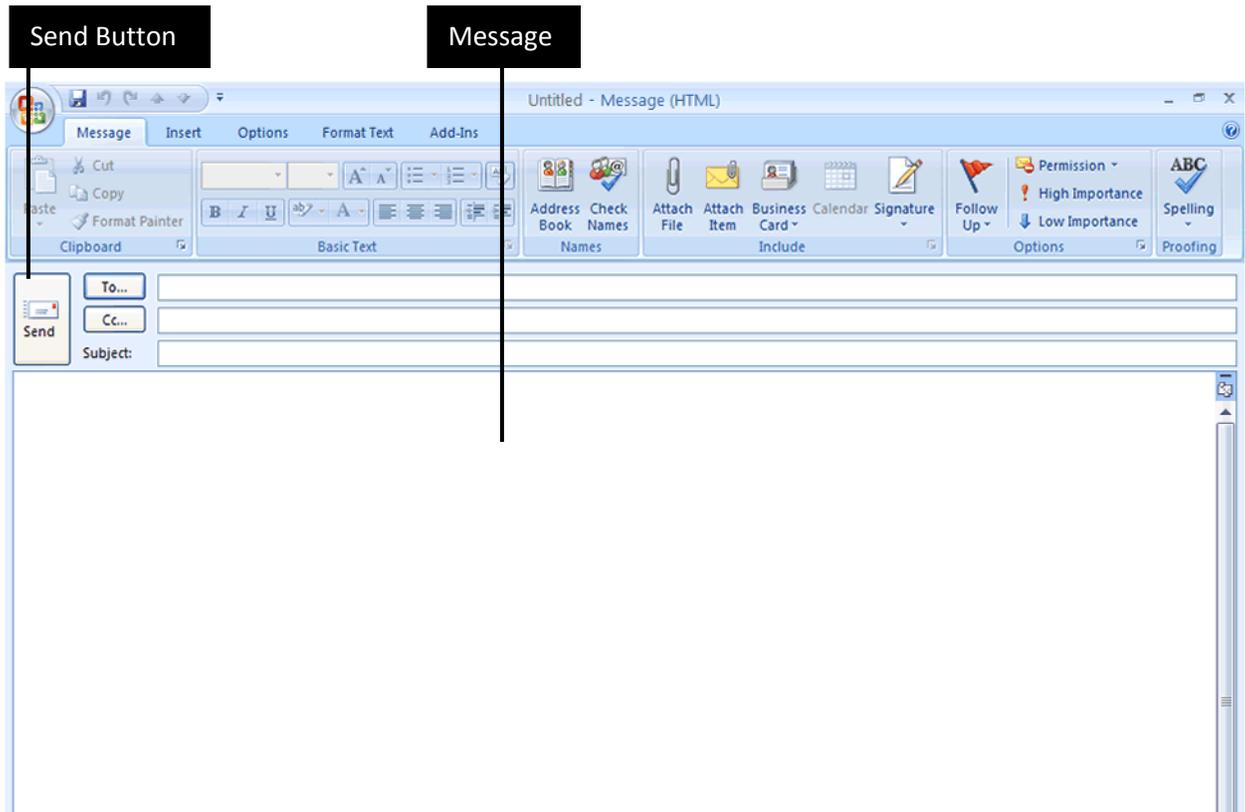
The Instant Search Tool provides you a fast way to find information within the application, no matter what folder it is stored in. The Instant Search Tool appears in the same location no matter what folder you are in.

## Lesson 2: Email Basics

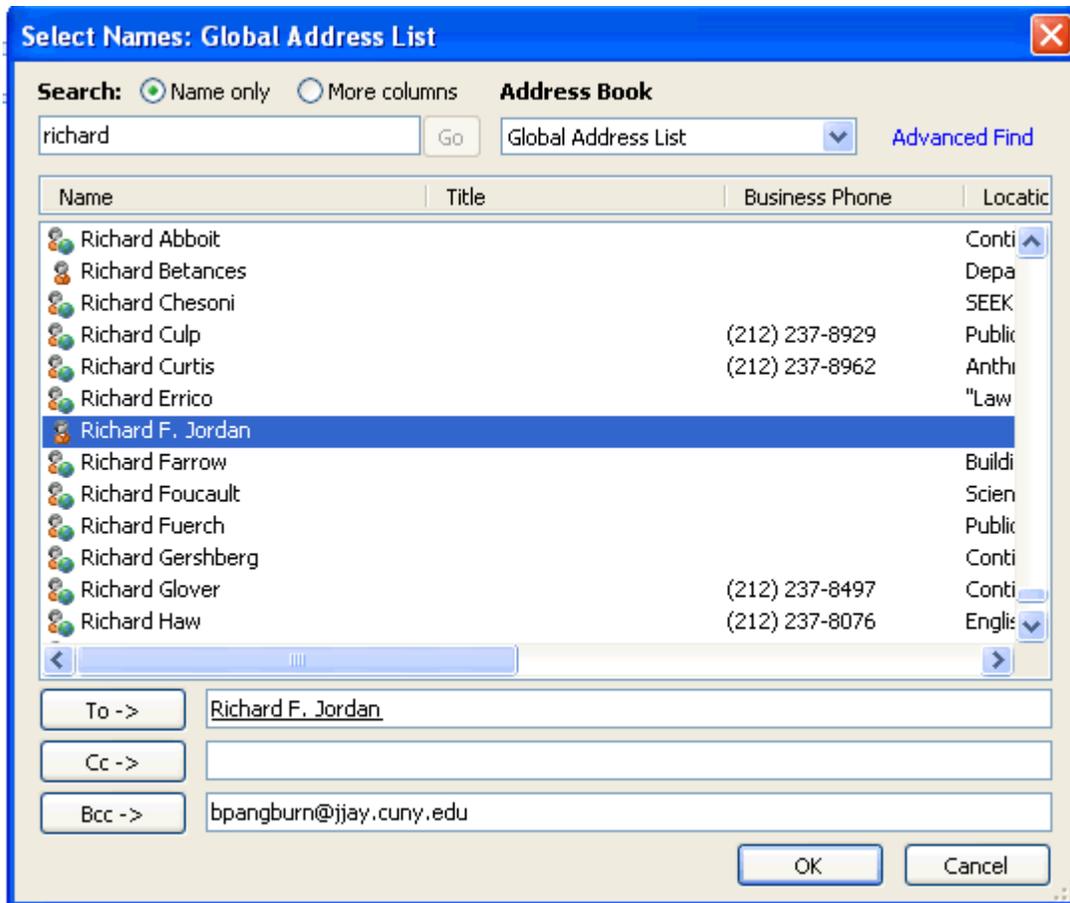
### Composing and Sending Messages

\*Your **Mail** folder should be in display before attempting this Lesson.

1. Click on the **New** button in the Standard toolbar. The Message window will open.



2. At this point you can type in a coworkers email in the space provided. You may also click on the **To...** field and select a coworker from the **Global Address List**.
3. From the **Global Address List** you may make your selection by typing the coworkers name in the **Search** field.
4. You may also scroll down the list of contacts to select to recipient(s) of the message being sent.



*\*Notice that the **Global Address List** window is the only location where the **blind carbon copy** option is available.*

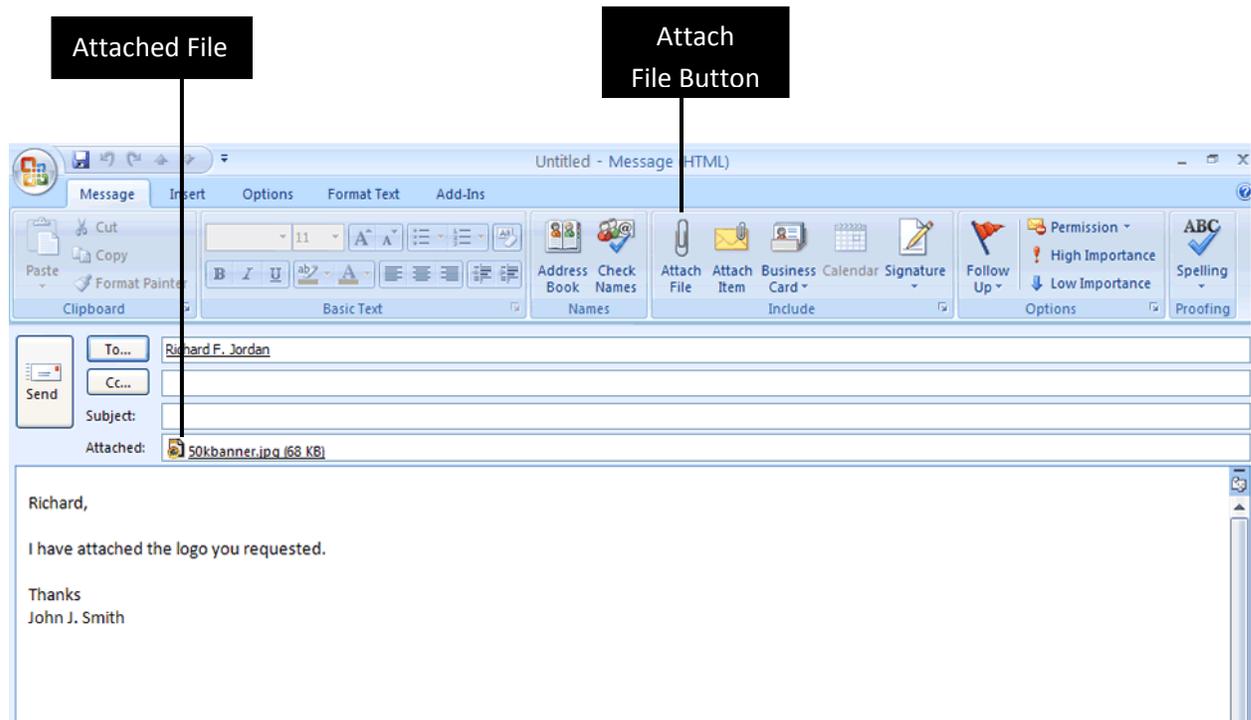
- Once all the recipients are chosen and the message is written, click on the Send button on the message window. A copy of the message sent will be stored in the sent message folder, in your folder list. *\*Refer to figure 1.1 for location of the folder list.*

## Working with Attachments

*\*Your **Mail** folder should be in display before attempting this Lesson.*

You may need to submit reports, documents, or maybe even pictures to your coworkers. You can accomplish this by attaching the file to your email and sending it.

1. Click on the **New** button in the Standard toolbar. The Message window will open.

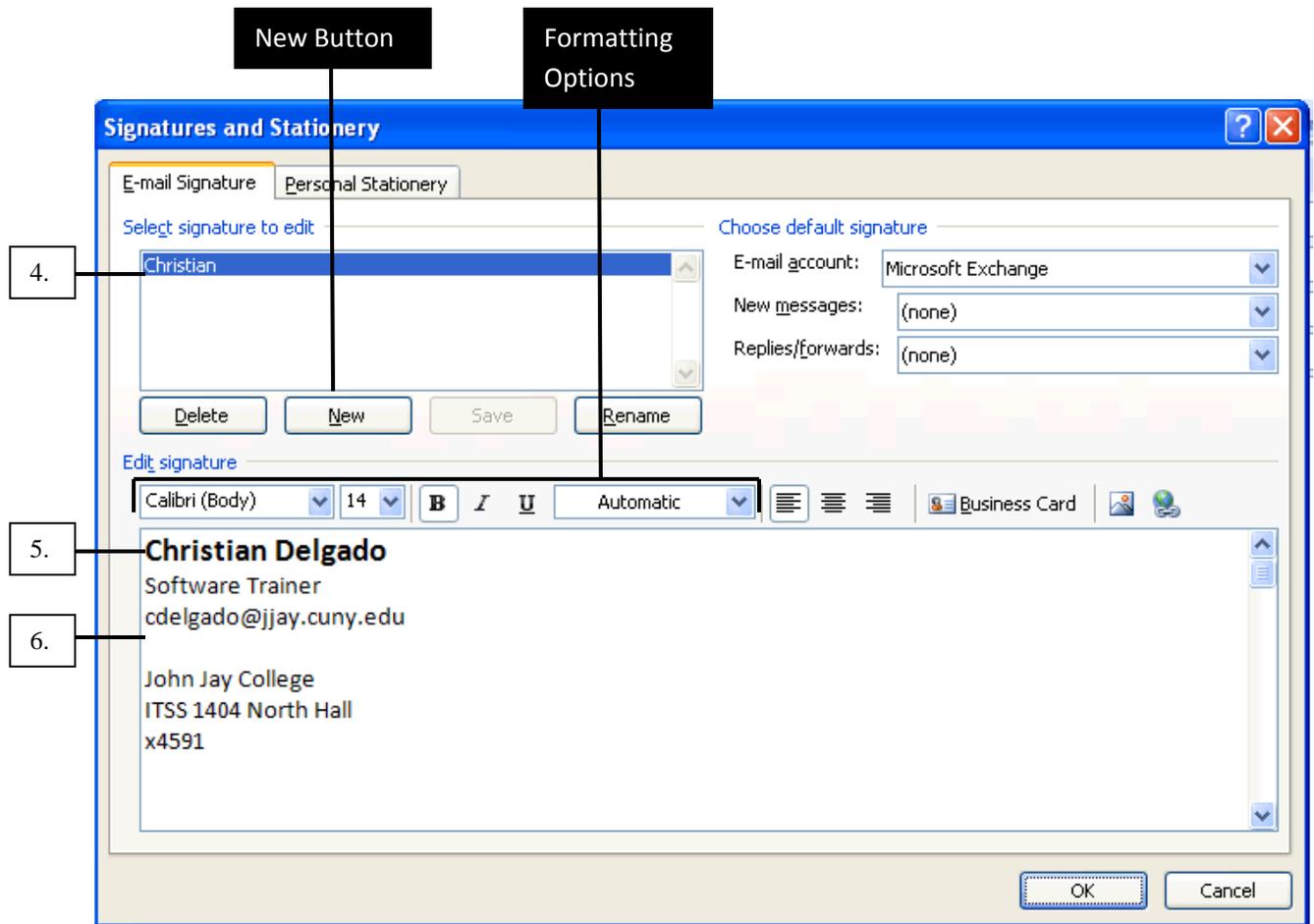


2. Click on the Attach File button. An insert file window will open. Choose the file you wish to attach.
3. Once the file has been chosen, the attached file will appear on you message window.  
*\*Refer to figure 1.4*
4. Once all the recipient(s) are chosen the message is written, and the file is attached click on the Send button on the message window. The message will be distributed to the recipient(s)  
*\*Note: More than one attachment can be sent in one email message.*

## Adding a Signature to a Message

A signature can be text or image that will be automatically placed at the end of your outgoing message.

1. Click on the **New** button on the standard toolbar. The Message window will open.
2. In the include group on the Ribbon, click **Signature** and select **Signatures**.



3. Click the **New** button on the **Signature** and **Stationery** window.



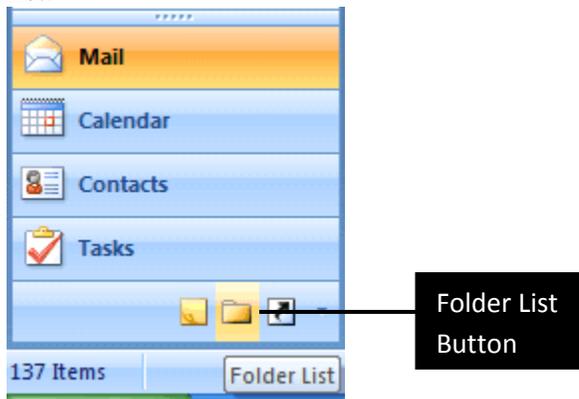
4. Type in a name for your personal Signature. Click on OK.
5. Click inside the empty Edit signature box.
6. Create a signature for your messages.

## Lesson 3: WORKING WITH FOLDERS

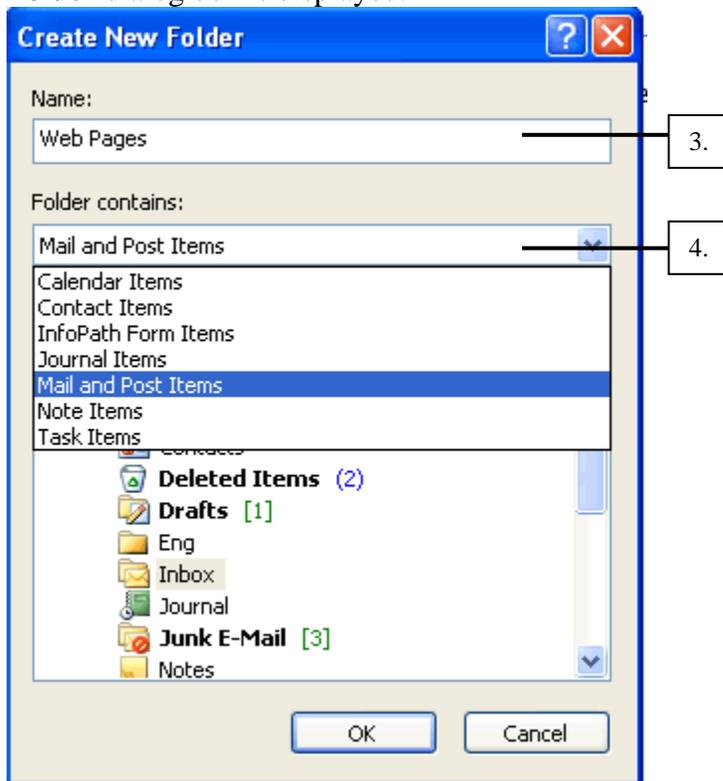
Folders are created so that messages received can be properly placed in the appropriate folder after they have been opened. The message may contain a task, you perform the task, and then place the message in a specific folder for that type of message.

### Creating a New Folder

1. Click the **Folder List** button in the bottom of the **Navigation** pane to display the folder list.



2. Click the arrow next to New in the Standard toolbar. Click Folder. The **Create New Folder** dialog box is displayed.



3. In the **Name** field, name the folder being created.
4. Enter a brief description of what the folder will contain.
5. Click on the **OK** button to close the dialog box. The folder is now created.

## Lesson 4: Contacts in Outlook

The contact folder allows you to organize and also maintain information about the people and businesses you communicate with. A contact is a collection of information about a person or company. This information is kept in Outlook and acts like an electronic organizer.

### Creating a Contact

1. Click **New** on the **Standard** toolbar. The **Contact** window is displayed.

2. Information can be stored in this window for a new contact.
3. Fill in all the fields that you will need to store for the contact.
4. Once all the fields have been filled, click on **Save and Close** on the **Actions** group on the Ribbon.
5. A business card will be automatically created from the information entered, and the contact will be placed in your **Global Address List**.

### Deleting a Contact

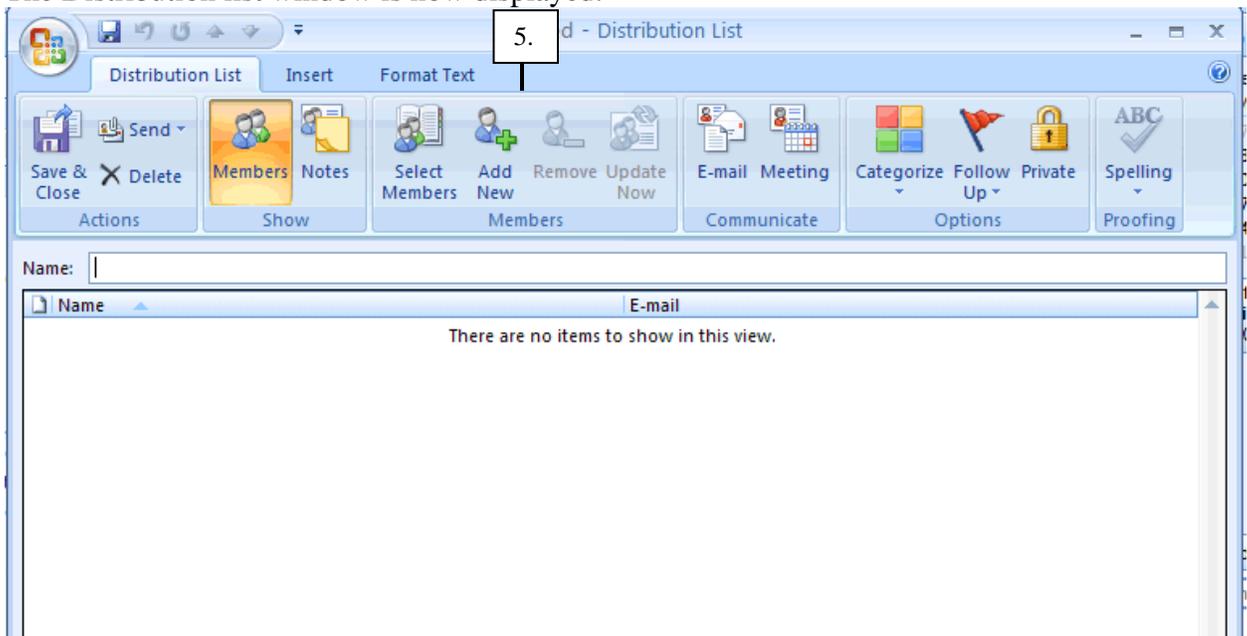
1. Click on the **Contact** button on the **Navigation** pane. The contact folder will open.
2. Click on the **Contact** to be deleted.

3. Click on the **Delete** button on the **Standard** toolbar.
4. The contact information is sent to the deleted folder in the folder list.

## Creating a Distribution List

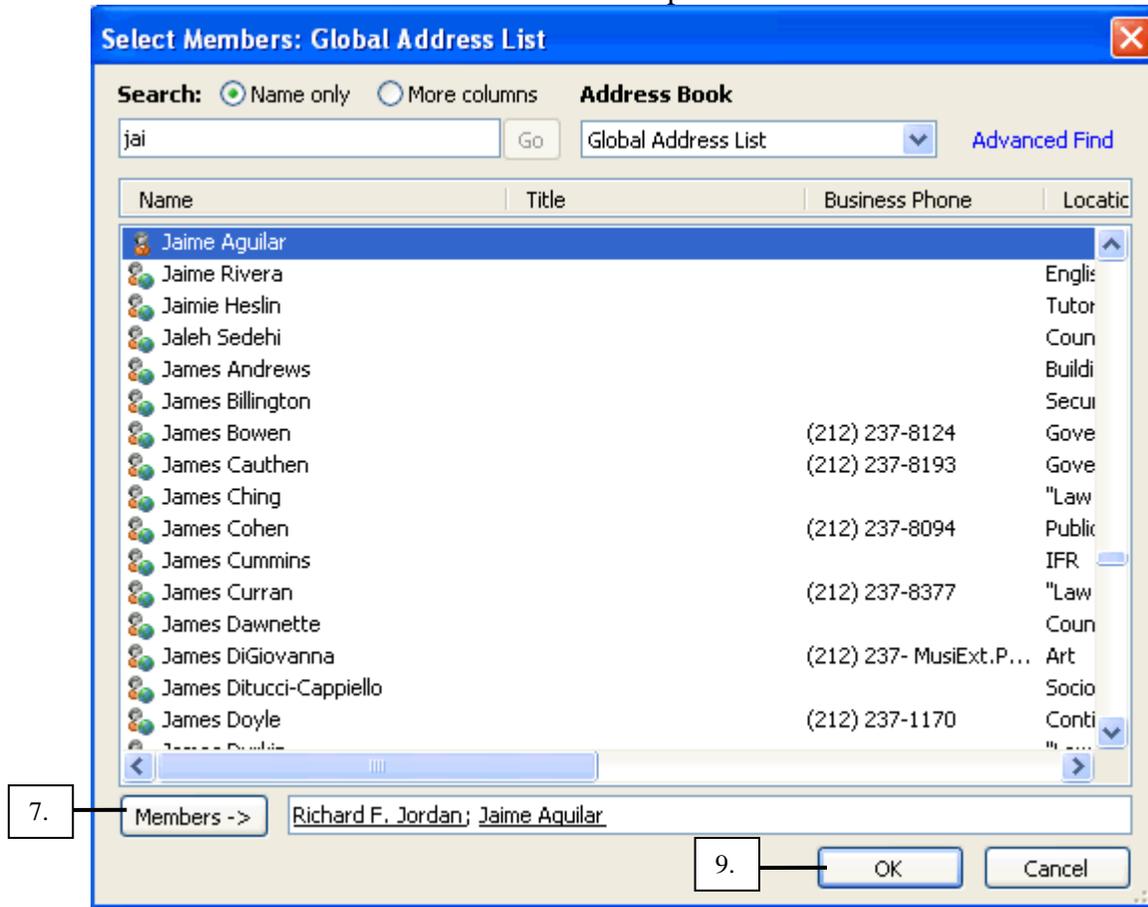
A distribution list is a group of individual contacts saved together as one. Distribution lists can be created when sending one message to multiple recipients at once.

1. Click on the **Contact** folder in the Navigation pane. The contact folder will open.
2. Click on the drop-down arrow on the **New** button on the **Standard** toolbar.
3. Choose the **Distribution List** option from the drop-down menu.
4. The Distribution list window is now displayed.



5. In the **Members** group on the Ribbon, click on **Select Members** button.

6. The **Select Members: Contacts** window is open.



7. Add the first contact and click on the **Members** button. The contact will be added to the **Members** field.
8. Click on the second contact to add on the distribution list and click on **Member** once again. This process should continue until all contacts are selected and added to the list.
9. Once all the contacts have been added click on the **OK** button on the **Distribution List** window.
10. Click on the **Name** field in the **Contact** window. Choose a name that will identify the group and will be easy to remember.
11. Click the **Save and Close** button on the **Ribbon**. The distribution list is now created and saved.
12. To send a message to the group, click on the group business card.
13. Go to the **New** drop-down menu and choose **Mail Message**, and compose the message that will be sent to the recipients of the group.

## Modifying a Distribution List

1. Click on the **Contact** button on the Navigation Pane. The contact window will open.
2. Select the name of any distribution list by double-clicking it.
3. Click on any contact in the **Members** field and click on **remove**.

4. The contact will be removed from the Distribution list.

## Lesson 5: Electronic Business Cards

A new feature to Outlook 2007, electronic Business cards are the digital version of the traditional paper business card. They can be sent as attachments, and used as signatures. Electronic Business cards are created automatically when creating contacts.

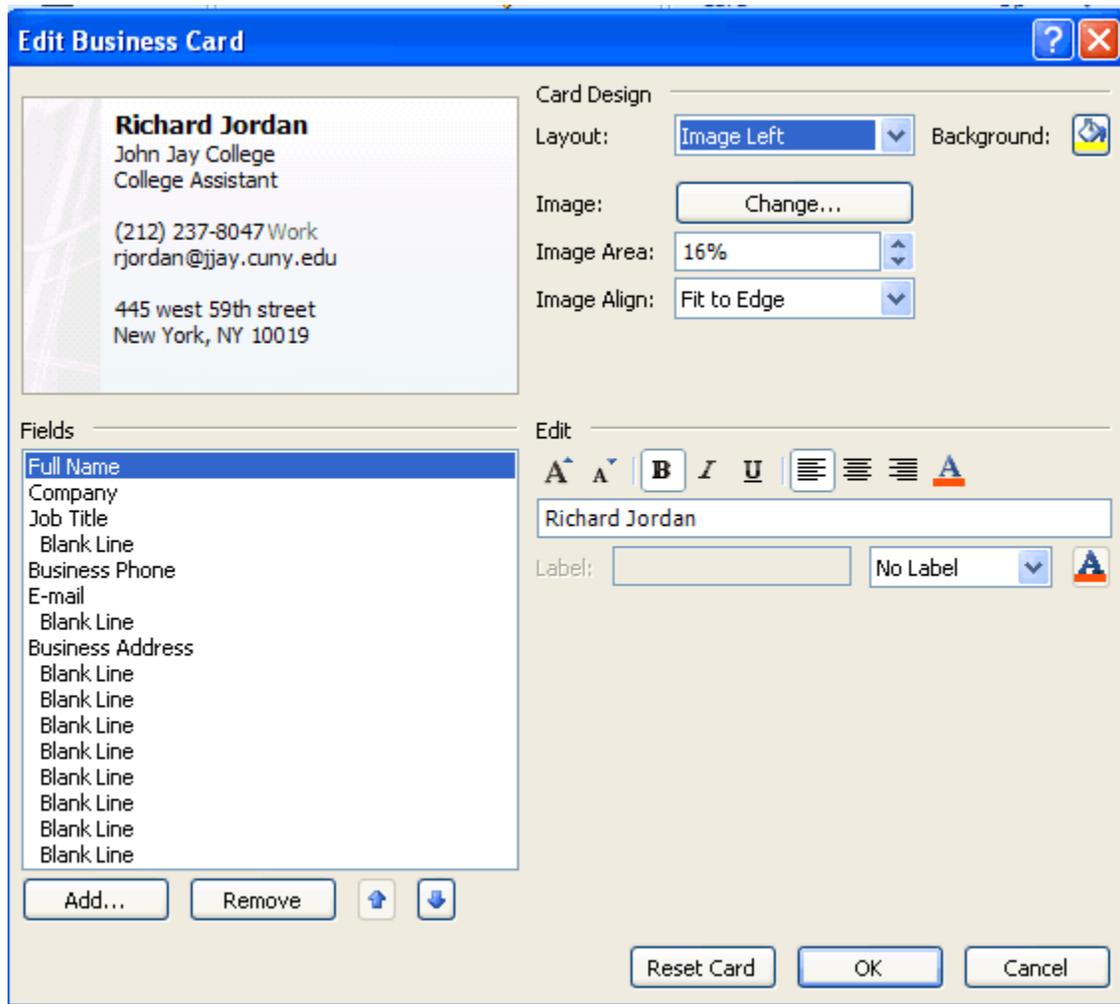
### Editing Electronic Business Cards

1. Click on the **Contact** button on the Navigation Pane. The contact window will open.
2. Click on **Business Card** in the **Options** group on the **Ribbon**.



2.

3. The Edit Business Card window will open.

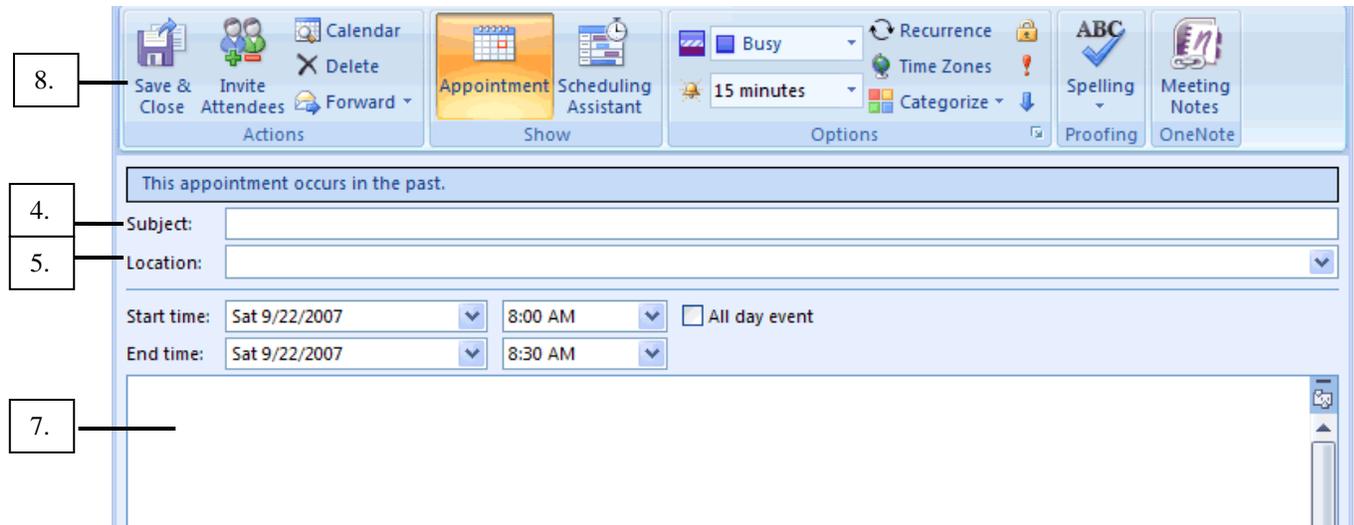


4. All editing from changing image location on the card, to changing the font can be done from this window.
5. Once all changes have been done click on **OK** to save the changes.
6. The **Reset Card** button can be click to go back to default settings.
7. Click on **Save and Close** on the **Contact** window to accept all changes.

## Lesson 6: Calendar in Outlook

### Create a One-Time Appointment

1. Click on the **Calendar** Button on the Navigation pane. The calendar folder will open.
2. Click on a day in the calendar.
3. On the **Standard** toolbar click on the **New** button. The Appointment window is displayed.

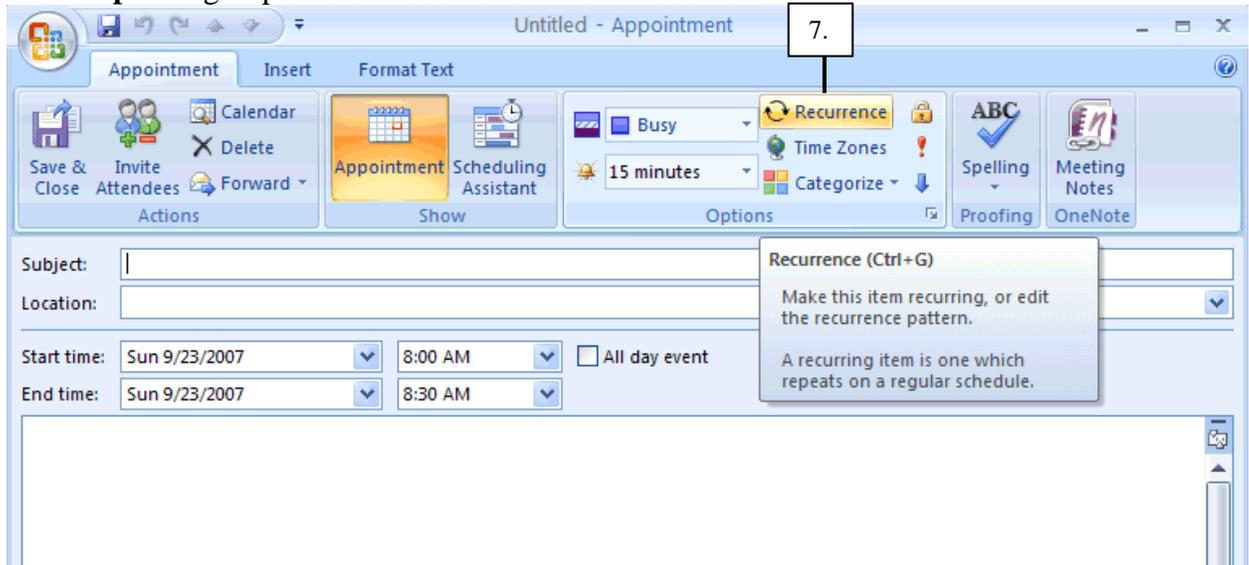


4. Add a subject in the **Subject** field.
5. Type in or choose a location in the **Location** field.
6. In the start time field either type or select a preset time. Choose an ending time for the appointment.
7. Type in a small reminder of what the appointment will be about in the **Memo** area.
8. Once all the necessary appointment information is entered click on **Save and Close** button in the **Actions** group.

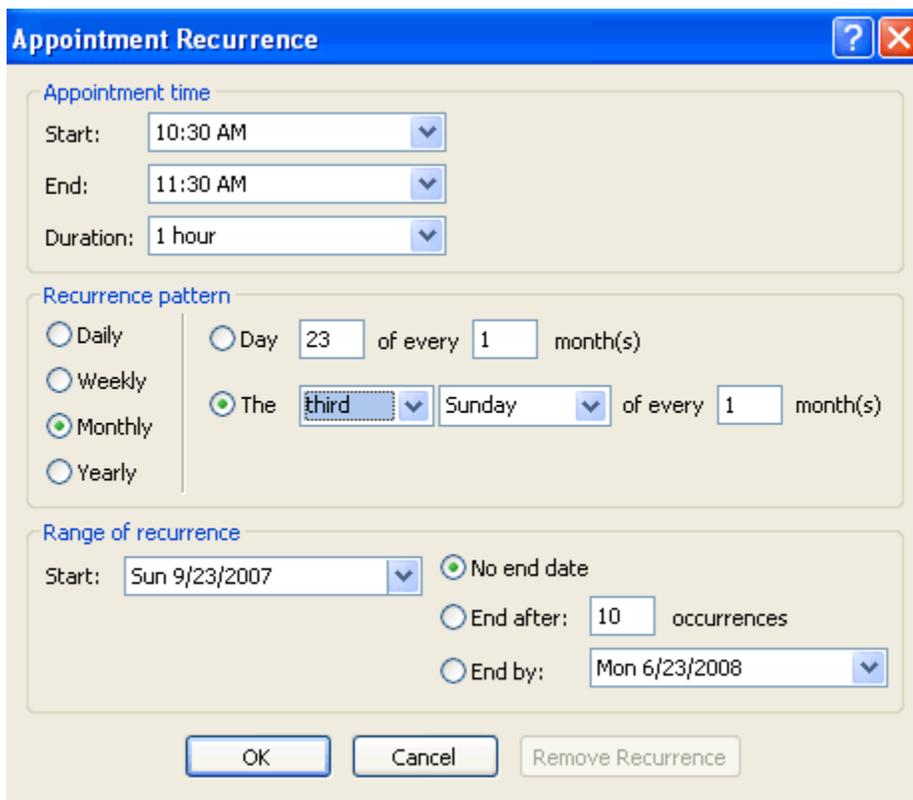
### Scheduling a Recurring Appointment

1. In the **Calendar** folder click on the **Month** button.
2. Click on a day in the monthly calendar view.
3. Click on **New** in the **Standard** toolbar. The appointment window will open. The selected day will also appear on the appointment window.
4. Type in a subject in the **Subject** field.
5. Type in a location in the **Location** field.
6. Type in a short reminder in the **Memo** area.

7. In the **Options** group on the Ribbon click on the **Recurrence** button.



8. The **Appointment Recurrence** window will open.



9. Once the selected recurrence has been assigned, click on the **OK** button.
10. Click on **Save and Close** on the **Appointment** window. You will be reminded of the recurring appointment by Outlook with pop-up windows when you start the application.

## Creating an Appointment from a Message

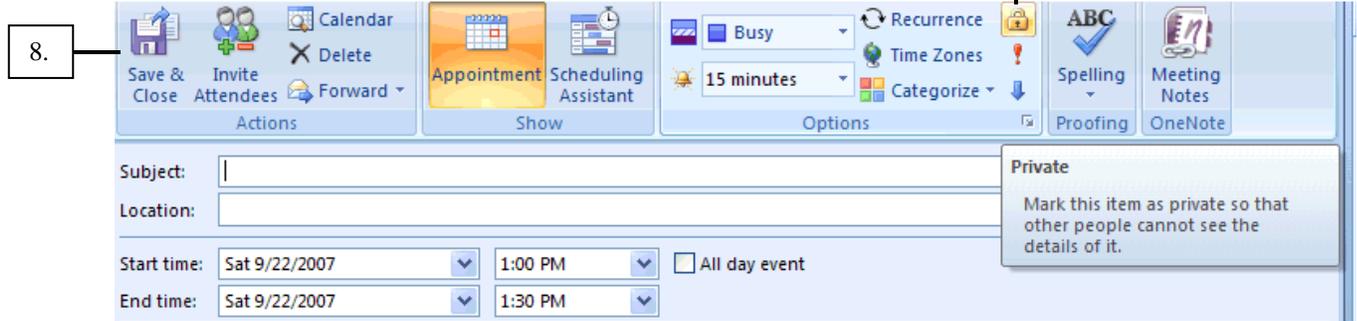
1. Click on the **Mail** button in the Navigation Pane. The mail folder will open.
2. Click on the **New** button in the standard toolbar. The Message window will open.
3. In the **To** field, type in your email address.
4. In the **Subject** field type in  
Mr. Bill Pangburn will be visiting our department on  
Wednesday. A company meeting will be held at  
3:00pm to 4:00pm. Attendance is mandatory.
5. Send the message. The message will be received in your inbox as you are the recipient.
6. Open the message by double clicking on it.
7. Click on the **Move to Folder** in the **actions** group on the Ribbon. On the drop-down list click on **Other Folder**. The **Move to Item** window is displayed.
8. In the **Move to Item** window click on **Calendar** and then click on **OK**.
9. An appointment window will then open.
10. In the appointment window type in **Company Meeting** in the **Location** field.
11. Type in Wednesday in the **Start** time field instead of a date.
12. In the **End** time type in or select 4:00pm.
13. Click on **Save and Close** button in the **Actions** group on the Ribbon.
14. When choosing the Calendar folder, you will now notice that an appointment has been created from the message and is displayed on the calendar.

## Making Appointments Private

Marking an appointment as private will protect your information from a casual person passing by your workstation. A coworker or anyone who has Read privileges to your calendar can view your private appointment.

1. Click on the **Calendar** button on the Navigation pane. The calendar folder will open.
2. Click on **New** button on the Standard toolbar.
3. A new appointment window will open.
4. Type a subject in the **Subject** field.
5. Type in a location in the **Location** field.
6. Select a start and end time for the appointment.

7. In the **Option** group on the ribbon, click on the **Private** button.

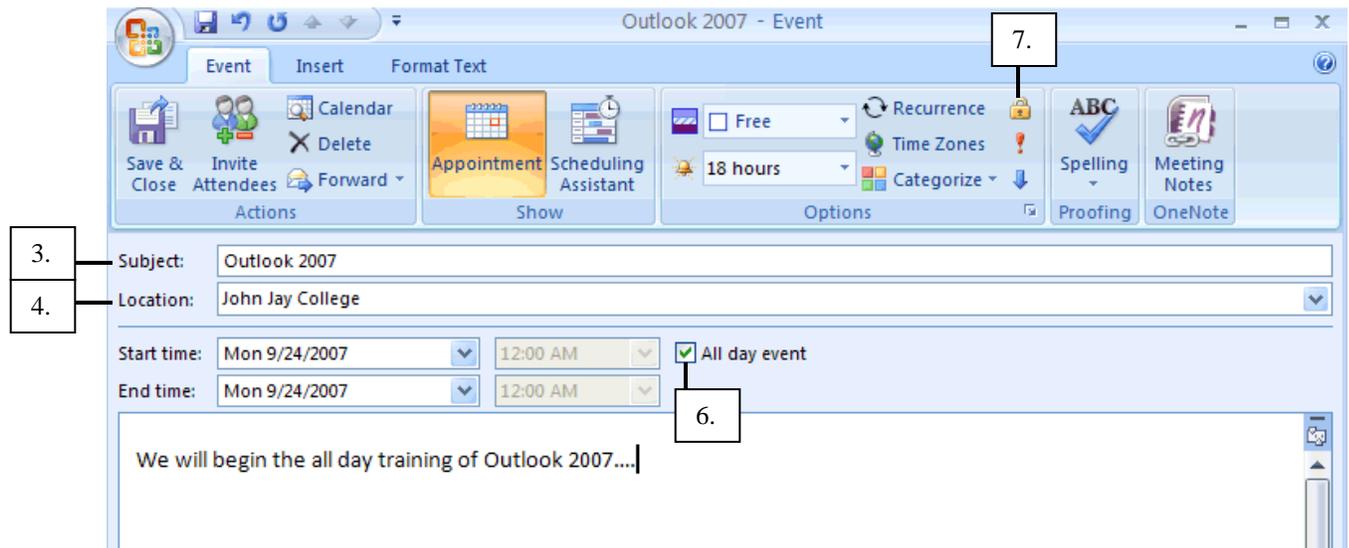


8. Click on the **Save and Close** button in the **Actions** group on the Ribbon.

## Creating an Event

An event is an activity that can last for more than one day. Events in Outlook are displayed as banners at the top of the day. An event can be a personal anniversary or conferences.

1. Click on the **Calendar** button on the Navigation pane. The calendar folder will open.
2. Click on the **New** button on the **Standard toolbar**. The appointment window will open.
3. Type a subject in the **Subject** field.
4. Type a location or chose a location in the Location field.
5. In the start time, type the date of the conference.
6. Check off the **All day Event**. Notice the time fields are dimmed.



7. Click on the **Private** button in the **Options** group on the Ribbon.

8. Click on the Recurrence button. The **Appointment Recurrence** window will open.

The screenshot shows the 'Appointment Recurrence' dialog box. It is divided into three main sections: 'Appointment time', 'Recurrence pattern', and 'Range of recurrence'.  
- 'Appointment time': Start is 9:00 AM, End is 5:00 PM, and Duration is 8 hours.  
- 'Recurrence pattern': The 'Yearly' radio button is selected. The pattern is set to 'Every December 14'.  
- 'Range of recurrence': 'No end date' is selected. The start date is 'Mon 9/24/2007'.  
Buttons at the bottom include 'OK', 'Cancel', and 'Remove Recurrence'.

9.

9. In the **Appointment Recurrence** window choose **yearly**.

10. A reminder can be set by choosing **Reminder** from the drop-down list on the **Actions** group of the Ribbon.

The screenshot shows the Outlook 2007 ribbon for a 'Recurring Event'. The 'Actions' group is highlighted, and the 'Reminder' dropdown menu is open, showing the option 'Choose when to be reminded of this item.'.  
- 'Subject': Outlook 2007  
- 'Location': John Jay College  
- 'Recurrence': Occurs every September 24 effective 9/24/2007 from 9:00 AM to 5:00 PM.  
- 'Text': We will begin the all day training of Outlook 2007....

11.

11. Click on the **Save and Close** button on the **Actions** group, and the appointment will be added to your calendar.

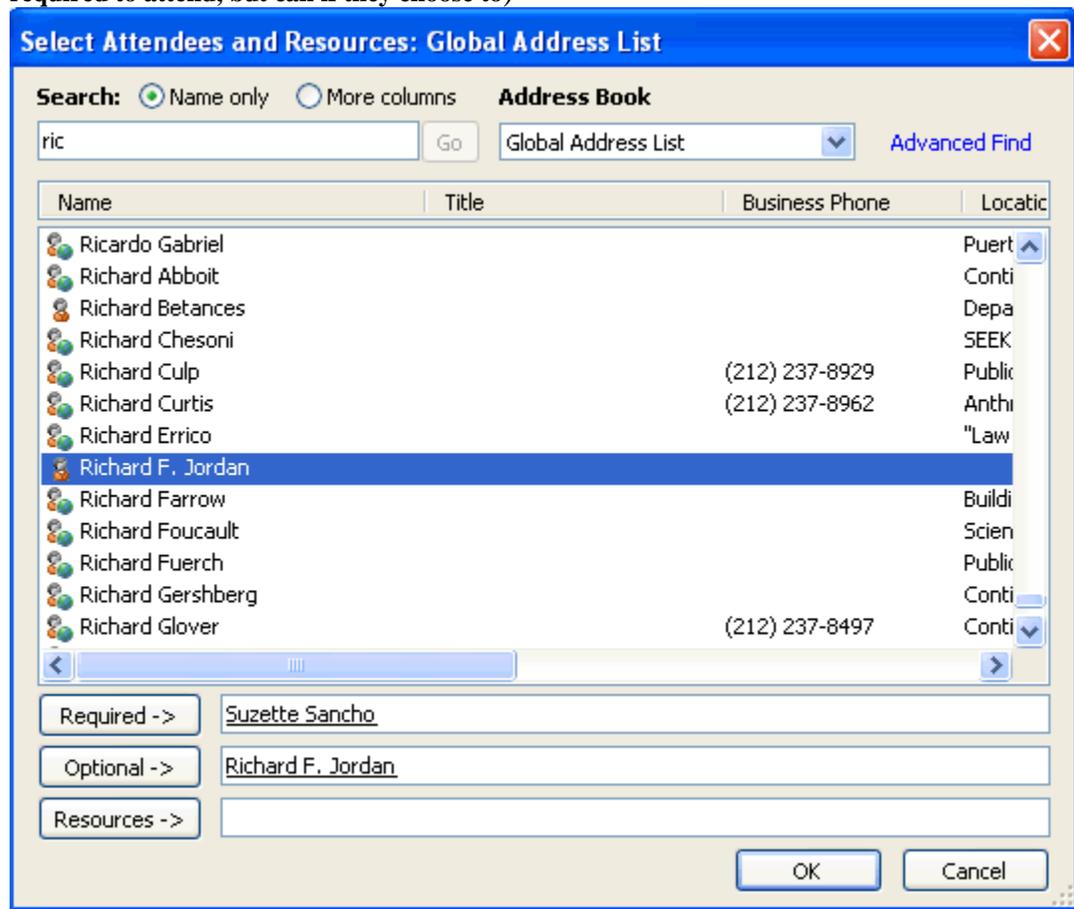
## Lesson 7: Meetings in Outlook

A meeting is a scheduled appointment with either coworkers, personal acquaintances that require you to send invitations.

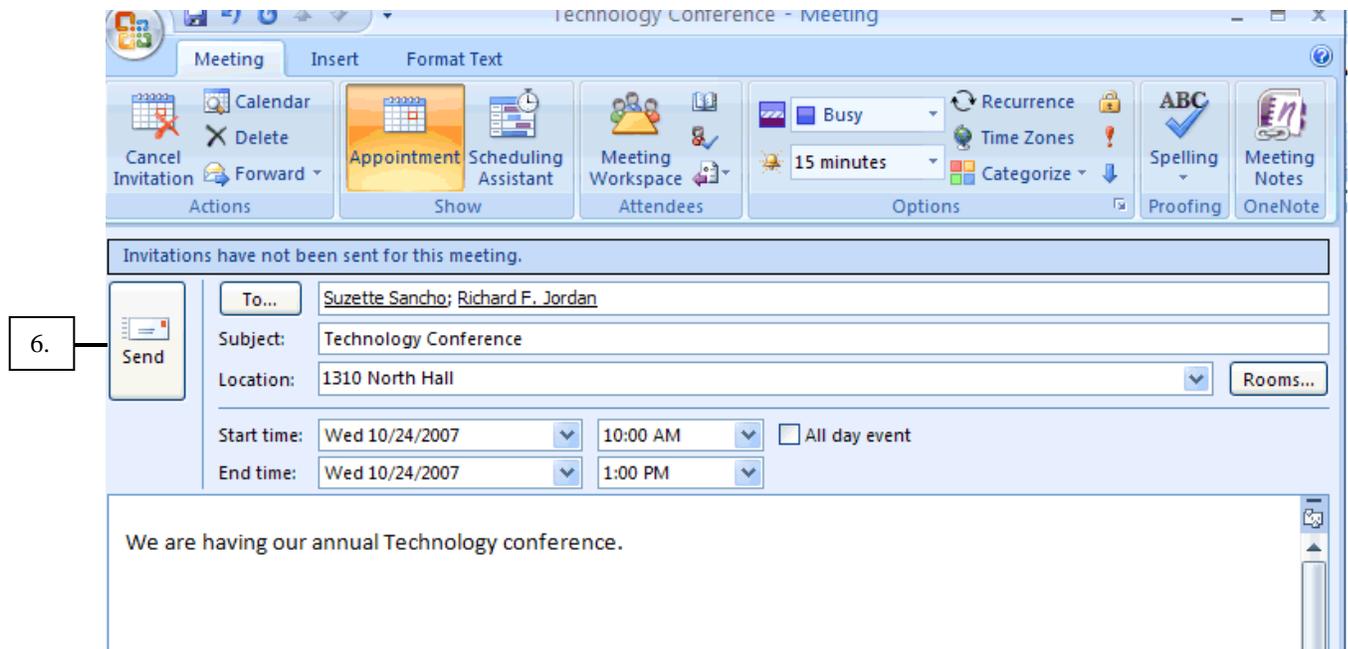
### Creating a One-Time Meeting – Inviting attendees to Meetings

1. Click on the **Calendar** button in the **Navigation** pane. Click on month to display the monthly view.
2. Choose a day on the calendar to begin to schedule the meeting.
3. Click on the drop-down arrow on the **New** button. Click on **Meeting Request** from the drop-down menu.
4. Click on the **To** button to select the attendees.
5. The **Global Address List** window will open. Attendees may be sent a request as required to attend, or as an optional choice to attend.

(A mandatory attendee is a person who must attend the meeting, while an optional attendee is not required to attend, but can if they choose to)



6. Once all the necessary fields in the meeting request have been filled, click on the **Send** button, and the recipients will be sent an email with the meeting request.



## Responding to a Meeting Request

When a user is emailed with a meeting request, you will have five options at the top of the message to reply. You can accept, accept tentatively, decline, propose a new time, or view your calendar.

1. Open up the message containing the Meeting request.
2. Click on the button that will best suit your response. You may also add a comment.
3. Click the **Send the Response Now** option. Click on Ok.
4. If you will accept the request, simply double click on the **Accept** option and the reply will be sent automatically.

## Modifying a Meeting Request – Changing the Meeting Time

The most common changes to a meeting will be changing the time or location.

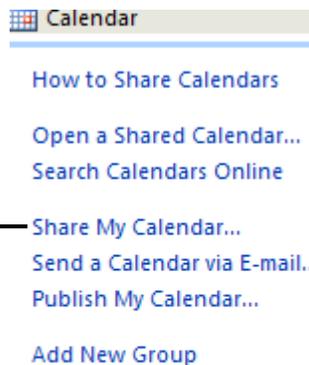
1. Click on the **Calendar** button on the **Navigation** pane. Click on month to display the monthly view.
2. Double click on the meeting to be modified. The meeting window will open.
3. Change the time of the meeting by setting a new start and end time, or change the location, in the **Location** field.
4. Once all changes have been made, click on **Send Update**.
5. The recipients will now receive a new email message with the new time for the meeting.

## Lesson 8: Calendar Management

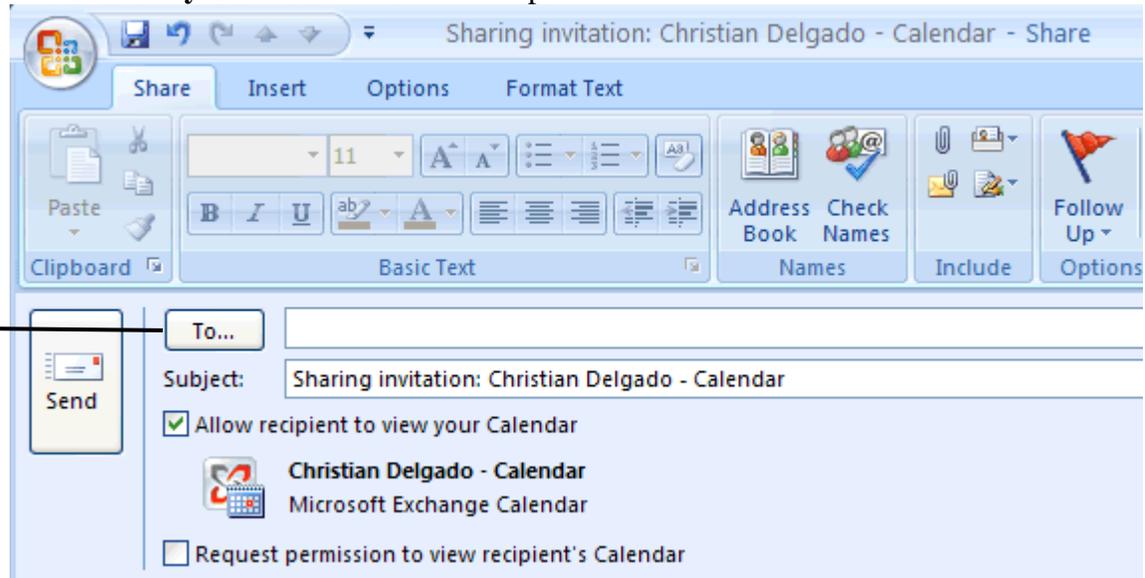
### Sharing your Calendar

When you share your calendar with coworkers, you allow others to see what times and days are best to meet or not. At John Jay we will be sharing our calendars using the exchange server housed on campus grounds.

1. Click on the **Calendar** button on the **Navigation** pane. The calendar folder will open.
2. Click on the **Share My Calendar** link also located on the **Navigation** pane.

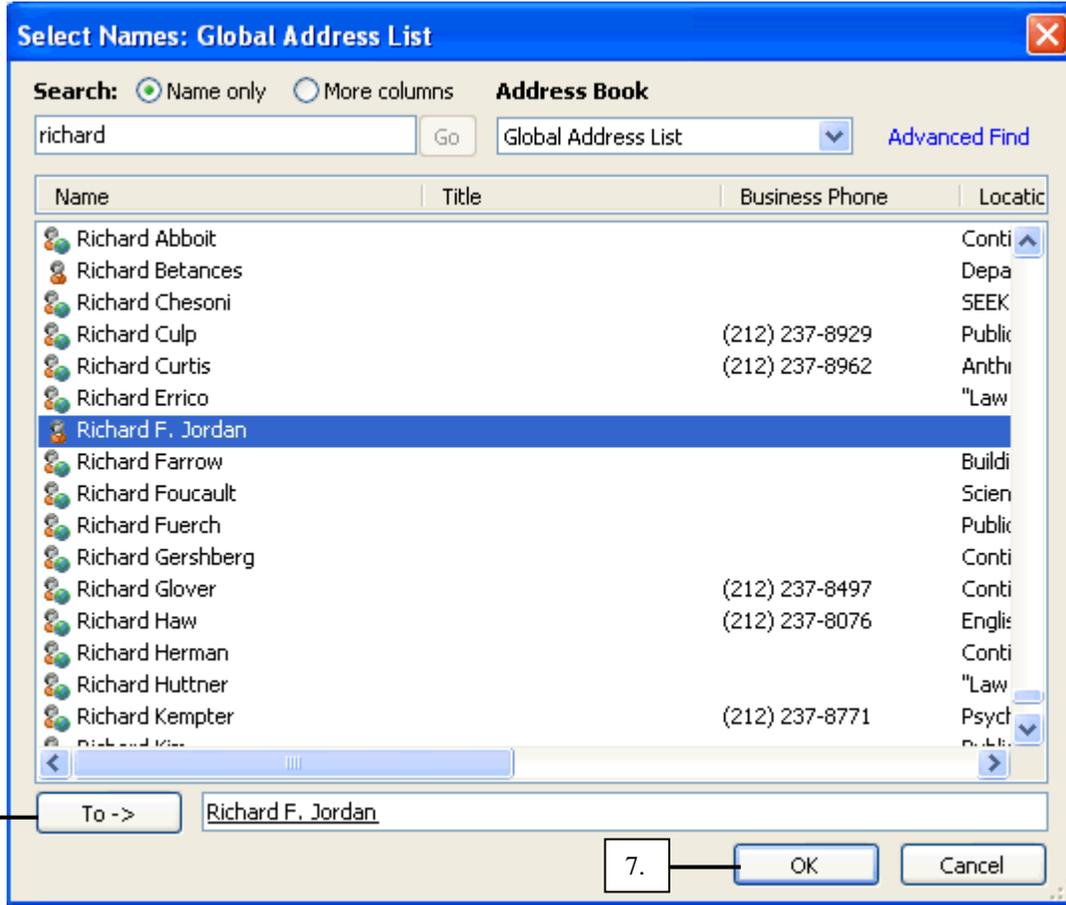


3. The **Share My Calendar** window will open.



4. Click on the **To** button to add the recipient(s) whom you will share your calendar with.

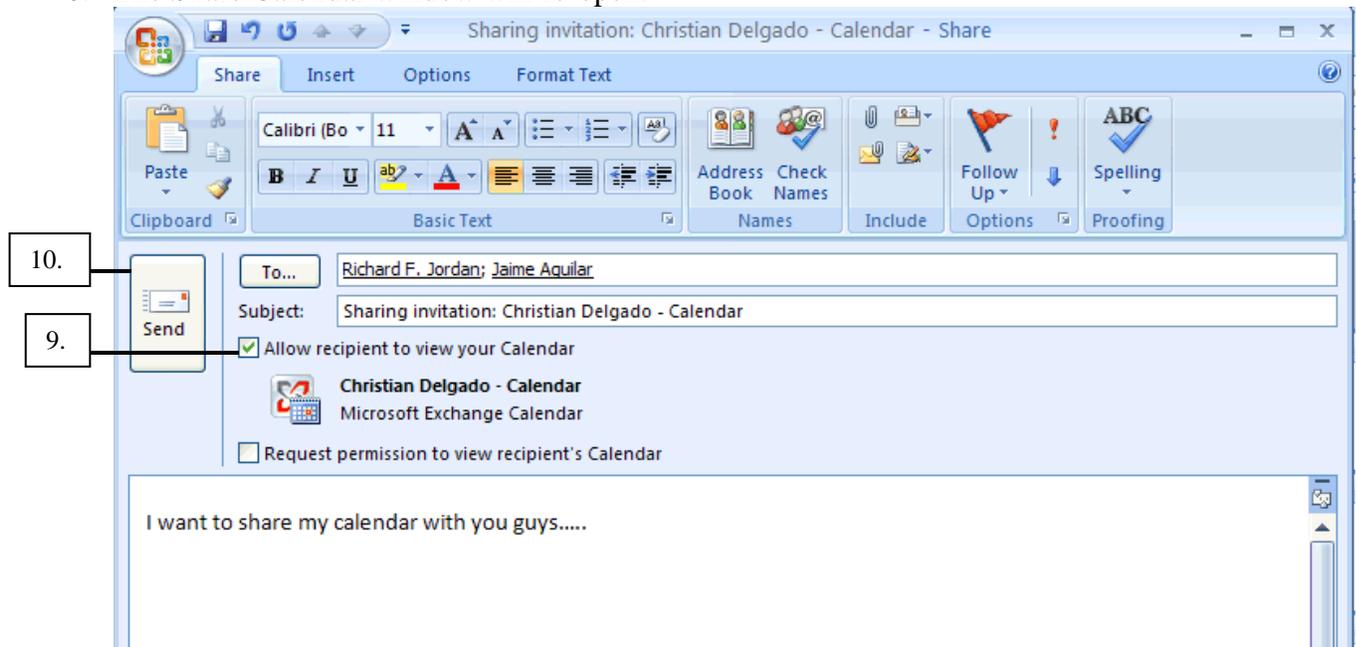
5. The **Global Address List** window will open.



6. Add all the contacts with whom you wish to share your calendar with in the **To** field on the **Global Address List** window.

7. Once the recipient(s) has been added, click on **OK**.

8. The Share Calendar window will re-open.

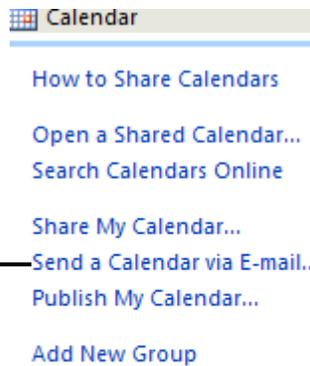


9. The Allow recipients to view your Calendar box will be automatically check off. If it is not, please do so.
10. Once all fields, and Memo area have been filled Click on the **Send** button, and then **OK** to confirm the information.

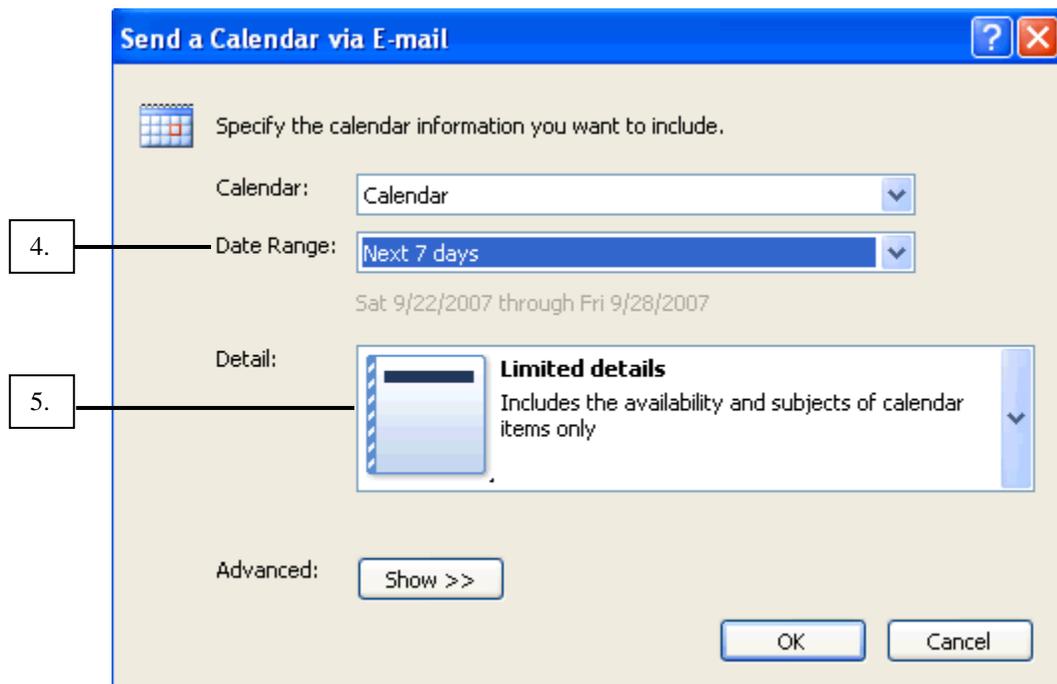
## Send Calendar information via Email

Another way of allowing others to see your calendar is by emailing the calendar information. Your calendar will be sent to the recipient as a snapshot. A snapshot is a picture of the calendar of that specific instant. Any future changes done to the calendar will not be seen by the recipient(s).

1. Click on the **Calendar** button in the **Navigation** pane. The calendar window will open.
2. Click on the **Send Calendar via Email** link in the navigation pane.



3. The **Send a Calendar via Email** window will open.



4. Specify the range of days to be sent for viewing in the **Date Range** field.
5. Choose **Limited Details** so the recipient(s) can only see the availability and subjects of the items only. Click on **OK**.
6. In the message window select the recipient(s) whom you want to send a snapshot of your calendar to. Click **OK** once all the necessary fields have been filled.