

Microsoft Outlook 2007™

A Beginners Guide

Contents

Introduction	1
Connecting to the ITS Managed PC Facilities Terminal Server	1
Opening Outlook.....	2
Using the Calendar.....	2
Creating an Appointment.....	3
A Recurring Appointment/Event.....	5
Changing the Calendar Layout, View and Other Defaults	6
Working with the Date Navigator	6
Changing the Calendar View	7
Other Calendar Defaults	7
Organising a Meeting	9
Using the Email System	13
Adding a Signature	13
Tips on Using your Mailbox	16
The Reading Pane and AutoPreview	16
Arrange by Conversation	17
Colour Coding Messages.....	17
Favourite Folders.....	18
For Follow Up Folder.....	19
Blocked Attachments	20
Away from the Office	21
Using Contacts.....	21
Adding a New Contact	22
Current View of Contacts.....	22
Adding an Address from an Email.....	23
Sending an Email to a Contact	23
Setting up a Task.....	23
Further Information	24
Logging Out.....	24

These notes are specifically for the CSTD Training Course, Introduction to Using Outlook, and are best used in conjunction with this course. Some of the information can be used and applied, by those who are not on the course, to their PCs on campus that also use Microsoft Outlook.

Note: This document assumes that you are familiar with using a windowing system (with its icons, menus and a mouse) and know the procedures of pointing, clicking, double clicking, dragging and multi-tasking.

Introduction

It is assumed that the course attendee knows how to login to a PC that is in a University PC Facility managed by IT Services.

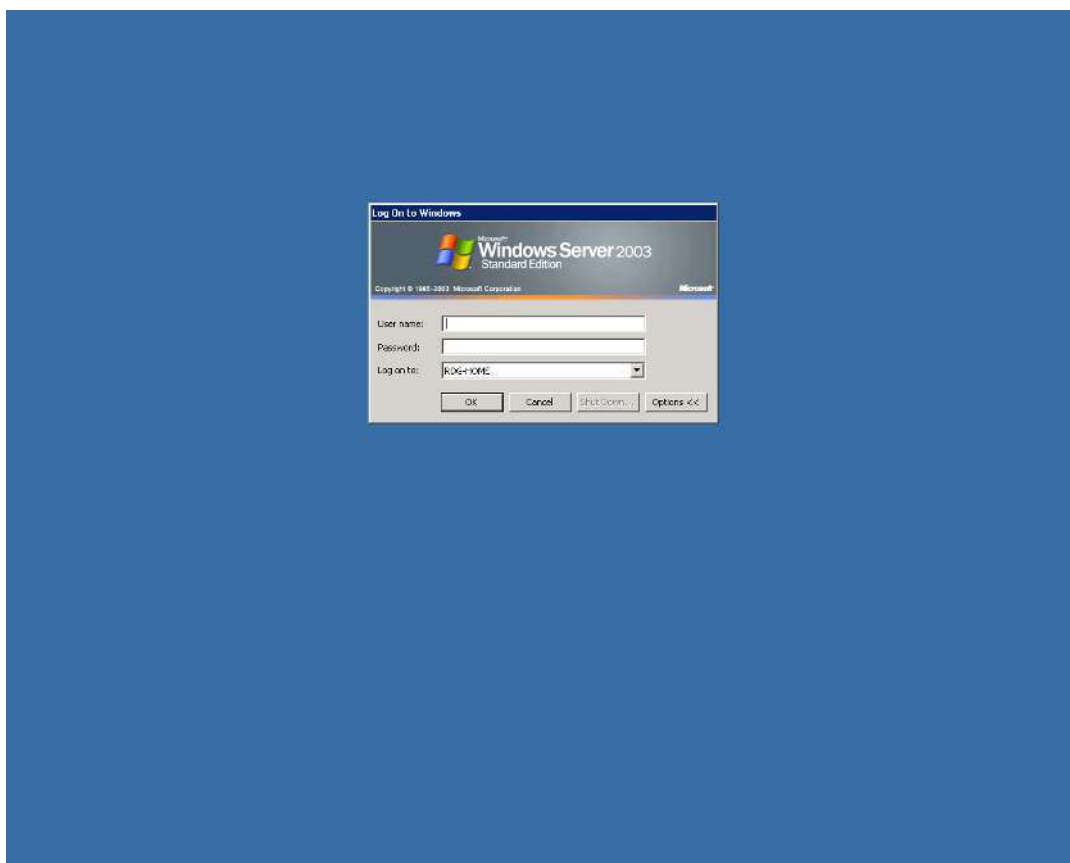
Please make sure that you login to the PC with your username and password.

Connecting to the ITS Managed PC Facilities Terminal Server

To have access to Outlook on Exchange, you are going to connect to the ITS Managed PC Facilities Terminal Server. To do this:

1. Click on **[Start]** in the bottom left-hand corner of the screen followed by **All Programs** and **Connect to the IT Services Terminal Server** (this should be near the top of the list).

The screen will change and it will almost look as if you are logging into the PC again, but in fact you are now logging into the Terminal Server:



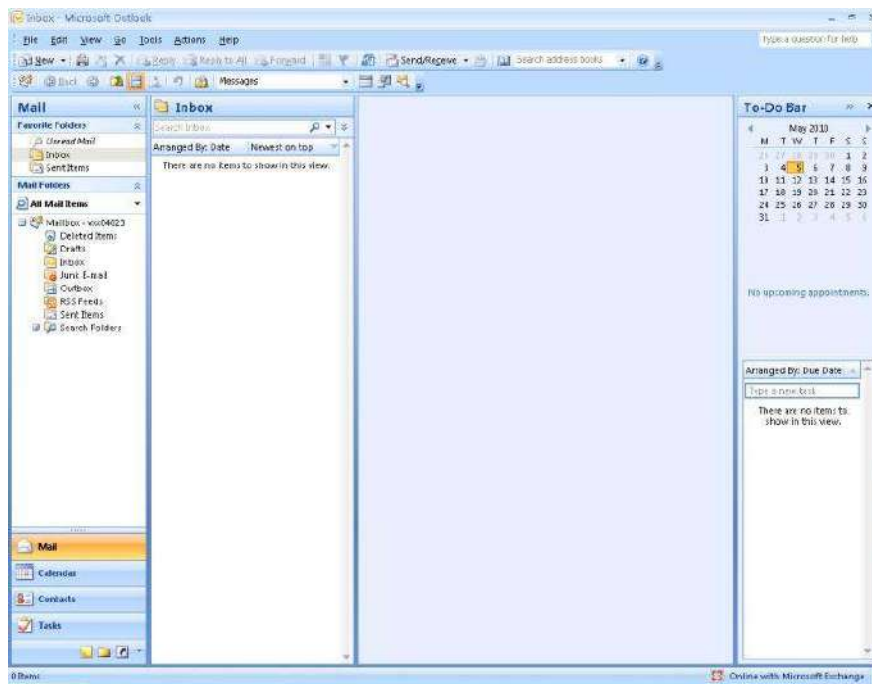
2. In the User name: box, type in the Outlook Exchange Class Training username that you have been given - it will be of the form **vxx040nn**, where **nn is replaced by numbers**
3. Type in the password for your Outlook Exchange Class Training username and click **[OK]** or press **<Enter>**

You should now be successfully logged into the Terminal Server from where you can access Outlook under Exchange.

Opening Outlook

To open Outlook:

1. Click on the Outlook icon (it is an orange colour with what looks like a clock inside it) in the Quick Launch area or taskbar to the right of **[Start]** in the bottom left-hand corner of the screen (if this is not showing, then click on **[Start]** followed by **All Programs, Microsoft Office** and finally **Microsoft Office Outlook 2007**)
2. Outlook should have already been setup and configured and the opening screen will look similar to below:



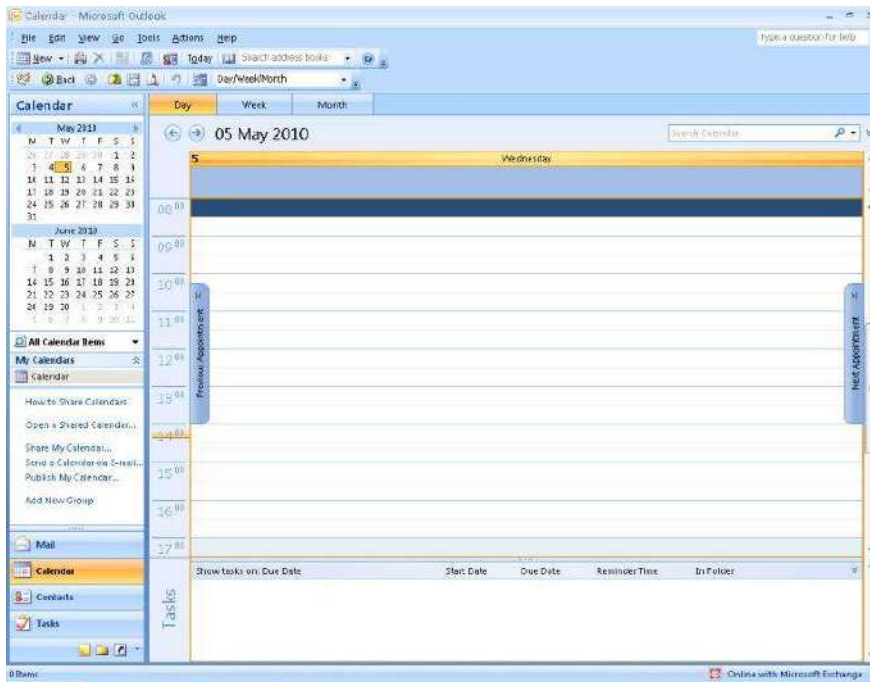
Note: On your own PC, the first time you use Outlook you will probably need to follow the notes to [Configuring Exchange Access](http://www.reading.ac.uk/internal/its/help/its-help-email/its-exchange/its-exchange-configure.asp) (<http://www.reading.ac.uk/internal/its/help/its-help-email/its-exchange/its-exchange-configure.asp>).

Using the Calendar

The Calendar is one of the most useful areas within Outlook. You can use it to keep track of both work and personal appointments, one-off or recurring appointments, give reminders to yourself of important events or dates, and setup meetings with others.

Creating an Appointment

To get to the Calendar in Outlook, click on the **[Calendar]** button in the Navigation Pane located in the bottom left-hand corner of the Microsoft Outlook window, just underneath the **[Mail]** button. Your screen should look similar to the following:

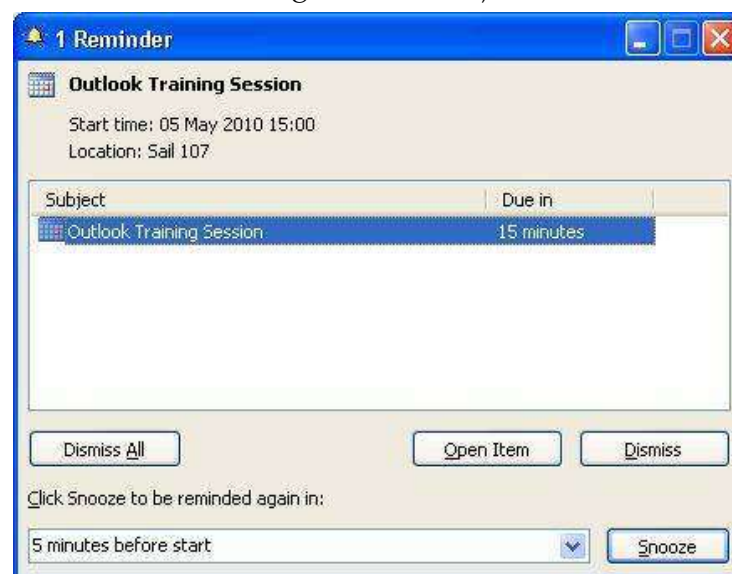


Let's put in an appointment for a bit later today. There are a few ways to create an appointment, but perhaps the easiest/most visual way is as follows:

1. Depending on the time of this training session, click in the main Calendar grid next to either 1100 or 1500 to select the time for your appointment - this selected area on the Calendar (a half-an-hour slot) should go blue (if you want a longer slot/time, just drag down on the mouse to include the next half-an-hour or more)
2. **Right** click on the selected blue area and choose **New Appointment** from the shortcut menu - you should get a window similar to the following:



3. An **Appointment** window will open in which you can enter a subject, location and description, along with other information. For the **Subject**, type in **Outlook Training Session**
4. Move to the **Location** box (either use the mouse or press the <Tab> key next to the letter Q on the keyboard) and type in the name of your training room, e.g. Sail 107 (after you have entered a few appointments in different rooms, you will find that you have a list of rooms to choose from)
5. You should find that the **Start time** and **End time** have already been setup according to your selection earlier, but you can still change these at this point. Note the **All day event** box - clicking this box means that your appointment becomes an all day event, and the start and end time boxes disappear as well as the reminder going to 18 hours before
6. In the large window/area below the End time box is where you can write a further description - put what you like here, or if you can't think of anything, try **This is the CSTD course I booked onto to learn more about using Outlook!**
7. On the **Appointment** ribbon at the top of the window, in the **Options** group, you'll find some useful boxes and icons. The **Show As** box is very useful as it tells not only you, but also other people who might be looking at your Calendar if you are busy or not at this time. The default setting is usually Busy. For this training session, click on the down-list arrow and select **Out of Office**
8. The **Reminder** box allows you to set whether Outlook should remind you of the appointment. This can be very useful, and the default setting is set to remind you 15 minutes before the appointment. Click on the down-list arrow to select a different reminder time, or none, if you want. The reminder will come up later on your screen (assuming you have Outlook still running) as a window similar to below (one option is to snooze it to remind you again later, a bit like what you can do with a morning alarm clock!):



9. You can give an appointment a category (at the same time making it more visible in your Calendar as it will have a different colour) by clicking on the **Categorize** icon and then choosing one of the categories from the list (you can change the default label settings and setup your own ones)
10. Click on the **[Save & Close]** icon at the start of the **Appointment** ribbon - you should find that the appointment is now setup in your Calendar in a different colour with a small vertical purple/mauve bar on the left-hand side, indicating that you're out of the office at that time

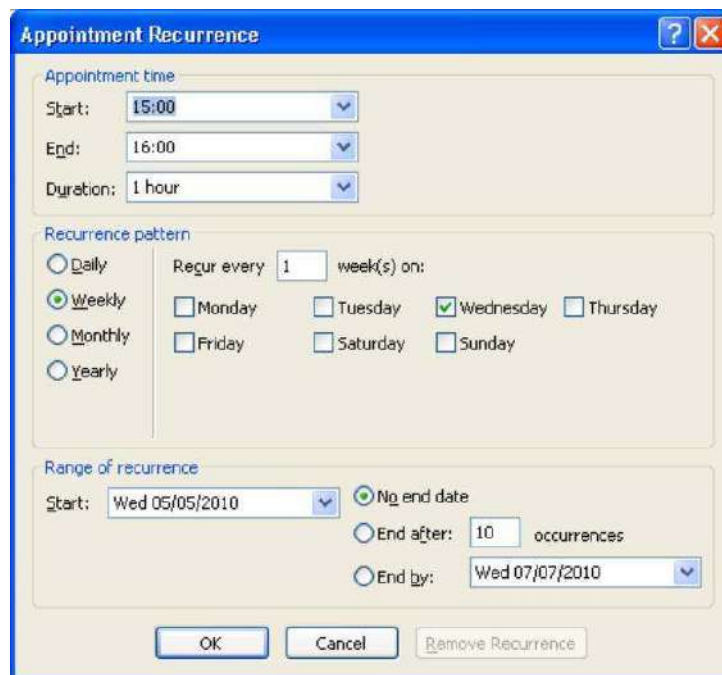
Note: You can also turn an email message that you receive into an appointment (or meeting) on your Calendar by dragging the message onto the **[Calendar]** button in the Navigation Pane (the

appointment is set to the next available slot on that day, with the subject the same as the subject of the email, and the email message filling out the description of the appointment).


A Recurring Appointment/Event

This Outlook Training Session is only timetabled for today, but let's say that it was running over 8 weeks - this is where the appointment/event can be made **recurring**, i.e. something that takes place at regular intervals.

1. Find in your Calendar the appointment that you've setup for the Outlook Training Session and double click on it to open it up
2. Within the **Appointment** window, click on the **Recurrence** icon in the **Options** group in the middle of the **Appointment** ribbon - you should see a window similar to below:



3. There are a number of options that can be changed, but in this case you only need to change when the recurring event ends - click in the radio button (circle) to the left of **End after:** and change the value from 10 to **8** in the box to the right
4. Click **[OK]** and then click on the **Save & Close** icon on the ribbon

You should find that there is now a  recurrence symbol in the Outlook Training Session appointment (bottom right-hand corner). If you now open this recurring appointment, you will see the following prompt:



You can decide to make a change just to this one occurrence of the appointment, or you can make the same change to all the appointments in the series. In this case, **[Cancel]** as you're not going to make any changes.

Changing the Calendar Layout, View and Other Defaults

Working with the Date Navigator

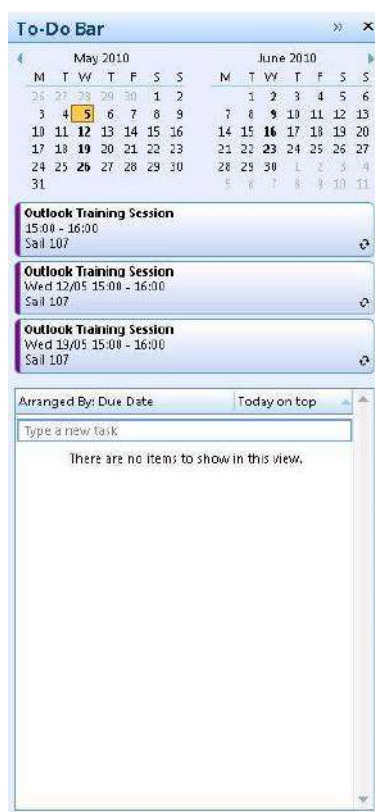
The **Date Navigator** (the mini-calendar in the top-left of your Outlook window) shows you the current month by default, and any numbers in bold indicate that there is an appointment/event on that day of the month. You should see this for the recurring appointment that you've just setup.

There are also arrow keys at the top of the Date Navigator (to the left and right of the month) that allow you to move forwards to the next month or backwards to the previous month. You can change the layout of the Date Navigator so that it appears on the right-hand side of the Outlook window, and you can expand it to show just more than the current month as follows (this could be useful if you wanted to move or copy an appointment from the current month to a future month):

1. On the **View** menu, click **To-Do Bar** followed by **Normal**

This will move the Date Navigator to the right-hand side of the Outlook window, and below it will show the next few appointments that you have followed by any tasks that you have setup. You can modify the layout in the To-Do Bar further through the View menu by switching the individual components on or off (i.e. date navigator, appointments and task list).

2. To expand the Date Navigator so that you can see more than 1 month, rest the mouse pointer on the split bar to the left of the Date Navigator. When the pointer becomes a double-headed arrow, drag the pointer to the left so that you can see two columns of little calendars for this and next month. It's up to you how many months you want to show, but this is how it would look if you've set it up this way:



Changing the Calendar View

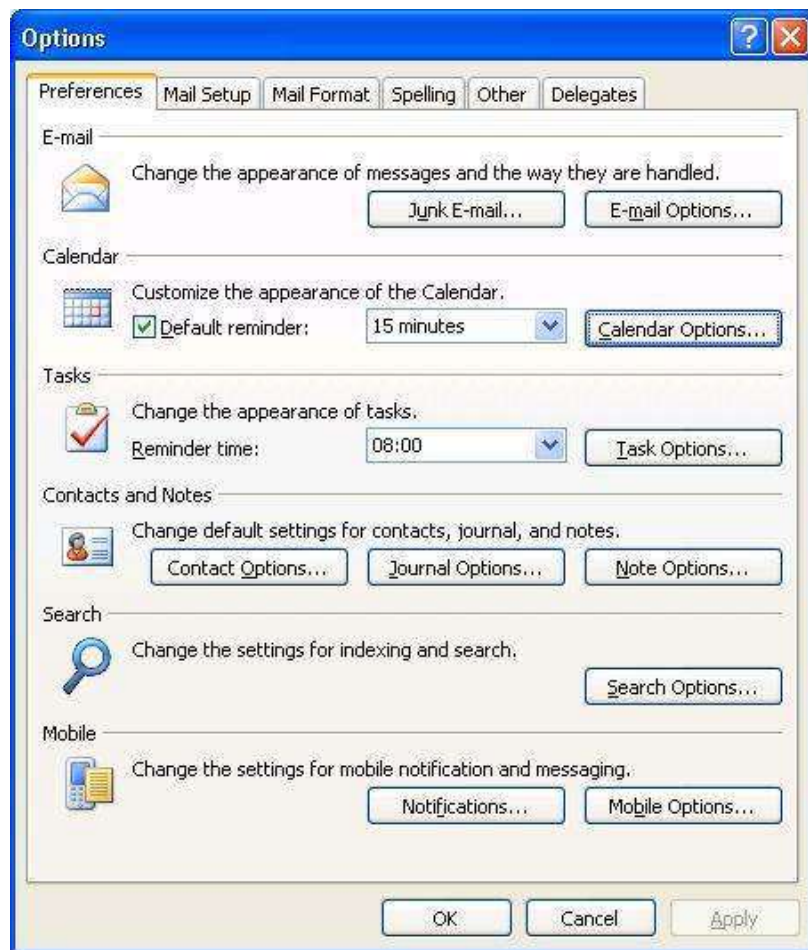
At the top of your calendar, just above the dates, you have buttons that can switch the view to a **Day**, **Week**, or **Month**. Try these out to see the difference. Return to **Day** view by clicking on the appropriate button.

Within Day view, the default time interval for appointment slots is 30 minutes, but you can change this by **right** clicking in the area where the times are shown to the left of the appointment slots, and choosing the time interval, say 15 minutes, that you want instead from the shortcut menu.

Other Calendar Defaults

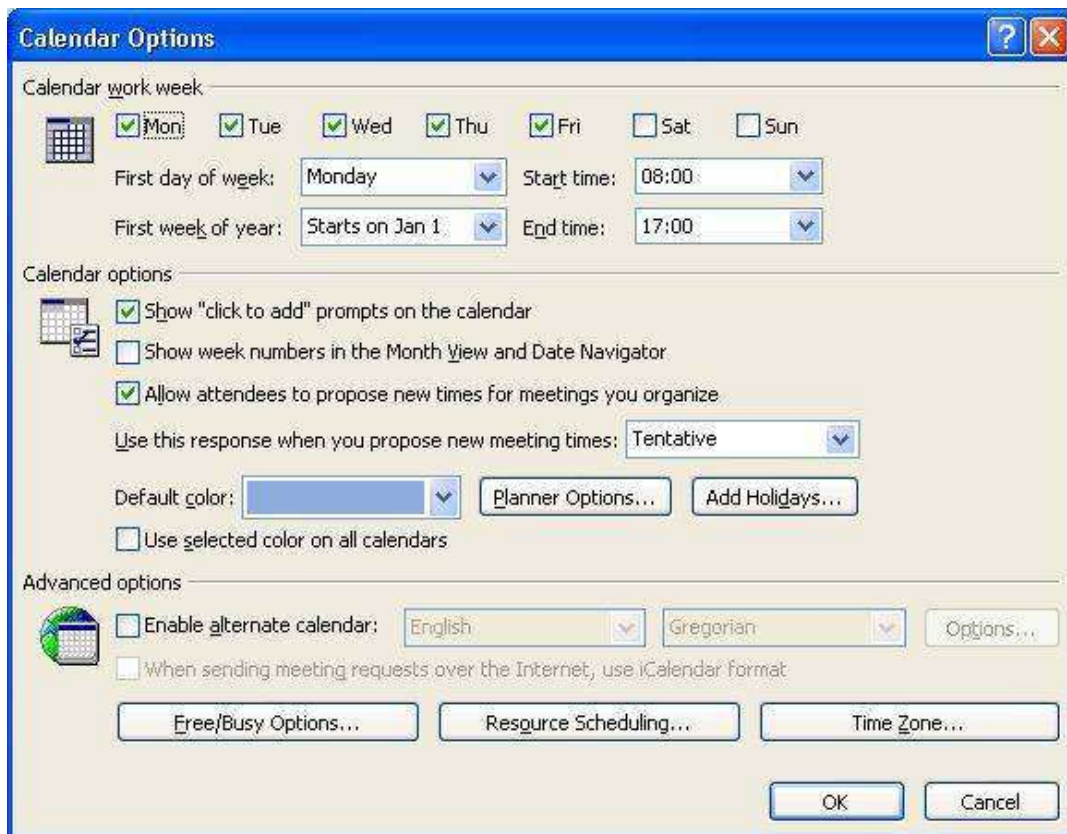
To see some of the other Calendar defaults that have been setup:

1. On the **Tools** menu, click **Options...**



2. In the **Preferences** tab, under the Calendar section, you'll see the option to change the time of the Default reminder or remove it completely

3. Click on [Calendar Options...] to get to more choices:



Here you can:

- Customize your work week if you work part-time or night shifts (appointments can be setup out of normal working hours) - select the check boxes for the desired working days and set the appropriate times in the **Start time** and **End time** boxes. You can also change the **First day of week** if you don't start work on a Monday
- Change the **default colour** of your calendar, usually blue at the start - particularly useful if you are looking at more than one calendar and need to distinguish between them
- A [**Add Holidays...**] button - the default for your Calendar is to include UK holidays, but if you also want to include holidays from another country or religious holidays, then this is where you would set this up
- A [**Free/Busy Options...**] button where you can change how many months of your calendar people can check to see if you're available for a meeting (they will only see if you're free or busy, but not the details of your appointments). The recommendation is to set this to **12** months
- A [**Time Zone...**] button which would allow you to show you the time as it is in another country (show an additional time zone) - this might be useful if your work involved travel abroad

If you want Outlook to go directly into your Calendar on start up:

1. On the **Tools** menu, click **Options...**, and then click the [**Other**] tab

2. Under **General**, click [**Advanced Options...**]



3. Next to Startup in this folder, click **Browse**
4. In the Select Folder dialog box, select **Calendar**, and then click [**OK**] **three** times to accept the change and close the open dialog boxes - test this out if you like by exiting from Outlook and then going back in again

As well as setting up Outlook to start in either your Inbox or Calendar, you could also choose Contacts, any other mail folder or your Mailbox. This latter option gives comes up with a screen giving you the next few days' appointments, a summary of current tasks, and the number of unread messages in your inbox.

Organising a Meeting

This is probably one of the areas that most people are interested in when they hear about Outlook. Organising a meeting is not that difficult to do, but finding out the dates/times when other people are available is more difficult and not always possible. Let's see how one would go about organising a meeting (it's really a special type of appointment) - firstly, you need to start with a possible meeting time/date and choose your attendees:

1. Click in the main Calendar grid to select the time for your meeting, say later today or tomorrow (you need to have the Calendar in **Week** view) - this area should turn blue

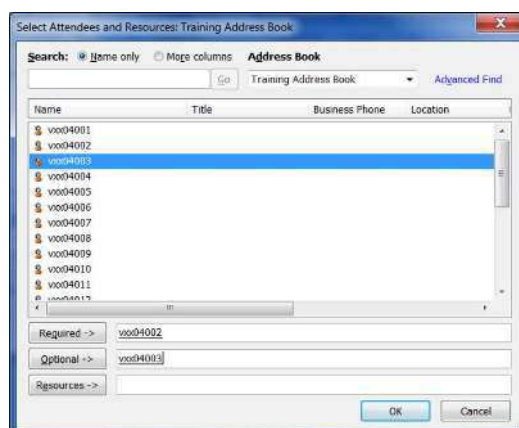
2. Click on the **Actions** menu and choose **Plan a Meeting**



3. You are the only attendee at present (as you are the organiser!). To invite other attendees, click on **[Add Others]** and choose **Add from Address Book...**

In the **Select Attendees and Resources** window that appears, a list of names from the **Global Address List** is shown. The Global Address List contains a list of all the users and groups that have accounts on the Exchange server. The majority of University staff have now been moved to Microsoft Outlook on Exchange.

4. Click on the **drop-down list-arrow** next to **Global Address List** and choose the last option in the list of **Training Address Book**
5. A list of the Outlook Exchange Class Training usernames (vxx040nn) will appear in the main part of the window - select the one that your neighbour is using and click on the **[Required]** button just below Message Recipients
6. Let's also invite someone else as an **optional attendee** to the meeting - select another username from the Training Address Book
7. Click on the **[Optional]** button just below **[Required]**



8. Click **[OK]**

You are returned to the **Plan a Meeting** window, and should now be able to check if your attendees are free to come to your meeting. Hopefully, you will be able to see this **free/busy time** information for yourself and for your neighbour on today's training session.

Note: If you see 'slashes' across the schedule for a particular attendee, this indicates that there is no free/busy time information available for that attendee. This could be because the attendee does not

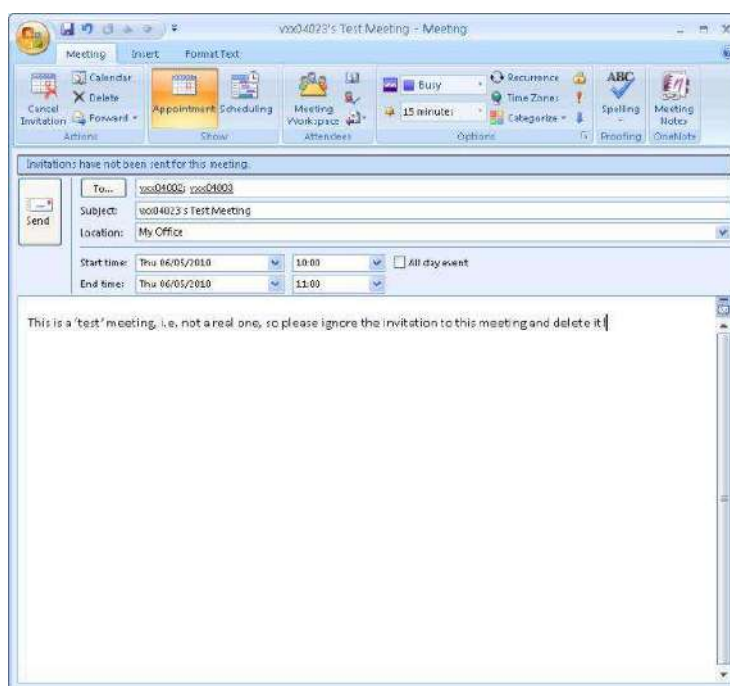
use Microsoft Outlook on Exchange, or that they haven't yet used the Calendar to make any appointments.

If the currently selected time for the meeting is no good as one of your attendees is busy or out of the office at that time, then click on **[AutoPick Next>>]** to find the next available free time (you can also move the time slot with the mouse or change the meeting start and end times).

The final steps are to fill in more details about the meeting and then send off invites:

9. Click on **[Make Meeting]**

10. A **Meeting** window is shown (similar to an **Appointment** window) - fill in the details for subject (e.g. Paul's Test Meeting, but **put your own name** so you can recognise your own meeting!), location and description, a bit like below:



11. Click on **[Send]**

12. You are taken back to the **Plan a Meeting** window - this time click **[Close]**

You should find that a Test Meeting entry has been put into your Calendar.

You will now have to wait to see if your attendees accept or decline the invitation to your meeting! You can keep a track on this by:

1. Opening up the Meeting item on your Calendar
2. Click on the **Tracking** icon in the **Show** group on the **Meeting** ribbon - here you can see if any of your attendees have responded yet
3. Close the **Meeting** window

As well as inviting people to your meeting, you should also find that you have been invited by email to another meeting by your Outlook Training neighbour!

1. To look at your email, click on the **[Mail]** button in the Navigation Pane (usually in the bottom left-hand corner of the Outlook window)

2. Click on the message about the meeting - it should look a bit like below:



You have the following choices:

- **Accept** a meeting that you know you'll be able to attend. When you accept a meeting, the meeting is scheduled in your Calendar and you receive updates if the meeting organiser changes the details of the meeting. If others view your free/busy time, the time appears as Busy by default
- **Decline** a meeting if you can't go. Declining a meeting deletes the item from your Calendar (freeing that block of time), but it does not cut your ties with the meeting: You'll still get updates if the meeting organizer makes them and you'll have the opportunity to respond to the update. (If you truly want to opt out of a meeting, you may want to ask the organizer to remove your name from the attendee list)
- **Tentative** - use this option if you're interested in the meeting, but aren't sure whether you'll be able to make it. The meeting is scheduled in your Calendar and that block of time is displayed to others as tentatively unavailable
- **Propose New Time** - when you choose this and propose a new time, the meeting organiser receives your request... but as with all things about the meeting, the organiser gets to make the final decision about the new meeting time
- **Calendar** - to check your calendar in a new window

3. Click on **Accept**



4. Go with the default of Send the response now by clicking **[OK]**

If you wanted to **Edit the response before sending**, e.g. to say that you'll be late for the meeting, then choose that option. The last option is not one that you should usually choose (as you won't get any updates about a possible changed meeting time).

5. Go back to your Calendar by clicking on the **[Calendar]** button in the Navigation Pane - you should find an entry for the meeting from your neighbour has been added

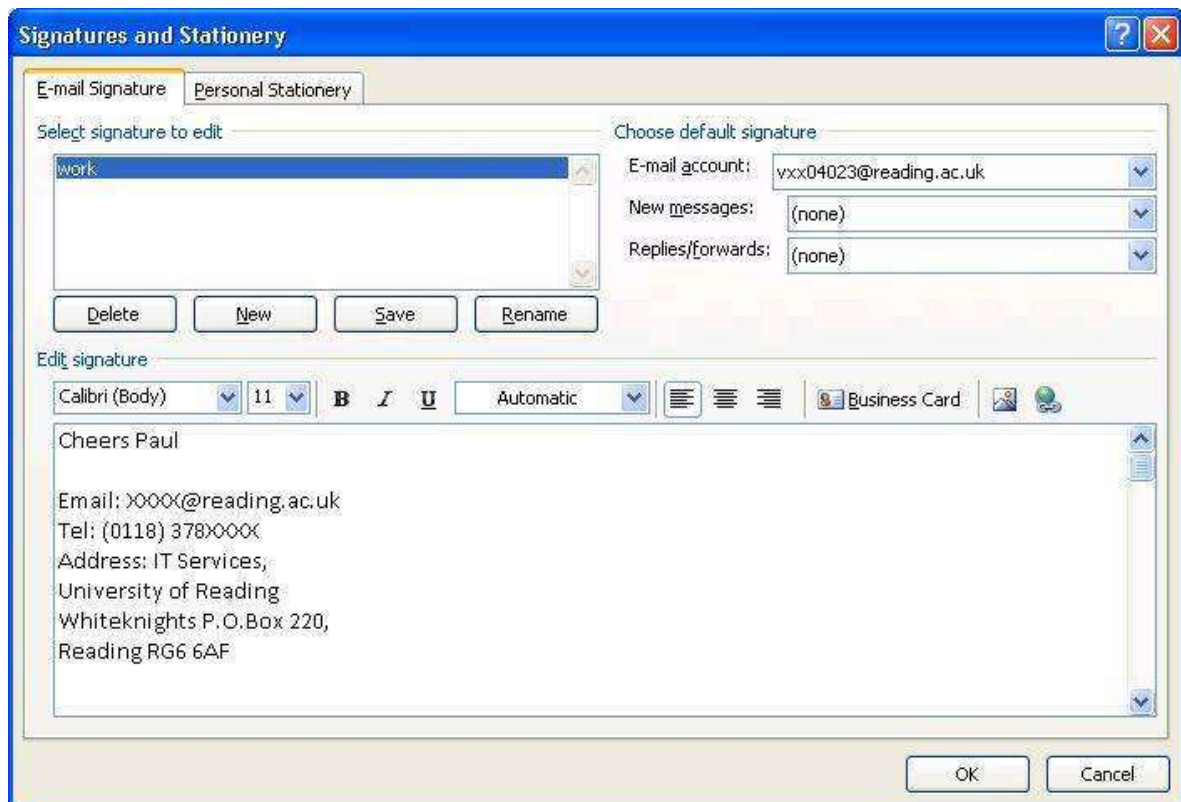
Using the Email System

Most, if not all, of you should already be familiar with using email. The next sections will show a few things that you might not already know or that are specific to email in Outlook.

Adding a Signature

An automatic signature can be set up so that when you send a message, contact information about you is automatically put at the bottom of your message without you having to type it every time. It is often useful to include your name, email address and contact phone numbers. Try setting up your own signature as follows:

1. Open the **Tools** menu and choose **Options...**
2. Click on the **[Mail Format]** tab at the top of the **Options** window
3. Click the **[Signatures...]** button towards the bottom of the window
4. In the **Signatures and Stationery** window that appears, click on **[New]**. Enter a name for your signature, e.g. **work**, and click **[OK]** (you could have one signature for work messages and a different one for personal messages)
5. Type in the information that you want in your signature - try and keep it plain and simple for now (there are formatting options to use different fonts, put on bold etc). An example of how a signature might look is given below:



6. Create a **second** signature for **personal** use, repeating steps 4 and 5 above
7. Setup **work** as the default signature for **new messages** by clicking on the appropriate dropdown list arrow and then click on **[OK]**. Click on **[OK]** again back at the **Options** window
8. The Calendar will probably still be showing from what was being done earlier - to get to the Mail in Outlook, click on the **[Mail]** button in the Navigation Pane, just above the **[Calendar]**

button. You will be looking at your Inbox - there may already be a message of an acceptance to your meeting by one of the attendees

9. Click on the **[New]** button (towards the top left-hand corner of your Inbox window) to send a message - you should now see your **work** signature at the end of your message

Tip: If you want to change the signature in your message to a different one, e.g. your personal signature, just right click on the signature and choose the other signature from the menu.

10. In the text box to the right of the **[To...]** button, type the letter **v** - you should find that it has remembered the email addresses beginning with v that you have used before when setting up a meeting. This is because **AutoComplete suggestion** has been turned on in Outlook. Select, using the mouse, one of the listed email addresses (which should hopefully be someone else on the class)

Note: AutoComplete suggestion is very useful, but sometimes it can be annoying as it may come up with email addresses that you may have only used once or no longer work. You can delete such an email address when the AutoComplete suggestion brings it up in the list (literally use the **<up>** or **<down>** arrow keys to select the address and press the **<Delete>** key on the keyboard). There is also an option to turn AutoComplete suggestion off completely via **Tools, Options..., [E-mail Options]** and **[Advanced E-mail Options...]** - turn **off** the **Suggest names while completing To, Cc, and Bcc fields** check box.

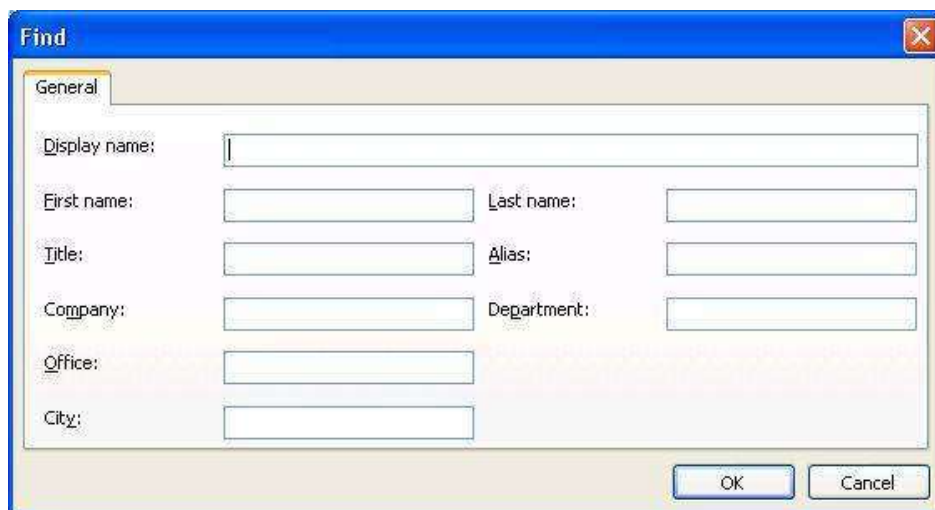
Another option in the same area, i.e. **Tools, Options..., [E-mail Options]** and **[Advanced E-mail Options...]**, that says **Allow comma as address separator** should be turned **on** to allow for cases where email addresses are being copied from another system to Outlook, e.g. the RISIS system, specifically where a tutor wants to send emails to students on a particular RISIS module.



11. Send a carbon copy of the new message to the Training username that you're using by clicking on the **[Cc...]** button - note that the default setting (i.e. how Outlook is setup when you first use it) is that a copy of every message you send is saved in a **Sent Items** folder (you can turn this off if you want via **Tools, Options...** and **[E-mail Options]**)

In the **Select Names** window that appears, a list of names from the Global Address List is shown.

12. Click on the **drop-down list-arrow** next to **Global Address List** and choose the last option in the list of **Training Address Book**
13. A list of the Outlook Exchange Class Training usernames (vxx040nn) will appear in the main part of the window - select your Training username and then click on the **[Cc]** button just below Message Recipients
14. Click on the **drop-down list-arrow** next to **Training Address Book** and choose **Global Address List** (near to the top of the list). You are going to try and find your Reading email address
15. Click on the **Advanced Find** link to the right of the drop-down list. A Find window should appear as below:



The image shows a 'Find' dialog box with a blue title bar and a close button (X) in the top right corner. The dialog is divided into a 'General' tab. Below the tab, there are several input fields arranged in two columns. The first column contains: 'Display name:', 'First name:', 'Title:', 'Company:', 'Office:', and 'City:'. The second column contains: 'Last name:', 'Alias:', 'Department:'. At the bottom right of the dialog, there are two buttons: 'OK' and 'Cancel'.

16. Put in your **lastname** and, if necessary to distinguish yourself further, your **firstname** and/or **department**. Click **[Ok]**. Back at the **Select Names** window, hopefully you should be able to find your full name in the list (you may need to scroll down)
17. Click on your name in the list and then the **[Bcc]** button - your name (underlined), which represents your Reading email address, should have been copied into the text box next to **[Bcc]** (if your name is not found in the Global Address List then click in the text box next to **[Bcc]** and type in your **full Reading email address**)

Note: **Bcc** stands for **Blind Carbon Copy**, and means that other people who receive the message will not know that it has also been sent to the blind carbon copy email address, in this case yours. This can be useful in the case where you want someone to get this message, but not allow the other receivers to know who this someone is. It can also be used when you're sending a message to a large number of people, but be aware that this is **not** normally recommended practice as it is a technique often used by spam mailers (it's better to setup or use a mail list with a specific email address).

18. Type in a subject for your message, then write a short welcome to your class colleague in the main message window and click on **[Send]**. you should receive a copy of this message in your Inbox as you Cc'd it to yourself

Note: You may find that when you first use your Exchange account, no emails seem to be arriving there. If this is the case then see the section under Email in the [Microsoft Exchange FAQ](http://www.reading.ac.uk/internal/its/help/its-help-email/its-exchange/exchangefaq.aspx) (<http://www.reading.ac.uk/internal/its/help/its-help-email/its-exchange/exchangefaq.aspx>).

Tips on Using your Mailbox

Here are some tips that you may find useful.

The Reading Pane and AutoPreview

You will probably find that you can already see the content of one of your messages (the currently selected one) in your Inbox towards the right of your screen (just to the left of the To-Do bar if you have this showing). This is because the **Reading Pane** is on by default. This is good for security as you can view messages safely in the Reading Pane. Potentially malicious scripts or attachments are not activated or opened automatically in the Reading Pane. If you want to change the settings for the Reading Pane:

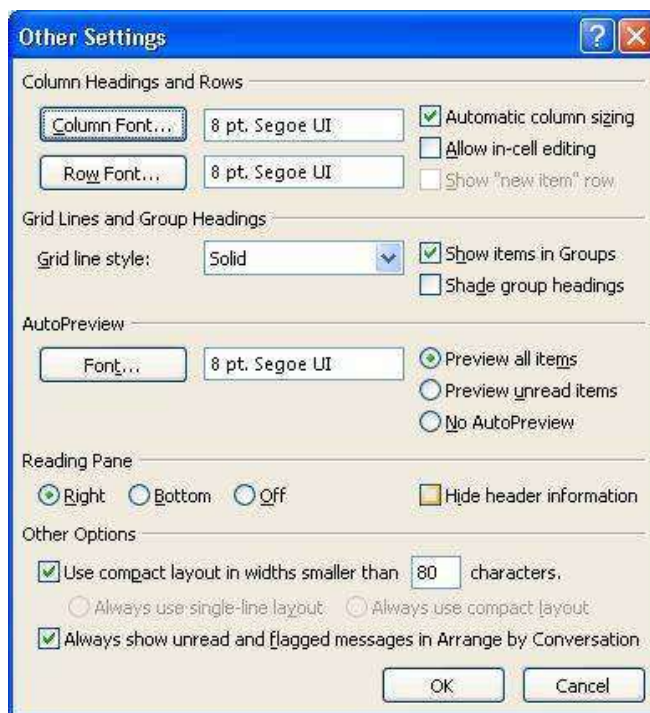
1. Open up the **View** menu
2. Choose **Reading Pane**
3. Select **Right**, **Bottom** or **Off**

From the above, you can see that you can have the Reading Pane below or to the right of your messages in the Inbox, or turn off the Reading Pane completely (in this case, you would need to double click on a message in the list to open it in its' own window).



A further refinement is to have **AutoPreview** turned on. This allows you to preview the first three lines of messages in your Inbox, and so gives you some idea of what the message contains before you look at it in more detail. To do this, go to the **View** menu and click **AutoPreview**.

This will apply to all the messages in your Inbox - if you just want it to be shown for only new messages, then a few more steps have to be carried out:

1. On the **View** menu, point to **Current View**, and then click **Customize Current View**
2. Click **Other Settings** and a window similar to below should appear:



3. Under the **AutoPreview** section, click **Preview unread items**
4. Click **[OK]** 2 times

At the top of your screen, just below the menus, you should have both the **Standard** and **Advanced** toolbars showing. On the second **Advanced** toolbar, you should see buttons to turn on or off both the Reading Pane () and AutoPreview ().

Arrange by Conversation

If you receive many e-mail messages daily, you could benefit from a grouping option called **Arrange By Conversation**. Arrange By Conversation view shows your message list in a conversation-oriented or "threaded" view. Each conversation can be expanded further to show all messages in the conversation, including messages you have already read.

To be able to see the above in action, you will need to reply to the message that your neighbour just sent you:

1. Select the message (not the meeting invitation) that your neighbour sent
2. Click on the **[Reply to All]** button on the Standard (top) toolbar - this will mean that both your neighbour and yourself will get this reply (if this isn't the case then put on the other username by hand)
3. Write your reply and **[Send]** it

Your reply should now appear in your Inbox. By default, the messages are arranged by date with the newest on top. To arrange by conversation, just click on the **View** menu followed by **Arrange By**, and finally **Conversation**. You should now see a small icon looking like a down-arrow in a box to the left of one of the messages in your Inbox:



If you click on this down-arrow, you should now see both the original message in the conversation and the reply underneath it.

Colour Coding Messages

One way of identifying particular messages in your Inbox is to use **colour coding** (other ways are to use **folders** for different messages if you have problems distinguishing colours or to setup **rules** and **alerts**). For example, you could use a colour to identify messages from a particular person such as your class neighbour:

1. Select a message in the Inbox from your neighbour
2. Open up the **Tools** menu and choose **Organize**

3. A **Ways to Organize Inbox** window will appear above your Inbox. On the left-hand side of this window, click on **Using Colors**:



4. Choose the colour that you want your neighbour's message to be shown in by clicking on the dropdown list arrow next to Red and picking the colour you want. Click on **[Apply Color]**
5. To close the Ways to Organize Inbox window, click on the **X** next to **Automatic Formatting...**

The changes you have made should now be reflected in your Inbox list. Note that you can setup more advanced rules for your emails through **Tools, Rules and Alerts...** – for some examples of how to do this, see the [Outlook Rules](http://www.reading.ac.uk/internal/its/help/its-help-email/outlookrules.aspx) (<http://www.reading.ac.uk/internal/its/help/its-help-email/outlookrules.aspx>) web page. These can be used to sort, redirect or delete emails as they come in, amongst other actions.

Favourite Folders

Here you can keep the folders that you use most often so that it's much easier to find them and save messages into them. Let's create a new folder, save one of our messages in it, and then add that folder to the **Favorite Folders**:

1. To create a new folder, click on **File, Folder, New Folder...**
2. Type in a name for your new folder, e.g. Test Messages
3. Make sure you click on **Mailbox - your_username** at the top of the list of where to save the folder
4. Click **[OK]**

You should now see the new folder under **Mail Folders** (just under Favorite Folders on the left-hand side). To move this new folder into the Favorite Folders section, **right** click on your new folder and select **Add to Favorite Folders** (an alternative is to drag the new folder):



You should now find that a copy of the new folder is in the Favorite Folders section. Save one of your messages into the new folder (just drag it across).

For Follow Up Folder

The folder named **For Follow Up** always contains an up-to-date list of all Quick Flagged messages in every folder in your mailbox. So you can use it to flag messages that you know need following up - in this way it can be used as a to-do list. To see how you can use this:

1. Looking at the list of messages in your Inbox, you should notice a faded flag to the right of each. Click on this **flag** next to one of the messages (not your meeting invitation) - you should find that it goes **red**
2. If you look at your **To-Do Bar** on the right of your screen (**View, To-Do Bar, Normal** to show it again), you should notice the new flagged message as a task at the bottom:



3. By **right-clicking** on the red flag next to the message, more options are available with different coloured flags standing for things like **Tomorrow, Next Week, Custom...** etc. Another option is **Add Reminder...** under which you can give a date and time for the reminder to be set. Click on this to get a dialogue box like below:



4. Change some of the details like the **Due date** and/or **Reminder** if you want and then click **[OK]**

The **For Follow Up** folder is a special type of folder called a **Search Folder**, but it isn't yet showing. To enable it to show:

5. Your **Search Folders** appear under **Mail Folders** on the left-hand side of your window. You may need to scroll down to see them and click on the + next to **Search Folders**.

Other Search Folders that may have been setup are **Unread Mail**, **Categorized Mail** and **Large Mail**. If you receive any attachments then you will find that another Search Folder called **With Attachments** is created.

6. **Right** click on **Search Folders** and choose **New Search Folder...**

From here you can choose from a list of pre-defined templates or create a search with custom criteria and save it as a Search Folder for future use.

7. To setup a **For Follow Up** folder, click on **Mail flagged for follow up** and then [OK]:



A **For Follow Up** folder should now be showing under **Search Folders**, and will contain a copy of the flagged message. This can be added to **Favorite Folders** if you like.

Blocked Attachments

You will find that in Outlook there are certain files that will be automatically blocked if they have been sent as attachments. These include executable programs with an extension of **.exe**, Active Server Pages with an extension of **.asp**, and, perhaps more surprisingly, Microsoft Access related files including database files with an extension of **.mdb**

If you receive a blocked attachment, you'll need to contact the sender and ask that person to resend the file using one of the following methods:

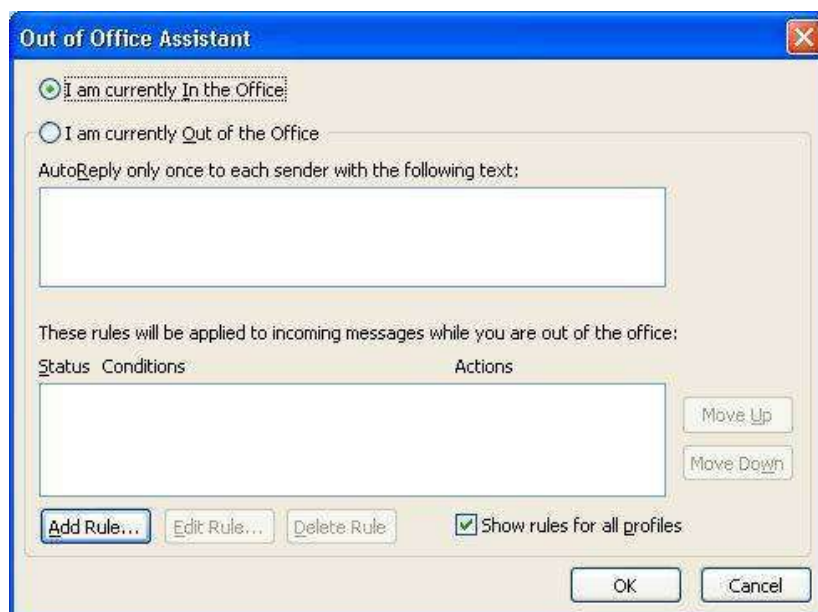
- **Zip** it into a zip-compressed file - you will need to have something to **unzip** it on arrival
- **Link** to it - if you share a file server with the recipient, you can put the file there and send a link to the file rather than sending the file itself.
- **Rename** it - you can rename the file and use a filename extension that Outlook won't block, such as **.txt**. When you do this, you may need to include some instructions in your message on how to open the file.

For further details, open up the **Outlook online help** and search for **blocked attachments**.

Away from the Office

If you're going to be away from the office, you should consider setting up a **vacation/holiday message**. This can be done as follows:

1. Click **Tools**, then select **Out of Office Assistant** - a dialogue box similar to below appears:



2. Ensure that **I am currently Out of the Office** is selected
3. Write your message in the first box under **AutoReply**
4. If you want to setup any rules for while you're away, e.g. move particular emails to a specific folder, then use **[Add Rule...]**
5. Click **[OK]**

When you next run Outlook on your return, it will come up with a warning in the bottom right-hand corner of your Outlook window saying that **Out of Office auto-replies are on**. Click where it is pointing and choose **Turn off Out of Office auto-replies** to show that you are back in the office.

Whilst you're away, you can use **OWAmail** (Outlook Web Access) to access your email at the University of Reading on any computer that has access to the internet. See the [OWAmail Quick Guide](http://www.reading.ac.uk/web/files/www_File_Library/owamail.pdf) (http://www.reading.ac.uk/web/files/www_File_Library/owamail.pdf) for further details.

If you wanted to allow somebody else to use your own Inbox whilst you're away, then look at the section under **Allowing access to your Inbox** on the [Exchange Mailbox Tasks](http://www.reading.ac.uk/internal/its/help/its-help-email/its-exchange/its-exchange-mailboxtasks.aspx) web page (<http://www.reading.ac.uk/internal/its/help/its-help-email/its-exchange/its-exchange-mailboxtasks.aspx>).

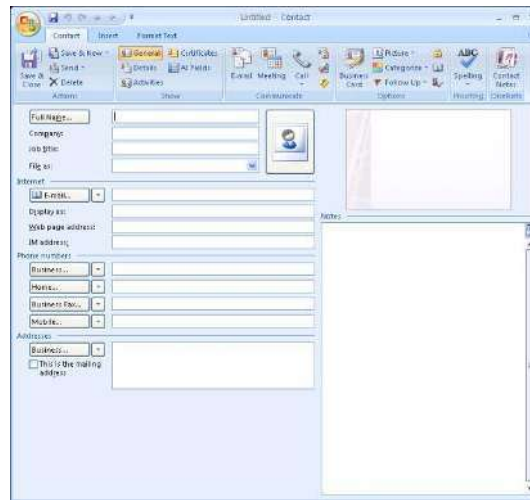
Using Contacts

This training course has mostly concentrated on using the Calendar and Email in Microsoft Outlook, but now let's take a brief look at Contacts (for further information on importing address books and looking at the differences between contacts and address books, look at the online help within Outlook).

The sections below come from our [Exchange Contacts](http://www.reading.ac.uk/internal/its/help/its-help-email/its-exchange/its-exchange-contacts.aspx) web page (<http://www.reading.ac.uk/internal/its/help/its-help-email/its-exchange/its-exchange-contacts.aspx>) which also tells you about the Global Address List, your address book, and setting up a distribution list.

Adding a New Contact

1. Click on the [**Contacts**] button in the Navigation Pane
2. At present, there will be no contacts - to create a new contact just double click where it says to **create a new contact** (or click on the **New** button - the first button on the toolbar)



3. Enter in the information as required, either for yourself, a colleague or a friend:
 - You should enter a name in the box marked Full Name. If you click on the [**Full Name**] button then you can enter information regarding the user's title, first name, last name etc.
 - Under **File as:** you can choose to store your contacts in either alphabetical order of the surname or the first name
 - There are three different email addresses that you can add, and these are displayed by clicking on the down arrow by the **E-mail...** box. You should enter at least one email address.
 - You can enter as much other information as you wish. Under **Details** in the **Show** group on the ribbon, you can store 'important' dates such as the contact's **birthday** and **wedding anniversary!**
4. When you have finished adding information, remember to click [**Save & Close**], the first icon on the ribbon

Current View of Contacts

This is currently set to **Business Cards** as shown below:



You can set this to a different view if you prefer, e.g. **Address Cards**.

Adding an Address from an Email

You can add someone to your Contacts if they have sent you an email as follows:

1. Click on the **[Mail]** button in the Navigation Pane and select one of the emails you received earlier
2. Inside the message window/pane, select the address that you want to add (e.g. your neighbour's training username), and **right** click on it
3. Select **Add to Outlook Contacts...** from the shortcut menu
4. The contact box should open, and you can add as much information as before (note that the full name and email address have already been added)
5. When you have finished adding information, remember to click **[Save & Close]**

Sending an Email to a Contact

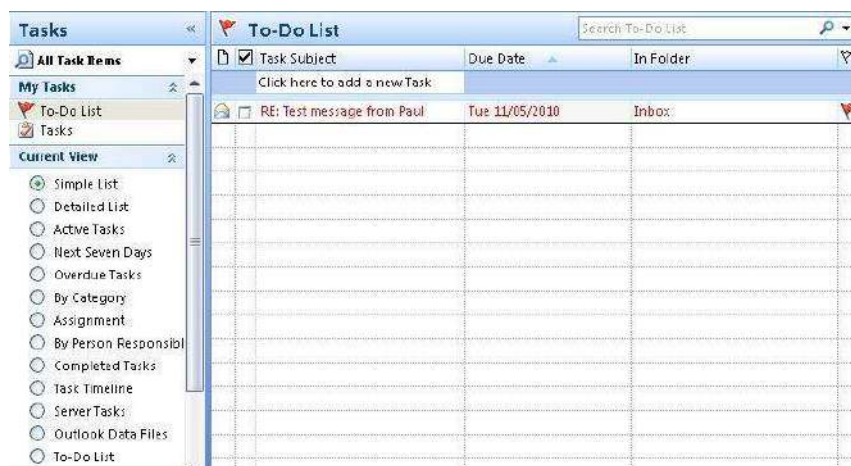
To send an email to someone in your Contacts (assuming you're still looking at your email messages):

1. Click the **[New]** button on the top, standard toolbar
2. Click on the **[To...]** button next to where you would normally type the email address of the person you are sending the email to
3. Click on the drop-down list-arrow under **Address Book** and currently showing **Global Address List**, and scroll up the list to choose **Contacts**
4. Choose one of the names you have put into your Contacts and click on the **[To]** button at the bottom of the **Select Names** window
5. Click **[OK]**, type in your subject and message and then send it to your contact

Setting up a Task

You might have noticed earlier that a to-do list could be setup using a For Follow Up folder. Another way of setting up tasks is as follows:

1. Click on the **[Tasks]** button in the Navigation Pane
2. As a message was flagged earlier, it's probably showing the **Current View** as a To-Do List – change this to **Simple List** so the screen looks similar to below:



3. Click where it says **Click here to add a new Task**

4. Type in something like **Look at further things to do in Outlook** and press <Enter> - you should find that this has now been setup as a new task

To add further details to the task, double click on it to open it up - you can then specify details such as the due date, the current status (e.g. not started, in progress etc.) and how much of it has been completed in percentage terms.

Further Information

Here are some ways to get further information or help:

- Microsoft Outlook has its own **built-in Help** system, which contains a considerable amount of information as well as tips and examples. It can be accessed in the usual ways:
 - Opening the **Help** menu
 - Pressing key <F1>
 - Clicking on the **question mark icon** at the end of the top **Standard** toolbar
 - Putting in your own query in the text box where it says **Type a question for help**
- A more advanced course, [Outlook 2007 Hints & Tips](http://www.reading.ac.uk/web/files/its/Outlook2007Tips.pdf) (<http://www.reading.ac.uk/web/files/its/Outlook2007Tips.pdf>) has been developed which has sections on:
 - Organising email
 - Printing emails
 - Sending emails
 - Sharing information
 - Calendar
- Further documents on using Microsoft Outlook at the University are available from the IT Services [Staff Email Documentation](http://www.reading.ac.uk/internal/its/help/its-help-email/its-exchange/its-staff-email.aspx) web page (<http://www.reading.ac.uk/internal/its/help/its-help-email/its-exchange/its-staff-email.aspx>)
- Microsoft's own website has some very useful online training courses on [Outlook 2007](http://office.microsoft.com/en-gb/training/HA102188671033.aspx) (<http://office.microsoft.com/en-gb/training/HA102188671033.aspx>)

Logging Out

You have now finished this training session, so shut down any open windows and log out:

1. Close Outlook by clicking on its **[Close]** button
2. To logout from the Terminal Server, click on **[start]**, choose **Log Off** and press <Return> for **[Log Off]** to confirm this
3. Finally, on IT Services machines, to logout from your personal username, click on **[start]**, choose **Log Off**, and press <Return> for **[Log Off]** to confirm this

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