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Microsoft® Office Outlook® 2007 Training

Making the Switch



Course contents

- Overview: A new version of Outlook
- What's changed and why
- Find everyday commands
- Send and receive attachments and pictures

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Overview: A new version of Outlook

Look out! There's a new version of Outlook.

It has a whole new look along with new features. But don't worry, that doesn't mean you'll need to spend a lot of time learning a new program.

Instead, the new design and new features will help you more efficiently and easily accomplish the tasks you do in Outlook every day.

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Course goals

- Move around in Outlook 2007. Learn about the things that have changed, and why.
- Find commands on the Ribbon and do the things you do every day: read and send e-mail, work with appointments and meetings, and use your contacts.
- Send and receive pictures and attachments. Ensure that recipients will be able to open attached files that use the new 2007 Microsoft Office release file formats.

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What's Changed and Why

What's changed and why



The first time you create a message in Outlook 2007 (or open one you receive), you'll see **the Ribbon**.

It's the band across the top of the window.

One of the most dramatic changes in Outlook, the Ribbon gives Outlook its new look.

But as you get up to speed, you'll see that the change is more than visual—it's there to help you get things done more easily and with fewer steps.

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Introducing the Ribbon



A new e-mail message --
The Ribbon is at the top of the window.

The Ribbon is visible each time you create or edit something in Outlook.

Why the new system? Microsoft carefully researched how people use commands in Outlook.

As a result of that research, some Outlook commands are now more prominent, and common commands are displayed and grouped in ways that make them easy to find and use.

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A closer look at the Ribbon



To better help you learn how to use the Ribbon, here's a guide to its basic arrangement.

- ① **Tabs:** The Ribbon is made up of different tabs, each related to specific kinds of work you do in Outlook.
- ② **Groups:** Each tab has several groups that show related items together.
- ③ **Commands:** A command is a button, a box to enter information, or a menu.

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The Ribbon shows what you need



You'll encounter the Ribbon when you take certain actions such as creating messages, calendar entries, or contacts.

The Ribbon shows tabs and commands appropriate for what you're doing.

That is, the tabs on the Ribbon will differ depending on the area of Outlook you're working in.

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The Ribbon shows what you need



The picture shows some of these differences.

- ① A new message shows the **Message** and **Options** tabs.
- ② A new appointment shows the **Appointment** tab.
- ③ A new contact shows the **Contact** tab.

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There's more than meets the eye



A small arrow at the bottom of a group means there's more available than what you see.

This button is called the **Dialog Box Launcher**.

The picture shows that to see a full list of font options, you'd click the arrow next to the **Basic Text** group on the **Message** tab of a new e-mail message.

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The Mini toolbar



The **Mini toolbar** allows you to quickly access formatting commands right where you need them: in the body of an e-mail message.

The picture shows how it works:

- ① Select your text by dragging with your mouse, and then point at the selection.
- ② The Mini toolbar appears in a faded fashion. If you point to it, it becomes solid. You can click a formatting option.

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The Quick Access Toolbar



What's best about the Quick Access Toolbar? What's on it is up to you.

That is, you can add your favorite commands to it with a simple right-click.

The **Quick Access Toolbar** is a small toolbar above the Ribbon.

It's there to make the commands you need and use most often readily available.

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The Quick Access Toolbar



For example, customizations that you make to the Quick Access Toolbar for messages you send will not appear on the Quick Access Toolbar for Contacts.

You'll see and use different Quick Access Toolbars depending on the area of Outlook that you're working in.

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Keyboard shortcuts



If you use keyboard shortcuts instead of a mouse or other pointing device, you'll noticed that some shortcuts are the same but that others have changed.

With the introduction of the Ribbon, commands are in new locations, so shortcuts that begin with ALT will probably be different from earlier versions.

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Keyboard shortcuts



To find your way around:

1. Start by pressing ALT.
2. Press the indicated key to see the correct tab, and then press the letter to access the command you want.

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Know your options



Outlook provides many options to help you change how things look and work.

The way you access these program options hasn't changed.

As shown in the picture, you'll still click **Options** on the **Tools** menu from within the main Outlook window and use the **Options** dialog box.

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More about options



In Outlook 2007, you set options from a few different locations.

Options for writing e-mail

If you want to change your settings for writing e-mail—for example, to make the spelling checker stop ignoring words in uppercase—you do that from the **Editor Options** dialog box.

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More about options



In Outlook 2007, you set options from a few different locations.

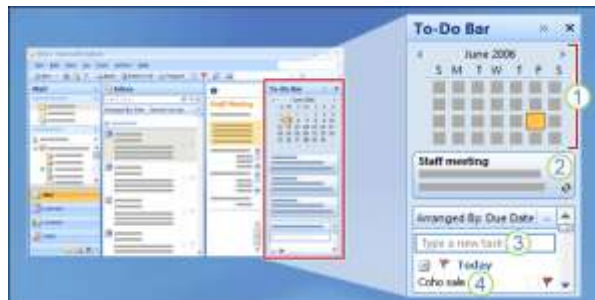
Start by creating a message, and then do this:

- ① Click the **Microsoft Office Button** .
- ② Click **Editor Options**.

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More that's new: the To-Do Bar



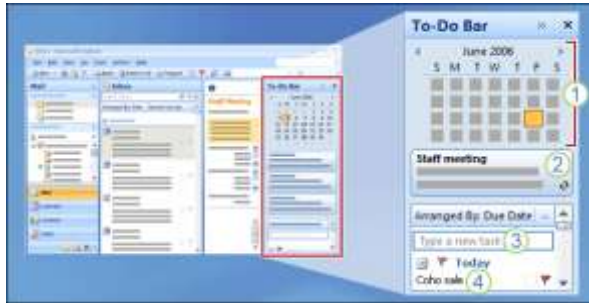
Located at the far right of the window, the **To-Do Bar** is visible wherever you happen to be working in Outlook.

The To-Do Bar is there to help you keep track of upcoming tasks and appointments.

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More that's new: the To-Do Bar



Located at the far right of the window, the **To-Do Bar** is visible wherever you happen to be working in Outlook.

The picture calls out a few of its key elements:

- ① Date Navigator
- ② Upcoming calendar appointments
- ③ A place to enter new tasks by typing
- ④ Your task list

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A new look for the calendar



The new design of the calendar in Outlook 2007 makes it easier to see what's what.

Moving around is easier, too.

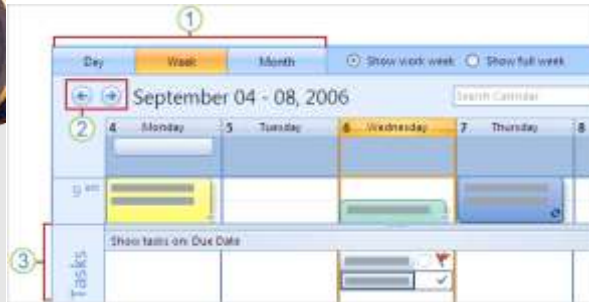
The picture shows some examples:

- ① Bigger buttons make it easier to quickly switch between daily, weekly, and monthly calendar views.
- ② **Back** and **Forward** buttons let you quickly go to the next day, week, or month in the calendar.

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A new look for the calendar



The new design of the calendar in Outlook 2007 makes it easier to see what's what.

Moving around is easier, too.

The picture shows some examples:

- ③ Also new is the **Tasks** area. It shows your current and upcoming tasks and tracks your accomplishments, too.

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A new look for contacts



In Outlook 2007, **Electronic Business Cards** make contacts easy to view and easy to share.

You'll first notice the new look for contacts when you click **Contacts** to switch to that area of Outlook.

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A new look for contacts



Notice that in this picture, the Navigation Pane is minimized to show more of the Contacts pane.

You can minimize the Navigation Pane from any area of Outlook by clicking the **Minimize the Navigation Pane** button.

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Find Everyday Commands

Create a new message



It's time to write and send your first e-mail message using the new Outlook.

What do you need to know? For starters, **some things haven't changed.**

The first thing you need to know to get started is that you don't need to know anything new. All of the old ways to start a new message still work.

In a new message, first get oriented to the Ribbon. The **Message** tab is on top, with the commands you're most likely to use every time you create and send a message..

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Create a new message



Using other tabs

If you're having trouble finding a command or button, you may need to look on another tab.

For example, to *insert* a picture so that it appears in line with the text of your message (not as a separate attachment), you'll need to switch to the **Insert** tab.

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Use the Address Book to add recipients



Do you use the Address Book to add names to the **To**, **Cc**, and **Bcc** fields?

You'll find the **Address Book** command on the **Message** tab.

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Show or hide the Bcc field



If you prefer to type e-mail addresses directly in the **To** and **Cc** boxes, you may also want to know how you can show the **Bcc** field so that you can type names there, too.

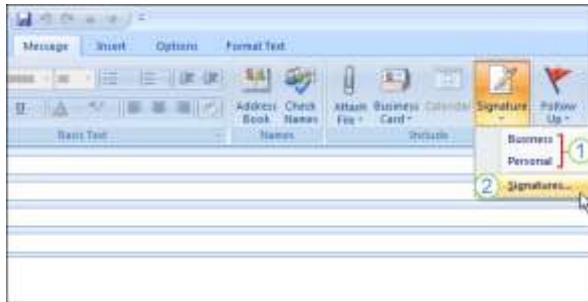
The picture shows the location of the **Show Bcc** command.

As you can see, you'll find it on the **Options** tab.

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Include your signature



Do you use a personal e-mail signature at the end of your Outlook messages?

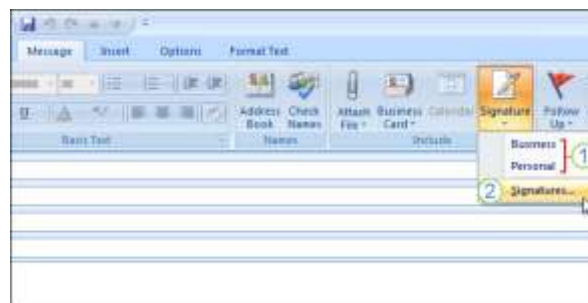
The same signature you used in earlier versions will be available when you upgrade to Outlook 2007.

If you didn't use signatures (maybe they seemed too complex or you could never remember how to create them or where to find them), you'll be surprised to see how easy signatures are in Outlook 2007.

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Include your signature



You can modify existing signatures or create new ones, as well as set a default signature.

Start by clicking the arrow under the **Signature** command.

The picture shows what happens next:

- ① If you created signatures previously, you'll see them listed here.
- ② To create new signatures, set a default signature, or modify existing signatures, click **Signatures**.

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Use flags and reminders



Flags and reminders can help you and others remember to do things.

To add a flag, reminder, or both when you're creating a message, start by clicking **Follow Up** in the **Options** group of a new message.

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Use flags and reminders



Follow up for yourself

Suppose you send a message to a colleague that says "I'll follow up with you tomorrow."

To be sure that you remember to do that, flag the message for yourself by clicking **Follow Up** and then clicking **Tomorrow**.

The message is flagged and added to your To-Do List in **Tasks**. It also shows up as an item in your own To-Do Bar.

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Use flags and reminders



Follow up for the recipient

You can also attach a follow-up flag for your recipients by using the **Flag for Recipients** command, highlighted in the picture.

Before you send the message, you specify when you want the recipient to be reminded to follow up with you.

As the picture shows, the received message will include a flag and the bell icon. As long as the recipient keeps the message in his or her Outlook mailbox, a reminder will be displayed at the time you specify.

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Respond to a message



E-mail isn't just about sending...

...it's also about receiving and replying.

When you reply from an open message, you'll use the buttons in the **Respond** group on the **Message** tab of the Ribbon.

You'll notice that what's on the Ribbon in a received message is different from what's on it for a new mail message.

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Make time and remember to do things



Outlook isn't just about e-mail.

It's also about organizing your time, which you do in the calendar.

When you create or open an item in your calendar, you'll see that the Ribbon shows groups and commands appropriate for helping you manage your time.

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Make time and remember to do things



When you create any type of calendar entry, a reminder is set automatically.

To change the reminder time for an appointment:

- ① On the **Appointment** tab, click the arrow to open the **Reminder** list and then select a time.
- ② Once you've made a change, click **Save & Close** on the far left of the Ribbon.

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Want to create a meeting? Invite others



An appointment is just for yourself.

When others are involved, create a meeting.

- ① On the **Appointment** tab, click **Invite Attendees**.
- ② A **To** button and box appear. Type names directly in the box or click the **To** button to add invitees by selecting from a list.

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Want to create a meeting? Invite others



An appointment is just for yourself.

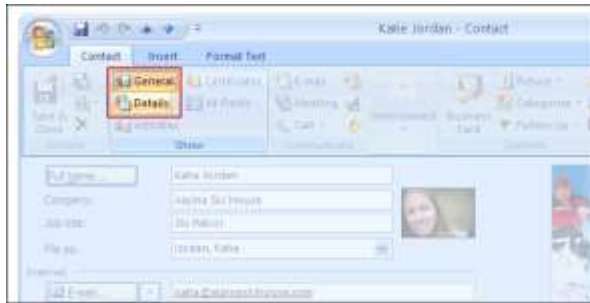
When others are involved, create a meeting.

- ③ Once you've entered all of the meeting details, click **Send** to send the invitation to the other meeting participants.

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Work with a contact



When you open or edit a contact, you'll use the buttons in the **Show** group to show or hide more information about a contact.

For example, if you want to note the birthday or anniversary of a contact, click the **Details** button and then select the appropriate date next to **Birthday** or **Anniversary**.

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Send and Receive Attachment and Pictures

Send and receive attachments and pictures



Sending and receiving attached files in Outlook 2007 is just as easy as it's always been—and in some ways, even easier.

When you receive attached pictures or Microsoft Office files, you'll be able to use the Attachment Previewer to preview those attachments right in the Outlook Reading Pane.

And if you're sending pictures, the Ribbon will help you send them just the way you want them.

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Include an attachment



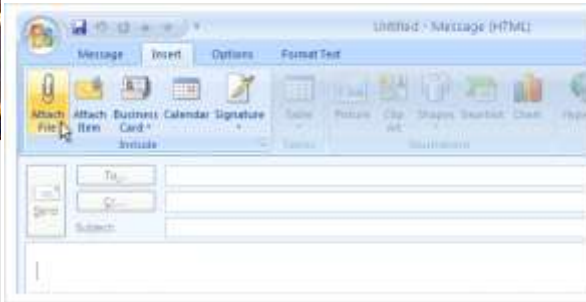
Including an attached document or picture with your message is easier than ever.

Just as you've always done, you'll begin by creating a new message. Then you'll use the **Attach File** command on the Ribbon.

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Include an attachment



The picture shows it on the **Insert** tab.

Where you'll find Attach File

Including an attachment is a common activity, so you'll find **Attach File** on both the **Message** tab and the **Insert** tab.

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Include an attachment



This behavior is unchanged from earlier versions.

You can't attach just anything

Outlook will block certain types of file attachments.

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Include a picture in line with text



In Outlook, it's easy to send pictures in the body of your e-mail messages instead of as separately attached files.

To do this:

- ① Click the **Picture** command on the **Insert** tab.
- ② As shown in the illustration, you'll see a picture in the body of the message.

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Picture this: tabs that come and go



Some tabs only appear when you do specific tasks.

For example, when you:

- ① Select a picture that you've inserted into a message...
- ② ...you'll see that **Picture Tools** appear on the Ribbon.
- ③ The **Format** tab includes commands that you can use to edit the picture before you send it.

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Preview attachments before you open them



In Outlook 2007, you'll receive attachments just as you did in earlier versions.

Now, some attached files can be previewed right from the Reading Pane.

Suppose someone sends you two Microsoft Office Visio® diagrams as attachments, but you only care about the one that shows the new training room in your building.

How could you quickly decide which file to open or save to your hard disk?

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Preview attachments before you open them



As the picture shows, attachment previewing could be your answer.

Attachment previewing allows you to display previews of certain file types right from the Outlook Reading Pane. You can do this without having to open the attached files.

To preview an attachment, click its icon. The attachment preview appears in the Reading Pane.

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How others receive attachments that you send



When you use Outlook 2007, people will receive attached files that you send just as they always have.

What has changed is the file format used by some 2007 Office system programs.

Attachments that you send or receive may use this new format, which keeps file sizes smaller and helps keep files safer. Outlook fully supports sending and receiving files that use the new formats.

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How others can view attachments that you send



If you'll be sending a Word 2007, Excel 2007, or PowerPoint 2007 file to someone who hasn't yet upgraded to the 2007 release of Office, there are two options.

- You can save the file in the 97-2003 file format before you send it.
- Colleagues who have Microsoft Office versions 2000 through 2003 can open, edit, and save 2007 files by installing the Microsoft Office Compatibility Pack for 2007 Office Word, Excel, and PowerPoint File Formats, offered free by Microsoft.

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Modified Functionality

- For Follow Up Flags – replaced by task flags and color categories. No longer see colored flags in the mail view. If you flagged items in the earlier version of Outlook to indicate that they were important you should now use color categories instead. If you used flags to indicate the time at which you were to take action on an item, you should now use task flags.
- Follow Up Button – The Follow Up Button and the Flag for Follow Up dialog box are replaced by a drop-down menu. The flagging feature has been enhanced.

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Discontinued Features

- Task Pad – no longer see in the calendar, replaced by the new To-Do Bar
- Meeting Updates – meeting organizer can no longer change the time/location without sending an update nor delete a meeting without notifying people
- Free/Busy Bar – Removed on calendar items if the item is marked as busy.
- Meetings Icon – Removed from calendar items.

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Class Evaluation

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