WWDCS

Microsoft Outlook 2007 Training Sessions

Session I: Wednesday, August 29th, 2007

Session I: Outlook 2007 Introduction and Overview	August 29, 2007 11:30 AM – 12:30 PM	• Introduction and overview • Setting Up an Email Account • Creating and Customizing Your Outlook Profile • Customize the Outlook Workspace • Preparing for the next Session

I: Introduction and Overview: Microsoft Outlook 2007

What is Microsoft Outlook?

Microsoft Outlook a component of the Microsoft Office package is a personal information manager. Within the software, users have the ability to read and manage email, arrange contacts, setup meetings and schedule tasks.

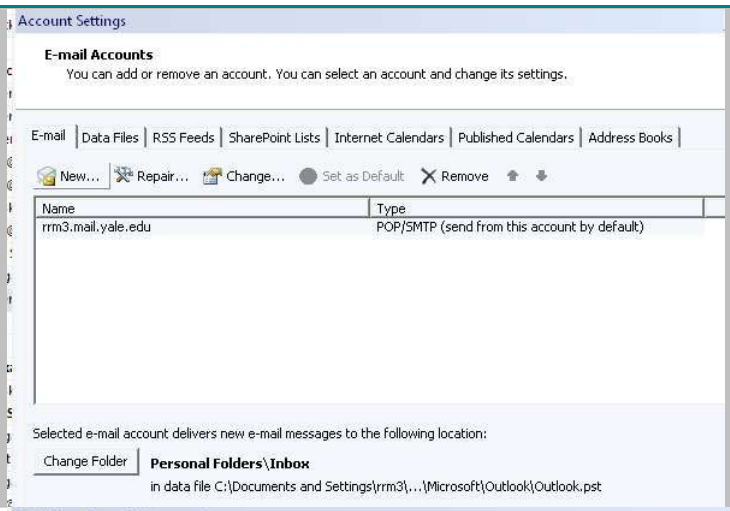
II: Setting Up an Email Account

Running Outlook for the 1st time: The first time Outlook is launched from the Start Menu or the shortcut on the desktop, the Outlook 2007 Startup Wizard will appear.

Launched Outlook before: If you have launched Outlook before you must launch the Accounts wizard within Outlook **Proceed to Step #2**

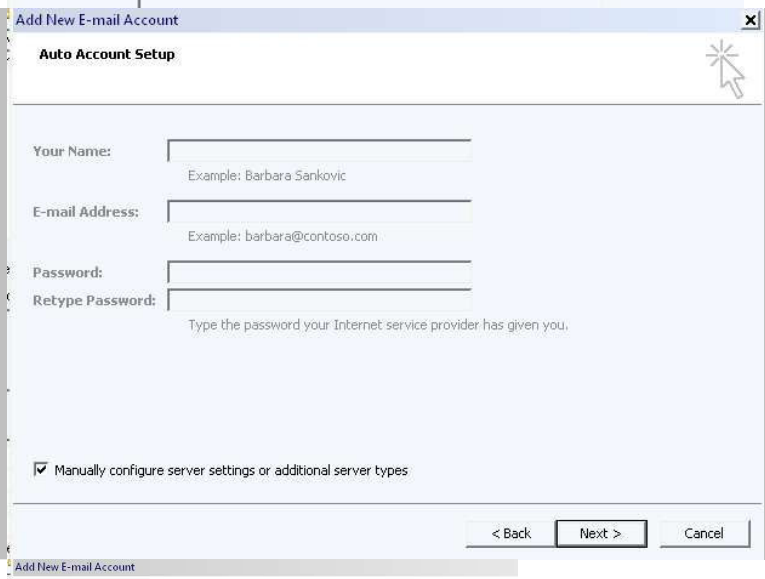
1) On the Email Accounts Screen, **Select Yes, click next.**
   a) If a window asking to Email Upgrade Options appears, select **Do Not Upgrade and Click Next. Proceed to Step #3**

2) Once Outlook is open, click **Tools ➔ Account Settings ➔ Select Email Tab ➔Click New**



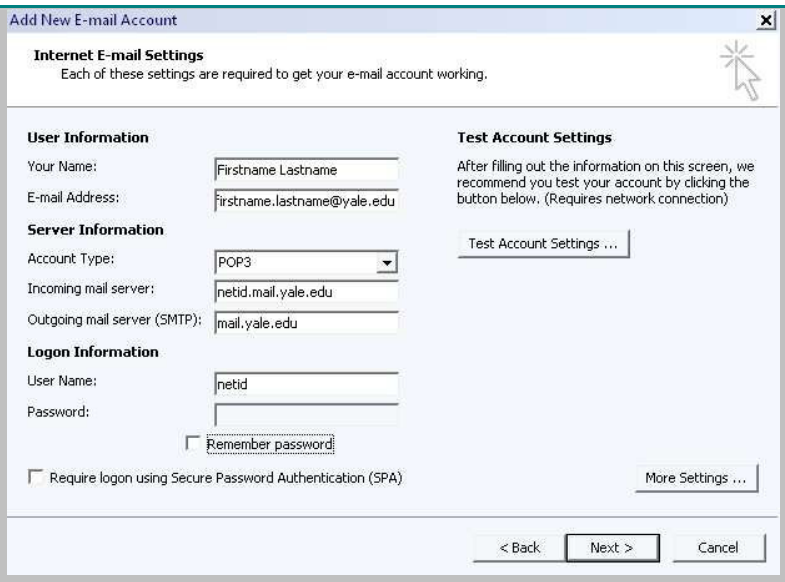
3) **Select Account type**
(Microsoft Exchange, POP3, IMAP, or HTTP will already be selected)
Click Next

4) The Auto Setup Screen will be displayed. **Select** the option at the bottom of the window to **Manually Configure Server Settings…….**

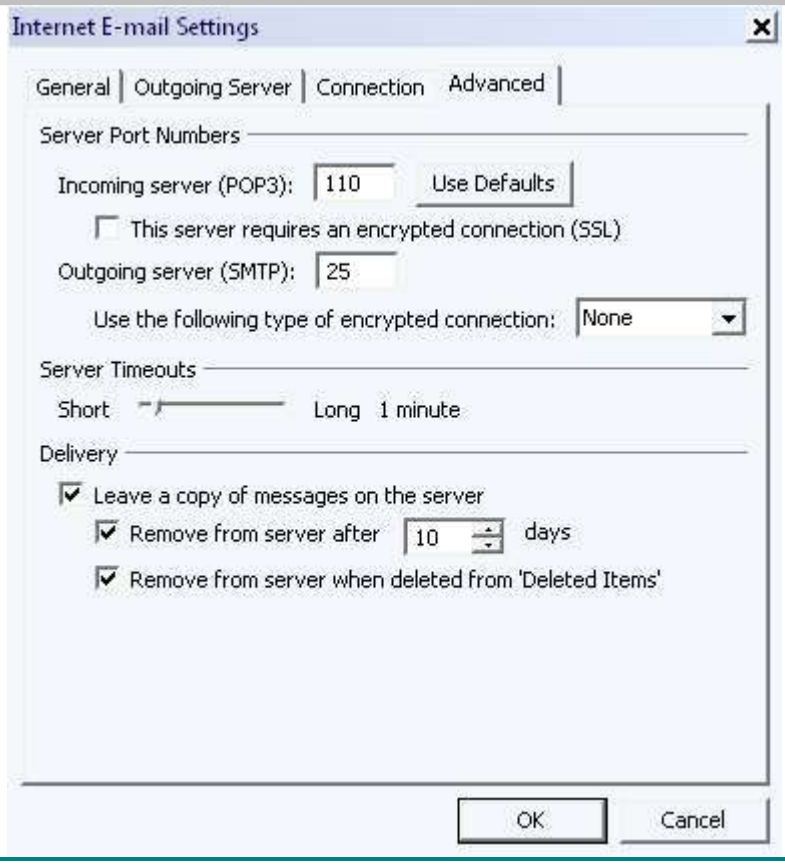


5) On this screen you must select the type of account you wish to configure. For Yale Email Accounts, **Select Internet E-mail click Next**

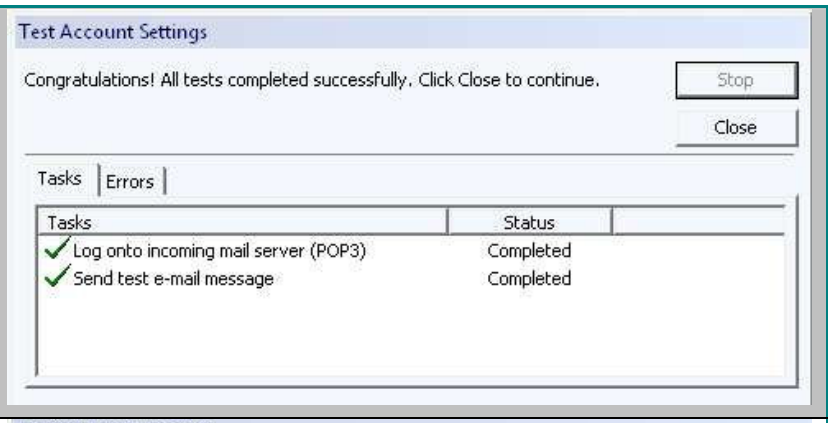
6) Internet Email- Settings
   a) Your Name: **Your name** as you would like it to appear on your emails
   b) Email Address: Yale accounts have the format of **firstname.lastname@yale.edu**
   c) Account type: For Yale Accounts we currently user **Pop3 or IMAP**
   d) Incoming Mail: **netid.mail.yale.edu**
   e) Outgoing Mail server: **mail.yale.edu**
   f) User Name: **Netid**
   g) **Uncheck** Remember Password, Click **More Settings**



7) Additional Configurations
   a) Click the **Advanced Tab**
   b) At the bottom of the Window, **Check Leave a copy of messages on the server**
   c) Choose the number of days to remove from server
   d) Also…..check the box to **remove from server when deleted from Deleted Items**
   e) Click Ok



8) Once you have completed all the settings. You have the option to Test your settings prior to closing the window. Click the Test Account Settings Button. Enter your password @ the prompt. If you get all Green check marks Outlook connected to the server successfully. Click Close.
9) Click Next



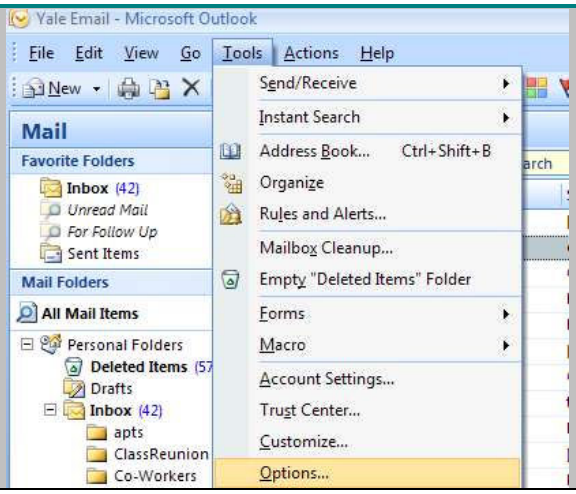
10) Account Configuration Complete.

III: Creating and Customizing Your Outlook Profile

Once you have setup your email account, you can select additional options for viewing email, how contacts are stored, what window is displayed when Outlook is launched, and more.

To become familiar with some of the options:

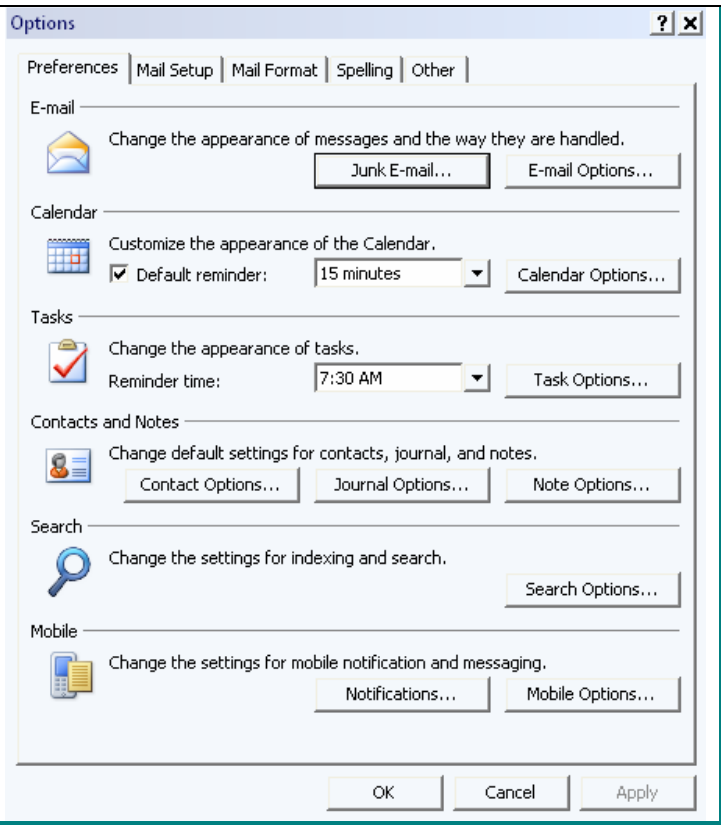
11) Click on the Tools Menu ➔ Select Options



12) At this window you can customize various options for email, contacts, calendaring, and other options.
   a) Junk Email will be discussed in more detail in another session.
   b) Additional Options can be accessed by clicking any of the buttons to the right of the main sections. (I.E. Email ➔ Email Options)

Try It: Change Outlook Startup Folder:

Click on Tools ➔ Select Options ➔ Click on the Other Tab ➔ in the section that says Startup in this Folder, click Browse ➔ choose the area that you want to be displayed when you open Outlook. Click OK to accept changes ➔ Close and Restart Outlook.



IV: Customize Your Outlook Workspace

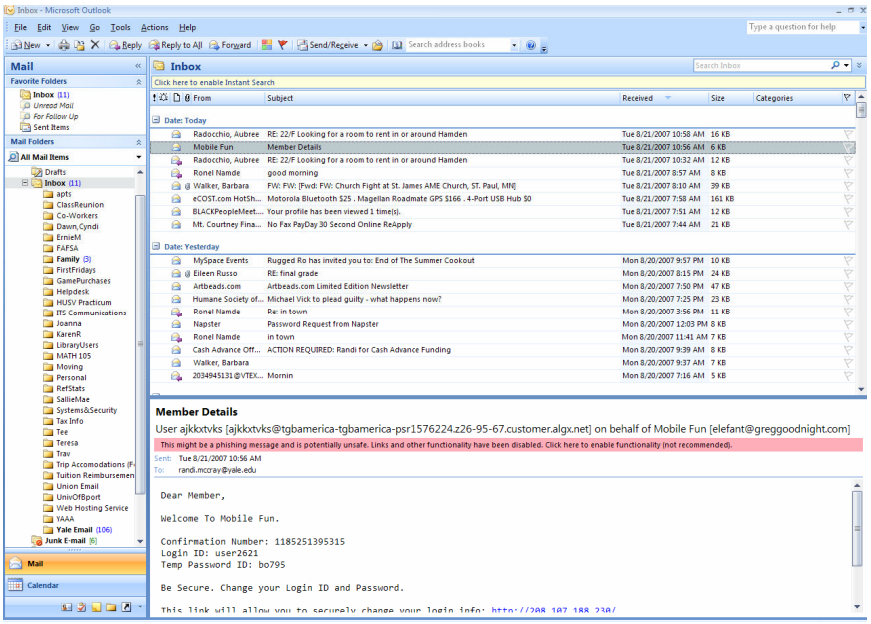
When you launch Outlook before customizing the view, the default view will be like that displayed below. This view can contain too much and be more than the user would like to see when reading their email. In just a view short steps this view can be customized so that each time the user launches Outlook they see a window which is much easier to view.

Left: Navigation Pane,

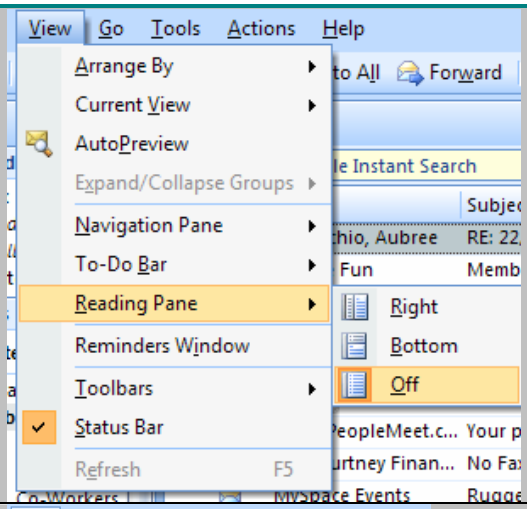
Top: Title Window, Standard Toolbar, and below it is the Shortcut Toolbar.

Right: Messages view, which is Categorized and Grouped by Date

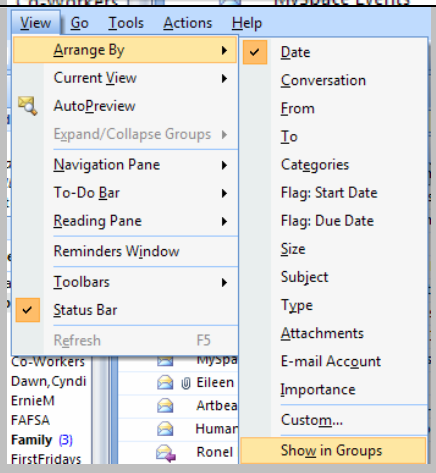
Bottom: shows the selected message in the Preview Pane.



13) Turn Off Reading (Preview) Pane
   a) View ➔ Reading Pane ➔ Off

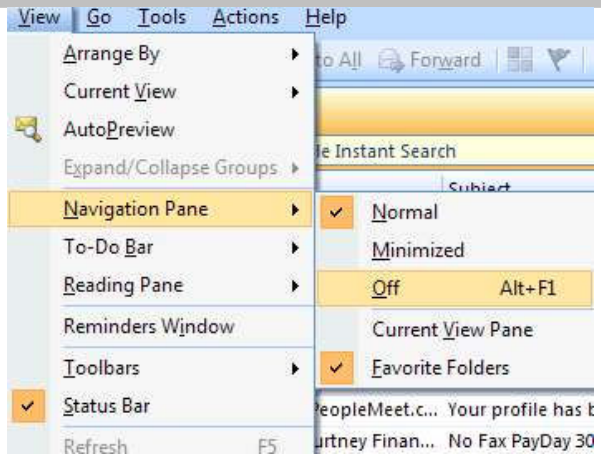


14) Show Messages Ungrouped
   a) View ➔ Arrange By ➔ Uncheck Show in Groups



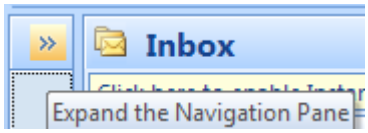
15) The navigation pane is the space that allows users to move between various folders within their email as well to other sections of Outlook (Tasks, Contacts, Calendar). If the navigation Pane is removed, Users will have to use the **Go menu** to navigate to other places in the Outlook Program which will redisplay the Navigation Pane. **Alternatively, user can hide/show Navigation View (shown in Step #16).**

Turn off Navigation Pane: View ➔ Navigation Pane ➔ Off



16) Hide the Navigation Pane

Click the Double Arrows in the top right hand corner of the navigation pane as show in the image on the right. Clicking the Double Arrows again, expands the Navigation Pane

Hide (Minimize) Navigation Pane

Show (Expand) Navigation Pane