

CHAPTER 1

InFocus

WPL_O801

OUTLOOK 2010 BASICS

Outlook 2010 is a time and information management program that helps you to manage your day-to-day tasks and information quickly and effectively.

This chapter covers some of the basic principles and navigation methods to help you get up and running with Outlook 2010 as quickly as possible.

In this session you will:

- ✓ gain an overview of what **Outlook 2010** is used for
- ✓ learn how to start **Outlook**
- ✓ gain an overview of the common **Outlook 2010** screen elements
- ✓ learn how to use the **Ribbon**
- ✓ learn how to use the keytip badges on the ribbon
- ✓ learn how to minimise the ribbon
- ✓ gain an understanding of **Backstage View** in **Microsoft Outlook**
- ✓ learn how to access the **Backstage View**
- ✓ gain an understanding of the **Quick Access Toolbar**
- ✓ learn how to add commands to the **Quick Access Toolbar**
- ✓ learn how to navigate to specific features of **Outlook**
- ✓ learn how to customise the **Navigation** pane
- ✓ learn how to work with the **To-Do Bar** to help manage your time and priorities
- ✓ gain an overview of the **Mail** screen
- ✓ gain an overview of the **Calendar** screen
- ✓ gain an overview of the **Contacts** screen
- ✓ gain an overview of the **Tasks** screen
- ✓ gain an overview of the **Notes** screen
- ✓ gain an overview of the **Outlook Today** screen
- ✓ learn how to close **Outlook**.

UNDERSTANDING OUTLOOK 2010

Microsoft Outlook is designed to help you manage the way that you organise the day-to-day aspects of your business and personal life and the way that you interact with other computer

users. You can use it to communicate with others, to keep track of your appointments and meetings, and to manage the contact details of individuals or businesses.

Key Features of Outlook 2010

Microsoft Outlook is both a **personal information manager** and **electronic messaging system** rolled into one. Outlook can be used to keep track of your diary, hold the contact details of your customers, suppliers and associates, schedule meetings, send messages, and generally keep track of things you have to do.

To do this, Outlook provides you with five main tools. These are **Mail**, **Calendar**, **Contacts**, **Tasks** and **Notes**. These tools work together, as well as independently, to provide you with a useful package known as **Microsoft Office Outlook 2010**.



Mail

The **Mail** tool allows you to manage electronic mail. You use this aspect of Outlook to send messages and to receive them from others. These messages can either be ones sent from within your own organisation (internal email) or externally using the Internet.



Calendar

The **Calendar** tool provides you with an electronic diary which can also be used to schedule and plan meetings with other people connected to your computer system or over the Internet.



Contacts

The **Contacts** tool allows you to manage business and personal contacts by recording the names, addresses, telephone numbers, and email details of people such as colleagues, customers, suppliers, friends, relatives, and the like.



Tasks

The **Tasks** tool provides you with a To-Do list. You can also use it to prioritise tasks and to delegate them to others and track how many of them have been completed.



Notes

The **Notes** tool allows you to type memory jogging notes into your computer so that you can refer to them again later.

There are several other subsidiary tools in Outlook that you may find useful. These include the **Journal** which automatically records actions you choose that relate to specific contacts and places those actions in a timeline view, and **Outlook Today** which allows you to see what messages you have, what you need to do, plus other important information in one handy screen.

How Outlook Is Used

Outlook can be opened and used as required, or it can be left open and operating behind the scenes while you are working with other applications. Generally, it is left open so that new mail and invitations can be received at any time. Outlook can then notify you even if you are working with another application.

Since it is designed to allow you to communicate with other people, Outlook will operate on both your network and Internet connections.

STARTING OUTLOOK

To send an email message or invite staff to a meeting, the first thing that you need to do is to start **Microsoft Outlook**. As a standard software application, how **Microsoft Outlook** is started is

largely determined by Windows. For example, it can be started from the Windows **Start menu** or from a **shortcut** on the desktop or taskbar.

Try This Yourself:

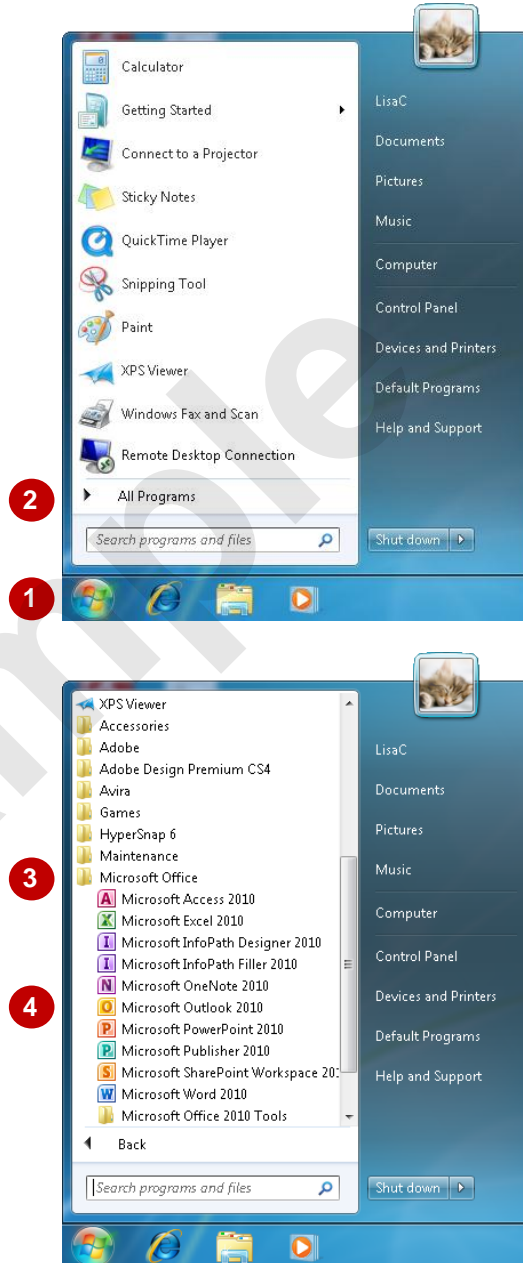
Before you begin, ensure that your computer is switched on and that the Windows desktop is displayed on your screen...

- 1 Click on the Windows **Start** button at the bottom left-hand corner of the screen to display the menu

It's a round button with the Windows logo...

- 2 Click on **All Programs**
- 3 Click on **Microsoft Office**
- 4 Click on **Microsoft Office Outlook 2010**

After a few moments the Inbox in the Mail feature will open in Outlook 2010



For Your Reference...

To **start Microsoft Outlook**:

1. Click on the Windows **Start** button
2. Click on **All Programs**
3. Click on **Microsoft Office**
4. Click on **Microsoft Office Outlook 2010**

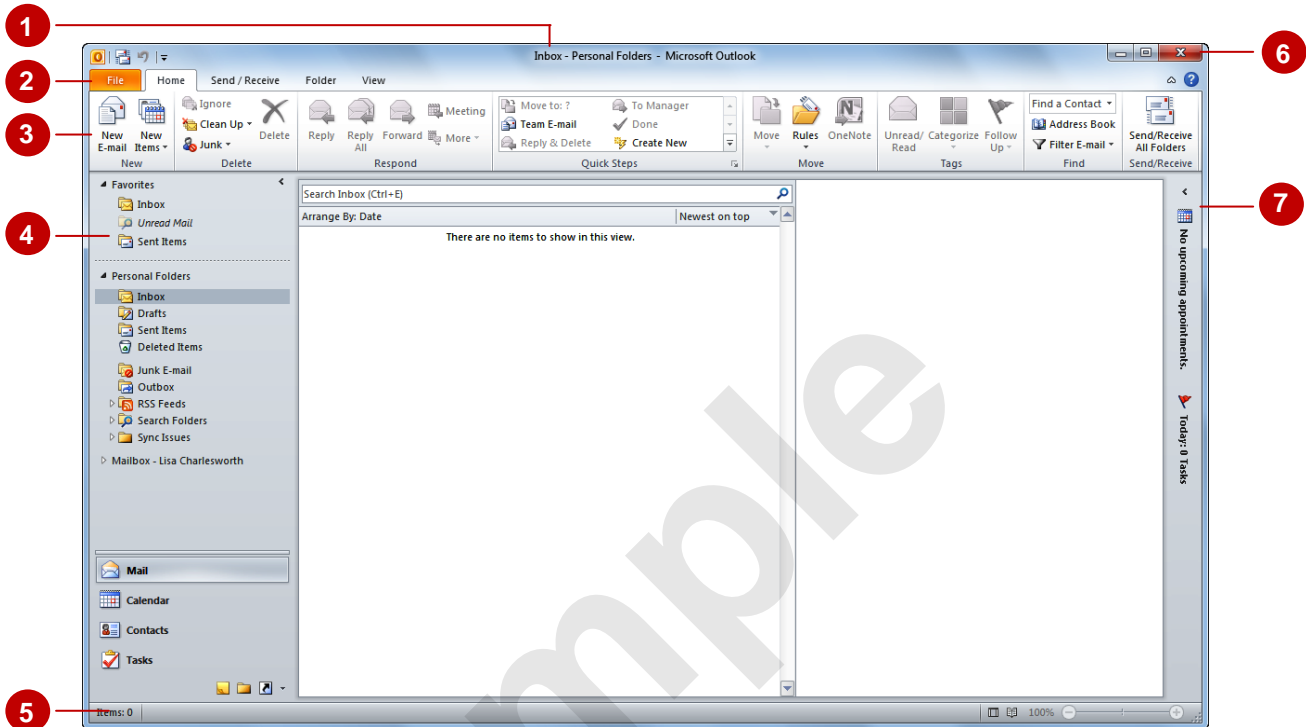
Handy to Know...





- You can also start Outlook by double-clicking on an Outlook **shortcut**.

COMMON OUTLOOK 2010 SCREEN ELEMENTS

Outlook can do so many different things for you and as a consequence its screen is probably the most interesting of all. No two Outlook 2010 screens will ever appear alike because of how

Outlook works, what data it receives, and what functions a person prefers to use regularly. Nevertheless, your screen will have many of the key features that are shown below.



- 1 The **Title bar** displays the name of the feature that you are currently using, followed by 'Microsoft Outlook'.
- 2 The **File** tab is used to access the **Backstage view** which contains settings that are not directly related to creating or managing Outlook items such as Print and Save commands, and account management functions such as opening calendars and importing files. *Outlook Options* are also available so that you can set your working preferences and options for Outlook 2010.
- 3 The **Ribbon** is the tabbed band that appears across the top of the window. It is the control centre of Outlook 2010. Instead of menus, you use the **tabs** on the Ribbon to access the **commands** that have been categorised into **groups**. The commands include **galleries** of formatting options that you can select from, such as the **Quick Steps** gallery shown here.
- 4 The **Navigation pane** provides a quick way of switching between the various Outlook features such as Mail, Calendar, Contacts, and so on.
- 5 The **Status bar** indicates what is going on in Outlook at the present moment. It also changes depending upon the feature you are using and the tool that you are working with.
- 6 The **resizing buttons** allow you to **minimise**  (make smallest), **maximise**  (make largest), **restore down**  (return to the size between minimise and maximise), and **close**  the application window.
- 7 The **To-Do bar** integrates your follow-up messages, tasks and appointments in one central location.

USING THE RIBBON

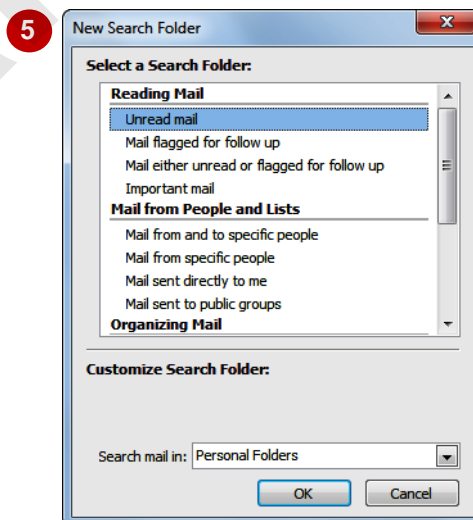
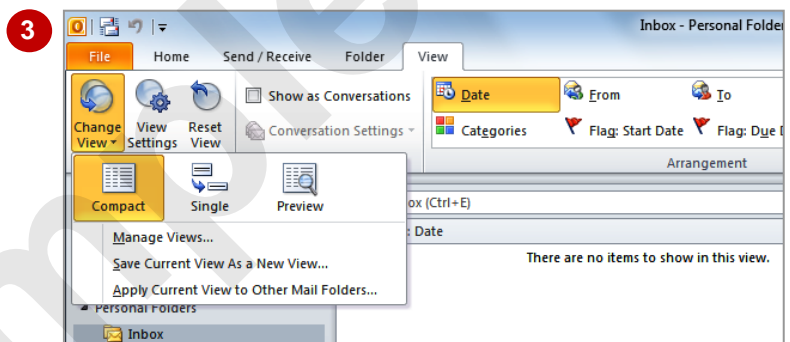
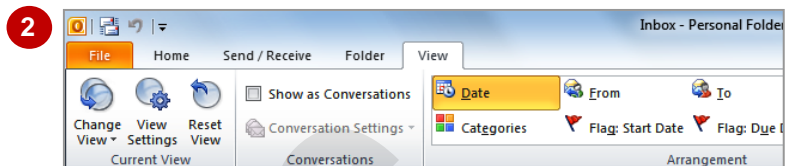
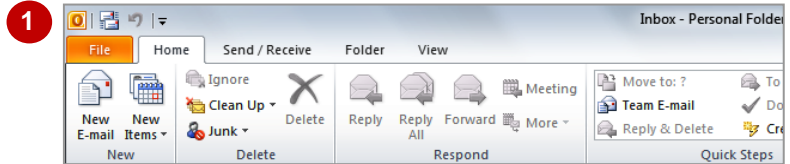
The **Ribbon** is the command centre for Outlook. It provides a series of **commands** organised into **groups** that are placed on relevant **tabs**. Tabs are activated by clicking on their name to display

the command groups. Commands are activated by clicking on a button, tool or gallery option. Everything you could possibly want to do in Outlook will be found somewhere on this Ribbon.

Try This Yourself:

Before starting this exercise ensure Outlook has started...

- 1 Examine the groups on the **Home** tab
These contain the most commonly used commands relevant to the Outlook feature that you are currently using (for example, Inbox in Mail in this case)...
- 2 Click on the **View** tab
The commands on this tab are used to change how the information will display in the window...
- 3 Click on **Change View** in the **Current View** group to display the **View** gallery
This includes three viewing options as well as three menu options at the bottom of the list...
- 4 Click on each of the tabs and examine the commands
Some of these open dialog boxes...
- 5 On the **Folder** tab, click on **New Search Folder** in the **New** group to open the **New Search Folder** dialog box
- 6 Click on **[Cancel]** then click on the **Home** tab



For Your Reference...

To **use** the **Ribbon**:

1. Click on a tab to display the commands
2. Click on a tool to activate a command, display a gallery or display a dialog box

Handy to Know...

- Clicking on some commands will open a new window with its own ribbon and tabs specific to the function. For example, when you click on **New E-mail** in the **New** group on the **Home** tab, a new untitled message window will open complete with tabs and commands relevant to creating a new message.

USING RIBBON KEYTIPS

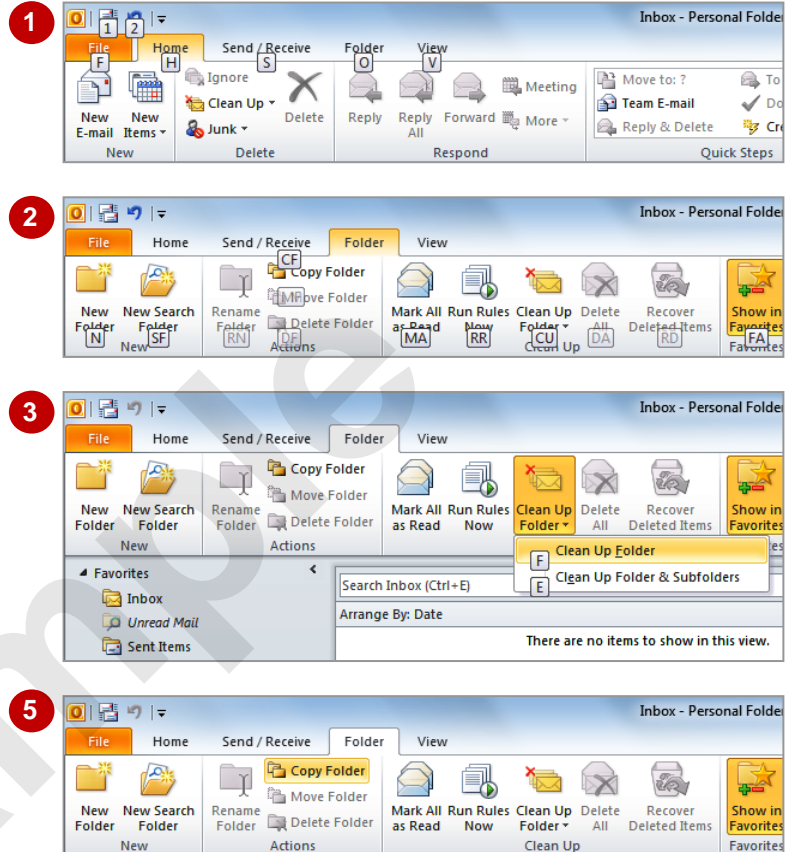
The **Ribbon** is normally accessed with a mouse. However, you can also use the keyboard to access **Ribbon** commands. When you press **Alt**, the letters known as **key tips** or **access keys**,

will appear next to commands on the ribbon. Pressing a key on the keyboard will activate the corresponding command on the **Ribbon** just as if you'd clicked the command with the mouse.

Try This Yourself:

Before starting this exercise ensure Outlook has started...

- 1 Press **Alt** to display the KeyTips
- 2 Press **O** to activate the **Folder** tab and display the keytip for the **Folder** commands
- 3 Press **C** + **U** to display the **Clean Up Folder** options
*You can use the arrow keys **←** and **→** to move through the options or press the specific letter...*
- 4 Press **Esc** twice to return to the previous level of access keys
- 5 Press **Tab** several times to cycle through the commands on the **Folder** tab
- 6 Press **Esc** to return to normal mode



For Your Reference...

To **use KeyTips** to access commands:

1. Press **Alt** to display the **KeyTips**
2. Press the letter key of the command or tab that you want to select
3. Press **Esc** to return to normal mode

Handy to Know...

- You can still use the shortcut keys for menu commands that were available in previous versions of Office. For example, **Ctrl** + **B** applies bold to selected text in an email message.

MINIMISING THE RIBBON

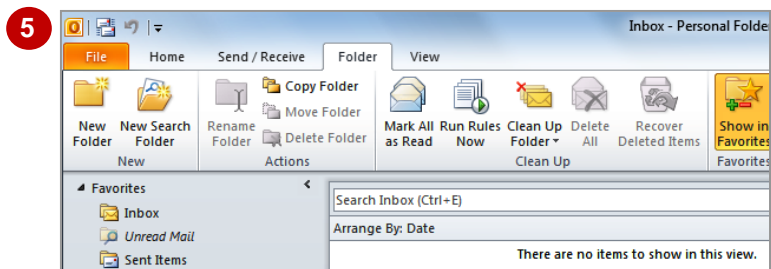
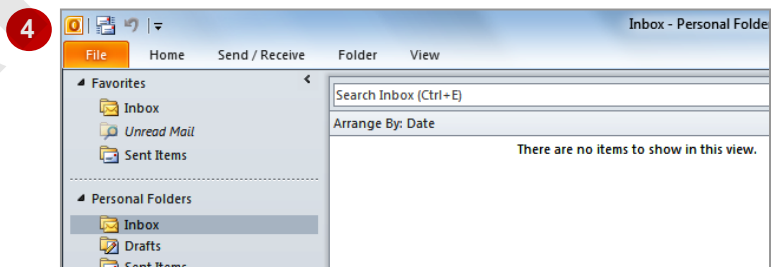
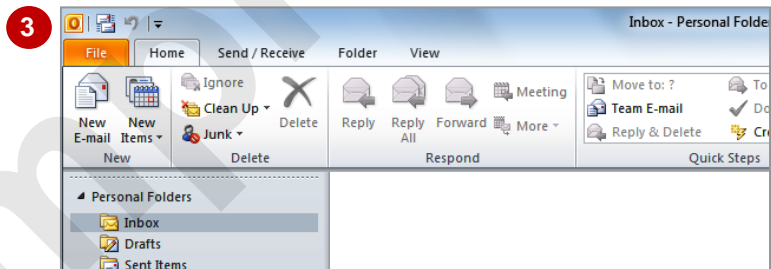
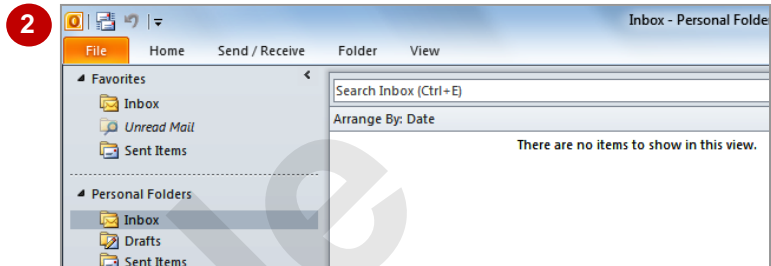
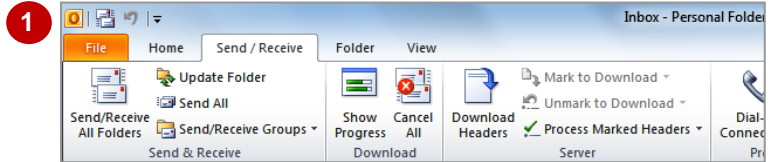
The **Ribbon** at the top of the screen, valuable as it is, does tend to occupy a reasonable amount of space. You can minimise the **Ribbon** so that only the tabs appear visible. You can minimise the

Ribbon as a once-off operation, or have it remain constantly minimised and display full commands only briefly while a tab has been clicked.

Try This Yourself:

Before starting this exercise ensure Outlook has started...

- 1 Click on the **Send / Receive** tab to display the **Send and Receive** commands
- 2 Double-click on the **Send / Receive** tab to minimise the ribbon
While the tabs stay visible, the rest of the commands are hidden...
- 3 Click on the **Home** tab to redisplay the ribbon, this time with the **Home** commands
- 4 Click back in the window
The ribbon will hide again – it only becomes visible when you need it. You can redisplay it permanently though...
- 5 Double-click on the **Folder** tab to redisplay the **Ribbon** permanently
- 6 Click on the **Home** tab



For Your Reference...

To **hide/display** the **Ribbon**:

1. Double-click on the active tab to hide the **Ribbon**
2. Click on a tab to see the **Ribbon** temporarily
3. Double-click on a tab to redisplay the **Ribbon** permanently

Handy to Know...

- You can also minimise the **Ribbon** by clicking on **Minimise the Ribbon** and then maximise it again by clicking on **Expand the Ribbon**. These buttons are located at the right end of the **Ribbon**.

UNDERSTANDING THE BACKSTAGE VIEW

The **Ribbon** lets you work directly on or with an Outlook item – you can create an email, format it, send it, and much more. The **Backstage view**, which is accessed using the **File** tab, provides

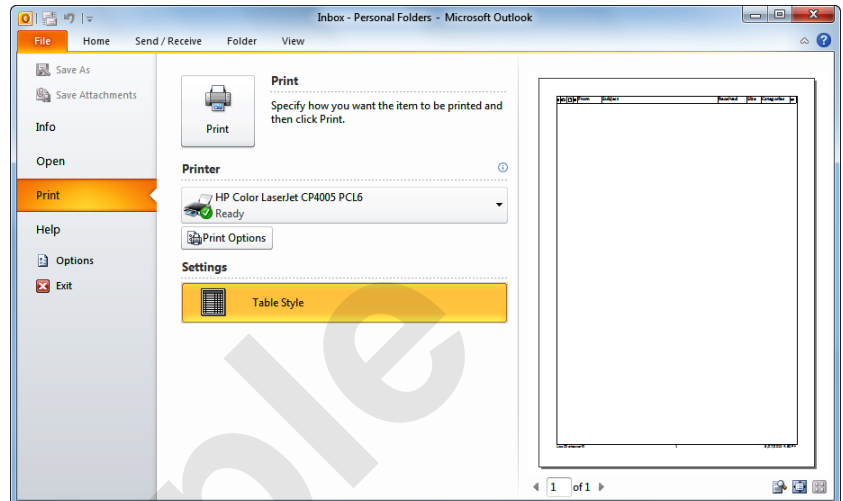
commands that are not directly related to creating or managing an Outlook item. For example, you can access account details, clean your mailbox, save attachments and configure other settings.

The Backstage View

The **File** tab on the **Ribbon** is not a normal tab – as you can tell by the fact that it is coloured. Clicking on the **File** tab launches a mini-program within Microsoft Outlook known as **Backstage View**. **Backstage**, as it's known for short, occupies the entire screen although the tabs from the **Ribbon** still remain visible across the top.





At the left of the **Backstage** is a navigation pane which is made up of **Quick commands**, smallish buttons that will perform an operation immediately, and largish **tabs**, which display more options and information to the right of the screen.

The underlying purpose of the **Backstage** is to make it easier to manage your accounts and customise Outlook.







Quick Commands

The **Quick commands** provide immediate access to an operation.

 Save As	Allows you to save the current Outlook item under a different name or location
 Save Attachments	Allows you to save all attachments in a selected email message
 Options	Provides access to options that allow you to control how Outlook appears and works
 Exit	Allows you to close and exit Microsoft Outlook

Backstage Tabs

The **Backstage tabs** provide more options for working with a document

 Info	Lets you modify account settings, clean your mailbox, and create and manage rules and alerts
 Open	Lets you open a previously saved calendar or data file, and import and export files
 Print	Lets you preview and print the current Outlook item
 Help	Provides access to Microsoft's help network and also provides licensing information about your software

ACCESSING THE BACKSTAGE VIEW

Many Outlook settings that are not directly related to creating or managing Outlook items, such as **Print** and account management options, are placed in the **Backstage view**. You usually

access the **Backstage** by clicking on the **File** tab to the left of the **Ribbon**, but it can also open when you select specific commands such as the keyboard shortcut for **Print** (**Ctrl** + **P**).

Try This Yourself:

Before starting this exercise ensure Outlook has started...

1 Click on the **File** tab on the **Ribbon** to display the **Backstage view**, then click on the **Info** tab if it is not already selected

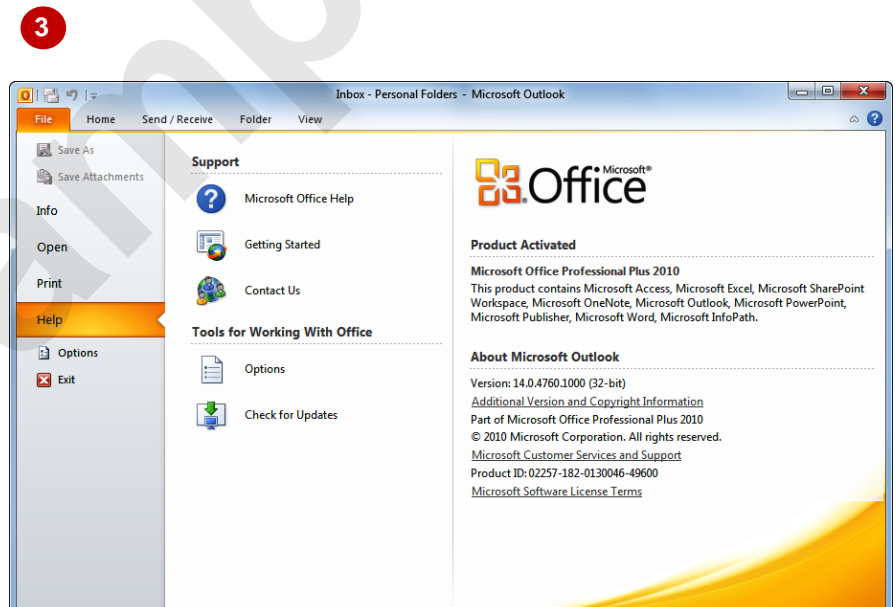
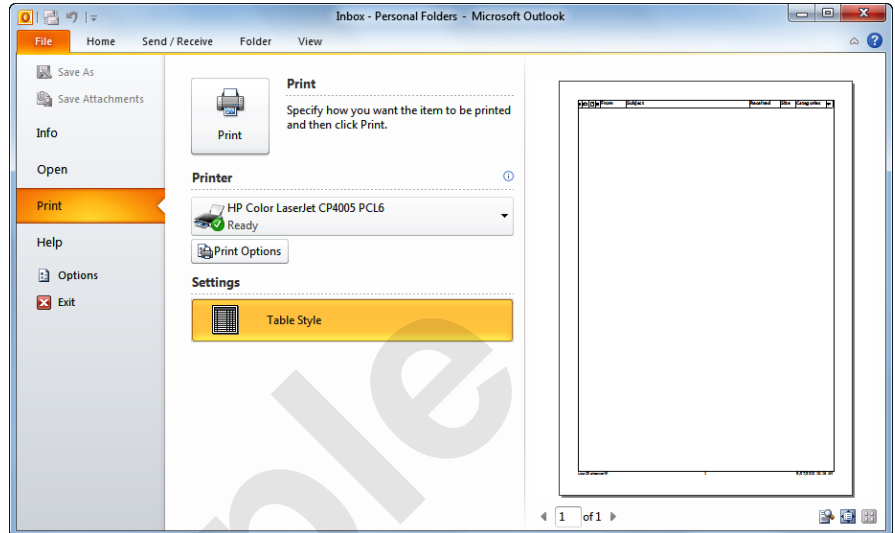
2 Spend a few moments studying the types of commands that are available

3 Click on the **Print** tab (at the left) to see the printing options

A preview of how the item will print will appear to the right...

4 Click on the **Help** tab (on the left) to see the help options and also product licensing information

5 Click on the **Home** tab of the **Ribbon** to close **Backstage view** and return to the Inbox



For Your Reference...

To access the **Backstage view**:

1. Click on the **File** tab on the **Ribbon**
2. Click on the desired tab or **quick command** at the left

Handy to Know...

- You can also close the **Backstage view** by pressing **Esc**.

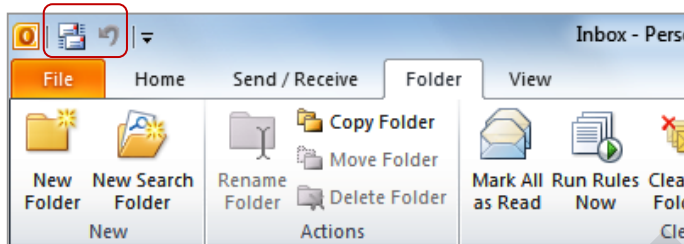
UNDERSTANDING THE QUICK ACCESS TOOLBAR

The **Quick Access Toolbar**, also known as the **QAT**, is a small toolbar that appears at the top left corner of the Outlook window. It is designed to provide access to the command tools you use

most frequently, such as **Send/Receive All Folders** and **Undo**. You can add buttons to the **Quick Access Toolbar** to make finding your favourite commands easier.

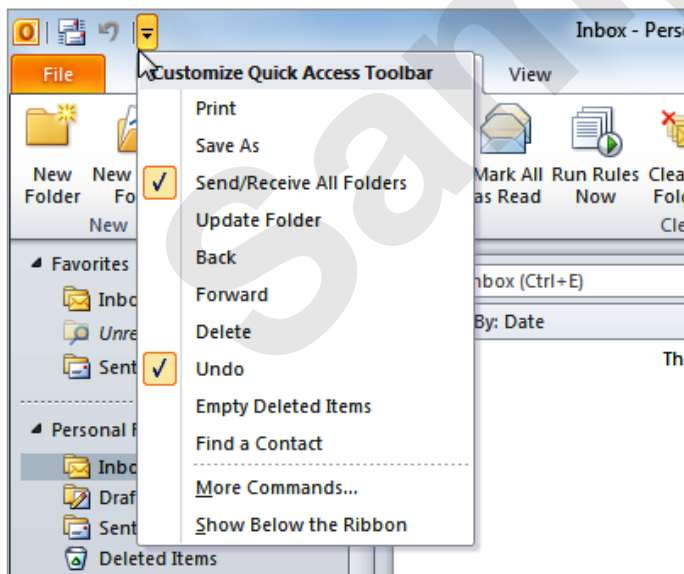
The Quick Access Toolbar

The **Quick Access Toolbar** is positioned at the top left corner of the Microsoft Outlook 2010 screen. In its default state, it includes the **Send/Receive All Folders** tool and the **Undo** tool.



Customising the Quick Access Toolbar

Appearing immediately to the right of the **Quick Access Toolbar**, the **Customise Quick Access Toolbar** tool displays a list of commonly used commands that you can add to the toolbar. You can select the items that you want to add. The ticks that appear to the left of the menu options show you that an option is already displayed.



ADDING COMMANDS TO THE QAT

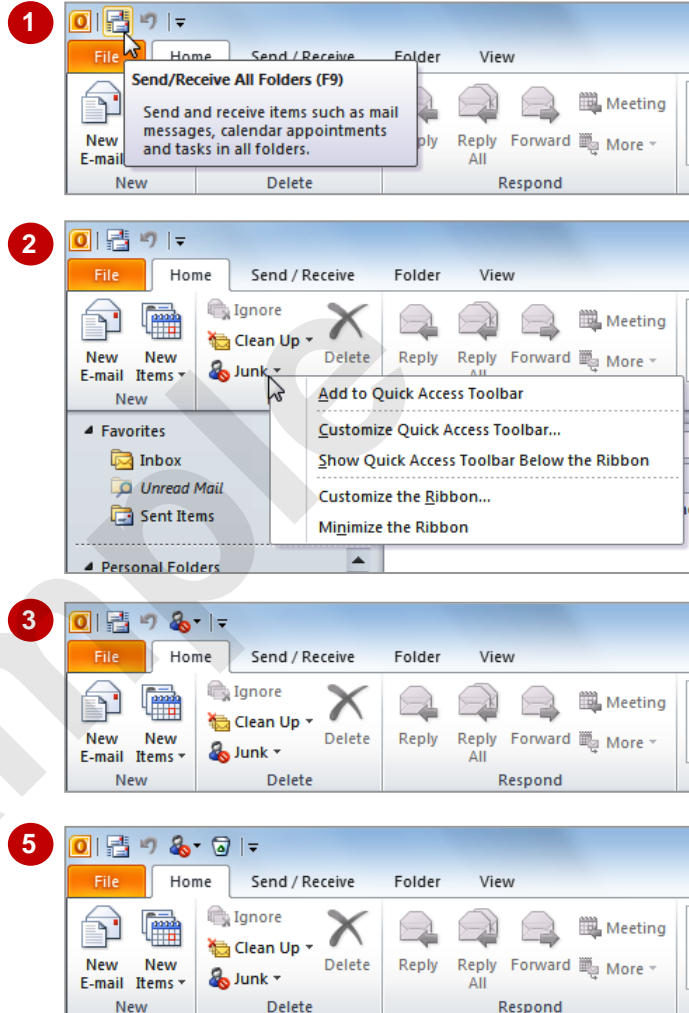
The **Quick Access Toolbar** is a handy location to place commands from the **Ribbon** that you use most frequently. Adding commands from the **Ribbon** involves locating the command, right-

clicking on it and choosing the **Add to Quick Access Toolbar** option from the short cut menu that appears.

Try This Yourself:

Before starting this exercise ensure Outlook has started...

- 1 Point to the first button on the **Quick Access Toolbar** to see the name of the tool and its shortcut
In this case, it is Send/Receive All Folders...
- 2 Right-click on **Junk** which appears in the **Delete** group on the **Home** tab to display a shortcut menu
- 3 Select **Add to Quick Access Toolbar** to add the **Junk** tool to the **QAT**
- 4 Click on the **Customise Quick Access Toolbar** tool to display a menu
- 5 Select **Empty Deleted Items** to add this tool to the **QAT**
It is just as easy to remove tools you don't want from the QAT...
- 6 Right-click on **Junk** and select **Remove from Quick Access Toolbar**
- 7 Repeat step 6 to remove **Empty Deleted Items** from the **QAT**



For Your Reference...

To **customise** the **Quick Access Toolbar**:

1. Right-click on the command you want to add and select **Add to Quick Access Toolbar**
Or
Click on the **Customise Quick Access Toolbar** tool and select a command

Handy to Know...

- You can move the **QAT** under the ribbon by clicking on the **Customise Quick Access Toolbar** tool and selecting **Show Below the Ribbon**. This puts the tools that you use most frequently closer to your Outlook item making it quicker to access them.


NAVIGATING TO OUTLOOK FEATURES

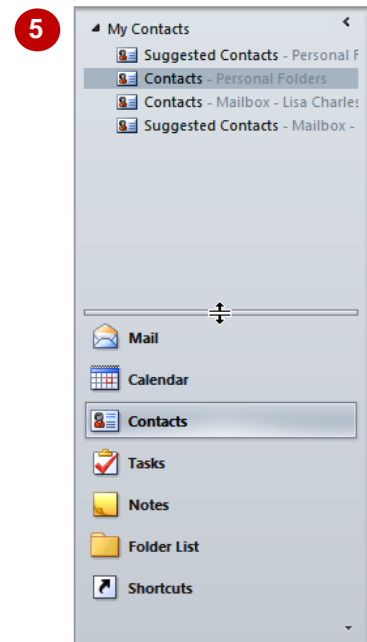
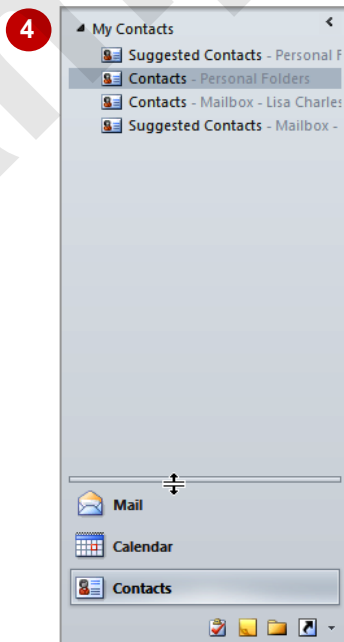
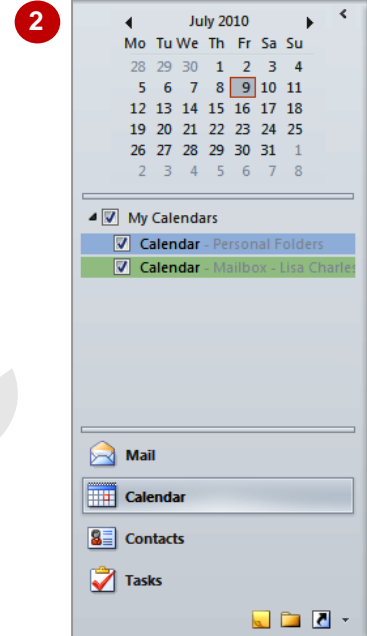
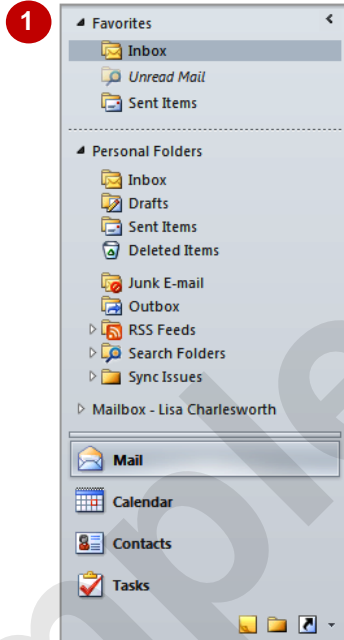
You use the **Navigation** pane to navigate to the various features in Outlook. The **Navigation** pane, which appears to the left of the screen, normally displays a folder list and a series of

buttons that provide access to the various Outlook features. The **Navigation** pane can be displayed or hidden from view, and it can be resized to display larger or smaller buttons

Try This Yourself:


Before starting this exercise ensure Outlook has started...

- 1 Click on the **View** tab, then click on **Navigation Pane**  in the **Layout** group and select **Normal** to display the **Navigation** pane
The Mail feature is currently open in the examples and its button, which is located towards the bottom of the Navigation pane, will appear highlighted...
- 2 Click on **[Calendar]** in the **Navigation** pane to open the **Calendar** feature
- 3 Click on **[Contacts]** in the **Navigation** pane to open the **Contacts** feature
- 4 Hover over the narrow grey box in the **Navigation** pane (as shown), press and hold down the mouse button, then drag down until only the **Mail**, **Calendar** and **Contacts** buttons are visible in the **Navigation** pane
- 5 Repeat step 4 to drag the grey box up until all seven buttons are visible, as shown
- 6 Click on **[Mail]** to display the **Mail** feature




For Your Reference...

To **navigate** to Outlook **features**:

1. From the **View** tab, click on **Navigation Pane**  in the **Layout** group and select **Normal** to display the **Navigation** pane
2. Click on the desired button to display the feature

Handy to Know...

- You can use the **Navigation Pane Options** dialog box to turn folders on or off in the **Navigation** pane. To display this dialog box, click on **Configure buttons** , which is located in the bottom right corner of the **Navigation** pane and select **Navigation Pane Options**.