

# MICROSOFT OUTLOOK 2010

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## What Is Outlook?

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Outlook is an integrated “Desktop Information Management Program” that allows you to organize and share different types of information on your desktop and to communicate with others.

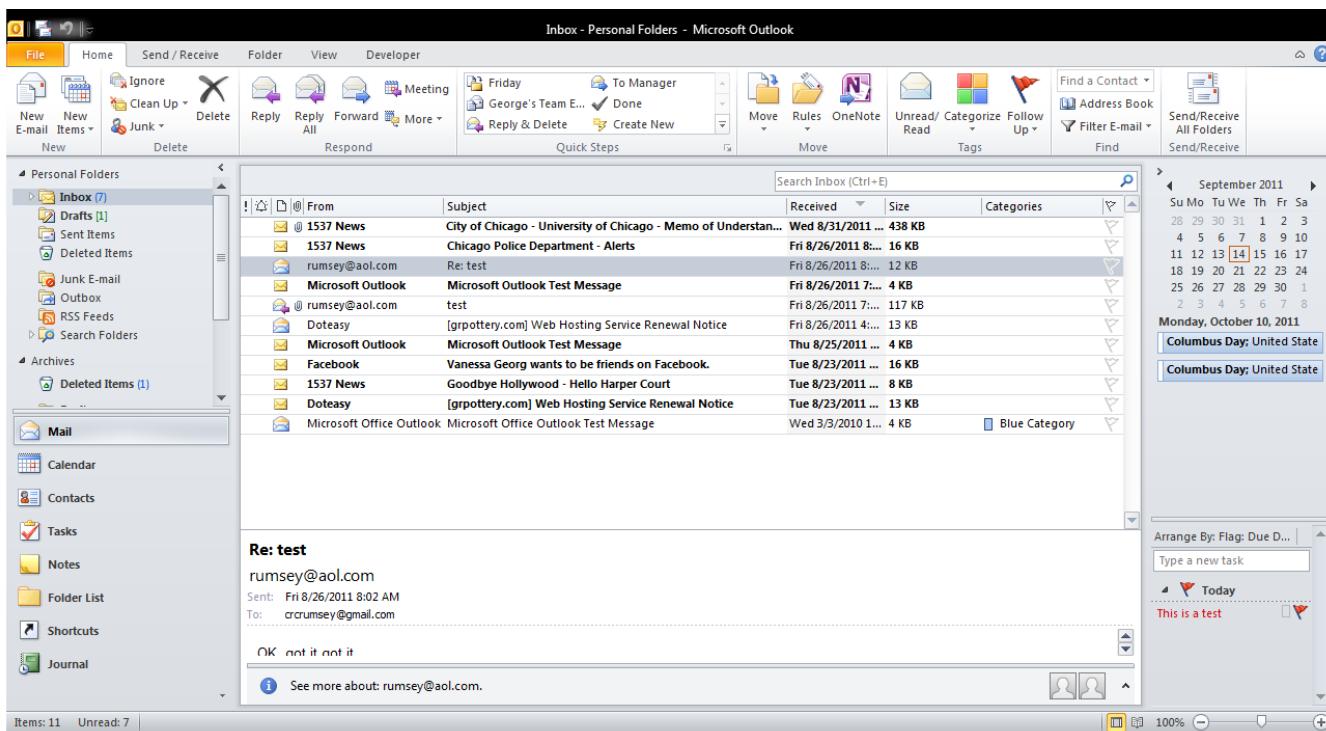
Outlook allows you to manage your information such as:

- E-mail
- Calendar (meetings and appointments)
- Contacts (address book)
- Tasks (to-do list)
- Notes (sticky notes for the screen)

- Folder List (all Outlook folders)
- Shortcuts
- Journal

Across a network, you can distribute information using e-mail, group scheduling, and shared folders and calendars.

All of these items are accessed through the navigation pane at the left of the screen. Click each button at the bottom left to switch to that view. (Note the dropdown in the lower right corner, with options to add or remove choices. There is also a collapse or expand arrow in the upper right corner.)



### Sample Outlook Screen

## Folders

To Outlook, folders are where you store Outlook items, such as email, appointments, and tasks. If you are in your Inbox, then a folder becomes an organizational device for storing your emails.

Email folders are usually separated into your profile folders and your personal folders. The top folder exists on the network server (i.e., also available at the online web client), whereas personal folders reside on your computer.

You may also see local “archive folders,” where items are stored after 60 days.

Within the main levels are several important sub-folders, including:

- Inbox—Received mail.
- Drafts—Items not yet ready to send.
- Sent Items—Items that have been sent.
- Deleted Items—Items you delete (kept until you empty the trash).
- Junk email—Outlook’s spam box.
- Outbox—Items scheduled for delivery at a later time.

- RSS Feeds—“Really Simple Syndication” news feeds (which you must subscribe to).
- Search Folders—Special folders that can be customized to show frequently searched items.

You can easily make additional folders by using the “Folder” tab on the ribbon (toolbar) at top. On the Folder tab is the command to make new folders, new search folders, delete folders, copy folders, and clean up folders.

Note: What a folder *does* is determined by which Outlook section you are in. If you are in Calendar, “new folder” means “new calendar.” If you are in Contacts, “new folder” creates a new address book.

## Inbox

In the “Mail” navigation pane is a list of mail folders. The “Inbox” is where your mail appears; it provides a listing of email message that you have received. The Inbox also describes the status of that message: Who is it from? What is its subject? Was it read or not? Is there an attachment? What is its priority?

You can click each category heading to sort your email by that function.

The appearance of the Inbox is controlled under the “View” tab, where you will find several useful viewing options:

- **Change View**—Compact, single, preview.
- **Show as Conversation**—Show email and responses as a “thread.”
- **Arrangement**—Sort by date, categories, from, to, flat, etc.
- **Navigation Pane**—Show or hide the left navigation pane.
- **Reading Pane**—Splits your screen in half (horizontally or vertically), and shows you the content of your message without having to open the message (Options lets you specific whether or not to mark as “read”).
- **To-Do Bar**—Show the task pane and calendar on the right.
- **Auto Preview**—Shows you the content of your message below the sender line (rather than in a separate pane).

The Inbox is also where you can compose and send new mail.

### Reading Your Mail

Neither of the preview options shows you the full content of your email. You *must* OPEN your email to see the details about attachments, priorities, voting buttons, and flags. To open an email message, double-click it with your mouse; alternatively, click once on the message, then go to the menu for File/Open/Selected Item, or right-click on the message and select “open.”

When a message opens, you will have tools across the top, under a tab called “Message”:

- Ignore—Delete (message *and* conversation).
- Junk—Move to Junk folder.
- Delete—Delete just the message.
- Reply—Reply to sender only.
- Reply to All—Reply to sender and other recipients.
- Forward—Send to another person.

- Meeting—Create a calendar meeting.
- More—Other options.
- Quick Steps—Frequently used commands, which can be stored (macros).
- Move—Put message in a specified folder.
- Rules—Establish an “action” to always be applied in relation to this message or sender.
- OneNote—Send message to Microsoft OneNote.
- Actions—Edit message, re-send, other options.
- Tag—As unread, categorize, or for follow-up.
- Editing—Translate, Find.
- Zoom—Enlarge or shrink (readability).

There is also a “File” tab, with features such as move, resend, and print. (And don’t overlook the “Quick Access” toolbar at the top left corner, with the dropdown to add frequently used commands, such as “Print.”)

Also at the top will be any notations about tracking, receipts, urgency, sensitivity, and voting buttons. Just below the subject line will be any attachments. Double-clicking the attachment launches the file, usually with a warning that the file might be unsafe; click “Enable Editing” if you want to work on the document. (Note: Be very careful about opening or saving attachments; this is the primary way viruses are transmitted. Never open an attachment from strangers.)

### Replies to Mail

If you click Reply, you get a new screen that allows you to type in a response and send. You also have toolbar buttons across the top for making new attachments, changing priority, flagging, etc. Notice that the original message is repeated (if you don’t wish to do this, you can turn it off under Outlook’s File/Options/ Mail Options menu).

### Composing New Mail

To create a new email, go to the Home tab. There you can click on the New E-Mail button or click the pull-down button for New Items and select Mail Message. You can also double-click the blank area of the Inbox screen (*not* on a message); or you can

right-click the window and select New Message. Take your pick!

## Writing Your Message

Below the buttons are lines for writing address and subject. Note that both "To" and "Cc" can be clicked to pull up the address book. You can also add "From" and "Bcc" by clicking on "Options."

If you are working on an email but don't have time to finish it, you can save it for future use by clicking File/Save. This step puts it in the "Drafts" mailbox, so you can re-open and continue working on it.

In the "Untitled Message" window that appears, you will find the following "Message" sections:

- Clipboard—Cut and paste functions.
- Basic Text—formatting.
- Names—Addresses from your global and personal address books, along with a "check names" command for manually entered addresses.
- Include—Attach a file, an Outlook item (such as a calendar or business card), or a signature.
- Tags—Mark your messages with indicators of importance.

On the "Insert" tab are options to insert attachments and Outlook items, tables, illustration (pictures and charts), links, text (such as Date & Time), and symbols (such as horizontal lines).

On the "Options" tab are Themes, Show Fields (such as BCC), Voting Buttons, Read and Delivery Receipts, and More Options (such as Delay Delivery and Direct Replies to).

The "Format" tab gives you extended Word formatting capabilities (such as Styles). The "Review" tab has the Spell Check and Thesaurus. And the "File" tab has "Save" and "Move" options.

## Formatting Your Message

On the "Format" tab, you will find a very important option called "Format" There are three choices:

- HTML—Web format, allowing the greatest use of graphics, colors, etc. Also the "largest" format size, and most susceptible to viruses.
- Plain Text—Pure ASCII (keyboard characters), no formatting. Safest and smallest (but most boring).
- Rich Text—Microsoft formatting (still susceptible to viruses).

Formatting options are determined by which of these email formats you have chosen.

There are also choices to create or pick a stationery (letterhead) and to create signatures. (See Options.)

Remember that email formatting often does not transfer across the Internet. It *will* work within your own network.

## Tips to Remember

- The Inbox is where you go to send new mail as well as to read mail.
- You can click on the **To** button to pull up your address book and see other options (such as "Blind carbon copy").
- To save email attachments, click **File** and **Save Attachments**, then click **Save**.
- On the **View** menu is a choice called "Arrange by," useful for sorting your mail. One very popular feature is "show in groups," which will organize your email by sender, date, topics, etc.

## Find

On the Inbox toolbar is a command called "Search Inbox (Ctrl+E)." When you click in this box, a new tab appears at the top of the screen called "Search." It gives you choices to search all folders (not just current folder) or all Outlook items, from, subject, has attachment, date, and other properties.

## Contacts

The contact management program records a wide variety of information about people or companies or organizations—not just email addresses.

- Address books can be viewed in multiple ways by clicking the dropdown in the "Current View"

- section. Views include address cards, business cards, phone lists, categories, and others.
- Click the **New Contact** button to create a new entry in your personal address book, or double-click the white space. Fill out the appropriate fields, then click the **Save and Close** button.
  - Under **Show** at the top of the new entry, you will find options to add additional fields that do not otherwise appear (such as children's names). These can be used to sort your contact list. One very useful "Show" option is "activities," which will list every reference to this person in your Outlook (all emails, appointments, tasks, etc., will be shown on one screen).
  - File/New Folder** (on the Outlook menu) allows you to create additional address books, independent of the built-in address book. Then, when composing mail messages, you can use the pull-down on the "Contacts" button to select from your additional address books.

### Distribution Lists

On the "Home" tab is an additional useful option called "New Contact Group." This creates a distribution list, storing a group of email addresses under one name, so that your email can be addressed to the one name, but sent to the entire list.

The distribution lists has two ways to "Add Members." They can be added from an Outlook contacts or address book, or they can be manually entered as "New Email Contacts" (and not stored otherwise as separate entries in the contacts).

### Business Cards

One way of "viewing" your contacts is as business cards. When composing an email you also have an option to "attach" business cards. This is an easy way to send someone an Outlook Contacts entry, which they can save in their own address book.

Many people now have personal Outlook business cards, which they attach as part of their email signature. That way, when I receive your email, I can double-click your business card attachment, click "Save," and you are added to my address book without my having to do any typing.

### Tips to Remember

- Right-click any email address in a message to quickly create an entry in your contacts.
- If you use categories, you can view your email by category, and then click the "Email" envelope button to email everyone in that category.

## Calendar

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This organizing tool allows you to schedule every imaginable activity—repeat activities, mark blocks of time, set alarms and reminders, etc. Outlook separates calendar events into two categories:

- Appointments** (one person)—Shows on your calendar.
- Meetings** (multiple persons, and perhaps resources, such as a room)—Shows on others' calendars, includes an email invitation with voting buttons to accept or decline, and allows you to check others' schedules for availability.

Calendars can be viewed in multiple ways by clicking the *buttons on the toolbar* at the top. Views include today, next 7 days, 1 day, work week, 7-day week, and month.

### Appointments

When you create a calendar appointment, you get a series of "Calendar Tools." These include options to switch to a meeting (Scheduling/Invite Attendees), options for how it displays on others screens (busy, out of office, free), reminders, recurrence (put it on your calendar more than once), categories (color codes), and more.

- To set appointments, double-click the time you want the appointment to occur. Alternatively, click, hold, and drag to select a block of time, then start typing (while the block is blue) to insert an appointment. Click, hold, and drag the border of an appointment to make it span more time. Double-click the border to see the options for an appointment (such as reminders or color labels).
- If you want to set two appointments for the same time, click the time in the left margin,

then start typing! A second entry is created for the same time period.

- Click a day in the navigation pane's calendar to see the appointments for that day. Use the arrows at either end of the month to see additional months. Stretch the navigation pane wider if you want to see more months.
- Select **Invite Attendees** (when you double-click a time) to request a meeting with other people and book it on their calendar; use "Scheduling" to see others' calendars.
- Use **Recurrence** if you want this meeting to be repeated at additional times on your calendar (such as a monthly staff meeting).
- One very important tool under the "Tags" options looks like a lock, for "Privacy." Even if you share your calendar with others, appointments marked "private" cannot be read, viewed, or edited by anyone other than you.

Right-clicking the hours (left side of the calendar) allows you to select time increments (from 5 minutes to 60 minutes) for display.

Under File/Print are your options to print the different calendars: daily, weekly, monthly, and many more formats to select from.

In the center of the left navigation pane is a window that shows "My Calendars" (use File/New if you want to create multiple calendars). By right-clicking the icon for a calendar, you can set its "properties." One of the properties is called "sharing." This allows you to give other people permission to read and/or edit your calendar from their own computer.

On the View menu of the calendar is the option to show your "task pad," reflecting items on your task list.

## Meetings

Meetings have the same options as appointments, except they need to be "Scheduled." There is a "scheduling" button, which allows you to select the people you wish to invite, review their calendars to find an available time, then send the invitation.

People who receive meeting invitations need to watch for the "Voting Buttons" in the email as the appropriate way to respond. Accepting or declining a meeting marks it on all calendars for those who are invited. If you just reply (rather than "vote") this will not happen.

Many organizations that use Outlook have added rooms and other resources (cell phones, video cams, sound systems) to the Outlook address book, so that you can "invite a room" to a meeting as a way to reserve the room.

## Tips to Remember

- Calendar defaults are located under File/Options. This is where you will find your time schedule and the "Add Holidays" command.
- Emails can be dragged from your Inbox to the Calendar, to create an appointment or meeting.
- If you share calendars, when you display them side-by-side on your screen, click the arrow on the tab to see a merged view.
- If you share many calendars, use "Calendar Groups" to keep them organized.

## Tasks

The Tasks icon organizes a to-do list, as well as prioritizes tasks.

- Create list of work to be done, to be sorted by due date, category, or percent completed. Double click any entry to edit or delete, or delete by dragging to trash.
- Entries on the task list also appear on the daily calendar, where you can mark them completed.
- Use the "Current View" section on the "Home" tab to see detailed versus simple lists.

## Tips to Remember

- Tasks can be assigned. When you create a new task, there is a button for "Assign Task," which sends it to another user's Outlook. They can then send you "Status Reports."

## Notes

On-screen messages, similar to "post-it" or sticky notes.

## Folder List

Pulls up a list of all folders (all icons) you have access to in Outlook.

## Shortcuts

Create your own list of icons (as opposed to the Folder List). When in the "Shortcut" view, use the Folder tab on the ribbon, where you will find a button for "New Shortcut."

## Journal

Tracks the history of any Microsoft Office activity on your computer, over time. When you click on the journal, it gives you activation options, such as what do you want to include in your journal log? Check the boxes for activities you want it to track (such as Word or Excel).

It is not easy to turn off the Journal, should you decide you no longer want to use it.

## Quick Steps

"Quick Steps" are like macros—they store frequently repeated commands, such as "move to a folder" or "forward to a certain person."

When you click the dropdown for Quick Steps, you find a few generic commands (which can be edited), or the command to create "New" steps, with common instructions, such as move a message, categorize, flag, start a new email, forward a message, create a new meeting, or custom.

## Rules

Rules are the Outlook answer to junk mail or spam. Select the "New Rule" button on the Home tab to create a rule. The purpose of a rule is to filter or channel your email to the appropriate folder or box or person.

When you click "Create Rule," you get some frequently used options. Use the "Advanced" button to find the rule wizard, which walks you through the process. You can pick from the built-in (template) rules or start from a blank rule.

Step 1 of a blank rule is to select the "conditions" you are looking for in a message (such as from, subject, specific words, etc.).

Step 2 is to "Edit" the rule description, by clicking the underlined value. If you creating a rule based on a word in the subject or body (for example), you click the blue underlined text in order to specify the word you are looking to find.

Step 3 is to select an "action," such as delete it or move it to a specified folder. You may then have to again "Edit" the description by clicking the blue underline.

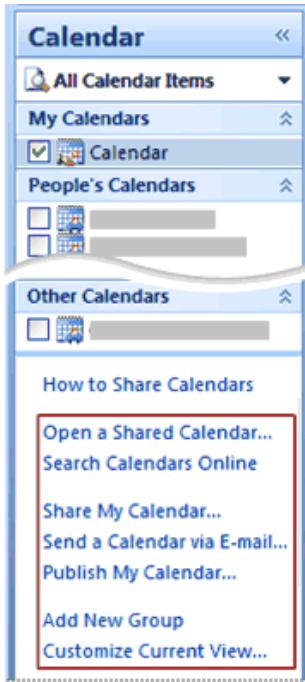
Step 4 is to provide any exceptions, and the final step is to "Turn on this rule."

## Custom Outlook Considerations

Most of the default settings for MS Outlook are located on the "File" tab on the ribbon, at the bottom of the menu under "Options."

Important considerations include

- **Mail**—Where you can pick plain text, rich text, or HTML; spell check and autocorrect; signatures, stationery, and fonts; how replies are handled; when messages are saved or sent; receipts.
- **Calendar**—Work hours (start/end time), color, reminders, add holidays, fonts.
- **Contacts**—How names are filed, use of photos.
- **Tasks**—Reminders, colors.
- **Advanced**—Outlook panes, autoarchive, empty deleted items when exiting



## Introduction to calendar sharing

You can share calendar information with other people by using Microsoft Office Outlook in many ways.

In Calendar, in the **Navigation Pane** (Navigation Pane: The column on the left side of the Outlook window that includes panes such as Shortcuts or Mail and the shortcuts or folders), there are several links to help you get started quickly with calendar sharing. The links that you see will vary, depending on the accounts that are configured in your Outlook profile..

**Open a Shared Calendar** When you use an Exchange account, you can open another person's default Exchange Calendar if the person has granted you permission to do so.

If the other person whose Calendar you want to open has not granted you permission to view it, Outlook prompts you to ask the person for the permission you need. If you click **Yes**, a sharing request e-mail message opens automatically. The message requests the person to share his or her Calendar with you and also provides the option to share your default Calendar with him or her.

After you access a shared Calendar for the first time, the Calendar is added to the Navigation Pane. The next time you want to view the shared Calendar, you can click it in the Navigation Pane. For more information, see [Share calendar information quickly with Navigation Pane links](#).

**Share My Calendar** When you use an Exchange account, you can share your default Exchange Calendar with someone. This person receives an e-mail notification that you have shared your Calendar. You can also request that the recipient share his or her Exchange Calendar with you. For more information, see [Share calendar information quickly with Navigation Pane links](#).

## Open a Shared Calendar

You can quickly view another person's shared default Exchange Calendar from the **Navigation Pane** (Navigation Pane: The column on the left side of the Outlook window that includes panes such as Shortcuts or Mail and the shortcuts or folders).

1. In **Calendar**, click **Open a Shared Calendar**.
2. Type a name in the **Name** box, or click **Name** to select a name from the Address Book.
3. Click **OK**.

The shared Calendar appears next to any calendar that is already in the view.

After you access a shared Calendar for the first time, the Calendar is added to the Navigation Pane. The next time you want to view the shared Calendar, you can click it in the Navigation Pane.

If the other person whose Calendar you want to open has not granted you permission to view it, Outlook prompts you to ask the person for the permission you need. If you click **Yes**, a sharing request e-mail message opens automatically. The message requests the person to share his or her Calendar with you and also provides the option to share your default Calendar with him or her.

You can quickly schedule a meeting with people whose calendars you can view. On the **Actions** menu, point to **New Meeting Request With**, and then click **All** or the names that you want from the list.

You can open only the default Calendar. Even if a person has created additional calendars, you can open only the default Calendar.

To remove a calendar from the **Other Calendars** list, right-click the calendar, and then click **Remove from Other Calendars**.

The owner of the calendar items controls who can view the items and change them.

