

Microsoft Outlook 2010 – Level 1

2 – Outlook 2010 basics



OUTLOOK 2010 BASICS

InFocus

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 booklet 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

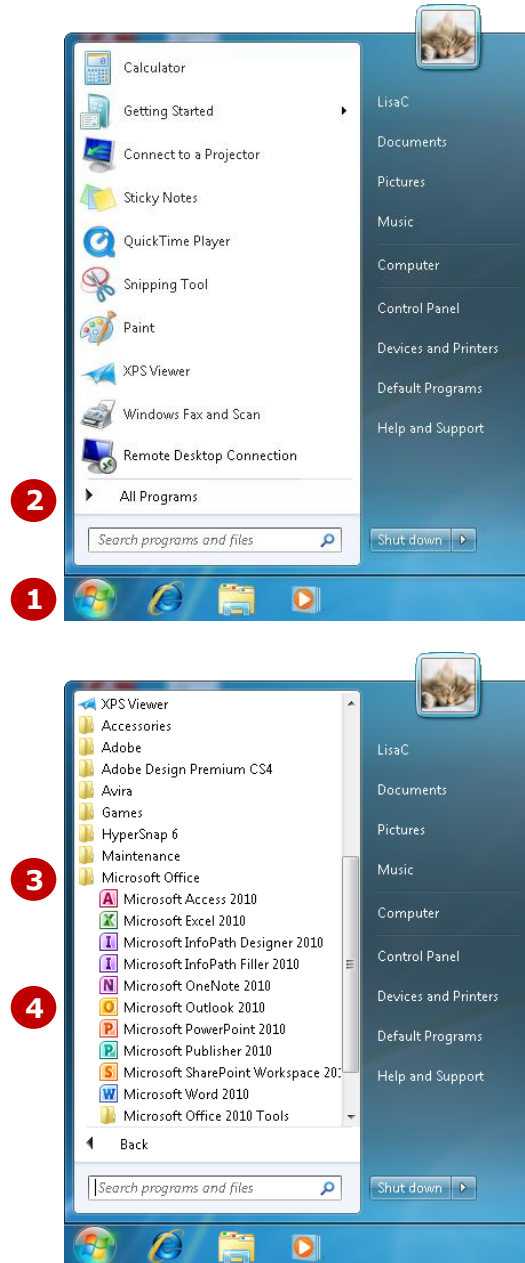
Microsoft Outlook is started is largely determined by Windows. For example, it can be started from the Windows **Start menu** or from a **shortcut** on the desktop or taskbar.

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**

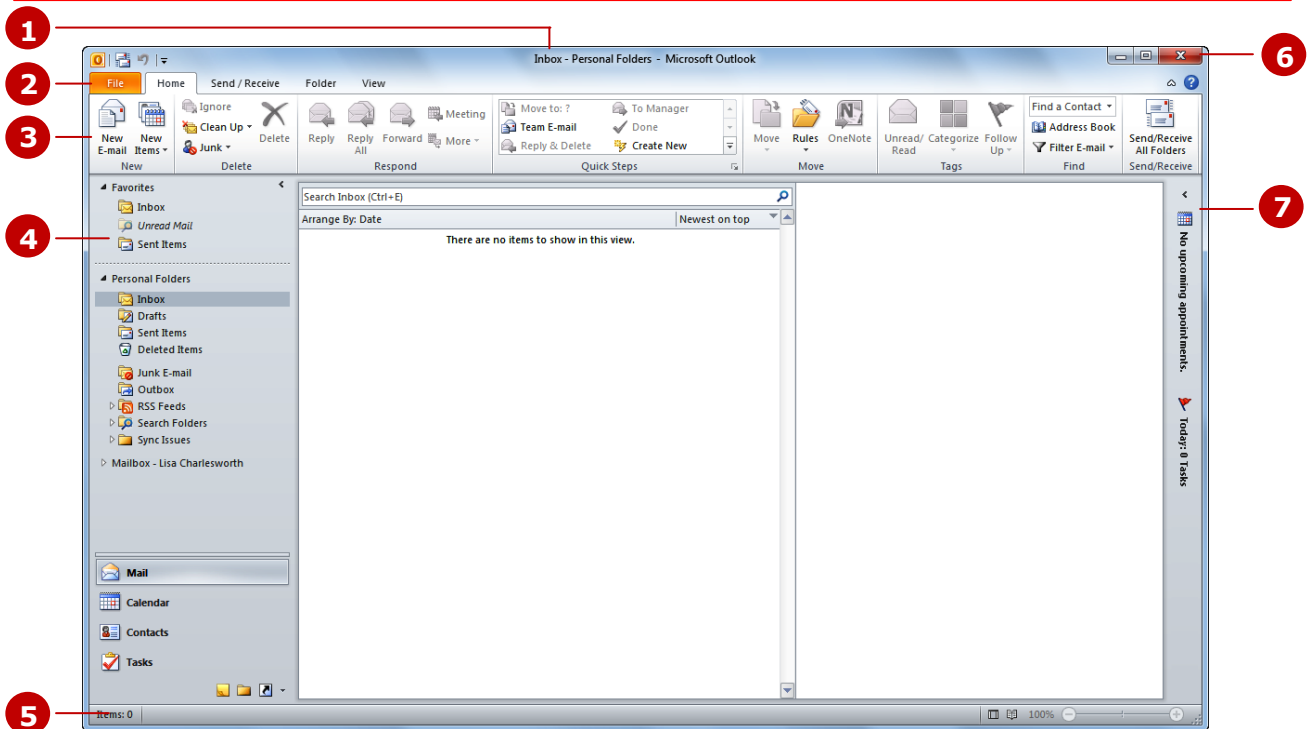
Handy to Know...





- 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

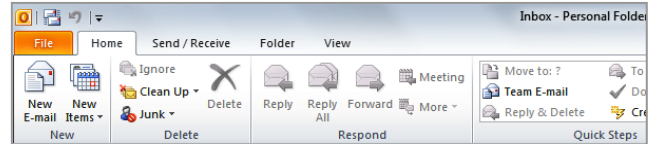
display the command groups. Commands are activated by clicking on a button, tool or gallery option. Everything you could possibly want to do in Outlook will be found somewhere on this Ribbon.

Try This Yourself:

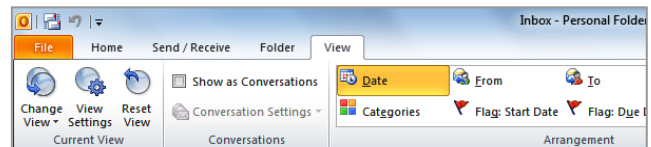
Before starting this exercise ensure Outlook has started...

- 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

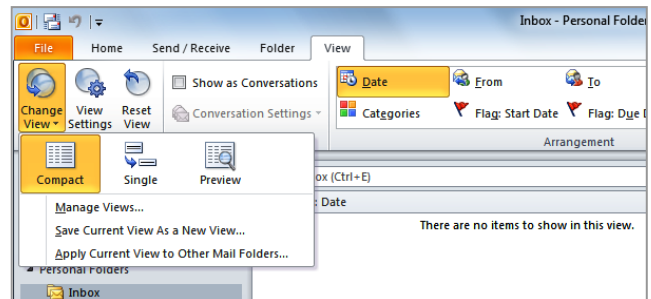
1



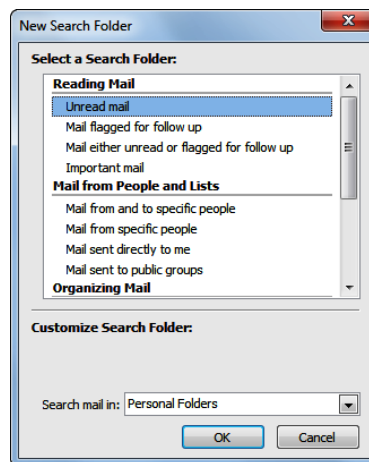
2



3



5




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

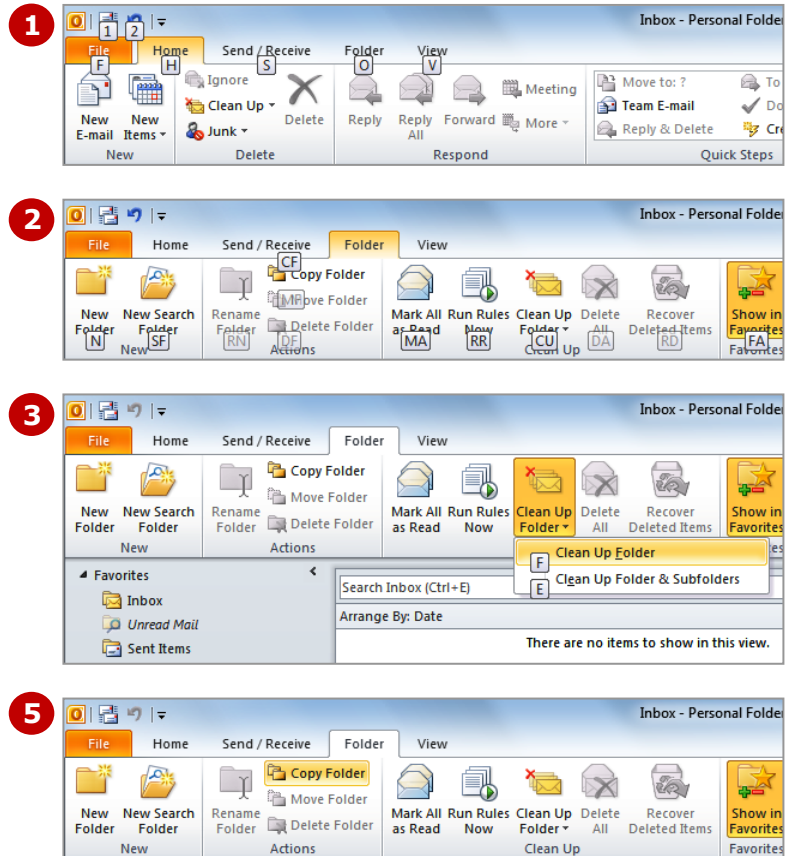
The **Ribbon** is normally accessed with a mouse. However, you can also use the keyboard to access **Ribbon** commands. When you press **[Alt]**, the letters known as **key tips** or **access keys**, will appear next

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

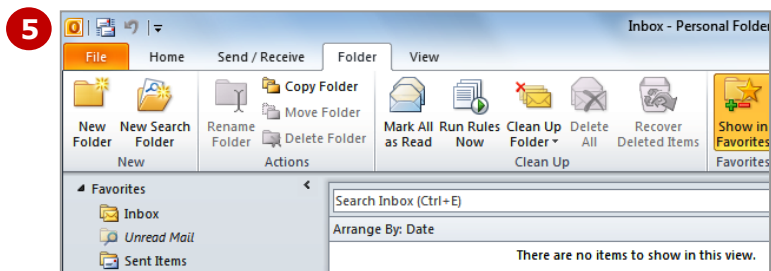
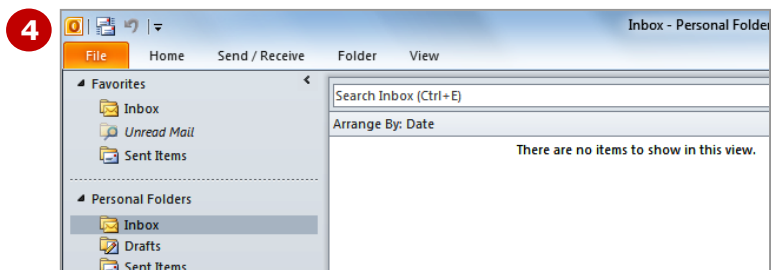
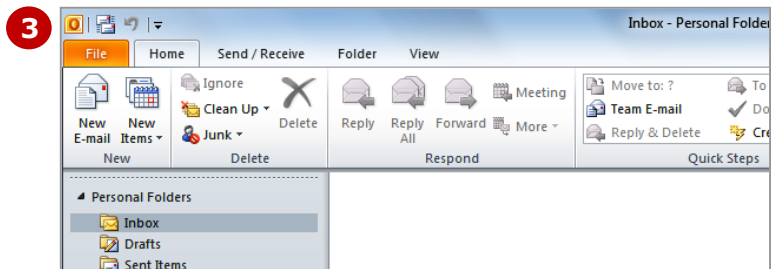
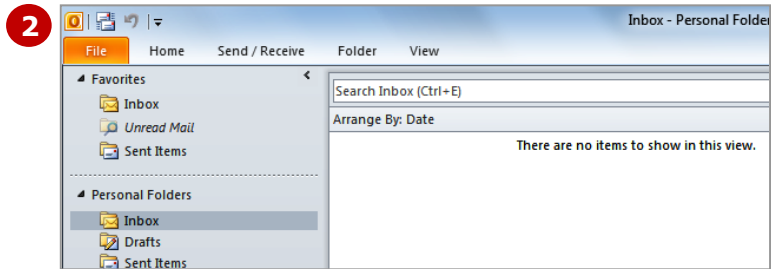
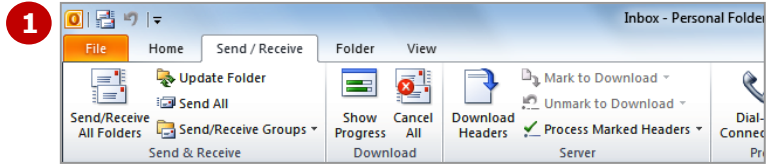
The **Ribbon** at the top of the screen, valuable as it is, does tend to occupy a reasonable amount of space. You can minimise the **Ribbon** so that only the tabs appear visible. You can minimise the

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

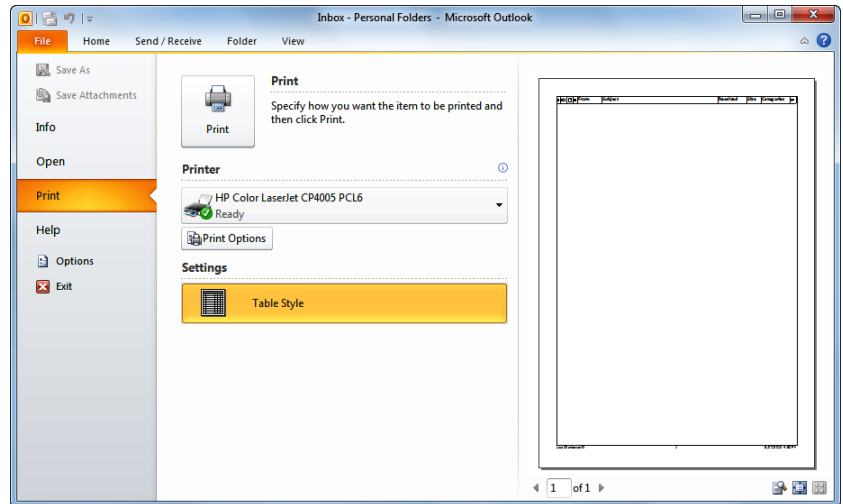
that are not directly related to creating or managing an Outlook item. For example, you can access account details, clean your mailbox, save attachments and configure other settings.

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.

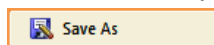
At the left of the **Backstage** is a navigation pane which is made up of **Quick commands**, smallish buttons that will perform an operation immediately, and largish **tabs**, which display more options and information to the right of the screen.

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

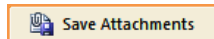


Quick Commands

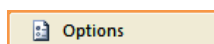
The **Quick commands** provide immediate access to an operation.



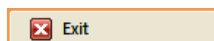
Allows you to save the current Outlook item under a different name or location



Allows you to save all attachments in a selected email message



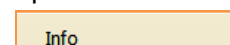
Provides access to options that allow you to control how Outlook appears and works



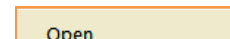
Allows you to close and exit Microsoft Outlook

Backstage Tabs

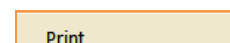
The **Backstage tabs** provide more options for working with a document



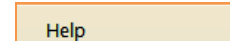
Lets you modify account settings, clean your mailbox, and create and manage rules and alerts



Lets you open a previously saved calendar or data file, and import and export files



Lets you preview and print the current Outlook item



Provides access to Microsoft's help network and also provides licensing information about your software

ACCESSING THE BACKSTAGE VIEW

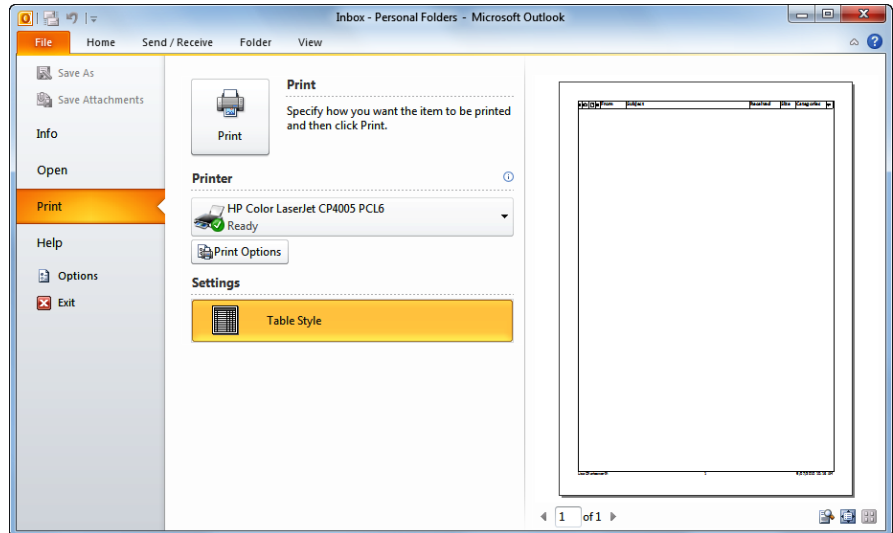
Many Outlook settings that are not directly related to creating or managing Outlook items, such as **Print** and account management options, are placed in the **Backstage view**. You usually access the

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



3



4

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**.

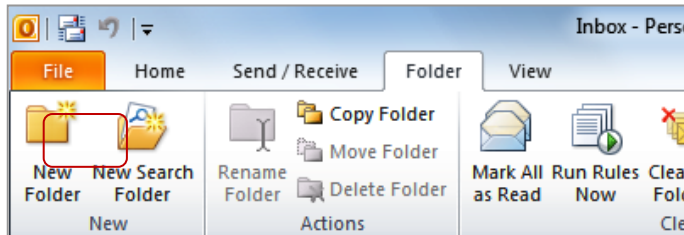
UNDERSTANDING THE QUICK ACCESS TOOLBAR

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.

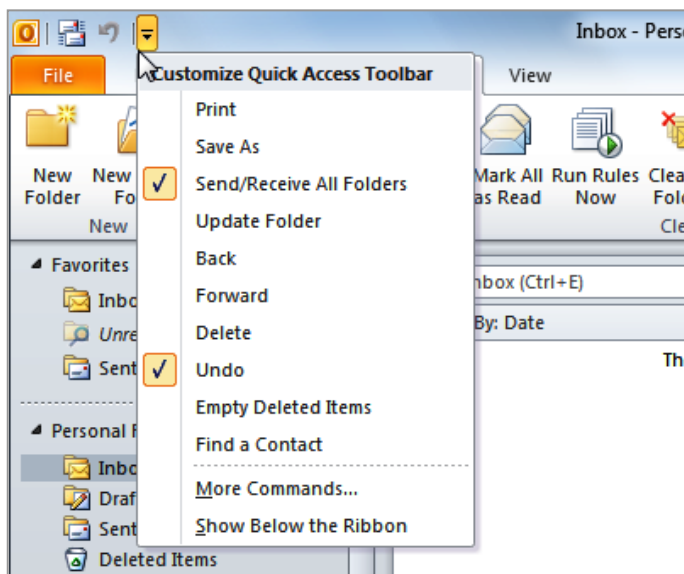
The Quick Access Toolbar

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

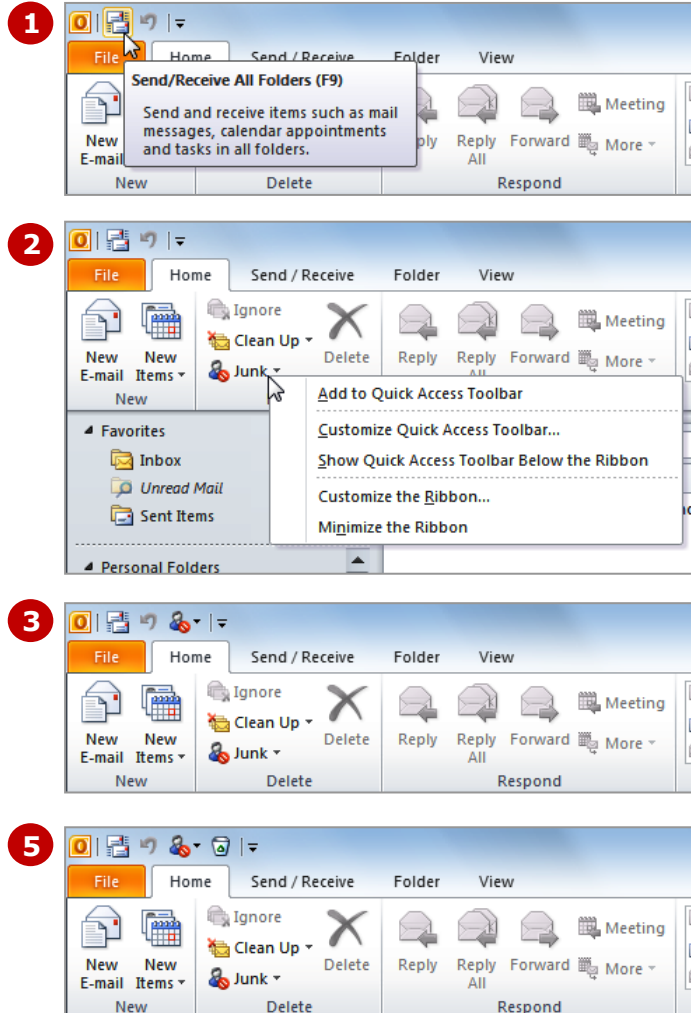
The **Quick Access Toolbar** is a handy location to place commands from the **Ribbon** that you use most frequently. Adding commands from the **Ribbon**

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

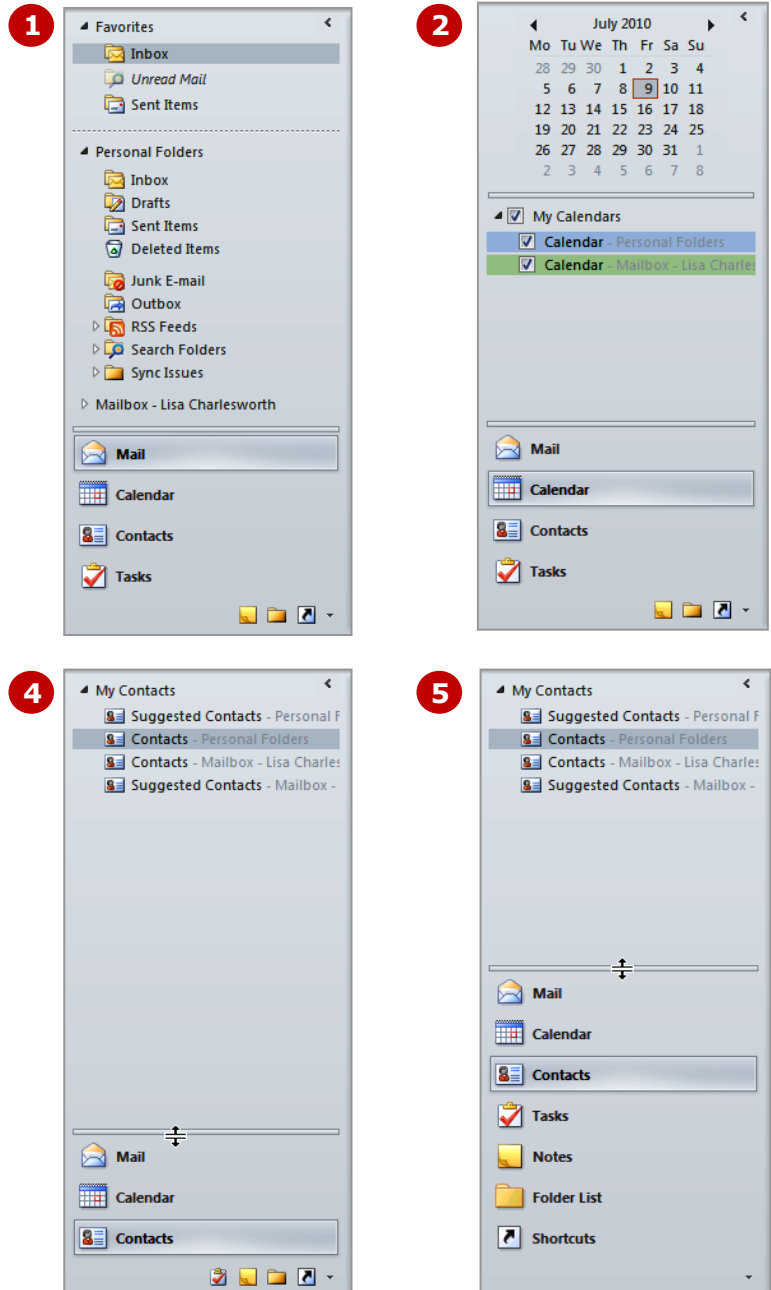
You use the **Navigation** pane to navigate to the various features in Outlook. The **Navigation** pane, which appears to the left of the screen, normally displays a folder list and a series of buttons that

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**.


THE NAVIGATION PANE

The **Navigation pane** appears in all views by default. It is often the focal point of Outlook as it is where you can access the features, such as **Mail**, **Calendar**, and the like. Sometimes, however, you may wish


to turn off the **Navigation pane** or to reduce its size so that you have a greater area of the screen available to work with information, such as your email lists and so on.

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 **Minimised**

The Navigation pane will minimise to a narrow column at the left of the screen...


- 2** Click on **Calendar**  in the **Navigation** pane to open the **Calendar** feature

Notice that the Calendar button remains highlighted. You can close the Navigation pane if you need more space...

- 3** Click on **Navigation Pane**  and select **Off**

- 4** Repeat step **1** to display the minimised **Navigation** pane again

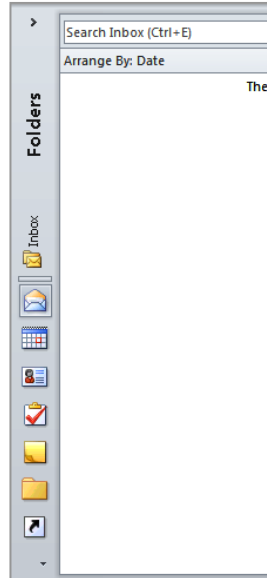
You can also expand and minimise the Navigation pane using tools...

- 5** Click on **Expand the Navigation Pane**  (at the top of the **Navigation** pane) to expand the **Navigation** pane

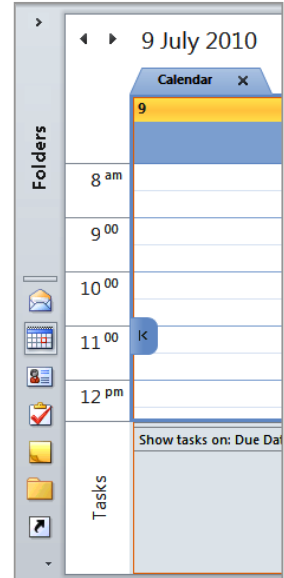
It will expand to the same width as it was previously...

- 6** Click on **[Mail]** to open the **Mail** feature

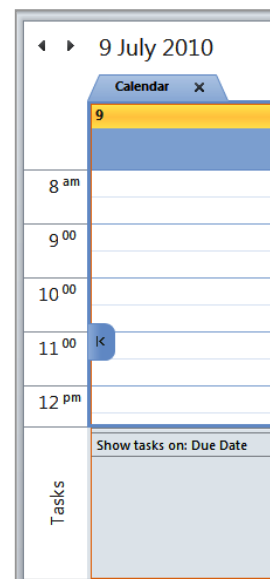
1



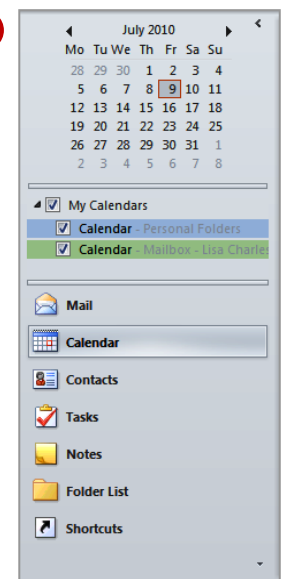
2



3





5



For Your Reference...

To **minimise** or **maximise** the **Navigation pane**:

1. Click on **Minimise the Navigation Pane**  to minimise the **Navigation** pane
or
Click on **Expand the Navigation Pane**  to expand the **Navigation**

Handy to Know...

- You can also close the **Navigation** pane by right-clicking on the **Navigation** pane and selecting **Off**.
- If you exit Outlook with the **Navigation** pane minimised, the **Navigation** pane will be minimised when you next start Outlook.




THE TO-DO BAR

The **To-Do Bar** integrates your tasks, emails flagged for follow-up, forthcoming appointments and calendar information in one central place on the screen. Additionally, if you subscribe to a

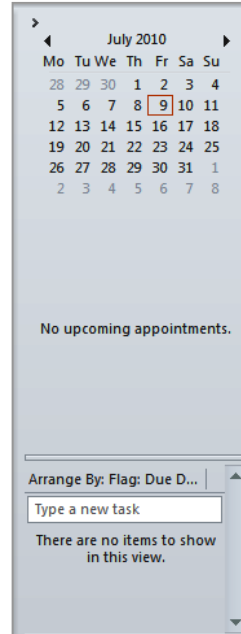
SharePoint task list, any tasks assigned to you can also be included in the **To-Do Bar**. The **To-Do Bar** consolidates in one view all of your priorities so that you can easily manage and track them.

Try This Yourself:

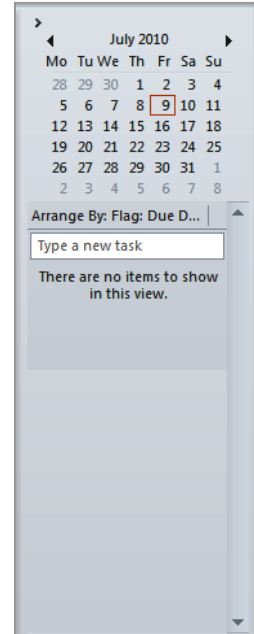
Before starting this exercise ensure Outlook has started...

- 1** Click on the **View** tab, then click on **To-Do Bar**  in the **Layout** group and select **Normal**. Any upcoming appointments and tasks will appear in the To-Do Bar on the right side of the screen. You can modify the contents in the bar...
- 2** Click on **To-Do Bar**  and select **Appointments** to turn off the **Appointments** feature.
- 3** Repeat step 2 to turn on the **Appointments** feature again.
- 4** Right-click on the **To-Do Bar** and select **Options** to open the **To-Do Bar Options** dialog box. You can see clearly what tasks will appear...
- 5** Click on **[Cancel]**. Let's return the bar to the default minimised state again...
- 6** Click on **Minimise the To-Do Bar**  to minimise the **To-Do Bar**.
- 7** Click on any part of the minimised **To-Do Bar** to temporarily expand the bar, then click outside the bar to minimise it again.

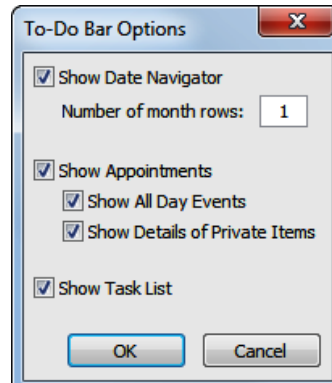
1



2

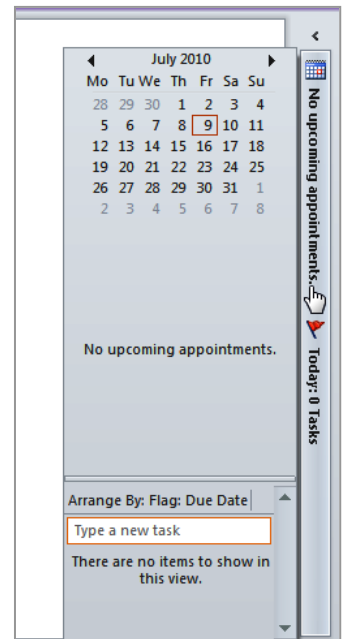


4





Even in its minimised state, Outlook shows today's appointments and number of tasks in the To-Do bar.

7



For Your Reference...

To **work** with the **To-Do Bar**:

- Click on **Minimise the To-Do Bar**  to minimise the **To-Do Bar**.
- Click on **Expand the To-Do Bar**  to maximise the **To-Do Bar**.
- Right-click on the **To-Do Bar** to change any of its settings.

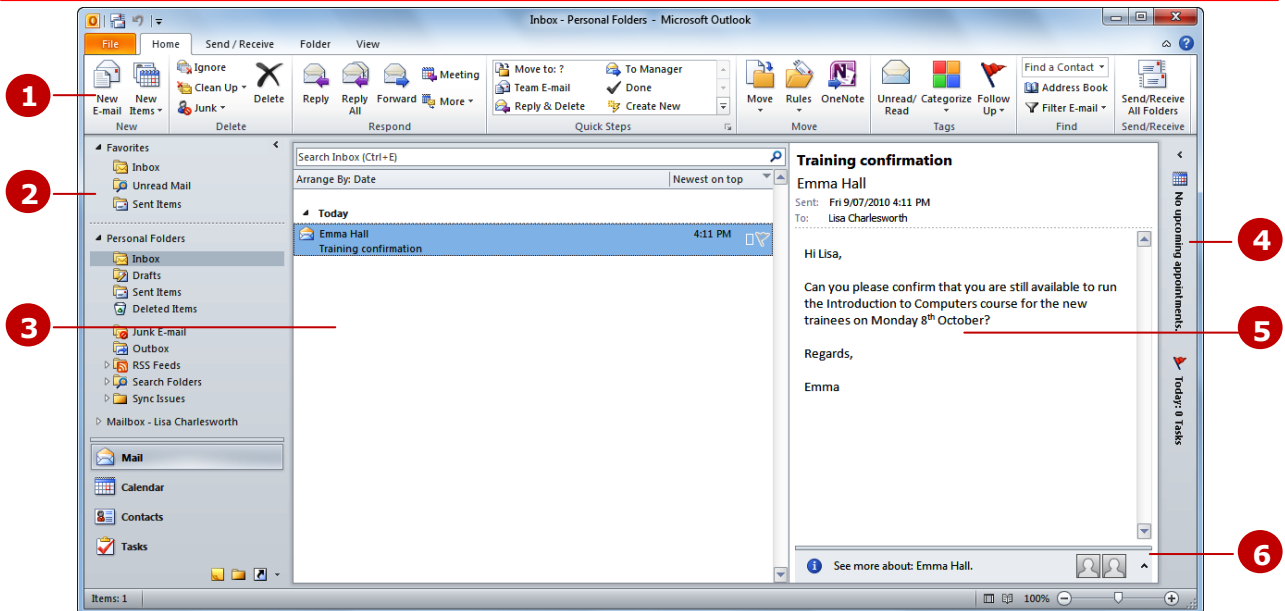
Handy to Know...

- You can drag the left border of the **To-Do Bar** to make it wider. By doing this, you can not only see more of your appointment and task information, but you may also see another month or two of calendar information at the top of the **To-Do Bar**.

THE MAIL SCREEN

The **Mail** screen in Outlook is used to manage your email, both incoming (received from someone else) and outgoing (sent to another person).

The **Mail** screen can be configured to show various amounts of information and details about messages.



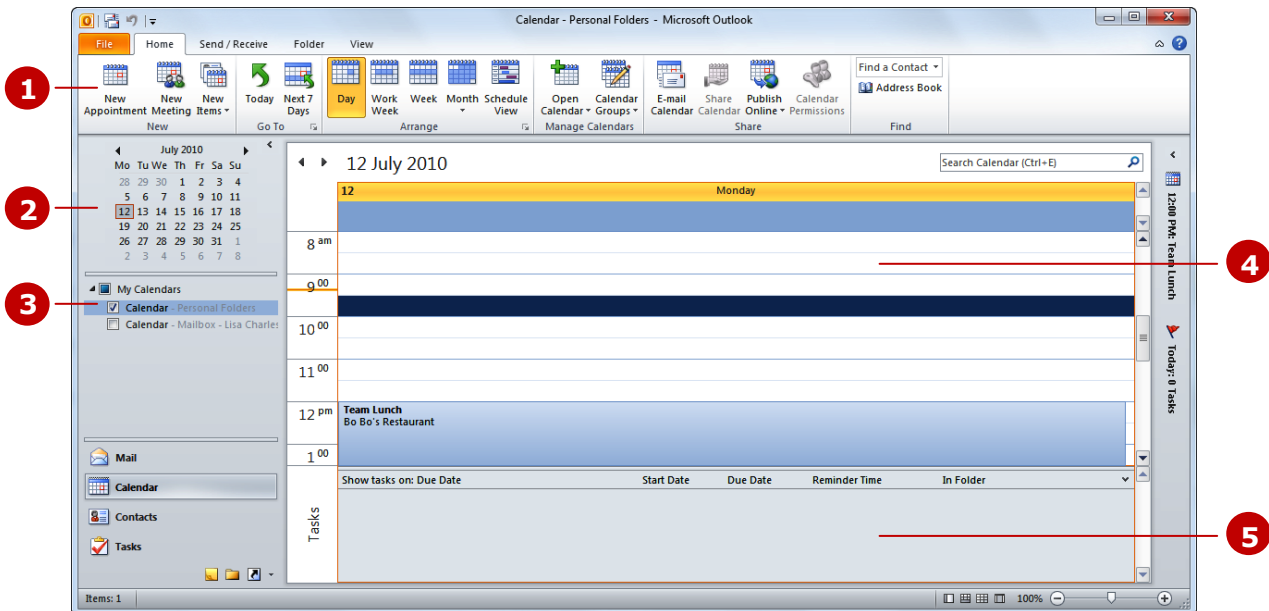
- 1 The **Ribbon** provides tools to help you when working with the **Mail** feature. For example, it provides commands to help you reply to messages, delete messages, forward messages, and so on.
- 2 The **Mail Navigation pane** displays a series of folders specific to email and email operations. These folders are a little bit like the trays you keep on your desk for messages. For example, there is an **Inbox** folder which lists the messages that have been sent to you, a **Sent Items** folder which lists the messages that you have sent to others, and an **Outbox** which is a temporary folder where messages are stored before they have been sent by the system.
- 3 The **Message view** displays the messages that are in the current folder. Normally you can only view one folder at a time – and the one you are looking at is the current folder. A folder is made current by clicking on its name in the **Navigation** pane. All of the messages for the folder will be displayed in the **Message view**. These messages can be arranged in a specific order and even listed in specific groupings. Messages that have not yet been sent or read appear in bold.
- 4 The minimised **To-Do bar**.
- 5 The **Reading pane** (which is optional) displays the contents of the message currently highlighted in the **Message view**. The **Reading pane** allows you to read the contents of messages without having to open them in their own specific window.
- 6 The Outlook Social Connector, or **People pane**, appears minimised as a single line at the bottom of the **Reading** pane. The **People** pane, when expanded, lets you view and access information that the Outlook Social Connector displays from social networks. If your organisation uses Microsoft Office SharePoint Server 2010, the Outlook Social Connector can automatically connect with your organisation's SharePoint sites to display your colleagues' available activity items.

(Note: You must download and install an Outlook Social Connector provider add-in for each internet social network that you want to use.)

THE CALENDAR SCREEN

The **Calendar** screen in Outlook is designed to allow you to create a calendar or diary of events. These events appear in a calendar layout style allowing you to

quickly see the start and finish times for these events. You can also set alarms against events so that Outlook will remind you when they are imminent.

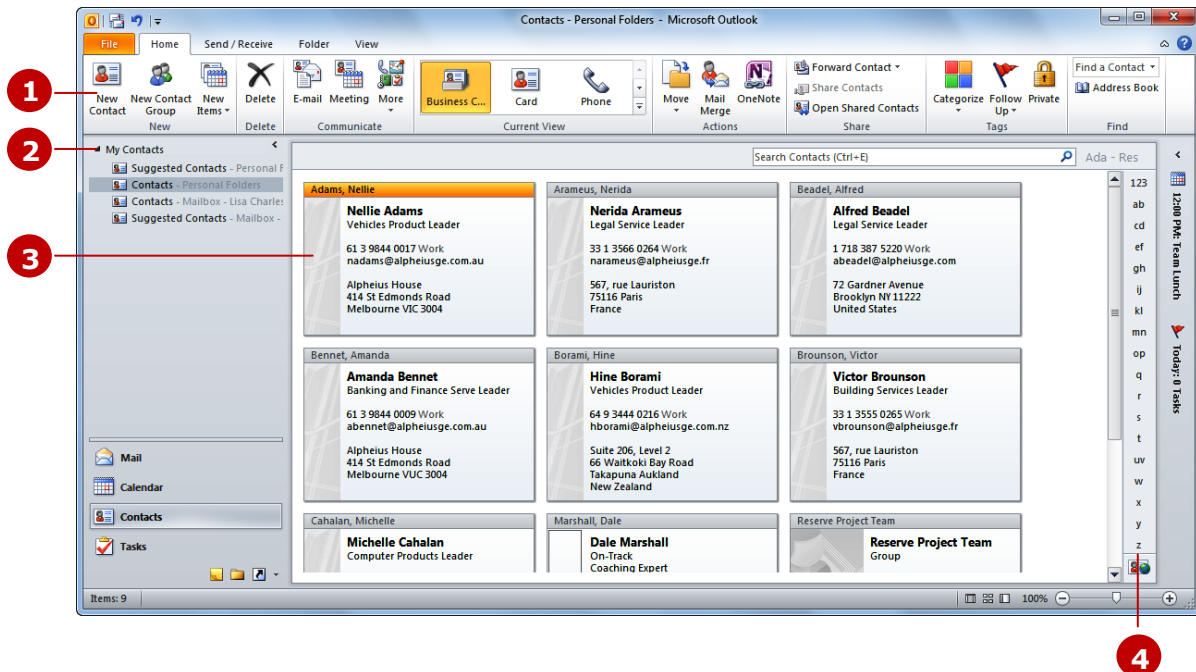


- 1** The **Ribbon** provides tools to help you when working with the **Calendar** feature. For example, you can change how the calendar displays, create new appointments and meetings, share your calendar and so on.
- 2** The **Monthly Calendar** allows you to quickly navigate to a specific day simply by clicking on the date in the **Monthly Calendar**. When you click on a date the calendar for that day will appear in the right pane.
- 3** The **Calendar selection** allows you to choose which calendars to display in the pane to the right of the screen. In the example above there is one calendar on display. Outlook allows you to display multiple calendars on the screen.
- 4** The **Calendar** area is where the calendar or calendars appear. You can display multiple calendars and these can be either private (accessible only to the current user) or shared. Shared calendars allow you to display calendars for groups of people such as those working on a specific task or project.
- 5** The **Daily Task List** displays your tasks and to-do items. It appears by default only in the **Day**, **Work Week** and **Week** views of the Calendar.

THE CONTACTS SCREEN

The **Contacts** screen in Outlook provides information about people and organisations that you deal with. The listing can be displayed in a variety of ways and allows you to capture a wide range of information

such as names, addresses, telephone numbers, email addresses, etc. Not only can you manage your contacts in Outlook but you can also link the data with other programs too.

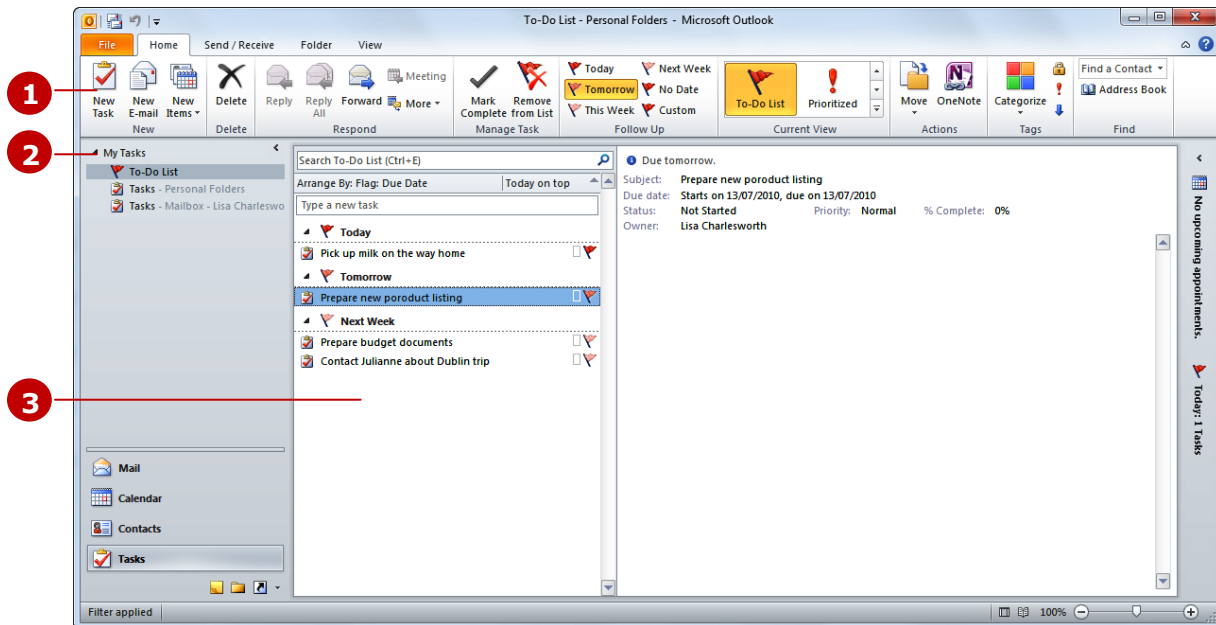


- 1 The **Ribbon** provides tools to help you when working with the **Contacts** feature. For example, it provides commands to add and delete contacts and contact groups, email contacts, flag the contact card, plus more.
- 2 The **Contacts folder groups** area lists your Contacts folders that store your saved contacts. This includes the default **Contacts** folder that is created for each Outlook profile plus the **Suggested Contacts** folder. You can create additional folder groups as necessary. For example, you may want to create a contacts folder for a specific project and then share it with your co-workers.
- 3 A **Contact** is displayed normally in an alphabetical listing. You can double-click on a contact here to see more details about the contact.
- 4 The **Contacts Navigation** area consists of a number of alphabetical buttons. These buttons are used to display the contacts in alphabetical groupings. For example, if you click on the letter **E**, all of the contacts whose names begin with **E** will be displayed.

THE TASKS SCREEN

The **Tasks** screen in Outlook is designed as a place to record and track tasks. It is, in essence, a **To-Do** listing. The **Tasks** screen can be used to display tasks in chronological order, and it is where you

can mark off tasks as they are in progress and when they are completed. Tasks created here are also displayed on the **To-Do bar** and in the **Daily Task List** in the **Calendar**.

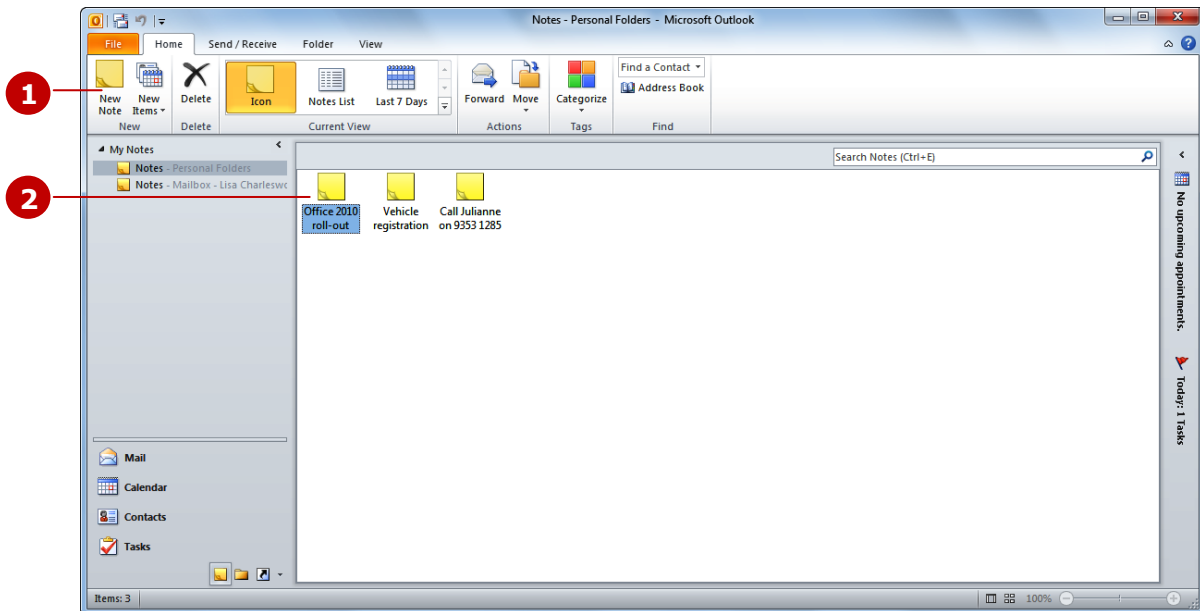


- 1 The **Ribbon** provides tools to help you when working with the **Task** feature. For example, it provides commands to add tasks, delete unwanted tasks, complete tasks, and so on.
- 2 The **My Tasks** area lets you view the tasks either in a **To-Do List** (which displays a task's details in the right pane when selected, as shown above) or as a summarised **Tasks** list. You can filter the tasks that appear using the options in the **Current View** gallery – for example, you can display only active (unfinished) tasks, only completed tasks, plus more.
- 3 The **Tasks** area displays a list of tasks, such as those that have not yet been completed.

THE NOTES SCREEN

The **Notes** screen in Outlook is used to jot down and manage short notes. These notes can be anything that you like such as short simple memory joggers, telephone

numbers, receipt numbers, prices, shopping lists, and more. In many ways the **Notes** section is like the sticky notes you use at your desk.

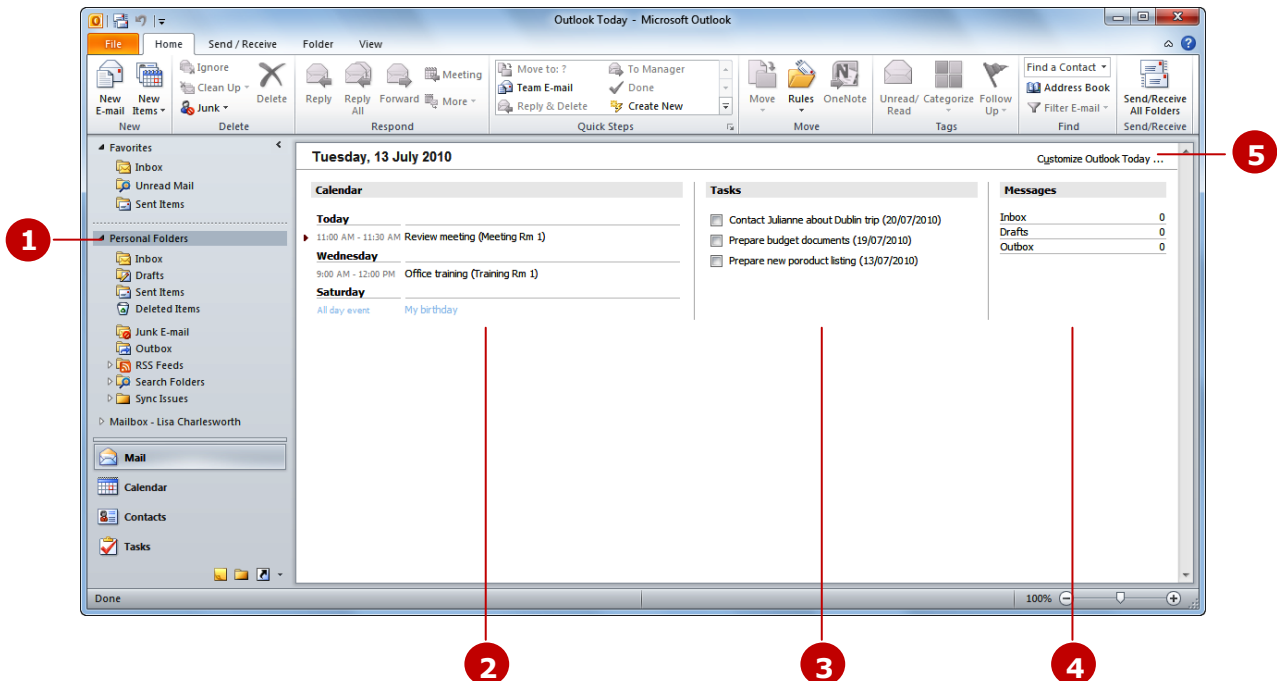


- 1 The **Ribbon** provides tools to help you when working with the **Notes** feature. For example, it provides commands to create and delete notes, display the notes as large or small icons, and find notes.
- 2 The **Notes** themselves appear in the main part of the window. When you double-click on a note, it will open in a small window and it will look very similar to the sticky ('Post-it') notes that you use at your desk.

THE OUTLOOK TODAY SCREEN

The **Outlook Today** screen provides a preview of your day. By using Microsoft's **Outlook Today**, you can see a summary of your appointments, a list of your tasks, and how many new email messages you


have. You can set this page to be the first page that opens when you start Outlook. You can also change the way **Outlook Today** appears.



- 1** To view your **Outlook Today** page, click on either **Personal Folders** (as in the example above) or **Mailbox – Your name** (for a Microsoft Exchange account) in the **Navigation** pane. You can also click on **Shortcuts** (at the bottom of the **Navigation** pane) and click on **Outlook Today** to view your **Outlook Today** page.
- 2** The **Calendar** area shows a summary of your appointments for today as well as appointments for a designated number of days after today's date.
- 3** The **Tasks** area shows all tasks or it can be customised to show only tasks that need to be worked on today.
- 4** The **Messages** area shows you a count of the number of unread messages in your **Inbox** and **Outbox** folders, plus the number of messages in the **Drafts** folder. But, you can customise this area to show a count for any of your **Mail** folders.
- 5** Click on **[Customise Outlook Today]** to access a screen where you can specify all custom settings for how you want **Outlook Today** to appear. You can control how many days of information will be displayed in the **Calendar**, how the tasks will be displayed and sorted, and which Mail folders will be displayed in the **Messages** area. You also are given the option to make **Outlook Today** your start-up page and you can change the style used for **Outlook Today** to a different predefined style.

EXITING OUTLOOK

Outlook conforms to standard Windows conventions and can therefore be closed using either the **Exit** command in the **Backstage view** or by clicking on the

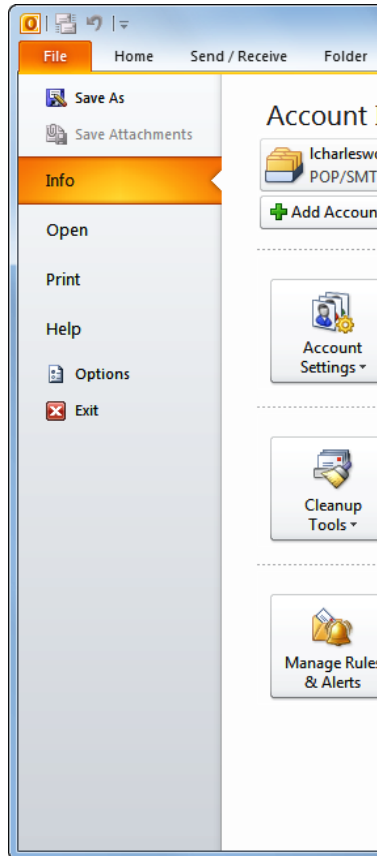
close button  at the top right corner of the application window. When you close Outlook you will be disconnected from your mail servers.

Try This Yourself:

Before starting this exercise ensure Outlook has started...


- 1** Click on the **File** tab to open the **Backstage view**
- 2** Click on the **Exit** quick command at the bottom left of the screen
After a moment Outlook will close

1




For Your Reference...

To **exit** Outlook:

1. Click on the **File** tab and click on the **Exit** quick command
or
Click on **close** 

Handy to Know...

- Since **Mail** and accessing **Contacts** is almost an integral part of working with your computer, it is better to keep Outlook minimised rather than close it.
- You can also close Outlook by double-clicking on the small Office button  in the top left corner of the title bar.

CONCLUDING REMARKS

Congratulations!

You have now completed the **Outlook 2010 basics** booklet. This booklet was designed to get you to the point where you can competently perform a variety of operations as listed in the objectives on page 2.

We have tried to build up your skills and knowledge by having you work through specific tasks. The step by step approach will serve as a reference for you when you need to repeat a task.

Where To From Here...

The following is a little advice about what to do next:

- Spend some time playing with what you have learnt. You should reinforce the skills that you have acquired and use some of the application's commands. This will test just how much of the concepts and features have stuck! Don't try a big task just yet if you can avoid it - small is a good way to start.
- Some aspects of the course may now be a little vague. Go over some of the points that you may be unclear about. Use the examples and exercises in these notes and have another go - these step-by-step notes were designed to help you in the classroom and in the work place!

Here are a few techniques and strategies that we've found handy for learning more about technology:

- visit CLD's e-learning zone on the Intranet
- read computer magazines - there are often useful articles about specific techniques
- if you have the skills and facilities, browse the Internet, specifically the technical pages of the application that you have just learnt
- take an interest in what your work colleagues have done and how they did it - we don't suggest that you plagiarise but you can certainly learn from the techniques of others
- if your software came with a manual (which is rare nowadays) spend a bit of time each day reading a few pages. Then try the techniques out straight away - over a period of time you'll learn a lot this way
- and of course, there are also more courses and booklets for you to work through
- finally, don't forget to contact CLD's IT Training Helpdesk on **01243-752100**