Microsoft® Office Outlook®: overview

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Contents

About This Course ***1***

Course Prerequisites *1*
Course Overview *1*
Course Objectives *2*
How To Use This Book *2*

Lesson 1: Getting Started with Outlook ***3***

TOPIC A: Navigate the Outlook Interface **4**
E-mail *4*
E-mail Addresses *5*
Microsoft Outlook *5*
Items and Folders *6*
Components of the Outlook Interface *6*
Components of the Ribbon *9*
The Backstage View *10*
The Mail Workspace *12*
Mail Folders *13*
Read and Unread Messages *14*
Message Icons *15*
The Calendar Workspace *16*
The People Workspace *17*
Additional Outlook Tools *18*
Peeks *18*
Activity 1-1 ..... *20*

LESSON 1: MICROSOFT OUTLOOK

Lesson Objectives

In this lesson you will learn how to:

- Navigate the Outlook interface.
- Perform basic e-mail functions.
- Use Outlook help.

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TOPIC A: Navigate the Outlook Interface

Microsoft Office Outlook is a powerful and easy-to-use e-mail client and scheduling manager. Nearly everyone who has used an e-mail client has probably worked with a version of Outlook. It is used in many organizations worldwide and it has become one of the most used e-mail clients on the market. While the incredible amount of features that are available in this latest version of Outlook may seem daunting at first, once we cover the basics of working with it, you will be well on your way to becoming an Outlook master.

Topic Objectives

In this topic, you will learn:

- About e-mail and e-mail addresses
- About Microsoft Outlook About
- items and folders
- About components of the Outlook interface, with a focus on the ribbon
- About the Backstage view
- About the Mail, Calendar, and People workspaces
- About mail folders
- About read and unread messages
- About message icons
- About additional Outlook tools
- About Peeks

E-MAIL

The term **"e-mail"** refers to the electronic communication of messages between two or more parties that is almost instantaneous. Since its inception, e-mail has become the standard of communication in almost all organizations. With e-mail as pervasive as it is today, it is vital to keep your e-mail and your contacts organized. This is where an e-mail client steps in.

Instructor Tip: The first e-mail message was sent in 1971.

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E-mail Clients
E-mail clients are applications that facilitate the sending, receiving, and management of e-mail. While many online e-mail clients are available from organizations such as Google and Microsoft, many people prefer the flexibility and organizational capabilities that a desktop e-mail client like Outlook can offer.

E-MAIL ADDRESSES

E-mail communication revolves around **e-mail addresses**. If you need to communicate with another person using e-mail, you need to know what their e-mail address is, such as **johnsmith@example.org**.

E-mail addresses are comprised of three main parts:

- The name or handle of the person that you are e-mailing (**johnsmith** in this example)
- The **@** symbol
- The domain (**example.org**), which includes both the host name and an extension like .com or .org

MICROSOFT OUTLOOK

Microsoft Outlook is a versatile e-mail client and a personal information manager (PIM). This means that you can use Outlook to create, send, and manage e-mail; manage your address book; keep track of your to-do list; and schedule appointments. The different components of Outlook are all integrated, so you can use your contacts to address an e-mail, track all contact with a particular person, or send your community group tasks. Basic Windows functions, like cutting, copying, and pasting, are also included.

There are also many add-ins that you can download or purchase to provide additional functionality in Outlook. As well, other applications (such as antivirus software, word processors, and contact managers) also add their tools into Outlook to help you manage your data. While you don't need to worry about these tools right now as they won't be covered in this course, it is good to know about them in case you see objects within your copy of Microsoft Outlook that don't match the pictures or descriptions in these lessons.

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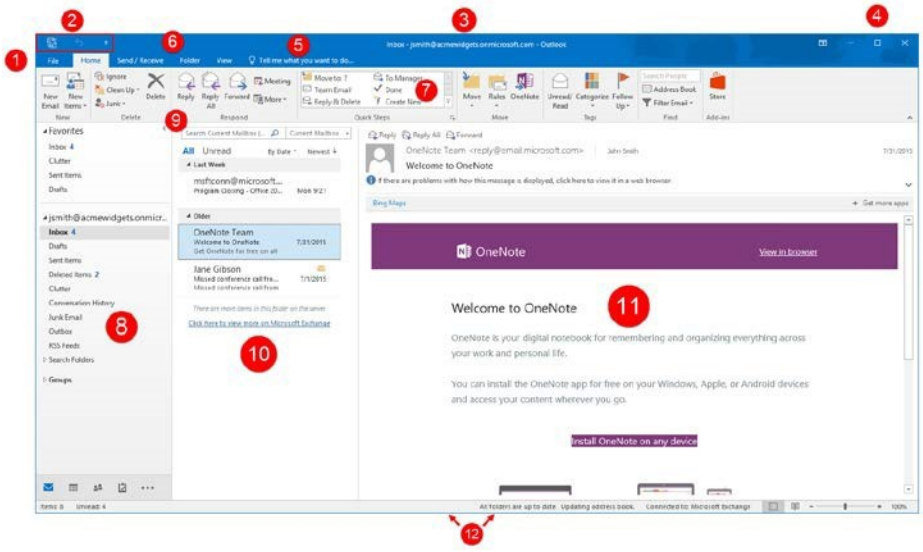
ITEMS AND FOLDERS

It is important to remember that there are two interface objects that you will commonly work with in Outlook: items and folders. **Items** are individual objects. For example, an item can include a single e-mail message or a meeting in your calendar. **Folders**, on the other hand, are used to organize items. While you can have many different folders, the Inbox, Drafts, Sent Items, and Deleted Items folders are all included by default.

COMPONENTS OF THE OUTLOOK INTERFACE

The Outlook interface can be intimidating at first glance, but it can be broken down into several distinct parts. While the interface will be slightly different for each folder or workspace that we look at, the basic components will remain the same. Below you can see how the Outlook application looks when the Mail workspace is shown:



Let's look at the various components that make up the interface.

1: File Menu (Backstage View)
Click the File tab to open Backstage view. With this view, you can manage your mailbox, open other Outlook files, print Outlook items, get help, modify Outlook options, and close Outlook.

2: Quick Access Toolbar

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This specialized toolbar provides quick access to the commands you use most often.

3: Title Bar

The name of the current folder, your mailbox, and the program name will appear here.

4: Window Controls

From left to right, these are the Ribbon Display Options, Minimize, Maximize/Restore, and Close commands.

5: Tell Me

Using this text box, you are able to ask questions and access help information.

6: Tabs

Groups of like commands are organized under tab names. Click a tab to view related commands in the ribbon.

7: Groups

The commands on each tab are separated into groups. In the sample diagram, the Quick Steps group of the Home tab is identified. This group provides commands to apply and manage Quick Steps.

8: Navigation Pane

This pane is the easiest way to get around in Outlook. It contains links to various workspaces so that you can easily view your contacts, mail, calendar, and more. Sometimes this is also referred to as the Folder pane.

Instructor Tip: The icons shown in the image here represent the Compact Navigation setting. If the Compact Navigation option is unchecked in the Navigation Options dialog, text (Mail, Calendar, etc.) will appear instead of the icons.

9: Search Box

Use this area to search for items within your mailbox.

10: Working Area

Here is where you can see the contents of the selected folder or workspace. In the sample diagram, we can see new mail because we're in the Inbox.

11: Reading Pane

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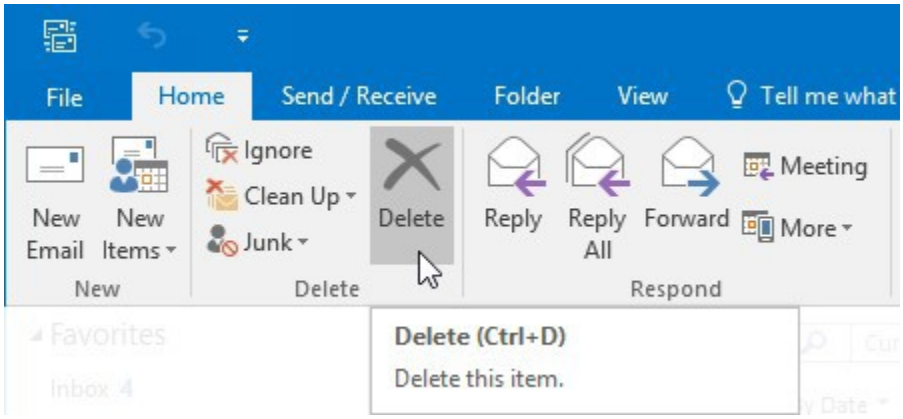
View the contents of the selected item here.

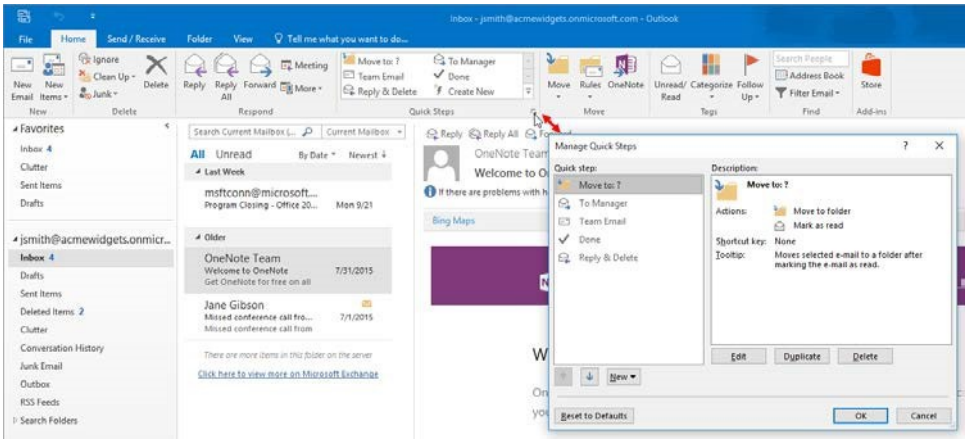
12: Status Bar
Displays item count for the current folder as well as view commands and helpful information.

ScreenTips
ScreenTips appear as a small pop-up when you move your cursor over an object in the Outlook interface, such as a ribbon command:



They include information like the name of the object, what the object does, and a keyboard shortcut {if applicable}.

Dialog Box Launchers
Some groups feature an option button {} beside the group name. Click this button to open a dialog with more specific controls relating to this group and other commands in the tab:



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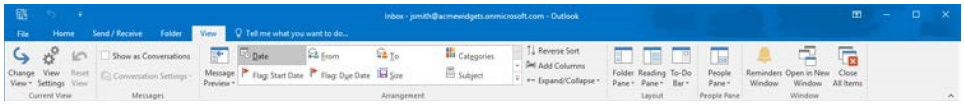
COMPONENTS OF THE RIBBON

The ribbon is the primary location where you interact with all of the various commands and controls that are available in Outlook. It is comprised of two major parts: **tabs** and the **groups** that are found within them.

Groups (and their contained commands) that appear within a tab relate to the functions described by the tab name. For example, the View tab contains a variety of groups with commands to adjust how objects are displayed in Outlook:



There are five **tabs** (including the File tab) that are available in Outlook's main interface. Below is a breakdown of the kinds of commands that you will find in each tab:

- **File:** This tab gives you access to Backstage view. Here, you will find commands that are used to modify how Outlook in general or the selected Outlook item operates. You can find a variety of categories under this tab, including Save As, Info, and Print.
- **Home:** The Home tab is displayed by default, but the commands and title of this tab will depend whether you are working with the general Outlook window or a specific item. For example, if you have a message open in a separate window, the Home tab will be labeled Message and include commands to manage and work with the message. If you are working with the general Outlook window, this tab will include commands to manage items in Outlook.
- **Send/Receive:** This tab includes commands that relate to the sending and receiving of data to and from your e-mail account.
- **Folder:** This tab is used to manage the folders that make up Outlook. Here, you can find commands to modify folder properties, create new folders, and delete existing ones.
- **View:** On this tab, you will find commands to change how the Outlook layout is displayed.

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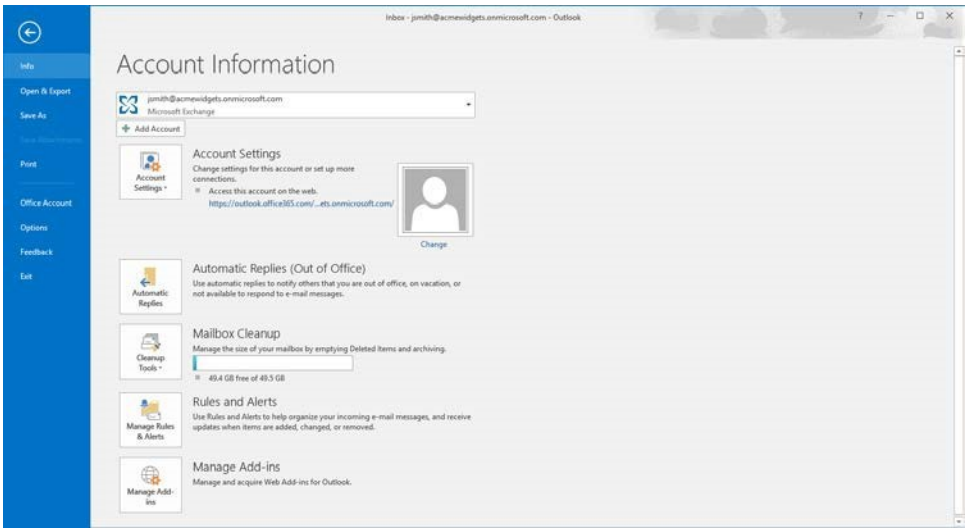
THE BACKSTAGE VIEW

The Backstage view is accessed by clicking the File tab. It will look slightly different depending on whether you are in the main interface or inside the window for an Outlook item.

For example, if you click the File tab while viewing the main interface and Mail workspace, you will see commands to manage your e-mail account, messages, and other related settings:



Here is a quick overview of the items in Backstage view in this context:

Info	Manage your mailbox account settings, access mail cleanup tools, manage rules and alerts, and set up automatic replies.
Open & Export	Provides commands to open a calendar or Outlook data file. You can also start the Import and Export wizard from here or open another user's folder if you are on an Exchange server.
Save As	Save the currently selected item as a separate file outside of Outlook.
Save Attachments	Save attachments to the currently selected item as separate file{s} outside of Outlook. Only available if the selected item has attachments.

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Print	Set print options for the selected item and print preview it.
Office Account	Modify the settings for the account that you are using to log into Office.
Options	Opens the Outlook Options dialog.
Feedback	Opens the Windows Feedback app.
Exit	Close Outlook.

If you have an Outlook item (like an e-mail message) open in a separate window, the Backstage view will look like this:

Let's look at these commands.

Info	Provides commands to restrict permission to the item, move the item, resend or recall a message, and view message properties.
Save/Save As	Save the currently selected item as a separate file outside of Outlook.
Save Attachments	Save attachments to the currently selected item as separate file(s) outside of Outlook. Only available if the selected item has attachments.

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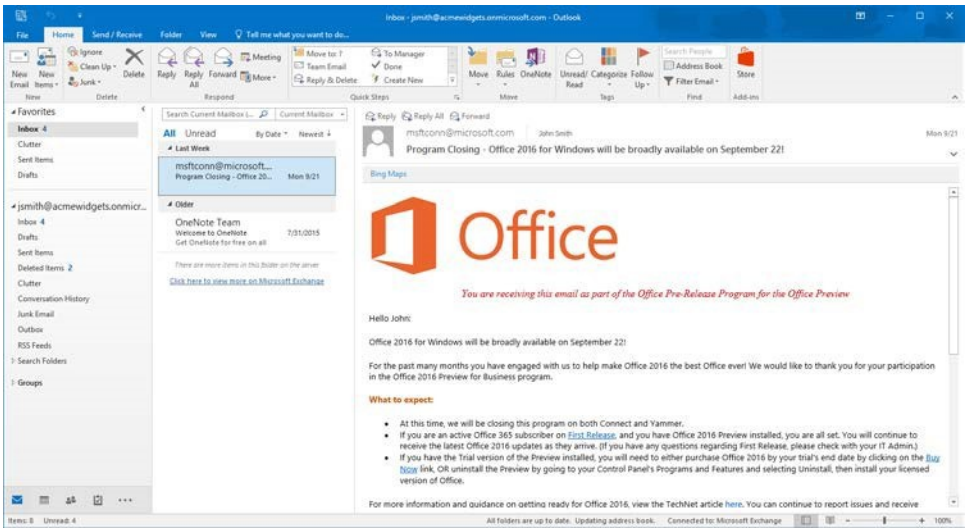
Print	Set print options for the selected item and print preview it.
Close	Close the current Outlook object window.
Office Account	Modify the settings for the account that you are using to log into Office.
Options	Opens the Outlook Options dialog.
Feedback	Opens the Windows Feedback app.

To close Backstage view, click File again or click any of the tabs.

THE MAIL WORKSPACE

When you first open Outlook, the Mail workspace will be displayed by default. This is where you can view and work with any messages that you receive. You will typically spend the bulk of your time in this workspace:



You will see that all of the messages in your account will be stored in a variety of different mail folders. You can find these folders inside the Navigation pane.

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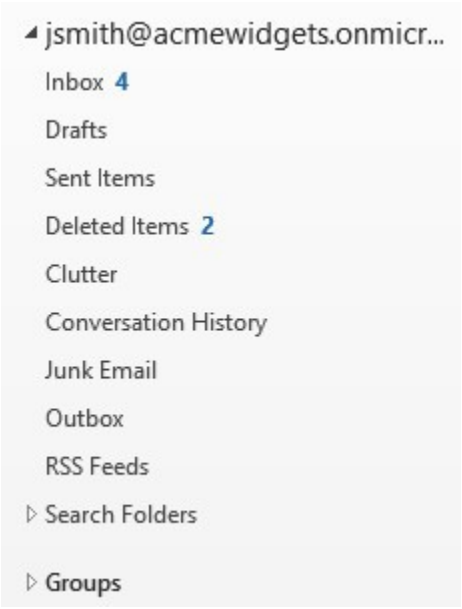
MAIL FOLDERS

The mail folders that appear inside the Navigation pane by default typically include the following:



Instructor Tip: The mail folders that appear in the Navigation pane depend on what features you have enabled and how your mailbox has been organized by you or your mailbox administrator.

Let's take a look at some of these mail folders.

Inbox	This is where new mail is received.
Drafts	Unsent messages can be saved here.
Sent Items	After a message is sent, a copy of it is stored here.
Deleted Items	This folder acts like the Recycle Bin in Windows. When you delete an Outlook item, it goes here first. To permanently remove the items in your Deleted Items folder, click Folder → Empty Folder while in the Deleted Items folder.
Clutter	E-mail that has been identified as less important based on your reading habits will be moved to this folder. Typically this will include items such as newsletters or

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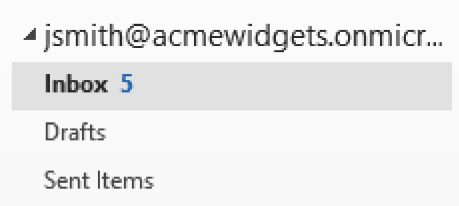
	other mailing lists. Only available with Office 365 customers.
Conversation History	This folder will list conversation history for any contacts that you have interacted with using Microsoft Lync or Skype for Business.
Junk E-mail	E-mail marked as junk will arrive here.
Outbox	Messages you have created are stored here while Outlook connects to the server and sends the message.
RSS Feeds	Live feeds are stored here.
Search Folders	You can customize these folders to update based on search criteria.
Groups	Access shared workspaces. Only available with Office 365 accounts.

READ AND UNREAD MESSAGES

When you receive new messages, the folder that contains them will appear bold within the Navigation pane and a counter identifying the number of unread messages will be displayed adjacent to it:



In the working area, an unread message will also be represented by bold text, but that text will also be colored and you will also see a colored line along the left of it:

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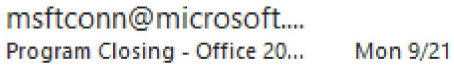
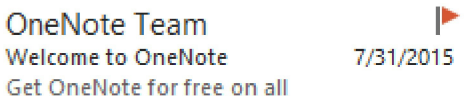
Read messages do not have the bold effect or the line:



MESSAGE ICONS

Messages inside the working area may include one or more message icons. Each message icon is used to represent information about the associated message. For example, here you can see a flag icon that indicates this message has been flagged for follow-up:



Here is a breakdown of the various message icons that you might spot inside a message in the working area:

Replied To		The message has been replied to.
Forwarded		The message has been forwarded.
High Importance	!	The message is important and probably time sensitive.
Attachment		The message includes an attachment.
Flagged for Follow-Up		The message has been flagged for follow-up at a later time or date.

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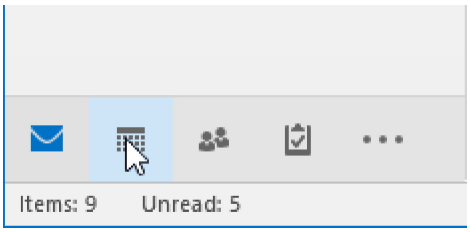
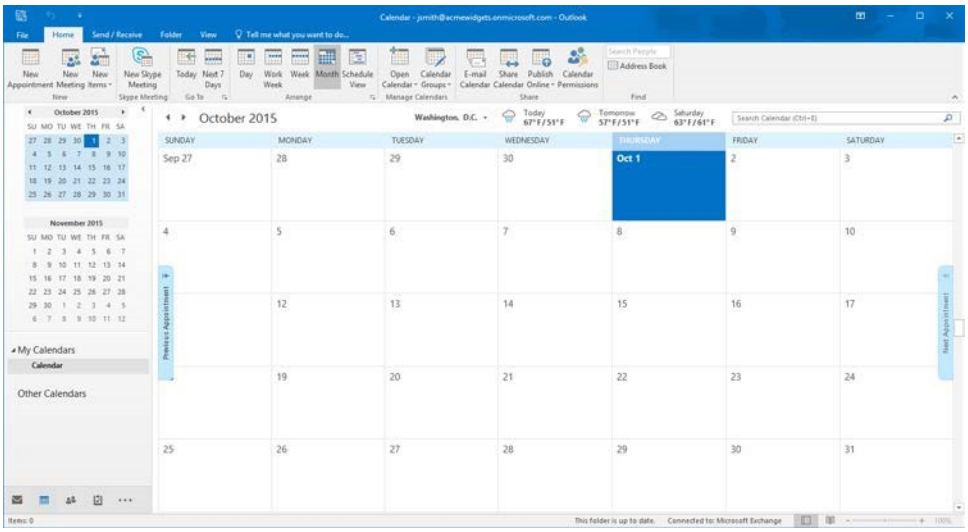
THE CALENDAR WORKSPACE

The Calendar workspace is used to add, remove, and manage events in the Outlook calendar. You can open this workspace by clicking the Calendar button at the bottom of the Navigation pane:



Instructor Tip: You can also use the Ctrl + 2 shortcut.

When open, you will see that the Calendar workspace is comprised of the Navigation pane and the calendar itself:



The Navigation pane shows the current month and allows you to scroll through the months of the year. Clicking on a date in the mini calendar in the Navigation pane will display it in the working area using the current calendar view.

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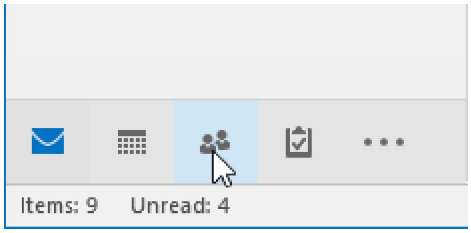
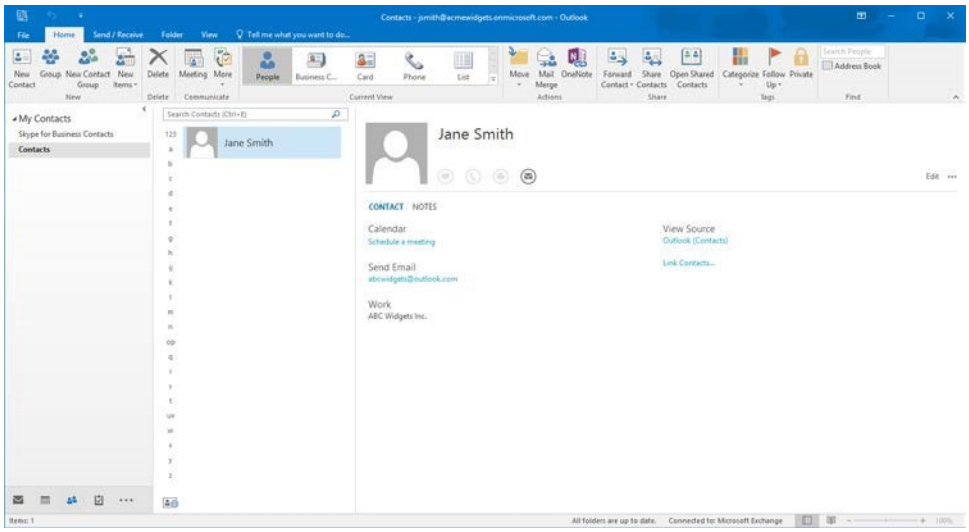
THE PEOPLE WORKSPACE

The People workspace is used to add, remove, and manage any contacts that you have. You can open this workspace by clicking the People button at the bottom of the Navigation pane:



Instructor Tip: You can also use the Ctrl + 3 shortcut.

When the People workspace is open, you will see that it is comprised of the Navigation pane, the working area, and the Reading pane. The Navigation pane will list all the folders that are used to organize your contacts, while the working area is where individual contacts are listed. The Reading pane will show you the details of the selected contact:



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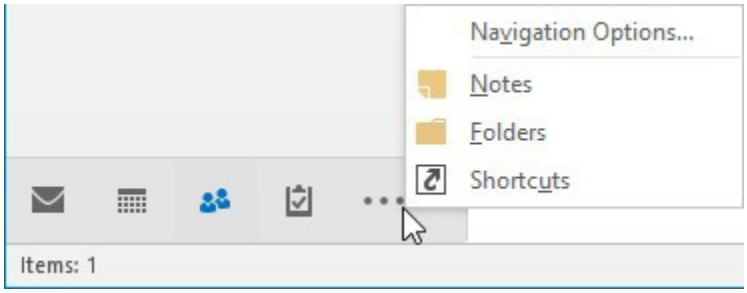
ADDITIONAL OUTLOOK TOOLS

Aside from the Mail, Calendar, and People workspaces, you also have access to other a few Outlook tools and workspaces:



Here is a breakdown of the tools that are available to you:

- **Tasks**: In the Tasks workspace, you can assign tasks to yourself, as well as other people that you have connected with. Any tasks that are listed here will also appear inside the To-Do Bar while working with Outlook.
- **Notes**: The Notes workspace allows you to record quick notes that you want to keep track of. You can then organize these notes using categories and a variety of other features.

Instructor Tip: The Journal is no longer available from the Navigation pane. However, it can still be accessed via the Ctrl + 8 shortcut.

PEEKS

The Peeks feature allows you to "peek" at the contents of the Calendar, People, or Tasks workspaces of Outlook without having to go through the process of opening them up entirely. For example, if you want to have a quick look at any tasks you have scheduled for today, you could use the Peeks feature, rather than opening the entire Tasks workspace.

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To use Peeks, place your cursor over the Calendar, People, or Tasks commands at the bottom of the Navigation pane. For example, here you can see that the cursor has been placed over the People command. The pop-up that appears lists all of your favorite contacts that can then be interacted with:

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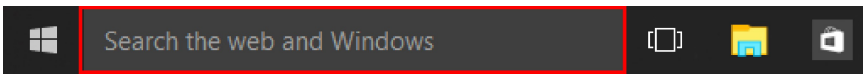
ACTIVITY 1-1

Navigating the Outlook Interface

You are just getting started with Outlook. You would like to explore its interface to get a feel for how it works and where everything is. Note that Outlook must be configured with an e-mail account before students can complete this activity.

1. Type "Outlook " into the search box on the Windows 10 taskbar:



(If you are using Windows 8, start typing at the Start screen to search.)

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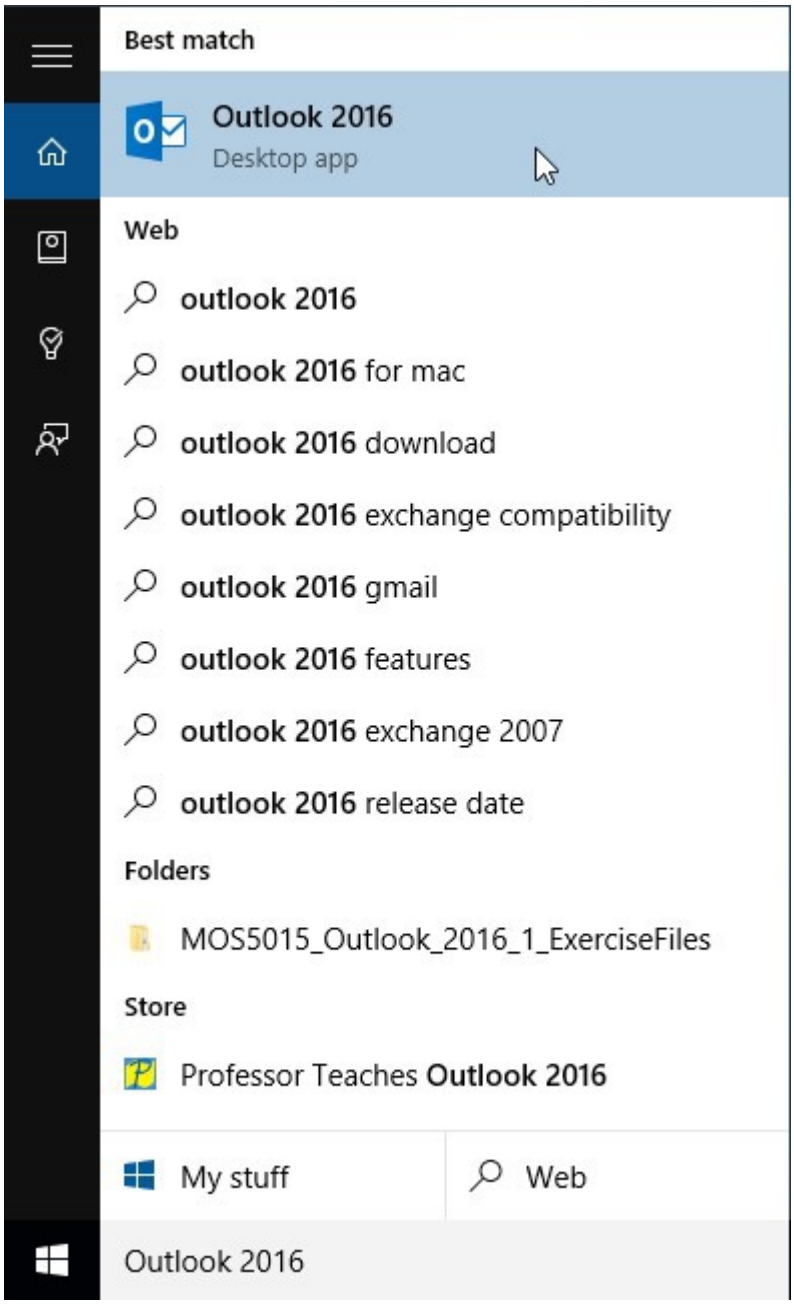
2. Click the entry for Outlook to start the program:



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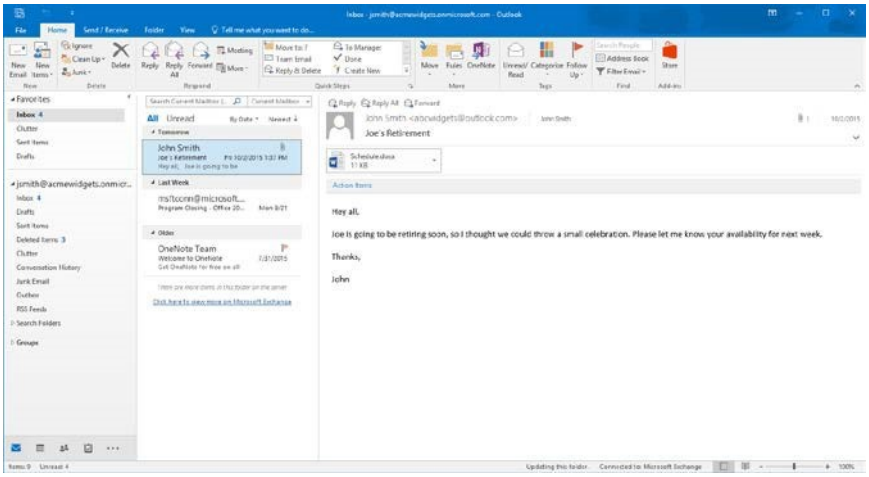
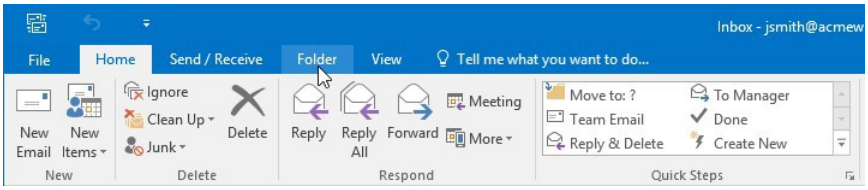
3. Microsoft Outlook will open with the Mail workspace displayed:

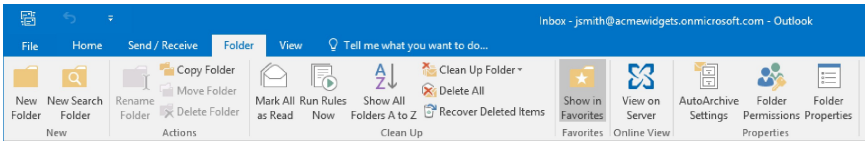


(You will see different messages in your e-mail inbox than those that are shown here.)

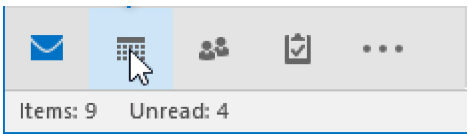
4. Click the Folder tab at the top of the screen:



5. Review the various groups and commands that make up this tab:



6. Click the Calendar command in the Navigation pane:



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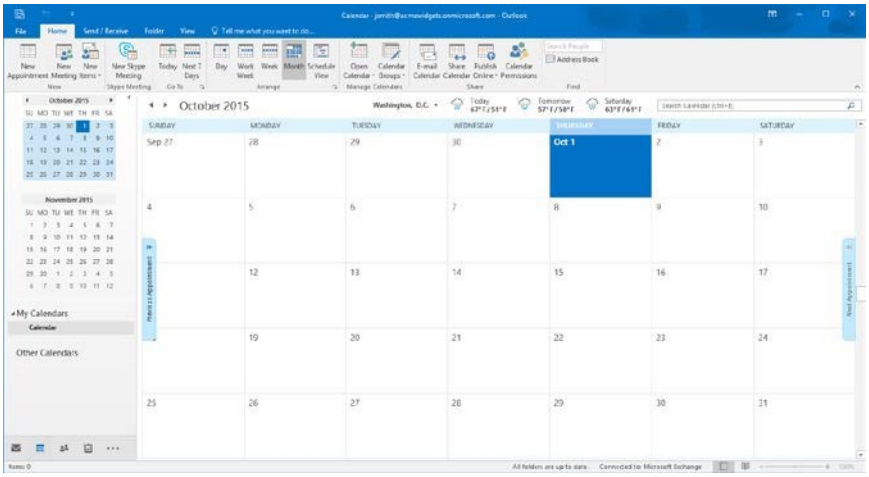
7. The Calendar workspace will now be displayed with the Month view applied:



8. Click People in the Navigation pane:

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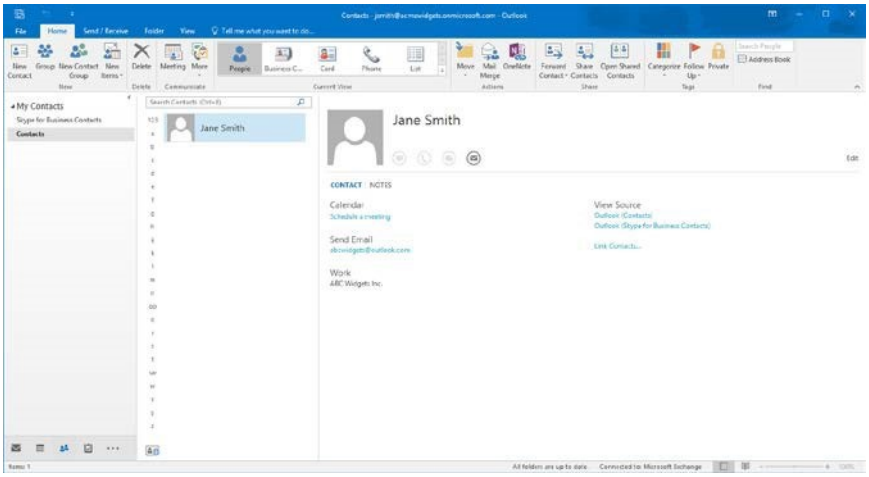
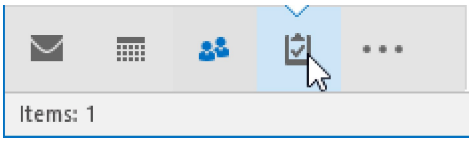
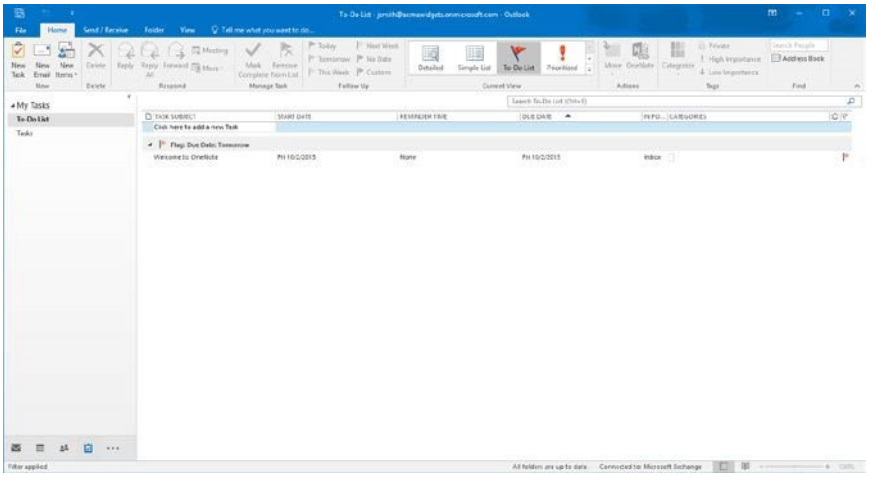
9. The People workspace will now be displayed. Any contacts that you have will be listed in the working area. If you have any contacts, the details of the first item will be shown in the Reading pane:



10. Now click the Tasks button in the Navigation pane:



11. In the Tasks workspace, you will see any tasks that you have ongoing. You will also see tools to organize those tasks:



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12. Click the File tab and click Exit to close Outlook and complete this activity:

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APPENDICES

Keyboard Shortcut Quick Reference Sheet

Search	Go to the Search field	F3 or Ctrl + E
	Use Advanced Find	Ctrl + Shift + F
	Find a contact	F11
Toggle Workspaces	Go to Mail workspace	Ctrl + 1
	Go to Calendar workspace	Ctrl + 2
	Go to People workspace	Ctrl + 3
	Go to Tasks workspace	Ctrl + 4
	Go to Notes workspace	Ctrl + 5
	Go to Folder List view	Ctrl + 6
Message Management	Send an e-mail message	Alt + S
	Go to next message while in Message window	Ctrl + .
	Go to previous message while in Message window	Ctrl + ,
	Flag message for follow-up	Ctrl + Shift + G
	Delete item	Ctrl + D
	Print item	Ctrl + P
	Reply to an e-mail	Ctrl + R
	Reply to all recipients of an e-mail	Ctrl + Shift + R
	Open the Address Book	Ctrl + Shift + B
Mess	Apply bold formatting	Ctrl + B
	Apply underlining	Ctrl + U

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	Apply italic formatting	Ctrl + I
	Highlight text	Ctrl + Alt + H
	Align text to left	Ctrl + L
	Align text to right	Ctrl + R
	Increase font size	Ctrl + Shift + .
	Decrease font size	Ctrl + Shift + ,
	Create a link	Ctrl + K
	Check spelling	F7
	Undo	Ctrl + Z
	Redo	Ctrl + Y
Item Creation	Create a new item of the default type for the current workspace	Ctrl + N
	Create a new appointment	Ctrl + Shift + A
	Create a new meeting request	Ctrl + Shift + Q
	Create a new contact	Ctrl + Shift + C
	Create a new e-mail message	Ctrl + Shift + M
	Create a new task	Ctrl + Shift + K
	Create a new note	Ctrl + Shift + N

Microsoft® Office Outlook®: Part 1

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