



Outlook

Basic to Intermediate

Instructor Guide

[Your Company Name]

Custom **Guide**

EVALUATION ONLY

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Outlook Fundamentals

Microsoft Outlook lets you send and receive email messages, schedule appointments, keep track of tasks, and organize your contacts and addresses.

This module introduces the Outlook fundamentals. You will learn how to find your way around the Outlook screen and item windows. You will also learn how to search for things, delete items, and access Outlook's help features. Let's get started.

Objectives

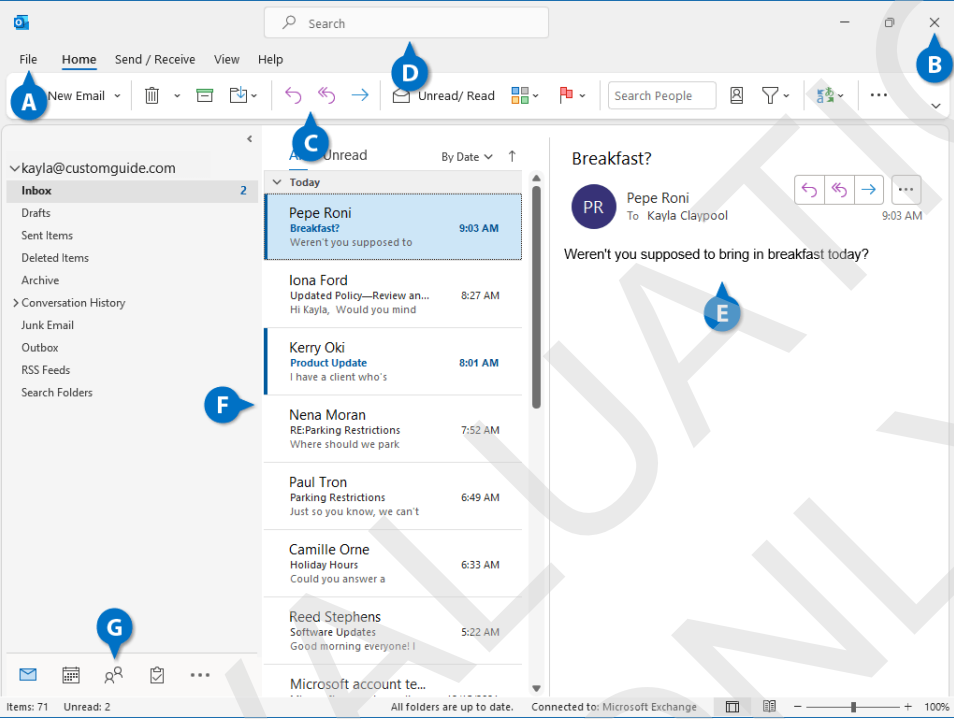
- Understand the Screen
- Navigate Outlook
- Items
- Search
- Delete and Restore Items
- Use the View Tab
- Ribbon Display Options
- Print
- Help

Understand the Screen

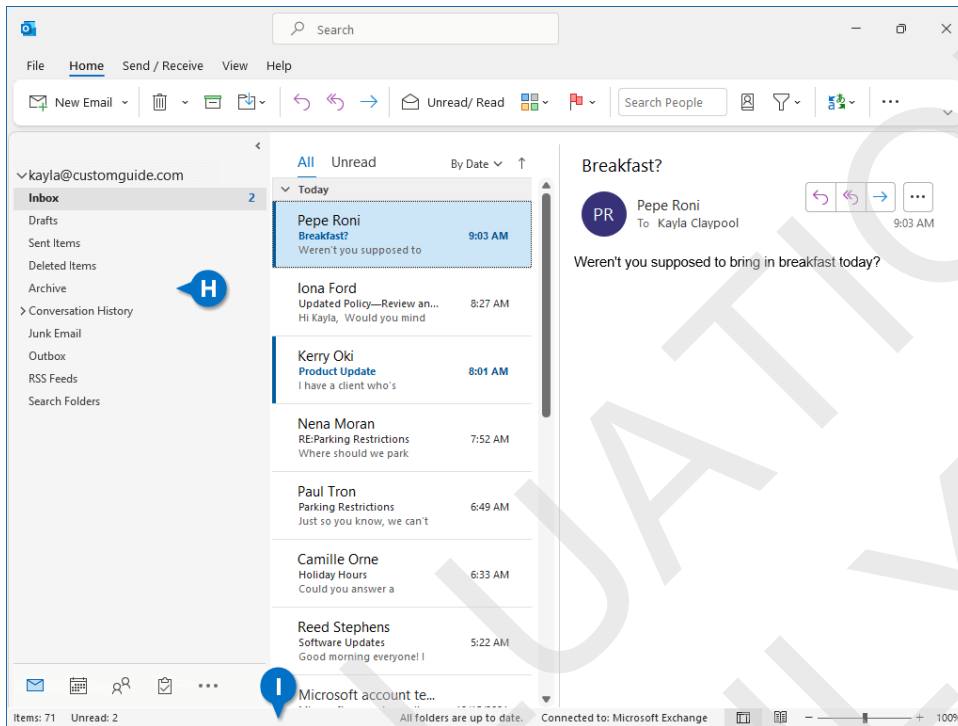
There is a lot going on with the Outlook program screen, so this lesson will help you become more familiar with it. Review the labeled items in the images below, then refer to the tables to see what everything does.

Commented [IG1]:
Discuss the appearance of the Outlook window.

Be sure to point out significant elements such as the ribbon and the Quick Access Toolbar. These features can be discussed more in depth in later lessons.



Outlook Program Screen			
A	File tab: Contains basic file management commands.	B	Close button: Closes Outlook.
C	Ribbon: Contains buttons used to execute commands .	D	Search: Search the current view using keywords .
E	Reading Pane: Displays the contents of the selected messages .	F	Inbox: Lists all your emails; can be arranged according to your specifications .
G	Navigation Bar: Contains links to other parts of Outlook; the current view appears in blue .		



Outlook Program Screen		
	Folder Pane: Navigate to other folders.	Status Bar: Displays information and reminders about Outlook items, right-click to change what is displayed.

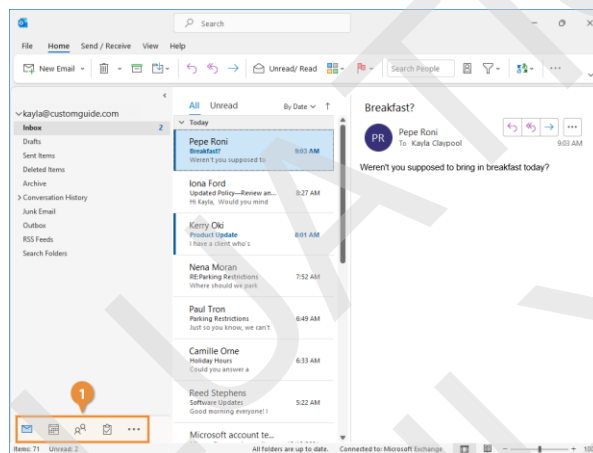
Navigate Outlook

While Outlook displays your Mail by default, you can easily switch the view over to other information, like your Calendar, People, or Tasks.

Use the Navigation Bar

The Navigation Bar at the bottom of the screen links to the other parts of Outlook, and the currently active screen appears in blue.

- 1 Click a link on the Navigation Bar to switch views.
- **Mail:** View your inbox. Read and compose emails.
 - **Calendar:** View your current calendar. Create and edit events.
 - **People:** Search, view, and edit your contacts.
 - **Ellipsis:** Contains additional Outlook views, such as Notes, Folders and Shortcuts, as well as Navigation Options.



Commented [IG2]:

The Navigation Bar at the bottom of the screen is how the different tools are organized in Outlook. It is always visible, no matter which tool you are using, so it is easy to use for switching between tools.

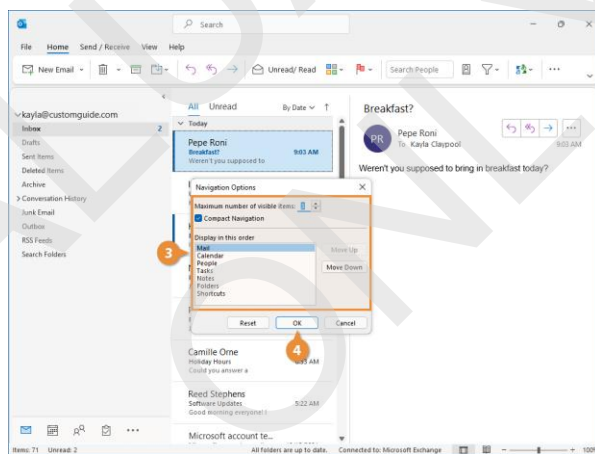
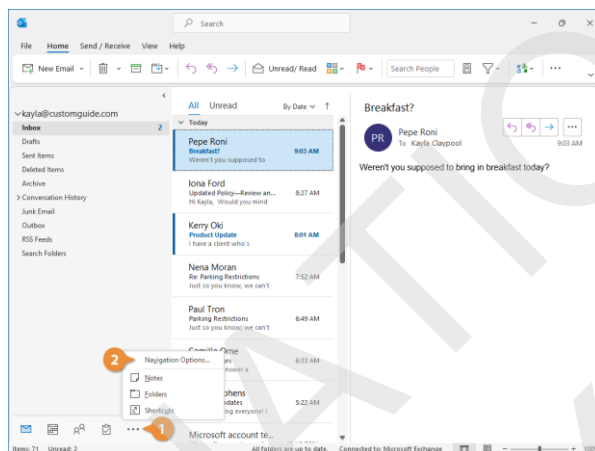
Commented [IG3]:

Click each link on the Navigation Bar to switch between the views, explaining as you go.

Customize the Navigation Bar

The Navigation Bar normally displays large text buttons for Mail, Calendar, People, and Tasks, but you can customize it to make it work for you.

- 1 Click the **ellipsis** button.
- 2 Select **Navigation Options**.
- 3 Make changes to the Navigation Bar.
 - Change how many links appear.
 - Reorder the links.
 - (Optional) Choose to compact the Navigation Bar.
- 4 Click **OK**.



Commented [IG4]:

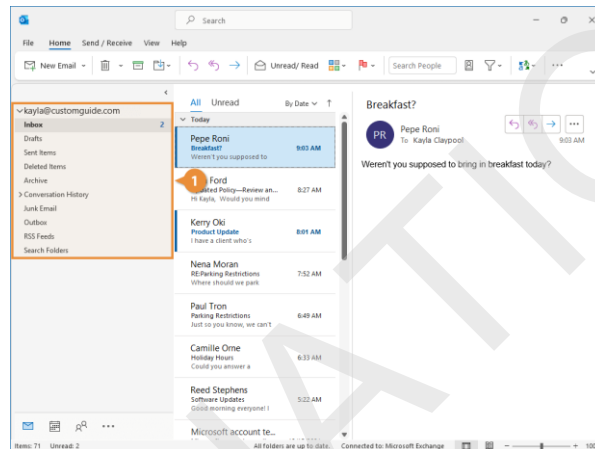
1. Click the ellipsis button.
2. Select Navigation Options.
3. Explain the different options available but don't make any changes now.
4. Click OK.

Use the Folder Pane

In addition to using the Navigation Bar, you can also use the Folder Pane on the left side of the Outlook window to navigate to the different folders in Outlook.

- 1 Click any folder in the Folder Pane.

Outlook opens the folder that you selected.



Commented [IG5]:

1. Click a folder in the Folder Pane.

Folder Pane	
Favorites	Add frequently used folders here for quick access.
Inbox	Contains all your recent incoming email messages.
Drafts	Stores draft messages that you haven't yet completed or sent.
Sent Items	Stores copies of messages you have sent.
Deleted Items	Works like the Windows Recycle Bin; where you can find deleted Outlook items.
Outbox	Temporarily stores any messages that you've composed and prompted to send, but have not been sent yet. Messages can appear here if you're experiencing a connectivity issue.
Junk Email	Contains messages that Outlook considers spam. You should check this folder periodically to check for incorrectly flagged messages.
RSS Subscriptions	Allows you to access content that you've subscribed to via RSS feed, such as news and blogs.
Search Folders	Provides quick access to color categorized messages, messages flagged for follow-up, messages with large attachments, and unread messages.

Items

In Outlook, an *item* is the basic element that holds information, such as an email message or calendar event. Items are used to send and view emails and organize information, such as tasks and contacts.

Commented [IG6]:

Email is the most common item associated with Outlook, but it also includes Calendar events, Contacts (people or groups), Tasks, and more. Explain the more common items to students.

Outlook Items		
	Email Message	Compose an email.
	Appointment	Add an appointment to your calendar.
	Meeting	Schedule and invite others to an appointment, or reserve resources such as a conference room.
	Contact	Enter information about a person, including their name, company, job title, and email address.
	Group	Create a collection of contacts that allows you to quickly send mass emails.
	Task	Enter to-do items that can be tracked until completion.

Search

If you have a lot of items in Outlook and want to find something specific, you can search for it. Search works the same everywhere in Outlook: Mail, Calendar, People, Tasks, or Notes.

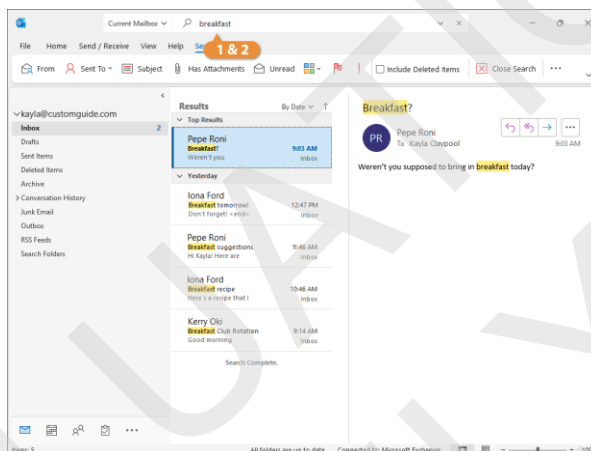
Search Items

Here's how to search for items in Outlook...

- 1 Click in the **Search** field.
- 2 Type your search term.

Outlook starts searching automatically and highlights your search term in the results.

Tip: To edit the search options, click the **Options** button on the Search tab, click **Search Tools**, and then select **Search Options**.



Commented [IG7]:

Preparation: Have at least one message in your inbox that contains the term you want to search for.

This feature works the same everywhere in Outlook: Mail, Calendar, Contacts, Tasks, Notes, Folder List and Journal. However, only items for that particular folder appear. For example, appointments do not appear in searches from Mail. Likewise, email messages do not appear in searches performed in the Calendar.

Commented [IG8]:

1. Click in the Search field.
2. Type a common search term.

Notice that the search returns results as soon as you start typing and that the Search tab on the ribbon appears as well.

Refine Search Results

Once you start searching, notice that the Search tab on the ribbon appears. This gives you options to adjust the search.

- 1 Click in the **Search** tab.
- 2 Click the **ellipsis** button on the Search tab to open the More Commands menu.
- 3 Select **Look in**.
- 4 Select a search scope in the Scope group.

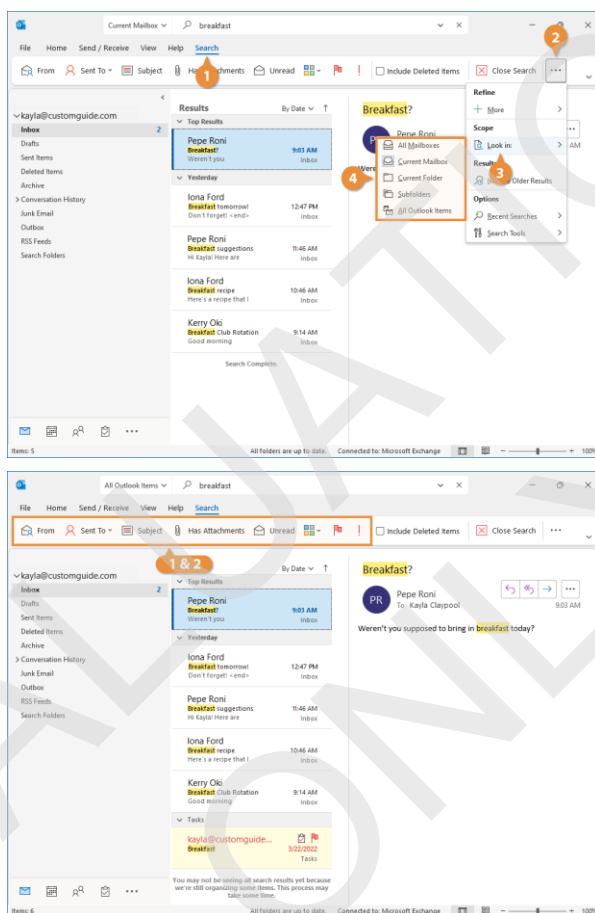
- **Current Folder:** Restricts the search to the currently selected folder.
- **Subfolders:** Searches the selected folder as well as any of its subfolders.
- **All Outlook Items:** Searches all Outlook Items, including Mail, Calendar, Contacts, and Tasks.

OR

- 1 Click one of the refining buttons on the Search tab.
- 2 Select or enter that option's criteria.

You are also given plenty of options for refining your search, including items in a specific category, messages from a certain contact, or items with attachments.

Tip: You may need to select additional information or text depending on how you refine your search.



Commented [IG9]:

1. Click in the Search tab.
2. Click the ellipsis button.
3. Select Look in.

Notice that now all the different types of items are shown in the results.

4. Select a search scope in the Scope group.

OR

1. Click one of the refining buttons on the Search tab.
2. Select or enter that option's criteria.

Search Tools (Mail)	
Current Mailbox	Expand your search to include all mail folders in this mailbox.
Current Folder	Only search within the current folder.
Subfolders	Expand your search to include all subfolders of the current folder.
All Outlook Items	Expand your search to include all Outlook items.
Include Older Results	Don't limit the number of results for this search to only the most recent. If you choose this option, the search might take longer.
From	Filter your search results to show only mail messages sent from a certain person.
Subject	Filter your search results based on the subject of the item.
Has Attachments	Filter your search results to only show items that have attachments.
Categorized	Filter your search results based on the category of an item.
This Week	Filter your search results based on when the mail message was received.
Sent To	Filter your search results to show items where a specific recipient appears in the To line of the mail message.
Unread	Filter your search results to show messages that are marked as unread.
Flagged	Filter your search results to only show items that are flagged.
Important	Filter your search results to only show mail messages that are marked with high importance.
More	Filter your search results based on more advanced criteria, such as the Cc line on mail messages or location on calendar items.
Recent Searches	Reuse a recent search.
Search Tools	Check the indexing status of your Outlook items, select which data files to search, or access other advanced search options.
Close Search	Close the current search.

Delete and Restore Items

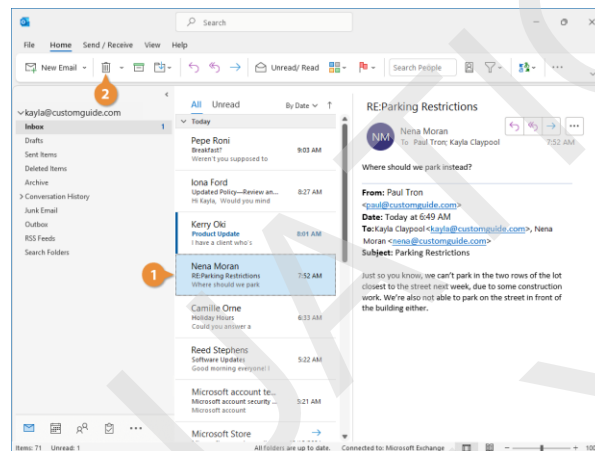
Many organizations limit how much space Outlook can take up. Deleting old emails and objects helps keep you within that limit.

Delete an Item

- 1 Select an item.
 - 2 Click **Delete**.
- Shortcut:** Press **Delete**.

The item is deleted and moved to the Deleted Items folder.

Tip: To permanently delete the messages in your trash folder, right-click the **Deleted Items** folder in the Navigation Pane and select **Empty Folder**.



Commented [IG10]:

Deleting items that are inconsequential and unnecessary is a good habit to get into. Otherwise, the size of your Outlook file can become excessively large.

Like searching, this feature works the same everywhere in Outlook: Mail, Calendar, Contacts, Tasks, Notes, Folder List and Journal

Preparation: Have a message in your inbox that you're willing to delete.

Commented [IG11]:

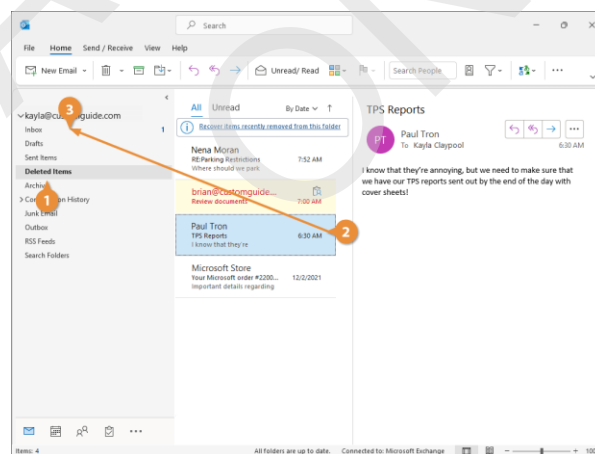
1. Select an email.
2. Click Delete.

Restore an Item

If you realize that you deleted something accidentally, you can usually retrieve it.

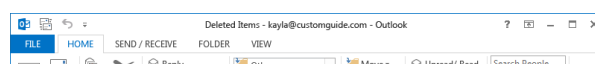
- 1 Click the **Deleted Items** folder from the Mail screen.
- 2 Select an item to restore.
- 3 Click and drag the item back to its original location.

The item is restored.



Commented [IG12]:

1. Click the Deleted Items folder to open it.
2. Select the email you just deleted.
3. Click and drag the email back to the original location.



Use the View Tab

Whether you're working with your Mail, Calendar, Contacts, or Tasks, you'll always have several views to choose from.

Commented [IG13]:

Whether you're working with your Mail, Calendar, Contacts, or Tasks, you'll always have several views to choose from. No matter what you are working with, you can always adjust the view from the View tab on the ribbon.

Change Views

- 1 Click the **View** tab on the ribbon.

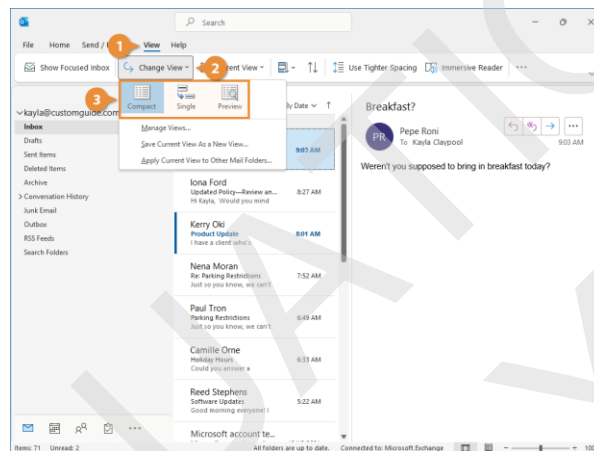
The commands available on the View tab will change depending on what you're working with, but you can always change views.

- 2 Click **Change View**.

Like the buttons on the ribbon, these options will vary.

- 3 Select a view.

- **Compact:** Displays brief details about the message in the message list and displays the Reading Pane.
- **Single:** Displays each message as one line in the message list and displays the Reading Pane.
- **Preview:** Displays each message as one line in the message list and hides the Reading Pane.



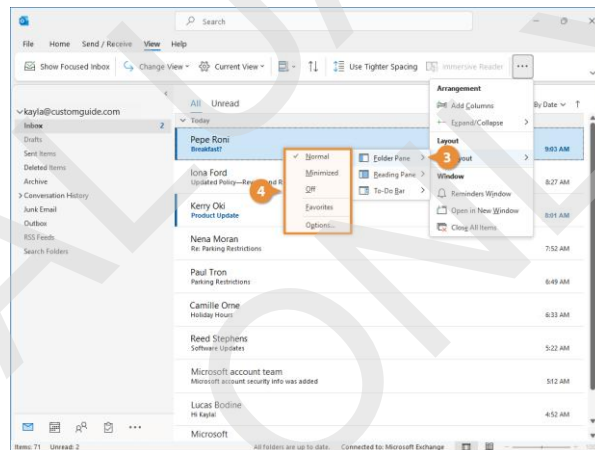
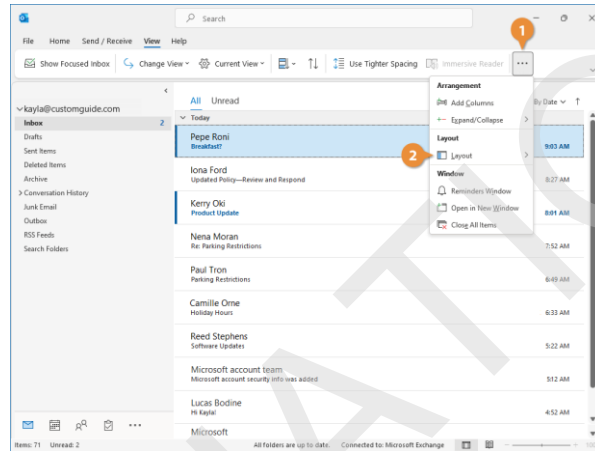
Commented [IG14]:

1. Click the View tab on the ribbon.
2. Click Change View.
3. Select a view.
4. Repeat the steps to test Single view and then return to Compact view.
5. Encourage students to switch to Calendar, People, or Tasks and use the same steps to test the different views before returning to Mail.

Folder Pane

The Folder Pane usually appears on the left, displaying a list of folders.

- 1 Click the **ellipsis** button on the ribbon to display the More Commands menu.
- 2 Select **Layout**.
- 3 Click the **Folder Pane** button on the View tab.
- 4 Select a Folder Pane option.
 - **Normal**: Displays the Folder Pane on the left.
 - **Minimized**: Hides the Folder Pane.
 - **Off**: Turns the Folder Pane off.
 - **Favorites**: Toggles whether Favorites are shown or not.
 - **Options**: Controls how many Folder Pane categories display and specifies the order they appear in.



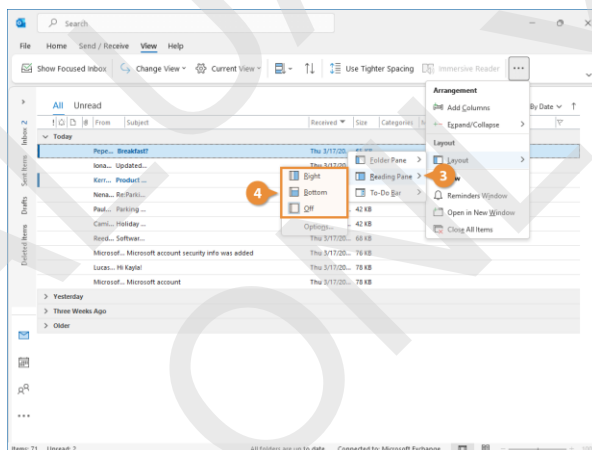
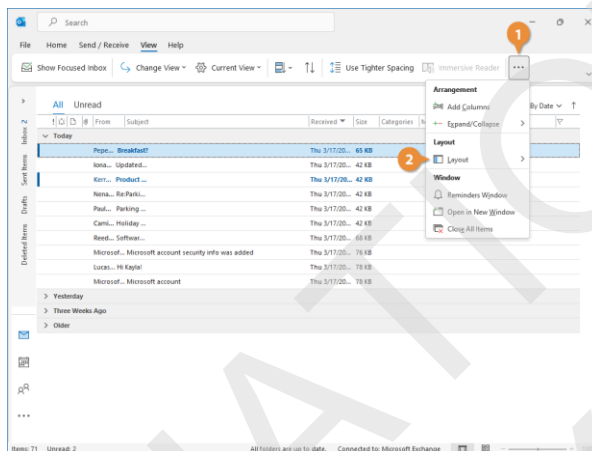
Commented [IG15]:

1. Click the ellipsis button on the ribbon.
2. Select Layout.
3. Click the Folder Pane button.
4. Select Minimized.
5. Repeat the steps to return to Normal.

Reading Pane

You can also adjust where the Reading Pane appears.

- 1 Click the **ellipsis** button on the ribbon to display the More Commands menu.
- 2 Select **Layout**.
- 3 Select **Reading Pane**.
- 4 Select a Reading Pane option.
 - **Right**: Displays the Reading Pane on the right.
 - **Bottom**: Displays the Reading Pane on the bottom.
 - **Off**: Turns off the Reading Pane.



Commented [IG16]:

1. Click the ellipsis button on the ribbon.
2. Select Layout.
3. Click the Reading Pane button.
4. Select Bottom.
5. Repeat the steps to return to Right.

To-Do Bar

There is also a To-Do Bar that you can choose to turn on and customize what displays.

1 Click the **ellipsis** button on the ribbon to display the More Commands menu.

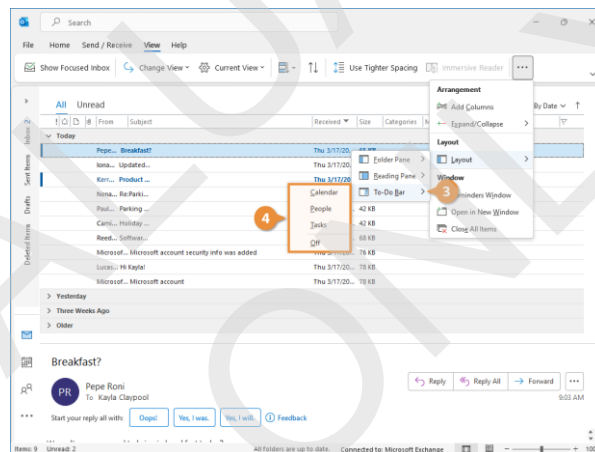
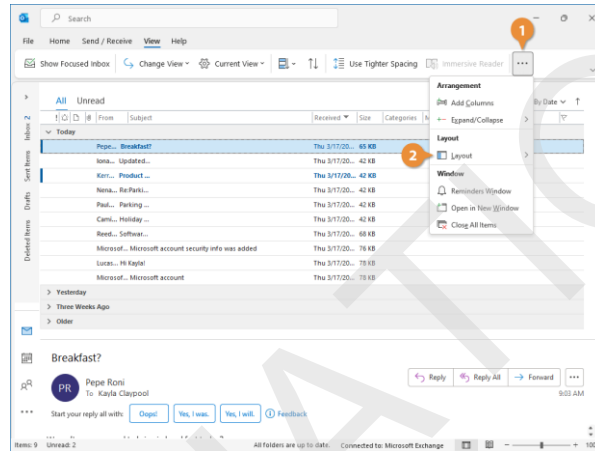
2 Select **Layout**.

3 Click **To-Do Bar**.

You can choose to display one or a combination of your Calendar, People, and Tasks list.

4 Select a To-Do Bar option.

- **Calendar:** Displays your calendar in the To-Do Bar.
- **People:** Displays your contacts in the To-Do Bar.
- **Tasks:** Displays your tasks in the To-Do Bar.
- **Off:** Hides the To-Do Bar.



Commented [IG17]:

1. Click the ellipsis button on the ribbon.
2. Select Layout.
3. Click the To-Do Bar button in the Layout group.
4. Select Tasks.
5. Repeat the steps to turn the To-Do Bar off.

View Tab (Mail)	
Change View	Change the current view to another view.
View Settings	Change the settings for the current view.
Reset View	Reset the current view back to its default setting.
Show as Conversations	Display messages grouped in conversations.
Conversation Settings	Adjust the settings for how conversations are displayed.
Message Preview	Preview a message without opening it.
Arrangement	Change the way messages are arranged in the inbox.
Reverse Sort	Reverse the sort order of the current view.
Add Columns	Choose which fields are show in this view.
Expand/Collapse	Expand or collapse the groups in the list.
Folder Pane	View Outlook's Folder Pane.
Reading Pane	View Outlook's Reading Pane.
To-Do Bar	View Outlook's To-Do Bar.
People Pane	View Outlook's People Pane.
Reminders Window	Open the window for Outlook's reminders.
Open in New Window	Open a new message window.
Close All Items	Close all items that are open.

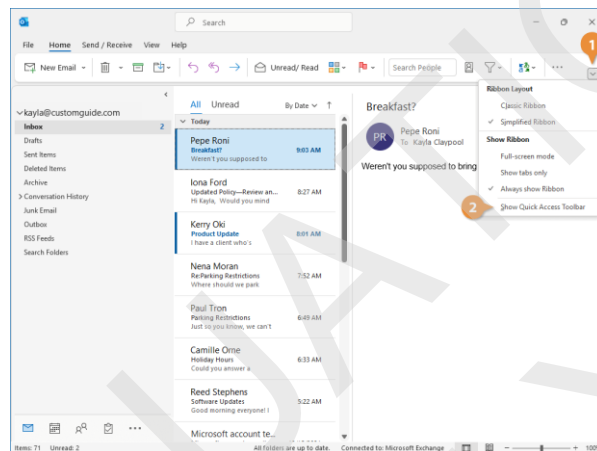
Ribbon Display Options

Outlook's ribbon has a few ways you can change its appearance. First, let's enable the Quick Access Toolbar, which is a toolbar that you can add frequently used commands to.

Display the Quick Access Toolbar

- 1 Click the **Ribbon Display Options** button.
- 2 Select **Show Quick Access Toolbar**.

The Quick Access toolbar appears below the ribbon.



Commented [IG18]:
Preparation: Begin in Mail view.

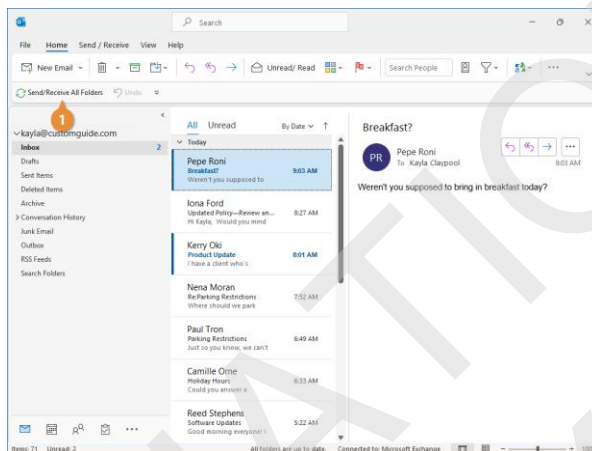
The Quick Access Toolbar appears above the File tab and provides easy access to the commands you use most frequently.

- Commented [IG19]:**
1. Click the Ribbon Display Options button.
 2. Select Show Quick Access Toolbar.

Use the Quick Access Toolbar

It includes several commands at first, including send/receive and undo.

- 1 Click a button on the Quick Access Toolbar to run that command.



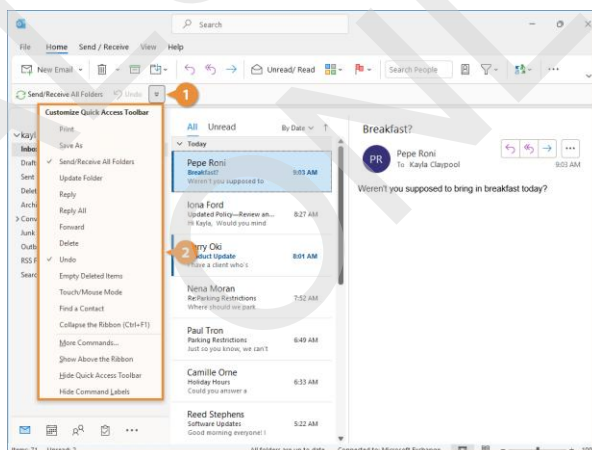
Commented [IG20]:

1. Click a button on the Quick Access Toolbar to run that command.

Add a Button to the Quick Access Toolbar

You can add frequently used commands to the Quick Access Toolbar.

- 1 Click the **Customize Quick Access Toolbar** button.
This list shows some common commands that you can add.
- 2 Select a command to add.



Commented [IG21]:

1. Click the Customize Quick Access Toolbar button.
2. Select the Print command.

Only a limited number of commands appear in the list. Next, we'll cover how to add more commands.

OR

2 Select **More Commands**.

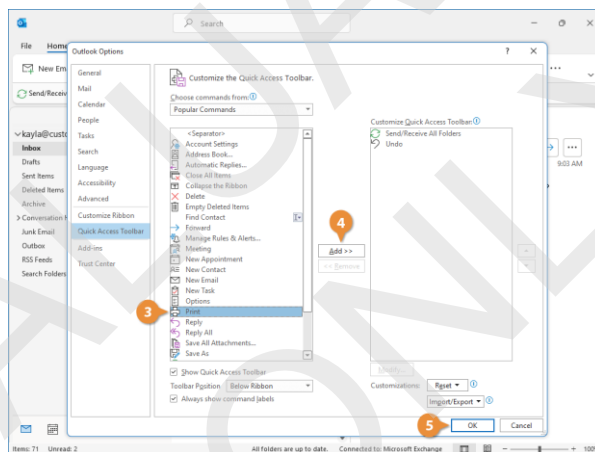
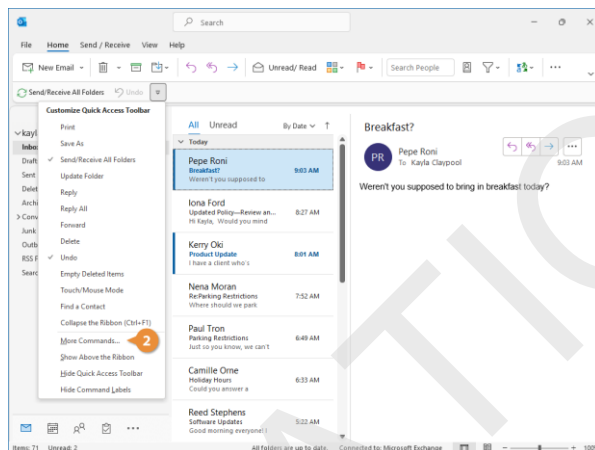
Here you'll find a much more comprehensive list of commands you can add.

3 Select a command.

4 Click the **Add** button.

5 Click **OK**.

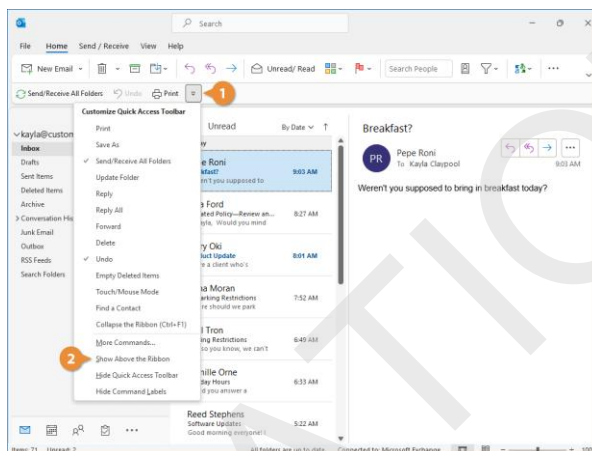
The command is added to the Quick Access Toolbar.



Change the Position of the Quick Access Toolbar

- 1 Click the **Customize Quick Access Toolbar** button.
- 2 Select **Show Above the Ribbon**.

The Quick Access Toolbar moves up to the top of the window.



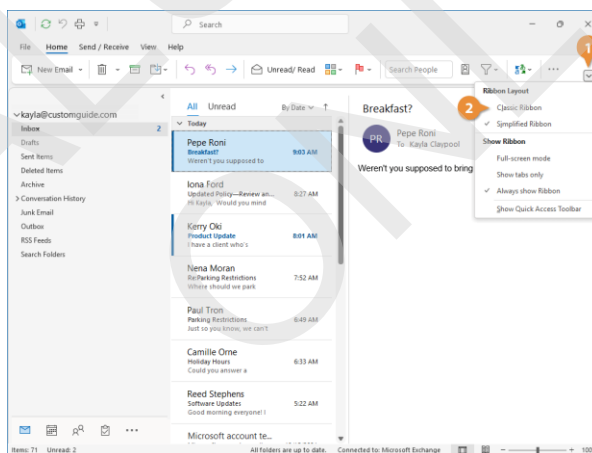
Commented [IG22]:

1. Click the Customize Quick Access Toolbar button.
2. Select Show Above the Ribbon.

Change the Ribbon's Appearance

Finally, you can also change the appearance of the ribbon itself. Outlook will have the simple ribbon at first, which is a single row of buttons with few button labels, but you can switch back to the classic ribbon from older versions of Outlook.

- 1 Click the **Ribbon Display Options** button.
- 2 Select **Classic Ribbon**.



Commented [IG23]:

1. Click the Ribbon Display Options button.
2. Select Classic Ribbon.

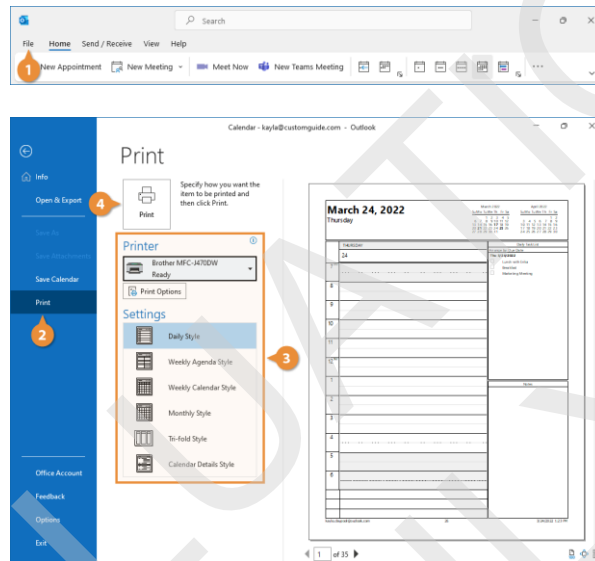
Print

You can print your Outlook items, including messages, contacts, and calendars.

Print Outlook Items

- 1 From the item you'd like to print, click the **File** tab.
- 2 Select **Print**.
- 3 Select the desired print options:
 - **Printer** where you want to send the items to be printed.
 - **Print Options** including number of copies, print layout, and print range.
 - **Settings** for the print or page layout.
- 4 Click **Print**.

The item is sent to the printer.



Commented [IG24]:

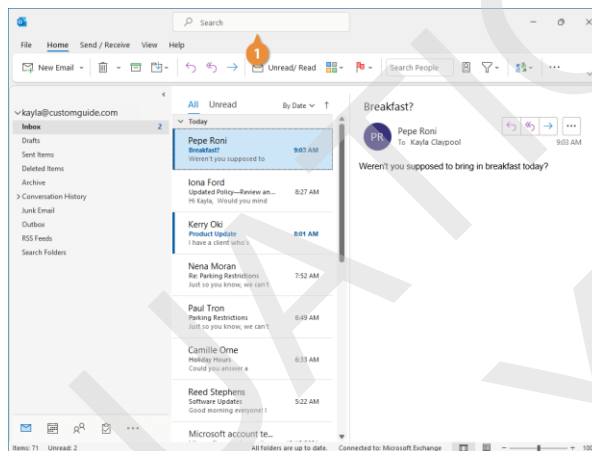
1. Click the File tab from the item you'd like to print.
2. Select Print.
3. Select one of the available options.
4. Click the Print button.

Help

If you don't know how to do something in Outlook, you can consult Outlook's Help files to find the answers. Help can answer your questions, offer tips, and provide help for all of Outlook's features.

The Tell Me Field

- 1 Click in the **Search** field.
 - 2 Type what you want to do.
- Any actions that match your search phrase appear listed under the **Actions** heading.
- 3 Select the command you were looking for.



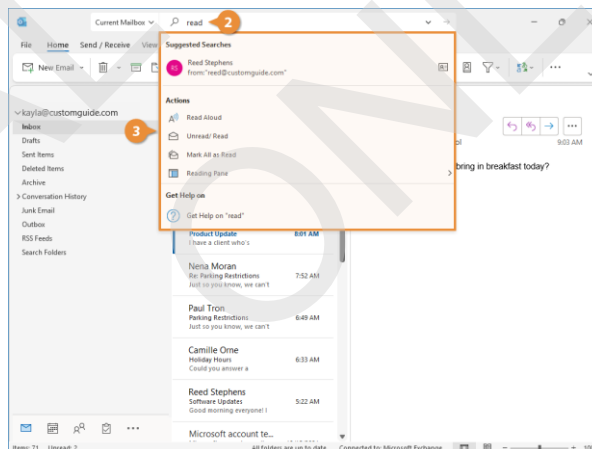
Commented [IG25]:

Encourage students to consult Outlook's Help files to find the answers to their questions. Help can answer questions, offer tips, and provide help for all of Outlook's features.

Searching the help files is the fastest way to find what you're looking for, but you can also browse different topics using the links.

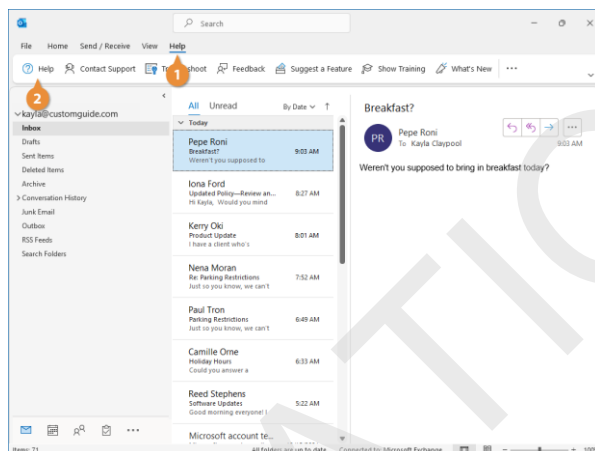
Commented [IG26]:

1. Click in the Search field.
2. Type a common search term.
3. Select the command you were looking for.



The Help Pane

- 1 Click the **Help** tab.
- 2 Click the **Help** button.
- 3 Type a help topic and click the **Search** button.
- 4 Select a help topic.



Commented [IG27]:

1. Click the Help tab.
2. Click the Help button.
3. Type Schedule a meeting in the search field.
4. Select the first result.

