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**OUTLOOK 2019
AND 365**

TEACHUCOMP, INC.

...it's all about you

OUTLOOK 2019 AND 365

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INTRODUCTION AND OVERVIEW

Welcome to TeachUcomp, Inc.'s Mastering Outlook Made Easy tutorial. This tutorial introduces the student to Microsoft Outlook, one of the most popular scheduling/email programs available today. This tutorial gives the student with little or no knowledge of Outlook a firm skills base using Outlook.

Outlook is a terrific program to learn, as the skills learned in Outlook can save valuable time and money by automating, organizing and structuring the communications, scheduling and task management capabilities of your company.

With Outlook you can track appointments, schedule meetings, organize notes, and send and receive email. It is an electronic information management system that helps you organize and share information and communicate with others.

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CHAPTER 1-

GETTING ACQUAINTED WITH OUTLOOK

1.1- THE OUTLOOK ENVIRONMENT

1.2- THE TITLE BAR

1.3- THE RIBBON

1.4- THE QUICK ACCESS TOOLBAR

1.5- TOUCH MODE

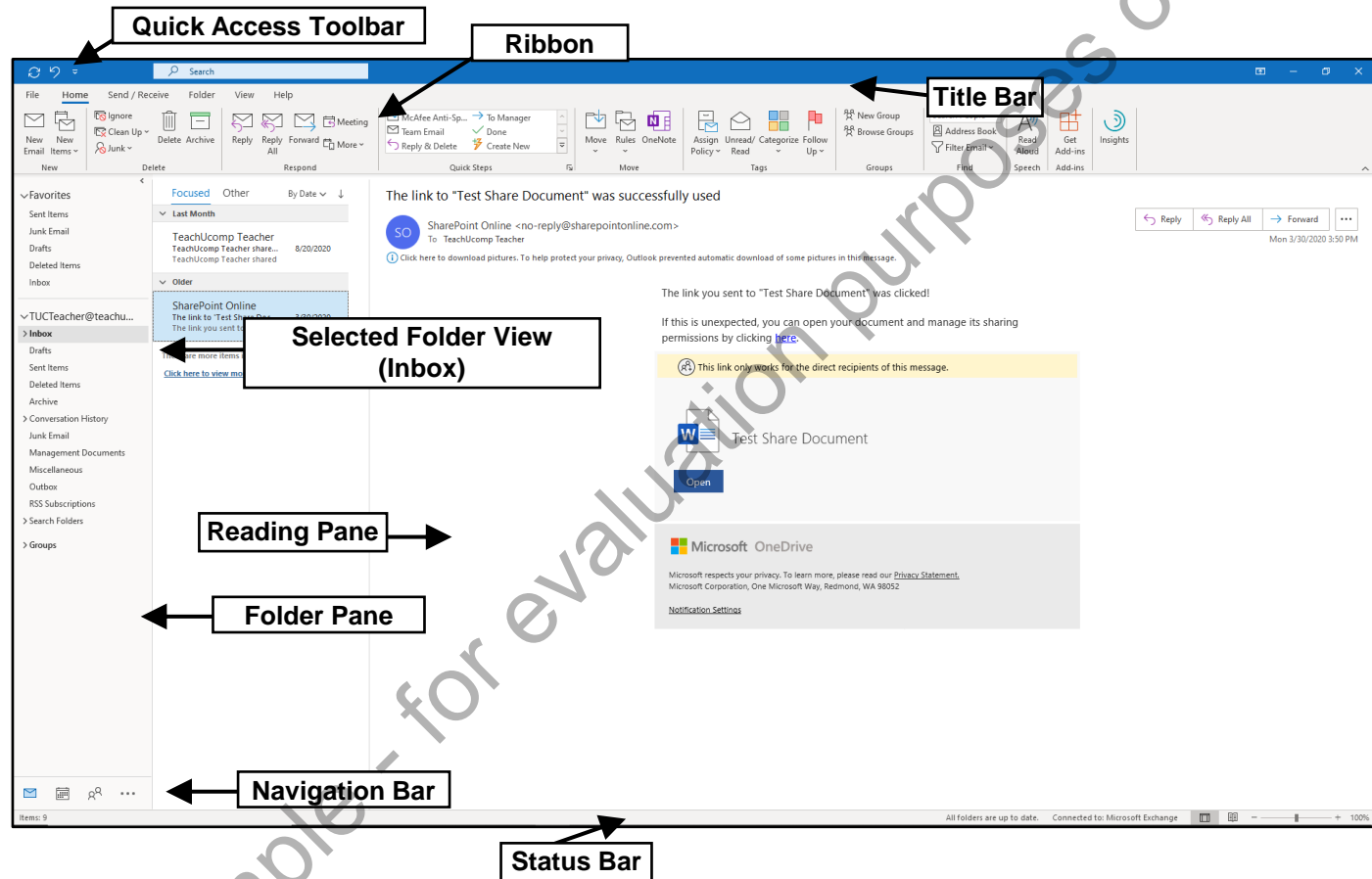
1.6- THE NAVIGATION BAR, FOLDER PANE, READING PANE, AND TO-DO BAR

Sample - for evaluation purposes only!

GETTING ACQUAINTED WITH OUTLOOK

1.1- The Outlook Environment:

Welcome to the Outlook environment. The layout of elements in Outlook is streamlined and simplified, so the program is intuitive and easy to use for both new and old Outlook users. Outlook provides an easy-to-use Ribbon at the top of the application that lets you perform the tasks in the different sections of the program. The first step in learning how to use Outlook is familiarizing yourself with the names, locations, and functions of the elements in the Outlook environment. The lessons in this chapter show you these elements, so you can acquaint yourself with the Outlook environment.



1.2- The Title Bar:

The Title Bar in Outlook spans the very top of the screen. The “Quick Access Toolbar” appears at its far-left end. By default, two buttons appear here: “Send and Receive All” and “Undo.” You can add and remove buttons to customize the Quick Access Toolbar, which we will examine in a separate lesson of this chapter. Newer versions of Outlook show the Microsoft Search Bar in the middle of the Title Bar. Older versions of Outlook show the name of the currently-selected Outlook folder and the current email account.

The far-right end of the Title Bar shows another button group. It contains the buttons: “Ribbon Display Options,” “Minimize,” “Maximize/Restore Down,” and “Close.” These buttons change the display of the Outlook application window. Clicking the “Ribbon Display Options” button shows you options for

GETTING ACQUAINTED WITH OUTLOOK

1.2- The Title Bar- (cont'd.):

changing the Ribbon's display in a drop-down menu. You can click the choice of Ribbon display you prefer in this drop-down menu to set its appearance in Outlook. Clicking the "Minimize" button sends the application window down to the Windows Taskbar. You can view it later by clicking its entry in the Windows Taskbar.

The next button is a "toggle" button that toggles between two window modes: "Maximize" and "Restore Down." Clicking the "Maximize" button enlarges the application window to full-screen size. The button then toggles its name to "Restore Down." Clicking the "Restore Down" button gives you a smaller screen version that remains visible on your desktop. You can click and drag within the Title Bar in this window mode to move it. You can place your mouse pointer over the border of this window until it turns into a two-headed arrow and then click and drag to resize it in this window mode. Finally, you can click the "Close" button to exit Outlook and close the window.

1.3- The Ribbon:

The Ribbon lets users perform tasks on the items and folders in Outlook. The Ribbon in Outlook for Microsoft 365 can appear as either a simplified Ribbon or a classic Ribbon. Outlook for Microsoft 365 (formerly Office 365) uses a simplified Ribbon, by default. The simplified Ribbon doesn't show the names of button groups on each tab of the Ribbon and shows fewer buttons than the classic Ribbon. To switch the Ribbon between the simplified Ribbon and the classic Ribbon if using Outlook for Microsoft 365, click the "Switch Ribbon" button, which looks like a small upward-pointing or downward-pointing arrow in the lower-right corner of the Ribbon. For other versions of Outlook and most other Office applications, clicking this same button collapses or expands the Ribbon to show or hide the buttons groups on the tabs of the Ribbon. This tutorial uses the classic version of the Ribbon to help new users see more commands in the Ribbon and find them more easily within the button groups.

The classic Ribbon is divided into named tabs of command button groups. You can click a tab name in the Ribbon to see its available command button groups. Within each command button group are the buttons, drop-downs, spinner boxes, and other selection items you use to perform tasks.

To access more advanced options for some button groups, you can often click the "Dialog Box" launcher button in the lower-right corner of some button groups on the currently displayed, or "active," tab in the Ribbon. Doing this then opens a dialog box of advanced options available for the button group.

When you create different types of items in Outlook, like email, tasks, or meetings, you create them in separate windows that open. These item windows also contain separate Ribbons that have different primary tabs that relate to the type of item you create. In addition to the primary tabs available in the Ribbon, special "contextual" tabs also appear in the Ribbon if you insert different types of objects when creating an Outlook item. Contextual tabs appear, for example, when you select either a picture, table, diagram, drawing, or chart when you create an email. The tabs and command button groups that appear in the contextual tabs contain functions related to the selected type of object. You can often make the contextual tabs disappear by clicking away from the selected object to deselect it. For selected attachments in received emails, however, you can often click the "Back to message" link that appears at the top of the email to make the contextual tabs disappear and deselect the selected attachment, too.

GETTING ACQUAINTED WITH OUTLOOK

1.4- The Quick Access Toolbar:

The Quick Access toolbar appears above the Ribbon, by default. You can easily add buttons to this toolbar for the functions you use most. To add a button from the Ribbon to the Quick Access toolbar, right-click the command button or function in the Ribbon to add. Then choose the “Add to Quick Access Toolbar” command in the pop-up menu that appears. To remove a button you have added to the Quick Access toolbar, right-click the button to remove in the Quick Access toolbar. Then select the “Remove from Quick Access Toolbar” command in the pop-up menu that appears.

Alternatively, to more thoroughly customize the Quick Access toolbar, click the “Customize Quick Access Toolbar” button at the right end of the Quick Access toolbar. Then select the “More Commands...” choice from its drop-down menu to then open the “Quick Access Toolbar” section of the “Outlook Options” window.

At the right side of the window are two sets of command button listings. The listing at the far-right side of the panel is the set of command buttons currently shown in the Quick Access toolbar. The order in which the commands appear in this list from top to bottom is the order they appear from left to right in the Quick Access toolbar.

To the left of this panel is a listing of commands you can add to the Quick Access toolbar. You can select which commands appear in this list by selecting a command grouping to display from the “Choose commands from:” drop-down above the list.

To add a command to the Quick Access toolbar from this list, click the command to add from the choices in the left list. Then click the “Add>>” button between the lists to move the selected command into the Quick Access toolbar list to the right. To remove a command from the Quick Access toolbar list to the right, first click it to select it. Then click the “Remove” button between the lists to remove it.

To change the order in which the command buttons appear in the Quick Access toolbar, select a command in the right list. Then click the “Up” or “Down” arrow buttons to the right of this list. To save and apply your changes after customizing the Quick Access Toolbar, click the “OK” button in the lower-right corner of the window.

1.5- Touch Mode:

Because of the increased use of tablets, Outlook contains a mode that gives you easier access to the buttons and commands in the Ribbon and Quick Access toolbar. This mode is called touch mode. When you enter touch mode in Outlook, you enlarge the Ribbon and Quick Access toolbar. You also add extra space around the buttons and commands in the Ribbon and Quick Access toolbar. These changes let you more easily access these buttons on a touch-based tablet.

To enable touch mode, click the small drop-down arrow at the right end of the Quick Access toolbar to display a drop-down menu of the most commonly-used commands. Click or tap the “Touch/Mouse Mode” command in the drop-down menu to add that button to the Quick Access toolbar.

To then enable or disable touch mode in Outlook, click or tap the “Touch/Mouse Mode” button in the Quick Access toolbar. From the drop-down menu that then appears, select the mode to use: “Mouse” or “Touch.” When “Touch” mode is enabled, the buttons in the Ribbon and Quick Access toolbar are larger and have more space surrounding them onscreen. You can select the “Mouse” choice to toggle touch mode off, restoring the default size of the buttons onscreen.

GETTING ACQUAINTED WITH OUTLOOK

1.6- The Navigation Bar, Folder Pane, Reading Pane, and To-Do Bar:

To navigate to the different sections in Outlook and show their contents, you can use the Navigation Bar. The Navigation Bar was called the “Navigation Pane” in older versions of Outlook. The Navigation Bar appears at the bottom of the Outlook window and shows the categories of Outlook items, like “Mail,” “Calendar” and “People, for example. When you click an icon in the Navigation Bar, the items in that category section then appear in the Folder Pane at the far-left side of the Outlook window.

To change the view of the Navigation Bar in Outlook, click the “View” tab of the Ribbon. Then click the “Folder Pane” drop-down button in the “Layout” button group. Then select the “Options...” command from the drop-down menu that appears to open the “Navigation Options” dialog box. Alternatively, to open the “Navigation Options” dialog box, click the “More” dots at the right end of the Navigation Bar. Then select the “Navigation Options...” command from the pop-up menu that appears.

By default, the Navigation Bar appears compact and contained at the bottom of the Folder Pane. To instead make the Navigation Bar span the bottom of the Outlook window, uncheck the “Compact Navigation” checkbox. Then set the “Maximum number of visible items:” using the spinner arrows in the box. The maximum number of items you can show in the Navigation Bar is eight (8). To change the order in which the items appear, select an item in the “Display in this order” list. Then click the “Move Up” or “Move Down” buttons to the right. To apply any changes when finished, click the “OK” button.

The Navigation Bar contains icons for the different sections of Outlook. You can click the icon of one of these sections to view that section in the adjacent Folder Pane. For example, if you click the “Mail” icon, your “Inbox” folder and other email folders then appear in the Folder Pane.

If you click a folder in the Folder Pane, its contents then appear to the right. For example, clicking the “Inbox” folder in the Folder Pane shows its emails to the right. To adjust the view of the Folder Pane, click the “View” tab in the Ribbon. Then click the “Folder Pane” button in the “Layout” button group. Then select either the “Normal,” “Minimized” or “Off” choice. For the “Mail” section, you can also select the “Favorites” command in this drop-down menu to toggle its display in the Folder Pane on or off.

All selected sections in Outlook also provide access to a Reading Pane. This pane shows the contents of the currently selected section item in a separate pane. To set the display of the Reading Pane for the currently selected section, click the “View” tab in the Ribbon. Then click the “Reading Pane” drop-down button in the “Layout” button group. Then choose where to show the Reading Pane in this section by choosing either “Right,” “Bottom,” or “Off” in the drop-down menu. To change the universal settings for all sections that show the Reading Pane, select the “Options...” choice from the “Reading Pane” drop-down button’s drop-down menu. Then check the desired checkboxes in the “Reading Pane” dialog box to enable a feature or uncheck them to disable a feature.

If enabled, the “To-Do Bar” appears at the right side of the Outlook window. This bar does not appear by default in Outlook. Within a selected section of Outlook, the To-Do Bar can show calendar info, contact info, and task info. To set the display of the To-Do Bar for the current section, click the “View” tab in the Ribbon. Then click the “To-Do Bar” button in the “Layout” button group. Then select either the “Calendar,” “People,” or “Tasks” commands in the drop-down menu that appears to toggle that info on or off in the To-Do Bar. Selecting the “Off” command toggles all info off and hides the To-Do Bar.

ACTIONS-

GETTING ACQUAINTED WITH OUTLOOK

THE TITLE BAR:

1. The “Quick Access Toolbar” appears at the far-left end of the Title Bar. By default, you will find two buttons shown here: “Send and Receive All” and “Undo.”
2. Newer versions of Outlook show the Microsoft Search Bar in the middle of the Title Bar. Older versions of Outlook show the name of the currently-selected Outlook folder and the current email account.
3. At the far-right end of the Title Bar is another button group with four buttons named “Ribbon Display Options,” “Minimize,” “Maximize/Restore Down,” and “Close.” These commands affect the display of the Outlook application window.
4. **To change the Ribbon’s appearance in Outlook**, click the “Ribbon Display Options” button to show the options for changing its display in a drop-down menu.
5. Then click the Ribbon display choice you prefer in this drop-down menu to set its appearance.
6. **To send the application window to the Windows Taskbar**, click the “Minimize” button.
7. **To view it again later**, click its entry in the Windows Taskbar.
8. The next button is a “toggle” button that toggles between two window modes: “Maximize” and “Restore Down.”
9. **To make the Outlook application window appear full-screen if it is not full-screen**, click the “Maximize” button. The button then toggles its name to “Restore Down.”
10. **To change the Outlook application window to a smaller screen when it is maximized**, click the “Restore Down” button.
11. **To move it onscreen in this window mode**, click and drag within its Title Bar.
12. **To resize the window in this window mode**, place your mouse pointer over the border of this window until it turns into a two-headed arrow.
13. Then click and drag to resize it in this window mode.
14. **To close the application window**, click the “Close” button to exit Outlook.

THE RIBBON:

1. The Ribbon lets you perform tasks on the items and folders in Outlook.
 2. The Ribbon in Outlook for Microsoft 365 can appear as either a simplified Ribbon or a classic Ribbon.
 3. **To switch the Ribbon between the simplified Ribbon and the classic Ribbon if using Outlook for Microsoft 365**, click the “Switch Ribbon” button, which looks like a small upward-pointing or downward-pointing arrow in the lower-right corner of the Ribbon.
 4. **For other versions of Outlook and most other Office applications**, clicking this same button collapses or expands the Ribbon to show or hide the buttons groups on the tabs of the Ribbon.
 5. This tutorial uses the classic version of the Ribbon to help new users see more commands in the Ribbon and find them more easily within the button groups.
 6. **To see the different commands in the classic Ribbon**, click a tab to view the different buttons, drop-down, and commands within its button groups.
 7. **If available, to see advanced options for a specific button group**, click its “Dialog Box” launcher button in its lower-right corner. Only some button groups have advanced options available.
 8. When you create different types of items in Outlook, like email, tasks, or meetings, you create them in separate windows that open.
 9. These item windows also contain separate Ribbons that have different primary tabs that relate to the type of item you create.
- (cont’d.)

ACTIONS-

GETTING ACQUAINTED WITH OUTLOOK

THE RIBBON- (CONT'D.):

10. In addition to the primary tabs available in the Ribbon, special “contextual” tabs also appear in the Ribbon if you insert different types of objects when creating an Outlook item. Contextual tabs appear, for example, when you select either a picture, table, diagram, drawing, or chart when you create an email.
11. The tabs and command button groups that appear in the contextual tabs contain functions related to the selected type of object.
12. **To make the contextual tabs disappear**, click away from the selected object to deselect it.
13. **However, to make the contextual tabs disappear and deselect a selected attachment for selected attachments in received emails**, click the “Back to message” link that appears at the top of the email.

THE QUICK ACCESS TOOLBAR:

1. **To add a button from the Ribbon to the Quick Access toolbar**, right-click the command button or function in the Ribbon to add.
2. Then choose the “Add to Quick Access Toolbar” command in the pop-up menu that appears.
3. **To remove a button you have added to the Quick Access toolbar**, right-click the button to remove in the Quick Access toolbar.
4. Then select the “Remove from Quick Access Toolbar” command in the pop-up menu that appears.
5. **Alternatively, to more thoroughly customize the Quick Access toolbar**, click the “Customize Quick Access Toolbar” button at the right end of the Quick Access toolbar.
6. Then select the “More Commands...” choice from its drop-down menu to then open the “Quick Access Toolbar” section of the “Outlook Options” window.
7. At the right side of the window are two sets of command button listings.
8. The listing at the far-right side of the panel is the set of command buttons currently shown in the Quick Access toolbar. The order in which the commands appear in this list from top to bottom is the order they appear from left to right in the Quick Access toolbar.
9. To the left of this panel is a listing of commands you can add to the Quick Access toolbar.
10. To select which commands appear in this list, select a command grouping to display from the “Choose commands from:” drop-down above the list.
11. **To add a command to the Quick Access toolbar from this list**, click the command to add from the choices in the left list.
12. Then click the “Add>>” button between the lists to move the selected command into the Quick Access toolbar list to the right.
13. **To remove a command from the Quick Access toolbar list to the right**, first click it to select it.
14. Then click the “Remove” button between the lists to remove it.
15. **To change the order in which the command buttons appear in the Quick Access toolbar**, select a command in the right list.
16. Then click the “Up” or “Down” arrow buttons to the right of this list.
17. **To save and apply your changes after customizing the Quick Access Toolbar**, click the “OK” button in the lower-right corner of the window.

ACTIONS-

GETTING ACQUAINTED WITH OUTLOOK

TOUCH MODE:

1. **To enable touch mode**, click the “Customize Quick Access Toolbar” button at the right end of the Quick Access Toolbar to display a listing of the most used commands.
2. Then click or tap the “Touch/Mouse Mode” command in the drop-down menu to add that button to the Quick Access Toolbar.
3. **To enable or disable touch mode**, click or tap the “Touch/Mouse Mode” button within the Quick Access Toolbar and select the mode you prefer to use: “Mouse” or “Touch.”
4. When “Touch” mode is enabled, the buttons within the Ribbon and Quick Access Toolbar appear larger and with more space surrounding them onscreen.
5. Select the “Mouse” choice to toggle touch mode off, restoring the default size of the buttons onscreen.

THE NAVIGATION BAR, FOLDER PANE, READING PANE, AND TO-DO BAR:

1. **To navigate to the different sections in Outlook and show their contents**, use the Navigation Bar. The Navigation Bar appears at the bottom of the Outlook window and shows the categories of Outlook items, like “Mail,” “Calendar” and “People, for example.
 2. When you click an icon in the Navigation Bar, the items in that category section then appear in the Folder Pane at the far-left side of the Outlook window.
 3. **To change the view of the Navigation Bar in Outlook**, click the “View” tab of the Ribbon.
 4. Then click the “Folder Pane” drop-down button in the “Layout” button group.
 5. Then select the “Options...” command from the drop-down menu that appears to open the “Navigation Options” dialog box.
 6. **Alternatively, to open the “Navigation Options” dialog box**, click the “More” dots at the right end of the Navigation Bar.
 7. Then select the “Navigation Options...” command from the pop-up menu that appears.
 8. By default, the Navigation Bar appears compact and contained at the bottom of the Folder Pane.
 9. **To instead make the Navigation Bar span the bottom of the Outlook window**, uncheck the “Compact Navigation” checkbox.
 10. Then set the “Maximum number of visible items:” using the spinner arrows in the box. The maximum number of items you can show in the Navigation Bar is eight (8).
 11. **To change the order in which the items appear**, select an item in the “Display in this order” list.
 12. Then click the “Move Up” or “Move Down” buttons to the right.
 13. **To apply any changes when finished**, click the “OK” button.
 14. The Navigation Bar contains icons for the different sections of Outlook. You can click the icon of one of these sections to view that section in the adjacent Folder Pane.
 15. If you click a folder in the Folder Pane, its contents then appear to the right.
 16. **To adjust the view of the Folder Pane**, click the “View” tab in the Ribbon.
 17. Then click the “Folder Pane” button in the “Layout” button group.
 18. Then select either the “Normal,” “Minimized” or “Off” choice.
 19. **For the “Mail” section**, you can also select the “Favorites” command in this drop-down menu to toggle its display in the Folder Pane on or off
 20. All selected sections in Outlook also provide access to a Reading Pane. This pane shows the contents of the currently selected section item in a separate pane.
- (cont'd.)

ACTIONS-

GETTING ACQUAINTED WITH OUTLOOK

THE NAVIGATION BAR, FOLDER PANE, READING PANE, AND TO-DO BAR- (CONT'D.):

21. **To set the display of the Reading Pane for the currently selected section**, click the “View” tab in the Ribbon.
22. Then click the “Reading Pane” drop-down button in the “Layout” button group.
23. Then choose where to show the Reading Pane in this section by choosing either “Right,” “Bottom,” or “Off” in the drop-down menu.
24. **To change the universal settings for all sections that show the Reading Pane**, select the “Options...” choice from the “Reading Pane” drop-down button’s drop-down menu.
25. Then check the desired checkboxes in the “Reading Pane” dialog box to enable a feature or uncheck them to disable a feature.
26. **If enabled**, the “To-Do Bar” appears at the right side of the Outlook window. This bar does not appear by default in Outlook. Within a selected section of Outlook, the To-Do Bar can show calendar info, contact info, and task info.
27. **To set the display of the To-Do Bar for the current section**, click the “View” tab in the Ribbon.
28. Then click the “To-Do Bar” button in the “Layout” button group.
29. Then select either the “Calendar,” “People,” or “Tasks” commands in the drop-down menu that appears to toggle that info on or off in the To-Do Bar.
30. Selecting the “Off” command toggles all info off and hides the To-Do Bar.

EXERCISES-

GETTING ACQUAINTED WITH OUTLOOK

Purpose:

1. To find and use the basic objects in Outlook.
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Exercises:

1. Open your Outlook application.
2. Find the Ribbon at the top of the application window.
3. If you are using Outlook for Microsoft 365 (formerly Office 365) and also viewing the simplified Ribbon, click the "Switch Ribbon" button in the lower-right corner of the Ribbon to show the classic Ribbon, which we will use for this tutorial. You can always click the same button again to switch back to the simplified Ribbon later, if you prefer to use it for your everyday Outlook usage once you learn the button options in the Ribbon of Outlook.
4. Find the Navigation Bar.
5. Click the "Mail" icon in the Navigation Bar to view your mail folders at the left side of the window.
6. Click the "Inbox" folder within the Mail folders to view the messages in your inbox in the pane to the right.
7. Click the "Calendar" icon in the Navigation Bar to view your calendar.
8. Click the "X" button in the upper-right corner of the application window to exit Outlook.