LESSON 4

Introduction to Outlook

After completing this lesson, you will be able to:

- *Start Outlook.*
- *Navigate within Outlook.*
- *Use the Outlook bar.*
- *Use the Folder List.*
- *Use the Office Assistant.*

Until personal computers became popular, managing work-related data meant recording and tracking information on paper stored in several different places. For example, a businessperson might record appointments and meetings in a day planner, while keeping phone number and addresses in a card file. Brief reminders were jotted down on small sticky notes. Other important business information was stored in files and folders in a desk drawer or filing cabinet.

Although many people have grown accustomed to these organizational approaches, Microsoft Outlook provides a better way to store, track, and integrate business and personal information. With Outlook, you can store and access important information in a single location on a personal computer. For example, you can use Outlook's electronic calendar to record meetings and appointment dates and times. Outlook can even sound an alarm or display a reminder on your computer screen when you have an appointment. You can record brief reminders to yourself on Outlook notes, which resemble sticky notes, and these notes can be displayed on your screen at any time for easy reference. You can use Outlook to record your daily or weekly tasks and check them off as you complete them. Outlook has an address book in which you can record phone numbers, addresses, e-mail addresses, and other information about your business and personal contacts. You can even view Web sites directly from Outlook, as well as open other Microsoft Office documents. The power of Outlook lies in knowing how to use all of its capabilities to organize information efficiently.

In this lesson, you will tour many of the elements of Outlook to become familiar with it. You will start Outlook and view different **folders**, which are containers for programs and files. You will also take a closer look at the **Outlook bar** and the **shortcuts** that you find there. Click a shortcut, displayed as an icon on the Outlook bar, to display the contents of the corresponding folder or file. Finally, you will learn how to use the Help system in Outlook to find answers to your questions about using Outlook as a powerful tool to organize your data.

No practice files are required to complete the exercises in this lesson.

Starting Outlook

As with all Microsoft Office programs, there are several different ways to open Outlook. One method is to click the Start button on the Windows taskbar, point to All Programs, and click Microsoft Outlook. This option is always available, even if you are using another Microsoft Office program.

You can also add the Outlook icon to your desktop, then simply double-click the icon to start Outlook. Using the icon is faster and easier than using the Start button on the Windows taskbar. To add an Outlook icon to your desktop, click the Start button on the Windows taskbar, point to All Programs, hold down the Ctrl key, and drag the Microsoft Outlook icon onto your desktop. This process adds the icon to your desktop without removing it from the Start menu.

The first time you start Outlook, the Inbox folder is displayed in the Outlook window. Use the main window to view and access all Outlook components.

In this exercise, you start Microsoft Outlook.

1   On the Windows taskbar, click the Start button, point to All Programs, and click Microsoft Outlook.
    Outlook starts.

2   If necessary, click the Maximize button in the upper-right corner of the Outlook window.
   The Outlook window expands to fill the entire screen.

> You will learn more about the Inbox folder later in this lesson.

> If you are opening Outlook for the first time, the Office Assistant (the animated paper clip character) might be displayed. To close the Office Assistant, right-click the paper clip, and click Close on the shortcut menu that appears. You will learn more about the Office Assistant later in this lesson.
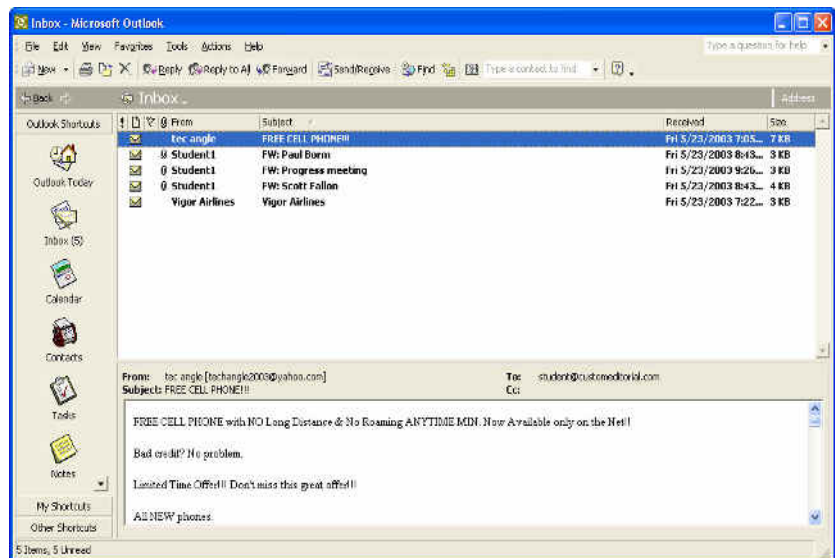
Navigating Within Outlook

The Outlook window contains buttons, icons, menu commands, and other elements that enable you to navigate within Outlook and use Outlook effectively. The contents of this window change as you click buttons and icons and choose options.
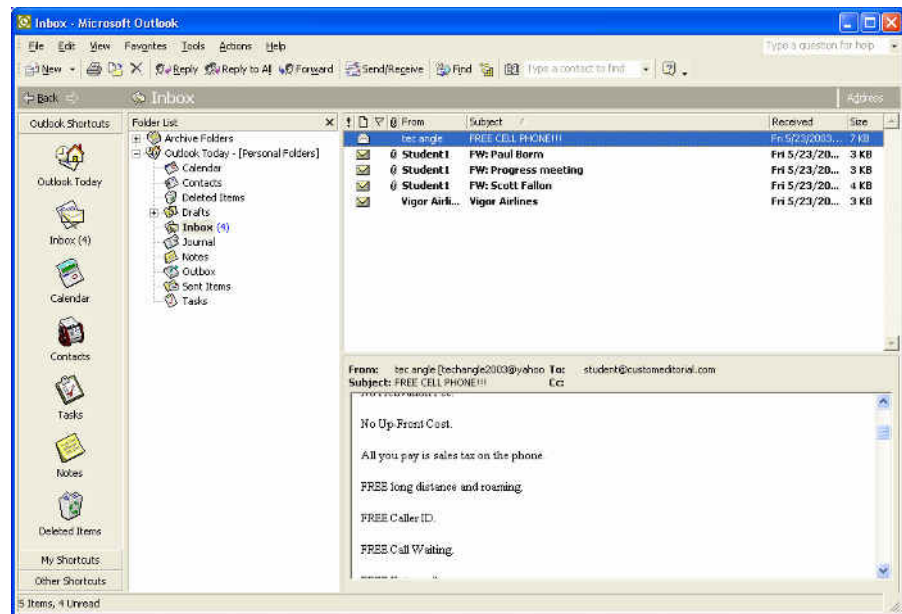
The table on the following page describes the basic functions of the elements displayed in the Outlook window.

| *Element*	*Description*
Title bar	Identifies the application currently running (in this case, Outlook) and the active Outlook folder.
Menu bar	Lists the names of the menus available in the current Outlook window. A menu displays a list of commands the application can perform.
Standard toolbar	Displays buttons that enable you to quickly access commonly used commands for the application.
Outlook bar	Displays shortcuts to the contents of folders available in Outlook, such as the Inbox and Calendar. The Outlook bar is expandable and contains two or three groups of shortcuts: Outlook Shortcuts, My Shortcuts, and Other Shortcuts (also called Other). To hide or display the Outlook bar, click the Outlook bar option on the View menu.
Folder List	Displays a list of available Outlook folders. Click a folder in the list to view the folder's contents. To display the **Folder List**, select the Folder List option on the View menu. To view the Folder List briefly, click the name of the current folder in the Folder Banner. The first time you use Outlook, you will have one personal folder in the Folder List for each component on the Outlook bar. If your organization uses Microsoft Exchange Server, you might also see public folders that can be accessed by other network users. Use the Folder List to move items from one folder to another, create folders within folders, and much more.
Folder Banner	Displays the name of the open folder. If the Folder List is not displayed, click the name of the folder in the **Folder Banner** to view the list of available folders.
Items	Information displayed in Outlook. For example, in the Inbox, each message is an item; in Contacts, the contact record is an item.
Shortcut	An icon on the Outlook bar. Click a shortcut and Outlook displays the contents of the corresponding folder or file.
Status Bar	As you use the Outlook bar or Folder List to switch to different Outlook folders, the Status bar displays the number of items that are in a specific folder. For example, when you open Contacts, the Status bar displays the number of contacts in the folder.
Preview Pane	A section of the Inbox window that displays the text of the selected message. The **Preview Pane** is displayed by default in the Outlook window. To hide it, deselect Preview Pane on the View menu.

Using Personalized Menus

Outlook has a default feature that enables you to personalize your menus. The first time you open a menu in Outlook, you see a short menu that displays the commands that are most frequently used by Outlook users. You also see two small arrows at the bottom of the menu. These arrows are used to expand the menu to display more options. You can expand the menu in two ways: click the arrows at the bottom of the menu or wait a few seconds for the menu to expand on its own. When you click a command on the expanded menu, Outlook immediately displays this command on the short menu. Outlook continues to adapt. Over time, if you stop using this command, it is removed from the short menu. The command will be displayed on the expanded menu.
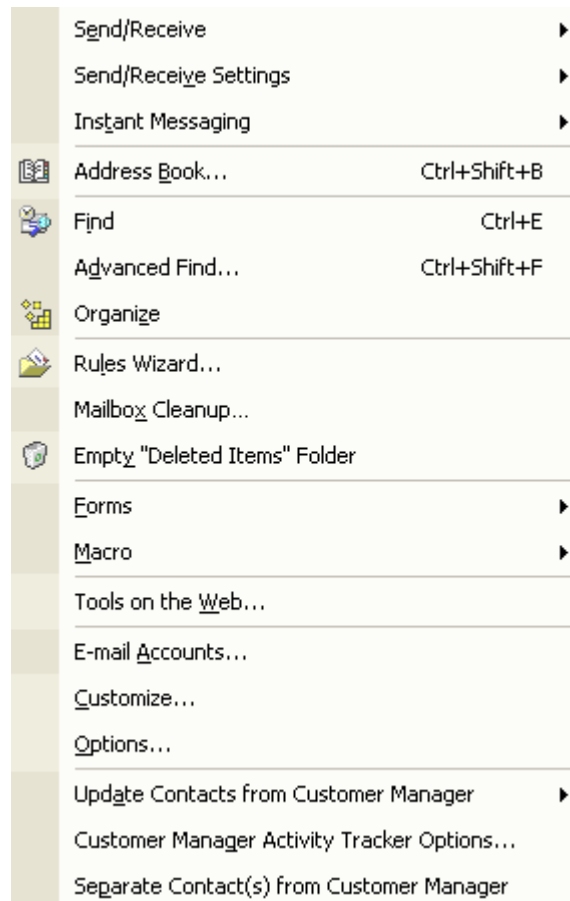
If you prefer to see the expanded menus instead of the short menus, open the Tools menu, click Customize, click the Options tab, select the Always show full menus check box, and click Close.

In this exercise, you navigate through different areas of the Outlook window.

1   On the menu bar, click Tools.
   The short Tools menu is displayed.
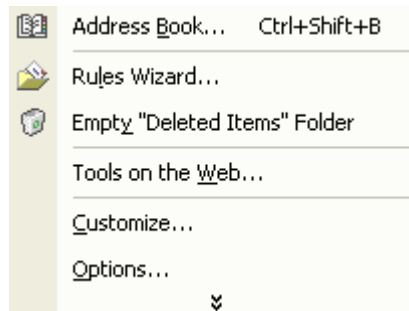
2   Click anywhere outside the menu.
      The menu closes.

3   On the menu bar, click Tools.
      The short Tools menu is displayed.

4   Click the double arrows at the bottom of the short Tools menu.
      The expanded Tools menu is displayed, as shown in the illustration on the following page.

	Send/Receive	▶
	Send/Receive Settings	▶
	Instant Messaging	▶
📖	Address Book...	Ctrl+Shift+B
🔍	Find	Ctrl+E
	Advanced Find...	Ctrl+Shift+F
📇	Organize	
📂	Rules Wizard...	
	Mailbox Cleanup...	
🗑	Empty "Deleted Items" Folder	
	Forms	▶
	Macro	▶
	Tools on the Web...	
	E-mail Accounts...	
	Customize...	
	Options...	
	Update Contacts from Customer Manager	▶
	Customer Manager Activity Tracker Options...	
	Separate Contact(s) from Customer Manager	

> If possible, all the Outlook shortcuts are visible in the Outlook bar at the same time. If the size of your monitor or your display settings prevents this, up and down arrows enable you to scroll the Outlook bar.

5 On the bottom-right side of the Outlook bar, click the down arrow.
The Outlook bar scrolls down.

6 On the upper-right side of the Outlook bar, click the up arrow.
The Outlook bar scrolls up.

7 On the Folder Banner, click the folder name *Inbox*.
The Folder List is displayed, as shown in the illustration on the following page.
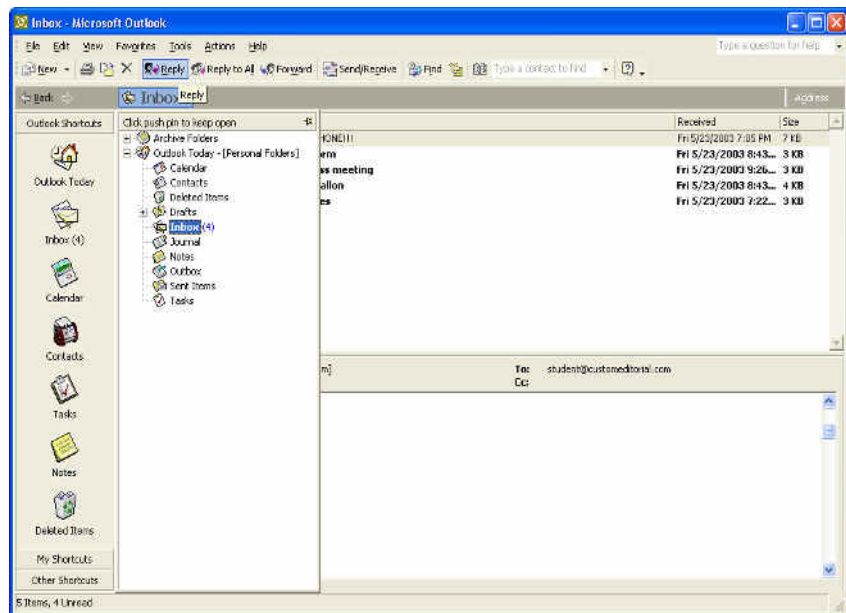
The Folder List closes if you click outside the Folder List window. To keep the Folder List open, click the Push Pin button.

Even though the Inbox, Contacts, Tasks, and other Outlook features are called "folders," you will sometimes see them referred to by name alone (for example, "the Inbox") rather than by name and identifier (for example, "the Inbox folder").

8   Click outside the Folder List.
The Folder List is no longer displayed.

Using the Outlook Bar

The Outlook bar displays icons that represent the components available in Outlook. Each icon is also a shortcut to the contents of frequently used folders, such as the Inbox, Calendar, and Contacts folders. When you click one of the shortcuts, the contents of the folder are displayed. For example, if you click the Calendar shortcut, the content of the Calendar folder—a calendar containing your appointments—is displayed.

Outlook uses the term *folder* to describe how Outlook's functions and common items are divided within Outlook. For example, the Inbox folder contains e-mail messages that you have received and enables you to create messages within the Inbox folder. The Tasks folder contains a list of activities that you need to perform and enables you to create tasks. You cannot create a task in the Inbox folder or create a message in the Tasks folder. When you view the folders in Outlook, you'll notice that the appearance and options differ in each folder. For that reason, you can think of each folder as a separate program within Outlook even though the functions work together without a seam.

The Outlook bar contains three groups: Outlook Shortcuts, My Shortcuts, and Other Shortcuts (or simply Other). The name of each group name is displayed on its own bar. Each group contains shortcuts to specific folders.

The Outlook Shortcuts group contains seven shortcuts to the most frequently used folders in Outlook: Outlook Today, Inbox, Calendar, Contacts, Tasks, Notes, and Deleted Items. The My Shortcuts group contains several standard folders: Drafts, Outbox, Sent Items, Journal, and Outlook Update. The Other Shortcuts (or Other) group contains folders that also appear in Windows

Explorer: My Computer, My Documents, and Favorites. These folders enable you to access a file while you're using Outlook, eliminating the need to open Windows Explorer. You can simply open the file from within Outlook.

The Outlook folders are described in the following table.

Shortcuts can be moved from one group to another on the Outlook bar, removed, or added. Therefore, shortcuts might be located in a different group on your computer. If a shortcut does not appear in the specified group, look for it in a different group.

Folder	*Group*	*Description*
Outlook Today	Outlook Shortcuts	Provides a snapshot of your day by listing your appointments, identifying tasks, and displaying the number of available e-mail messages
Inbox	Outlook Shortcuts	Stores the e-mail messages that you receive
Calendar	Outlook Shortcuts	Displays a calendar and appointment book to track your schedule
Contacts	Outlook Shortcuts	Stores the names, phone numbers, addresses, and other information about the people with whom you communicate
Tasks	Outlook Shortcuts	Displays a to-do list of your personal and business tasks
Notes	Outlook Shortcuts	Stores information on electronic sticky notes, such as ideas, grocery lists, or directions
Deleted Items	Outlook Shortcuts	Temporarily stores the items that you delete until you permanently delete them
Drafts	My Shortcuts	Temporarily saves messages that have not been completed
Outbox	My Shortcuts	Holds completed e-mail messages until they are sent to recipients
Sent Items	My Shortcuts	Stores copies of the e-mail messages that you send
Journal	My Shortcuts	Displays a history of your Microsoft Office activities in a timeline format
Outlook Update	My Shortcuts	Accesses the Internet to find the latest additions or patches provided by Microsoft for the Outlook application

| My Computer	Other Shortcuts	Provides access to other drives, folders, and files on your computer or network
My Documents	Other Shortcuts	Provides access to documents or files created in other programs
Favorites	Other Shortcuts	Stores shortcuts to important folders and Web addresses

In this exercise, you use the Outlook bar to view different Outlook folders.

1 On the Outlook bar, click the Outlook Today shortcut.
The contents of the Outlook Today folder are displayed.

> You will learn how to use the Inbox to send and receive e-mail messages in the next lesson.
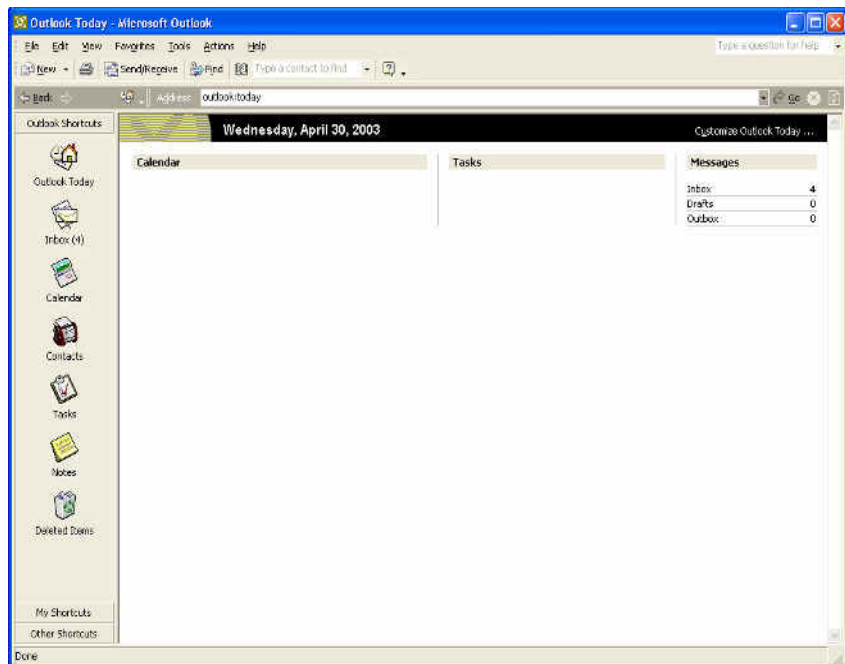
2 On the Outlook bar, click the Calendar shortcut.
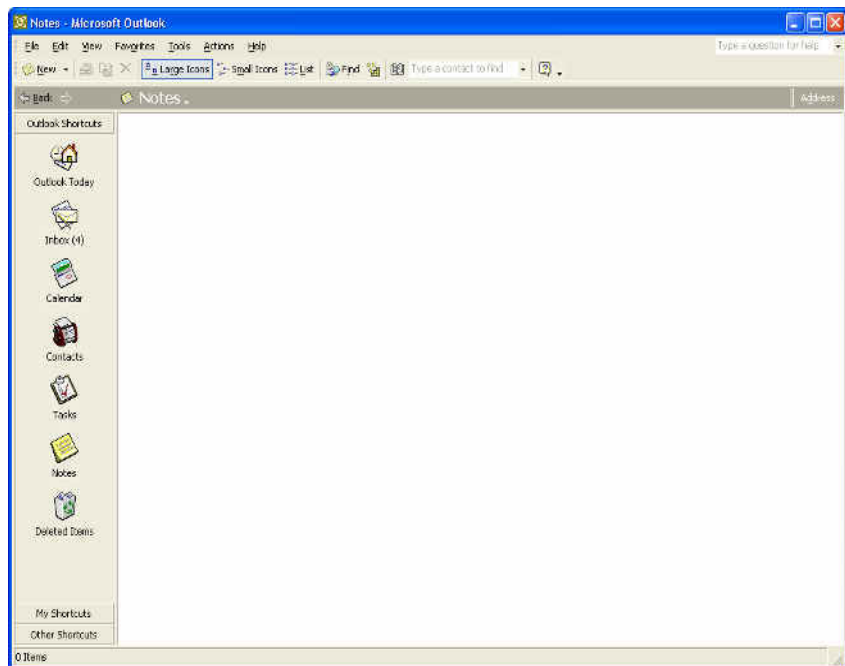The contents of the Calendar folder are displayed.
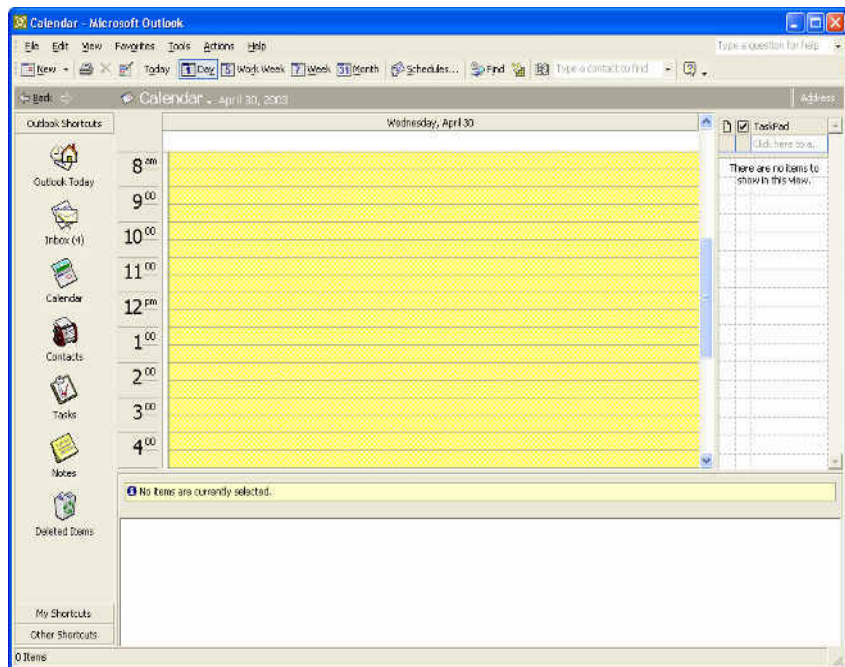
3   On the Outlook bar, click the Contacts shortcut.

The contents of the Contacts folder are displayed.
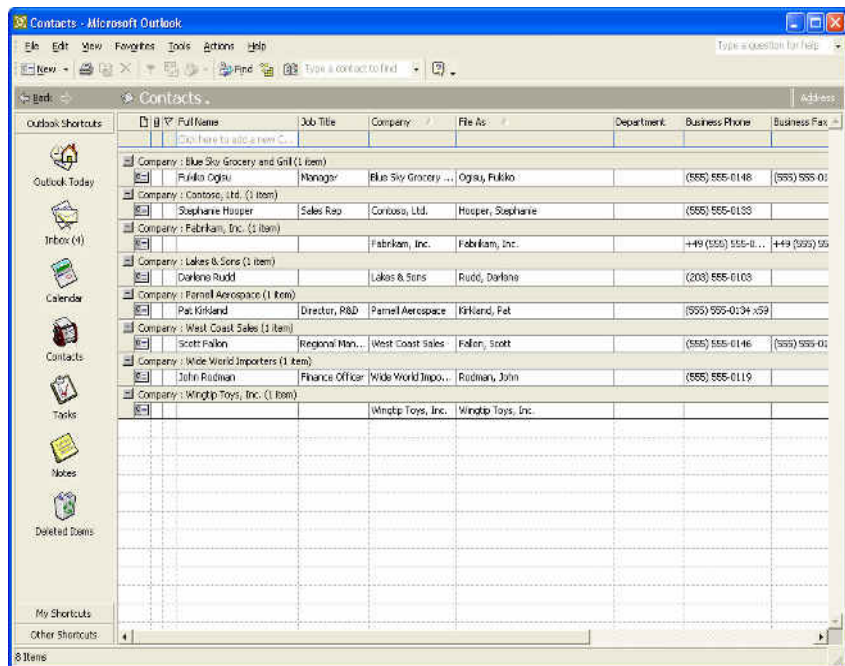
4   On the Outlook bar, click the Tasks shortcut.

The contents of the Tasks folder are displayed.
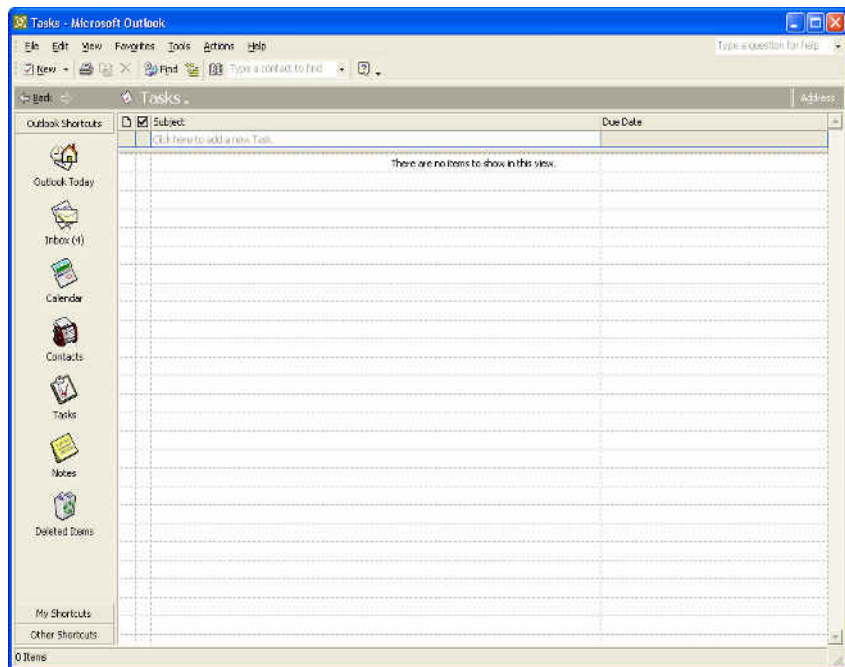
5　On the Outlook bar, click the Notes shortcut.

The contents of the Notes folder are displayed.

6 On the Outlook bar, click the down arrow if the Deleted Items shortcut isn't visible. Click the Deleted Items shortcut in the Outlook bar.

The contents of the Deleted Items folder are displayed. You can drag any item from any Outlook folder onto the Deleted Items shortcut on the Outlook bar to remove the item from a folder and store it temporarily in the Deleted Items folder.

> Items are not removed from your hard drive until you select Empty "Deleted Items" Folder on the Tools menu.
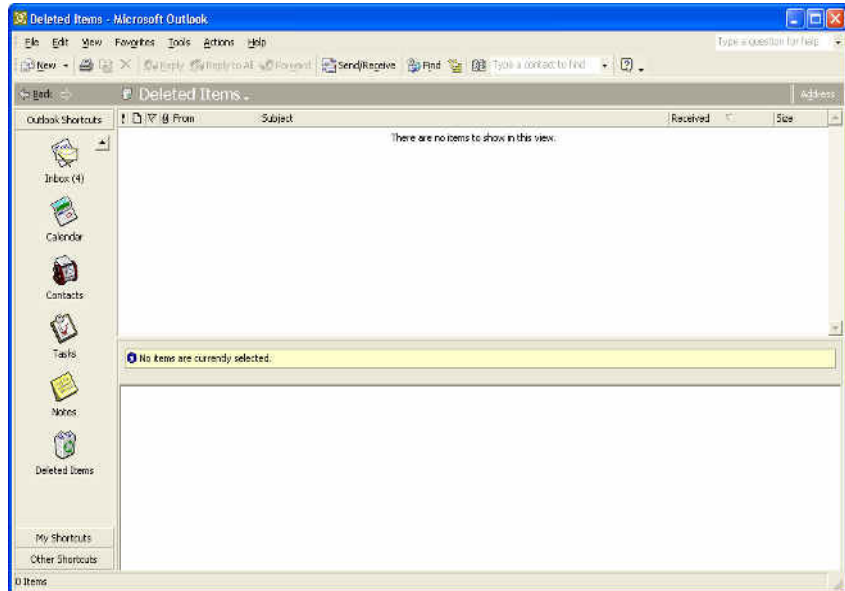
7 On the Outlook bar, click the My Shortcuts group bar.

The shortcuts available in the My Shortcuts group are displayed.
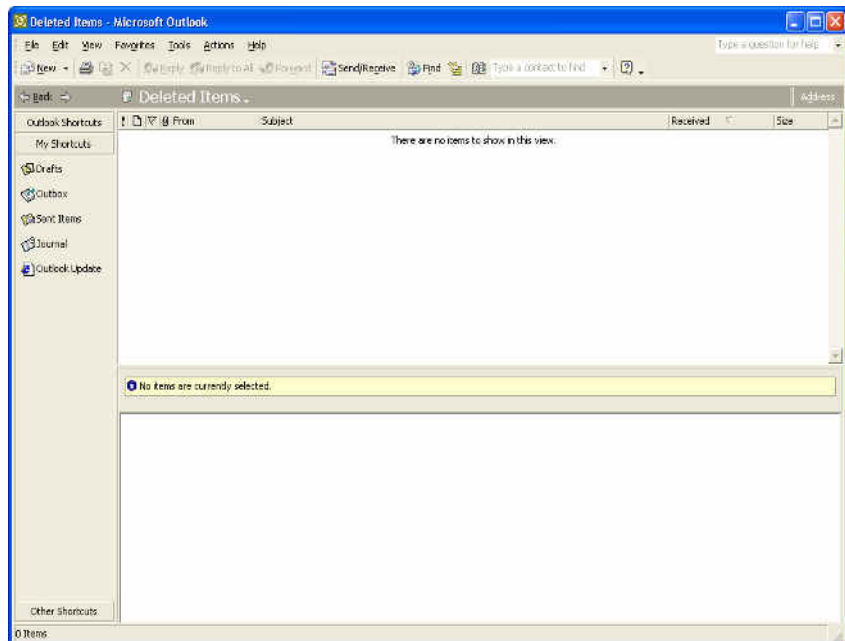
8   On the Outlook bar, click the Other Shortcuts group bar (or Other group bar).

The shortcuts available in the Other Shortcuts (or Other) group are displayed.
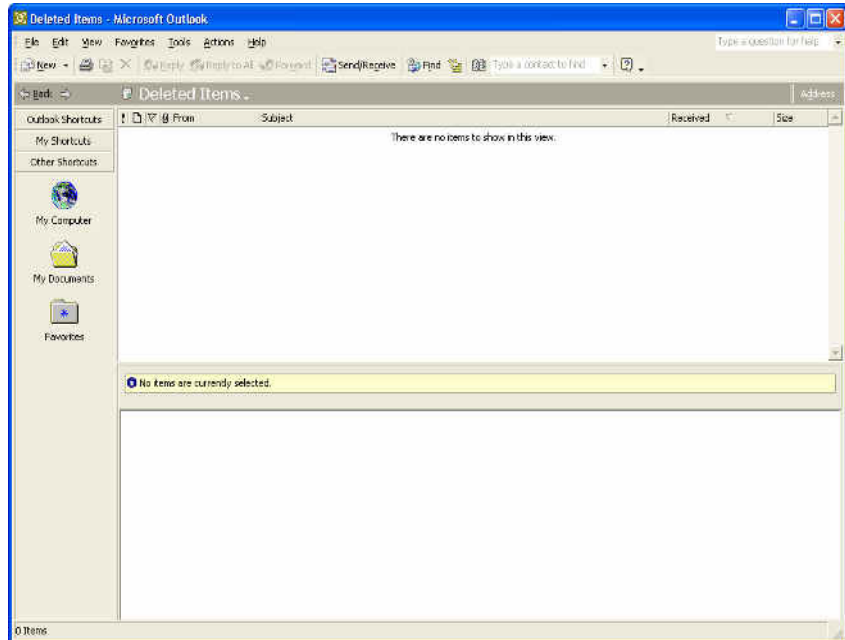
9   On the Outlook bar, click the Outlook Shortcuts group bar.

The shortcuts available in the Outlook Shortcuts group appear again.

You can add frequently
visited folders or Web sites to
the Favorites folder.

Using the Favorites Folder

The Favorites folder is a shortcut to Web sites and other folders that you
frequently use or don't want to forget. The Favorites folder is located in the
Other Shortcuts (or Other) group.
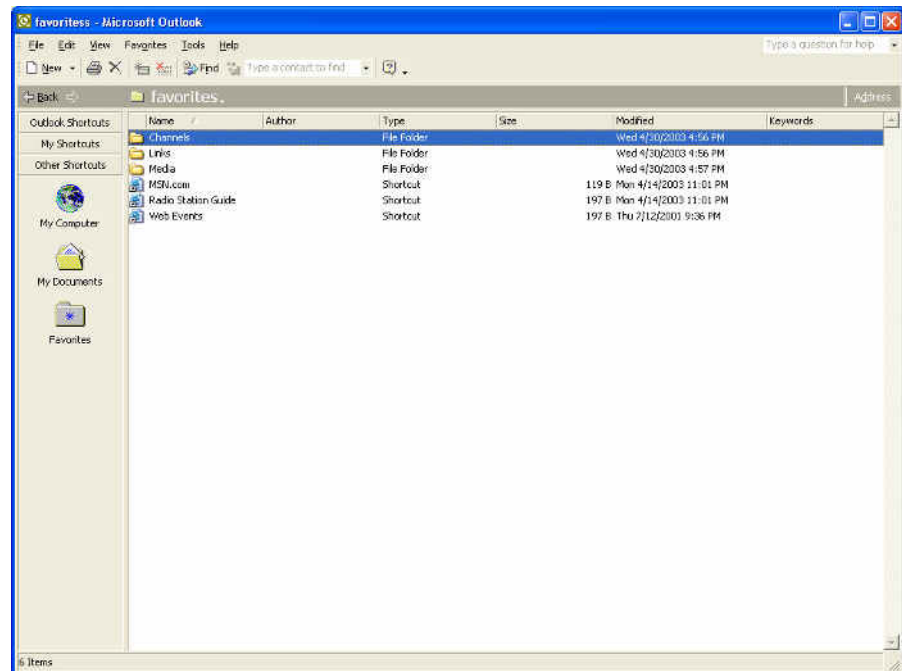
To add a Web site to the list of Favorites when you are connected to the
Internet, follow these steps:

1   On the Windows taskbar, click the Start button and select Internet
        Explorer.

2   In the Address box, type the address of the Web site you want to
        add and press Enter.

3   After the Web page is displayed, select Add to Favorites on the
        Favorites menu.

4   Click OK to accept the default title line as the name of the Favorite.

OR

Type a new name and click OK.

To add a folder to the list of Favorites, follow these steps:

1   On the Windows taskbar, click the Start button, point to All
        Programs, and click Windows Explorer.

2   Click the folder you want to add, click Add to Favorites on the
Favorites menu, and click OK to accept the default title line as the
name of the Favorite.

To access a favorite Web site or folder from Outlook, follow these steps:

1   On the Outlook bar, click the Other Shortcuts group bar (or Other
group bar).

2   Click the Favorites folder, and double-click the name of the Web
site or folder that you want to open.

Using the Folder List

You can also view Outlook folders and their contents by using the Folder List.
The Outlook bar displays shortcuts of frequently used folders; however, not all
folders are represented by these shortcuts. The Folder List displays *all* the
folders available in Outlook, including the folders represented by shortcuts on
the Outlook bar.

The Folder List displays each folder as a small icon followed by the name of
the folder. When you click a folder's icon, the contents of the folder are
displayed. For example, if you click the Contacts shortcut in the Folder List,
Outlook displays the contents of the Contacts folder, enabling you to view
contact records.

In this exercise, you use the Folder List to display many of the same folders
that you displayed in the previous exercise.

1   On the Folder Banner, click the folder name *Deleted Items.*
The Folder List is displayed.
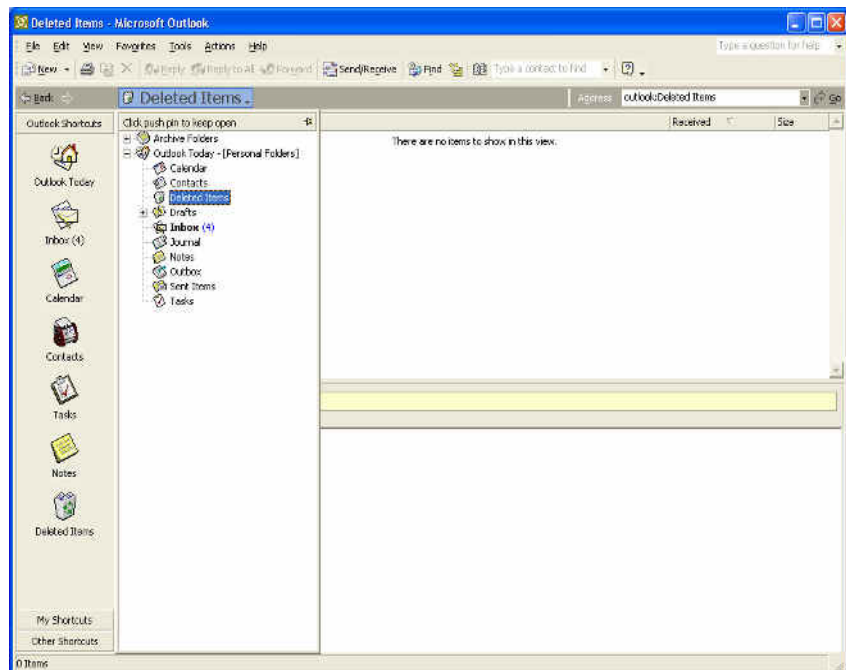
2   In the Folder List, click Inbox.
The contents of the Inbox folder are displayed and the Folder List closes.

3   On the Folder Banner, click the folder name *Inbox*.
The Folder List is displayed.

4   In the upper-right corner of the Folder List, click the Push Pin button.
The Push Pin button turns into a Close button. The Folder List will remain open until you close it.

5   In the Folder List, click Tasks.
Outlook displays the contents of the Tasks folder. Note that the Folder List remains open.

6   In the upper-right corner of the Folder list, click the Close button.
The Folder List closes.

Using the Office Assistant

Outlook, like all Microsoft Office applications, includes an extensive Help system that you can use to learn more about features and options available in Outlook. The **Office Assistant** is an animated character that provides helpful information about Outlook topics. By default, the Office Assistant appears as an animated paper clip named Clippit. However, you can choose to display the Office Assistant as an animated dog, cat, or any one of several other characters.


Help is readily available in Outlook. To view help when the Office Assistant is displayed, click the Office Assistant and type your question in the displayed box. Use your language of choice to phrase your request—for example, in Standard English, you might write "How do you send a message?" or "What is in the Journal?" You can simply type a few words, such as "send message" or "Journal," to view information related to those topics. The Office Assistant interprets your request and displays topics that match one or more words in your request. Click the topic that most closely matches your request.

In this exercise, you display the Office Assistant and use it to view help on an Outlook topic. Hide the Office Assistant to complete the exercise.

To change the Office Assistant, right-click the Office Assistant and click Choose Assistant. Click Next to view the various animations available and click OK when you have found one that you like. Only the paper clip animation is saved onto your hard drive during installation, so you will need to insert the Microsoft Office (or Microsoft Outlook) CD-ROM to install a new animation.

You can also select Show the Office Assistant on the Help menu to display the Office Assistant.

1   On the Standard toolbar, click the Microsoft Outlook Help button.
The Office Assistant is displayed with a box that asks you to type a question and click the Search button.
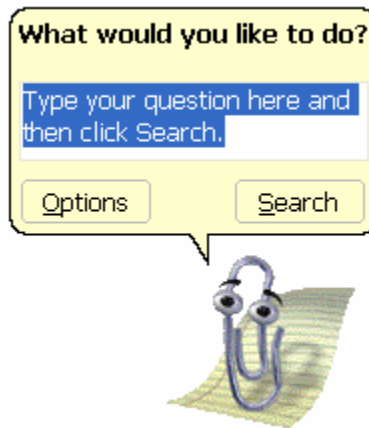
2   Type **How do I send a message?** and click the Search button.
The Office Assistant displays Help topics that are relevant to the question you asked.

3   Click the Send and Receive Messages option.
An Outlook Help window is displayed that explains how to send messages.
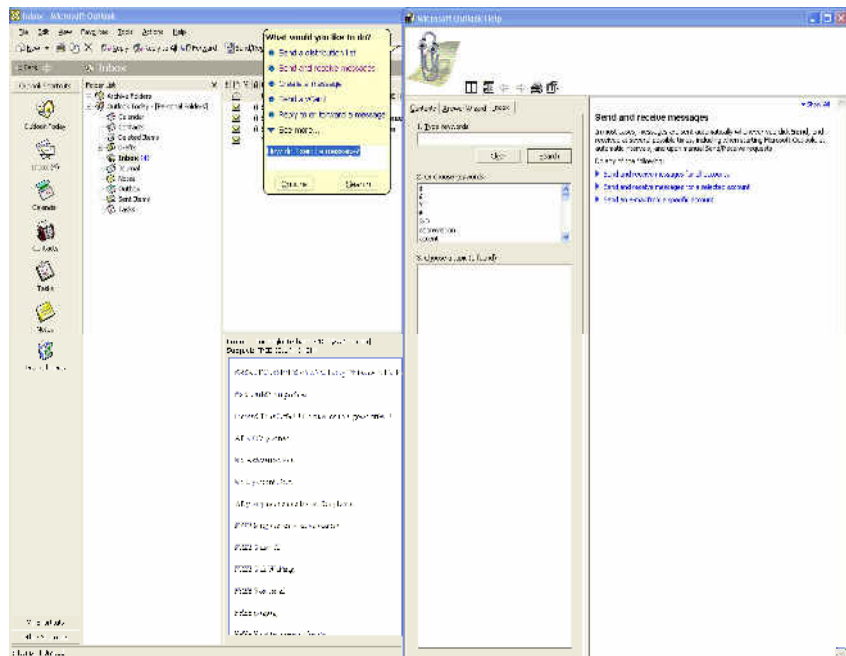
4   In the upper-right corner of the Help window, click the Close button.
The Outlook Help window closes.

5   Right-click the Office Assistant and click Hide.
The Office Assistant disappears.

Lesson Wrap-Up

In this lesson, you learned how to start Outlook and navigate through the main Outlook window. You also learned how to use the Outlook bar and the Folder List to display different Outlook folders. Finally, you learned how to use the Office Assistant to view more information about Outlook.

If you are continuing to the next lesson:

■   On the Outlook bar, click the Inbox shortcut.
     The contents of the Inbox folder are displayed.

If you are not continuing to other lessons:

■   In the upper-right corner of the Outlook window, click the Close button.
     Outlook closes.

Quick Quiz

1   What is a group?

2   How do you use the Office Assistant to view help topics in Outlook?

3   What functionality does the Folder Banner provide?

4   Identify two ways to display an expanded menu.

5   What are shortcuts?

6   List two ways to display an Outlook folder such as the Inbox.

Putting It All Together

Exercise 1: Display the View menu and display the expanded View menu. When you open the expanded View menu, move your mouse pointer across different menus on the Menu bar to view the results.

Exercise 2: Display the Folder List and keep it visible. Use the Folder List to display the contents of the Contacts folder and the Tasks folder. Use the Office Assistant to find out how to hide the Outlook bar. Hide the Outlook bar and redisplay it. Close the Folder List.

Exercise 3: Use the Outlook bar to display the Inbox, Calendar, Contacts, Tasks, and Notes. Observe the differences in the Standard toolbar as you select each shortcut in the Outlook Shortcuts group.

Exercise 4: Visit a Web site. Add it to your Favorites so you can access it through Outlook.

Exercise 5: Display the Office Assistant. Type **favorites** in the box and view the available help topics.