



OUTLOOK

2016

Certification Guide

Microsoft®

Outlook 2016

Certification Guide

Lesson 1: Getting Started with Email

Lesson Objectives

In this lesson, you will learn to identify Outlook program items, beginning with Mail, where you will compose, send, receive and view email messages. Upon completion of this lesson, you should be able to:

- | | |
|--|--|
| <input type="checkbox"/> use the Ribbon and Quick Access Toolbar | <input type="checkbox"/> set message options |
| <input type="checkbox"/> use the Navigation Pane and Peeks Bar | <input type="checkbox"/> work with attachments in messages |
| <input type="checkbox"/> configure mail settings | <input type="checkbox"/> read and view messages |
| <input type="checkbox"/> compose, address, and format message text | <input type="checkbox"/> reply to or forward messages |
| <input type="checkbox"/> insert items into a message | <input type="checkbox"/> save and print messages |
-

What is Microsoft Outlook

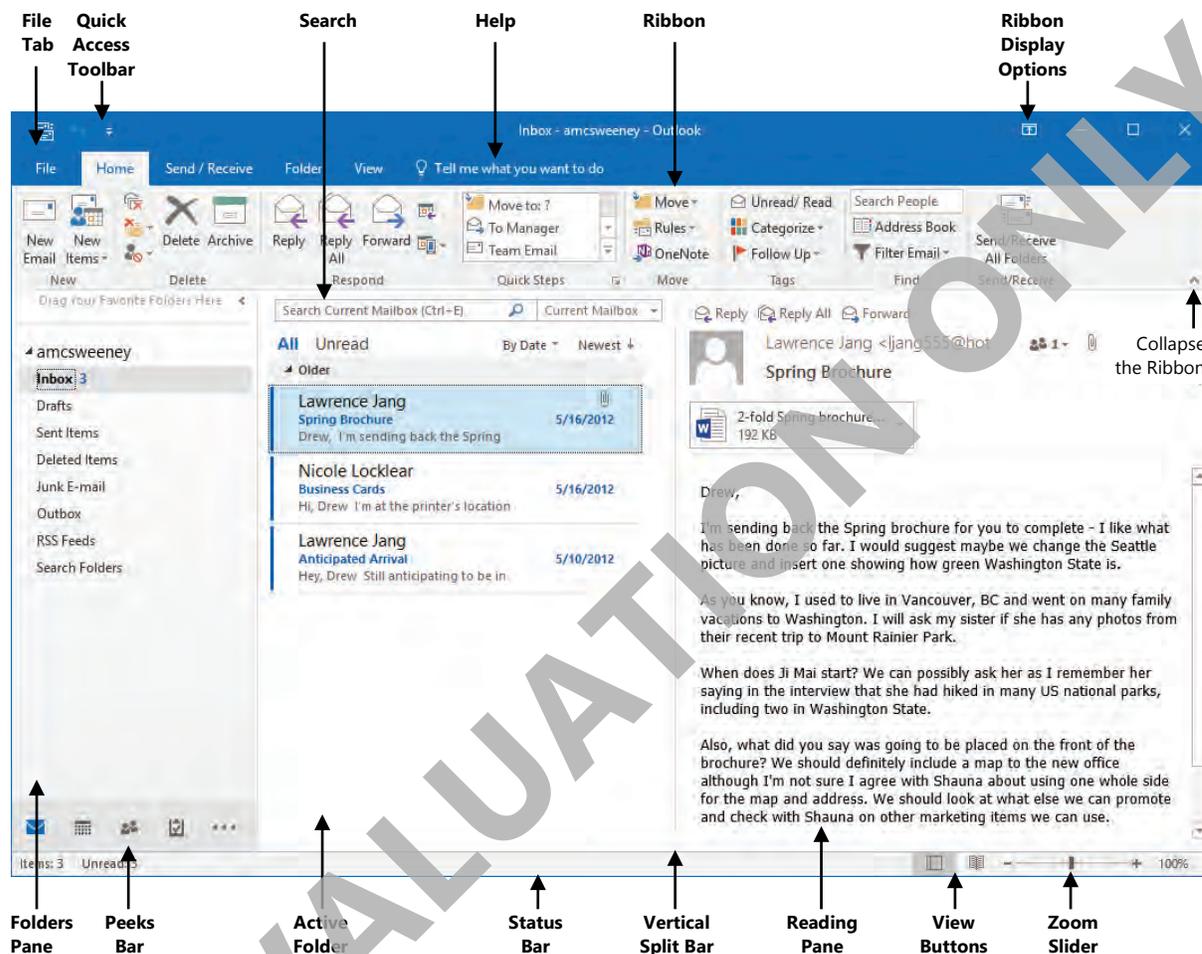
Microsoft Outlook is a personal time and information management program that you can use for:

- sending and reading e-mail messages
- scheduling appointments
- managing contacts
- creating a to-do list
- recording notes

With Outlook, you can organize and share information on your desktop and communicate with other people inside and outside of your organization.

Looking at the Screen

When you start Outlook, it appears with the most commonly used feature to communicate and share information with others – Mail. Your screen should appear similar to the following:



File tab – When clicked, this displays the Backstage view to select commands for organizing Outlook.

Quick Access Toolbar – Provides quick access to frequently used commands.

Ribbon – A collection of tabs providing easy access to a group of commands for specific purposes such as changing the view, creating folders, or checking for new mail.

Search – Use this to search for items within each module of Outlook.

Collapse the Ribbon – Collapses or minimizes the Ribbon to show more items in the Contents Pane.

Navigation/Folders Pane – Move or navigate between the different mail folders in the Mail module.

Peeks Bar – Move or navigate between the different Outlook modules.

Active Folder – Display the contents of the active (selected) folder in the Folders Pane.

Vertical split bar – Use to resize the panes; point the mouse cursor at a split bar to display  and drag the bar to adjust the size of the pane.

Reading Pane – Display the contents for the group item selected in the Navigation Pane.

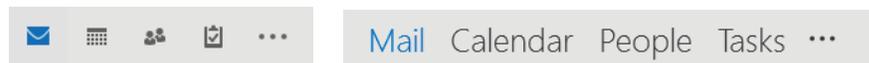
Status Bar – Provides information on the number of items stored in a folder.

View Buttons – Alternate between different views for the Outlook element; these vary with the active element.

Zoom Slider – Click the buttons at either side of the slider to increase or decrease the zoom percentage by 10%, or drag the slider button to choose a particular zoom percentage.

The illustration on the previous page shows the default Outlook screen. Because many of the screen sections can be resized, minimized, or turned off, your screen may look different. For example, the bar across the bottom may show icons or it may display text.

This bar is known as the Peek Bar and enables you to move to different modules or groups within Outlook:



Mail – Compose, send, read and manage messages.

Calendar – Schedule appointments, meetings or events.

People – Manage your contact list.

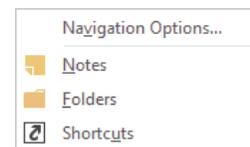
Tasks – An electronic to-do list that allows you to prioritize and track your activities.

Click the ... to see a menu of other elements you can access from this bar.

Notes – Enter brief notes.

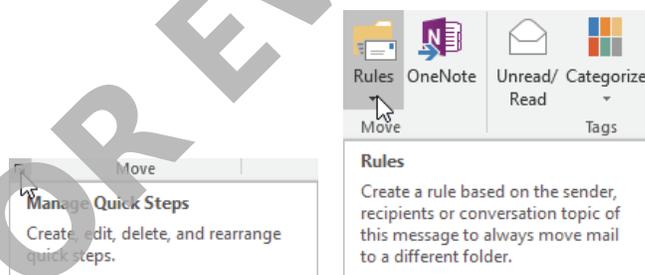
Folders – Display all folders in the top portion of the Navigation Pane.

Shortcuts – Display a different pane that lists any shortcuts you have set, as well as the option to navigate to Outlook Today (a quick view and summary of calendar items, tasks, or messages for the day or week view) or to go to Microsoft Office Online.



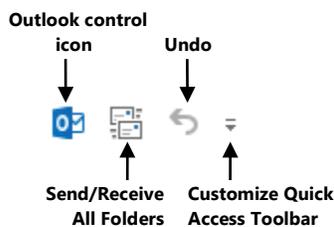
You can enter information into the individual elements or integrate Outlook features. For example, you can send a message directly to a contact while you are working in the Contacts module. This courseware focuses on the individual elements of Outlook, but some exercises demonstrate this easy integration feature.

ScreenTips help identify function buttons on the tabs of the Ribbon and the screen. To view a ScreenTip, point the mouse cursor on the item. A tip then displays the name of the button along with a description of its purpose. For some items, a keyboard shortcut may also display as an alternative for activating this feature.



Using the Quick Access Toolbar

The Quick Access Toolbar, at the left of the title bar above the Ribbon, contains buttons for frequently used commands. By default, this toolbar contains the buttons as shown below:



Use the last button to customize or display commands you use frequently, such as a new message, print, or spell check.

To customize the Quick Access Toolbar, use one of the following methods:

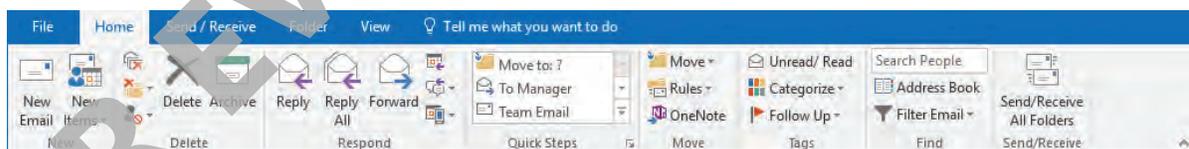
- click **Customize Quick Access Toolbar** and click a button from the list or click **More Commands**; or
- click **File**, click **Options**, click **Quick Access Toolbar**, then click a button from the list and make the appropriate changes; or
- right-click the Ribbon, click **Customize Quick Access Toolbar**, click a button from the list and make the appropriate changes.

To move the Quick Access Toolbar to below the Ribbon:

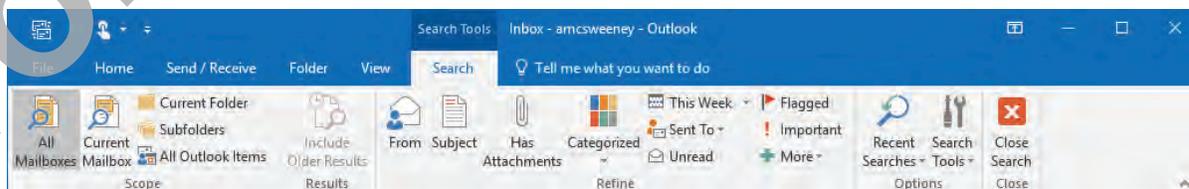
- click **Customize Quick Access Toolbar** and then click **Show Below the Ribbon**; or
- right-click the Ribbon, click **Customize Quick Access Toolbar** and then click **Show Quick Access Toolbar below the Ribbon**.

Using the Ribbon

The Ribbon helps you find the commands you require. Commands are grouped on tabs with each tab relating to a type of activity, such as inserting items into a message, changing the view of the Contents Pane, or formatting text in the message. You can customize the Ribbon to display those commands you use frequently in a particular order, or to add or remove commands for a Ribbon tab.

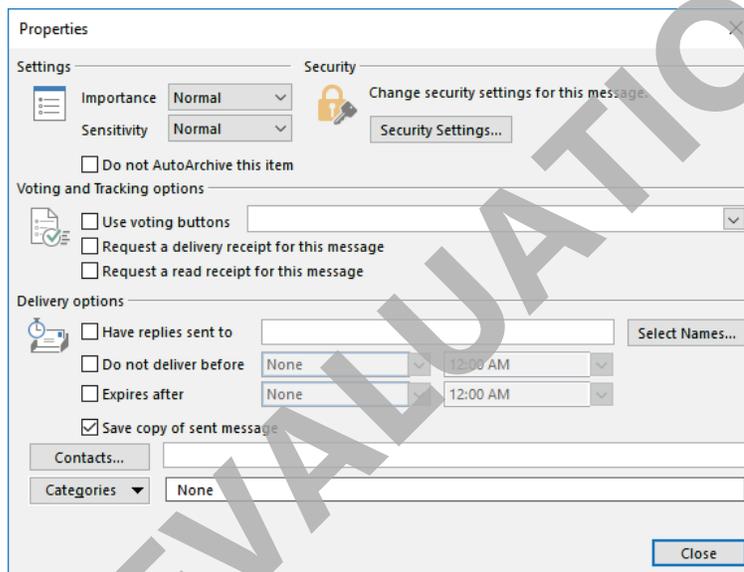
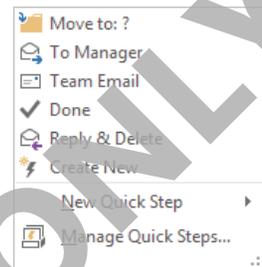


To reduce screen clutter, contextual tabs such as the Picture Tools tab appear only when they are applicable.

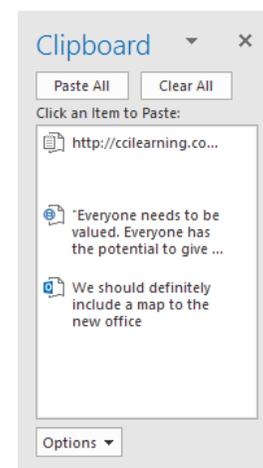


- A button that appears in a different color or has an outline is active; many of these de-activate when you click them or click another choice.

- Each tab on the Ribbon contains groups with similar command types: for instance, the Home tab contains the most commonly used commands for this module, and the Insert tab within a message window contains groups of items you can insert into a message.
- Some features include a Live Preview to demonstrate the effects of this feature. For instance, a gallery option in the Format Text tab of a new message contains a list of standard styles (formatting attributes). The first option is active for text, but if you point at another style option, Outlook provides a preview of how the text will appear if you apply this style.
- If a group has a scroll bar, use the button below the scroll bar to display the full list or gallery for that option. This is the  **More** button which, in this case, displays a menu with more options as shown below. In some cases, you can click to select the option or you may see a Live Preview. You can turn off the Live Preview feature in the General category using the **Options** command in Backstage.
- Click the  **Dialog box launcher** button at the lower right of a group to show a dialog box or task pane with more options for that group. Task panes appear at the left or right side of the screen. This button displays the name of the item that appears when you click the button.



Dialog Box



Window/Task Pane

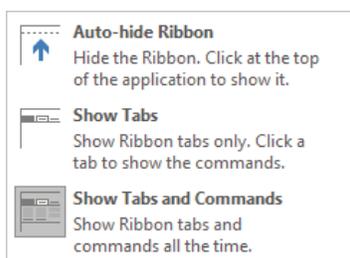
You can select items from the lists within the dialog box. Use the arrow for a list box to display more choices, or click a command to turn the feature on or off. It may display a preview of the changes.

A task pane usually contains options specific to the feature. The preceding graphic of the Office Clipboard displays items when the Cut or Copy command is used.

The Ribbon can be collapsed to show more of your document or if you want to hide the Ribbon. To collapse the Ribbon:

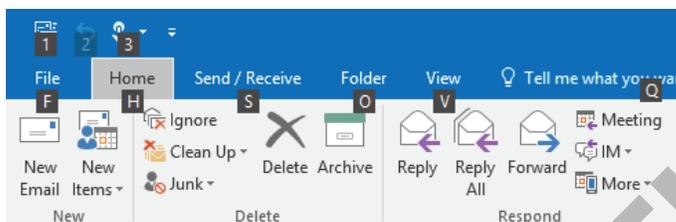
- use the  button at the far right of the Ribbon; or
- double-click any of the Ribbon tabs; or
- right-click anywhere on the Ribbon and then click **Collapse the Ribbon**; or
- press CTRL+F1.

Alternatively, you can use the  **Ribbon Display Options** button to choose how the Ribbon behaves:



You can also access the Ribbon using the keyboard; some users consider the keyboard a faster method for accessing some commands. Windows programs are consistent and share some keyboard shortcuts, such as pressing CTRL+C to copy, CTRL+S to save, or CTRL+P to print.

To access the Ribbon using the keyboard, press ALT or F10 to display the keyboard buttons for the commands in the Ribbon.



Using the Navigation Pane

Objective 1.1.3

The Navigation Pane is an efficient way of switching between different elements in Outlook and you can customize it to your needs. The contents in the Navigation Pane will vary according to the element in use.

When you start Outlook, the Navigation Bar (or the Folders pane when in Mail) and the Peeks Bar appear for further action. You can set these two bars to appear at the left side of the screen in collapsed mode by clicking the  button:



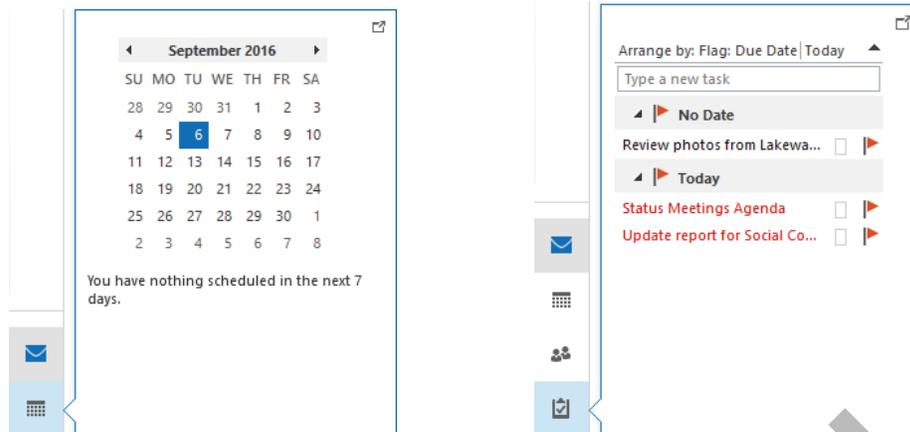
Navigation Pane



Peeks Bar

As you begin to use folders frequently, the Navigation Bar will contain buttons for the folders listed in the Favorites group, or those folders you want to access quickly or frequently use. This is also referred to as the *Folders Bar*, more often when in the Mail module.

The Peek Bar sits below the Navigation Bar/Pane, enabling you to point at an icon for a quick glance at any outstanding items for that element. As noted earlier, you can choose to display this in Compact mode (shows icons only) or with full text. The following previews use the Compact view.

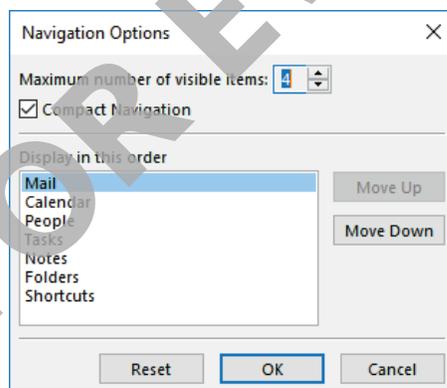


You can then click on a date or item in the list to open that item to the screen; alternatively, click the icon to move and open the Outlook module.

If preferred, use the  to expand the Bar and display the full Navigation/Folder Pane, thereby giving you quick access to any of the folders. The Peek Bar will also change to a horizontal display below the Navigation Pane. To keep the expanded view, click the  (Pin the Folder Pane) at the top right of the pane.

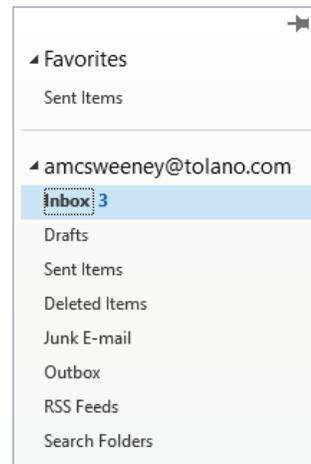
To select an option from either bar, click the item to display its contents in the pane at the right. If you only work with specific folders you may want to have them available in the Favorites area and collapse the Pane to the Bar view only.

Whether you display the full pane or keep it collapsed will depend on how you choose to organize your messages. For instance, someone who receives a lot of messages may set up folders by the senders or projects to store messages away from the Inbox, thereby leaving only current messages in the Inbox folder. Others may choose to leave all messages in the Inbox and delete messages that are no longer relevant. The decision on how to organize your messages may be driven by standards set up for an organization or within departments.



You can choose how the Navigation Pane appears by default. Click **File**, click **Options**, and then click **Advanced**. In the Outlook panes area, click **Navigation**.

Notice how you can change the order of those modules you use frequently, or reset the modules to the default order Outlook provides.



Learn to set Outlook display for quick access

In this exercise you will set Outlook to display in a certain manner for quick access to messages. You will also become familiar with some of the navigation tools in the main screen.

- 1 Start Outlook, if not already open on the screen.

The Outlook data file used for this course, is for Andrew McSweeney and this is where you will find specific items mentioned such as appointments, contacts, or tasks.

- 2 Take a moment to review how Outlook appears on your screen. Then, at the left side of the screen click the  or  button to expand or collapse the Folders Bar to display the full Folder Pane. If this is the first time Outlook has been started on this computer, you will expand the Bar.
- 3 Click the  to pin the Folders Bar and keep it expanded.

- 4 At the top right of the screen, click the  (**Ribbon Display Options**) button to display the menu and then click **Auto-hide Ribbon**.

The Ribbon no longer appears across the top of the screen; this view is helpful when you want to see more of the screen and access to the Ribbon only as needed. Alternatively, you can use the Ribbon Display Options buttons once more to set other actions for the Ribbon.

- 5 Double-click the Title bar, click the **Ribbon Display Options** button, click **Show Tabs and Commands** from the menu.

Your screen should return to the same view prior to step 1.

- 6 In the Peeks Bar, point at the Calendar icon to preview the current month, and then click the **Calendar**.

Today's date should be highlighted in a shaded box, along with a note indicating whether you have anything scheduled for today.

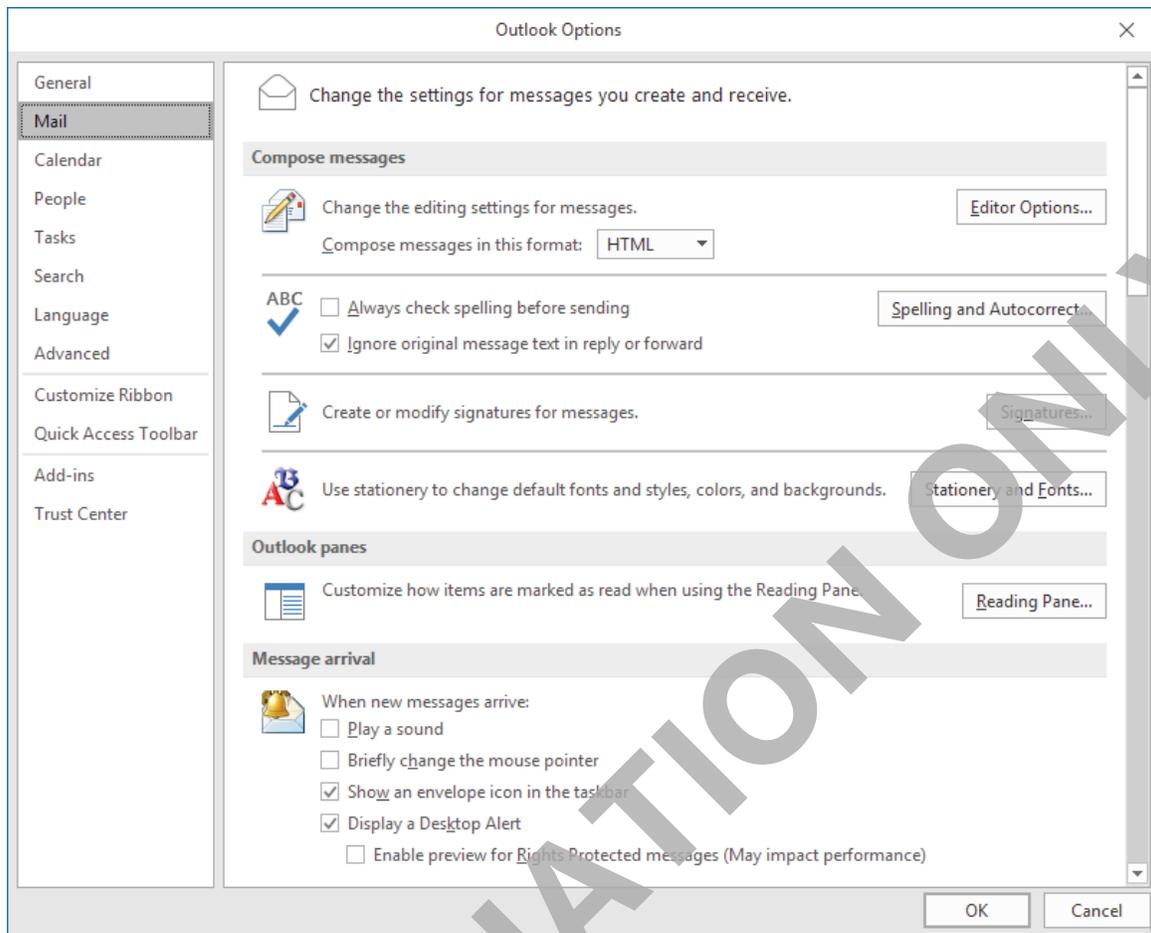
- 7 Click the ... in the Peeks Bar and then click **Notes**.

- 8 Click the **Mail** icon to return to the Inbox display.

Customizing Mail

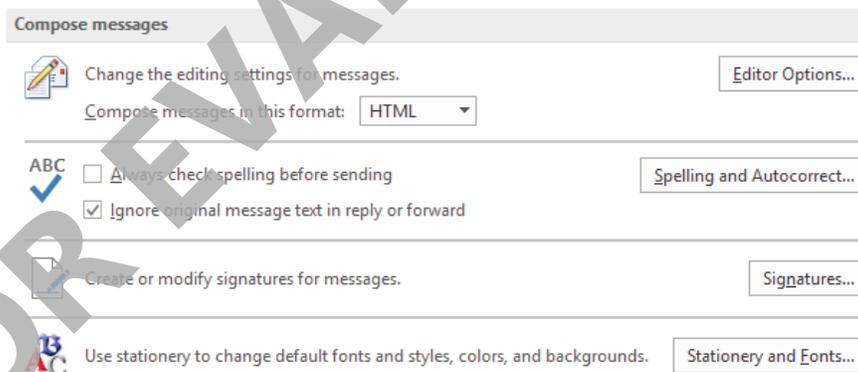
Objective 1.1.1, 1.1.2, 1.1.4, 2.1.1

You will probably mainly use the Mail element in Outlook. If so, you may need to customize this element to help you create or respond to messages. To customize options for messages, click **File**, click **Options**, click **Mail** and then click the option to change.



Compose messages

- Select which editor and mail format, automatic proofing tools, include a signature or set the background for all new messages.



Outlook panes

- Set the options to mark a message if using the Reading Pane to open and read messages.



Message arrival

- Choose the options to notify you when a new message arrives.

Message arrival

When new messages arrive:

- Play a sound
- Briefly change the mouse pointer
- Show an envelope icon in the taskbar
- Display a Desktop Alert
- Enable preview for Rights Protected messages (May impact performance)

Conversation Clean Up

- Select options when cleaning up conversations including choosing a folder you can read and delete later.

Conversation Clean Up

Cleaned-up items will go to this folder:

Messages moved by Clean Up will go to their account's Deleted Items.

- When cleaning sub-folders, recreate the folder hierarchy in the destination folder
- Don't move unread messages
- Don't move categorized messages
- Don't move flagged messages
- Don't move digitally-signed messages
- When a reply modifies a message, don't move the original

Replies and forwards

- Set up how the original message appears, if at all, when you reply or forward a message.

Replies and forwards

- Open replies and forwards in a new window
- Close original message window when replying or forwarding
- Preface comments with:
- When replying to a message:
- When forwarding a message:
- Preface each line in a plain text message with:

Save messages

- Set up how and where you may want to save any unfinished messages to be completed later.

Save messages

- Automatically save items that have not been sent after this many minutes:
- Save to this folder:
- When replying to a message that is not in the Inbox, save the reply in the same folder
- Save forwarded messages
- Save copies of messages in the Sent Items folder
- Use Unicode format