

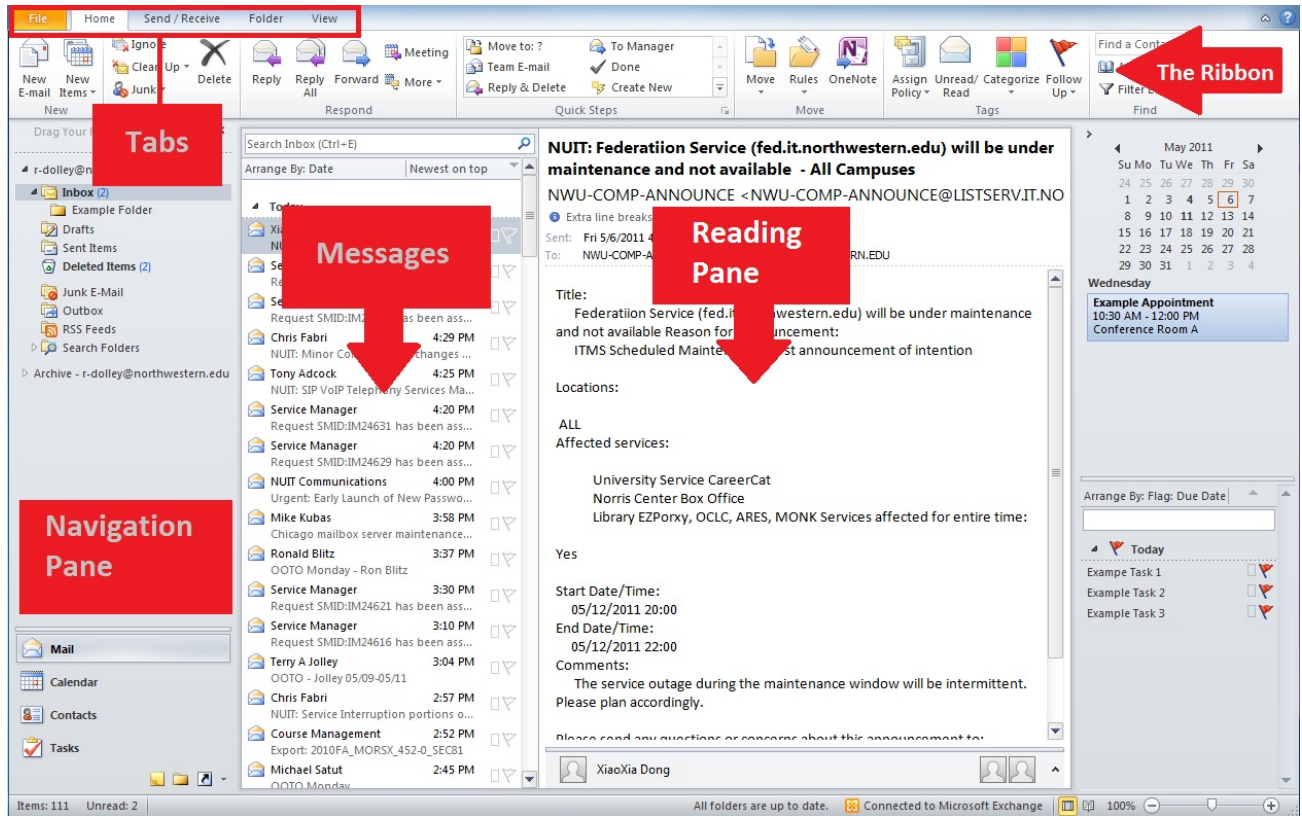


# Outlook 2010 Basic Training

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## The Outlook 2010 Screen



### Navigation Pane

- Mail** Contains mail related folders like inbox and sent items folder. Use the Favorites section at the top of the pane for easy access to frequently used folders.
- Calendar** Allows you to view and schedule appoints, events and meetings, and compare calendars side by side.
- Tasks** Organize to-do lists, track task progress and delegate tasks.
- Contacts** Store addresses, phone numbers, and e-mail addresses.

## E-mail Basics

### E-mail Basics: View Tab

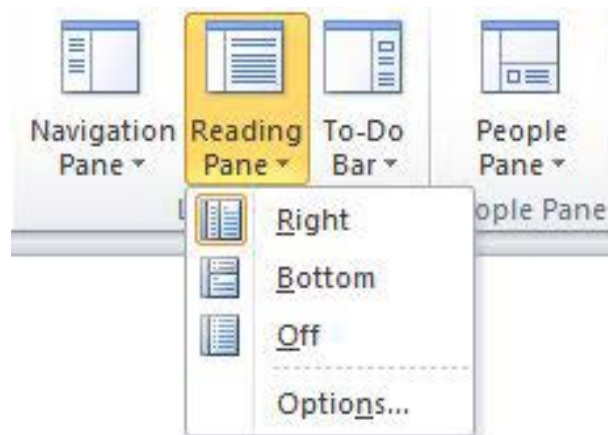
#### Changing view of Reading Pane

You can change the view of your Reading Pane on the screen, moving it to the right or bottom of the screen. You can also turn it on or off.

1. Click the **View Tab**.



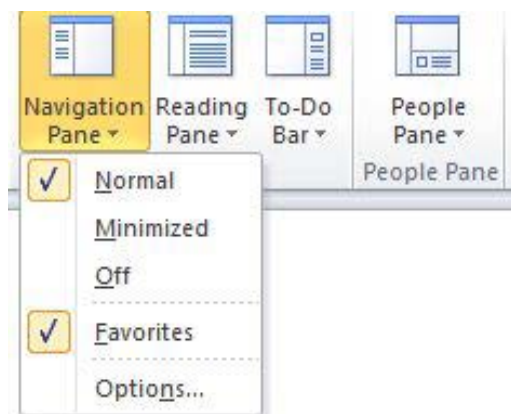
2. Click **Reading Pane** in the Layout section of the **Ribbon**.
3. Click **Right**, **Bottom** or **Off**.



## Changing View of Navigation Pane

You can change the view of your Navigation Pane two ways as well – Normal or Minimized. You can also turn the Navigation Pane off.

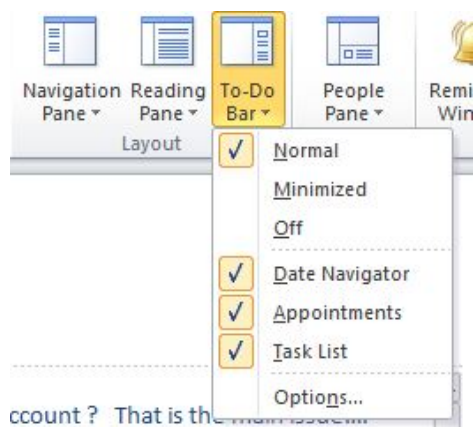
1. Click the **View Tab**.
2. Click **Navigation Pane** in the layout section of the **Ribbon**.
3. Click **Normal**, **Minimized** or **Off**.
4. You can also choose whether you want the favorites folders to show.



## Changing View of To-Do Bar

The To-Do Bar provides a Date Navigator, Appointments and Task List. You can select which features of the To-Do Bar are visible and choose between Normal and Minimized views. You can also turn the To-Do Bar off.

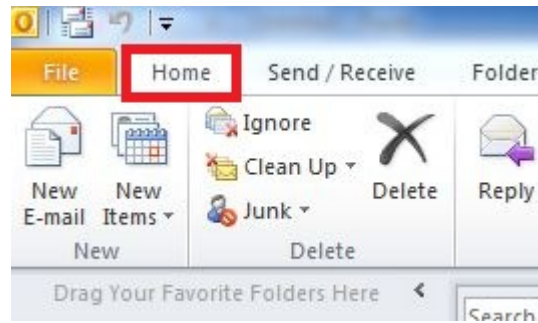
1. Click **View Tab**.
2. Click **To-Do Bar** in the Layout section of the **Ribbon**.
3. Click **Normal**, **Minimized** or **Off**.
4. Click **Date Navigator**, **Appointments** or **Task List** to toggle their visibility.



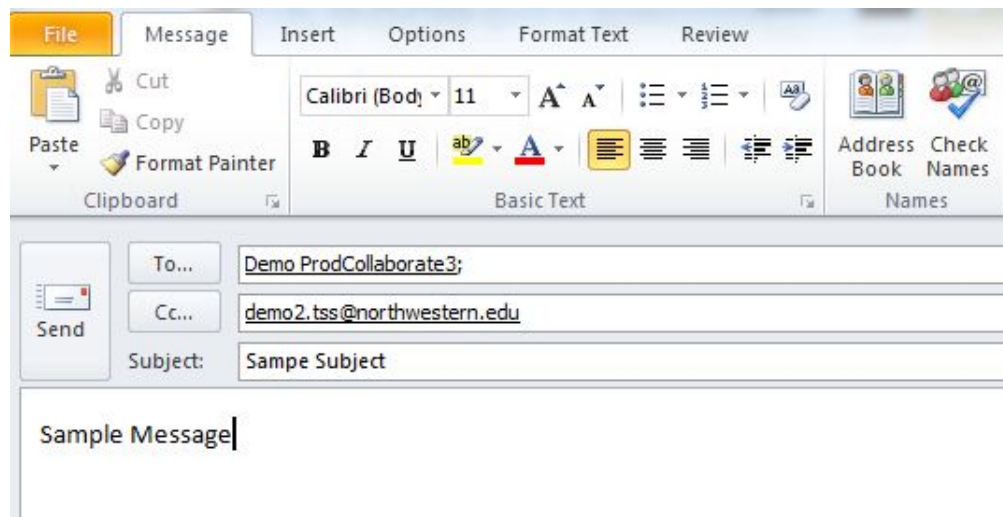
## E-mail Basics: Creating E-mails

### Sending an E-mail

1. Click the **Home Tab** if necessary.
2. Click **New E-mail** in the New section of the **Ribbon**. The new e-mail window will open.



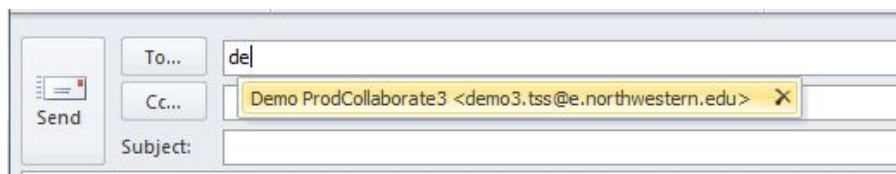
3. Type the address of the recipient in the **To...** field.
4. Type an address in the **Cc...** field if you wish to send a copy of the message to a third party.
5. Type a subject matter in the **Subject** field.
6. Type your message in the large **text box**.
7. Click **Send**.



## Auto-complete and the Global Address List

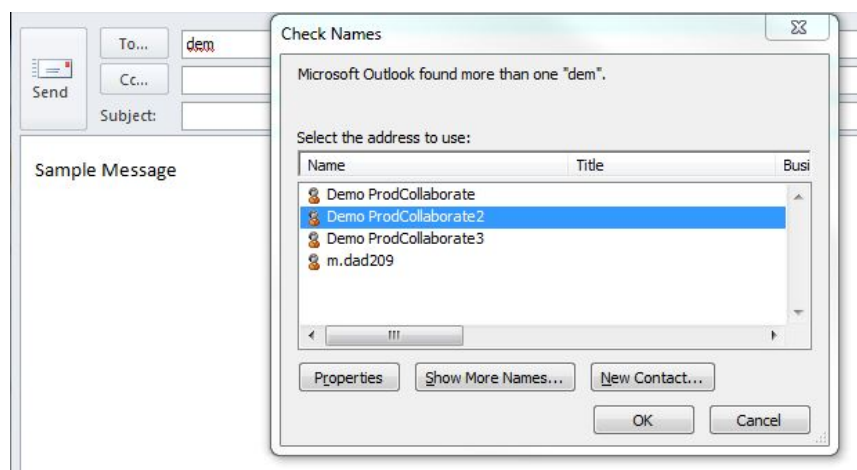
Outlook has an auto-complete feature that attempts to predict what e-mail address you're typing based on the addresses you've e-mailed in the past.

1. Auto-complete appears as soon as you *start typing* an address in the **To...** field.
2. The e-mail displayed will be Outlook's best guess at what address you are typing. It will refine as you input more characters.
3. *Hit enter* on your **keyboard** when the correct address is displayed and auto-complete will fill in the remaining characters.



The Global Address List is a statewide-wide contact list of state employees. It can help you find contact information and e-mail addresses, and can be accessed from the new e-mail window. We will discuss the Global Address List in greater detail later in this guide.

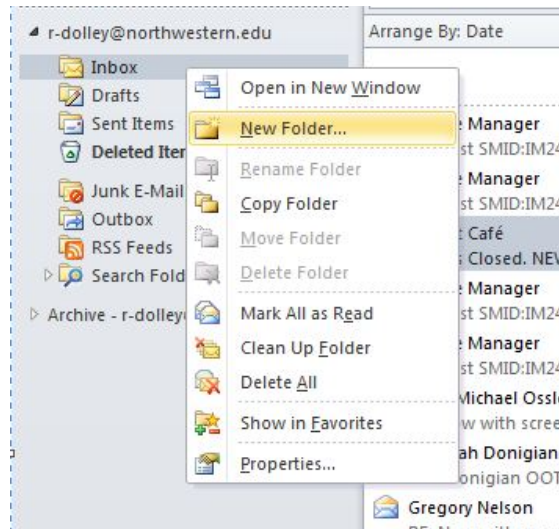
1. *Type* an identifying piece of information, such as a last name, into the **To...** field. You do not need to enter a full name, for example entering "Jorg" will bring up "Jorgensen" and "Jorgenson".
2. On your **keyboard**, *hold* the **Ctrl** key down and *hit* the **K** key.
3. The Check Names window will open. This window lists all matches from both your personal contacts and the Global Address List.
4. *Click* the **record** for the person you want to message.
5. *Click* OK.
6. An e-mail address for the person you want to message will appear in the **To...** field.



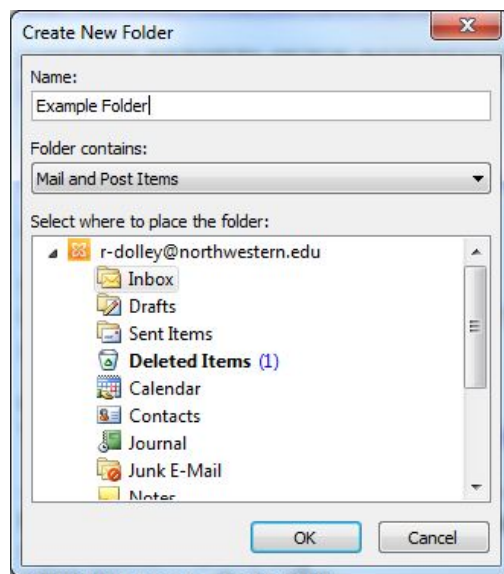
## Working with Folders

Folders provide a useful way to manage your messages. They appear in the navigation pane. You can create folders in any structure that suits your needs.

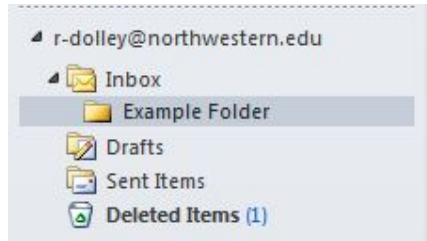
1. *Right click* on the **folder** that will house your new folder.
2. *Click **New Folder*** in the drop down menu. The Create New Folder window will open.



3. *Type* the name of your new folder in the **Name** field.
4. *Click* in the **Select where to place this folder** field if you wish to change where your folder will be located.
5. *Click **OK***.



- The new folder will appear in the location you indicated.



- You can *drag and drop* messages directly to this or any folder.

## E-mail Basics: Signatures

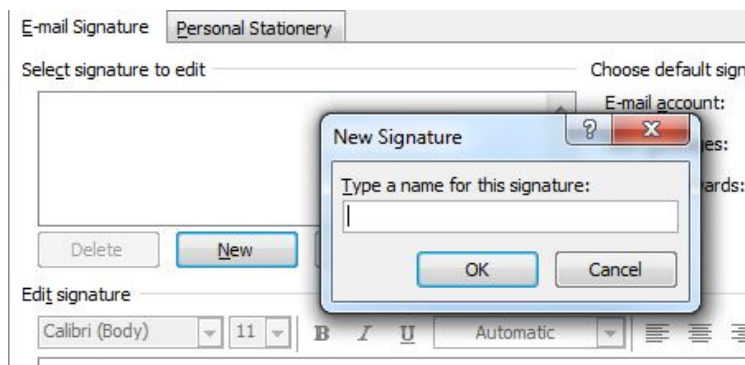
### Creating a Signature

Outlook 2010 allows you to create custom signatures for your messages. You may create multiple signatures to apply to messages as you see fit. Your first signature is automatically applied as your default signature and will appear on your outgoing messages.

- Click the **Home Tab** if necessary.
- Click **New E-mail** in the New section of the **Ribbon**. The new e-mail window will open.
- Click **Signature** in the New E-Mail menu.
- Click **Signatures...** in the drop down menu. The Signatures and Stationary window will open.

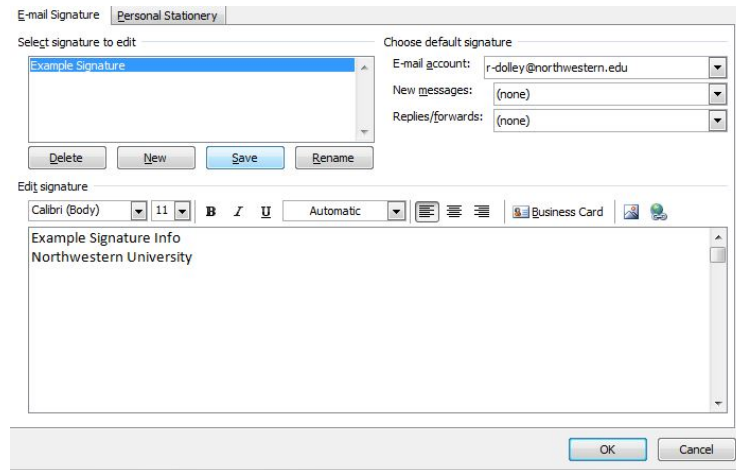


- Click **New** to create a new signature.
- Type the name of your signature in the **New Signature** window that appears.
- Click **OK**.





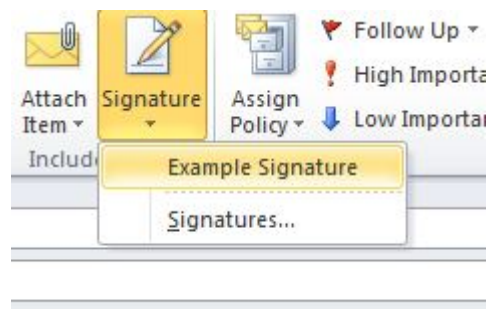
8. *Type* your desired signature in the **text box** below.
9. *Click* **Save** to save your signature.
10. *Add* additional signatures or *Click* **OK** to exit.



## Inserting a Signature

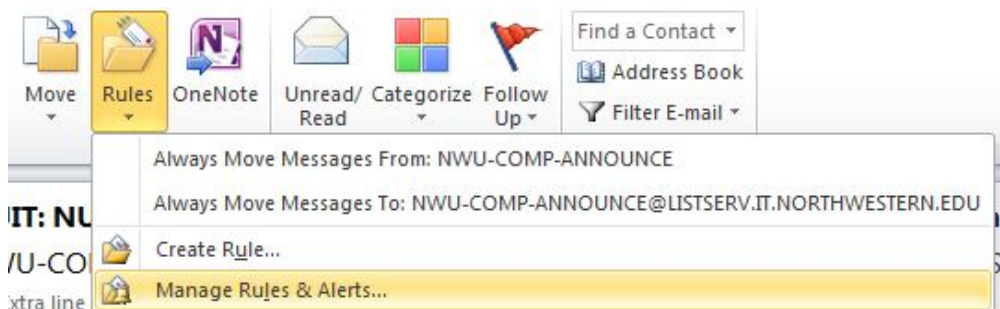
If you have created more than one signature, you can select which one you wish to use while composing a new message.

1. *Open* the New E-Mail window.
2. *Click* **Signature** in the New E-Mail ribbon. A list of the signatures you have created will appear in the drop down menu.
3. *Click* on the **signature** you wish to use.
4. The signature will appear in at the bottom of your message.

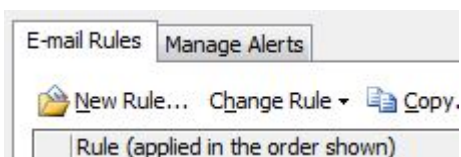


## E-mail Basics: Rules

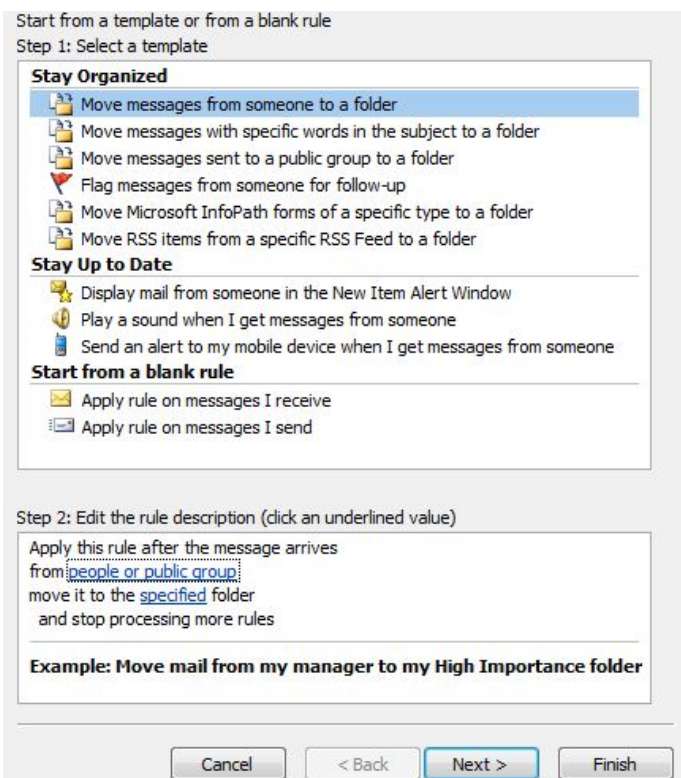
1. Click on **Rules** in the Ribbon.
2. Click **Manage Rules & Alerts** in the drop down menu.



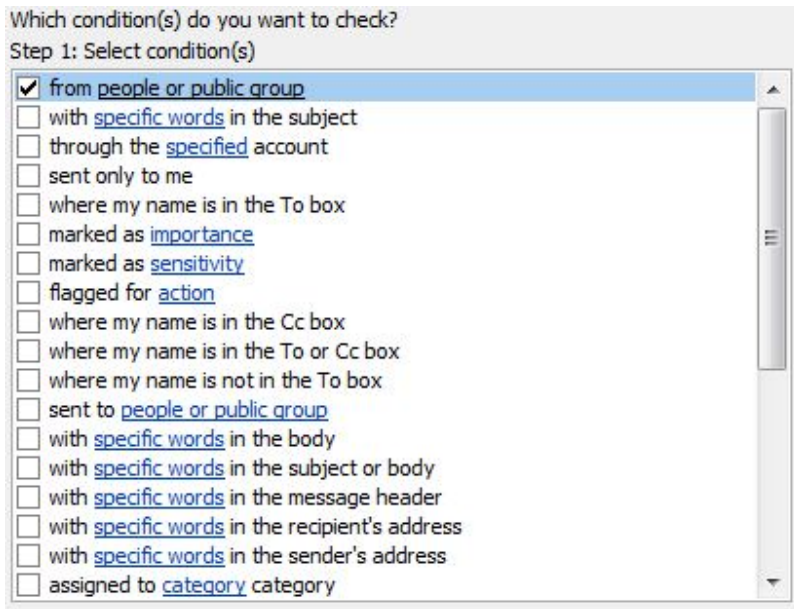
3. Click **New Rule**. This opens the Rules Wizard window.



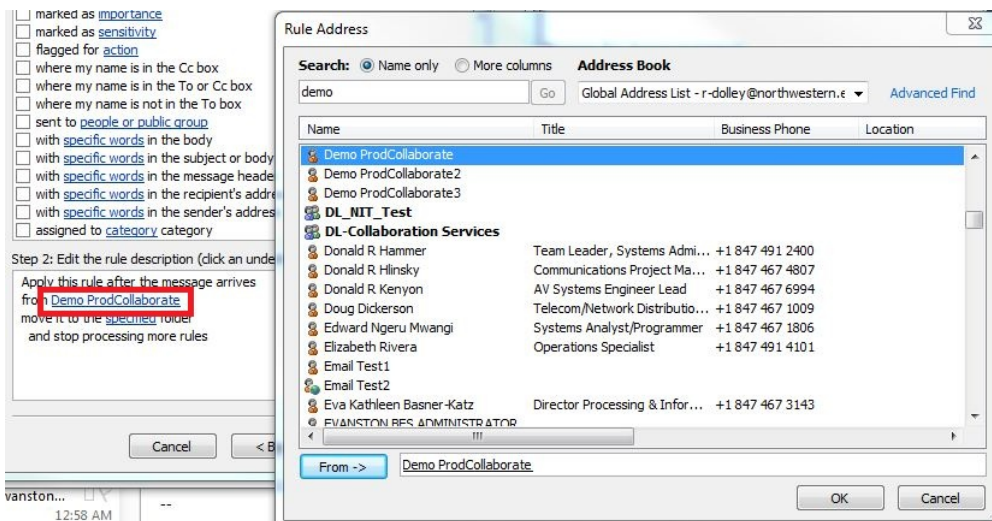
4. Select the type of rule you wish to create in the **Step 1: Select a template** menu.
5. In this example, select **Move messages from someone to a folder** and Click **Next**.



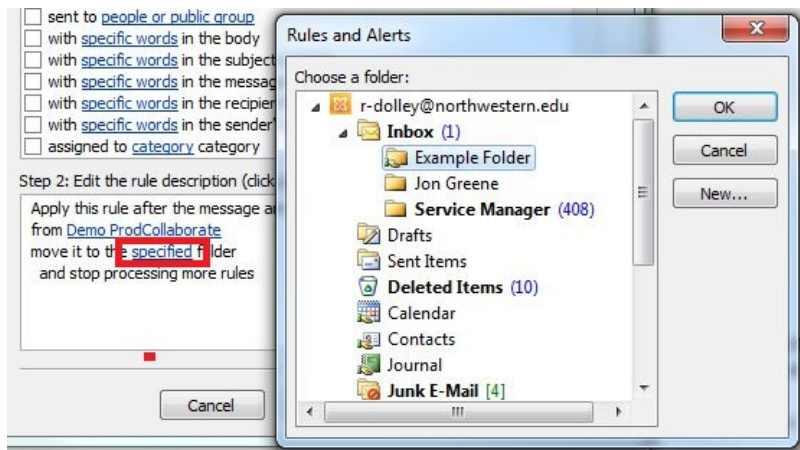
- Click the **check box** next to the condition(s) you wish to trigger the rule. In this example, **click from people or public group**.



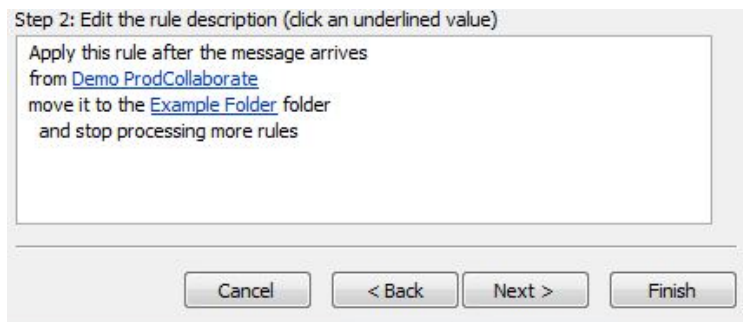
- Click the **people or public group** link in Step 2: Edit the rule description to open the Global Address List and select a person or group to whom the rule applies.



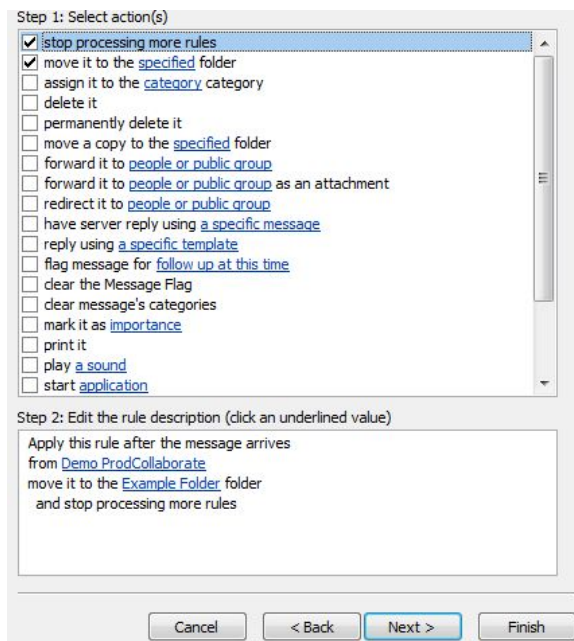
8. Click the **specified** link in Step 2: Edit the rule description to open a list of your folders. Select the folder to which you want to move incoming messages and click **OK**.



9. Your selections will appear in the Step 2 window. Verify that they are correct and Click **Next**.



10. Click what action you want Outlook to take with the messages. In this case, click **move it to the specified folder** and click **Next**.



11. *Select* any exceptions you wish to apply to the rule. In this example we are not adding any exceptions. *Click Next*.

Are there any exceptions?

Step 1: Select exception(s) (if necessary)

- except if from people or public group
- except if the subject contains specific words
- except through the specified account
- except if sent only to me
- except where my name is in the To box
- except if it is marked as importance
- except if it is marked as sensitivity
- except if it is flagged for action
- except where my name is in the Cc box
- except if my name is in the To or Cc box
- except where my name is not in the To box
- except if sent to people or public group
- except if the body contains specific words
- except if the subject or body contains specific words
- except if the message header contains specific words
- except with specific words in the recipient's address
- except with specific words in the sender's address
- except if assigned to category category

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives  
from Demo ProdCollaborate  
move it to the Example Folder folder  
and stop processing more rules

Cancel < Back Next > Finish

12. *Click Run this rule now on messages already in "Inbox"* to have Outlook apply the filter to messages already in your inbox.

13. *Click Finish* to complete the wizard and apply your new rule.

Step 1: Specify a name for this rule

Example Rule

Step 2: Setup rule options

- Run this rule now on messages already in "Inbox"
- Turn on this rule
- Create this rule on all accounts

Step 3: Review rule description (click an underlined value to edit)

Apply this rule after the message arrives  
from Demo ProdCollaborate  
move it to the Example Folder folder  
and stop processing more rules

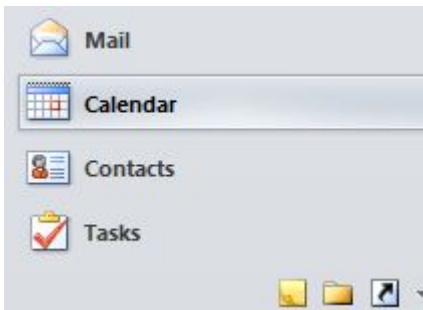
Cancel < Back Next > Finish

## Calendar Basics

Outlook 2010 has a robust calendar feature for managing your time and scheduling meetings with other STATE users.

### Access the Outlook Calendar

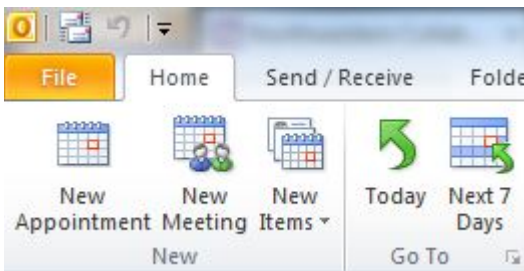
1. *Click* on **Calendar** in the **Navigation Pane**. The calendar will appear in the Outlook Screen.



### Adding an Appointment

There are two ways to add an appointment to your calendar:

1. *Click* **New Appointment** in the **Ribbon**.



**OR**

*Double click* an area on your calendar.



2. The Appointment window will open.

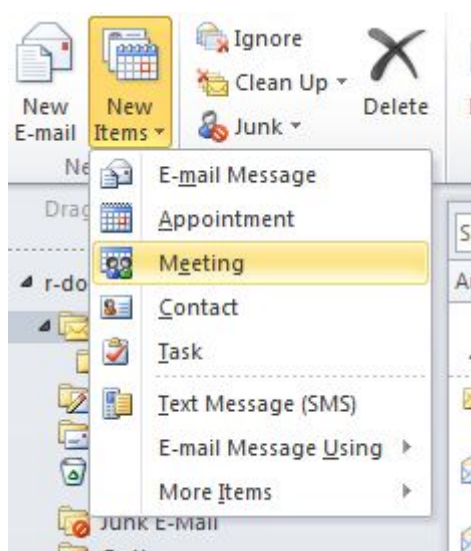


## Adding a Meeting Request

Meetings differ from appointments in that a meeting allows you to invite attendees and reserve rooms and resources at Northwestern. When you create a meeting request, invited users will receive an e-mail invitation to which they can respond. You will receive notification when users accept, decline or propose a new time for the meeting. There are two ways to access the New Meeting window.

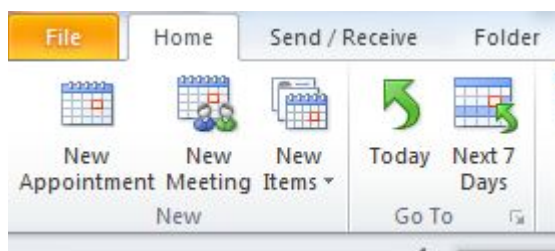
Invite users to the meeting by following the same steps as adding addresses to a mail message; auto-complete attempts to predict what e-mail address you're typing based on the addresses you've e-mailed in the past, while The Global Address List provides a statewide contact list of STATE employees

1. In the Mail view, *Click on **New Items** in the **Ribbon**.*
2. *Click **Meeting** in the drop down menu.*



**OR**

In the Calendar view, *Click **New Meeting** in the **Ribbon**.*

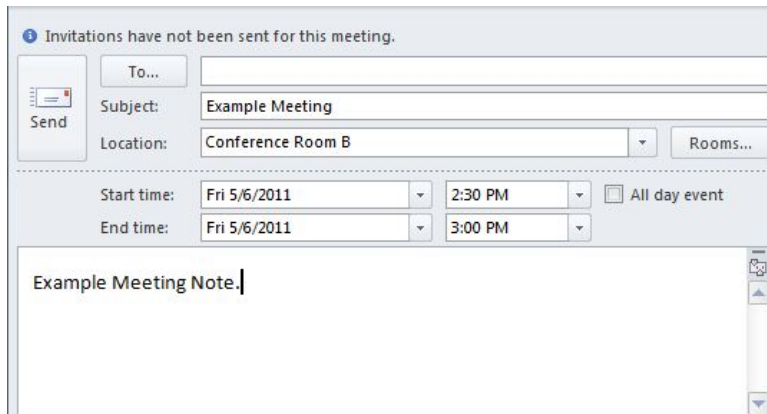


The New Meeting window will open.

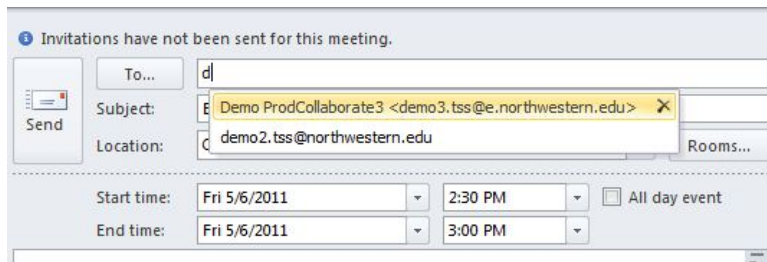
3. *Type a subject for your meeting in the **Subject** field.*
4. *Type a location for your meeting in the **Location** field.*



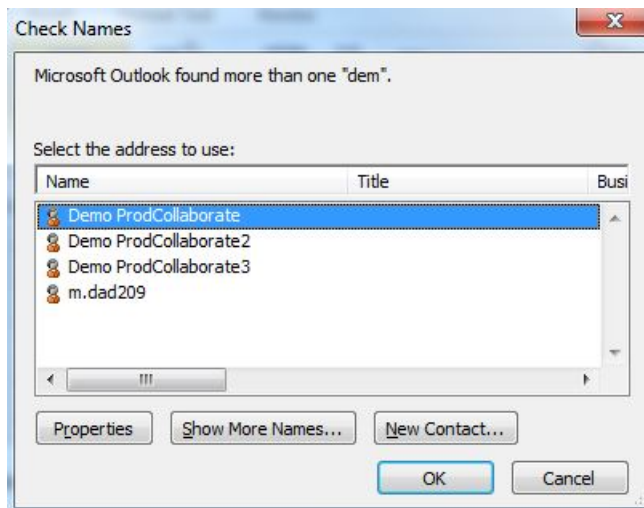
5. Type a note about your meeting in the large **text box**.



6. Click in the **To...** text box and begin typing the name or address of an attendee. Auto-complete will suggest a recipient. Hit **Enter** on the **keyboard** to accept a suggestion.



7. Type the name of an attendee in the **To...** field. Hit **Ctrl-K** on your **keyboard** and select the attendee you want from the list that appears. Click **OK**.



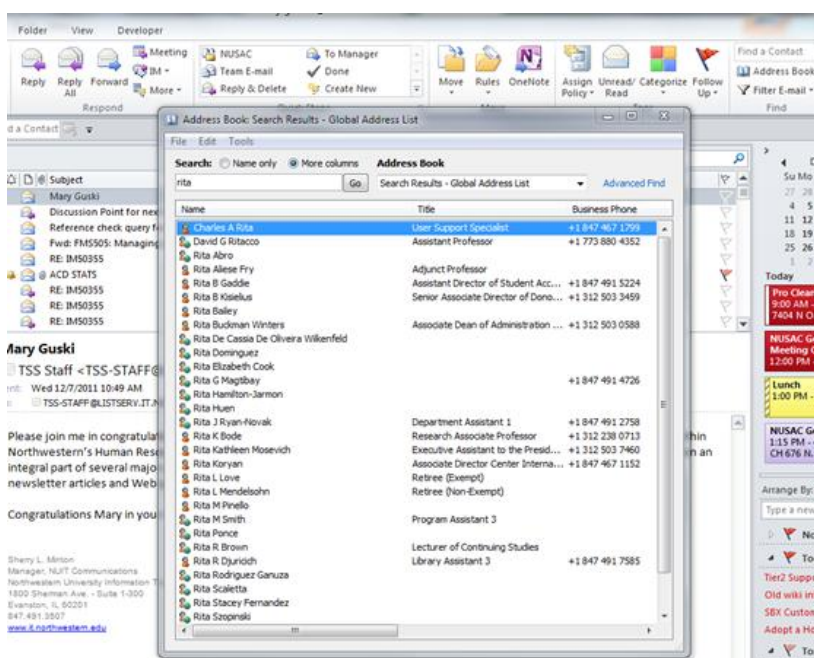
8. Selected attendees will appear in the **To...** field.
9. Select a date and time for the meeting.
10. Click **Send** to send the invitation. Attendees receive an e-mail invitation to the meeting, and you will be notified if they accept or decline.

## Contact Basics

### Global Address List vs Personal Address Book (Contacts)

You have two main ways of getting access to and storing contacts. You have access to a Global Address List that contains everyone in the State and a Personal Address Book for contacts inside or outside the State. To access the Global Address List:

1. **Click Address Book** on the right side of **Ribbon**. The Address Book window will open.
2. Click the **More columns** radio button. Selecting this option will allow you to search by first or last name, or email address. Once you have selected this option, Outlook will remember the selection, and you will not have to choose this option again.
3. **Type** a name into the **search** box. As you type, the search function will display possible matches.



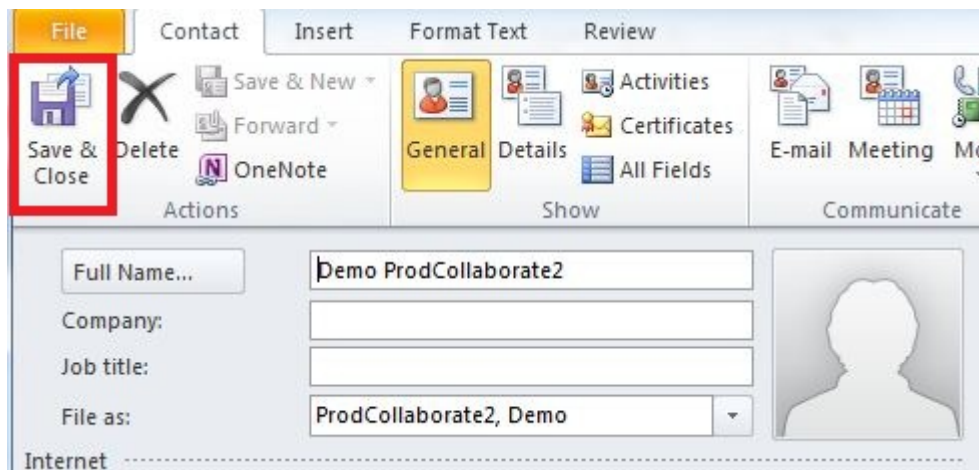
4. **Click the name** of the person for whom you are looking. A new window will pop up with this persons' contact information.
5. **Click Add to Contacts** to add them to your personal address book. A new window will pop up.

The screenshot shows the 'Add to Contacts' dialog box in Outlook 2010. The 'General' tab is selected. The fields are filled with the following information:

Name	First: Demo	Initials: [ ]	Last: ProdCollaborate2
Display:	Demo ProdCollaborate2	Alias:	demo2.tss
Address:	[ ]	Title:	[ ]
City:	[ ]	Company:	[ ]
State:	[ ]	Department:	[ ]
Zip code:	[ ]	Office:	[ ]
Country/Region:	[ ]	Assistant:	[ ]
		Phone:	[ ]

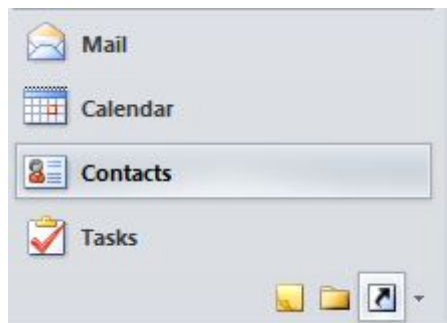
The 'Add to Contacts' button is highlighted with a red box. Other buttons include 'Actions', 'OK', 'Cancel', and 'Apply'.

Click **Save and Close**. They will appear in your Personal Address Book.



### To Access your Personal Address Book (Contacts):

1. Click **Contacts** in the **Navigation Pane**. Your contact list will open on the Outlook screen.



2. You can add new contacts, add contact groups, delete contacts, e-mail contacts and invite contacts to meetings from this screen.

## Tasks Basics

The tasks function of Microsoft Outlook is a way to keep track of daily, weekly, monthly and even yearly “to do” items. You can use tasks to help remind you of once-in-a-while tasks that you must get done, or recurring tasks that happen all the time.

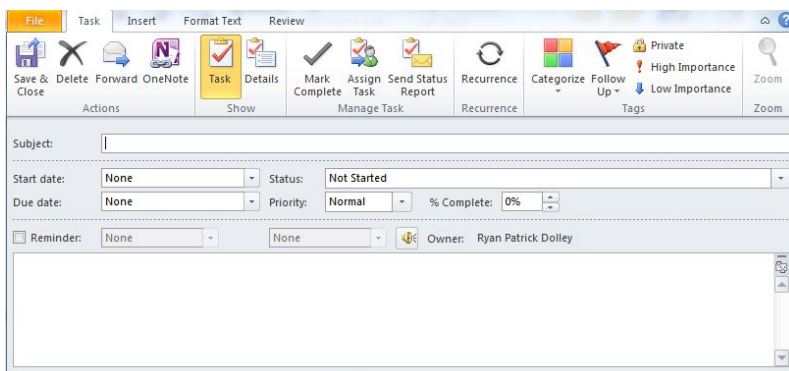
## Creating Tasks

1. Click **New Items** in the **Ribbon**.
2. Click **Task** in the drop down menu.



3. The New Task window will open. In this window you can:

- o Enter a subject for the Task.
- o Enter a start and end date.
- o Enter a status.
- o Assign a priority level.
- o Add a reminder.
- o Set the recurrence of the Task.
- o Set a follow-up reminder.
- o Assign the task to someone else.
- o Categorize the task.
- o Type notes for the task.

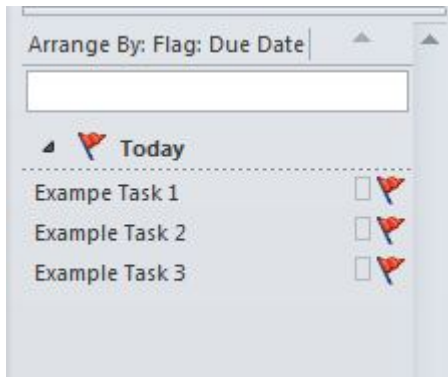


4. When you are done filling in the New Task window, Click **Save and Close**.

## Viewing Tasks/To-Do List

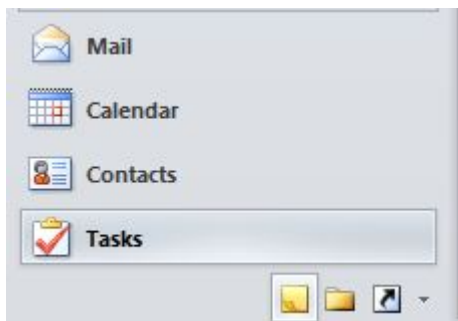
Your new task is now visible in two places:

1. The To-Do bar lists Tasks on the right side of the outlook screen.
2. Double *click* a **Task** in the To-Do bar view and *edit* the Task.



OR

1. *Click Tasks* in the **Navigation Pane**. This will open the Tasks view of the Outlook screen.



2. You can view the details of a Task in the Reading Pane.

