

Microsoft®

Outlook

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:

- use the Ribbon and Quick Access Toolbar
- use the Navigation Pane and Peeks Bar
- configure mail settings
- compose, address, and format message text
- insert items into a message
- set message options
- work with attachments in messages
- read and view messages
- reply to or forward messages
- 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:

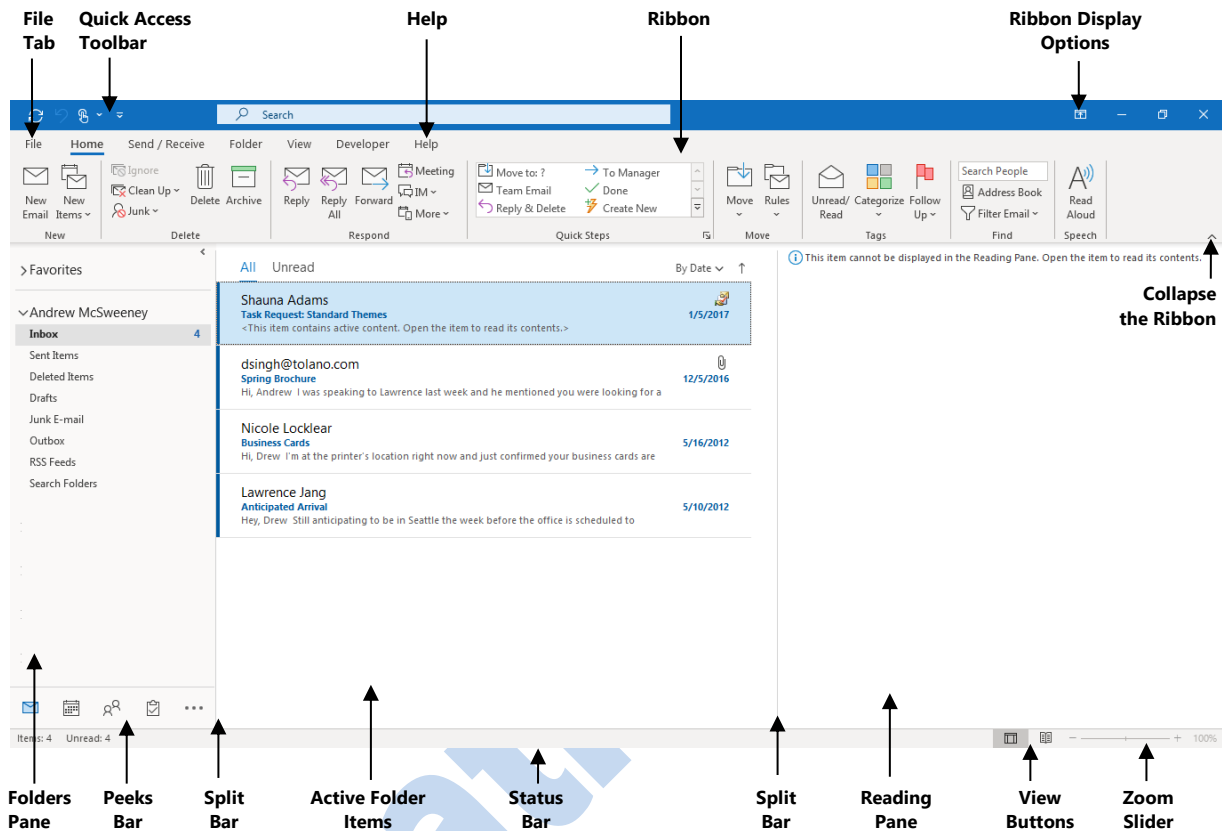


Figure 1-1 - Main Outlook screen

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.

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.

Split bars – 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.

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

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

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

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

Using the Navigation Pane

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 Peek 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, as seen in Figure 1-10 at the right. Click the > button to expand the Navigation Bar and click the 📌 to pin (always show) the Navigation 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.

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.

Figure 1-2 - Collapsed Navigation Pane

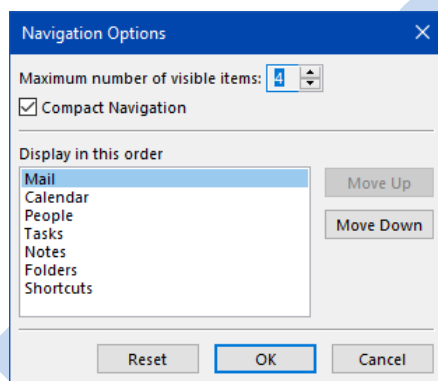


Figure 1-3 - Navigation Options

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 the View

Objective 2.3.7

You can customize the view for any of Outlook's modules to your preferences, such as turning off the preview to show more messages on the screen, turning the Reading Pane off, and so on.

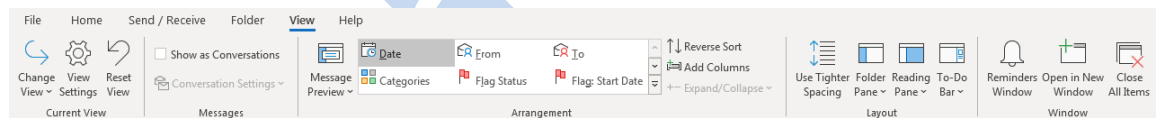


Figure 1-4 - View tab for Mail

Learn to customize options

In this exercise you will customize some options in Outlook and then change them back to the default.

1 Click **File**, click **Options**, and then click **Advanced**.

2 In the Outlook panes area, click **Navigation**.

3 Change the Maximum number of visible items to **5**. Click **Compact Navigation** to turn this off.

4 Click **OK** twice to exit the dialog boxes.

Notice how the Peeks Bar has text instead of icons.

5 Click ... in the Peeks Bar and click **Navigation Options**. Click **Compact Navigation**. Click **OK**.

6 Click **File**, and click **Options**. Click **Search** from the list of categories in the left pane.

7 In the Results area, click **All mailboxes** to have Outlook search all mailbox folders.

Creating a New Message

To send a message, open the mail editor, address the message, type and format the message text, and then send the message. Before sending it, you can flag the message or set send options.

When you finish composing the message, you will want to send it to the recipients. The message is temporarily stored in the Outbox folder until the mail server retrieves it and delivers it to the recipient via the Internet or your organization's network. If you set a delay for delivery of the message, it is stored in the Outbox folder until the designated delivery time.

Note: The delay option works only with a dedicated mail server such as Microsoft Exchange. The delay delivery option is discussed later in the lesson.

To create a new message:

- on the Home tab, in the New group, click **New Email**; or
- on the Home tab in the new group, click **New Items** and then click **E-mail Message**; or
- press CTRL+N.

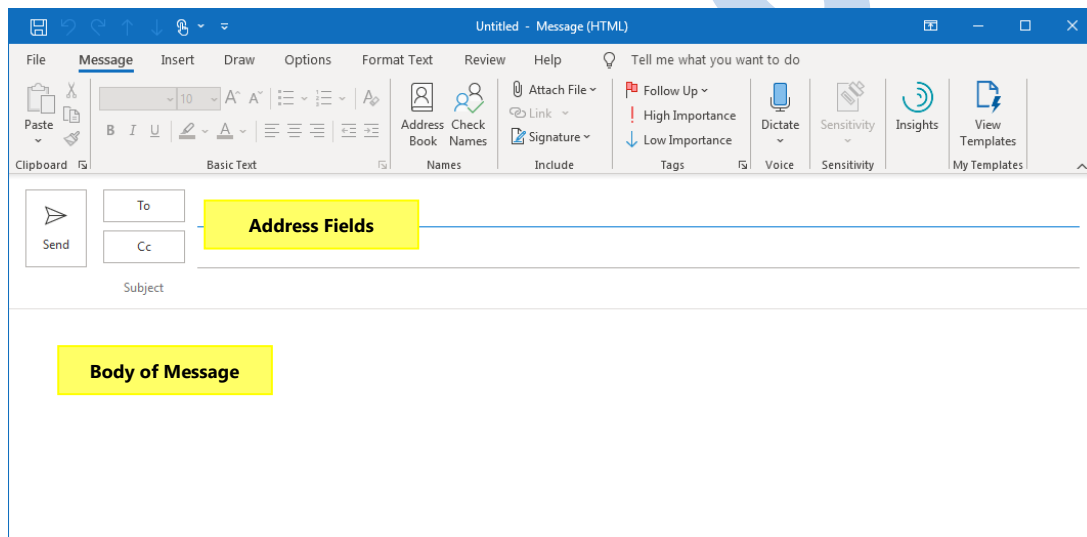


Figure 1-5 - New Message

Addressing a New Message

An email address has the format shown at the right, consisting of two parts: a domain and a name. The domain identifies the mail server's location on the Internet. The name identifies the storage location (mailbox) on the server where the message is stored until the recipient is ready to receive it.

There are two ways to address a message:

- type the name or mail address directly in the address box; or

To	<input type="text" value="Nick Klassen <nklassen@tolano.com>; ihanover@tolano.com"/>
Cc	<input type="text" value="Nicole Locklear <nlocklear@tolano.com>"/>

Figure 1-6 - Address Fields

- select the name from the Address Book.

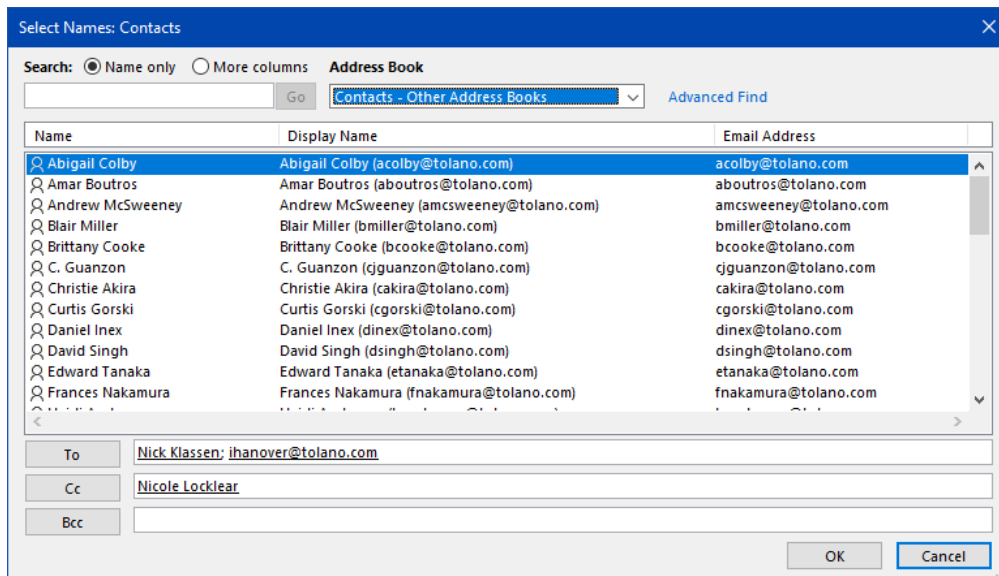


Figure 1-7 - Address Book

- Click the first letter of the name for Outlook to search for the first name that matches the characters.
- Select the name of the recipient and then click the address field to add the name in that field.
- To select consecutive names in the Address Book, click to select the first name in the list, press SHIFT and click the last name in the list to select everyone from the first name to the last name in the list.
- To select individual names, select a name, press CTRL and then click each name you want to include in the address field.

To address a message to multiple recipients, type a semi-colon (;) or a comma (,) as the separator character between the names being entered into an address field.

Outlook provides you with the option to send a Carbon copy (Cc) as well as a Blind carbon copy (Bcc).

- Recipients addressed in the Cc box are visible to all other recipients of the message.
- Recipients addressed in the Bcc box receive a copy of the message, but their names are hidden from other recipients of the message.

By default, the Bcc and the From fields are turned off in the New Message window and can be activated from the Show Fields group of the Options tab. Note that once turned on, these fields will appear for every new message until you turn the fields off using the same procedure.

Using @mention

Objective 2.1.3

When you want to draw a recipient's attention, you can use the @ symbol to display a list of contacts. Depending on the how the network was set up, you may see names of people as well as the names of any groups. For instance, by typing a @ in the body message, Andrew could choose from the following list:

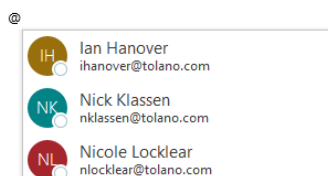


Figure 8 - @ mention

This symbol has become a standard with social media and is used to tag or mention something specific in the message or post. As you begin entering characters for the special mention, the items in the list will change narrow to match the characters being entered.

Entering and Formatting Message Text

Once you have addressed the message and entered a subject, you are ready to type and format the text for your message. You can format text as you type or after typing it. Outlook provides you with numerous formatting options.

Formatting refers to the process of enhancing the appearance or position of the text by applying attributes such as a different font, changing the color of text, or adding bullets to text in a list. This does not address the mail format used to send messages. In fact, text formatting is not possible if the mail format option is set to Plain Text. HTML format is the default which displays all pictures and formatted text; Outlook will also convert any messages it receives in Rich Text format into HTML format so you can view the entire contents of the message.

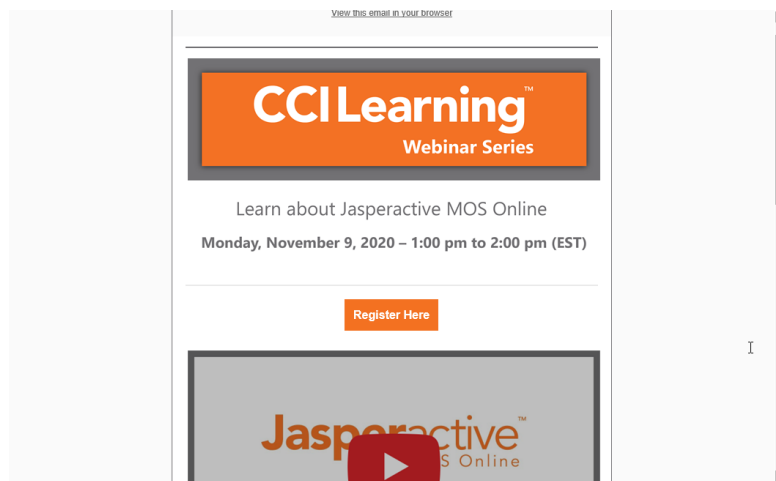


Figure 1-9 - HTML Message

Plain Text removes any formatting applied in a message, making the message easy to read and small to send. However, it appears very plain, as seen in the following compared to the HTML version previously:

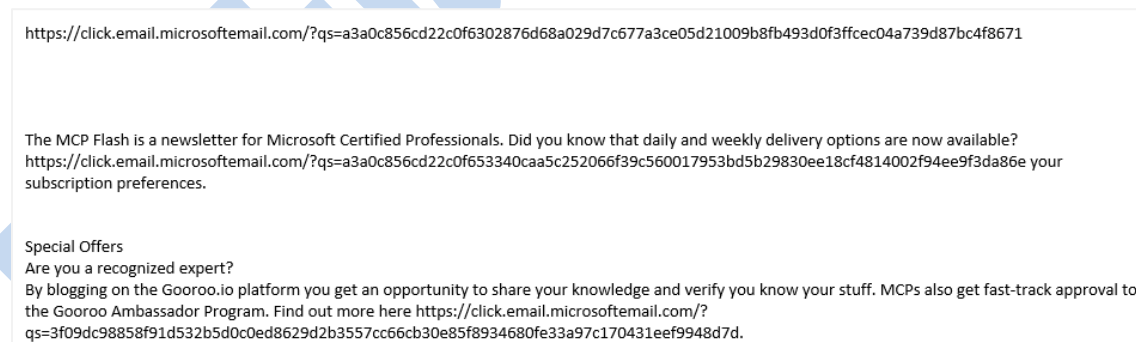


Figure 1-10 - Plain Text Message

Inserting Items in Messages

In addition to text, you can add other items into the body of the message to help the recipient find specific information. Items can be inserted directly into the message area or included as attachments (discussed later). You need only to position the cursor where the item is to be inserted and then activate the appropriate command.

Inserting Hyperlinks

Objective 2.2.1

Consider entering a hyperlink when you can point the recipient to a web site address for more information, or to include someone's email address. When the recipient clicks this link in the message, they are directed to the web site address or Outlook will create a new message addressed to this contact.

To insert a hyperlink manually:

- click the **Insert** tab and, in the Links group, click **Hyperlink**; or
- press CTRL+K; or
- right-click in the body message and then click **Hyperlink**.

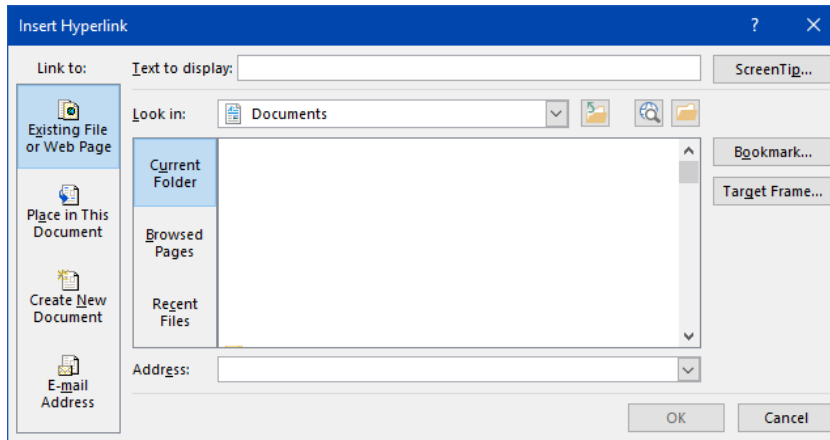


Figure 1-11 - Insert Hyperlink dialog box

Inserting Pictures

Objective 2.2.2

You can insert a picture directly into a message, such as a new product or a photograph. This differs from sending an attachment as this option inserts the item directly into the body of the message; it does not send a copy of the original file.

You can also make adjustments to the picture to correct the brightness or contrast, or to add an effect to it. To change the quality of the picture, you need a dedicated graphics design program such as Adobe Illustrator.

To insert a picture or clip art image, position the cursor where you want to place the image in the message. Then click the **Insert** tab, in the Illustrations group, and click the corresponding option to use:

- Use the **Pictures** command when you have a picture or video file saved on your local drive, network drive, or on the cloud (such as OneDrive).
- Use **Online Pictures** when you want to search for a drawing, movie, sound or stock photograph of a specific topic from the Internet.

The inserted image is automatically selected, showing small boxes called *handles* around the perimeter of the image. Click the **Format** tab of the Picture Tools Ribbon to make adjustments, as necessary for the image.

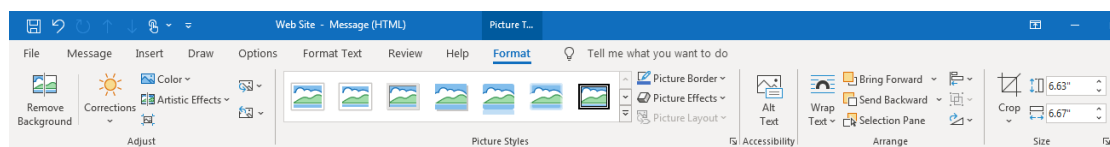


Figure 1-12 Picture Tools Format tab

An alternative to inserting the picture within the body of the message is to send it as an attachment. Sending the pictures as an attachment (discussed later in this lesson) makes the message larger than including the picture within the message body.

Learn to create and format messages

In this exercise, you will create a new message and use various formatting options to enhance the text before you send the message.

- 1 On the Home tab, in the New group, click **New Email** to create a new message.
- 2 In the To field, type: **sadams@tolano.com**. In the Cc field, enter the email address provided for you in this class.
- 3 In the Subject field, type: **Standard theme for messages**
- 4 In the body text, type the following:

Hi Shauna,

Further to our discussion last week, I like the Facet theme for use in the Seattle office. I have applied this theme in this message for you to view the color scheme.

Let us know which themes make the short list for internal messages so I can then poll the other Travel Directors.

Thanks!

Andrew

- 5 Double-click the word Facet in the first paragraph and in the Mini toolbar, click **Bold**.

This word is now in boldface characters.

Now try applying the theme mentioned in the message body text.

- 6 Click the **Options** tab and, in the Themes group, click **Themes**.
- 7 Look at the different themes and then click **Facet**.
Notice how the colors for the buttons in the Themes group changed to match the main color scheme for this theme.
- 8 Click **Send** to send this message.

Now use another method to create a new message.

- 9 Press CTRL+N to create a new message. In the To field type: **ljang@tolano.com**. In the Cc field, enter the email address provided for you in this class. In the Subject field, type: **Winter Newsletter**.
- 10 Click in the message body area and type the following:

Hi Lawrence,

I'm trying to find a copy of the newsletter we released last year – would you have a copy you can send me? I believe it started with the following:

Tolano Adventures – Newsletter

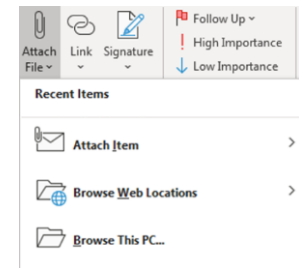
Volume 5, Winter Edition

- 11 Type: **@sha** to begin entering Shauna Adams and then press ENTER when you see her name in the list. Then continue typing the rest of the email:

is looking to expand the number of times our newsletters are distributed in the year.

Thanks!

Andrew



- 12 Select the title that starts with Tolano Adventures and then click the **Format Text** tab, in the Styles group, point at the Heading 1 style.

Outlook previews how the text will appear if you click this style. Notice how Outlook has the original style, Normal, highlighted at the same time to remind you this is the original style applied to the text. This is an example of how you can use styles to format the text to emphasize items or set consistent formatting in the message.

- 13 Click **Heading 1** to apply this style to the selected text.

The text should now have the formatting options associated with this style.

- 23 Send the message.

Working with Attachments

You may sometimes need to include with your message a file that was created in another program, or if you have a lot of information to share. While Outlook enables you to insert a large variety of items into a message, you may find it more convenient to receive an attachment instead of having the item embedded in the message itself.

Depending on the type of file attached, the recipient may have to convert the file to a different format to successfully open and read the attachment. For example, if you send a Microsoft Word document to a recipient who uses WordPerfect, the recipient will have to convert the attached file to a different format to be able to view its contents. Also be conscious of the size of the attachment and how the message may not be delivered if the item is too large. For instance, you may be sending a presentation with 5 slides but the one slide that has an embedded video, the total size of the presentation file may be larger than your Internet connection allows.

Including Attachments

Objective 2.1.1

You can attach files to a new message, or to a message you want to reply or forward; the attachment can be included before or after you type the message text. Note that Outlook blocks some attachments as part of its internal security, as with files which have .exe, .bat or .com extensions. You can reduce the security level or use different file formats, such as using zip compression software to send such files.

Items can be included from within Outlook such as a contact card or a message, or an external data file such as a Word or Excel file, several images, or a video.

To add a file to a message, on the Message or Insert tab, in the Include group, click **Attach File**.

Depending on what you have worked on, this drop-down menu may also include a list of the files recently used. To select one of these files, click the file in the list; alternatively, click one of the other commands to navigate to where the file can be located and selected.

There are no restrictions regarding the location of the file. As noted previously, you will need to be careful attaching files that may be flagged as a security risk by the recipient's mail server, or a file that is undeliverable because it is too large.

Learn to add an attachment

In this exercise, you will send a new message that includes an attachment, along with an Outlook item.

- 1 Press CTRL+N to create a new message and click the **To** button to display the address book.
- 2 Scroll in the list to see the names, click **Lawrence Jang** and then click the **To** button. In the Cc field, type the email address assigned to you for this class (or use your personal email address). Type a comma and then type: **nklassen@tolano.com**. Then click **OK** to return to the new message window.

Notice how Outlook updated the email addresses to show a semi-colon instead of the comma you entered in step 2. By default, Outlook uses the semi-colon to separate email addresses and will revert to this symbol prior to sending the message.

- 3 In the Subject field, type: **Org chart**.
- 4 Click in the body text area and type:
Attached is the most recent organization chart for Tolano Adventures, as well as the contact information of the new lawyer in our building.
- 5 On the Message tab, in the Include group, click **Attach File** and then click **Browse This PC**.
- 6 Navigate to the student data files and click the **Tolano Organization Chart.pdf** file. Press CTRL and then click the **Julie Neuman** item.

You should now have two files selected to include as attachments with this message.

- 7 Click **Insert**.

Reading and Viewing Messages

As you begin using email you will start to receive a variety of messages. Important messages may require immediate attention while others may contain general information that you can read later. Outlook provides different ways to scan and prioritize your messages.

Replying to a Message

Objective 2.1.4

You can respond to a message at any time. Depending on who was addressed in the message, you can reply to just the sender (Reply) or to all recipients of the message (Reply to All).

To reply to the sender without opening the message in a separate window, click the message and:

- on the Home tab, in the Respond group, click **Reply**; or
- press CTRL+R; or
- right-click the message and click **Reply**.

To reply to the sender from an open message:

- on the Message tab, in the Respond group, click **Reply**; or
- press CTRL+R.

To reply to all recipients without first opening the message in a separate window, click the message and:

- on the Home tab, in the Respond group, click **Reply All**; or
- press CTRL+SHIFT+R; or
- right-click the message and click **Reply All**.

To reply to all recipients from an open message:

- on the Message tab, in the Respond group, click **Reply All**; or
- press CTRL+SHIFT+R.

Forwarding a Message

Objective 2.1.4

If a message requires action from someone else, you can send a copy of the message that person using the **Forward** option. You can also customize the format or layout of forwarded messages using the **Stationery and Fonts** button in the Options for Outlook.

To forward the message to someone without first opening the message in a separate window, click the message to select it and:

- on the Home tab, in the Respond group, click **Forward**; or
- press CTRL+F; or
- right-click the message and then click **Forward**.

To forward the message to someone from an open message:

- on the Message tab, in the Respond group, click **Forward**; or
- press CTRL+F.

Learn to open and respond to messages

In this exercise you will open and respond to messages received, work with attachments and set other options.

- 1 Click **Inbox** in the Navigation Pane if not already active.
- 2 In the list, press F9 to activate the Send/Receive feature then click the **Budget for New Proposal** message.

The message contents display in the Reading Pane at the right of the screen. You should also notice the Reply, Reply All, and Forward buttons appear above the message so you can respond instantly to it.

- 3 Click the **Reply** button in the Reading Pane.

This notification appears as a result of requesting a receipt when the recipient has read the message you sent previously.

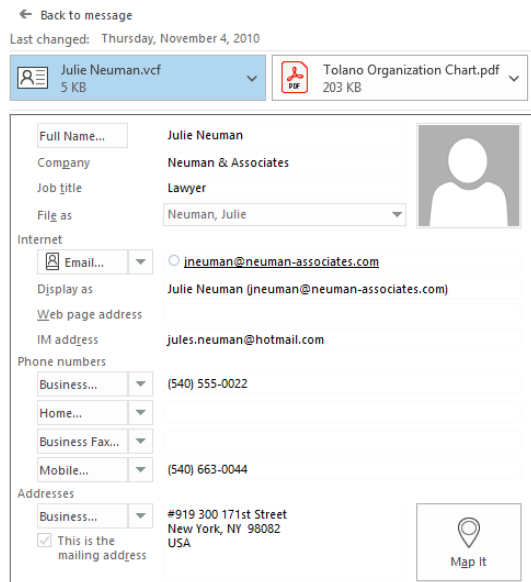
- 4 Click **Yes** to send the receipt back to Andrew, indicating you have read the message.
- 5 If necessary, enter the email address assigned to you in this class and then type the following:

I will schedule the meeting via Skype, for an hour in length.

Thanks!

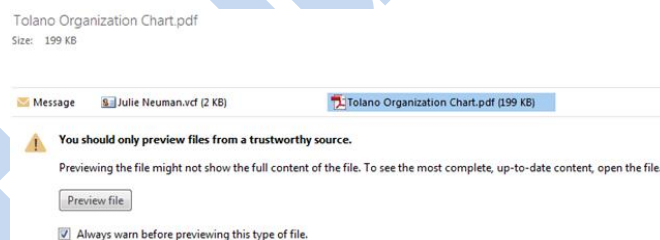
In addition to seeing the RE: text in the Subject field, you should notice that the original text of the message appears below your response. You may also notice [Draft] appears in orange at the left of the original message, reminding you that this message has not been sent yet.

- 6 Click **Send** to send the reply.
- 7 Point at the original message in the Inbox and right-click the flag icon.
- 8 Click **Add Reminder** and change the time to be approximately **10 min** from the current time. Click **OK**.
- 9 Click the **Org chart** message with the attachment icon.
- 10 In the Reading Pane, click the **Julie Neuman** attachment.



Outlook now displays the contents of this attachment because it is in a format that Outlook recognizes and can add it directly into the Contacts area.

- 11 In the Reading Pane, click the **Tolano Organization Chart** attachment.



In this case Outlook displays a message indicating it cannot preview the contents of the attachment automatically, and includes a warning to ensure the contents are secure prior to opening it.

- 12 Click **Preview file**.

Now that you have previewed the contents of both files, you can save them to your data file folder.

- 13 Click **Back to message** in the Reading Pane to return to the message contents.
- 14 Right-click either attachment file and then click **Save All Attachments**.
- 22 Close Word without saving this file.

Printing Messages

Objective 1.4.1

Sending messages to print provides you with a hard copy trail of conversations as well as the option to archive items for record keeping purposes. While keeping the messages online gives you the option to track conversations, there will be instances where a printed hard copy of the message is required.

To print one or more messages, select the message(s), click the **File** tab, and then click **Print**.

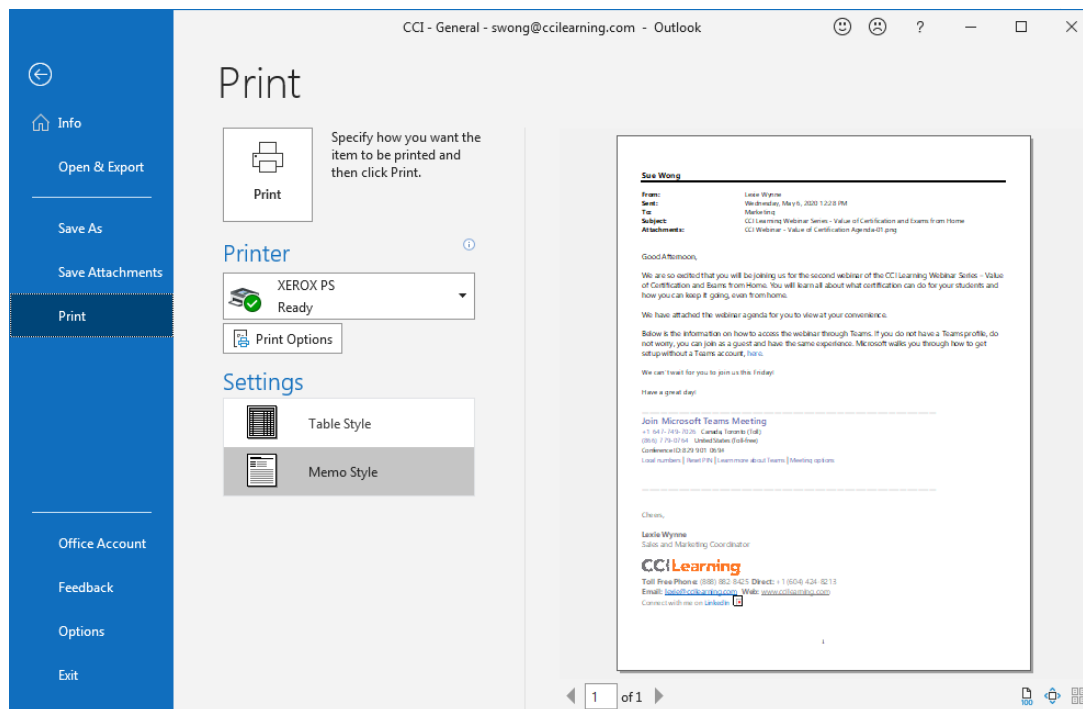




Figure 1-13 - Print

Outlook displays a preview of the message using the default print options:

- Use the middle panel to set up what is to print and from which printer. Click **Print Options** to set the printer options, as well as choose to print any attachments with this message.

Learn to print messages

In this exercise you will print some of the messages you received.

- 1 Click a message in the Inbox. Then click **File** and then click **Print**.
- 2 In the Settings area, click **Table Style**.
- 3 Click the  (**Actual Size**) button at the lower right corner to zoom into the list of messages.
- 4 Click the  (**One Page**) button to return to full page view for the message.
- 5 Click **Memo Style** in the Settings area to show only one message at a time.
- 6 If your teacher indicates, click **Print** to send this message to the printer.
- 7 Choose another message and try changing some of the options for the message.
- 8 Click the arrow at the top left of the window to exit the Print window.

Lesson Summary

Now that you have completed this lesson, you should be able to:

- use the Ribbon and Quick Access Toolbar
- use the Folder Pane and Peeks Bar
- configure mail settings
- compose, address, and format message text
- insert items into a message
- set message options
- work with attachments in messages
- read and view messages
- reply to or forward messages
- save and print messages

Key Terms

Term	Definition
Navigation Bar	The bar at the left side that displays a list of folders for storing messages, including the Inbox, Draft, Sent Mail, Deleted Items, and so on.
Peeks Bar	The across the bottom of the screen, above the Status bar that displays the components you can use in Outlook: Mail, Calendar, Contacts/People, Tasks, and More Options.
Address Book	Similar to a manual address box, this lists all the contacts in your Outlook, including a Global Address for the organization, as applicable. You can use this to select recipients to send messages to, copy, or blind copy.
Reminders	Set these when you want to be reminded to perform an action such as attend a meeting, complete a task, or send a message.

Quiz Questions

1. What is the purpose of the Navigation Pane?
 - a. This displays the list of recipients who sent you messages recently.
 - b. This displays the folders you can navigate to within Outlook.
 - c. This displays the various modules or mini programs available in Outlook.
 - d. This enables you to navigate to other Office applications without exiting Outlook.
3. Which character can you use to separate multiple email addresses in the To field based on the default settings?

a. / (slash)	c. . (period)
b. : (colon)	d. ; (semicolon)

5. How can you send an email to a new recipient not in your contacts list?
 - a. Click the To button to navigate to the Contacts folder and select the name.
 - b. Click the To button to select the name from an Address Book.
 - c. Type the name of the person or his/her email address in the To field.
 - d. Click Reply in the message from the contact you want to send email.
 - e. Paste the name from a message in the Contacts list to see it in the Address Book.

12. Why would you want to add a flag to a message?
 - a. To automatically move this message to an Urgent folder.
 - b. To remind you that an action is required.
 - c. To associate the message with a contact.
 - d. To change the text of the message to red as a reminder.

Evaluation Only