2010 Outlook Handout

Techedutainment Services

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Table of Contents

Table of Contents ***2***

Oops! and Legal Stuff ***4***

Introducing Greg Creech ***5***

The New Interface ***6***

Quick! Access the Toolbar **8**
The Quick Access Toolbar in Outlook 8

Productive Ribbon, but Where are the Bows? ***9***

Customizing the Ribbon – Your Own Tab and Groups **12**
Outlook's Custom Tab 12

The Return of File! ***14***
Outlook's File Tab 14

Outlook Options ***15***

General Pane **15**

Advanced Options **16**

Send Receive **17**

Mail Options **18**

Outlook's Format Text Tab ***20***

Keyboard Shortcuts and Key Tips ***22***

Outlook's Insert Tab **26**

Screenshot Editing and Clipping **26**

Outlook Insert Tab **29**

Lookout for Outlook's New Features ***31***

Outlook's People Pane **31**

Outlook Quick Steps **33**

The To-Do Bar **34**

Color Categories! **36**

Message Options Tab **39**

Home Tab **41**
At Home with Email 41
At Home with Calendar 42
At Home with Contacts 44

View Tab **45**
E-Mail Views 45
Calendar Views 48
Outlook Schedule View and Calendar Grouping 49

Contact Views....51
View Shortcuts....51
Send/Receive and Folder Tabs....52
Send/Receive....52
Folders....53
Printing in Outlook....54
Calendar....54
Contact....56
Organize and Automatic Formatting: Gone but Not Forgotten....57
Conditional Formatting....57
Index....59

Oops! and Legal Stuff

While I have made every effort to ensure the accuracy of this document, including grammar and instructions, I make mistakes. (Surprise!) If you find an error or want to provide constructive feedback, please contact me. Thank you! Enjoy Your new Office and this document.

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- ✓ Former National Speakers Association Member
- ✓ American Society of Training and Development Member
- ✓ Society for Human Resources Management
- ✓ International Association of Administrative Professionals
- ✓ Georgia Municipal Association

Word ® is a most excellent product from Microsoft ® Corporation and is part of the Office ® Suite (including Office 2007/2010 ® of products and services, including Excel, PowerPoint, Access, and other fantastic programs that help me to be productive and profitable.

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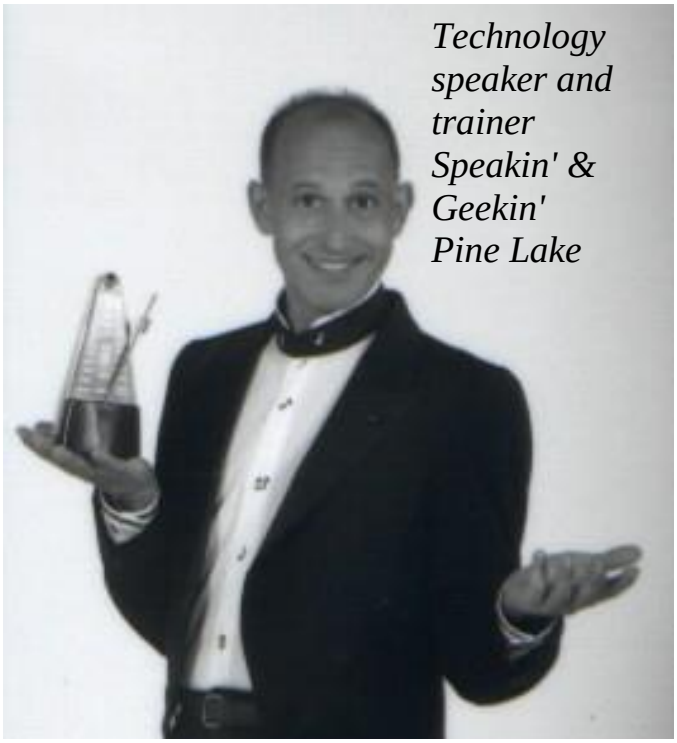
Introducing Greg Creech

Shop Talk from The Atlanta Journal-Constitution

Sunday, Oct. 29, 2000 **R3 - JOBS**

Why I Love my Job – Greg Creech

What I Do: I teach technology courses and make presentations to beginner and expert computer users and professionals. I use humor and the piano. I train all levels from first-time computer users to systems technicians acquiring A+ certification. As an A+ certified trainer, MOUS expert, and technical trainer, my certifications and knowledge give me a career in the technology. My humor, the piano, and people keep me in the technology training field. I sing to my students sometimes and perform stand-up comedy about computers.



Technology speaker and trainer Speakin' & Geekin' Pine Lake

How I got started: I won Best Actor in a Supporting Role at Southside Theatre Guild for *"A Funny Thing Happened on the Way to the Forum"* and studied comedy under Jerry Farber. I have played the piano since 8 years of age and had the first personal computer with a 1 MB of memory. In order to learn the PC, I associated the PC with the piano -- both use a language to translate, both have keyboards, and now - both provide music and information. I must admit I miss the days when I only played the piano and programmed the PC. Now, I play the PC and have to program my piano. In 1998 after seventeen years of technology business experience in the corporate market, I decided to take a leap of faith on my own. I call my presentations "Showminars," a combination of a show and a seminar.

Greg Creech sings to his students, and often he performs stand-up comedy about computers.

The Best Part: Hearing the laughter and the comments: "You have saved me so much time," and "I remember complicated macros because of the way you taught them." I have a passion for teaching creative people to be more technical and technical people to be more creative – Mozart would be proud!

The Challenging Part: Explaining why I want my piano in a PC classroom. "Mainframers" who refuse to acknowledge the existence of the PC and the Web. People who attend training classes because they have to, not because they want to. Technical people who are not client- focused.

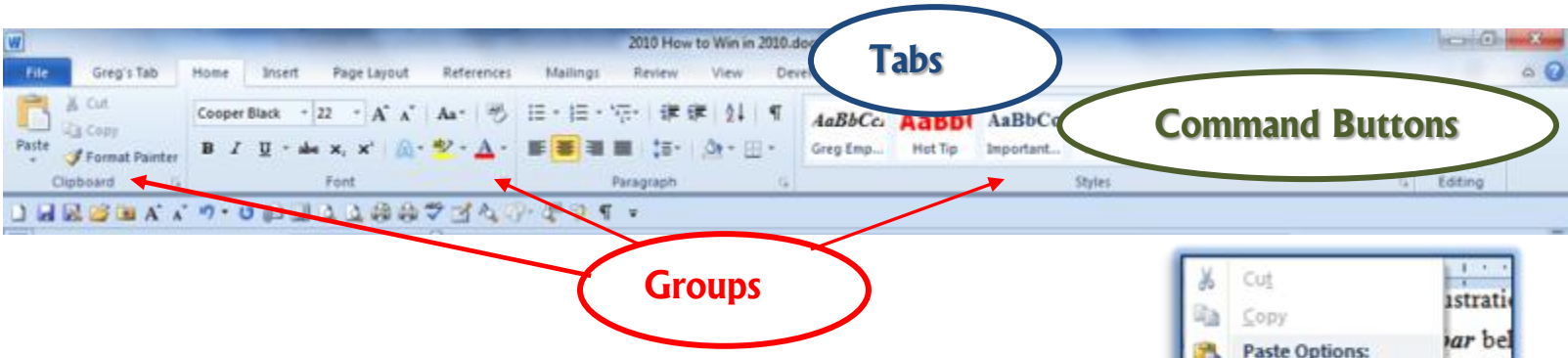
My Favorite Quotes: "To err is human, to really mess things up you need a computer." "Forty-two percent of all households have a computer; only eight percent of those know how to use it."

What Keeps me Going: I enjoy combining my love of people, the piano, processors, and humor into a unique speaking and learning experience.

Welcome!

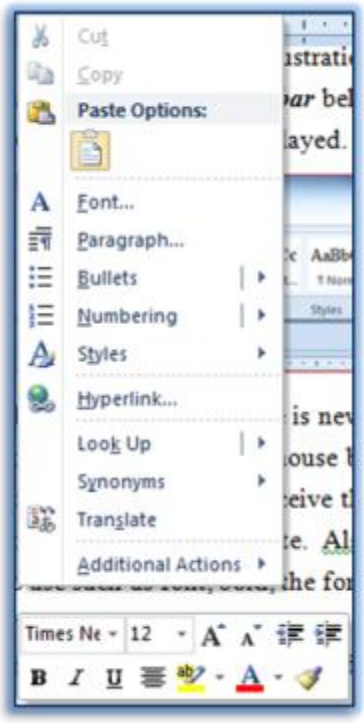
The New Interface

One of the best new features of ***Office 2007/2010*** is the new ***user interface*** including the ***Quick Access Toolbar, Tabs, and Ribbon***. Microsoft calls this type of interface a results-oriented interface and I must agree – you truly will get to your desired results, effects, and functionality with less time and minimized frustrations – for the most part. The number of ***dialogue boxes*** has decreased and ***Task Panes*** are still around to assist you. The good old toolbars, such as Standard and Formatting, that us old-timers have used since the early 1990's are gone, except for one – the new ***Quick Access toolbar***. Without a doubt using the new Office Suite will increase your productivity and make getting to functions much easier and with fewer clicks and less frustration. The ***Home Tab*** in ***Word 2010*** displays here with the ***Quick Access Toolbar*** below the Ribbon and



above the Ruler and the ***Home Tab's Groups and Command Buttons*** displayed.

Besides the increase functionality using the ***tabs*** and ribbon, there is new power in using the shortcut menus with "right clicking" or using the secondary mouse button. When you "right click" or use your secondary mouse button you still receive the ***Shortcut menu*** including some of your favorite commands, such as copy and paste. Also you receive a ***Mini Toolbar*** containing favorite commands to use such as font, bold, the format painter and other often used commands. This is another time saving feature for applying formatting to selected areas of your document, spreadsheet, presentation and other Office files.



There is the new scrolling ***Zoom***, replacing the ***Zoom box***, in the status bar of all applications that changes your view as you scroll through your percentages. A picture of the new scrolling zoom is at right and allows you to see your changes in "real time" rather than guessing the percentage you need.

Office 2007/2010 offers a preview of your formatting, too, such as when you select your text and scroll through the fonts or font size the application will show you the effect changes before you make your final click or selection. This feature is called ***Live Preview*** and saves a lot of time.

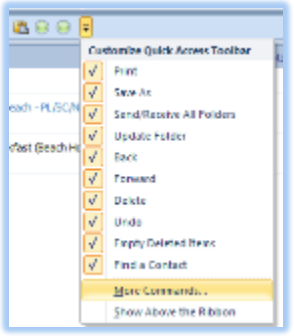
We will examine these ***new user interface features*** and new ways to getting to old functionality, such as how the tabs and ribbons work in using popular formatting options for your documents, spreadsheets, and emails. We will look at common features across the new Office 2007/2010, such as the ***return of File in Office 2010, Customizing the Ribbon,*** and ***the Quick Access toolbar***. Then we will examine some of the new functionality in Word, Excel, and Outlook using the new interface.

Welcome to your new office, now let's get familiar with our new surroundings, and interface.

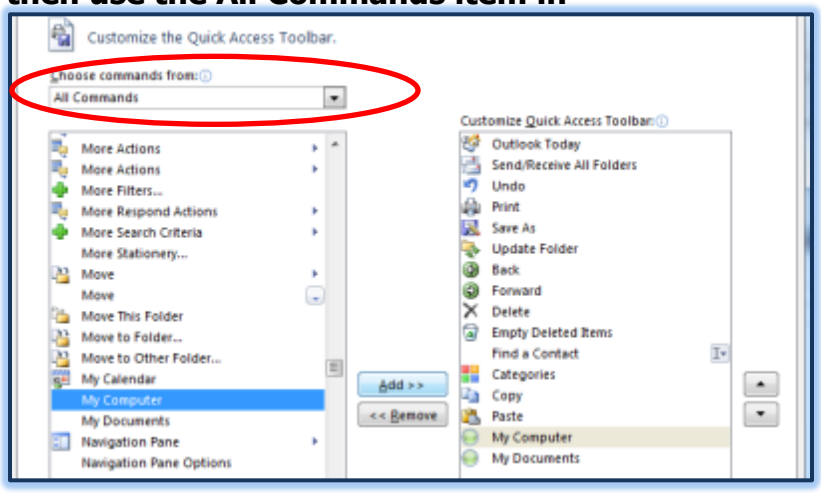
Quick! Access the Toolbar

The Quick Access Toolbar in Outlook

1. **With Outlook open, Click the Quick Access Toolbar's Option arrow and add the buttons from the shortcut menu as displayed here.**
2. **After adding the buttons from the shortcut menu, Click the arrow again and at the Customize Quick Access Toolbar click the More Commands… option.**



As we accomplished in Word and Excel, add your favorite Outlook buttons using the Popular Commands item in the Choose commands from: box and then use the All Commands item in the Choose commands from box. Here are some of my favorite commands to add to and rearrange on my Outlook Quick Access Toolbar:



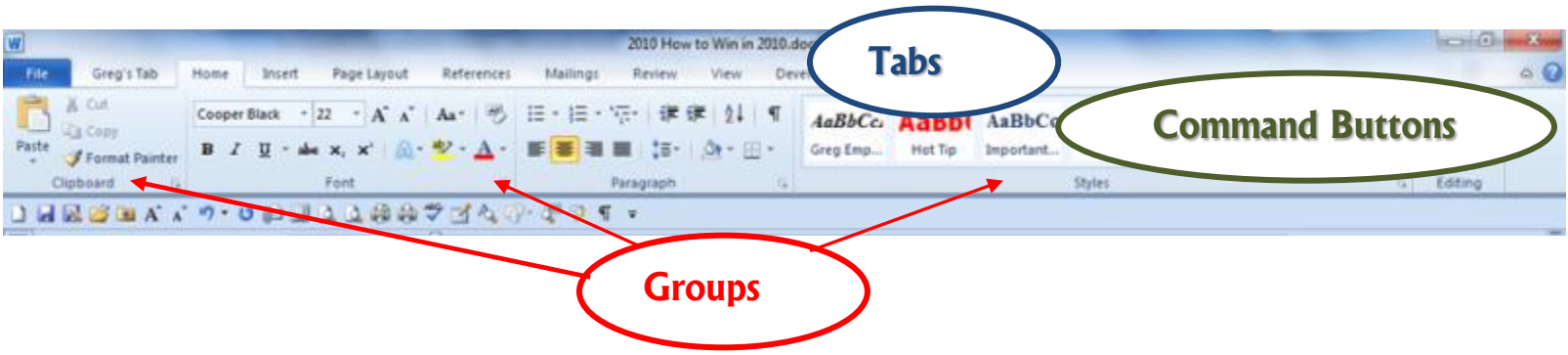
- ✓ **Outlook Today**
- ✓ **Categories**
- ✓ **My Computer**
- ✓ **My Documents**
- ✓ **Copy**
- ✓ **Paste**

Click Ok.

Now, that we have customized our Quick Access Toolbar it is time for us to customize our Ribbon with our own Tab – A Terrific New Feature in Office 2010.

Productive Ribbon, but Where are the Bows?

The ***Home Tab*** appears above. The ***Ribbon*** is composed of ***Tabs, Command Buttons*** (aka Icons), and ***Groups***. As you can see, the ***Ribbon*** is packed with Command buttons,



menu items, and are organized in a logical manner. However, getting accustomed to where your previous icons, menu items, and other shortcuts from previous versions of ***Office*** is a bit challenging. Here's an example of how my old habits in the applications are hard to change, and I bet you will experience the same. The ***Views*** in Word and PowerPoint have always been at the lower left corner of your screen – now the ***Views*** in Word and PowerPoint have moved to the left of the screen – a simple rearrangement, but I can't count the number of times I still go to the lower right part of my screen to change a view and then realize OOPS! the views have moved on me.

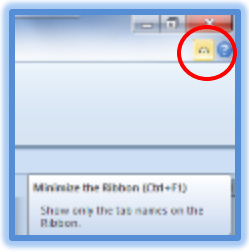
An Important Note ♬ - Your screen resolutions will affect the number of commands you may see in a group. The lower the resolution your computer is set the fewer commands you may see – the group will display an arrow for you to expand and view the commands. The higher the resolution the more commands you may view in a group without the need to expand the group. For example, with my screen resolution set at 800 x 600 my Editing Group required me to expand the group in order to view and use the commands. With my screen resolution set at 1024 X 768 my editing group displays the Find, Replace, and Select Commands. You may change your resolution settings using the Display Properties and the Settings Tab in Windows XP.

Microsoft's Office 2007/2010 ***Ribbon*** is productive, beautiful, and combines our previous toolbars, menus, and task pane features in a much easier and a more powerful way of working with the applications. As a 25-year veteran of using these products, I got excited when we moved from command menus to icons, now we can have the best of all

of the worlds with ***The Ribbon,*** especially the ability to customize ***the Ribbon*** in Office 2010 as we accomplished earlier. I think you are going to find the ***Ribbon*** a bit confusing at first. For me, old habits die hard and I had to accustom my life and work without the Menu bar and Standard/Formatting Toolbar. And the ***Live Preview Feature*** introduced in Office 2007 that displays your selected text's new format based on hovering your cursor over a style, font, or size "freaked" me out at first. However, once I worked with the new Ribbon and features that pop out of nowhere or are enhanced greatly, such as the new ***Mini Toolbar*** that appears with your ***Shortcut Menu*** when you right-click, I find it difficult to use previous versions of Office. The 2007/2010 version of Office is much easier to use and to teach than any other version, especially for our youth and those new to ***Microsoft's Office***. Here's two neat ways of increasing your productivity using ***the Ribbon.***

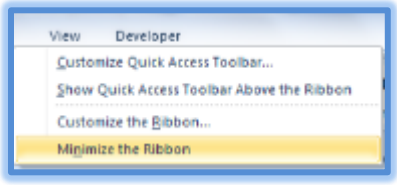
Two important and time saving Hot Tips for you in using the Ribbon and Tabs!

Hot Tip 1: Minimize the Ribbon! Four ways to minimize the Ribbon – First, the Ribbon takes up a lot of space on your screen. You may minimize the Ribbon and use it only when you click on a Tab.



1. Office 2010 has the new Minimize Ribbon arrow at the top of your window next to the Help button. The Minimize the Ribbon button appears at right. With the Ribbon minimized the button becomes the Expand the Ribbon button.

2. To minimize the ribbon double click the *active* Tab's Name. Double clicking a tab expands/minimizes the ribbon, too.



3. Right click on any tab or command button on the Ribbon and from the short cut menu choose Minimize the Ribbon at the bottom of the menu.

4. Keyboard shortcut of CTRL + F1 – when you press your CTRL (Control) and the F1 keys simultaneously on your keyboard the Office application minimizes and expands your Ribbon, too.

Why minimize The Ribbon? The Ribbon takes a lot of space. With the Ribbon minimized you have more room in which to work on your file. With the Ribbon minimized, to use a tab, you

click the tab and the Ribbon's tab expands for you to use the Command Buttons. After clicking the button you want and you click back into the body of your document, worksheet, or presentation the Ribbon minimizes again. This is similar to using the old Menu bar. The difference is the Menu bar was vertical and text oriented and the Ribbon is horizontal and more graphically oriented.

☛ Hot Tip 2: Second, if you have a scroll wheel/button on your mouse and the Ribbon is NOT minimized, you may scroll through the different tabs rather than clicking the tab. Moving your cursor to the Ribbon and rolling your scrolling button/wheel up or down changes the tabs for you! You must first click on a tab for this to work; otherwise, the application will scroll through your file – not the Ribbon. ☚

☹ An Important Gotcha**!** With the Ribbon minimized you cannot scroll through the Tabs as described above. You'll have to maximize the ribbon in order to scroll through your tabs and command items. ☹

Try these two shortcuts, I think you'll like using these two features in Office 2010.

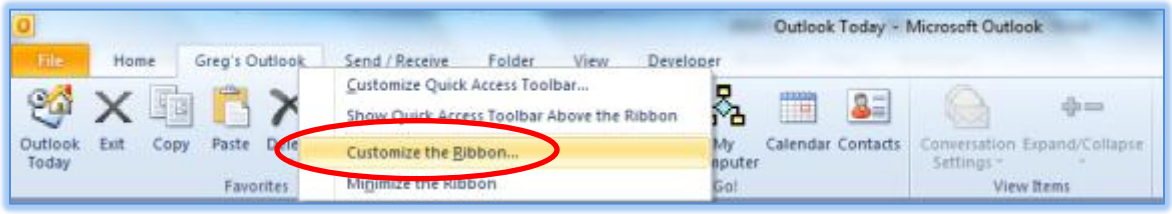
Customizing the Ribbon – Your Own Tab and Groups

One of the disadvantages of Office 2007was the inability to customize the ribbon and add your favorite and popular command buttons to your own tab as you could create toolbars and add your icons in Office 2003 and its predecessors. With Office 2010 you can create your own tab and groups then add your favorite command buttons. We'll build our own tab with often used command buttons, now.

Outlook's Custom Tab

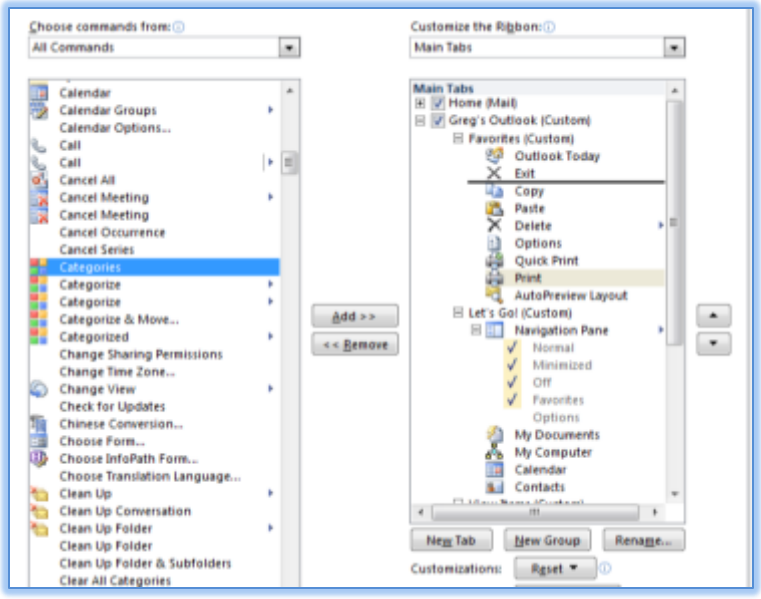
The process of creating and customizing your tab and groups in Outlook is the same as in Word and Excel only the type of commands that we want differ. We will create a tab and a group and add some of our favorite Outlook buttons to it.

1. **Activate your Customize Ribbon pane in your Outlook Options by right clicking on a Tab on the Ribbon and Clicking Customize the Ribbon from the shortcut**

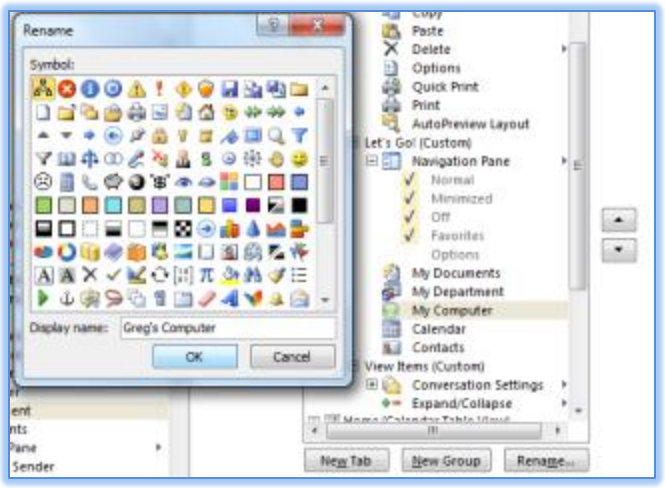


menu as displayed here with my Custom Tab named Greg's Outlook.

2. **Create a New Tab by Clicking the New Tab button at the bottom of the Customize the Ribbon pane and then rename the tab – I am naming my tab - Greg's Outlook.**



3. **Next create a New Group and rename the group. I have created a Favorites, Let's Go, and View Items groups.**
4. **Create and rename other groups if you wish.**
5. **Change your Choose commands rom box to All Commands. Outlook alphabetically shows ALL of the available commands. I am adding the Categories button to my Favorites Group on my Tab by clicking and dragging the button from the left part of my screen to the right part of the pane illustrating my Tab and Groups. I am placing the button under Exit and above Copy.**



6. **Similar to the Quick Access Toolbar I add my Outlook Today, Copy, Paste, My Documents, My Computer, and other important and often used Outlook Commands. You should add the buttons and groups as you use Outlook and have your favorite commands in one place.**
7. **Also, I like changing my buttons especially for My Computer and My Documents. After adding the button, I select the button and then click the Rename button. While I can change the name of the button through the Display name box, I can change the picture or icon for the command, too. I am using the first button (the robot) for and I'm changing the button name to Greg's Computer. Click OK.**
8. **After customizing your tab, groups, and command buttons, Click OK. You have your own, productive Tab in Outlook to use in all of the objects and items in Outlook.**

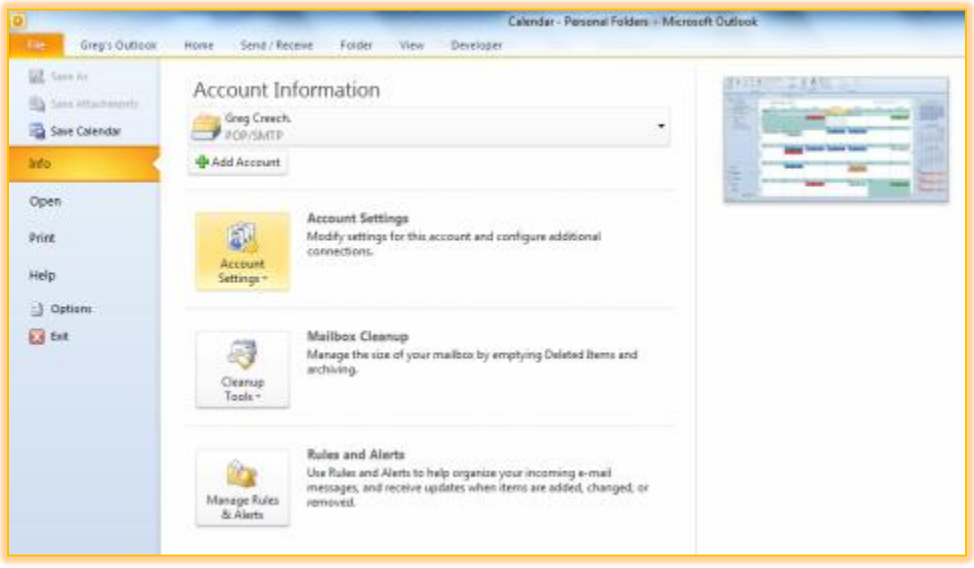
☹ An Important Gotcha! In Outlook, your custom tab will not display in some of the items, such as New Message, New Appointment, etc. and your Quick Access Toolbar changes, too. ☹

The Return of File!

There were many improvements in ***Microsoft's Office*** with the release of Office 2007; however, using the ***Microsoft Office Button, pictured at right,*** instead of good, ol' ***File*** was not one of the improvements and therefore disappears (YEAH!) with Office 2010. A ***File Tab returns bigger and better than ever***.

Outlook's File Tab

With some many different types of objects and items in Outlook, the ***File Tab*** in Outlook is different and will change based on the type of object and item in which you are working in Outlook. My ***Info Pane*** appears here; this pane contains the ***Add Account*** and ***Account Information item*** for you to view your ***Account Settings*** and edit/change them from the subsequent menus. Outlook's ***File Tab*** doesn't contain the ***Recent pane*** nor the ***Save***, ***Save As***, and other commands found in Word, Excel, PowerPoint, Publisher, and Access.



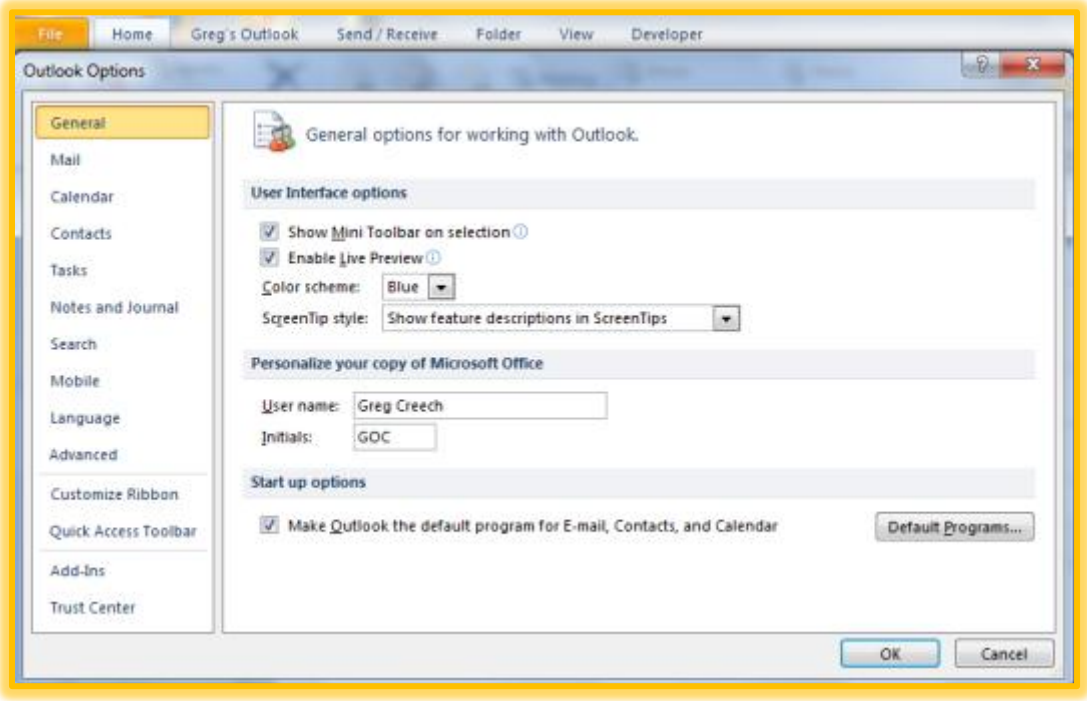
Outlook Options

General Pane

Outlook Options have been disorganized since Outlook Version 1.0 and the previous menus and organization were cumbersome. ***Outlook 2010 i***mproves the organization and the interface for accessing many important and fundamental options that affect Outlook overall. In my LookOut! Outlook 2010 course I cover all of these options, so this section can only permit some of the important options that you will want to know and review.

With Outlook 2010 open, click the File Tab and then click the Options item at the bottom of the left pane above Exit.

Your ***Outlook Options*** pane opens at the ***General pane***. This is similar to other Office applications with your ***User name, Show Mini Toolbar on selection, and Color scheme.*** You should set your preferences here for ***Outlook***. I also make sure I make ***Outlook*** my default program for my E-mail, Contacts, and Calendar.

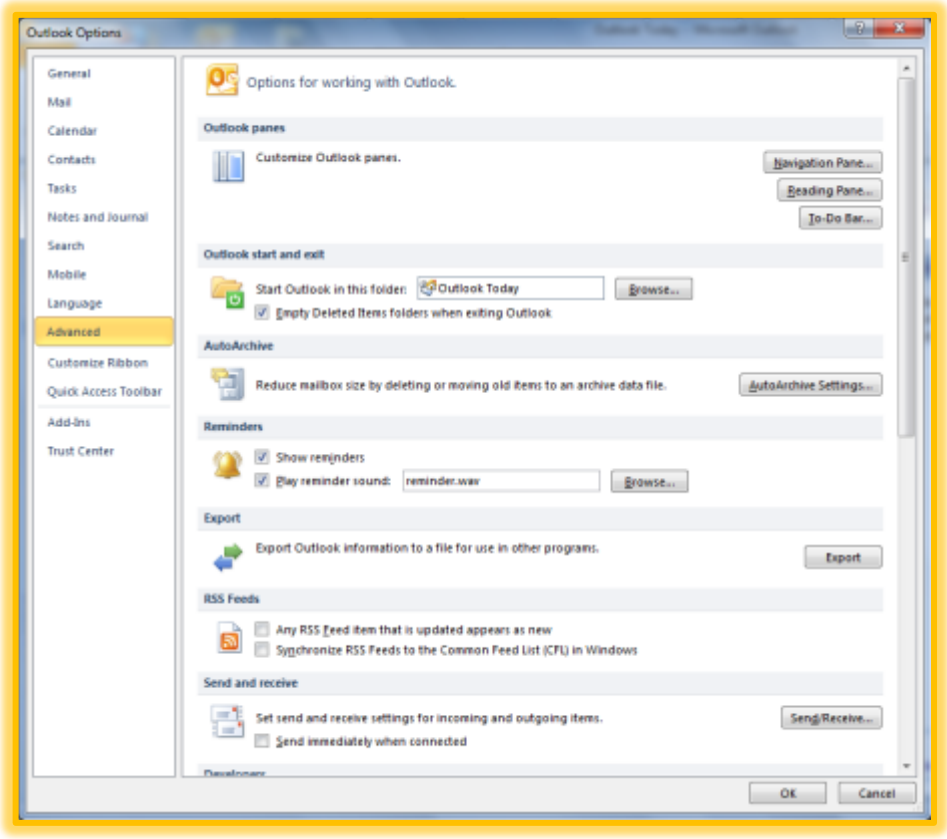


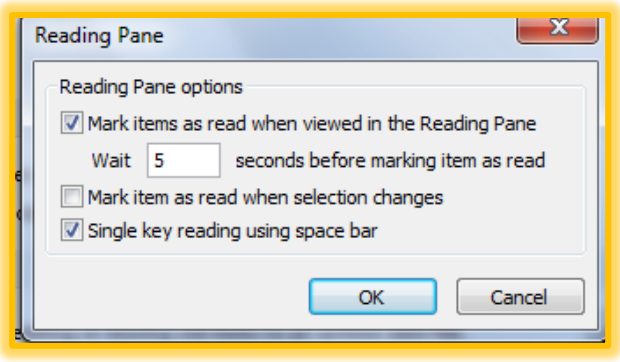
The ***Outlook Options*** pane has several items that we have studied thus far, such as ***Customize Ribbon*** and ***Quick Access Toolbar***. I will overview some of the important items starting with ***Advanced*** and ***Mail Options***.

Advanced Options

The Advanced options are not advanced at all and contain some of the most important settings that guide your use of Outlook. You will want to review these options and set them as you convert to Microsoft's Outlook 2010.

1. **With your Outlook Options open, Click the Advanced item.**
2. **You should review the Outlook panes and set those options. We will review these in detail in a later section particularly the To-Do Bar. There are other ways of quickly accessing your Navigation, Reading, and To-Do bar options which we will learn later. Pictured here are the Reading Pane Options which I make sure I change the option of moving from one message to another – I accidentally change messages from Read to Unread by moving my cursor. I like using the first option of marking my messages as read after a minimum of 5 seconds – that gives me time to preview the message and decide if I need to open it.**

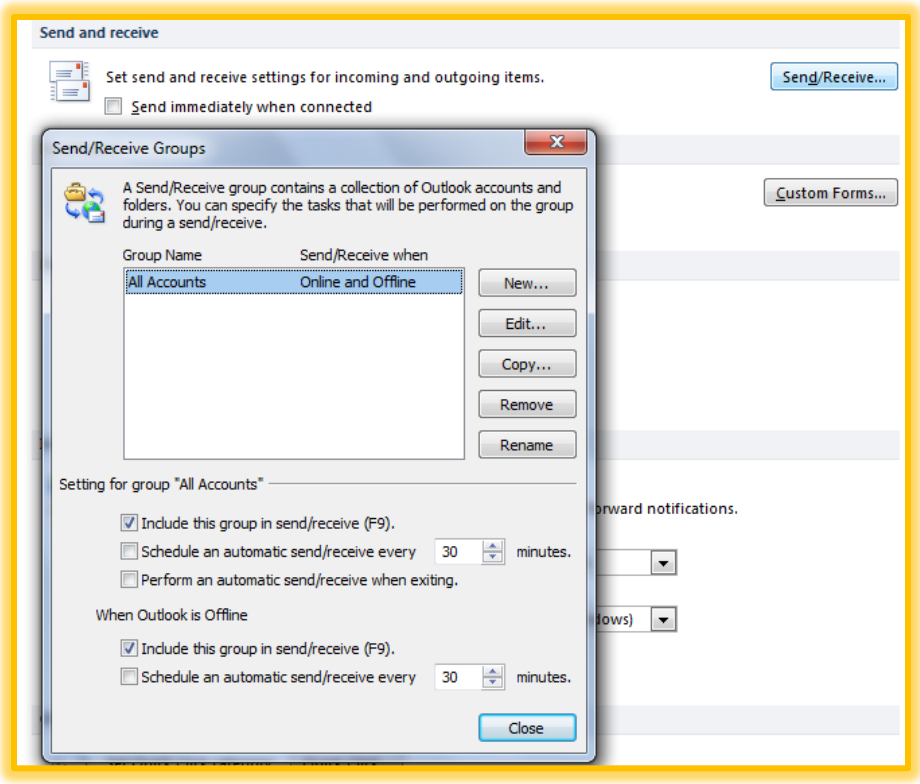




3. **Set your options here if you like**

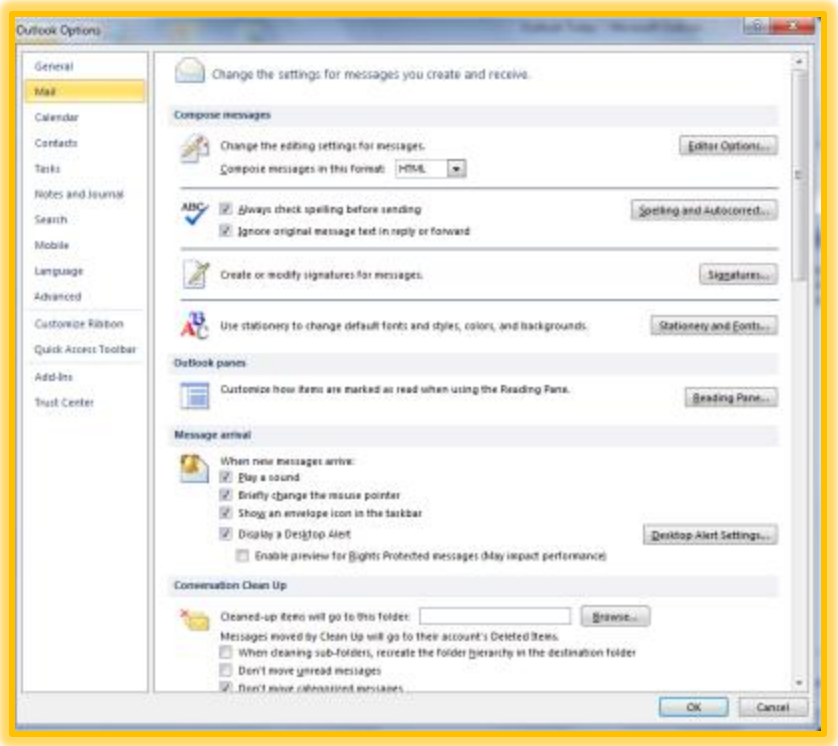
Send Receive

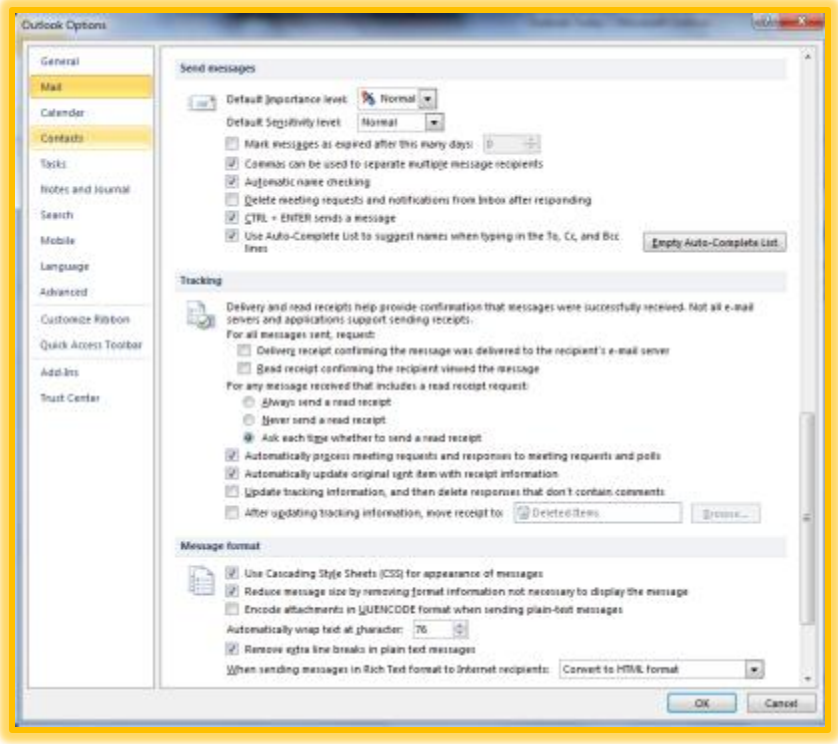
You will want to review and set your Send Receive Options, too. Activating the Send Receive Groups dialogue box by Click the Send/Receive … button on the Send and received section of your Advanced Options allows you to schedule your Send Receive and perform other important settings for you.



Mail Options

Your ***Mail Options*** are packed with all sorts of items for review for formatting and managing your email messages and folders. Some of the items that you want to know are:





1. **<u>Signatures</u> – providing information at the bottom of all your email messages,**
2. **<u>Message arrival</u> – setting how you want to know about incoming messages – I have all of my options chosen and I modified my Desktop Alert through the Desktop Alert Settings so my desktop alert remains in view for a longer period of time.**
3. **<u>Send messages</u> - This section provides ways of setting your Importance and Security Levels on ALL of your messages, using commas instead of semi-colons to separate your email addresses, and I have unchecked the *Delete meeting requests and notifications from inbox after responding* because I like to keep**

this message for future reference and assistance. I certainly like using my keyboard short cut of CTRL + Enter to send a message and I have Outlook suggest names in my to, cc and bcc address lines. I haven't needed nor wanted to Delete my Auto Complete List History.

4. **Tracking – This allows you set your Delivery and Read Receipts for ALL of your messages; there are options that allow you to only set Delivery and Read receipts for specific messages which is what I use. This section provides ways for you to determine how you respond to read receipts, too.**

You should review the other ***Outlook Objects'*** options, too, to set your ***Calendar***, ***Contacts***, ***Tasks***, and other items in Outlook. I cover these in detail in other Outlook courses.

Outlook's Format Text Tab

The Outlook's ***Format Text Tab*** allows you to change your font, paragraphs, styles, and other attributes of your text and words in your ***Notes*** area and body of your Email, Contacts, Appointments, and Tasks. Remember you may use your ***Mini Toolbar*** for formatting as well, especially when you are working in another tab – the ***Mini Toolbar*** is particularly helpful. The ***Message Tab*** in Email messages contain formatting for your in the Basic Text group. Here's an overview of the Format Text Tab and the Groups.

Clipboard – This Group contains the important cut, copy, paste, and Format Painter. Theses buttons allow you to move and duplicate your text, items, or objects and to copy your formatting of your text. The Dialogue box launcher will activate the Clipboard Task Pane for you to add items as you cut/copy from the web or other applications.

Format – This Group only appears on the Email object and is not included in the Format Text Tab for Appointments, Tasks, and Contacts. This Email Group allows you to change to overall format of your Email message – the Default is HTML, but based on your email server and that of the person you are communicating you may change this to Plain Text or Rich Text.

Font – This Group allows you to format your selected text with a different font, font size, bold, italics, underline, and case. There are many other options for you by clicking the Font Dialogue box, which provides a dialogue box for other formatting attributes.

Paragraph – Affects your paragraphs for bullets, numbering, outlines, indents, spacing, and alignment of your text. Like the Font Group, the Paragraph Dialogue box launcher activates Dialogue boxes for you to use to format your paragraphs further.

Styles – Styles are predefined formats and create a structure and attractive appearance of your text using the Headings. You may change your Styles, Colors, Fonts and other attributes using the Change Styles command button and menu. The Dialogue box launcher here activates your Styles task pane to use instead of the style gallery.

Editing – This Group allows you to find and to replace certain text within the Notes area or body of your email, appointments, and tasks. The select object allows you to select or highlight objects that are behind your text or to select text with similar formatting.

1. **Create a new message, contact, or calendar item and enter text in the notes area. After entering text, select the text and practice using the items in the Font and Paragraph group for formatting your text, including creating a bullet list.**
2. **You will find the Format Text Tab very similar to Word's Home Tab.**

Keyboard Shortcuts and Key Tips

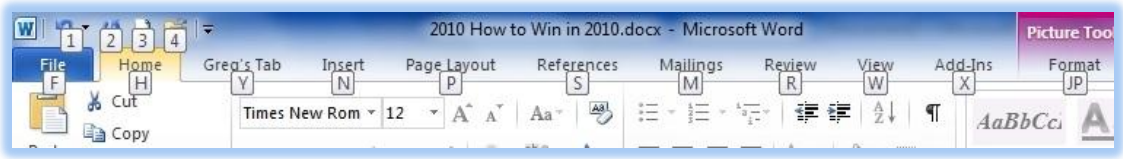
Now, that we are familiar with the ***Home Tab's*** formatting let's look at cut, copy, and the paste options available as well as editing. Since the menu bar is gone, the Edit menu items are concentrated in the ***Home Tab,*** including find and replace. The good old ***keyboard shortcuts*** are still available and are popular with many users. Here are the ***Editing*** common keyboard shortcuts using the Control (CTRL) Key and the corresponding keys:

Keyboard shortcut		Command
CTRL + A		**Select All**
CTRL + B		**Bold**
CTRL + C		**Copy**
CTRL + D		**Word – Font Format** **Excel – Fill Down** **PowerPoint - Duplicate** **Outlook – Delete in Main interface** **Outlook – Font Format in Notes section of objects**
CTRL + E		**Word and PowerPoint Center Alignment – Paragraph** **Excel – Unassigned /Doesn't work**
CTRL + F		**Find**
CTRL + G		**Go To**
CTRL + H		**Replace**
CTRL + I		**Italic**
CTRL + J		**Word and PowerPoint Justify Alignment – Paragraph** **Excel- Unassigned/Doesn't work**
CTRL + K		**Insert Hyperlink**

CTRL + L		**Word and PowerPoint Left Alignment – Paragraph** **Excel-Unassigned/Doesn't work**
CTRL + N		**New**
CTRL + O		**Open**
CTRL + P		**Print**
CTRL + R		**Right Align**
CTRL + S		**Save**
CTRL + T		**Excel Create Table** **Word Hanging Indent**
CTRL + U		**Underline**
CTRL + V		**Paste (The Paste icon will appear offering you popular options, such a Match Destination formatting)**
CTRL + W		**Close – Closes the Workbook in Excel, the Document in Word, and the Presentation in PowerPoint**
CTRL + X		**Cut**
CTRL + Y		**Repeat Last Action**
CTRL + Z		**Undo**
ESC		**This key cancels the current command or operation.**

There are other keyboard shortcuts still around, too**.** You can use the help system in each application for a list of all keyboard shortcuts that perform a variety of operations for you, just type Keyboard Shortcuts in the ***Help Search Box.***

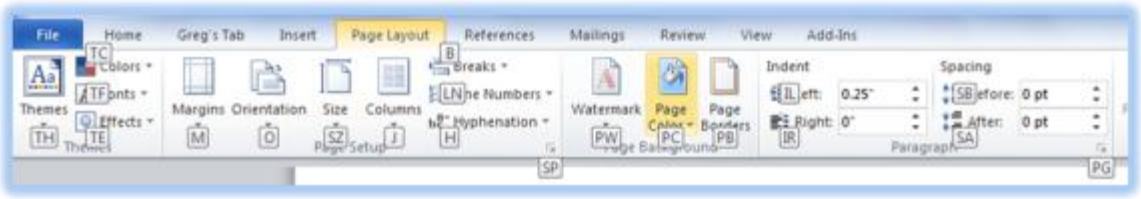
Now, new to Office 2007/2010 are keyboard shortcuts called ***Key Tips***. To activate your ***Key Tips***, press the ***ALT*** key or ***F10 key*** on your keyboard.



Office displays screen tips or Microsoft calls these badges pictured here. To activate a Tab press your ***ALT*** key to activate the ***Key Tips*** and then press corresponding badge key, for example press ***ALT then H*** to activate the ***Home Tab*** and the badges for this tab's commands.

Let's try this in 2010 Word.

1. **Open Word Manual file.**
2. **Press your Alt key to activate your Key Tips or you may press the Function 10 (F10) key on your keyboard to display the Key Tips.**
3. **With your Key Tips visible, press the P key to activate the Page Layout Tab. Notice that Word places Key Tips on all of your commands on the Page Layout Tab.**
4. **Press the O key to activate your Orientation commands and**



choices.

5. **Press the Down Arrow to select Landscape and then the Enter key for Word to accept you command. Your document turns into Landscape Orientation.**
6. **Now, Press ALT or F10 to activate your Key Tips. Press P for Page Layout, O for Orientation, and Portrait should select. Finally, press enter to return your document to Portrait.**

7. **Select a Paragraph in your Word Manual document, then press your ALT key to activate your Key Tips and then H key to activate the Home Tab. Word 2010 activates your Home Tab with all of the Key Tip badges for you to use. Notice you can press 1 to Bold**

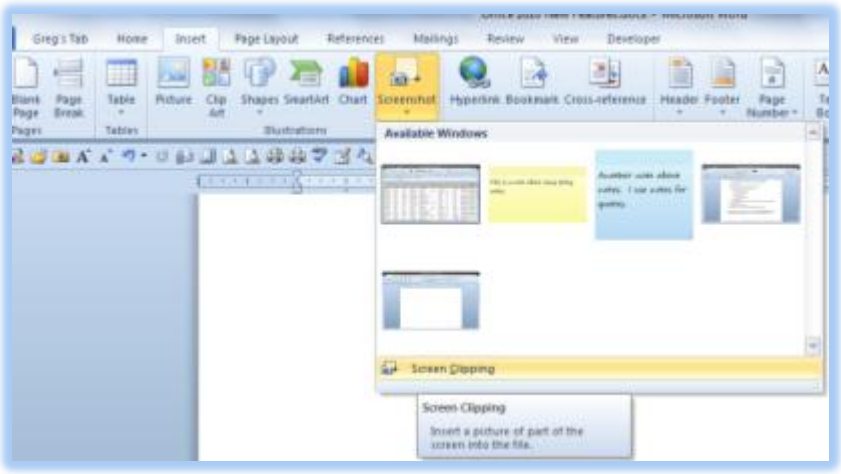
selected text, so now you may use CTRL + B or ALT+1 to Bold your selected text. The difference in using CTRL commands and ALT Key Tips is you must have the Key Tip badge displayed to use the command.

8. **Finally, Activate your Key Tips Press the Key Tip for Undo and press enter to Undo your Bold.**

Outlook's Insert Tab

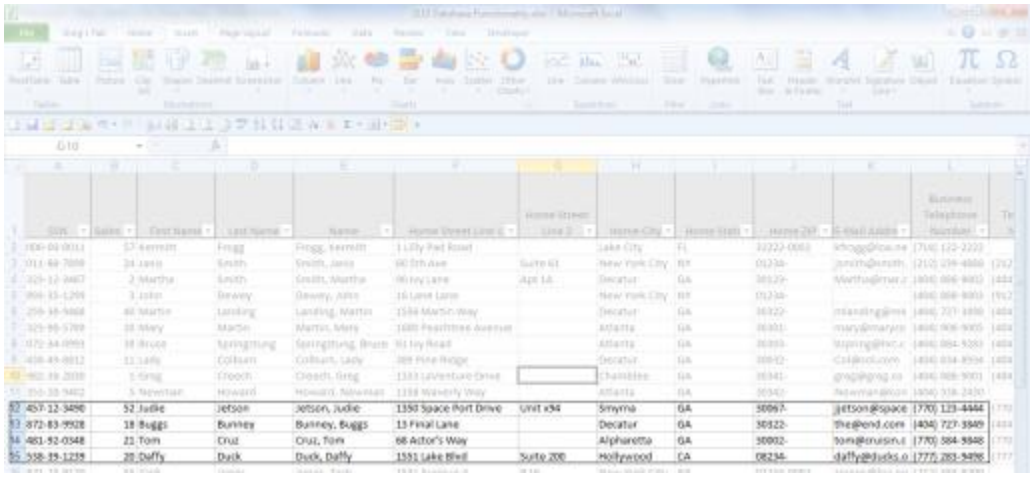
Screenshot Editing and Clipping

Wow! What an Improvement – as a writer and specifically a technical writer I use many screenshots in my documents as you can tell from this manual. The process required several steps in the past or the use of a third party vendor to accomplish robust and quick screen shot editing and use. Office 2010 provides ***Screenshot editing*** built into the applications.



With files and programs open and active, you may use the ***Insert tab*** and ***Screenshot***.

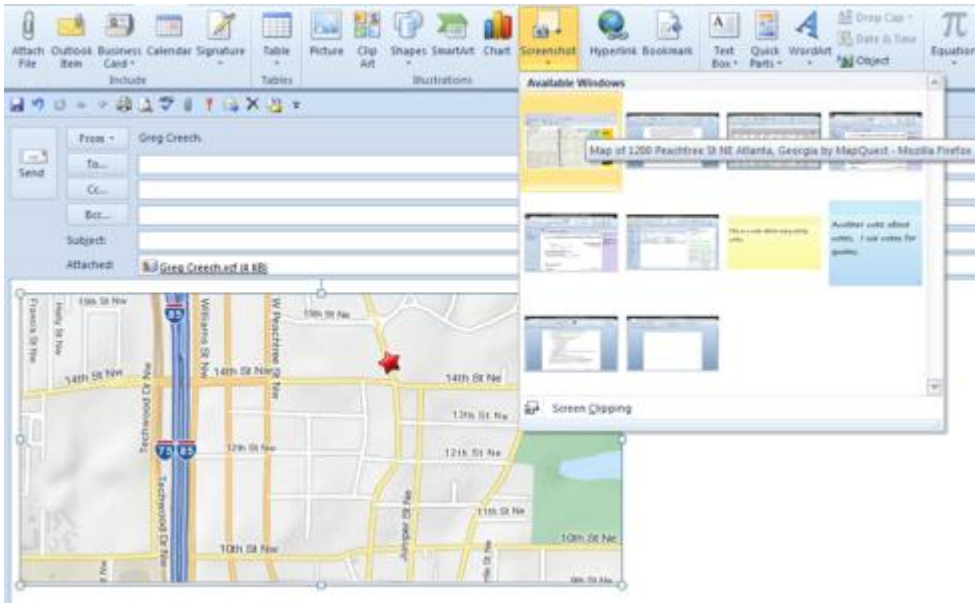
I like using ***Screen Clipping*** because whichever file you were previously working you may click ***Screen Clipping*** and the previous file opens and dims for you to click and drag the area that you wish to insert your ***Screenshot***. If you simply click the item in the ***Available Window*** menu, the entire screen inserts into your file. After the insertion then you will need to perform any formatting, such as cropping and resizing.



As an example, I open an Excel workbook with a listing of clients; this file appears first in my list of ***Available Windows***. As displayed above I am

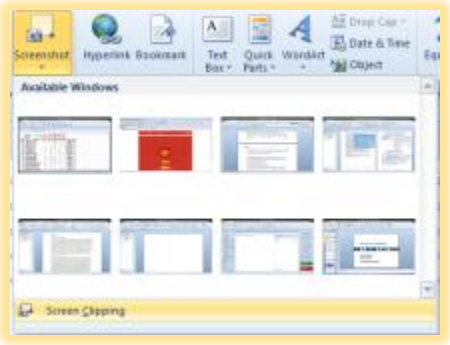
choosing ***Screen Clipping*** and since I was in the Excel worksheet last, Office opens my Excel worksheet and dims for me to click and drag to select the area I want to insert into the document as displayed here. After I click and drag the area and then release my mouse button, this area automatically inserts into my Word document!

In Outlook, I want to insert a portion of a map for a client that is "directionally challenged" (a man no doubt). After using a map program to locate the address, I open Outlook and a new mail message. I click the ***Insert Tab*** and ***Screenshot***. The first item in the ***Available Windows*** is the map. When I click ***screen clipping*** Outlook minimizes and the mapping web application activates for me to choose the area I want including in the email. After clicking, dragging, and releasing my mouse button, the area inserts into my email message as displayed here. This saves a lot of time, especially for all of the screenshots you see in my manuals and books.



If you have Windows 7 there is a nice Snipping Tool that you may use as well. The ***Snipping Tool*** allows you to Snip your Desktop and other items that may not include in the Office screenshot. You may use this feature for error messages and other alerts from your computer to email to a technical support person.

☹ An Important Gotcha! You may not (actually CAN NOT) have your files/applications minimized to view in the Screenshot menu. Your files must be open, active, and not minimized. ☹



Let's Practice using this new feature.

1. **Open Outlook and create a new email message.**
2. **Next Open Excel and the Track Workbook. Sort**

the worksheet by customer name we only want to send ABC information to the client as a screenshot in the Email message. After sorting your table alphabetically by client, return to your Email.

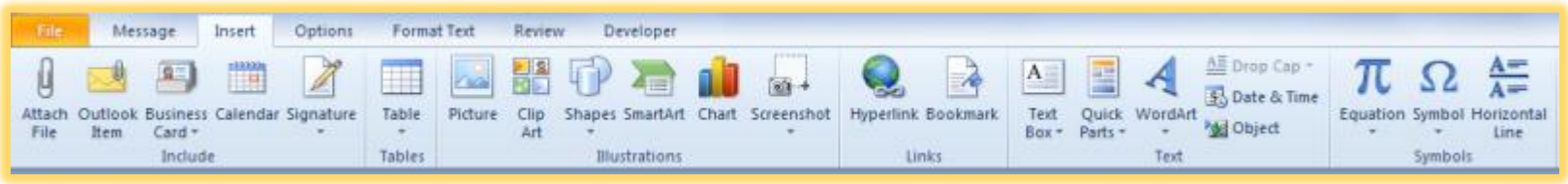
3. **Click in the body of your Email and your Insert Tab items activate. Click the Screenshot button and Outlook displays your Available Windows – notice the Excel Workbook is the first pane in the window.**
4. **Click Screen Clipping, Office leaves Outlook and opens the Excel Workbook for you which dims. Click the cross hair cursor and drag the information for ABC Company as displayed above. After you click and drag, release your mouse button and Office inserts the Screenshot into your email.**

Order	Date	Customer	Word	Excel	owerPoi	Access	Outlook	Total	Paid?
101	1/2/2012	A. B. C. Co	5	-	5	-	5	$750.00	Yes
109	1/4/2012	A. B. C. Co	-	7	5	-	5	$850.00	Yes
152	1/22/2012	A. B. C. Co	-	-	-	55	-	$2,750.00	Yes
176	1/8/2012	A. B. C. Co	5	-	5	-	5	$750.00	Yes
184	1/16/2012	A. B. C. Co	-	7	5	7	5	$1,200.00	Yes
119	1/7/2012	ABC Co	-	-	10	-	10	$1,000.00	Yes
134	1/14/2012	ABC Co	50	20	-	10	-	$4,000.00	Yes
145	1/20/2012	ABC Co	-	-	10	5	5	$1,000.00	Yes
149	1/21/2012	ABC Co	30	20	-	20	-	$3,500.00	Yes
102	1/2/2012	Adam, Allan	-	1	1	1	1	$200.00	Yes
177	1/9/2012	Adam, Allan	-	1	1	1	1	$200.00	Yes
126	1/9/2012	Bates Motel	48	30	39	2	-	$5,950.00	No

Clicking an item in your Available Windows inserts the entire screen for you to edit and crop. You should practice Screenshot editing by inserting a map or either item from the Internet into a Word document or Outlook email.

Outlook Insert Tab

While ***Outlook's Insert Tab*** contains some of the items similar to Word and Excel, Outlook has other commands that are very helpful in using Outlook. For example, the ***New Email Insert Tab*** contains ***Calendar***. Let's use some of the popular ***Insert Tab*** commands in Outlook; pictured below is the ***Insert Tab*** for a ***New Email Message***. The ***Insert Tab*** like the ***Format Tab*** will gray out commands that are not available, except when in the body of an email message or the ***Notes*** section of a ***Calendar***, ***Task***, or ***Contact***.



1. **Open a new mail message.**
2. **Click in the body of the message and type in text for a message.**
3. **Click the Attach File button and browse to where you store your files/folders for this manual and insert/attach the Budget Excel workbook.**
4. **Next, Click the Attach Item button and navigate to your Contact folder and select a contact to attach and email someone.**
5. **Insert your business card in the email, too.**
6. **Add a picture or Clip Art in the body of your email using the Picture button in the Illustrations Group.**
7. **Insert the date and time at the top of your email message.**
8. **Insert a horizontal line between your paragraphs of your email.**
9. **If you want to use a signature for your email you may choose your signatures from the list provided by the Signature button in the Include group.**
10. **Use some of the other buttons to add items to your email – we will work with tables and charts later.**

The Attach File Command is any object or file external to Outlook; the Outlook Item Attachment Command is ANY item, such as Appointment, Contact, Email, Task, etc. that is internal to Outlook. I use both of these a lot in Outlook.

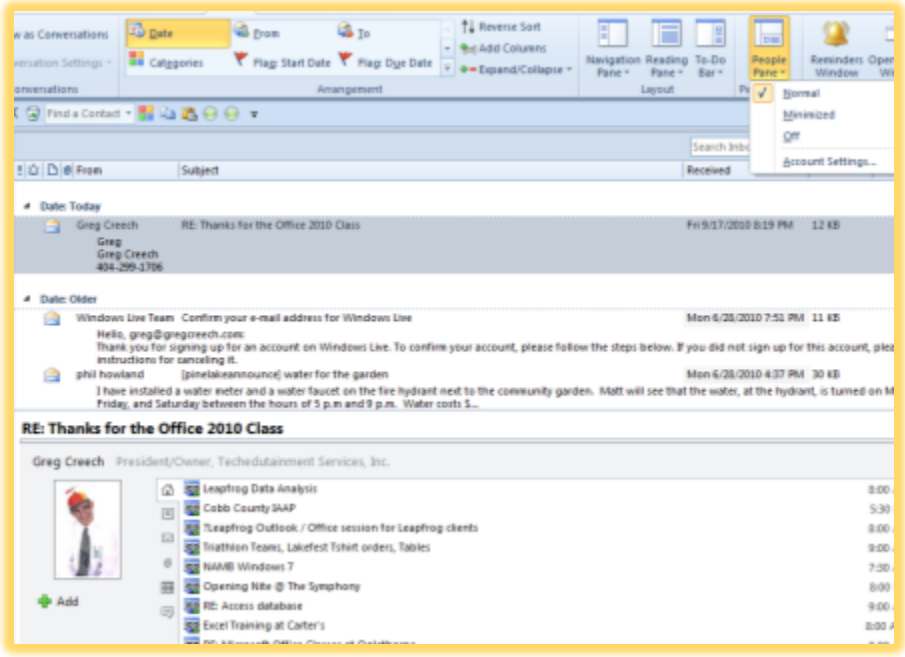
☹ Important Gotcha! Outlook will place your attachments in the body of your email if your email is formatted as Rich Text and Outlook will place your attachments at the top of your email in the Attachment box if you use Plain Text or HTML Text formats. The Options Tab in the New Message pane contains the Plain Text, Rich Text, and HTML formats in the Format Group. ☹

Lookout for Outlook's New Features

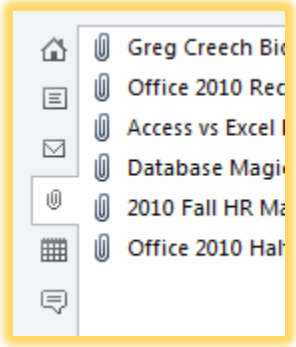
Outlook 2010 has many new features and uses the Ribbon and new interface across the application, unlike Outlook 2007. We will examine some of the neat new features and overview some of the important tabs in Outlook such as the ***View Tab, Send/Receive*** and ***Folder***.

Outlook's People Pane

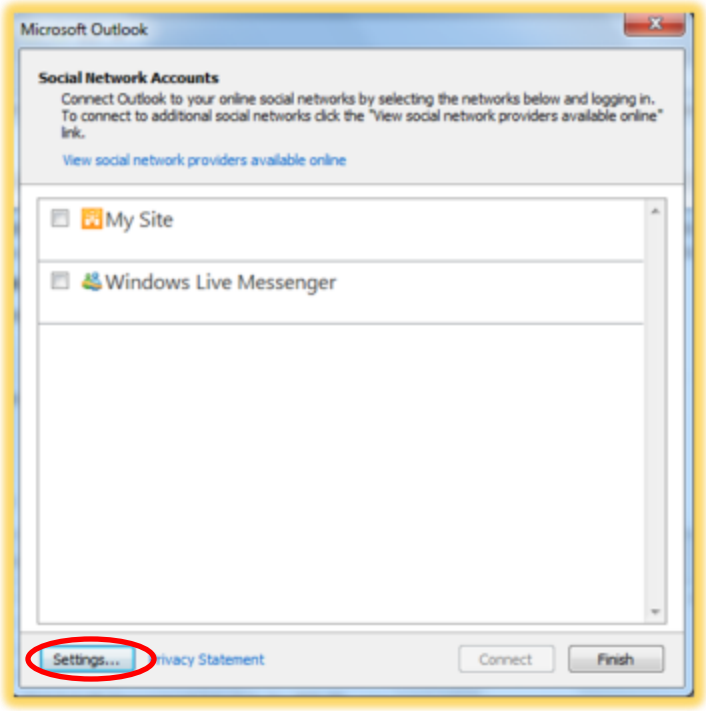
Outlook has finally moved into the new century. The ***People Pane*** is a popular pane for you to use to view ALL email messages, appointments, social network information, attachments, and so on for the for the person who you select. Here are the steps to activate your ***People Pane*** and set options.



1. **Go to your Inbox (or any email folder) and Click the View Tab.**
2. **Click the People Pane command button and from the cascading menu choose Normal.**
3. **With any message selected you will see all of the Emails, Appointments, Attachments, and other items from that person. I have an email from myself selected and Outlook displays all of my information associated with me. The Home button displays all of your items. I have clicked the Attachment button displayed at right and all of my attachments appear. You can view Calendar appointments, emails, RSS and News Feeds and so on using these buttons.**



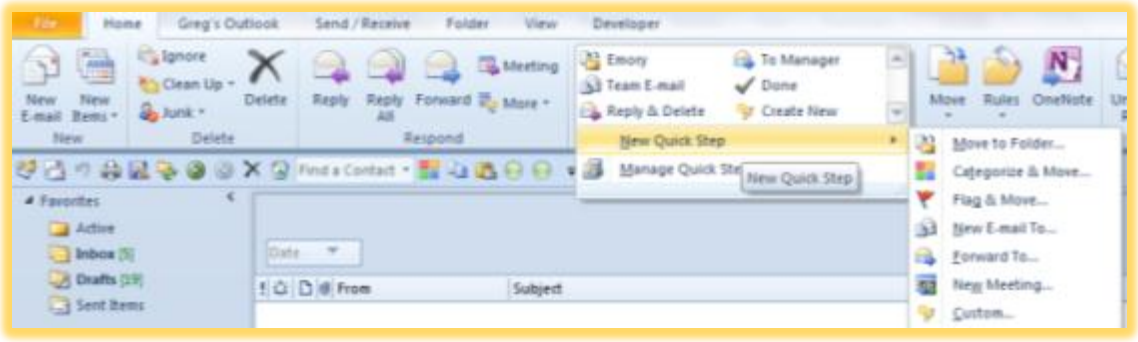
4. **The People Pane and Outlook allow you to add your Social Networks, such as Facebook and LinkedIn. After pressing the Settings button at the bottom of the Social Network Accounts Pane, Outlook prompts you for our login and password information. When you select an email or other item, Outlook displays the Social Network information rather than the Outlook information about the person. Also, this option may not be available for your organization to use Social Networks; however, most organizations allow you to use Outlooks' People Pane for view your emails, appointments, etc. with your Outlook. While I have the Social Networks active on my home computer, I prefer using the People Pane without Social Networks on my other computers. Using the People helps to get to specific emails, appointments, attachments and other items so much quicker and easier than before and puts the items in one nice neat pane.**



5. **Use the People Pane button you can turn it off and you can use the borders to resize the People Pane, too.**

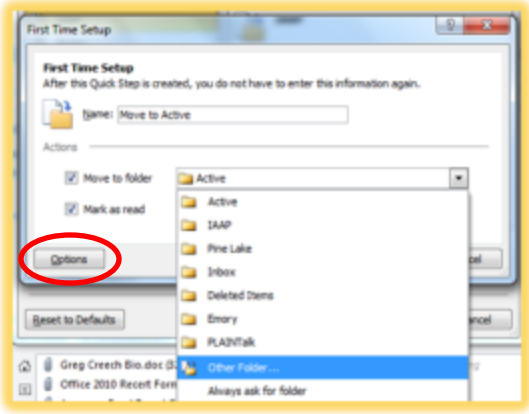
Outlook Quick Steps

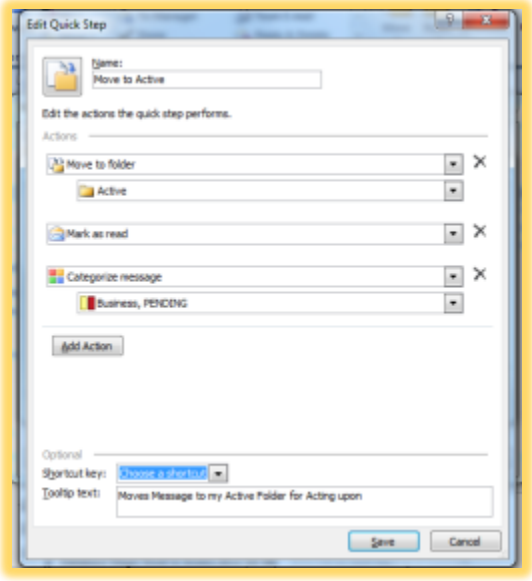
Outlook 2010's new ***Quick Steps*** feature is really cool and easy to set-up. This is an user-friendly way of creating shortcuts known as ***macros***. ***Quick steps*** allows you to set the actions you take to perform a task, such as moving an email message to a specific folder or assigning items to a category.



The task completes with one click rather than several selections and clicks. You should create many quick steps to help you perform your repetitive tasks with one click rather than several. You will notice many actions and items that you may perform ***Quick Steps***; I'm concentrating on using ***Quick Steps*** with my email.

Here's how to set-up a Quick Step for moving a message and assigning a category to the message.





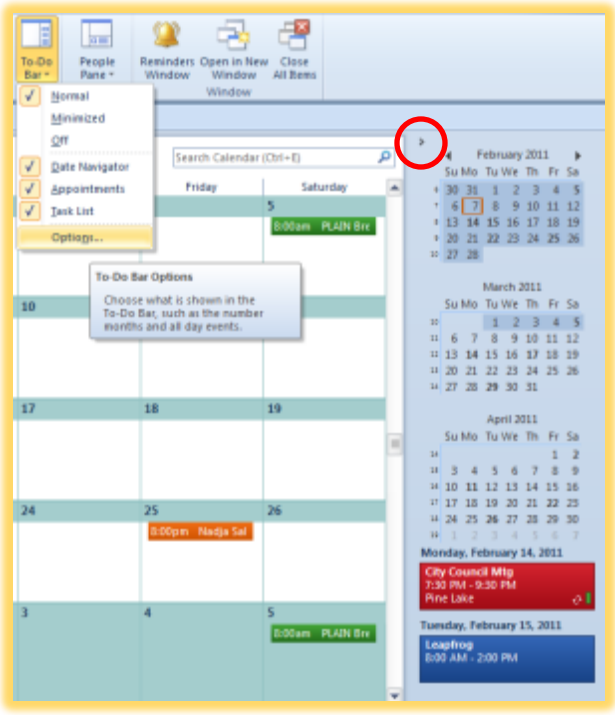
1. **In the Home Tab of your Email object, Click the Dialogue Box launcher arrow or the See More arrow and from the menu choose New Quick Step and then Click Move to Folder.**
2. **At the First Time Setup Box click the Options button at the bottom of the pane.**
3. **The Edit Quick Step pane appears. Name your Quick Step – I am moving a selected message(s) to my Active folder.**
4. **Next you may change your action or keep the Move to folder action, which I am keeping this action.**
5. **Next, click in the box under the action to choose your folder you may need to navigate or browse to find the folder you**

wish if it is not in the list by choosing the other folder item in your list.

6. **Select the folder you wish to move the message to and Click OK.**
7. **I am keeping the Mark as Read item then I am creating another action to assign the message to categories. You may add other Actions, too.**
8. **You may use a shortcut key to perform the action, too, by assign the Quick Step to one of the shortcut keys in the list.**
9. **I am provided a Tooltip text describing my Quick Step action as well.**
10. **Click Save.**
11. **Your Quick Step appears in your Quick Step pane ready for you to use and save time and steps.**

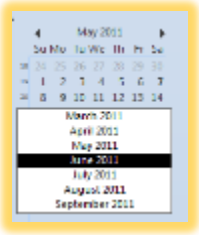
The To-Do Bar

A feature introduced in Outlook 2007 and worth reviewing here is the ***To-Do Bar***. In Outlook 2007 had a new ***To-Do Bar*** for you to display your calendar, upcoming appointments, and Tasks. You can activate the ***To-Do Bar*** through the ***View Tab*** and clicking the ***To-Do Bar Command button***. As displayed at right you may choose your items for viewing and the ***Options***. . . item allows you to set the number of months, appointments, and tasks to view.



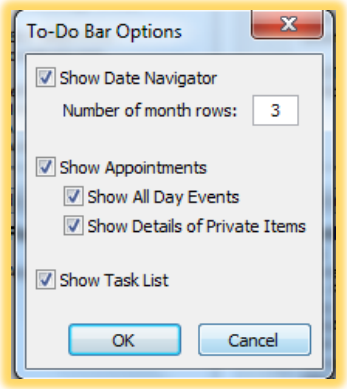
Hot Tips! Here are some Hot Tips N Tricks in using the To- Do Bar:

- ✓ **You can double click the items on your To-Do bar's calendar, appointments, or tasks to open those items.**
- ✓ **You may minimize the To-Do Bar using the Minimize arrow (>) which is circled at right for you.**



- ✓ **You can click on the Month header on your calendar and a series of previous and future months appear for you to quickly navigate to as displayed at right.**

- ✓ **You may click an email message and drag it to a specific date on your To-Do bar's calendar and Outlook creates an Appointment with the email text in the notes section and at the correct date.**



My ***To-Do Bar Options*** pane displays at right with my ***To-Do Bar***.

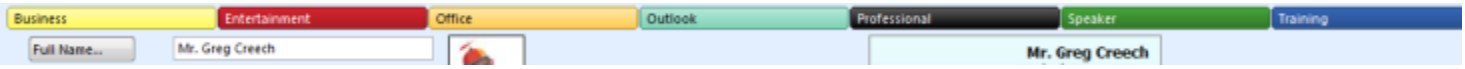
☹ An Important Gotcha! You must activate the To-Do Bar in each of your objects. Unlike the Navigation Pane which automatically appears in all of your views; not so with the activating the To-Do Bar. I used the View Menu item in Contacts and Calendar to activate my To-Do Bar in those objects. ☹

Color Categories!

Using ***Color Categories*** is an excellent tool for organization; this is another feature introduced in Office 2007 that you should use in Office 2010. You should assign your contacts, calendar appointments and meetings, and e-mail messages to color categories. ***Categories*** allow you to assign a person to more than one type of group or item. I use ***Categories*** to organize my contacts by type of business, type of service, type of account (good, bad, or prospect) and many other ways to help find and use contacts and other Outlook Items as a category group.

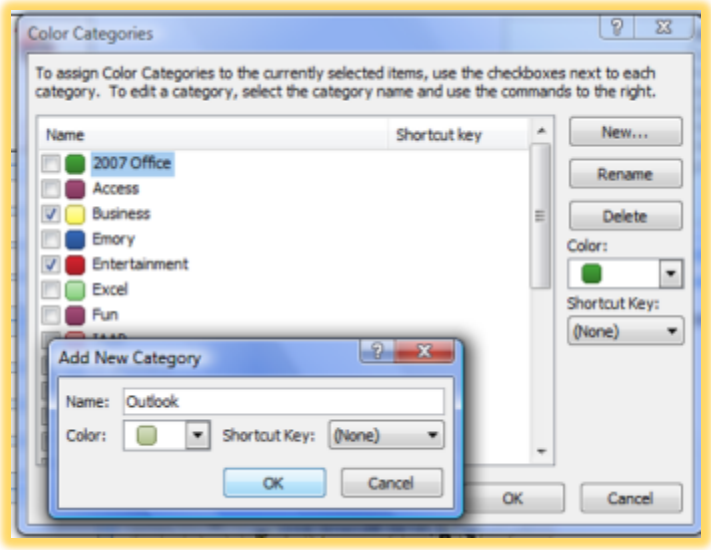
1. **Open a Contact and in the Contact Tab, click the Categories button in the Tags Group. A picture of the Categories cascading menu appears at right. I have added many of my own categories, as you can see. You should and may assign a contact to multiple categories for tracking and grouping.**

2. **To assign a Category simply click one or more of your color items. Assign yourself to several Categories. Your category name and color appear at the top of your contact. I assign my contacts to many categories so I may use the contact in various categories for Mail merge with Word, to send an email based on a Category, and other important areas. Here are my colorful categories.**



Please get into the habit of using this important efficiency tool. You can create, edit, and delete category choices by clicking the ***All Categories button. Let's create your own Category.***

1. **Click the All Categories. . . button and the menu at right appears – Color Categories.**
2. **Click the New button and Add a New Category as I am accomplishing for Outlook. Type your New Category Name, choose a color and assign a Shortcut key if you like.**
3. **Click OK for Outlook to accept and use your new category.**



4. **You can select a Category and Delete it or you may Rename a Category using the Rename button. You may change your color and shortcut key from your Color Categories Pane, too. Create many categories and assign your contacts as you create them to a category or two or three. . .**

5. **Click OK to exit the Color Categories Pane. Click the Save and Close Button for your Contact or Calendar item you are using Categories.**

I customize my category list often in order to organize my contacts, appointments, and other items by a specific customer, type of account, business partner, or family member. You may always right click on an item, such as Calendar Appointment, Contact, Task, or as pictured at right an email message and assign a Category from the Shortcut Menu.

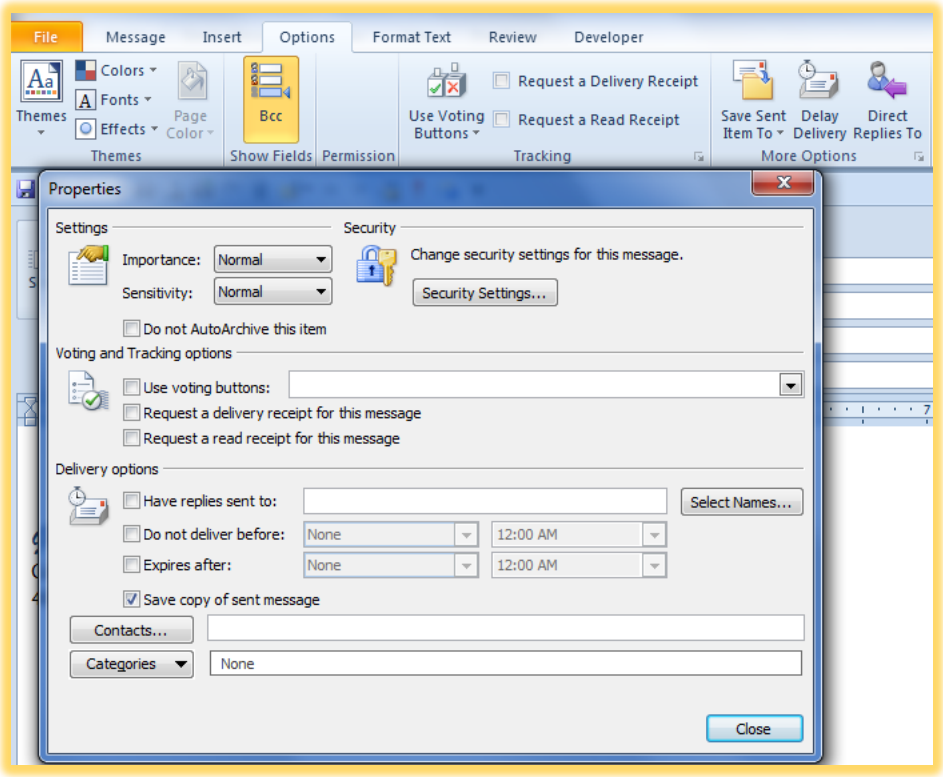
♫ If you import contacts or upgrade Outlook, not all of your categories may be in the list. You will see the words – Not In Master Category List in your Color Categories Pane. You will want to add or delete these categories. ♫

When you initially begin using Outlook, you will have categories, such as Red Category, Blue Category and so on. When you start assigning Categories you can give the color category a name. You can reuse colors for other categories.

Across Outlook 2010 there are tabs that are common, such as ***Home***, ***View***, and ***Folder***; however, these tabs take on different ***Command buttons*** and features depending upon the object you are using. I will overview some of these important tabs for ***Email***, Cal***e***ndar, and ***Contacts***.

Message Options Tab

An important tab in your E-mail message screen is the new ***Message Options Tab***. The ***Options tab*** and ***the Message Properties dialogue box*** that you receive when you click the ***More Options Dialogue box arrow*** allow you to set your ***Importance***, use ***voting buttons***, ***request delivery and read receipts*** for your message, and other delivery options. You may associate contacts that are not receiving this e-mail to your e-mail message and set your ***categories***, too. ***Mail Format*** and ***Outlook Options dialogue boxes*** from the ***File Tab*** for your mail messages affected ***ALL*** of your messages, using the ***Options Tab and Pane*** allows you to set your options for a specific message.



1. **In your Mail Message, Click the Options Icon,**
2. **Set a different theme for colors and fonts if you wish in the Themes group.**
3. **If you wish to use or view the Bcc click that button – I am using the Show Bcc feature.**
4. **Outlook allows you to use Voting buttons and other types of response for your emails, too.**
5. **Set other items that you may wish for e-mail, such as Delivery and Read Receipts, in the Tracking group.**
6. **When you use the More Options Group buttons, Outlook activates the Message Properties dialogue box for you to set your Delivery options for replies, delivery date and time, as well as expiration date**

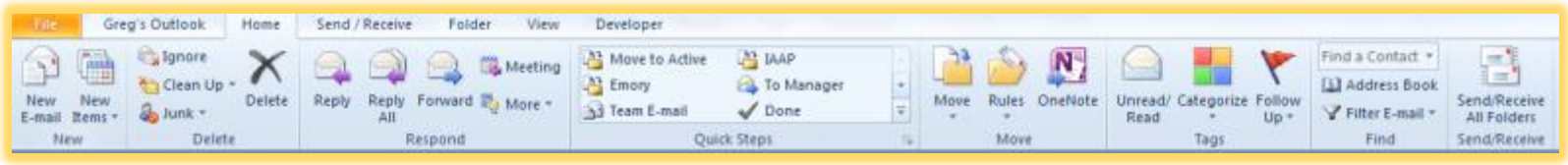
and time. These options allow to set when a message is delivered or if the message expires Outlook can delete it for you or archive the message

7. **The bottom of the pane allows you to set your categories as we accomplished with contacts and to associate the email with a contact that is not receiving the email.**
8. **After selecting your options, click Close in the message options pane.**

Home Tab

Like the Home Tab in Word, Excel, and PowerPoint, Outlook's object Home Tab provides common commands that allow you to create new items, view your items, and other features I will overview here. We will look at ***Email***, ***Calendar***, and ***Contacts' Home Tabs***. Using your own Outlook folders and objects let's review these important items in Outlook.

At Home with Email

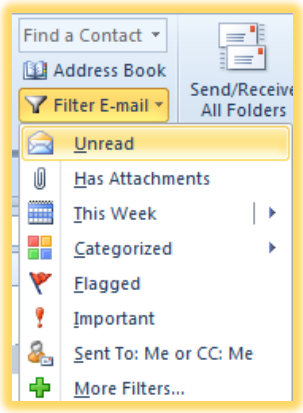


Here are some of the important items that you should use for the Email's Home Tab. So, open your Outlook at the Email object on the Navigation Pane.

New Group – The New Group across the Outlook Application allows you to create new Emails, Appointment, Contacts, To-Dos, etc. within the Object, such as New Email. The ***New Items*** allows you to create items that are not part of this object, such as creating a New Appointment in the Email object. I use this so much that I have placed this on my ***Quick Access Toolbar*** and My Custom Outlook Tab so I am never far away from creating anything new in Outlook.

Delete and Respond – These two groups replace common icons in previous versions of Outlook. You can delete at will and use the good old Reply, Reply All, and Forward from this Group. The More button in the group permits you to forward your message in a variety of ways – as an attachment or text message.

Tags Group – We have looked Categories previously; you may quickly mark an email as either read or unread by clicking the ***Read/Unread*** button and assign a follow-up using the Follow-up Flag.



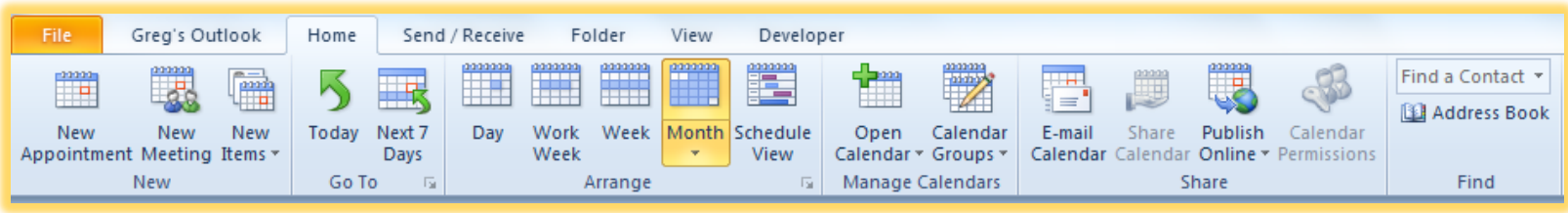
Find and Send/Receive – The last two Groups on the Home Tab are ones that I use early and often, particularly when I have many emails jamming my Inbox. The ***Filter Email*** is a nice addition to Office 2010 and allows you to quickly review specific emails such as ***Unread***, with a ***Follow-up Flag***, or ***Important***. The ***More Filters*** option allows you to search on ***Keywords*** in an Email message and even highlights the search for you! This is very useful with

hundreds (or even thousands) of email to wade through.

The ***Send/Receive*** forces a send/receive with a click or you may press the ***F9*** key in lieu of click this button. While you may set your ***Send/Receive*** settings in the Outlook options, at times, you will want to "force" a ***Send/Receive*** and this button does the trick.

At Home with Calendar

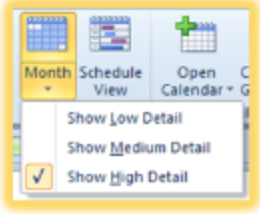
I have used Outlook's calendar for over 15 years and can recall meetings I held in June 1998. With each version of Outlook, the Calendar improves. ***So open your Calendar and let's look as we review the Home Tab for your Calendar.***



New and Go To – Like Email you may quickly set-up a ***New appointment*** or ***Meetings*** as well as other Outlook item in the ***New Group***. The ***Go To*** group offers a quick way to navigate back to your current date using the ***Today*** button or to view your ***Next 7 days*** in the weekly view**.** ***I am glad that Outlook includes the Next 7 days Go To View; I have many clients request a weekly view when the week doesn't begin on a Sunday or Monday and now we have this ability in 2010.***

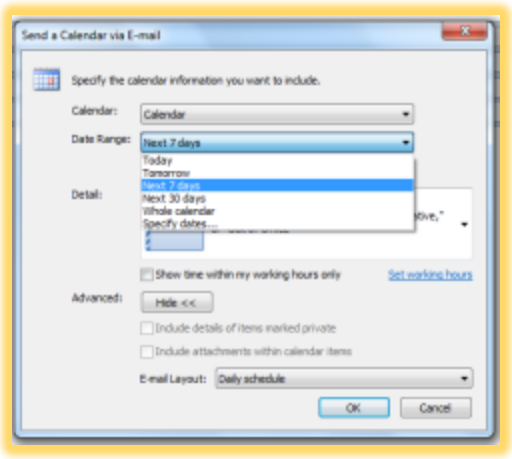
When you are looking another date, navigating back to the current date is easy simply by clicking the ***Today*** button. If you click ***the Dialogue box launcher*** or Press the ***CTRL + G*** keys Outlook activates the ***Go To Date Pane*** for you to enter or select a date to navigate. I have entered my birthdate (yes, Outlook goes back that far!) and clicked ok. After I notice the day I was born, I clicked the ***Today*** button to travel ahead quickly 50+ years to the current date.

Arrange – There are many views to explore in Outlook's Calendar and the ***Arrange Group*** offers quick and easy ways to view your Calendar. You should click each one of these items to view your calendar by day, week, and month. As pictured at right, the Month view allows you to select the level of detail to view in your ***Monthly View***. Also, the ***Schedule View*** is new for Office 2010



and is particularly useful for looking at multiple calendars and the free/busy times in one view for various calendars. We will look at this more in the ***View Tab***.

Manage and Share Calendars – These Groups allow you to ***Manage*** other people's calendar if they give you permission and you are using an ***Exchange Server*** for Outlook. You may open another Calendar (.pst) file from here, too. You can publish your Calendar to the web and you can email your Calendar. ***Here's how to Email a part of your Calendar.***



1. **Click the Email Calendar button, Outlook opens your email ready to attach and put your calendar in the body of the email and Outlook opens the Send a Calendar via E-mail pane. Select your date range or specify a custom range, decide the level detail you wish your recipient to vies and the working hours or entire day/night. The Advance options allow you to show private appointments and to include attachments. The E-mail Layout offers a Daily Schedule or to List your Events.**
2. **Click OK, after confirming your date range, click Continue and Outlook inserts your calendar dates as an attachment and in the body of your E-mail.**

At Home with Contacts

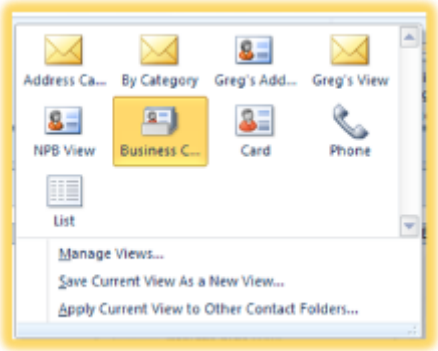
The ***Contact Home Tab*** provides ways of managing your ***Contacts***, creating new contacts, viewing your contacts, and using Outlook's ***Communication tools*** with your

contacts.

Like with the other items in Outlook the ***Contact Home Tab*** includes the ability to Share your ***Contacts*** and use ***Tags***, such as ***Categorize***.

New – The ***New Group*** allows you to create an individual contact or you may create a group of ***Contacts*** (AKA ***Personal Distribution List***), and to create other new Outlook Items, such as email, appointment, task, etc.

Communicate – The ***Communicate group*** permits you to select a contact (or contacts) and create an e-mail, meeting, task, or other items from this Group based on your select contact(s).



Current View – As with other Outlook objects views are important and easy in Outlook 2010. When you click the ***See More arrow*** your gallery expands for you to selected different views – my favorites are ***Address Cards, Business Cards, By Category, Phone,*** and views that I customize and save such as NPB and Greg's View. You should open your Contacts and preview each View.

Actions and Share – The ***Actions Group*** allows you to quickly ***Move*** a contact to another folder and to active the ***Mail Merge Wizard*** to work with Word. The ***Share Groups*** offers a quick way to email your contact to another person through the ***Forward Contact*** command button and cascading menu.

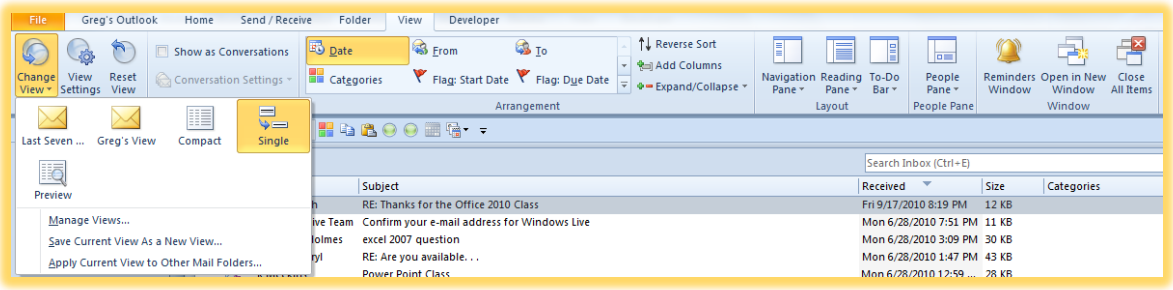
Note: As I wrote earlier time and space do not permit me to detail these items, I offer a training course and manual entitled "Lookout, It's Outlook 20110" that details these items and provides step-by-step instruction on how to use these features such as changing your views, customizing and saving views, and using the Mail Merge Wizard.

View Tab

Due to Outlook's various object types the View Tab is important to see your information in a variety of ways and organization. We will overview E-mail, Calendar, and Contacts and some of the important Views and functions.

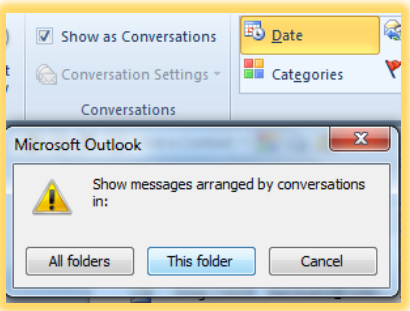
You should have an Email Folder open, such as Inbox, Sent Items, etc. and try each of these items below.

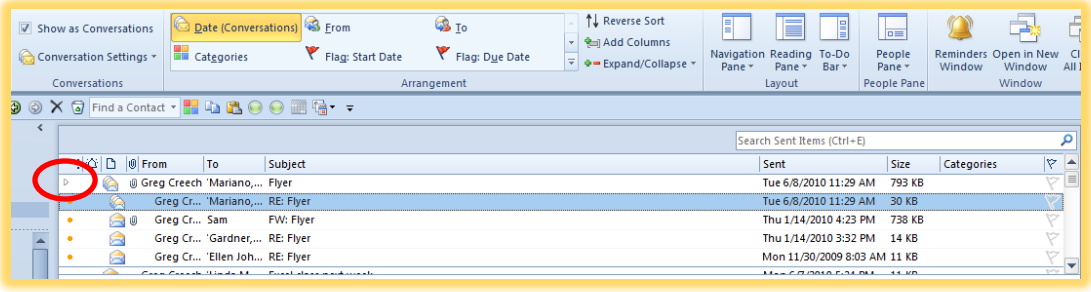
E-Mail Views



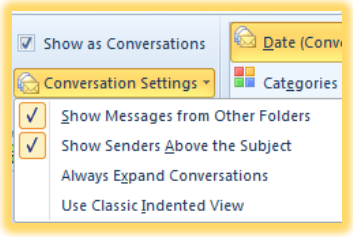
Current View - The First Group, ***Current View***, on the ***E-Mail*** views allows you to change your ***Current view*** using the ***Change View*** and ***View Settings*** button. You can add fields, filters, and sorts to your current view and create your own view as I have with Greg's View. However, the default view is usually fine for most people and you can quickly sort and filter your view using the ***Arrangement Group*** or Click column headers, such as Subject, Size or Categories to quickly and easily change your sort.

Conversation – The ***Conversations View*** for E-mail organizes your email message by subject and the most current email is first and the previous emails list underneath the most current email. This view is helpful for consolidating and organizing an length email exchange of replying and receiving emails about a common subject from several people. When you click the ***Show as Conversations*** box to check it, Outlook asks you which to folder to apply the view all folders or this folder. I usually only want the current and active folder I'm working in for this view. I



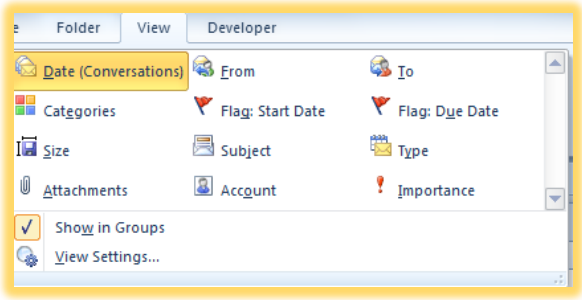


have displayed here my ***Conversations view*** of a Subject of Flyer. This assembled all emails with the subject Flyer for me. The arrow circled above allows you to expand and to collapse your view so you may see the detail messages or not. The ***Conversation View Settings*** allow you to display messages from other folders that use the same ***Subject***. You may ***Expand the Conversations*** automatically, too; I usually like to use the arrow as described above to expand my conversation for a particular subject and email.

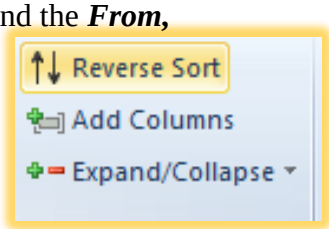


Click ***the Show as Conversations*** again to uncheck it to turn off this view when you are finished.

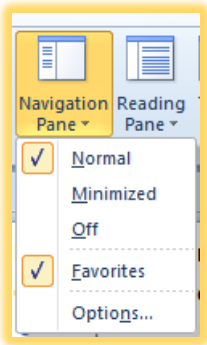
Arrangement – The ***Arrangement Group*** is an important Group for Email. This pane allows you to click and select various sorts and views. By default your emails are sorted and organized by date from the most recent. However, you will want to see your emails sorted and organized differently at times and this pane at right helps you accomplish sorting and viewing quickly and easily. With your email Inbox or other folder open you should try these different views and sorts to understand what each will accomplish. I find the ***From, Size, Account*** (since I have four different email accounts that feed into Outlook), and ***Attachments***.



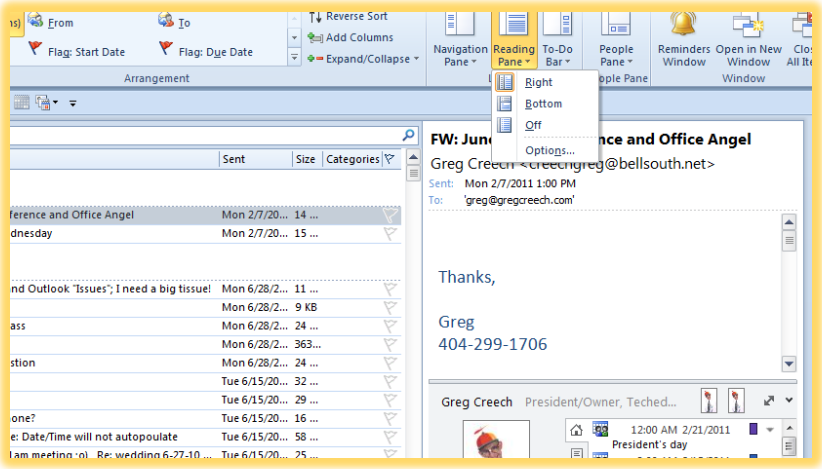
The ***Reverse Sort***, ***Add Columns*** and ***Expand/Collapse*** changes your views, too. I have added columns such as ***From***, ***Categories***, and others. You can quickly ***Expand and Collapse*** your groups; however, you may find using the small arrows next to your Groups just as easy to expand/collapse your information. The ***Reverse Sort*** is a button that I rarely use, because I sort by clicking the column header. ***Clicking a column header such as Received, To, From, or Subject changes the Sort for you in Ascending Order and clicking the Column Header again changes to sort to descending.***



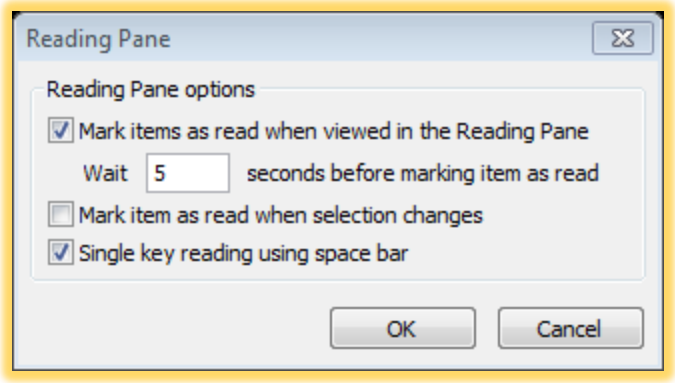
Navigation Pane – The ***Navigation Pane*** is integral in moving around in Outlook and activating your objects. I always have my ***Favorites*** active, since I have so many folders, I like using the ***Favorites*** by having my often used ***Folders*** at the top of the ***Navigation Pane***. I use the ***Minimize arrow*** on the ***Navigation pane*** to Minimize my ***Navigation Pane*** I do not use the cascading menu at right. For ***Options*** I have all of my Outlook objects in my Pane, such as ***Journal, Notes, and Shortcuts***. I never turn off my ***Navigation Pane***.



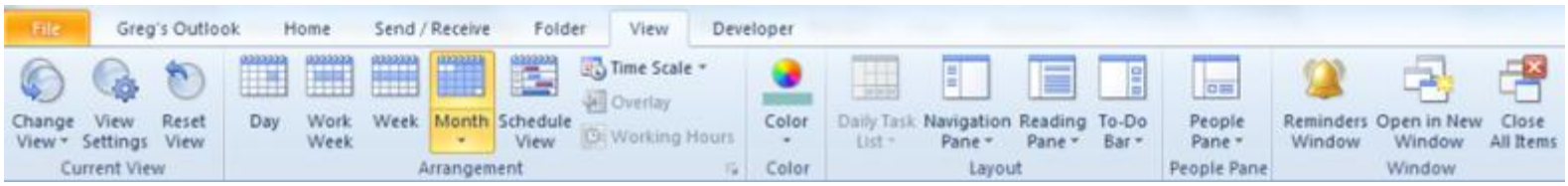
Reading Pane – As old timer of Outlook I prefer my ***Reading Pane*** at the bottom of the screen and this increases my ability to perform sorting and other functions easier than having the pane at the right. I am displaying my ***Reading Pane*** at right and have increased the width of my inbox so the column headers appear for me to sort. My ***People pane*** is beneath the ***Reading Pane.***



The ***Options*** for the ***Reading Pane*** are important for you to set. For example, I have unchecked the ***Mark item as read when selection changes***, because I will accidentally move from one message to another and not realize that I have moved and the message becomes unread. Therefore, I have changed my options to ***Mark items as read when viewed in the Reading Pane for 5 seconds*** – this provides enough time for me to realize I have the message selected and to preview the message. I like the ***Single key reading using space bar*** because this scrolls through your message when you press the space bar and when you reach the end of the current message Outlook navigates to the next message as you press your space bar and continue to scroll through your text and other messages.



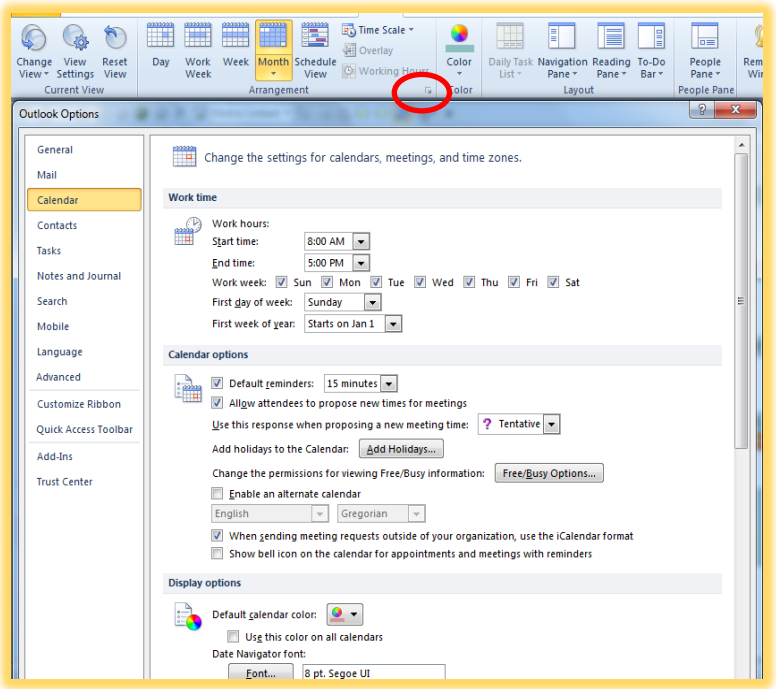
Calendar Views



Current View - Like E-mail, you may change your View in the ***Current View Group*** and like E-mail, you have the ***Navigation Pane, Reading Pane, To-Do Bar, and People Pane*** features here with similar options, so I will not review these items. You can decide for each Outlook object if you want these panes visible or not. We have previewed the ***Arrangement Group*** in the Home Tab, but we will concentrate on the New Feature of ***Grouping your Calendars*** and using the New ***Schedule View***.

The ***Change Views*** pane and gallery displays at right for you. Generally, I like my Calendar in a Calendar View such as ***Day***, ***Month***, or ***Week*** but there are times I like viewing my Calendar a table format such as ***By Category*** or ***List***. This pane makes it easy to change your view from a Calendar view to a table view. You should look at ***List*** and if you use Categories by ***Category*** views. When you change your View to a table view, your ***Arrangement Group*** changes with similarities of E-mail to add columns, reverse sort, and so on.

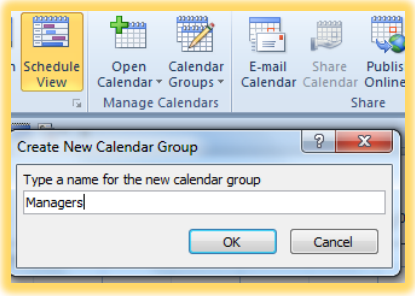
With your Calendar open change your Views and then look at your Calendar in all of the Arrangement Views such as Day, Week, and Month.

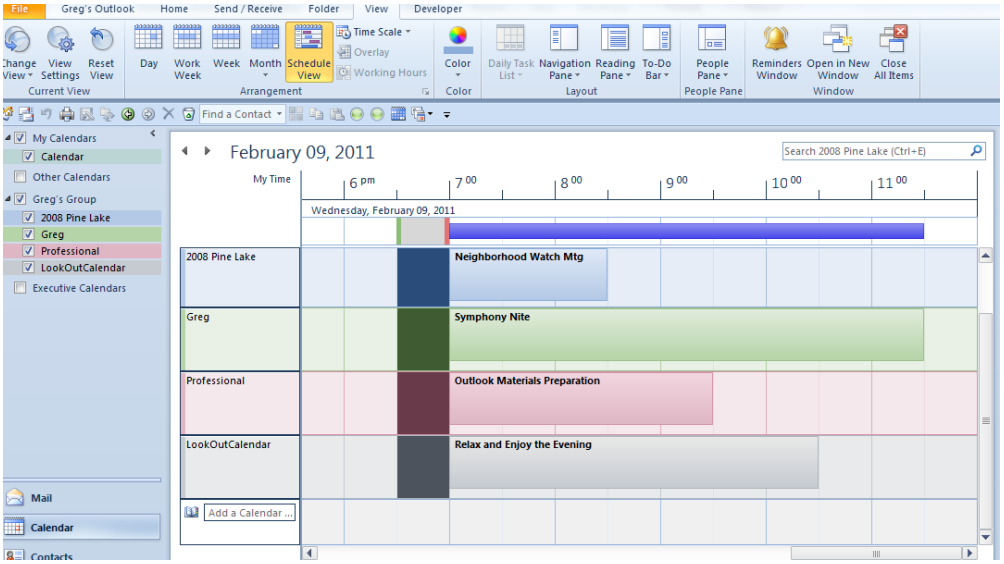


Arrangement - When you click the ***Arrangement Dialogue Box launcher***, Outlook opens your ***Calendar Options*** for you to set important items, such as your workweek and time, using more than one time zone, Adding Holidays, and setting your default color. You should review these options to decide which work best for you and your calendar.

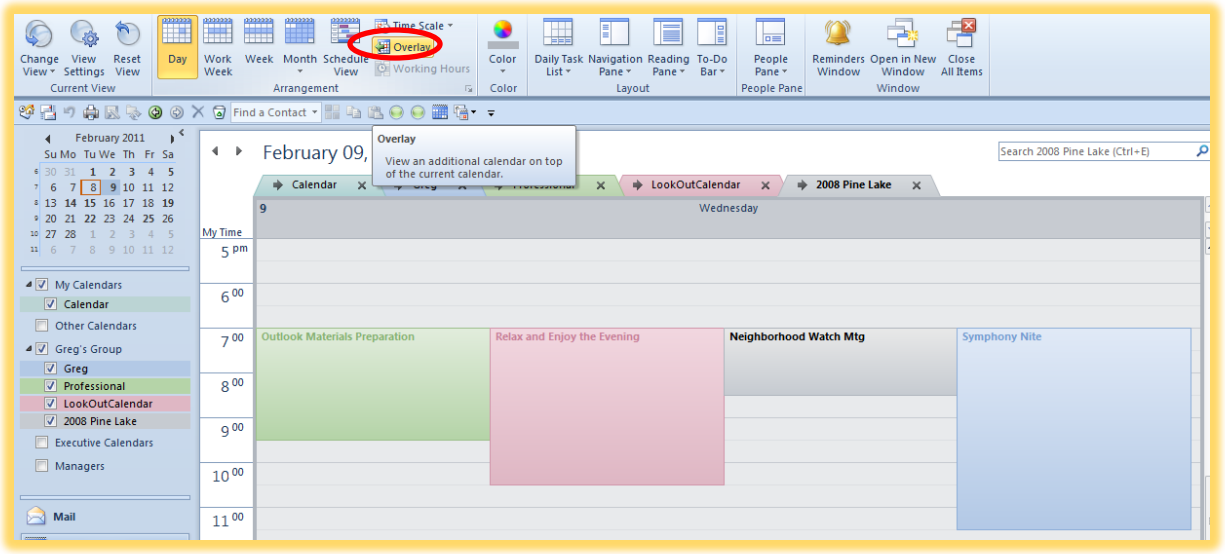
Outlook Schedule View and Calendar Grouping

You can create a grouping of calendars for other people, resources, etc. and click a check box to display your individual and group calendars. Outlook expands the view for Meetings into the ***Schedule view***, so that now you can view multiple calendars in a more comprehensive and helpful view by dates and timeframes (you may change the timeframe in increments such as hourly, 30 minutes). You may create a ***Group*** using the Home Tab, as displayed at right. I am naming a Calendar Group Managers; after clicking OK Outlook takes me to the contacts I want to use for the Calendar. The Exchange Server, Delegates, and Permission may or may not allow this feature for you. I created several calendars and use the Grouping feature for those calendars. You can change a Calendar from one group to another by clicking and dragging. As displayed below, you can see how nice using ***Schedule view*** is for these Calendars showing me the events for different Calendars at 7:00 PM on February 09, 2011. Also, notice the different coloring of the calendars for organization and ease of viewing. The ***Navigation Pane*** makes it easy to check a calendar on to display or uncheck to hide the calendar or Group. This is a nice and neat new feature of Outlook 2010.



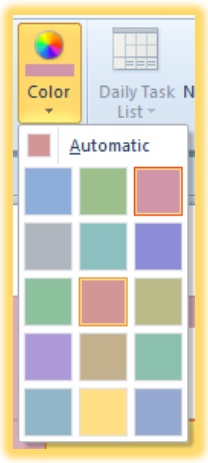


If you do not use the ***Schedule View***, but prefer the Day, Week, or Month views, Outlook uses the ***Overlay Mode*** as displayed here fore you. With Multiple Calendars selected or using a ***Group***, you may use the view displayed below. Notice the arrows at the Tab for

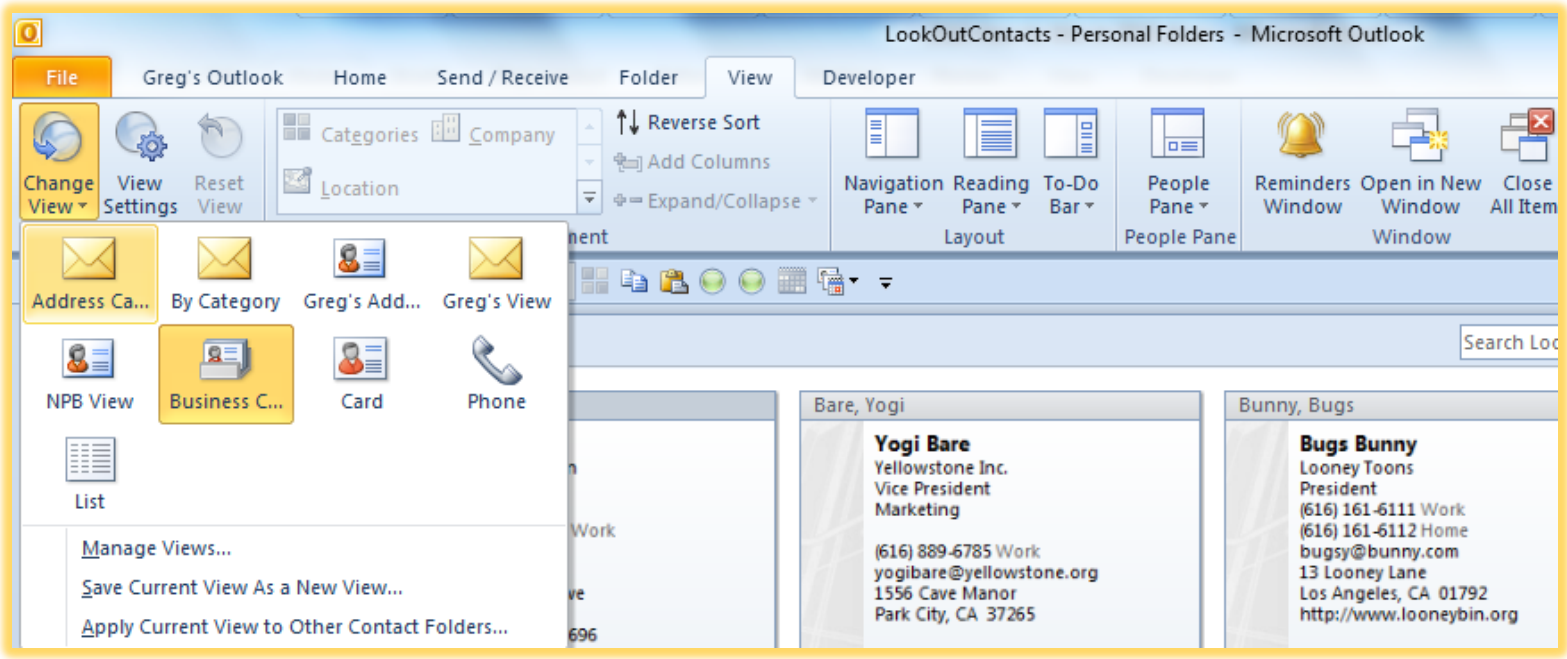


the Calendar you can click the arrow to remove this from the ***Overlay*** mode. You cannot use the ***Overlay*** Mode with ***Schedule View***. I like using both depending upon my needs of viewing multiple calendars as if they were one.

Color – You may color your Calendar quickly and easily using the ***Calendar Color*** Button displayed here.



Contact Views

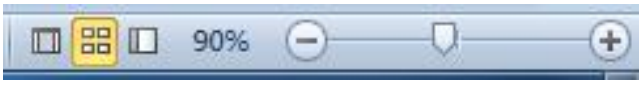


Your ***Contact Views*** offer many ways of reviewing your contacts. I have displayed my information in ***Business Cards***. Using the ***Current View Group***, you may look at your information as ***Address Cards***, create your own view, or look at your information in a table format using the ***Phone*** and ***List*** views.

Arrangement – The ***Arrangement Group*** for Contacts will not activate until you view your information in a ***Table*** view, such as ***By Category, Phone, or List***. From here you can sort by several ways and view your information differently and Add Columns, etc. With your ***Contacts*** in a view, look at these different views, especially ***List*** and ***Phone*** View.

View Shortcuts

Outlook provides simple ***View Shortcuts*** to turn on and off the ***To-Do Bar, Navigation Pane*** and other views. The ***View Shortcuts*** appear on the ***Status Bar*** next to the ***Zoom Slider*** at the bottom right of your screen and the ***Calendar and Contact View Shortcuts*** are pictured below. Click these in your various views to see the effects of ***Normal***, ***Classic, Address Cards Only***, and the other views available at a click. The ***Calendar Shortcuts*** appears at left and ***Contact Shortcuts*** at right with the ***Zoom Slider***.

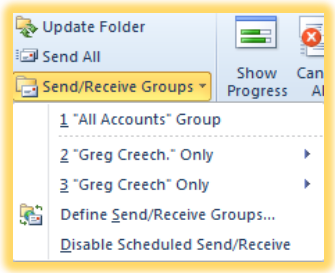


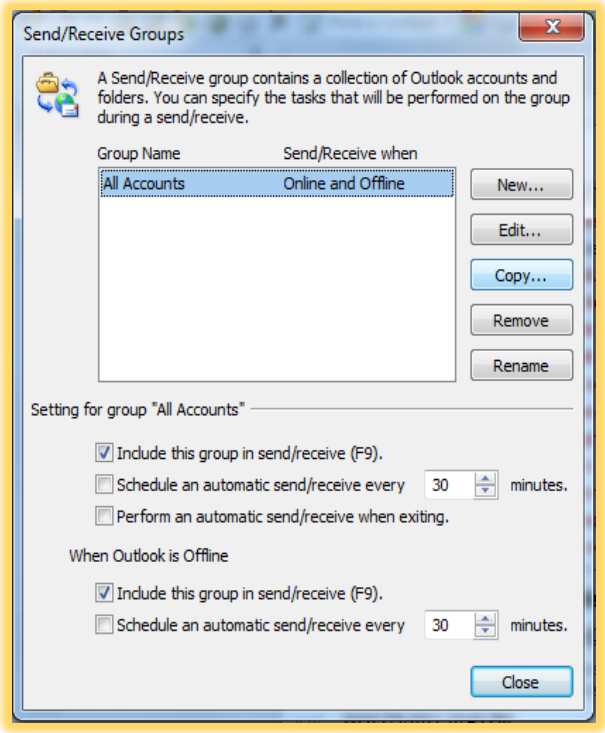
Send/Receive and Folder Tabs

There are two new Tabs in Outlook 2010 worth reviewing here. I am using the ***Email*** object to review these tabs as ***Email*** is where I tend to use the tabs the most; however, the ***Send/Receive*** and ***Folder Tabs*** are available in all Outlook's objects.

Send/Receive

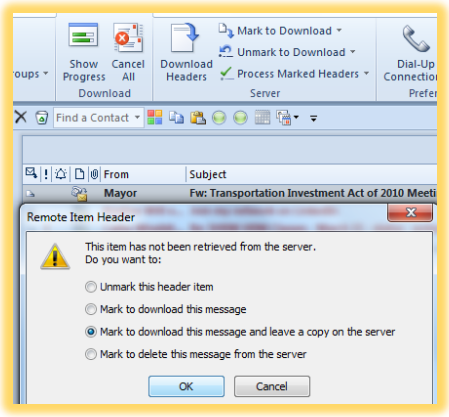
Send & Receive Group allows you to "force" a ***Send/Receive*** in Outlook; I use the ***F9*** on my keyboard, too. Pressing the ***F9*** key accomplishes a ***Send/Receive*** without using the ***Tab*** or ***Ribbon***. Using the ***Send/Receive Groups*** menu you may select the Accounts to Send and Receive and schedule your Send and Receive. When you click the ***Define Send/Receive Groups*** item the menu below appears for you to determine you want Outlook to process your Send and Receive. From the ***Send/Receive Groups*** you should set your Send/Receive Schedule to automatically send/receive every 10, 20, 30 minutes – whatever you like. After making your selection, C***l***ose the ***Dialogue box*** and Outlook will perform your send/receive as you have scheduled. ***Again, you may always press the F9 key for a Send/Receive.***



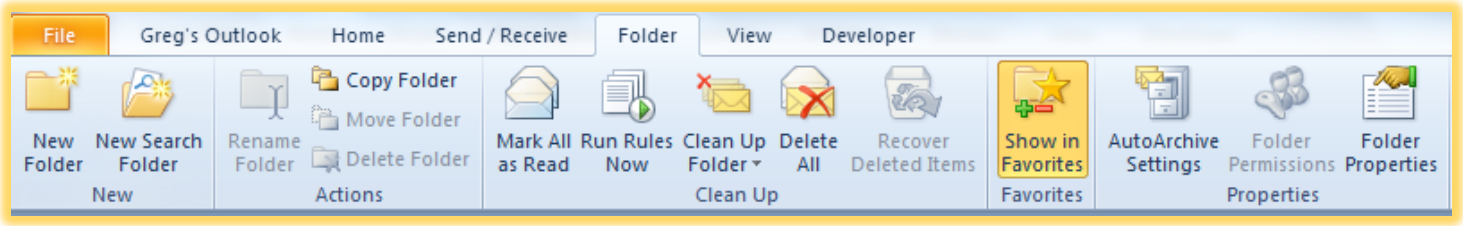


Download – The ***Download Groups*** allows you to monitor your progress as you download your information and emails or to ***Cancel*** your Send/Receive.

Server – This groups as displayed at right permits you to only download the ***Headers' information*** in an email from the server; the entire message does not download until you mark it to download and the process a ***Send/Receive***. This is helpful to preview email heading information without download the email into Outlook. You may want to use this when you receive much spam or unwanted emails. If you use this feature, the ***Reading Pane cannot display the message since the message resides on the server*** and not Outlook. This allows you to keep a copy of the message on the server and download the information into Outlook as displayed at right.



Folders



Folders and managing large amounts of data, particularly Email, have been popular in Outlook and with the ***Folder tab*** Outlook 2010 makes managing and creating Folder easier.

New and Actions – The ***New and Actions Group*** creates new folders and manages current folders for you. You should create lots of folders in Outlook to store your messages, contacts, and even create different calendars. Once you create a new folder, the ***Actions group*** permits you to copy, move, rename, and delete the selected folder. Note: Since I have my ***Inbox*** selected Outlook will not permit me to ***Move***, ***Delete***, or ***Rename*** this important folder; however, I can rename, copy, delete and perform other actions on Folders that I create for clients, as a reference, and so on.

Clean Up, Favorites, and Properties – The theses groups allow you to manage your folders and create action items, such as rules. I like showing my often used ***Folders in Favorites*** which is a section of the ***Navigation Pane*** at the top for you to quickly maneuver to your popular and regularly used folders. You can set your ***AutoArchive*** options here and click the Folder Properties for view the folder size, description, and your ***AutoArchive*** information.

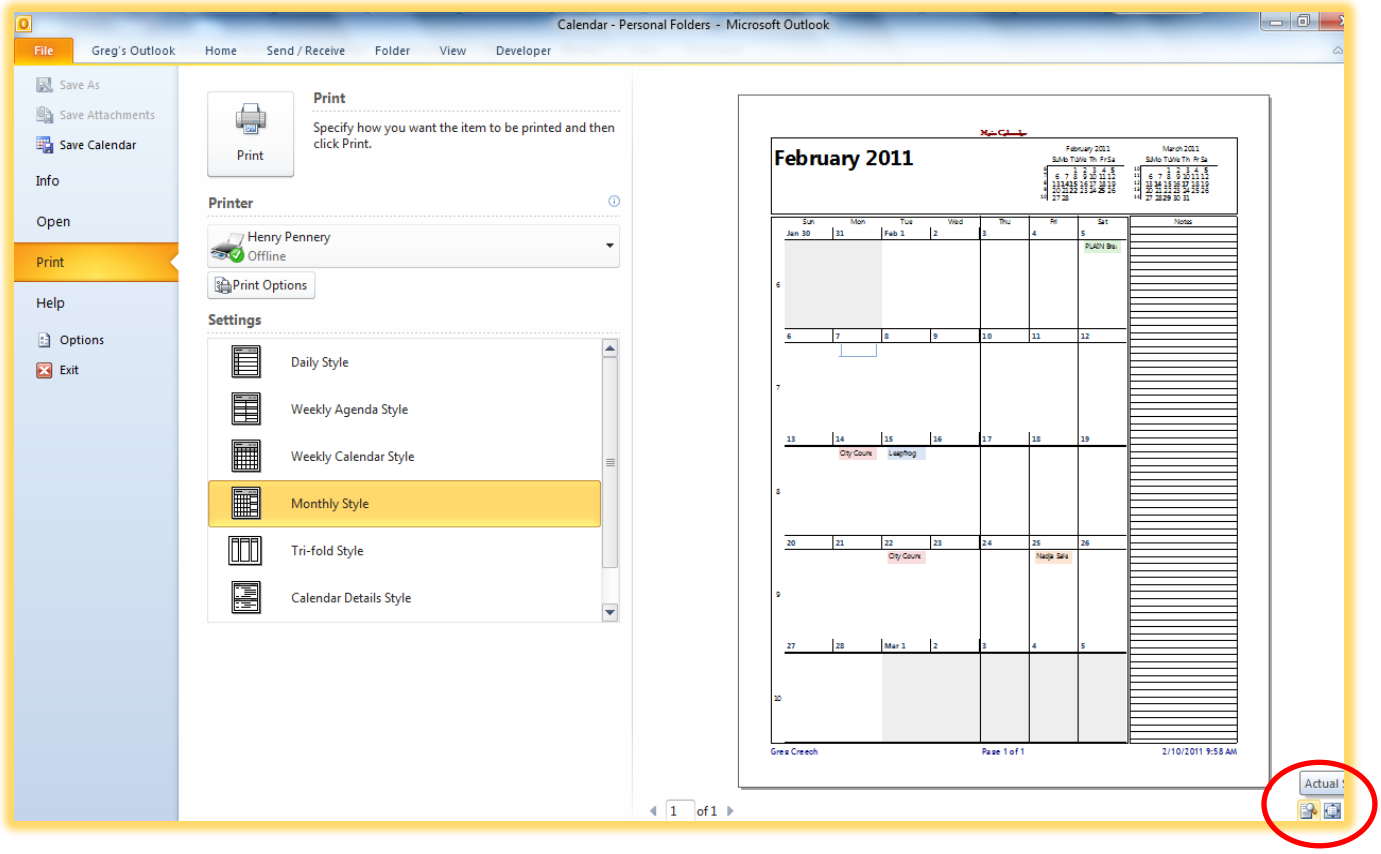
You should select your Inbox and review these settings and place your Inbox, Drafts, Sent Items in Favorites.

Printing in Outlook

Calendar

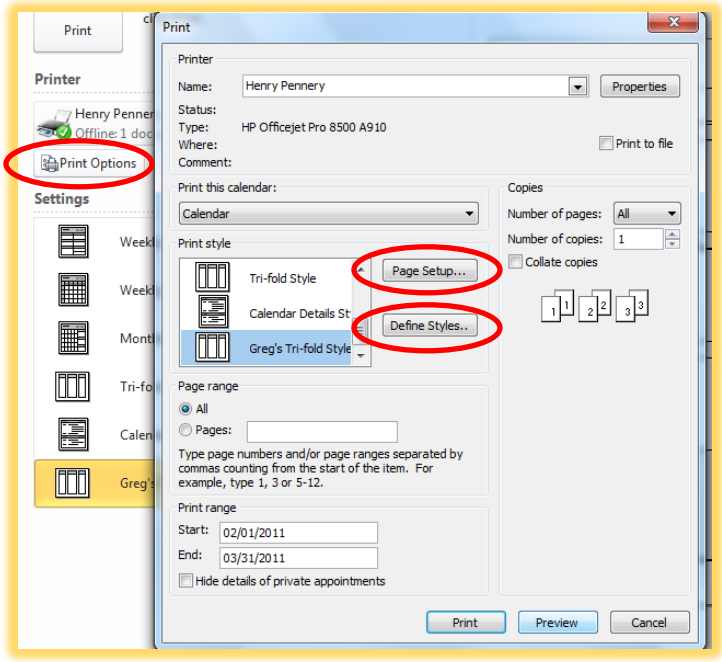
Like the other Office Applications, Outlook uses the ***New Print pan***e in ***the File Tab***. I will use ***Calendar*** and ***Contacts*** for these examples of Printing in Outlook and using the new Print Pane.

With your calendar open, press the CTRL + P keys or Click the File Tab and then Click the Print item to view your Calendar. I am viewing my Calendar in Monthly Style – click each one of these options to view your Calendar in the different styles. You may click in your Calendar in the Print Preview Pane to Zoom and you may use the buttons in the lower right corner of the screen to change your viewing area, too. I have circled the view buttons at the bottom of the screen for you to try different views, such as Actual Size or One Page.



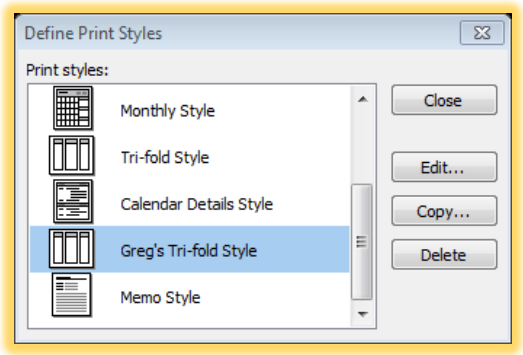
An important button for you to customize your ***Printing*** and ***Page Layout*** is the ***Print Options*** button as circled at right for you. This ***Print dialogue box*** is important for these reasons:

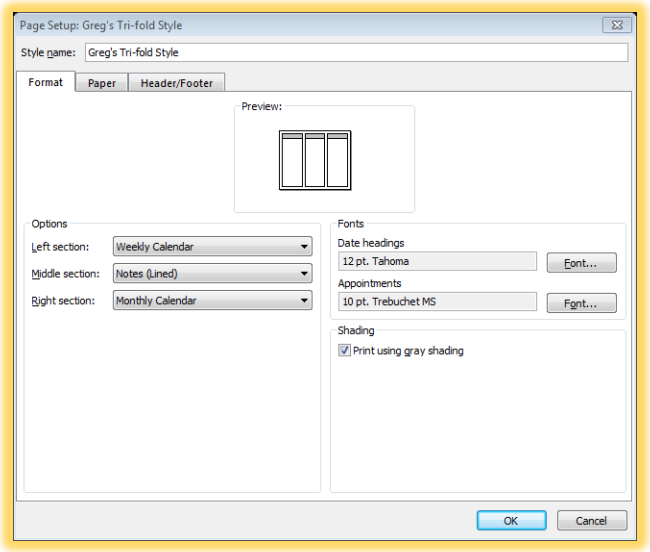
- ✓ Set your Number of Copies,
- ✓ Choose a different Printer,
- ✓ Set your Print Page Range,
- ✓ And VERY important – Choosing your Date Print Range at the bottom of the pane.



I have my own ***Print Style*** for ***Tri-fold printing*** that I am setting my date range and other items. The ***Page Setup*** button, also circled, allows you to create your ***Format*** (Displayed Below), ***Header/Footer***, and type of paper, etc.

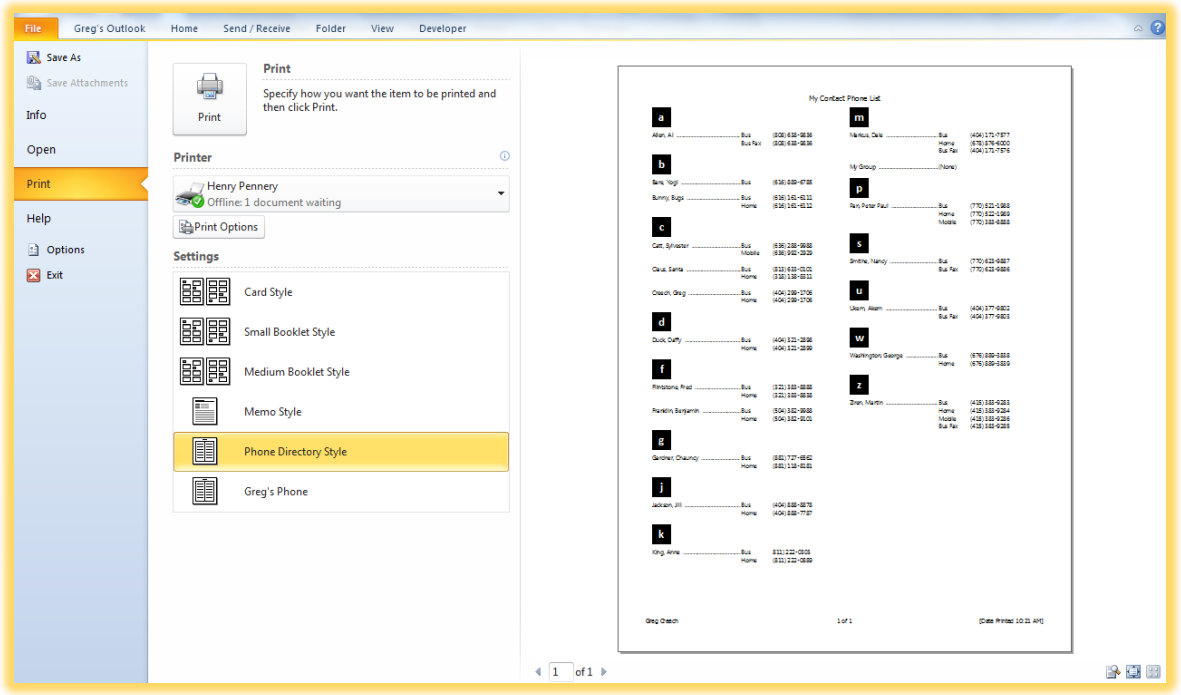
The ***Define Styles*** allows you to create your printing style as I have accomplished with my Tri Fold Style. **After making your changes Clicking Preview returns you to the File Tab**.





Contact

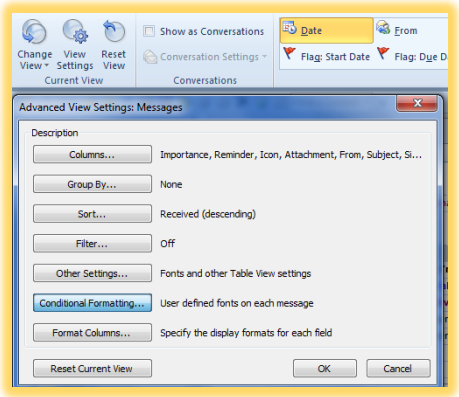
Like ***Calendar***, ***Contact printing*** has plenty of various ways of printing your contact information from card styles to phone list as I have displayed here. You can create your own style and change your ***Header/Foote***r, paper and other items using your ***Print Options, Page Setup, and Define Styles*** button as we accomplished with the ***Calendar***. Open your ***Contact folder*** and Press ***CTRL + P*** or use the ***Print item in the File Tab*** to view your ***Contacts*** in the various styles to print.



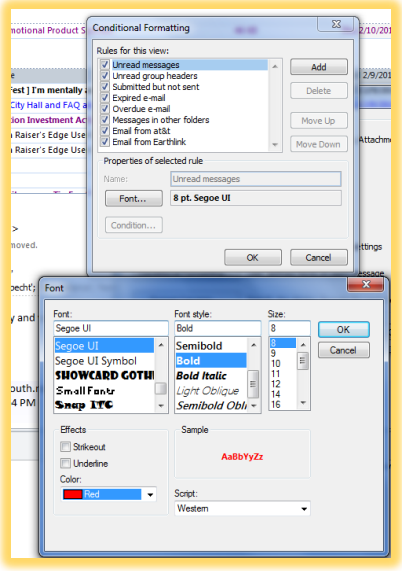
Organize and Automatic Formatting: Gone but Not Forgotten

Conditional Formatting

Outlook 2010 does not have two popular previous features of Outlook – Organize and Automatic Formatting. Outlook users enjoyed using these features to color code messages based upon criteria, such as who sent a message, account used to send a message, items in the subject, and the list goes on. People liked to changed Unread Messages that are bold to include a color to give another indication that this was a New, Unread Message. Outlook 2010 uses Conditional Formatting under the View Tab and View Settings. Here is an overview of using the replacement for Organize and Automatic Formatting; I am setting a color for messages I receive based on the account the message is sent – I have five email accounts and color code each one.

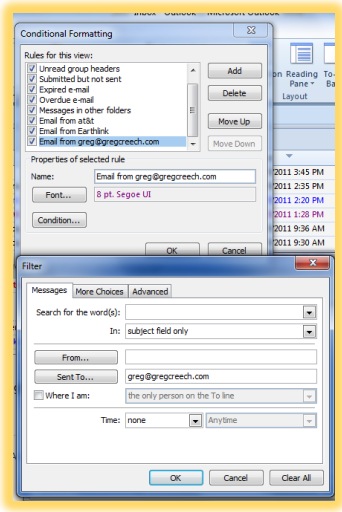


1. **You should have your Email and Inbox in view.**
2. **Click the View Tab and Click the View Settings Button.**
3. **The Advance View Settings Manager Pane opens.**



4. **Click Conditional Formatting and the Conditional Formatting Pane opens. There are several formats that Outlook uses by default, such as your unread messages being bold. With my Unread messages selected, I clicked the Font button to change my formatting so my unread messages will use the color red and include the bold. My panes are displayed at right.**
5. **I have added new Conditional Formatting that once I read a message the message unbolds but changes color based on the account that I received the message. For example, when I receive message to**

my fsdf.com account the message in in blue and when I receive messages from greg@gregcreech.com and read them the message is in purple, etc. I created the new Conditional Formatting by clicking the Add button at the Conditional Formatting pane. I gave the action a name, changed my font to purple, and then clicked the condition button and from the filter pane entered the criteria for the formatting. I clicked OK several times and any messages from this account the font turned purple.



I know this was easier in previous versions of Outlook and perhaps Organize will be back in Outlook 2020!

You may set all types of formatting based on who the message is from, accounts, and many choices.

Index

A

Account Information item....14
Account Settings....14
Arrangement Group....46
AutoArchive....53

C

Calendar Color....50
Calendar Grouping....49
Calendar Options....48
Categories!....36
Command Buttons....9
Conditional Formatting....57
Contact printing....56
Conversations View....45
CTRL + P....54
Current View....45

D

Define Send/Receive Groups....52
Download....52

E

Expand and Collapse....46

F

F9 52
Favorites....46, 53
File Tab....14
Folder tab....53
Folders....53
Format Text Tab....20

G

Groups....9

H

Headers' information....53
Home Tab....9

K

Key Tips....24
Keyboard Shortcuts....22

L

Live Preview Feature....10

M

Mail Options....18
Mark items as read....47
Master Category List....37
Message arrival....18
Message Options Tab....39
Mini Toolbar....6
Minimize the Ribbon....10

N

Navigation Pane....46
new folder....53

O

Options Tab and Pane....39
Outlook Options....15
Overlay Mode....50

P

People Pane....31
Print Options....55
Print Preview Pane....54
Print Style....55
Properties....53

Q

Quick Access Toolbar....6
Quick Steps....33

R

Reading Pane....47
Reading Pane Options....16
Ribbon....9

S

Schedule view....49
Screen Clipping....26
Screenshot editing....26
Send & Receive Group....52
Send messages....18
Send/Receive....17, 53
Show as Conversations....45
Signatures....18

Single key reading using spa 47
Single key reading using space bar 47

T

The Ribbon.....10
To-Do Bar Options.....35
Tracking 19
Tri-fold printing 55

Z

Zoom 7