

LEARNING MADE EASY



Microsoft®

Outlook® 2019

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Assign tasks
and collaborate

Keep track of your calendar
and organize your contacts

Secure your account and
handle junk mail and spam

Faithe Wempen, M.A.
Bill Dyszel

Outlook[®] 2019

for
dummies[®]
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Outlook[®] 2019

By Faithe Wempen & Bill Dyszel

**for
dummies[®]**
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Outlook® 2019 For Dummies®

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Introduction

Microsoft Outlook has become an essential business tool in the years since I covered its first pre-release versions in 1996. If you work in a company that employs more than a dozen people, it's virtually certain that most of your communications and time planning will take place in Microsoft Outlook. Knowing Outlook well can make you more successful at work. Whether you're taking directions from your boss, giving directions to your employees, organizing meetings, collaborating on important projects, or just keeping up with business, Outlook is what you'll use to get it done fast.

Not understanding Outlook is almost like not understanding how to get to work. Because Outlook is so popular, hundreds of millions of people now spend their entire workday using Outlook one way or another. Now that more companies encourage telecommuting and hire employees who work from home, Outlook is the virtual workplace for so many people.

I've had the pleasure of training literally thousands of people on all the different ways Outlook can improve their workflows and simplify their lives. People are often surprised to discover how much faster they can work when they know how to use Outlook effectively.

Microsoft Outlook was designed to make organizing your daily work blindingly easy — almost automatic. You already have sophisticated programs for word processing and number crunching, but Outlook pulls together everything you need to know about your daily tasks, appointments, email messages, and other details. More importantly, Outlook enables you to use the same methods to deal with many different kinds of information, so you have to understand only one program to deal with the many kinds of details that fill your life, such as:

- » Setting up a conference call with colleagues
- » Sending links to a webinar for a marketing campaign
- » Exchanging information about important projects

- » Reminding people to do the things they promised to do
- » Recording all the work you do so you can find what you did and when you did it

Outlook is a personal information manager that can act as your assistant in dealing with the flurry of small but important details that stand between you and the work you do. You can just as easily keep track of personal information that isn't business related and also keep business and personal information in the same convenient location.

About This Book

As you read this book and work with Outlook, you discover how useful Outlook is as well as find new ways to make it more useful for the things you do most. If you fit in any of the following categories, this book is for you:

- » You just got a job with a company that uses Outlook as its email program and you need to find out how to use it in a hurry.
- » You've used Outlook for years just because "it was there," but you know you've only used a tenth of its power. Now you're overwhelmed with work and want to plow through that mountain of tasks faster by using Outlook better.
- » You're planning to buy (or have just bought) Outlook and want to know what you can do with it — as well as how to do your work more efficiently.
- » You want an easier, faster tool for managing tasks, schedules, email, and other details in your working life.

Even if you don't fall into one of these groups, this book gives you simple, clear explanations about how Outlook can work for you. It's hard to imagine any computer user who wouldn't benefit from understanding Outlook better. If all you want is a quick, guided tour of Outlook, you can skim this book; it covers everything you need to get started. Getting a handle on most major Outlook features is fairly easy — that's how the program is designed. You can also keep this book handy as a reference for the tricks you may not need every day.

About the Version Numbers

Microsoft offers a choice in how to buy Microsoft Office: as a one-time purchase, or as a monthly or yearly subscription. If you (or your business) buy it as a one-time purchase, the product is called Office 2019. If you opt for the subscription, it's called Office 365.

Fortunately, the applications are basically the same either way. The difference is mainly a marketing thing. You might see some minor differences if Microsoft rolls out updates to Office 365 subscribers, but that shouldn't affect your ability to follow the steps in this book.



WARNING

Office 2019 only works with Windows 10. Earlier versions of Windows can't run it.

Foolish Assumptions

I assume you know how to turn on your computer and how to use a mouse and keyboard. In case you need a brush up on Windows, I throw in reminders as I go along. If Windows and Microsoft Office are strange to you, I recommend picking up (respectively) Andy Rathbone's *Windows 10 For Dummies* or Wallace Wang's *Microsoft Office 2019 For Dummies*. Or, if you're of the senior set and more interested in home use than business, check out Faithe Wempen's *Microsoft Office 2019 for Seniors For Dummies*. (All published by Wiley.)

If all you have is a copy of this book and a computer running Outlook, you can certainly do basic, useful things right away (such as send and receive email) as well as a few fun things. And after some time, you'll be able to do *many* fun and useful things.

Conventions Used in This Book

Outlook has many unique features, but it also has lots in common with other Windows programs: dialog boxes, drop-down menus, Ribbons, and so on. To be productive with Outlook, you need to understand how these features work and recognize the conventions I use for describing these features throughout this book.

Dialog boxes

You deal with more dialog boxes in Outlook than you do in many other Microsoft Office programs. You can call dialog boxes *forms*. Email message forms, appointments, name and address forms, and plenty of other common functions in Outlook use dialog boxes to ask you what you want to do. The following list summarizes the essential parts of a dialog box:

- » **Title bar:** The title bar tells you the name of the dialog box.
- » **Text boxes:** Text boxes are blank spaces into which you type information. When you click a text box, you see a blinking I-beam pointer, which means you can type text there.
- » **Control buttons:** In the upper-right corner of most dialog boxes, you find three control buttons:
 - The *Close button* looks like an X and makes the dialog box disappear.
 - The *Size button* toggles between *maximizing* the dialog box (making it take up the entire screen) and *resizing* it (making it take up less than the entire screen).
 - The *Minimize button* makes the dialog box seem to go away but really just hides it on the taskbar at the bottom of your screen until you click the icon on the taskbar to make the dialog box open again.
- » **Tabs:** Tabs look like little file folder tabs. If you click one, you see a new page of the dialog box. Tabs are just like the divider tabs in a ring binder; click one to change sections.

The easiest way to move around a dialog box is to click the part you want to use. If you're a real whiz on the keyboard, you may prefer to press the Tab key to move around the dialog box; this method is much faster if you're a touch-typist. Otherwise, you're fine just mousing around.

Ribbons and tabs

Outlook features a colorful strip across the top called the Ribbon. It's adorned with festive-looking buttons. Many of those buttons are labeled with the names of the things that happen if you click them with your mouse, such as Save, Follow Up, or

Delete. A row of tabs appears just above the Ribbon, with each bearing a label, such as Home, Send/Receive, or View. Clicking any of those words reveals an entirely different Ribbon full of buttons for a different set of tasks.

This arrangement came about because people frequently call Microsoft and ask the company to add features to Outlook that don't need to be added because they've been there all along. The Ribbon is supposed to make those mysterious, hidden features more obvious. I think a better solution is to get more people to read this book. As a public service, I'm doing what I can to make that happen. I hope you'll join the cause.

Keyboard shortcuts

Normally, you can choose any Windows command in at least two different ways (and sometimes more):

- » Click a button on the Ribbon or in the navigation pane.
- » Press a keyboard combination. An example is Ctrl+B, which means holding down the Ctrl key and pressing the letter B. (You use this command to make text bold.)
- » Press the F10 key to reveal a shortcut key and then press that key (way too much trouble but possible for those who love a challenge).

One rather confusing Outlook feature is the way many commands are hidden within the tabs on the Ribbon. If you don't know which tab has the button you need, you have to click every tab until you find the command you want. That's fine if you're a speed-reader, but hunting for rarely used commands slows down most of us. Fortunately, after you've done a task once, you can usually find your way back to do it again.

Another fast way to get at your favorite Outlook features is the Quick Access Toolbar — a tiny strip of icons in the upper-left corner of your screen. In Chapter 10, I describe how that works and how to make it do what you want.

Icons Used in This Book

Sometimes, the fastest way to go through a book is to look at the pictures — in this case, icons that draw your attention to specific types of useful information. I use these icons in this book:



WARNING

The Warning icon points to something that can prevent or cause problems.



REMEMBER

The Remember icon points out helpful information. (Everything in this book is helpful, but this stuff is even *more* helpful.)



TIP

The Tip icon points out a hint or trick for saving time and effort or something that makes Outlook easier to understand.



TECHNICAL
STUFF

The Technical Stuff icon marks background information you can skip, although it may make good conversation at a really dull party.

1

Getting Started with Outlook 2019

IN THIS PART . . .

Learn how to use Outlook to read and send email, send attachments, and create appointments and tasks as well as how to use the calendar feature to help you meet important deadlines.

Explore the various parts of Outlook, including views, menus, and folders, as well as the search feature.

Discover how to create contacts and calendar appointments as well as how to use dragging, how to create and modify tasks, and how to further enhance your productivity.

IN THIS CHAPTER

- » Reading and creating email
- » Sending files by email
- » Checking your calendar
- » Entering appointments and contacts
- » Managing tasks
- » Keeping notes

Chapter 1

Outlook Features You Really Need to Know

I'm kicking off this book with Outlook's Greatest Hits — the things you'll want to do with Outlook every single day. The list sounds simple enough: sending email, making appointments, and so on. But most people only use about 5 percent of Outlook's power. Even if you move up to using 10 percent of Outlook's features, you'll be amazed at how this little program can streamline your life and spiff up your communications. People get pretty excited about Outlook, even if they take advantage of only a tiny fraction of what the package can do. But there's more here than meets the eye; Outlook does ordinary things extraordinarily well. I know you want to do the same, so read on.

Explaining Why So Many People Use Outlook

Millions of people use Outlook because millions of people use Outlook. That's not redundant — Outlook is the standard tool for communicating, collaborating, and organizing for hundreds of millions of people around the world. When so many

people use the same tool for organizing the things they do individually, it becomes vastly easier for everyone to organize the things they do together by using that tool. That's the case with Outlook. It's a powerful tool even if you work all alone, but that power gets magnified when you use it to collaborate with others.

Doing Anything in Outlook the Easy Way

Well, okay, maybe you can't use Outlook to decipher hieroglyphics, but if you know a little about basic email techniques, you can do a lot in Outlook, such as click a button to do something, to view something, or to complete something.

Using Outlook is so easy, I can sum it up in just a few simple sentences to cover the most common tasks:

- » **Open an item and read it:** Double-click the item. It opens in a new window.
- » **Create a new item:** Click a folder icon in the Folder pane, click the New button on the Ribbon at the top of the screen, and fill out the form that appears. When you're done, click the Send button — or, for anything other than an email message, click the Save & Close button.
- » **Delete an item:** Click the item once to select it and then click the Delete button on the Ribbon at the top of the screen. The Delete button has a black X. You can also press the Delete key on your keyboard.
- » **Move an item:** Use your mouse to drag the item to where you want it.

OUTLOOK 2019 OR OUTLOOK 365?

Starting with Office 2016, Microsoft kicked off a new sales strategy that lets customers rent software rather than buying boxes of discs to install. That's good news for you. Instead of having to shell out hundreds of dollars for new versions of Microsoft Office every few years, you can now just pay a small amount every month for a subscription to Office 365. Depending on the edition you choose, you can put the software on up to five computers. You also get online storage for your files and advanced email services as part of the package. As I mentioned in the Introduction, the way you acquire Office determines the product name. The subscription versions are called Office 365; the stand-alone purchase versions are called Office 2019.

Does that seem too simple? No problem. If you have an itch to complicate things, you *could* try to use Outlook while hopping on a pogo stick or flying a jet plane. But why? These four tricks can take you a long way.

Outlook can also do some sophisticated tricks, such as automatically sorting your email or creating form letters, but you'll need to understand a few details to take advantage of those tricks. The other 300-plus pages of this book cover the finer points of Outlook. If you only wanted the basics, I could've sent you a postcard.



REMEMBER

The figures you see in this book and the instructions you read assume you're using Outlook the way it comes out of the Office 2019 box from Microsoft (or as a download from Office 365) — with all the standard options installed. If you don't like the way the program looks (or how things are named) when you install Outlook, you can change many of the things you see. If you change too much, however, some instructions and examples I give you won't make sense because then the parts of the program that I talk about may have names you gave them rather than the ones Microsoft originally assigned. The Microsoft people went to great lengths to make Outlook's features easy to find. I suggest leaving the general arrangement alone until you're comfortable using Outlook.

Using Email: Basic Delivery Techniques

Email is Outlook's most popular feature. I've run across people who didn't know Outlook could do anything but exchange email messages. It's a good thing that Outlook makes it so easy to read your email, although it's too bad so many people stop there.

Reading email

When you start Outlook, you normally see a screen with three columns. The left-most column is the Folder pane, which lets you switch between different modules in Outlook to perform different tasks. The second column from the left is your list of messages; the right column (called the Reading pane) contains the text of one of those messages. If the message is short enough, you may see its entire text in the Reading pane, as shown in Figure 1-1. If the message is longer, you'll have to open it, or scroll down in the Reading pane, to see the whole thing.

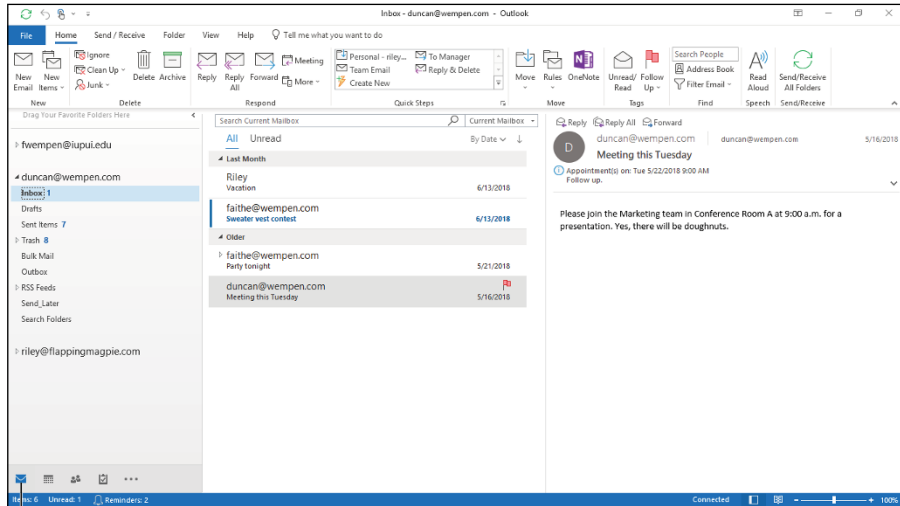


FIGURE 1-1:
A received message in the Inbox.

Mail button

To see an entire message, follow these steps:

1. **Click the Mail button in the Navigation bar to make sure you are in the Mail module.**

You don't need this step if you can already see your messages.

2. **Double-click the title of a message.**

Now you can see the entire message on its own window.

3. **Press Esc to close the message.**

The message window closes. (Note that closing a message does not delete it.)



TIP

A quick way to skim the messages in your Inbox is to click a message and then press the ↑ or ↓ key. You can move through your message list as you read the text of your messages in the Reading pane.

If you feel overwhelmed by the number of email messages you get each day, you're not alone. Billions and billions of email messages fly around the Internet each day, and lots of people are feeling buried in messages. In Chapter 6, I show you the secrets of sorting and managing your messages, along with the Conversations feature, which makes it easy to deal with extended email discussions.

Answering email

Anytime you're reading an email message in Outlook, buttons labeled Reply and Reply All appear somewhere near the top of the screen. That's a hint.

To reply to a message you're reading, follow these steps:

1. **In the Mail module, select the message to which you want to reply.**
2. **Click the Reply button on the Home tab of the Ribbon.**
3. **Type your response.**
4. **Click the Send button.**

If you're reading a message sent to several people besides you, you have the option of sending a reply to everyone involved by clicking the Reply All button.



WARNING

Some people get carried away with the Reply All button and live to regret it. If you get a message addressed to lots of other people and click the Reply All button to fire back a snide response, you could instantly offend dozens of clients, bosses, or other bigwigs. Use Reply All when you need it, but make sure you really know who's getting your message before you click the Send button.

When you reply to a message, by default, Outlook includes the text of the message that was sent to you. Some people like to include original text in their replies, but some don't. In Chapter 5, I show you how to change what Outlook automatically includes in replies.

Creating new email messages

At its easiest, the process of creating a new email message in Outlook is ridiculously simple. Even a child can do it. But if you can't get a child to create a new email message for you, you can do it yourself.

If you see a button labeled New Email in the upper-left corner of the screen, just click it, fill out the form, and click the Send button. How's that for simple? If you don't see the New Email button, follow these steps instead:

1. **In the Mail module, click the New Email button on the Home tab of the Ribbon.**

The New Message form opens.

2. To make sure you are in the Mail module, click Mail in the Navigation bar in the lower-left corner of the Outlook screen.
3. **Fill out the New Message form.**

Put the recipient's address in the To box, type a subject in the Subject box, and type a message in the main message box.

4. **Click the Send button.**

Your message is on its way!

If you want to send a plain email message, these steps are all you have to do. If you prefer to send a fancier email, Outlook provides the bells and whistles — some of which are actually useful. For example, you might send a High Priority message to impress some big shots or send a Confidential message about a hush-hush topic. (Discover the mysteries of confidential email in Chapter 4.)

Sending a File

Some people swear they do nothing but exchange email all day. Swearing is exactly what I'd do if I were in their shoes — believe me. If you're lucky, you probably do lots of things other than exchange email; you probably do most of your daily work in programs other than Outlook. You might create documents in Microsoft Word or build elaborate spreadsheets with Excel. When you want to send a file by email, Outlook gets involved, although sometimes, it works in the background.

You can share a file by sending a link to a file stored on your OneDrive. If the file isn't on your OneDrive, you'll be prompted to save a copy of it there before you share.



REMEMBER

OneDrive is a cloud-based file storage system that's available for free to anyone with a Microsoft account — and that's pretty much anyone who uses Windows and/or Office. You don't have to use OneDrive for storing your Office application files, but there are many advantages to doing so, like always having access to them no matter where you are, and no matter what disaster might have befallen your home, office, or computer. (Not to get morbid, but these things do happen.)

To email a file as a link, follow these steps:

1. Open the document in Microsoft Word.

The document opens on-screen.

2. Click Share in the upper-right corner of the Word window.

3. If the Share dialog box appears, click OneDrive.

The Share dialog box pops up if the file isn't already saved on your OneDrive. Your file has to be saved there before you can share a link. (If you don't want to save it to OneDrive, see the next set of steps for another way to share.)

4. In the Share task pane, enter the email address of the person you want to send the file to.

To enter multiple addresses, separate them with semicolons.