LEARNING MADE EASY

Covers Outlook® 2021 & Office 365® version

Microsoft® Outlook®

for dummies®
A Wiley Brand

Take control of your Inbox with folders and rules

Integrate Outlook with iCloud, Google, and other services

Boost productivity with task lists and calendars

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Microsoft Office Specialist
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Outlook®

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Outlook®

By Faithe Wempen, M.A.

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Outlook® For Dummies®

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Contents at a Glance

Introduction 1

Part 1: Getting Started with Outlook 9

CHAPTER 1: A First Look at Outlook 11
CHAPTER 2: Taking a Tour of the Outlook Interface 25
CHAPTER 3: Getting on the Fast Track with Handy Shortcuts 43

Part 2: Taming the Email Beast 57

CHAPTER 4: Email Essentials 59
CHAPTER 5: Taking Email to the Next Level 81
CHAPTER 6: Conquering Your Mountain of Messages 103
CHAPTER 7: Managing Multiple Email Accounts and Data Files 143

Part 3: Keeping Track of Contacts, Dates, Tasks, and More 165

CHAPTER 8: Your Little Black Book: Managing Your Contacts 167
CHAPTER 9: Organizing Your Schedule with the Calendar 191
CHAPTER 10: Staying on Task: To-Do Lists and More 219

Part 4: Taking Outlook to the Next Level 245

CHAPTER 11: Merging Mail From Outlook to Microsoft Word 247
CHAPTER 12: Integrating Outlook with Google and iCloud 261
CHAPTER 13: Outlook for iOS and Android Devices 273
CHAPTER 14: Seeing It Your Way: Customizing Outlook 285

Part 5: Outlook at Work 305

CHAPTER 15: Outlook on the Job 307
CHAPTER 16: Using Outlook on the Web: Your Outlook Away From Outlook 329

Part 6: The Part of Tens 347

CHAPTER 17: Ten Shortcuts Worth Taking 349
CHAPTER 18: Ten Things You Can't Do with Outlook 359
CHAPTER 19: Ten Things You Can Do After You're Comfy 365

Index 371

Table of Contents

INTRODUCTION 1

Outlook: What Is It Good For? 1
About This Book. 2
About Version Numbers 3
Foolish Assumptions 4
Interface Conventions Used in This Book 4
    Dialog boxes and windows 5
    Ribbons and tabs 6
    Keyboard shortcuts 7
Icons Used in This Book 8
Beyond the Book 8

PART 1: GETTING STARTED WITH OUTLOOK 9

CHAPTER 1: **A First Look at Outlook** 11

Why Outlook? 11
Doing (Almost) Anything with a Few Clicks 12
Switching to the Simplified Ribbon 13
Using Email: Basic Delivery Techniques 14
    Reading email. 14
    Answering email 15
    Creating new email messages 16
    Sending a file 16
Maintaining Your Calendar 18
    Entering an appointment 18
    Managing your schedule 20
Adding a Contact 20
Entering a Task. 21
Taking Notes 23

CHAPTER 2: **Taking a Tour of the Outlook Interface** 25

How Outlook Fits Into the Office Picture 25
Exploring Outlook’s Main Screen 26
    Moving between modules 27
    Using the Folder pane 29
    Changing views in a module 30
    Working with the To-Do bar 31
    Working with the Daily Task List 32
    Taking a peek 33
    Navigating folders 33

- Taking Control with the Ribbon 35
  - Viewing ScreenTips 36
  - Using the New Item(s) button 37
- Finding Things in a Flash with Search 38
  - Simple searching 38
  - Advanced searching 39
- Getting Help 41
  - Just do it for me! 41
  - Just tell me what to do! 42

CHAPTER 3: Getting on the Fast Track with Handy Shortcuts 43

- Learning the Value of Dragging 43
- Creating Other Outlook Items from Email Messages 45
  - Creating a task from an email message 45
  - Scheduling an appointment from an email message 48
  - Creating a new contact from an email message 50
- Creating Email Messages from Other Items 51
  - Creating an email from a contact 51
  - Creating an email from an appointment 52
- Keeping the Interface Simple 53
- Zen of the Right Button 55

PART 2: TAMING THE EMAIL BEAST 57

CHAPTER 4: Email Essentials 59

- Front Ends and Back Ends 59
- Creating Messages 60
  - The quick-and-dirty way 60
  - The slow but complete way 61
  - Blind copying for privacy 64
  - Formatting a message 64
  - Setting the message importance 65
  - Setting sensitivity 66
  - Setting other message options 67
  - Adding an Internet link to an email message 68
  - Dictating a message 68
- Reading and Replying to Email Messages 69
  - Viewing previews of message text 70
  - Sending a reply 72
  - Resending messages 74
  - Read it to me! 75
- That’s Not My Department: Forwarding Email 76
- Deleting Messages 78
- Saving a Draft of a Message 79
- Saving a Message as a File 79

CHAPTER 5: Taking Email to the Next Level 81

Nagging by Flagging 82
  One-click flagging 82
  What kind of flagging have you got? 83
  Setting a flag's status 84
  Setting flags for different days 84
  Changing the default flag date 85
  Adding a reminder to a flag 86
  Attaching a flag to an outgoing message 87
  Changing the date on a reminder 89
Saving Copies of Your Messages — or Not 89
Setting Your Reply and Forward Options 90
Adding Comments to a Reply or a Forward 92
Sending Attachments 93
  Sending a file from Outlook 93
  Sending a file from another application 95
Emailing Screenshots 98
Creating Signatures for Your Messages 99
Translating a Foreign-Language Message 102

CHAPTER 6: Conquering Your Mountain of Messages 103

Organizing Folders 104
  Creating a new mail folder 104
  Moving messages to another folder 106
Organizing Your Email with Search Folders 107
  Setting up a search folder 107
  Using a search folder 109
  Deleting a search folder 109
Playing by the Rules 110
  Creating a rule: the complete method 110
  Creating a rule: the quick method 114
  Running a rule 115
Filtering Junk Email 116
  Fine-tuning the filter's sensitivity 116
  Filtering your email with sender and recipient lists 118
  Filtering domains 120
Archiving for Posterity 121
  Setting up AutoArchive 122
  Setting AutoArchive for individual folders 123
  Starting the archive process manually 125
  Finding and viewing archived items 126
  Closing the archive data file 128
Arranging Your Messages 128
  Filtering your messages 129
  Sorting your messages 129

Viewing conversations 132
Ignoring conversations 133
Cleaning up conversations 134
Simplifying Tasks Using Quick Steps. 136
Creating and managing Quick Steps. 140
Creating Quick Parts to save keystrokes 142

CHAPTER 7: **Managing Multiple Email Accounts and Data Files** 143
Choosing an Email Provider. 143
Buying Your Own Domain Name 145
Setting Up Email Accounts in Outlook 146
Understanding POP3 vs. IMAP. 146
Collecting the needed information for setup 147
Setting up an account using automatic settings 148
Setting up an account using manual settings 150
Sending Messages from Different Accounts .153
Modifying Mail Account Settings. 155
Changing the basic account settings 155
Changing the mail server 156
Updating your stored email password. 157
Managing Outlook Data Files. 158
Removing an account from Outlook. 158
Purging old data files 159
Moving a data file to another computer 160

PART 3: KEEPING TRACK OF CONTACTS, DATES, TASKS, AND MORE. 165

CHAPTER 8: **Your Little Black Book: Managing Your Contacts** 167
Putting in Your Contacts: Names, Numbers, and Other Stuff. 168
The quick-and-dirty way to enter contacts 168
The slow, complete way to enter contacts. 169
Viewing Your Contacts 174
Sorting a view. 175
Rearranging views 176
Using grouped views. 177
Flagging Your Friends 179
Using Contact Information. 181
Searching for contacts 181
Finding a contact from the Mail module 183
Forwarding a business card. 184

Gathering People Into Groups. 185
  Creating a Contact group 185
  Editing a Contact group 187
  Using a Contact group 187
  Adding pictures to contacts 188

CHAPTER 9: Organizing Your Schedule with the Calendar 191

Getting a Good View of Your Calendar. 191
  Choosing a view 192
  Viewing calendar items. 193
Time Travel: Viewing Different Dates in the Calendar 193
Meetings Galore: Scheduling Appointments. 196
  The quick-and-dirty way to enter an appointment. 196
  The complete way to enter an appointment. 197
  Changing an appointment’s date or time .199
  Moving an appointment by dragging 199
  Copying an appointment by dragging 200
  Moving an appointment using the Appointment form 200
  Adjusting the length of an appointment .201
  Cancelling an appointment 203
  Scheduling a recurring appointment 203
  Changing a recurring appointment. 205
Printing Your Appointments 206
Adding Holidays. 208
Handling Multiple Calendars 209
  Creating multiple calendars. 210
  Managing multiple calendars 211
Sharing Calendars 212
  Sharing a calendar associated with an Exchange account 213
  Accepting a calendar-share invitation 215
  Calendar-sharing options for non-Exchange accounts 216

CHAPTER 10: Staying on Task: To-Do Lists and More 219

Entering New Tasks in the Tasks Module 220
  The quick-and-dirty way to enter a task. 220
  The regular way to enter a task. 221
Working with Tasks Folders 223
  Tasks vs. To-Do List: What’s the difference? 223
  Browsing a data file’s folders. 225
  Creating new Tasks lists 226
  Renaming a Tasks list 227
  Moving tasks between lists 227
Switching Up the View 228

Editing Your Tasks 230
    The quick-and-dirty way to change a task 230
    The regular way to change a task 231
    Deleting a task 233
Managing Recurring Tasks 234
    Creating a regenerating task 235
    Skipping a recurring task once 236
Marking Tasks as Complete 237
    Marking it off 237
    Picking a color for completed or overdue tasks 238
Using the To-Do Bar (and List) 239
Viewing the Daily Task List 240
Working with the To-Do Module 242

PART 4: TAKING OUTLOOK TO THE NEXT LEVEL 245

CHAPTER 11: **Merging Mail From Outlook to Microsoft Word** 247
Making Mailing Label Magic 248
Making and Using a Merge Template 253
Mastering Form Letter Formalities 254
Merging to Envelopes 257
Merging to Email 258

CHAPTER 12: **Integrating Outlook with Google and iCloud** 261
Integrating Google Calendar with Outlook 262
    Subscribing to a Google Calendar in Outlook 262
    Importing a Google Calendar into Outlook 264
Accessing Gmail Contacts in Outlook 266
Integrating Outlook with iCloud 269
    Installing the iCloud app on your PC 269
    Setting up Outlook to work with iCloud 271
    Using iCloud content in Outlook 272

CHAPTER 13: **Outlook for iOS and Android Devices** 273
Understanding the Mobile Difference 274
Accessing Mobile Email 275
    Setting up Outlook on a mobile device 275
    Reading email 275
    Replying to email 276
    Composing email 277
    Archiving, scheduling, and deleting email messages 278
    Deleting messages 281
    Managing groups of messages 281

Using Your Mobile Calendar 282
  Navigating the mobile calendar 282
  Creating a new appointment 282

CHAPTER 14: **Seeing It Your Way: Customizing Outlook** 285
Customizing the Quick Access Toolbar 286
  Displaying and positioning the QAT 286
  Adding and removing commands from the QAT 288
Customizing the Ribbon 289
  Creating a new tab and group 290
  Adding and removing commands on the Ribbon 292
  Reordering Ribbon tabs 293
  Resetting Ribbon customization 294
  Hiding or deleting a Ribbon tab or group 294
Playing with Columns in Table/List Views 294
  Adding a column 295
  Moving a column 296
  Widening or narrowing a column 296
  Removing a column 297
Sorting Items 298
  Sorting from Table view 298
  Sorting from the Sort dialog box 298
Grouping Items 299
Saving Custom Views 300
Using Categories 300
  Assigning a category 301
  Renaming a category 301
  Changing a category color 303
  Assigning a category shortcut key. 303

PART 5: OUTLOOK AT WORK 305

CHAPTER 15: **Outlook on the Job** 307
Planning Meetings with Outlook 308
  Organizing a meeting 308
  Responding to a meeting request. 311
  Checking responses to your meeting request 313
  Taking a vote 314
  Casting your vote. 315
  Assigning tasks. 316
  Sending a status report 317
Enabling Coworkers to Help You with Your Work 318
  Giving delegate permissions 318
  Opening someone else's folder 319

Viewing Two Calendars Side by Side 320
  Setting access permissions 321
  Viewing two accounts 323
Managing Your Out of Office Message. 325
Managing Your Address Books 326

CHAPTER 16: **Using Outlook on the Web: Your Outlook Away From Outlook** 329
Signing In to Outlook on the Web 330
Exploring the Outlook on the Web Interface. .331
Getting Caught Up on Web Email Basics 333
  Reading messages. 333
  Sending a message 334
  Setting message importance 335
  Flagging messages. 336
Organizing Contacts 336
  Sorting your contacts 336
Using Your Calendar 338
  Viewing your calendar 338
  Entering an appointment 339
  Moving an appointment 341
Creating a To-Do List. 341
Exploring Your Options. 342
  Automated vacation replies/out of office message 343
  Creating a signature 345

PART 6: THE PART OF TENS 347

CHAPTER 17: **Ten Shortcuts Worth Taking** 349
Using the New Item Button 350
Sending a File to an Email Recipient 350
Sending a Link to a File 352
Sending a File From a Microsoft Office Application 353
Turning a Message Into a Meeting 354
Finding Something 354
Undoing Your Mistakes. 354
Using the Go to Date Dialog Box. 355
Adding Items in List Views 355
Sending Repeat Messages 356
Resending a Message 357

CHAPTER 18: **Ten Things You Can’t Do with Outlook** 359
Create a Unified Inbox 360
Insert a Phone Number Into Your Calendar 360
Open a Message From the Reading Pane 360

Perform Two-Sided Printing. 361
Search and Replace Area Codes 361
Print a List of Meeting Attendees 361
Enlarge the Type in the Calendar Location Box 362
Create Contact Records for All Recipients of an Email. 362
Track Time Zones for Meetings 362
Back Up Outlook Data Easily 363

CHAPTER 19: **Ten Things You Can Do After You're Comfy** 365
Take Notes 366
Customize the Quick Access Toolbar 366
Smarten Up Your Messages with Smart Art 367
Translate Your Email Messages. 368
Add Charts for Impact. 368
Use Symbols in Email 369
Open Multiple Calendars 369
Superimpose Calendars 369
Select Dates as a Group 370
Pin a Contact Card. 370

INDEX 371

Introduction

Microsoft Outlook has become an essential business tool in the years since it was first released in the 1990s. If you work in a company that employs more than a dozen people, it's a pretty good bet that you'll be using Microsoft Outlook to manage your email and calendar. Whether you're giving or taking directions, organizing meetings, collaborating on important projects, or just keeping up with business, Outlook is what you'll use to get it done fast. Outlook has become even more important to businesses in recent years, with more companies encouraging telecommuting and hiring employees who work from home.

Outlook is not just for business use, though — far from it. Outlook is also the application of choice for millions of people who use it for their own personal communication needs. Students use it to communicate with their teachers and fellow students about academic projects. Parents use it to manage the family calendar so that everyone knows where they need to be. Hobbyists use it to communicate with other people who share their passion for whatever makes them smile, whether it's birdwatching, woodworking, or role-playing games.

Outlook: What Is It Good For?

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 (or play) you do. It sends and receives email, maintains your address book, schedules meetings and appointments, tracks your to-do list, and more, all in one place.

Here are just a few of the cool things it can do for you:

- Send email messages to individuals or groups, including attachments, graphics, text formatting, signature blocks, and more.
- Keep an address book of all your contacts with consistently up-to-date information.

- Manage multiple calendars (such as for work and for home) and overlay their appointments in a single view so you can make sure there aren't any conflicts.
- Schedule a meeting and reserve a conference room in your workplace, then send out meeting invitations and track who has accepted or declined.
- Organize hundreds of little pieces of data with digital "sticky notes" that you can search, sort, and color-code.

About This Book

Outlook For Dummies Office 2021 Edition is your one-stop guide to all things Outlook. Whether you're brand-new to Outlook or a long-time casual user looking to go deeper, you'll find the help you need here. The book is organized in six parts, each with a specific theme:

Part 1: Getting Started with Outlook. Start here if you're not already familiar with Outlook at a basic level. Here you'll get an overview of what Outlook does, take a guided tour of the interface, and learn some handy shortcuts for getting around.

Part 2: Taming the Email Beast. If you're mostly interested in Outlook's email capabilities, start here. You'll learn how to send and receive messages with all kinds of different options, like attachments, special formatting, signature lines, and read receipts. You'll also learn how to organize your messages into folders, create mail-handling rules that automatically move incoming messages into certain folders, and set up multiple email accounts to work with Outlook.

Part 3: Keeping Track of Contacts, Dates, Tasks, and More. In this part you'll learn about several of Outlook's tools for organizing your busy life and schedule. You'll see how to set up your address book (which Outlook calls *Contacts*), how to schedule meetings and appointments on your calendar(s), and how to manage your to-do list.

Part 4: Taking Outlook to the Next Level. This part tackles some less common topics that may be of interest to you. You'll find out how to integrate Outlook with other Office applications and with Google and iCloud services, for example. You'll also learn how to use Outlook on mobile devices that run iOS or Android, and how to customize Outlook to better serve you.

Part 5: Outlook at Work. Some Outlook features only work if your office uses an Exchange mail server (and a lot of offices do). You'll learn about those features in this part, and you'll find out how to use Outlook.com and the Outlook Web app for telecommuting.

Part 6: The Part of Tens. As is customary in a Dummies book, I wrap things up by providing some Top 10 lists that you can skim at your leisure. You'll learn about ten time-saving shortcuts, ten things that Outlook actually *can't* do (so you can stop banging your head against the wall trying to get them to work!), and ten cool features that most people don't know about.

About Version Numbers

Outlook is part of a suite of applications called Microsoft Office. Microsoft offers a choice in how to buy Microsoft Office: as a subscription or as a one-time purchase.

The one-time-purchase version has a version number that represents the year it came out, like Office 2021. There are different editions of this product for different demographics, like Professional, Home and Student, or Enterprise. You get periodic automatic updates (if that option is enabled), but there are no major upgrade options. That means if you plan to upgrade to the next major release in the future, you will have to buy it at full price.

The subscription method is called Office 365, and it's the most popular one, both for business and personal uses. Office 365 is a general name for the subscription offering; 365 is not a version number. With the subscription method, you always have the most recent version at no extra charge, even if a major new version comes out. Microsoft silently rolls out new features and tweaks nearly every month via automatic download and installation. One day you'll open up Outlook and notice a new feature, or you'll see that the interface looks slightly different (and hopefully you'll think it's an improvement!). There are different Office 365 subscription plans for individuals, businesses, and schools that contain different combinations of the various applications. (They all include Outlook, though.)

Some business IT departments *really* don't like the fact that Microsoft frequently rolls out updates to Office without advance warning. They like to be able to control what updates are installed — and when. They like to get the updates well in advance and test them before they allow them to roll out to the users they support, to make sure there are no conflicts or bugs that will cause problems with other essential software that they use. For these companies, Microsoft offers an alternative: They will sell these companies a version of Office 2021 that does not automatically update. It stays exactly the same for months at a time, with changes rolled out every 6 months. This roll-out method is called the Long-Term Servicing Channel (LTSC).

So, generally speaking, what does all this mean to you?

- You probably have Office 365. Most people do.
- Which version you have really doesn't matter all that much. All versions get updated — just on different schedules.
- You might see some minor differences in your Outlook interface compared to what's shown and described in this book. This is unavoidable.

Foolish Assumptions

As I wrote this book, I made certain assumptions about you, its reader. For one thing, I assume you know how to turn on your computer, use a mouse and keyboard, and navigate your way around Microsoft Windows 10. If Windows or Microsoft Office is strange to you, I recommend picking up Andy Rathbone's *Windows 10 For Dummies* or Wallace Wang's *Microsoft Office For Dummies*, respectively. Or, if you're of the senior set and more interested in home use than business, check out my book *Microsoft Office For Seniors For Dummies.* (All are published by Wiley.)

And speaking of Windows, I'm assuming you have the desktop version of Outlook running on Windows 11. (Yes, it also runs on laptops.) There are online and mobile versions of Outlook, and in fact I do cover them in Chapter 16, but most of this book is for users of the version that runs on Windows computers. There is also a Mac version of Outlook, and it works basically the same as the Windows version, but I don't cover it specifically.

I'm *not* making any assumptions about whether you're a home or business user; there's plenty of help in this book for both.

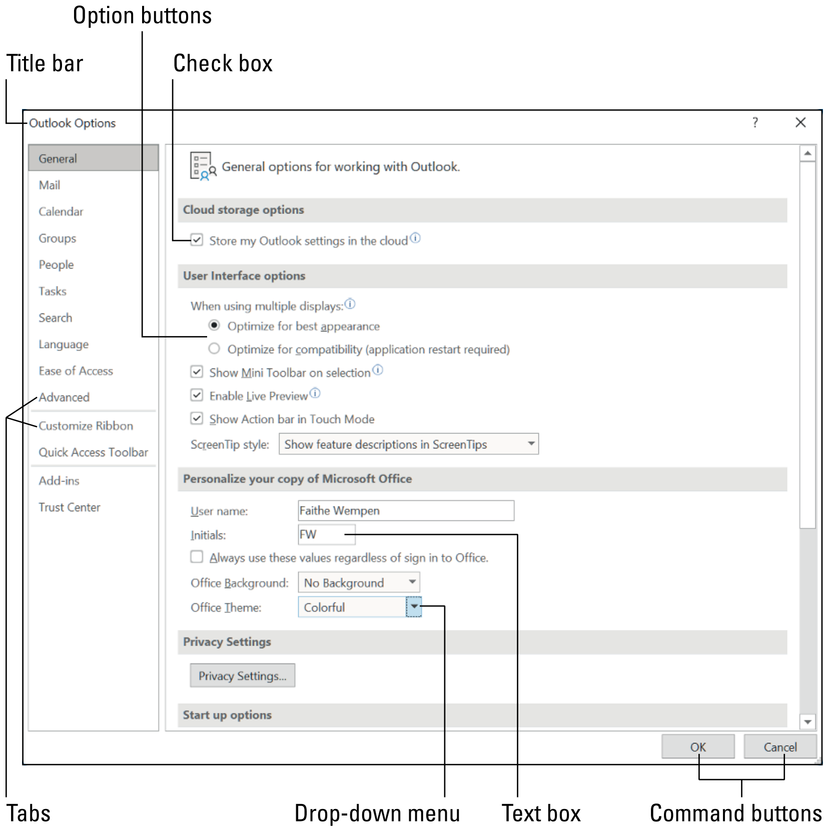
Interface Conventions Used in This Book

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 and windows

You deal with more dialog boxes in Outlook than you do in many other Microsoft Office programs. A dialog box is a box that pops up asking for information. Sometimes it's super simple, like a warning message asking you to click OK to continue. Other times there are dozens of options, like the dialog box that lets you set Outlook program options (covered in Chapter 14).

Here are the essential parts of a dialog box. You can see them in action in Figure I-1.


Option buttons
Title bar
Check box
Outlook Options
?
×
General
Mail
Calendar
Groups
People
Tasks
Search
Language
Ease of Access
Advanced
Customize Ribbon
Quick Access Toolbar
Add-ins
Trust Center
Privacy Settings...
OK
Cancel
Tabs
Drop-down menu
Text box
Command buttons

General options for working with Outlook.

Cloud storage options

☑ Store my Outlook settings in the cloud

User Interface options

When using multiple displays:
● Optimize for best appearance
○ Optimize for compatibility (application restart required)
☑ Show Mini Toolbar on selection
☑ Enable Live Preview
☑ Show Action bar in Touch Mode
ScreenTip style: Show feature descriptions in ScreenTips

Personalize your copy of Microsoft Office

User name: Faithe Wempen
Initials: FW
☐ Always use these values regardless of sign in to Office.
Office Background: No Background
Office Theme: Colorful

Privacy Settings

Start up options

FIGURE I-1: A typical dialog box that showcases some of the control types.

- **Title bar:** The title bar tells you the name of the dialog box or window.
- **Text boxes:** Text boxes are blank spaces into which you type information. When you click a text box, you see a blinking cursor, which means you can type text there.
- **Option buttons:** These are sets of round buttons where you can only select one of them at a time. When you click one, the others become unselected. They're used for situations where it's impossible to have more than one thing at a time, like Portrait vs. Landscape page orientation.
- **Check boxes:** These are square boxes for individual yes/no toggles. Even if there's a set of them, each one is separate.
- **Drop-down menus:** These look like rectangular buttons, but they have a down-pointing arrow at the right side. When you click them, a menu of options appears; click an option to make your selection.
- **Command buttons:** These rectangular buttons execute commands, like OK or Cancel. Sometimes they have an ellipsis on them (three dots, like this: . . .), which indicates that they open another dialog box.
- **Tabs:** Some dialog boxes have multiple pages, and each page has a tab you can click to display it. In Figure I-1 the tabs are just words in a bar along the left side, but in some dialog boxes the tabs run across the top of the dialog box window and look like actual file folder tabs.

Windows are closely related to dialog boxes; they're large boxes (typically resizable) designed to help you create or manage data. For example, when you schedule a new appointment on the calendar, a New Appointment window opens up, prompting you for the title, date, time, and any notes. The same is true for new email messages, new contacts, and so on.

Ribbons and tabs

Outlook features a strip of graphical buttons across the top called the Ribbon. See Figure I-2. You can find out what each button does by hovering the mouse pointer over it so a pop-up ScreenTip appears.

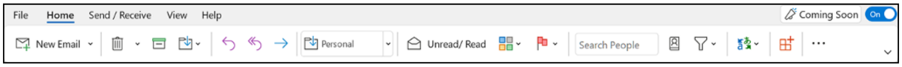
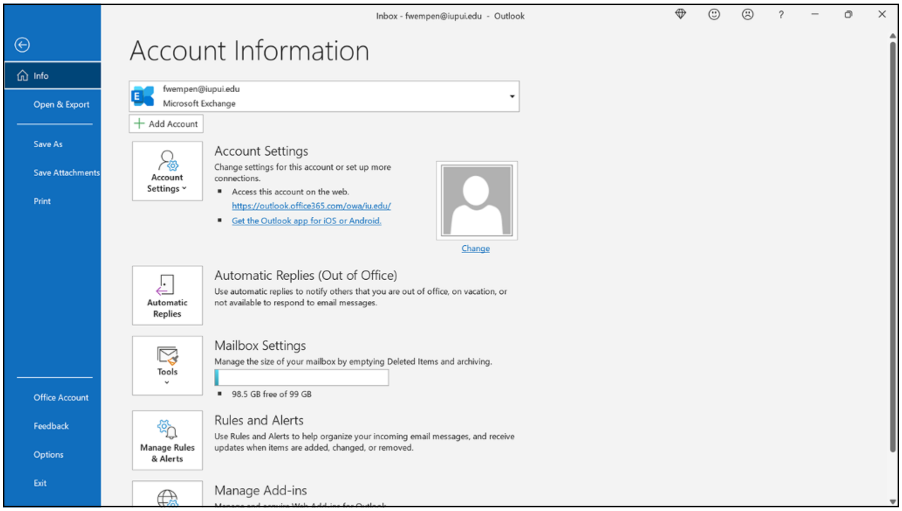


FIGURE I-2: The Home tab of the Ribbon in Outlook.

The Ribbon is a multi-tabbed affair, and the tab names appear as a row of text above the Ribbon: Home, View, and so on. You start out on the Home tab, but you can click one of the other tabs to switch to it any time.

There's one special tab: File. This tab opens a whole different screen, called Backstage view. This screen lets you open and export data files, set program options, print, and perform maintenance-type functions like setting up rules, managing add-ins, and setting program options. See Figure I-3.


Inbox - fwempen@iupui.edu - Outlook
Info
Open & Export
Save As
Save Attachments
Print
Office Account
Feedback
Options
Exit
Account Information
Add Account
Account Settings
Change
Automatic Replies
Tools
Manage Rules & Alerts

fwempen@iupui.edu
Microsoft Exchange

Account Settings
Change settings for this account or set up more connections.

- Access this account on the web.
  https://outlook.office365.com/owa/iu.edu/
- Get the Outlook app for iOS or Android.

Automatic Replies (Out of Office)
Use automatic replies to notify others that you are out of office, on vacation, or not available to respond to email messages.

Mailbox Settings
Manage the size of your mailbox by emptying Deleted Items and archiving.

- 98.5 GB free of 99 GB

Rules and Alerts
Use Rules and Alerts to help organize your incoming email messages, and receive updates when items are added, changed, or removed.

Manage Add-ins

FIGURE I-3: Backstage View in Outlook.

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 the keyboard equivalents on the various Ribbon tabs and commands, and then press that key to make your selection. (This is way too much trouble for most people, but maybe you love a challenge).

Another fast way to get at your favorite Outlook features is the Quick Access Toolbar — a small strip of icons in the upper left corner of your screen. In Chapter 14, I describe how that works and how to make it do what you want.

Icons Used in This Book

Keep an eye out for the following icons sprinkled throughout the chapters — these little pictures draw your attention to specific types of useful information:

WARNING

The Warning icon points to something that can prevent or cause problems — good stuff to know!

REMEMBER

The Remember icon offers 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 identifies background information that casual users can skip, although it may make for good conversation at a really dull party.

Beyond the Book

In addition to the material in the print or ebook you're reading right now, this product comes with some goodies on the web that you can access anywhere. No matter how well you understand the concepts of Outlook, you'll likely come across a few questions where you don't have a clue. To get this material, simply go to `www.dummies.com` and search for "Outlook For Dummies Office 2021 Edition Cheat Sheet" in the Search box.

1

Getting Started with Outlook

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

- » Exploring what you can do with Outlook
- » Switching to the Simplified Ribbon
- » Reading and creating email
- » Sending files by email
- » Checking your calendar
- » Entering appointments and contacts
- » Managing tasks
- » Keeping notes

Chapter 1

A First Look at Outlook

This book kicks off 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 there's more here than meets the eye; Outlook does ordinary things extraordinarily well.

Most people use only about 5 percent of Outlook's power. (Hey, that's kind of like how people only use a small percentage of their brains!) Even if you move up to using 10 percent of Outlook's features, you'll be amazed at how this application can streamline your life and spiff up your communications.

Why Outlook?

Millions of people use Outlook because millions of people use Outlook. That sounds redundant, but it's the truth. People choose Outlook not only because it has great features, but also because so many other people have already chosen it. Outlook is the standard tool for communicating, collaborating, and organizing for millions of people around the world.

Why does popularity matter? It's mainly a matter of standardization. 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 (Almost) Anything with a Few Clicks

Well, okay, maybe it takes more than a few clicks for the complicated stuff. (More on that complicated stuff in later chapters.) But a lot of what you will do every day in Outlook is super simple.

Here's the skinny on the basic things that you probably want to do first:

- **Open an item and read it:** Double-click the item. It opens in a new window. If you single-click it, it displays in a preview pane (not in a new window).
- **Create a new item:** Click the New button on the Ribbon at the top of the screen and fill out the form that appears. (The New button will have a more specific name depending on the module you're working with. For example, in the Mail module, the button is called New Email.) When you're done, click the Send button or the Save & Close button, depending on the type of item.
- **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. You can also press the Delete key on your keyboard, or right-click the item and choose Delete.
- **Move an item:** Use your mouse to drag the item to where you want it, such as to a different folder for storage.

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.