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- Secure your information and handle junk mail and spam
- Keep track of your calendar and organize your contacts
- Assign tasks and collaborate with other Outlook users

Bill Dyszel

Author of all previous editions of
Outlook For Dummies

Outlook 2016 For Dummies

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Outlook 2016 For Dummies

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by Bill Dyszel

Author of 20 books, a regular contributor to national technology publications, and a popular keynote speaker

For Dummies
A Wiley Brand

Outlook 2016 For Dummies®

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Contents at a Glance

Introduction 1

Part I: Getting Started With Outlook 2016 9

Chapter 1: Outlook Features You Really Need to Know 11
Chapter 2: Inside Outlook: Getting More Done With Less Effort 23
Chapter 3: On the Fast Track: Drag 'Til You Drop 37

Part II: Taming the Email Beast 49

Chapter 4: The Essential Secrets of Email 51
Chapter 5: Email Tools You Can't Do Without 71
Chapter 6: Conquering Your Mountain of Messages 87

Part III: Managing Contacts, Dates, Tasks, and More 125

Chapter 7: Your Little Black Book: Creating Contacts Lists 127
Chapter 8: Unleashing the Calendar's Power 149
Chapter 9: Task Mastery: Discovering All the Bells and Whistles 169
Chapter 10: Seeing It Your Way: Customizing Outlook 189

Part IV: Beyond the Basics: Tips and Tricks You Won't Want to Miss 207

Chapter 11: Social Media Magic With Outlook RSS 209
Chapter 12: Powering Your Home Office With Outlook 219
Chapter 13: Merging Mail From Outlook to Microsoft Word 227

Part V: Outlook at Work 237

Chapter 14: Big-Time Collaboration With Outlook 239
Chapter 15: Outlook for the iPad and Android Phones 263
Chapter 16: Telecommuting With Outlook.com and the Outlook Web App 275

Part VI: The Part of Tens 295

Chapter 17: Ten Shortcuts Worth Taking 297
Chapter 18: Ten Accessories for Outlook 303
Chapter 19: Ten Things You Can't Do With Outlook 307
Chapter 20: Ten Things You Can Do After You're Comfy 313

Index 319

Table of Contents

Introduction *1*

About This Book 2
Foolish Assumptions 2
How This Book Is Organized 3
    Part I: Getting Started With Outlook 2016 3
    Part II: Taming the Email Beast 3
    Part III: Managing Contacts, Dates, Tasks, and More 4
    Part IV: Beyond the Basics: Tips and Tricks You Won't Want to Miss 4
    Part V: Outlook at Work 5
    Part VI: The Part of Tens 5
Conventions Used in This Book 5
    Dialog boxes 5
    Ribbons and tabs 6
    Keyboard shortcuts 6
Icons Used in This Book 7

Part I: Getting Started With Outlook 2016 .... *9*

Chapter 1: Outlook Features You Really Need to Know 11

Explaining Why So Many People Use Outlook 11
Doing Anything in Outlook the Easy Way 12
Using Email: Basic Delivery Techniques 13
    Reading email 13
    Answering email 14
    Creating new email messages 15
Sending a File 16
Maintaining Your Calendar 17
    Entering an appointment 17
    Managing your schedule 18
Adding a Contact 18
Entering a Task 19
Taking Notes 21

Chapter 2: Inside Outlook: Getting More Done With Less Effort 23

Outlook and Other Programs 23
There's No Place Like Home: Outlook's Main Screen 25
    Looking at modules 26

- Using the Folder pane 27
- The Information Viewer: Outlook's hotspot 27
- Navigating folders 29

Tying It All Together: The Ribbon 29
- Viewing ScreenTips 30
- Using the New Items button 31

Finding Things in a Flash With Instant Search 31
Taking Peeks 34
Getting Help in Outlook 34

Chapter 3: On the Fast Track: Drag 'Til You Drop 37

Dragging 37
Dispatching Tasks in a Flash 39
Making Time Stand Still With Calendar Wizardry 41
Keeping Friends Close and Enemies Closer 43
Creating Instant Email Messages 45
- Creating email from a name in your Contacts list 45
- Creating an email from an appointment 46

Expanding Your Outlook Workspace 47
Zen of the Right Button 48

Part II: Taming the Email Beast.................................. 49

Chapter 4: The Essential Secrets of Email 51

Front Ends and Back Ends 51
Creating Messages 52
- The quick-and-dirty way 52
- The slow but complete way 52
- Setting priorities 55
- Setting sensitivity 57
- Setting other message options 58
- Adding an Internet link to an email message 58

Reading and Replying to Email Messages 59
- Viewing previews of message text 60
- Sending a reply 62
- Resending messages 63
- Don't get caught by phishing 64

That's Not My Department: Forwarding Email 64
Blind Copying for Privacy 66
Deleting Messages 67
Saving Interrupted Messages 67
Saving a Message as a File 68

Chapter 5: Email Tools You Can’t Do Without 71

Nagging by Flagging....................71
    One-click flagging....................72
    Setting flags for different days....................72
    Changing the default flag date....................73
    Adding a flag with a customized reminder....................74
    Changing the date on a reminder....................75
Saving Copies of Your Messages....................76
Setting Your Reply and Forward Options....................77
Adding Comments to a Reply or a Forward....................78
Sending Attachments....................80
Emailing Screenshots....................82
Creating Signatures for Your Messages....................83

Chapter 6: Conquering Your Mountain of Messages 87

Organizing Folders....................88
    Creating a new mail folder....................88
    Moving messages to another folder....................89
Organizing Your Email With Search Folders....................90
    Setting up a search folder....................90
    Using a search folder....................92
    Deleting a search folder....................93
Using the Reading Pane....................93
Playing by the Rules....................94
    Creating a rule....................94
    Running a rule....................97
Filtering Junk Email....................98
    Fine-tuning the filter’s sensitivity....................98
    Filtering your email with sender and recipient lists....................100
    Filtering domains....................102
Archiving for Posterity....................103
    Setting up AutoArchive....................103
    Setting AutoArchive for individual folders....................105
    Starting the archive process manually....................107
    Finding and viewing archived items....................108
    Closing the archive data file....................109
Arranging Your Messages....................110
    Viewing conversations....................113
    Ignoring conversations....................114
    Cleaning up conversations....................114
Simplifying Tasks Using Quick Steps....................117
    Creating and managing Quick Steps....................120
    Creating Quick Parts to save keystrokes....................123

Part III: Managing Contacts, Dates, Tasks, and More 125

Chapter 7: Your Little Black Book: Creating Contacts Lists........127

Putting in Your Contacts: Names, Numbers, and Other Stuff................128
    The quick-and-dirty way to enter contacts..................................128
    The slow, complete way to enter contacts....................................128
Viewing Your Contacts 134
    Sorting a view 135
    Rearranging views..136
    Using grouped views 138
Flagging Your Friends 139
Using Contact Information 140
    Searching contacts in the Contacts module..................................140
    Finding a contact from any Outlook module.................................142
    Forwarding a business card 143
Gathering People Into Groups 144
    Creating a Contact group...145
    Editing a Contact group 146
    Using a Contact group...146
    Adding pictures to contacts 147

Chapter 8: Unleashing the Calendar's Power...................149

Getting Around the Outlook Calendar 149
Meetings Galore: Scheduling Appointments 151
    The quick-and-dirty way to enter an appointment.........................152
    The complete way to enter an appointment.................................152
    Not this time: Changing dates 155
    Not ever: Breaking dates..158
    We've got to keep seeing each other: Recurring dates...................158
Getting a Good View of Your Calendar 161
Printing Your Appointments 164
Adding Holidays...165
Handling Multiple Calendars...166
    Creating multiple calendars 166
    Managing multiple calendars 167

Chapter 9: Task Mastery: Discovering All the Bells and Whistles...169

Entering New Tasks in the Tasks Module.......................................170
    The quick-and-dirty way to enter a task......................................170
    The regular way to enter a task 170
    Adding an Internet link to a task...173
Editing Your Tasks 173
    The quick-and-dirty way to change a task....................................174
    The regular way to change a task..175
    Deleting a task 178

Managing Recurring Tasks 178
    Creating a regenerating task.. 180
    Skipping a recurring task once.. 181
Marking Tasks as Complete 181
    Marking it off 182
    Picking a color for completed or overdue tasks.. 183
Viewing Your Tasks.. 184
Frequenting the To-Do Bar 185
    Adding a new item to the To-Do bar.. 186
Tasks in the Calendar.. 186

Chapter 10: Seeing It Your Way: Customizing Outlook 189

Customizing the Quick Access Toolbar.. 190
Customizing the Ribbon 191
Enjoying the Views 192
    Table/List view.. 193
    Card view 194
    Calendar views 195
Playing With Columns in Table/List View 195
    Adding a column 196
    Moving a column.. 197
    Widening or narrowing a column 198
    Removing a column 198
Sorting Items 199
    Sorting from the Table view 200
    Sorting from the Sort dialog box.. 200
Grouping Items 201
    Viewing grouped items.. 201
    Viewing headings only 202
Saving Custom Views 203
Using Categories 203
    Assigning a category.. 204
    Renaming a category 205
    Changing a category color 205
    Assigning a category shortcut key 206

Part IV: Beyond the Basics: Tips and Tricks You Won't Want to Miss.. 207

Chapter 11: Social Media Magic With Outlook RSS 209

Brushing Up on Social Media Basics.. 209
    Sending an SOS for RSS 210
    Feeling like a social butterfly.. 211
Subscribing to a Blog in Outlook.. 212
Subscribing to Podcasts via Outlook.. 213
Reading Feeds 216

Chapter 12: Powering Your Home Office With Outlook. 219
Investigating an ISP 219
Picking a Provider 220
Setting Up Internet Email Accounts 221
Dealing With Multiple Email Accounts 224

Chapter 13: Merging Mail From Outlook to Microsoft Word 227
Conjuring Mailing Label Magic 228
    Urging to merge 228
    Making and using a merge template 232
Form Letter Formalities 232
Merging From Selected Contacts 233
You'll Still Have to Lick It: Printing Envelopes 233
Merging to Email 234

Part V: Outlook at Work 237

Chapter 14: Big-Time Collaboration With Outlook. 239
Collaborating With Outlook's Help 240
    Organizing a meeting 240
    Responding to a meeting request 243
    Checking responses to your meeting request 244
    Taking a vote 245
    Tallying votes 246
    Assigning tasks 247
    Sending a status report 248
Collaborating With Outlook and Exchange 249
    Giving delegate permissions 250
    Opening someone else's folder 251
Viewing Two Calendars Side by Side 253
    Setting access permissions 254
    Viewing two accounts 256
Managing Your Out of Office Message 258
About Address Books 259
Scheduling a Skype Meeting 261
    Setting up a Skype meeting 261
    Joining a Skype meeting 262

Chapter 15: Outlook for the iPad and Android Phones 263
Understanding the Mobile Difference 264
Accessing Mobile Email 264
    Reading email 265
    Replying to email 265
    Composing email 267

Archiving, scheduling, and deleting email messages....................268
Deleting messages 270
Managing groups of messages 270
Using Your Mobile Calendar 271
Navigating the mobile calendar 272
Creating a new appointment 272

Chapter 16: Telecommuting With Outlook.com and the Outlook Web App. 275

Exploring Outlook.com 275
Getting Caught Up on Web Email Basics 277
Reading messages...277
Sending a message..278
Flagging messages 279
Setting individual message options..280
Organizing Contacts 281
Viewing your contacts...281
Adding contacts 282
Using Your Calendar 283
Entering an appointment 284
Moving an appointment 285
Viewing your calendar 286
Using Mobile Collaboration..286
Inviting attendees to a meeting...286
Responding to a meeting request 288
Exploring Your Options 289
Automated vacation replies/out of office message 289
Creating a signature..290
Understanding Outlook Web App...291
Knowing when it’s handy...292
Logging on and off 292

Part VI: The Part of Tens.. 295

Chapter 17: Ten Shortcuts Worth Taking 297

Using the New Items Tool..297
Sending a File to an Email Recipient 298
Sending a File From a Microsoft Office Application...............................299
Turning a Message Into a Meeting..300
Finding Something...300
Undoing Your Mistakes...300
Using the Go to Date Command...300
Adding Items to List Views 301
Sending Repeat Messages..301
Resending a Message 302

Chapter 18: Ten Accessories for Outlook 303

Smartphones 303
A Tablet Computer 304
For Dummies E-Learning...304
Microsoft Office 304
A Business-Card Scanner..304
Online Backup..305
Skype 305
Microsoft SharePoint 305
Microsoft Exchange...305
OneDrive...306

Chapter 19: Ten Things You Can't Do With Outlook. 307

Create a Unified Inbox on the Desktop 308
Insert a Phone Number Into Your Calendar....................................308
Open a Message From the Reading Pane..308
Perform Two-Sided Printing..308
Search and Replace Area Codes 309
Print a List of Meeting Attendees 309
Enlarge the Type in the Calendar Location Box.............................309
Create Contact Records for All Recipients of an Email 309
Track Time Zones for Meetings 310
Back Up Outlook Data..310
Ten More Things Outlook Can't Do for You....................................311

Chapter 20: Ten Things You Can Do After You're Comfy. 313

Taking Notes 313
Customizing the Quick Access Toolbar...314
Wising Up Your Messages With Smart Art 315
Translating Your Email Messages 315
Adding Charts for Impact 315
Using Symbols in Email..316
Opening Multiple Calendars..316
Superimposing Calendars..317
Selecting Dates as a Group 317
Pinning a Contact Card 317

Index... 319

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.

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 brushup 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 2016 For Dummies* (both 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.

How This Book Is Organized

To make it easier to find out how to do what you want to do, this book is divided into parts. Each part covers a different aspect of using Outlook. Because you can use similar methods to do many different jobs with Outlook, the first parts of this book focus on *how* to use Outlook. The later parts concentrate on *what* you can use Outlook to do.

Part I: Getting Started With Outlook 2016

I learn best by doing, so the first chapter is a quick guide to the things that most people do with Outlook on a typical day. You find out how to use Outlook for such routine tasks as handling messages, notes, and appointments. You can get quite a lot of mileage out of Outlook, even if you only check out the things I describe in the first chapter.

Because Outlook allows you to use similar methods to do many things, I go on to show you the things that stay pretty much the same throughout the program: how to create new items from old ones by using drag and drop; ways to view items that make your information easy to understand at a glance; and the features Outlook offers to make it easier to move, copy, and organize your files.

Part II: Taming the Email Beast

Email is now the most popular function of computers. Tens of millions of people are hooked up to the Internet or an office network. The problem is that email can still be a little too complicated. As I show you in Part II, however, Outlook makes email easier. Computers are notoriously finicky about the exact spelling of addresses, correctly connecting to the actual mail service, and making sure the text and formatting of the message fit the software you're using. Outlook keeps track of the details involved in getting your message to its destination.

Outlook also allows you to receive email from a variety of sources and manage those messages in one place. You can slice and dice your list of incoming and outgoing email messages to help you keep track of what you send, to whom you send it, and the day and time you send it.

Part III: Managing Contacts, Dates, Tasks, and More

Outlook takes advantage of its special relationship with your computer and your office applications (Microsoft Outlook with Microsoft Office, Microsoft Internet Explorer, and Microsoft Windows — notice a pattern?) to tie your office tasks together more cleanly than other such programs and to make it easier to deal with all the stuff you have to do. The chapters in Part III show you how to get the job done with Outlook.

In addition to planning and scheduling, you probably spend lots of time working with other people. You need to coordinate your tasks and schedules with theirs (unless you make your living doing something weird and antisocial, such as digging graves or writing computer books). Outlook allows you to share calendar and task information with other people and also keep detailed information about the people with whom you collaborate. You can also assign tasks to other people if you don't want to do those tasks yourself. (Now . . . *there's* a time-saver.) Be careful though — other people can assign those tasks right back to you.

Outlook has parts that many people never discover. Some of those parts are obscure but powerful — and others aren't part of Outlook at all (technically speaking). Maybe you want to know how to do such things as create custom forms and set up Outlook to get email from the Internet. If you use Outlook at home or in your own business or if you just want to soup up your copy of Outlook for high-performance work, you'll find useful tips in Part III.

Part IV: Beyond the Basics: Tips and Tricks You Won't Want to Miss

Some parts of Outlook are less famous than others but no less useful. Part IV guides you through the sections of Outlook that the real power users exploit to stay ahead of the pack. You may want to understand how to make Outlook connect with social media, set up your home office, or take some first steps in email marketing. You'll get that in Part IV.

Part V: Outlook at Work

Big organizations have different requirements than small businesses. Many large companies rely heavily on Outlook as a tool for improved teamwork and project management. Part V shows you the parts of Outlook that work best in the big leagues (or for people with big ambitions). You'll get all the information you need to collaborate using Office 365 and Microsoft Exchange, beef up your security, customize the way Outlook looks and works, and check your Outlook account when you're not in the office by using Outlook Web Access or your favorite mobile device.

Part VI: The Part of Tens

Why ten? Why not! If you must have a reason, ten is the highest number you can count to without taking off your shoes. A program as broad as Outlook leaves a great deal of flotsam and jetsam that doesn't quite fit into any category, so I sum up the best of that material in groups of ten.

Conventions Used in This Book

Outlook has many unique features, but it also has lots in common with other Windows programs: dialog boxes, pull-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:

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

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

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

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

Part I

Getting Started With Outlook 2016

getting started
with
Outlook
2016

For more on Outlook 2016, please visit `www.dummies.com/cheatsheet/outlook2016`.

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.

Chapter 1

Outlook Features You Really Need to Know

In This Chapter

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

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.

What's new about Microsoft Outlook 2016

The most important news about Outlook 2016 doesn't concern what's in it but how you buy it. Microsoft has gone whole hog with a new 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, which gives you the right to 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. For the moment, you can still buy Outlook the old-fashioned way, but Microsoft has made it very clear that in the future, they expect everyone to rent, not buy.

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 an icon to do something, to view something, or to complete something.

TIP

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.
- **Create a new item:** Click an 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, alternatively, click the Save and Close buttons.
- **Delete an item:** Click the item once to select it and then click the Delete icon on the Ribbon at the top of the screen. The Delete icon 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.

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.

The figures you see in this book and the instructions you read assume you're using Outlook 2016 the way it comes out of the box from Microsoft — 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 leftmost 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 to see the whole thing.

To see an entire message, follow these steps:

1. **Click the Mail button in the Navigation bar.**

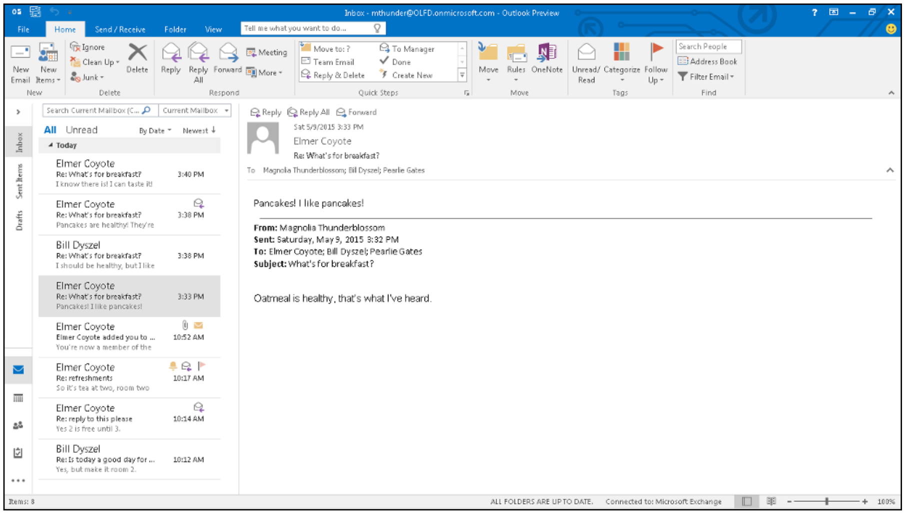
   You don't need this step if you can already see your messages.

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

   Now you can see the entire message.

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

   The message form closes.


Inbox - mthunder@OLFD.onmicrosoft.com - Outlook Preview
File
Home
Send / Receive
Folder
View
Tell me what you want to do...
New Email
New Items
New
Ignore
Clean Up
Junk
Delete
Delete
Reply
Reply All
Forward
Meeting
More
Respond
Move to: ?
Team Email
Reply & Delete
To Manager
Done
Create New
Quick Steps
Move
Rules
OneNote
Move
Unread/ Read
Categorize
Follow Up
Tags
Search People
Address Book
Filter Email
Find
Inbox
Sent Items
Drafts
Search Current Mailbox (C...
Current Mailbox
All
Unread
By Date
Newest
Today
Reply
Reply All
Forward
Items: 8
ALL FOLDERS ARE UP TO DATE.
Connected to: Microsoft Exchange
100%

Elmer Coyote
Re: What's for breakfast? 3:40 PM
I know there is! I can taste it!

Elmer Coyote
Re: What's for breakfast? 3:38 PM
Pancakes are healthy! They're

Bill Dyszel
Re: What's for breakfast? 3:38 PM
I should be healthy, but I like

Elmer Coyote
Re: What's for breakfast? 3:33 PM
Pancakes! I like pancakes!

Elmer Coyote
Elmer Coyote added you to ... 10:52 AM
You're now a member of the

Elmer Coyote
Re: refreshments 10:17 AM
So it's tea at two, room two

Elmer Coyote
Re: reply to this please 10:14 AM
Yes 2 is free until 3.

Bill Dyszel
Re: Is today a good day for ... 10:12 AM
Yes, but make it room 2.

Sat 5/9/2015 3:33 PM
Elmer Coyote
Re: What's for breakfast?
To Magnolia Thunderblossom; Bill Dyszel; Pearlie Gates

Pancakes! I like pancakes!

From: Magnolia Thunderblossom
Sent: Saturday, May 9, 2015 3:32 PM
To: Elmer Coyote; Bill Dyszel; Pearlie Gates
Subject: What's for breakfast?

Oatmeal is healthy, that's what I've heard.

Figure 1-1: Double-click the message you want to read.

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. **Click the Reply button.**
2. **Type your response.**
3. **Click the Send button.**