



Outlook basics

Outlook is a powerful tool for managing your e-mail, contacts, calendars, and tasks. To use it most effectively, you first have to understand the basics. This tutorial introduces some of the tasks and features that you will use most often.

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Before you begin

What you'll learn

After completing this tutorial, you'll be able to:

- Set up an e-mail account.
- Identify user interface elements that you can use to accomplish basic tasks.
- Add a contact to your address book.
- Compose and send e-mail messages.
- Organize your folders and inbox.
- Create a calendar event.

Requirements


- Outlook for Mac 2011
- E-mail account information (for example, your e-mail address, password, and mail server addresses). For a personal account, you can obtain this information from your Internet service provider. For a corporate account, contact your network administrator.

Estimated time to complete:  20 minutes

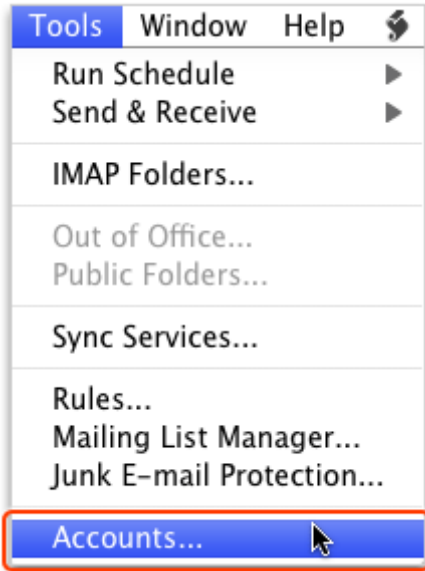
1. Add a new e-mail account

You can use Outlook to manage multiple e-mail accounts, including Microsoft Exchange, POP, IMAP, and Windows Live accounts. Before you can send and receive e-mail messages, you first have to set up an e-mail account.

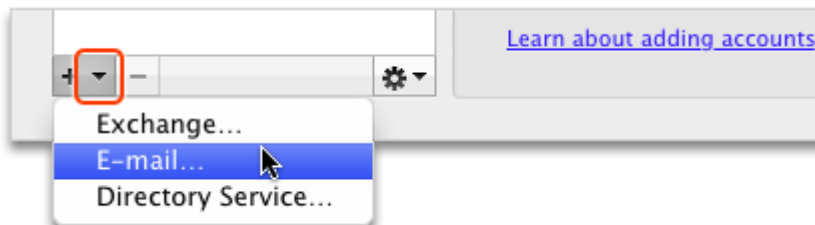
Let's set up your e-mail account.


 **Note** To complete this procedure, you must have your e-mail account and server information. If you have already set up your e-mail account, you can skip this procedure.

- 1 On the **Tools** menu, click **Accounts** (also written as **Tools > Accounts** in this tutorial).



- 2 On the **Add an account** pop-up menu, click **E-mail**.



 **Tip** If your account is located on an Exchange server, click **Exchange**.

- 3 Enter your e-mail address and password, and then click **Add Account**.

Enter your account information.

E-mail address: erikr@adventure-works.com

Password:

Configure automatically

Cancel Add Account

Note If Outlook recognizes your e-mail provider (for example, Windows Live Hotmail), the **Configure automatically** check box remains selected, and Outlook attempts to configure your server information automatically. To enter the server information manually, clear the **Configure automatically** check box.

- 4 Verify your account personal information and server information, and then close the **Accounts** dialog box.

Accounts

Show All

Default Account
Adventure Works
erikr@adventure-works.com

Adventure Works
POP Account

Account description: Adventure Works

Personal information

Full name: Erik Rucker

E-mail address: erikr@adventure-works.com

Server information

User name: erikr@adventure-works.com

Password:

Incoming server: pop.adventure-works.com : 995

Override default port

Use SSL to connect (recommended)

Always use secure password

Outgoing server: smtp.adventure-works.com : 587

Override default port

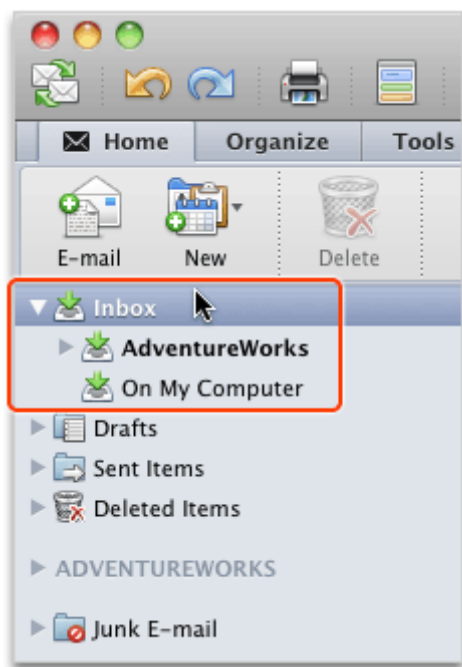
Use SSL to connect (recommended)


More Options...

[Learn about POP account settings](#)

Advanced...

- 5 Notice that a folder appears for your e-mail account in the folder list.



 **Note** A number of factors (for example, the number of messages to download, or the current server traffic) can influence how long it takes for a new e-mail account to appear in the folder list. If you have trouble setting up your account, see "About adding accounts".

Hints

- For more information about the different types of e-mail accounts that Outlook supports, see "Add an e-mail account".
- For more information about the different folders that appear under Inbox, see "About On My Computer folders".
- To view and manage other Outlook preferences, click **Outlook > Preferences**.

Before you move on

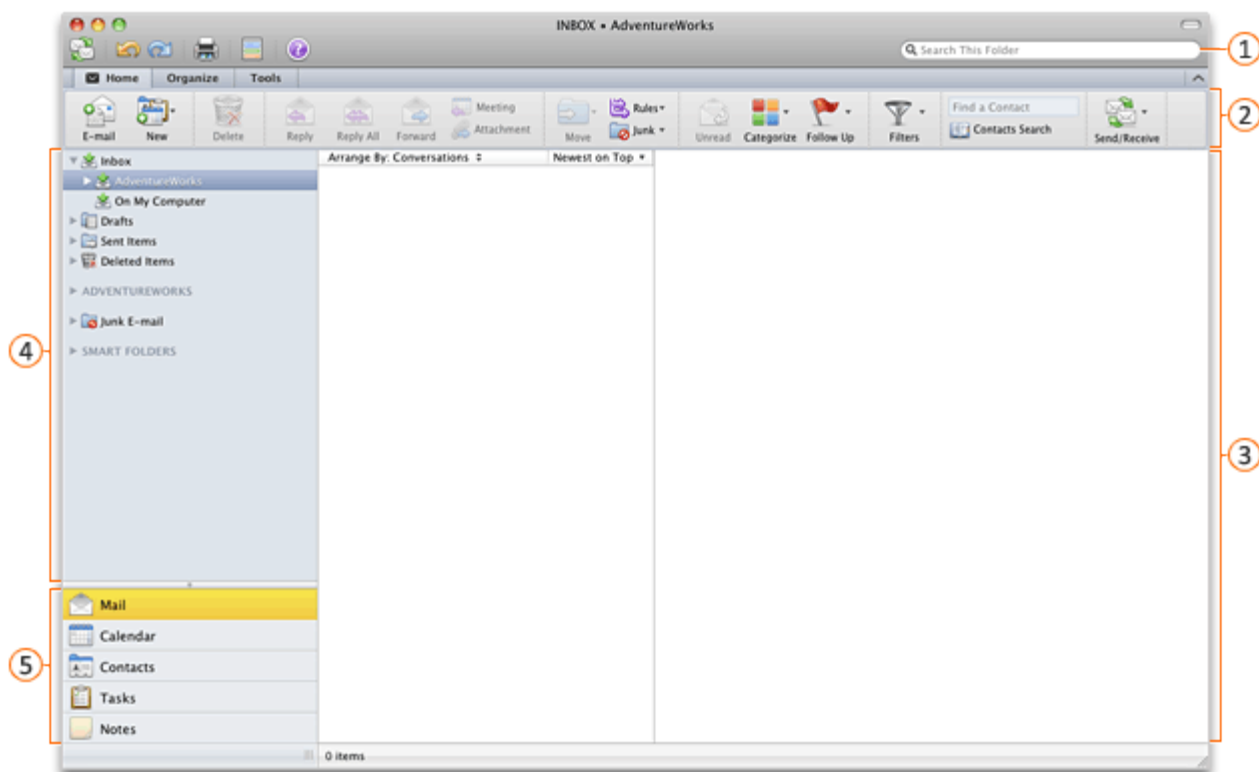
Make sure that you can do the following:

- Add an e-mail account, and verify that it appears in the folder list.

2. Explore the Outlook user interface



Before you begin to use the e-mail account that you set up, you should familiarize yourself with some of the user interface elements in Outlook.

Let's explore the Outlook user interface.



- 1 **Search box:** A way to find items in the current folder. As you type keywords into the search box, the Search tab appears on the ribbon and provides additional search options (for example, the option to expand the search to All Items).
- 2 **Ribbon:** The tabbed command bar at the top of a window or work area that organizes features into logical groups. The current view (for example, mail, calendar, or contacts view) determines which options appear on the ribbon.
- 3 **Reading pane:** The area where you can read e-mail messages or see details about items such as contacts and tasks. To change the location of the reading pane, on the **View** menu, point to **Reading Pane**, and then select an option (for example, **Below**).
- 4 **Navigation pane:** In mail view, the navigation pane displays the folder list. In calendar, contacts, tasks, and notes views, the navigation pane lets you show and hide items in categories. If you don't see the navigation pane, click **View > Navigation Pane**.
- 5 **View switcher:** Buttons to switch between the five main Outlook views — mail, calendar, contacts, tasks, and notes.

Hints

- To resize the navigation pane or the reading pane, point to the border between the panes. When the pointer becomes , drag to change the width.
- To hide the ribbon while you work, on the right side of the ribbon, click .

Before you move on

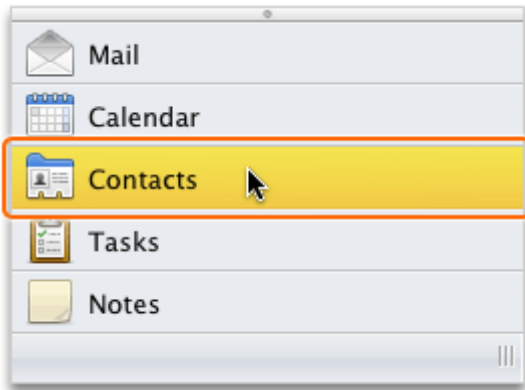
Make sure that you can do the following: Identify the Outlook user interface elements listed above.

3. Add a contact

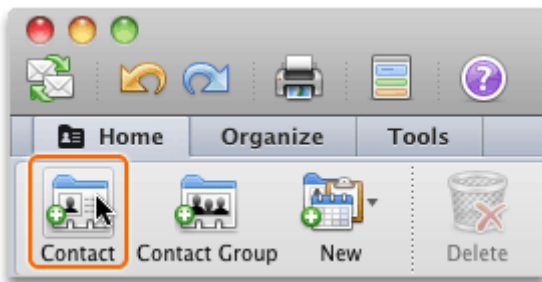
You can use the Address Book to manage both professional and personal information for all contacts. After a contact is in your address book, you can use it across Outlook. For example, you can send an e-mail message or a meeting invitation without having to remember the person's e-mail address.

Let's add a contact to the Address Book.

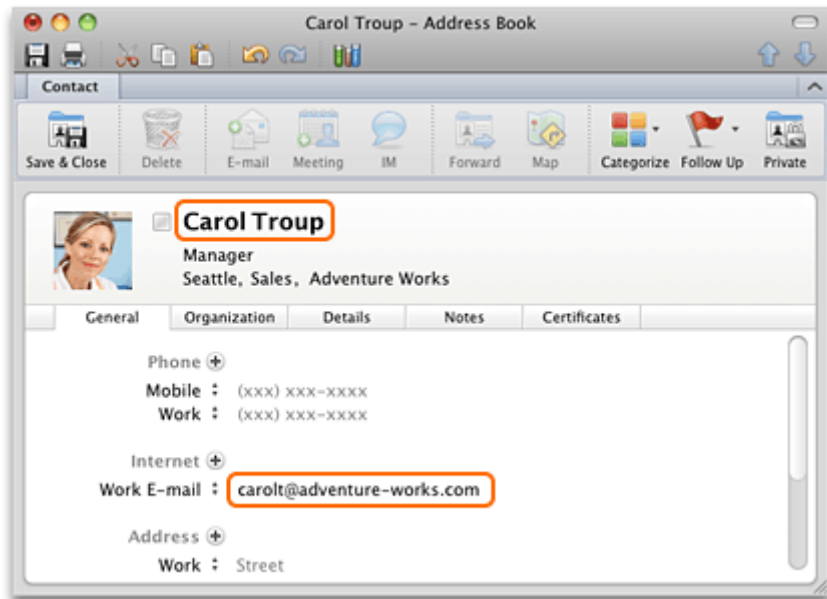
- 1 On the view switcher, click **Contacts**.




- 2 On the **Home** tab, click **Contact**.

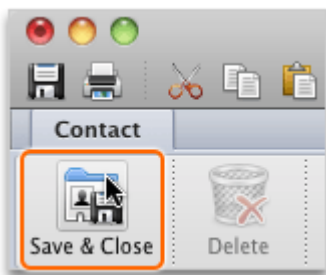


- 3 Enter information for the contact. At a minimum, include the contact's name and e-mail address.

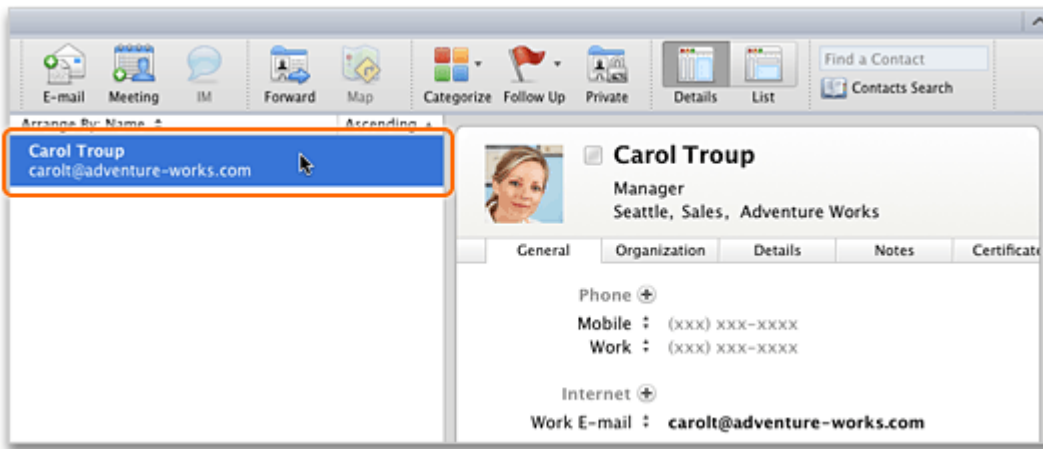


 **Tip** To add a picture for the contact, double-click the placeholder thumbnail that appears in the contact window.

- 4 On the **Contact** tab, click **Save & Close**.



- 5 Notice that the contact appears in the contact list.



Hints

- To add a group of contacts (for example, the members of a book club) so that you can send e-mail to all members of the group at once, on the **Home** tab, click **New**, and then click **Contact Group**.
- Once you add a picture for a contact, all e-mail messages that you receive from that person will include the picture.
- To remove a contact's picture, double-click the picture thumbnail, drag the picture out of the box, and then click **Set**.

Before you move on

Make sure that you can do the following:

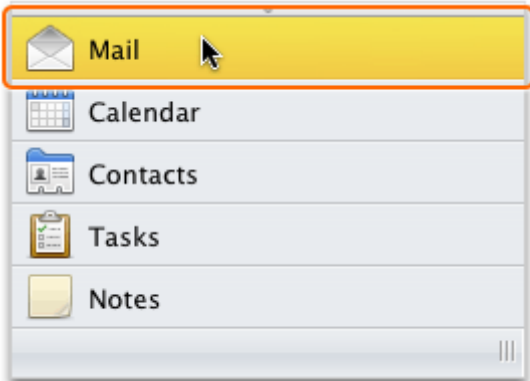
- Add a contact to the Address Book.

4. Compose and send an e-mail message

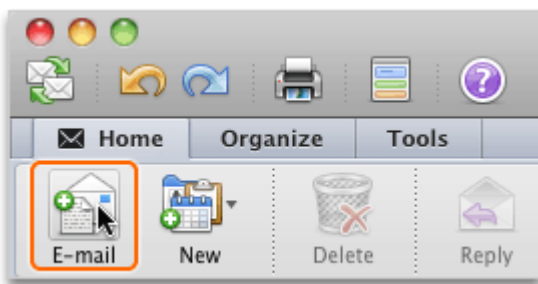
E-mail messages are the most common way that people communicate online. You can compose and send messages to any contact in your address book or to anyone whose e-mail address you know.

Let's compose a message to the contact that you added in the previous lesson.

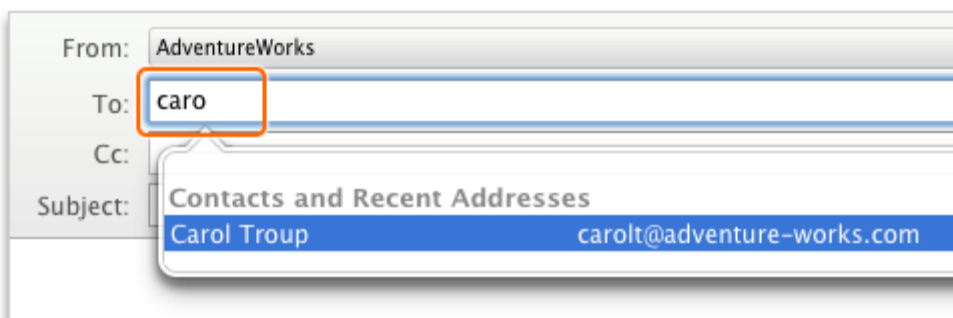
- 1 On the view switcher, click **Mail**.



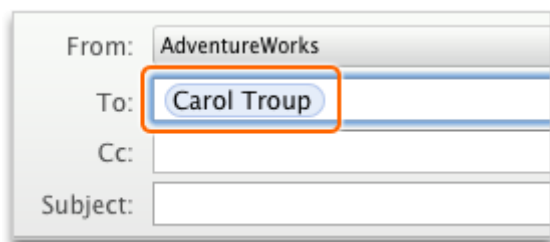
- 2 On the **Home** tab, click **E-mail**.




- 3 In the **To** box, begin typing the name of the contact that you added earlier. Possible matches appear in the **Contacts and Recent Addresses** list.



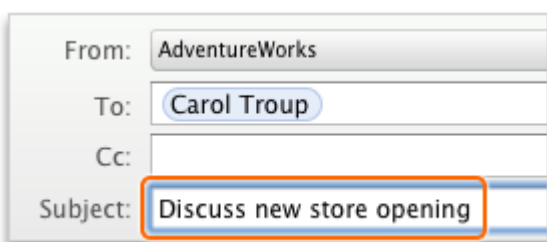
- 4 Press RETURN. The contact is added to the **To** box.



A screenshot of the Outlook 'To' field. The 'From' field contains 'AdventureWorks'. The 'To' field contains 'Carol Troup', which is highlighted with a blue selection bar and an orange rectangular box. The 'Cc' and 'Subject' fields are empty.

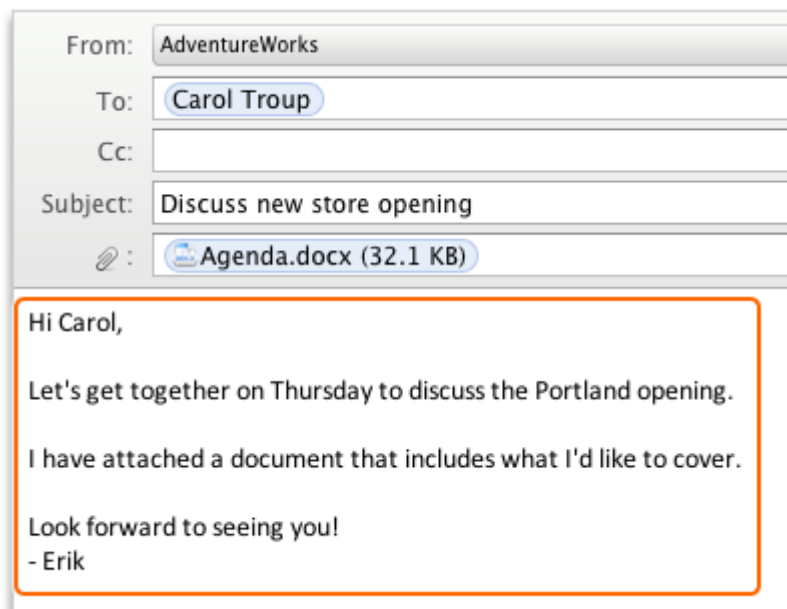
 **Tip** To delete a contact from the **To** box, click the contact name, and then press DELETE.

- 5 In the **Subject** box, type a subject, and then press TAB. The subject of the message appears above the message toolbar.




A screenshot of the Outlook 'Subject' field. The 'From' field contains 'AdventureWorks'. The 'To' field contains 'Carol Troup'. The 'Subject' field contains 'Discuss new store opening', which is highlighted with a blue selection bar and an orange rectangular box. The 'Cc' field is empty.

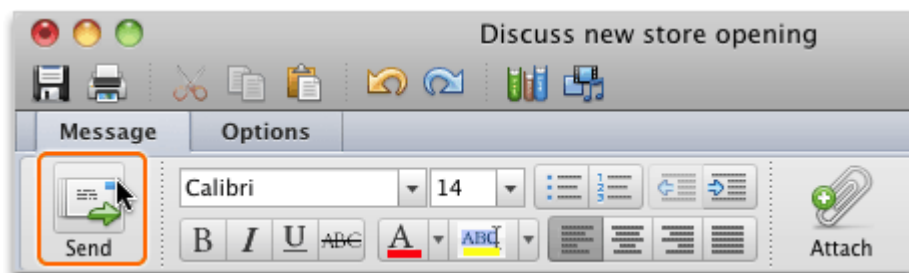
- 6 In the message window, type the text of the message.




A screenshot of the Outlook message body. The 'From' field contains 'AdventureWorks'. The 'To' field contains 'Carol Troup'. The 'Cc' field is empty. The 'Subject' field contains 'Discuss new store opening'. Below the subject field, there is an attachment icon and the text 'Agenda.docx (32.1 KB)'. The message body contains the following text: 'Hi Carol, Let's get together on Thursday to discuss the Portland opening. I have attached a document that includes what I'd like to cover. Look forward to seeing you! - Erik'. The entire message body is enclosed in an orange rectangular box.

 **Tip** To send a file (for example, a Word document) with the message, on the **Message** tab, click **Attach**, and then select the file that you want to include.

- 7 On the **Message** tab, click **Send**.



 **Tip** When you send a message, if you are connected to the Internet, your message is sent immediately. If you are having trouble sending messages, on the **Outlook** menu, make sure that a check mark does not appear next to **Work Offline**.

Hints

- A copy of each message that you send appears in the **Sent Items** folder in the folder list.
- To check spelling in the message, on the **Options** tab, click **Spelling**.
- To change the default font used in e-mail messages, click **Outlook > Preferences**. Then, under **Personal Settings**, click **Fonts**.

Before you move on

Make sure that you can do the following:

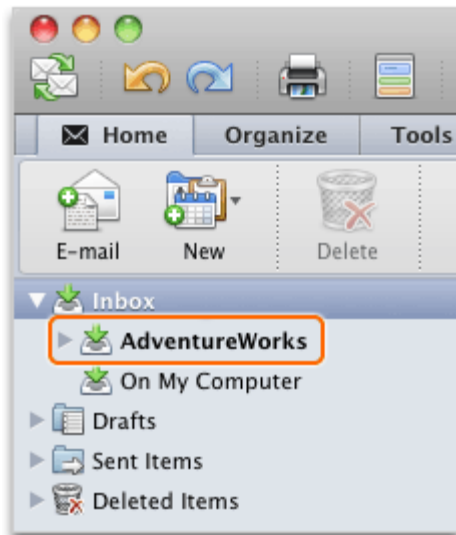
- Compose and send an e-mail message to a contact in your address book.


5. Explore the Inbox and other folders

The Inbox is the main folder where e-mail messages arrive when they are sent to you. You can also create other folders to help organize your messages.

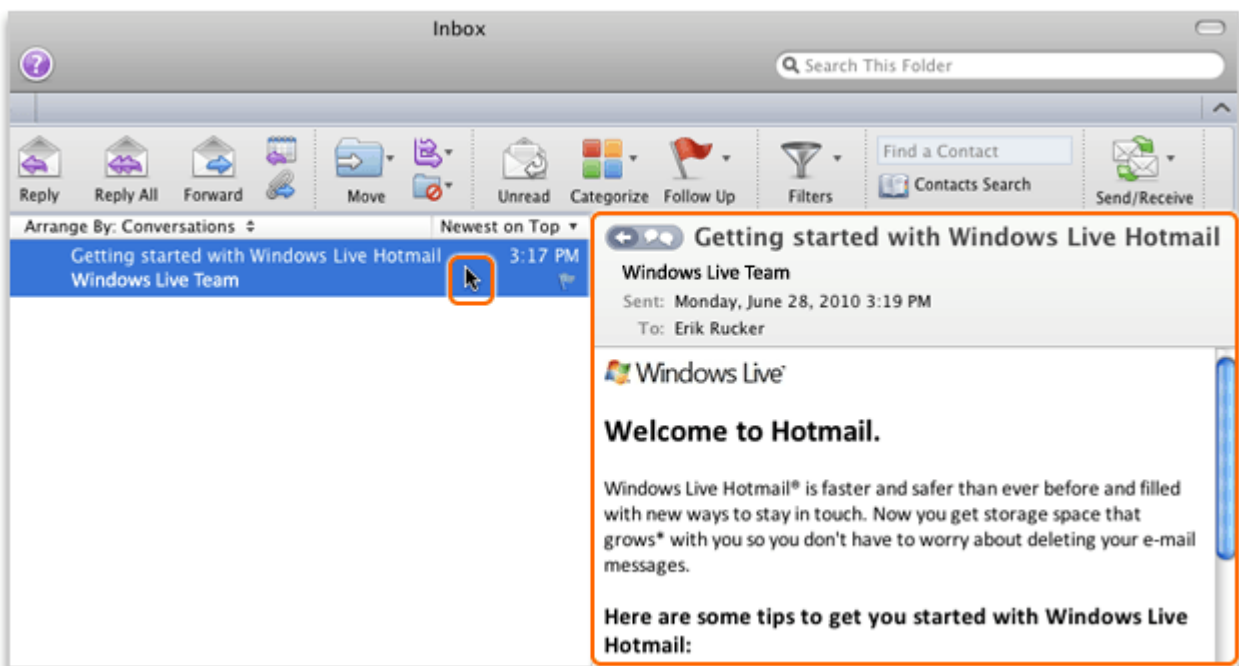
Let's view a message in your inbox, create a new folder, and then move and delete the message.

- 1 In the folder list, click a folder that contains a message.

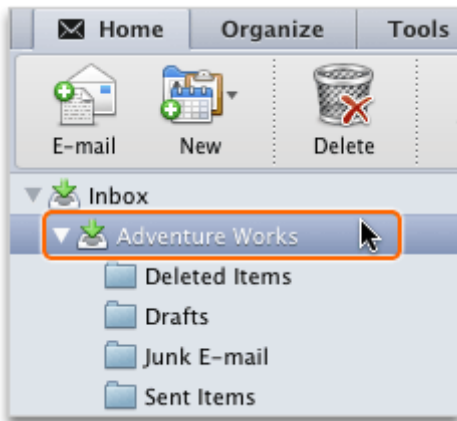


 **Note** The type of accounts that you add determine how folders appear in the folder list. To make changes to the folder list appearance, on the **Outlook** menu, click **Preferences**, and then click **General**.

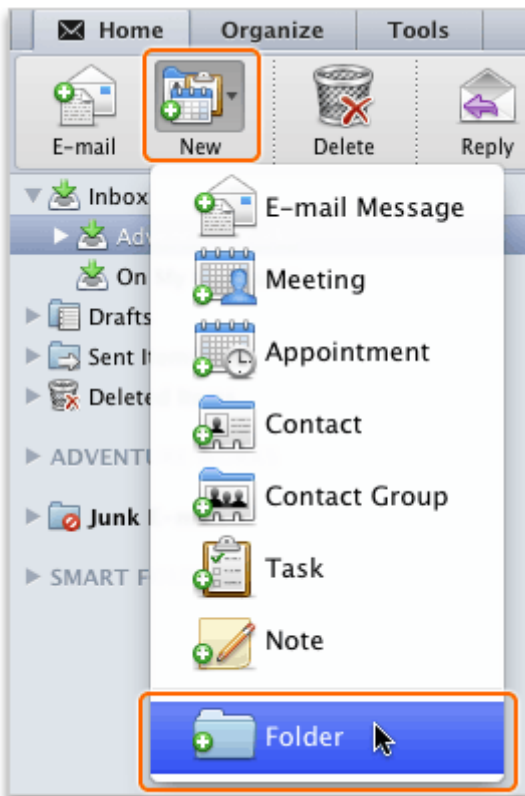
- 2 In the message list, click an e-mail message. The contents of the message appear in the reading pane.



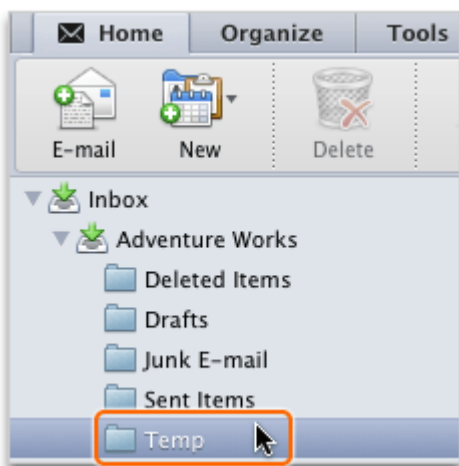
- 3 In the folder list, under **Inbox**, click the folder for the e-mail account that you added earlier.



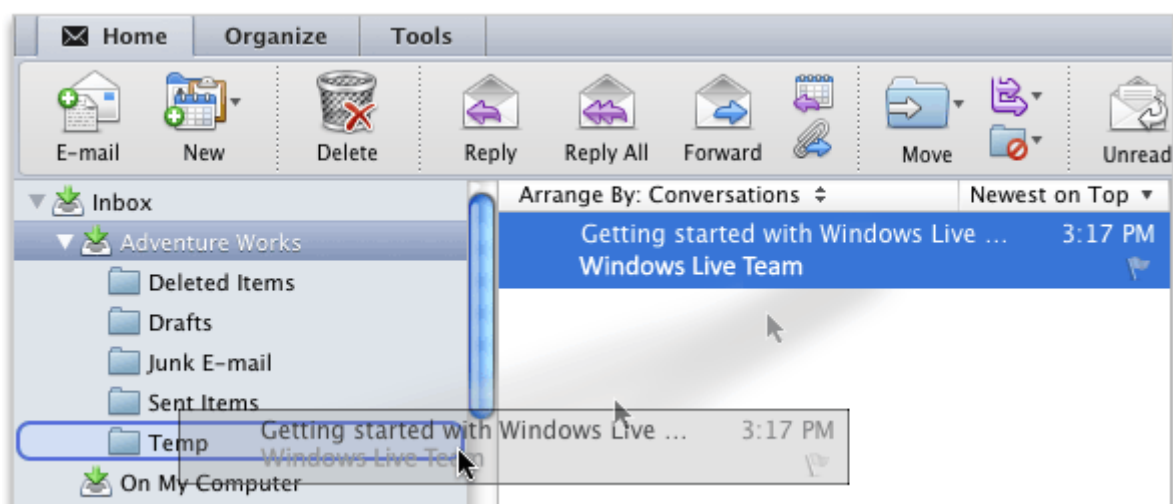
- 4 On the **Home** tab, click **New**, and then click **Folder**.




- 5 Type a name for the new folder (for example, **Temp**), and then press RETURN.

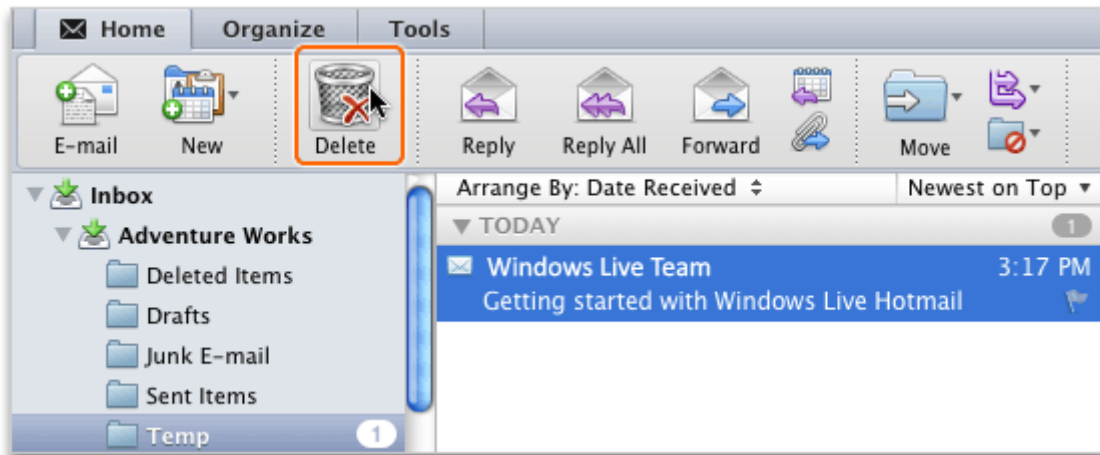


- 6 Click **Inbox**, and then drag a message to the new folder.



 **Tip** To set up rules for moving messages to folders automatically, click **Tools > Rules**.

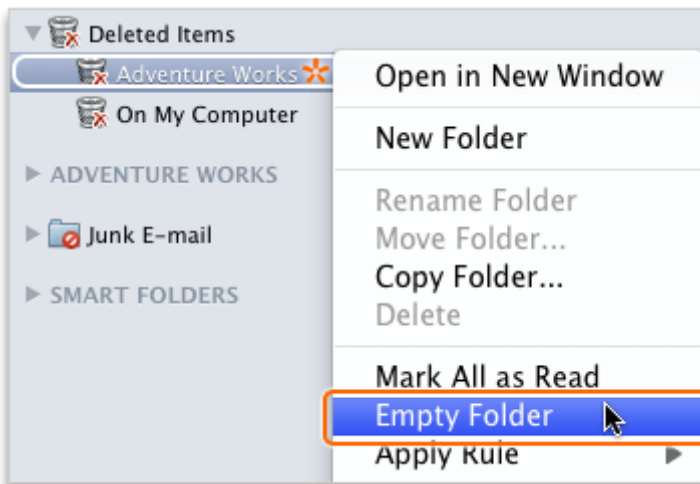
- 7 In the new folder, click the message, and then click **Delete**.



 **Tip** To undo the deletion, click **Edit > Undo**.

- 8 Hold down CONTROL, click the **Deleted Items** folder, and then click **Empty Folder**.

Important When you empty the **Deleted Items** folder, those items are deleted permanently and cannot be recovered.



Hints

- A number in a circle to the right of a folder (for example, 3) indicates the number of unread messages in the folder.
- For more options, hold down CONTROL and then click any message or folder.
- You should occasionally check the Junk E-mail folder to make sure messages were not incorrectly marked as "junk." If a message was incorrectly marked as junk, drag the message to your Inbox.
- Folders in the folder list are arranged in alphabetical order.

Before you move on

Make sure that you can do the following:

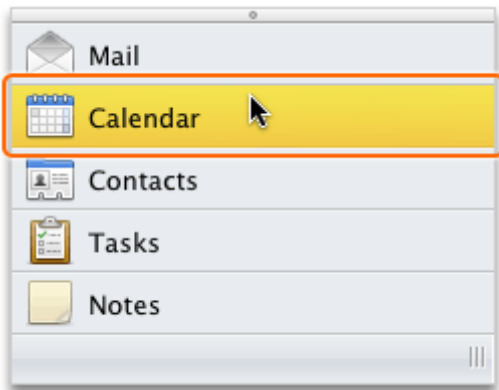
- Read a message in your Inbox.
- Create a new folder, and move a message to the new folder.
- Delete a message and empty the Deleted Items folder.

6. Add an appointment to your calendar

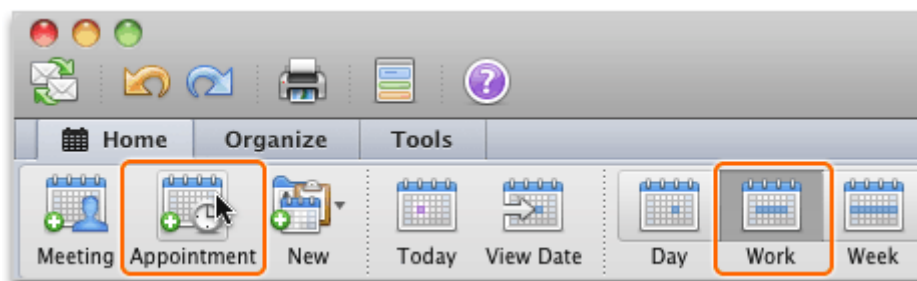
In Outlook, an appointment is a calendar item that has a specific start date and end date and a specific start time and end time. If you invite other people to an appointment, it is considered a meeting.


Let's add an appointment to the calendar.

- 1 On the view switcher, click **Calendar**.

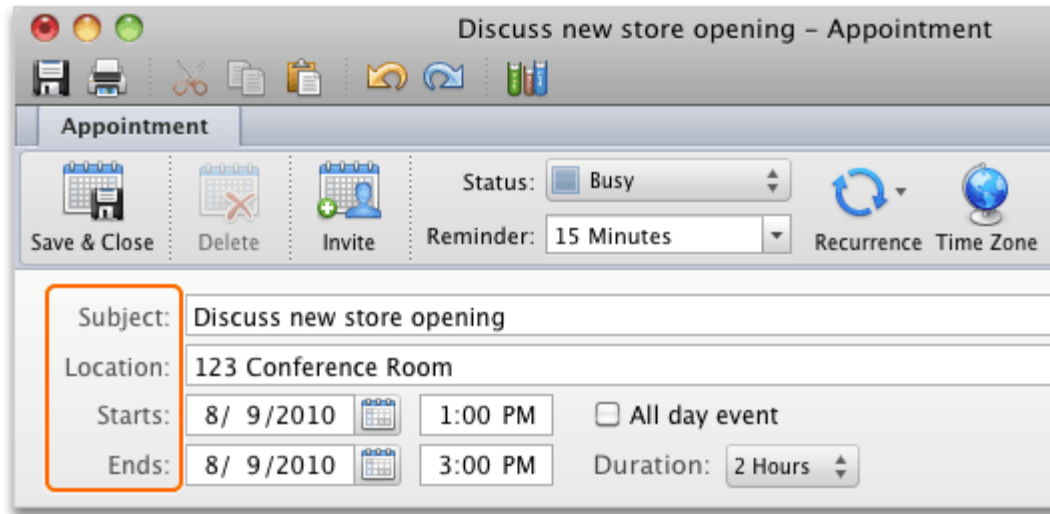


- 2 On the **Home** tab, click **Work**, and then click **Appointment**.



 **Tip** To create a new appointment directly from the calendar, double-click the date and time of the appointment on the calendar.

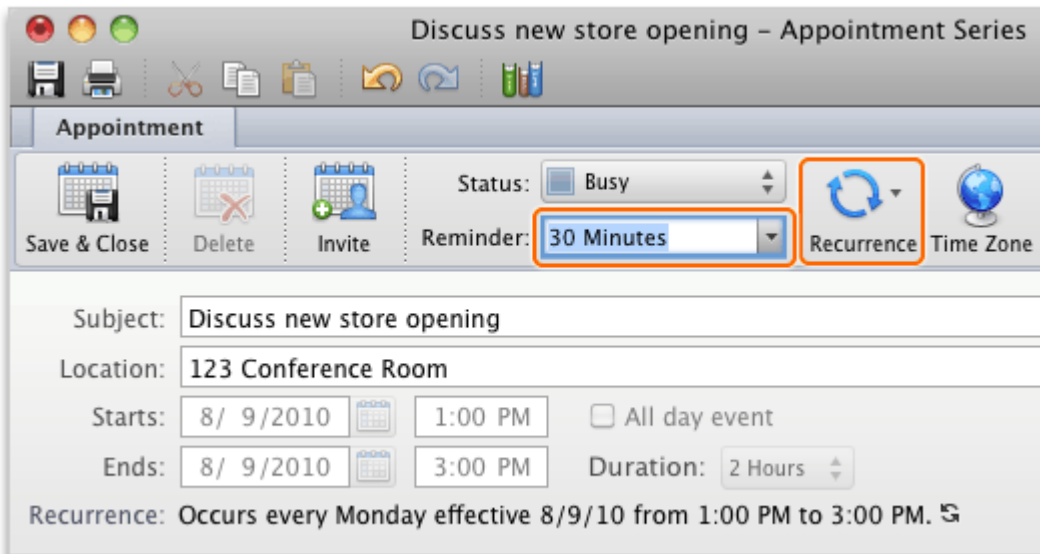
- 3 Type a subject and location for the appointment, and then select a start and end date and start and end time.



The screenshot shows the Outlook Appointment window titled "Discuss new store opening - Appointment". The "Appointment" tab is active. The "Subject" field contains "Discuss new store opening" and the "Location" field contains "123 Conference Room". The "Starts" field is set to "8/ 9/2010" at "1:00 PM" and the "Ends" field is set to "8/ 9/2010" at "3:00 PM". The "Duration" is "2 Hours". The "Status" is "Busy" and the "Reminder" is "15 Minutes". The "Recurrence" and "Time Zone" buttons are visible. The "Subject" and "Location" fields are highlighted with an orange border.

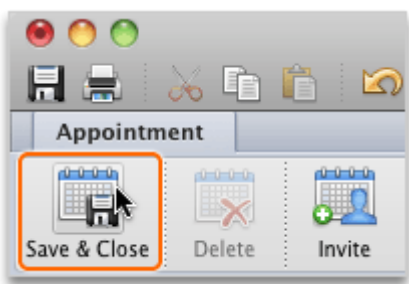
 **Note** To invite others and make the appointment a meeting, on the **Appointment** tab, click **Invite**.

- 4 On the **Appointment** tab, select how far in advance that you want a reminder and whether the appointment recurs.

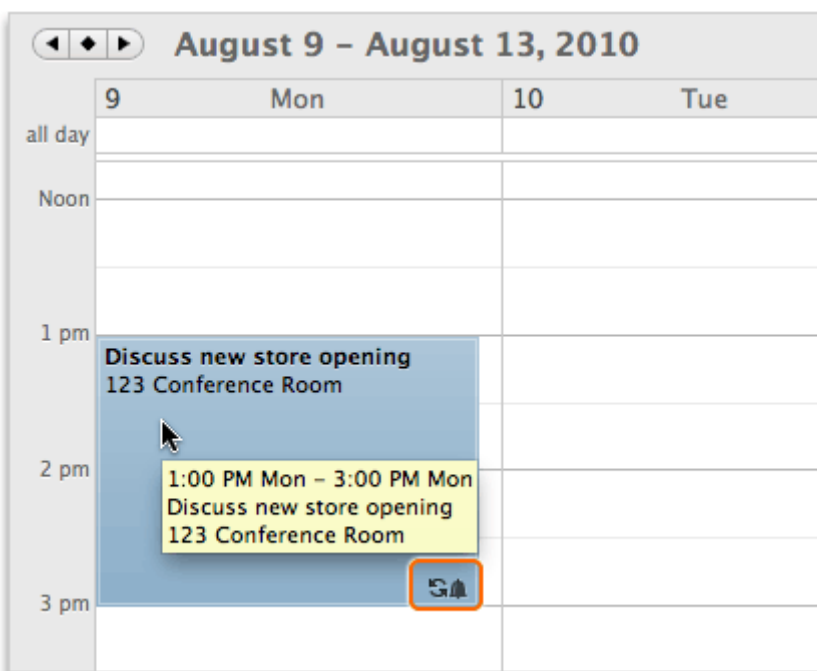


The screenshot shows the Outlook Appointment Series window titled "Discuss new store opening - Appointment Series". The "Appointment" tab is active. The "Subject" field contains "Discuss new store opening" and the "Location" field contains "123 Conference Room". The "Starts" field is set to "8/ 9/2010" at "1:00 PM" and the "Ends" field is set to "8/ 9/2010" at "3:00 PM". The "Duration" is "2 Hours". The "Status" is "Busy" and the "Reminder" is "30 Minutes". The "Recurrence" button is highlighted with an orange border. The "Recurrence" field shows "Occurs every Monday effective 8/9/10 from 1:00 PM to 3:00 PM." The "Subject" and "Location" fields are highlighted with an orange border.





- 5 On the **Appointment** tab, click **Save & Close**.



- 6 Notice that the appointment appears on your calendar on the date and time that you specified.



Hints

- To change the date or time for an appointment, drag the appointment to a new location on the calendar. Or double-click the appointment and make the changes that you want.
- To delete an appointment, select the appointment on the calendar, and then press DELETE. Or, double-click the appointment, and then on the **Appointment** tab, click **Delete**.
- To show or hide the mini calendar, in the upper-left corner of the navigation pane, click the border above the category list. When the pointer becomes , drag the border down or up.
- Small icons appear on appointments to indicate that a reminder is set () , that other people are invited () , and the appointment recurs () .

Before you move on

Make sure that you can do the following:

- Add an appointment to your calendar.

Quick Reference Card

To	Do this
Add a new e-mail account	Click Tools > Accounts .
Change the location of the reading pane	On the view switcher, click Mail . Click View > Reading Pane , and then select an option (for example, Below).
Add a contact group to the Address Book	On the view switcher, click Contacts . Then, on the Home tab, click Contact Group .
Add a picture for a contact	When adding a contact to the Address Book, double-click the thumbnail placeholder image that appears in the contact window. Or, you can drag a picture from your desktop or folder on to the placeholder image.
Compose a new e-mail message	On the view switcher, click Mail . Then, On the Home tab, click E-mail .
Check the spelling of a message before sending	When composing a message, on the Options tab, click Spelling . Or, click Edit > Spelling and Grammar > Check Document Now .
Send a file (for example, a Word document) with an e-mail message	When composing a message, on the Message tab, click Attach , and then select the file that you want to include.
Add a new mail folder	On the view switcher, click Mail . On the Home tab, click New , and then click Folder .
Empty the Deleted Items folder	Hold down CONTROL, click the Deleted Items folder, and then click Empty Folder .
Create a new appointment directly from the calendar	Double-click the appointment date and time on the calendar.
Change the date or time of an appointment	Drag the appointment to a new location on the calendar. Or, double-click the appointment and make the changes that you want.
Set user preferences, such as default e-mail fonts or signatures	Click Outlook > Preferences .

More Hints

- You can use Outlook to manage multiple e-mail accounts, including Microsoft Exchange, IMAP, and Windows Live accounts.
- The five main views in Outlook are mail, calendar, contacts, tasks, and notes.
- The contents of the folder list, navigation pane, and reading pane change based on what view is selected in the view switcher.
- A contact group is a group of related contacts (for example, the members of a book club). After you create a contact group, you can send e-mail to all members of the group at once.
- A copy of each message that you send appears in the **Sent Items** folder in the folder list.
- When you send a message, if you are connected to the Internet, your message is sent immediately. If you are having trouble sending messages, on the **Outlook** menu, make sure that a check mark does not appear next to **Work Offline**.
- The type of accounts that you add determine how folders appear in the folder list. To make changes to the folder list appearance, on the **Outlook** menu, click **Preferences**, and then click **General**.
- In Outlook, an appointment is a calendar item that has a specific start date and end date and a specific start time and end time. If you invite other people to an appointment, it is considered a meeting.
- You should occasionally check the Junk E-mail folder to make sure messages were not incorrectly marked as "junk." If a message was incorrectly marked as junk, drag the message to your Inbox.