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- » Checking your calendar
- » Entering appointments and contacts
- » Managing tasks
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Chapter **1**

Outlook Features You Really Need to Know

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

Explaining Why So Many People Use Outlook

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

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

Doing Anything in Outlook the Easy Way

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

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

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

OUTLOOK 2019 OR OUTLOOK 365?

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

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

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



REMEMBER

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

Using Email: Basic Delivery Techniques

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

Reading email

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

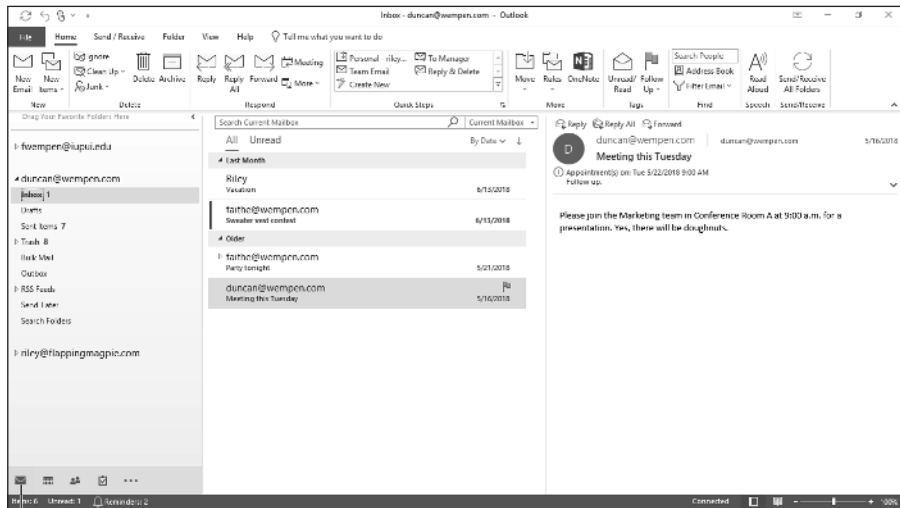


FIGURE 1-1:
A received message in the Inbox.

Mail button

To see an entire message, follow these steps:

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

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

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

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

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

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



TIP

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

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

Answering email

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

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

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

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



WARNING

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

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

Creating new email messages

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

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

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

The New Message form opens.

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

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

4. **Click the Send button.**

Your message is on its way!

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

Sending a File

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

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



REMEMBER

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

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

1. Open the document in Microsoft Word.

The document opens on-screen.

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

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

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

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

To enter multiple addresses, separate them with semicolons.

5. If you don't want the recipient to edit the file, click the Can Edit drop-down menu and choose Can View.

This setting determines whether or not the recipient will be able to make changes.

6. Type a message to the recipient if desired in the Include a Message (Optional) box.

This message will appear as the email message body. Figure 1-2 shows an example.

7. Click Share.

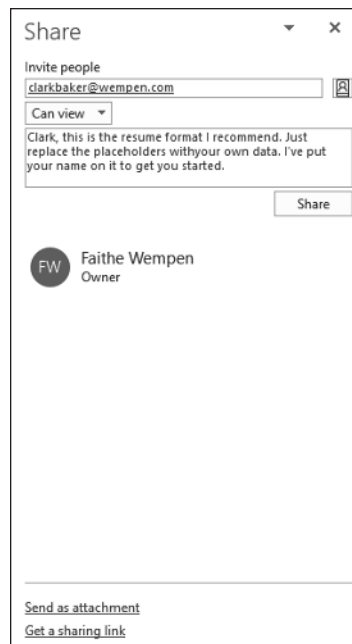


FIGURE 1-2:
You can email a link to a document right from Microsoft Word.

You can also send a copy of a document as an email attachment. This method sends a separate copy to each recipient, and doesn't require the file to be stored on OneDrive.

To email a file as an attachment, follow these steps:

1. Open the document in Microsoft Word.

The document opens on-screen.

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

This button provides a quick way to share; you can also use File, Share if you prefer.

3. If the Share dialog box appears, click Word Document.

OR

If the Share task pane appears, click Send as Attachment, and then click Send a Copy.

Either way, the New Message form opens with your document listed on the Attached line, as shown in Figure 1-3. If you want to type a message in the main part of the screen, you can, but it isn't necessary.

4. Enter the email address of the person you want to send the file to.

To enter multiple addresses, separate them with semicolons.

5. Change the subject line text if desired.

By default it's the filename.

6. Click Send.

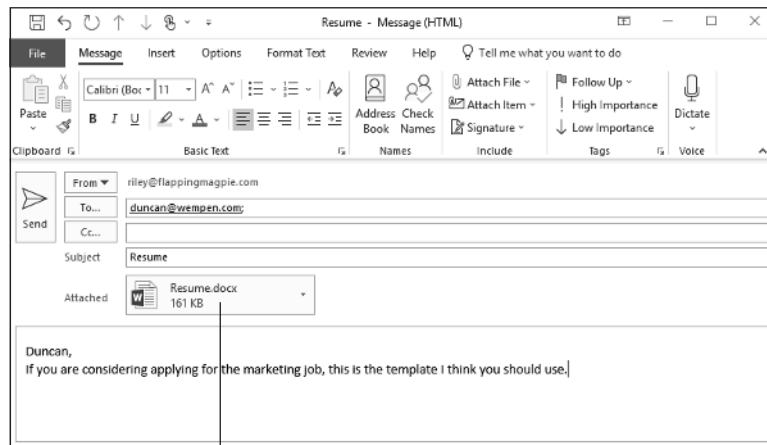


FIGURE 1-3:
You can email a file as an attachment from Microsoft Word.

Attachment

Whew! When you're just sending one Word file, these steps seem like a long way to go, but they'll always get your document on its way. For some reason, the folks at Microsoft made this task more laborious as the years have passed. But don't be discouraged. If you email documents frequently, I describe a more powerful way to attach files in Chapter 5.

Maintaining Your Calendar

Time management is a myth. You can't get more than 24 hours in a day — no matter how well you manage it. But you can get more done in a 24-hour day if you keep your calendar current. Outlook can help you with that.

Entering an appointment

If you've ever used an old-fashioned paper planner, the Outlook Calendar will look familiar to you. When you click the Calendar button in the Navigation bar and then click the Day button on the Home tab, you see a grid in the middle of the screen with lines representing each segment of the day. You can adjust the length of the segments from as little as 5 minutes to as much as an hour, as shown in Figure 1-4.

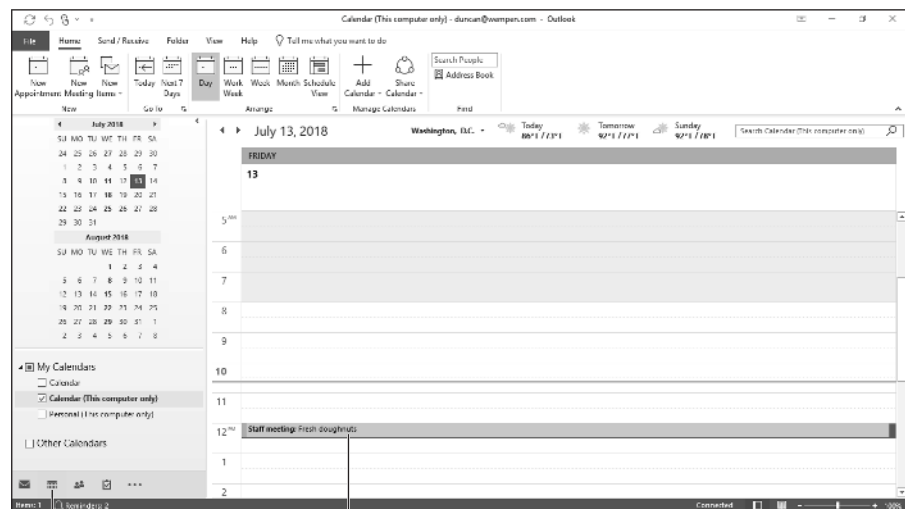


FIGURE 1-4:
Track your busy schedule in the Outlook Calendar.

Calendar button

Click the line representing the desired time and type the appointment name.



TIP

To adjust the time intervals, right-click one of the times along the left edge and choose a different interval from the shortcut menu.

To enter an appointment at a certain time, follow these steps:

1. Click **Calendar** in the Navigation bar to switch to the Calendar module if needed.
2. Click the line next to the time you want your appointment to begin.

3. **Type a name for your appointment.**
4. **Press Enter.**

If you want to enter more detailed information about your appointment — such as ending time, location, category, and so on — see Chapter 8 for the nitty-gritty on keeping track of all the details in your calendar.

Managing your schedule

Time management involves more than just entering appointments. If you're really busy, you want to manage your time by slicing and dicing your list of appointments to see when you're free to add even more appointments.



REMEMBER

You can choose from several different views of your calendar by clicking a button on the Home tab at the top of the Calendar screen:

- » Day
- » Work Week
- » Week
- » Month
- » Schedule View

If you need a more elaborate collection of Calendar views, click the View tab on the Ribbon and then choose one of the views listed under the Change View button. To really master time management, check out Chapter 8 to see the different ways you can view your Outlook Calendar.

Adding a Contact

When it's not *what* you know but *who* you know, you need a good tool for keeping track of who's who. Outlook is a great tool for managing your names and addresses, and it's just as easy to use as your "little black book."

To enter a new contact, follow these steps:

1. **Click People in the Navigation bar to switch to the People module if needed.**
2. **Click the New Contact button on the Home tab of the Ribbon.**

The New Contact entry form opens.

3. Fill in the blanks on the form.

Figure 1-5 shows an example.

4. Click the Save & Close button on the Ribbon.

Presto — you have a Contacts list.

Contact is open in its own window.

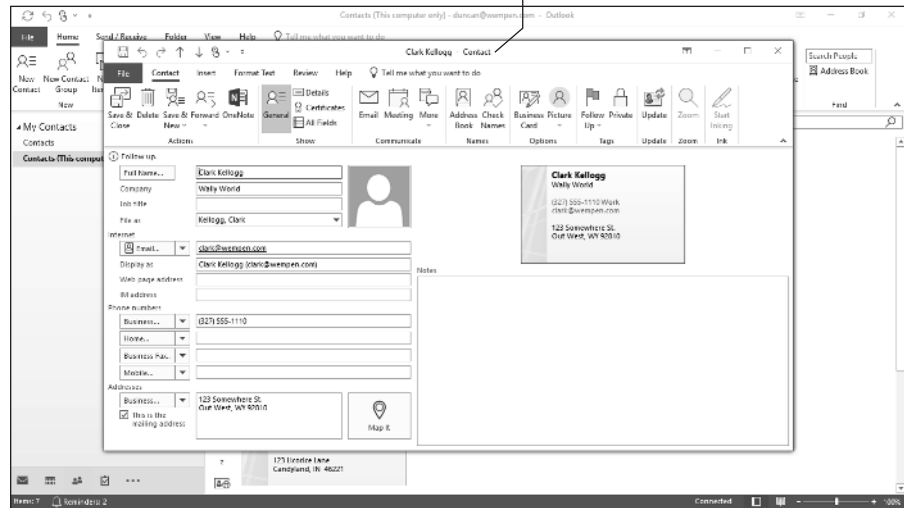


FIGURE 1-5:
Fill in the
form to create
the contact.

Outlook's Contacts feature can be a lot more than a physical address book — if you know the ropes. Chapter 7 reveals the secrets of searching, sorting, and grouping the names in your list — and of using email to keep in touch with all the important people in your life.

Entering a Task

Knowing what you need to do isn't enough; you need to know what to do next. When you're juggling 1,000 competing demands all at once, you need a tool that shows you at a glance what's up next so you can keep your work moving forward.

Outlook has several task management tools that help you organize your lengthy to-do list for peak performance. Those tools include the Tasks module, the To-Do list, and the To-Do bar. Chapter 9 describes all of them, but here's a quick way to get started in a jiffy.

To enter a new task, follow these steps:

1. Click **Tasks** in the **Navigation bar** to switch to the **Tasks module** if needed.
2. On the **Home** tab of the **Ribbon** in the **Current View** group, click **Simple List** to make sure the **Task list** is in **Simple List view**.

You can create new tasks from any view, but the wording of the next step is slightly different depending on what view you are in, so Step 2 is just to help you avoid any confusion as you are getting started with Outlook.

3. Click in the **Click Here to Add a New Task Box** and type the name of your task.

Remember in the previous step when I said the wording was a little different? In some of the views, the wording is **Type a New Task**, and in other views the box for adding a new task this way isn't present at all. That's why I had you start out in **Simple List view** in Step 2, to avoid that mess. You're welcome.

4. **Press Enter.**

Your new task moves down to the **Task list** with your other tasks, as shown in **Figure 1-6**.

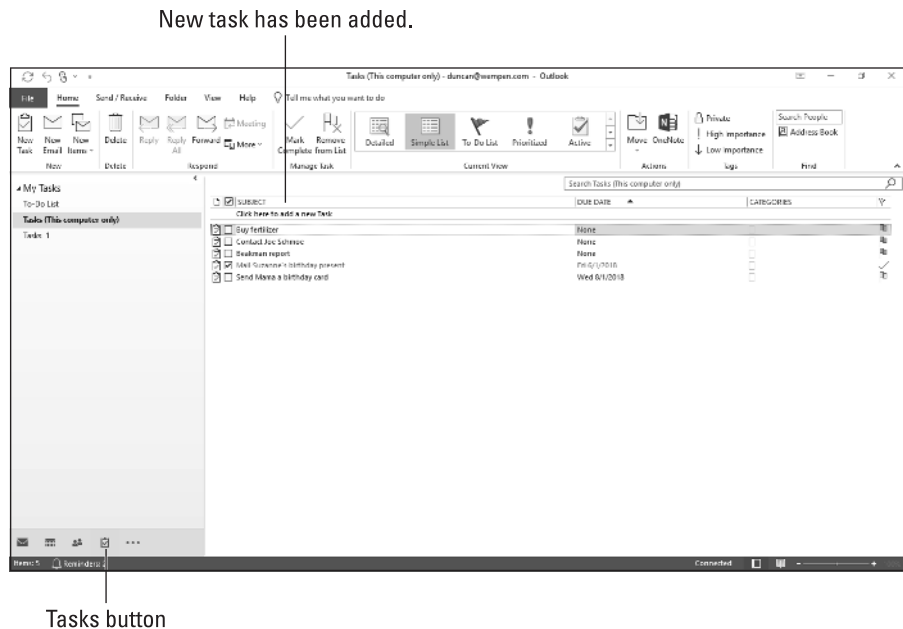


FIGURE 1-6:
Entering
your task in the
Task list.

Outlook can help you manage anything from a simple shopping list to a complex business project. In Chapter 9, I show you how to deal with recurring tasks, how to regenerate tasks, and how to mark tasks as complete — and earn the right to brag about how much you’ve accomplished.

Taking Notes

I have hundreds of little scraps of information I need to keep somewhere, but until Outlook came along, I didn’t have a place to put them. Now all the written flotsam and jetsam go into my Outlook Notes collection — where I can find them all again when I need them.

To create a new note, follow these steps:

- 1. Click Notes in the Navigation pane to switch to the Notes module if needed.**

If you don’t see Notes in the Navigation bar, click the More button (. . .) and then click Notes.

- 2. Press Ctrl+Shift+N.**

A blank note opens.



TIP

You could have also clicked New Note on the Ribbon in Step 2, but I wanted to show you an alternate method. A word about shortcuts: Ctrl+N starts a new item in whatever section you are working with; for example, in Mail it starts a new message and in Tasks it starts a new task. But Ctrl+Shift+N is special in that it always starts a new note, no matter which section of Outlook you are in.

- 3. Type the text you want to save.**

The text you type appears in the note, as shown in Figure 1-7.

- 4. Press Esc.**

The note you created appears in your list of notes.

After you’re in the habit of using Outlook to organize your life, I’m sure you’ll want to move beyond the basics. That’s what the rest of this book shows you. When you’re ready to share your work with other people, send email like a pro, or just finish your workday by 5 p.m. and get home, you’ll find ways to use Outlook to make your job — and your life — easier to manage.

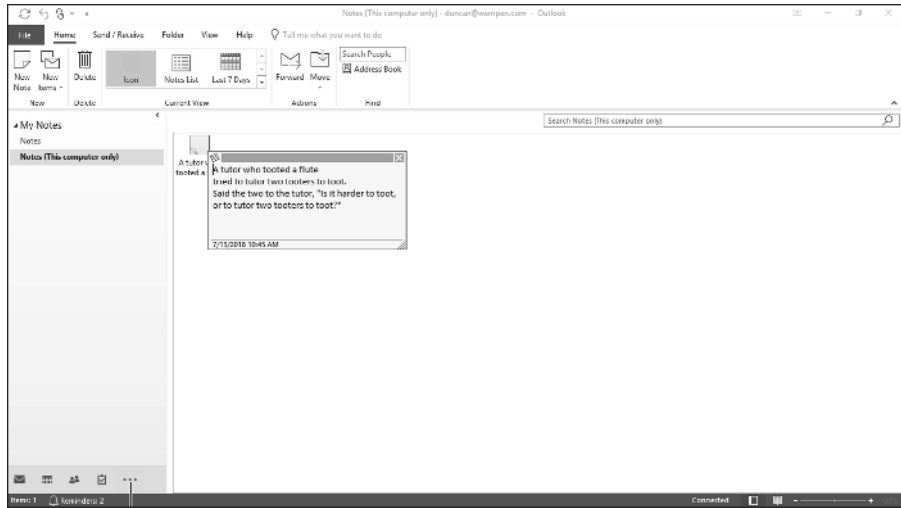


FIGURE 1-7:
Preserve your
prose for
posterity in an
Outlook note.

More button