

# Microsoft Outlook 2013

Lesson 1

## Getting to Know Outlook

# Objectives

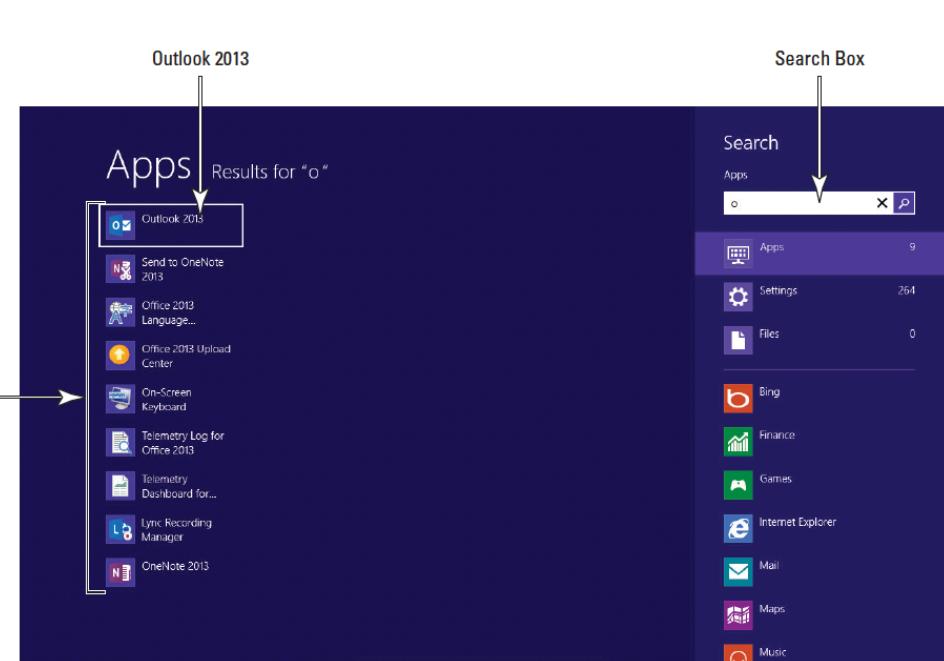
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Skills	Exam Objective	Objective Number
Starting Outlook		
Working in the Outlook Window	Configure views	1.1.5
Personalizing Outlook	Customize the Navigation Pane	1.1.3
Using Backstage View	Set Outlook options	1.1.7

# Step by Step: Launch Outlook from the Windows Start Screen

- **GET READY.** Before you begin these steps, be sure to turn on and log on to your computer.

1. Press the Windows Key, if necessary to return to the Windows Start screen.
2. Key the word **Outlook**. As soon as you begin typing, Microsoft Windows Search will present a list of applications that match what you typed, as shown above.



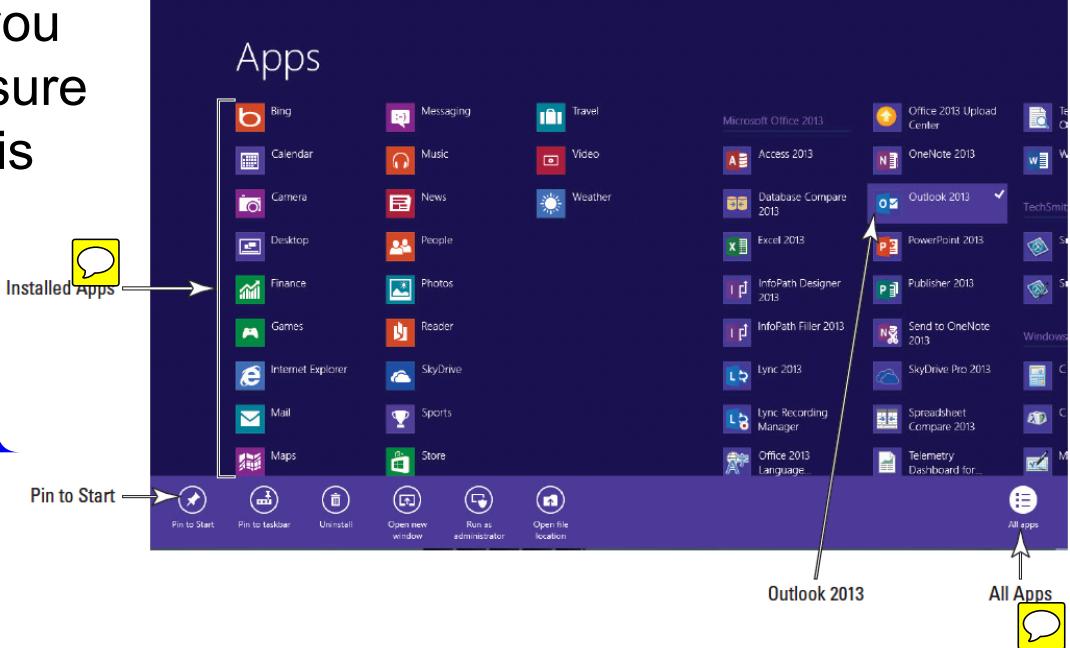
# Step by Step: Launch Outlook from the Windows Start Screen

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3. Click **Outlook 2013** in the results list to open the Outlook window.
  4. Compare your screen to the figure on slide 3-, and locate each of the labeled elements.
  5. Click the **Close** button in the upper-right corner.
- **PAUSE.** You will launch Outlook again in the next exercise.

# Step by Step: Launch Outlook from a Shortcut Tile

- **GET READY.** Before you begin these steps, be sure that Microsoft Outlook is not running.

1. Click the **Start** button, or press the Windows key if necessary to return to the Windows Start screen.  

2. Right-click in an area with no tiles. A bar appears at the bottom of the screen, as shown above.

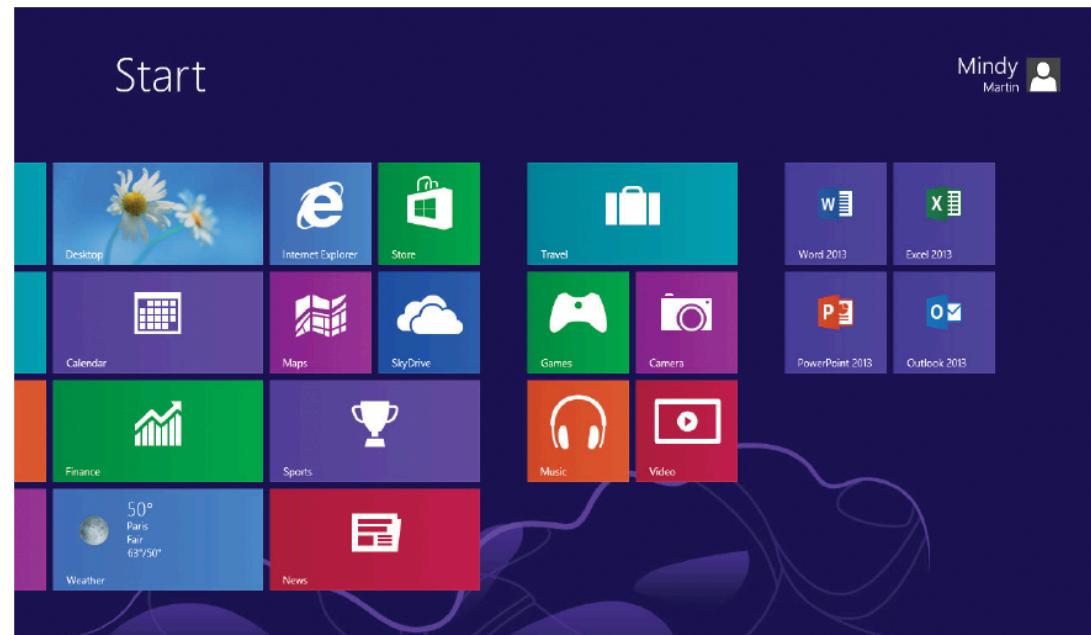
# Step by Step: Launch Outlook from a Shortcut Tile

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3. Click the **All apps** icon  in the bottom right of the bar. Windows displays a list of all the apps installed on the computer.
4. Scroll to the right until you locate Outlook 2013 on the list.
5. Right-click the **Outlook 2013** tile. Options appear in the bar at the bottom of the screen.
6.  Select If you “Unpin from Start” in the bottom bar instead, skip to Step 7 **Pin to Start**.

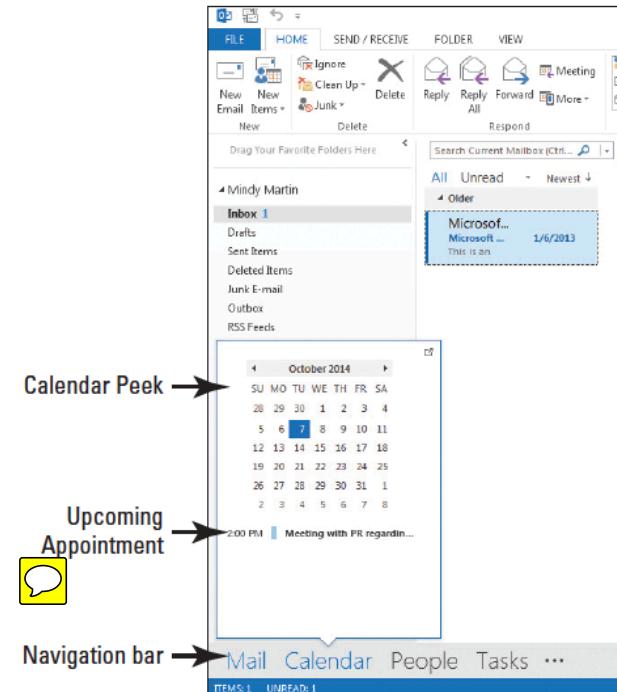
# Step by Step: Launch Outlook from a Shortcut Tile

7. Click the **Start** button or press the Windows key to return to the Start screen (see below).
  8. Scroll as needed to locate the Microsoft Outlook 2013 tile.
  9. Click the **Outlook 2013** tile. Microsoft Outlook 2013 is launched.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.



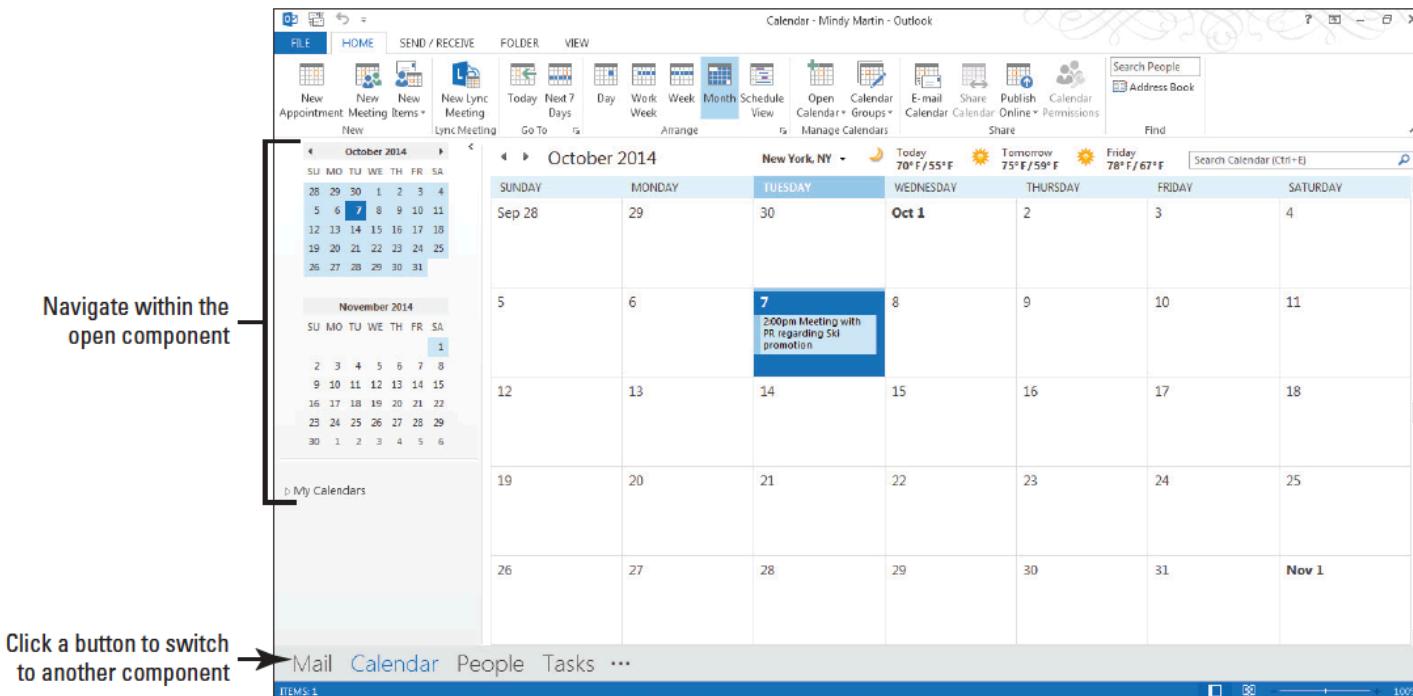
# Step by Step: Navigate in Outlook

- **GET READY. LAUNCH** Outlook if it is not already running.
  1. Locate the Navigation bar. The Navigation bar is located in the lower left of the screen. This is the tool that helps you access each of the primary Outlook functions, such as the Calendar and the People view.
  2. Hover the mouse over the **Calendar** button in the Navigation bar. Outlook displays the Calendar Peek showing upcoming events, as shown at right.



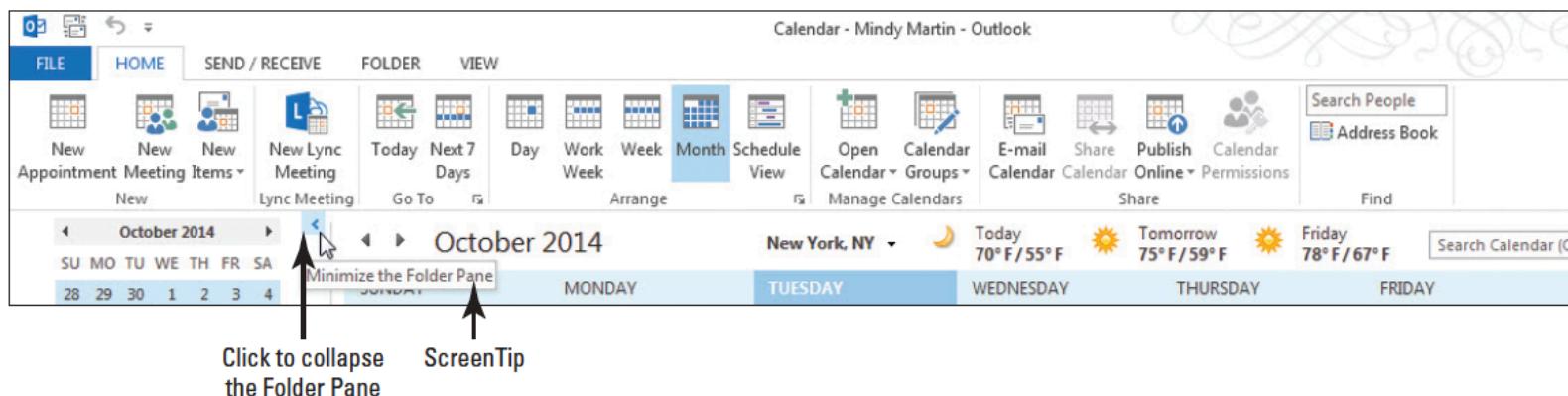
# Step by Step: Navigate in Outlook

3. Click the **Calendar** button in the Navigation bar. The Calendar is displayed showing today's date, as shown below.



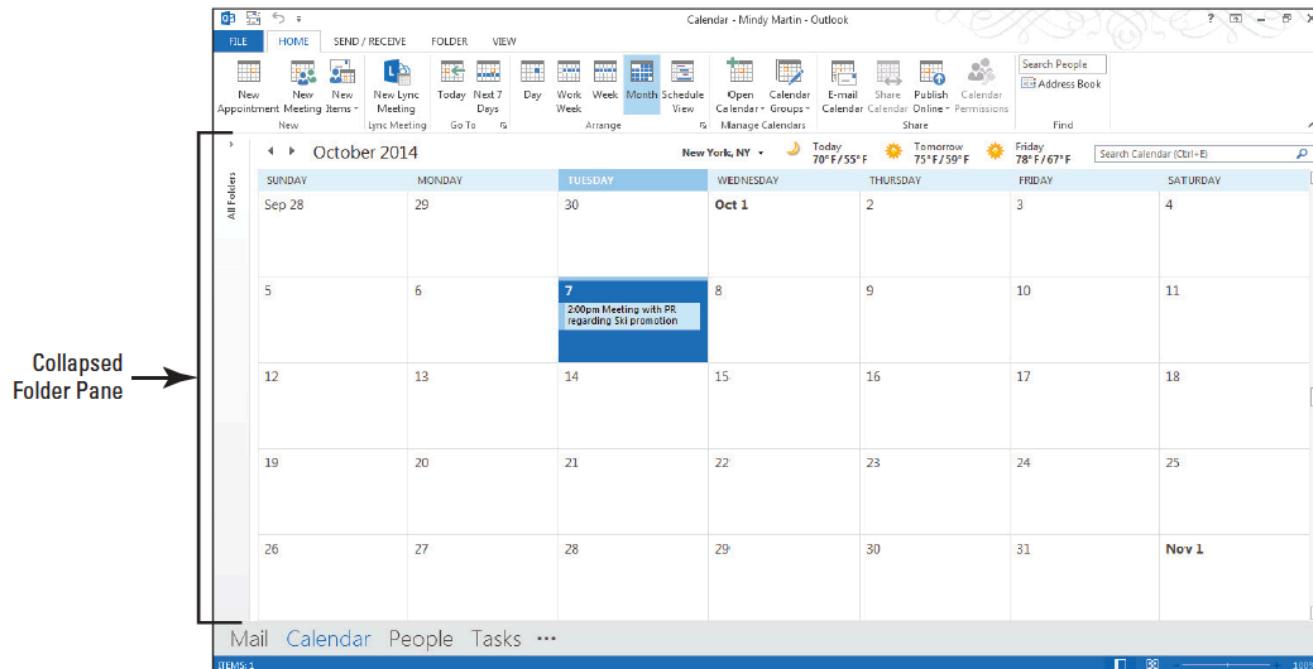
# Step by Step: Navigate in Outlook

4. Point to the small, left-facing arrow at the top right corner of the Folder Pane. A ScreenTip appears identifying the arrow as the Minimize the Folder Pane button (shown below). These minimize buttons are often referred to as collapse buttons.



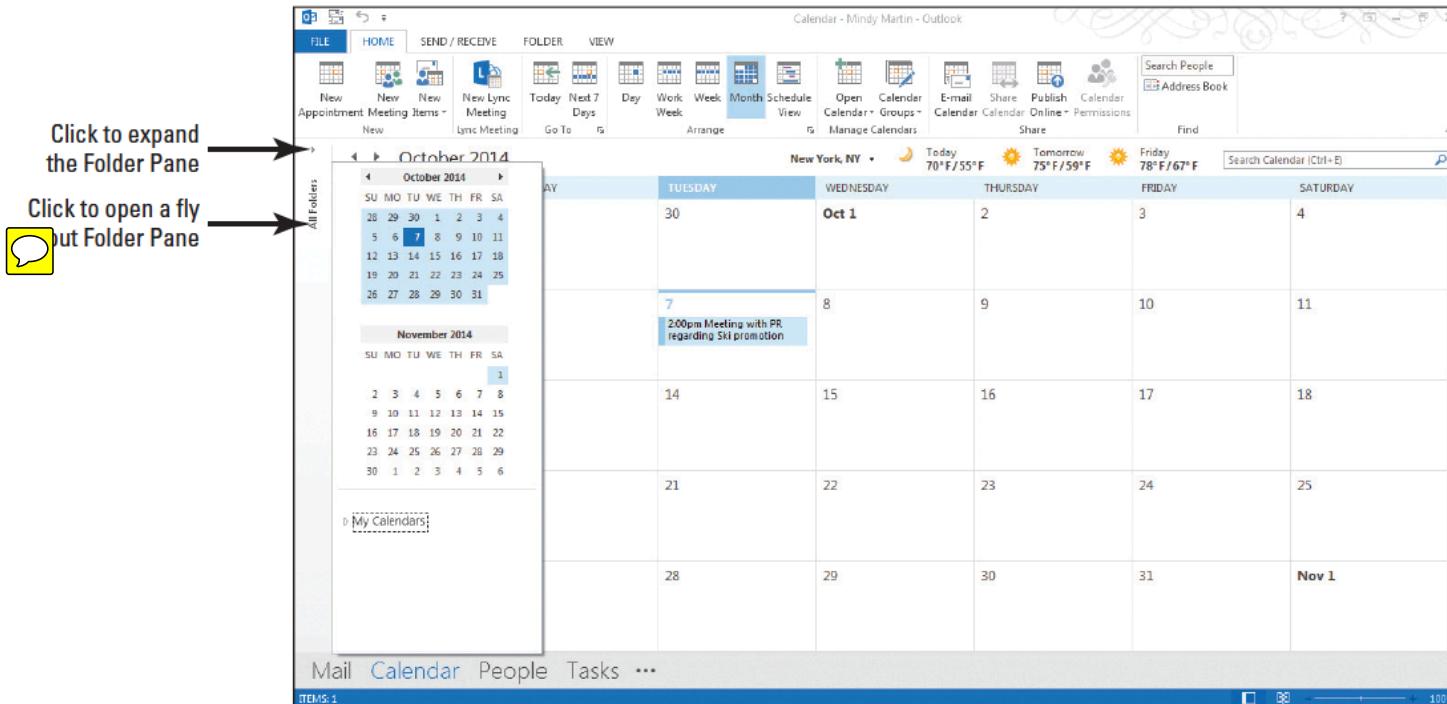
# Step by Step: Navigate in Outlook

5. Click the **Minimize the Folder Pane** button in the Folder Pane. The Folder Pane collapses to show more of the Calendar, as shown below.



# Step by Step: Navigate in Outlook

6. Click **All Folders** on the collapsed Folder Pane. A fly-out of the Folder Pane is displayed showing you all the information in the Pane, as shown below.



# Step by Step: Navigate in Outlook

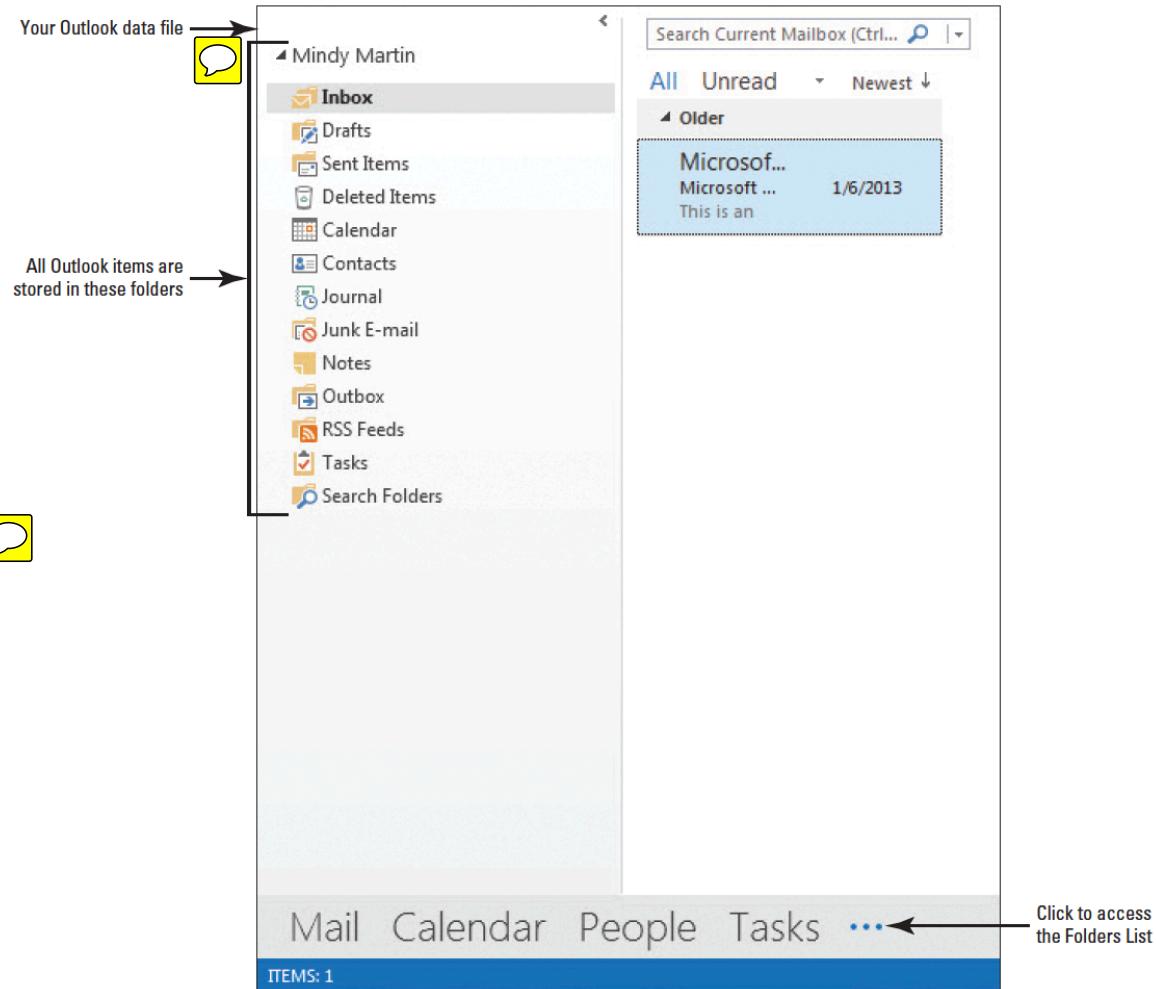
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- A **fly-out** is a menu or pane that opens floating above the main window, without changing the layout of the underlying main window.
7. Click **All Folders** again to remove the fly-out.
  8. Click the **Expand the Folder Pane arrow** on the Folder Pane. The full Folder Pane is restored.
  9. Click  on the Navigation bar. A shortcut menu listing additional Navigation bar options is displayed.

# Step by Step: Navigate in Outlook

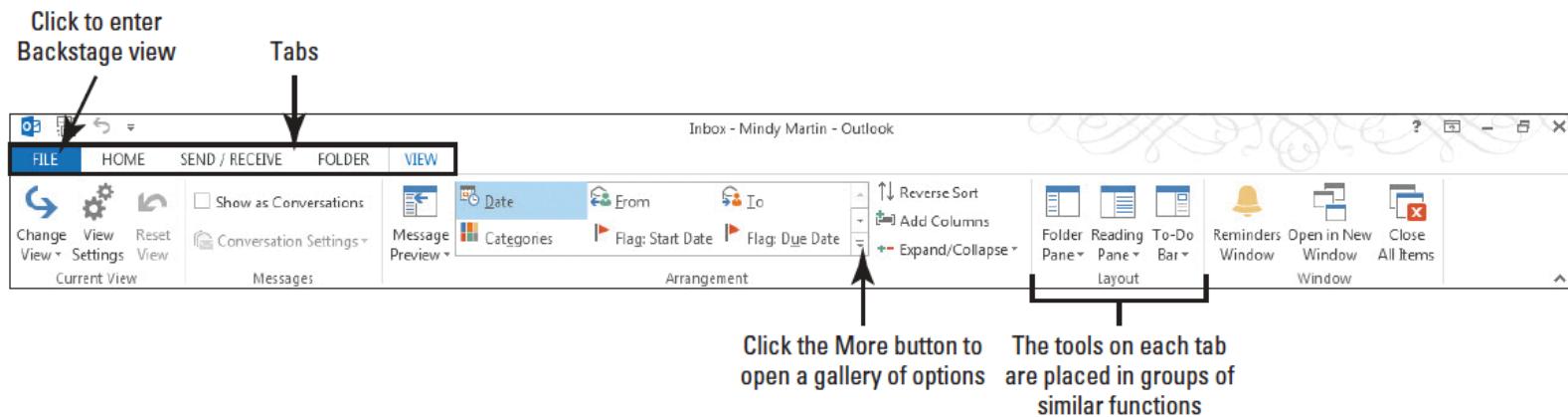
10. Click the **Folders** option. The Folder Pane changes to display the Folders List, as shown at right.

- **PAUSE. LEAVE** Outlook open to use in the next exercise.



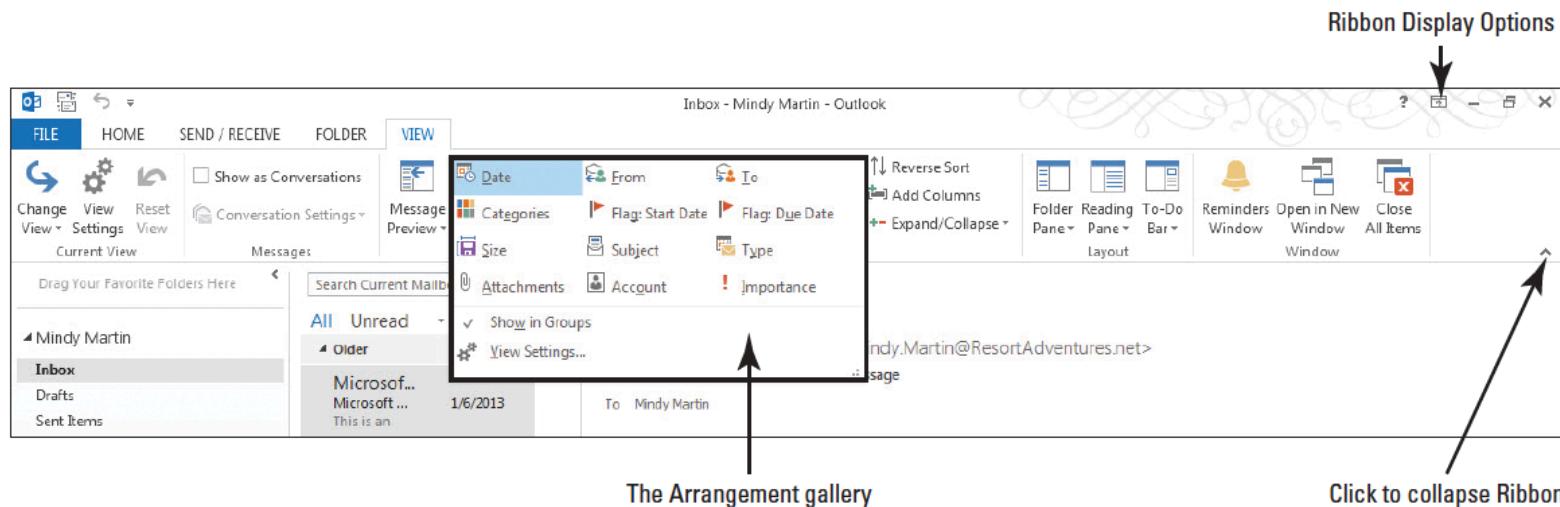
# Step by Step: Use the Onscreen Tools

- **GET READY. LAUNCH** Outlook if it is not already running and ensure that the Mail feature is active.
  1. Click the **Mail** button in the Navigation bar and click the **VIEW** tab. The Ribbon is divided into **groups** of related commands, as shown below.



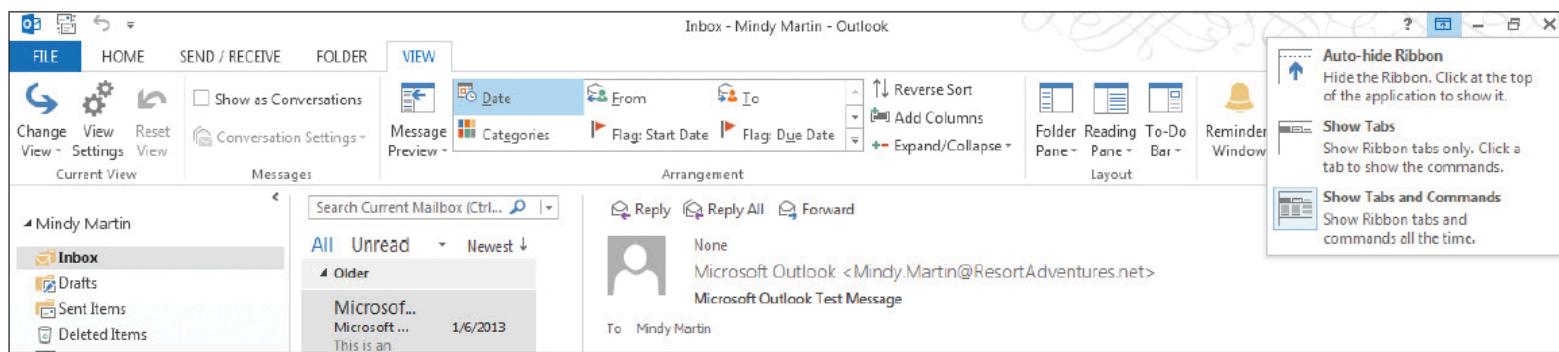
# Step by Step: Use the Onscreen Tools

2. Locate the Arrangement group. When there are too many options to store neatly in a group, Outlook places the buttons in a dropdown window called a **gallery**. The **More** button tells you that there are more options available in the gallery.
3. Click the **More** button to display the Arrangement gallery. A gallery of available options for arranging email drops down, as shown below.



# Step by Step: Use the Onscreen Tools

4. Click the **Ribbon Display Options** button. A list of available Ribbon options drops down, as shown below.
5. Click the **Auto-Hide Ribbon** option. Notice that the entire Ribbon disappears.



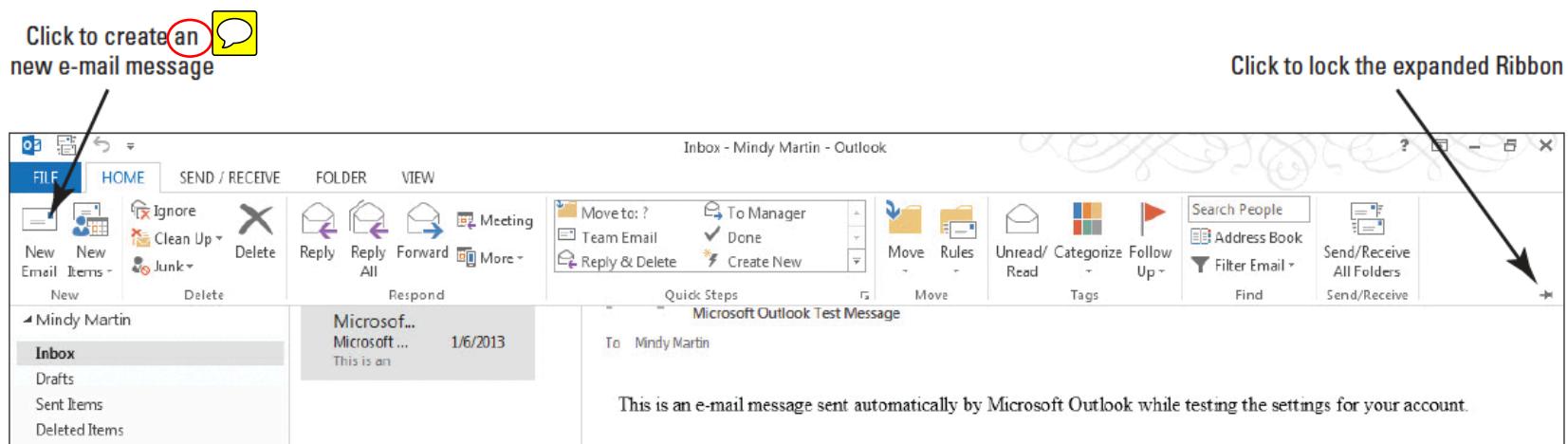
# Step by Step: Use the Onscreen Tools

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6. Hover at the top of the window (where the title bar used to be). Notice that a colored bar appears.
7. Click the bar at the top of the window. Notice that the entire Ribbon reappears.
8. Click anywhere else in the Outlook window and the Ribbon disappears again.
9. Click the Ribbon Display Options button again, and select Show Tabs and Commands.
10. Click the **Collapse the Ribbon** arrow on the Ribbon. The Ribbon collapses into a single bar showing only the tab names.

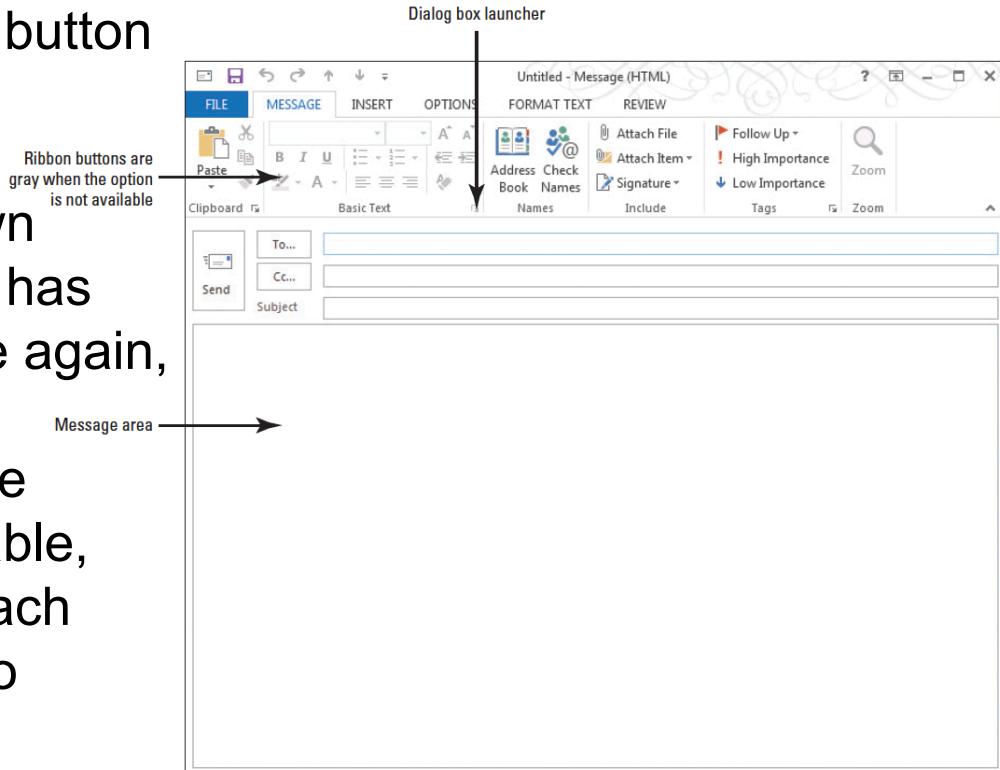
# Step by Step: Use the Onscreen Tools

11. Click the **HOME** tab.
12. Click the **Pin the Ribbon** icon to restore the Ribbon, as shown below.



# Step by Step: Use the Onscreen Tools

13. Click the **New Email** button in the New group. A message window is displayed, as shown at right. Notice that it has its own Ribbon. Once again, the Ribbon is divided into tabs based on the type of options available, and the options on each tab are organized into groups of similar commands.



# Step by Step: Use the Onscreen Tools

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14. Locate the Title bar at the top of the window. It tells you that this window is named ***Untitled—Message***. You can always identify windows and dialog boxes using the Title bar.
15. Notice that most of the buttons in the Clipboard and Basic Text groups are gray. When ~~buttons~~ on the Ribbon ~~are~~ gray, it means that the option is not available. ~~Since~~ this message window contains no text, the options for formatting and working with text are not yet available.
16. Click in the message area. The Ribbon fills with color as options become available. Most of the buttons on the Ribbon are now available in preparation for entering text.

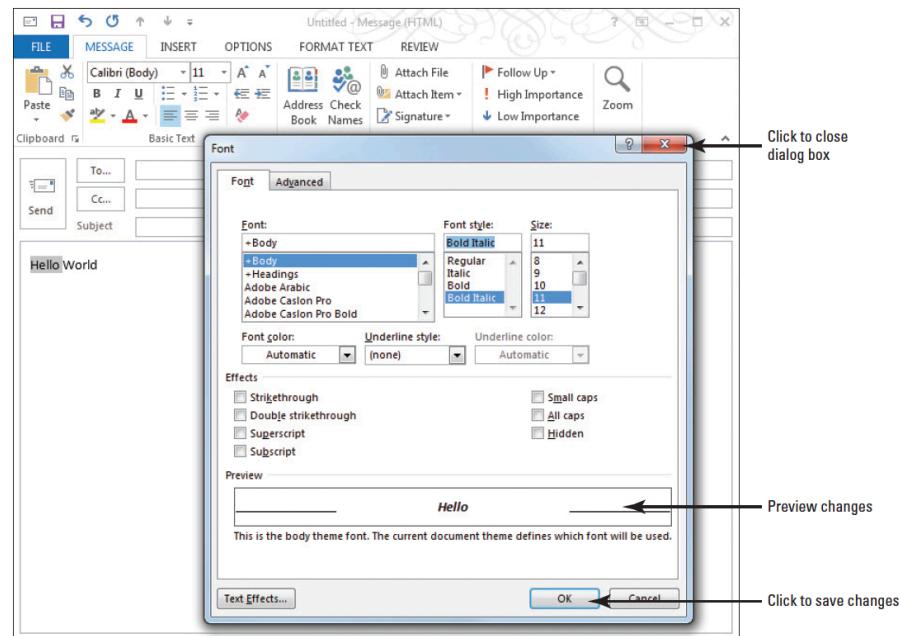
# Step by Step: Use the Onscreen Tools

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17. In the message area, key **Hello World**.
18. Drag the mouse over the word **Hello** in the message area to select it.
19. Click the dialog box launcher in the **Basic Text group** on the Ribbon. A traditional Microsoft dialog box is displayed containing additional options for this command group. Notice that many of the same options are available in both the dialog box and on the Ribbon.

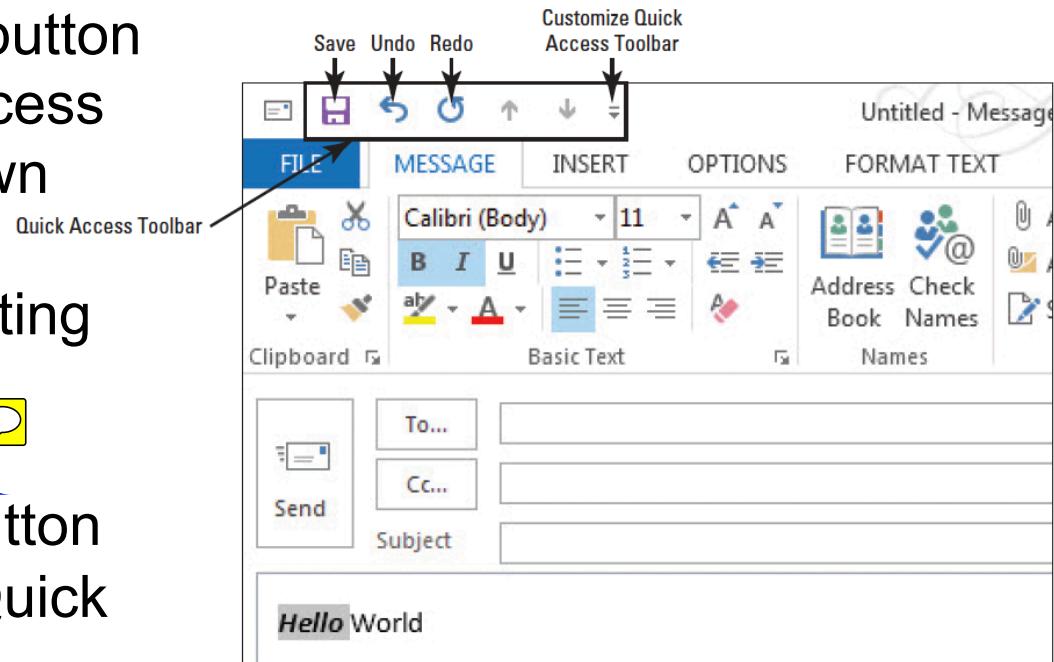
# Step by Step: Use the Onscreen Tools

20. In the Font Style box, click **Bold Italic**.  
Notice how the text *Hello* in the Preview area of the dialog box changes to reflect your choice, as shown at rights.
21. Click the **OK** button to close the dialog box and save the changes.



# Step by Step: Use the Onscreen Tools

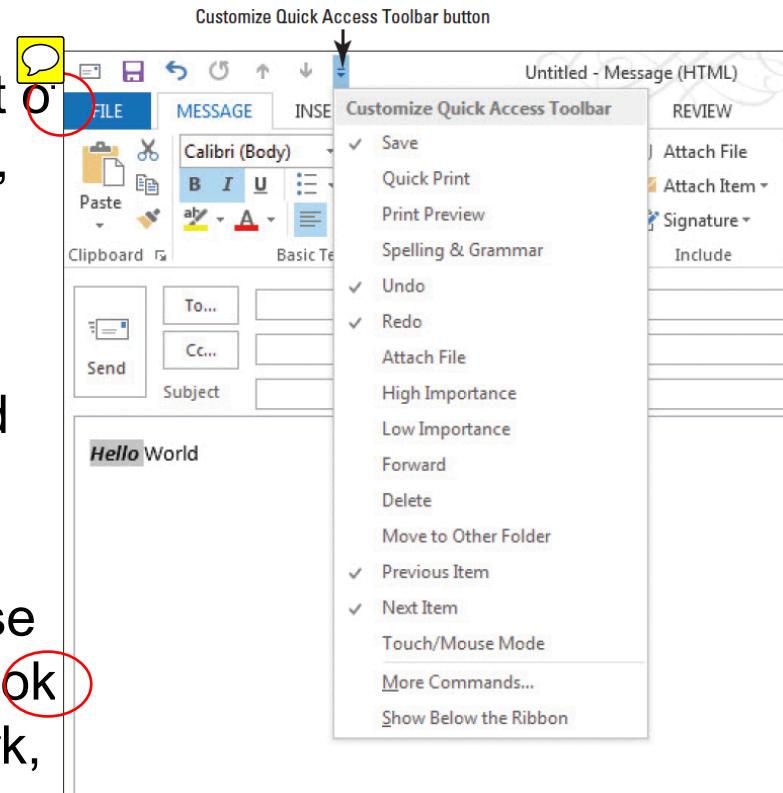
22. Click the **Undo** button on the Quick Access Toolbar, as shown at right. The bold italic formatting is removed from the word “Hello” and the Redo button appears in the Quick Access Toolbar.



23. Click the **Redo** button on the Quick Access Toolbar to restore the text formatting. The Redo button grays out again to let you know that there are no more actions that can be redone.

# Step by Step: Use the Onscreen Tools

24. Click the **Customize Quick Access Toolbar** button. A list of available buttons is displayed, as shown at right. To add or remove buttons from the Quick Access Toolbar simply select or deselect a command from the list.
25. Click the **Close** button at the far right of the Title bar to close the message window. If Outlook prompts you to save your work, click **No**.



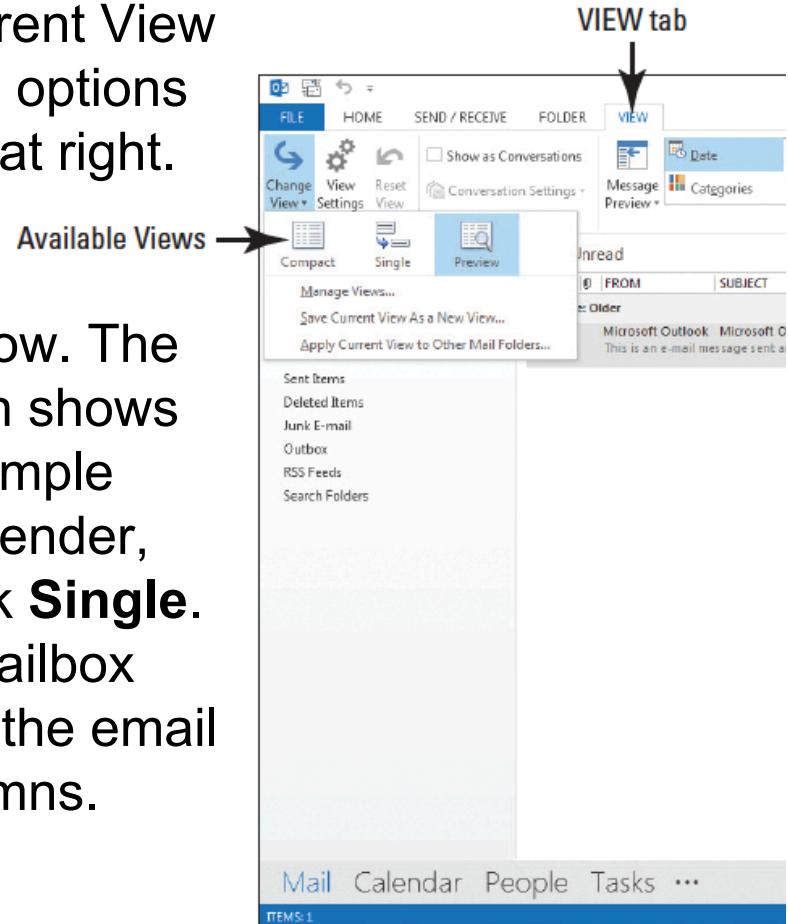
# Step by Step: Change the Outlook View

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- **GET READY. LAUNCH** Outlook if it is not already running and ensure that the HOME tab is active.
  1. If necessary, click the **Mail** button in the Navigation bar, and then click the **Inbox** folder to display your mailbox.
  2. Click the **VIEW** tab to display more options.

# Step by Step: Change the Outlook View

3. Click **Change View** in the Current View group to see the basic viewing options for the Mail feature, as shown at right. The currently selected view is highlighted. Three views are available for the Mail window. The default view is Compact, which shows the items in your mailbox as simple two-line items containing the sender, the date, and the subject. Click **Single**. The Single view flattens the mailbox items into a single line with all the email information spread out in columns.



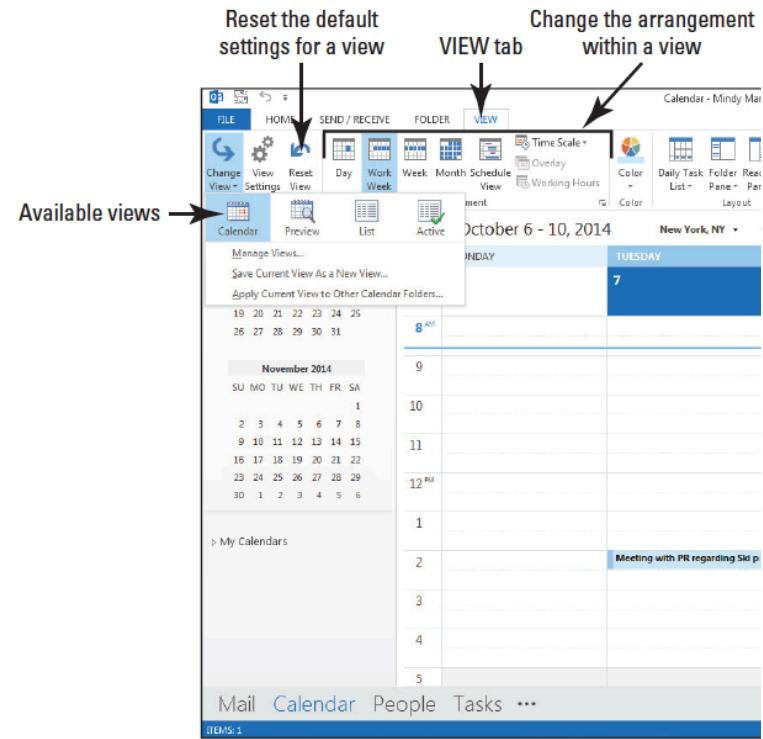
# Step by Step: Change the Outlook View

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4. Click **Change View** again, and click **Preview**. Notice how the screen changes to expand from a single compressed line for each item to include a short **Preview** of each email's contents and the Reading Pane disappears.
5. Click **Change View** in the Current View group and select **Compact** to return to the default Mail view.
6. Click the **Calendar** button in the Navigation bar to display the Calendar feature, and click the **VIEW** tab to see the different Calendar viewing options. You can change the arrangement of the onscreen Calendar in each view. Month is the default option.

# Step by Step: Change the Outlook View

7. Click the **Day** button on the **VIEW** tab, to view the day's schedule.
8. Click the **Week** button to show an entire week's schedule.
9. Click the **Work Week** option. The Calendar view now displays the current work week, as shown at right.



# Step by Step: Change the Outlook View

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10. Click **Change View** in the Current View group to see the available views. Make sure that the default Calendar is selected.
11. Click **List**. The Calendar changes to provide a simple list of calendar items. The Active view is similar, but only shows those events that have not already occurred.
12. Click **Change View** in the Current View group, and select **Calendar**.
13. Click **Reset View** in the Current View group to change to the default Calendar view. Outlook will present you with a warning box asking you to verify that you really want to reset the view.

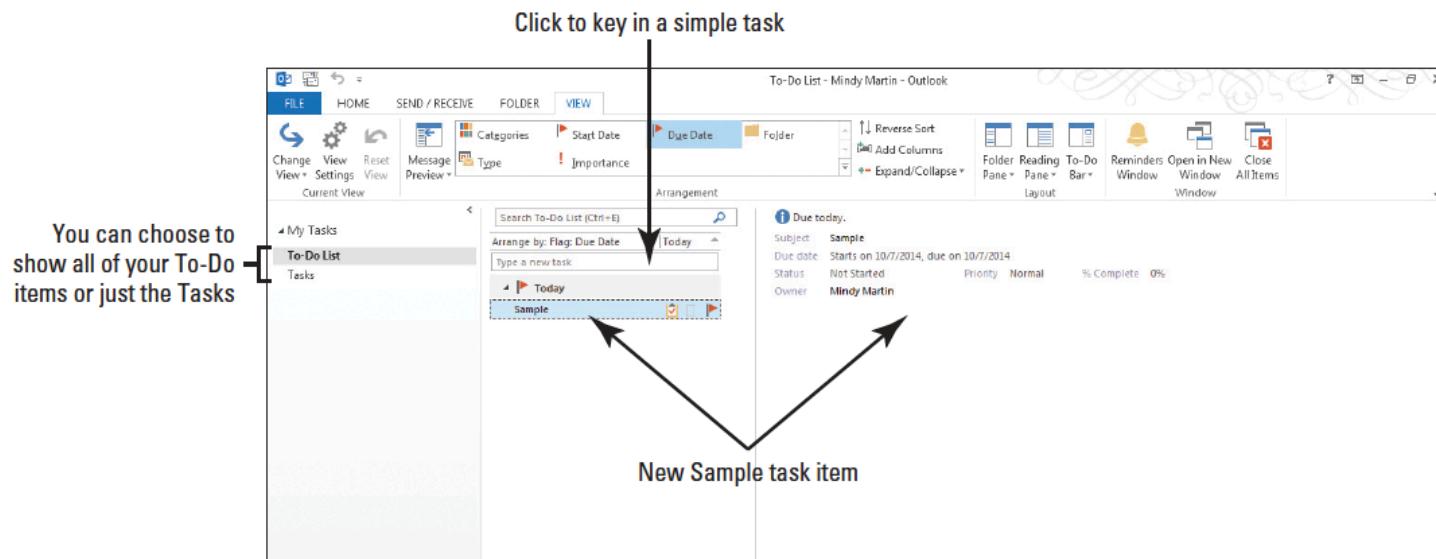
# Step by Step: Change the Outlook View

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14. Click **Yes**.
15. Click the **Tasks** button in the Navigation bar. Your To-Do List is displayed.
16. Click the **Type a new task** field and key **Sample**. [Press **Enter**.] The new task drops to the Task List and a flag appears indicating that the task is for today.

# Step by Step: Change the Outlook View

17. Click the **Sample** task. The Ribbon fills with color as options become available, as shown below.
18. Click the **VIEW** tab, and click **Change View** in the Current View group to see the viewing options.



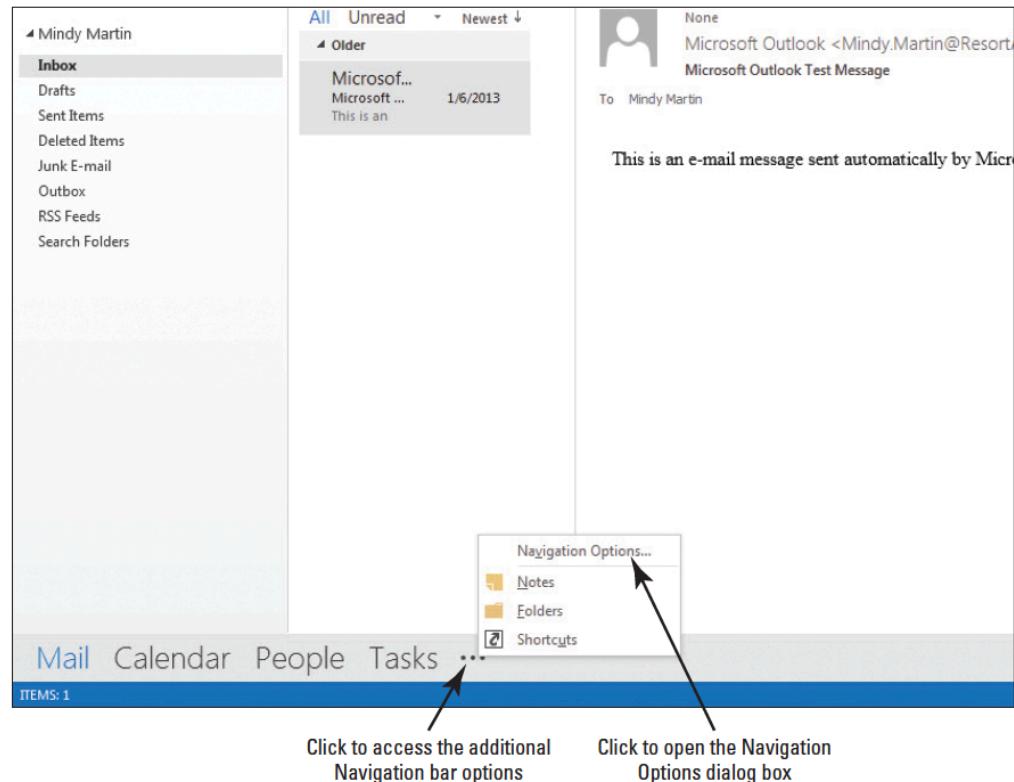
# Step by Step: Change the Outlook View

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19. Click on each option in the **Change View gallery** to see how the screen layout changes. You can choose from a number of different options—views that show all the details about a task item (Detailed) or views that let you filter your Task List to contain only items that fit the criteria you choose (Prioritized, Active, Completed, Today, Next 7 days, Overdue, Assigned).
  20. Click **Change View** and select **Today**. Click the **Sample** task again, if it isn't already selected.
  21. Click the **HOME** tab and select **Delete** in the Delete group to remove your sample task. Click the **Undo** button in the upper left corner of the screen to restore the Sample task.
  22. Click **Mail** in the Navigation bar to return to the Inbox.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

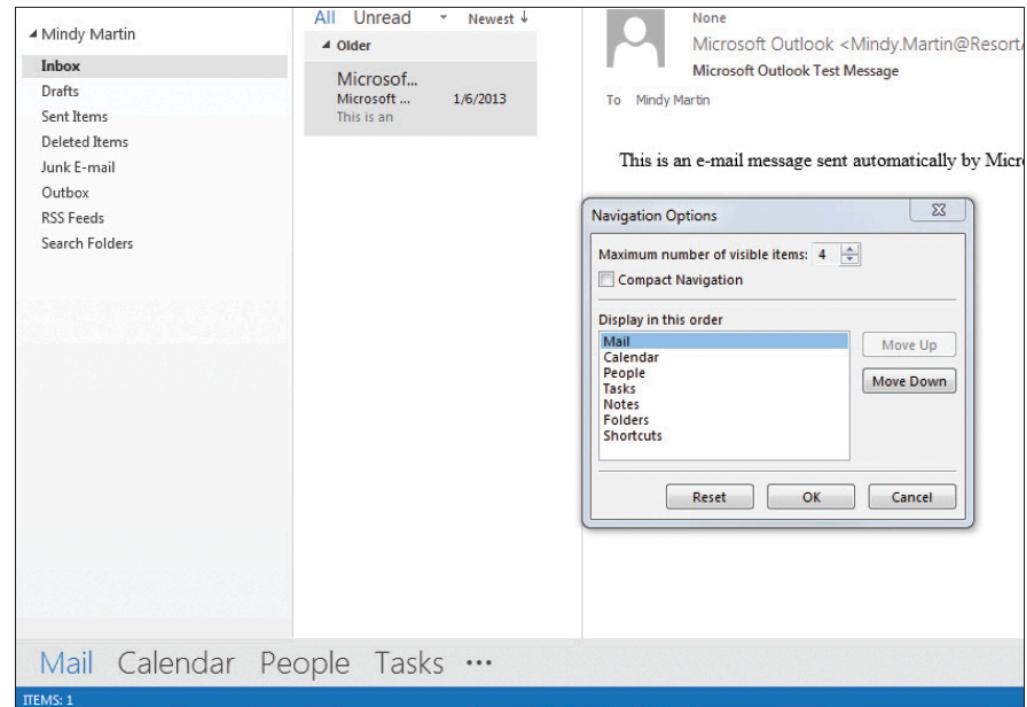
# Step by Step: Customizing the Navigation Bar

- **GET READY.**  
**LAUNCH** Outlook if it is not already running.
  1. Click **Mail** in the Navigation bar, if necessary, to display the default Outlook opening screen.
  2. Click  on the Navigation bar, as shown at right.



# Step by Step: Customizing the Navigation Bar

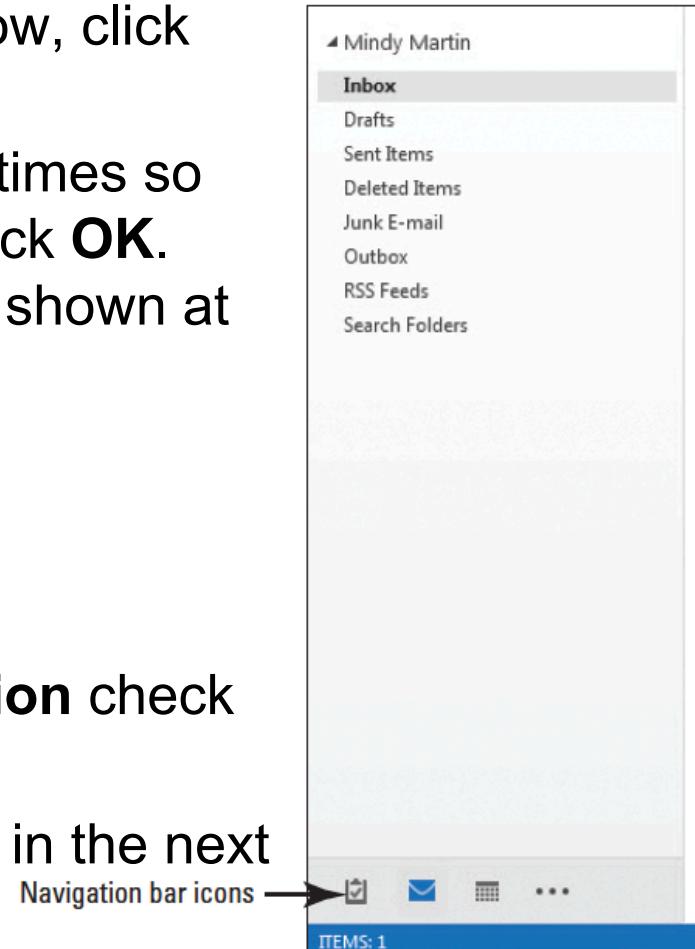
3. Select **Navigation Options**. The Navigation Options dialog box appears, as shown at right.
4. Change the Maximum number of visible items to 3.
5. Select the **Compact Navigation** check box.



# Step by Step: Customizing the Navigation Bar

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6. In the Display in this order window, click **Tasks**.
  7. Click the **Move Up** button *three times* so Tasks is before Mail and then click **OK**.  
The Navigation bar changes, as shown at right.
  8. Click  on the Navigation bar.
  9. Select **Navigation Options**.
  10. Click the **Reset** button.
  11. Deselect the **Compact Navigation** check box and then click **OK**.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.



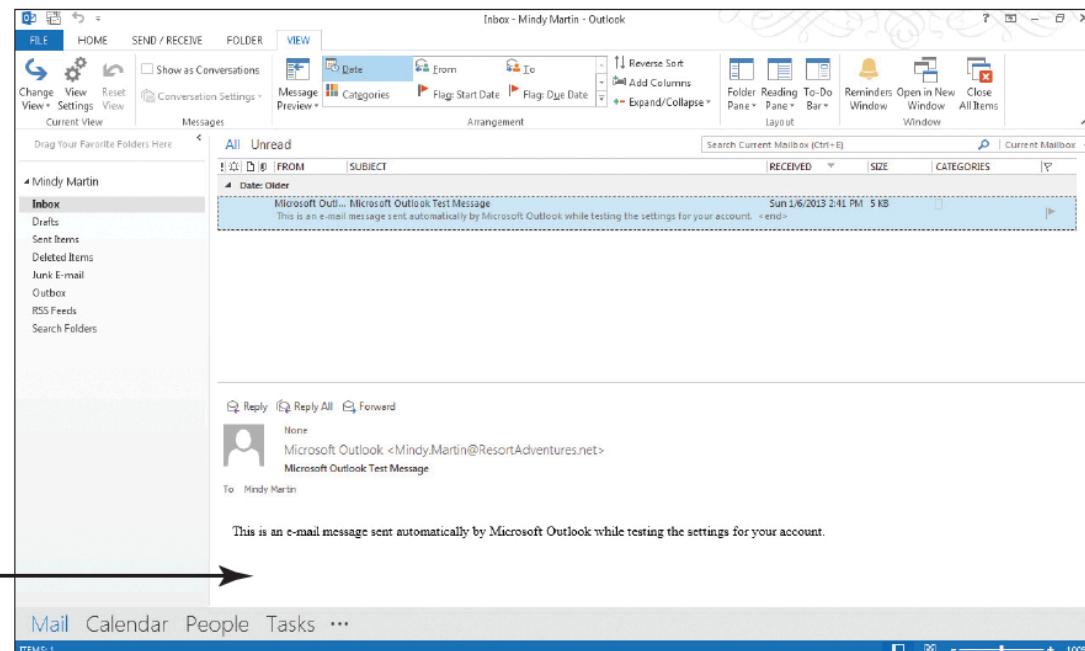
# Step by Step: Change the Reading Pane View

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- **GET READY. LAUNCH** Outlook if it is not already running.
  1. Click **Mail** in the Navigation bar to display the default Outlook opening screen, if necessary. Notice that the Reading Pane is visible on the right of the main content pane.
  2. On the **VIEW** tab, click the **Reading Pane** button in the Layout group.

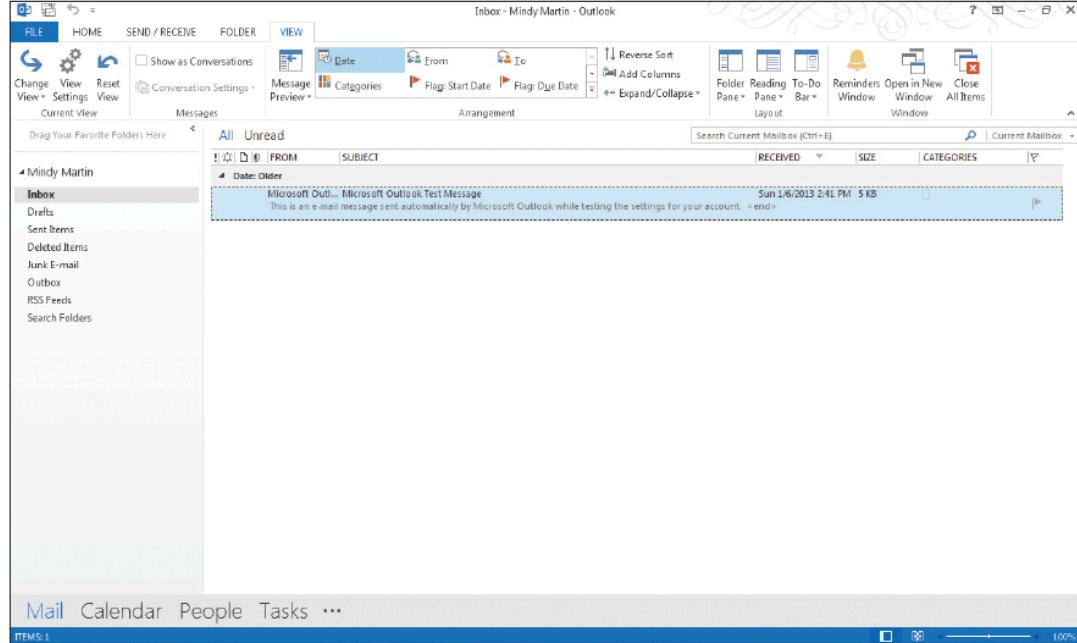
# Step by Step: Change the Reading Pane View

3. Select the **Bottom** option. The Reading Pane is displayed horizontally, across the bottom of the message viewing area. If you have any emails in your mailbox, you'll see a preview of the message contents in the Reading Pane, as shown below.



# Step by Step: Change the Reading Pane View

4. On the **VIEW** tab, click the **Reading Pane** button in the Layout group.
  5. Select the **Off** option. The Reading Pane is hidden, as shown at right.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.



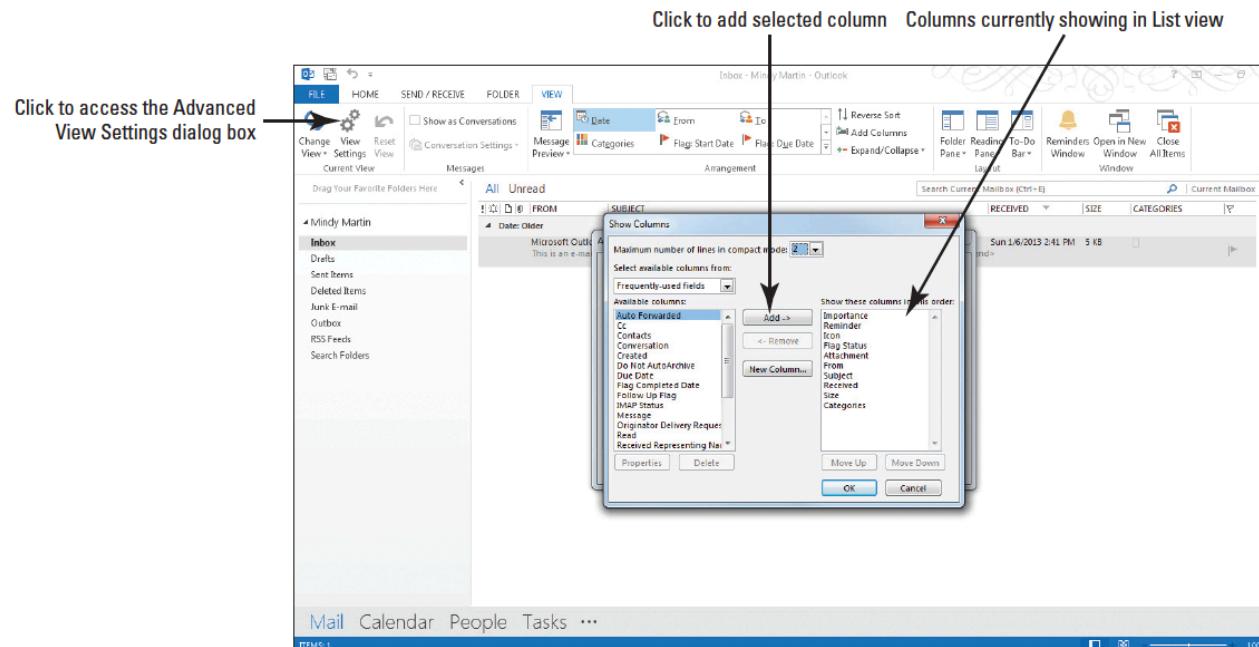
# Step by Step: Show or Hide Fields in a List View

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- **GET READY. LAUNCH** Outlook if it is not already running and **insure** that it shows the mailbox with the Reading Pane hidden.
  1. Click the **VIEW** tab and then click **the Change View**.
  2. Select **Preview** from the Change View gallery.
  3. Click **View Settings** to open the Advanced View Settings: Preview dialog box.

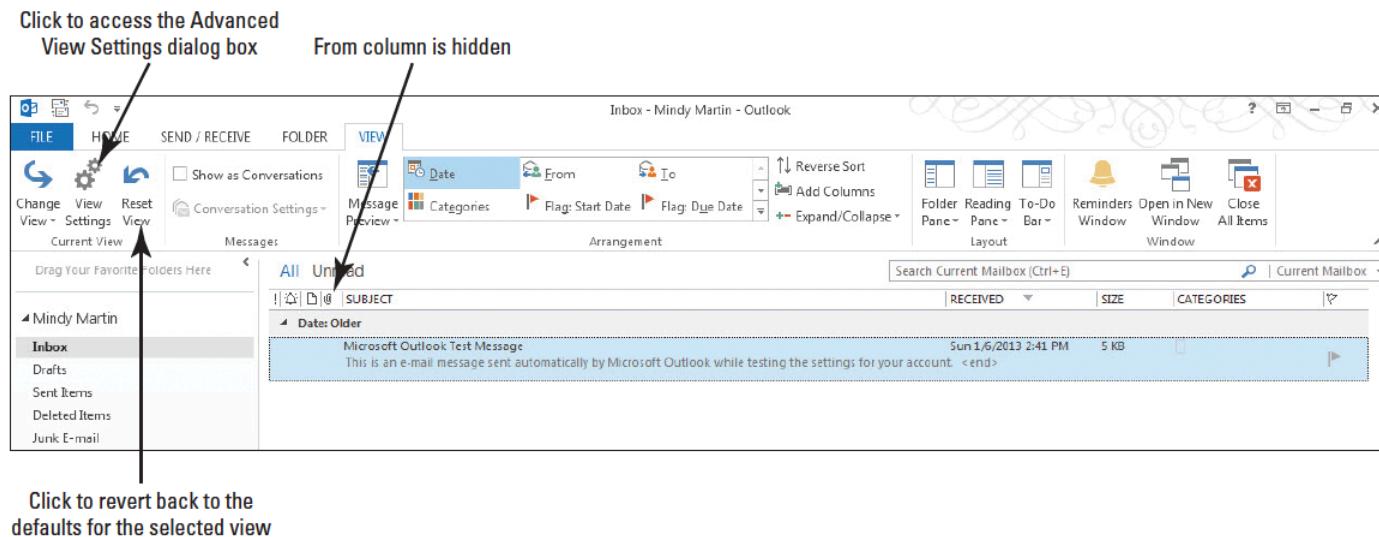
# Step by Step: Show or Hide Fields in a List View

4. Click **Columns**. The Show Columns dialog box opens listing all of the available columns, as shown below.
5. Select **From** in the *Show these columns in this order* box-, and then click the **Remove** button.



# Step by Step: Show or Hide Fields in a List View

6. Click **OK** twice to apply your changes and close the dialog boxes. The column changes have been applied to the mailbox, as shown below. Notice that the From column no longer appears.
7. Click the **View Settings** button, then click **Columns** in the Advanced View Settings: Preview dialog box.



# Step by Step: Show or Hide Fields in a List View

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8. Select **From** in the Available Columns box on the left of the dialog box and click the **Add** button. Notice that the **From** column is at the bottom of the *Show these columns in this order* list, meaning that it will appear at the far right column in Preview view list.
9. Click the **Move Up** button below the list repeatedly until the **From** column appears at the top of the list.
10. Click **OK** twice to apply your changes and close the dialog boxes. The **From** column is visible again, but is located at the far left of the column headers.

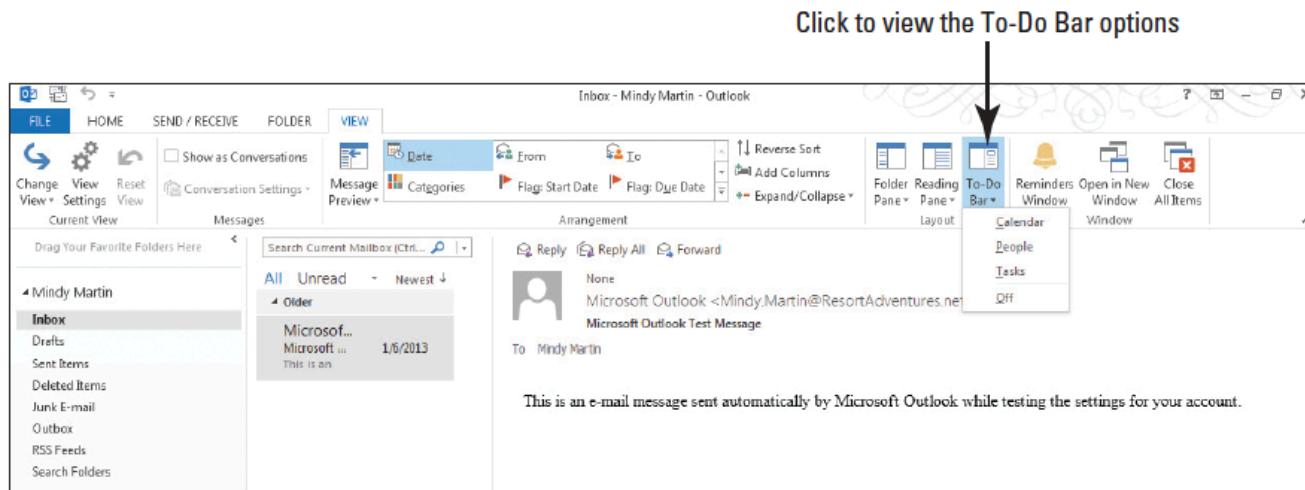
# Step by Step: Show or Hide Fields in a List View

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11. Click **Change View** in the Current View group on the VIEW tab.
  12. Click **Compact** at the prompt to restore the mailbox to the default view.
  13. Click **Reset View** in the Current View group on the VIEW tab.
  14. Click **Yes** at the prompt to restore the mailbox to the default view.
  15. Click the Reading Pane dropdown button and select Right.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

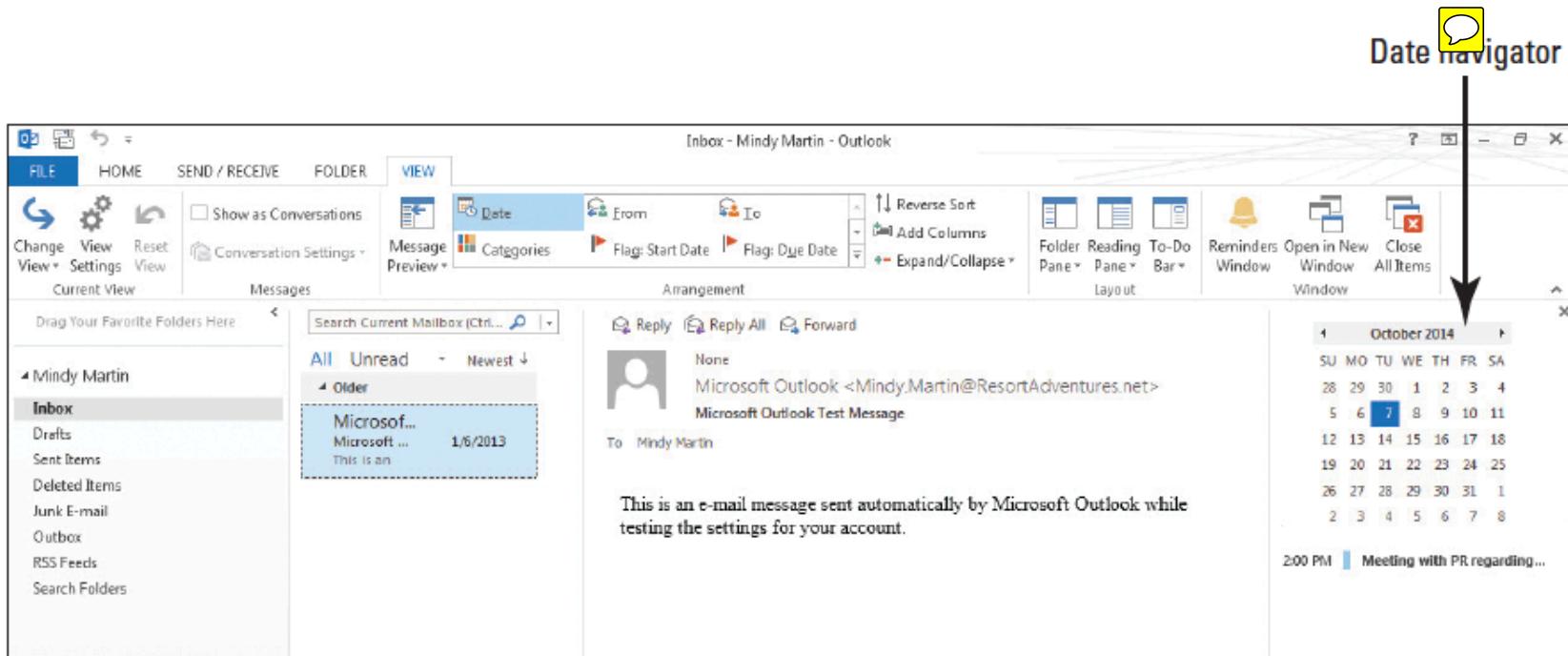
# Step by Step: Customize the To-Do Bar

- **GET READY. LAUNCH** Outlook if it is not already running.
  1. If necessary, click the **Mail** button in the Navigation bar to display the default mailbox view. By default, the To-Do Bar is not displayed.
  2. Click the **VIEW** tab, and then click the **To-Do Bar** button. The To-Do Bar options are displayed, as shown below.



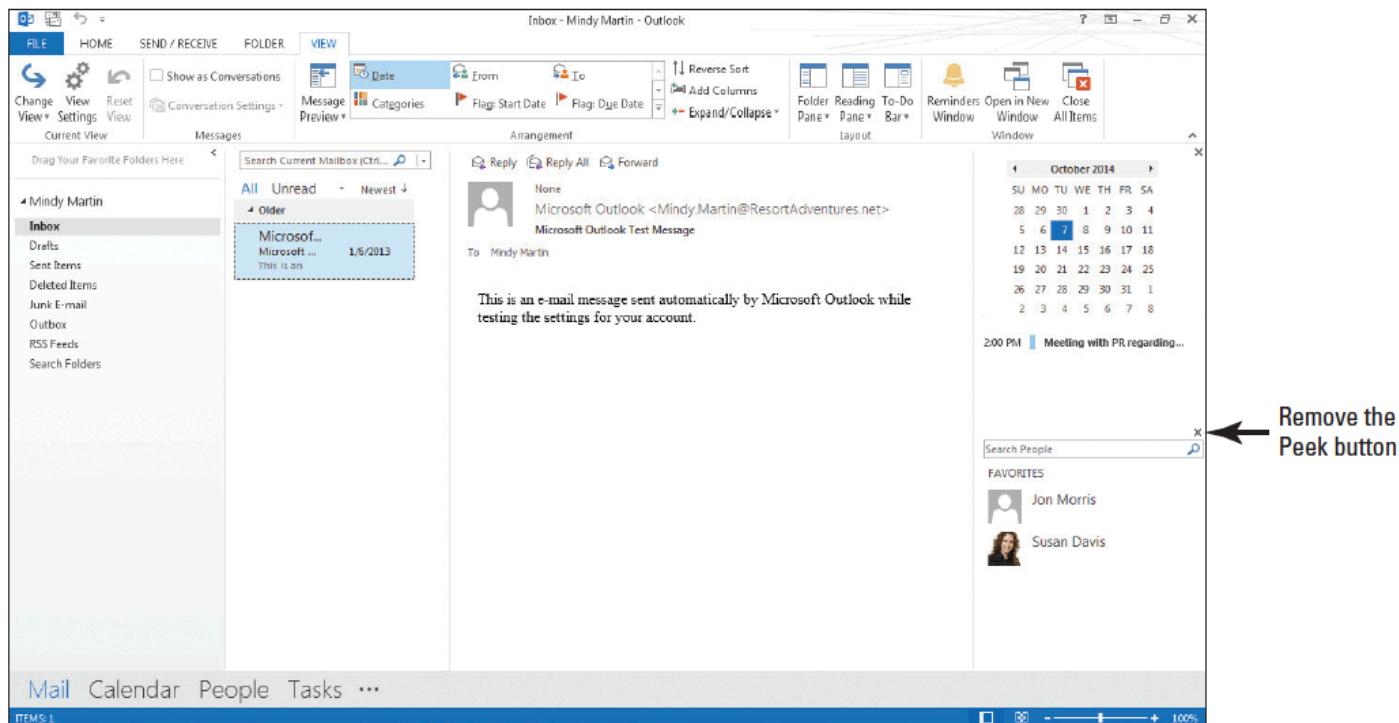
# Step by Step: Customize the To-Do Bar

3. Click **Calendar**. The To-Do Bar appears on the right of the Outlook window. The Date Navigator is shown in the top half, as shown below.



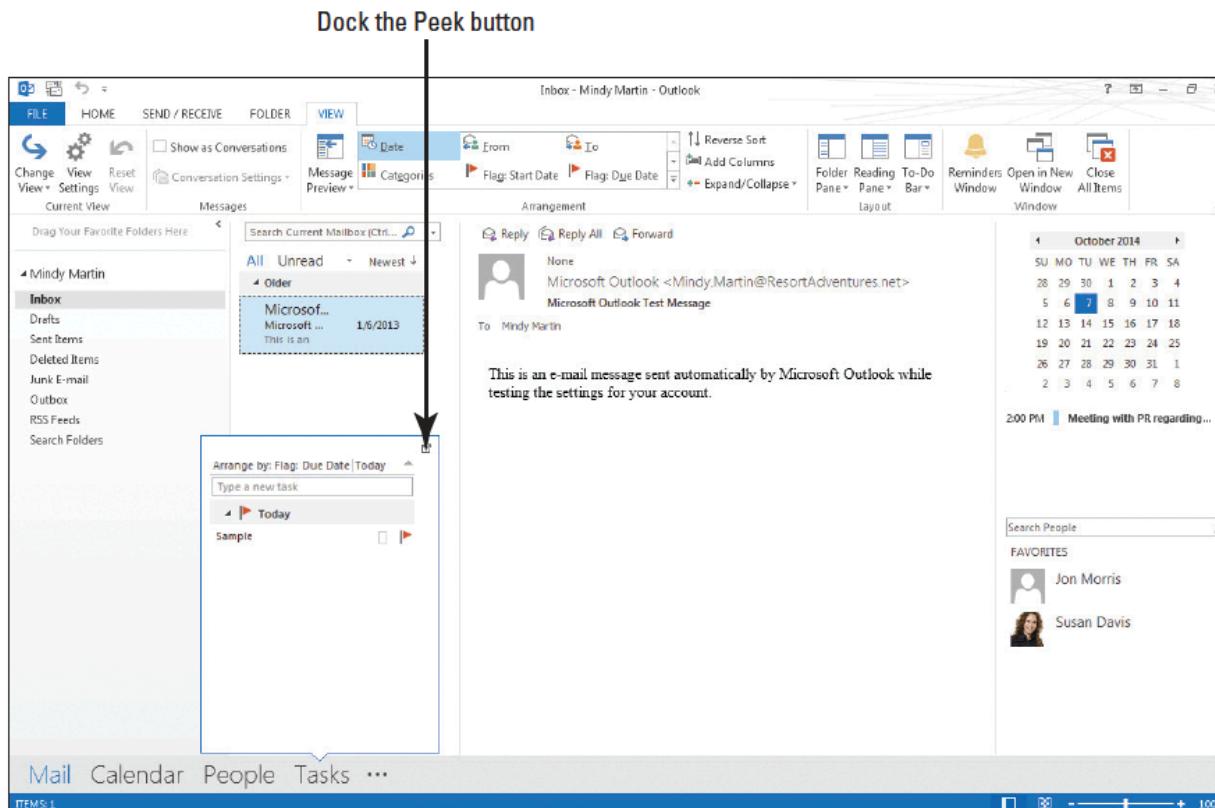
# Step by Step: Customize the To-Do Bar

4. Click the **To-Do Bar** button and click **People**. A People section is added to the lower half of the To-Do Bar, as shown below.



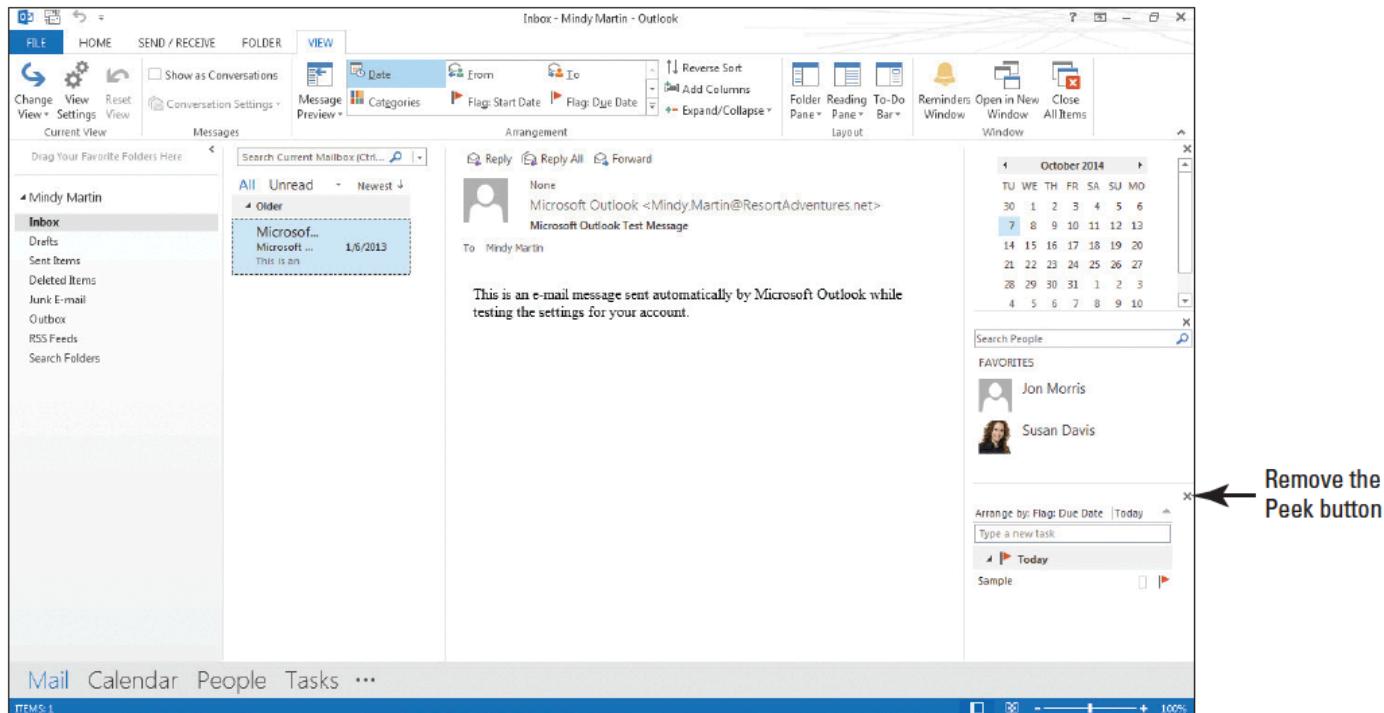
# Step by Step: Customize the To-Do Bar

5. Hover the mouse over the **Tasks** button in the Navigation bar, as shown below.



# Step by Step: Customize the To-Do Bar

6. Click the **Dock the peek** icon in the upper right corner of the Task Peek. The Task section is added to the To-Do Bar, as shown below.



# Step by Step: Customize the To-Do Bar

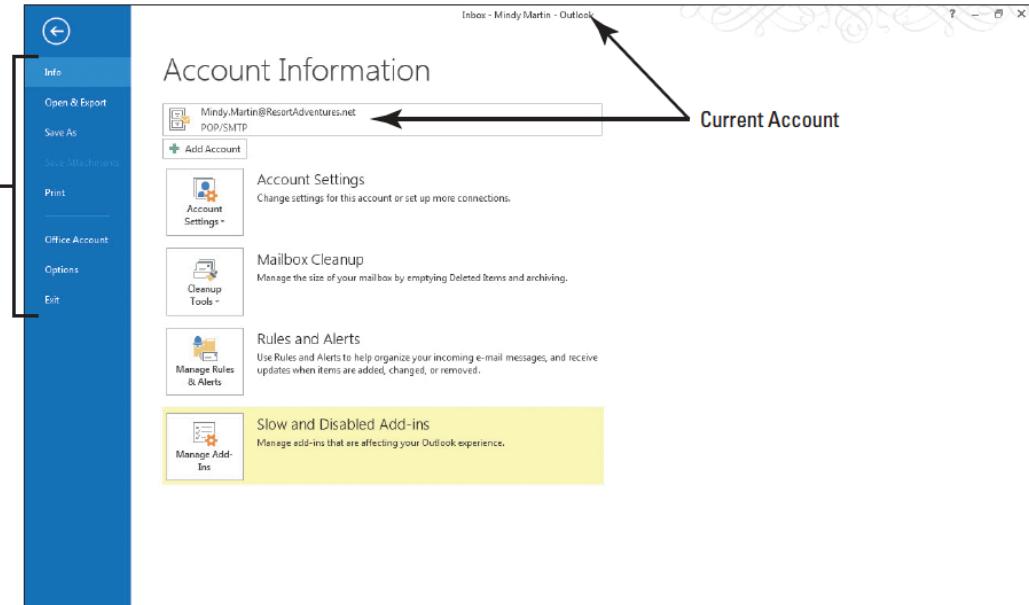
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7. Click the **Remove the Peek** button (X) at the top of the People section of the To-Do Bar to remove the People section.
  8. Click the **VIEW** tab, click the **To-Do Bar** button, and select the **Off** option.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

# Step by Step: Use the FILE Tab to Open Backstage View

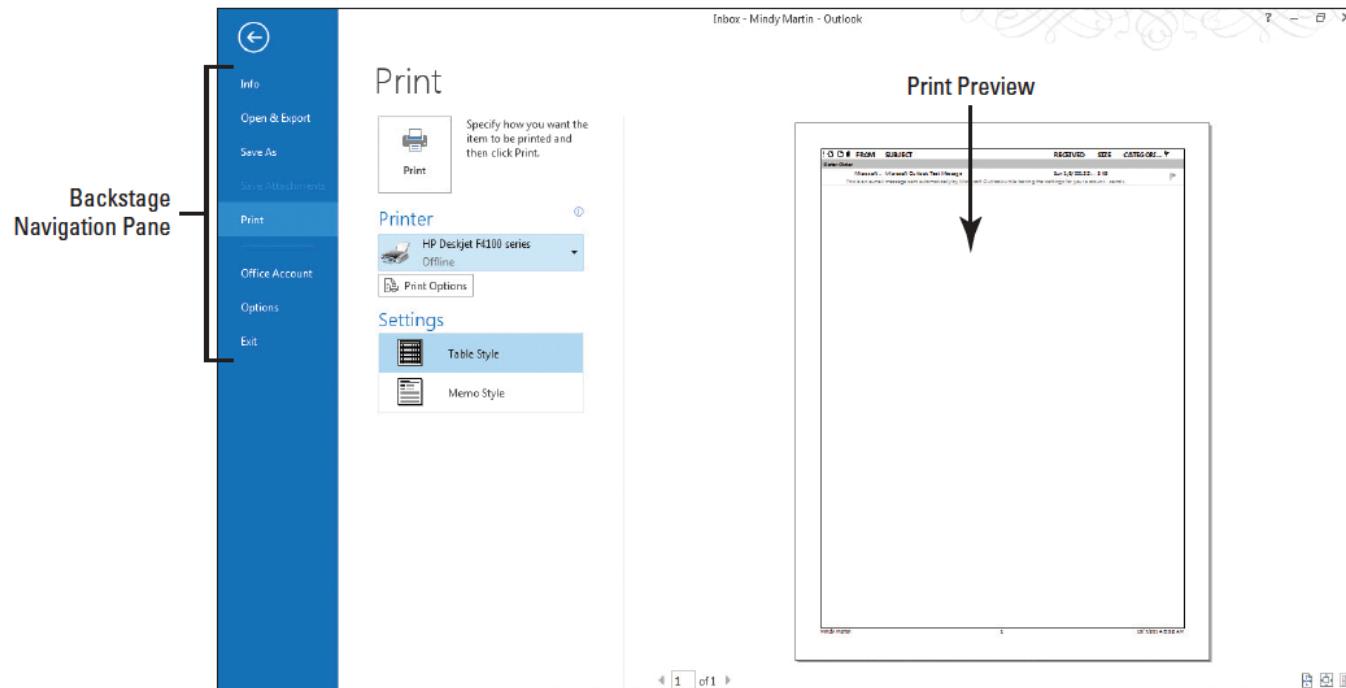
- **GET READY. LAUNCH** Outlook if it is not already running.

1. In the Outlook window, click the **Microsoft Outlook Test Message** and then click the **FILE** tab. This opens the Backstage view with the Info page active, as shown above. The Info page includes information about your account and tools for maintaining your mailbox.



# Step by Step: Use the FILE Tab to Open Backstage View

2. Click **Print** in the left Navigation Pane. The Outlook Print page opens, and a preview appears in the right Preview pane, as shown below.



# Step by Step: Use the FILE Tab to Open Backstage View

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3. Click the **Table Style** command in the Settings area and then the Memo Style. Notice how the preview changes.
  4. Click the **Back arrow** icon at the top left corner of the Backstage view to return to the Inbox.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

# Step by Step: Set General Options

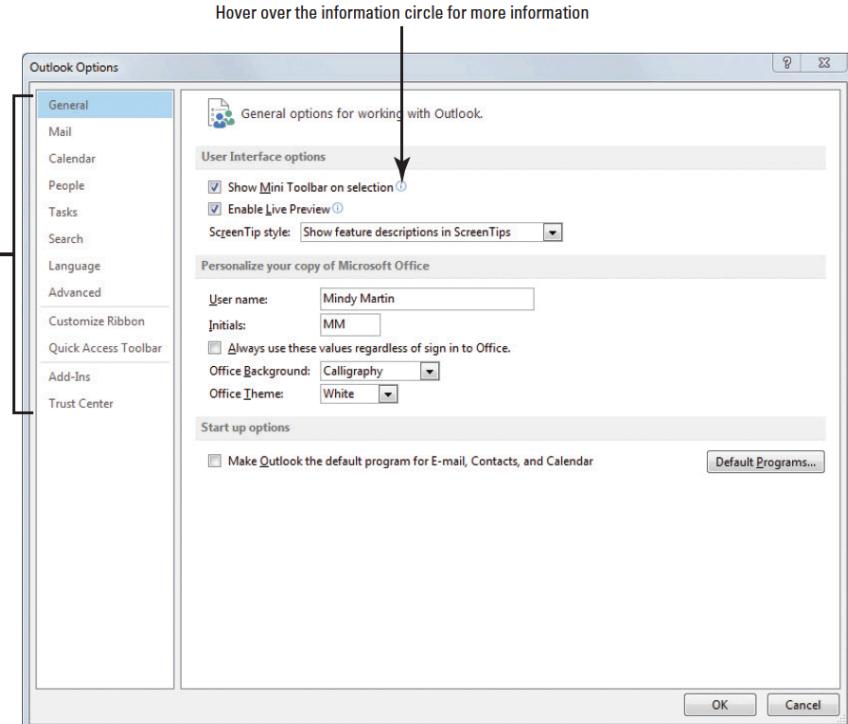
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- **GET READY. LAUNCH** Outlook if it is not already running.
  1. In the Outlook window, click the **Microsoft Office Test Message** and then click the **FILE** tab. This opens the Backstage view, with the Info page active.
  2. Click **Options** in the Navigation Pane. Outlook returns to the **Inbox** and the Outlook Options dialog box opens to the General Options page.

# Step by Step: Set General Options

3. Key your name in the **User Name** box and your initials in the **Initials** box to personalize Outlook, as shown at right. When you personalize Outlook in Backstage view, your name will automatically be added to every Outlook item you create.

Each item in the Options Navigation Pane opens an entire page of associated settings you can customize



# Step by Step: Set General Options

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4. In the *Personalize your copy of Microsoft Office* area, click the **Office Theme** dropdown arrow and select **Dark Gray**.
  5. Click **OK**. Outlook applies the color to the Outlook window.
  6. Click the **FILE** tab. This opens the Microsoft Office Backstage again.
  7. Click **Options** in the Navigation Pane. The Outlook Options dialog box opens to the General Options page.
  8. In the *Personalize your copy of Microsoft Office* area, click the **Office Theme** dropdown arrow and select **White**.
  9. Click **OK**. This will restore the default color to the Outlook window.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

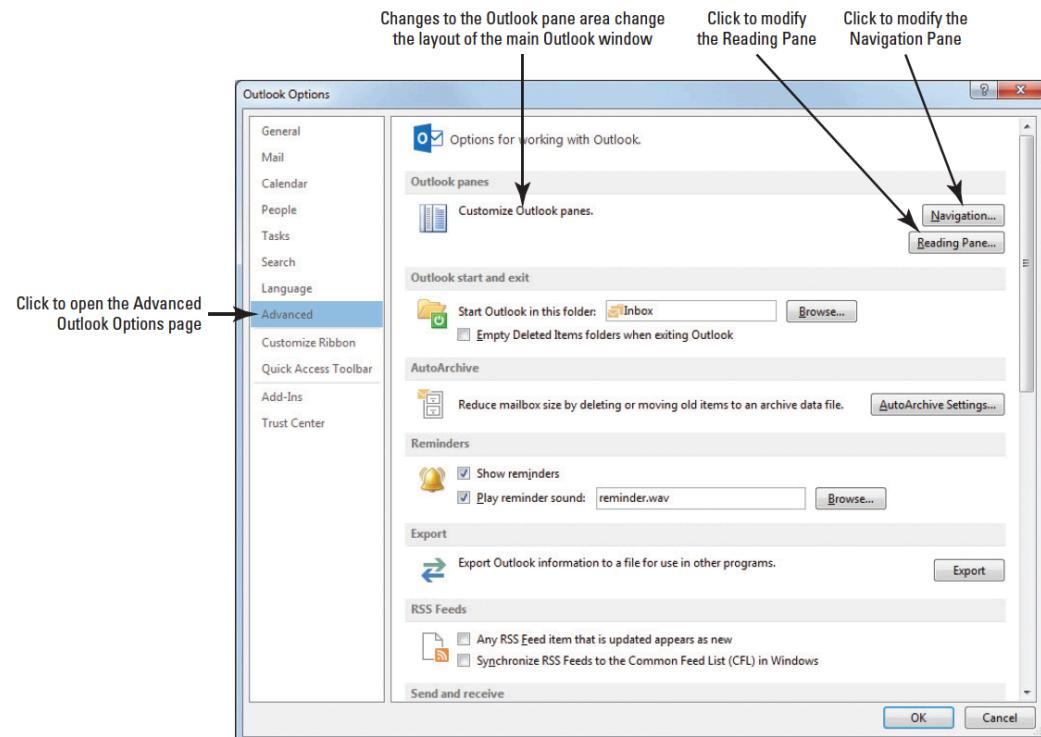
# Step by Step: Set Advanced Options

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- **GET READY. LAUNCH** Outlook if it is not already running.
  1. Click the **FILE tab** and then select **Options** in the Backstage Navigation Pane. Outlook returns to the **Inbox** and the Outlook Options dialog box opens to the General Options page.

# Step by Step: Set Advanced Options

2. Click the **Advanced** option in the Navigation Pane. The Advanced options page of the Outlook Options dialog box appears, as shown at right.



# Step by Step: Set Advanced Options

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3. Find the first section on the Advanced page called the Outlook panes area. In this section, click the **Navigation** button. The Navigation Options dialog box appears. This is the same dialog box that we opened from the Navigation bar.
4. With the **Mail** option highlighted, click the **Move Down** button two times, then click **OK**. Notice that the Mail button on the Navigation bar at the bottom of the screen is now the third item in the list.
5. Click the **Navigation** button again. The Navigation Options dialog box reappears.
6. Click **Reset** and then **OK** to restore the default arrangement.

# Step by Step: Set Advanced Options

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7. Click the **Reading Pane** button. The Reading Pane dialog box reappears.
  8. Review the options available. Click **Cancel**.
  9. Scroll down, reading each of the available options. When you get to the *Send and receive* area, deselect the **Send immediately when connected** option. This change means that you need to manually tell Outlook when you're ready to send and receive messages.
  10. Click **Cancel**. This will restore the default layout and settings.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

# Step by Step: Set Language Options

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- **GET READY. LAUNCH** Outlook if it is not already running.
  1. Click the **FILE tab** again and select **Options** and then **Language**. The Language options page of the Outlook Options dialog box appears.
  2. Click the **[Add additional editing languages]** box in the Choose Editing Languages area of the dialog box. A long list of available languages appears.
  3. Scroll down the list and select **Spanish (United States)**.
  4. Click **Add**. Outlook adds the language to the Editing Language list, which turns on all of its proofing tools for that language.

# Step by Step: Set Language Options

5. You can use the *Choose Display and Help Languages* area to change the language that appears onscreen in ScreenTips and in the Help window.

In the Display Language window, select

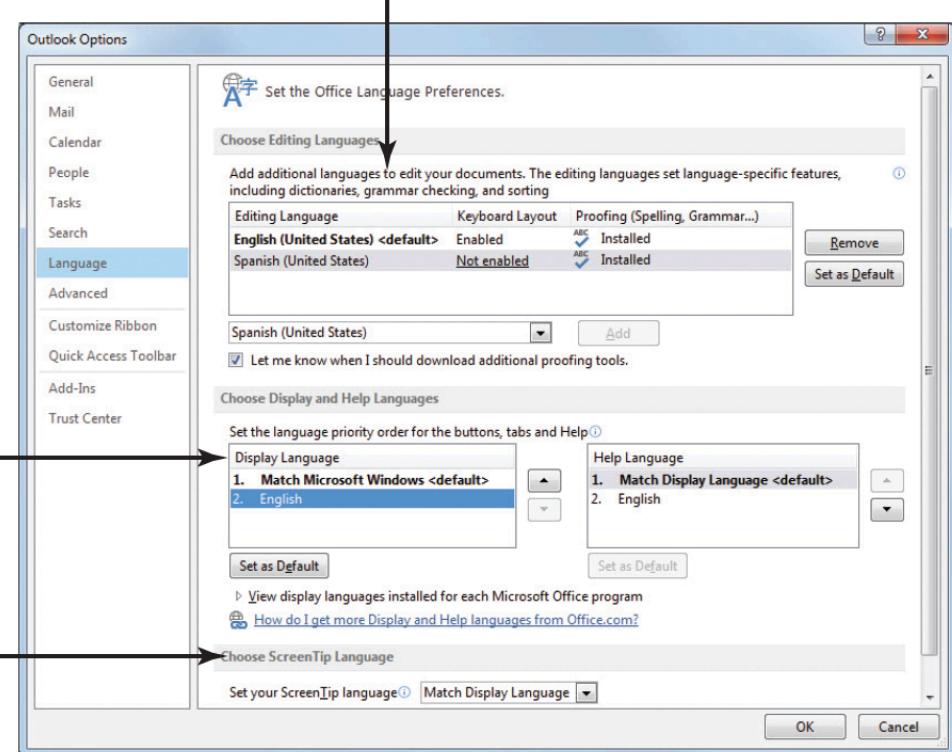
**English**, if necessary.

Your screen should look like the figure at right.

Changing the Display Language changes the language of Menus and onscreen 

Changes the ScreenTip Language 

Changing the Editing Language changes the proofing tools that Outlook uses to check your writing



# Step by Step: Set Language Options

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6. Click **Cancel**. Outlook will restore the default language

 options and return you to the main window.

- **PAUSE. LEAVE** Outlook open to use in the next exercise.

# Skill Summary

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Skills	Exam Objective	Objective Number
Starting Outlook		
Working in the Outlook Window	Configure views	1.1.5
Personalizing Outlook	Customize the Navigation Pane	1.1.3
Using Backstage View	Set Outlook options	1.1.7