



Detailed Guide to Office 2010 - Outlook

In our day to day activities, we often think of Outlook as just a way to send and receive email, but it is really so much more. If fully utilized, it can be one of the most important time-management tools in your arsenal of software.

The purpose of this document is to share in greater detail how Outlook can be used to improve efficiencies in your day to day routine. By design, this guide can be used as a **replacement** for the Windows 7 and Microsoft Office 2010 Quick Start Guide section for ***“Microsoft Outlook 2010”*** and the Outlook-related pieces of ***“Microsoft Office 2010 – Common Features”***. Most of the quick start text is duplicated in this document, but it does expand upon the discussion of the new and enhanced functionality, as well as providing tips to make the overall conversion experience more satisfying.

This document can also serve the dual purpose of acting as a FAQ resource. The Table of Contents has been set up primarily as a “How To”. It is our hope that you will find this document to be a beneficial learning tool and Help guide, in addition to a useful trouble shooting guide.

Finally, you will also find additional links to Microsoft training or quick reference guides that are not available in the Quick Start. These links provide you with more in-depth knowledge of the Microsoft Outlook 2010 than the casual user generally wants to know.

We hope you find this guide to be useful as you dig deeper into the many features and functions of Outlook 2010.

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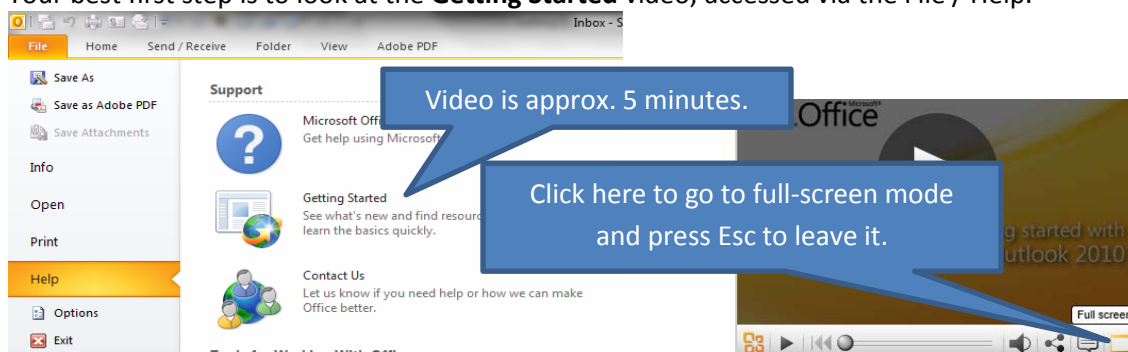
Additional Resources

[Outlook Quick Reference Card](#)

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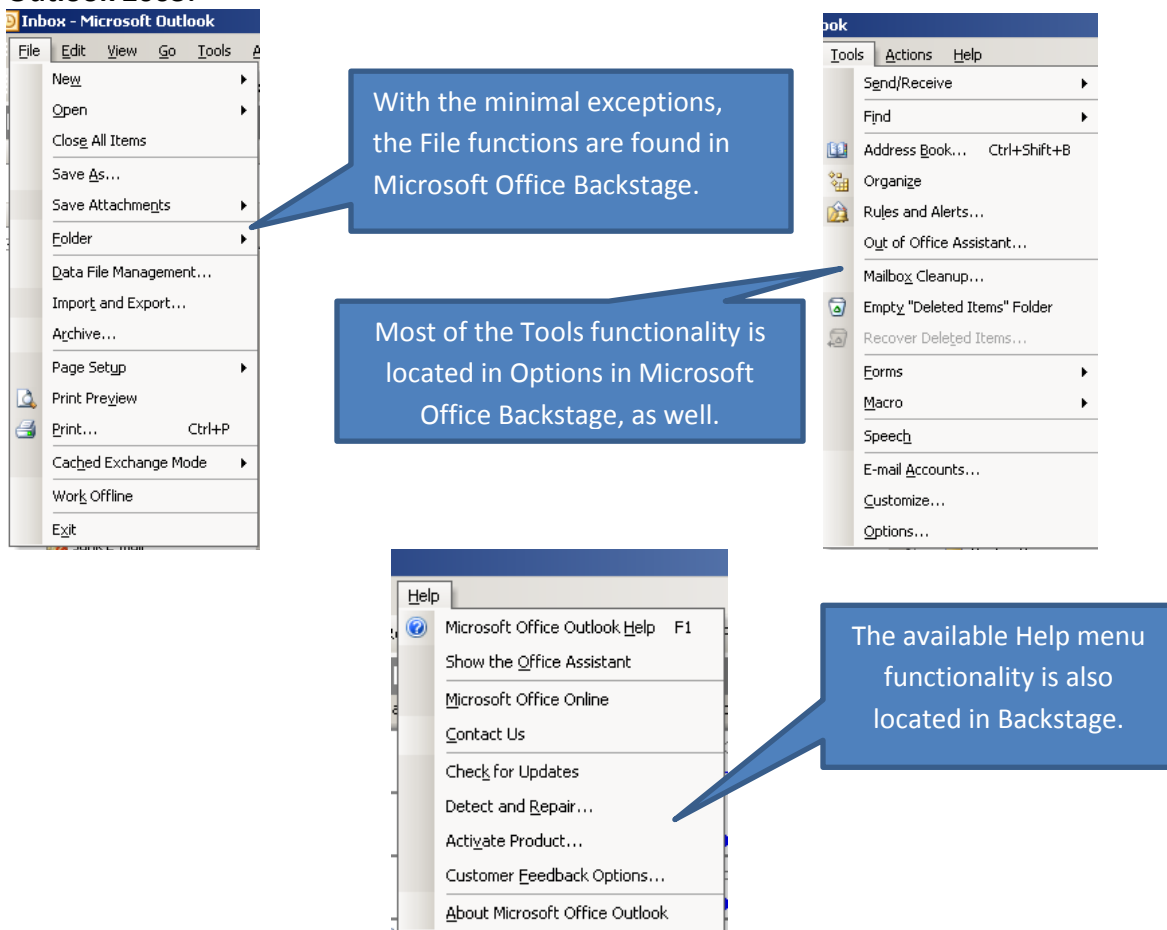
Microsoft Outlook 2010

1. Your best first step is to look at the **Getting Started** video, accessed via the File / Help.

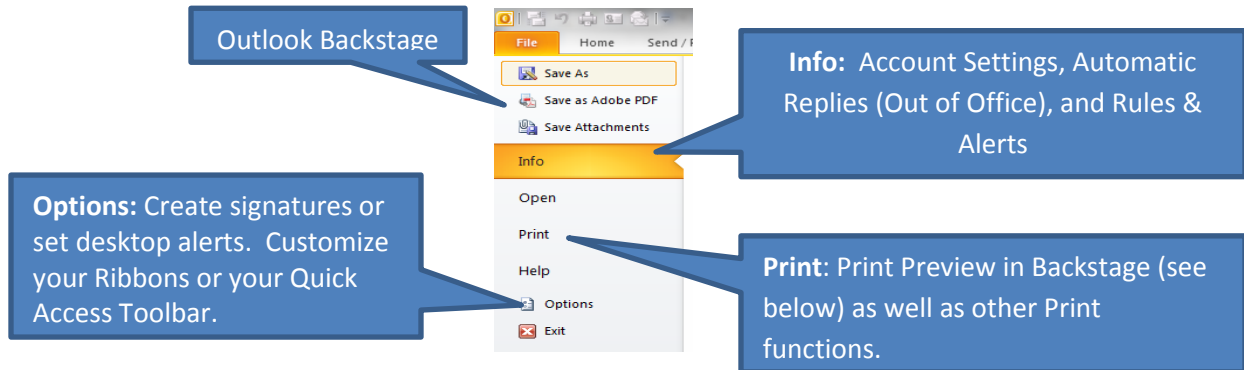


2. **Microsoft Office Backstage (Outlook)** – This refers to the tab labeled **File** on each of your Microsoft Office products and is basically where you will manage your files, as it primarily contains most components from the Office 2003 File and Tools menu options. It would be **to your advantage** to take a few minutes to become familiar with this screen.

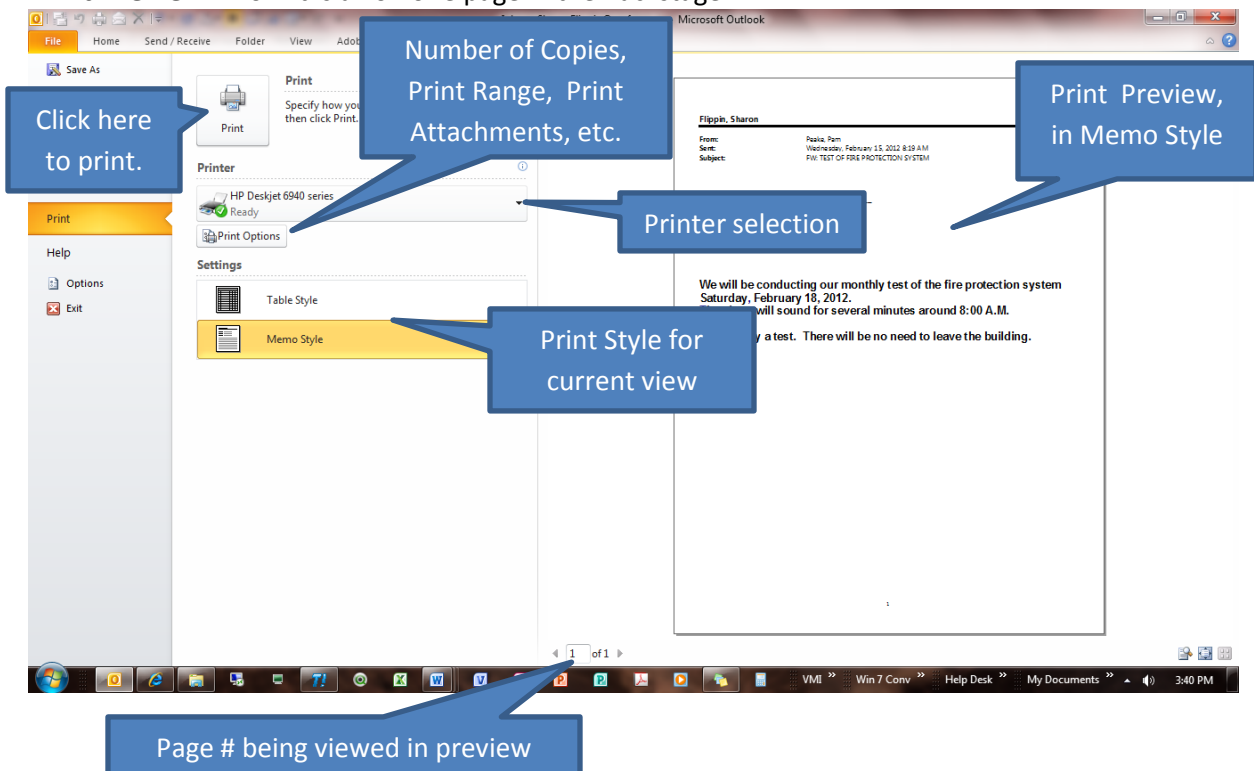
Outlook 2003:



Outlook 2010:

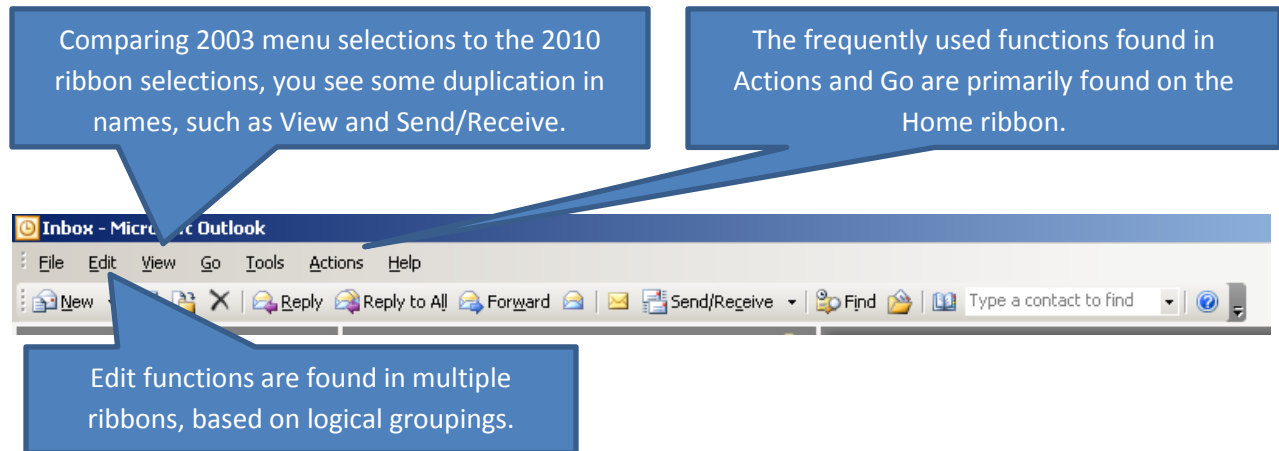


Print Preview: Now it is all on one page in the Backstage.



3. **Ribbons** – Ribbons and Backstage replace the functionality of your Outlook 2003 Toolbar selections, including Menu Bar.

Outlook 2003:



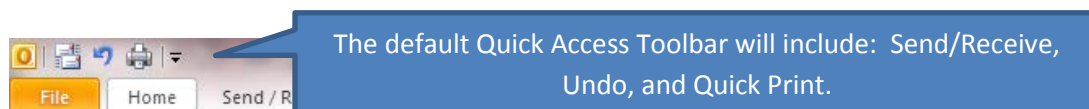
Outlook 2010:



As noted above, the File (Backstage) option contains what you need to manage your Outlook files.

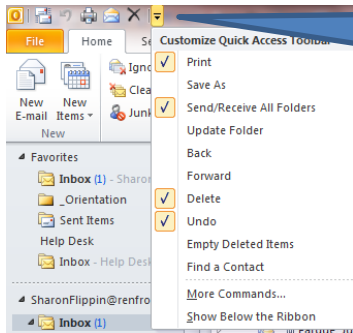
Ribbon Tip: Outlook ribbons will change, based on the functionality being used, just as your menu options changed in Outlook 2003. Even within the same functional area, such as Mail, the ribbons will vary, depending on whether you are reading mail, sending mail, or working in your Navigation or To-Do Bar panes.

4. **Quick Access Toolbar** – As you review Outlook's many ribbons, you may find a frequently used function located on a ribbon other than Home. If it is truly frequently used, you may want to consider adding it to the Quick Access Toolbar. Your starting point Quick Access Toolbar for your Outlook Mailbox is as follows:



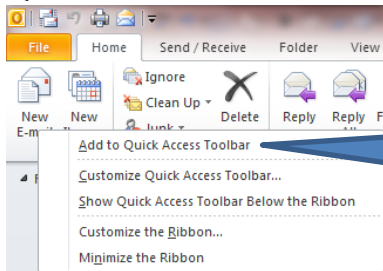
To add functions to your Quick Access, use one of the following steps.

Quick Access – Easiest:



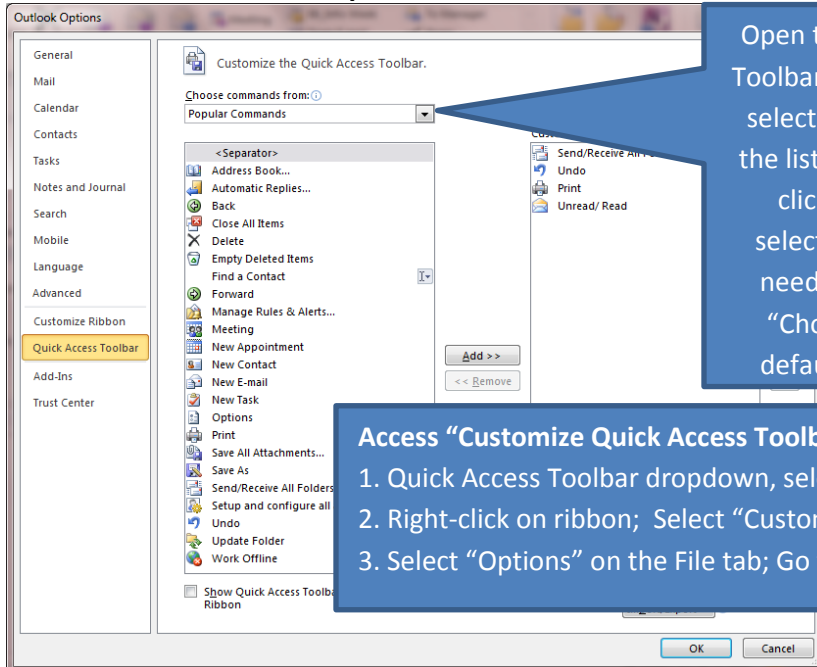
To set from the Quick Access Toolbar: Left-click on the down arrow and select from list by simply clicking on the command. (If a desired items is not on the list, click “More Commands” or do one of the following.)

Quick Access – Next Easiest:



If the command is not in the drop down box above, but you know where it is located on the ribbon, simply right-click on the item on the ribbon and select “Add to Quick Access Toolbar”.

Quick Access – Detailed Option:

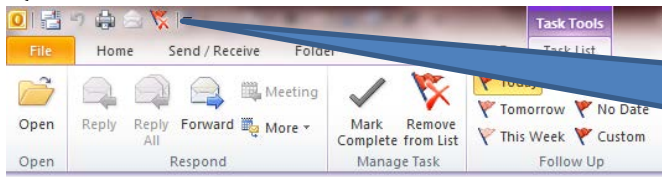


Open the “Customize Quick Access Toolbar” in any number of ways and select the desired command from the list to the left by either double-click or by highlighting it and selecting “Add”. **Note:** May need to change selection under “Chose commands from:” as it defaults to Popular Commands.

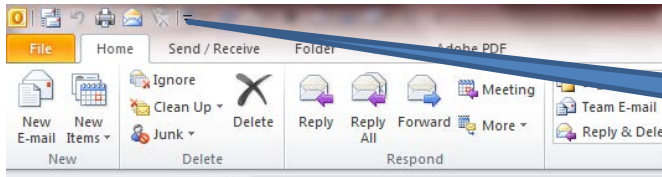
Access “Customize Quick Access Toolbar” by:

1. Quick Access Toolbar dropdown, select “More Commands”
2. Right-click on ribbon; Select “Customize Quick Access Toolbar”
3. Select “Options” on the File tab; Go to Quick Access Toolbar

Quick Access – Final Notes:

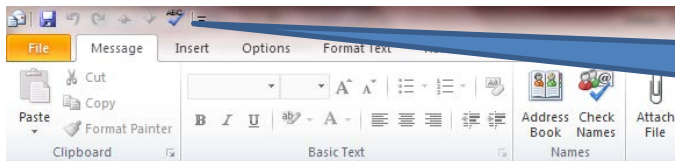


Commands related to a Contextual ribbon, such as Remove from List in Task Tools may be added to the Quick Access Toolbar ...

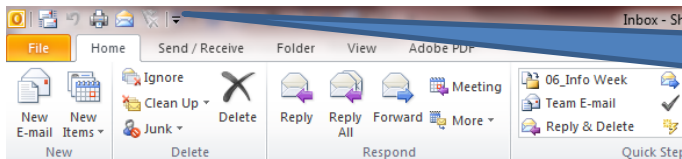


...BUT it will be “grayed out” or disabled, once you leave the associated function.

HOWEVER...



An icon added to a specific functional area, such as New Message, will display as long as you are in that area...

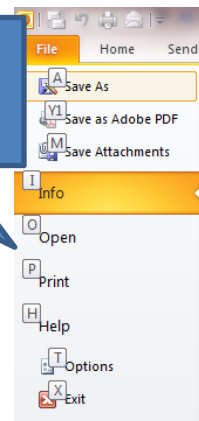


...BUT it will not be displayed at all, once you leave the associated function, as when you go back to your Inbox.

5. **Key Tips** – All you need to remember is to press the **ALT** key and the keyboard shortcuts will be displayed.

When the shortcut letter or number is displayed, just type it to initiate the action, i.e. “F” for File results in...

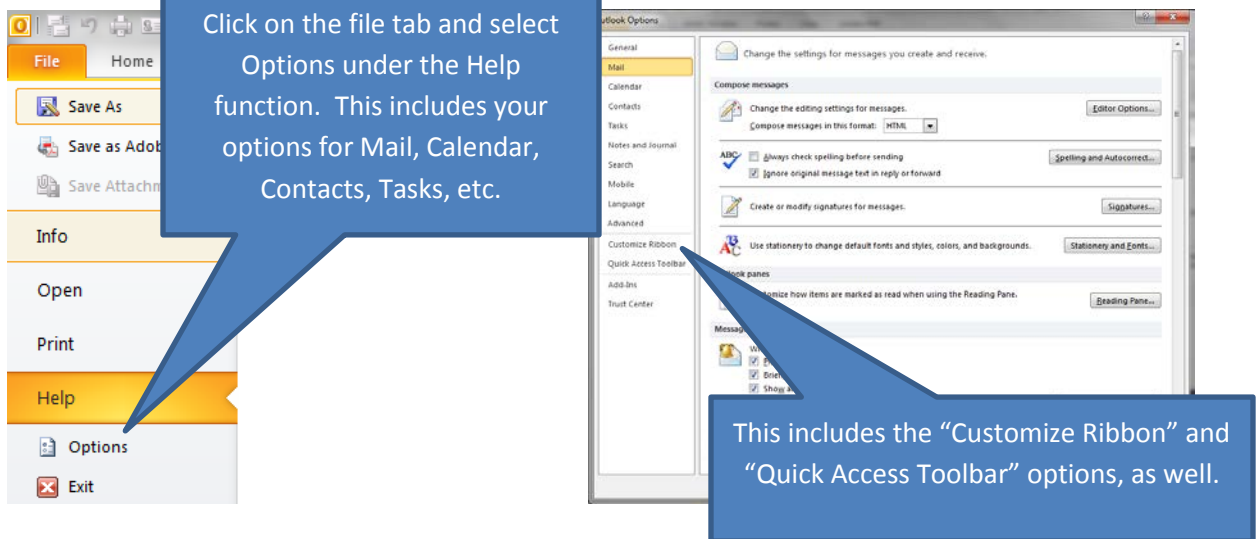
...open File, or Backstage, view, with keyboard shortcuts displayed.



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Outlook Options & Views

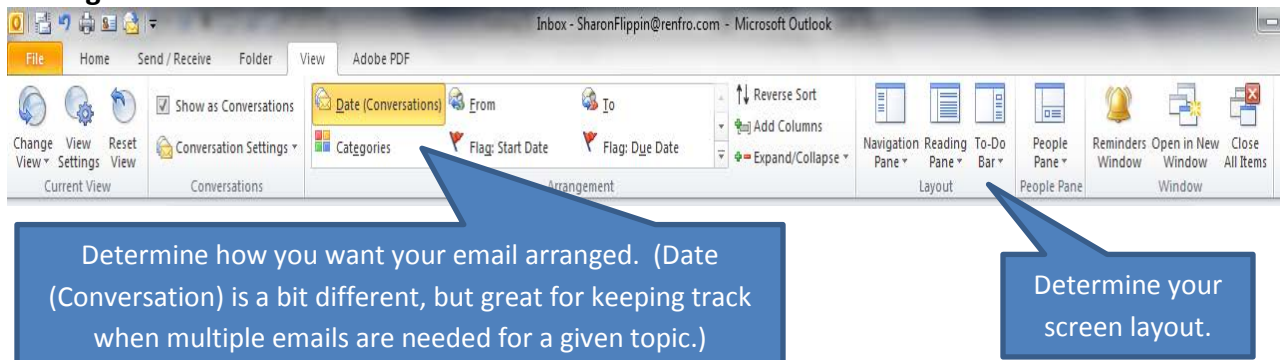
1. Set up your **Outlook Options**, as desired, including Signatures.



2. Determine desired setup for each area that you use regularly.

Mail

Setting Inbox View:

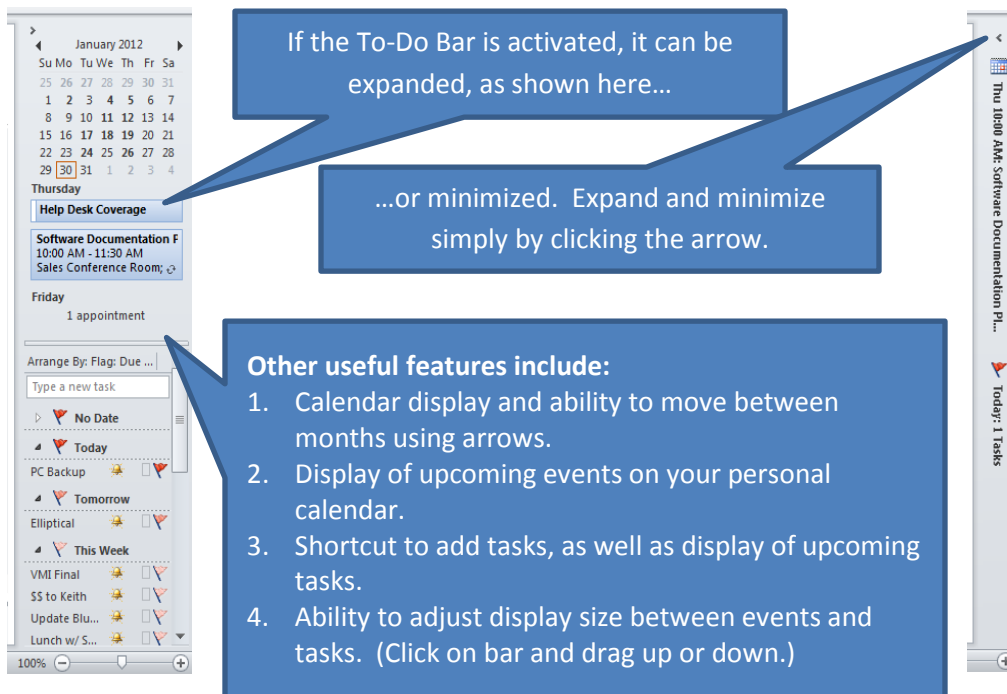


Mail Layout Options:

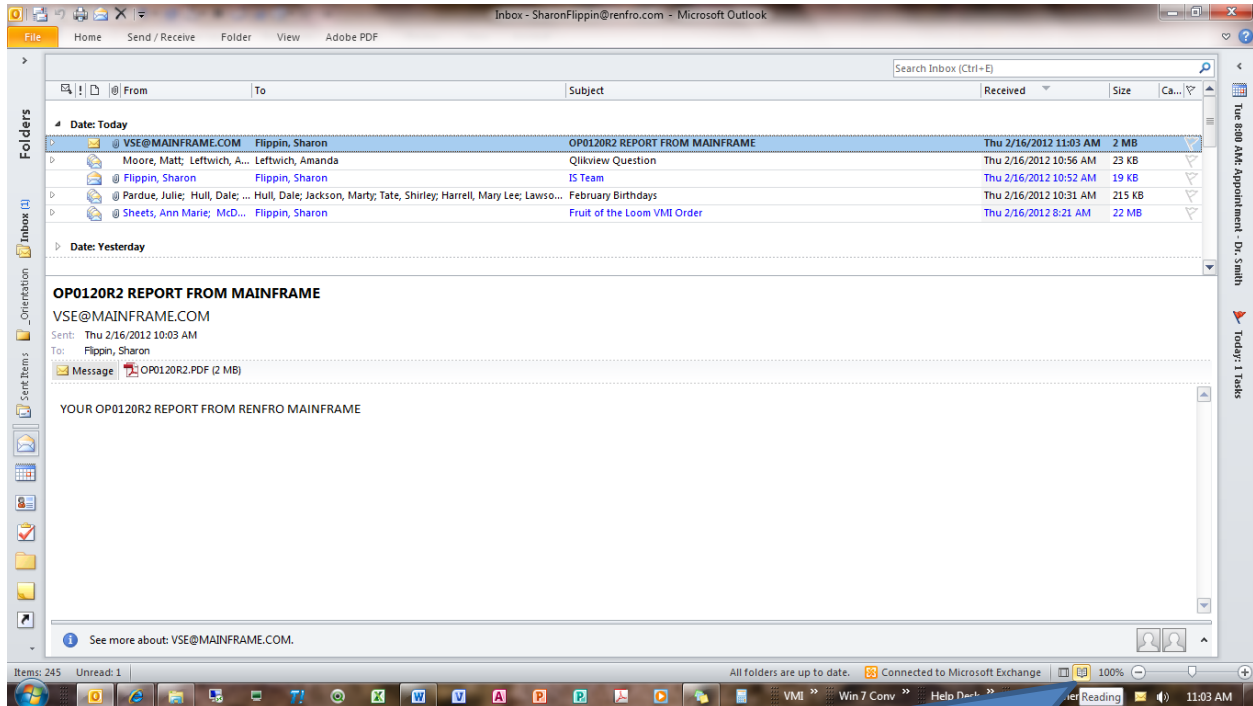
Navigation Pane



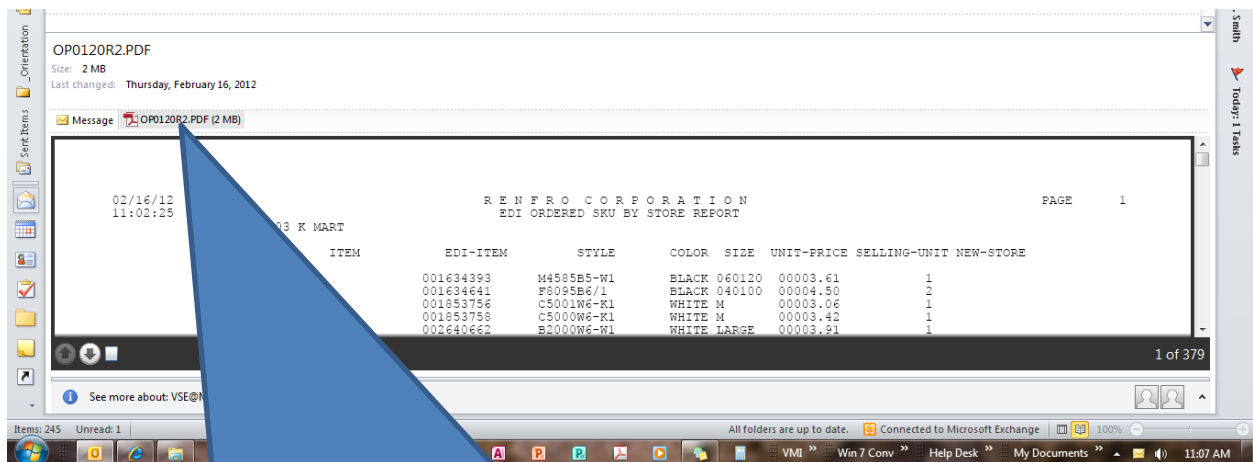
To-Do Bar



Normal View versus Reading Pane



Normal vs. Reading View: Switching from the Normal to Reading view will increase the space used by the Reading pane (if it is turned on) and will minimize the Navigation pane, the To-Do bar, and the Ribbons.

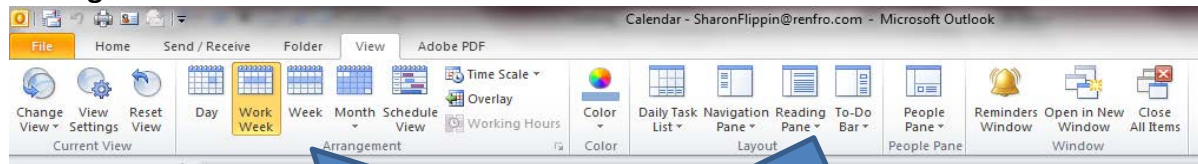


Attachments: An attachment can be viewed directly in the reading pane. A single click will open most documents. Some documents, such as PDFs and TXTs will require the extra step of clicking on Preview file, for security reasons.

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Calendar

Setting Calendar View:

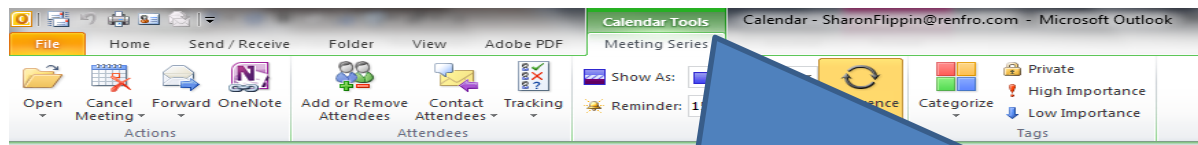


These views are much the same as those in your previous version of Outlook.

As with Mail, you have multiple Layout options, with the same basic functionality.

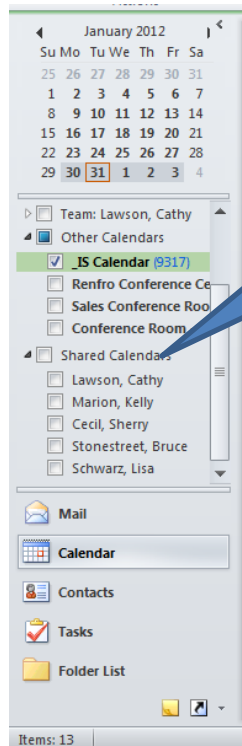
Working with your calendar:

Contextual Ribbon



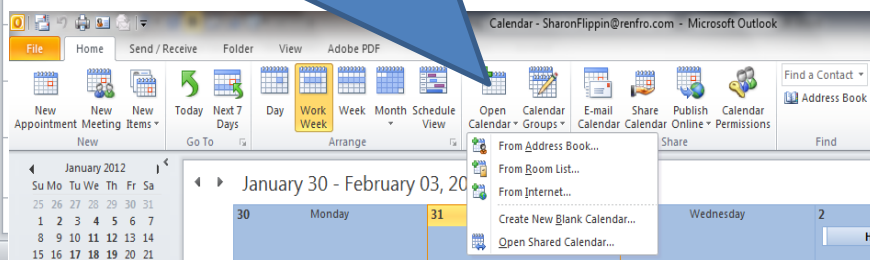
The Calendar Tools ribbon appears when you are working inside the calendar doing functions such as scheduling, cancelling, or changing a meeting. Contextual ribbons are a mainstay in Office 2010 and are easily identified with a colored tab.

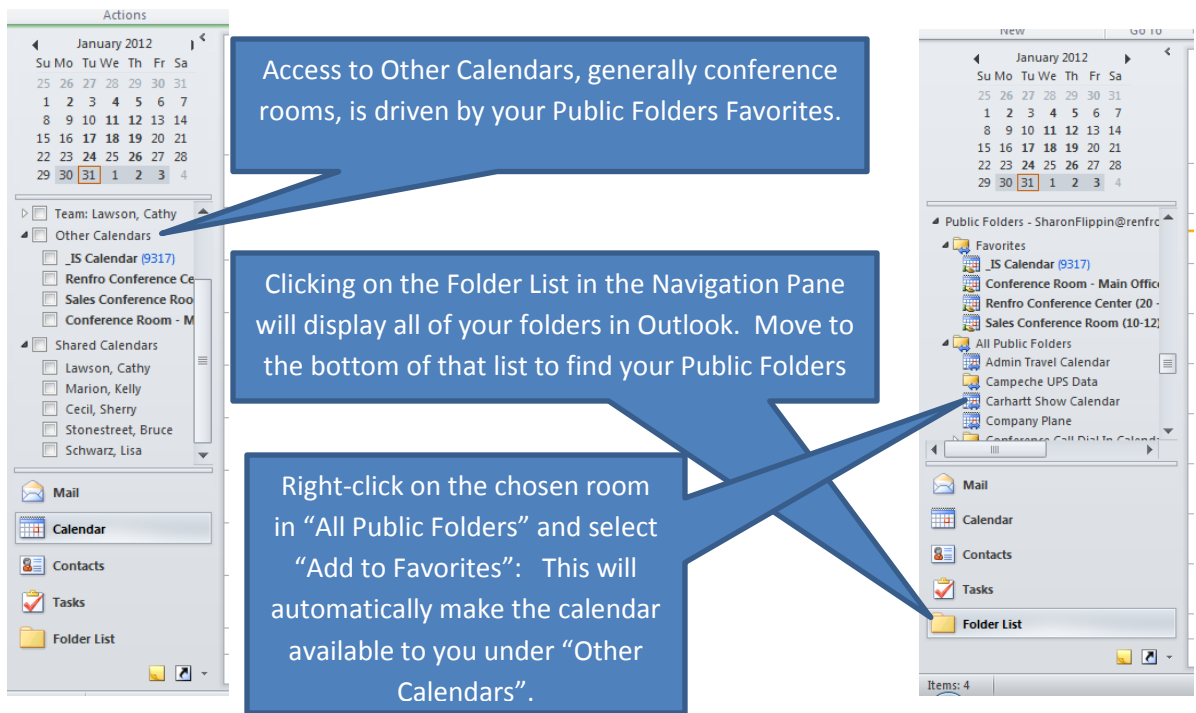
Navigation Pane



Middle section shows you calendars that you can view. To select, simply click inside the checkbox.

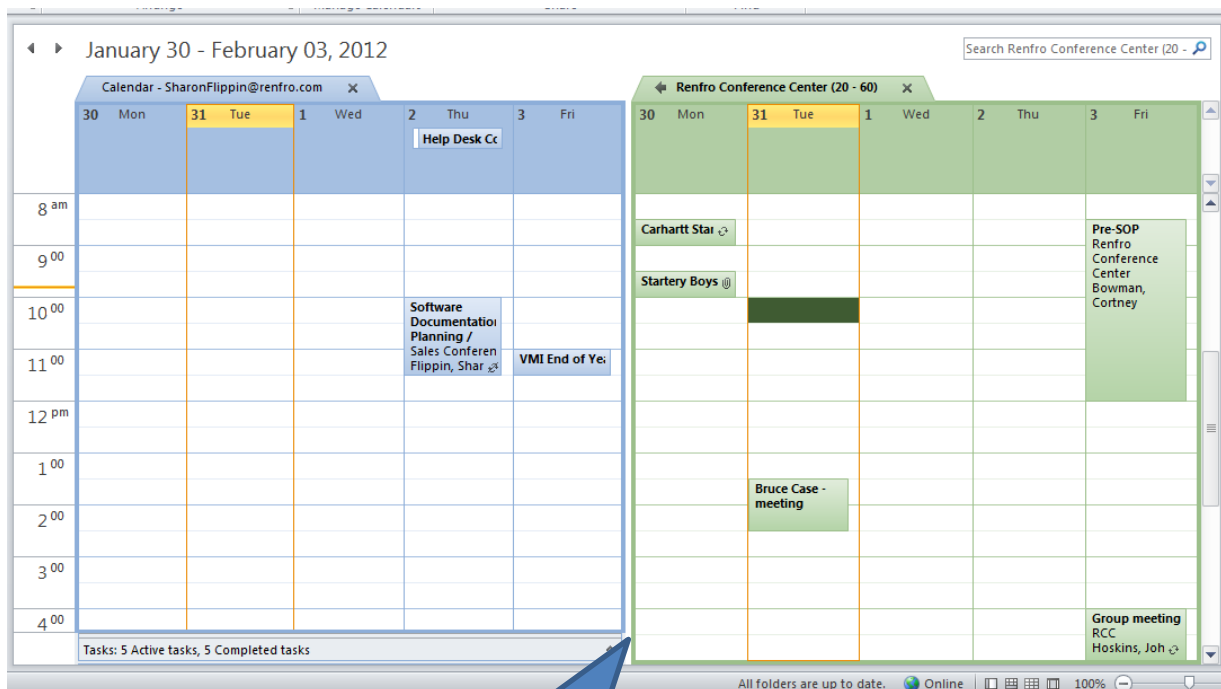
Individuals with shared calendars can be added to your list by clicking on Open Calendars on the Home ribbon and selecting either "From Address Book" or "Open Shared Calendar". They will appear in the Shared Calendar sections.





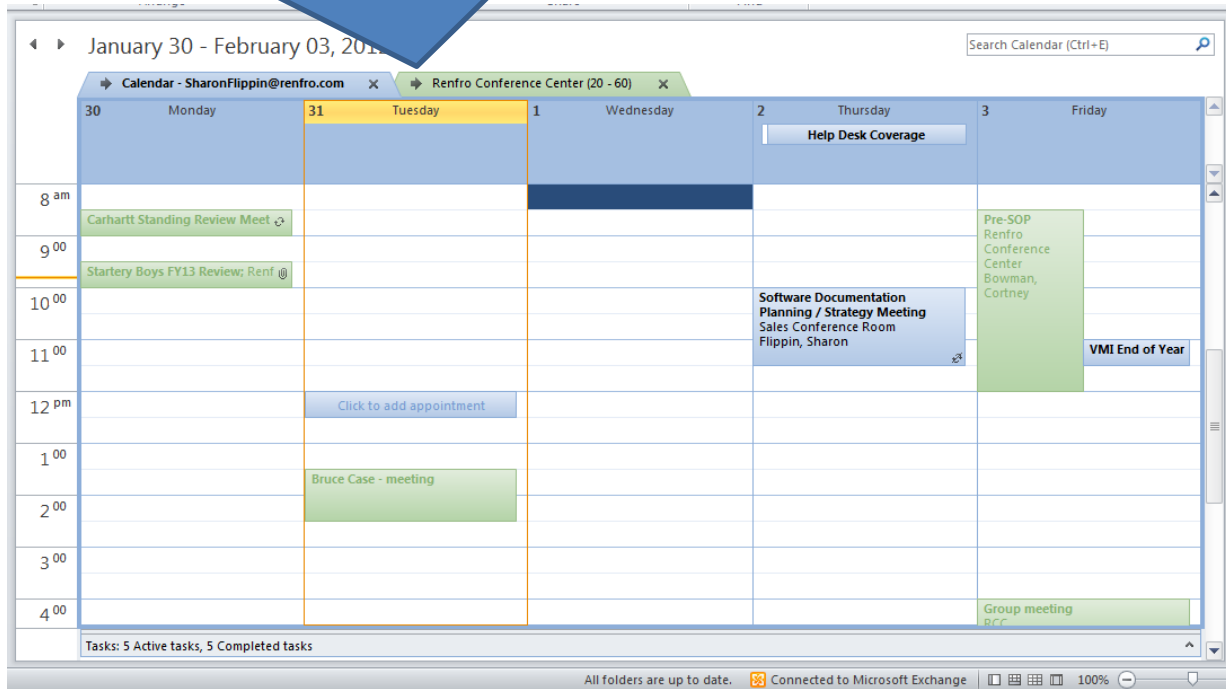
Viewing Multiple Calendars:

For first time setup, you may want to select the View ribbon. While the Home ribbon has much of what you may need for setup, the View ribbon does present additional options.

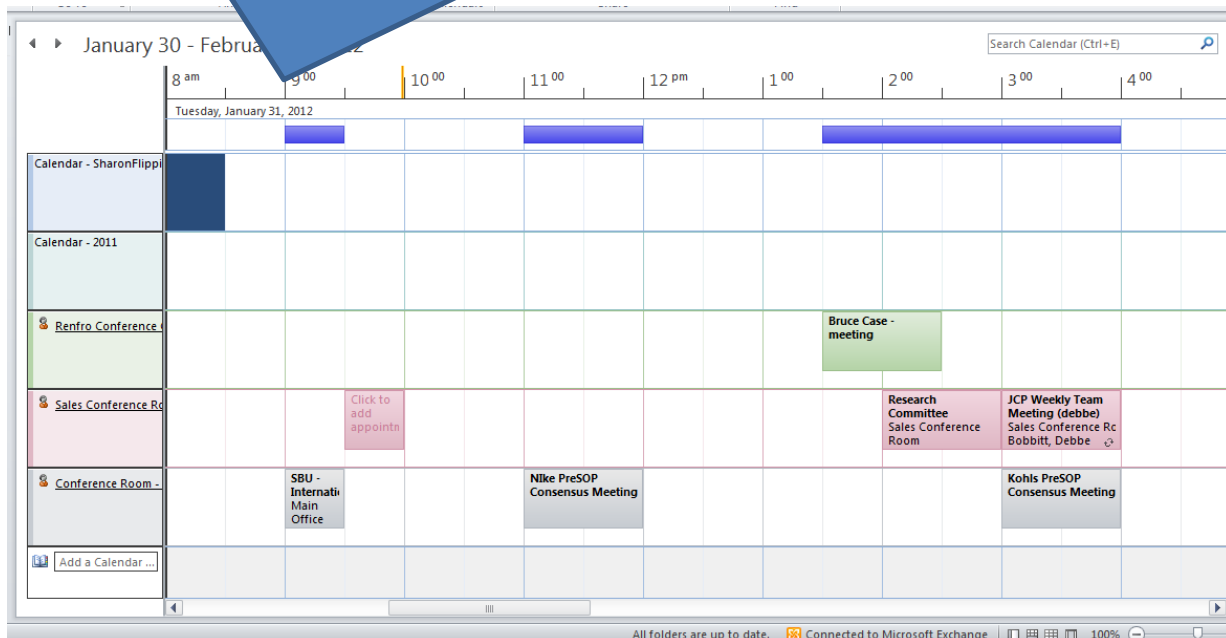


View side by side, or...

...overlay, by clicking the arrow here. Note that with the overlay, each calendar is color-coded to make it easy to determine which appointments belong to which calendars.



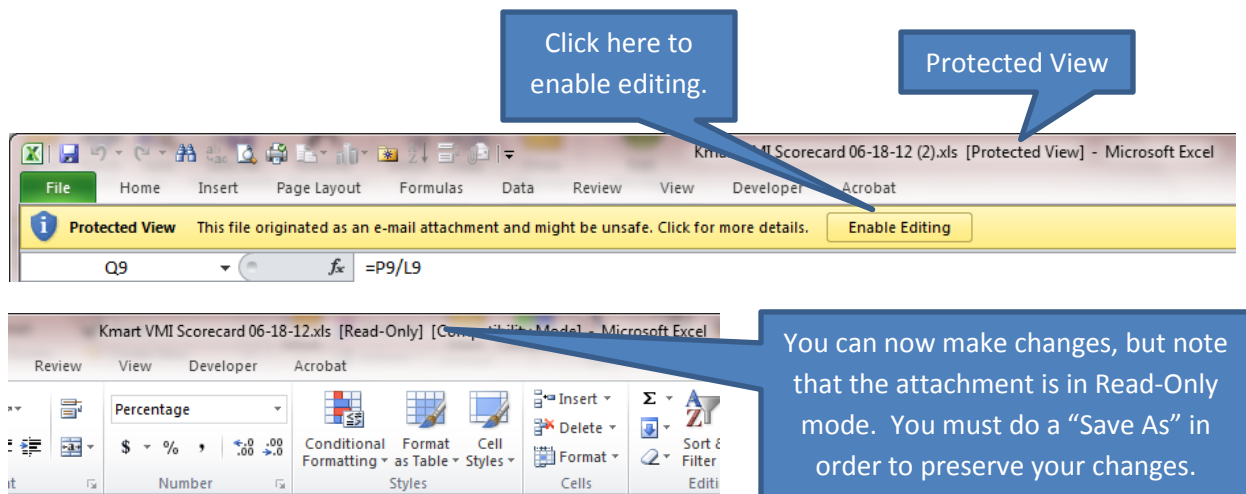
There does not appear to be a limit to the number of calendars you can select, but once you select five, it will automatically revert to the Schedule View, as shown below.



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Working with Attachments in Outlook 2010

Because of the enhanced security in the Office 2010 products, you will find that when you open email attachments in Outlook 2010, they will open in Protected View. In order to change that attachment, you can click on Enable Editing. Because of the default Protection settings, you will be required to do this each and every time you open an attachment.

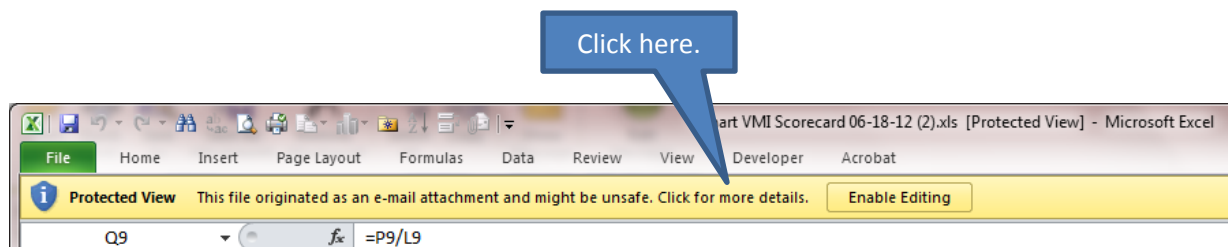


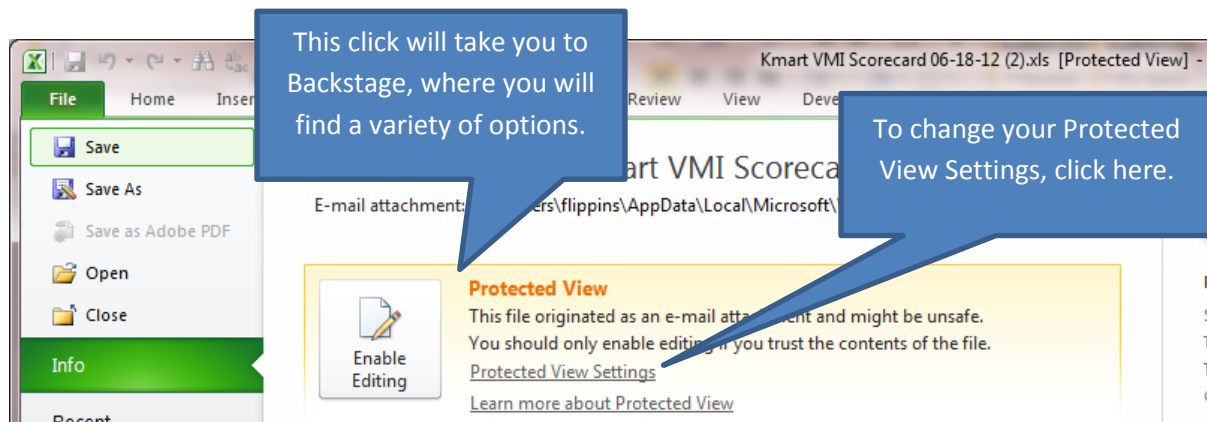
If you are not required to make changes to these documents on a regular basis, it is recommended that you leave this setting at its default. However, if you must frequently open attachments and make revisions to them, you may find this additional protection to be cumbersome.

How to Disengage Protected View:

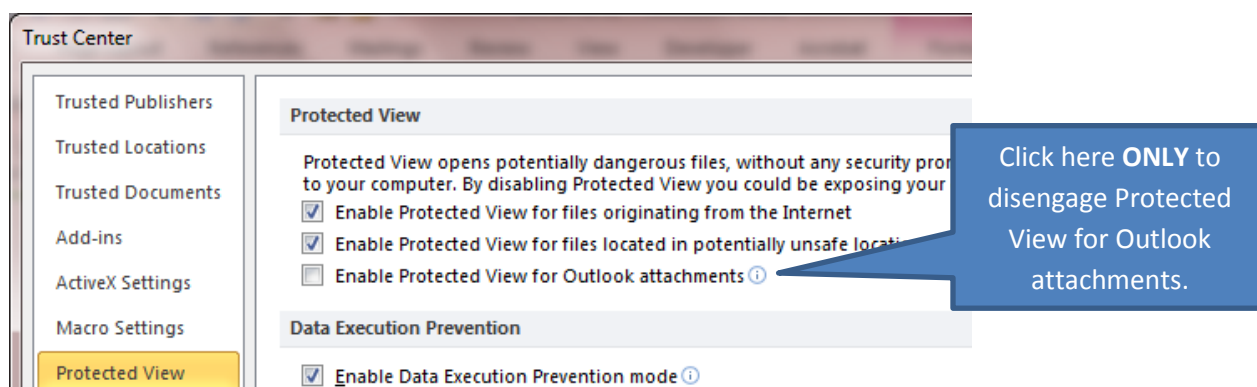
If you are only receiving email attachments from sources that you trust, you may opt to turn off the Protected View. **Important:** If you receive attachments from non-trusted sources, you may be taking a risk to turn this off. The intent of the Protected View is to protect you from viruses.

If you have determined that you are not at risk, select “Click for more details” to start the disengagement process.





Clicking on “Protected View Settings” will take you into the Trust Center. As the default, all boxes will be checked on the Protected View input screen.



Important: Do not uncheck any of the other boxes. This is for your protection.

Characteristics of this change:

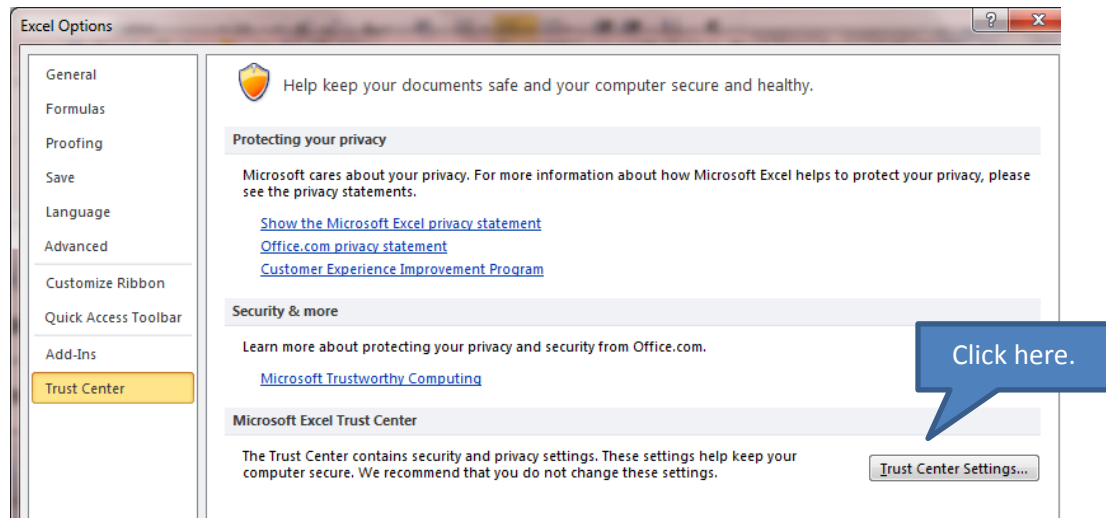
1. This process will need to be repeated for each of the Microsoft products, as desired. If you make the change from an Excel workbook, it will only apply to subsequent Excel workbooks. If you want to do the same for documents, you can follow the same process using a Word document that has been opened in Protected View.
2. The opened attachment will still be in read-only mode. (See [below](#) for more on working in read-only mode.)

How to Re-engage Protected View:

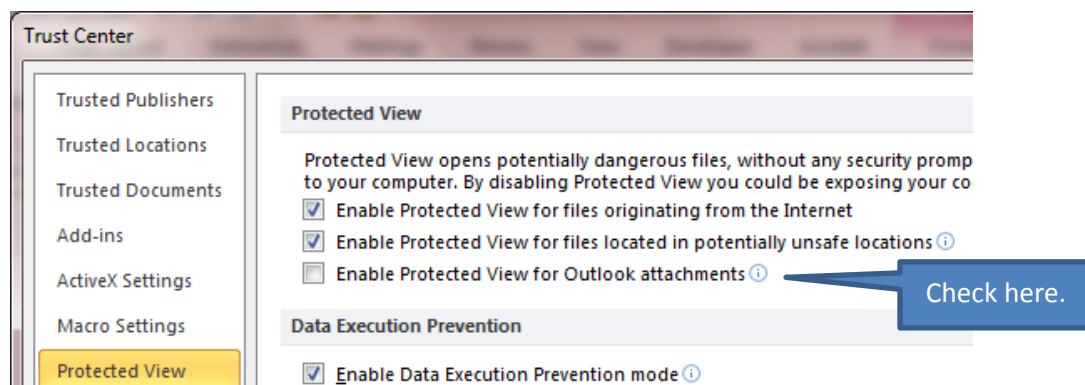
If you have disengaged protected view, you traditionally receive attachments from trusted sources. However, there could be an occasion when you receive an attachment of which you are uncertain. It is

always better to be safe than sorry. It is relatively easy to re-engage Protected View **BEFORE** you open that attachment.

1. Find an email with an attachment of the **same** program, i.e. Excel, Word, etc.
2. Select File \ Options \ Trust Center



3. This will take you to the Trust Center, as shown here.



4. Click OK on each screen. You should now be safe to open that attachment of which you are unsure. However, to be sure the Protected View is engaged, you may opt to close the 'safe' attachment you just changed and reopen it. If you see Protected View at the top, you should be safe with the questionable attachment.

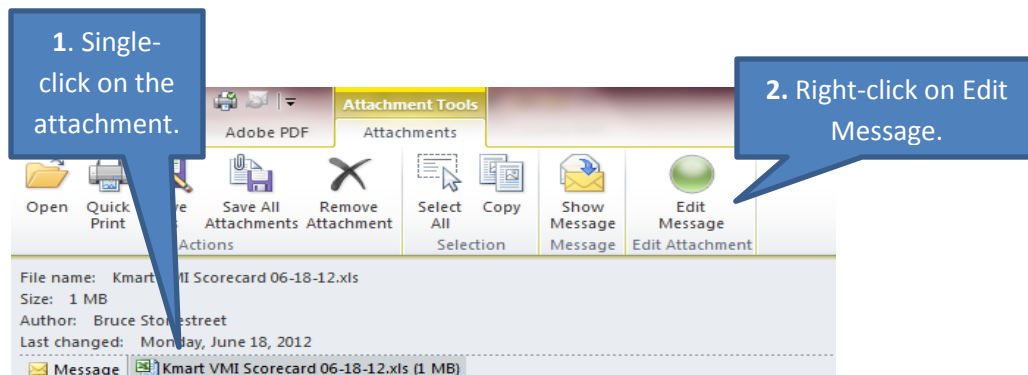
How to Edit Attachments within the Email Message:

If your business process includes making changes to Outlook attachments and redistributing them without saving to your Windows Explorer, you will find there is an additional step, due to the added security in Outlook 2010. The process depends on whether you add the "Edit Message" functionality to your Quick Access toolbar or not. If you do this frequently, you will find adding the function to your

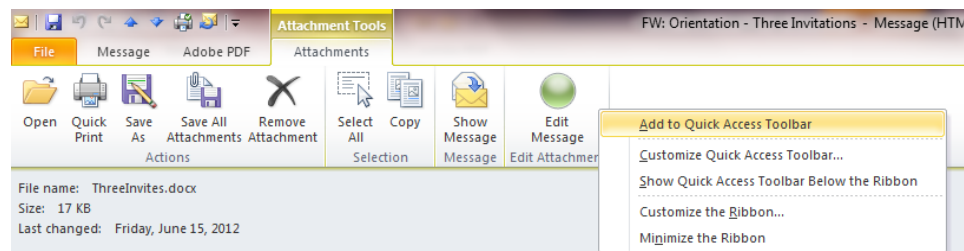
Quick Access toolbar will save you a step. In order to add it to the toolbar, you will need to open the conceptual ribbon, Attachment Tools. The process is as follows:

Adding Edit Message Function to Quick Access Toolbar:

- a. Open an email with an attachment and do a single-click on the attachment to highlight it. Do not open it. This will open the Attachment Tools conceptual ribbon, as shown here.



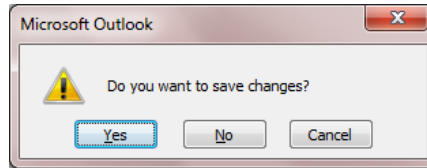
- b. When the dropdown appears, select "Add to Quick Access Toolbar". The "Edit Message" function will appear in your Quick Access toolbar.



To edit the message using the command on the Quick Access toolbar, employ the following process.

1. Open the email. You must actually open the email. This function will not appear when viewed in the reading pane.
2. Click on the Edit Message icon. Once you do this, you can open the attachment and it is ready to be edited.
3. Make your desired change(s) and **Save** the attachment.
4. To redistribute, you have the option to use one of these two approaches. Your email recipient will receive a copy of the updated attachment and you will have a copy of the updated attachment in your Sent folder.
 - a. Send from Excel using the Save & Send function.

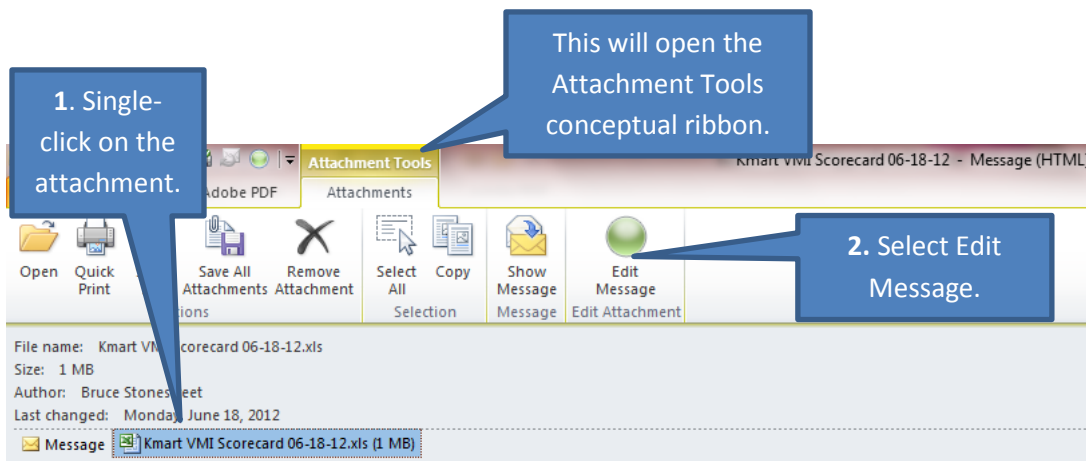
- Go back to the original email and “Forward” to the desired party.
- When you have completed the transmission and attempt to close the email, you will receive the following prompt.



If you select “Yes”, it will save the change you just made to the original email. If you select “No”, the original email will remain untouched and only the email in your Sent folder will contain the changes.

To edit the message without the command on the Quick Access toolbar, employ the following process.

- Open the email and do a single click on the attachment to highlight it. Do **NOT** open it. Do the following steps first.

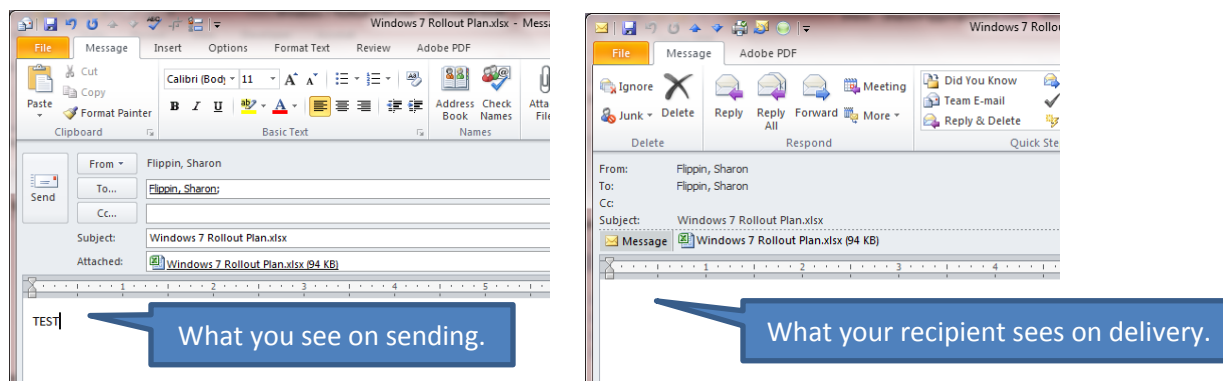


- Open the attachment and revise, as needed. **Save** the changes to the attachment. Pick up at [Step 4](#) above to complete.

Known Issue with Sending Email Directly from a Microsoft File:

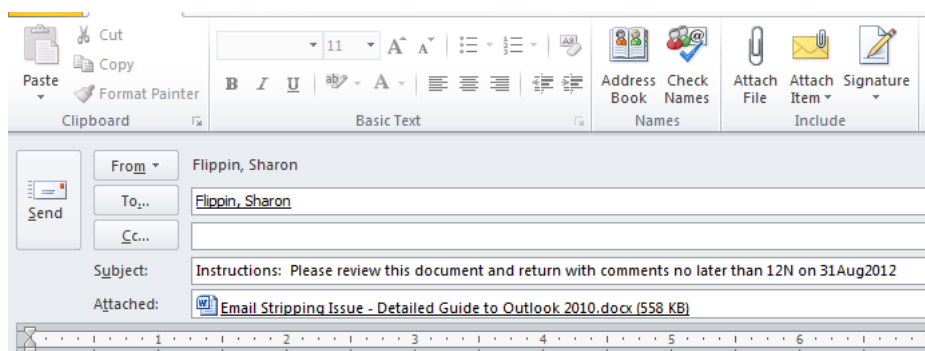
If your business process includes making changes to Microsoft Office files, whether it be an Outlook attachments or a Windows Explorer file, and redistributing them from the open file using the Send & Send function, there is a potential issue of which you should be aware. While this does appear to occur in very specific instances, it would be in your best interest to verify your individual results.

The known exception is if you currently Send & Receive email from your local machine (PC or laptop), rather than from the Outlook server. It is almost certain that when using the processes above, any text typed within the body of the note will be stripped out once the message is sent, because of the enhanced security within Office 2010. The email recipient(s) will receive the note, with only the subject line and attachment intact.



There are multiple ways to address this issue, dependent on the location from which the file is being sent. Below are the most common. Please note that the **best known solution** is to redirect your Mailbox back to the Outlook server. You will no longer encounter this security issue and no further action would be required. However, if you do not consider this a viable solution due to your mailbox size, the following are possible options to work around the issue, with things to consider in your decision making process. **Remember...** These are only needed IF you determine you have this issue.

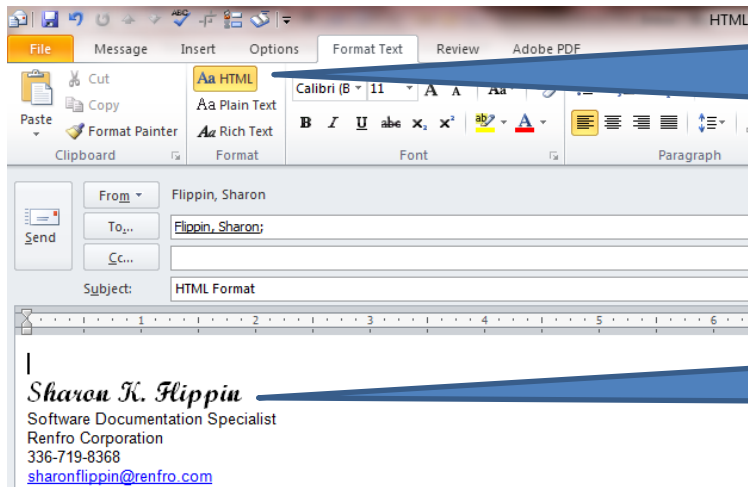
1. Enter all necessary communications in the Subject Line.
 - a. The Subject Line is limited to a maximum of 255 characters, but anything beyond 200 characters may not be visible to all recipients, depending on their screen size.
 - b. Basic Text functions, such as Bold and Italics are not available within the Subject Line.



2. Send these messages in Plain Text, rather than HTML or Rich Text. This can be changed in one of two ways.

Temporary Change: Once you have initiated the email from your file, go to the Format Text ribbon and change the HTML or Rich Text format to Plain Text. Using this process will only impact the email you are currently in. Your next email will use your default format setting.

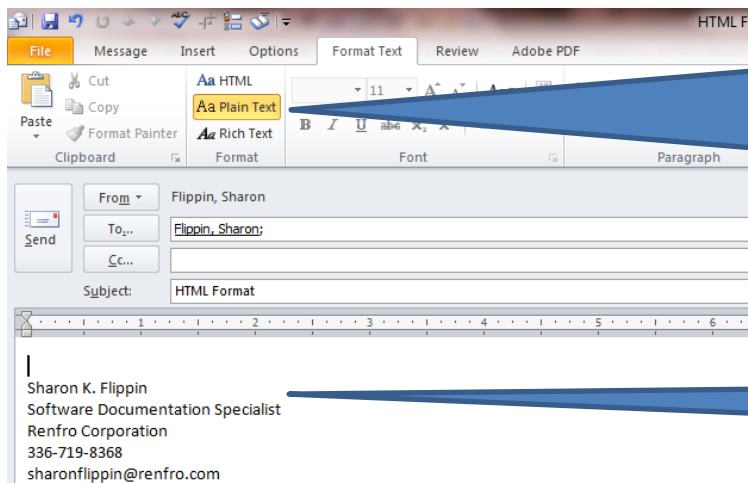
Before



With HTML selected, note that you can change Fonts, as well as other text formats.

...and your Signature format is as you originally set it.

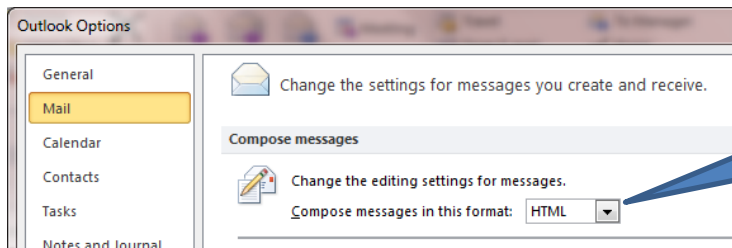
After



After selecting Plain Text, you lose format functionality. (Note: Once you have changed it to Plain Text, it cannot be changed back within that same email instance.)

...and you lose your Signature format.

“Permanent” Change: If the loss of functionality does not impact you, you may find a more permanent change to be desirable. This can be done by changing the default setting in File \ Options.



Select **Mail** and change HTML or Rich Text to Plain Text here.

Before making this change, however, you may want to consider the full impact.

- Loss of all but the very basic style options, i.e. standard fonts only, with no bold, italics, and highlighting.
- Inability to insert most items such as pictures, tables, etc.

3. Do not use the Save & Send option from a Microsoft Office file. Instead, originate your email message from Outlook and attach the file. This would require you to save the file to either your local machine or to a network location, select “New E-mail” in Outlook, and then select “Attach File”.
 - a. This does take an extra step and, depending on how and where the file is stored, could take more time as you sift through all files in that location.

Additional Resources

1. The [Outlook Quick Reference Card](#) provides you with further details on Outlook 2010.
2. For a more in-depth online training session, go to [Outlook 2010 Training](#). (40-50 minute session)

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