

LEARNING MADE EASY



Covers
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Take control of your
Inbox with folders and rules

Integrate Outlook with iCloud,
Google, and other services

Boost productivity with
task lists and calendars

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Master Instructor



Outlook[®]

By Faithe Wempen, M.A.

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dummies[®]
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Outlook® For Dummies®

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Introduction

Microsoft Outlook has become an essential business tool in the years since it was first released in the 1990s. If you work in a company that employs more than a dozen people, it's a pretty good bet that you'll be using Microsoft Outlook to manage your email and calendar. Whether you're giving or taking directions, organizing meetings, collaborating on important projects, or just keeping up with business, Outlook is what you'll use to get it done fast. Outlook has become even more important to businesses in recent years, with more companies encouraging telecommuting and hiring employees who work from home.

Outlook is not just for business use, though — far from it. Outlook is also the application of choice for millions of people who use it for their own personal communication needs. Students use it to communicate with their teachers and fellow students about academic projects. Parents use it to manage the family calendar so that everyone knows where they need to be. Hobbyists use it to communicate with other people who share their passion for whatever makes them smile, whether it's birdwatching, woodworking, or role-playing games.

Outlook: What Is It Good For?

Outlook is a personal information manager that can act as your assistant in dealing with the flurry of small but important details that stand between you and the work (or play) you do. It sends and receives email, maintains your address book, schedules meetings and

appointments, tracks your to-do list, and more, all in one place.

Here are just a few of the cool things it can do for you:

- » Send email messages to individuals or groups, including attachments, graphics, text formatting, signature blocks, and more.
- » Keep an address book of all your contacts with consistently up-to-date information.
- » Manage multiple calendars (such as for work and for home) and overlay their appointments in a single view so you can make sure there aren't any conflicts.
- » Schedule a meeting and reserve a conference room in your workplace, then send out meeting invitations and track who has accepted or declined.
- » Organize hundreds of little pieces of data with digital "sticky notes" that you can search, sort, and color-code.

About This Book

Outlook For Dummies Office 2021 Edition is your one-stop guide to all things Outlook. Whether you're brand-new to Outlook or a long-time casual user looking to go deeper, you'll find the help you need here. The book is organized in six parts, each with a specific theme:

Part 1: Getting Started with Outlook. Start here if you're not already familiar with Outlook at a basic level. Here you'll get an overview of what Outlook does, take a guided tour of the interface, and learn some handy shortcuts for getting around.

Part 2: Taming the Email Beast. If you're mostly interested in Outlook's email capabilities, start here.

You'll learn how to send and receive messages with all kinds of different options, like attachments, special formatting, signature lines, and read receipts. You'll also learn how to organize your messages into folders, create mail-handling rules that automatically move incoming messages into certain folders, and set up multiple email accounts to work with Outlook.

Part 3: Keeping Track of Contacts, Dates, Tasks, and More. In this part you'll learn about several of Outlook's tools for organizing your busy life and schedule. You'll see how to set up your address book (which Outlook calls *Contacts*), how to schedule meetings and appointments on your calendar(s), and how to manage your to-do list.

Part 4: Taking Outlook to the Next Level. This part tackles some less common topics that may be of interest to you. You'll find out how to integrate Outlook with other Office applications and with Google and iCloud services, for example. You'll also learn how to use Outlook on mobile devices that run iOS or Android, and how to customize Outlook to better serve you.

Part 5: Outlook at Work. Some Outlook features only work if your office uses an Exchange mail server (and a lot of offices do). You'll learn about those features in this part, and you'll find out how to use Outlook.com and the Outlook Web app for telecommuting.

Part 6: The Part of Tens. As is customary in a Dummies book, I wrap things up by providing some Top 10 lists that you can skim at your leisure. You'll learn about ten time-saving shortcuts, ten things that Outlook actually *can't* do (so you can stop banging your head against the wall trying to get them to work!), and ten cool features that most people don't know about.

About Version Numbers

Outlook is part of a suite of applications called Microsoft Office. Microsoft offers a choice in how to buy Microsoft Office: as a subscription or as a one-time purchase.

The one-time-purchase version has a version number that represents the year it came out, like Office 2021. There are different editions of this product for different demographics, like Professional, Home and Student, or Enterprise. You get periodic automatic updates (if that option is enabled), but there are no major upgrade options. That means if you plan to upgrade to the next major release in the future, you will have to buy it at full price.

The subscription method is called Office 365, and it's the most popular one, both for business and personal uses. Office 365 is a general name for the subscription offering; 365 is not a version number. With the subscription method, you always have the most recent version at no extra charge, even if a major new version comes out. Microsoft silently rolls out new features and tweaks nearly every month via automatic download and installation. One day you'll open up Outlook and notice a new feature, or you'll see that the interface looks slightly different (and hopefully you'll think it's an improvement!). There are different Office 365 subscription plans for individuals, businesses, and schools that contain different combinations of the various applications. (They all include Outlook, though.)

Some business IT departments *really* don't like the fact that Microsoft frequently rolls out updates to Office without advance warning. They like to be able to control what updates are installed — and when. They like to get the updates well in advance and test them before they

allow them to roll out to the users they support, to make sure there are no conflicts or bugs that will cause problems with other essential software that they use. For these companies, Microsoft offers an alternative: They will sell these companies a version of Office 2021 that does not automatically update. It stays exactly the same for months at a time, with changes rolled out every 6 months. This roll-out method is called the Long-Term Servicing Channel (LTSC).

So, generally speaking, what does all this mean to you?

- » You probably have Office 365. Most people do.
- » Which version you have really doesn't matter all that much. All versions get updated — just on different schedules.
- » You might see some minor differences in your Outlook interface compared to what's shown and described in this book. This is unavoidable.

Foolish Assumptions

As I wrote this book, I made certain assumptions about you, its reader. For one thing, I assume you know how to turn on your computer, use a mouse and keyboard, and navigate your way around Microsoft Windows 10. If Windows or Microsoft Office is strange to you, I recommend picking up Andy Rathbone's *Windows 10 For Dummies* or Wallace Wang's *Microsoft Office For Dummies*, respectively. Or, if you're of the senior set and more interested in home use than business, check out my book *Microsoft Office For Seniors For Dummies*. (All are published by Wiley.)

And speaking of Windows, I'm assuming you have the desktop version of Outlook running on Windows 11. (Yes,

it also runs on laptops.) There are online and mobile versions of Outlook, and in fact I do cover them in [Chapter 16](#), but most of this book is for users of the version that runs on Windows computers. There is also a Mac version of Outlook, and it works basically the same as the Windows version, but I don't cover it specifically.

I'm *not* making any assumptions about whether you're a home or business user; there's plenty of help in this book for both.

Interface Conventions Used in This Book

Outlook has many unique features, but it also has lots in common with other Windows programs: dialog boxes, drop-down menus, Ribbons, and so on. To be productive with Outlook, you need to understand how these features work and recognize the conventions I use for describing these features throughout this book.

Dialog boxes and windows

You deal with more dialog boxes in Outlook than you do in many other Microsoft Office programs. A dialog box is a box that pops up asking for information. Sometimes it's super simple, like a warning message asking you to click OK to continue. Other times there are dozens of options, like the dialog box that lets you set Outlook program options (covered in [Chapter 14](#)).

Here are the essential parts of a dialog box. You can see them in action in [Figure I-1](#).

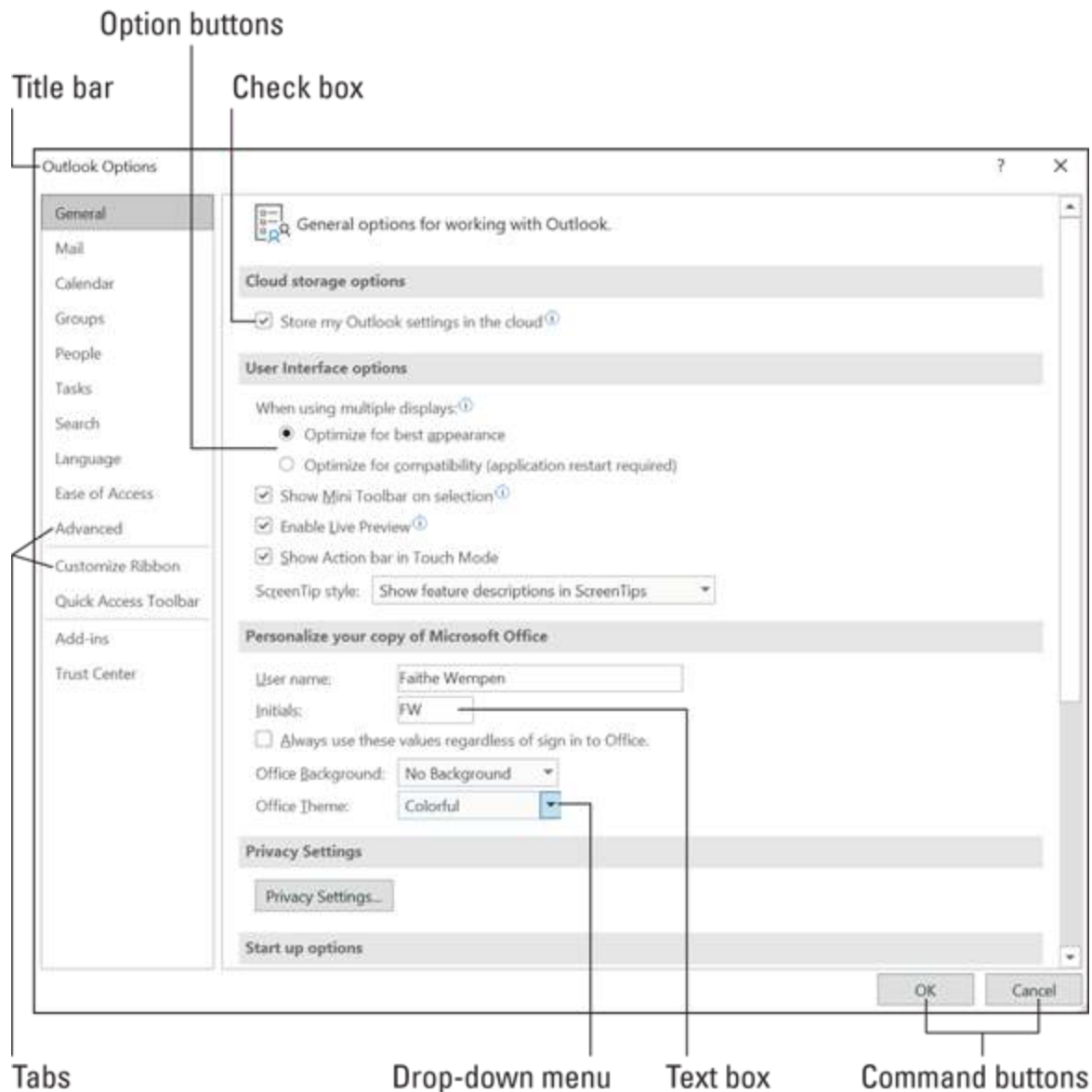


FIGURE I-1: A typical dialog box that showcases some of the control types.

- » **Title bar:** The title bar tells you the name of the dialog box or window.
- » **Text boxes:** Text boxes are blank spaces into which you type information. When you click a text box, you see a blinking cursor, which means you can type text there.
- » **Option buttons:** These are sets of round buttons where you can only select one of them at a time. When you click one, the others become unselected.

They're used for situations where it's impossible to have more than one thing at a time, like Portrait vs. Landscape page orientation.

- » **Check boxes:** These are square boxes for individual yes/no toggles. Even if there's a set of them, each one is separate.
- » **Drop-down menus:** These look like rectangular buttons, but they have a down-pointing arrow at the right side. When you click them, a menu of options appears; click an option to make your selection.
- » **Command buttons:** These rectangular buttons execute commands, like OK or Cancel. Sometimes they have an ellipsis on them (three dots, like this: ...), which indicates that they open another dialog box.
- » **Tabs:** Some dialog boxes have multiple pages, and each page has a tab you can click to display it. In [Figure I-1](#) the tabs are just words in a bar along the left side, but in some dialog boxes the tabs run across the top of the dialog box window and look like actual file folder tabs.

Windows are closely related to dialog boxes; they're large boxes (typically resizable) designed to help you create or manage data. For example, when you schedule a new appointment on the calendar, a New Appointment window opens up, prompting you for the title, date, time, and any notes. The same is true for new email messages, new contacts, and so on.

Ribbons and tabs

Outlook features a strip of graphical buttons across the top called the Ribbon. See [Figure I-2](#). You can find out what each button does by hovering the mouse pointer over it so a pop-up ScreenTip appears.



FIGURE I-2: The Home tab of the Ribbon in Outlook.

The Ribbon is a multi-tabbed affair, and the tab names appear as a row of text above the Ribbon: Home, View, and so on. You start out on the Home tab, but you can click one of the other tabs to switch to it any time.

There's one special tab: File. This tab opens a whole different screen, called Backstage view. This screen lets you open and export data files, set program options, print, and perform maintenance-type functions like setting up rules, managing add-ins, and setting program options. See [Figure I-3](#).

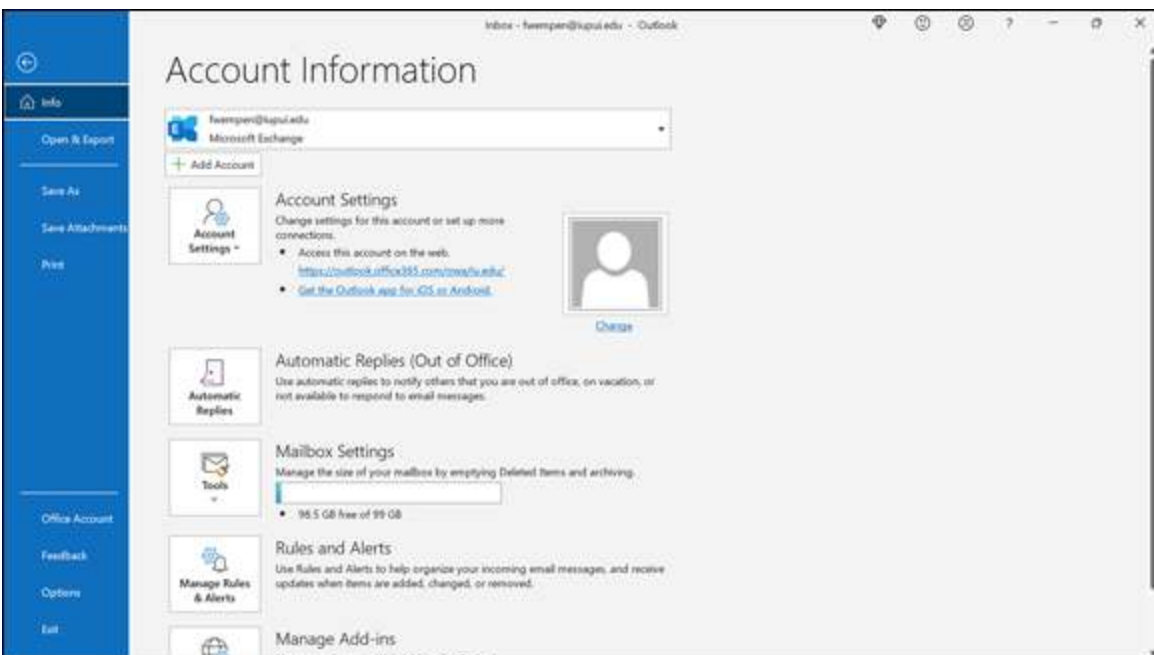


FIGURE I-3: Backstage View in Outlook.

Keyboard shortcuts

Normally, you can choose any Windows command in at least two different ways (and sometimes more):

- » Click a button on the Ribbon or in the navigation pane.