



Outlook 2010 Tips & Tricks

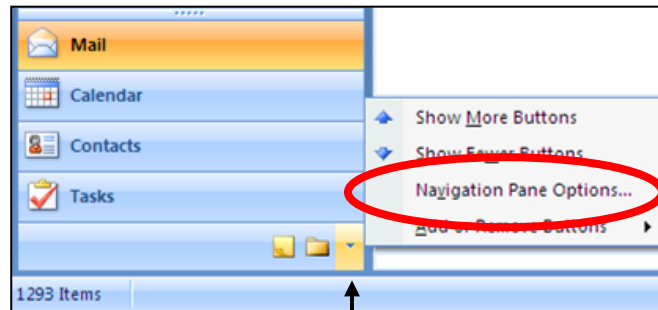
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Customize the Navigation Pane

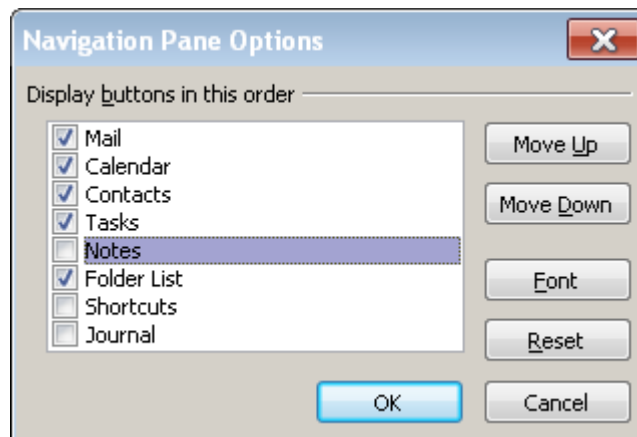
To customize which buttons appear on the Navigation Bar and in what order:

1. Click the **Configure buttons** arrow and select **Navigation Pane Options**.



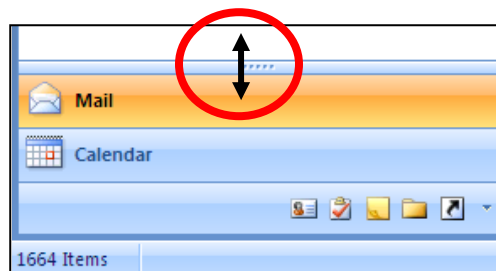
The Configure buttons arrow

2. Uncheck each button you do NOT wish to display in the Navigation Pane or check buttons you do wish to display.



3. To rearrange the buttons, select the button to be moved and click the **Move Up** or **Move Down** button, as necessary.

Tip: Drag the Navigation Pane sizing handle to change the size of the Navigation Pane and its buttons.

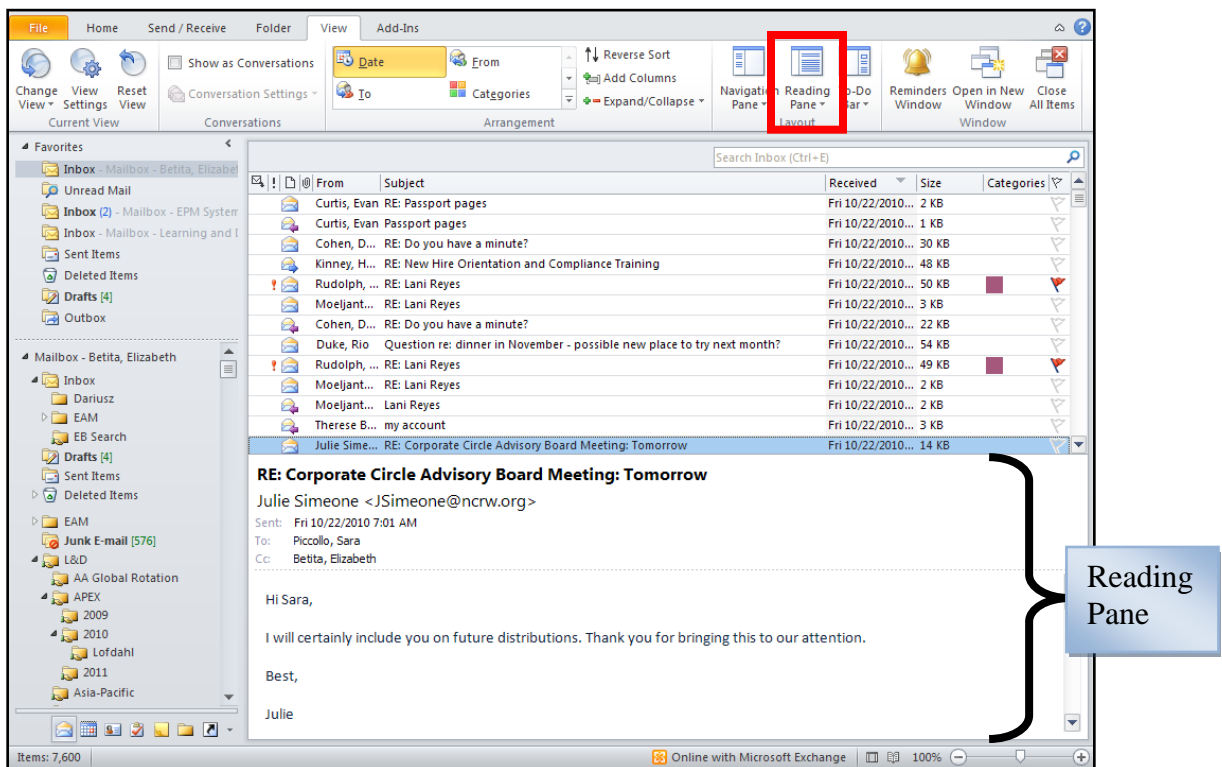


Customize the Reading Pane

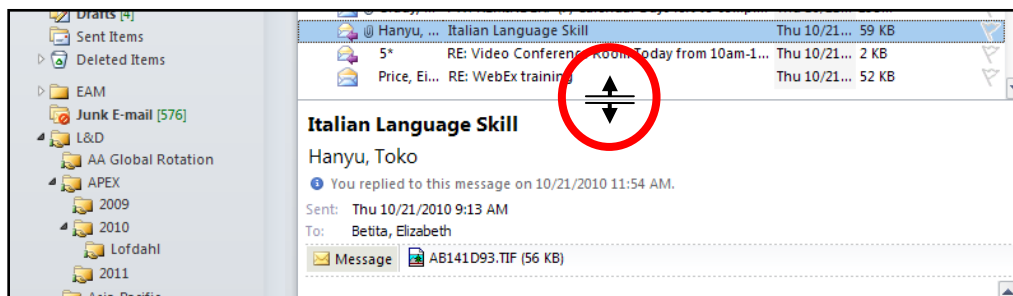
The Reading Pane is an additional pane that can be displayed for a number of your Outlook folders. The Reading Pane lets you see the contents of a message in your Inbox without having to open that message in a separate window. You can follow a hyperlink, respond to meeting requests, open or view attachments and add the sender to your Contact list – all without opening the message. In the Calendar, Contacts and Tasks folder, the Reading Pane lets you see details you would ordinarily see if you double-clicked a calendar item, contact or task.

To open the Reading Pane:

1. On the **View** tab of the Ribbon, click the **Reading Pane** button and choose **Right** or **Bottom**.

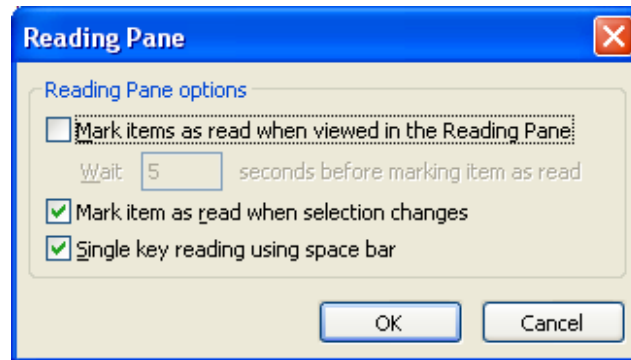


2. Adjust the size of the Reading Pane by dragging the border that separates the Reading Pane from the rest of the Outlook window.



Outlook provides several options pertaining to the Preview Pane. To change the Preview Pane options:

1. On the **View** tab of the Ribbon, click the **Reading Pane** button and choose **Options**.



2. Change the following options as necessary.

- *Mark items as read when viewed in the Reading Pane* will cause the message header in the top pane to change from bold (unread) to regular text if the message is viewed in the Preview Pane for the specified number of seconds.
- *Mark item as read when selection changes* will cause the message header in the top pane to change from bold (unread) to regular text as soon as you navigate to another message.
- *Single key reading using space bar* enables you to use the Spacebar to move through the list of messages in the top pane, displaying the contents of each message in the Preview Pane. For messages that are too long to display in their entirety in the Preview Pane, continuing to press the Spacebar will scroll through the contents of the message in the Preview Pane.

Tip: Right-click the Sender's name in the Reading Pane to add that sender to your Outlook contacts.

Customize the To-Do Bar

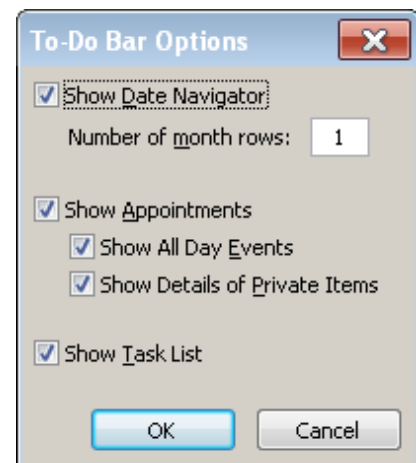
The To-Do Bar provides quick access to your calendar as well as your Task List. By default, the To-Do Bar shows a 1-month Date Navigator, your next three calendar items and all of the tasks in your Task List.

To display the To-Do Bar:

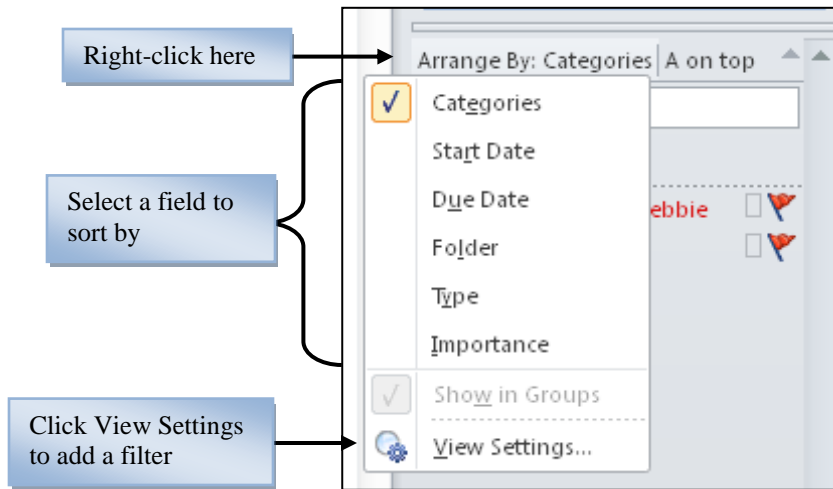
1. Click the **View** tab on the Ribbon.
2. Click the **To-Do Bar** button and select **Normal**.

To modify what displays in the To-Do Bar:

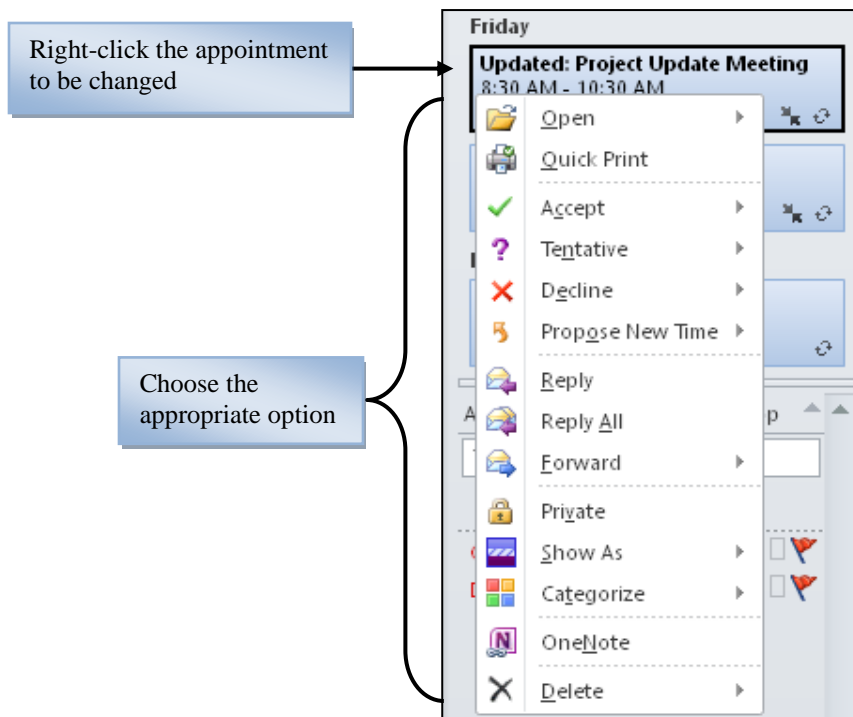
1. Click the **View** tab on the Ribbon
2. Click the **To-Do Bar** button and select **Options**.
3. Change the options as desired and click **OK**.



Tip: You can change the sort order of the To-Do Bar Task List or add a filter by right-clicking “Arrange By” at the top of the List, as shown below.



Tip: You can manage the appointments that display in the To-Do Bar by right-clicking the appointment to be changed, as shown below.



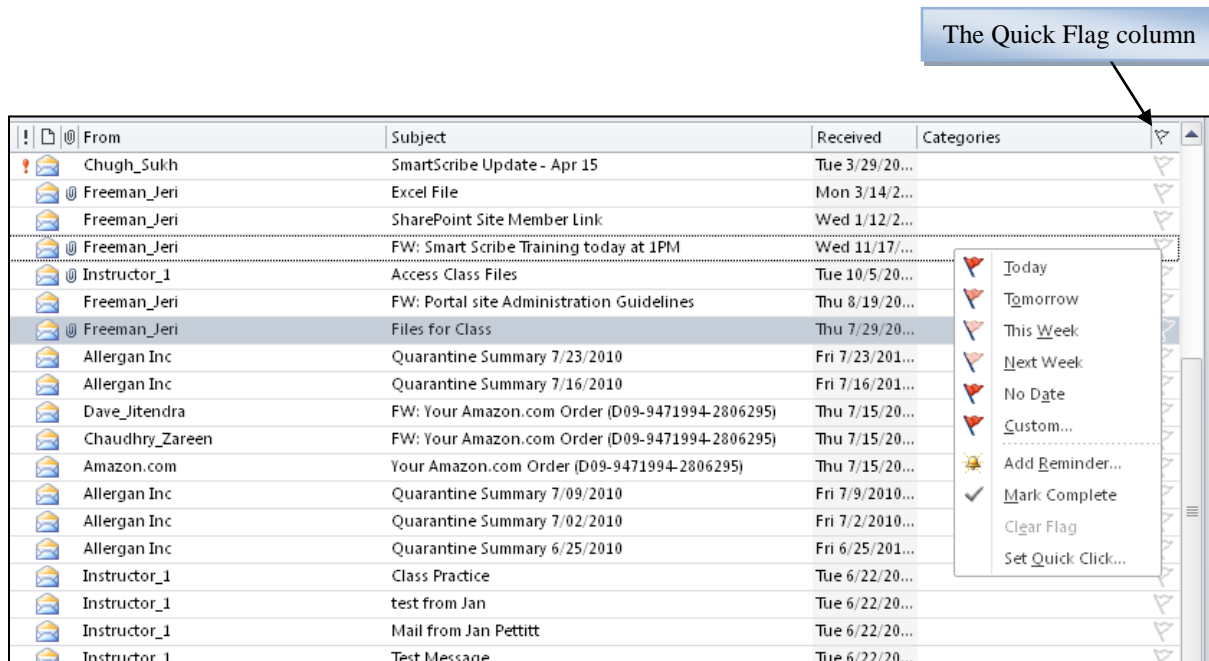
Use Quick Flags

Flags can be added to mail items, meeting requests, contacts and posted items to remind you to follow up on an issue. Flagging a message adds that message to the Task List, and therefore causes it to appear in your To-Do Bar.

You can also use flags to set a reminder for the message or contact. On the specified date and time, the reminder will pop up in an Outlook dialog box, just like the one you see with appointment reminders.

To add a Quick Flag to a message:

1. Right-click in the Quick Flag column to the right of the message to be flagged.
2. Select a flag representing the due date you wish to assign to the task.



To remove a flag from a message:

1. Right-click in the Quick Flag column to the right of the message to be unflagged.
2. Select **Clear Flag**.

To set a reminder for a message:

1. Right-click in the Quick Flag column to the right of the message for which you wish to set a reminder.
2. Select **Add Reminder**.
3. Choose the date and time for the reminder and click **OK**.

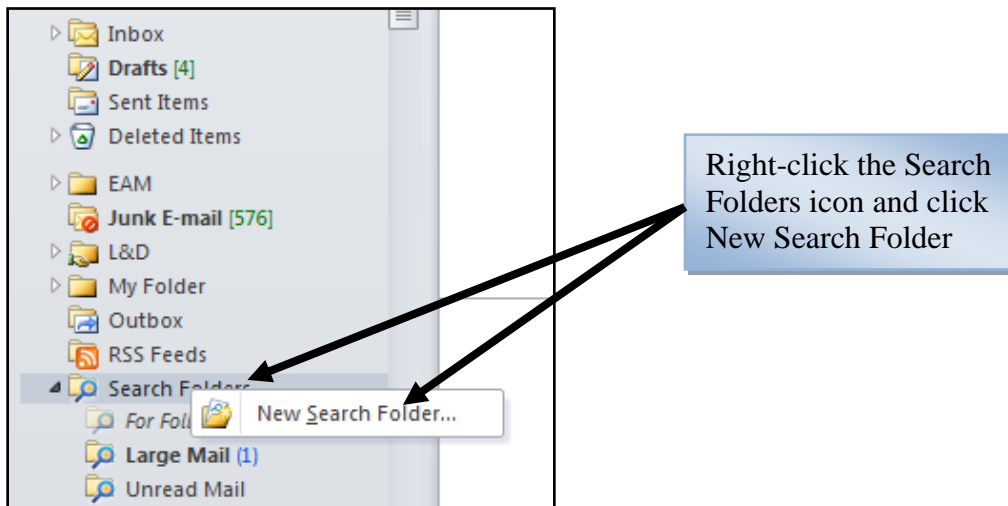
Create Search Folders

The Search Folders feature lets you search for Outlook messages in all folders of your Mailbox using a number of different criteria. For example, you can find items that contain a certain word or phrase in the message area, are assigned a specific category or have high importance.

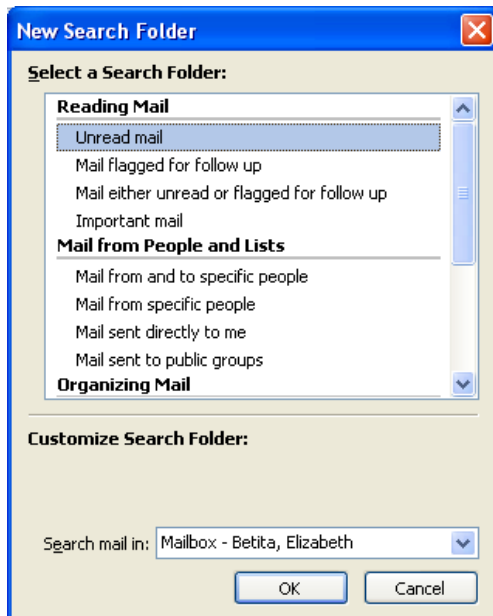
Several Search Folders exist by default. For example, you may have a Search Folder called *For Follow Up* that automatically searches all folders in your Mailbox and returns with a list of all flagged messages. Another Search Folder, *Large Mail*, will search all folders in your Mailbox for messages whose size exceeds 100K. The resulting messages returned by a Search Folder can be opened, forwarded or deleted from within the Search Folder, although they technically reside exist in the original folder.

You can also create your own Search Folders. To create a Search Folder:

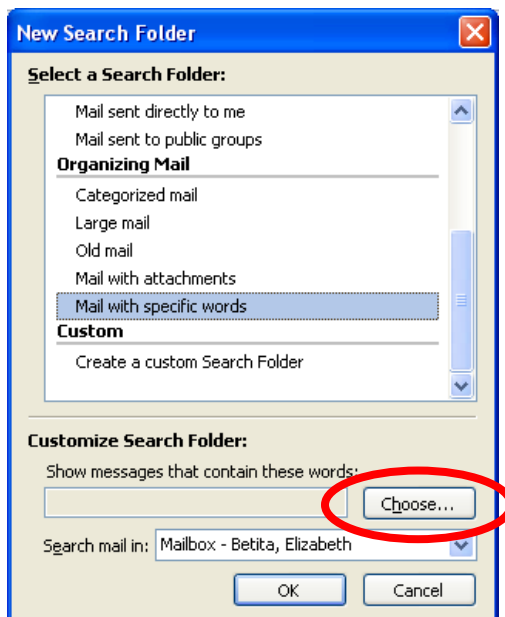
1. Right-click on the Search Folders icon in the Navigation Pane and click **New Search Folder**.



2. In the New Search Folder dialog box, select a predefined option or scroll to the bottom and select **Create a custom Search Folder** to create a Search Folder from scratch.



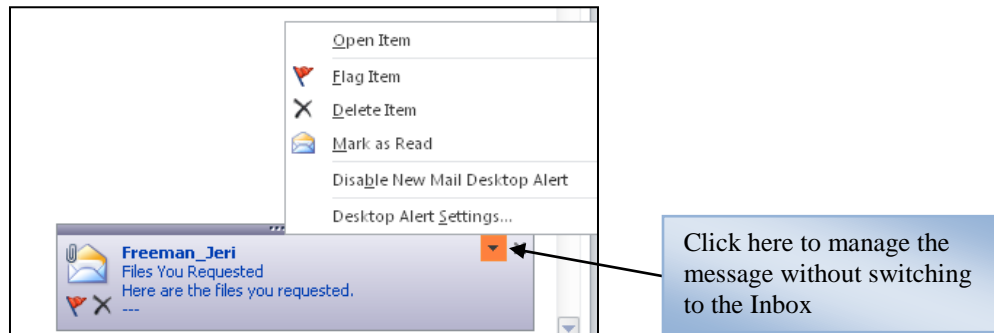
3. If necessary, click the **Choose** button and type or choose the necessary criteria.



4. Once all criteria have been specified, click **OK** button to close any open dialog boxes. Your new Search Folder will appear in the Search Folders area of the Navigation Pane. To rename your Search Folder, right-click it and choose **Rename Folder**.

Use and Customize E-mail Alerts

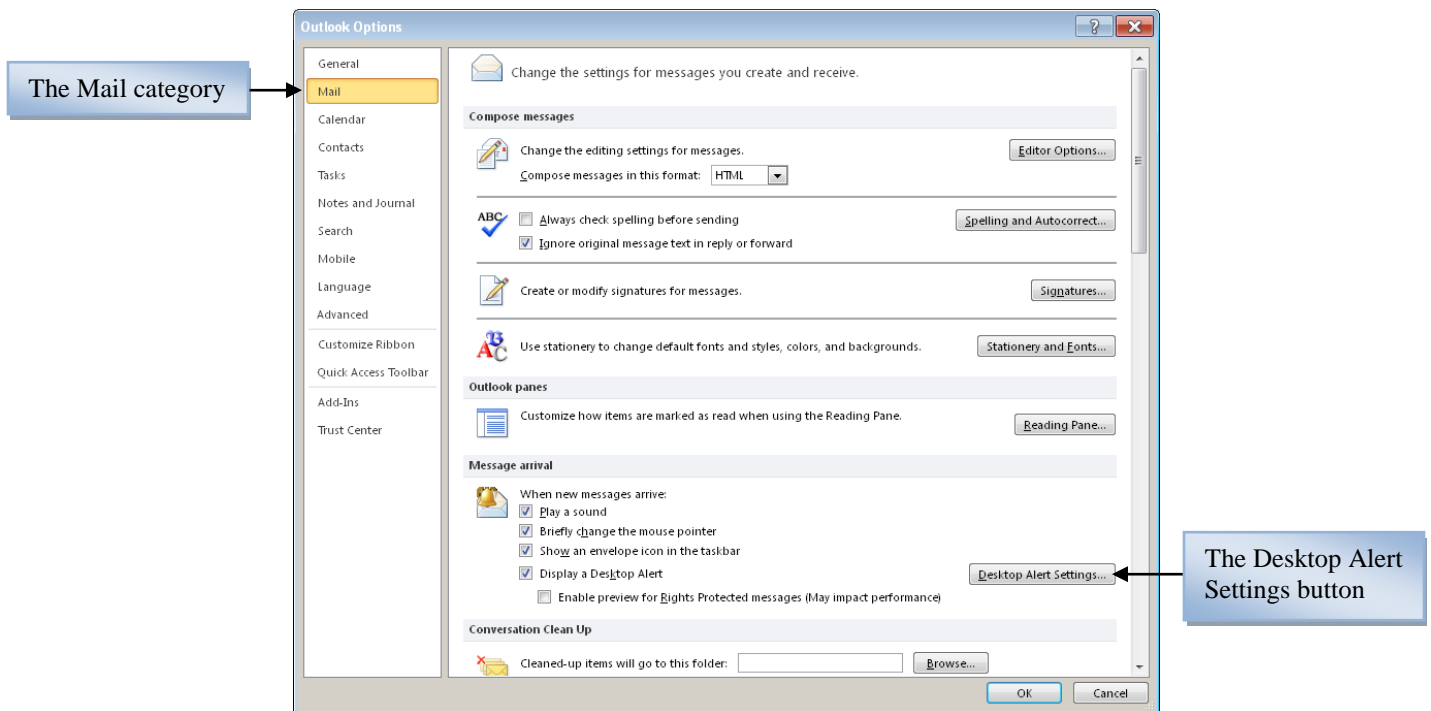
A new e-mail alert is a notification that appears on your desktop when you receive a mail message. By default, Desktop Alerts appear in the lower right corner of your desktop. When the alert appears on your desktop, you can click the down-arrow next to the close button and use the resulting menu options, shown below, to manage the message without switching to your Inbox.



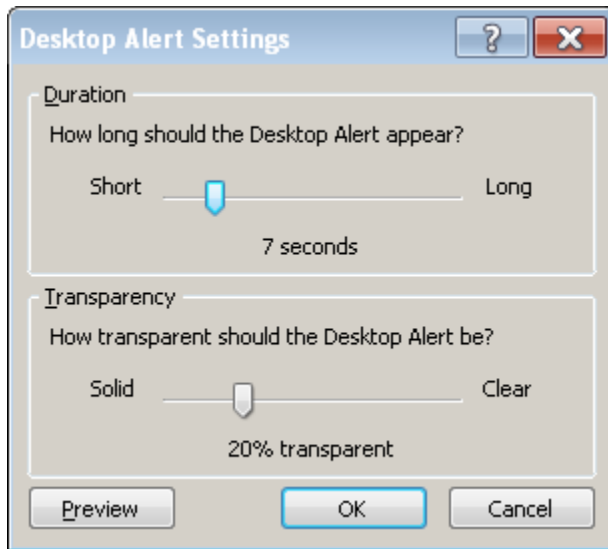
You can keep a Desktop Alert visible by positioning your cursor on the alert before it fades from view. You can also change the default length of time they remain visible. You can adjust the transparency of the alerts to make them more noticeable or to keep them from blocking your view of other items. Finally, you can change where your Desktop Alerts appear on your desktop.

To customize the Desktop Alerts:

1. From the **File** tab on the Ribbon, click **Options**.
2. In the **Mail** category, click the **Desktop Alert Settings** button.



3. Make the desired changes in the Desktop Alert Settings dialog box, as shown and discussed below.



- To change the length of time the alert remains visible, drag the *How long should the Desktop Alert appear* control button to the left or right.
 - To have the alert be more or less transparent, drag the *How transparent should the Desktop Alert be?* control button to the left or right.
 - To change the location of the alerts on your desktop, click the **Preview** button and drag the top edge of the alert to a new location.
4. Click **OK** twice to return to Outlook.

To turn off Desktop Alerts:

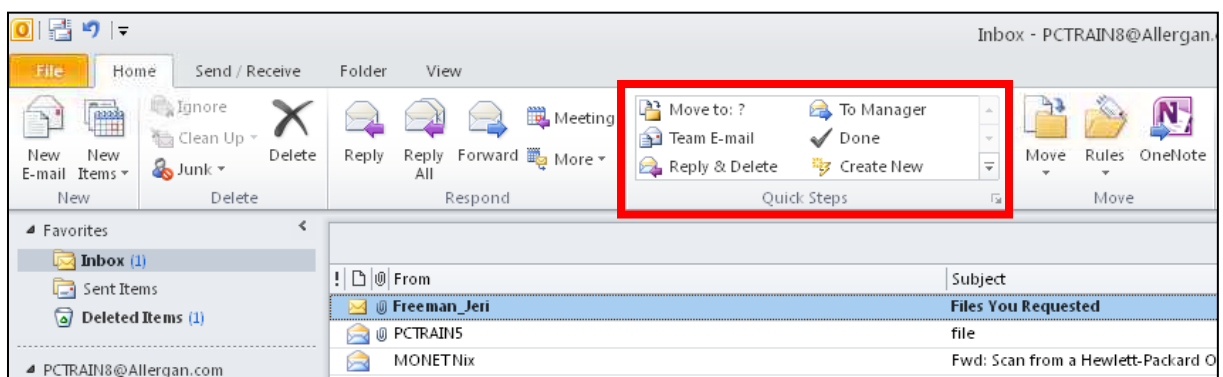
1. From the **File** tab on the Ribbon, click **Options**.
2. Click the **Mail** category.
3. Click the **Display a Desktop Alert** check box to clear the check mark.
4. Click **OK** to return to Outlook.

Use Quick Steps

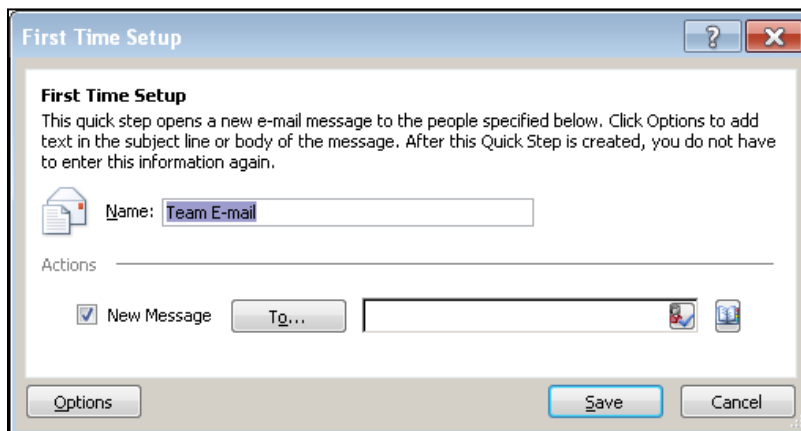
Quick Steps is a new feature in Microsoft Outlook 2010 that applies multiple actions to email messages at the same time. This helps you quickly manage your mailbox. For example, if you frequently move messages to a specific folder, you can use a Quick Step to move the message in one click. If you regularly forward messages to you're the same user(s), a one-click Quick Step can simplify the task. You can customize the default Quick Steps or create your own.

To customize a default Quick Step:

1. On the **Home** tab of the Ribbon, click the Quick Step you wish to customize (i.e. Team E-mail).



2. In the First Time Setup box, change the Name of the Quick Step if desired.

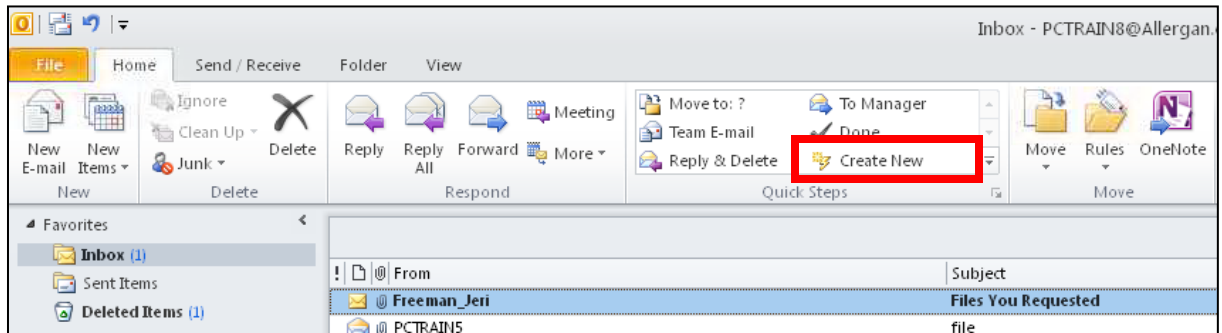


3. Specify other information required by the Quick Step.
4. Click **Save**. From now on, each time you click the icon for the Quick Step it will perform the action(s) you indicated in step 3.

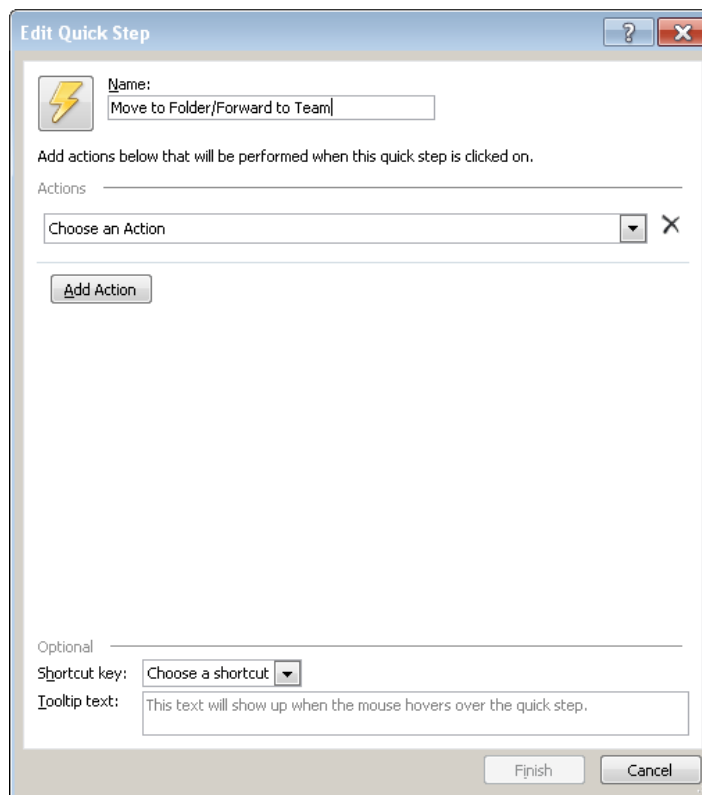
Tip: Click the Options button in the First Time Setup dialog box to add additional actions, assign a keyboard shortcut to the Quick Step or change the Tooltip you see when you hover over the icon for the Quick Step.

To create your own Quick Step:

1. On the **Home** tab of the Ribbon, click the **More** button in the Quick.



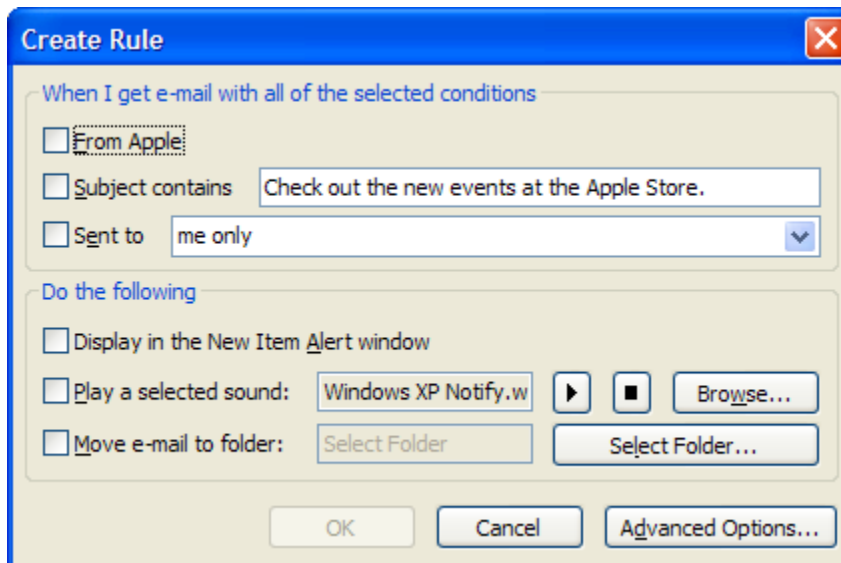
2. Type a name for the Quick Step.



3. Choose an action for the Quick Step and supply the necessary details.
4. If necessary, click the **Add Action** button to add another action.
5. Choose an action for the Quick Step and supply the necessary details.
6. Repeat steps 4 and 5 as necessary.
7. When you have configured all the actions for this Quick Step, click **Finish**.

Use the Create Rule Button

The Rules button on the Home tab of the Ribbon provides 2 ways to quickly create simple rules. The Always Move Messages From option lets you quickly create a rule that will automatically move messages from the sender of the selected message to the folder that you specify. The Create Rule option gives you a little more flexibility in creating a quick rule. When you select the Create Rule option on the Rules button, you can select which attribute(s) of the currently selected message will cause the rule to execute: the sender, the subject and/or who the message was sent to, as shown below.



In addition, you can choose up to 3 actions that will apply to a message that meets the selected conditions. You can automatically move the message to the selected folder, play a sound and/or display the message in the New Item Alert window. The New Item Alert window lets you quickly open the message without navigating to Outlook or your Mailbox.

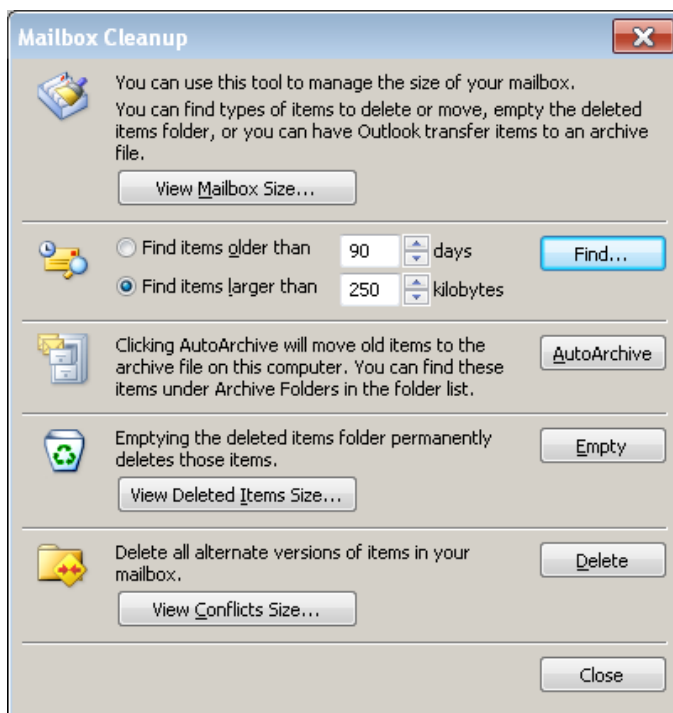
Mailbox Limits/Cleaning Up your Mailbox

Many companies place limits on the maximum size of your Outlook mailbox. Regular mailbox maintenance includes removing items from the folders in your mailbox or moving items to personal folders.

Mailbox Cleanup is one tool that helps you manage the size of your mailbox. You can view the total size of your mailbox and of individual folders within it. You can easily locate items that are larger than a certain size or older than a certain date. You can also empty your Deleted Items folder from within Mailbox Cleanup.

To use the Mailbox Cleanup feature:

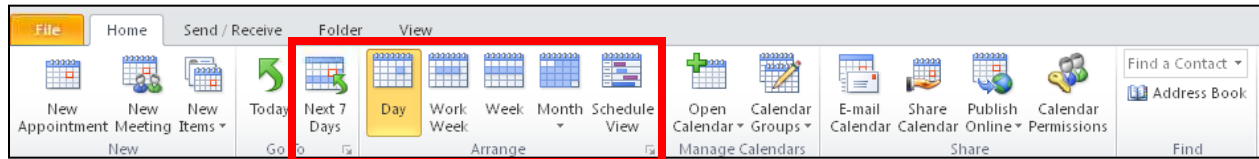
1. From the **File** tab, select **Cleanup Tools > Mailbox Cleanup**.



2. To see the overall size of your mailbox, as well as the size of each folder within your mailbox, click on **View Mailbox Size**
3. To find items older than a specified number of days, enter the number of days in the appropriate box and click **Find**. Once found, the items can be deleted or moved to a personal folder.
4. To find items larger than a specified size, enter the size in the appropriate box and click **Find**. Once found, the items can be deleted or moved to a personal folder.
5. To empty the Deleted Items folder, click on **Empty**.

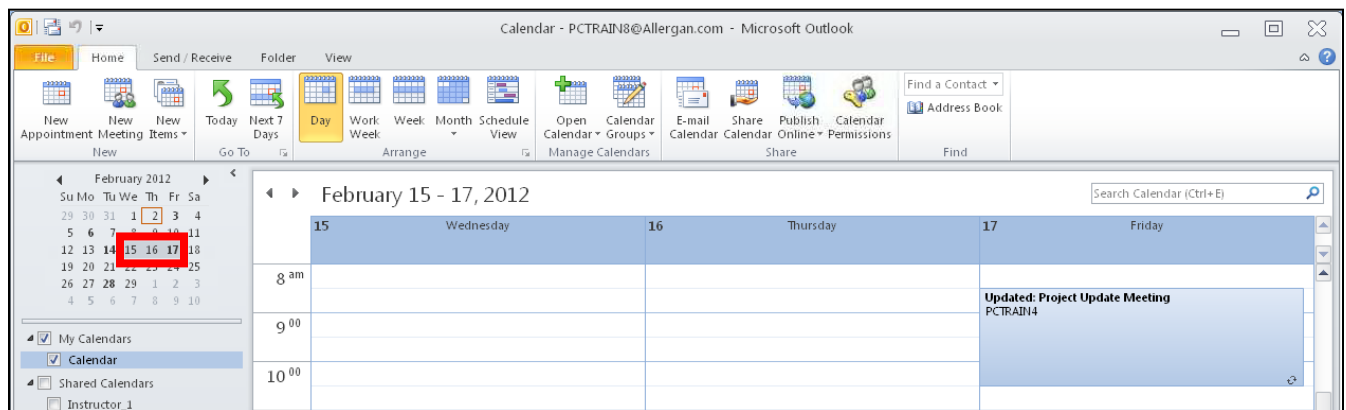
Calendar - Selecting Different Day Views

Your Outlook Calendar can be displayed in a number of different formats using the buttons on the **Home** tab of the Ribbon, as shown below.



In addition, you can control the number of days displayed in the calendar by pressing **[Alt]** + a number at the top of the keyboard (not the numeric keypad). For example, pressing **[Alt]+[3]** would display 3 days, while **[Alt]+[0]** would display 10 days.

Finally, you can view specific days by dragging the mouse across those days in the Date Navigator, as shown below.

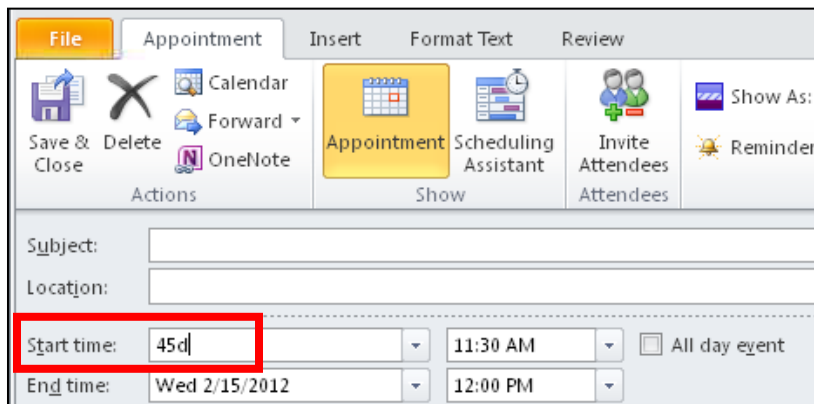


Tip: You can select non-adjacent dates in the Date Navigator by clicking the first date and then pressing the **[Ctrl]** while clicking any additional dates you wish to view.

Use Natural Language for Dates

Have you ever had to look up or schedule something on a date a certain number of days in the past or future? Outlook makes it easy to do this. Simply use the following techniques in any date field such as the Start Time field of an Outlook appointment or the Start Date or Due Date fields of a Task. You can also use these techniques to navigate to a particular date in the Calendar by pressing [Ctrl]+[G]. Some examples are listed below.

To schedule an Appointment 45 days in the future, create a new Appointment and replace the current date with **45d**. When you press [Tab], the date 45 days in the future is automatically entered.



Tip: When referring to years use **y**, for months use **mo**, for weeks use **w** and for days use **d**.

Tip: To find a date 90 days after August 30, type **8/30 + 90d** and press [Tab].

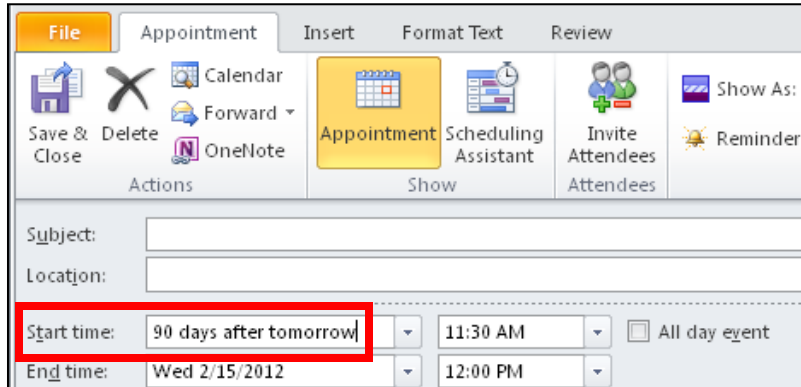
Natural language shortcuts allow even more power when searching for a past or future date. Some of the basic keywords that Outlook understands are:

- day
- week
- month
- year
- now
- before
- next
- after
- last
- this
- ago
- today
- yesterday
- tomorrow

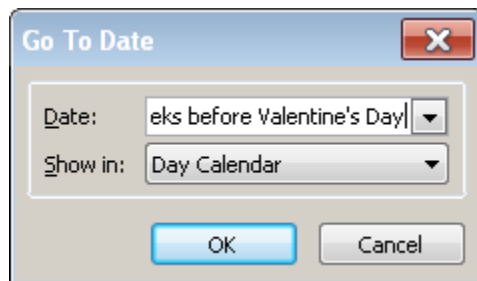
Outlook also understands the days of the week (Monday, Tuesday, etc) and many holidays that are fixed on specific days such as:

- New Year's Day
- Valentine's Day
- Washington's Birthday
- Saint Patrick's Day
- Independence Day
- Halloween
- Christmas Eve
- Christmas
- New Year's Eve

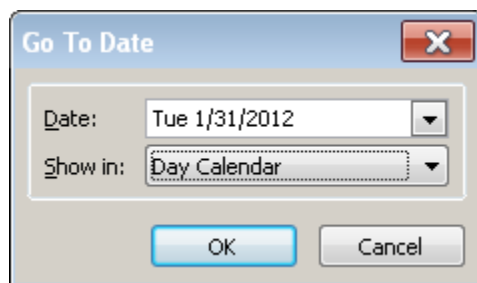
For example, if you create a new Appointment and replace the current date in the Start time field with **90 days after tomorrow** and press **[Tab]**, the date 90 days after tomorrow's date is entered into the Start time field.



Finally, let's say we need to navigate to the date 2 weeks before Valentine's Day. This time, we'll press **[Ctrl]+[G]** and type in **2 weeks before Valentine's Day**, as shown below.



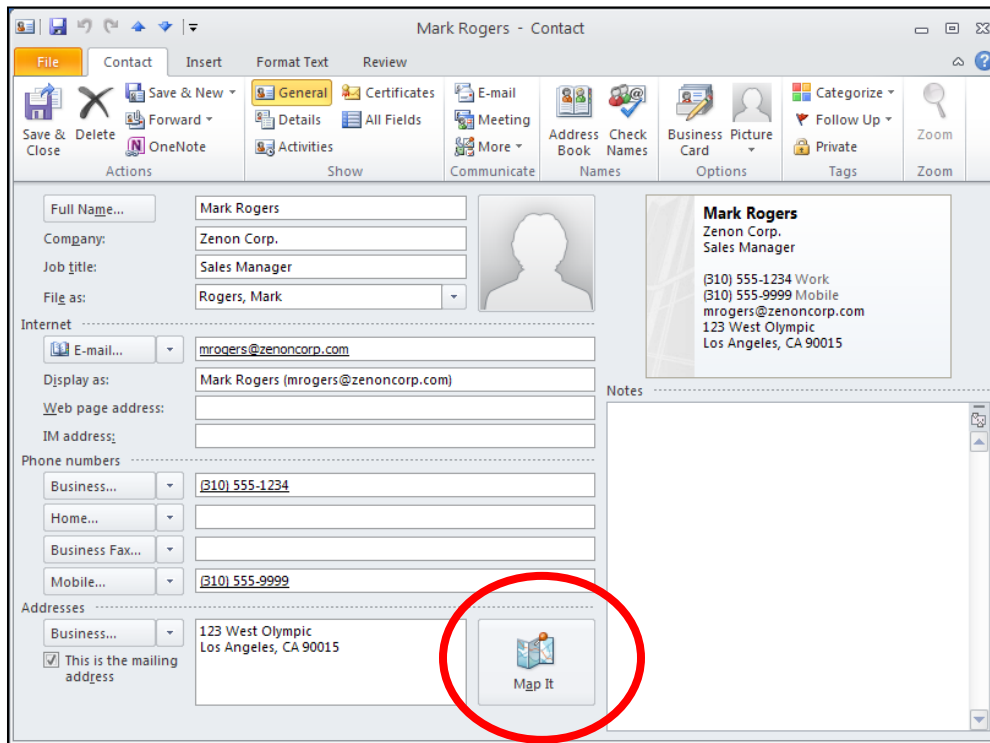
When we press **[Tab]** the date representing 2 weeks before Valentine's Day (January 31) is automatically inserted into the Date field, as shown below.



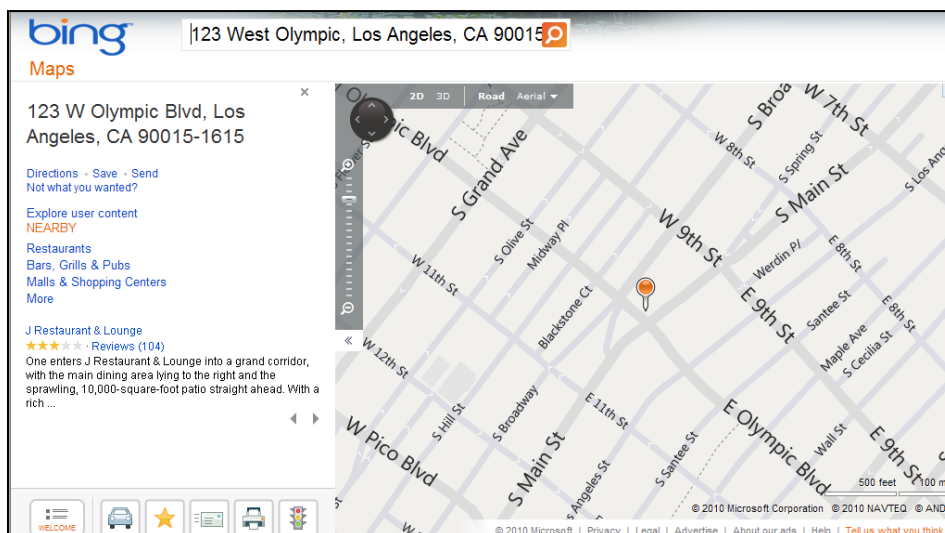
Tip: Outlook also allows you to quickly enter time into a time field. You can omit the colon, spaces, and even the AM or PM and Outlook will know what time you mean. For example, type **830a** into a time field and Outlook knows you mean 8:30 AM. Type **235p** and Outlook knows you want 2:35 PM.

Mapping a Contact

You can map out any address in your Contacts folder. To map the address of a contact, double-click the contact to open that contact's information. On the *Contact* tab of the Ribbon, click the **General** button, if necessary. To the right of the *Addresses* field, click the **Map It** button, shown below.



When you click the Map It button, you are connected to the Internet and a map of the specified location is displayed using Bing Maps search feature. Your map will look something like that shown below.



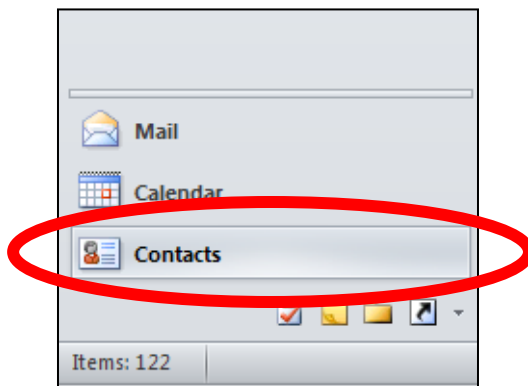
Contact Groups

A *Contact Group* is a collection of contacts, making it easy to send messages to a group of people or invite a group of people to a meeting. For example, if you frequently send messages to all of the people in your department, you can create a contact group called My Dept that contains the names of all members of your department. A message sent to this contact group goes to all people in your department. Recipients see their own names and the names of all other recipients on the To line of the message, instead of seeing the name of the distribution list.

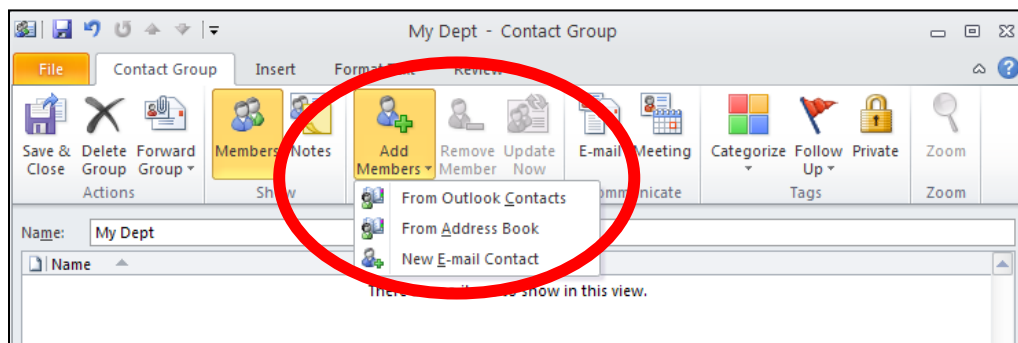
Contact groups that you create are stored in your Contacts folder and are available only to you, but you can share them by copying and sending them to others. You can use contact groups in messages, task requests, meeting requests, and other distribution lists. In addition, you can add and delete names in a contact group, send it to others, and print it.

To create a personal contact group:

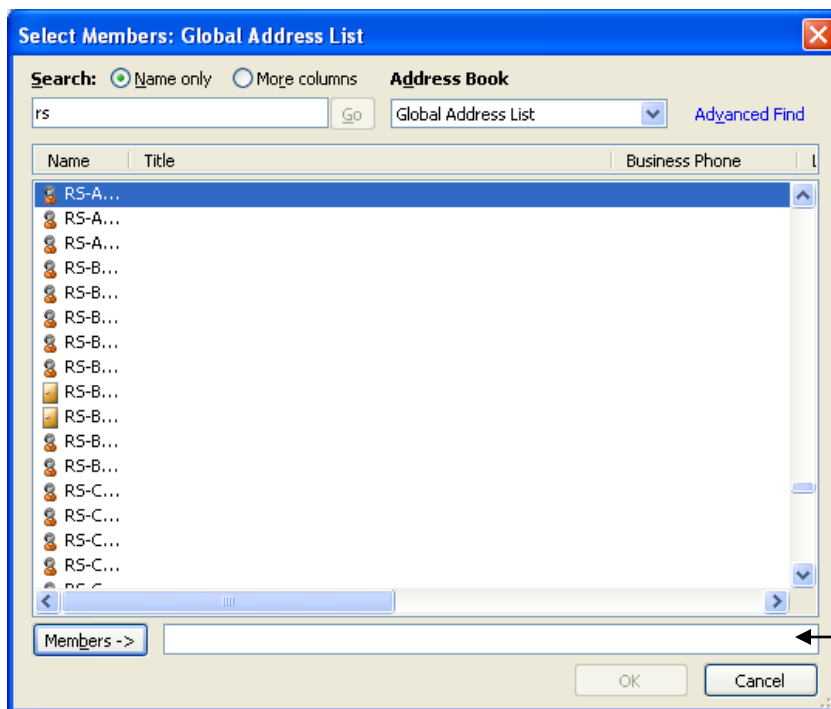
1. In the Navigation Pane, click on the **Contacts** button.



2. On the **Home** tab of the Ribbon, click the **New Contact Group** button.
3. In the Name box, type a name for this contact group.
4. On the **Contact Group** tab, click the **Add Members** button and select the location of the first name to be added to the group.



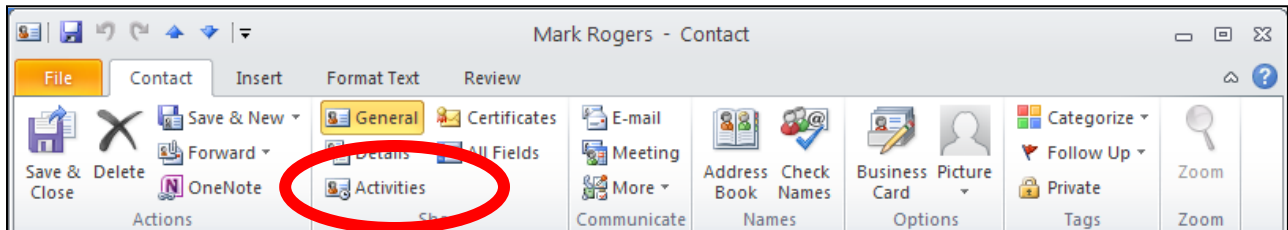
5. In the *Search:* box, type the first few letters of the name of the person you wish to add to the Contact Group.
 6. Choose the name from the list and click the **Members->** button.
 7. Repeat steps 5 and 6 for the remaining members of the contact group that will be added from this location.
 8. When all names have been added, click the **OK** button.
 9. If you wish to add names from another source, click the **Add Members** button and select the location of the next name to be added to the group. Add the names as described in steps 5-8.
 10. When you have added all of the members of the contact group, click the **Save & Close** button on the *Contact Group* button on the Ribbon.
- Tip: You can also copy and paste a list of names from Excel or Word into the **Members->** list of the Select Members dialog box.



Copy user names from Excel or Word and paste here to avoid having to manually look up the names

Understand Contact Linking

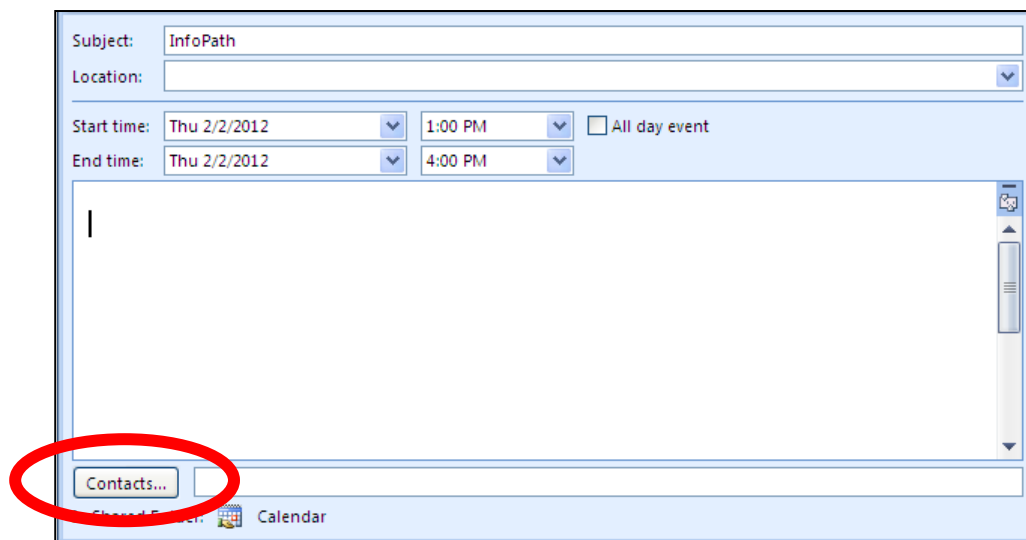
All messages sent to or from one of your contacts are automatically linked to that contact. Meetings organized by a contact or meetings where the contact was invited and tasks assigned to or by a contact are also automatically linked to that contact. To see all linked messages and meetings, open the contact in question and click the **Activities** button on the **Contact** tab of the Ribbon, as shown below.



You can manually link other messages, calendar items and tasks to a contact. This feature is disabled by default. To enable this feature:

1. Click **File** tab of the Ribbon.
2. Click **Options**.
3. Click the **Contacts** category on the left side of the window.
4. On the right side of the window, in the Linking section, click **Select Show contacts linked to the current item** to place a check mark in the box.
5. Click **OK**.

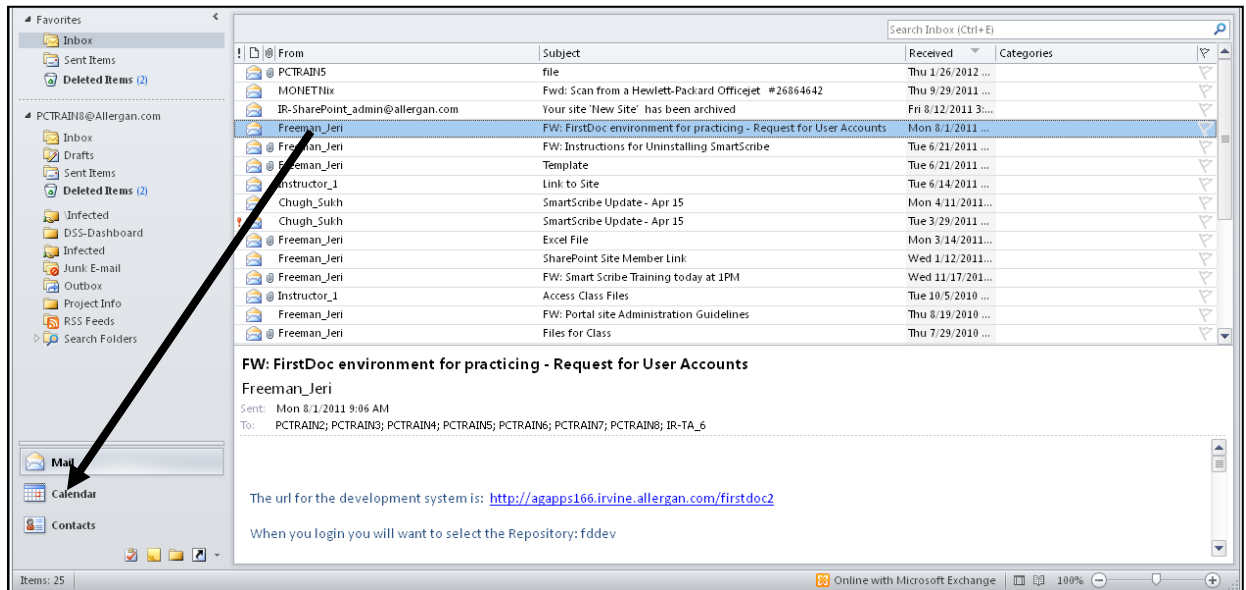
Once this feature has been enabled, you can manually link messages, task or calendar item to a contact by opening that message, task or calendar item, clicking the **Contacts** button and selecting the desired contact(s) in the Select Contacts dialog box.



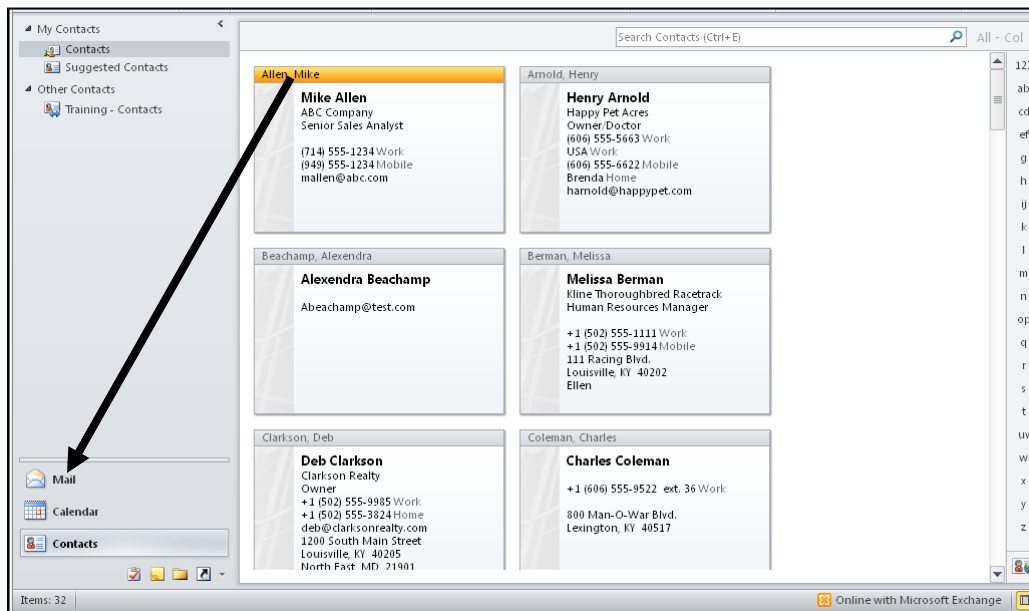
Creating Outlook Items from Other Outlook Items

Use the following tips to quickly create Outlook items from existing items.

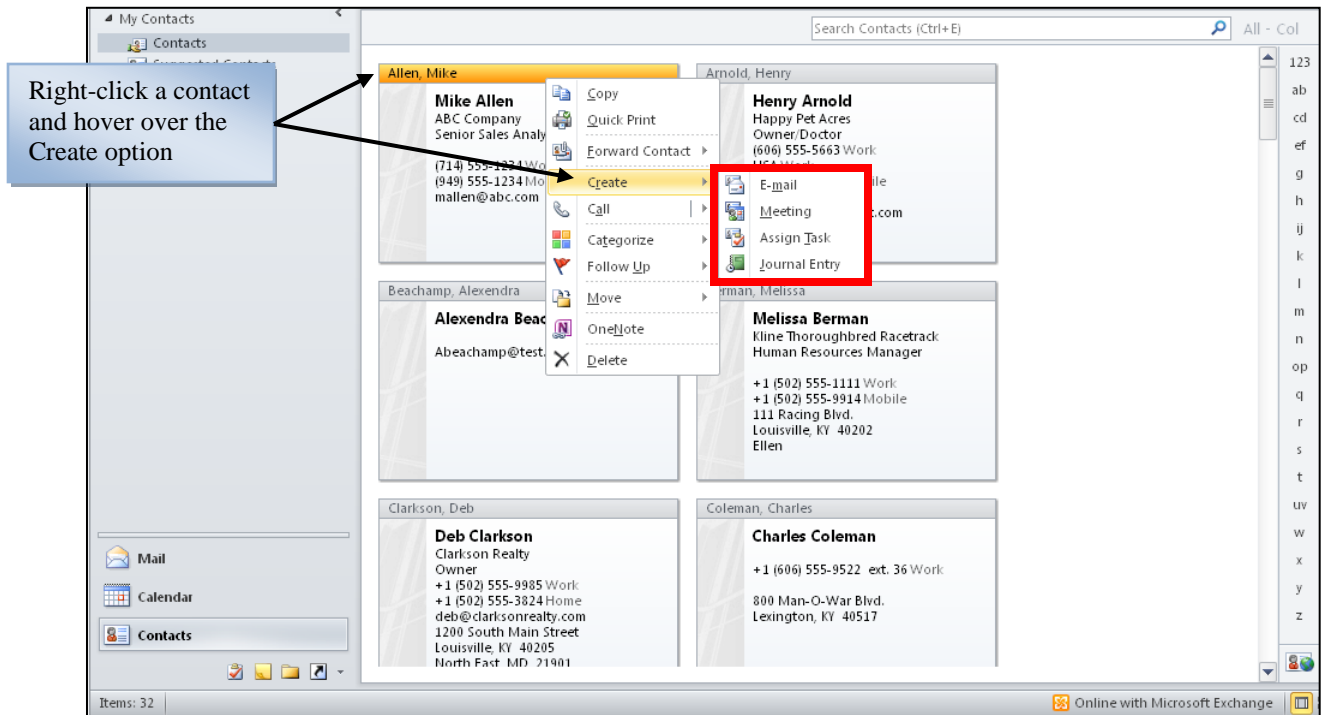
- Quickly turn an e-mail message into a Calendar item by dragging it to the Calendar button in the Navigation Pane, editing the Start time and End time as necessary and clicking Save & Close.



- Quickly add the Sender of a message to your Contacts by dragging the message to the Contacts button in the Navigation Bar.
- Address an e-mail message to a contact by dragging that contact to the Mail button in the Navigation Bar.

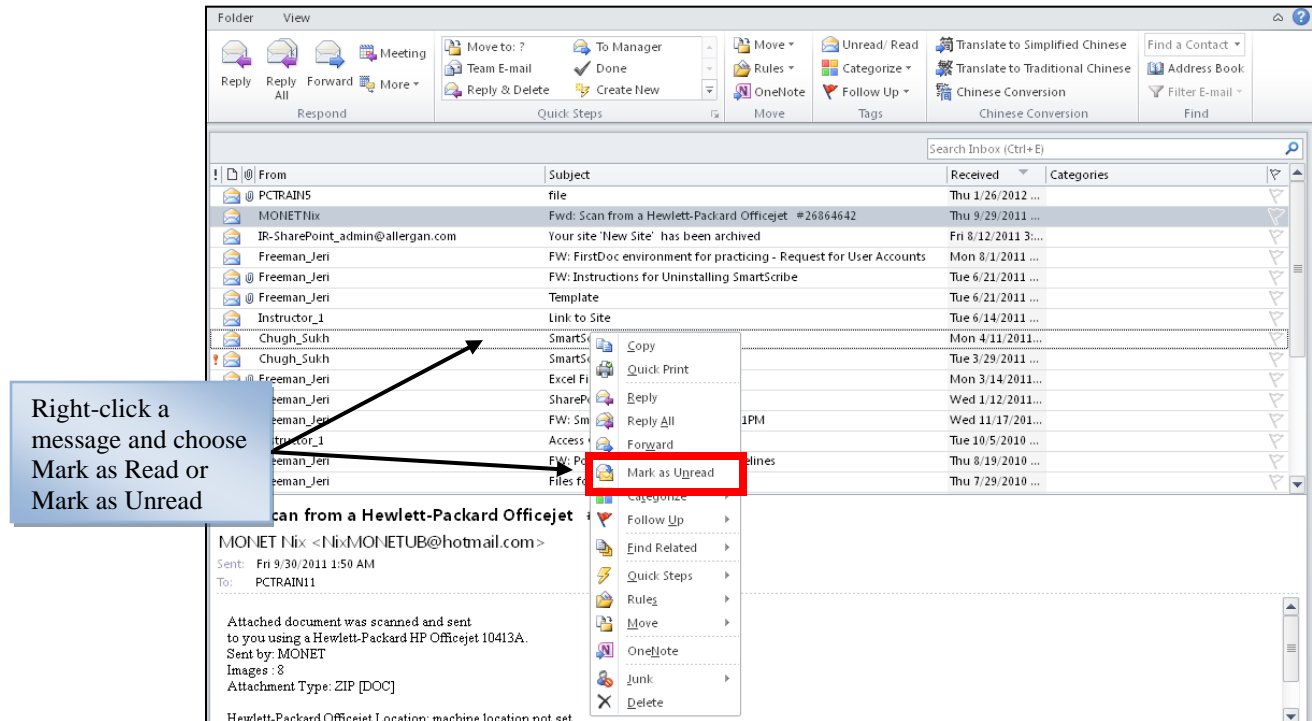


- Right-click a Contact and hover over Create to send an e-mail to that contact, schedule a meeting with that contact, assign a task to that contact or create a journal entry for that contact.

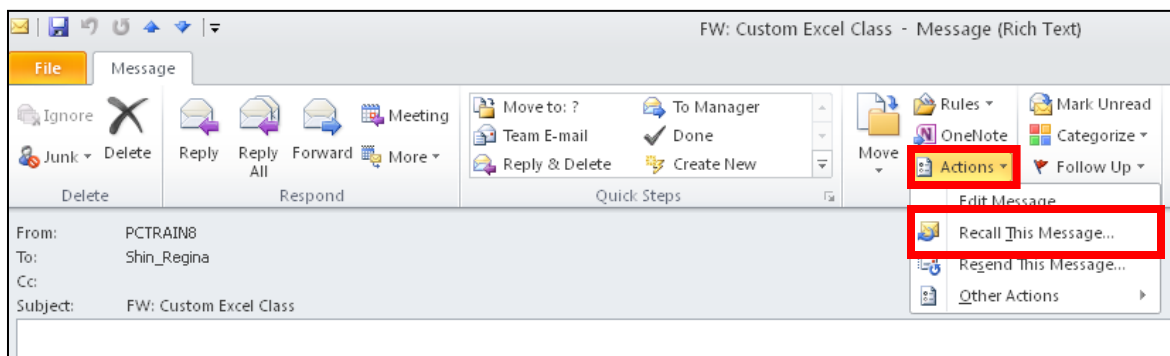


Miscellaneous Outlook Tips & Tricks

1. Quickly mark a message as read or unread by right-clicking the message in the message list and selecting **Mark as Read** or **Mark as Unread**.

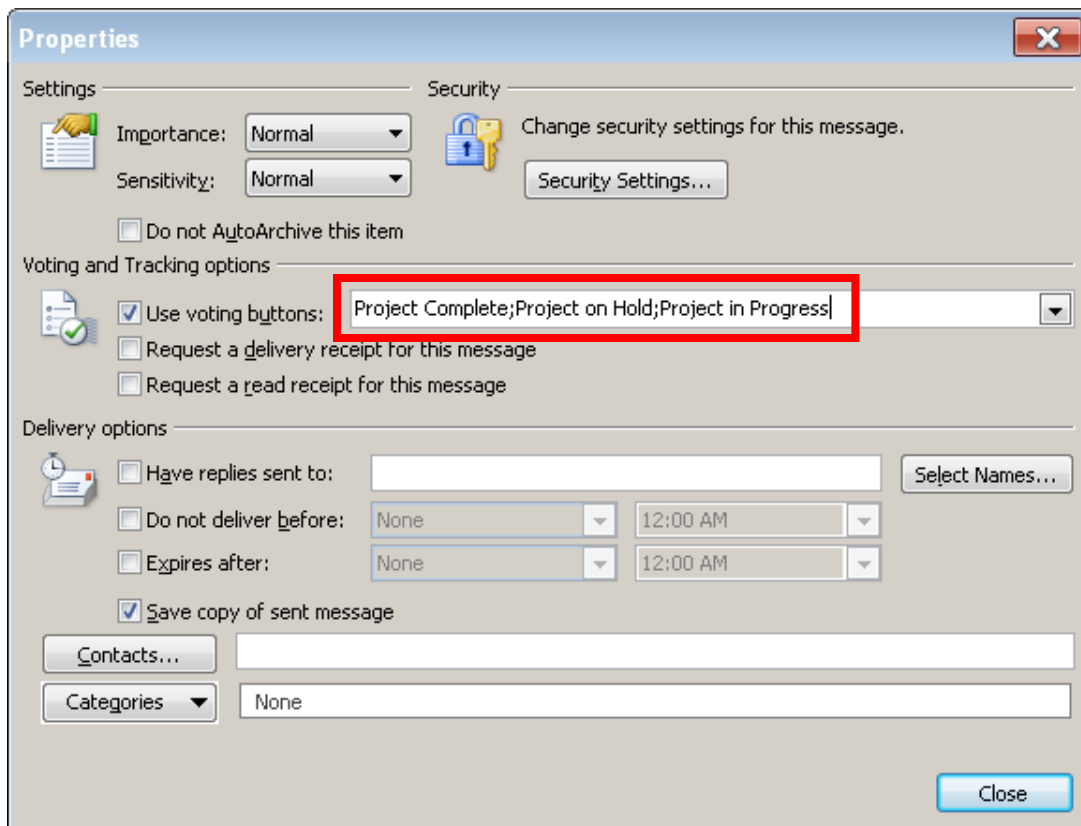


2. Recall a message you have sent by opening that message in the Sent Items folder and clicking the **Actions** button on the *Message* tab of the Ribbon. Select **Recall This Message** from the drop-down menu. If the recipient has not yet opened the message, it will be removed from their mailbox.

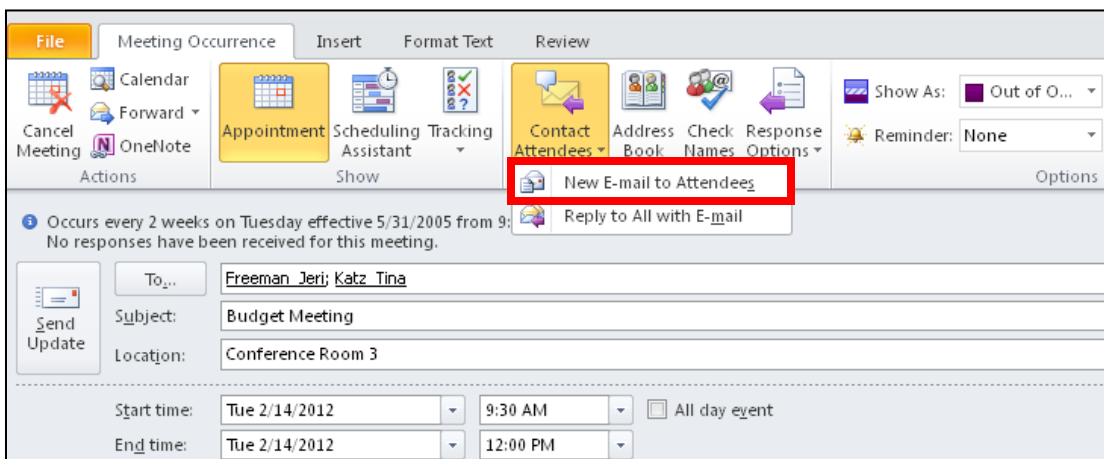


3. Quickly test a hyperlink you have typed in a message before you send the message by holding down the **[Ctrl]** key while you click the hyperlink.
4. Quickly create a Word document, Excel workbook or PowerPoint presentation from Outlook by pressing **[Ctrl]+[Shift]+[H]**.

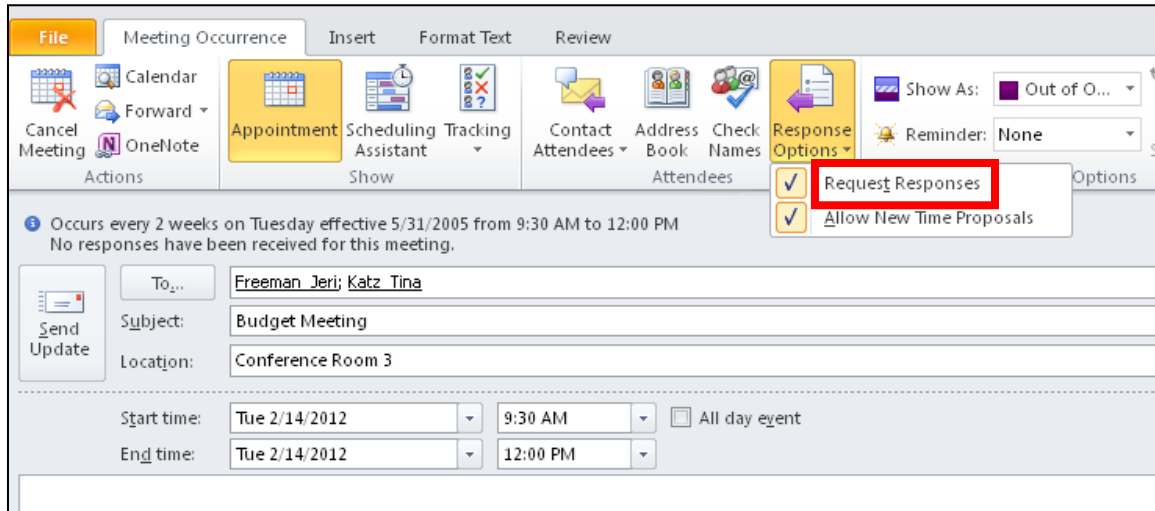
5. Customize the text displayed in Vote button drop-down menu of a message you are sending by clicking **Use Voting Buttons** on the **Options** tab of the Ribbon and selecting **Custom**. Type the items to be displayed on the drop-down in the Use voting buttons field, separating each name with a semicolon, as shown below.



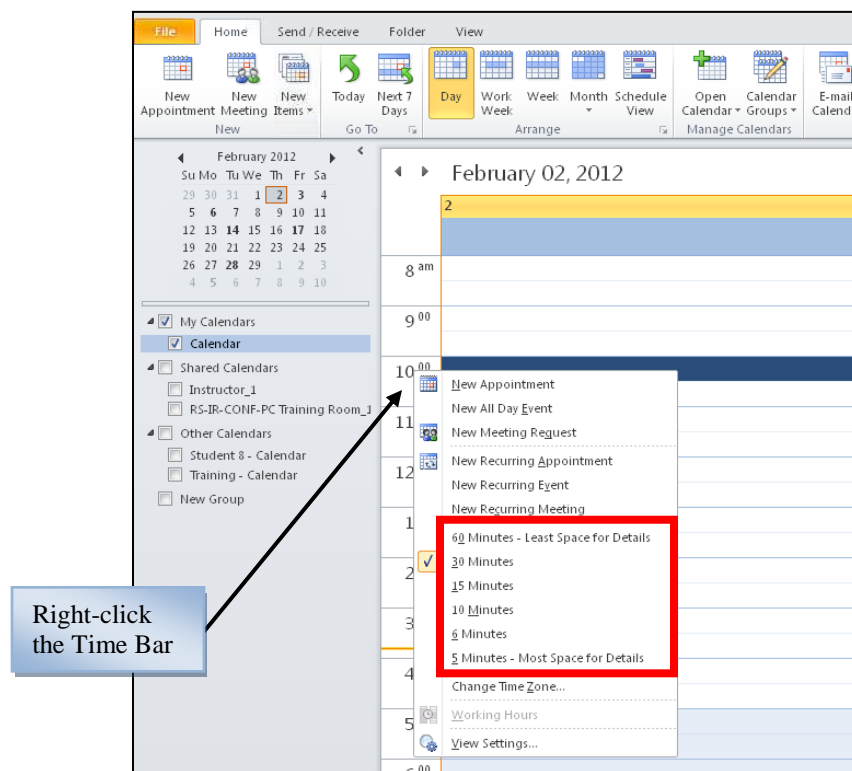
6. Quickly send a reminder or other message to the attendees of a meeting by opening the original meeting request, clicking the **Contact Attendees** button on the **Meeting Occurrence** tab of the Ribbon and selecting **New E-mail to Attendees**.



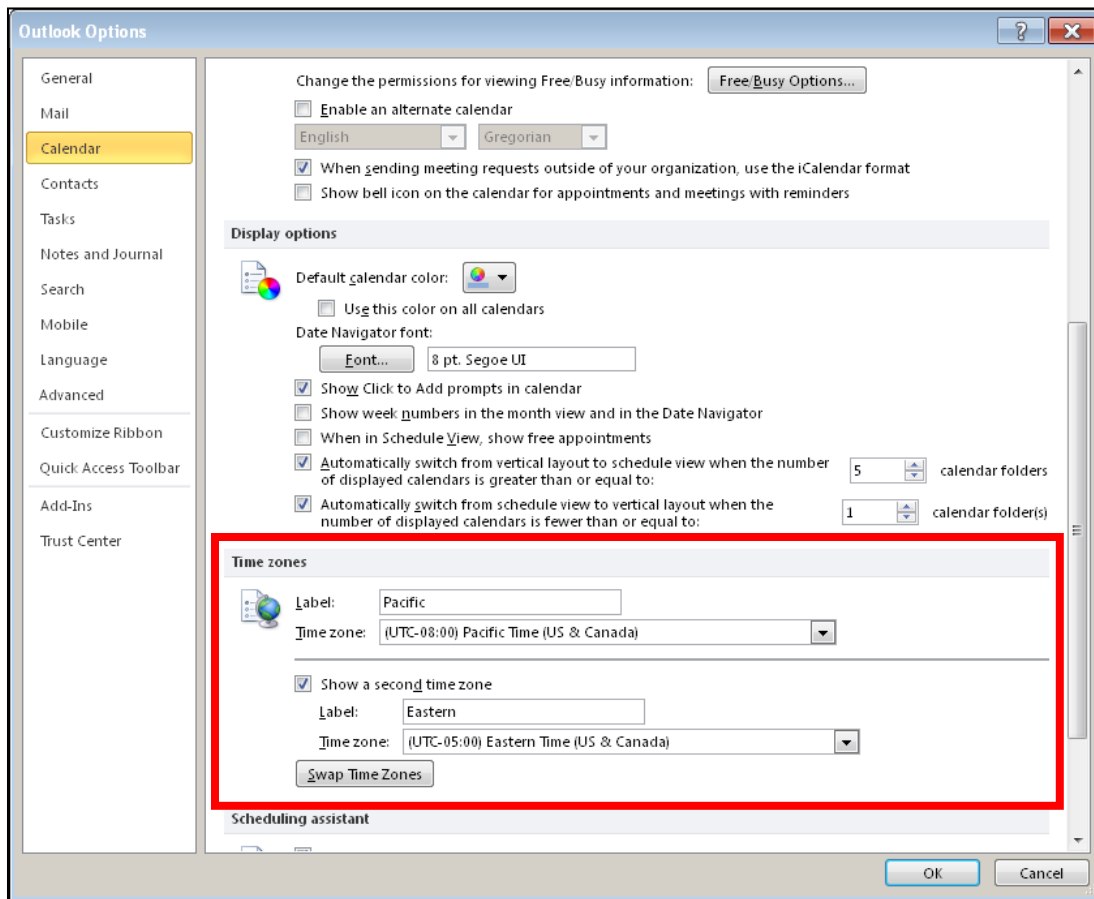
- If you are sending a Meeting Request to a large group and don't want to receive responses to this request, click the **Response Options** button on the **Meeting Occurrence** tab and select **Request Responses** to disable this feature before sending the request.



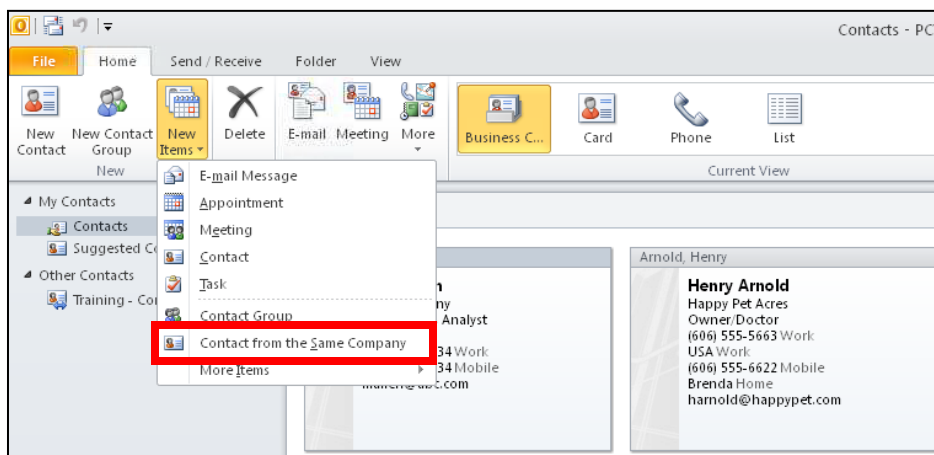
- The Outlook Calendar displays 30 minute time slots by default. To change the length of the time slots in the Calendar, right-click the Time Bar and select the desired option.



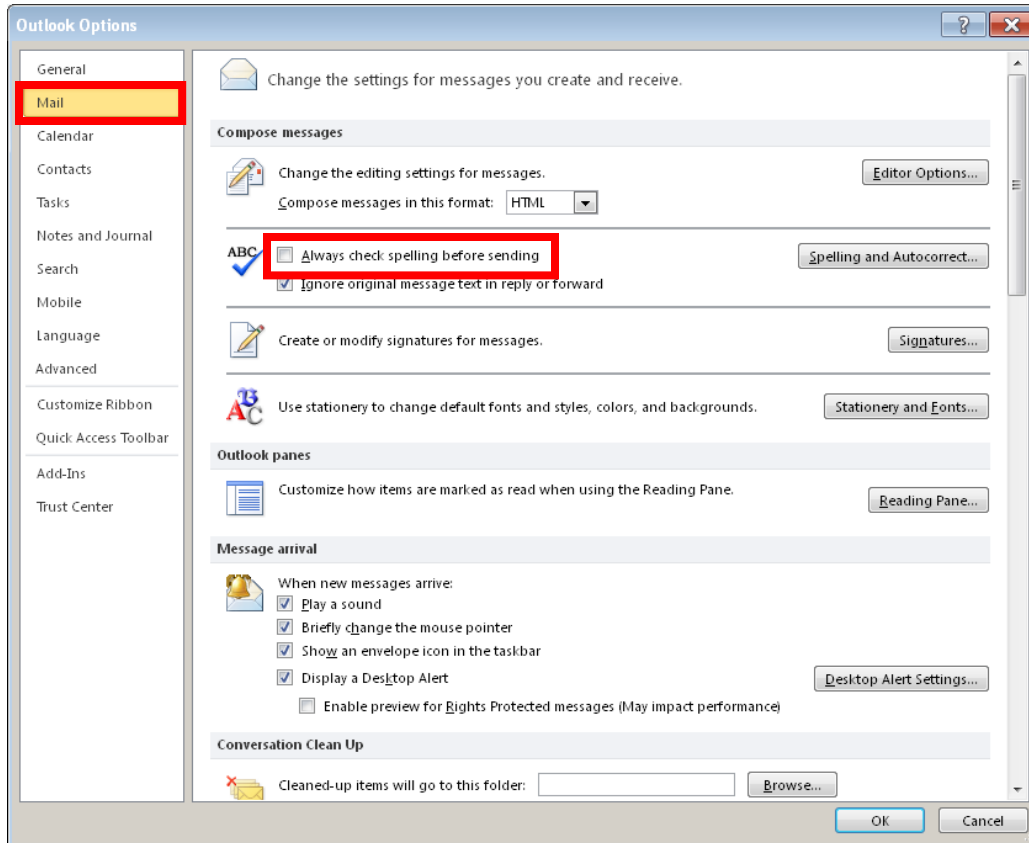
9. Add a second time zone to your Calendar by right-clicking the Time Bar and selecting **Change Time Zone**. Complete the Time zones options as desired and click **OK**.



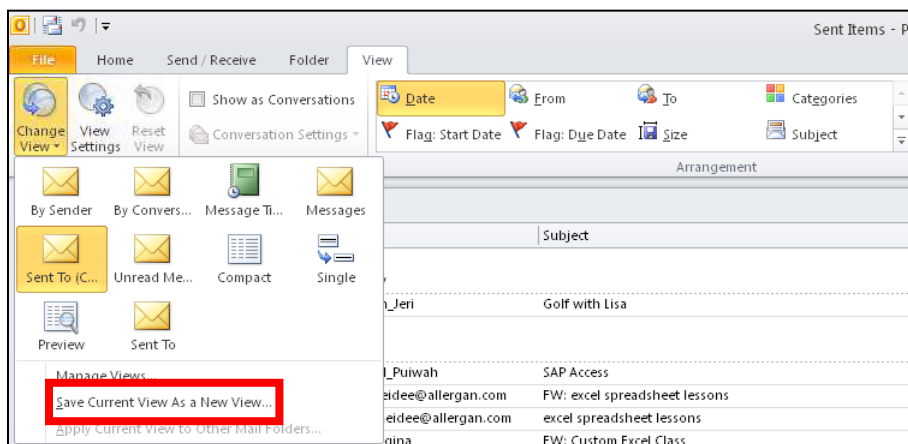
10. Quickly create a contact with the same company name and address as an existing contact by selecting the existing contact, clicking the **New Items** button on the **Home** tab of the Ribbon and selecting **Contact from the Same Company**.



- Have Outlook automatically spell check all of your outgoing messages by selecting **Options** from the **File** tab. In the **Mail** category, click the **Always check spelling before sending** check box to enable that feature.



- If you have customized the view of your Inbox, Calendar or any other folder, you can save this customized view for reuse by clicking the **Change View** button on the **View** tab of the Ribbon and selecting **Save Current View As a New View**. Type a name for the view and click **OK**. The newly named view will now appear on the drop-down list whenever you navigate to this folder.



Useful Outlook Keyboard Shortcuts

Press this key combination	To accomplish this task
[Alt]+[F1]	Cycle the Navigation Pane on, minimized and off
[Ctrl]+[Shift]+[M]	Create a new mail message
[Ctrl]+[Shift]+[C]	Create a new contact
[Ctrl]+[1]	Switch to Mail view
[Ctrl]+[2]	Switch to Calendar view
[Ctrl]+[3]	Switch to Contacts view
[Ctrl]+[4]	Switch to Tasks view
[Ctrl]+[5]	Switch to Notes view
[Ctrl]+[R]	Reply to the sender of the current mail message
[Ctrl]+[Shift]+[R]	Reply to the sender and all recipients of the current mail message
[Ctrl]+[F]	Forward the current mail message
[Ctrl]+[D]	Delete the current mail message
[Shift]+[Click]	Select all messages between the currently selected message and the one on which you [Shift]+[Click]
[Ctrl]+[Click]	Select the message(s) on which you [Ctrl]+[Click], in addition to any other selected messages
[Ctrl]+[A]	Select all items in a folder
[Alt]+[S]	Send the current message or save the current contact, calendar item, etc.
[Ctrl]+[Shift]+[I]	Switch to the Inbox