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Migrating to Outlook 2010

from Outlook 2003

In This Guide

Microsoft Outlook 2010 looks very different from Outlook 2003, so we created this guide to help you minimize the learning curve. Read on to learn about key parts of the new interface, find free Outlook 2010 training, and locate features such as the Out of Office Assistant, the Outlook Options dialog box, and the Import and Export Wizard.

Quick Access Toolbar

Commands shown here are always visible. You can add your favorite commands to this toolbar.

Ribbon Tabs

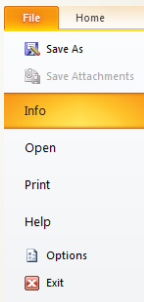
Click any tab on the ribbon to display its buttons and commands.

Ribbon Groups

Each ribbon tab contains groups, and each group contains a set of related commands. Here, the **Respond** group contains commands to reply to or forward a selected e-mail message.

Backstage View

Click the **File** tab to enter Backstage view, where you can modify account settings, set automatic replies, and manage rules and alerts.



To exit Backstage view, click any ribbon tab.

Navigation Pane

Favorite folders are displayed at the top of the pane. The center area displays all active folders. In the bottom area of the pane, click a button to choose a view: **Mail**, **Calendar**, **Contacts**, and so on.

In each view, the ribbon tabs change, displaying the appropriate buttons and commands for that view.

People Pane

The Outlook Social Connector connects Outlook to your social networks. By default, it appears minimized at the bottom of the Reading Pane.

Reading Pane

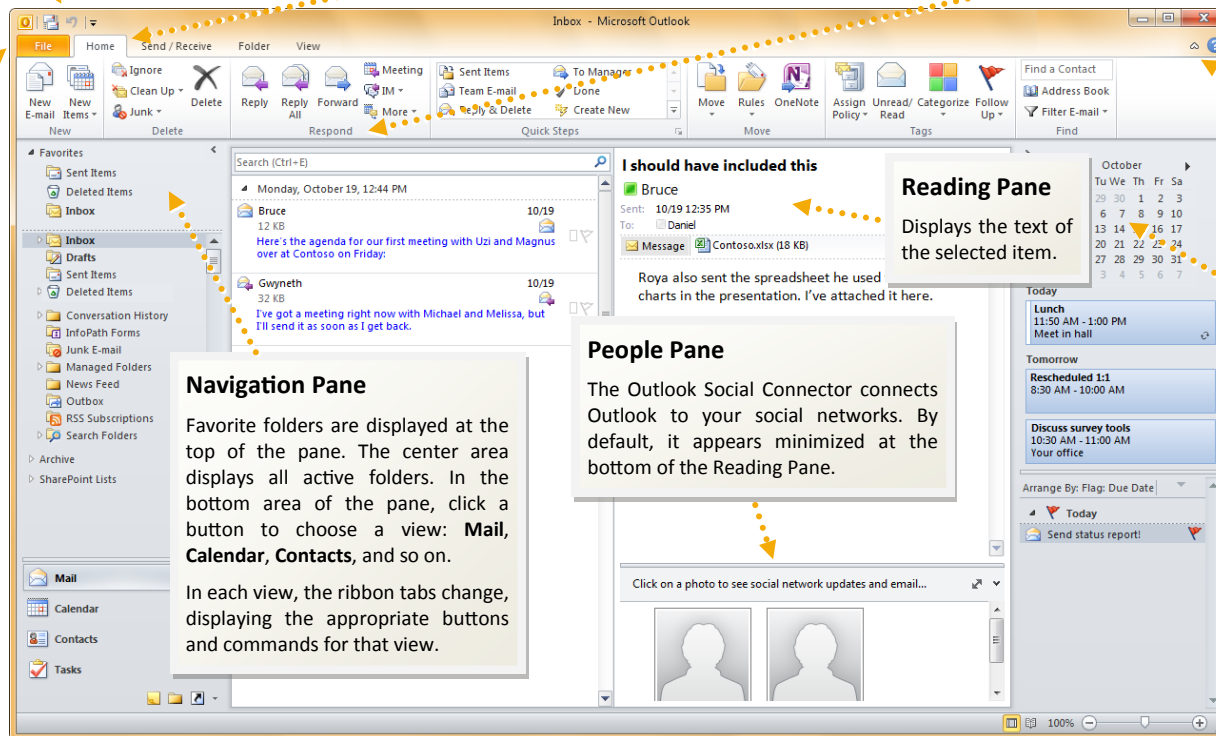
Displays the text of the selected item.

Hide the Ribbon

Need more space on your screen? Click this icon or press CTRL+F1 to hide or show the ribbon.

To-Do Bar

This resizable bar displays the Date Navigator, your Appointments, and your Task List.



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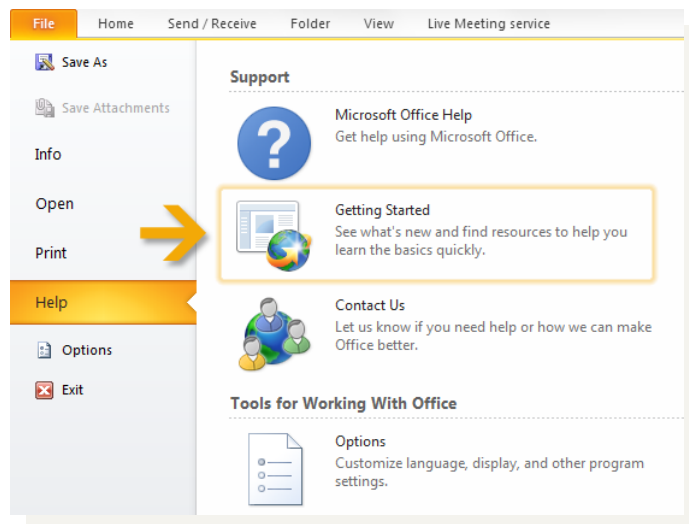
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How to get started with Outlook 2010

If you've been using Microsoft Outlook 2003 for a long time, you'll no doubt have questions about where to find Outlook 2003 commands and toolbar buttons in Outlook 2010.

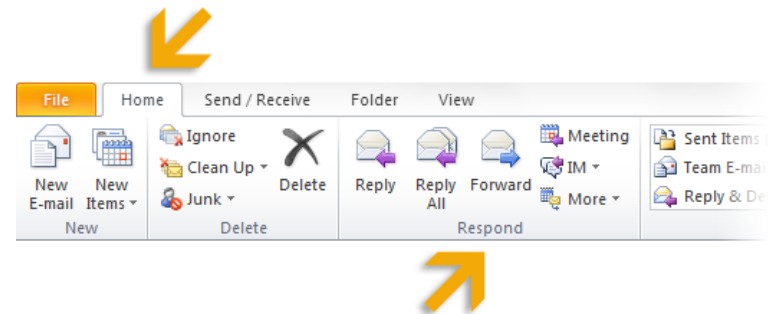
We have many free resources available to help you learn Outlook 2010, including training courses and menu-to-ribbon guides. To find these resources, click the **File** tab, and then click **Help**. Then, under **Support**, click **Getting Started**.



Where are my menus and toolbars?

In Outlook 2010, a wide band spans the top of the main program window. This is the ribbon, and it replaces the old menus and toolbars. Each tab on the ribbon has different buttons and commands that are organized into ribbon groups.

When you open Outlook 2010, the ribbon's **Home** tab for Mail is displayed. The first thing you'll see on the left side of the tab is the **New** group, with the commands to create **New E-mail**, or **New Items** (such as **Appointment**, **Meeting**, and **Contact**).



In the **Respond** group, you'll find commands to **Reply**, **Reply All**, and **Forward**, as well as the commands to reply by setting up a meeting, or reply with an **IM** (Instant Message).

The ribbon adjusts its appearance to fit your computer's screen size and resolution. On smaller screens, some ribbon groups may display only their group name, not their commands. In that case, simply click the small arrow on the group button to reveal the commands.

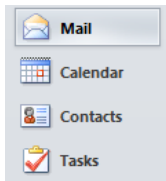
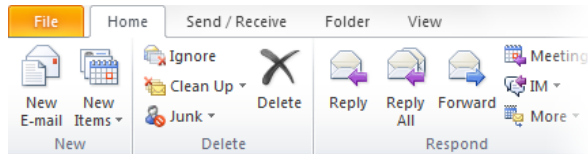
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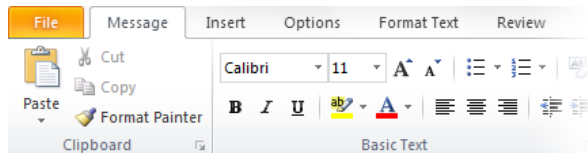
Commands when you need them

Rather than attempting to show you all available commands all of the time, Outlook 2010 shows you only the commands that you need in response to specific actions you take.

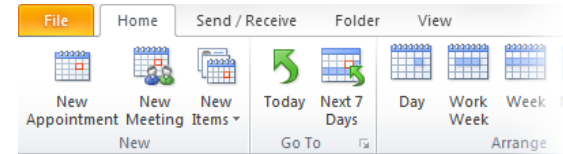


For example, when you click **Mail** on the Navigation Pane, you'll see the commands to work with mail on the ribbon. You can send, delete, or reply to messages, mark messages as read or unread, or categorize or flag messages for follow-up.

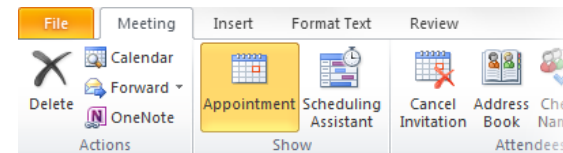
To send new mail, click **New E-mail** on the ribbon. The window that opens has the commands you'll need to format text, to get a name from the **Address Book**, to attach files or Outlook items to the mail, or to add an electronic signature to the mail.



Similarly, when you click the **Calendar** button on the Navigation Pane, you'll see the commands for working with and sharing calendars, creating meetings, and arranging your calendar by day, week, or month.



To schedule a meeting, click **New Meeting** on the ribbon. The window that opens has meeting commands such as the **Scheduling Assistant**, the **Address Book**, and recurrence options if you want the meeting to be daily, weekly, monthly, or yearly.



Don't worry if you don't see all the commands you need at all times. Take the first steps and the commands you'll need will be at hand.

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Things you might be looking for

Look over the table below to find some of the commands and settings that you might be looking for in Outlook 2010. Although this list isn't comprehensive, it's a good place to start. To find the full list of Outlook 2010 commands, click the **File** tab, click **Help**, click **Getting Started**, and then select **Interactive menu to ribbon guides**.

To...	Click...	And then...
Share calendars	Calendar	On the Home tab, in the Share group, click E-mail Calendar , Share Calendar (requires a Microsoft Exchange Server account), or Publish Online .
View attachments in Outlook without opening the attachments in a separate window	Mail	First, turn on the Reading Pane, if it is not visible. To do so, click the View tab, and in the Layout group, click the arrow on Reading Pane to select where to display the pane. Then, to view the attachment, click the attachment icon in the Reading Pane to preview the file. You should preview or open attachments only from trustworthy sources.
Automatically reply to messages (Out of Office Assistant)	Mail, Calendar, Contacts, and so on	Click the File tab, click Automatic Replies , select Send automatic replies , create your message, and then select the options you want. (Requires a Microsoft Exchange Server account.)
Recall a message	Mail	On the Navigation Pane, click Sent Items , and then open the message that you want to recall. On the Message tab, in the Move group, click Actions , and then click Recall This Message . You can then delete the sent message and, if you want to, replace it with a new one. (Requires a Microsoft Exchange Server account.)
Find items with instant search	Mail, Calendar, Contacts, or wherever you want to search	On the Navigation Pane, click the folder you want to search. In the Search box, type your search text. You can select search criteria in the Refine group on the Search Tools tab. Widen your search by clicking All Mail Items in the Scope group on the Search Tools tab.
Change account settings	Mail, Calendar, Contacts, and so on	Click the File tab, click Info , and then click Account Settings .

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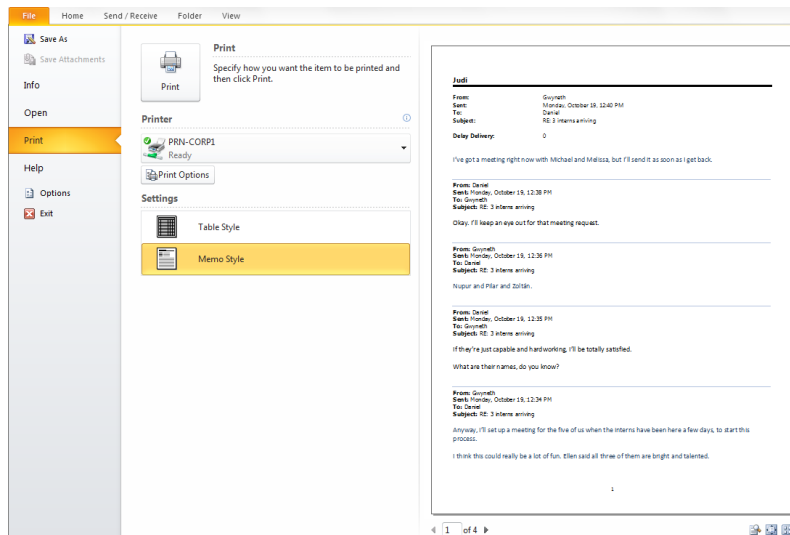
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Where is Print Preview?

In Outlook 2010, look for Print Preview in Backstage view.

Click the **File** tab, and then click **Print**. The right side of the window shows a preview of how the selected item will look when printed.

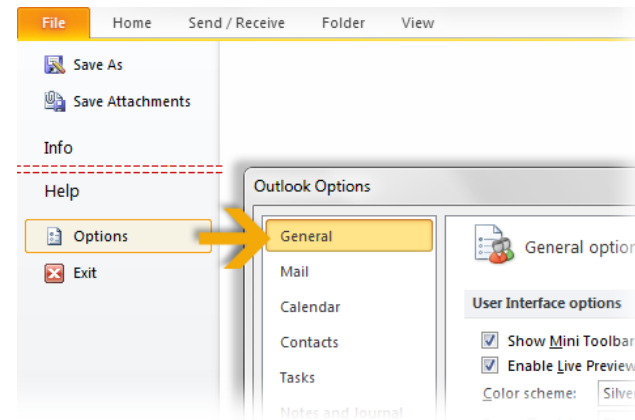


Click **Print Options** to open the **Print** dialog box, where you can make print-related selections.

What happened to Tools | Options?

Looking for the program settings that let you control things like whether Outlook automatically checks spelling before sending, whether sounds play when a new message arrives, or whether the outgoing message is formatted in HTML, Rich Text, or Plain Text?

Click the **File** tab, and then click **Options**. This opens the **Outlook Options** dialog box, where you can customize your Outlook preferences.



Some settings in the **Outlook Options** dialog box apply only to Outlook. But some preferences (for example, the color scheme) will apply to all other Microsoft Office 2010 programs that you have installed.

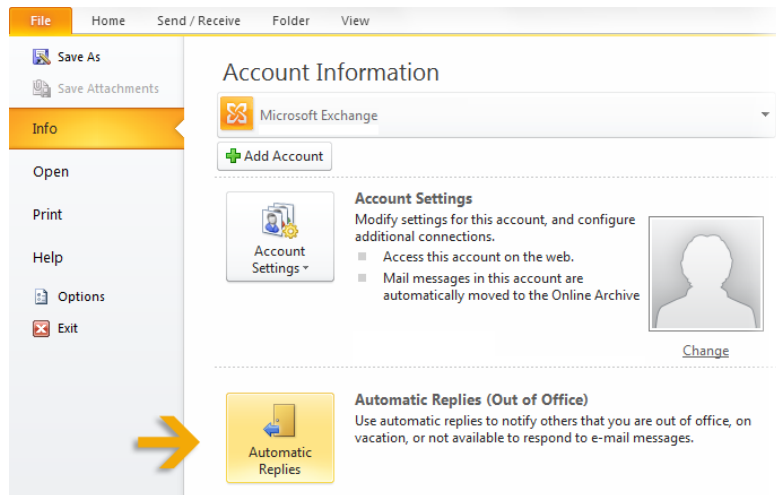
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Where is the Out of Office Assistant?

In Outlook 2010, the Out of Office Assistant has a new name and a new location. You can now find it in Backstage view. Click **File**, click **Info**, and then click **Automatic Replies**.

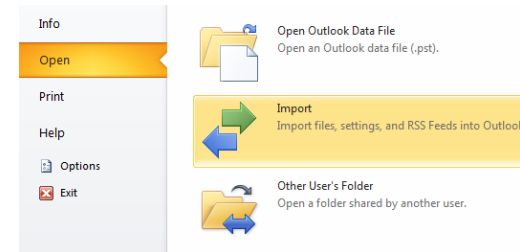


In the **Automatic Replies** dialog box, select the **Send automatic replies** option, and then create the replies you want Outlook to send on your behalf when you're away or unavailable.

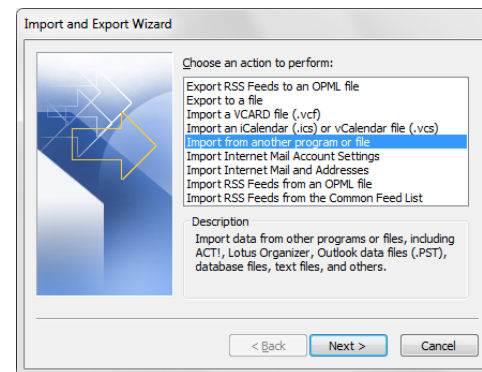
Note This feature requires a Microsoft Exchange Server account.

What happened to Import and Export?

In Outlook 2010, you can still export and import items. For example, you might export a .pst (Personal Folders) file from Outlook, or import an .ics (iCalendar) file into your Outlook calendar.



In the main program window, click **File**, click **Open**, and then click **Import** to open the **Import and Export Wizard**. Just as in Outlook 2003, follow the steps in the wizard to either import or export information.



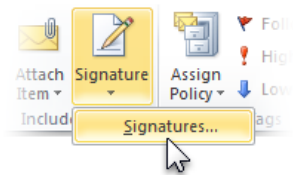
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Create an e-mail signature

Start by opening a new message. On the **Message** tab, in the **Include** group, click **Signature**, and then click **Signatures**.



On the **E-mail Signature** tab, click **New**. Type a name for the signature, and then click **OK**. In the **Edit signature** box, type the text that you want to include in the signature.

To format the signature, select it, and then use the style and formatting buttons to apply the options you want. To add elements other than text, click where you want the element to appear, and then do any of the following:

- Click **Business Card**, click your name in the **Filed As** list, and then click **OK**.
- Click **Picture**, browse to a picture to select it, and then click **OK**.
- Click **Insert Hyperlink**, enter a hyperlink in the **Address** box, and then click **OK**.

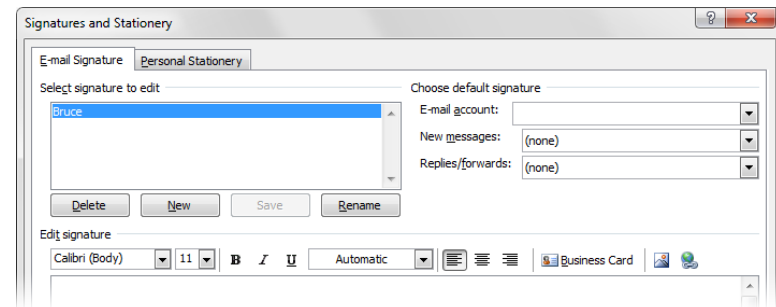
Click **OK** to finish creating or modifying the signature.

Note The signature you just created or modified won't automatically appear in the message that's currently open. It must be manually inserted into the message.

Add a signature to new e-mail messages

To add a signature to messages automatically, do the following:

On the **Message** tab, in the **Include** group, click **Signature**, and then click **Signatures**.



Under **Choose default signature**, in the **E-mail account** list, click an e-mail account with which you want to associate the signature. In the **New Messages** list, select the signature that you want to include. If you want a signature to be included when you reply or forward messages, in the **Replies/forwards** list, select the signature. Otherwise, select **(none)**.

To manually add a signature to a new message, do the following:

In a new message, on the **Message** tab, in the **Include** group, click **Signature**, and then click the signature that you want.

Tip To remove a signature from a message that's currently open, select the signature in the message body, and then press DELETE.

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Introducing KeyTips

Outlook 2010 provides shortcuts for the ribbon, called KeyTips, so you can quickly perform tasks without using your mouse.



To make KeyTips appear on the ribbon, press the ALT key.

Next, to switch to a tab on the ribbon using your keyboard, press the key of the letter displayed under that tab. In the example shown above, you would press S to open the **Send/Receive** tab, O to open the **Folder** tab, V to open the **View** tab, and so on.

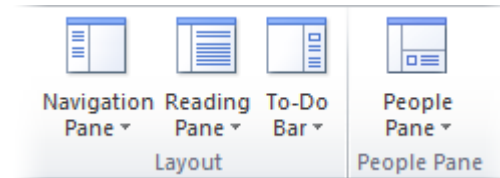
Once you've switched to a ribbon tab in this way, all available KeyTips for that tab appear on the screen. You can then finish the sequence by pressing the final key (or keys) for the command you want to use.

To go back one level while in a sequence, press the ESC key. Doing so multiple times in a row cancels KeyTips mode.

Tip Keyboard shortcuts from Outlook 2003 are still available in Outlook 2010. If you know a shortcut sequence, go ahead and type it. For example, CTRL+C still copies selected information to the Clipboard, and CTRL+R opens a message so that you can reply to it.

Customizing the Outlook program window

Different people may have a different preference about whether they want to see the various parts of the Outlook 2010 interface, such as the Navigation Pane, the Reading Pane, the To-Do Bar, or the People Pane.



To show or hide these optional parts of the interface, click the **Mail** button at the bottom of the Navigation Pane, and then click the **View** tab on the ribbon.

In the **Layout** and **People Pane** groups, click the **Navigation Pane**, **Reading Pane**, **To-Do Bar**, or **People Pane** button, and then set the display options you want.