MICROSOFT OUTLOOK

MICROSOFT OUTLOOK COURSE DESCRIPTION
The key to a success in any business is how well you manage your communications with the various individuals or groups. Microsoft Outlook is THE most popular software for executing and managing emails, contacts, calendars and more. This course will cover a quick overview of all the tools incorporated into Outlook, and then move on to topics chosen specifically for large organizations. Included will be: creating efficient folders to save emails in Outlook; Attaching files to Outlook emails; creating/managing contacts and groups for reference and email use; entering appointments and scheduling meetings into Outlook calendar (including sending invitations); setting appointment reminders; using shared/group calendars in Outlook.

This, and other handouts, are available at: https://www.clearcutcomputing.com/school

Course Contents:

1. Outlook Environment
    a. Normal start screen vs Inbox start screen
    b. Reading Pane
    c. Organize email by creating folders
2. Email
    a. Reading
    b. Reply vs Reply to All
    c. Forward
    d. Email editor
    e. Read Receipts & Delivery Receipts
    f. Scheduling when an email will be sent
    g. Email options
    h. Signature files
    i. Email rules & color coding
3. Calendar
    a. Creating appointments
    b. Recurring appointments
    c. Reminders
4. Contacts (Address Book)
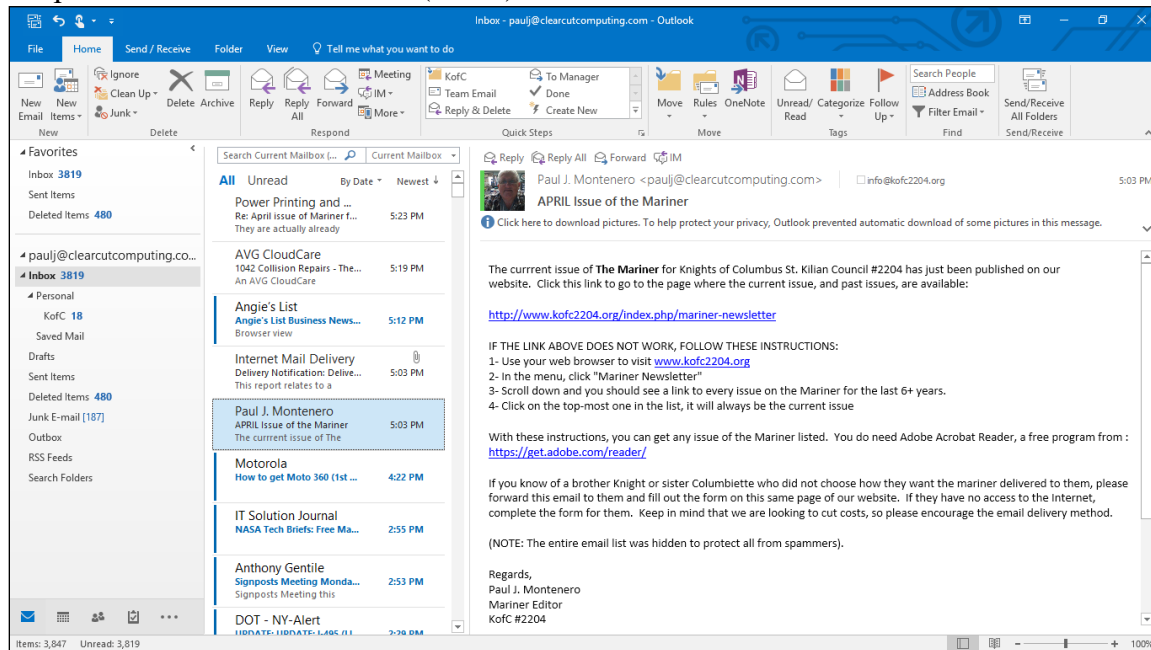   a. Creating contacts
    b. Contact Groups
    c. Others…

Paul J. Montenero
paulj@clearcutcomputing.com

MICROSOFT OUTLOOK

1) Outlook Environment

"Outlook Today" Initial Outlook screen
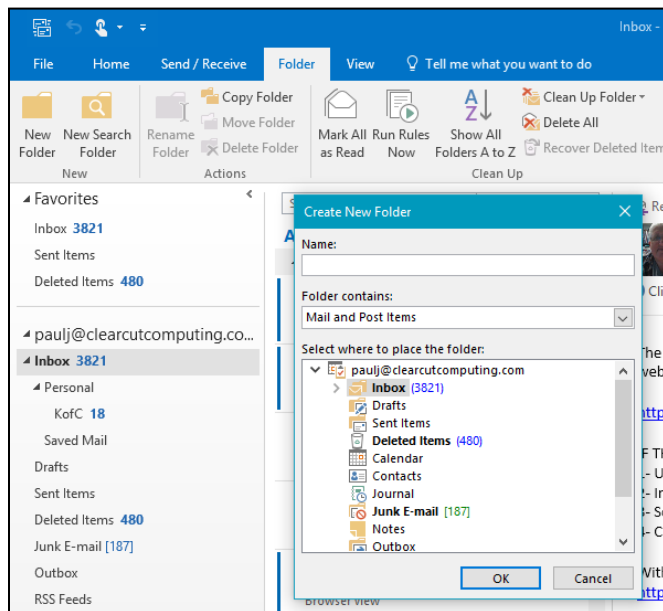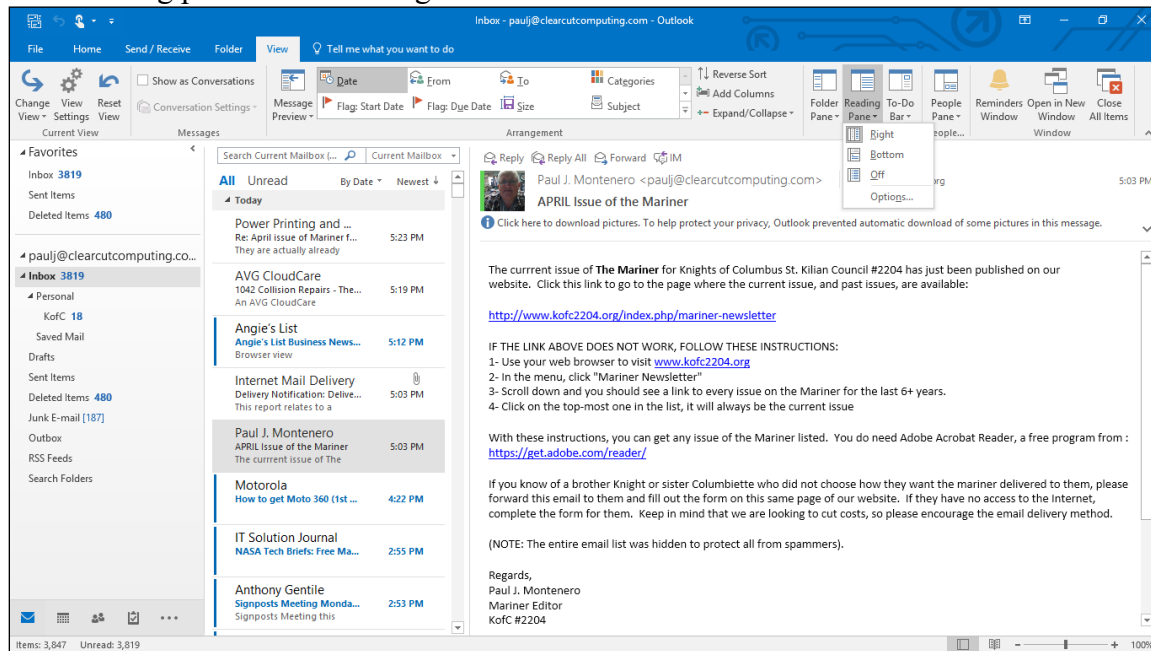(Bypasses Inbox)
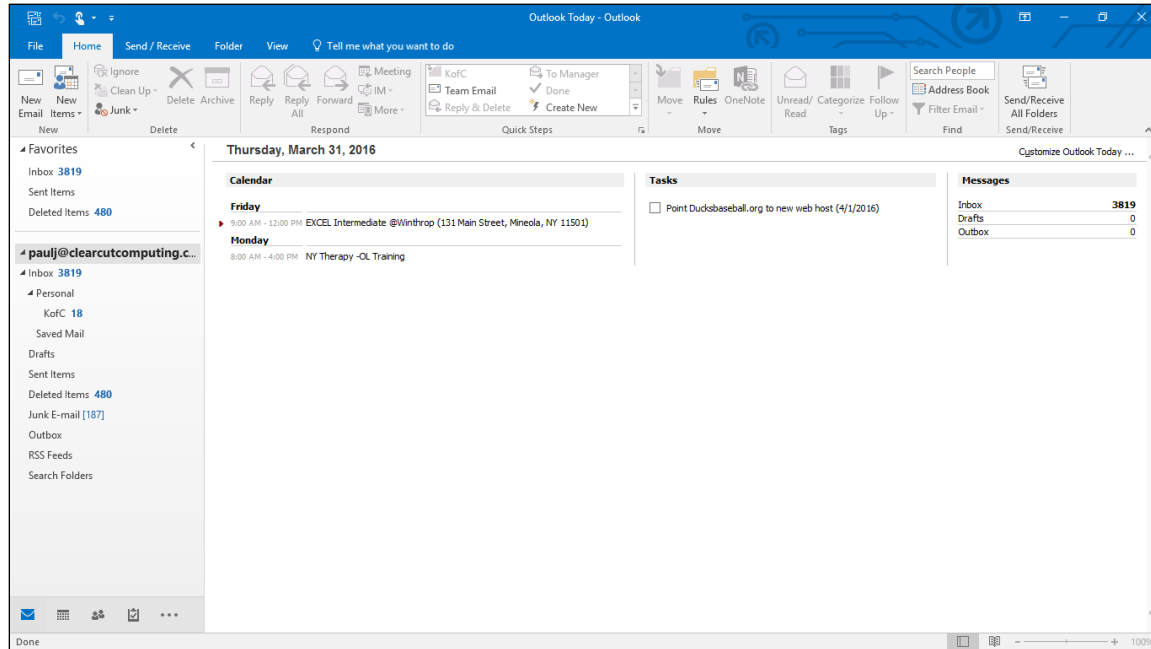
"Popular" Main Outlook screen (Inbox)

MICROSOFT OUTLOOK

The "reading pane" can be changed:

Creating Folders – Organizing Mail

Many people create multiple folders in Outlook to organize the mail they want to keep. For example, a sales person might want a separate folder for every customer they have.

The easiest way to do this is to right-click on the folder, in the tree, where you wish to create a sub-folder, and choose "New Folder." Type the name you want in the box and hit the **Enter key**.

Alternatively, click the Folder tab, and then click **New Folder**. Type in the name you wish to label the folder and make sure you have clicked on the folder you want the new folder to be under (a branch of the tree). Then click **OK**.

To file messages into these folders, you simply drag the messages into the folders or use the Move button on the toolbar (to the right of the print icon).

CREATE·A·NEW·E-MAIL·¶

E-mail·is·designed·to·mimic·a·traditional·written·business·letter.··Let's·look·at·the·mapping· below·of·the·components·of·a·business·letter·to·an·e-mail·composition·screen.¤

Who·the·e-mail·is·from· and·the·date·are· automatically·inserted· into·the·e-mail.¤

From: Paul Montenero
        PO Box 369
        Farmingdale, NY 11735

April 1, 2001

To: Ignatz Schmurtz
        One Education Drive
        Garden City, NY 11530

Subject: E-Mail Class

Dear Ignatz:

The only way to become fluent in the use of e-mail is to do it every day! Try to turn on your e-mail program at the start of each day and send a message or two to friends or a co-worker.
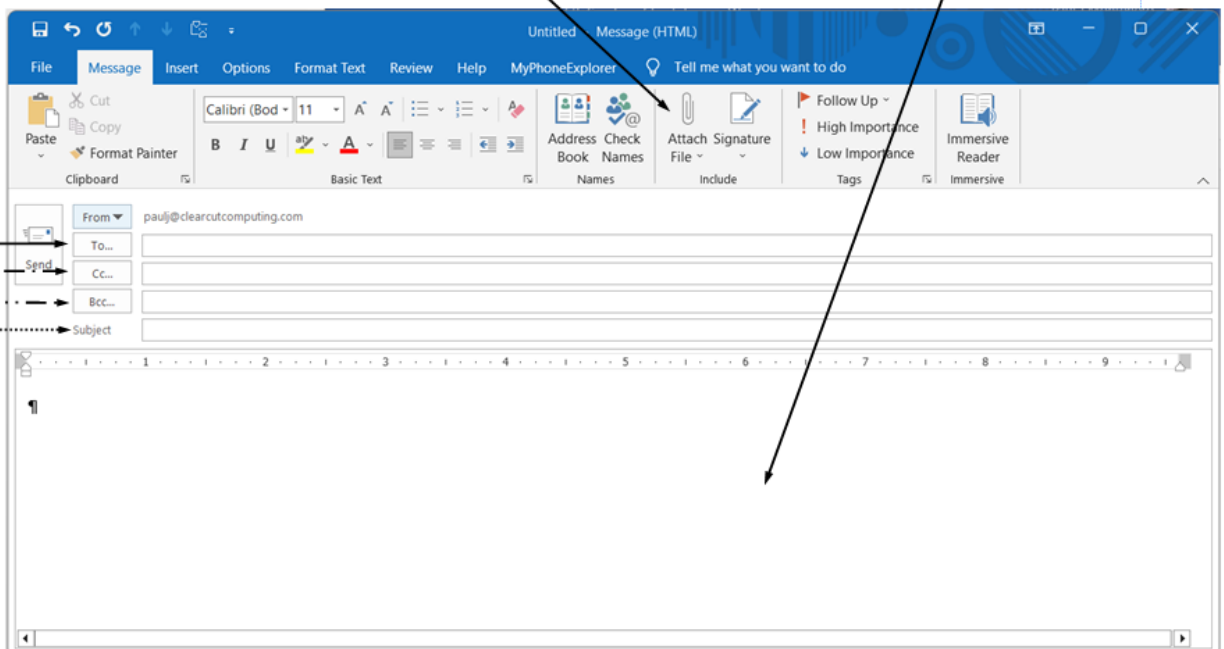
Sincerely,

Paul J. Montenero

ATTACHMENT

CC: Joe Smith
        Sue Jones

BCC: Nassau Community College

MICROSOFT OUTLOOK

2) Email

Writing a New Message (eMail)

To: primary people the message is for.

CC: "carbon copy" –people who should know about the email conversation; everyone who receives the email will see the people on the "TO" list and the "CC" list.

BCC   "blind carbon copy" –people who see the email and everyone in the "TO" and "CC" list; but nobody will see the list of people in the "BCC" list.
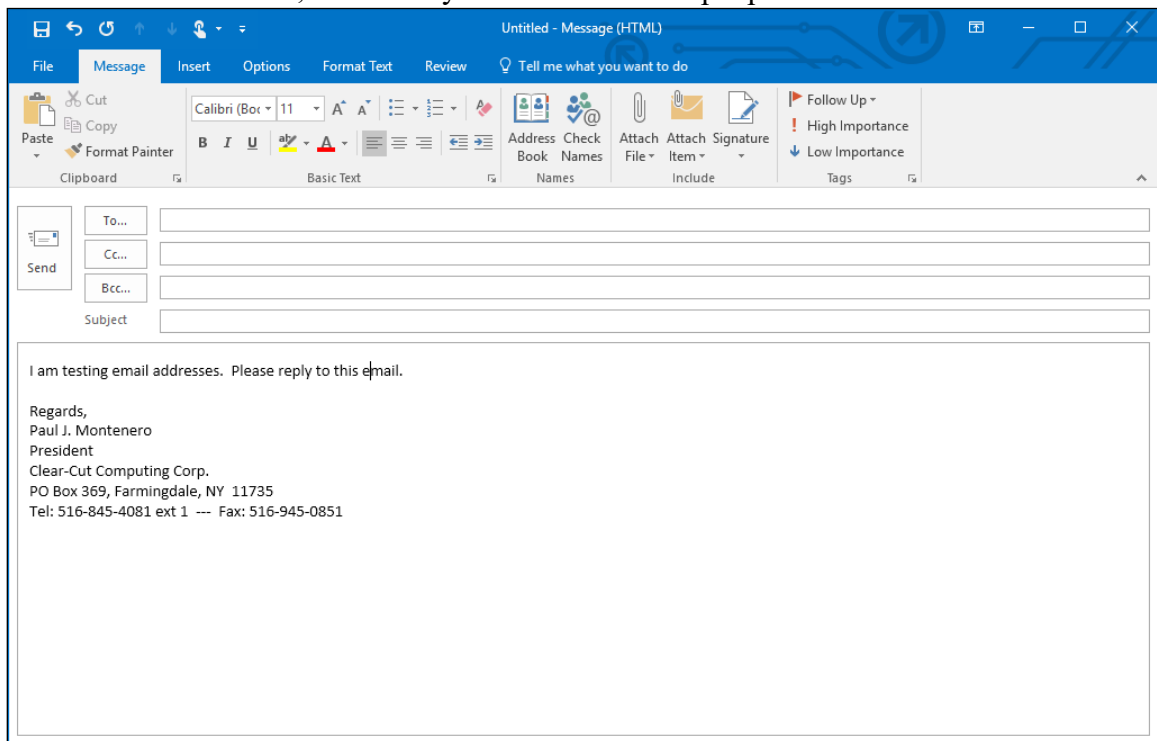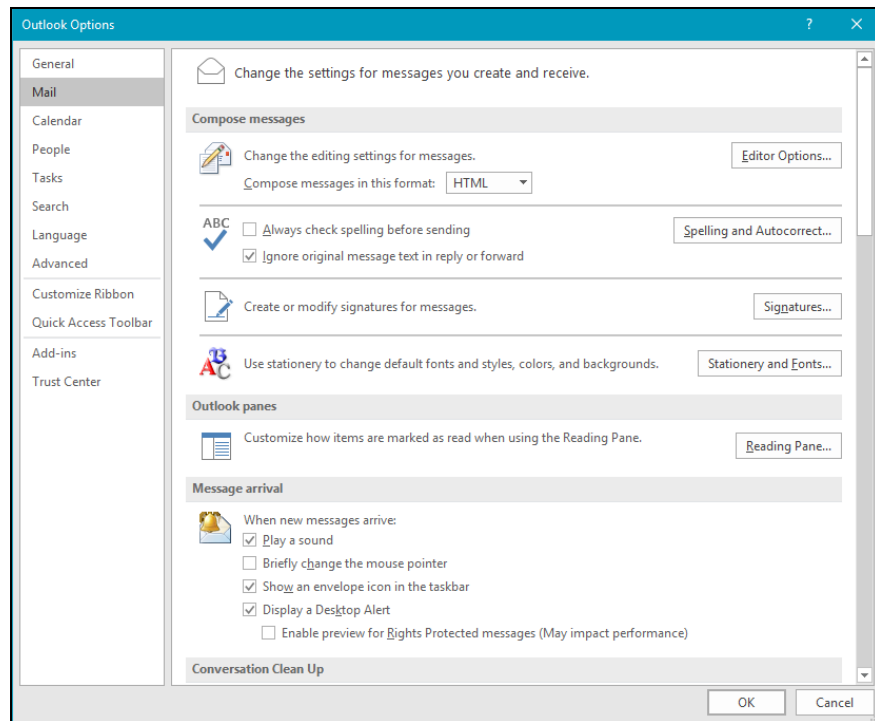
Popular Email Options – on the **Options** tab, are choices for:
- Requesting a "Read Receipt" and "Delivery Receipt."
- "Delaying Delivery" (or scheduling when an email will be sent).
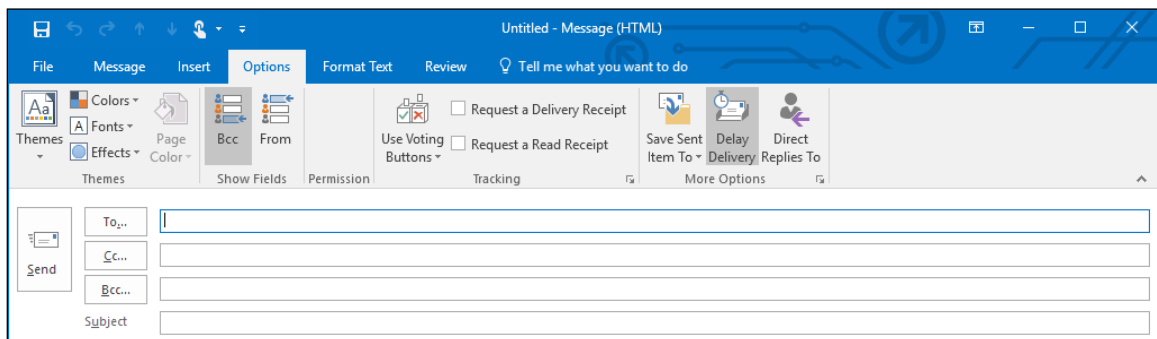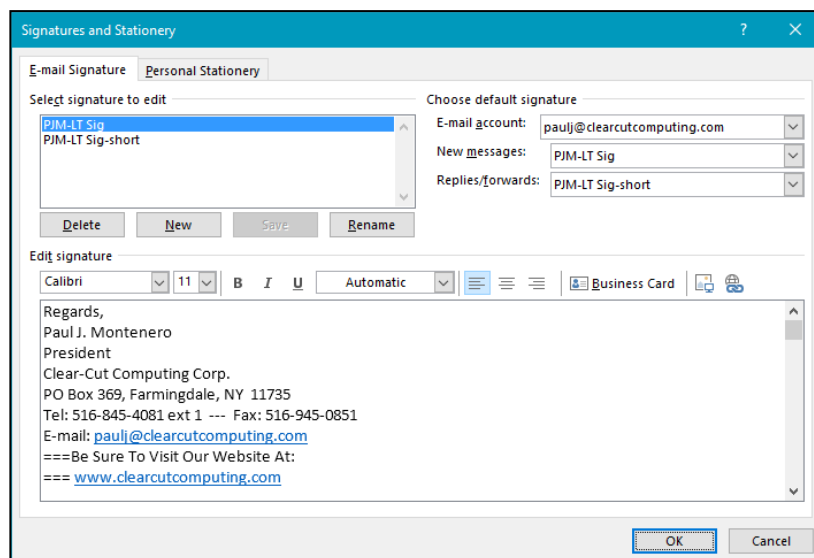
MICROSOFT OUTLOOK

Click the **File** tab and then choose **Options** to get to the many customizable settings you have available to you in Outlook. Clicking **Mail**, on the left brings up the window below.

Authoring your emails in HTML format (changing font colors, sizes, bold) can be done if you set the "email editor" to Microsoft Word (done on the Tools---Options menu choice; then click the Mail Format tab).

Also on this screen are the controls for setting your "Signature." Signatures are text that can appear at the bottom of new mail you write or replies. This saves you time as you can save a lot of info in one signature.
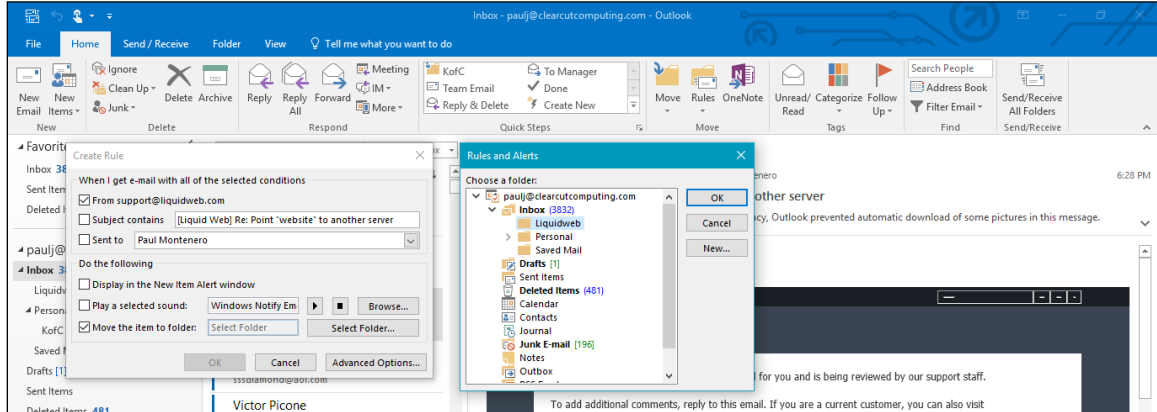
Email Rules

On the **Home** tab, click **Rules**. The two choices at the bottom of that menu are the most important:

- Create Rules – allows simple rules to be created (shown below).
- Manage Rules & Alerts – for more complex rules

"Color-Coding" emails is actually known as "Conditional Formatting:"

1. From the **View** tab, click **View Settings**.
2. In the window that appears, choose **Conditional Formatting**.
3. On the next window, click **Add** and give a name to it.
4. Click the **Font** button and set how you want the messages to be displayed if the condition(s) are met.
5. Click the **Condition** button
6. Fill in the information on the final window. You can be as versatile as setting the condition to trigger if certain words are in the subject or body of the email.
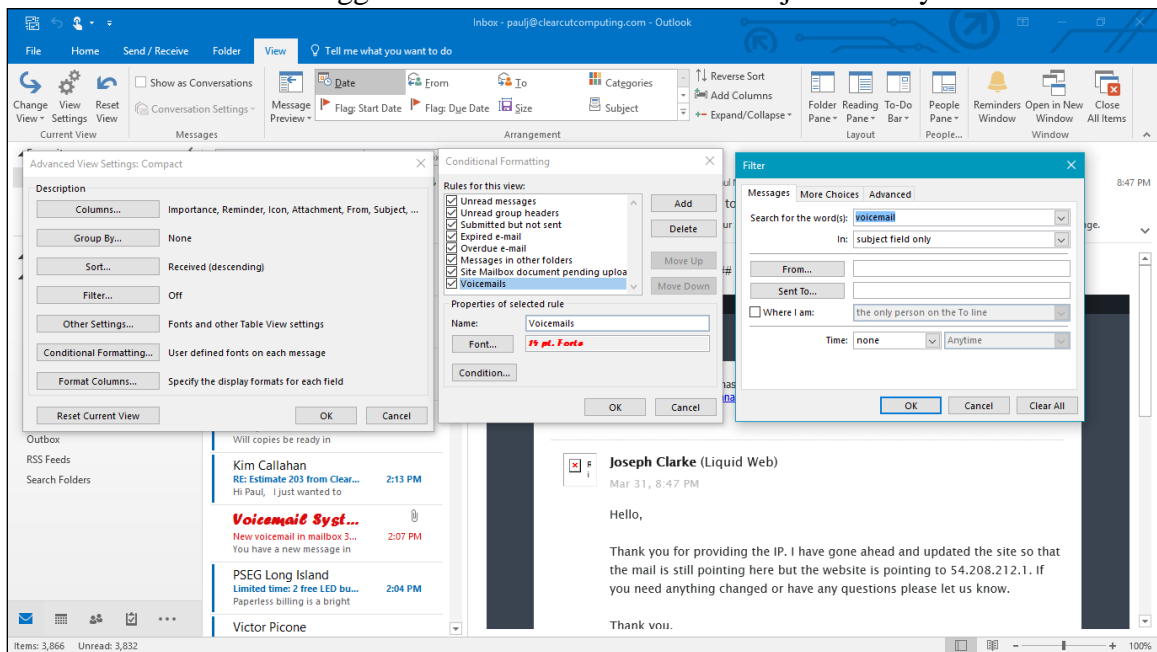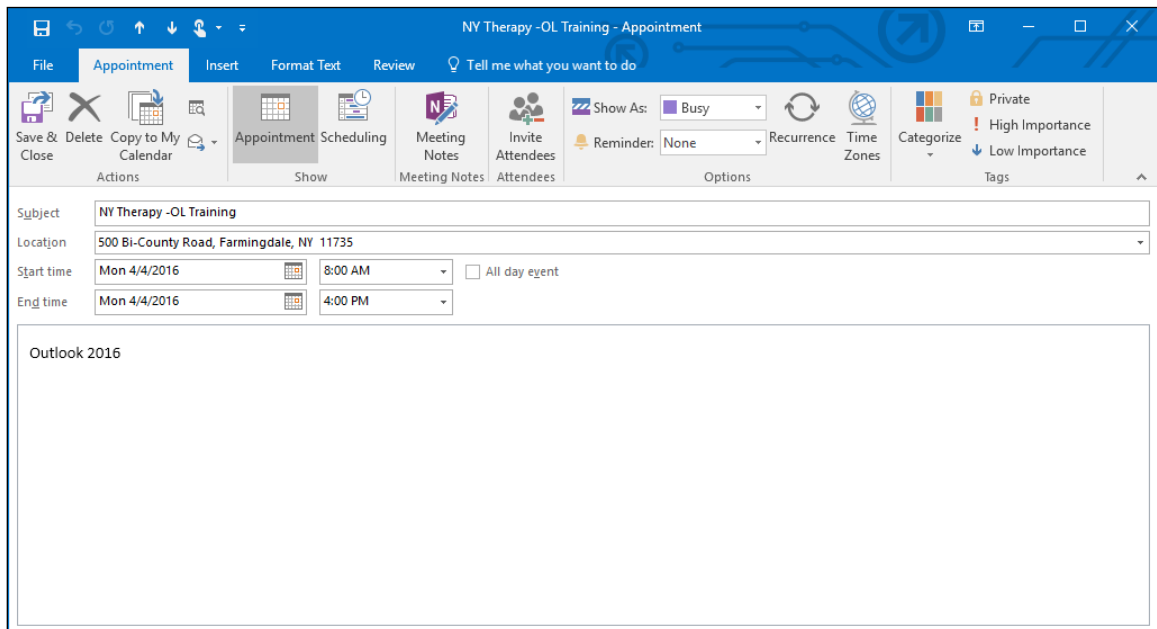
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3) Calendar

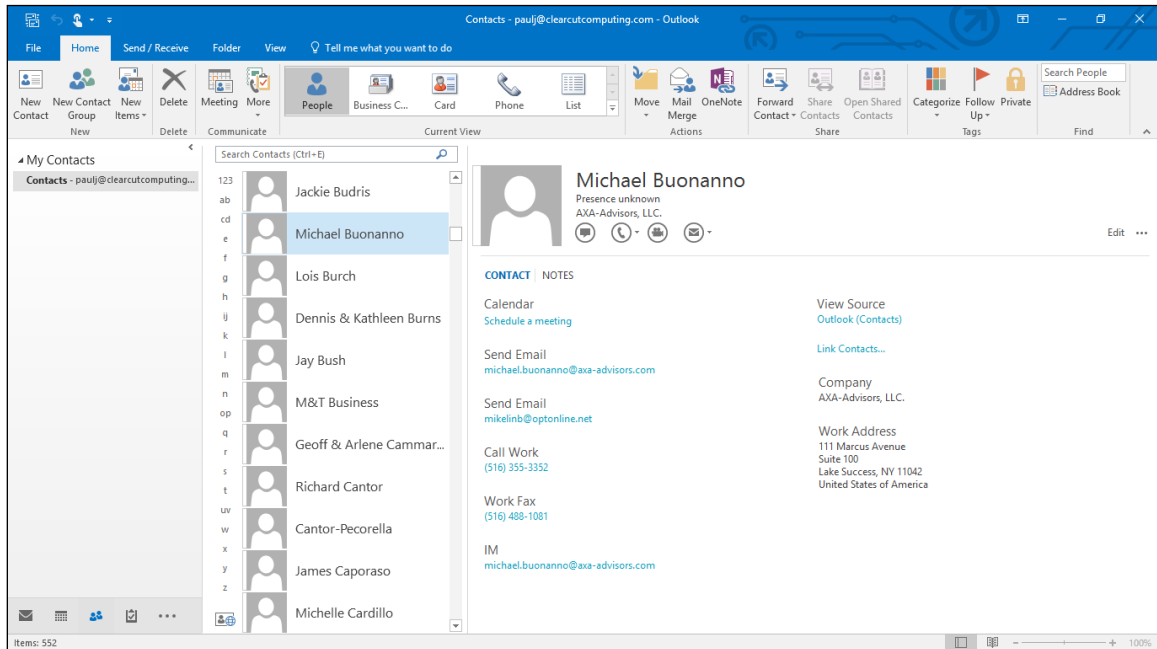From the view menu, you can choose from different views: single day, week, month.
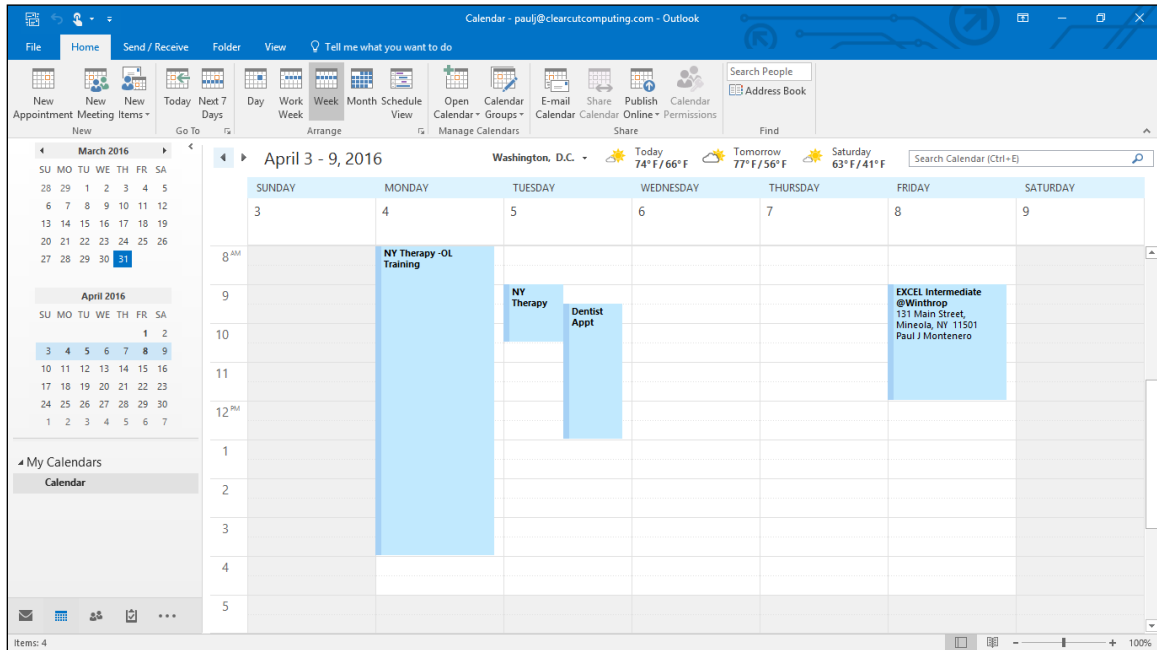
To add a new appointment, either click the new button or double-click on a time slot.
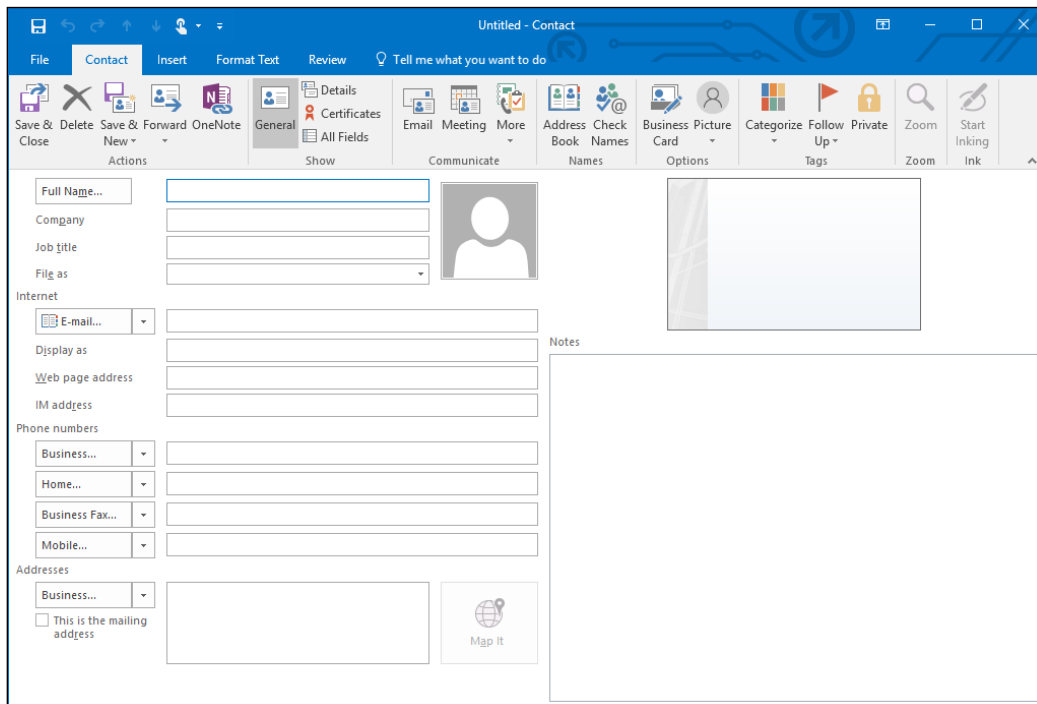
MICROSOFT OUTLOOK

4) Contacts

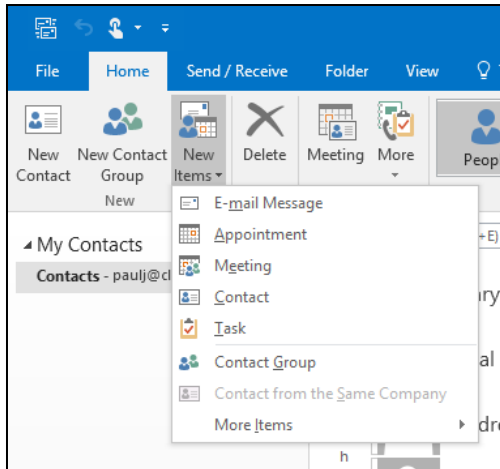The view can be changed to choose from many different layouts.

Entering/Editing a Contact

Simply click the New button and enter the details. Outlook has a wide assortment of fields to use to record the details of contacts you know. Use the bas along the top of the window to see all of the fields

MICROSOFT OUTLOOK

Contact Group (also referred to as "mailing lists" or "mail groups") can be created in Outlook by clicking the arrow to the right of the "New Items" button and choose "Contact Group" from the menu that appears.

To populate the list, you either choose:

- Select Members…   to pick existing contacts already in your address book.
- Add New…   to type in email addresses directly.
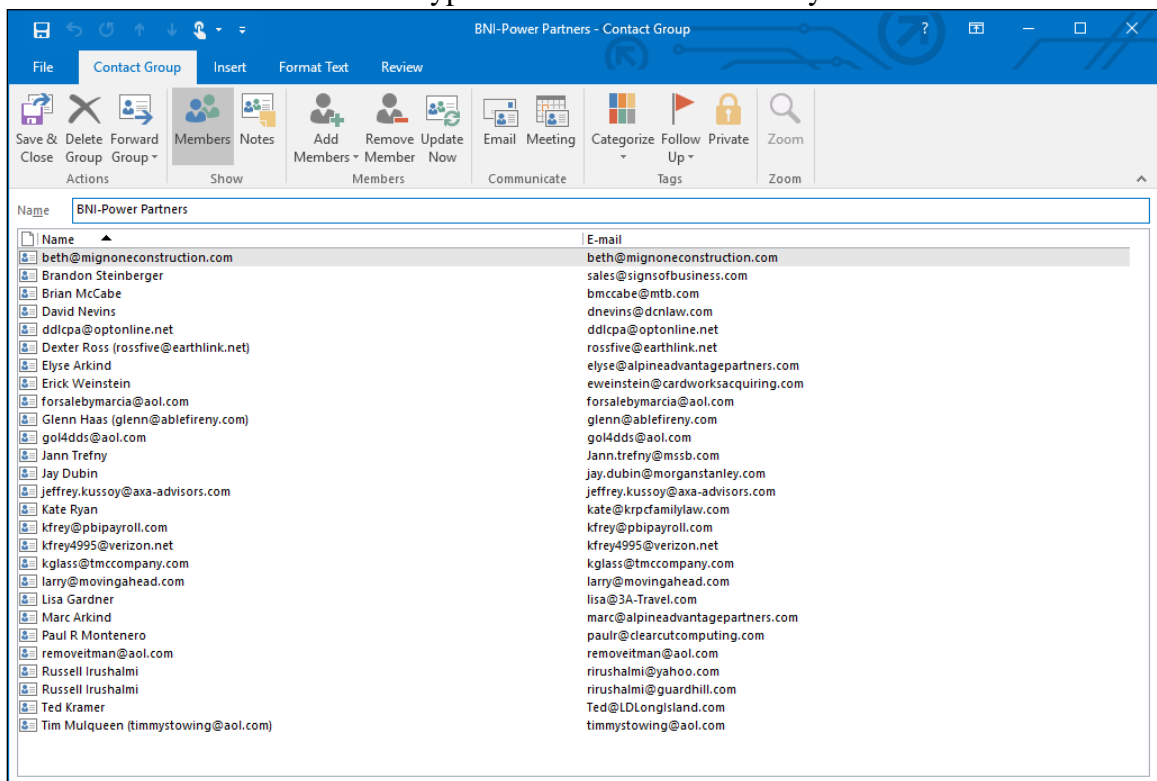
Printing contacts

Outlook provides for many printing options designed to allow those people who like to carry paper address books with them. From the tabs on top of the screen, click **File** and then choose **Print**. Many arrangements of the contacts are available.