

Microsoft Outlook for Beginners



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2.0 hours

This is a basic computer workshop. Microsoft Outlook is an email and calendar program. In this workshop, we will learn the basics of email including creating and responding to emails; and the basics of calendars including creating appointments and calendar management.

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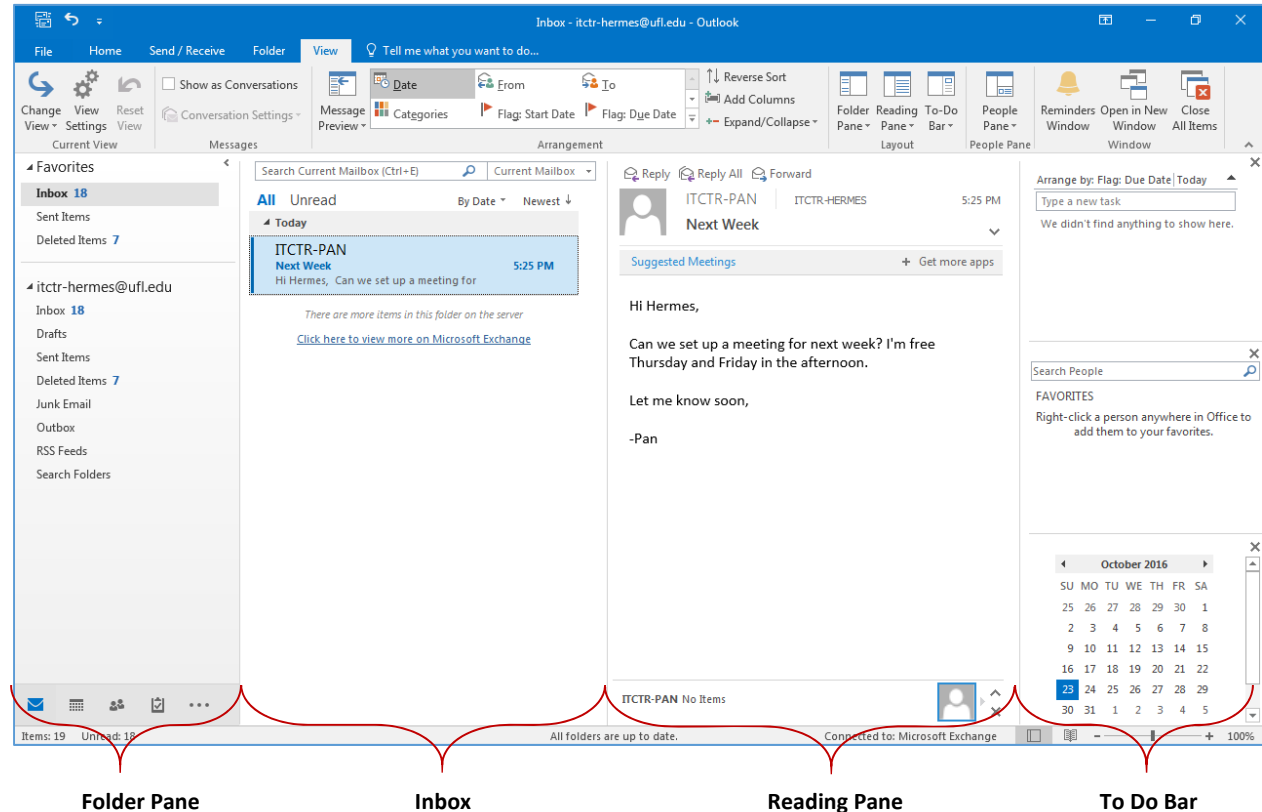
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Outlook

Microsoft Outlook is a powerful organization tool used to manage emails, calendars, tasks, and contacts.

Outlook Interface



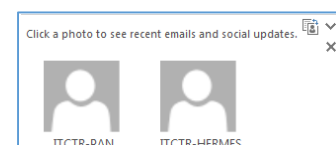
Folder Pane – In this Mail view, the Folder Pane contains a customizable Favorites area for the most needed folders, as well as a list of all the email folders. To add a folder to the Favorites area, right-click and choose **Add to Favorites**. At the bottom of the pane you will find buttons to 'navigate' to the different areas of Outlook, such as the calendar and contacts. This pane can be minimized by clicking the < button in the upper right corner of the pane. This will collapse the left pane into a small column of options. There will be a > button at the top. This will temporarily open the pane. Once it's open you'll need to click on the thumbtack (📌) in the corner of the pane to "pin" it open, or change the Folder Pane options on the View tab to **Normal**.

Inbox – This area displays a list of messages in that folder. Unread messages are bolded.

Reading Pane – The Reading Pane gives you a preview of the selected message. This can be moved to across the bottom or turned off from the View Tab. At the bottom of the Reading Pane is a People Pane. This may show more information about the sender.

To Do Bar – This area shows a calendar of today with a list of upcoming appointments and tasks. This can be turned off from the View Tab. This pane can be collapsed by pushing the > button in the upper left corner of the pane.

People Pane – the People Pane is minimized in the picture above. It's along the bottom of the Reading Pane, and like the Folder Pane, Reading Pane, and To Do bar, you can change the settings on the View tab.

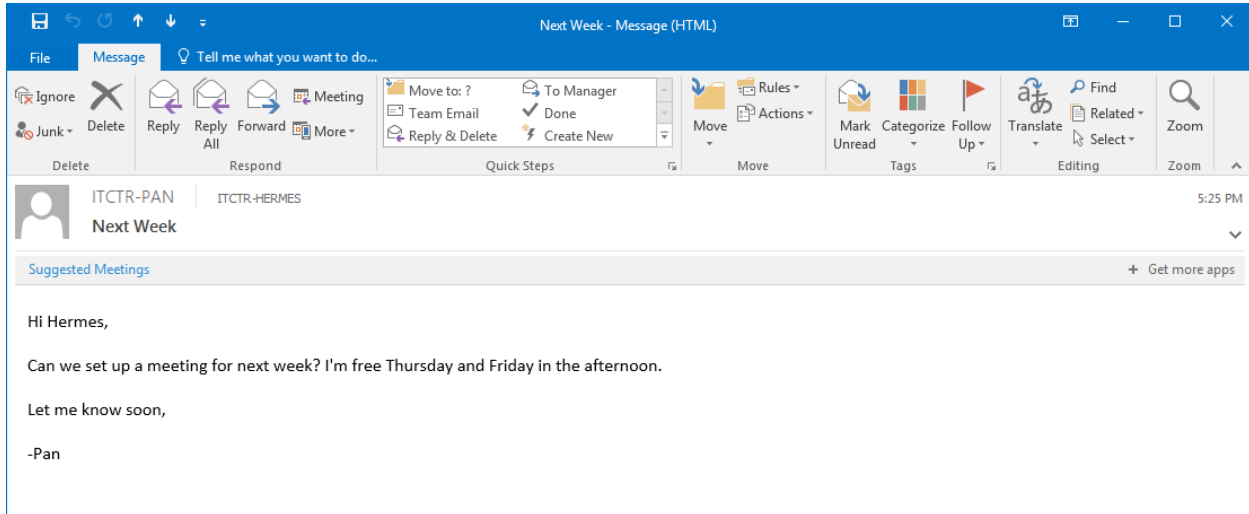


Messages (E-mails)

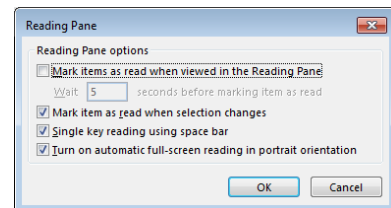
When we open Outlook it will connect with the server and load all of our incoming messages. New messages will appear bolded and a count of the number of unread emails will be displayed in parentheses next to their folder.

Reading Emails

You can view the email in the Reading Pane, or you can double-click on any part of the email in the list and it will open the email message.

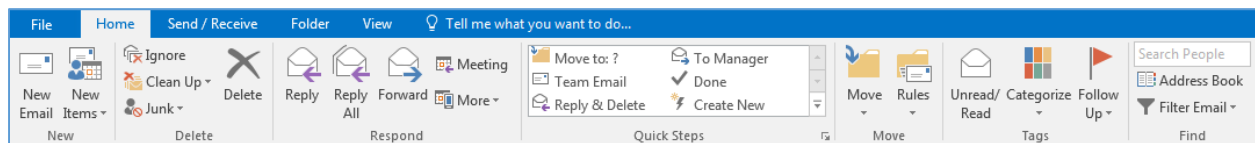


If your Reading Pane is turned on, you will see a preview of the selected email. After a preset time, the previewed email will be marked "READ". If you don't want this to happen you can turn off the Reading Pane from the View tab, or change the options so that it delays the "Mark items as read". These options are found in the reading Pane menu on the View tab.



Create New Email

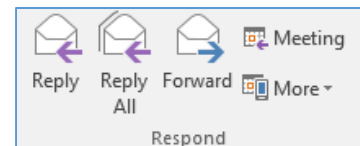
While in the Mail view you can click on the **New Mail** button on the Home Tab.



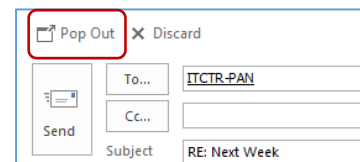
If you are in another view, choose the **New Items** dropdown button and choose **E-mail Message**, or use the keyboard shortcut Ctrl-Shift-M.

Reply or Forward

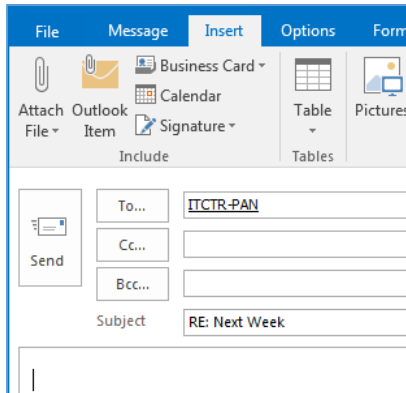
Whether you are in an open message, looking at it in the Reading Pane, or have simply selected it from the list of emails, you can choose Reply (Ctrl-R), Reply All (Shift- Ctrl-R), or Forward (Ctrl-F) from the Respond Group on the Home Tab.



If you reply from inside the reading pane, your message will stay there. If you need it to be in a floating window, click on the **Pop Out** window.



To, CC, BCC



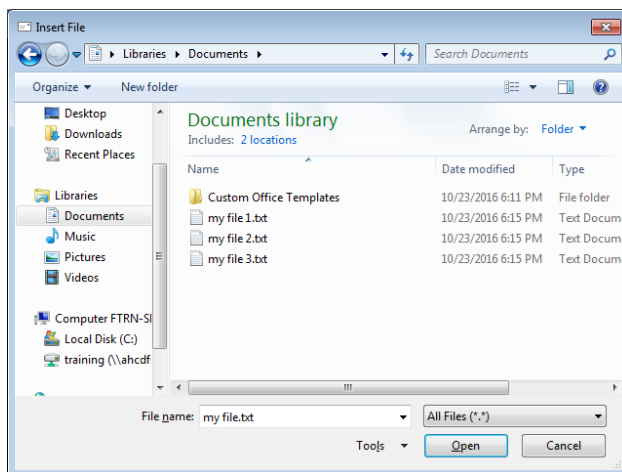
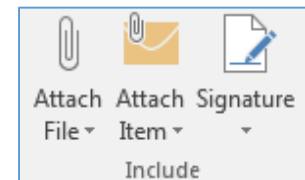
Ribbon – The ribbon is contextual, that is the tabs within the ribbon change depending on what we're doing. Here I'm sending an email so I have email tabs. Specifically, I'm looking at the insert tab so I can include attachments and signatures.

To, CC, and BCC – Anyone included in these three lines will receive the email. We send an email **To** the people who need to read it and who will hopefully respond. We send a courtesy/carbon copy (**CC**) of the email to people we think should be aware of the email but we don't expect a response. And we send a blind copy (**BCC**) to the people we think should see the email, but they will be hidden from all other recipients.

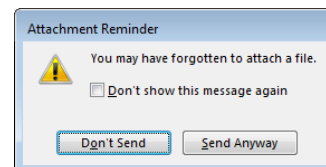
BCC is useful for sending a mass email, so when someone chooses REPLY ALL, it will be sent to the people the original email was from, to, and cc'ed. When we send reminders of our workshops, we send it FROM the training account, TO the training account, CC the instructor, and BCC all the attendees. If someone replies all to let us know they are cancelling, the email only goes to the training account and the instructor. You can turn on the BCC from the Options tab inside an email.

Adding Attachments

To attach a file to an email before it is sent, click on the **Attach File** button in the Include Group on the Home Tab or the Insert Tab. The Insert File window will look a little different depending on your version of windows, but the concept is the same. You can select multiple files from the same folder by using your Shift or Ctrl keys while clicking on the file names.



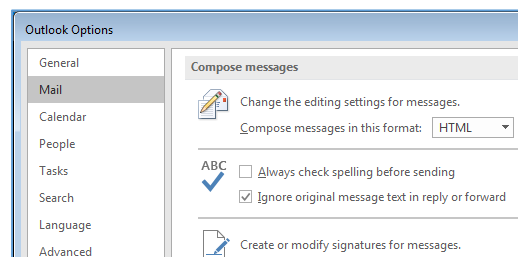
Microsoft Outlook looks at the body of your email for any form of the word attach. If you do not include an attachment, it will give you a warning.



If you check the "don't show" message, it will stop popping up. If you've changed your mind and need the extra warning, you can turn it back on from the File menu, Options, Mail options, Send Messages section.

Automatic Spell Check

The Outlook options Mail page also contains one of my favorite choices, Spell check. I usually turn on the **Always check spelling before sending**. Outlook has a check as you go feature like Microsoft word, but I appreciate the double check that this feature offers.

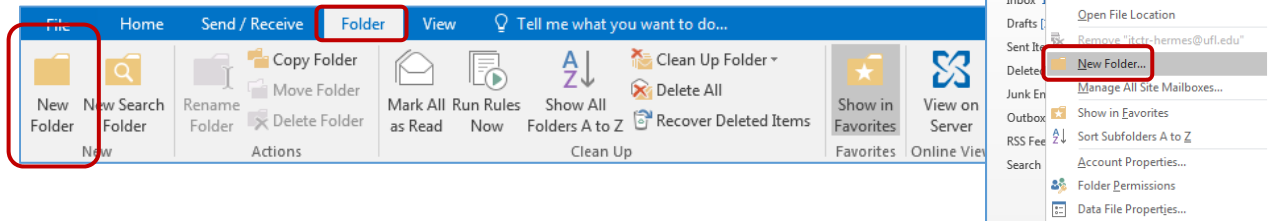


Signatures

A signature can be as simple as your name, and as elaborate as a business card with a confidentiality statement. It represents how you want to "close" your email. You can open the **Signatures** through the Outlook options Mail page, or from the **Include** Group on the Home Tab or the Insert Tab. You can create multiple signatures, and set the defaults of when you want to use each kind (i.e. new emails, replied emails).

Saving/Filing Emails

The folder list in the Folder Pane is a great way to organize your emails. New folders can be created in the Mail view from the Folder Tab, or by right-clicking on a folder in the Folder Pane.



A new folder will be created under the folder you had selected. For example, if you would like to create a *Cabinet* folder in the Inbox, then you should select the Inbox before creating the folder. If you want it to be on the same level as the inbox, choose the username at the top of the list. Folders can be moved after they are created.

A little triangle will appear in front of folders that have subfolders. Clicking on the triangle will expand the list of folders.

To file an email:

- Drag it from the inbox to the destination folder.
- Right-click on an email and choose **Move**
- From the Home Tab, in the Move Group, choose **Move**

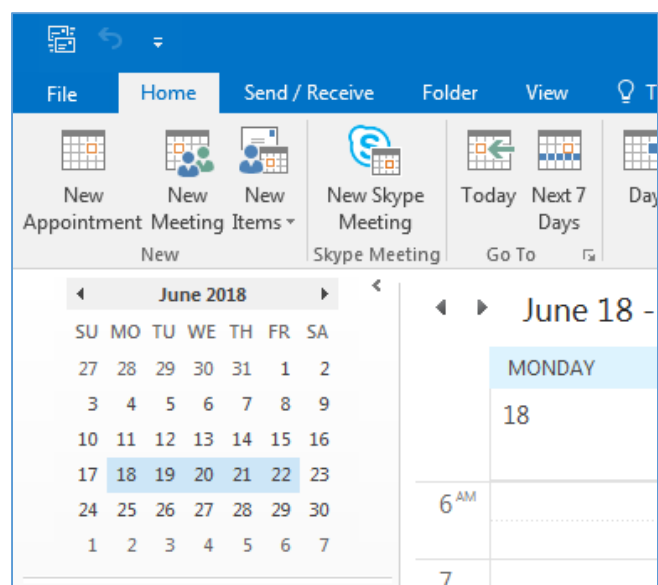
If you put an email in the wrong folder, you can undo the move by clicking the undo button or pressing Ctrl-Z on the keyboard.

Calendars (Appointments)

To view your scheduled appointments, click on the little calendar icon at the bottom of the Folder Pane (Ctrl-2).

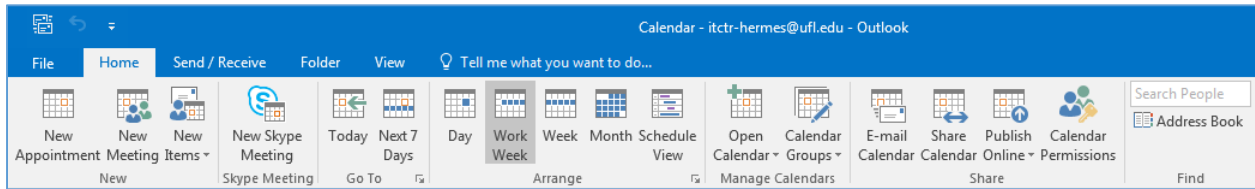
The date navigator (little calendar) on the left highlights "Today" with a darker color. There is a button in the **Go To** group to return to **Today**.

To change to a new day you can click any date in the date navigator, or use the navigation buttons ◀ ▶ along the top of the calendar. If the Folder Pane has room, it may display more than one monthly calendar.

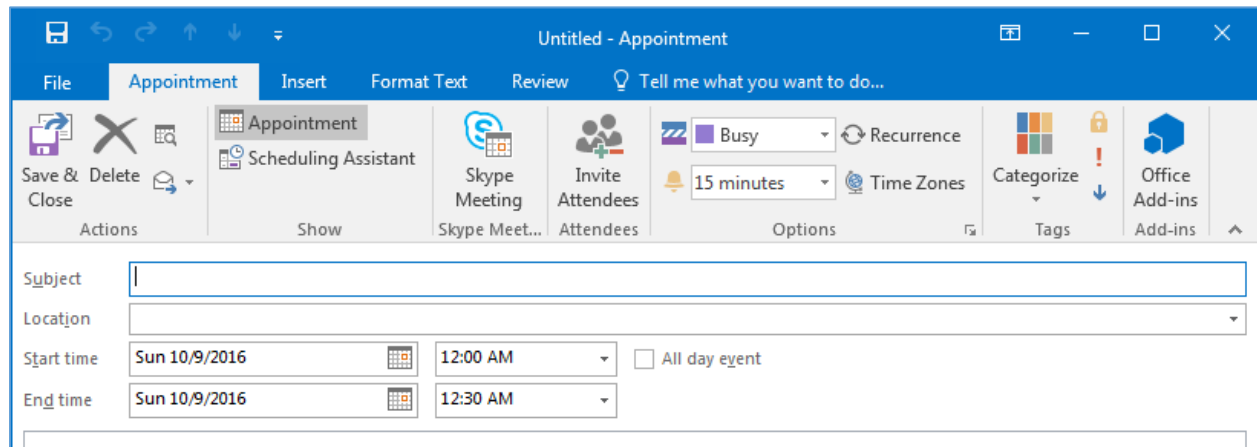


Create Appointments

In the calendar view the first option is **New Appointment**.



If you are in another view, choose the **New Items** dropdown button and choose **Appointment**, or use the keyboard shortcut Ctrl-Shift-A. You can also double-click in the calendar and a new Appointment window will open for that date/time. Once an appointment is created, it will show on your calendar. To edit or view the details double-click on the appointment.



Create Meetings

An appointment becomes a meeting as soon as you "Invite" another person. From the Appointment tab, choose **Invite Attendees**. Appointments will automatically appear on their calendars as soon as you send the 'meeting', and they should receive an email allowing them to accept or reject your invitation. Outlook changes the header to allow for more options, adding a **To...** line for the invitees and a **Rooms...** button to search for available locations. Click **Cancel Invitation** to change the Meeting back into an Appointment.

