

Microsoft Outlook 2019

This class is designed to cover the following basics:

- The address book
- Sending & receiving email
- Conversations
- Creating a signature
- Adding an attachment
- Organizing mail
- Using the Out of Office Assistant
- Using the calendar
- Reminders
- Tasks
- Notes

Introduction

Microsoft Outlook 2019 is used for creating emails, organizing your contracts, creating and managing tasks and maintaining your calendar. When you open Outlook for the first time, there is a wizard which will guide you through the set-up process. You'll need to enter your name, your email address and your password.

The Outlook Ribbon and Toolbars: Like other Microsoft products, Outlook has a Ribbon which runs along the top of the window.

Modules: Outlook is separated into the following modules (or sections): Mail, Calendar, Contacts, Tasks, Notes and Folder List (displays your Outlook folders).

Navigation Pane: On the left-hand side of the screen is the Navigation Pane. You can access different modules by clicking on the module in the lower left-hand corner of the screen.

Inbox: Where all your new email lands.

Reading Pane: The right-hand side of the screen which will display an email after you click on it.

The Address Book

Microsoft Outlook comes preloaded with a few different address books, e.g. Global Address List, Contacts Address Book and Additional Address Books (created by you or a systems administrator). The **Address Book** focuses on email addresses; **Contacts** gives all the information you have about a particular contact.

Adding a new contact: In the **Navigation Pane**, click on **Contacts**. In the ribbon click on **New Contact**. When you are finished filling out as much information as you like about your contact, click on **Save & Close** from the ribbon.

Adding a contact from email: Open or preview the email message that contains the name that you want to add to your **Contact List**. Right-click the name of the person that you want, then click **Add to Contacts**. You can add additional information about your contact and then click on **Save & Close**.

Sending and Reading Email

Creating a new email message: Make sure you are in the Email module by clicking **Mail** in the **Navigation Pane**. Next, click on the **New Email** button in the ribbon. A blank email form will appear.

- In the **To** field, type the email address of the person you'd like to send an email to. Alternatively, you can click on the **To** button and navigate to a contact in your **Address Book**. Double-click on the names of the contact you want to receive your email. Multiple recipients can be separated by a semicolon.
- The **CC** field. "CC" is short for Carbon Copy. This feature allows you to send a copy of the email to additional people. This is a way to keep others informed, but doesn't infer that those being CC'd need to respond or take action.
- The **BCC** field is for a Blind Carbon Copy. To access this option, click on **To** or **CC**. At the bottom of the dialog box which opens, there is an option to include a BCC. Any address in this field will not be seen by recipients in the To or the CC field.
- **Subject** field: Enter the subject of your email here
- Body of your email: Click in the space below the **Subject** field or use the Tab key after entering text in the **Subject** field. Your cursor will land in the space where you construct the text of your email.
- When you are finished composing your email, click on the **Send** button.

Reading email messages: Email messages can be read in the Reading Pane (also called the Preview Pane) on the right-hand side of the screen. By clicking one time on the email message in the Navigation Pane, the email will be displayed in the Reading Pane. Email messages can also be read by double-clicking on a message. This will open the message in another window.

Reply, Reply All, and Forward: After receiving a message, you can:

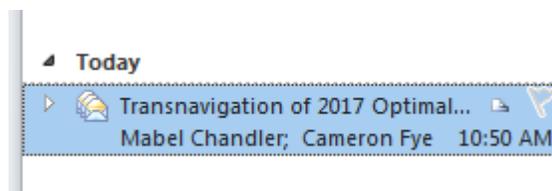
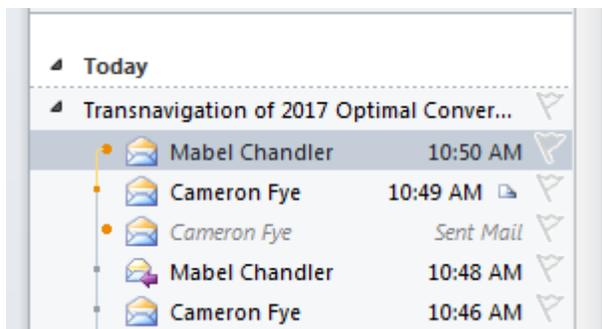
- **Reply** to it (one email will be sent to only the person who sent you the email)
- **Reply All** (emails will be sent to everyone in the To field and the CC field.)
- **Forward** (you can enter the email address of one or more people whom you'd like to receive a copy of the email).

You can access these options from the ribbon (if you are reading the email in the Reading Pane), or the Quick Access toolbar (if you've opened the message in another window).

Conversations

By default, your Inbox will list all the emails you receive in chronological order. Often times you'll have multiple emails which belong to the same conversation (e.g. You send your coworker an email, she replies to it, your reply to her reply, etc.). You can group these conversations together so that, instead of listing them separately in chronological order, they will be grouped together and listed (as a group) in chronological order according to the last email you receive. To view your emails by conversations, click on the View tab, and put a check mark next to the "Show as Conversations" box. A dialog box will appear asking if you want to arrange messages by conversation in the folder you are currently in, or in all folders. Select your preference.

When your emails are grouped as conversations, a white triangle will appear to the left of an email message →



← Clicking on the white triangle again will open the conversation completely, so that you can also see the message you sent during this conversation.

Creating a Signature

A signature is a group of text (it usually contains your name, title and contact information) which can automatically be inserted into the end of an email. To create a signature, Click on the **File** tab and click **Options** from the Navigation Pane. Click on **Mail**. Next to the text **Create or modify signatures for message** click on **Signatures** button.

In the **Select signature to edit** section, click on **New**. Enter a name for the signature and click on **OK**. Select the email account you'd like to New Messages and whether you want to use it for Replies/Forwards. Click on the empty space in the **Edit signature** section and type the text you'd like to use for your signature. When you are finished, click on **OK**.

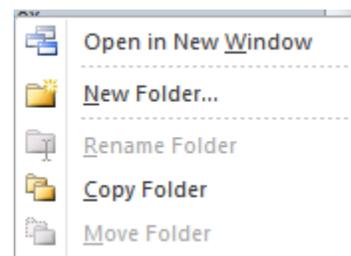
Adding an Attachment

An email attachment is a file (.doc, .jpg, .pdf, etc.) that is attached to the email and sent along with it. When the recipient receives the email, they will see the email and also an attachment (which is usually represented by an icon in the shape of a paperclip) they can click on to open the file. Multiple files can be attached to an email.

To add an attachment to an email, first create the email. On the **Message** tab, click on **Attach File**. An interface similar to Window Explorer will open and you can navigate to the file you'd like to attach. When you locate the file you'd like to attach, either double-click on it, or highlight it and click on the **Insert** button in the lower right-hand corner.

Organizing Mail

One way to organize your email is to create folders, similar to the way you organize files on your computer. You can create a folder to save all of your emails about, for example, the 2020 Tea Cup Convention, or all the emails you received from your boss. To create a mail folder, make sure you are in the mail module. In the Navigation Pane on the left-hand side, left-click on **Inbox** to highlight it, then right-click to get a drop-down menu which will allow you, among other things, to create a **New Folder**.



Left-click on **New Folder**. Enter a name for your new folder and click **OK**. You can move messages into the folder clicking on the email you want to move and then dragging and dropping the message into the folder.

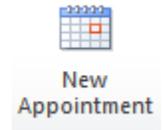
Using the Out of Office Assistant

When you are on vacation, or otherwise out of the office and not able to check email, you can set the **Out of Office Assistant** to automatically reply to emails you receive. The **Out of Office Assistant** will send an automated response which can consist of details for how long you will be out of the office and contact information in case a person should need immediate assistance.

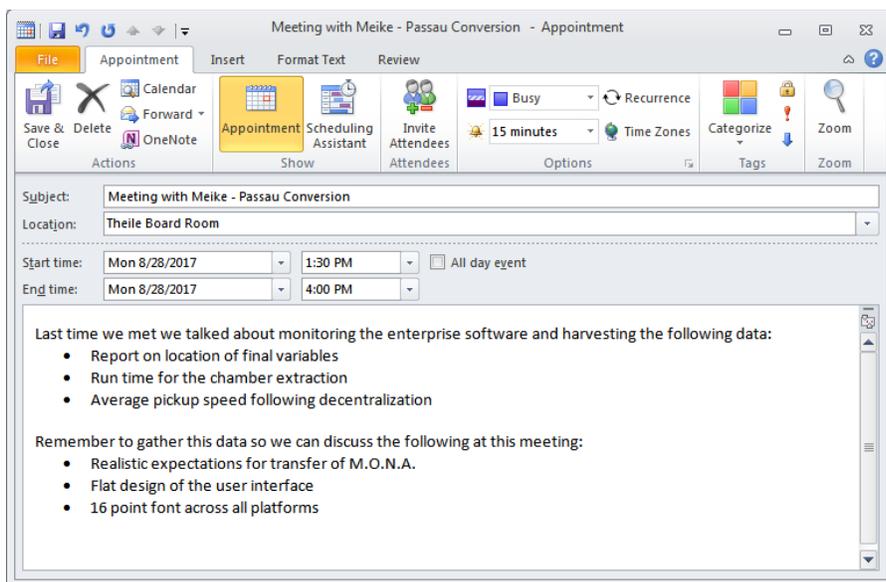
The **Out of Office Assistant** can be found under the **File** tab. Click on the icon **Automatic Replies**. You can select a time range for when to send out automatic replies. In addition, you can create a reply which will be mailed to people outside your organization, and also a reply with different information which can be sent out to people inside your organization. After you have set your parameters and entered your text, click on **OK**.

Using the Calendar

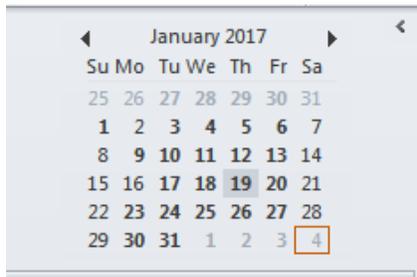
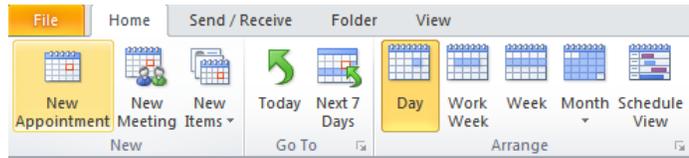
Create appointments and events: You can add an appointment or event to your calendar by first making sure you are in the Calendar module (click on the Calendar button in the Navigation Pane) and then clicking on the Home tab. Click the New Appointment icon.



A dialog box will open and you can fill out the **Subject** of the appointment, **Location**, **Start time** and **End time**. If the appointment goes all day, you can put a check mark next to the **All-day event** box and Outlook will block out the entire day for your appointment. To invite other people to your meeting or event, click on the **Invited Attendees** icon and enter their email address/s. When you are finished, click **Save & Close**.



You can view your schedule by **Day**, **Work Week**, **Week** or **Month** using the following buttons on the **Home** tab in the Calendar module →

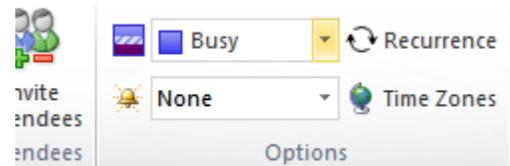


← To navigate to a specific date, click on that date on the small calendar at the top of the Navigation Pane on the left-hand side

Reminders

You can use Outlook to remind you about meetings, appointments, emails you need to take action on. You can ask Outlook to send you a reminder about an appointment or meeting. You can tell Outlook when you would like to be reminded (e.g. 5 minutes before the meeting, 5 hours before, 2 days before, etc.) You can set a default reminder for all meetings and appointments of, for example, 15 minutes. To do this, click on the **File** tab, on the left-hand side in the Navigation Pane click on options, click on **Calendar**, and, under **Calendar Options**, choose 15 minutes in the **Default reminders** drop down. When you are finished, click on **OK**.

When you create an appointment or meeting, you can choose a different time as a reminder, anywhere up to 2 weeks prior to an appointment or meeting. When you set up an appointment or meeting, click on the drop-down menu to the right of the bell icon. Click on the time you'd like your reminder to be sent. When you are finished, click on Save & Close. If you do not want a reminder, click on **None**.



Reminders can be set for emails, contacts and tasks. To do this, click on either the email, contact or task you'd like to remind yourself about. On the **Home** ribbon in the **Tag** subsection click on the **Follow Up** icon.

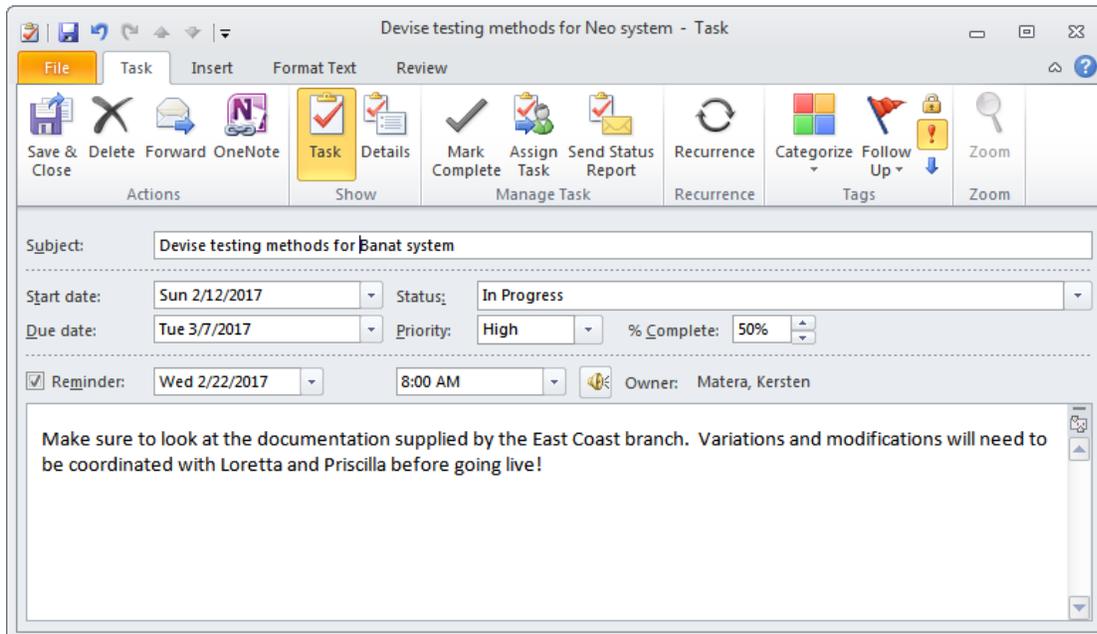


Tasks

Tasks can be used to keep track of your goals and benchmarks. They function in the same way a To-Do List does. To create a task, make sure you are in the Tasks module by clicking on the small Tasks icon in the bottom of the Navigation Pane. On the Home tab, click on New Task.



Add the Subject, Start date, Due date, Reminder, and any other information that's important to you. Click on Save & Close when you are finished.



The task will now appear in your Task list.

Notes

Notes are similar to Post-It Notes. To create a Note, make sure you are in the Notes module by clicking on the small Notes icon in the bottom of the Navigation Pane. On the Home tab, click on New Note. A blank Note will appear into which you can type whatever message you'd like to pseudo Post-It.



When you are finished adding text, click on the "X" in the upper right-hand corner of the Note. It will close and you'll find it on the right-hand side of your screen as a small preview tile with the first few words of text underneath it. You can move these preview tiles around by dragging and dropping. You can double-click to open a Note. When a Note is open, you can also move it around the screen by dragging and dropping. To delete a Note, click on it one time and click on the **Delete** icon on the **Home** Ribbon.