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Microsoft Outlook 2010

Outlook Email & Calendar

Training Manual

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Microsoft Outlook 2010

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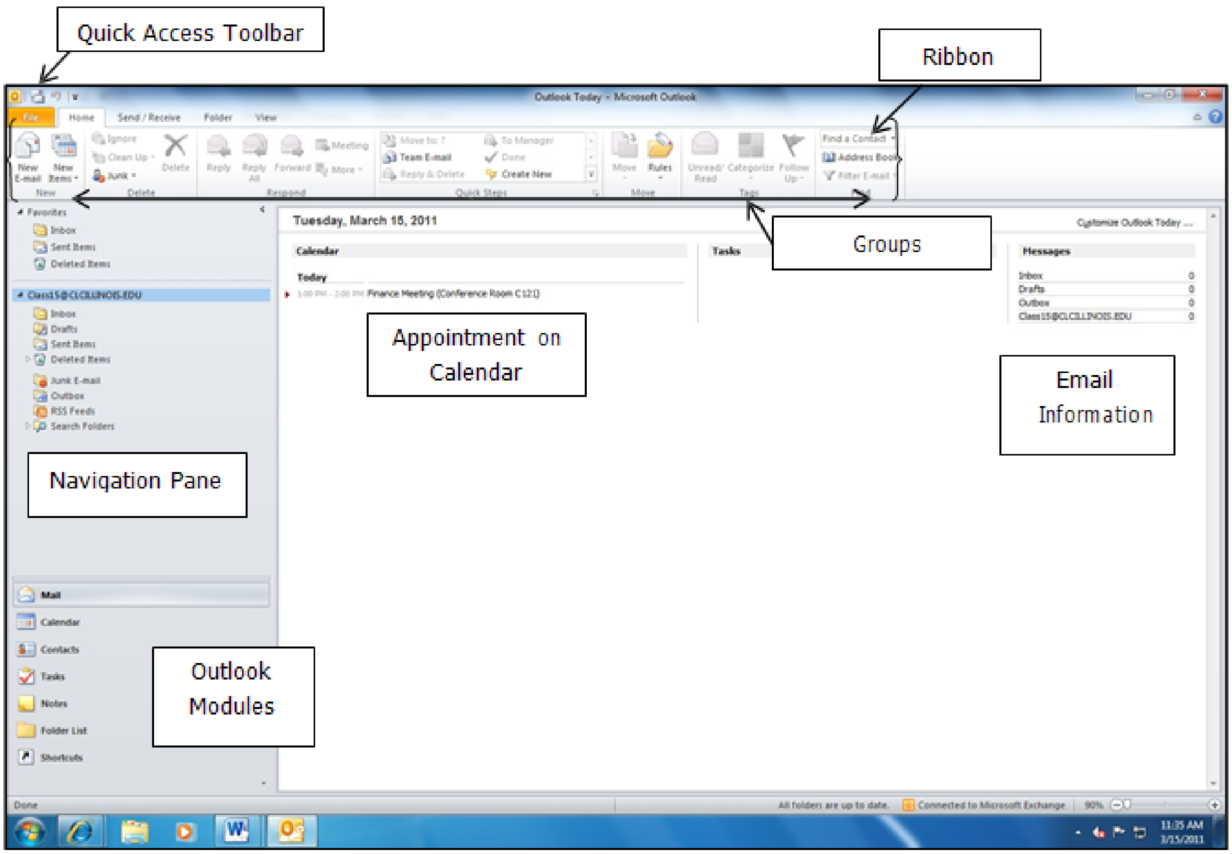
Outlook Today & Outlook Window

Outlook Today – a single page that displays upcoming appointments, meetings, events, tasks, and the number of unread messages. Although this window does not display by default, many users still like to view Outlook Today as the first window in order to give them a quick glance of Today's schedule.

Below is the Outlook Today window. Take a brief look at the various components. In Outlook 2010, the Ribbon has replaced the former menus in the main Outlook window.



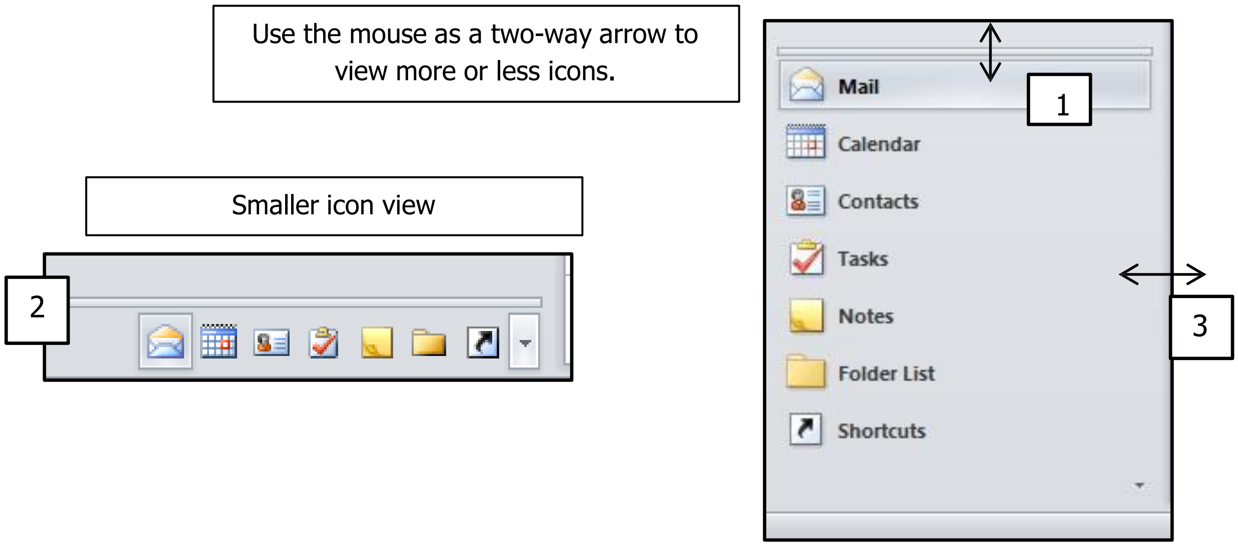
Navigation Pane

The Navigation Pane provides quick access to Outlook's modules and folders. The buttons will appear as both small buttons or larger buttons with text description depending on how the view is set.

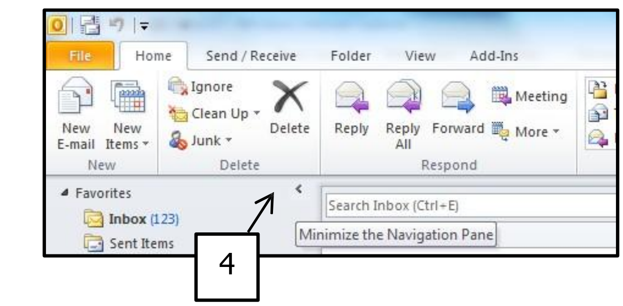
Changing the View of the Navigation Pane

1. Move the mouse to the line above the Mail button and position the mouse to a **two-way arrow**.
2. Drag **upward** to expand the view or **downward** to contract the view.

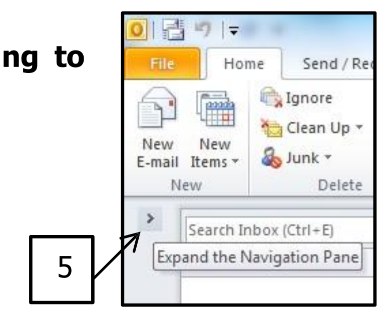
3. Move the mouse to a **two-way arrow** on the edge of the Navigation Pane to make it wider or narrower.



4. To minimize the Navigation Pane, click the **arrow pointing to Left** in the Navigation Pane.



5. To maximize the Navigation Pane, click the **arrow pointing to Right** in the Navigation Pane.



Sending Email

This section covers the various options available when working with email. The lessons will include attachments, setting message importance, setting up custom signatures, recalling email, tracking emails, follow-up flags, and more.

Creating a New Email

The required fields for any email message are: To, Subject, and the body of text. Other information that can be included are Cc (Carbon copy), Bcc (Blind carbon copy), and Attachments.

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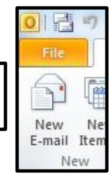
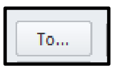
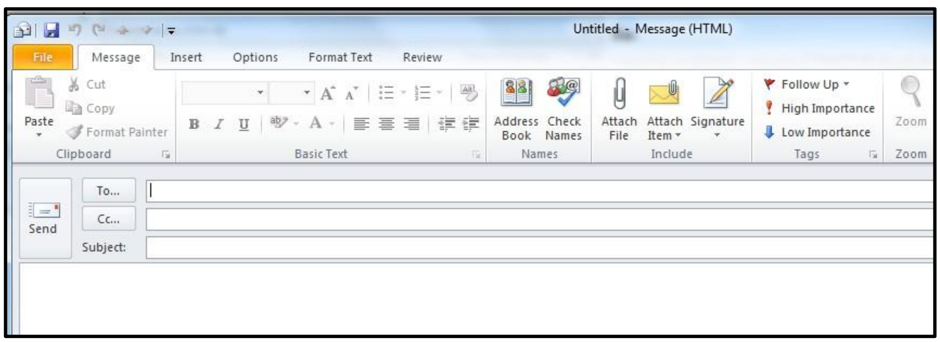
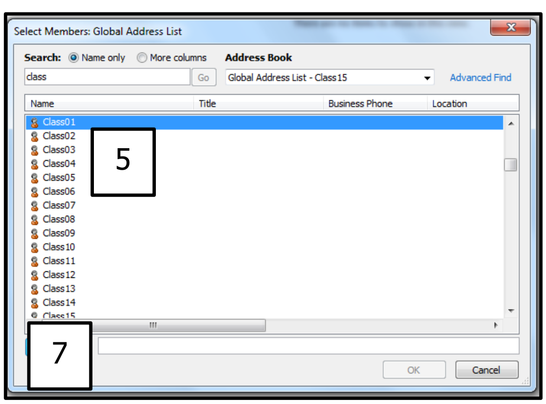


1. Click on the **Mail** button in the Navigation pane.
2. From the **New group**, click the **New Email** button.
3. The Untitled Mail Message dialog box opens.
4. Click the To  button.



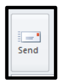
5. In the Search box, type **Class** and watch as the Class names display.



6. Click the email address of your class partner.
7. Click the **To** button.
8. Click **OK**.

9. Click in the Subject box type: **Office Supply Order**
10. Click in the **Message** area or press the Tab key - do not worry about any spelling errors because Spellcheck will automatically run when you click the send button. Type the follow message:

I will order office supplies next Friday. Please place your order as soon as possible. Thank you, Your Name

11. Click the **Send**  button.

Sending an Email with an Attachment

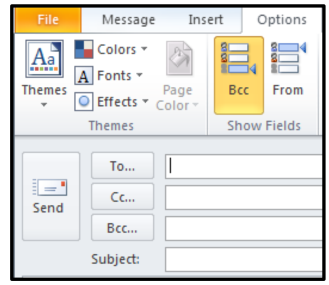
Many times you will need to send an attachment [a file] along with an email. You will send an Expense Report as an email attachment.

1. Click on the **Mail** button in the Navigation pane.
2. From the **New group**, click the **New Email** button.
3. Click in the **To** area and begin to type in your partner's email address. Press Enter to select it.
4. In the Subject area type: **Expense Report**
5. Click in the Message box and type: **Here is a copy of the Expense Report**.
6. From the **Include group**, click on the **Paperclip** button.

7. Click on the **down arrow** to the right of the **Look in:** area and select the **N:\drive**.
8. Double-click on the **Outlook Email folder**.
9. Select the **Expense Report file** that matches your class user **ID #**.
10. Click on the **Insert** button in the lower right corner of the dialog box  or double-click on the file.

11. Click **Send**.
12. When the email arrives **Open** the new email by double-clicking on it.
13. **Open** the attachment by double-clicking on it.
14. Click **Open**. You will see the Opening Mail dialog box.
15. Click **Open** to display the contents of the attachment.
16. **Close** the attachment.

Using BCC When Sending a Message

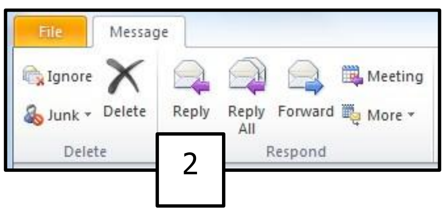


NOTE: The Cc address box is always visible. However if you need to Bcc a recipient, the Bcc address box may be added by going to the Options Tab of the Ribbon while in a new message. Click on the button to add Bcc. Click on it again to delete the field.

Reply to a Received Email

Received emails are usually read. They are answered by sending a reply or forwarded to another person.

1. Double-click on the **Office Supply Order email**.
2. From the **Respond group**, click on the **Reply button**. The message screen opens.



3. The original message will be displayed in the message area. Type the following message in the message area.

Thank you for reminding me. I will check my supply cabinet and get back to you soon! Your Name

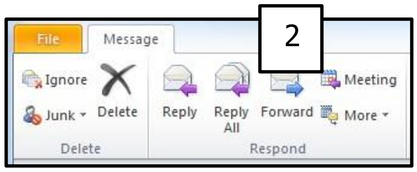
4. Click the **Send** button.

Note: The date & time the reply was sent is now on the top of the message.

Forward an Email

Sometimes an email needs to be forwarded to another person.

1. Open the **Expense Report Message**.
2. From the **Respond group**, click on the **Forward** button.



3. In the **To** box, type your partner's address and click on it.
4. In the Message area type the following: **Here is a file you might need**.
5. Click **Send** and **Close** the window.

Note: The date & time this was forwarded is now on the top of the message.

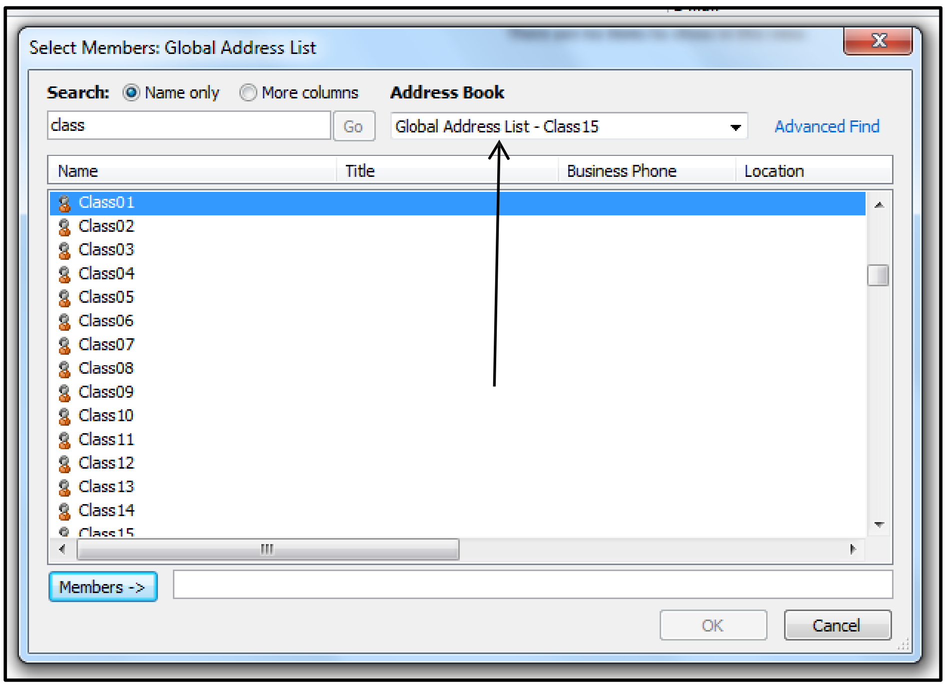
Address Book

Outlook includes three address books for storing address and other contact information in the Outlook Address Book. Current address books include:

Global Address Book – All current College of Lake County contacts are stored here.

Contacts List – New contacts and distribution lists are stored here.

Personal Address Book – Used for personal address and distribution lists, rather than storing them with work related contacts.

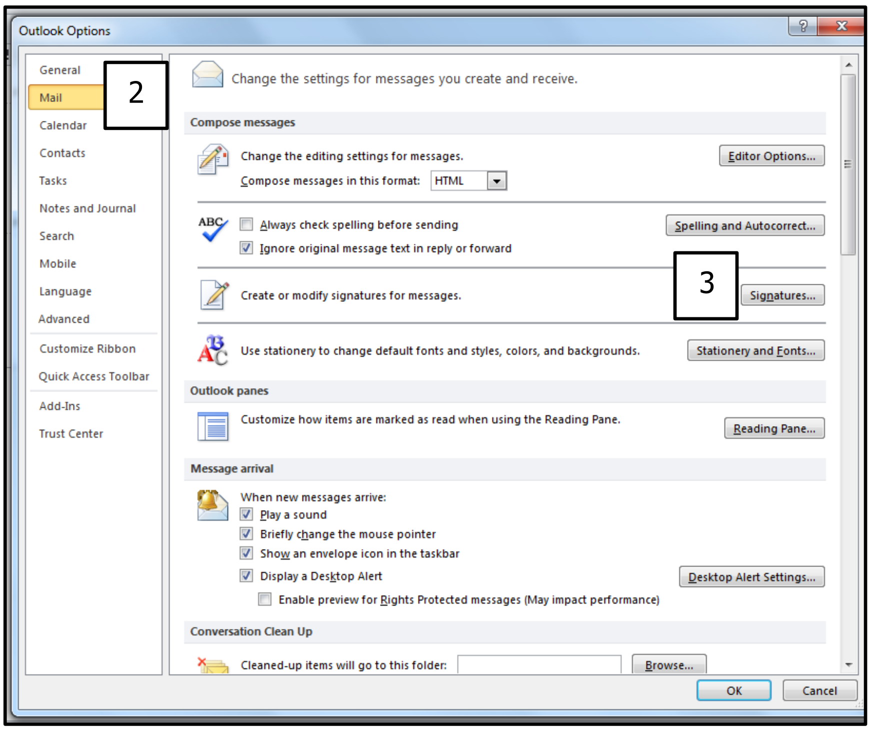


Add a Custom Email Signature

A custom signature is text added at the end of a message to provide any information you want to display. Along with your name, you may want to include your title, company, phone number, and any other pertinent information. You can create multiple signatures for use in business & personal emails.

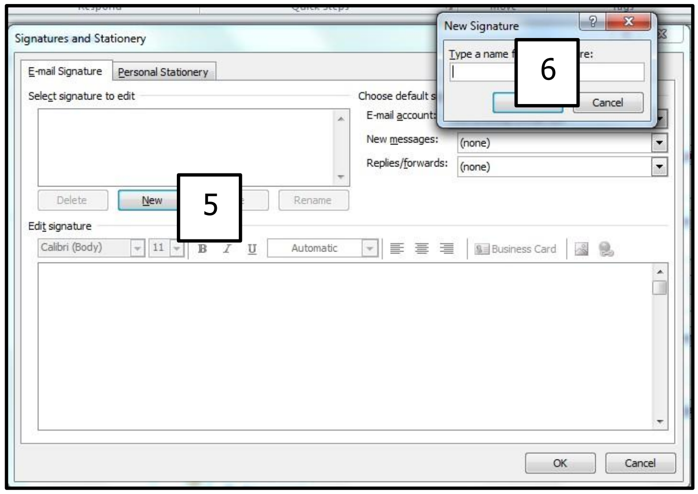
Set Up and Design Custom Signatures

1. Click **File** and then click the **Options** button.
2. From the **Left pane**, click **Mail**.
3. In the **Compose Messages** section click the **Signatures** button.

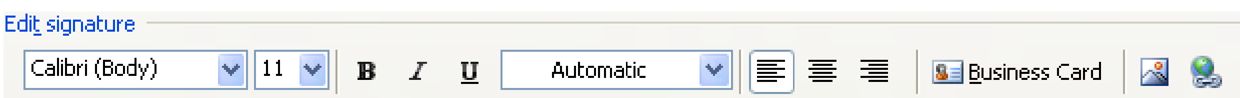


4. The Email Signature dialog box appears.

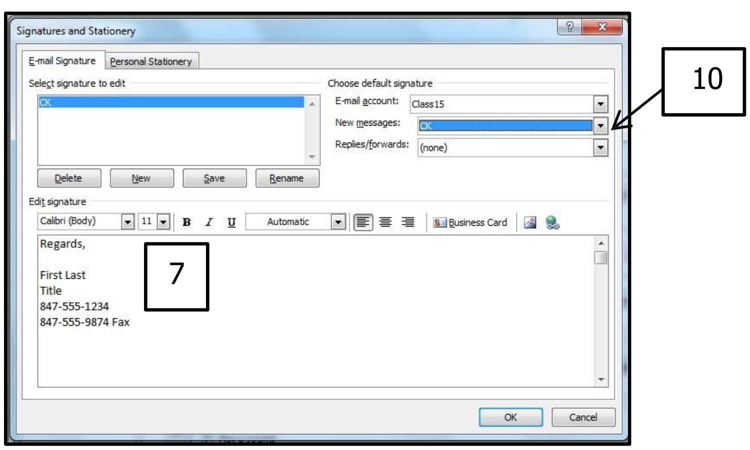
5. Click the **New** button. The New Signature box appears.



6. In the Type a Name for this Signature box, Type your **Initials** and click **OK**.
7. In the text area, **Type your signature text**.
8. In the Edit Signature area, change the **font**, **font size**, **colors**, etc.
9. Using you mouse, select any text you have already typed in order to make changes.

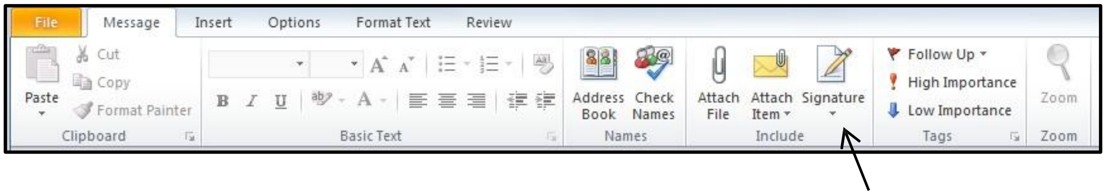


10. If needed, click the **down arrow** in the **New messages** box and click on your **Initials** so it is set as the default signature.



11. Click **OK**.
12. Click **OK** to close open dialog boxes.
13. Click on the **New Email** button to see Your Signature as it will now appear in your new messages.

If you have multiple signatures on your account you would choose the correct one by clicking the down arrow on the Signature button.



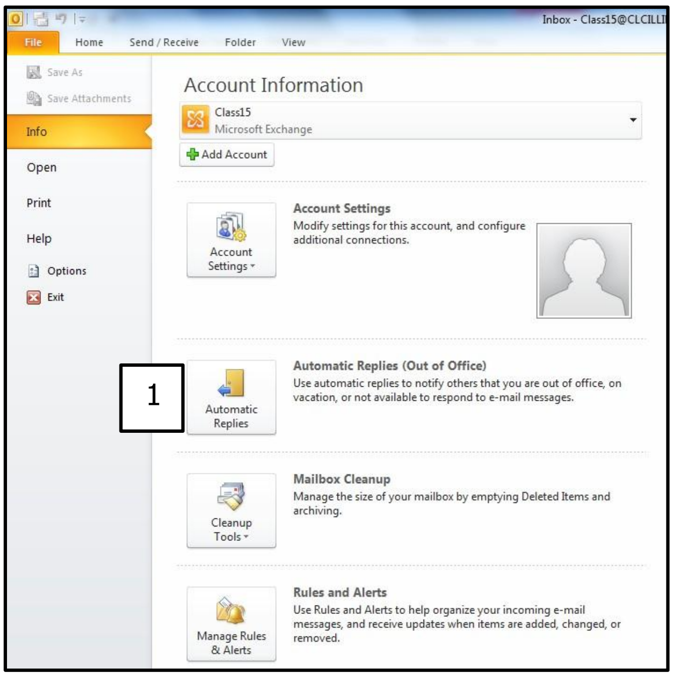
Send an Email Message with Signature

1. Click on the **Mail** button in the Navigation pane.
2. From the **New group**, click the **New Email** button.
3. Click in the **To** button and select **everyone in today's class**.
4. In the Subject area type: **Dept. Meeting**
5. Click in the Message box and type: **Please plan to attend this week's meeting on [type this Friday's date] at 10:00AM**.
6. Click **Send**.

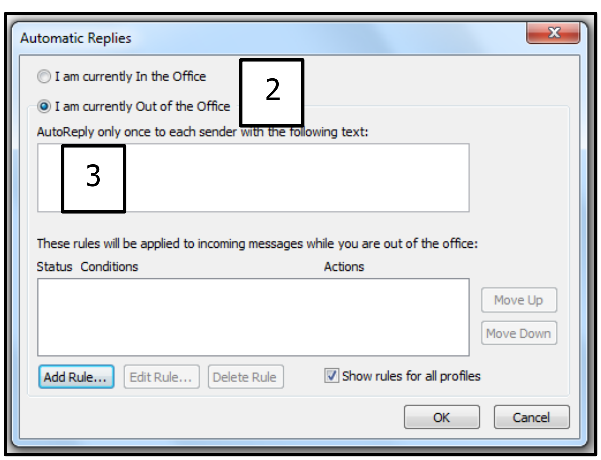
Out of Office Reply Message

This feature can be used to send an automatic out-of-office-reply message letting the sender know the email they sent will not be read immediately. Note: Out of Office Replies only work if you are using Outlook through a network server.

1. Click **File** and click the **Automatic Replies (Out of Office)** button.

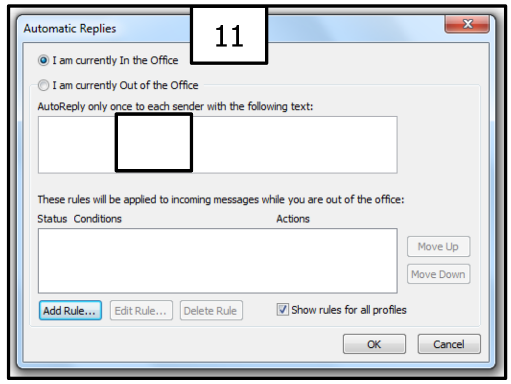


2. Click in the radio dial **I am Currently Out of the Office**.



3. In the Auto Reply area type: **I will be out of the office until (next Friday's date).**
4. Click **OK**.
5. Begin and Send a new message to your partner with no Subject line or message text.
6. The Out of Office message will be received shortly.

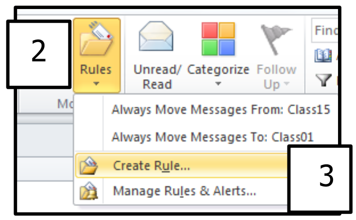
7. After receiving the Out of Office reply, change your status back to I am Currently in the Office.
8. Click **File** and click the **Automatic Replies (Out of Office)** button.
9. Click in the radio dial **I am Currently In the Office**.
10. **Delete message** from **text** area.



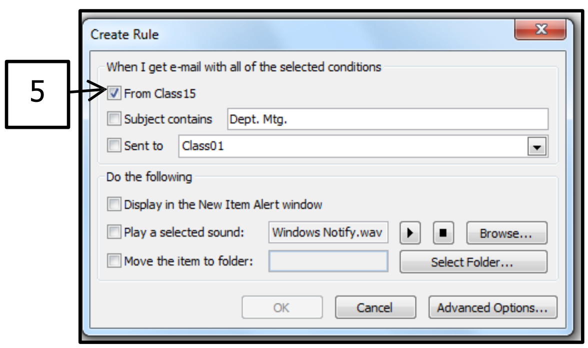
Creating Rules to Move an Email Message into a Folder

You can set up a rule so that incoming messages from desired people go into that particular folder. This is great for separating email by department. Because you have the most email from your partner, create a rule to automatically move emails into the Dept. Email folder.

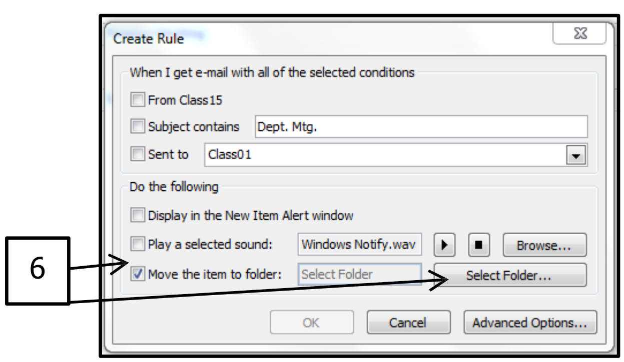
1. Click on an **email message** from your partner.
2. From the **Move group**, click the **down arrow** on the **Rules** button
3. Click **Create Rule**.



4. The Create Rule dialog box appears.
5. Under **When I get email-with all of the selected conditions**, click the check box in **From Class** [**your partner's email address**].



6. Under **Do the following**, click the check box **Move the item to folder** and click the **Select Folder** button.



7. The Rules and Alerts dialog box appears.

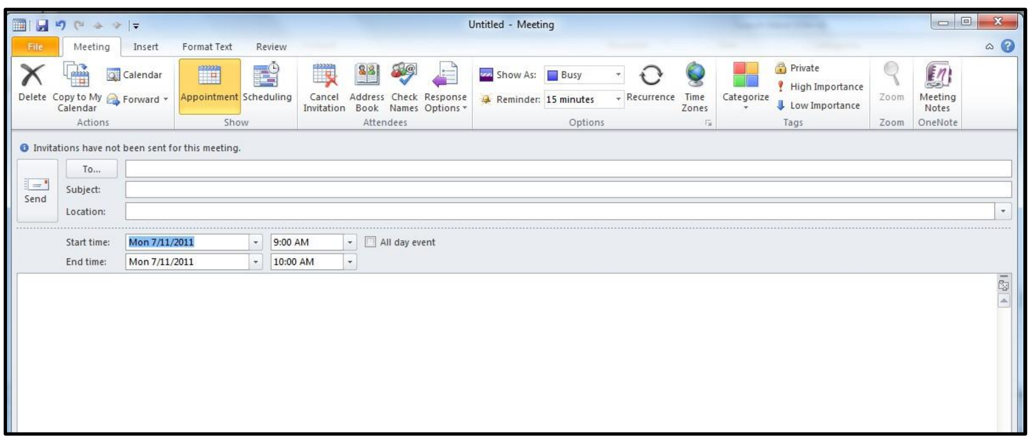
Using the Meeting Planner

Using the Meeting Planner when you work on an Exchange network has the benefits of seeing colleague's schedules to find a time when most people can attend the meeting.

Schedule an Annual Picnic Planning Meeting.

Scheduling a Meeting

1. Before scheduling a Meeting, the Instructor will ask students in this class to reschedule the Finance Review meeting for various times on the first Monday of the next Month. Since the Meeting will be scheduled for this day, and various people will be busy at different times, this will show a true representation of how the Meeting Planner works.
2. From the Date Navigator, click on the **first Monday** of **next month**.
3. From the **New group**, click the **New Items** button and then click **Meeting**.
4. The Meeting Window opens.



5. Click the **To:** button and **select ALL** of the **people** in this **training class** to come to the meeting. Include ALL people in this class as required. Note the other options available such as Optional [people they may attend the Meeting] and Resources [this is for reserving resources for the Meeting.]

   Type the following:

   Subject: **Annual Picnic Planning Meeting**

   Location: **Conference Room B113**

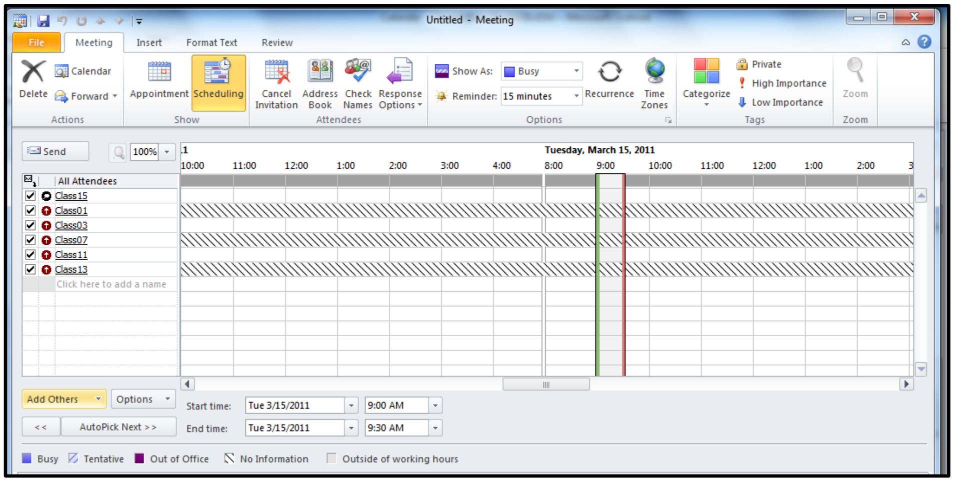
   Start Time: **9:00 AM**

   End Time: **10:00 AM**

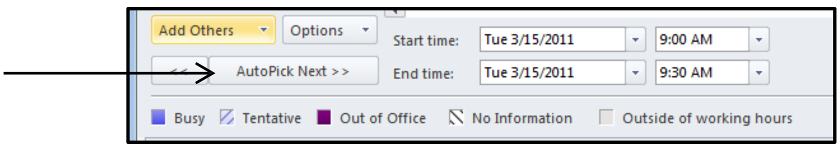
6. In the message area, type:

We need to start planning for our Annual Picnic. There will be coffee and donuts at the meeting. See you there!

7. From the **Show group**, click on the **Scheduling** button to view everyone's schedule.



8. If any invitees are listed as busy during the proposed meeting time, click **Auto Pick Next** to view the 1st possible time all invitees are available. This option is located at the bottom of the Scheduling window.

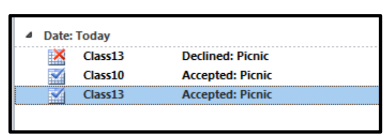


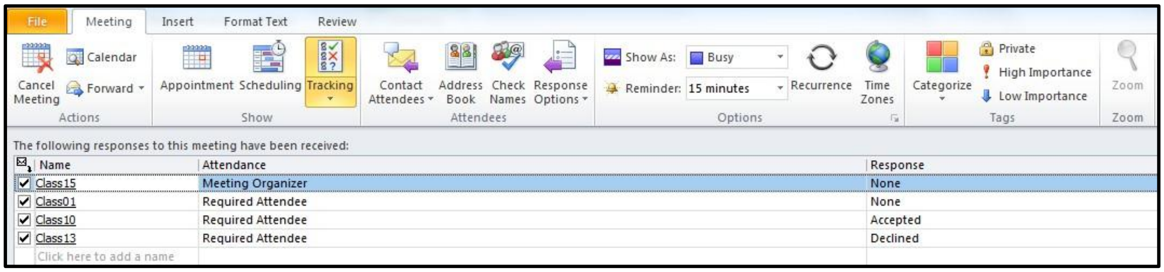
9. The color codes indicating Busy, Tentative, Out of Office, and No Information are also located here.
10. When you find a time all invitees are available click the **Send** button. The meeting is automatically added to your calendar.

Responding to an Invite and Tracking Attendees

An email request is sent to the Attendees you've selected for the meeting. When Attendees receive the email they may reply Accept, Tentative, or Decline.

1. In this exercise, some people will **Accept the invite**; and some will **Decline**.
2. To track the status of each invitee:
3. Double-click the meeting entry in your calendar.
4. From the **Show group**, click the **Tracking** button. You can see each person's response.
5. You will also see when people Accept or Decline via email in the Inbox.





Rescheduling a Meeting

1. In the Date Navigator, click on the **last weekday** of the **current month**.
2. Double-click in the **Planning Meeting**.
3. Change the time to **2:00 PM** to **3:00 PM**.
4. In the message area, type:

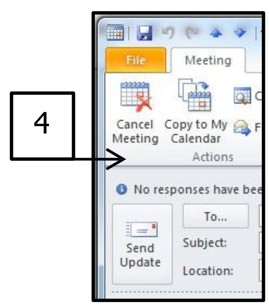
Sorry, but I need to reschedule this meeting. Coffee and donuts will still be served. Thanks!

5. Click on the **Send Update** button. The meeting time changes on your calendar and all Attendees receive a new email. They will be able to Accept Decline. We will not do this in class.

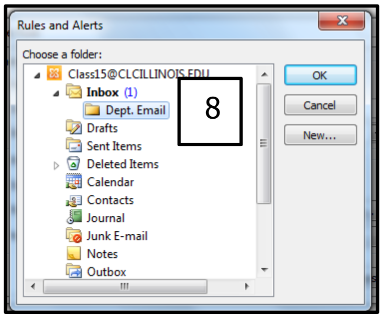
or

Cancelling a Meeting

1. Occasionally you will need to cancel a Meeting.
2. In the Date Navigator, click on the **last weekday** of the **current month**.
3. Select the **Picnic Planning** Meeting.
4. From the **Actions group**, click the **Cancel Meeting** button.
5. The meeting is removed from your calendar and all Attendees are sent an email telling them the meeting has been cancelled.



8. Click the **Dept. Mail** and click **OK**.



9. The Rules Success dialog box appears to indicate you have successfully created the rule.

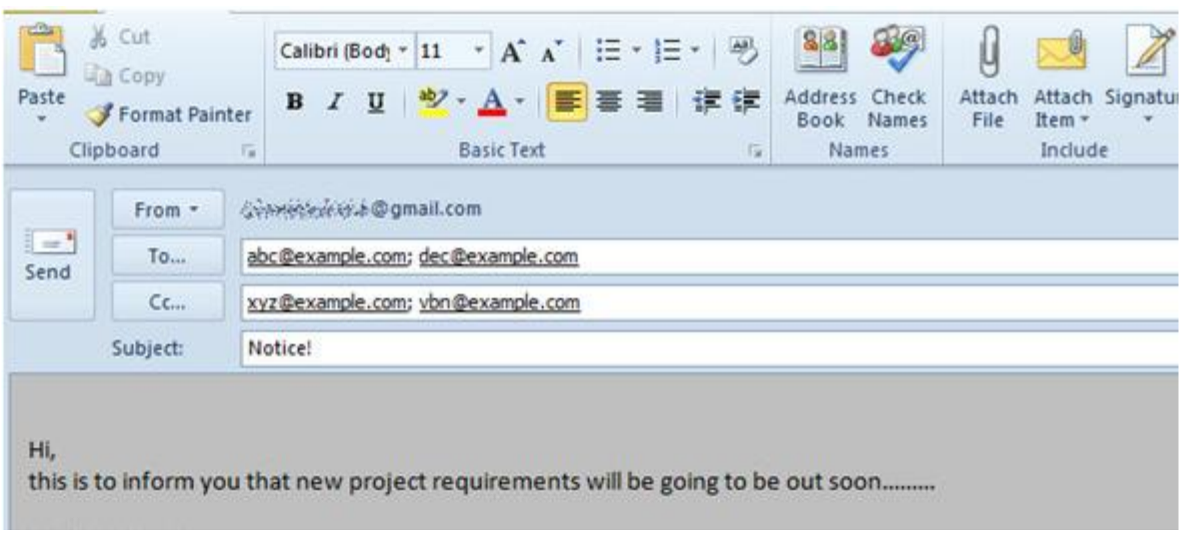
10. Click the check box in **Run this rule now on messages already in the current folder** and then click **OK**.

11. All of your emails messages from your partner should have moved in the Dept. Emails folder.

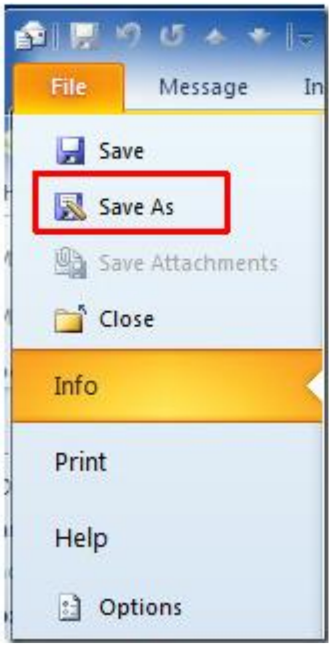
Create and use Email Templates in Outlook 2010

1. To start out with creating a template, launch Outlook 2010, head over to Home tab and click New E-mail.

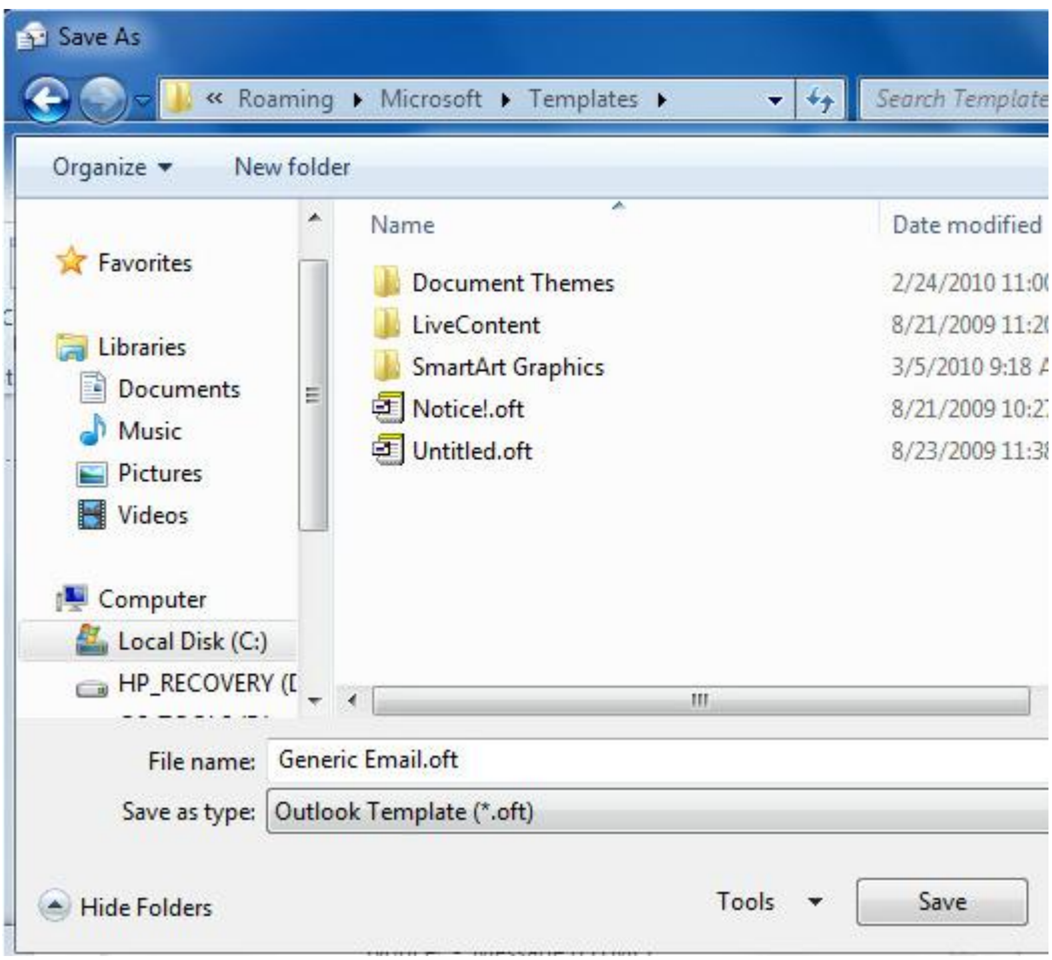
2. Start composing an email, enter recipients email address(es), subject and main email body text.



3. Now on File menu, click Save as.

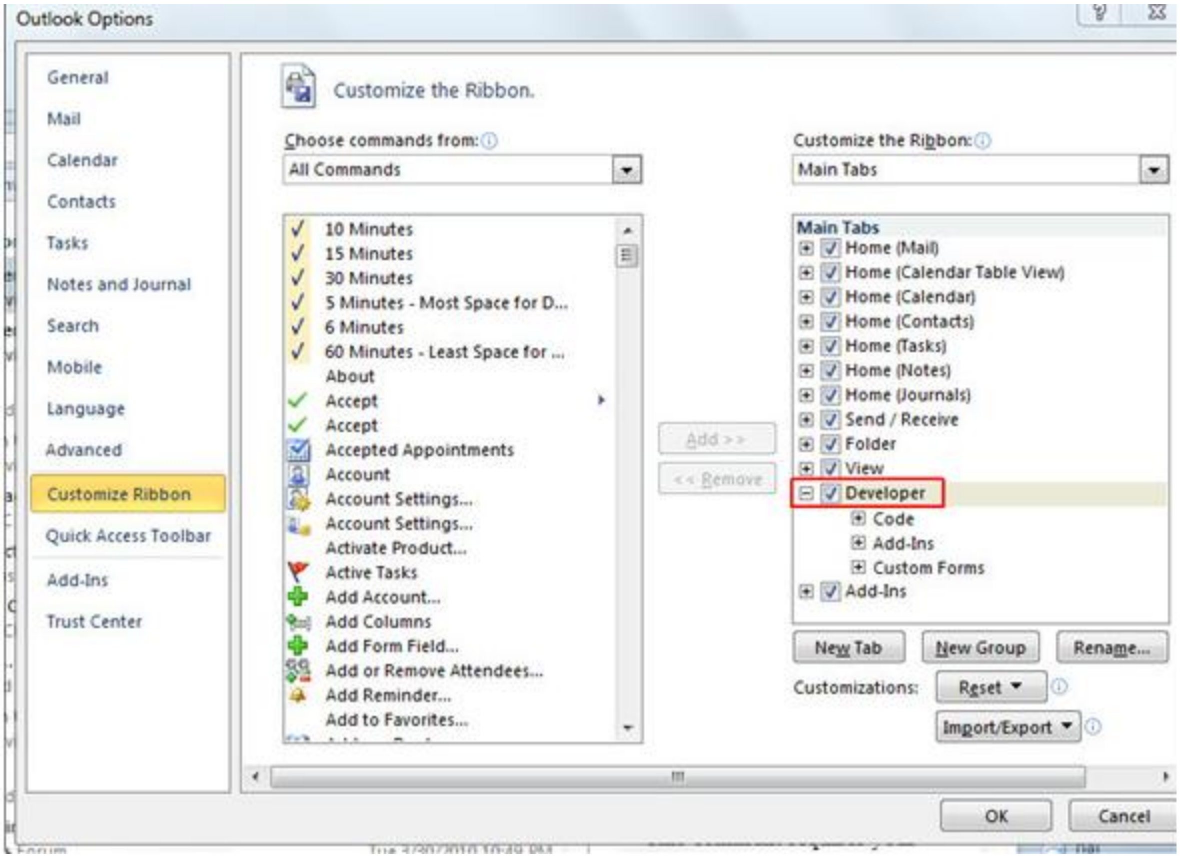


4. From Save as type list, select Outlook Template and give template an appropriate name.

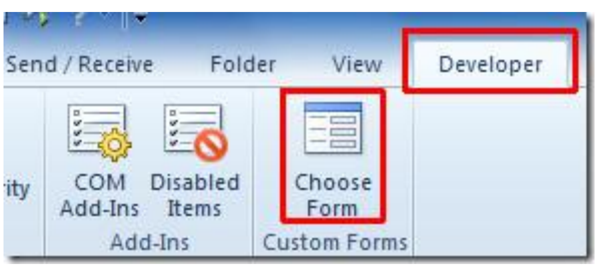


5. For using this template, navigate to Developer tab (in case you don't find Developer tab,

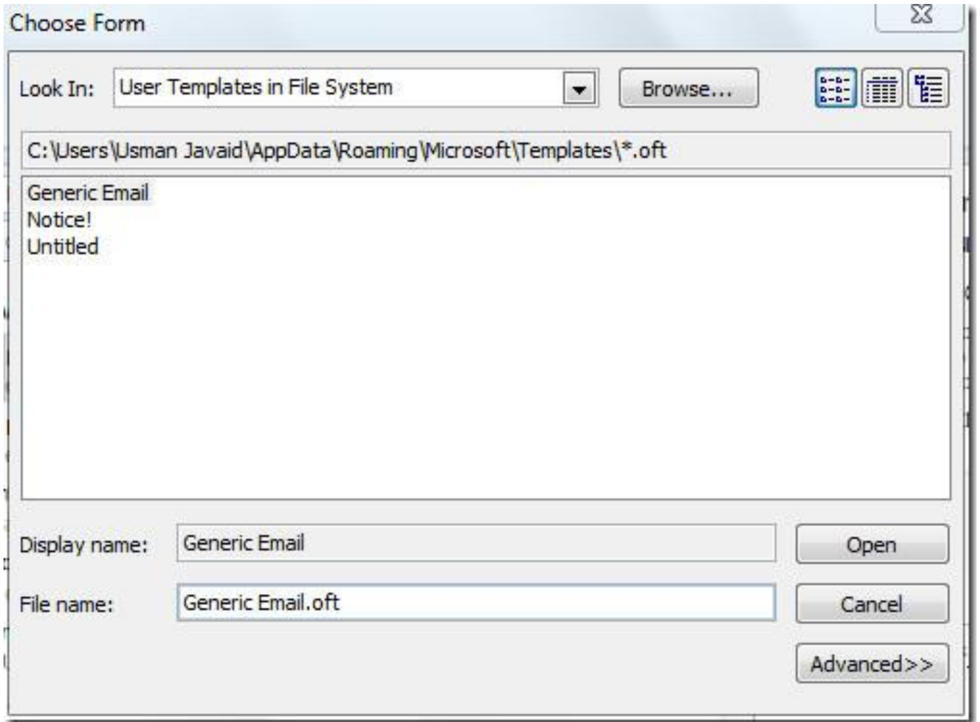
go to File menu, click Options, and in left pane click Customize Ribbon, from right pane enable Developer check-box. Click OK to to see Developer tab on the ribbon.)



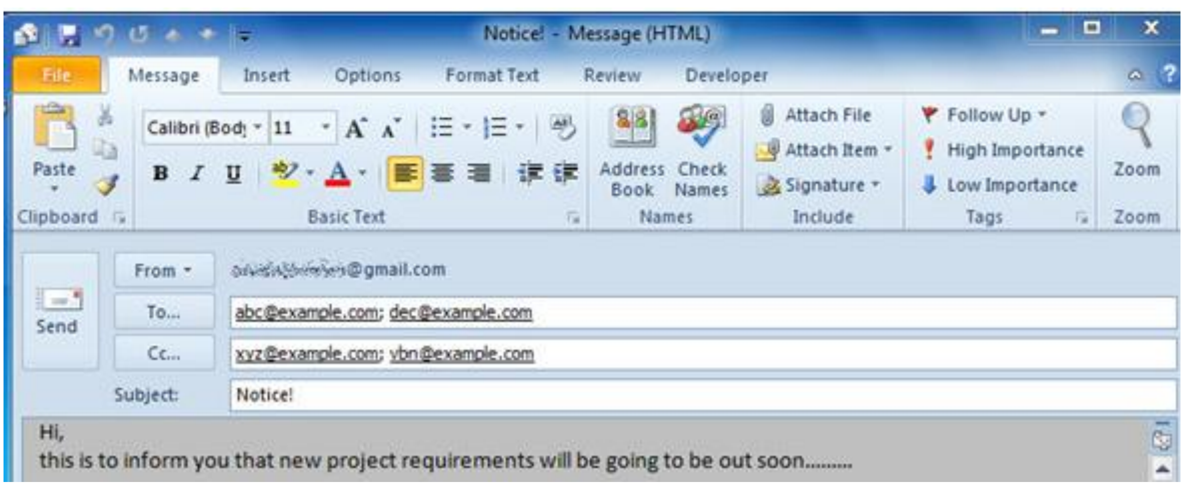
6. Now head over to Developer tab, click Choose Form.



7. It will bring up Choose Form dialog, From Look In drop-down list, select User Templates in File System, from main dialog window, select the previously created template and click Open.



8. It will immediately open email template, with same subject, recipients email addresses, theme and email body text. Now you can send it and use this template again by following the same procedure.

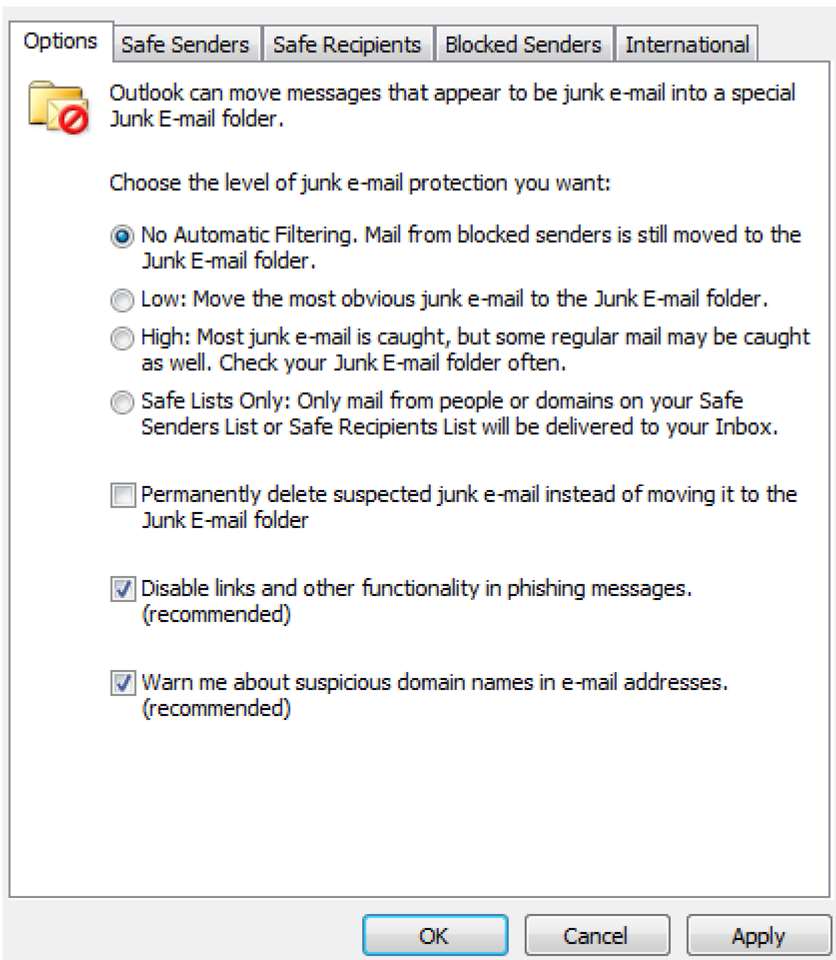


Turn off Junk e-mail filter

1. Select the **Home** tab

2. Click on **Junk** button and then **Junk E-mail Options**

3. Set it to **No Automatic Filtering** and click **OK**

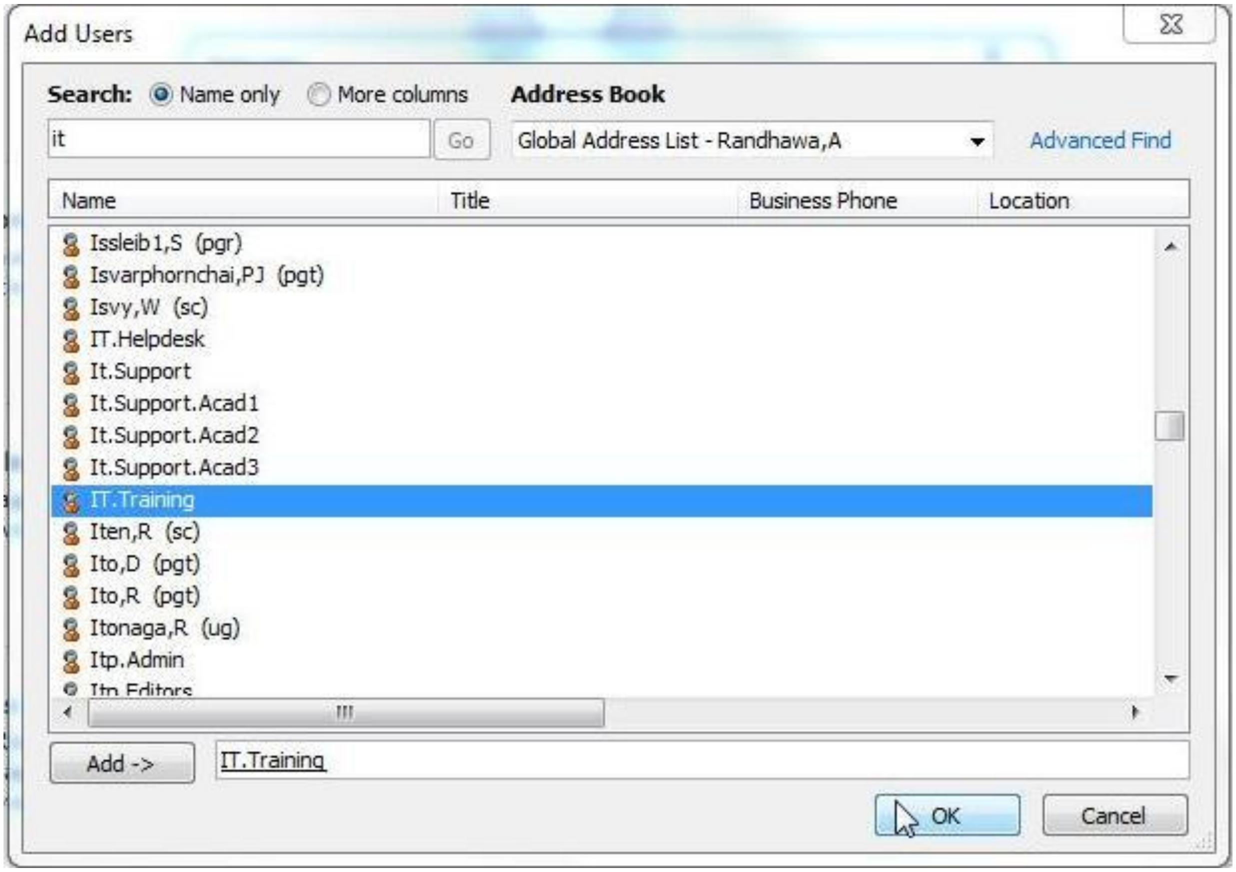


Granting Delegate Access to your Email

1. Click **File tab | Info | Account Settings | Delegate Access**

2. Click **Add...** *The Add Users dialog box will pop up*

3. Select the username of the delegate(s) and click **Add**



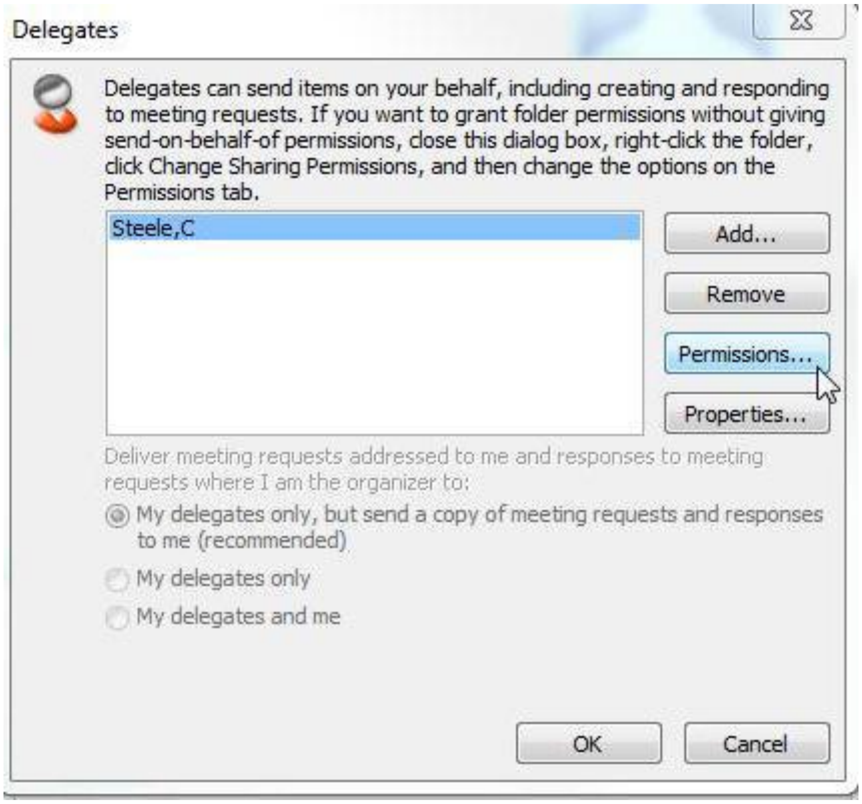
4. Click **OK**

Setting permissions

Once you've selected a delegate, you need to set the level and type of permission that delegate should have.

To set permissions:
1. Click **File | Info | Account Settings | Delegate Access**. *The Delegates dialog box will pop up*

2. Select the delegate in question and click **Permissions...**



3. For each item (e.g. Calendar, Tasks, Inbox) select the level of permission you want to grant

None: delegate cannot access this feature of your account
Reviewer: delegate can read items
Author: delegate can read and add items
Editor: delegate can read, modify and add items

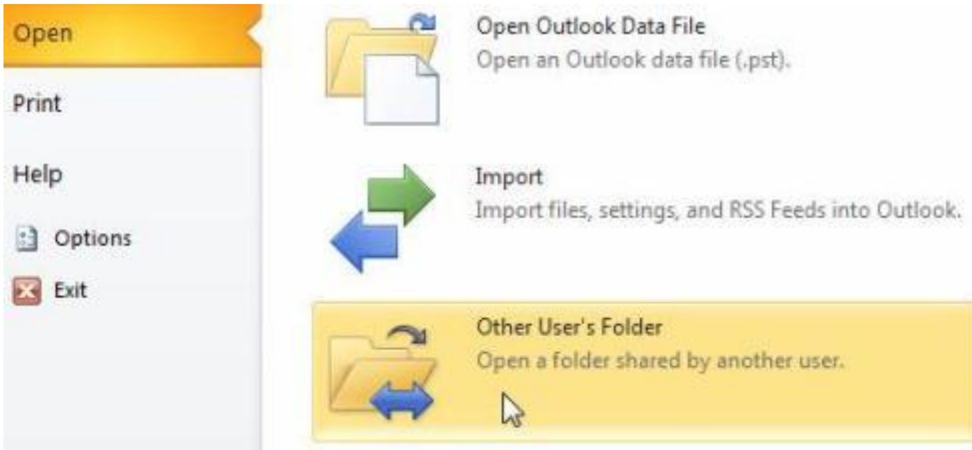
2. Click **OK**

3. Click **OK** again

Note: Emails and other items sent by a delegate will be displayed as from the delegate on behalf of your name. For example, From: Joe Bloggs on behalf of Janet Smith. In order to have a delegate send an email as if they were you, full permissions must be set up by your User Support Team.

Using the delegate settings

Once you have set up permissions for a delegate, that delegate can access the items they have permission to see by clicking **File | Open | Other User's Folder** and selecting your name.



Granting Access to your Mailbox

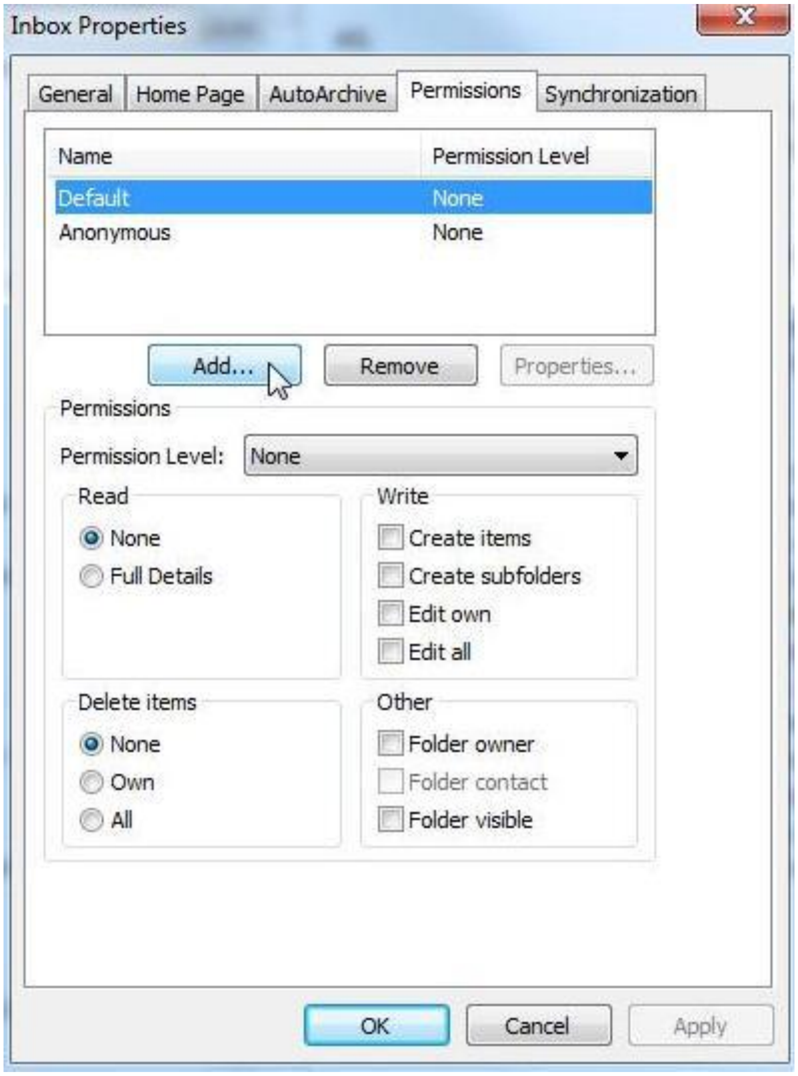
If the delegate needs to regularly access parts of your mailbox, and would like your mailbox to appear in their folder list, you must grant them access to your mailbox by setting permissions. They will only see the folders and features you granted them access to in the Delegate Settings, however they won't have to manually open your folders through the File menu. By granting permission to your mailbox, you simply make it possible for them to add your mailbox to their folder list.

To grant access to your mailbox or folder to a delegate:
1. In your folder list, right-click on your mailbox or folder name

2. Click **Properties**

3. Select the **Permissions** tab

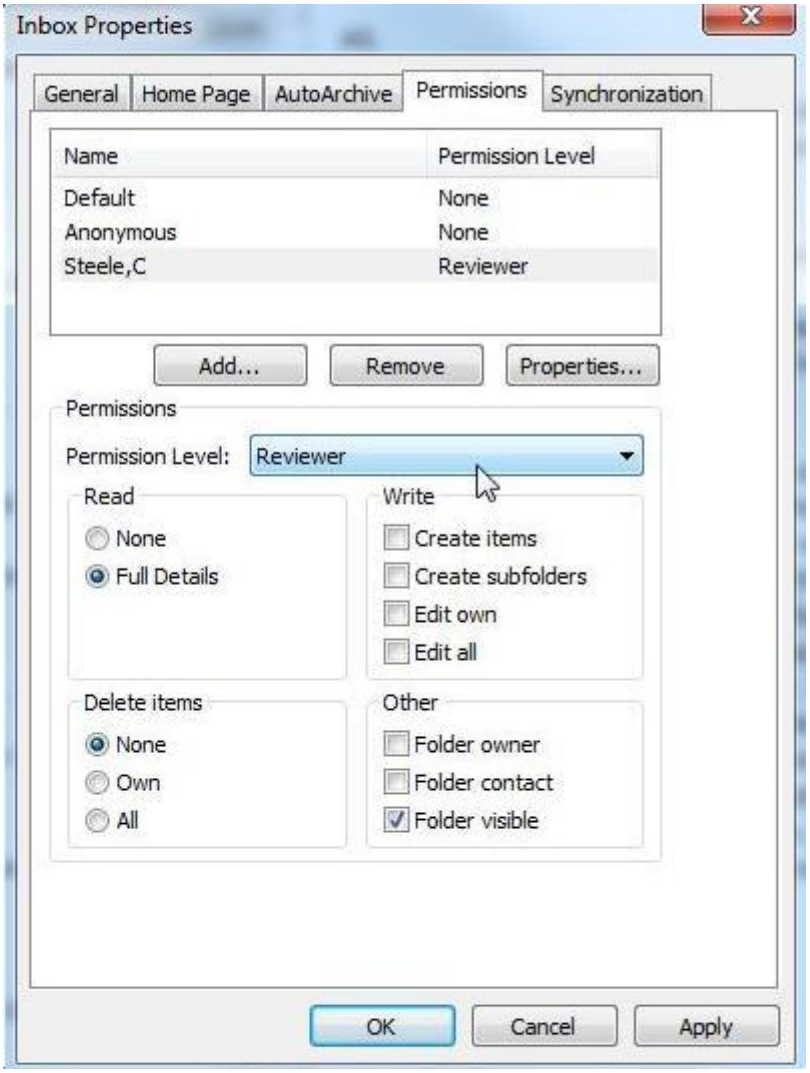
4. Click **Add...**



5. Select the username of the delegate

6. Click **OK**

7. Select the delegate and in the **Permission Level** drop-down menu select **Reviewer**



8. Click **OK**

Note: You can also set different permission levels for individual folders in your mailbox using the above method on each folder.

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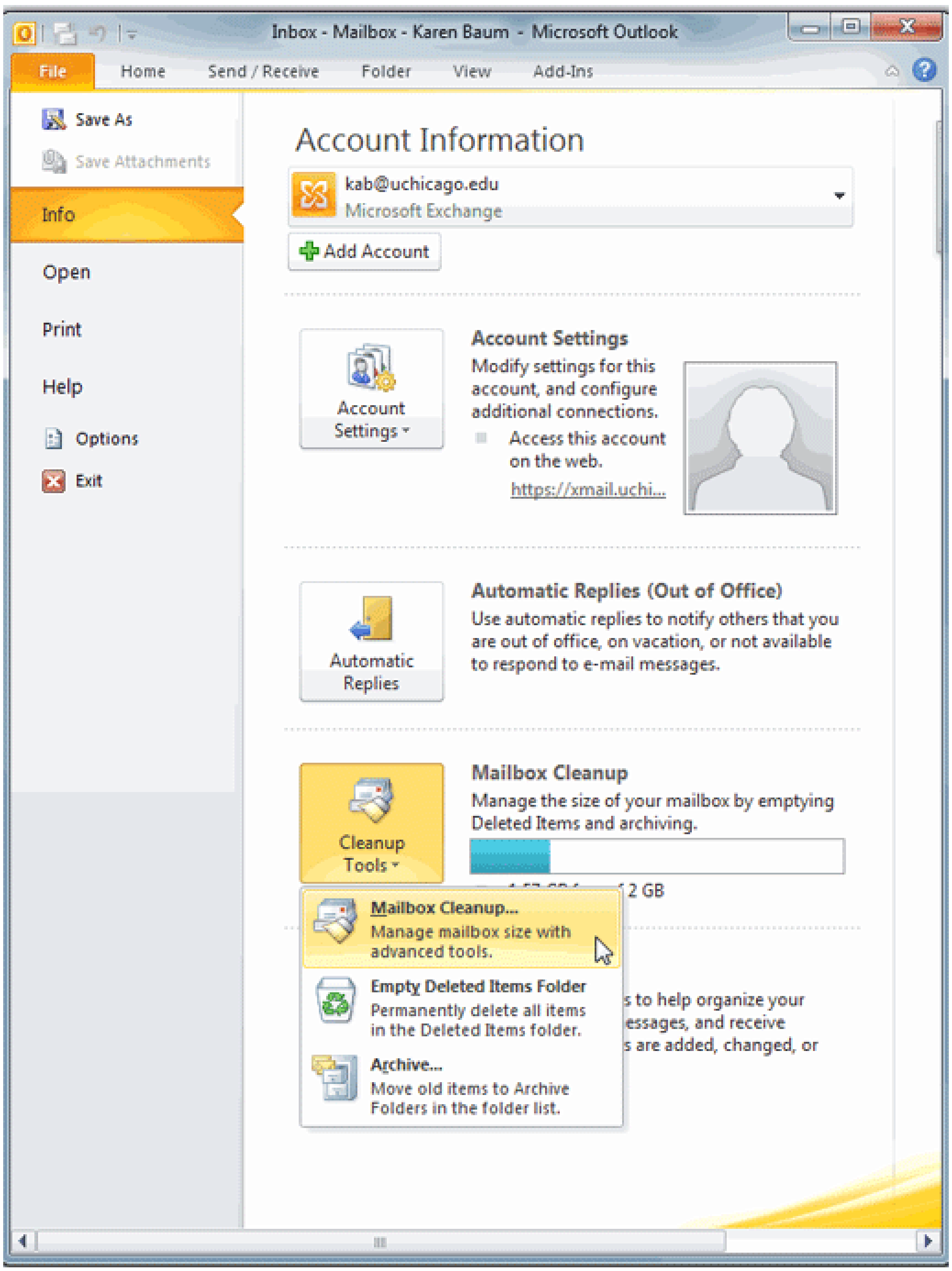
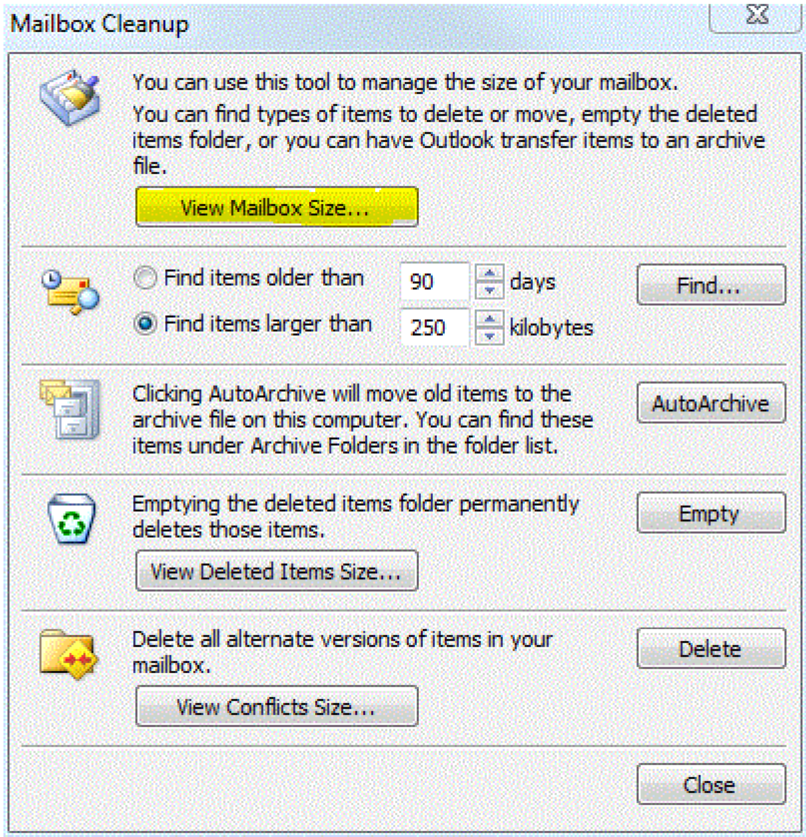
Check the Size of Your Mailbox

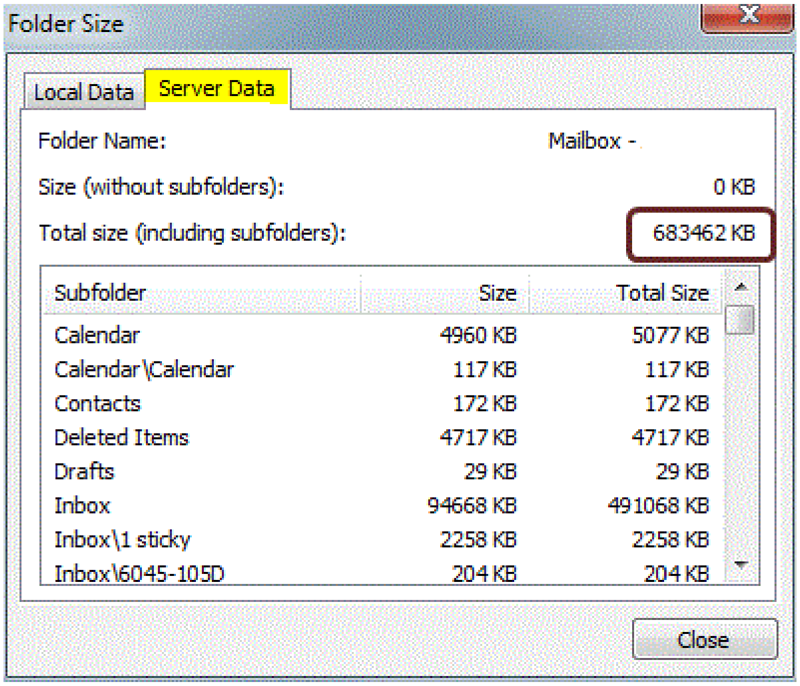
1. From the **File** tab, under **Info**, select **Cleanup Tools**, then **Mailbox Cleanup...**



2. Click the **View Mailbox Size..**. button.



3. Select the **Server Data** tab of the Folder Size window.

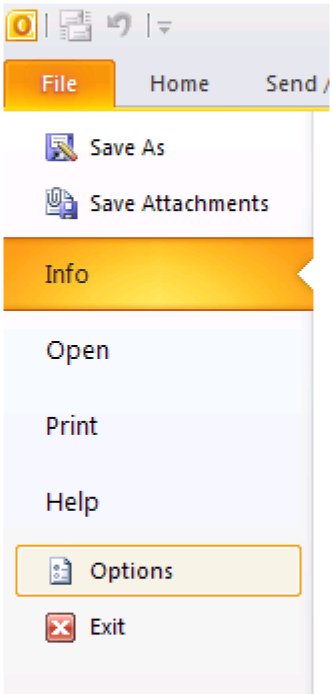


Since 1,000,000 KB = 1 GB, the above example displaying 683,462 KB converts to .68 GB, leaving nearly 1.5 GB of storage still available.

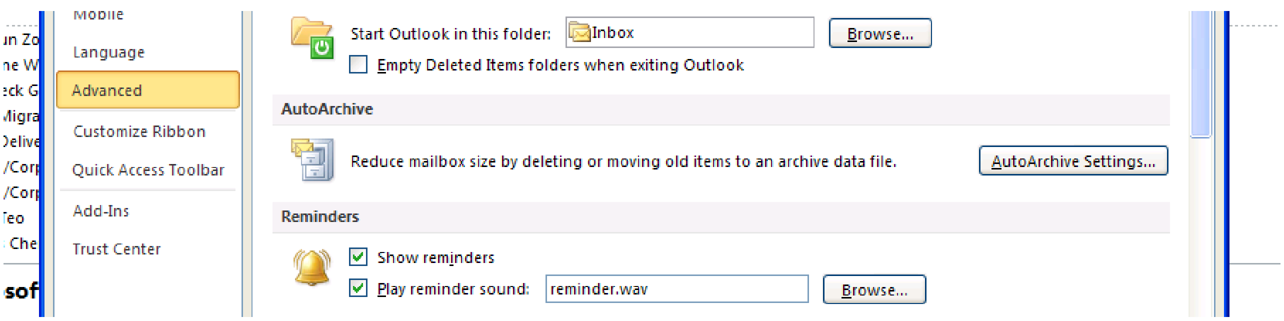
Note: Be sure to look at the **Server** tab, not the **Local** tab. The size of your folders listed on Local do not count towards your email storage quota, since these files are being stored on your 'local' hard drive.

Archive Your Mailbox

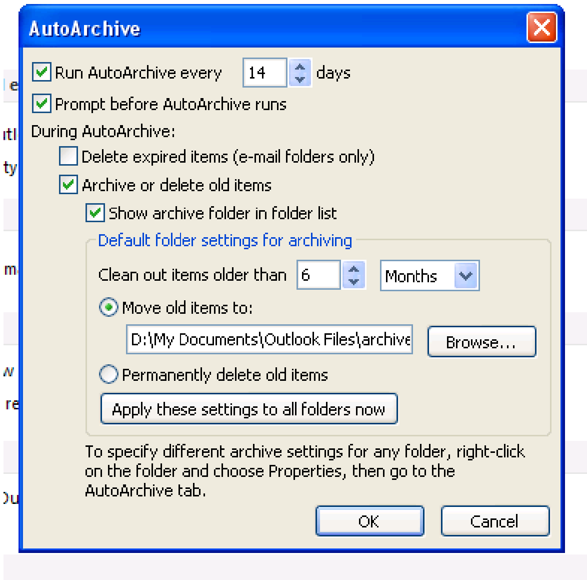
1. Click the File option on the menu ribbon and choose Options.



2. Click the Advanced option, then click the AutoArchive Settings button on the right hand side.



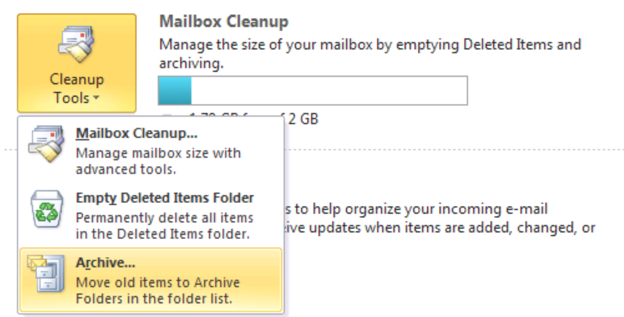
3. Now the main AutoArchive Setting window, will appear, choose the options that best suit. Typically setting the options to run every 14 days and archive the emails over 12 months old should be suitable.



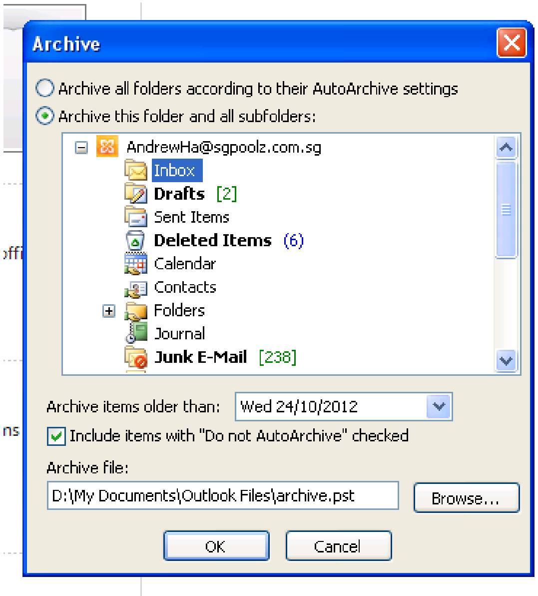
4. On the field **Move old items to** , click **Browse**, and set the location as : **MyDocuments\Outlook Files*userID+year*_archive.pst**.

   Example : MyDocuments\Outlook Files\MaryLow2012_archive.pst

5. When done, click the **Apply these settings to all folders now** button, then click OK and come out of all menu's.
6. Now the final step is to actually kick off your first archiving session, to do the again click the Home menu in the ribbon, then go to Info option on the left hand side.
7. In here you need to click Cleanup Tools button and choose Archive.



8. On the following screen select the top option "Archive all folders according to their AutoArchive Settings", then simply click OK. Your email will now be archived as per the settings you set earlier, depending on the size of your mailbox and how far back you want to archive then this can take some time.

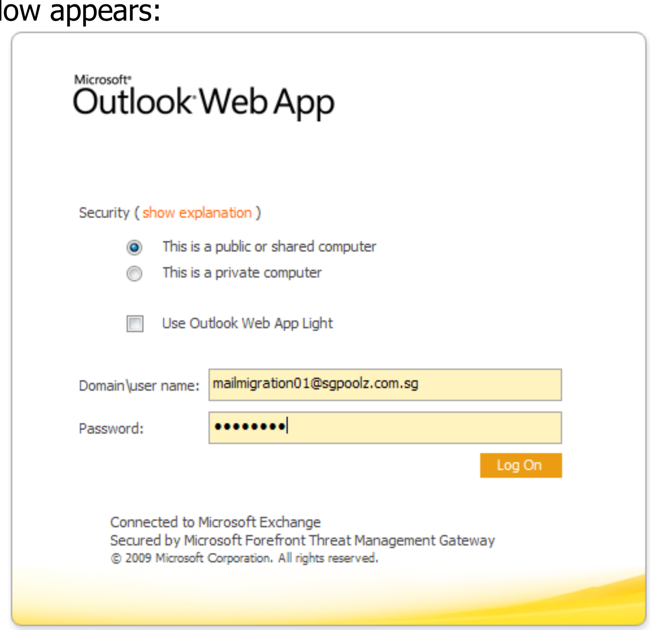


Outlook on the Web App

Outlook on the Web allows you to log into your Outlook account from any computer, anytime from anywhere. All of your Emails, Contacts and Calendar appointments transfer to the Outlook on the Web.

Accessing Outlook on the Web App

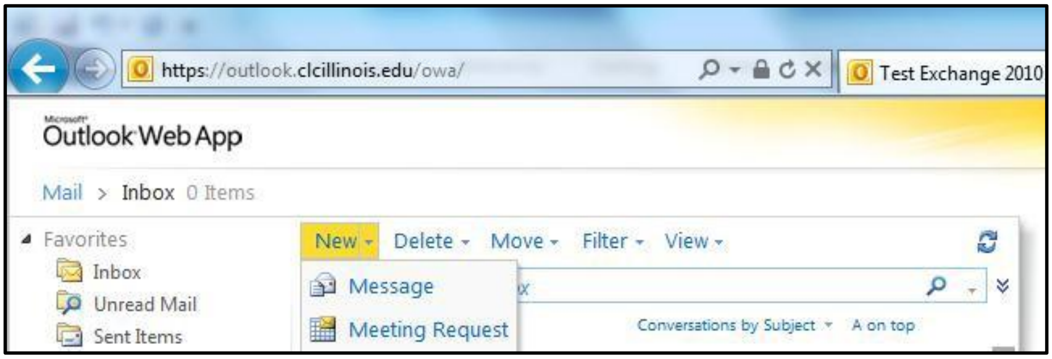
1. Go to your browser and type in: https://webmail.sgpoolz.com.sg/owa
2. The follow window appears:



3. Type in your **username@sgpoolz.com.sg**
4. Type in your password and click the **Sign In** button.

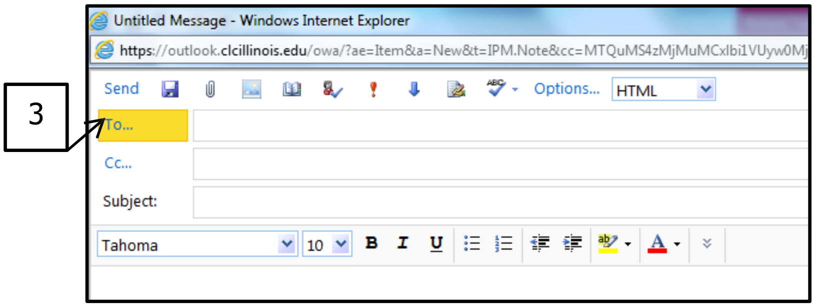
Creating a New Email using the Global Address Book

1. Click on the **New** button at the top. Notice you can click the down arrow to select Meeting Request.

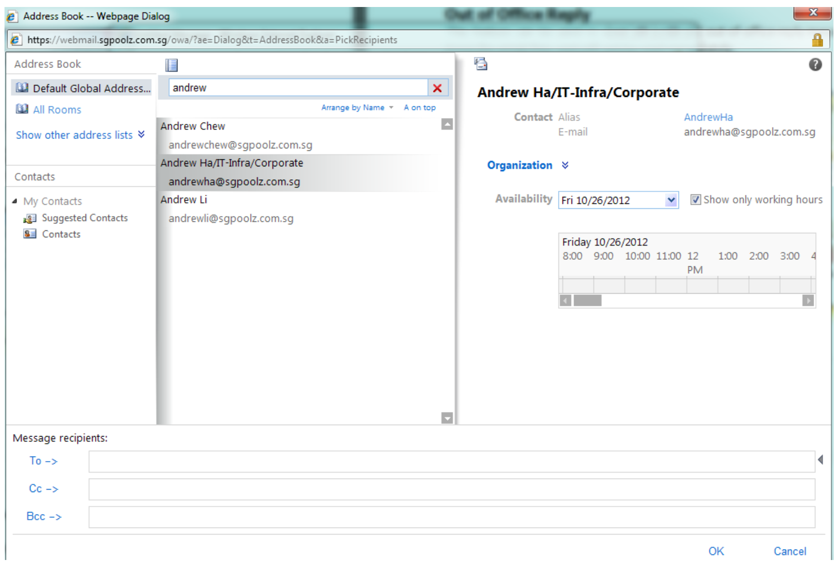


2. The Untitled Mail Message dialog box opens.

3. Click the **To** button.



4. The Default Global Address Book Displays.
5. Click into the **Search box** and begin to type the person's name. You can type either the person's first or last name.

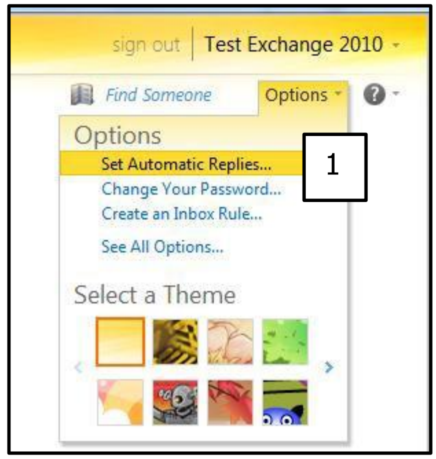


6. When you locate the name of the person you wish to email, **double-click** on their name so it appears in the **To** box.
7. Click **OK**.
8. Add the subject and type the email and then click the **Send** button.
9. The Default Global Address is the default location for new emails. If you are sending an email from your Contacts, click Contacts to locate the individual/s.

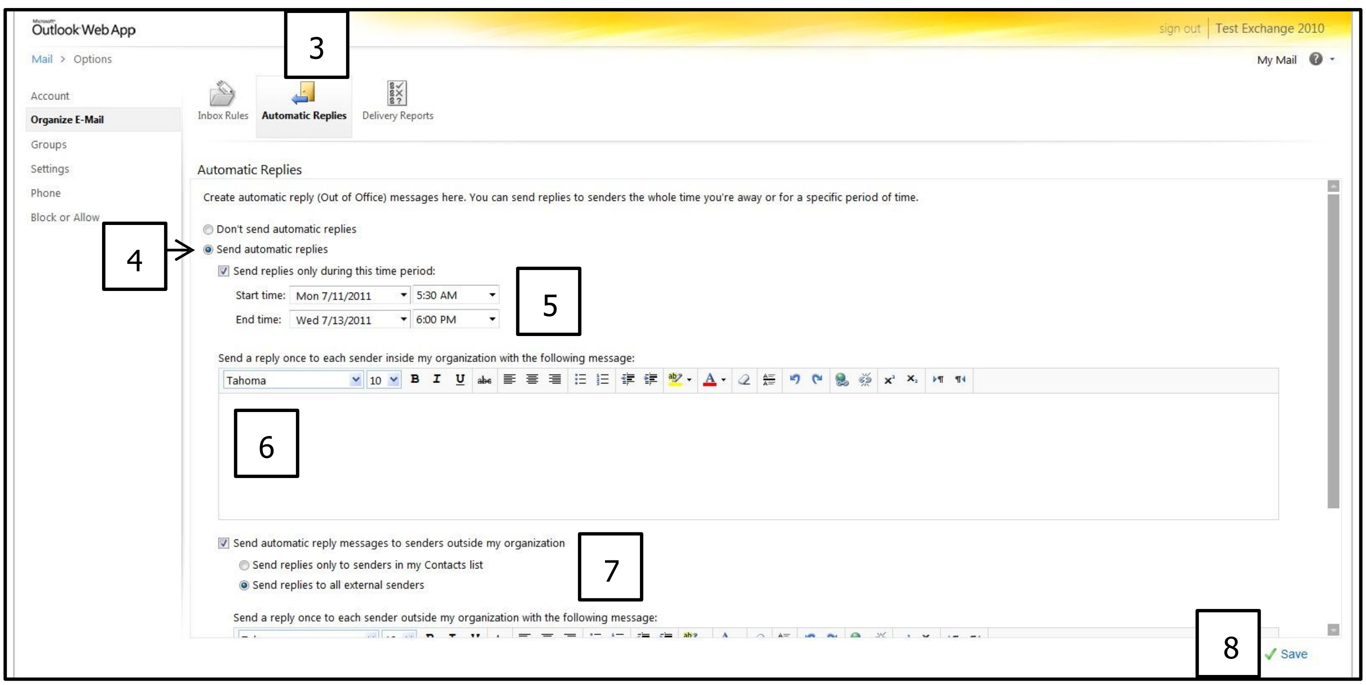
Out of Office Reply

This feature can be used to send an automatic out-of-office-reply message letting the sender know the email they sent will not be read immediately.

1. Click **Option** and click **Set Automatic Replies**.



2. The following window appears:



3. Click **Automatic Replies** button.
4. Click in the radio dial **Send Automatic Replies**.
5. Notice you can also **send automatic replies** for a **certain period** of **time**.
6. Click into the **message area** and type your **out of office response**.
7. Notice you can also send automatic replies to senders outside my organization.
8. Click **Save**.

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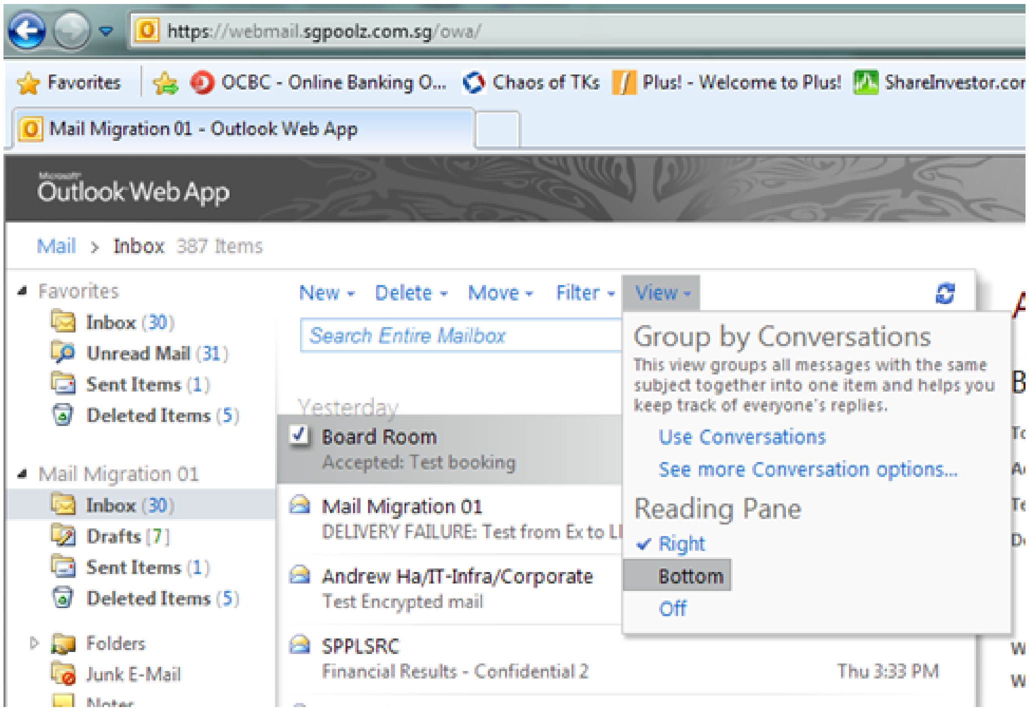
Reading Pane

1. From the **Inbox**, change the Reading Pane by clicking on **View** and then choose to view the Reading Pane on the bottom or on the Right.

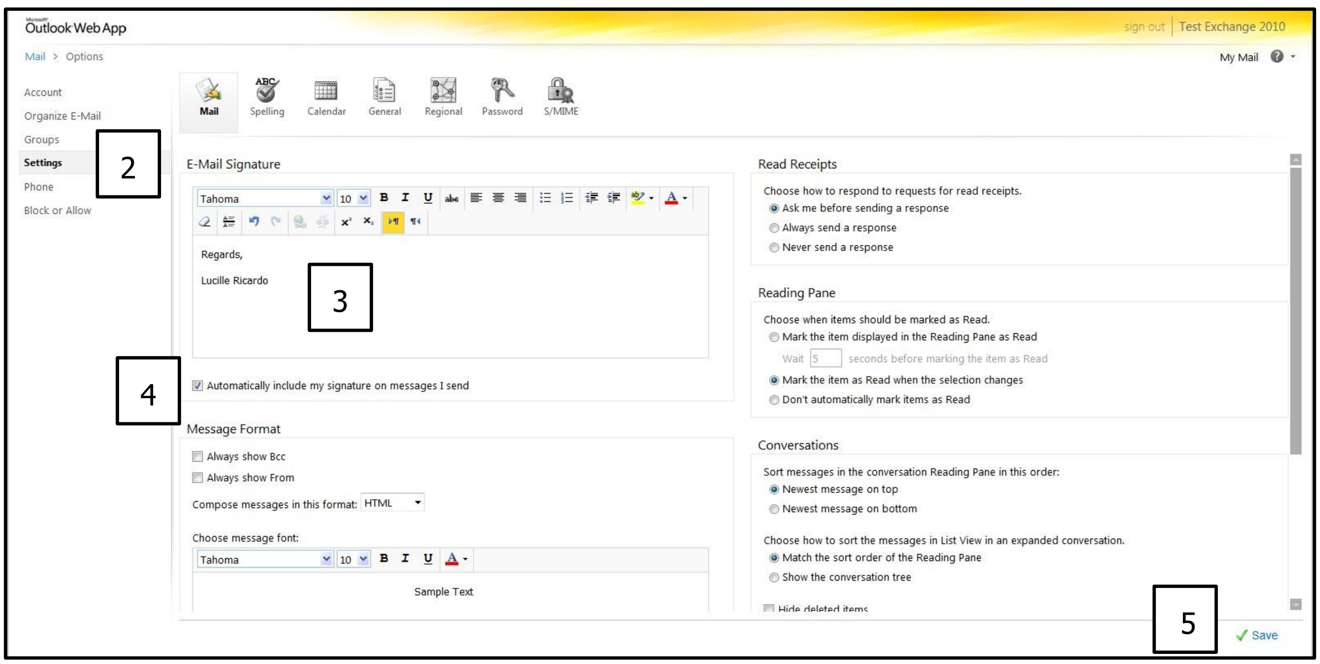


Settings – Signature & Read Receipts

Create an Email Signature, request Read Receipts, change default font, etc. from the Settings option.

1. From the **Inbox**, under **Options**, click **See All Options**.

2. From the **Left Pane**, click **Settings**.

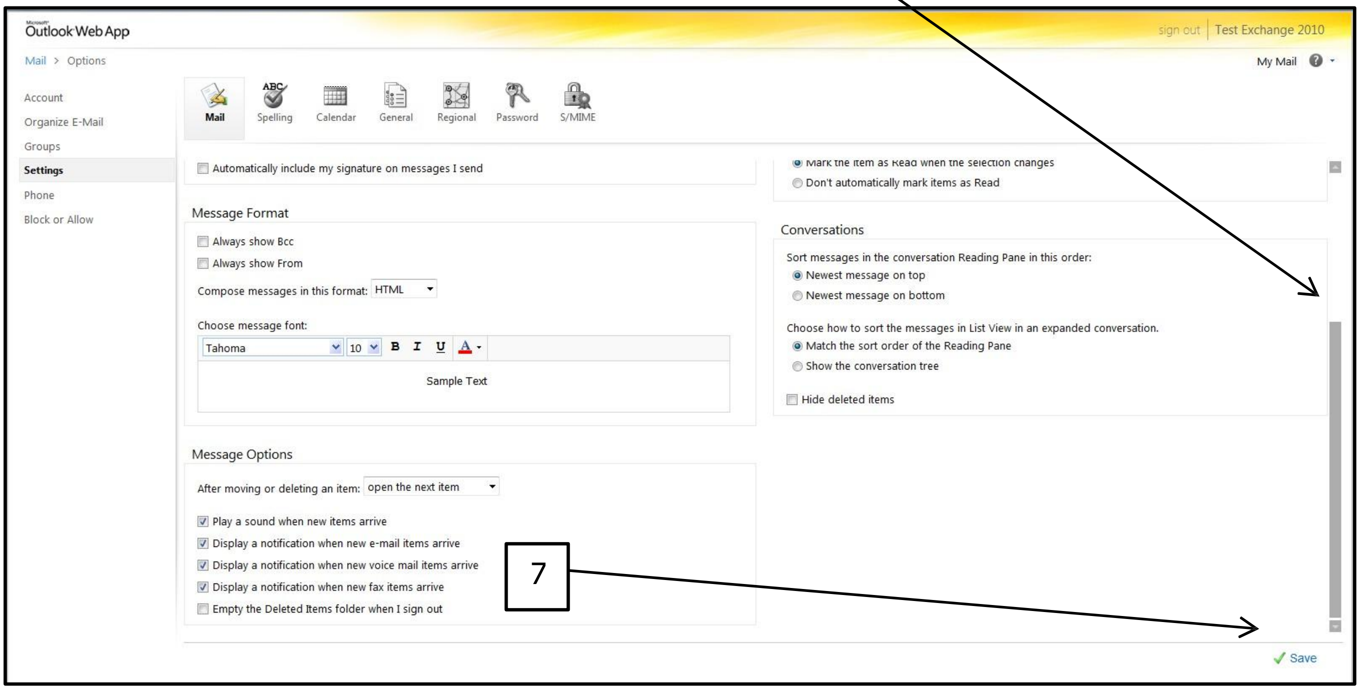


3. To add an E-Mail Signature, type in the information you wish to include.

4. Click in the box, **Automatically include my signature on messages I send** and then click the **Save** button.

5. Notice other options such as Message Font, Read Receipts, Reading Pane and Conversations.

6. Scroll down to view various Message Options.



7. **Check** or **uncheck** any **Message Options** and then click **Save**.