



Microsoft Outlook Introduction

Division of Information Technology

February 2016

Contents

Document Management History	3
Introduction	4
Getting Started.....	4
Using MS Outlook.....	4
What MS Outlook looks like when you open it	5
Customising MS Outlook.....	5
Standard Toolbar	6
Reading Emails	6
Deleting Email	7
Creating Folders.....	8
Moving Emails.....	8
Replying to a Message.....	9
Forwarding a Message.....	9
Creating New Messages	9
Selecting Recipients.....	10
Contacts.....	10
Using the Address Book.....	11
Attachments	11
Hyperlinks	13
Signatures.....	14
Formatting Text.....	14
Creating New Contacts	15

Document Management History

Version	Date	Author	Comments
0.3	February 2016	Julianne Harper, Personal Computing	Updates for MS Outlook 2013
0.2	September 2010	Education and Training Team, DIT	

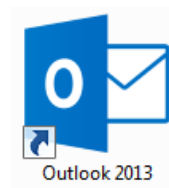
Introduction

The following module has been designed to offer a general introductory overview of **Microsoft (MS) Outlook 2013**. The primary focus of the module is to familiarise you with the MS Outlook 2013 environment and to provide directions for using the program daily in a work environment.

Getting Started

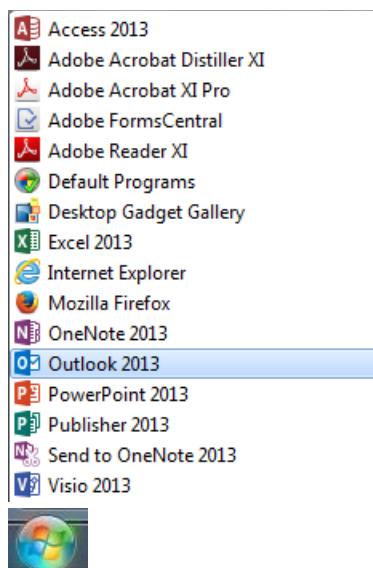
There are a number of ways to open MS Outlook:

1. Double click on the **Outlook 2013** icon on the desktop. It looks like this:



OR

2. Click on the **Start** button located at the bottom of your screen, select **All Programs** and click on **Outlook 2013**



Using MS Outlook

MS Outlook 2013 is a comprehensive package that offers an electronic diary system whereby appointments, events and tasks can be entered and tracked.

Detailed lists of contacts, both personal and professional, can be stored as well as a functional electronic mail component with a large number of beneficial features.

With the introduction of MS Outlook 2013, advanced file sharing facilities are available which assist the process of working in a multi-site organisation where each user is able to see at a glance the availability of other members of staff for meetings etc.

What MS Outlook looks like when you open it

When you first open MS Outlook, the screen will probably look like this:

Make it yours
Customize Outlook. Choose different color schemes and different backgrounds, and synchronize them with your other computers.

Search
You can search a folder, subfolders, even other mailboxes.

Manage message tasks in the Message List
Categorize, Flag, or Delete messages right where they live—in the Message List.

Backstage view
Click the **File** tab to open the Backstage view, where you add account and change settings.

Do more in the To-Do Bar
The To-Do Bar displays the date navigator, your appointments, people, and your task list.

Reply from the reading pane
Reply and Forward right from the reading pane. Write a reply in the reading pane, too.

Peek
See a quick view of your Calendar, People, and Tasks. Even see upcoming appointments.

People pane
See details about everyone in the **To**, **From**, or **Cc** lines for each message.

Customising MS Outlook

The window above shows the original view which will be shown when you first open MS Outlook. The window can be changed suit your own preferences. The options available within the **View** menu include:

- Message Preview
- Folder Pane
- Reading Pane
- To-Do Bar

The **VIEW** ribbon includes the following options:

- Message Preview** (circled in red)
- Flag: Start Date**
- Flag: Due Date**
- Size**
- Categories**
- Subject**
- Reverse Sort**
- Add Columns**
- Expand/Collapse**
- Folder Pane** (circled in red)
- Reading Pane** (circled in red)
- To-Do Bar** (circled in red)
- People Pane** (circled in red)

Message Preview

Allows you to preview the first one, two or three lines of text in a message in the main message window.

Folder Pane

- **Normal** - this shows the full folder view in the left hand side.
- **Minimized** – this shrinks the panel to a bar down the left hand side.
- **Off** – removes the panel altogether. Favourites - displays folders that have been chosen to appear in the favourites list.

Reading Pane

- **Bottom** - shows the reading pane at the bottom of the messages.
- **Right** – this shows the reading pane to the right of the messages.
- **Off** – removes the panel altogether.

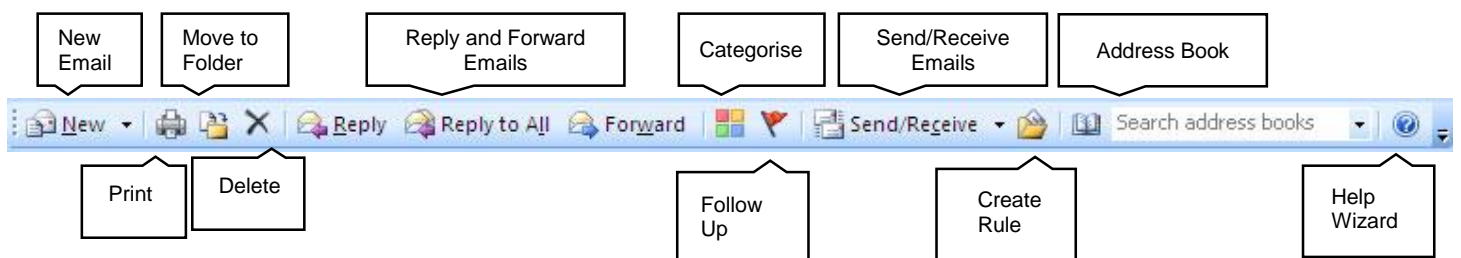
To-Do Bar

- **Calendar** - shows a list of calendar entries on the right hand side.
- **People** - shows a list of people saved as favourites on the right hand side.
- **Tasks** - shows a list of active tasks on the right hand side.
- **Off** – removes the panel altogether.

Standard Toolbar

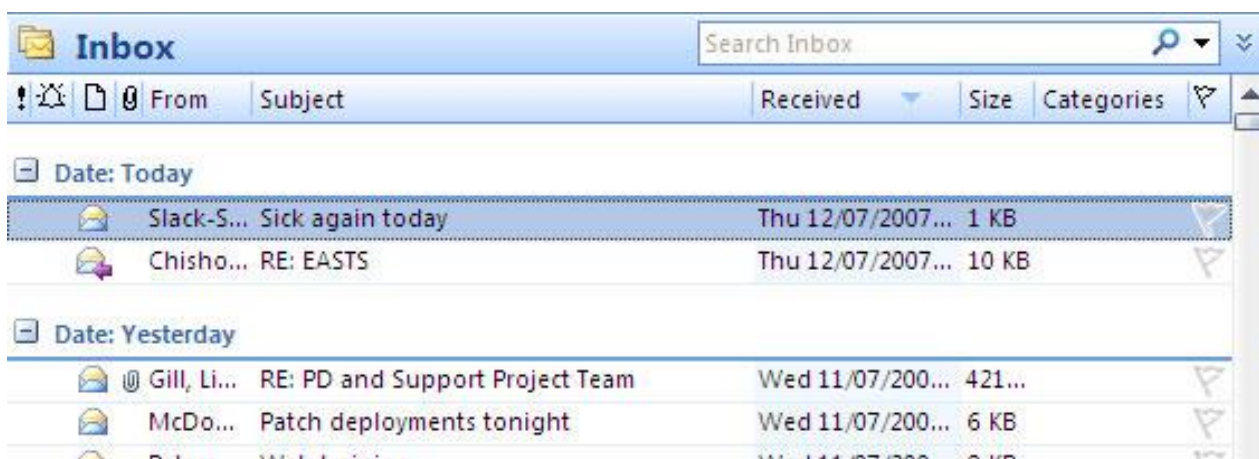
The toolbars contain buttons that enable you to perform common tasks without using the menus.

The Standard Toolbar is displayed automatically when you open MS Outlook. The Standard Toolbar displays mainly when you are within the Inbox:



Reading Emails

It is very easy to read your emails using MS Outlook. Your messages will appear in the **Message Window** as shown on the next page.



Your messages are usually sorted from the most recently received to the least recently received. There are a number of fields that will help you to identify and sort your messages:


- ! **Importance** tells you the priority of the message, it can be set to high or low
- 📎 **Icon** tells you whether the email has been read or whether it is an archived item
- 🚩 **Flag Status** tells you whether an item requires your attention. There are several options available for this.
- 🕒 **Reminder** sorts your mail by using the reminders.
- 📎 **Attachment** tells you whether the message contains an attachment
- **Received** tells you when the message was received by your email account
- **From** tells you who the message is from
- **Subject** tells you what the message is about
- **Categorize** you can sort your mail into categories and give it a colour to sort by

Note - If you click on any of these fields, your messages will be sorted according to what field you clicked on (e.g. if you click on attachment, messages will be sorted according to attachments).

You can **open** a message by double clicking the message you want to open in the message pane. The message will then open in a separate window.

When you have read your message you can close it by simply clicking on the **close** button on the top of the message window or you can reply to it, forward it, move it etc.

Deleting Email

If you wish to **Delete** your message you need to click once on it to **highlight** it and then either click on the **Delete**  button on the standard toolbar, or press the **Delete** key on the keyboard.

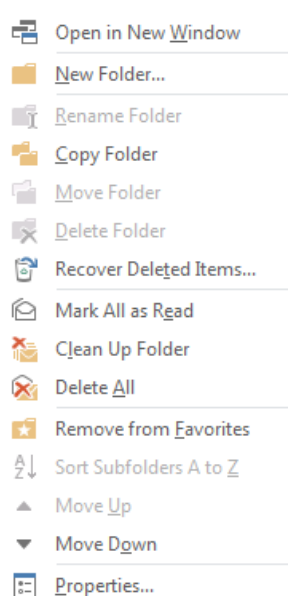
When you delete a message it will move to the deleted items folder where you can retrieve it later. To permanently delete an item from your **Inbox**, press the **Shift** and **Delete** key.

Creating Folders

To manage your email, it is best that you create different folders where you can store your emails. This makes them much easier to find rather than keeping them all within the **Inbox** itself.

To create a new folder:

1. Right click on the **Inbox** in the folder list
2. The following shortcut menu will display:



3. Click on **New Folder**. Type a name in the text box.

Moving Emails

Once you have created your folders, you can now organise your emails by moving them out of the **Inbox** and into the different folders you have created.

You can do this in a number of ways - the easiest is to click on the message you wish to move, **drag** it to the folder where you want to move it to (wait until the folder highlights) and drop it. The message will be moved from your **Inbox** to the folder you selected.

You can also use the **Move to Folder**



button on the standard toolbar.

To do this - click on the message you wish to move. Click on the **Move to Folder** button and you will have a list of some of your folders that you can move it to.

Replying to a Message

You may want to send a reply to the message you received. You can do this either while the message is open or from the **Inbox**.

You have two different options you can use when replying to a message, you can either **Reply** or **Reply to All**.

 **Reply** will send a message to the person who sent it to you.

 **Reply to All** will send the message to everyone listed in the original email

To reply to the message, just click on either of these options on the toolbar.

You will then see a window with the email address of the original sender already in the **To** field and you will be able to type in your reply in the message body area and send it back to the sender by clicking **send**.

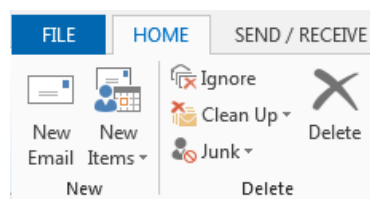
Forwarding a Message

Sometimes, you may want to send the message you received to someone else. To do this, click on the **Forward** button on the toolbar and a message window will appear with a blank address bar ready for you to put in the email address of the person to whom you wish to send it.

The original message will be attached and you can either type in some extra information if you need to or just click on **Send**.

Creating New Messages

When you wish to compose and send a message you will need to use the **New Email** button. When you click on this button, an untitled message window will display.

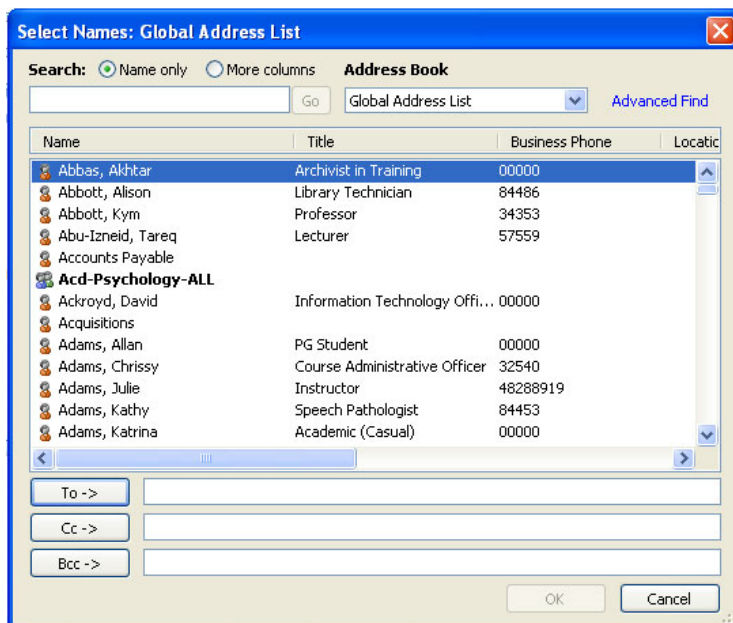


You will need to follow a few steps to successfully send a message. These are:

1. Enter the email address of the person to whom you are sending the message in the **To** field
2. Enter a subject for the message in the **Subject** field
3. Type in the details of your message into the message area
4. When you have finished composing your message, click on **Send**

Selecting Recipients

Instead of typing in an email address manually, you can select recipients from the address book. To do this, click on the **To** field and the **Select Names** dialog box will display.



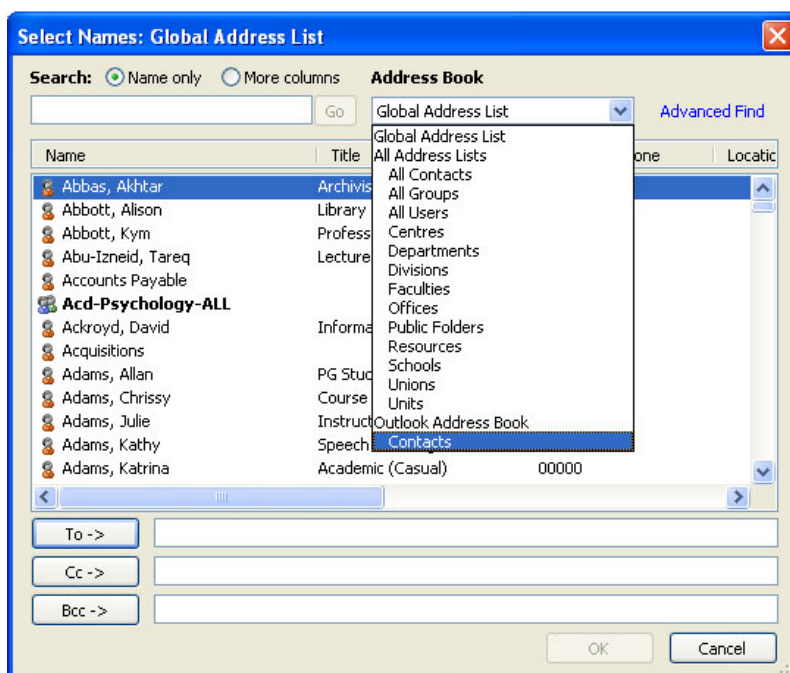
To find a staff member in the **Global Address List** you can either scroll through the alphabetical list or enter a few letters of the staff member's surname in the **Type Name or Select from List** field. This will automatically scroll through the list to the information you have entered.

When you have found the name of the person you are looking for, click once on the name to select it then click the **To**, **Carbon Copy (Cc)** or the **Blind Carbon Copy (Bcc)** button to add it to that field. If you then double click on the name in the **To**, **Cc** or **Bcc** field, you can find out more information about that person such as their Position Title, Department, phone extension etc.


If you wish to send the message to more than one person you just need to repeat the process. You can add as many recipients as you wish.

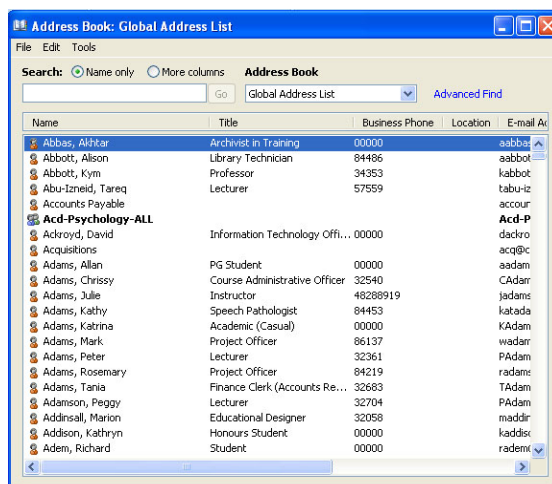
Contacts

You can use the **Select Names** dialog box to also find people that you have listed in your **Contacts** address book. To do this, select **Contacts** in the **Address Book** field and complete the same steps to find the names as you did with the **Global Address List**.



Using the Address Book

You can click on the **Address Book**  button on the **Standard toolbar** (see *Standard Toolbar section*) to find details about University Staff and your contacts without sending a message to them. When you click on the **Address Book** button, the **Address Book** dialog box will display.

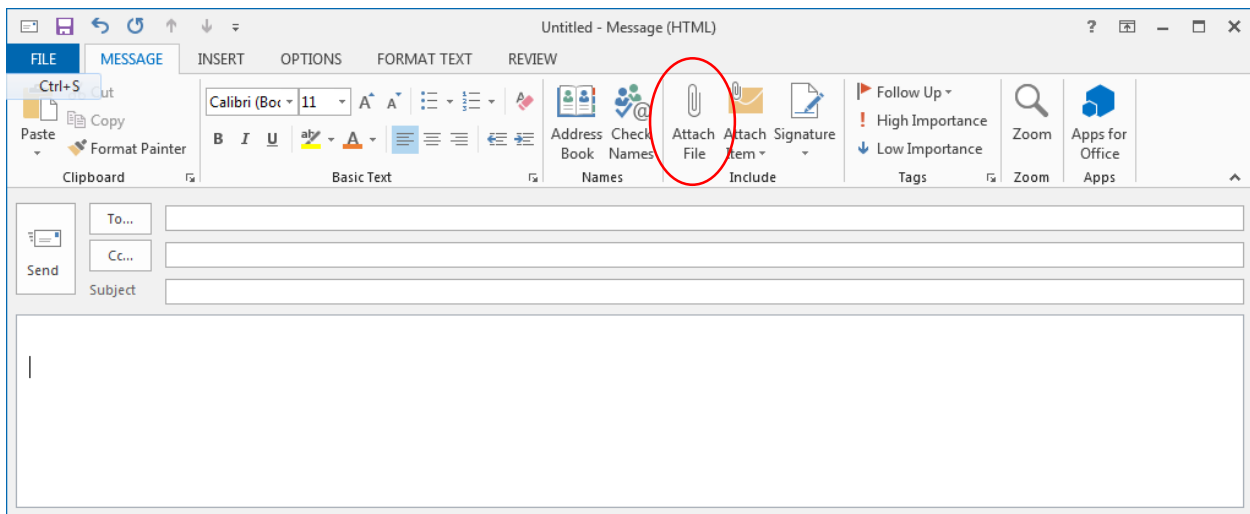


The **Address Book** works the same way as the **Select Names** dialog box. To search for people, follow the steps listed in the *Selecting Recipients section*. To see the **Properties** of the staff member, double click on their name in the address book.

Attachments

Adding Attachments

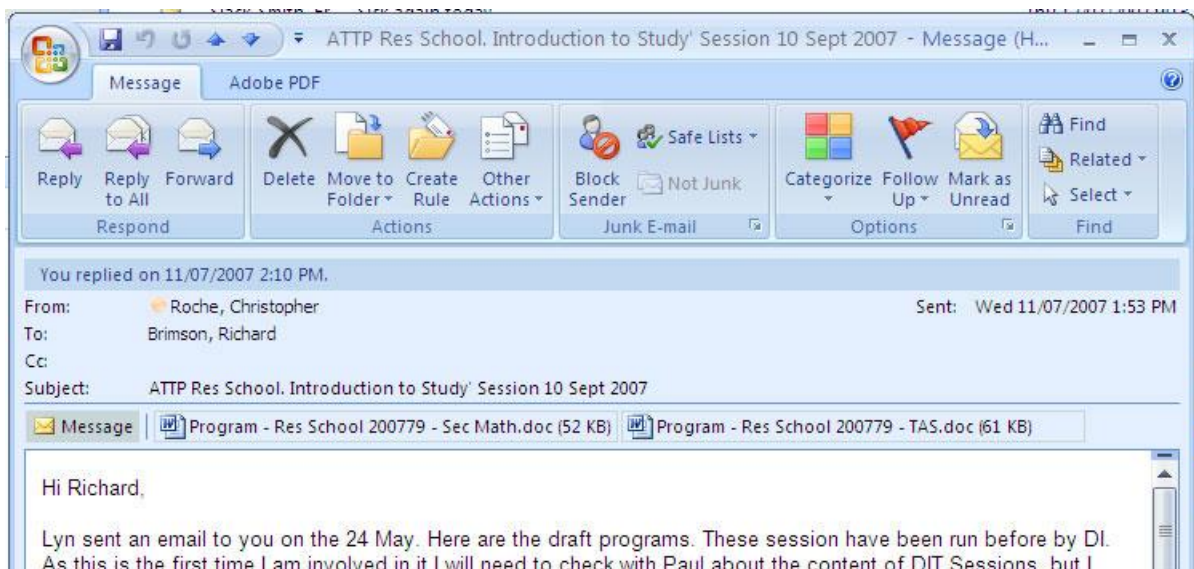
To add an attachment to a message you are creating, click on the **Attachment** button inside the Include section.



1. Click on the **Attach file** icon to navigate to where the file is saved
2. Select the file
3. Click on **Insert**
4. The file will now be located in the **Attached** field of your message.

Opening an Attachment

If someone has sent an attachment to you it will look something like this:



To open the attachment, double click on the name of the attachment. When you have opened it, you have the option to save it for further use. If you want to save the attachment, choose **Save As** and navigate to where you want to save the file.

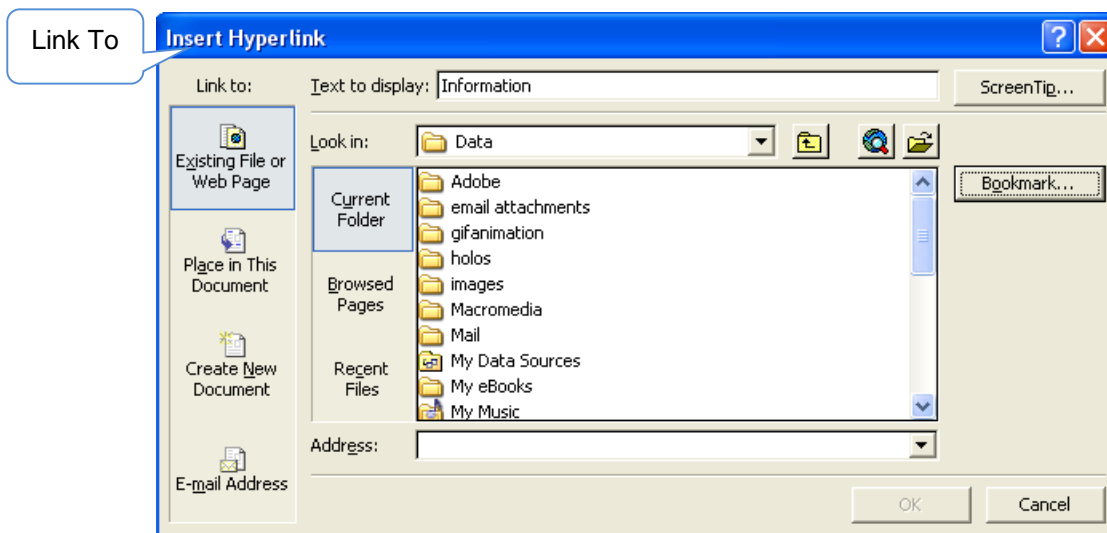
Hyperlinks

In MS Outlook, a hyperlink is a connection from your email message to a Web page, file or email address. The hyperlink itself can be text or an object such as a picture, graph or shape.

Hyperlinks become active when you open your email message.


To insert a hyperlink into your email message:

1. Highlight the text in your message where you wish to create the hyperlink
2. Click on the **Insert tab** and select **Hyperlink** (inside the Links section)
3. The **Insert Hyperlink** dialog box will display






You'll notice a number of options within this dialog box under the words **Link to:**.

These will determine the type of hyperlink you create and when you click on these different options, you will notice some changes to the **Insert Hyperlink** dialog box:

-  **Existing File or Web Page:** allows you to create a link to a web page. When you have selected this option, navigate to the file you want to link to in the **Look in:** field or type in the **URL address** in the **Address** field.

Note - You can add a hyperlink to a file on the **S:** drive using the **Existing File or Web page** option so that staff can automatically open the document from the link. Just remember that the person accessing it needs to have access to that part of the Shared drive.

-  **Place in this Document:** allows you to create a link to a place within the message. When you have selected this option, select the part of the message you want to link it to.
-  **Create New Document:** allows you to create a link to a new document that you create. When you have selected this option, type the name of the **new file** in, and select either **Edit the new document later** or **Edit the new document now**

-  **Email Address:** allows you to create a link to an email address. When you have selected this option, type in the **email address** in the ***E-mail address*** field and type the **subject of the email message** in the ***subject*** field.

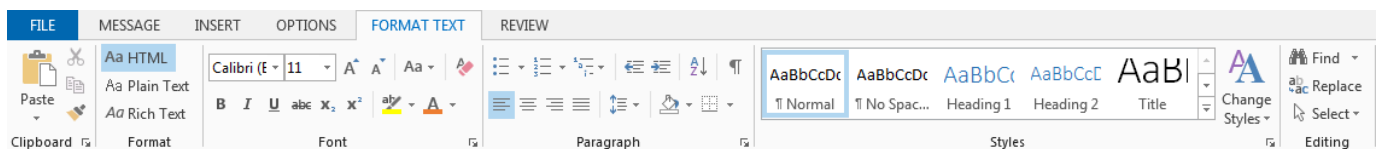
Signatures

A CSU [email signature template](#) has been created to ensure consistent application by staff. Signatures and disclaimers should be used at the end of all emails as they may be forwarded to external parties.

Formatting Text

You can change the appearance of text in your message by changing its attributes. This includes font, size, style, effects and colour.


The **Format Text** tab is the easiest way to change many attributes of text.



- **Styles** - Styles allow you to quickly format a document with a consistent and professional look.
- **Font Selection** - Click the arrow to the right of the font name box to view the list of fonts available. Scroll down to the font you want and select it by clicking on the name once with the mouse.
- **Font Size** - Click on the white part of the font size box to enter a value for the font size or click the arrow to the right of the box to view a list of font sizes available. Select a size by clicking on it once.
- **Bold, Italics and Underline** - Formats text to be bold, italicise and underlined
- **Text Alignment** - Text can be aligned to the left, center, or right side of the page or it can be justified across the page.
- **Numbered and Bulleted Lists** - Adds bullets or numbers to the paragraph
- **Increase/Decrease Indent** - Change the indentation of a paragraph in relation to the side of the page.
- **Outside Border** - Add a border around a text selection.
- **Highlight Colour** - Use this option to change the colour behind a text selection. The colour shown on the button is the last colour used. To select a different colour, click the arrow next to the image on the button.
- **Font Colour** - This option changes the colour of the text. The colour shown on the button is the last colour chosen. Click the arrow next to the button image to select another colour.

The Font Formatting Menu

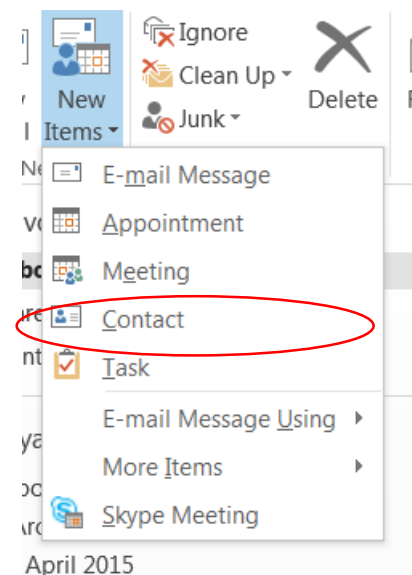
The FONT dialog box has further formatting options including many different styles of underlining, superscripting and subscripting:

1. Click the small diagonal arrow  in the lower-right corner of the Font group, then the Font dialog box will launch
2. Specify the changes you wish to make, then click **OK** to accept the changes.

Creating New Contacts

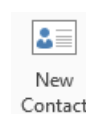
There are a number of ways you we can create a new entry in your Contacts address book:

1. Click on the **New Items button** in the navigation panel
2. Then click Contact



Alternatively, you can:

1. Click on **People** in the bottom menu and select the **New Contact button**



2. The **Untitled Contact** window appears and you are able to fill in the fields that you require. When you have finished entering the details, click on the **Save & Close button**.

You can also use the **Drag and Drop** option.

When you receive an email from someone who's contact details you would like to add - highlight their message in the **Inbox**, drag it to the **Contacts** folder in the **Folder List** and drop it.

You will then see the **Untitled Contact** dialog box (as above), but all the relevant information will be entered into the appropriate fields. Click on the **Save & Close button** to finish the entry. The message will still be available in the **Inbox** where it was originally located.