Table of Contents

ABOUT THIS COURSE 3

ABOUT THIS MANUAL 4

LESSON 1: GETTING STARTED WITH OUTLOOK 5

TOPIC 1A: IDENTIFY THE COMPONENTS OF THE OUTLOOK INTERFACE 6
Quick Access Toolbar 7
The Ribbon 7
The File Tab 7
Backstage View 7
Navigation Pane 8
New Email Message Interface 8

TOPIC 1B: READ AN EMAIL MESSAGE 9
Read an email message using the Reading Pane 9
Read an email message by double clicking 9

TOPIC 1C: REPLY TO AND FORWARD AN EMAIL MESSAGE 10
Reply to an Email Message 10
Forward an Email Message 10

TOPIC 1D: PRINT AN EMAIL MESSAGE 11
Print an Email Message 11

TOPIC 1E: DELETE AN EMAIL MESSAGE 12
Delete an Email Message 12

LESSON 2: COMPOSING EMAIL MESSAGES 13

TOPIC 2A: CREATE AN EMAIL MESSAGE 14
Create an Email Message 14

TOPIC 2B: FORMAT AN EMAIL MESSAGE 15
Format an Email Message 15

TOPIC 2C: CHECK GRAMMAR & SPELLING 16
To immediately correct a word you have miss-spelt 16
Check Grammar & Spelling 16
Check Grammar 17

TOPIC 2D: ATTACH A FILE 18
Include Tab 18
Attach a File 18

TOPIC 2E: ENHANCE AN EMAIL MESSAGE 19
Background 19
Enhance an Email Message with Page Colour 19
Enhance an Email Message with Stationery and Fonts 20

TOPIC 2F: SEND AN EMAIL MESSAGE 21
Send an Email Message 21
Send an Email from a specific account 21
Show Progress From the Server 22
Check on progress of your emails 22

LESSON 3: ORGANISING EMAIL MESSAGES 23

TOPIC 3A: MANAGE EMAIL MESSAGES 24
Sort Email Messages 24
Reverse Sort 24
Change the View 25

TOPIC 3B: MOVE EMAIL MESSAGES INTO FOLDERS 26
Move Email Messages into Folders using the Move button 26
Move Email Messages into Folders using drag and drop 27

TOPIC 3C: OPEN AND SAVE AN ATTACHMENT 28
Open an Attachment 28

Save an attachment 28

LESSON 4: MANAGING CONTACTS 29

TOPIC 4A: ADD A CONTACT 30
New Contacts Interface 30
Add a Contact 31
Add a Contact from the Same Company 31
Add a contact from their email message 31
TOPIC 4B: SORT AND FIND A CONTACT 32
Sort a Contact 32
Find a Contact 32
TOPIC 4C: FIND THE GEOGRAPHICAL LOCATION OF A CONTACT 33
Find the Geographical Location of a Contact 33
TOPIC 4D: UPDATE CONTACTS 34
Update Contacts 34

LESSON 5: SCHEDULING APPOINTMENTS 35

TOPIC 5A: EXPLORE THE OUTLOOK CALENDAR 36
Folder Tab 37
Send a Calendar through Email 37
Viewing Next and Previous Appointments 37
Navigation Pane in Calendar View 38
TOPIC 5B: SCHEDULE AN APPOINTMENT 39
Schedule an Appointment 39
TOPIC 5C: EDIT APPOINTMENTS 40
Edit Appointment 40

LESSON 6: MANAGING MEETINGS IN OUTLOOK 41

TOPIC 6A: SCHEDULE A MEETING 42
Schedule a Meeting 42
TOPIC 6B: REPLY TO A MEETING REQUEST 44
Reply to a Meeting Request 44
TOPIC 6C: TRACK AND UPDATE SCHEDULED MEETINGS 45
Track and Update Scheduled Meetings 45
Update Meeting Requests 45
Cancel Meeting Requests 45
TOPIC 6D: PRINT THE CALENDAR 46
Print the Calendar 46

LESSON 7: MANAGING TASKS AND NOTES 47

TOPIC 7A: CREATE A TASK 48
Home Tab 48
View Tab 48
Create a Task 48
TOPIC 7B: EDIT AND UPDATE A TASK 49
Edit a Task 49
Delete a task 49
TOPIC 7C: CREATE A NOTE 50
Create a Note 50
TOPIC 7D: EDIT A NOTE 51
Edit a Note 51
Delete a Note 51

About this Course

This course has been designed specifically for delegates with little or no experience of Outlook 2010 or who are migrating from an older version of Outlook. The objectives of this tailored course are the following:

- **Lesson 1: Getting Started with Outlook**
  - Topic 1A: Identify the Components of the Outlook Interface
  - Topic 1B: Read an Email Message
  - Topic 1C: Reply to and Forward an Email Message
  - Topic 1D: Print an Email Message
  - Topic 1E: Delete an Email Message
- **Lesson 2: Composing Messages**
  - Topic 2A: Create an Email Message
  - Topic 2B: Format a Message
  - Topic 2C: Check Spelling and Grammar
  - Topic 2D: Attach a File
  - Topic 2E: Enhance an Email Message
  - Topic 2F: Send an Email Message
- **Lesson 3: Organizing Messages**
  - Topic 3A: Manage Email Messages
  - Topic 3B: Move Email Messages into Folders
  - Topic 3C: Open and Save an Attachment
- **Lesson 4: Managing Contacts**
  - Topic 4A: Add a Contact
  - Topic 4B: Sort and Find Contacts
  - Topic 4C: Find the Geographical Location of a Contact
  - Topic 4D: Update Contacts
- **Lesson 5: Scheduling Appointments**
  - Topic 5A: Explore the Outlook Calendar
  - Topic 5B: Schedule an Appointment
  - Topic 5C: Edit Appointments
- **Lesson 6: Managing Meetings in Outlook**
  - Topic 6A: Schedule a Meeting
  - Topic 6B: Reply to a Meeting Request
  - Topic 6C: Track and Update Scheduled Meetings
  - Topic 6D: Print the Calendar
- **Lesson 7: Managing Tasks and Notes**
  - Topic 7A: Create a Task
  - Topic 7B: Edit and Update a Task
  - Topic 7C: Create a Note
  - Topic 7D: Edit a Note

Both the Course and the Manual will give you '*Hands-On'* experience which is vital to your learning process within this course.

About this Manual

Within the Manual's contents, we have for simplicity, kept terminology to a minimum. Any terminology we have used is fully explained in easy to understand statements.

The Manual has been designed to provide you with a useful tool both in the classroom environment and as a Reference Book once the course is over.

At the beginning of each topic you will see a list of Module Objectives that detail exactly what the topic contains.

Each topic is graphically represented at the top of each page with some diagrams and/or text. Often these are condensed items for the particular topic. Within each topic are *'snapshots'* of dialog boxes you will see on your own screen as you go through the course. This will assist you when you go back over any particular topic as to what you should be viewing on your screen at any given time.

Whilst working with the Manual, you will see that when you are asked to click on something on your screen, the text will be in **bold**. For example:

'Click the **Ok** button'

In this instance, we would like you to click on the button, which says **Ok**.

We are always interested in your comments on the Manual, Course and Tutor. We would ask, therefore, that you give your comments on your Course Evaluation Sheet at the end of the Course.

Please be aware that Elite Training & Consultancy Ltd, holds the copyright to this manual and should not be photocopied as a whole or in part.

Lesson 1: Getting Started with Outlook

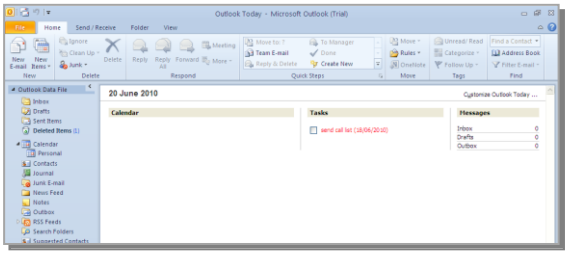
Learning Module Objectives

When you have completed this learning module you will have seen how to:

- Identify the Components of the Outlook Interface
- Read an Email Message
- Reply to and Forward an Email Message
- Print an Email Message
- Delete an Email Message

Identify the Components of the Outlook Interface

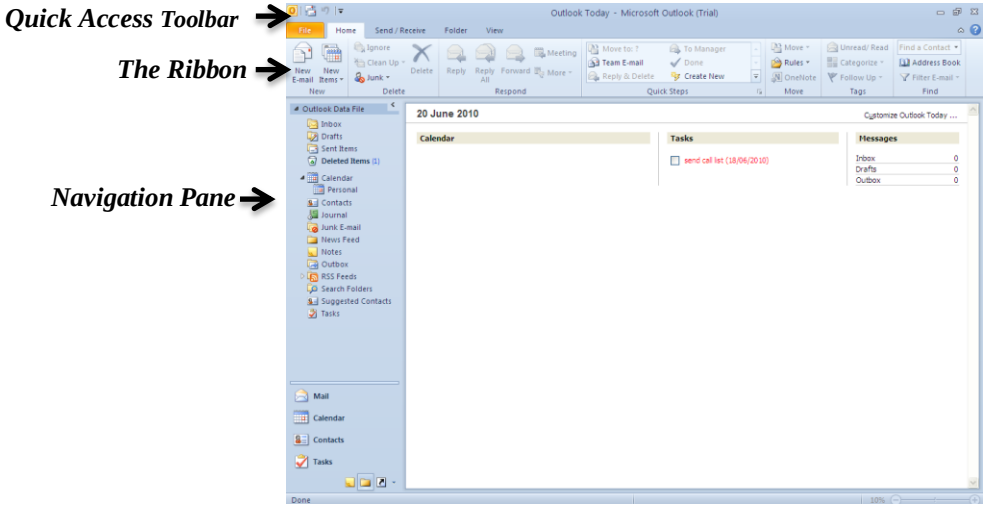
- **Outlook now has a new look with the Ribbon and Tabs**
- **All components of Outlook now have this new look**



Topic 1A: Identify the Components of the Outlook Interface

Background

With the launch of the brand new Microsoft Office 2010, the first noticeable feature is the new User Interface. Excel, Word, PowerPoint, Access and Outlook all now have a brand new look with Outlook now taking on the full Ribbon in the 2010 version.



It has been more than a decade since Microsoft has made such radical changes to the interface and what fantastic changes they are.

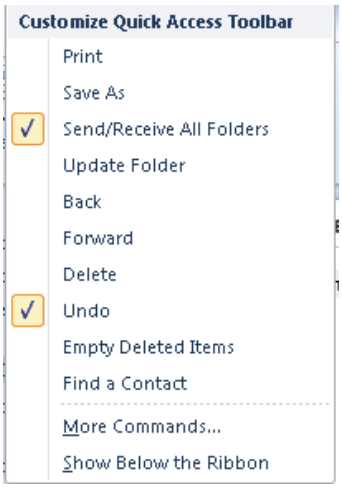
Being replaced by the Ribbon, Contextual Tabs and Galleries, users will now find it easier and faster to get the results they want.

If you have been using earlier versions of Outlook, give yourself some time to find out where everything is and don't get too frustrated if you can't find something. If this is the first time you have used Outlook, you will find that you will learn where everything is in no time at all.

In this section of the course we are going to look at different parts of the interface to help you to familiarise yourself with the main parts of the screen first. Then we will move onto more in depth topics like message formatting, views, etc.

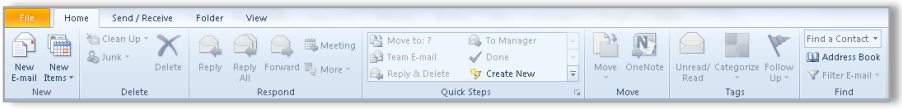
Quick Access Toolbar

At the top left (by default) of the Outlook window, the Quick Access Toolbar is displayed. The icons on this toolbar represent the most common buttons you will use. The default commands are **Save, Undo,** and **Print**. The toolbar can be displayed above or below the Ribbon. To do this, click the drop down arrow at the end of the icons and select **Customize Quick Access Toolbar below the Ribbon**.



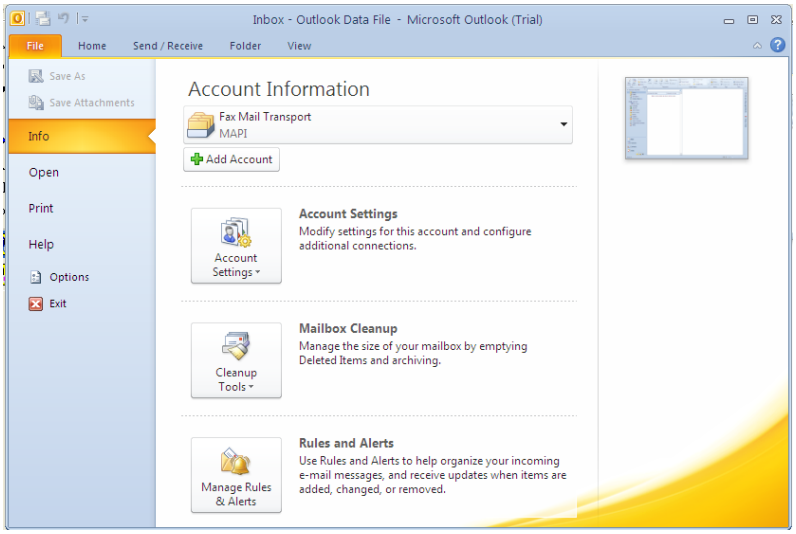
The Ribbon

By Default there are 5 tabs on the Ribbon in Outlook 2010 each with buttons within group to enable users to carry out specific options. **Home, Send/Receive, Folder** and **View**.



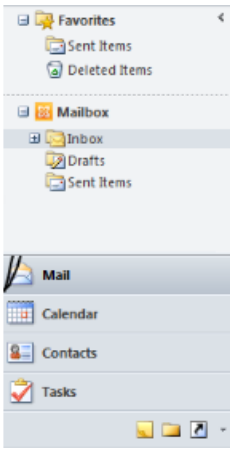
The File Tab Backstage View

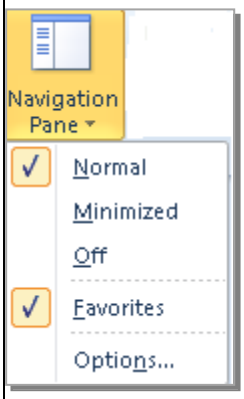
The **File Tab,** ***also known as the Backstage View*** is bright yellow so that it stands out from the rest of the tabs. This is the central location which holds the most common things you need to do with your document like New, Open, Save, Print, Publish and is split into three sections. We will go through each section to enable you to familiarise yourself with these important options.



Navigation Pane

The Navigation Pane is docked at the left hand side of the Outlook window. Here we can display **Favourites** and **Mailbox** along with other components of Outlook. The Navigation Pane can be turn on or off from the **View** tab and the **Navigation Pane** drop down arrow.



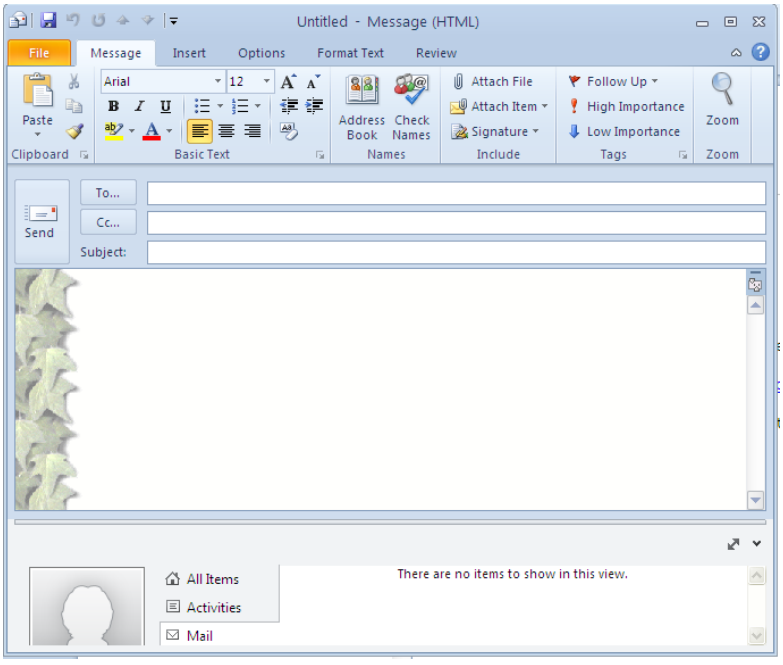


New Email Message Interface

The first thing you will notice is how much the screen has changed compared to the older versions of Outlook

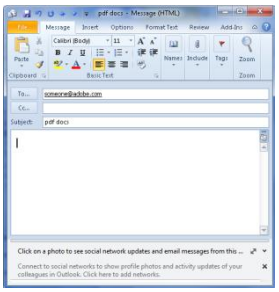
Gone are the Menus, Toolbars, Task Panes and dialog boxes. These features were good in their time where commands were limited but now that Microsoft Office can do so much more these features would not work so well.

Being replaced by the Backstage View (File tab), the Ribbon, Contextual Tabs and Galleries, users will now find it easier and faster to get the results they want.



Read an Email Message

- **The Inbox stores all incoming email messages**
- **Email messages which have not yet been read are displayed in the Inbox in bold**



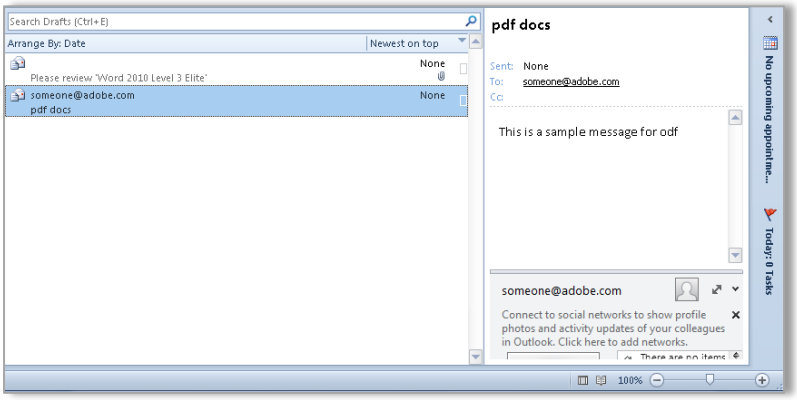
Topic 1B: Read an Email Message

Background

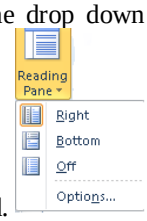
Messages in your Inbox can be read in a couple of ways. You can set up your Outlook to display a Reading Pane which can be docked at the right or bottom of the Outlook window. Alternatively, you can double click the new message to read it.

Read an email message using the Reading Pane

- If the Reading Pane is not displayed, click the **View** tab and the **Layout** group of buttons



- Click the drop down arrow on the **Reading Pane** button and select the option required.

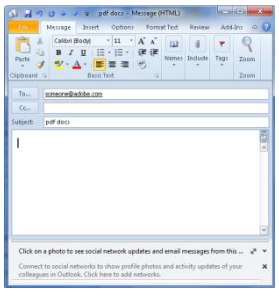


Read an email message by double clicking

- With the **Inbox** displayed, double click on the message you want to read.

Reply to and Forward an Email Message

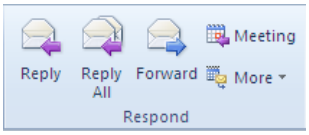
- **The Inbox stores all incoming email messages**
- **Email messages which have not yet been read are displayed in the Inbox in bold**



Topic 1C: Reply to and Forward an Email Message

Reply to an Email Message

- From the **Inbox** click once on the message you want to reply to
- From the **Home** tab and the **Respond** group of buttons, click the **Reply** button to start a reply to the sender
- Click the **Reply All** button to reply to everyone on the To and CC boxes.



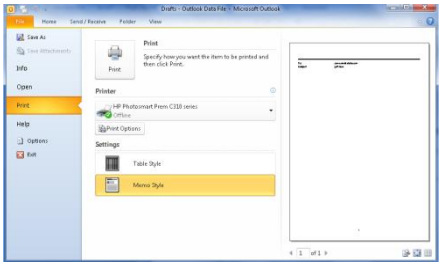
- Enter the required information then click the **Send** button

Forward an Email Message

- From the **Inbox** click once on the message you want to forward
- From the **Home** tab and the **Respond** group of buttons, click the **Forward** button
- Enter the recipient's email address in the **To** box
- Click **Send**.

Print an Email Message

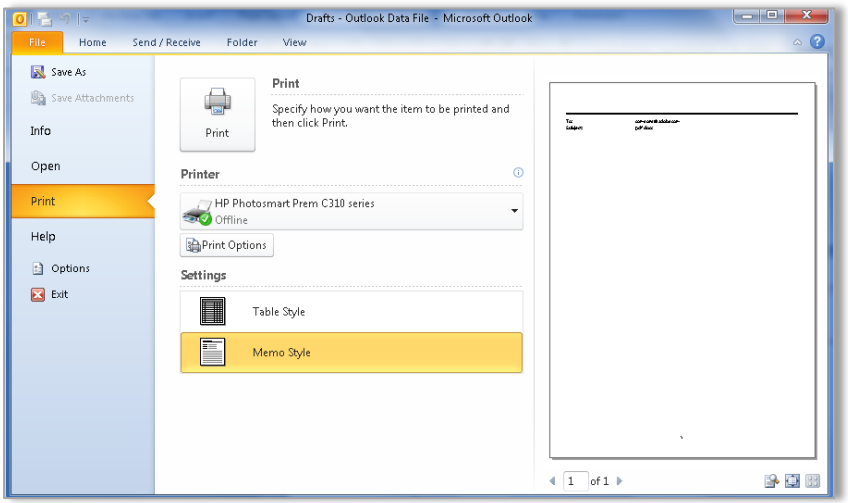
- **Emails should only be printed when absolutely necessary**
- **You can print an email while it is closed or open it to print it**



Topic 1D: Print an Email Message

Print an Email Message

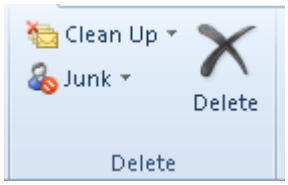
- Either single click the email you want to print or open the email by double clicking it
- From the **File tab** select **Print**.
- A preview of the email will be displayed with printing options.



- From the **Printer** section, select the printer from the drop down arrow.
- From the **Settings** section, select either **Table Style** or **Memo Style**
- Click the **Print** button.

Delete an Email Message

- **It is the responsibility of each user to empty emails from within Outlook at regular intervals**
- **This will keep your Outlook tidy**



Topic 1E: Delete an Email Message

Delete an Email Message

- The Inbox, Sent Items, Drafts and Deleted Items should be controlled by deleting unnecessary emails at regular intervals. Failure to do this will clog up your Outlook mailbox. This will ultimately result in your computer becoming slower and eventually you will not be able to send or receive emails at all.
- select the email you want to delete clicking it
- Either press the **Delete** key on the keyboard or click the **Delete** button on the **Home.**
- To delete multiple messages, click the first message then hold down the **Ctrl** key on the keyboard and select the other messages to be deleted. Then click the **Delete** button.
- If you are deleting email messages which are all next to each other, click the first message, then hold down the **Shift** key and click the last message.
- Outlook will select all the emails between the first and last message. Click the **Delete** button.

Lesson 2: Composing Email Messages

Learning Module Objectives

When you have completed this learning module you will have seen how to:

- Create an Email Message
- Format a Message
- Check Spelling and Grammar
- Attach a File
- Enhance an Email Message
- Send an Email Message

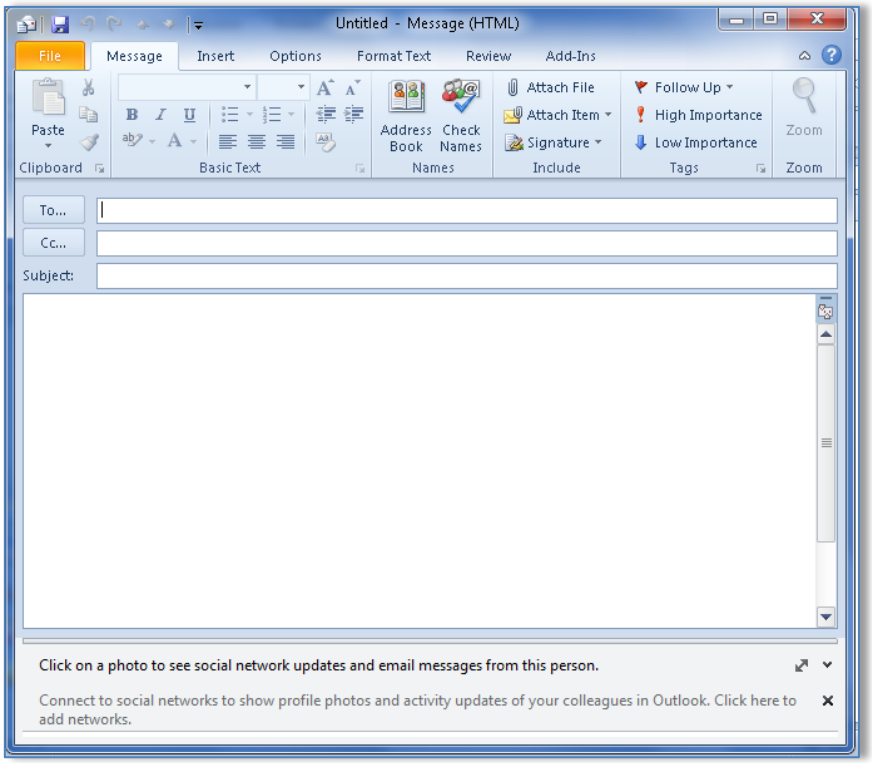
Create an Email Message

- **Creating a new email message is easy.**
- **Click the New E-mail button on the Home tab**

Topic 2A: Create an Email Message

Create an Email Message

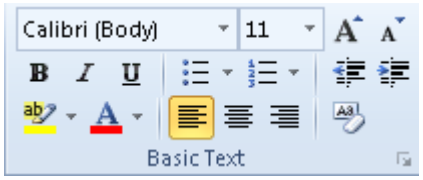
- From the **Home** tab and the **New** group of buttons, click the **New E-mail** button.
- A new email message window will appear like the one below.



- In the **To:** box, either type the email address of the recipient or click the **To:** button itself and select the person from the **Address Book**.
- In the **CC:** box, either type the email address of the recipient or click the **CC:** button itself and select the person from the **Address Book**.
- In the **Subject:** box, enter the subject of the email. It is considered bad practice not to enter a subject here.
- In the main white window enter your message.
- Click the **Send** button on the top left of the window.

Format an Email Message

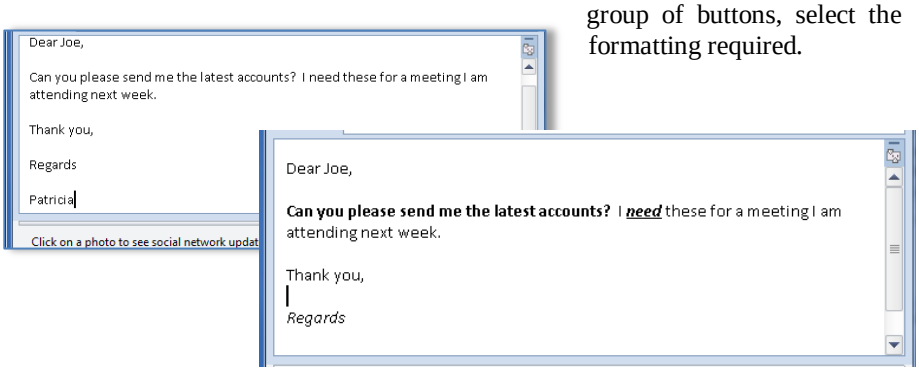
- **Formatting an email will enable you to make your message look entirely different and easier to read**
- **You can add Bold, Italics etc.**



Topic 2B: Format an Email Message

Format an Email Message

- You might have noticed that most of the buttons on the **Message** tab are greyed out until you enter text in the main window!
- Select the text to be formatted and from the **Message** tab and the **Basic Text** group of buttons, select the formatting required.

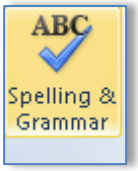


- If you want to add more formatting, you can do this using the **Format Text** tab.

- You will see here that the formatting is very similar to Word.
- Select the text to be formatted and select the formatting required.

Check Grammar & Spelling

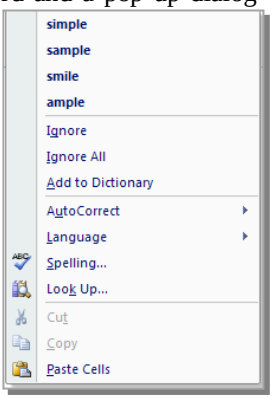
- **Just like a Word document, you should check your spelling and grammar to ensure these are correct**
- **You might not notice the mistake but others will**



Topic 2C: Check Grammar & Spelling

To immediately correct a word you have miss-spelt

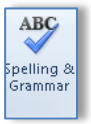
TIP: If you enter an incorrectly spelt word and wish to correct immediately, then as soon as the red underlining is displayed, right click on the word and a pop-up dialog box will be displayed suggesting alternative, correctly spelt words.



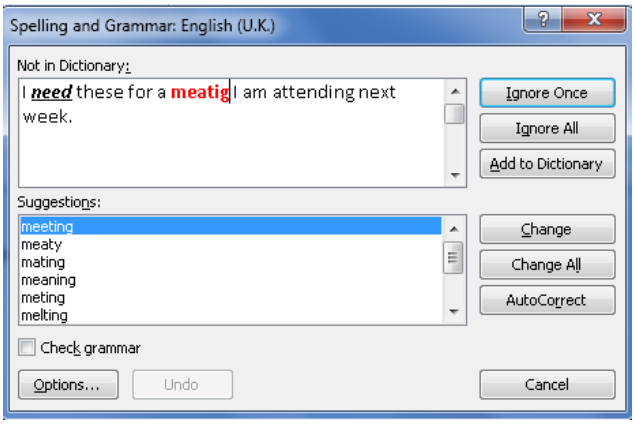
In the example below, "sample" was incorrectly entered as "smple"

Check Grammar & Spelling

- From within the message window, click the **Review** Tab



- From the **Proofing** tab, click the **Spelling & Grammar** button.
- The **Spelling & Grammar** dialog box will appear displaying a window like the one below.



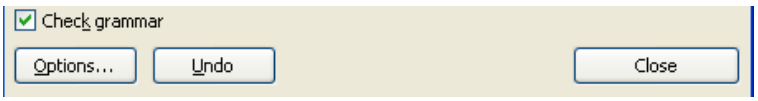
- Outlook will select the text to be changed
- A Suggestions box below the sample text will suggest new words
- To accept the change, click on the suggested word and then click the **Change** button
- To ignore the rule either click **Ignore Once** to ignore just this instance of the word or **Ignore Rule** to ignore all instances of the word

You can select one of the following actions: These options will differ depending on the type of error Word encounters.

Ignore	Leaves the word as it is.
Ignore All	Will not change any further occurrences of the word.
Add	Adds the word to the dictionary.
Change	Will change the word to the suggested word, or the word you type, in the Not In Dictionary text box.
Change All	Will change all further occurrences of the word to the suggested word, or the word you type in Not in Dictionary text box.
AutoCorrect	Enables the AutoCorrect feature for any further occurrences of the selected word.
Cancel	Exits the spell check.
Undo	Will undo the previous correction.
Suggestions	A list of suggested corrections from which you can choose a word to replace the currently selected word.
Options	Enables you to change the Spell Checking options.
Delete	Deletes a duplicated occurrence of a word, e.g. if you type "the the", selecting delete will remove one of them.
Next Sentence	Goes to the next sentence where there is a spelling mistake
Explain	Goes to Help to assist with the explanation of what could be wrong

Check Grammar

- Open the message
- From the **Review Tab** click the **Spelling & Grammar** button or press **F7**
- This will invoke the **Spelling and Grammar** dialog box



- Ensure the **Check** grammar box has a tick
- Grammatical errors will be displayed with a green underline

Attach a File

- **You can attach files like Excel, Word, PowerPoint etc. to your email**
- **The attachment must be on your computer, flash drive or CD/DVD**

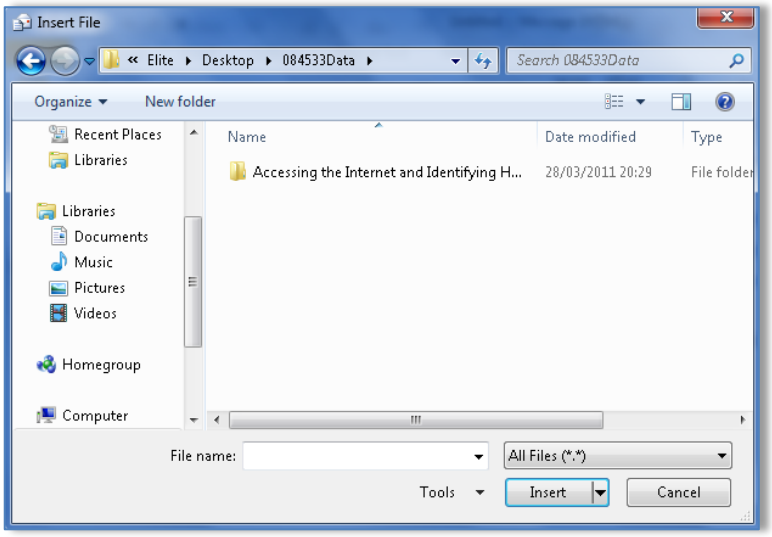
Topic 2D: Attach a File

Include Tab

Offers buttons to attach a file, attach Item like a Business Card, a Calendar, or a Signature.

Attach a File

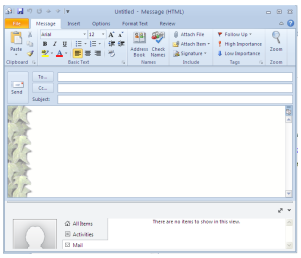
- Open the email message you want to attach the file to.
- From the **Message** tab and the **Include** group of buttons click the **Attach File** button.



- Naviagate to where the file resides and click the **Insert** button.

Enhance an Email Message

- **Email messages can be a bit bland therefore you can enhance the appearance of the message to make it look a bit more interesting**
- **Try a page colour or Stationery**



Topic 2E: Enhance an Email Message

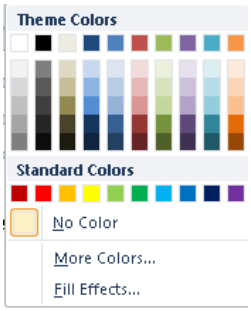
Background

Email messages can be a bit bland therefore you can enhance the appearance of the message to make it look a bit more interesting.

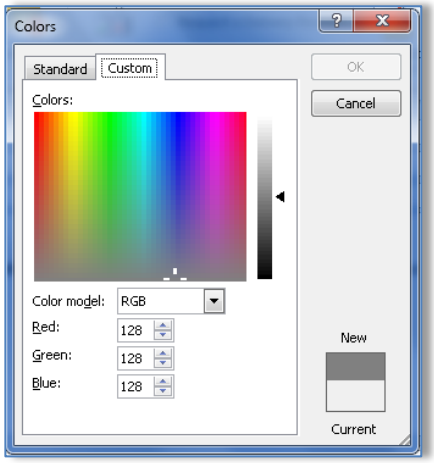
Enhance an Email Message with Page Colour

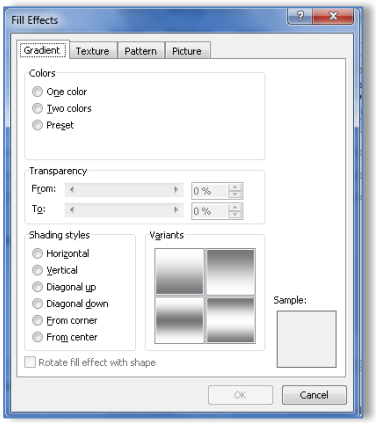
- Open the email message you want to add the page colour to
- From the **Options** tab and the **Themes** group click the **Page Color**

button drop down arrow.



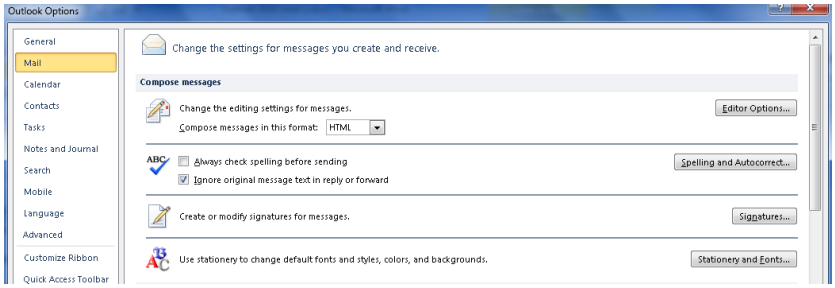
- Select **More Colors** to see a wide range of colours to select from
- Select **Fill Effects** to see the kind of fill you can add to the background of your message.



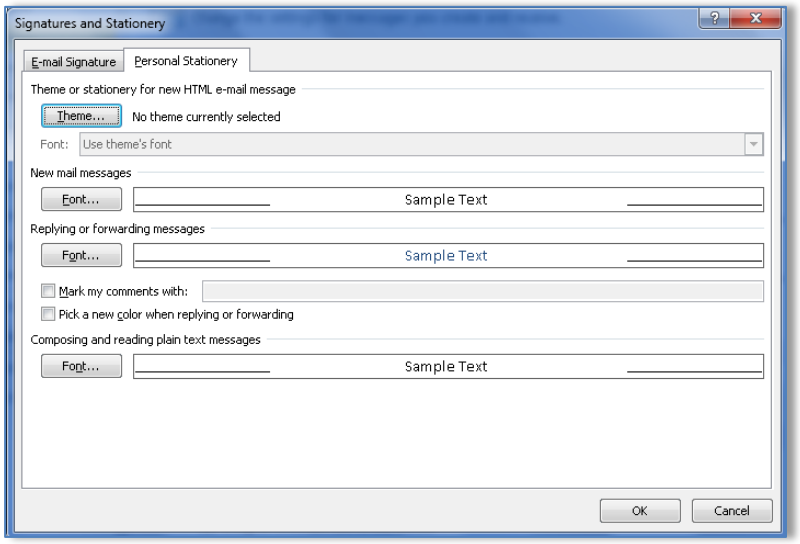


Enhance an Email Message with Stationery and Fonts

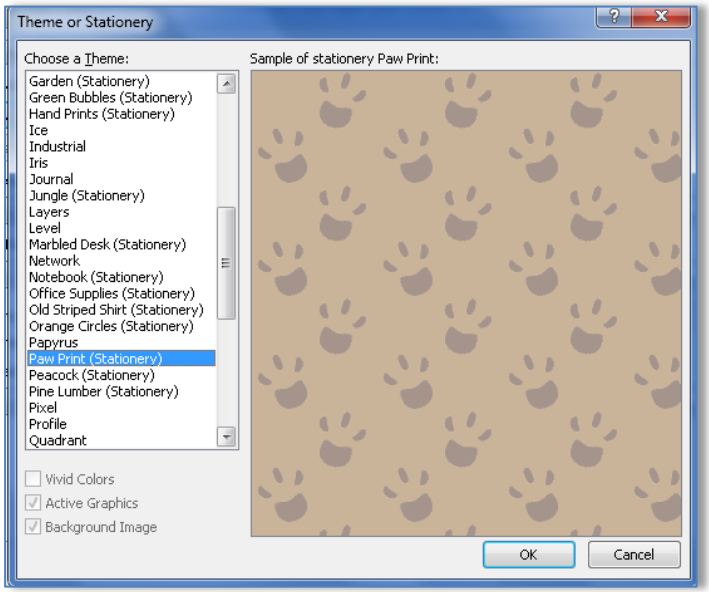
- Open the email message
- Click the **File** tab on the email message and select the **Mail** section



- Click the **Stationery and Font** button.



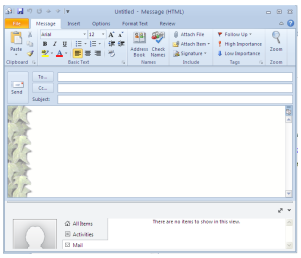
- Click the **Theme** button and a list of Themes and Stationery will be displayed.



- Select the Stationery or Theme required and click **OK**
- The Theme or Stationery will be present in your new emails giving a totally different look.

Send an Email Message

- **Emails can be sent by clicking the Send button within the email message**



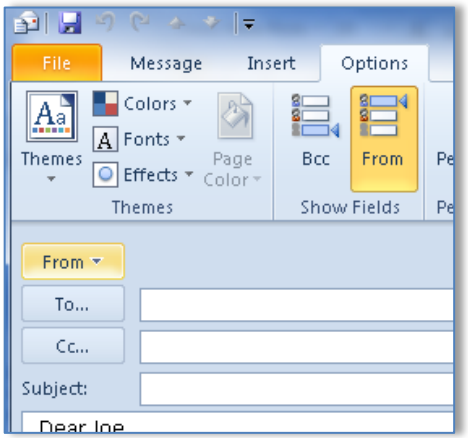
Topic 2F: Send an Email Message

Send an Email Message

- Enter the required information then click the **Send** button

Send an Email from a specific account

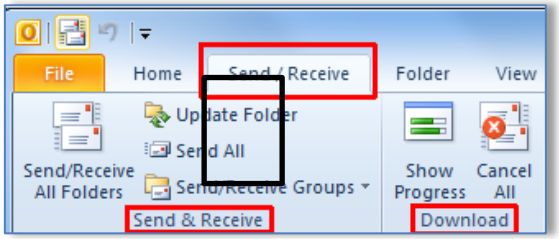
- If you have more than one email account, you can send a message from one of those accounts.
- From within the message window, click the **Options** tab
- From the **Show Fields** group, click on the **From** button.



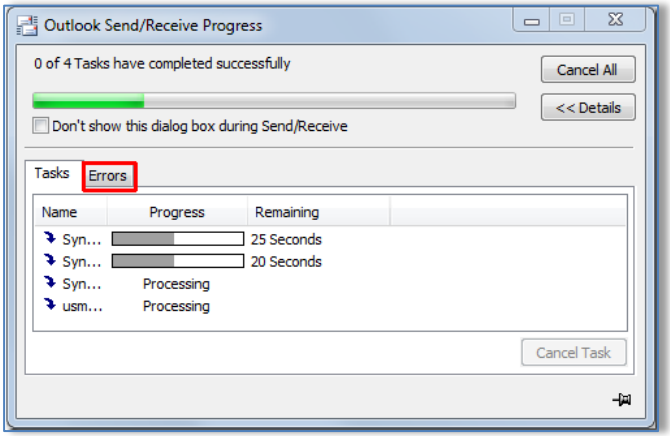
- The **From** option will be displayed about the **To:** box.
- Click the drop down arrow on the **From** button and select the required account.

Show Progress From the Server

- Click the **Send/Receive** tab and from within the **Download** group, click the **Show Progress** button.

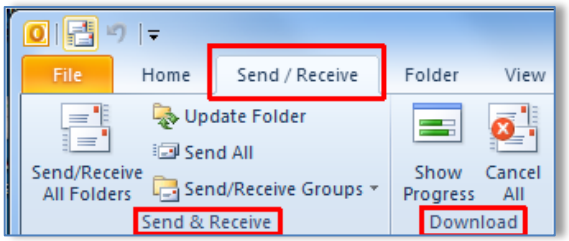


- The **Outlook Send/Receive Progress** dialog box will be displayed showing the progress.



Check on progress of your emails

- Click the **Send/Receive** tab and from within the **Send & Receive** group, click the **Send/Receive All Folders** button.



Lesson 3: Organising Email Messages

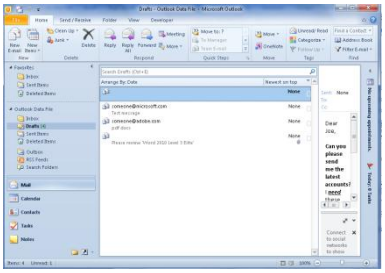
Learning Module Objectives

When you have completed this learning module you will have seen how to:

- Manage Email Messages
- Move Email Messages into Folders
- Open and Save an Attachment

Manage Email Messages

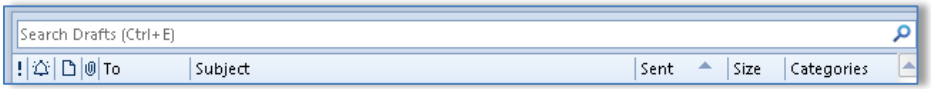
- **When you have lots of email messages in your Inbox Sent Items, Drafts and Deleted Items these need to be managed**
- **You can sort and filter, move or delete messages**



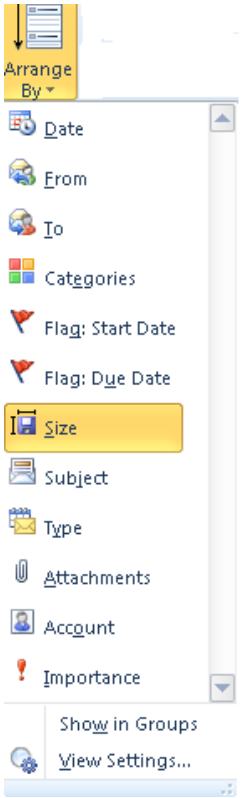
Topic 3A: Manage Email Messages

Sort Email Messages

- Click one of the sorting buttons at the top of each column like **the Subject, Sent, Size, Exclamation mark** etc. to sort by that column.

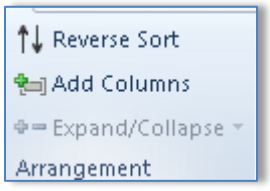


- Another way of sorting messages is with the **Arrange By** button on the **View** tab.
- Click the drop down arrow and select from one of the options on the list.



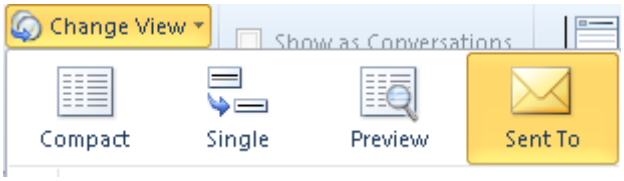
Reverse Sort

- Select the **View** tab and from the **Arrangement** group of buttons, click the **Reverse Sort** button.



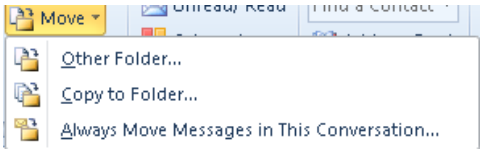
Change the View

- From the **View** tab and the **Current View** group of buttons, click the drop down arrow on the **Change View** button.
- Select one of the views offered.



Move Email Messages into Folders

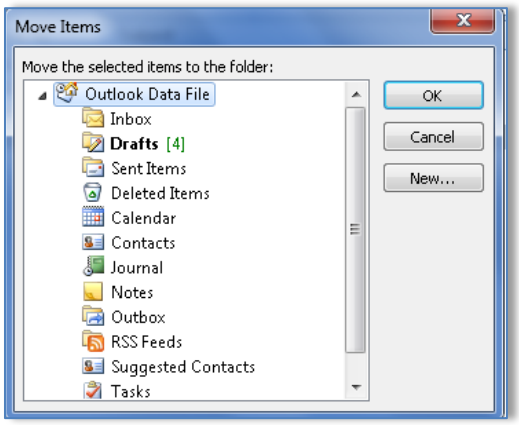
- **Emails can be moved from one folder to another by using the Move button or by dragging and dropping**



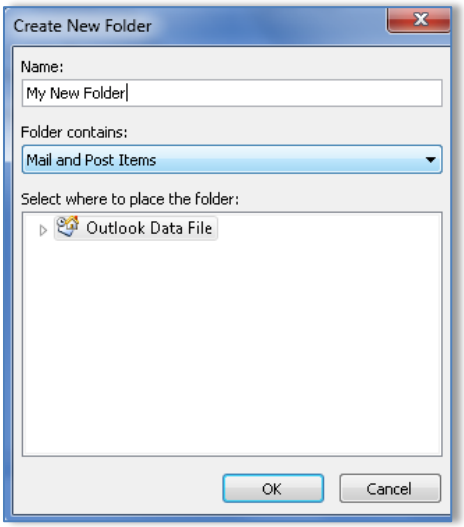
Topic 3B: Move Email Messages into Folders

Move Email Messages into Folders using the Move button

- Select the single email or multiple emails you want to move.
- From the **Home** tab and the **Move** group of buttons, click the **Move** button drop down arrow
- Select **Other Folder** to move the item to a folder in the **Move Items** window like the one below.



- Select the folder and click **OK**
- If you want to make a new folder first click the **New** button and the **Create New Folder** dialog box will be displayed.



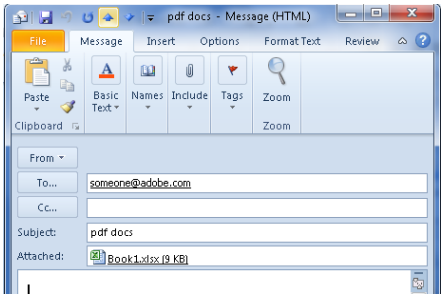
- In the **Name** box, enter a name for the folder and click **OK**
- Select the new folder and click **OK** to move the message.

Move Email Messages into Folders using drag and drop

- Select the single email or multiple emails to move
- Hold down the left mouse button and drag the emails to their new folder.

Open and Save an Attachment

- **When you receive an attachment in an email you will need to open it to read it.**
- **You should have the relevant software on your computer to enable you to do this**



Topic 3C: Open and Save an Attachment

Open an Attachment

- Open the email with the attachment
- You will see the attachment on the **Attachment** line below the **Subject** box
- Double click the attachment to open it.
- It should be noted that you should have the relevant software to open and read the attachment. For example, if you didn't have a copy of Excel then you would not be able to open an Excel worksheet attachment.

Save an attachment

- With the attachment open, click the **File** tab and select **Save As**
- Give the file a name and store it in the required folder.
- Close the file.
- Once you have saved the attachment you should delete it from Outlook by selecting the attachment on the Attachment line then press **Delete** on the keyboard.

Lesson 4: Managing Contacts

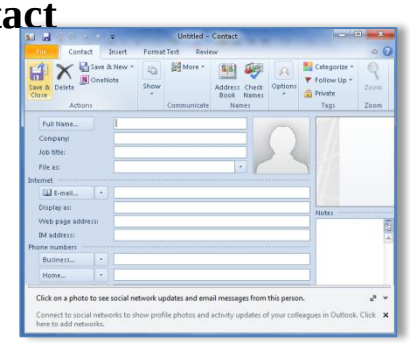
Learning Module Objectives

When you have completed this learning module you will have seen how to:

- Add a Contact
- Sort and Find Contacts
- Find the Geographical Location of a Contact
- Update Contacts

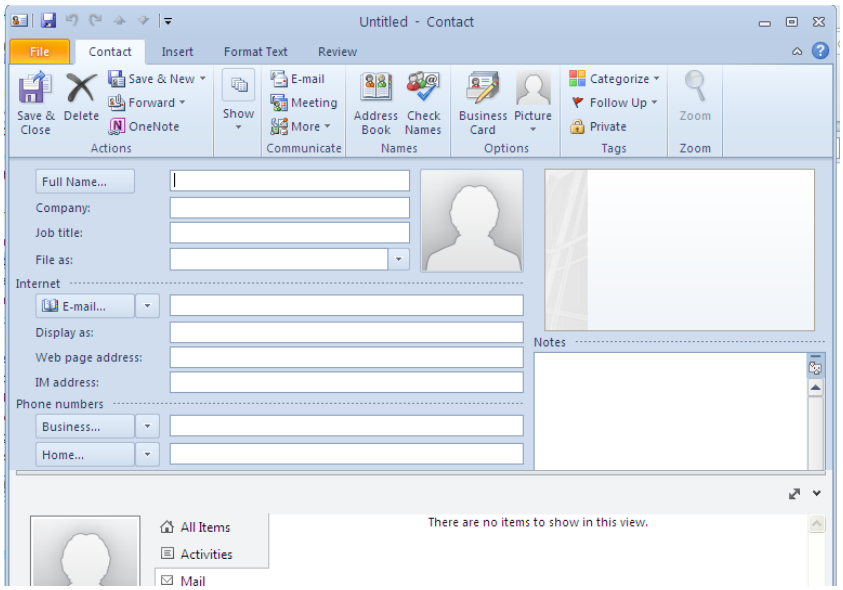
Add a Contact

- **Contacts in Outlook are very important**
- **They can be accessed by other software like Word when you add the Address Book icon to the Ribbon or Quick Access Toolbar**



Topic 4A: Add a Contact

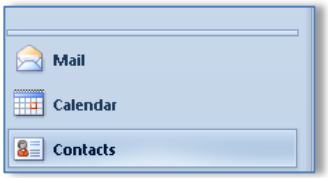
New Contacts Interface



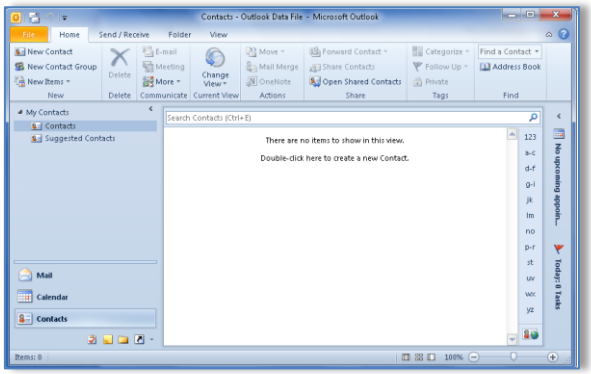
The new Interface within the Contact is similar to that of the new Message window with the Ribbon and the top of the window.

Add a Contact

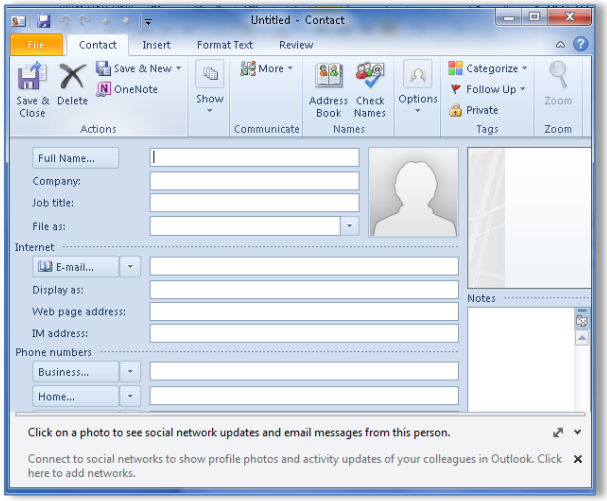
- Select **Contacts** from the bottom left of the Outlook window



- The Contacts window will be displayed.



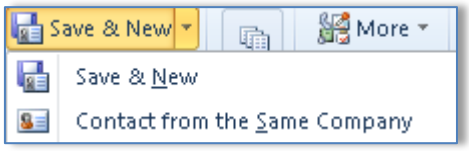
- From the **Home** tab and the **New** group of buttons, click the **New Contact** button
- A new contact window will be displayed.



- Enter as much information in the **Full Name**, **Company, Job Title** etc. sections
- Click **Save and Close**

Add a Contact from the Same Company

- Select **Contacts** from the bottom left of the Outlook window
- The Contacts window will be displayed.
- Enter the name and job title of the contact
- Click the **Save & New** button and select **Contact from the Same Company**

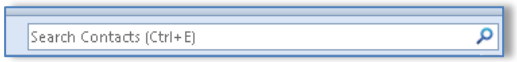


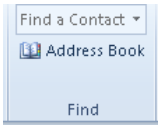
Add a contact from their email message

- Open the message the contact send you
- Right click their name and select **Add to Contacts**

Sort and Find a Contact

- **Finding Contacts is easy!**
- **You can search in the Search Contact box**
- **Or you can search in the Find a Contact box**

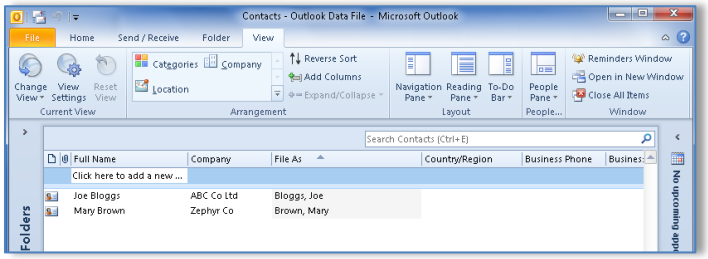




Topic 4B: Sort and Find a Contact

Sort a Contact

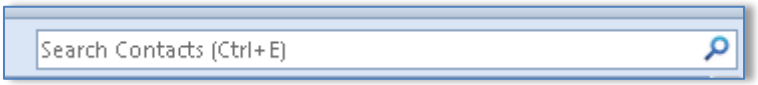
- The best way to sort contacts is to ensure the view of the contacts are in **Phone** or **List** view. The reason for this is that there are sorting field buttons at the top of each column similar to the email ones we looked at earlier.
- Change the view to Phone or List – From the **View** tab click the **Change View** button and select either **Phone** or **List** view. Below is Phone view.



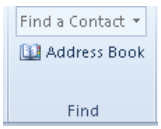
- Click one of the sorting buttons at the top of each column like **Full Name, Company, Business Phone** etc. to sort by that column.
- To reverse the sort, click on the **Reverse Sort** button.

Find a Contact

- Click in the **Search** panel at the top left of the window

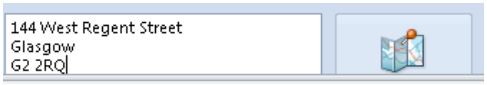


- Type the name of the contact you are looking for.
- Alternatively from the **Home** tab and the **Find** group click inside the **Find a Contact** box and type the name of the contact you are looking for.



Find the Geographical Location of a Contact

- **This option requires Internet access!**
- **Once the contact's address is entered into Outlook Contacts you can see a map of their location**

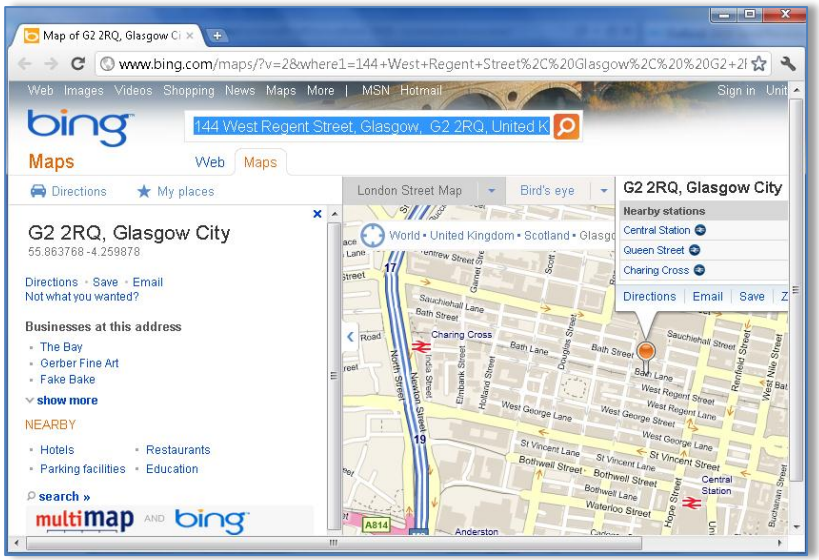


Topic 4C: Find the Geographical Location of a Contact

Find the Geographical Location of a Contact

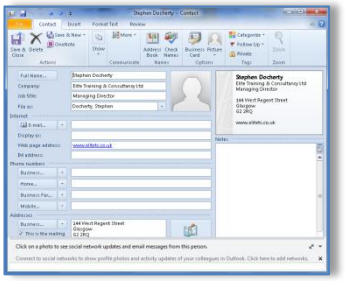
- Enter the contacts address into the Contacts information.

- Click the **View a map of this contacts address** button
- A window will be displayed showing the location on a map like the one below.



Update Contacts

- **There may be a time when some of your contact information changes**
- **Once you have a list of contacts within Outlook, keeping them updated is simple to do!**



Topic 4D: Update Contacts

Update Contacts

- Open the Contact information and make the changes
- Click **Save & Close**
- Alternatively when a contact sends an email message, right click the message and **Add to Outlook Contacts**
- If their information has changed, you will be asked if you want to update the information. Click **Yes**.

Lesson 5: Scheduling Appointments

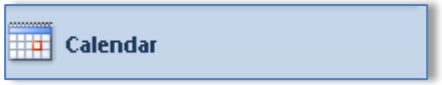
Learning Module Objectives

When you have completed this learning module you will have seen how to:

- Explore the Outlook Calendar
- Schedule an Appointment
- Edit Appointments

Explore the Outlook Calendar

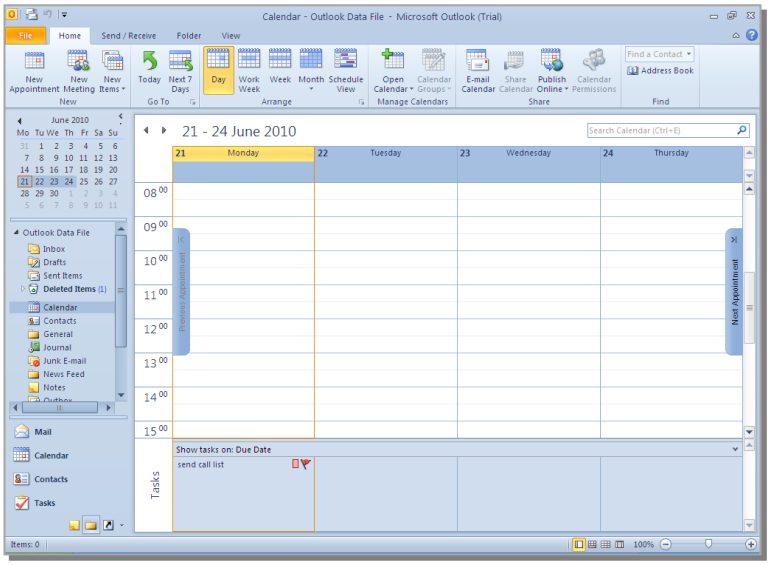
- **The Calendar within Outlook is easy to work with and navigate**
- **You can even email a calendar to someone else!**
- **You may also have more than one!**



Topic 5A: Explore the Outlook Calendar

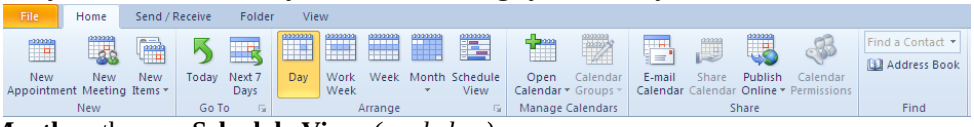
Background

The Calendar option overall has changed dramatically with the introduction of the Tabs. The look and feel is a bit more 3D but the functionality of the Calendar is the same. The new item here is that you can open a calendar from the Internet.

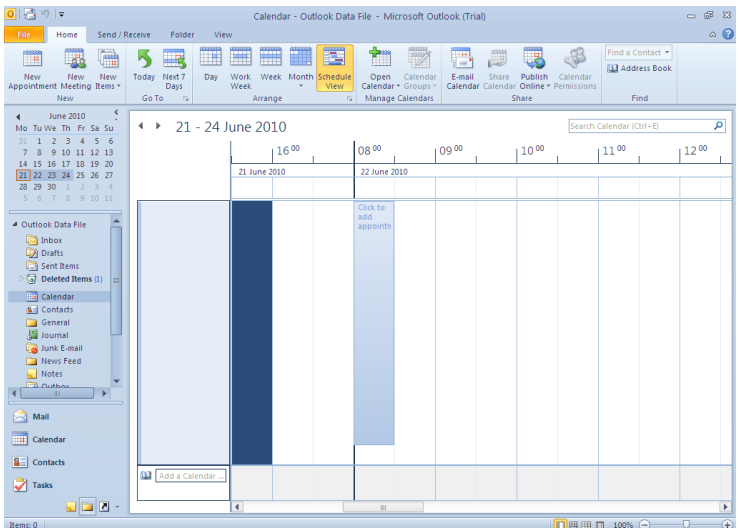


The Home Tab

Here you can set a **New Appointment, New Meeting,** or a **New Item. You can Go To Today** or see the **Next 7 days.** You can **Arrange** your view by **Work Week, Week**,



Month or the new **Schedule View**. *(see below).*

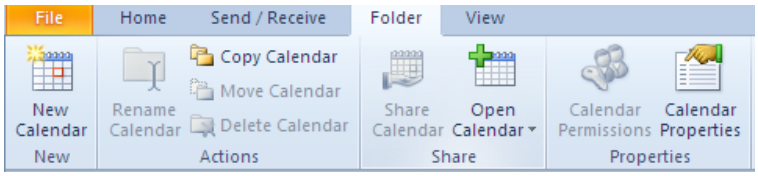


Under **Manage Calendars** you can open a New Calendar, a Calendar from the Internet or a Calendar group

Under **Share** you can **Email a Calendar, Share a Calendar, Publish a Calendar Online** or set **Calendar Permissions**.

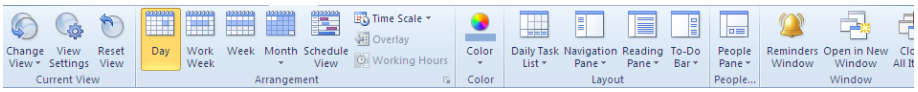
Folder Tab

Here you can create a new calendar, **Rename, Copy or delete a Calendar** and again set **Calendar Properties**.



View Tab

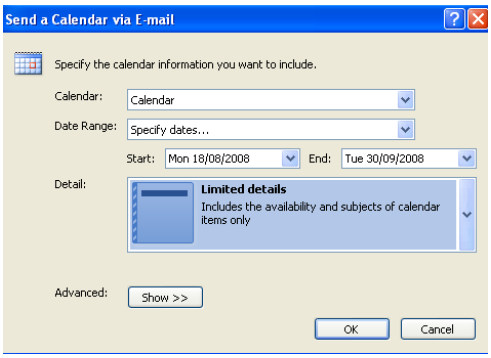
While some of the options here are the same as in the **Home** tab, you can see here you can categorize by colour or manipulate the layout and set reminders.



Send a Calendar through Email

This is a new option where you can email anyone your calendar. For this to work you must using Microsoft Exchange Server.

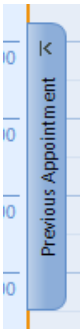
- Click on the options **Email Calendar** and then **Send a Calendar via E-mail**
- In the **Send a Calendar via E-mail** dialog box specify which calendar in the **Calendar** drop down
- In the **Date Range** select a range of dates
- In the **Detail** section select from **Full Details, Limited Details** or **Availability Only**



- Full Details will give all details about the calendar appointments, Limited Details will limit to subject and item only and Availability Only will only give whether Free, Busy, Tentative, or Out of the Office.
- Click **OK**

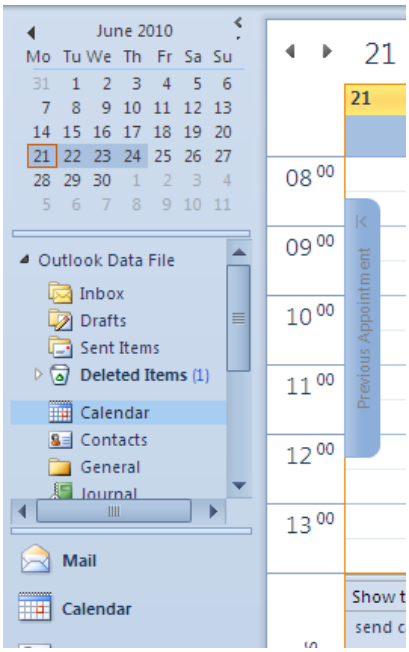
Viewing Next and Previous Appointments

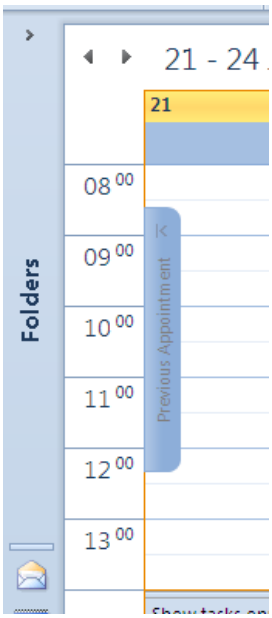
While you are in the One Day view, if you have any previous or appointments, you will see a small bar at the left of the Calendar. Just click the Bar to display your previous or next appointments.



Navigation Pane in Calendar View

You can expand or collapse the Navigation Pane in any view in Outlook. Just click the little **Shutter Bar** .





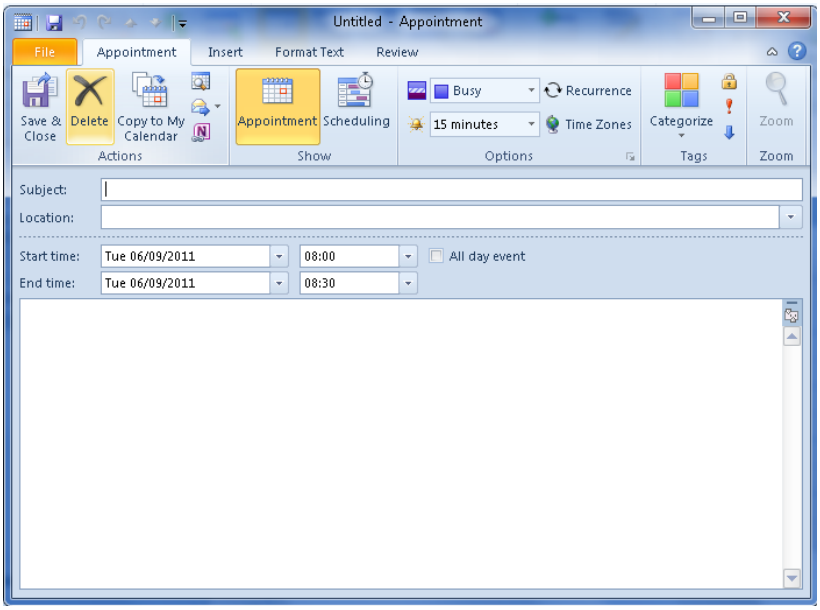
Schedule an Appointment

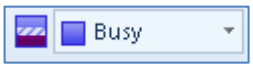
- **An Appointment in an Outlook calendar primarily only involves you.**
- **A Meeting involves you and others**

Topic 5B: Schedule an Appointment

Schedule an Appointment

- From within the calendar, click the **New Appointment** button
- The **New Appointment** window will be displayed for you to enter all your information

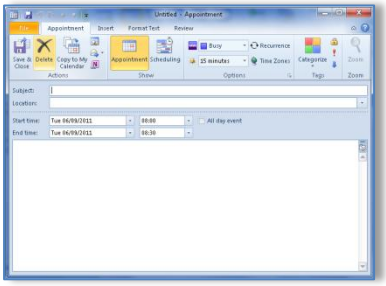


- Click in the **Subject** box and enter a subject for your appointment.
- Click in the **Location** box and enter the location of your appointment.
- In the **Start time** box enter a date and a time to start the appointment.
- In the **End time** box enter a date and a time to end the appointment.
- In the main box, enter any additional data you require about your appointment.
- If the appointment lasts all day, tick the **All day event** tick box.
- In the **options** group of buttons, click the **Show As** button 

and select one of the options i.e. **Busy**, **Out of the Office** etc.
- If the appointment is a private one, click the **Private** icon
- If the appointment happens regularly you can make it *recur* by clicking the **Recurrence** button. Enter the recurrence in the box and click **OK**.
- Click the **Save and Close** button.

Edit Appointments

- **If your appointments alter they can be edited**
- **If the appointment is a recurring appointment then you can alter just this one or all of them**



Topic 5C: Edit Appointments

Edit Appointment

- Double click the appointment you wish to amend
- Change the details and click **Save & Close**

Lesson 6: Managing Meetings in Outlook

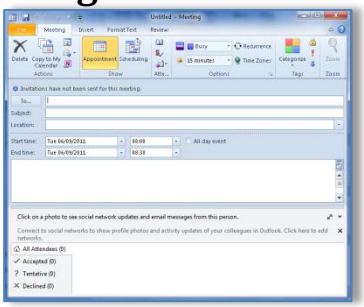
Learning Module Objectives

When you have completed this learning module you will have seen how to:

- Schedule a Meeting
- Reply to a Meeting Request
- Track and Update Scheduled Meetings
- Print the Calendar

Schedule a Meeting

- **An Appointment in an Outlook calendar primarily only involves you.**
- **A Meeting involves you and others**

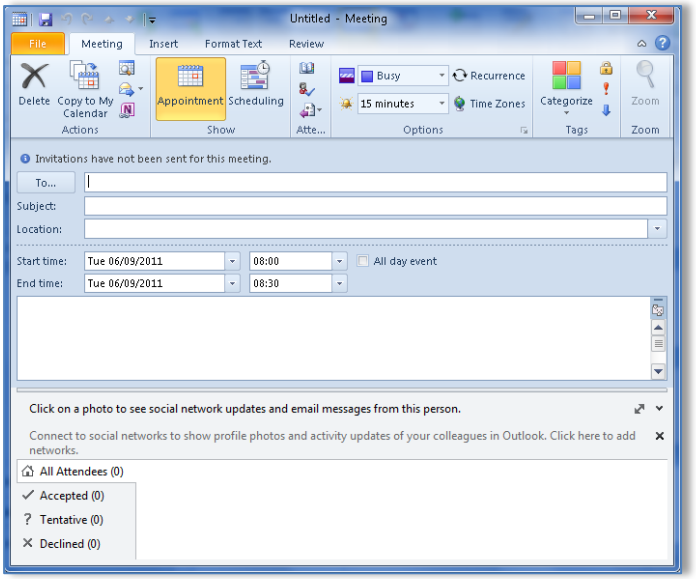


Topic 6A: Schedule a Meeting

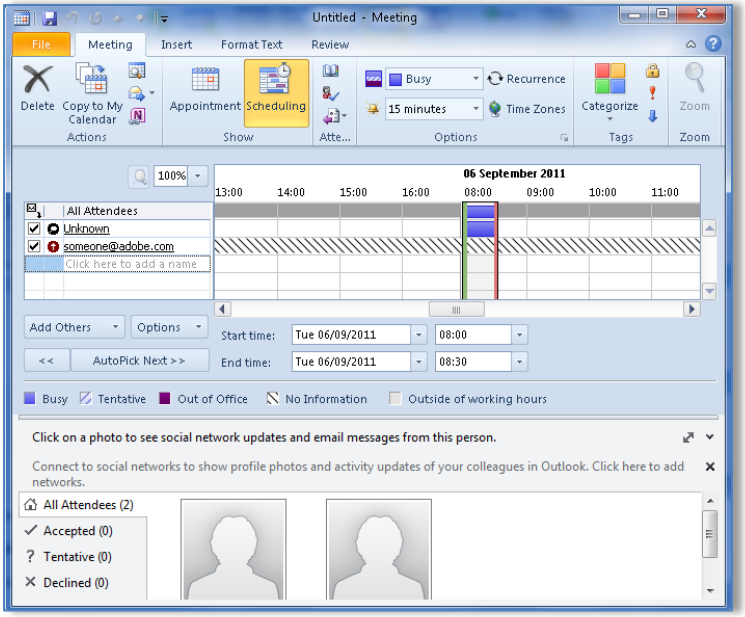
Schedule a Meeting

- Open the Calendar
- On the **Home** tab, click on the **New Meeting** button

- The **Untitled Meeting** dialog box will be displayed.



- In the **To:** box, enter the email address of the person you wish to attend the meeting.
- Complete the **Subject, Location, Start Time, End Time** information
- Click the **Schedule** button and the screen with change to show schedule information



- A list of the attendees is displayed at the right of the window.
- Between the green and red bar is the meeting time and you should be able to determine by looking at the coloured bar whether the person would be able to attend the meeting or not. If the colour of the bar is dark red then that would indicate they were not in the office on the date and date of the meeting.
- Click the **Appointment** button to switch back to enable you to send the invite.
- Click the **Send** button.

Reply to a Meeting Request

- **The request to attend a meeting will come as an email**
- **You must reply to the email to send information on whether you will be attending or not**

Topic 6B: Reply to a Meeting Request

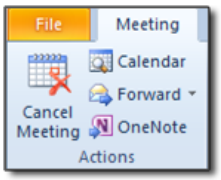
Reply to a Meeting Request

- The meeting request invites everyone who is on the **To** line in the original message as **Required Attendees**, and everyone on the **Cc** line as **Optional Attendees**.
- Do one of the following:
- In the message list, click the message, and then on the **Home** tab, in the **Respond** group, click **Meeting**.
- In an open message, on the **Message** tab, in the **Respond** group, click **Meeting.**

- Enter the location and start and end times as you do in any meeting request. You can also add or remove attendees, use **Scheduling Assistant** to find the best meeting time, or add attachments.
- The header and body of the original message are included in the body of the meeting request.
- Click **Send**.

Track and Update Scheduled Meetings

- **You can keep track of all your scheduled meetings**
- **You can also update or cancel the meeting request**

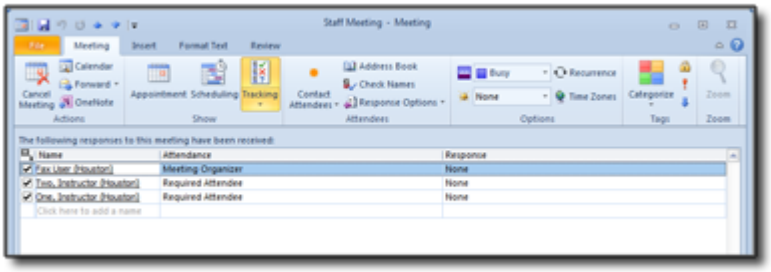


Topic 6C: Track and Update Scheduled Meetings

Track and Update Scheduled Meetings

Outlook adds the meeting to your calendar and sends a meeting request to the invited attendees' Inboxes. Outlook tracks and maintains attendees' responses.

- Click the **Calendar** folder and locate the scheduled meeting.
- Double-click the scheduled meeting.
- Click the **Show** group, click the **Tracking** button.

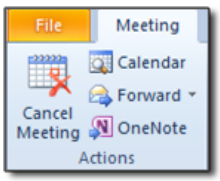


Update Meeting Requests

- Click the **Calendar** folder and locate the scheduled meeting.
- Double-click the scheduled meeting.
- Enter the information in the meeting request form.
- Click on the **Send Update** button.

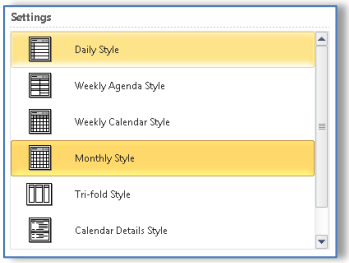
Cancel Meeting Requests

- Click the **Calendar** folder and locate the scheduled meeting.
- Double-click the scheduled meeting.
- In the **Actions** group, click the **Cancel Meeting** button.



Print the Calendar

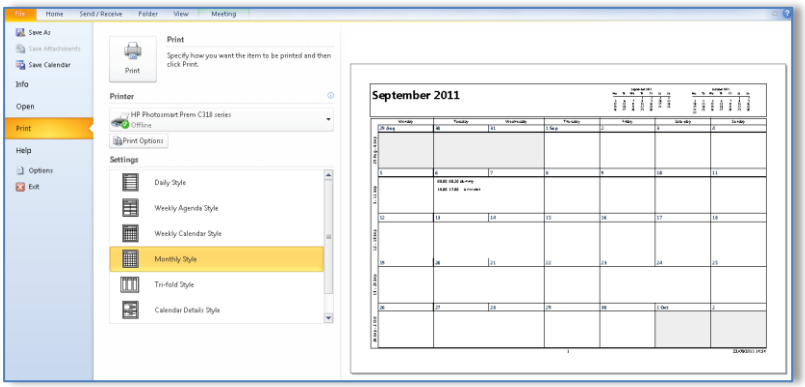
- **Printing the calendar is can be accomplished with just a couple of clicks of the mouse**
- **You can print in various different styles**



Topic 6D: Print the Calendar

Print the Calendar

- Click the **Calendar** folder and select the view required to print.
- From the **File** tab select **Print.**
- The Print Preview will be displayed like the one below.



- Select the style you wish.
- A preview of the calendar will be displayed on the right.
- Click the **Print** button

Lesson 7: Managing Tasks and Notes

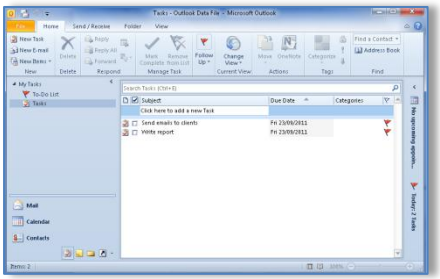
Learning Module Objectives

When you have completed this learning module you will have seen how to:

- Create a Task
- Edit and Update a Task
- Create a Note
- Edit a Note

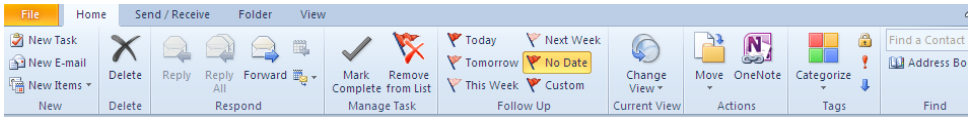
Create a Task

- **You can create a list of tasks in Outlook to assist with your time management**
- **Tasks which are overdue will be displayed as red**



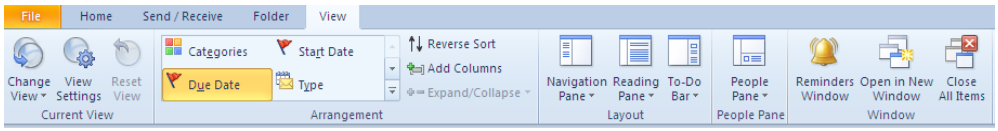
Topic 7A: Create a Task

Home Tab



This is where you will **create new tasks, email tasks, forward, mark complete, change view, categorise and prioritise.**

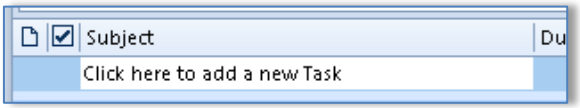
View Tab



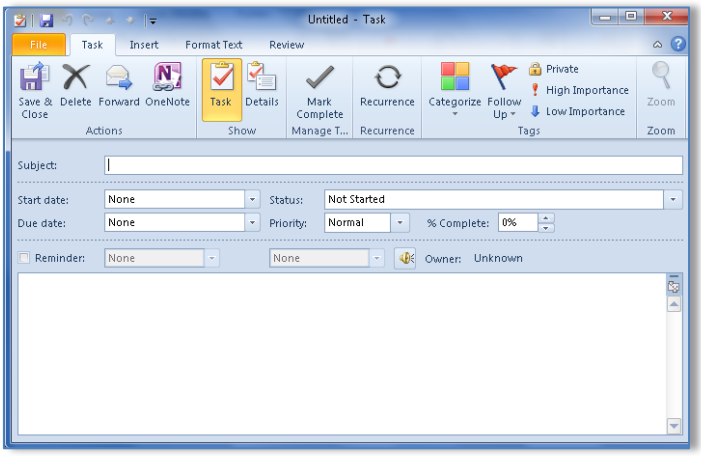
This is where you can set the View, adjust the **Navigation Pane, Reading Pane, To-Do Bar,** or manipulate **the People Pane.**

Create a Task

- Click on the **Task** folder at the bottom left of the Outlook window
- In the **Click here to add a new Task** section, enter the subject of the task and press **Enter** on the keyboard



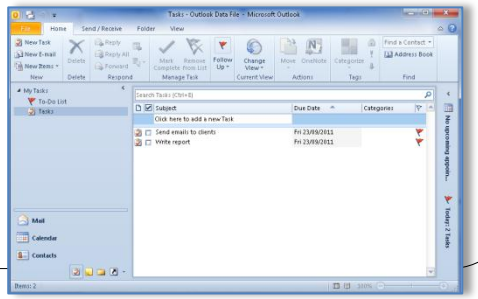
- Your task will be added to the list
- Alternatively you can click on the **New Task** button and enter a **Subject, Start Date, Due Date, Status, Priority**.



- In the main window, enter any data you require for the task
- Click **Save & Close**

Edit and Update a Task

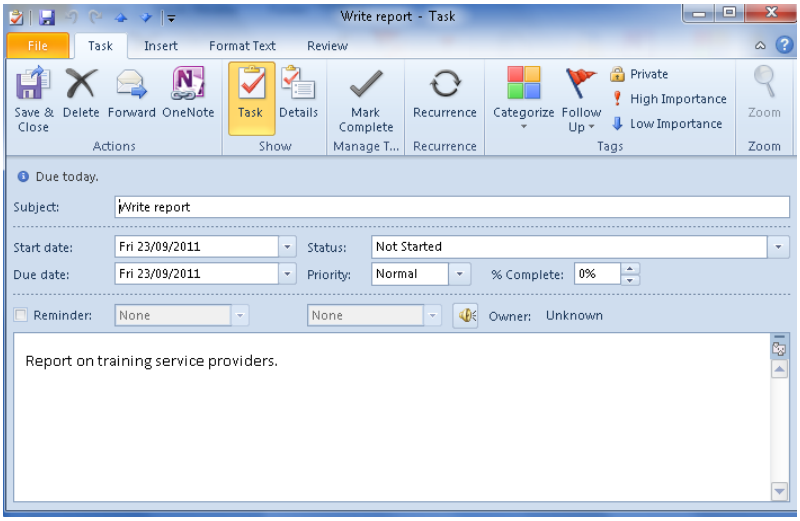
- **As your tasks change you will be required to edit them**
- **Once they have been completed you can mark them as complete and eventually delete them**



Topic 7B: Edit and Update a Task

Edit a Task

- Double click the task you want to update
- Make the relevant changes



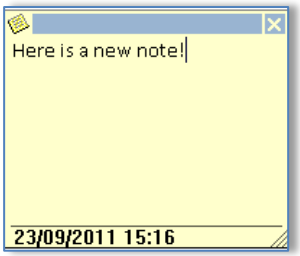
- If you want to change the status, click the **Status** drop down arrow and select from the list.
- If you want to mark the task complete click the **Mark Complete** button
- Click **Save & Close**

Delete a task

- Select the task and click the **Mark Complete** button

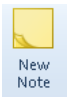
Create a Note

- **A Note in Outlook is the electronic form of the paper Post It Note!**
- **Useful to keep track of things you need to jot down**
- **They will stay in Outlook until deleted**



Topic 7C: Create a Note

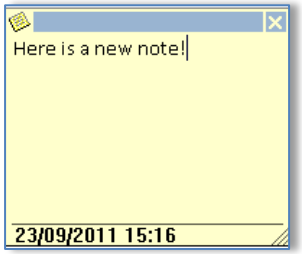
Create a Note

- Select the Notes folder and click the **New Note** button 

- A new note will be visible on screen with the date and time stamped on it
- Enter your text in the note and click the small cross at the top right of the note
- Add more notes as required.

Edit a Note

- **Notes can be edited at any time by simple double clicking the note and changing the data**
- **You can also colour code your notes!**



Topic 7D: Edit a Note

Edit a Note

- Select the Notes folder and double click the note you want to edit.
- Change the text as required then click the small cross at the top right of the note.

- To colour code your note select the note and click the **Categorize** button drop down arrow and select a colour.
-

Delete a Note

- Select the note and click the **Delete** button.