Outlook Essential Skills

We use Outlook on a daily basis at UHD to send and receive email to/from other staff and faculty members. In addition to emailing our contacts, Outlook enables us to manage a calendar and tasks with reminders. It is a robust office application with many components that can seem daunting. However, if we learn to customize just a few of the layout features and take advantage of some of the sorting and searching functions, we can use Outlook with greater proficiency and confidence.

In today’s lesson we’ll cover:
- Navigating Outlook tools
- Customizing your view
- Setting tasks and importance
- Searching and sorting messages
- Using the address book and adding contacts
- More...

Customizing your View and Layout

1. **Conditionally format fonts**
   1. Click the VIEW tab in the ribbon
   2. Click the View Settings button in the Current View Group
   3. Click the Conditional Formatting button in the Advanced View Settings dialogue.
   4. Click the kind of email messages you’d like to conditionally format.
   5. Click the Font button in the Conditional Formatting dialogue.
   6. Select the font formatting options you’d like, then click OK.

2. **Show email messages as conversations**
   1. Click the Show as Conversations checkbox in the Messages group.
   2. Click Conversation Settings to select how to organize conversations.
      - When conversations are expanded they will display by subject on top with individual messages in the email thread nested.
• **Preview message text in the inbox**

1. Click **Message Preview** in the **Arrangement** group.
2. Select how many lines of the message you’d like to preview when viewing the message from the inbox.

*Example:* two lines of message text previewed underneath the sender name and subject.

• **Sort messages in folders using Quick Steps**

1. Make sure to click the folder that you’d like to sort
   
   *Example:* Inbox

2. Click the **More** button in the lower right corner of the Quick Steps gallery in the **Arrange** group to expand all options.
3. Select an aspect by which you’d like to sort your messages.
   
   *Example:* Attachments

4. Messages in the inbox will rearrange, displaying those with file attachments first, from newest to oldest.

- File attachments are universally identified with a paper clip icon

• **Adjust the position of the Reading Pane**

The reading pane displays a full preview of the currently selected email message.

1. Click the **Reading Pane** button in the **Layout** group.
2. Select whether you’d like the Reading Pane positioned vertically to the **Right** of the inbox, or horizontally at the **Bottom** of the inbox.
   
   - Also choose to turn the reading pane Off
To-Do Bar
The To-Do Bar is a great way to display a preview of your calendar, upcoming appointments, and tasks arranged by importance without having to navigate out of the Mail view.

1. Click the To-Do Bar button in the Layout group.
2. Click the items that you’d like to see in the To-Do Bar.
   Example: Calendar and Tasks

Search Modifiers
At the top of the inbox you’ll find a search bar. Use the following modifiers to get more accurate results when you type your search keywords:

- **To:** Kerry, or madolek@uhd.edu
- **From:** Devin, or dabneyd@uhd.edu
- **Subject:** keywords in the subject line
- **Received:** = 7/17/14, or yesterday
- “exact word/phrase” (use quotation marks for an exact match)
- **AND** (show results containing red AND blue)
- **OR** (show results that are either red OR blue)
- **NOT** (show results that are red NOT blue)

Example: from: madolek@uhd.edu AND subject: “outlook training”

Use the By menu to select how you’d like search results to be organised.

Example: Date, newest to oldest

This has the same results as sorting using Quick Steps (page 2)
Simplify Sending and Receiving Email

- **Using Check Names and Address Book**
  When composing a new email, copying (Cc, Bcc) others in a reply, or forwarding an email, you'll need your desired recipient's email address. If your recipient is a UHD faculty or staff member, but you don't know his/her email address, use the **Names** group to search for that information.

- **Check Names**
  1. Start by clicking **New Email** in **New** group
     Or
     - Select the email you'd like to respond to and click **Reply, Reply All, or Forward** in the **Respond** group.
  2. In the email form, type part of the recipient’s first or last name in the **To…**, **Cc…**, or **Bcc…** fields.
  3. Click the **Check Names** button in the **Names** group.
  4. In the **Check Names** dialogue, find your recipient in the short list of search result.
  5. Click his/her name and click **OK.**
  6. The recipient’s Display Name will populate the field in the email form.

- **Address Book**
  1. In the email form, click the **Address Book** button in the **Names** group.
  2. In the **Select Names** dialogue, click the **More columns** radio if you’d like to search more than just last names.
  3. Type part of the recipient’s name in the search field.
  4. Click **Go.**
  5. Click the recipient from the search results.
  6. Click the **To->, Cc->, or Bcc->** buttons depending on how you’d like them to receive.
  7. Click **Ok.**
• Set Default Signatures
  1. Click the HOME tab
  2. Click the New Email button in the New group.
  3. A new Untitled Message window will open.
  4. Click the Signature button in Include group of the Message tab.
  5. Click Signatures... from the drop down.

  6. The Signatures and Stationary dialogue will open.
  7. Click the New button under the Select signatures to edit list box.
  8. Type a name in the New Signature dialogue.
     Example: Reply
  9. Click OK
 10. The signature will populate the list.
 11. Compose your signature in the Edit Signature field at the bottom.

  Note: In this example we’re creating a signature that will automatically appear for reply messages, not new messages. Therefore...
  12. Under Choose default signature on the left, click the Replies/forward combo box.
  13. Select the Reply signature that was created during steps 7-9.
  14. Click OK
  If this signature were for new messages, we would click the New messages combo box instead.

• Test reply signature
  1. Select any email in your inbox and click the Reply button in the Respond group.
  2. The subject will begin with RE:
  3. At the bottom of the message you should find the Reply signature that you created.
     • Note: Create and manually use other signatures by following steps 1-11, then click the Signature button and select them from the dropdown.
Set Importance and Flag for Follow Up

When sending an email, set the importance to High or Low by clicking one of the options in the Tags group.

1. To flag an email for Follow Up, click the Follow Up button.
2. Select an option from the drop down, or click Custom.
3. In the Custom dialogue, select Start and Due dates.
4. If you’d like, check the box to receive a Reminder.
5. Check the Flag for Recipients box if you’d also like your recipient to receive a reminder.
6. Click OK

Navigation Pane: 2010 vs. 2013

- Runs vertically in the lower left corner of the Folder Pane.
- Runs horizontally along the bottom left corner
- Not Adjustable
- Clicking the ellipsis expands more options
- Appears in this training document.

A simple way to add new contacts

1. From your Inbox (received mail), find an email from a sender you’d like added to your contacts.
2. Click and drag the email down to People in version 2013, or Contacts in version 2010.
3. A window will pop up with your new contact’s name and email information populated in the fields, but add any other details you’d like (phone numbers, office hours, etc.).
4. Click Save & Close.