

MS Outlook Presentation 21st May – Presentation Notes

Slide 2: Timeline & Background

- **1970's:** Mainframe-based "Office" / "Personal Organiser" applications available as 'Office Productivity' applications (corporate / business users only)
 - IBM "Profs"
 - ICL "Executive Action" aka "Exac"
 - Data General "Common Electronic Office" (on 'minicomputers')
- **1970's:** Development of 'microprocessor' technologies
- **Late 1970's:** Early versions of "Personal Computers" launched
 - Tandy TRS-80, Apple I, Commodore Pet...
 - Sinclair ZX81 and Spectrum, Amstrad, BBC Microcomputer, etc...)
- **1983:** IBM launches the IBM Personal Computer
- **1985:** November: Microsoft launches Windows 1.0 for IBM & IBM-compatible pc's
- **1991:** World Wide Web launched
- **1996:** Microsoft launches first version of MS Outlook

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How many of you remember the "Filofax" personal organiser?

- 'All the rage' in the 1980's

Think of Outlook as an electronic version of the Filofax, with a lot more besides

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Slide 3: What is Outlook?

- Outlook is most often used for Email
 - Based on (and incorporates) what was previously called 'Hotmail'
 - Has other "personal information manager" functions:
 - Tasks / Reminders
 - Contact management / Address book
 - Diary / Journal
 - Calendar
 - Note taking
 - Integrated with Skype for Instant Messaging / chat
 - Integrated with other MS Office products and web services

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Slide 4:

- **Office Online** is a FREE version of Office that you can use through a web browser, incorporating Outlook
- **Outlook Apps** are not free
 - Can be purchased as a standalone App or as part of MS Office 365
 - Yearly or monthly subscription
 - Latest release is Office 2019 (released Sept 2018)
 - Can be purchased as a single up-front cost BUT there are no upgrade options
- Outlook / Office apps are available across a range of platforms – PCs, MACs, tablets and phones (Windows, iOS and Android)
- **Outlook** and **Outlook Express** are completely different products
Outlook Express is not a "slimmed-down" version of Outlook

- I primarily use the web browser-based version
- I find it easier than the 'Desktop App'
- For the purposes of today we will take a look at both versions

NOTE: The browser version and Desktop App version are different and not all the facilities and functions are available in both.

Slide 5: Size / Storage Restrictions - How many emails can I keep?

- Every Microsoft account holder is allocated 50Gb of 'cloud' storage
 - Used for storing all emails and backups of your photos, your calendar, reminders, documents, etc
- You can keep as many emails (including attachments) as you want,
 - Subject to the overall 50Gb storage limit
- Each email limited to maximum 25Mb, including any attachments
 - Standard for most widely used email systems
- CAN be problems if more than 10 Attachments to one email

Slide 6: Advantages / Disadvantages of Browser version

- +ve: Simpler user interface (not so complicated)
- +ve: Access to other MS Office apps is simpler
- -ve: User MUST be connected to the internet to use it
- -ve: "Customization" is limited

Slide 7: Advantages / Disadvantages of Desktop App version

- +ve: Can be used when NOT connected to the internet
- +ve: Functionally rich
- +ve: Extensive 'customization' features
- -ve: Overly complex – Includes many features most users will never need
- -ve: Some inconsistencies between different versions / releases

Slide 8: Using Outlook with other email systems

- Can use Outlook as a 'single interface' to multiple email systems
 - Outlook/Hotmail; Yahoo; Gmail; others.....
- Up to **20** POP3 and IMAP email systems can be connected through a single Outlook mailbox
 - Subject to certain restrictions

Slide 9: Desktop App

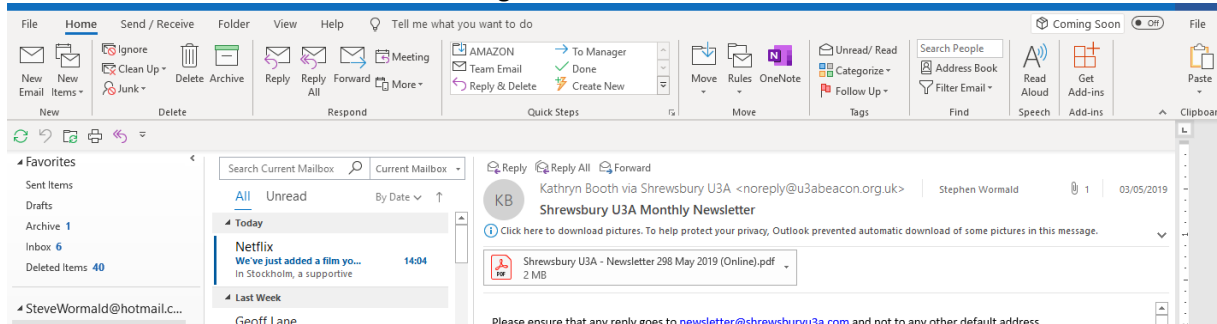
DEMONSTRATION

Outlook Desktop App – Start-up Options

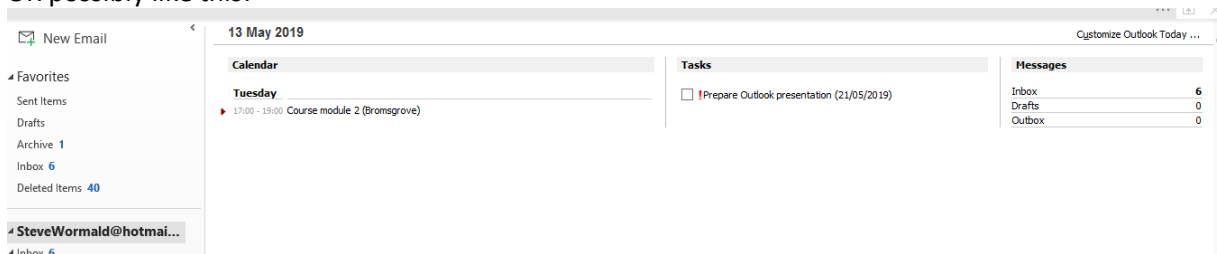
Many people opt to allow Outlook to load automatically when Windows loads. This can considerably slow down the Windows start-up process.

I choose instead to load it as and when I need it. To do this, click the Windows icon (bottom left of your Home Screen). Scroll down your list of Apps and click on 'Outlook' (it is listed under 'O')

When Outlook loads it will look something like this:



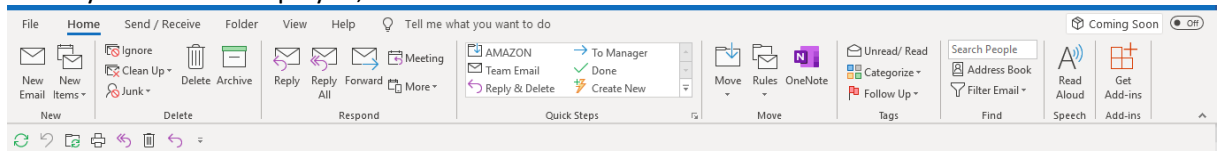
OR possibly like this:



You can 'customize' this, according to your own needs or preferences – i.e. which screen should be displayed first

Outlook Toolbar

When your Inbox is displayed, the default toolbar will look like this:



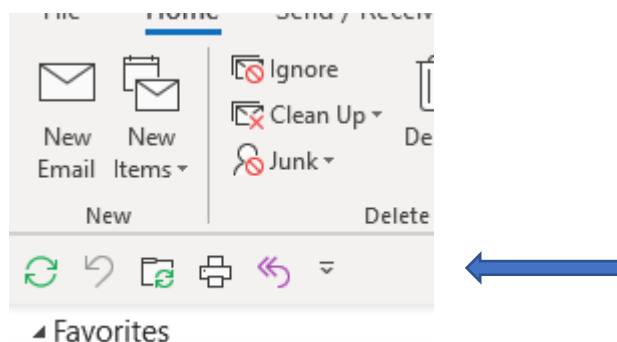
This toolbar is very 'busy' and probably includes some features and functions you might never need.

You can 'Customize' certain aspects of the toolbar, by clicking on the  or  symbol, where these appear

You can also customize it by clicking on 'File' > 'Options' > 'Customize Ribbon', which gives you many more 'customization' options

IT IS HIGHLY RECOMMENDED THAT YOU TAKE A LOOK AND FAMILIARIZE YOURSELF WITH THE MANY OPTIONS AND FEATURES AVAILABLE UNDER THE 'FILE' TAB.

As an alternative to the standard toolbar you could suppress it and replace it with your own “Quick Links” ribbon. By double-clicking on the  symbol you can customize this for your own needs, as I have done here



Again, you can also do this via the ‘File’ tab



To suppress the standard toolbar, click on the  symbol (top right of the screen) or the ‘up arrow’ symbol to the right of the standard toolbar.

Focused Inbox

The DEFAULT Inbox setting is for emails to be displayed using what Microsoft call a “FOCUSED INBOX”. This essentially means that you have to check TWO inboxes – ‘Focused’ and ‘Other’ - to read all of your emails!

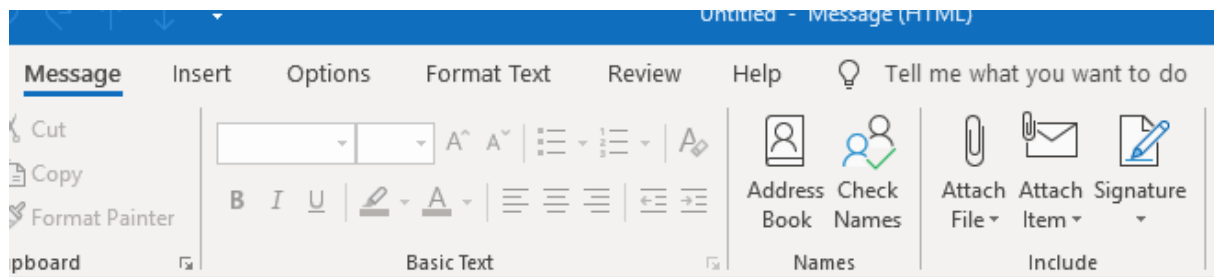
To suppress this
‘View’ > ‘Show Focused Inbox’

The two Inboxes should merge into one

Let’s look at the many options and features available when you are creating a new email. I will only cover some of the key functions – the ones you are most likely to want to use.

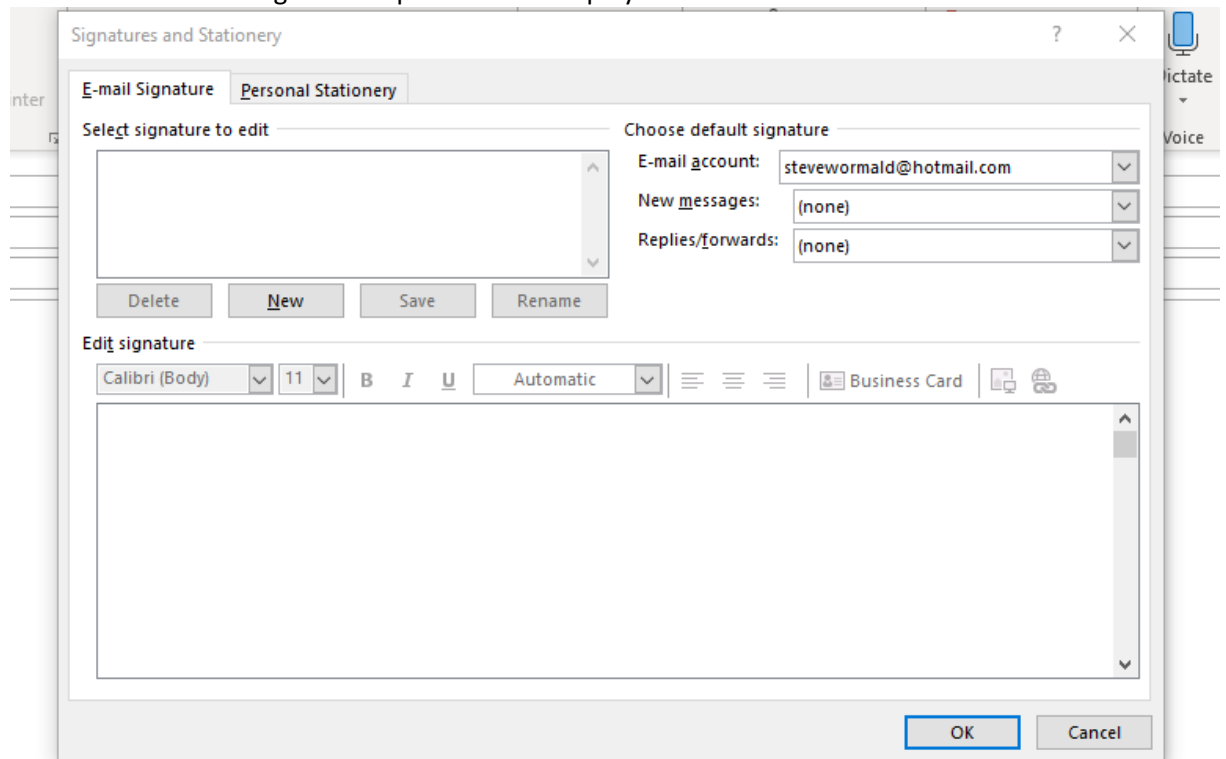
Adding an automatic Signature to your emails

When creating a new email, you have a number of options you can use:



One of these is to add your 'signature'

Double-click on the 'Signature' option: It will display a screen like this:



This can be created for one-time use or can be attached to all of your future emails

NOTE: This option is also available under the 'Insert' tab

NOTE: There is also a 'Signature' function on the browser version. HOWEVER, a signature you may have created there will NOT be picked up here.

Delivery Receipts and Read Receipts

There is nothing more frustrating than not knowing whether an email you've sent has (a) been delivered successfully and/or (b) whether it has been read

Under the 'Options' tab, you can request either or both.

NOTE: This MIGHT not work correctly if the recipient is NOT also using Outlook

Voting Buttons

You might be sending an email to a group of people - friends / family / colleagues / fellow members of a club or group, etc - in which you are seeking their approval for a suggestion or a proposal.

You can insert "Voting Buttons" which will appear at the top of your email text.

The standard options are Approve;Reject, Yes;No, Yes;No;Maybe, or you can create your own.

NOTE: Again, this MIGHT not work if the recipient is NOT also using Outlook

Delayed Send

You can create and store an email with the intention of it being sent at a fixed date and time in the future, by clicking on the Options > Delay Delivery function

You will see that many of the options I have just been describing are also available on this one 'pop up' screen

Choosing which format to use: HTML, Plain Text or Rich Text

Under the 'Format Text' tab

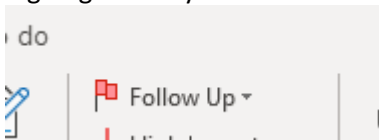
The Outlook Desktop App allows you to select the format you want to use – HTML, Plain Text or Rich Text – under the 'Format Text' tab

- **NOTE** that the browser version ONLY gives the options of HTML or Plain Text
- HTML allows formatting and is compatible with most available text readers
- PLAIN TEXT has NO formatting
- Rich Text is ONLY compatible with Outlook and MS Exchange

The default (and recommended) format is HTML

Flagging Emails

For both incoming and outgoing emails you can set a 'flag' as a reminder for you to follow it

up later, by pressing the  symbol

Folders

Folders are a way of organising your emails – both incoming and outgoing

Whether using the browser or the Desktop App version, folders are always displayed in the column on the left of your screen

Several Folders are already set up as standard – ‘Sent items’, ‘Drafts’, ‘Archive’, ‘In box’, ‘Deleted items’

You can create your own email folders

- There are no limits on the number of email folders you can have.
- No limits on the number of emails you can keep in each folder.

Both subject to the overall 50Gb storage limit.

Archive Folder

Used for storing emails which are no longer ‘current’ or ‘active’

- You want to keep them ‘*just in case*’

Archive IS counted within your overall 50Gb storage limit

User can manually move:

- Individual emails
- Entire email folders

In your Settings / preferences you can create ‘Archiving Rules’, to automatically move emails into Archive

- Emails older than a certain age
- Emails that meet certain criteria that you set up

Exact facilities depend on which version and Release of Outlook you are using.

The Archive folder **CANNOT be deleted**, although items stored in it CAN be deleted

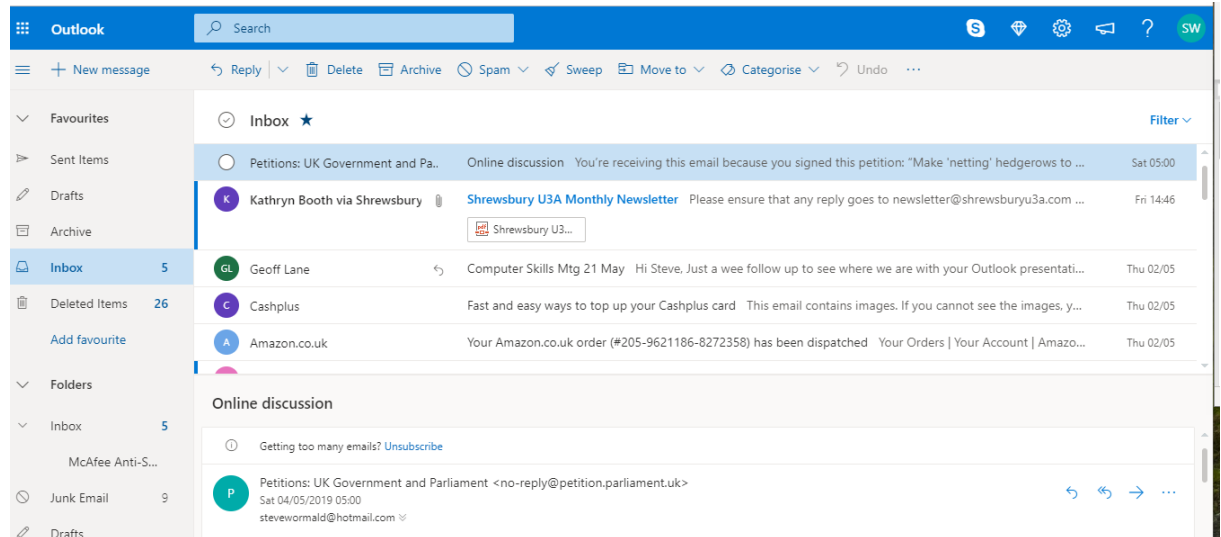
Items I have not covered under the Desktop App demonstration:

- *Shared calendars (see final page of these handout notes)*
 - *Shared Contacts Lists*
 - *Importing / Exporting contacts and calendars*
 - *Linking a Microsoft calendar to Google*
 - *Out of Office (details in Outlook Help – facility depends on the version and release the user is using)*
 - *Linking a Microsoft calendar to Google*
 - *POP mail vs IMAP*
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Outlook Browser Version

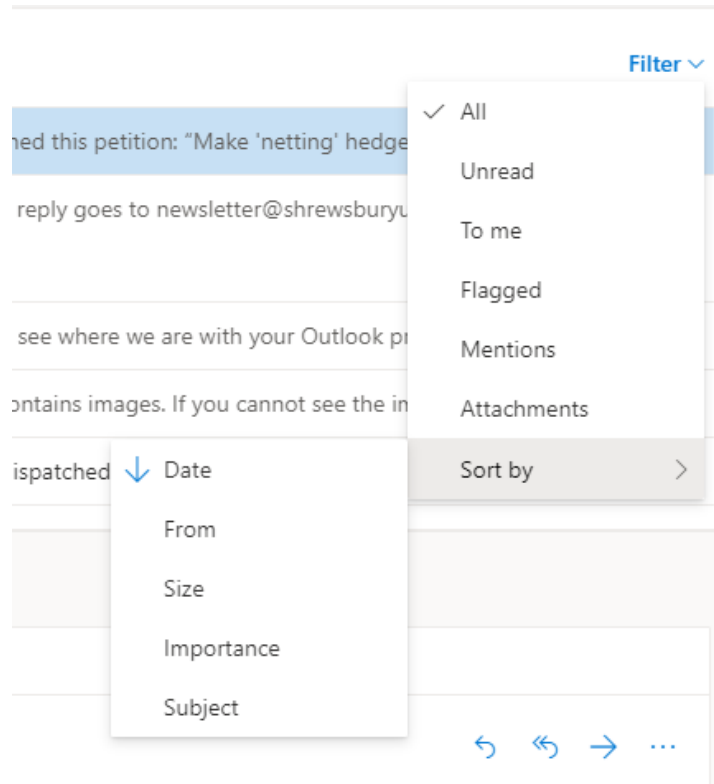
- When you login to Outlook.com or Hotmail.com it will normally display your Inbox first
- Unread emails are highlighted in **bold**
- The default setting is that newest emails are displayed in reverse chronological order (i.e. most recent first)

Slide 10



You can change this order by using the 'Filter' link (top right of the display area)

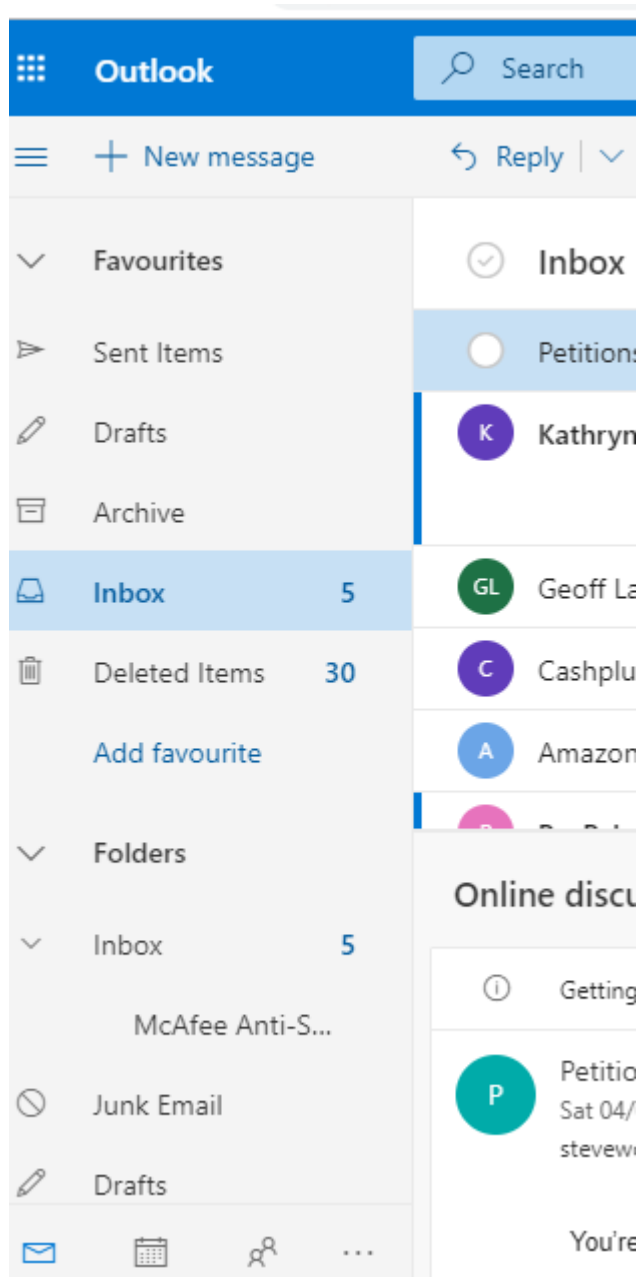
Slide 11



As with the Desktop App version, on the left of the display area you will see some folders. Certain Folders are automatically created by Outlook

- Inbox
- Junk Email
- Drafts
- Sent Items
- Scheduled
- Deleted Items
- Archive

Slide 12



You can organise Emails you want to keep by creating further Folders of your own
Using the 'New Folder' function at the bottom of the column

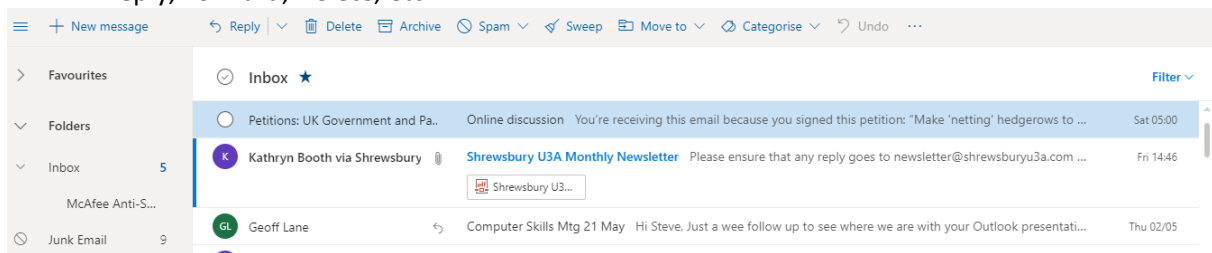
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Slide 13: Outlook function bar

Microsoft call this the “Ribbon”

The functions you are most likely to use are shown on the task bar at the top of the display area

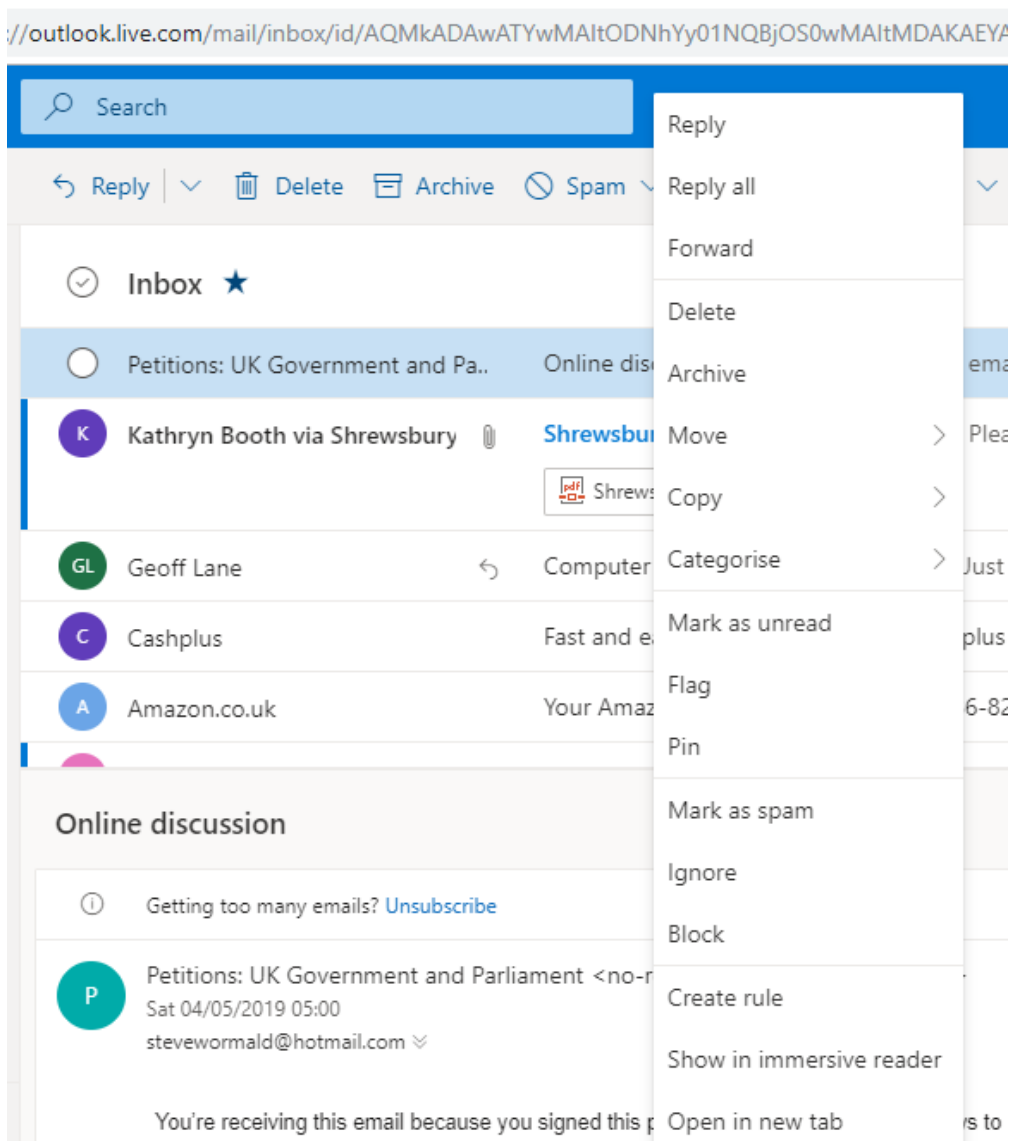
- Reply, Forward, Delete, etc



More functions are available from a drop-down menu behind the 3 dots symbol

ALL relevant functions can also be accessed by highlighting the particular email that you want to deal with and RIGHT-CLICK on your mouse

Slide 14



For IMPORTANT emails that you need to deal with you can PIN them so they will always stay at the top of the list until you have dealt with them

You can also 'FLAG' them to indicate urgency and by when you need to follow them up or need to have dealt with them by (e.g. a deadline)

Some emails or folders might no longer be relevant but you might want to keep them "just in case" they might be needed again at some time

You can move individual emails or entire Folders into the ARCHIVE folder

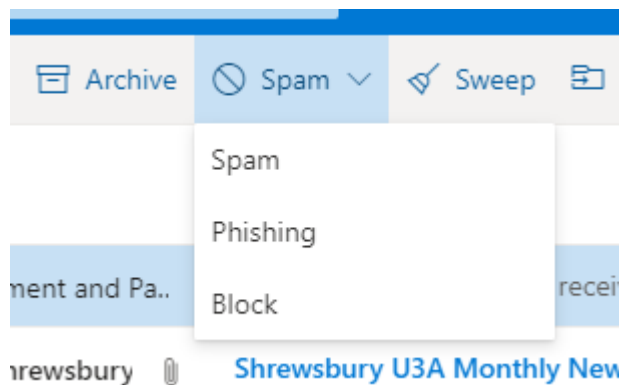
Items held in ARCHIVE count against your storage limit, which is 50Gb

In my case I keep some of my old work and business folders in there

You can mark individual emails as Spam, which gives you 3 options: Spam, Phishing or Block

Slide 15: Spam and Sweep

- You can mark an individual email as 'Spam', 'Phishing', or 'Block'
- 'Sweep' is a drastic tool for 'housekeeping', enabling deletion *en masse*

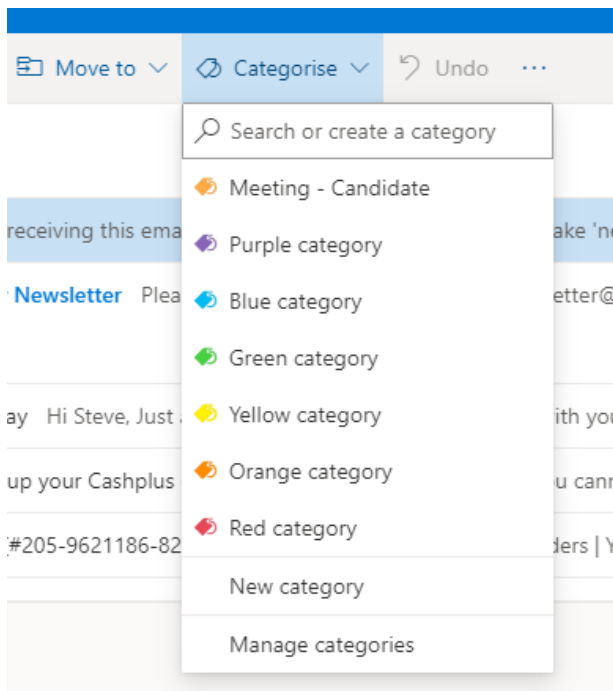


The 'Sweep' function is a fairly drastic way of performing 'housekeeping' on your emails and I do not recommend it

You can MOVE an email from your Inbox into a different Folder by using the 'Move to' function
Or by highlighting the email and using your mouse to 'drag and drop' it into the Folder of your choice

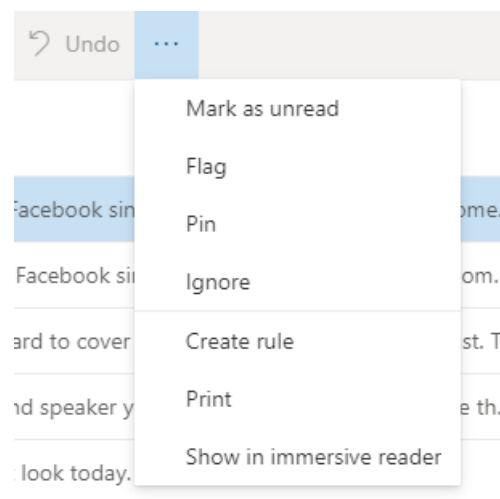
Slide 16

You can also use or create 'Categories' for your emails, but I doubt you will need to use that

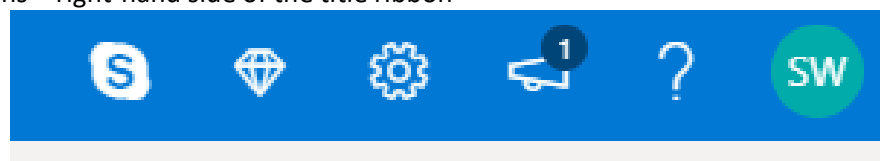


Slide 17 – Additional functions

Clicking the 3-dot symbol at the right-hand end of the toolbar will give you more functions:



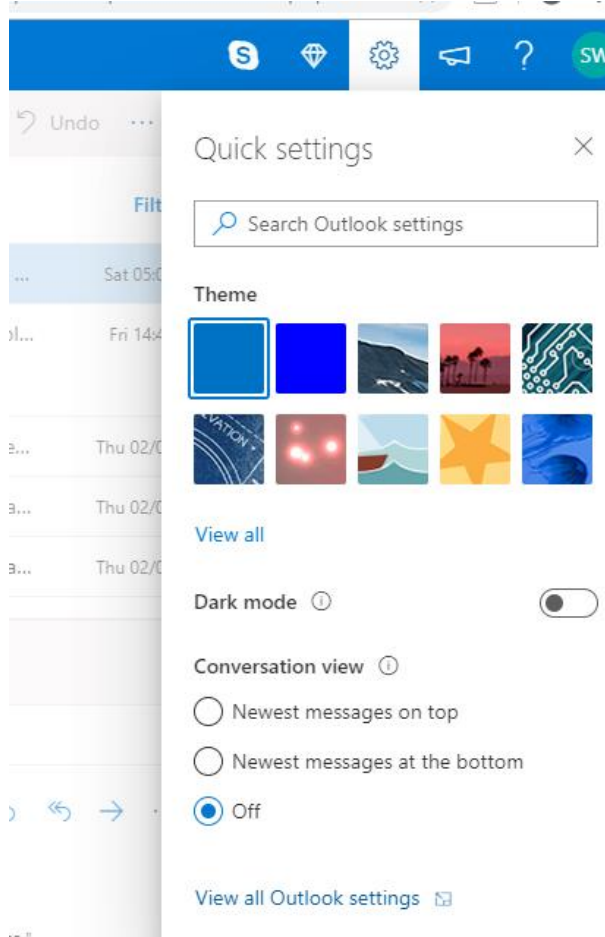
Slide 18: 'quick link' functions – right-hand side of the title ribbon



Skype; Manage Premium ('premium' users only); Settings; What's New; Help
Logout / switch user

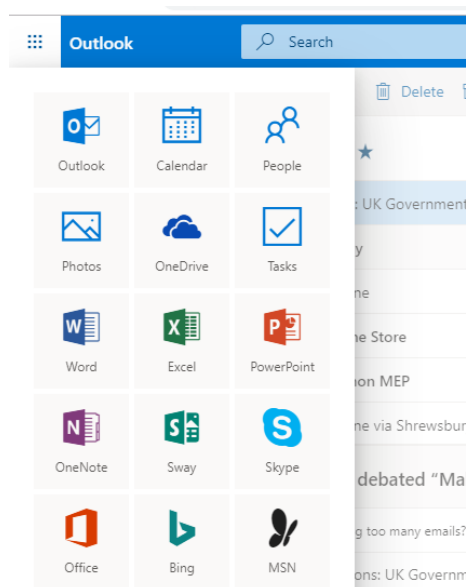
Slide 19 - settings

As with other Microsoft applications, you can change certain settings by clicking the 'cogwheel' symbol



Slide 20

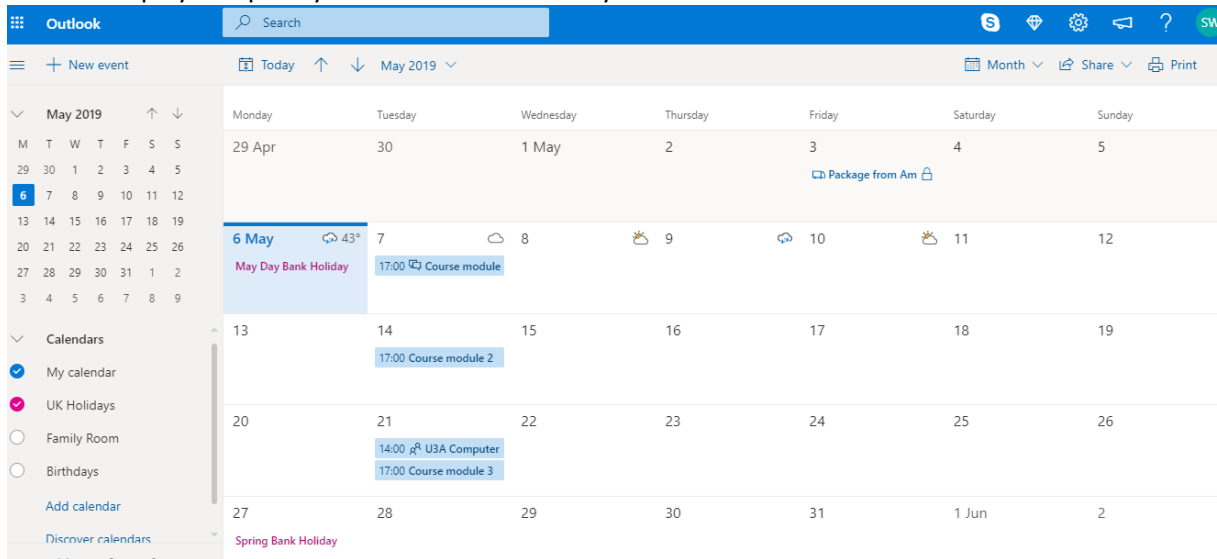
You can access other Outlook and Office functions by clicking the 9 dots symbol next to the word 'Outlook'



21: Calendar

These functions work in exactly the same way, in both the Browser and Desktop App versions.

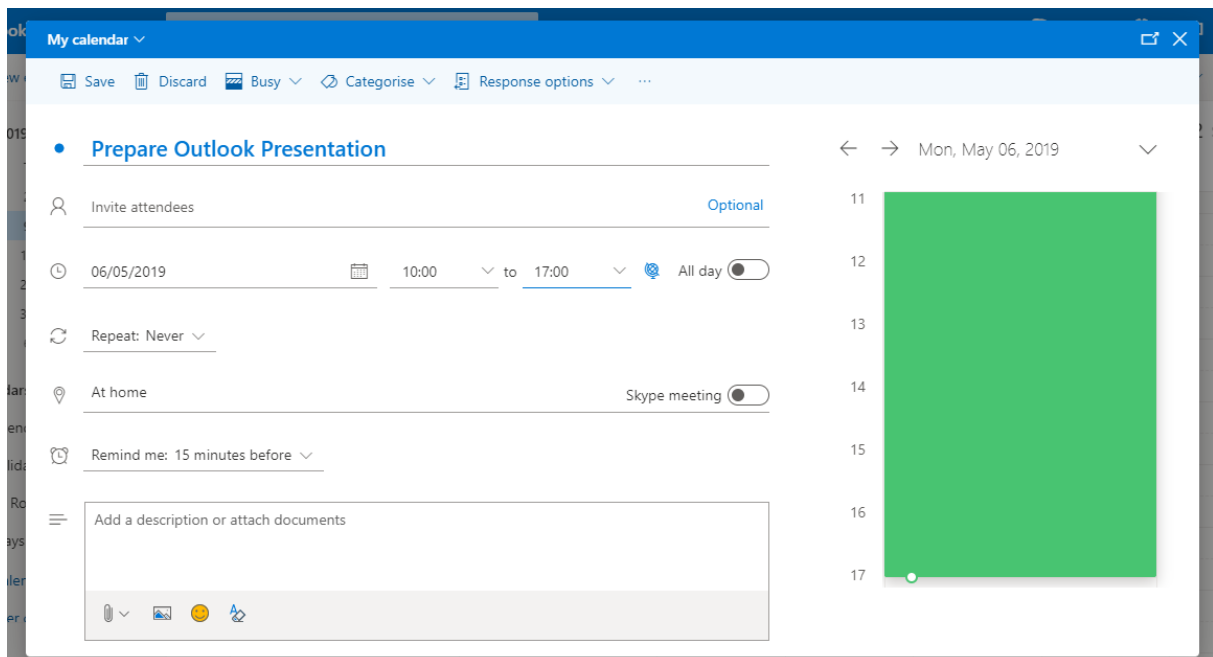
You can display and print your calendar in a variety of formats



22: Appointments / Invitations

Use the 'Calendar' function to record important upcoming bookings and appointments

These might be 'one-time' events' or re-occurring events. These features work in exactly the same way on both the browser and Desktop App versions.



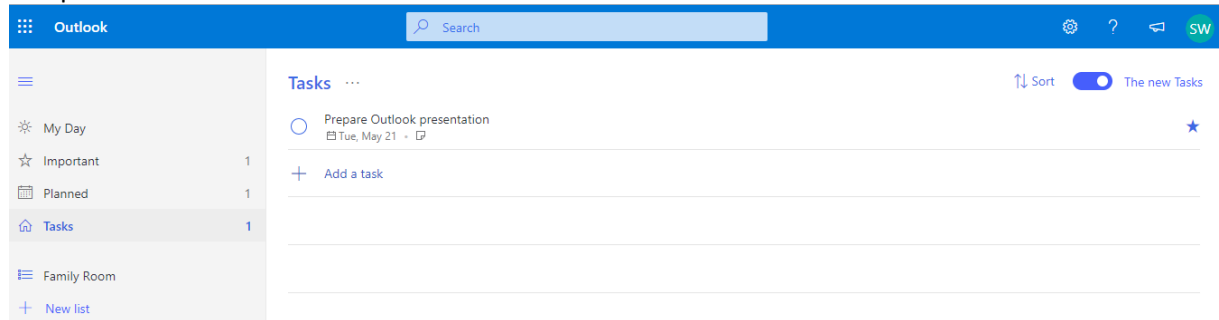
You can send invitations to other people, so long as you know their email address. For example, if you are trying to arrange a family event or maybe a get-together with ex work colleagues.

They DO NOT need to be using Outlook themselves – they will still receive an email of the invitation

You can even use this to arrange an 'online meeting' on Skype

23: Tasks and Reminders

You can use Outlook 'Tasks' to record Tasks & Reminders and 'mark them off' when they are complete



This can be very useful as an 'aide memoir' when you are trying to organise something and there are a number of individual things that need to be done in order to set it up (i.e. a plan)

Sharing a Calendar using the Outlook Desktop App

Share your calendar

1. At the bottom of the page, select  to go to Calendar.
2. At the top of the page, select **Share**, and choose the calendar you want to share.

Note: You can't share calendars owned by other people.

3. Enter the name or email address of the person with whom you want to share your calendar.
4. Choose how you want this person to use your calendar:
 - **Can view all details** lets the person see all the details of your events.
 - **Can edit** lets the person edit your calendar.
5. Select **Share**. If you decide not to share your calendar right now, select .

Notes:

- When sharing your calendar with non-Outlook.com users, such as Gmail users, they will only be able to accept the invitation using an Outlook.com or an Office 365 account.
- Calendar items marked private are protected. Most people with whom you share your calendar see only the time of items marked private, not the title, location, or other details. Recurring series marked as private will also show the recurrence pattern.