

Outlook for Microsoft 365



Module 1 Understanding the fundamentals of email

This course is suitable for delegates who are new to outlook or are self-taught and wish to ensure the foundation of their outlook usage is accurate and proficient. You must have a basic understanding of the use of your PC and operating system, including keyboard and mouse familiarity.

Objectives

The aim of the module is to provide you with the skills to send and receive email messages, to make this process as quick as possible and to control and manage your messages.

Course Outline

- Outlook application window
- Creating an email message
- Using spell check and the Thesaurus
- Using Signatures
- Formatting a message
- Saving draft messages
- Sending an email message
- Using the Address book
- Using Check James
- Using autocomplete
- Using Cc and Bcc
- Using message options
- Receiving an email
- Reply to or forward an email
- Sending and receiving attachments
- Dealing with junk email
- Using the out Of Office assistant
- Deleting messages
- Creating folders
- Filing and saving messages
- Finding messages
- Sorting messages
- Printing a message

Outlook for Microsoft 365



Module 2 Using the Calendar

Objectives

The aim of the module is to provide delegates with the skills to Use outlook to control their business diary and use the facilities available to arrange meetings with other members of staff and business contacts.

Course Outline

- Creating appointments
- Creating events
- Setting a reminder
- Creating recurring appointments and Events
- Editing appointments
- Moving, copying and deleting appointments
- Viewing the calendar
- Using the To Do bar
- Printing your calendar
- Scheduling a meeting
- Understanding Free/busy information
- Tracking responses to a meeting request
- Using Calendar groups
- Rearranging meetings
- Cancelling meetings
- Receiving a meeting request
- Sharing your calendar
- Viewing a shared calendar
- Calendar options

Outlook for Microsoft 365

Module 3 Using Tasks and Contacts

Objectives

The aim of the module is to provide delegates with the skills to use Tasks to control their to do list and use Contacts to store email, telephone and address details of associates and Use these within Outlook.

Course Outline

- Creating and Using Tasks
- Create a recurring Task
- Viewing your Tasks
- Moving an email to a Task
- Assign a Task
- Receiving an assigned Task
- Using the To Do bar
- Using Contacts
- Create a new Contact
- Send an email to a contact
- Print a Contact list
- Attach items within a Contact
- Adding pictures to a Contact
- Organising your Contacts
- Using Contact views
- Finding a Contact
- Using a Group
- Using a Contact Group
- Using shared Contacts
- Creating a Contact folder
- Importing Contacts from an Excel spreadsheet
- Export Contacts to an Excel spreadsheet

Outlook for Microsoft 365



Module 4 Organise your Outlook items

Objectives

The aim of the module is to provide delegates with the skills to Use all the facilities available to find an email, contact, appointment and task quickly and efficiently.

Course Outline

- Creating folders
- Using Quick Steps
- Using Rules
- Using Search
- Creating a Search Folder
- Using Flags
- Using Views
- Creating a custom view
- Sorting, grouping and filtering
- Using Categories
- Voting and Tracking options
- Saving emails to your hard drive or network Folder
- Creating an Outlook Data File
- Creating and Using Personal Folders
- Using Archive

Delegates will be asked to carry out exercises to reinforce the information they have been given. Handouts will be provided.

Venue requirement

Delegates –1 laptop/PC each with outlook for Microsoft 365 loaded (not online version)

Trainer will require access to a projector/screen to connect to the PC; whiteboard or flip chart