Learn Outlook 2019

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Section 1 – Introduction to Outlook 2019

Video: An Overview of Outlook 2019

Deb: Hello everyone and welcome to your Outlook 2019 training course. My name's Deb and I'm going to be your host and instructor for this course.

Now I've been using Outlook in its various different forms and versions for over 20 years and I've seen it go from a very simple application for receiving and sending email through to the sophisticated integrated mail calendar and task management system that we all know and love today. And with each new version improvements are made to make your life simpler and easier when it comes to managing the enormous amount of emails we all receive on a daily basis. And Outlook 2019 makes it easier than ever to keep on top your email, stay organized with Calendar and keep track of tasks and To Do items.

In this course I aim to provide you with a comprehensive overview of the different features available in Outlook 2019, whether you are coming to this course as a beginner with no prior knowledge in Outlook or whether your skills are a little bit intermediate or advanced I'm 100% sure you will pick up at least something which will increase and improve your efficiency when working in Outlook.

I also hope to introduce you to some of the newer features that maybe you didn't know existed or were unsure of and also show you some cool tips and tricks that can really help you take your Outlook use from basic to advanced.

Now if Outlook is brand new for you I guess we should start out with the very burning question, what exactly is Outlook and why is it useful to you?

Well Outlook is a personal information manager from Microsoft that makes up part of the Office Suite of applications. It's primarily known as being an email application that allows you to send and manage your emails but it's also a calendar, contact manager, task manager and journal. Every part of Outlook integrates seamlessly together to maximize productivity and efficiency. And it can also be used for personal email. For example, if you've ever had a Hotmail account this will now be an Outlook account and you can set up a free personal email account on Outlook.com. And free Outlook.com accounts come with 15 gig of storage space whereas Office 365 users using Outlook get 50 gig of storage space.

Now if you are using Outlook within your organization it's more than likely that you'll be using a desktop version of Outlook attached to a Microsoft exchange server. This course is written for Outlook 2019 but will also apply to users of Outlook 2016 with some very minor differences. We'll be covering all of the tasks required to efficiently manage email, calendars, contacts, and tasks within the application.

In this first section I'll be talking you through the difference between Outlook 2019 and Outlook Online in Office 365 and I'll be letting you know what to expect from this course and also directing you to Help resources that are available. So sit back and relax and I will see you in the next module.

Video: Outlook 2019 vs Outlook Online in Office 365

Deb: Hello everyone and welcome back to this course on Outlook 2019. In this module I want to talk to you very briefly about the difference between Outlook 2019 and Outlook Online in Office 365. Now I know there is always so much confusion surrounding this so I just want to make sure that you're clear on it before we move forward.

Now what I currently have on my screen is Outlook 2019, the desktop version. And this is the version that this course is based on and the version that we'll be working through over the course of the next few sections. Now this is what we would call a standalone application. So for example, if I wanted to purchase a copy of Outlook 2019 I could jump onto Google or Bing, I could type in Purchase Outlook 2019 and I'll be taken to a page where I could download the software onto my PC. And for that I would have to pay a pretty hefty price tag because it's a one time download. And once I've downloaded it onto my PC it's only available to me on my PC or laptop. And you could download the standalone versions of all of the Microsoft applications, so Excel, Word, PowerPoint, so on and so forth.

Office 365 on the other hand is a subscription service. So instead of paying $200-300 to download Outlook or the Microsoft Suite onto your laptop what you could do is pay a monthly subscription. And you can see here I'm clicked on the Office 365 Homepage and it's showing me some of the different suites that are on offer for home use and also for business use. And you can see there the price of the subscription per month. So essentially this works similar to something like Netflix or Spotify where you pay a monthly subscription fee and you essentially can rent the applications from Microsoft. So any Office 365 subscription allows you to download all of the Microsoft applications. So that includes Outlook. And you can download them onto your PC. And the good thing about Office 365 is that you can download all of the applications on five separate devices. So if you have a couple of laptops at home, a PC, maybe an iPad with one subscription you can have your Office applications available across all of your devices. And with Office 365 you'll receive regular updates. So whenever Microsoft makes an update to any of the applications it will automatically be delivered to you and your software will be updated.

This is slightly different to if you purchase the individual application. So in this case the standalone version of Outlook 2019. This doesn't get updated regularly because you've downloaded it onto your PC. You're not essentially renting it from Microsoft.

So those are the main differences. Now whilst a lot of people are moving over onto Office 365 and we do have courses designed specifically for Office 365 users there are still a lot of people out there for whatever reason who still prefer to purchase these products. That includes a lot of larger organizations who haven't yet made that switch to Office 365. So this course is really designed for those people who are still purchasing the standalone versions and Outlook 2019 is the latest version and it's really the one that's most in line with the Office 365 versions.

If you remember what I said, Office 365 is constantly being updated so any changes are available within Office 365 if you have a subscription. So what Microsoft have done have brought out the 2019 range, which pulls these desktop standalone versions in line with the latest changes in Office 365.

Now I will say there isn't a huge amount of difference. So whether you're using the Office 365 version of Outlook or you have the standalone version, 2019 or even 2016, there are a few differences but not so much that this course would be irrelevant to you. So if you are using Office 365 you'd probably still get quite a lot out of this course because there really aren't too many major differences. So I know that that is quite a lot of information to take in and it is something which people, I found people really struggle with in their heads. Like what is the difference between the two? So hopefully that does explain it a little bit better for you. This version we're using isn't the subscription version, it is the standalone version but essentially there aren't a great deal of differences between the two. So with all that said, let's move on to the next module where I'm going to explain to you what you can expect from this course, so please join me for that.

Video: What to Expect from this Course

Deb: Hello everyone and welcome back to our course on Outlook 2019. In this module I just want to briefly explain to you what to expect from this course.

Now this course is divided down into ten sections and each section contains between five and ten different modules, with a total of 55 modules in the entire course. Now within each module you will find a video and that video will be between 5 and 12 minutes long. That will be a video demonstration of the particular task or topic in that module. I try to go through each topic thoroughly, including productivity tips and keyboard shortcuts along the way.

You can stop these videos at any point. So if you are working along with me in Outlook and I'm going a little bit too quickly you can pause the video, catch up with me, or even rewind to the beginning and re-watch again. And you'll find that along the way there will be a series of practice exercises and a course quiz.

Now I mentioned there are ten different sections and each section contains many, many different modules.

So in the first section, section one, that's just an introduction to Outlook 2019. So I'm going to give you an overview of Outlook, introduce you to things like keyboard shortcuts and show you where you can go to find help with Outlook.

In section two we're going to focus on setting up Outlook. So really just getting started. So I'm going to show you things like how to add an account to Outlook and how to customize the way that you're viewing your Outlook.

In section three we're going to focus on sending and receiving mail. So we will be creating new mails, formatting emails and also taking a look at what happens when we receive mail as well.

In section four we're going to discuss how you can search through your mail and all the different options that you have on the contextual search toolbar and also some of the more advanced search options as well.

In section five we're going to go through all of the tools that you have for organizing and managing emails. So that might be creating folders to house your mails in, categorizing your emails using follow up flags and also using utilities like archiving, cleaning up conversations, restoring, and deleting.

In section six we'll be focusing more on creating and sending mail and delving into some of the more advanced features. So adding things like delivery options, voting buttons, utilizing @ mentions and also setting up things like email signatures and applying automatic replies.

In section seven we're going to focus on working with people. So that would be adding contacts into Outlook, also creating things like new contact groups and editing our contacts.

In section eight we're going to work with our calendar. So I'm going to show you how to create new appointments, new all day events, new meetings, how you send and also respond to calendar invites, and how you can do things like share your calendar with others and also set up delegate access.

In section nine we're going to focus on task, notes and shortcuts. So I'm going to show you how you can create really nice task lists, how you can edit your tasks, track your progress, and also assign tasks to others. I'm going to show you the different options you have for keeping notes within Outlook and also some of the shortcuts that you have available.

And then finally just to finish up the course we're going to jump into the backstage area and take a look at all the different options we have for customizing our copy of Outlook.

So without further ado let's finish off this first introductory section where I'm going to talk to you about keyboard shortcuts and also where you can access Help. So please join me in the next modules for that.

Video: Getting Help with Outlook 2019

Deb: Hello again and welcome back to our course on Outlook 2019. In this module I want to show you where you can go within Outlook to get help.

So we all need help from time to time when we are working in Outlook. It might be that you have forgotten how to do a particular task or you're looking for a particular command. And there are a number of ways withing Outlook 2019 that you can access some really useful Help options.

Now we're going to start with the most obvious one and this is something which came in in I think it was Outlook 2016 and that is the Tell me what you want to do bar. Now you'll see that bar sitting up amongst your Ribbon tabs. So you'll see a little lightbulb icon and then you'll have a little box up there that says Tell me what you want to do. And this is great if you're looking for help or information on a particular task that you're trying to do within Outlook.

So all you need to do is hover your mouse over the Tell me what to do box and you'll see there that there is also a keyboard shortcut of Alt+Q. And it says there in the screen tip just start typing here to bring features to your fingertips and get some help. And that's pretty much exactly what it does.

So if I click in this box and maybe I'm not sure how to categorize emails. So I can start to type in what I'm looking and you'll see it's an intelligent search. So as I type Outlook is pulling up suggestions for me. And I can see there that the top one is Categorize. And straightaway it's popping me out all of those different categories that I can add to my emails to make them stand out and to group them together. If I was looking for something like automatic replies or out of office as it's most commonly known I could start to type in Automatic and if I click Automatic Replies it pulls up the exact dialog box that I need in order to set an automatic reply. So it's a really great way of jumping straight to a command that you're interested in.

So don't forget about that, the Tell me what you want to do box.

Now another way to access Help and this is Help again on any commands that you might be interested in, but also to access things like helpful tutorials on specific things in Outlook, you have a dedicated Help ribbon.

Now if for some reason when you're looking at your Outlook you don't see this Help ribbon it might be that you just haven't turned that ribbon on. So let me show you very quickly where you go to turn this ribbon on in case yours is turned off.

Let's jump to File and go into our backstage area and we're going to move directly down to our Outlook Options. And you'll find all of the options related to the ribbons underneath the Customize Ribbon category.

Now over in the righthand side you'll see here it says Main Tabs and then we have a number of these tabs ticked. And one of the ones that I have ticked is Help. So you might find that if you don't have that Help ribbon showing it just means that your tick isn't in the box like this. So make sure you pop a tick in there, click on OK, and then you should find your Help ribbon.

Now in here again you have numerous different Help options. So if we just click on this first one and again you can pull up Microsoft Help automatically using the shortcut key of F1 and this will pop a pane out on the righthand side. And once again you can browse through the different categories. So if I jump to Get Started it's going to go through the basics of setting up my email account. If I click the arrow to go back to the main menu I could choose a different category to browse to. And I have all of these subcategories that I can browse through.

Alternatively if I was searching for something very specific and didn't want to go through all of these categories I can use the Search bar at the top and maybe I'm looking at better ways of managing my junk mail and it pulls up all of those junk mail help topics. So a really nice little way of being able to access Help whilst you're still working within Outlook 2019.

And I'm going to close that pane down once I'm done.

Now there are lots of other options up here. So for example you could contact support if you wanted to. So again this is going to pop a pane out on the righthand side. You can type a message and you can send. You can suggest a feature. So if you think to yourself, "Wow. I really wish I could do such-and-such in Outlook" then you have an option there to suggest a feature to Microsoft. Whether they take you up on that though is another matter, but you definitely can make suggestions for things to be added into Outlook.

The other main one I really want to point out to you here is this Show Training option. Now a lot of the time in my experience people tend to learn a little bit better when they're watching demonstration videos. And this is exactly what this button will show you. It will give you access to all of the Outlook training videos from directly within Outlook 2019. So again they're divided down into categories but I could jump to Quick Start just here and I could access a video about how to add an email account to Outlook. So if training videos is your thing and that's how you enjoy or find that you learn best you definitely have access to all of these underneath that Show Training option on the Help ribbon.

So there you go, a few different ways for you to gain some really insightful and helpful information relating to different topics within Outlook 2019. That's it on Help for now. Please join me in the next module.

Video: Keyboard Shortcuts

Deb: Hello everyone and welcome back to our course on Outlook 2019. We're still in this first section where we're getting ourselves geared up to dive into our main course. Now before we do that the final thing I want to point out to you here is I just want to mention keyboard shortcuts. You're going to hear me refer to keyboard shortcuts quite a lot as we go through this course. And again if you're not sure what I mean by the term keyboard shortcuts it's a quick way of performing tasks.

So the majority of the time if we're doing tasks we are clicking around on our different commands on the ribbon or maybe we're right clicking and selecting commands from a menu, but in order to improve our efficiency we can also use keyboard shortcuts, which just really means pressing a combination of keys on the keyboard to perform a specific task.

Now a lot of people love their keyboard shortcuts and you may have a few that you use possibly in other applications. So if you work a lot in something like Word or Excel you might be used to using the keyboard shortcut Control-C to copy or Control-V to paste. You also have shortcuts that you can use within Outlook. And all I really want to do in this module is just show you where to find a list of all of the keyboard shortcuts available to you so you can jot down a few that you think will be really useful or print them all out if you want to and have them close at hand so you can work more efficiently within Outlook.

So I'm currently clicked on the Home ribbon and I'm just going to hover my mouse over this first icon that says New Mail. Now you can see in that little screen tip that pops up in the brackets we have Control plus N. Now anything that's in brackets is the keyboard shortcut. So essentially if I press Control-N on my keyboard it's going to action that. It's going to create a new email. And you'll see for many of these items as you hover over you will have a keyboard shortcut. So there for Ignoring Conversations Control plus Delete. Delete, Control plus D, Archive is just a Backspace, reply, Control plus R, so on and so forth.

There are so many shortcuts available in Outlook you're definitely not going to remember all of them off the top of your head, but you will find that over time there will be a few that you use consistently and you will always remember those ones.

Now if you do want to expand your use of keyboard shortcuts the best way of finding out or getting a list of what they all are is to jump up into this Tell me what you want to do area and if we click in here, I'm going to type in Keyboard Shortcuts. It's telling me there are ten results in the Help file. So I'm going to click on that and my Help pane is going to open up. Now I'm going to drag that out, you see I'm just dragging the window, and I'm going to make that a bit bigger. And the first item there is Keyboard Shortcuts for Outlook. So let's click on that link and essentially it gives me a little bit of information about keyboard shortcuts and then I have lots of different headings. So Shortcuts for Navigation, Shortcuts for Creating Items or Files,

Formatting, so on and so forth. So they're divided down into sections. So if I click on Frequently Used Shortcuts I get this little table and it gives me all of my shortcut keys to perform these tasks. And as I said, there are a lot of them. So you might want to go through them and just jot down some which you think you might use most frequently.

Another thing that's worth pointing out, a little trick, is if you press the Alt key on your keyboard can you see what's come up on the ribbon now? I have various different numbers and letters assigned to different parts of my ribbon. So I can see that if I want to jump to that Home ribbon I can press the H key. It jumps me to the Home ribbon and now if I want to create a new email it's got N1 assigned to it. So I can say N1 and it creates me a new emails. So sometimes that's a little bit quicker than memorizing keyboard shortcuts. Just press your Alt key and then you get those shortcuts come up. So if I wanted to jump to this Folder ribbon I would press O, it takes me to my Folder ribbon. If I want to create a new folder I can press N and now it gives me the Create New Folder dialog box.

So a few different options in there for you when it comes to keyboard shortcuts.

So that is it for this first introductory section. We're now going to actually do some work and we're going to move into section two where we're going to be talking about how you can set up your Outlook, so please join me for that.

Section 2 – Setting Up Outlook

Video: Navigating the Outlook Interface

Deb: Hello everyone and welcome back to this course on Outlook 2019. We're now down into section two where we're going to take a look at the basics of Outlook. So we're going to go through how you can set up Outlook in later modules but right now I really just want to concentrate on the layout of Outlook and how you can navigate around the screen.

Now if you've used Microsoft products for years then this will probably look reasonably familiar to you and nothing I'm going to say here is going to probably too revelatory for you but for those of you who are a little unfamiliar with the layout of Outlook, so maybe you're coming from a completely different email application, let me just run through the key points of the interface.

So starting at the top we have what we call our Ribbons. And these little things up here, so where it says File, Home, Send/Receive, Folder, View, etcetera these are your ribbon tabs. So each of these tabs is clickable. And when you click on it it displays the ribbon associated with that particular tab. And all of the commands on each of the ribbons relate to this ribbon tab name. So in general what you'll find on something like the Home ribbon would be all of the commands that are most useful to you, the ones that you use most frequently. If you want to work with folders then you might possibly jump to the Folder ribbon. If you want to do things like customize your views and the way that you're actually looking at Outlook you might go to the View ribbon. The Developer ribbon always contains some more advanced features. So you'll usually find things like macros and forms on the Developer ribbon. And then the Help ribbon is fairly self-explanatory.

Now one of the ribbon tabs up here which is a little bit different to the others is this File ribbon tab. And you'll see when I click on it we get a very different view to what we were looking at before. So when you click on File it essentially takes you into what we refer to as the Backstage are. And again this is standard now across all of the Microsoft applications. So if you use Excel, Word, PowerPoint, every time you click on File it's going to take you into the Backstage area.

And the way that I like to think of this is it's more like the administration side of Outlook. So this is where you can come to set up more email accounts, you can export your information out of Outlook, you can save attachments, you can come in here if you want to print anything, and you can also access your Office account. So if you want to change anything with regards to your settings you can jump into your Office account and do things like update your photo, change your theme, background, so on and so forth.

This is also where you'll see your product information. So you can see here it says that I'm using Office Professional Plus 2019. And it's also going to show me in here any services that I have

connected. So you can see here that I currently have OneDrive for my cloud storage and also a SharePoint site connected as well.

And the other useful thing that you'll find in the Backstage area is this main Options dialog box. So this is where you can come to customize all of your options related to how you use Outlook. And there are so many categories and so many different options in here and what we're going to do is we're not going to go through them all now because it'll be quite a lot for your brain to take in and you'll probably never remember them as we go through the course, so as we go through the different modules I'm probably going to dip in and dip out of these options and show you the ones that I would change in relation to the specific topic that we're covering at the time.

So File is your Backstage or your administration area. Let's click on the arrow to come back to our main Outlook view.

So these are your ribbons. Now if we take the Home ribbon, for example, you can see we have lots and lots of different commands on this ribbon. And all commands are grouped together or categorized. So you can see here at the bottom we have the name of each group. So this first one here is New, we then have Delete, Respond, Quick Steps, Move, Tags, Groups, Find, Speech, and Add-ins. So this just really categorizes commands that are of similar type.

Now one thing that's also worth noting about these ribbons is that they won't always stay the same. The ribbons will change depending on what part of Outlook you're in and also what you're doing in Outlook. Let me give you an example.

If I was to create a new email message, so I'm going to click on the New Email button, you can see now within this new email message window I get a new set of ribbons. So I have Message, Insert, Options, Format Text, Review, so on and so forth. So these ribbons contain all of the commands that are specifically related to creating a new email message. So for example, with a new email message I might want to attach some kind of document and if I jump to my Insert ribbon I have my options to attach files from there. So the point I'm really trying to make here is that those ribbons will change depending on what you're doing.

You'll also see as we go through this course once you start to do things those ribbons will also change as well. So for example, if I was to insert a picture into this email message you'll see that I get an entirely new ribbon related specifically to that picture. And that is what we call a Contextual Ribbon. Contextual ribbons only appear when they're needed. Now let me show you what I mean by that. I'll do a very quick example. I'm just going to insert a quick table. So let me put a table in and what you'll see now is that I get two new ribbons under the category Table Tools, Design and Layout. And that's because I've inserted a table and I'm currently clicked in that table. So this is Microsoft's way of only showing you the tools and commands that you need when you need them. It reduces clutter on your ribbons. So as you would imagine on the Design ribbon I have all the different ways that I can format my table and on the Layout ribbon I have options for doing things like inserting rows, deleting rows, splitting cells, so on and so forth.

Now this ribbon only appears because I'm currently clicked in this table. If I click my mouse somewhere else in the email message outside of that table you can see that my Table Tools contextual ribbon disappears because I no longer need it. I'm not longer clicked in the table. If I click inside the table again it comes back. So contextual ribbons are a really important thing to get your head around as well.

Now the other thing that we have up here, we've already explored, that is the Tell me what you want to do box. So if you're looking for help on a particular command or utility you can just type that into there, keyboard shortcut Alt-Q for that.

And then right underneath our ribbons we have something called the Quick Access Toolbar. Now currently it's not very obvious because I don't have a great deal on my Quick Access Toolbar. I have this little icon here, Send and Receive, and I also have an Undo icon and then there's a little down arrow. And this is where I can customize my Quick Access Toolbar. And we're actually going to do that in the next module.

But what the idea of this Quick Access Toolbar is is that you can have on here all of the commands that you use most frequently, so you're not having to search around in the ribbons to find them.

Directly underneath your Quick Access Toolbar icons we have our left hand pane. So this is really your navigation pane. And it's where you access your mailbox and any folders that you have attached. So you can see my mailbox here, train@debashby. I have my Inbox, which is going to show me all of my emails, and then I have my various different standard folders that automatically appear when you create a new Outlook account. Now obviously I can add my own folders to this, but this is kind of the standard set of folders that you're going to get.

Then underneath that, right at the bottom we have a series of six icons. And I always say to people it's worth remembering that Outlook is far more than just email. You have access to your Outlook calendar, you have access to your contacts or people, you have access to a To Do list, you have access to a Notes section, and then you have access to a Folder section. And again we're going to go through all of these icons throughout the modules, but this is how you would switch to if you wanted to jump to your calendar you can see as I hover over I get a little quick preview, but if I want to jump to my full calendar if I just click that icon and it's going to switch me to my calendar. So very easy to jump between the different parts of Outlook.

Then of course finally in the middle we have our main Outlook view. So currently because I'm clicked on Inbox I'm seeing all of the mails that I have in my Inbox. So you can see the current information I'm displaying is From, so who the email is from, the subject, when it was received, the size, the category, if there's been a category applied, if anyone's been mentioned, and I'm going to talk about that later in the course, and also if anything has been flagged as well. Now all of these column headings are customizable again and when we look at the View section I'm

going to show you how you can create your own column headings, but this is kind of fairly standard and this in general is how I would have my Outlook set up.

Now one other thing you may notice, and again this is something that's fairly new for Outlook, is that we have two different styles of Inbox. We have the Focused Inbox, which is what we're clicked on now, and then we have Other over here. Now this might be a feature you like or you dislike and I'm going to go through exactly what the Focused Inbox is in a later module and I'm also going to show you how to turn it off if you don't like viewing your emails this way.

Just above our email list we have our Search feature. So this will allow me to search for particular mails and I can search within current mailbox, current folder, subfolder, so on and so forth.

And then finally running along the bottom we have our status bar. Now I don't have a great deal of information showing in my status bar but it does show me that I have 12 items. You can see that all the way over on the left hand side in the corner. I have seven reminders and I can click to review my reminders. It's telling me that all my folders are up to date, so they're synchronized, and it tells me that I'm connected to the Microsoft Exchange server.

I also then have two different ways that I can view my inbox. So I'm currently on Normal View, which is going to show me all pinned panes, or I could switch to Reading View which is basically going to get rid of my different panes. So I can see more of my email without the distraction of any panes on either side. So again entirely up to you how you prefer to word.

And then finally we have a little slider just here. So if you want to zoom in or zoom out you can use this slider and either see more or less of what's on your screen.

Now one other thing to note here is that if you want to collapse up your ribbon you can definitely do that to give yourself a little bit more room. Over on the righthand side in the very bottom corner of the ribbon you see we have this little Collapse the Ribbon icon. And there's also a shortcut key for that, Control plus F1, but if I click on this button it's just going to collapse that ribbon up. So again it just takes those ribbons out of the way, allows me to focus in on what I want to see.

Now if I want to bring the ribbons back if I just click on any of the ribbon, so if I say Home for example, now because I collapsed it every time I click away the ribbons are going to disappear. But if you decide that you actually want them back permanently just click on one of the ribbons and then go back over to the righthand side and you'll see that we now have a Pin the Ribbon icon. Again, Control-F1 and that will pin those ribbons back in place.

And then finally in the top corner we have our standard Microsoft buttons. We have our cross which is going to close all of Outlook, we have our Restore down, so that's going to minimize or maximize your Outlook window, we have the Minimize button which is going to basically

minimize all of Outlook down into the system tray, and then we have some ribbon display options. So again I can choose to auto hide the ribbon, I can show just the tabs, or I can show tabs and commands. So currently I have my ribbon tabs showing and all of the commands, but if I just wanted to show tabs I could do that as well, which pretty much takes it to the same view as when we collapsed the ribbon. So a few different ribbon view options just there.

And that is basically it. We've just seen in a few minutes there how you can navigate efficiently around the Outlook interface.

That's it for this module. Please join me in the next one.

Video: The Ribbons and the Quick Access Toolbar

Deb: Hello again and welcome back to this course on Outlook 2019. This is Deb and we are still down in section two where we're looking at the basics, how to set up your Outlook and also becoming familiar with the structure and the interface that you're using.

Now in the previous module we had a little look at the different elements that make up the Outlook interface and we talked a lot about the ribbon structure that we have at the top here. We also briefly mentioned the Quick Access Toolbar and that is what I want to cover in a little bit more detail in this particular module because I think once you start using it it's going to be something that you find invaluable.

Now because there are so many different commands in Outlook and they are spread out across all of the ribbons sometimes you'll find yourself looking around for a particular command across all of the ribbons. So I know in my case a lot of the time I don't always automatically know where a particular command that I'm looking for lives. So it's a lot easier for you to have those easily accessible on one toolbar that you can customize.

Now one thing that I will also say is that whilst we do have lots and lots of different commands across all of the ribbons this is by no means all of the commands available to you in Outlook. There are lots of commands available in Outlook which aren't actually displayed on the ribbons, which I've always thought is a very interesting point. However, when you're setting up your Quick Access Toolbar you can add those commands to the Quick Access Toolbar as well if you want to. Now let's just review what we mean by the Quick Access Toolbar.

Now from this point you'll probably hear me refer to the Quick Access Toolbar as the QAT, simply because it's a lot quicker to say. So when I'm talking about QAT that's what I mean, Quick Access Toolbar. And just to remind ourselves again, the Quick Access Toolbar is this tiny little toolbar that I barely have anything on that sits lurking just underneath the ribbon.

Now if you're looking at your Outlook as I'm talking to you now you might be looking underneath your ribbon thinking, "Well, I don't see a Quick Access Toolbar." It might be that your Quick Access Toolbar is located above your ribbon. Some people have it above, other people have it below. Now if I click this little dropdown on the end of this Quick Access Toolbar you can see I have an option right at the bottom for Show Above Ribbon. So if I click that it moves it up to here right in the top left hand corner. Now if you prefer it up there that is absolutely fine. I personally if it's all the way shoved in the corner I tend to forget it's there, which is why I like to have mine below the ribbon. But again that's entirely personal preference.

Now currently on my Quick Access Toolbar I have two icons. I have this little one here, Send/Receive All Folders. So that's really just a refresh of my Outlook. And I also have the Undo or the Control-Z command. Now these two are by no means the only commands that use on a regular basis. There are lots of commands in Outlook that I find myself reaching for all the

time. For example, what is the most common thing you do in your Outlook email? I'm guessing it's probably creating a new email to send to someone. And you can see just above we have the New Email button, keyboard shortcut Control plus N, on the Home ribbon. Now this one's quite easy to find. It's the first one on the Home ribbon, but if I wanted to I could add the New Email button to my Quick Access Toolbar so that if maybe I'm on the View ribbon and I decide that I want to create a new email instead of jumping back to Home I can just click the icon on my Quick Access Toolbar.

So how do we add commands to our QAT? Well there's a few different ways. The quickest and easiest way is that if you see the icon you want to add on the Ribbon, so let's say New Email again, right click your mouse and the first option is Add to Quick Access Toolbar. And you can see now I have my New Mail icon and if I click it I get a new email message. And you can go through and I could add Reply if I wanted to. So right click, Add to Quick Access Toolbar. Maybe I want to jump across to Folder and maybe I'm always creating new folders. So I'm going to right click and say Add to Quick Access Toolbar. So you can see that I'm building up a catalog of commands that I use frequently and making them super accessible to me. It makes me a lot more efficient when I'm working in Outlook.

Now aside from right clicking and adding to the Quick Access Toolbar if you want to access all of the commands in Outlook and if you remember I said not all of them are available on the ribbons, you can click this dropdown and you could go down to More Commands. Now this essentially jumps you into the Outlook Options, which we looked briefly at when we went into the file or the Backstage area. And it jumps you to the Quick Access Toolbar section of Outlook Options.

Now what you'll see here is that on the righthand side this is what's currently on my Quick Access Toolbar. So you can see Send and Receive, Undo, New Item, Reply, and New Folder. On the left hand side this is where I can choose which commands I want to add to my Quick Access Toolbar. And these commands are all categorized. So currently I'm only displaying the most popular commands in Outlook 2019. Now if I click dropdown you can see here I have one for All Commands and this is going to show me every single command available in Outlook. And there are lots and lots of them. Fortunately they are all listed out in alphabetical order. So if you know what you're looking for you can scroll to that particular part and then add it in.

So let's say I was looking for the Categorize option. So I'm going to scroll down to see and you can see here I have a Categorize option. I'm going to select it and I'm going to say Add. And that adds it to my Quick Access Toolbar. Now I could go through and I could carry on adding different commands. Maybe Collapse the Ribbon, let's add that as well.

Now once I've got all of my commands added I then have some options when it comes to organizing the way these commands are listed. So just on the righthand side here I have up and down arrows, so move up and move down. So maybe I want to move Collapse the Ribbon up a

little bit, or maybe I want my New Mail to be one of the first three and I want Reply to go next to New Mail. Maybe I want Folder up there, maybe Categorize, and Collapse the Ribbon at the end. So you can use these to organize the way your icons display on that Quick Access Toolbar.

Now something else you can add just to make them a little bit more organized is you can add something called a Separator. And at the top of every list you will find a Separator. So I'm going to add Separator in and I'm going to say, and again I'm going to use my up arrow and I'm going to separate off these first four from the other three. I'm going to add another separator and I'm going to move that one down and I'm going to separate Collapse the Ribbon from New Folder and Categorize. Now once you're happy with all of this if we click on OK and take a look at our ribbon you can now see I have those additional commands added, but can you also see those lines? Those are the separators. So it kind of helps you group together commands of similar type. So for me these first four are the ones that I use all the time. I then have some organizational commands and then I have something that's more related to the layout, the way that I'm viewing my Outlook.

So one of the things I would suggest you do when you first open your Outlook is really think about the commands that you use frequently and start adding them into your Quick Access Toolbar.

Hopefully that all made sense to everyone and hopefully you'll find that it also improves your efficiency when you're working in Outlook.

That's it for this module. Please join me for the next one.

Video: Adding an Email Account

Deb: Hello again and welcome back to our course on Outlook 2019. This is Deb and we are still down in section two where we're basically looking at the basics of Outlook 2019.

Now in the previous module we looked at how you can increase your efficiency by adding commands to the Quick Access Toolbar and what I want to do in this module is really show you how to attach an email account to your Outlook. Now you may be wondering what I mean by that. Well, if you cast your eyes over to the left hand side of the screen in the Folder pane you can see that I have my email account attached here. So this is my email address and I have various different folders underneath there. Now it might be that I also want to attach another email account. So if I have a personal account, so maybe something like a Gmail account or another Exchange account or a Hotmail account or something along those lines I can also set that up so I can view those mails in my Outlook. So it's like having numerous different mailboxes which you can access from your Outlook 2019 account. So I really just want to run you through the process. It is very simple and straightforward.

The only pieces of information that you require in order to do this is you need to know the email address of the account that you want to set up. So in my case I'm going to set up my personal account. And you also need to know what email application essentially it uses. So whether it's Gmail, Hotmail, Live, Exchange, whatever it might be. And obviously you need to know your password for the account as well. So let me show you how quick and easy it is to set up another email account in your Outlook.

Now for this we're going to jump into the Backstage area again. So if you can remember back from one of the earlier modules you can also do that when click on the File tab. And this jumps us into our Account Information. You can see here that tab I'm currently on is the Info tab. And the first option we have here is Account Setting. So let's click on that and we want to go into the first one, Account Settings. And you can see that it says there Add and Remove Accounts or Change Existing Connection Setting. So it's also worth noting that you can remove any unwanted accounts that you've added from here as well. So let's click and jump into there.

So in this Account Settings dialog box I have a number of different tabs running across the top. Now the only one I really care about here is this Email tab and currently it's showing me the mailbox that I have attached to my Outlook. And I have a tick by this mailbox because this is my default mailbox.

Now if I wanted to add another mailbox into here all I need to do is click on the New button. Now you can see here that Outlook has picked up an old Outlook email address that I used to use. So it's given me that as my default option as an account that I want to add. Now I actually don't want to add this particular account so I'm going to delete that out and I'm going to type in the name of the account that I do want to add, which is essentially just the email address of my

account. And you can see that this one is a Gmail account. Now we do have some advanced options. You can say let me set up my account manually but wherever possible if I can I like to let Outlook do all the work. So I'm going to say Connect and what it's asking me to do now is to log in to my Google account. So again I'm going to go in with my email address, I'm going to click on Next, and I'm going to type in my password and click Sign In. I get a little warning message there from Google saying that Microsoft is going to have access to my Google account. So I'm going to say that that's fine. I'm going to allow and there we go. It was as easy that. So you can see it says Account successfully added and it's added my Gmail account as an IMAP account.

Now IMAP stands for Internet Message Access Protocol. And what it means is that the emails remain on the email server, so the Gmail server essentially, which allows me to set up this account on multiple computers and devices so that I can access my email, as well as being able to access them through web mail.

You can now see that I have a secondary account added into this list and I can see the type is IMAP, whereas the first one is a Microsoft Exchange account. If I click Close there as well you can see that I now have access to my Gmail account as well. And this can sometimes take a few moments to pull through all of the folders and the emails, depending on how much stuff I should say you have in your email account. So slowly over the next few minutes all of my emails are going to come through. And I can already see that a lot of my folders are automatically being pulled through, which is great.

So now essentially I have access to both of my accounts, which is great. I don't have to flip between my personal and my business accounts.

Now similarly if I wanted to remove that account I can go through the same process. I can go to File, I can go to Account Settings, I can select my account that I've just added, and I can remove it. Now it's saying, Careful. If you remove this account it's offline cache content will be deleted. Now you could take a backup of your account if you wanted to, which just mean exporting out, which we're going to look at later on in this course, but at this moment in time I don't mind. I haven't made any changes so I'm going to say Yes to continue. And you can see very quickly that's now been erased and I'm just left with my original account.

So hopefully that's shown you how easy it is to combine multiple accounts into your Outlook 2019 account, which makes it super efficient when you do have numerous different mail accounts that you want to manage all in one place.

That's it for this module. I will see you in the next one.

Video: Practice Exercise 01

Deb: Hello everyone and welcome back to our course on Outlook 2019. We've made it down to our first practice exercise and as this is the first one I will briefly explain to you what the format of these practice exercises is.

Now you'll find a practice exercise at the end of every section throughout this course. And each practice exercise will contain a series of tasks which will help you practice the skills that you've learnt in that particular section.

Now I will say there is some leeway on these exercises. You don't necessarily have to perform them exactly as they're written here as some of them will very much depend on what you currently have in your email inbox. However, do try to follow the instructions as closely as possible in order to get the most out of them. So let me run through what I'd like you to do in this first practice exercise.

I'd like you to add four commands of your choice to the Quick Access Toolbar.

I'd also like you to ensure that the Help ribbon is displayed if you can't currently see it in your Outlook.

And if you have an additional email account, so maybe a personal email account I'd like you to practice adding that additional email account into your Outlook account so you can see all of those emails.

So that's it for Practice Exercise 01. See how you get along with that and I will see you in the next section.

Section 3 – Sending and Receiving Mail

Video: Sending and Receiving Mail

Deb: Hello everyone and welcome back to our course on Outlook 2019. We're now down in section three where we're going to be discussing everything surrounding sending and receiving mail. And this is really the entire point of Outlook. The main thing that we're going to be using it for is sending emails to people and also receiving emails from others. However there are a few important points that are worth noting that are specific to Outlook 2019.

So currently I'm clicked on my Inbox folder and you can see there that I have a new mail at the top of the list and this is just one that I've sent to myself from a different account. Now how do I know that this is a new email? Well fairly obviously it's in a different font to the rest of my mail and it's also in bold. And something else I can also see that indicates that I have a new email, which is particular useful if I'm working in a completely different application and don't necessarily have Outlook in front of me at the time, you can see at that in the System tray at the bottom of the screen I have a little envelope icon. So this is indicating to me that I have a new mail or mails.

Now this little envelope icon isn't automatic. It's a setting that you need to turn on so I want to start out just by showing you that where you can customize how you're alerted to the fact that you have a new email.

Now again as you might expect this is one of the Outlook Settings so we're going to jump up into File, we're going to go down to Options and the category we're going to choose is Mail. Now if we scroll down you'll see that we have a little section here for Message Arrival. So it's saying what do you want to happen when a new message arrives? So I can choose to play a sound, I could briefly change the mouse pointer, again that's quite a good one if you're working in a different application. Your mouse pointer will change which will alert you to the fact that you have a new email. And you can see the next one I have ticked, Show an envelope icon in the taskbar. So if you do want that make sure that you have a tick in that box. And you could also say that you want to display a desktop alert which will bring a bigger alert up in the corner of the screen.

Now I'm going to change a couple of these. I'm going to turn off Desktop alert and I'm going to say Play a sound and I'm going to say OK. So I'm going to read this message by double clicking it and I'm going to close it down just so that that's no longer showing as a new message. And you can see that my little envelope icon has disappeared from the system tray. I'm now going to send another email and I want you to see those notification settings in action. And there we go. We have the mail come in. My mail icon is back. So very simple to customize those settings.

Now when it comes to sending or composing a new email message again we can jump up to our Home ribbon where we have our most frequently used commands. Alternatively I could use the New Message button on the Quick Access Toolbar. Now as I hover over that you'll see there is also a keyboard shortcut so I'm going to use that in this case, Control-N to compose a new mail message.

Now the first thing you'll see here is the message says Untitled and it's telling me that it's in HTML format. Now this is important point to note. Mail messages can be sent in HTML format or plain text. Now most of the time HTML is going to be the one that you want to use because that means that any pictures or graphics or formatting that you add to your mail message is going to display correctly. However sometimes, and this isn't so prevalent anymore, if you're dealing with an older email system sometimes you just want all of the fancy stuff, all of the images, graphics, logos, etcetera striped out and you simply want to send your message in plain text. So you can also do that.

And you'll see here if I jump to this Format Text ribbon I can say HTML and it says Format this message as HTML. HTML messages can contain formatting and are compatible with most email readers. We have the Plain Text option. So it says Plain text can be read by everyone but contains no formatting. And then Rich Text messages can contain formatting but are only compatible with Microsoft Outlook and Microsoft Exchange.

Now again this isn't a point that you need to agonize too much over. You'll find that the default most of the time is going to be HTML. But just be aware that if you need to you can change the format of your message.

Now if I jump back to this first ribbon, again on this message ribbon we have most of the things that we're going to utilize most frequently.

Now the first thing you're going to want to do when you're composing a message is you're going to want to select who you're going to send this email message to, and it can be to one or many, many more people. Now obviously you can click in this To field and type in the email address directly. Or alternatively if you have Contacts set up in Outlook, and again this is something we're going to cover a bit later, if you click on the To button you can select a contact from your different address books. So I'm going to click on My Contacts and this shows me all of my particular contacts. So I might want to select Adam, Jasmine and Kirsty and I do a multiple select by holding down my Control key as I click and then when I click on the To button underneath it's going to add all of those email addresses into the To field.

I can also choose if I want to CC anybody. So the way that I think about CC is that you have the main people who this message is going to in the To field and then maybe if someone else needs to know really more for informational purposes you might possibly put them in the CC field. So I'm going to put Marcus in the CC field.

Now you also have an option for BCC or Blind Carbon Copy. And this is if you want to send somebody the mail but you don't want anybody else to be able to see that you've also sent that person this email. So in this case I'm going to BCC Jasmine and click on OK. And it adds all of those email addresses into the relevant fields.

Now if I wanted to add one on the end here manually all I would need to do would be to click on the end, do a semicolon, space, and then I can go ahead and I can type the email address.

I then need to add a subject to my email. So let's say that this is going to be about the summer party and then I can click in the main body of my mail and start to compose my message.

Now there are a whole ton of formatting options that you have when it comes to writing messages. So let me type in a brief message.

So I have my brief message now added into my email. Now that's absolutely fine but currently it's not particularly interesting, not particularly vibrant. It's all the same font, all the same size. So if I want to start formatting this email you'll see that I have a Format Text ribbon. And on this ribbon we have all of our different options when it comes to formatting. And this has improved so much in Outlook over the years. I remember a number of years ago there were some very basic formatting that you could do in your emails but now really it feels a lot more like you're almost working in a Word document as opposed to typing an email, particularly with things that you'll find underneath the Insert ribbon. You can do things like insert tables, pictures, even shapes, icons and 3-D models directly into your email.

So for example, let me just show you one of these. If I press Enter a couple of times to add a bit more interest to this email. I'm going to stay on the Insert ribbon and I'm going to utilize this Icons option we have in the Illustrations group. Now if you've never come across Icons before you will find Icons in all of the Microsoft applications. And they're a really great way of being able to add icons into your documents, emails, spreadsheets, presentations without leaving the application that you're in.

So I'm going to search for an icon related to party and there we go. We get a few of them just here. So I'm going to choose the balloons and I'm going to say Insert. And it inserts that little icon for me.

Now if you remember what I was saying before about contextual ribbons, so those ribbons that only appear as and when they're needed. You can see that now I've inserted this icon and an icon is considered to be a graphic, if you look up at my ribbons now you can see that I have an additional ribbon and it comes under the heading Graphics Tools. We now have this Format ribbon. And all of these options relate to this particular icon. So if I want to change the color of this icon I can go to Graphics Fill and I can change it to a different color. So let's say red. I could even give it a little bit of an outline if I wanted to. So let's give it a black outline, like so. And as

I click away that ribbon disappears. So don't forget all the options you have for inserting different items into your email available on this Insert ribbon.

Now let's go back to Format Text for one moment. Now it might be that I actually want to make the text of all of this email a little bit bigger. So I could click and drag my mouse or alternatively if I click somewhere within my message and press the Control-A keyboard shortcut that's going to highlight all of my text. And I'm now going to go up and I'm going to change the font size. I'm going to make it size 14, like so.

Now some other formatting options I might want to do. I want to make this Bigger and Better text stand out a little bit more. So I'm going to highlight it and I'm actually going to click the little dropdown in the corner here. So you'll see within some of these groups you have a little diagonal arrow and that essentially takes you into some more advanced options for your font formatting. Now I'm going to say I want the words Bigger and Better in all caps. I'm also going to make it bold and I'm going to change the font color to red and click on OK. And there we go. So I have all of my regular font formatting options available in this Font group. And again if you're used to using applications like Word these will be very familiar to you.

We also have our Paragraph options here. So if you want to add bulleted lists, numbered lists, you want to do some aligning, you have all of those options in there as well. So I might want to add something into this email and then I might have a list of tasks. And again I could highlight all of these, go up to my Paragraph group, and add my bullet points like so. So automatically now this email looks a lot more interesting. The key points stand out, I've added some interest with a little bit of an icon and I've also organized my list a little bit better using bullet points. So don't forget about all the different formatting options that you have on the Format Text ribbon and also the Insert ribbon as well.

Now there are so many different options when it comes to sending your message and we're going to go through some of those in the next few modules.

So at this point probably what I'm going to want to do is once I've read it over is I'm probably going to want to run a spellcheck. So I'm going to go to the Review tab, I'm going to say Spelling and Grammar and it's telling me I've got no spelling errors, which is very rare for me but I'm going to say OK. And I'm going to determine that I'm pretty much happy with this email. I am ready to send it.

Now what if I got halfway through this email and maybe got called off to a different task or maybe I had to go out to a meeting or to lunch and I didn't just want to leave this message open on my screen. What I could do is save my message as a draft. So again up on my Quick Access Toolbar I have a Save option, Control-S. So I'm going to say Save and I'm going to close this message down. And what happens to that message is although it appears to have disappeared you'll see now that in my Folder pane in the Drafts folder it's showing me that I have one mail. So when I click on my Drafts folder there is my email. So if you just click Save and close the

message it's going to be saved into your Drafts folder. You can jump in there, reopen it, continue with your message, and then when you're ready you can click Send.

Now you can see that because I was copied in on that email I now have a new mail message. You can see the icon down in my system tray. And you can also see that my inbox has gone up to two unread messages.

If you want to view all of the messages that you've sent, if you click on the Sent Items folder you can see in there all of the messages that you've sent through. So a very simple process to receive messages and also to send them.

That's it for this module. I will see you in the next one.

Video: Focused Inbox

Deb: Hello again and welcome back to our course on Outlook 2019. We're still down in section three where we've been looking at sending and receiving emails. And in this very, very quick module I really just want to showcase to you one of the newer features that you'll find in Outlook. And this is a feature again which came in in around Outlook 2016 I believe it was. It may have been there in 2013, I can't quite remember, and that is something called the Focused Inbox.

Now if you are anything like me your emails are probably overflowing in your inbox most of the time. And the Focused Inbox is a feature that's been introduced to reduce the noise and enable you to focus only on those most important messages. And the way it works is that Focused Inbox is a feature that essentially uses machine learning to control the overflow of emails by analyzing incoming messages and based on the contents placing the most important emails in the Focused tab and assigning everything else to the Other tab. Now if you're wondering what I'm talking about, if you look just above my list of emails you can see I have Focused and Other. And currently I'm clicked on Focused because it's showing in blue font and it has that line underneath.

So essentially when you receive an email Outlook is going to analyze the contents of that email to determine if that is an important email for you. And it's also going to learn from your actions as well. So for example, if you get a newsletter every single week and maybe you signed up for this newsletter a year ago and you delete that email every single week without reading it Outlook is going to analyze your behavior so that when you receive that email next it knows that you always delete this message and it's going to put it in the Other tab because it's not going to deem it as an important message. So what Outlook is trying to do here is to really just help you focus on the most important emails.

Now this can be a really useful feature and can really help you manage the amount of noise and clutter that you have in your email inbox. And it is very easy to switch between Focused Inbox, so all of your important emails and anything that you have in Other. Now I don't have anything in here at the moment, but if you did your emails would be listed underneath there. So that's kind of what it is.

Now if you're somebody who doesn't particularly like that feature, I know a lot of people get a little bit nervous when they think that their computer is kind of analyzing their emails and deciding for them which folder emails should go into, deciding for them which emails are important. And I 100% understand that train of thought. So if you're not someone who likes that and you want to get rid of Focused Inbox altogether and just have all your emails coming into your inbox it's very simple to turn off.

If you jump up to the View ribbon you can see we have a little group there called Focused Inbox and currently because I have mine turned on the icon is showing in gray. And all I need to do to turn it off is click on the button again and you can now see that that changes. I no longer have Focused and Other. I just have all emails and any that are currently unread. So again, entirely up to you if you like or dislike that feature.

You would also find this feature in Outlook on the web. So if you have an Office 365 account and you access your Outlook mail through there you'll find that you do have the Focused Inbox option as well, which again you can turn off or on depending on what your personal preference is.

So that's it on this module. Really, really quick little module just to explain to you that new feature. I hope you enjoyed that. Please join me in the next module.

Video: Customizing the Inbox

Deb: Hello again and welcome back to our course Outlook 2019. In this module we're going to take a little bit of a further look at customizing our inbox and really setting it up so that it suits how we work. And there are a whole host of features available in Outlook to help you with this and I'm going to run through some of them now and then we're going to look at more of them as we go through the following modules.

Now the first thing that we're going to do here is we're going to jump up to the View ribbon because this is the ribbon where you'll find a lot of the commands which are really going to help you customize the way that you're viewing your emails and the way that you're looking at your inbox.

Now the first group that we have here, which says Current View, this is where we can change the types of columns that we're seeing so we can make changes. So the first group we have there is related to how we're viewing our inbox. So currently the information that I can see when I'm looking at my emails in my inbox is I can see who it's from, the subject, when it was received, the size, categories, mentions, and flags. Now all of those column headings can be changed. So you can really tailor the type of information that you want to see when you're looking at your emails. I'm going to cover how you change your views and add columns in a later module.

Now in this module I'm going to start out with showing you this little option just here in the next group along and that is this Show As Conversations option. And you'll see as I hover over I get the screen tip and it says Show me my messages arranged by conversation. So what exactly does that mean? Well currently I do not have this option turned on. And when I'm looking at my emails I can see every single individual email. So if we take the email that I currently am clicked on as an example this is an email that's gone back and forth between myself and the recipient and I've had a couple of replies to this email. Now when I don't have the Show As Conversations option checked I can see every email. So every reply I receive to this email is going to show as a separate email in my inbox. Now it might be that you like it set up this way but let me just show you an alternative. And the alternative is utilizing this Show As Conversations option.

So if I put a tick in this box it will ask me, Do I want to apply this setting to just this folder or my entire mailbox? So in this case I'm going to say just this folder and you can see what it essentially does is it groups all of those email replies together. So effectively I now have this little collapse and expand button. So if I collapse it back up I can just see one email, but if I click it it's going to show me all of the replies underneath to that email. So it really helps me declutter my inbox by keeping all of the same conversation together and I can choose whether I want to collapse that or expand that up. And of course the one thing it's probably worth noting here is that you need to remember that you've done that otherwise you might think you only have one

email and forget that you can actually expand to see all of the emails underneath. So that's a little feature that can really help you declutter your mailbox and keep all mail conversations together.

And of course if you want to turn it off just take the tick out of that box, apply it to this folder and your emails will be listed separately again.

Moving along we've already discussed in the previous module what Show Focused Inbox does so let's move on to our next option which is Message Preview. Now I currently have this turned off but if you wanted to you could display a short preview of the email message. So if I was to say let's go for the maximum here, three lines, and I'm going to say Apply to this folder, it's going to show me the first three lines of all of my emails. Now again some people like this, some people find this a little bit messy looking. And you do have a couple of other options in there. So I could say one instead which makes it slightly neater. Now I actually prefer to have mine turned off but just be aware that you have those options which you can customize as well.

Moving along to this Arrangement group. This is essentially how you prefer to have your mail sorted in your inbox. So I like to have mine in general sorted by date, so date received. The most recent at the top. And you can see there that I have Date selected. But if you wanted to you could choose any of these to group them by. So if I wanted to sort them in alphabetical order by the senders name I could click From and it's going to organize my emails in a slightly different way. Now I'm going to put mine back onto Date.

And the other thing you might notice within your inbox is that I currently have mine grouped. So it's telling me, so I have these little headings here and again these are collapsible and expandable but you can see that I have all of the emails I've received today grouped together under the Today heading, the email I received on Wednesday and then any that are older underneath. And you can change that option again by clicking in this Arrangement group and just unticking that Show in Groups and that will get rid of those headings and just give you a very plain, basic email list. So again that is personal preference.

Now a couple of other things on this View ribbon which don't relate specifically to the columns, which we're going to look at later, are in this Layout group. So again Folder pane. Now when we say Folder Pane we're talking about this area on the left hand side, so where you can see my mailbox and all of my folders. So Inbox, Drafts, Sent Items, so on and so forth.

Now you can customize this. I have mine set to normal and I'm also choosing to show any favorite folders at the top. And you can see here it says Drag your favorite folders here. So I haven't done that yet because that's something I want to show you how to do later in the course, but I do like to make sure I have that option turned on so that I have that little favorite folders area at the top of my list.

Now the other options I have here, I could say Minimize for my Folder pane. It will essentially collapse up that larger Folder pane and just give me access to my icons running down the side. If

I go back to Folder pane and say Off entirely it's going to get rid of the whole thing. So sometimes this can be useful if you want a little bit more space on your screen to work with to get rid of that Folder pane. But I think in general most people are probably going to want to see that Folder pane so we set it back to normal.

We also have some further options in here and we have some further navigation options. So underneath here it's saying Maximum number of visible items is set to seven. And again you can change that using these little up and down arrows, but this relates to many items you're seeing running across the bottom here. So where we have our icons for Mail, Calendar, People, so on and so forth. And you can also see that I have Compact Navigation selected, which is why I see these as icons. If I was to remove the tick from this box and click on OK you'll see that those icons will change to actual words and it takes up a lot more room on your screen than those smaller icons. But again sometimes people prefer to set their Outlook up this way. Now I'm going to jump back into Options and I'm going to turn back on my compact navigation.

And then the final thing I can do is change the order that I'm displaying these items. So you can see that I have Mail, Calendar, People, Tasks, Notes, Folder, Shortcuts and you can see that reflected at the bottom of the screen, Mail, Calendar, People, Tasks, so on and so forth. Now if I wanted to change that order around I can definitely do that. I can click on an item and choose to move it up or move it down. So it might be that I want to put my Shortcuts before Folders and then when I click on OK you'll see that those changes I've made take effect. So I change them back to icons and I also now have my Shortcuts before my Folders. So a few different options you can customize in there as well.

Let's jump across to the Reading pane. Now you'll currently see in here that I have my Reading pane turned off. Now what that means is that in order to read the email message I need to open the email message. So let's take this email from Jamie as an example. I need to double click on it in order to open that email and read it. However if I turn on my Reading pane I don't need to double click to open the email in order to be able to see the contents. So again if I go back up to Reading pane and I say Bottom you can see it gives me this Reading pane. So whichever email I'm currently clicked on, so again it's the one from Jamie, I can actually see that without opening the email in itself. If I don't like it running across the bottom I could choose to put it on the righthand side. So again this is very much personal preference as to which method you prefer.

Now if we go back up to Reading pane again because there are some further options with regards to this. So you can also set up if you want to mark items as read when they're viewed in the Reading pane. So if you remember if we have a new email, like this one just here that I haven't yet read, Summer Party, if I choose to mark the item as read when viewed in the Reading pane it means that as soon as I click on this email and it displays in the Reading pane it's going to turn into an unread email. If you don't have a tick in that box it means that even when you click on it and read it in the Reading pane it's still going to show as unread in your list. So again entirely up to you which one you prefer.

And again underneath there you have a few other options when it comes to selecting emails and whether they're marked as read or unread. So it's worth definitely taking a look in here, reviewing it and setting it up how you would prefer.

Moving along we also have something called the To Do bar. Now currently I don't have this displaying but I could choose to select my calendar and what that's going to do is it's going to pop open this To Do bar on the righthand side of the screen and it's going to show me a little mini preview of my calendar. Now I will say that this is really, really helpful because I know a lot of the time when I'm working I might be reading a mail, maybe it's got something to do with a meeting, and I want to consult my calendar but I don't necessarily want to jump out of my email and switch to my calendar application because the email then disappears. So I find it quite useful to have the To Do pane open and a little mini preview of my calendar just here. And if you have anything scheduled in your calendar then it will show underneath here all of your appointments and your meetings.

Now if we jump back to that To Do bar you can see you can show other things in here as well. So I can show People as well. And you'll notice that because I'm displaying People it's also still showing my calendar. So I could have all three showing if I wanted to. So it's going to show me any people that I have added as favorites for quick access and also any tasks I have coming up in my To Do list. Now you might be thinking to yourself with all of these panes open it starts to look a little bit busy. So this is where you might want to start rejigging how you view your Reading pane. So I might choose to have that running across the bottom instead. And you can always adjust this Reading pane by hovering your mouse over the dividing line until you get those arrows and dragging it up and down. So maybe I just want a bit of my Reading pane showing. I can do the same with the To Do bar. I can drag it over to make it a little bit thinner to give my emails a little bit more room. And the same with my Folder pane as well. So you can really kind of organize what you're seeing on your screen so that it suits you and your setup.

Now a couple of other things I want to mention before we finish up this module is there's some setting in the Backstage area related to mail and also the general look and feel of your Outlook that you might want to consider changing. So let's jump up to File which takes us into our Backstage area and I'm going to go down to Options.

So the first two tabs are really the ones that I'm interested in here. So we're currently clicked on the General tab and I'm not going to go through every single option. I'm just going to highlight a couple that I feel you might want to change.

Now in this first section here, User Interface Options, I have ticks in Show mini toolbar on selection and Enable live preview. Now your mini toolbar is a little toolbar that pops up when you select text. So let me show you an example of the mini toolbar just so you're clear as to what I'm talking about. If I just Cancel out of here for one moment and create a new email message. If I was to type Hello and that's all I'm going to put in here, but if I was to select this piece of text,

so I'm going to double click, you will see just above I get the mini toolbar. So this makes it super easy for me to access my text formatting options. So this little popup is your mini toolbar. Now if you find that particularly annoying then you can turn it off. And that is exactly what this little option is in the General setting. So if you don't like it you can take a tick out of this box.

And again with Enable live preview this shows you a preview of how a feature affects the document as you hover over different choices. So again if we take the example of a piece of text that I want to change, if I highlight the text and then maybe I want to change the font that I'm using, when I go up to my font and hover my mouse over the different font types, whether that be Arial or Calibri or Times New Roman as I hover over the font in my email is going to change depending on which one I'm currently hovered over. I don't have to select it. It's just giving me a preview prior to selection. And that is what we call a live preview. And again I find that super useful so I like to have mine turned on.

And I also like to have my screen tip styles to show the feature descriptions in screen tips. So that is when you hover over any command on your ribbon and that little box pops up with a description of what that command does. And you've seen that numerous times as we've been going through these modules.

And finally down here it says Personalize your copy of Microsoft Office. And you can see that I have my username in there and my initials. And then underneath I have the background that I'm using. So again I can change it to something different, so let's say Circle and Stripes and I can change my Office Theme. So just for demonstration purposes I'm going to say Dark Gray and when I click on OK you can see that both of those have been applied. So right up in the top corner I have my circle and stripes design and my Outlook has changed to this dark gray color. And there are a few different color options in there. You have dark gray, you have colorful which is what mine was on before, you also have black and white. Now I'm going to change mine back to colorful and I'm going to say OK.

So that is pretty much it. We've started to customize our inbox and utilize some of those features available on the View ribbon and also available in the Backstage area.

In the next module we're going to start to talk about attachments, specifically how you can save them, so please join me for that.

Video: Saving Attachments

Deb: Hello again and welcome back to our course on Outlook 2019. In this module I really want to focus in on the topic of saving attachments.

Now one of the most common things to receive in Outlook in your mail is some kind of document. That might be a Word document, a spreadsheet, or some other kind of file. And a lot of the time with the documents that we are sent we might want to save those documents off to either our local drives or maybe cloud storage. So in my case I utilize OneDrive cloud storage so I like to save a lot of my documents off to that. So I just want to show you a few different methods of easily being able to save documents that have been sent to you as attachments in emails.

Now you'll see currently I'm clicked on an email from Marcus and I know that this email has an attachment because I can see that little paperclip icon next to his name. Now when I view that email in my Reading pane towards the bottom I can see that I have an Excel spreadsheet attached to it called Sales Budget.xlsx. And I want to save this off to my cloud storage, to OneDrive. Now there are a few different methods of doing this so I'm going to show them all to you and you can choose which one suits you the most.

Probably one of the easiest ways and most obvious ways is that when I hover over this attachment in the Outlook email I have this little dropdown arrow and if I click it I have an option to Save As or Save All Attachments. Now if I had more than one attachment in this email Save All Attachments would allow me to save them all at the same time. But I could still utilize this option even if I just have one, so let's do that. And you can see it's telling me that I have one attachment, Sales Budget. I'm going to say OK. It's going to open up my local drives and I can then navigate to a folder where I want to save this document. So I'm going to save this in my email attachments folder by double clicking. I can see it's called Sales Budget. Now I'm going to say this is going to be called Sales Budget 01 because we're going to save this a few times. And I'm going to say Save. And if I now pull up my File Explorer I can see my attachment nicely saved off into that folder. So that's one method, by clicking that dropdown arrow next to the attachment.

Another method, which is even quicker, is to drag and drop. And I particularly like this method if I have lots of emails that I want to save off in completely different emails. Now the way that I do this just to make it a little bit more efficient for myself is I utilize the side by side feature in Windows 10 and this works from I think it's Windows 7 onwards. So I'm just going to pick up my Outlook window and I'm going to drag it all the way over to the left hand side of the screen until I see that ghosting. And when I let go it fills one half of the screen and I can select File Explorer to fill the other half of the screen. So I can see both at the same time. So now if I want to save this Sales Budget all I need to do is click it, drag and drop. And there we go.

Straightaway it's moved it across to that folder. So a super quick way of saving off your attachments. And I'm just going to click on Maximize to bring my Outlook back.

Now let's select that email from Marcus again and let me show you a third way. You could if wanted to go up to File and you have a Save Attachments button in here as well. And again it's going to pick up the attachment, click on OK, you can select your folder so it's defaulted to the correct folder and I'm going to call this Sales Budget 03, click Save, and it saves it across.

So three very simple methods there when it comes to saving off attachments to your cloud storage. And again if you prefer to put them on your desktop or in a local folder that's absolutely fine. The method is exactly the same. You just select your desktop instead of your cloud storage folders.

That's it for this module. In the next module we're going to talk a little bit more about customizing those columns and views so please join me for that.

Video: Customizing Mail Views

Deb: Hello again and welcome back to our course on Outlook 2019. This is Deb and we're still down in section three and in this module I'm going to talk to you about adjusting or changing these column headings. So essentially changing the information that you can see for each of your emails. Now when I say column headings, as I've stated before, what I actually mean are these things up here. So where it says From, Subject, Received, Size, Categories, Mentions, and then we have our flags at the end. So it's showing me the flag status on these emails. And at the beginning we have some icons as well. So I have a column here for Important. So if any of my emails are marked as high importance I would see that in this column. I can see reminders, I get to see the icons. So when I've replied to a message I get this little mail icon with an arrow, and I also have an attachments column. So that's showing me which of my emails have an attachment with this safety pin icon. So essentially I have quite a few columns applied to this view of my email. And this is my current view. It's my default view. Now depending on the information that's important to you and the information that you like to see you may wish to change the way that this is organized. And that's what I want to explore in this particular module.

Now you'll find the tools to do this up on your View ribbon, which is where I'm currently clicked, and you'll see this first group it says Current View. And what I want to do is I want to make some changes to these column headings so I'm going to jump straight into View Settings. And this is really going to allow me to customize every element of my current view. And the first one there is Columns so let's click and see what we have in there.

Now on the righthand side it's showing me what columns I currently have applied to my view. So Importance Reminder, Icon, Attachment, From, Subject, so on and so forth. So these are all of the columns I currently have displayed. Then on the left hand side I have the available columns that I can add and currently I'm displaying the frequently used fields. I do have other options in here. So I could choose to say All Mail Fields which will give me a much more comprehensive list of everything that I could use as column heading. So I'm going to make some changes in here.

Now most of these I tend to want to keep in my mail view. So importance Reminder, Icon, Attachment, From, Subject, Received, and Size are probably the ones that I like to see, but I'm not too fussed about these bottom three, Categories, Mentions, and Flag Status. So I'm going to select Categories, click on the Remove button and I'm going to do the same for the other two. So click on Mention, Remove, and also remove Flag Status. And what I could then I could replace them with something else. So maybe I want to see who has bee CC'd in its own separate column. So I'm going to select CC, I'm going to click on Add and that adds it. Now again I could reorganize these items in the column as well to just change the order which they appear. Now CC I am going to want put that after From. So I'm going to say move up so it appears after the From column. So I've just made a couple of minor changes there. Of course you could go through and add as many of these as you like. And I'm going to click on OK and I'm going to click OK again

just so you can see those changes in action. And there we go. So you can now see From, CC, Subject, Received, and Size and those columns I removed on the end have now disappeared.

Now again there's some weird spacing going on in here so I can always reorganize my view by dragging these column headings. So I'm going to drag CC out a little bit, I'm going to make Subject a little bit smaller and then I'm going to have Received and Size. Let's make From a little bit bigger. There we go. So because I have reduced some of those columns my email is starting to look a lot cleaner.

Now if I'm really happy with this view and I want this view applied to all of my folders, so what I mean by that is if I was to jump to my Sent Items folder you'll see that that view or those changes that I've made don't apply to any other folders apart from the Inbox. You can see here I still have Categories, Mentions and Flags in here. So if I jump back to Inbox what I want to do is I want to save this view and I want to apply it to all of my folders. So this time I'm going to up to Change View and I'm going to say Save current view as a new view. And I'm going to call this Deb's View. And I want to say that it can be used on all mail and post folders and click on OK. Now once I've don't that it still doesn't apply it to my other folders. I've just saved that view. So that if I make any further changes I can always revert back to my view. So if I want to apply this view to my other folders, if I click on Change View again I can say Apply current view to other mail folders. So I'm going to expand my mailbox and I'm going to say I want to apply it to all of my inbox folders, basically everything that I have. And I'm going to say Apply View to Subfolders and click on OK. So now when I click on my Sent Items you'll see that that view has been applied across everything.

Now it might be the case that you choose to set up lots of different views and name them all different things. So if you want to manage or make any changes to the views that you've created, if you go up to Change View and go down to Manage Views. Now you'll see in this list in this table we have Compact, Single and Preview. Now these are Outlooks inbuilt views that you can use, they're default views, and then at the bottom we have the view that I just created. So if I want to make any changes to this I select it and click on the Modify button and that will allow me to jump back into columns and I can go in and I can change more of this information if I wanted to. So I'm actually going to add another column into my view. So I'm going to add Categories back in and click on OK and OK again and I'm going to say Apply View. And now on the end here I have my Categories column.

Now remember if you do make a change to a current view, again it's not going to be automatically applied to your other folders. So whilst I can see the Categories column in Inbox if I jump to Sent Items it's still showing me my view without that Categories column. So essentially what I would need to do would be go up to Change View and now save this view with the additional Categories column as a new view. I'm just going to say Deb's Cat View and click on OK and now I can apply that view to all of my other mail folders, including my subfolders.

So essentially every time you make a change and you save as a new view it's going to add it into your Manage Views area and you could switch between those views if you wanted to. So if I wanted to go back to the view to prior that adding that Categories column I can select Deb's View and I can say Apply View and there we go. So it might be that you're 100% happy with the default view that Outlook gives you and that is absolutely fine but if you do find that you're wanting to have different information displayed for your emails then creating a new view and customizing those columns is definitely a way that you can do that.

Now one other thing I wan to point out in here, if we go into Manage Views and I'm going to select Deb's Category View. I'm going to go into Modify. Now columns isn't the only thing that we can modify. I can also choose how I want to group my emails. Now I have mine set up to automatically group according to arrangement. So you can see above on the View ribbon in the Arrangement group I have my emails organized by date. So currently all of my emails will show with the latest date at the top. I could customize that by unticking and saying I want to group them by recipient name, then by attachments and I could carry on going. So let's do one more. Let's say then by created. And I can choose if I want that in ascending or descending order. Now I'm going to put all of mine to ascending. I'm going to say OK. I can then choose how I want them to be sorted. So when I receive an email currently I have them sorted in descending order. So I could choose that all received items go in ascending order.

Now the other settings that we have in here where we have Filter other conditional formatting and Format columns I'm going to discuss in later modules. So for the time being I'm happy with those customizations I've made to these top three. I'm going to say OK and I'm going to say Apply View. And you can see now that my emails are organized in a completely different way because of that sorting that I did. And again this might not be something that you particularly like but it's definitely worth having a play around with so you can get your inbox organized in a way that suits you.

Now I'm going to go back to Change View, Manage Views and I'm going to apply Deb's View. And that takes me back to what I had right at the beginning.

So hopefully that's given you a bit of a clearer idea as to how you can customize the way that you're viewing your emails in your Outlook inbox.

So that's it on section three. We're now moving into section four where we're going to talk all about searching for emails in your inbox and other folders so please join me for that.

Video: Practice Exercise 02

Deb: Hello everyone and welcome back to our course on Outlook 2019. We're now down to Practice Exercise 02 where we're going to practice the skills that we've learnt in this section.

So the first thing I'd like you to do is to create a brand new email message and just address it to yourself. I'd like you to add a subject line of Hello World and I'd like you to type a message of your choice and just practice formatting the text. So you might want to make some text bold, you might want to change the font style or maybe the font color. You might also want to add some kind of list and practice utilizing bullet points or numbered lists.

Once you have your nicely formatted email I want you to save the message as a draft. I'd then like you to turn on the Reading pane and display it across the bottom of your emails. I want you to group your emails by conversation and if you have it turned on already I'd like you to turn off the Focused Inbox feature.

Finally I'd like you to customize your view for your inbox only and add in the Category, Mentions and Flag Status columns.

So quite a few different tasks for you to carry out there. I have confidence that you will complete these successfully. See how you get along with that and I will see you in the next section.

Section 4 – Searching Mail

Video: Searching Mail

Deb: Hello everyone and welcome back to our course on Outlook 2019. We've made it all the way down to section four where we're going to start exploring the wonderful world of searching for emails in your inbox.

Now if you're anything like me my inbox is normally completely overflowing and I tend to keep most things. I really dislike deleting items, which is fine but sometimes it makes it a little bit difficult to find the items that I'm looking for if I'm trying to dig out an old email and I can only remember something tiny about that email. So this is where search in Microsoft Outlook comes in really handy. So let's take a look at some of the options that we have for searching.

Now your Search bar in Outlook is located just above your email list, so just here where it says Search current mailbox. And we have a free text field here where we can type in our search term. And then next to that we have our scope, so where are we searching. So I currently have Current Mailbox. Now what that means, it's going to search every single folder in my train@debashby mailbox. So all of these folders listed underneath will be included as part of the current mailbox. If I was to select subfolders that's purely going to search in any subfolders that I have based on the folder I'm currently clicked on. So I'm currently clicked on my Inbox and I haven't actually created any subfolders yet, but if I had, maybe I've got 20 or 25 subfolders, selecting the Subfolders options will search through my inbox and all of its subfolders. I can choose Current Folder. So again if I'm clicked on maybe one subfolder I can choose search specifically in there. I could search across all mailboxes. So saw earlier how I managed to add my personal account into my Outlook. I've actually removed it again. But if you have multiple mailboxes attached to your Outlook account you can search across them all. So it's like a universal search across all of your mailboxes that you have attached.

And the final one here is All Outlook Items. Now what that means is that it will search for whatever keyword you've typed in across everything in Outlook, not just specific to mail. So it will search across your calendar, across your contacts, your notes, your tasks, so on and so forth. So don't forget about that on the end there. You really need to specify the scope in order to get the most out of your search results. Now I'm going to keep mine on Current Mailbox. I don't currently really have a great deal in here so I'm fine to do that.

Now one thing you'll notice is that as soon as I click in this free text field to type in my search terms you'll see that I get a contextual ribbon pop up. Remember, they only appear when we need them. So Outlook has determined that because of where I'm clicked I'm about to do a search and its popped up my Search contextual ribbon. And this really helps me refine what I'm searching for. And we're going to dip in and dip out of some of these options.

Now one thing you'll see that's highlighted on this Search ribbon is Current Mailbox. So that has picked that up from the scope that I've selected in this dropdown on the righthand side.

Now the first search I'm going to do is a fairly simple one. I'm just going to type in a keyword and see what emails it brings up. So I'm going to type in Excel. Now you'll see that I haven't even had to press the Enter key. It automatically just does the search as I start typing. And it's pulled back four emails. All of them contain the word Excel and that word is highlighted in the email. So really simple just to do a keyword search.

Now something else that I can do in here is I can search for two different keywords, or more than that. So say I want to search for the words Excel or Training. All I need to do is type in Excel, space, Or Training and now it pulls back all emails that contain the word Excel or contain the word Training. And I could carry on going further. So I could say Or Sales and it will pull back a lot more. Alternatively, so I'm just going to highlight and press my Delete key, I could say Excel, which will pull back those initial four emails that contain the word Excel, And Training. So now I only have three emails that contain both of those words. I could say And Sales and now I have no matches. So don't forget that you can combine keywords together using those And or Or switches. So that's one way that you can search in your email specifically for keywords.

Now I'm going to click the cross to close the search down and we're going to start again. Let's jump up and click in our Search Current Mailbox to get our contextual ribbon back and let's look at some of these refine options that we have on this ribbon.

So you can see here I can refine my results by From, Subject, Has Attachment, Categories, so on and so forth. So if I click on From you can see in the Search field here it puts the word From and then it's inviting me to type in a senders name. From Jamie and it pulls back Jamie's email. I can clear that search once more. I could choose to search by subject. So again Subject, I could type in a keyword. So I'm going to say Subject Sales and it pulls back all of the emails that have Sales in the subject line.

Now this has produced quite a long list so I could then go through and refine that a little further. So if I was looking for an email that has Sales in the subject line but also has an attachment I can then say Has Attachments and it adds that criteria to my search terms. So now I'm only seeing emails with Sales in the subject line which have an attachment. And I can see that indicated by the safety pin icon. I could then refine my search even further if I wanted to by specifying a date range. So maybe I'm looking for a mail that was sent today or yesterday or last week and I can go through and I can select one of these options. So let's say Last Month and it's going to refine that. So straightaway its pinpointed one email that meets all of those conditions, Sales in the subject line, has an attachment and was sent last month. And you can see in here you have lots of other options. So if you've applied Categories to your email you can search by the categories that you've applied. If you've got items flagged or if you have things marked as important you can utilize all of these to really refine that search down.

There is also a More dropdown just here and you have a whole host of different options. So if I was looking for a keyword within the body of an email I have an option for that as well. So let me get rid of all of the options that I've put in there so far. I'm going to click back in my Search, I'm going to go to More, and I'm going to say Body. So I'm going to type in the word Review in the Body field and there we go. It's pulled back all of those emails.

Now another option that's really useful here is to utilize recent searches. So when you click the Recent Searches dropdown it's going to show you the last ten or so searches that you performed on your mailbox or folders. So if I want to backtrack and just run a search and pull up everything that has the word Excel in it I can go back to the very first search I performed and select Excel and it's going to pull that list back. So remember this constantly updates as you do new searches, but that's a very, very useful option to find items you were looking for previously.

Now the final thing I'm going to highlight on here is this Search Tools section as well. So if we go down to Locations to Search you can see its essentially searching the two mailboxes that I have. So I have one of my old Outlook data files in here and also my current mailbox. Now what I have underneath is an Advanced Find. And what you'll find is that a lot of these options are similar to the ones that you have in this Refine group. But again you can type into here keywords, you can choose where you're searching, so in the Subject Only, in the Subject field and message body, or in your Frequently used text fields. You can search for particular sender or who it was sent to, you can define things like only searching for mail where you were the only person in the To line. So if it was just sent to you as opposed to having lots of other people copied in you can refine your search by that as well.

And we have two more tabs up here with loads more search choices. So you might want to say you want to search for only items that are currently unread, only items with one or more attachments or no attachments, you might want to search by importance. Now we haven't covered this yet, we haven't marked an email as important but when you do you can search for normal, high or low importance, you can search for items which have been flagged by you. So again when we start adding flags to emails we can run some of these searches or you can say Match Case. So for example, I could type in Excel in capital letters and it's only going to find emails where it exactly matches that case, so only where I have the word Excel in capital letters. It won't pull back any items that have Excel in lowercase. So numerous different options for you to explore in there as well, if you want a bit of a deeper dive on your searching.

And then finally we have an Advance tab where you can start doing some really fancy things like adding in fields. So you can essentially construct your own search. So let me just briefly show you this.

If I go down to this Field dropdown, I'm going to say Frequently Used Fields and that I want to search on the Subject. And it says Subject contains and I'm going to say Excel. Then once I've typed that in I select Add to list and it's going to move it above and I can then go through and

build up some more fields. So I'm searching for emails where the subject is Excel and I'm going to say Address Fields and I want to search for emails from Jamie, Add to list, and I could go on building up my search criteria. Then I could say Find Now and there we go. Below it's now found that one email from Jamie that contains the word Excel in the subject. And if I want to search again I can say New Search and it says This will clear your current search which I'm okay with and I can go back and add in more criteria. So you have some advanced find options lurking underneath Search Tools as well.

And don't forget if you want to clear your current search results you just need to click on the cross or click on Close Search on the contextual ribbon and that will pull all of your emails back.

So that's the basics of how you search in your Outlook Inbox and across all of your other inboxes and folders. In the next module I'm going to show you how you can create something called a Search Folder, which is greatly going to increase your efficiency when looking for mails in Outlook, so please join me for that.

Video: Creating Search Folders

Deb: Hello again and welcome back to our course on Outlook 2019. In this section we've been looking at searching and in the previous module I showed you a few different techniques, different ways and things that you can utilize within Outlook to really zero in on the mails that you want to find. In this module I want to talk to you about how to use Search Folders because search folders can be a way of helping you run searches that you run on a frequent basis with the most efficiency. Now the best way for me to explain this to you is really just to show you.

So if you do want to create a new search folder you need to jump up to the Folder ribbon and you'll see the second option we have there is New Search Folder, keyboard shortcut Control-Shift-P. And if we just read the screen tip just there it says A search folder displays messages based on a specified criteria. Some examples of search folders include all messages flagged for follow up and unread mail. So let's click on New Search Folder.

Now what I'm given here is a list of criteria that I could specify for my search folder. So maybe on a very frequent basis I like to see just the mails that are unread in my mailbox. And the top option there is Unread Mail. So I'm going to say OK. Now what will happen here is it will run that search. So you can see now it's showing me all of the messages that I have unread but also if you look over to my Folder pane you'll see now at the bottom I have a folder that says Search Folders and it's showing me unread mail. So it's automatically created a folder for me that will stay there in my Outlook. Now if I wanted to I could right click on here and I could rename that folder. So if it has a bit of a strange name or you want to call it something else you can definitely do that. In this case I'm fairly happy with Unread Mail. That is meaningful enough to me.

Now when I click back on my Inbox, which is going to pull back all of my mail, you can see that that Unread Mail folder is still there at the bottom. So if at any point when I'm working I want to jump back in and check my unread mail all I need to do is click on the Search folder to see that.

So that is the first example of a very simple search folder. Let's do another one. I'm going to go back up to Folder, New Search Folder. Now what about if I'm always very interested in mail coming from Marcus? So I could say create a search folder for mail from specific people. Now underneath it says Show mail from these people. So if I click on Choose it's going to jump me to my Outlook Address Book. Now currently it's displaying my global address list. Now I want to see just my contacts so I'm going to go to Contacts, I'm going to select Marcus and make sure he is in that From field, and click on OK. So now when I click OK it's going to run a search for all mail specifically from Marcus and create a search folder based on that criteria. And there we go. I can see that I have four emails from Marcus and I can see my search folder has been created. Now in this case I don't particularly like the name of that search folder. It's very long. It's got Marcus's whole email address in there. So again I could right click and say Rename Folder. Alternatively if I jump up to my Folder ribbon you can see I have a Rename Folder option up there as well. So I'm just going to say Marcus Mail. And again if at any point I'm working away

in my inbox if I want to see all the mail from Marcus I can just click on that search folder and it reruns that search.

So hopefully you can see as we're going through these simple examples the benefits of creating your own search folders. Let's do another one. New Search Folder.

Now one that I find quite useful to have is this large mail search folder. As we work more and more with Outlook sometimes we're receiving mails that are really large in size. So they might have multiple attachments, they might contain things like PowerPoint presentations that have loads and loads of graphics in them, things like that. And sometimes it's good to run a search on all of your emails, particularly if you're trying to do some housekeeping to search for all of your mails that are very large in size. So I always like to have a large mail search folder. And I can choose the size of the mail. So currently I'm saying Show mail at least this large, 100K. But if I wanted to I could go in and I could modify that. Now in this example I'm just going to keep it at that. I'm going to say OK and it creates me a large mail folder. So again I might want to rename this folder and just say Large Mail. So it's a great way of if you find that your Outlook is starting to fill up or maybe your IT admin has come to you and said you need to archive some emails, if you want to quickly find your emails that are the largest in size that is a great search folder to have access to.

Let's do another one. Up to New Search Folder and this time we're going to jump down to the bottom because right at the bottom we can create our own custom search folder. And it says to specify the criteria click on Choose. And it's asking me for the name of my search folder. So I'm going to say Deb's Custom and I'm then going to specify my criteria. And this takes me back to the Search Folder Criteria dialog box. And we looked at this in the previous module, so this shouldn't be too unfamiliar to you.

So maybe I'm interested in creating a search folder for emails that have Excel in the subject field. And I could go through and set lots of additional options. So if I wanted to see all of the emails that have Excel in the subject field and come from a specific person I could add that into here too. So you can really build up your criteria and essentially create a custom search folder. Now in this example I'm just going to add that in and click on OK. I'm going to say OK and OK again and you can see its automatically run that search. It's pulled back two results and if I look in my search folders I now have a Deb's Custom search folder.

So that's pretty much it on creating search folders. Hopefully you can see how useful they can be and you can create as many as you like to your heart's content.

One other thing we're going to start to do here before we move on is I'm just going to show you how to add folders into your Favorites and I'm going to show you this now because we are actually on the ribbon that we need to be on.

So if you cast your eyes up to the Folder ribbon and right in the center we have this little Add to Favorites button. And what this will do is that it will move whichever folder I have selected to this little Favorites area which appears just at the top of your folder list. And again the idea is it just makes it quick to access your most frequently used folders.

Now I'm going to move my Large Mail search folder up to this Favorites area. So I'm going to select it and I'm going to click Add to Favorites. And you can now see it's moved to the top of my folder list. So all that means is that if I have my search folders closed it's nice and quick for me to be able to run that particular search.

Now we are going to add more folders to Favorites as we go through but I just wanted to drop that in before we move on to the next module.

That's it for now. I will see you in the next module.

Video: Practice Exercise 03

Deb: Hello again and welcome back to our course on Outlook 2019. We're now down to Practice Exercise 03 where we're going to practice everything we've learnt in relation to searching in this section.

So the first thing I'd like you to do is to search your email for all mails received in the last week. Now again this criteria isn't set in stone. It really does depend on what you have in your email inbox. So if you don't have any emails received in the last week then please feel free to use a different search criteria.

I'd then like you to search in your email for all mails with attachments. And again if this doesn't apply to your email inbox then please choose a different search criteria.

Once you've practiced searching a couple of times I'd like you to clear the search results. I'd then like you to create a new search folder that finds all unread email. If you don't have nay unread email then please create a new search folder that searches for all large mail. I'd then like you to move that search folder to your Favorites area so it's easily accessible.

Now that should be more than enough for you to be getting on with. Good luck and I will see you in the next section.

Section 5 – Organizing and Managing Mail

Video: Ignoring Conversations

Deb: Hello everyone and welcome back to this course on Outlook 2019. We're all the way down into section five where we're going to start talking about how you can organize and manage your emails. And the first topic we're going to cover in this module is ignoring conversations.

Now we've spoken before about conversations and just to make this a little bit easier to understand I've actually gone in and I've turned on my Show as Conversations option so you can see that this top email here has gone back and forth between me and the recipient. So this essentially, all of these emails grouped together, is one conversation.

Now it might be when you're in the process of having this back and forth conversation, maybe you're just CC'd on this email chain, that you decide it's no longer relevant to you. So I'm sure we've all been in the situation where maybe we've had an email that's been sent out to five, six, seven people. It's going back and forth, people are replying and maybe as the conversation goes through it starts to become less and less relevant to us, or maybe it wasn't really relevant to us at all but we were CC'd for some informational purposes. Regardless maybe we want to take ourselves out of this conversation. Now in the past I know that I have received emails from people saying "Please can you remove me from the CC line" just so that they no longer receive these emails, but now you can essentially do it yourself by utilizing the Ignore feature. And what it will do is when you ignore a conversation it will remove all messages related to that conversation that you've got selected. And it will also move any future messages that come in related to that specific conversation to your deleted items folder.

So let me take this one as an example as we do have a bit of a conversation going on here. I'm going to select it, I'm going to jump up to the Home ribbon and in the Delete group you'll see that I have an option to Ignore and the keyboard shortcut there is Control plus Delete. And the screen tip tells us Move current and future messages in the select conversation to the deleted items folder. So if I click on Ignore it says This action will apply to all items in the selected conversation. I'm happy with that so I click on OK. Now it's telling me that this conversation and all future messages related to this conversation will be moved to the deleted items folder. And again I'm happy with that so I'm going to say Ignore Conversation. And they are instantly removed from my inbox.

Now if I jump across to Deleted Items I can see that there are those messages in there that I've just ignored. So what that means is that when someone else replies to this conversation they're going to go directly to my Deleted Items. They're not going to come into my Inbox. So again this is a great feature to use if you've been CC'd on something which isn't particularly relevant to you or you want to remove yourself from further replies.

Now say in that if you have ignored a conversation and you want to stop ignoring it you can essentially do the reverse. So let's jump into deleted items and what I'm going to do is because I don't have these grouped by conversation I'm going to go up to View and I'm going to say Show as Conversations in this folder and there I can see my conversation at the top. So I'm going to select it, I'm going to go to Home and you can see that the Ignore button is highlighted in gray. So that really tells me that this conversation is currently being ignored. So all I need to do to stop ignoring is click that button again. I'm going to say OK. And now my option is to stop ignoring the conversation. So I'm going to say stop ignoring and then when I go back to my Inbox that conversation is back in my Inbox.

So another really great little feature to help you declutter the emails that you're receiving.

That's it for this module. I will see you in the next one.

Video: Deleting, Archiving and Restoring Mail

Deb: Hello again. This is Deb and welcome back to our course on Outlook 2019. We're down in section five where we're exploring the options that we have for organizing and managing our email and what I want to explore in this module is the process of deleting and archiving in order to assist you with mail management.

Now when it comes to keeping your inbox streamlined and keeping your inbox size low you're probably going to want to start either deleting or archiving your emails. Now I like to do this on a weekly basis. So on a Friday afternoon I set aside an hour or so for housekeeping on my mailbox. And during that period of time what I'll do is I'll go through all of my emails, I'll move the ones that I want to keep to maybe a subfolder from within my inbox and delete the ones I don't need and anything I want to keep but I don't necessarily need to have access to immediately I will archive. So what I want to do here is show you those different processes.

So currently I'm clicked on my inbox and I'm clicked on my Other folder. And in here I have some nonurgent email. So what I might do on a Friday is take a look at this email and I may decide that some of these messages from the Office 365 message center I don't need anymore. So what I would probably do with this type of message, if I don't want to keep it I'm just going to delete it.

Now there's a couple of different ways that you can delete messages. You can either highlight the mail as I have done here and press the Delete key on your keyboard. Alternatively you can jump up to the Home ribbon where you have a Delete command in here. And you can also see from the screen tip that Control-D is the shortcut key. So when I click that Delete that mail is deleted from my Other folder. And what actually happens to deleted mails is that they move across to your Deleted Items folders. So essentially when you're deleting something you're not deleting it permanently. So if you do it by mistake you can jump into your Deleted Items folder, find the message and you can restore that if you want to. And if I wanted to pull this one back through all I would need to do would be to click and drag it back to my inbox.

Now one thing that's worth noting here is that if you do have a lot of email and you're trying to reduce the size of your mailbox and as a side note if you're interested in finding out how full your mailbox is, if you jump up to File you'll see just here the size of your current mailbox. So mine's pretty empty as this is just a training account. And you can see that I only have a very small amount in my mailbox. But if yours is pretty full you would probably need to think about going through your emails and either deleting or archiving.

Now when I say deleting, as we just saw here, it moves your email into your Deleted Items folder. So it doesn't technically reduce the size of your mailbox because essentially your mail is still within your mailbox. It's just in the Deleted Items folder. If you want to really make a dent in how much space you're using you would then need to go into Deleted Items and delete it

permanently from there. So for example I could select these top three emails by holding down my Shift key and if I click on Delete I get a message saying these will be permanently deleted. I say Yes and those are permanently gone. So that will have an impact on the overall size of my mailbox.

So the point I'm really trying to hammer home here is simply deleting mails from your Inbox doesn't necessarily reduce the size of your mailbox. You must delete them from your deleted items to have any impact on that whatsoever.

Now an alternative option is to archive your emails and there's a few different ways that you can do this.

Now one thing you need to understand about archiving is that your mailbox is essentially a PST file. So all of your mails are essentially stored into what we call a .pst file. And it's this that grows in size the more emails that you have. When you archive emails they go into a different PST file. So essentially by archiving it does help reduce the size of your mailbox because you're moving them to a different PST file. And the good thing about archiving is that you can still access your emails but they're not taking up space in your email account. So a lot of the time I will archive emails that I don't necessarily need right away but maybe I will want to refer to at a later time.

Now I'm going to show you a few different ways that you can archive. So again I'm just going to jump into Other and I'm just going to use one of these messages as an example. So let me take this My Analytics message. If I want to archive this particular message there are a couple of different ways that I could do it. So I could right click and in my right click menu right at the bottom I have an option to archive. Alternatively if I jump up to my Home ribbon next to the Delete button I have an Archive button. And as I hover over it says Move this item to your archive folder with a shortcut key there of Backspace. So I'm going to click on Archive and that message has now been moved out of my mailbox, out of this PST file, and into my Archive PST file. And you'll see on the left hand side that you actually have an Archive folder. So if I click on this you'll see that email now sitting there.

Now some other options that you have when it comes to archiving you'll find in the Backstage area. So if we jump up to File and in this Info section if we down to Tools you'll see you have a number of different options to help you manage your mailbox. So one in there is Empty Deleted Items folder. So if you just want to do a blanket delete of everything in your Deleted Items you can do that from here.

You can also choose to clean up old items. And this will allow you to archive whole folders and subfolders. So I could then go through, I could choose a folder or a subfolder that I want to archive and if I just want to make sure that I am archiving older items I can set a date in here. So I could say Archive items in the folders I've got selected that are older than a specific date. So I might want to say archive everything in my inbox that's older than the 17th of January 2020 and

what you'll see is that it's archived those emails and on the left hand side I now have an Archives folder and if I expand and click on the Inbox I'll find all of my archived emails. So I still have access to them but they've essentially been moved out of my PST file, out of my mailbox into my Archives PST file. So doing this method does have an impact on how much space you're using in your mail account. So that is a nice way of archiving very quickly all old items in a specific folder or subfolder.

Now another thing I could do here to help me with this is I could set up Auto Archiving. Now again some people don't necessarily like this. They prefer to archive mails manually themselves or select those specific date options. But if you want Outlook to auto archive all old emails or archive by criteria that you set on a regular basis you can set up auto archiving.

So again if we jump up to File and this time go down to Options and we want to click on the Advanced tab just here. And you'll see right in the middle we have an Auto Archive option and it says Reduce mailbox size by deleting or moving old items to an archive data file. So if I click Auto Archive Settings I can then specify how often I want Outlook to run an auto archive. So I could set that to a week, to two weeks, to every month. And then I have various other different options that I can customize, such as where those items are being moved, so on and so forth. So this might be something that you want to set up to automate the management of your mailbox size. So definitely worth exploring some of those options and setting up to best suit how you like to work.

Now again if you have archived an item and if I just click on the Archive inbox and you want to move those back to your mailbox, again you can select them and just drag and drop back to your inbox. And all of those emails are back again. So a really nice simple way of managing your inbox size by deleting and also archiving.

That's it for this module. I will see you in the next one.

Video: Cleaning Up Conversations

Deb: Hello again and welcome back to our course on Outlook 2019. We're still down in section five talking about organizing and managing your email. And in the previous module we took a look at how to keep your mailbox size under control by deleting and archiving your emails. In this module I want to highlight to you another little feature that's available within Outlook 2019 called Clean Up Conversations. And you'll find this option on the Home ribbon in the Delete group and it's just here. And you can see it has a little dropdown arrow because we have a few different options underneath Clean Up.

Now if you've never used this before let me just briefly explain to you how this can be helpful to you.

Now the idea of the Clean Up command is really to remove redundant emails conversations from your inbox. Now what do we mean by redundant email conversations? Well if you can imagine you've sent an email to Alex and Claire and both of them have responded to you and they've also included your message. So you receive an email that has your original message, Alex's response and Claire's response. You may reply and include the entire message string in your conversation. So now Alex and Claire can see the original message, their responses, and then your new reply. And it goes back and forth like this, leading to a very, very long email string. So what Clean Up does is it analyzes the conversation or the folder of conversations and will remove any redundant conversations. So essentially if when Outlook analyzes this conversation between the three of you and it sees that Alex has included the original and all of the replies in his reply it will clean out the rest of those message as they're deemed redundant as all of the information is in the one message that Alex has sent you. So instead of having a conversation which repeats the same thing over and over again through the replies it will just leave you with one message that has the entire conversation in it. And that's what the Clean Up command can help you with.

Now as we just saw we have a few different options and it really depends what you want to apply this to. So I'm clicked on this top message just here where there's been a few different replies and I could choose to just clean up the conversation.

Alternatively if I want to apply this setting to the entire inbox folder I can say Clean Up Folder and it's going to remove redundant messages from every conversation in the selected folder. So in this case that would be my inbox. And I could also say Clean Up Folder and Subfolders. So that's going to remove redundant messages from every conversation in the selected folder, so in my case Inbox, and any subfolders that I have off of my Inbox. Now I don't have any as yet but if I did I could apply this setting to all of the subfolders as well. So it really depends what you want to do.

So I'm going to say Clean Up on this top conversation. It says This action will apply to all items in the selected conversation. I'm going to say OK. And you can see now that little expand arrow has disappeared because everything is now just contained in this one email. So essentially instead of having four different emails sitting in my inbox repeating the same information it's deleted those redundant conversations and just left me with one email that contains the entire string. So this is another utility for really keeping the size of your email inbox down.

Now it's worth noting there are some settings with regards to clean up that you can explore and modify. And you'll find those underneath File, and if we jump down to Options and go to Mail, you'll see as we scroll down there is a whole section here on conversation clean up. So you can specify a folder for cleaned up items to go into and then you have some other settings that you can turn off or turn on, depending on how you'd like to have your inbox set up. So definitely have a read through those if you feel this is an option you might like to utilize.

That's it for this module. In the next module we're going to explore the wonderful world of Categorizing and Flags, so I'll see you then.

Video: Using Follow Up Flags and Categories

Deb: Hello again and welcome back to our course on Outlook 2019. This is still Deb and we are still working in section five where I'm showing you some utilities, tools and commands for managing and organizing your email a little bit more efficiently. Now in this module I'm going to introduce you to the Categorize and the Follow Up features, and these are two really useful commands to really help you manage your emails and also organize and group together your emails.

Now before we jump into these features I'm going to add another field to my email. So you can see already on the end here I've got the Categories column, which is absolutely fine. We're going to utilize that in a moment. But I'm also going to add the Follow Up column as well. Now a quick way that I can modify these columns without going in and changing my view as we saw before is if I hover my mouse over one of the column headings and right click you can see I have a Field Chooser option. So I'm going to click that and it pulls up this little field Chooser pane. Now I'm currently clicked on Frequently Used fields which in this case is absolutely fine and what I can do is go through and find the field or the column that I want to add to my email view. So I want to add this one, the Follow Up Flag. So all I need to do is click on it and then drag it up to my columns and I want it go on the end just here. I just make that a little bit bigger and there we go. We have our Follow Up Flag column.

And what I also might want to do is this CC column. I don't really need this. It's getting in the way. I can remove this column as well. And the quickest and easiest way of removing a column is just to click on it and drag it off until you get that cross, let go and it deletes it. So very quickly I've been able to reorganize the columns that I'm seeing.

Now I will say that if you wanted this set up to apply to all of your folders and subfolders it probably would be a good idea to save this as a new view and then apply that view to your other folders and subfolders. Otherwise you're going to have to go into each one and do exactly what I did there, which isn't the most efficient way of doing things.

So now we have that organized so that we can see our categories and our follow up flags. Let's take a look at how we can utilize them to help us manage our mail. And we're going to start with Categories.

Now you'll find the Categories option on your Home ribbon in this Tags group and it's this big colorful button just here. And as I hover over you get a screen tip and it says Categorize this item Categories applied to a conversation will be applied to all current and future items in the conversation. Now what Categories essentially allows you to do is group together conversations of the same type. And you can go in and then you can do things like search on all categories, things like that.

Now when we click the dropdown you'll see that our categories kind of have a generic name at the moment. We just have blue, green, purple, orange, red, and yellow. Now these aren't particularly meaningful. So for example if I wanted to group together emails that were related to the sales budget I might want a category that says Sales Budget instead. So what I can do is I can in to All Categories, I can select one of these generic names, so blue category in this case, and I can say Rename. I'm going to call this Sales Budget. I could if I wanted to go in and change the color of this. Now I'm fairly happy with it being blue at this moment in time. And I could also assign a shortcut key to this particular category. So I'm going to say Control-F2 and I'm going to click on OK. Then what I can do is I can go through my list of emails and any that are related to the sales budget, so I'm going to say this one and also this one. So I'm going to hold down my Control key, I can then go in and assign this category to those emails and you'll see that that will appear in the Categories column. So essentially I've grouped them together and I have a visual cue to show me that. I can then do the same, so I can go back into Categories, go to All Categories and I might want to change the green category to emails that are related to Project Alpha. I might want to change orange to emails that are related to Project Beta, and maybe purple if for emails related to Marketing, maybe red is going to be things related to meetings, so on and so forth. And you can go through and add new categories if you wish as well. So I'm going to do one here called Personal and I'm going to give it a dark color and I'm going to say OK and that will add that one in as well, and click on OK. So now I can go through and I can apply some of these categories. So I'm going to say these two are going to be related to meetings and you can see there it's applying it to all conversations that I've had within that email. I'm going to say this one and this one are related to Project Alpha. This one is Project Beta. This one is going be related to Marketing. So for this one I'm actually going to create a new category. So again I'm going to go into All Categories, I'm going to select yellow, and I'm going to rename it and this one is going to be related to Training. I'm going to tick it and I'm going to say OK to apply that category. So essentially what I'm doing there is I'm grouping together and categorizing emails of the same type.

Now another option I have in here, if I select this email up here which doesn't currently have a category, is I could set a Quick Click Category. Now what this would be is if there is one category that you use way more than any other you might want that to be the default so that you can just click and it will apply that category. So I'm going to say that the majority of my emails at the moment are related to Project Alpha. So I'm going to click on OK and then if I select this top email, if I go over to my Categories column and click it automatically applies that Project Alpha category. So again that just makes me much more efficient when I'm applying my categories.

Now aside from the visual representation and the grouping together you can also use categories very effectively when searching for a specific email. So you can search by category. So if I click in my Search box you can see in my Search Tools ribbon I can refine my search results by category. So I might want to see all of the emails I have tagged as Project Alpha and it's going to

go away and it's going to filter by just Project Alpha Category. So a really nice way there of grouping together your emails and being able to search for them easily. And this is one of the options that usually I will add to my Quick Access Toolbar and you can see that I have it over here. We added it at the beginning of the course and it just makes it super quick and easy for me to be able to add particular categories to my emails.

Now the second option I want to talk about in here are Follow Up Flags. And again you'll find these next to your Categorize option in this Tags group. And if we click the dropdown underneath Follow Up you can see we have some options, Today, Tomorrow, This Week, so on and so forth.

So if I take this email just here from Marcus with the subject Doc for Review maybe I have to review that doc by tomorrow. So in order to remind myself of that I might want to set a follow up flag. So I can go up to Follow Up and I can say Tomorrow. And you can now see in that column it says Follow Up. I could also add a reminder on that. So I might want to say Remind me tomorrow, which is March the 17th at 9 a.m. that I need to follow this up. So what I'll now get is a little popup reminder which will serve as a reminder to myself that I need to follow up this message. And what you'll see again if you look at this email is that now in the Reminders column we have that little bell icon, so I know that I've set a reminder on that.

So you have all different kinds of follow up flag that you can add, depending on when you need to follow up this email by. And aside from Today, Tomorrow, This Week, so on and so forth you do have a custom reminder as well. So you can define all of the dates and times yourself.

Now if you've marked items for follow up and you followed up and you want to remove this follow up flag or essentially tell Outlook that this has been completed if you jump up to Follow Up again you can see that you have a Mark Complete option. Now I can see here that the Reminder notification has disappeared from this email but it still says Follow Up in here. But if I hover my mouse over you can see there's a green tick next to it. Now I could go back up to Follow Up and say Clear Flag which will get rid of it, however, if I turn this back on. So let's say Tomorrow again, what I could do is if I wanted to see the exact status of this flag I could add another column and this time I'm going to choose Flag Completed Date and I'm going to drag that up here and currently they all say None but if I was to complete this follow up flag, so let's go up to Follow Up again and say Mark Complete. It's essentially going to, I make this a little bit bigger for the moment, give me the date and time that this task was completed on, like so.

Now one other thing that I want to just touch on here because we are going to explore this a little bit later on is if I mark this email with a follow up flag, so I'm going to say Next Week, and then jump across to my tasks and to switch to Tasks if you just go to your Folder pane it's one of these icons at the bottom. If I click on my tasks you can see that that email has now been added into Next Week. So it's showing as something I need to action next week. Now we're going to

cover this more when we get to the Task section but I just wanted to briefly show you that it does pull into there as well.

Similarly if you are viewing your Outlook using the To Do bar and you're showing Tasks you'll be able to see it in there as well. So it's a really nice way of keeping track of the things you need to follow up on, any action you need take in the future. And again when it comes to searching you can of course search by any items that you have flagged. And there we go. It's pulling back that one that's active for next week.

So that's a very brief run through of how you can utilize categories to group your emails together and flags to flag actions and tasks you need to complete. In the next module we're going to talk about organizing your emails using folders and subfolders, so please join me for that.

Video: Organizing Mail with Folders and Subfolders

Deb: Hello again and welcome back to our course on Outlook 2019. This is Deb and we're still down in section five taking a look at how we can organize and manage our mail effectively. And in the last module we saw how to group together emails of similar type using categories and also how to flag items in your mailbox for follow up. Now in this module we're going to do something fairly basic. We're going to take a look at organizing and managing your emails using folders and subfolders.

Now this is something which is very common for people to do and that is the process of creating subfolders in order to store your mail in. So for example, I'm currently clicked on my Inbox and all of these folders underneath are ones that were automatically created by Outlook. So what I might want to do is create my own folders and move mail into those folders in order to organize it and keep mail of a similar type all together. So what I'm going to do is I'm going to create a couple of subfolders underneath my Inbox.

Now there's a couple of ways that you can do this. You can either utilize the ribbon. So if you jump up to the Folder ribbon you'll see that the first option you have there is New Folder with the shortcut key of Control-Shift-E. so I could say New Folder and straightaway it asks me for the name of my folder. So I'm going to say Project Alpha. I want it underneath my Inbox so I'm going to say OK and now you'll see that slightly indented to show that it's a subfolder I have Project Alpha. Another way that I could do this would be to click on Inbox again, right click my mouse and the second option I have is New Folder and this time it opens up a little textbox where I can type in Project Beta and hit Enter. The third way I could do this would be using the keyboard shortcut. So Control-Shift-E, pops up that Create New Folder box again, and I might want to say Meetings and click on OK.

Now it's worth noting that you can also have subfolders of subfolders. So for example, if I've got Project Alpha here and I want to create a subfolder I go through exactly the same process. So I could do Control-Shift-E again, I can say I want a folder specific to Project Alpha Sales, I want it positioned underneath Project Alpha, click OK, and now I get my little Sales subfolder of Project Alpha and this becomes a collapsible and expandable folder. So very, very simple to create your folders and subfolders.

Now it's worth noting that on this Folder ribbon you can also do things like rename your folder, copy the folder, move it, delete it, all of those admin star tasks. And you'll find all of those available in that right click menu as well.

Now one other thing that you have both in this menu and also on your Folder ribbon is the Add to Favorites option. So again if I'm working fairly heavily on Project Beta at the moment and I'm utilizing this folder all the time this might be one that I want to add to my favorites. And if you remember in previous modules we added our large mail search folder to our favorites as

well. So I'm going to select Project Beta and I'm going to click on Add to Favorites and that will move it up to the top here. Now currently Project Beta doesn't have any emails any in it. So that moves me on fairly nicely to how to move mails into your different folders. And again this process is extremely simple.

Now this is where things like categories come in really useful. If I want to bulk move everything related to Project Beta into the Project Beta subfolder, as long as I've assigned categories as I've been going through I can use my Search box, I can go to Categorize and say Search for all items related to Project Beta. I can see I have one there, I can then click and drag it to the Project Beta folder. And now when I click on Project Beta I can see that that mail is there.

Now remember we don't have our categories listed in this particular view. So as I said before, if you want to be able to see these columns you're going to need to save this as a new view. So let's jump up to View, let's go to Change View, Save Current View as a New View and I'm going to call this Flag View, I'm going to click on OK, and then I'm going to say Apply Current View to Other Mail Folders. And I'm going to apply this basically to everything in my mailbox and also to subfolders. So now when I click on Project Beta I can see those categories, follow up flags, and flag completed date. So just remember that as well.

So a couple of the other options that you have on this Folder ribbon, you have the option to copy a folder. So if you have a subfolder selected like Meetings and you wanted to copy this to a different location you could say Copy Folder and then select where you want to copy it to. You can also utilize the Clean Up Folder utility. So we discussed cleaning up conversations previously. So you can run this on a particular folder in itself. And you can also delete everything within a specific folder as well.

So my advice to you is that at the end of every week you go through all of your emails, you apply relevant categories, you use those categories to search for those emails and then you bulk move them into a folder you have created. It keeps all of the emails of the same type together and it just makes your life so much easier when you're searching and looking for specific emails.

So that's it on organizing your mails into folders and subfolders. In the next module we're going to look at how you can use Quick Steps to process your email, so please join me for that.

Video: Using Quick Steps to Process Mail

Deb: Hello everyone and welcome back to our course on Outlook 2019. We're down in section five looking at organizing and managing our email. And in the previous module I showed you how you can create folders and subfolders in order to help you organize your mail a little bit more efficiently. Now in this module we're going to discuss something called Quick Steps. And what Quick Steps are are a way of automatically processing your emails. So what exactly do I mean by that? Well let's take a look at some of the Quick Steps that we have on offer to use.

Now jumping back up to our Home ribbon, in the middle here you'll see this group that says Quick Steps. And you can see as I hover over it says Quick Steps gives you the ability to take multiple actions in one click. So essentially it improves your efficiency when you're managing your email.

Now what we have in the top half of this Quick Steps box are some built in ways to process your email. So for example, let's take a look at this one here that says To Manager. Now if I hover over it says Forwards the selected email to your manager. So I have an email selected in my inbox currently and if I click on To Manager I can customize this Quick Step. And because this is the first time I'm utilizing this it's given me this first time setup box.

So what I could do here is I could leave it as To Manager as the name or I could say something like Marcus. And then the action I want this Quick Step to take is that I want it to forward any mail that I have selected to Marcus. So again I'm going to click on To, I'm going to go to my contacts, I'm going to select Marcus, and click on OK. And I'm going to save that Quick Step.

So now what you'll see is that if we look at the Quick Step it's been renamed to Marcus and it just means that in one click any email or emails I have selected will automatically be forwarded to Marcus. So I'm going to choose from the Other folder and I'm just going to say this email here, the Weekly Digest, I want to forward this to Marcus so he can see the Office 365 changes. All I need to do is go up to my Quick Step, click, and it basically creates a new email for me as a forward and it addresses it to Marcus. So all I need to do is click on Send in order to send that email. So it makes the whole process of forwarding slightly quicker.

Again I could do something similar, like if I am working in a close knit team and maybe I'm always emailing the same team members instead of creating a new email and typing in their addresses each time I could create a Quick Step for a new email to my team. So if I click on Team Email I'm going to actually keep this as Team Email and then I can just add the people that I want to send this email to. So again I'm going to go to my contacts and I'm going to say Marcus, Kirsty, Stacey, I'm going to add all of those people, click on OK, and click Save. So now when I want to send an email to those three people all I need to do is go up to Quick Steps, click on Team Email and it's going to create me a new email with all of those addresses

automatically added. So it helps you speed up the process of managing, processing, sending emails.

Now another thing you can do with Quick Steps is if we click the dropdown you can see aside from these inbuilt ones that we can customize ourselves we can create our own Quick Steps. So I'm just going to show you a couple of examples here. I'm going to start with this Flag and Move Quick Step.

Now again I'm going to keep this Quick Step with the name Flag and Move and then I can set the options that I want to apply. So what this is essentially going to do is it's going to flag an email and then it's going to move it to a folder that I specify. So I might want to flag the message for follow up tomorrow and then I want to move it to one of my other folders. So maybe I want to move it to Project Alpha as this email is already part of the category Project Alpha. And I'm also going to say Mark as Read and I'm going to click Finish. So now that I have this top one selected if I go up to Quick Steps and click Flag and Move you can see that it's disappeared from my Inbox, but if I jump across to Project Alpha you can see it's moved it there and it's also telling me that this one needs to be followed up. So again a quick way of processing emails.

Let's do another one. So this time I have this email selected from Vicky. It's the monthly report. I'm going to go up to my Quick Steps, I'm going to say New Quick Step, and I'm going to say Categorize and Move. Now again I'm going to keep this name as it is as it's fairly self-explanatory. I'm going to say move to the folder and this time I'm going to select Other Folder. I'm going to expand my mailbox, expand my Inbox, expand Project Alpha, and I want to select the Sales subfolder. Click on OK and then I'm going to choose a category that's going to apply to my message. So I'm going to click the dropdown and I'm going to say Sales Budget and I'm going to click on Finish. So now with this email from Vicky selected if I go up to my Quick Steps, I'm going to choose Categorize and Move, you can see that that email from Vicky has moved. And if I jump across to my Project Alpha Sales folder which is where I moved it to you can see that that category has also been applied.

So these Quick Steps really do help you to process emails a lot quicker and they really cut down the amount of clicks you're having to do to perform simple tasks. And I'm going to leave the rest of these for you to explore. You've seen how we can utilize a couple of them and they all work along the same lines. They're just performing different actions.

Now this Custom section at the bottom we're going to look at in the following module, so I'm going to leave that for now. But the final thing I want to show you before we move off of this topic is just this Manage Quick Steps option.

So if I click on that it's going to show you all of the Quick Steps that you have set up. And essentially you can go in here, you can delete them, you can edit them. So if I wanted to change, for example, the folder which I was moving these emails these into using this Quick Step I can customize that until my heart's content. I could also duplicate the Quick Step which will bring

across pretty much all of the actions required in that Quick Step and I can make some minor changes to them. And what I can also do in here is I can rearrange the order that the Quick Steps appear. So currently if you look on the ribbon you can see I have Categorize and Move, then Flag and Follow Up, Project Beta, so on and so forth. So I might want to move Team Email up that list so it appears at the top. I might also want to move Marcus to second in that because those are the two that I utilize most often and so I want them showing at the top of my Quick Steps list. So lots of different options for you to explore and play around with. And again if Quick Steps are something that you utilize fairly frequently you may want to right click and add the entire gallery to your Quick Access Toolbar. And you'll see here now I have that dropdown where I can easily access all of my Quick Steps no matter which ribbon I'm currently clicked on.

So that's it on Quick Steps. I will see you in the next module where we're going to talk about conditional formatting in your email, so please join me for that.

Video: Working with Conditional Formatting and Mail

Deb: Hello again everyone and welcome back to our course on Outlook 2019. We're still down in section five where we're talking through different ways to manage and organize your mail. And in this module I just want to show you how you can utilize conditional formatting within Outlook to make certain email messages really stand out from the rest.

So currently I'm looking at my Inbox and I've actually connected my personal account to my Outlook in order to demonstrate this to you.

Now what you can see is in my email list you'll notice that there is one email there which stands out more than the others and that is the email towards the bottom from a company called Flash Pack. And what you'll immediately notice is that we have a different font. We also have a different color font as well. So straightaway it immediately stands out to me. And this might be something that you want to do for maybe messages that are particularly important to you or maybe messages that come in from your manager or maybe messages that come in from specific team members. And conditional formatting is the way that you can do that. So I just want to briefly demonstrate how you can do that if you like that effect.

Now what I will say is that it's not particularly obvious when you look up at your ribbons. There isn't a button that we have specifically for conditional formatting, unlike say an application like Excel where it's right there smack-bang on the Home ribbon.

In order to apply conditional formatting you need to jump into the View ribbon. And you'll find it underneath this View Settings button.

Now we've been in here previously when we were looking at rearranging or reordering our columns. And one of the options that we didn't look at at that time and I said we would come back to it later is the Conditional Formatting option. And you can see it says User defined fonts on each message. So let's click on Conditional Formatting and you can see there it takes us into a little Conditional Formatting dialog box.

Now what I want to do is in this case I want to change the font and the font color for any emails that come in from News Training. So the first thing I'm going to do here is I'm going to click on the Add button and you can see it adds a little untitled option at the bottom and I'm going to rename that to News Training. I can then select the font that I want to use. So if I click on Font I can go in here and I can choose a different font, a different font style, and a different size. So let's go through and let's apply something that looks a little bit different. So let's go for this here. Bauhaus 93. Now this isn't necessarily one that I would use on my inbox because it can be a little bit hard to read but I just want to choose one that's very different so that it's obvious to you in this example.

I'm going to keep the font style on Regular and I'm also going to keep it on Normal. What I can then do is I can apply some additional formatting in the form of effects. So if I want to have a strikeout I can or an underline, I can have that too. But in this case I'm just going to change the color and I'm going to make it bright red and I'm going to click on OK. So I've now set the font and the font color. What I need to do now is tell Outlook what the condition is. So when do I want Outlook to apply this font and this font color?

Now there are various different things I can select in here. So I could if I wanted it to apply to emails that contain a certain word I could definitely do that. But in this case I want it to highlight when the email comes from News Training. So I'm going to say From and then I'm going to type in the email address for News Training. Now I could if I wanted to click on the From button and select from my contacts but in this case I don't actually have this one in my contacts so I'm just going to type it directly in. So there we go, infonewstraining@gmail.com. And I'm going to say OK, OK, and OK again. And there you go. You can now see that that email that I currently have in my Inbox from News Training has now got those conditional formatting settings applied.

And it also means that any further emails I receive from this email address will also be highlighted with the same font options.

Now you can set up as many of these as you like. You just keep going back into Conditional Formatting and adding new ones to really customize the way your emails look in your inbox.

So really it's just a nice way of making emails that are important to you stand out from the list.

That's it for this module. I will see you in the next one.

Video: Auto-Process Mail using Rules

Deb: Hello again and welcome back to our course on Outlook 2019. This is Deb and we are still down in section five where we're looking at utilities available within Outlook to manage and organize your email. And in this module we're really going to turn our focus towards something called Rules.

Now what Rules do is that when you set them up it allows you to process your emails automatically. And you have complete control over the conditions of those emails. So the best for me to explain this to you is really just to show you an example.

So currently in my Inbox I have this email here from More Yoga Studios highlighted and what I'm going to do is I'm going to create a rule. So I'm going to go up to my Home ribbon and in the Move group just over halfway across you have a Rules dropdown and I'm going to say I want to create a new rule.

Now because I have an email selected in my Inbox the rule will assume that this is the email and the email address that I want to deal with with this rule. Now that might not necessarily be the case but I'm going to show you how you can get around that in a moment. For the time being I'm going to create a rule for emails that come in from More Yoga Studios.

So you can see here at the top I get to set the conditions of this rule. So I'm going to say when I get an email from More Yoga Studios that's been sent to me and my email address, so if those two conditions are met I want it do the following. So I'm going to say I want Outlook to display in the new alert window. I'm not particularly bothered about hearing a sound but I want it to automatically move that item into a folder. And this is why these rules can be really useful for helping you manage your emails. So for example in this case I get a lot of emails from More Yoga Studios. They might be updating me on time table changes or letting me know about new classes that are available. They're not highly critical emails to me. I still want to read them but I don't necessarily need them in my inbox so I might have a special folder that I like to store them into. So essentially what I can do here is say with this rule that when I get an email from More Yoga sent directly to me I want it to move this item to a specific folder and I can then go through and choose the folder that I want to put it into. And I'm just going to say Kept Mails and click on OK.

Now what you also have in here when you create a rule is some advanced options and this really opens up a whole host of different things that you can do with your rule. So you can see here it's got at the top here Select Condition and it's already got the two conditions I've already selected, ticked, but I could go through and select more options. Now I'm actually going to go through and do more of these in a moment. For this one I'm just going to keep it with these two options set and you can see at the bottom it's just telling me exactly what that's going to do. So it says Apply this rule after the message arrives from More Yoga sent to me and it's going to display

More Yoga Studios in the new items alert window and move it to the Kept Mails folder. So that is essentially the rule that I have set up on these emails. So let's click on Next and again if I want to do something else with this mail aside from move it to a specified folder I have lots of other options I can choose in here. And again we're going to get into that in a moment. I'm just going to keep this rule as I have it. I'm going to click Next. I'm going to click Next again and I now get to specify a name for this rule. And to be honest I'm fairly happy with More Yoga Studios. I'm going to say run this rule now on messages already in my inbox and also turn on this rule for all future messages and I'm going to click Finish.

And there you go. What we now see is that all of those emails from More Yoga that I used to have in my mailbox have now had that rule applied to them. So what should happen is that I should be able to find them in the folder that I specified to move them to, which was the Kept Mails folder. And there we go. There are all of my email messages. So rules can be very helpful when it comes to automatically processing messages, saving you the hassle of doing it manually yourself.

Now if for some reason I wanted to edit that rule or make a change, maybe I wanted to move the mails into a different folder, what I can do is go up to Rules and I have a Manage Rules and Alerts option. And this shows me the rule that I have set up for More Yoga Studios and it shows me all of the options I selected for that particular rule. So if I wanted to edit this I would just make sure I select it, go up to Change Rule, and I can say Edit Rule Settings and that will take me back into the Rules Wizard. Now I'm not going to change anything with this one. I'm just going to Cancel out of that, but what I am going to do is I'm going to create a new rule directly from this window.

So this opens up the Rules Wizard again and what I get to select from this Rules Wizard is that I can select a template. So this one will move messages from a particular person to a folder, this one will move messages with specific words in the subject to a folder, so on and so forth. So I could choose one of these template rules or I can start from a blank rule, which is what I'm going to do here so you can see the whole process. Now the first thing I need to select is how I want to apply this rule. So I want to apply this rule on messages that I receive. I'm going to click Next and this is where I can go through and really set up what conditions I want it to check for. So I'm going to check the top one, From people or a public group. And you can see as I check it it adds it into this little section in step two at the bottom. And it says To edit the rule description click on the underlined value. So I can then click on people or public group and select who specifically this mail is coming from. Now again I'm just going to type this in to the From address at the bottom. So I'm going to say readytoescape@flashpack.com and click on OK. So currently the way this rule is set up is that when I receive an email from readytoescape@flashpack.com, I click Next and I can now define what I want to happen when I receive an email from that email address.

Now before we moved our emails from More Yoga to a specific folder. In this case I am going to say forward it to and you can see it adds that condition in step two at the bottom. I'm going to click on the link and I'm going to say forward it to my other email address. So I'm going to click on OK and you can see it's added that condition. And I'm also going to say I want you to flag the message as well. So now if I click on the underlined link I can select which follow up flag I want to apply. So when do I want to follow this up? So I'm just going to say Next Week and click on OK. Click on Next and this is where I can add in any exceptions to that rule.

So maybe I want to forward it and flag it except if the subject contains specific words or except if it's marked as high importance or except if it's sent to a certain person. So you have the option of providing exceptions to your rules as well.

Now in this case I don't want any exceptions. And this isn't mandatory. You don't have to add any. I'm just going to click on Next. I'm going to specify a name for this rule and I'm going to call it Travel. I'm going to say run this rule now on messages already in my inbox and turn this rule on in the future. And I'm going to say Finish. So if we now look at our email from Flash Pack I can see by the little icon to the left hand side that that message has been forwarded according to the settings in that rule. And if I look in the last column I can see that a follow up flag has also been applied. So I can see that that rule is doing exactly what I've asked it to do. And once if I go up to Rules and go into Manage Rules and Alerts you'll see that I now have both of these rules listed that I can go in and edit.

So you really carry on adding as many rules as you'd like to run on your inbox. And this is really good for managing specific types of emails. Again if there's like a newsletter that you get every week that you don't specifically need to read right away but you want to keep it it might be a good idea to have a rule set up that moves them into a specific newsletter folder which you can then check maybe every Friday, something along those lines. So it kind of just takes away the management side of emails for you by doing it automatically. So rules are definitely something to explore and definitely something to set up on your inbox if you think that's going to be useful to you.

And of course just one final note in this Rules and Alerts dialog box. If you want to delete any rules that you've applied you can select them and you have a Delete button up there and you can delete out that rule and it will no longer be applied to any future messages that come into your inbox.

So hopefully that demystifies the world of rules for you a little bit. That's the end of this module. I will see you in the next one.

Video: Managing Junk Mail

Deb: Hello everyone and welcome back to our course on Outlook 2019. We've made it all the way down to the last module of this section. So currently we're still in section five where we've been looking at different techniques for managing and organizing your email and I just want to end this section by just speaking to you a little bit about your junk email options.

Now junk email is essentially a folder and you can see that I've got my junk email folder highlighted just here and I have 396 items in my junk email folder. So junk email is the folder where Outlook sends mail that it believes to be spam. And you can customize Outlook's spam filter to essentially block or maybe whitelist senders or domains. Alternatively you can make changes to the automatic filtering options and delete spam automatically.

So currently what you can see here are all of the emails that Outlook has determined are spam for me. Now it might be that I want to go in and make some modifications to my junk mail options. And you'll find all of your options related to junk email on the Home ribbon in the Delete group.

So if we hover our mouse over where it says Junk and just take a look at the screen tip it says Mark the selected items as junk or prevent items sent by this sender, this sender's domain or this group or mailing list from being marked as junk. So essentially what you can do here is if I want in my inbox I could select an email like this second one down here and I could say I think that's junk and I can click on the Junk button and I could say Block Sender. And what that essentially does is it adds the sender of this email to my blocked senders list and then it moves the message to the junk folder. So I'm going to click on OK and that message has now been moved across to my junk email folder.

Now let's jump back up to that Junk email dropdown again. So you can see the Block Sender option there which you can apply as you like to your emails in your inbox. You can also add email addresses or domains to what we call a Whitelist. So never block this sender, never move this particular sender or domain to junk. And you have some other options for adding domains and email addresses to your whitelist as well.

You can also mark things as not junk. So if I was to come into my Junk folder and maybe I find an email that I actually do want to keep and is not junk I can select it, say Not Junk, and it will move it back to my inbox and any further emails I receive from that email address or domain will come into my inbox and they won't be marked as junk.

Now the thing I want to concentrate on here are the Junk email options because this is where you can really tailor and customize your junk email settings.

So what you'll find in here is that by default the junk email filter is set to No Automatic Filtering. So essentially only emails from senders you've deliberately added to your Block Senders list will end up in the Junk email folder. And you can see your Block Senders list by

clicking on the Block Senders tab. And you can see here all of the email addresses that I've added to my Block Senders list.

You can also switch this to Low to catch the more obvious junk email. And to be honest with you this setting should be high enough for most people, but if you do want Outlook to be a little more aggressive you can go for the High setting, but sometimes what you'll find here is that some regular mail may get caught up in that as well. So it means that you're really going to have to go in and check your junk email folder fairly frequently to make sure that it hasn't accidentally moved a legitimate email into your junk email folder. And remember if that does happen and you do find an email that you want to retrieve just make sure you highlight it, go up to Junk, and select the Not Junk option.

Now this option here, Safe Lists Only. So this will mark as junk any messages from a sender or domain that isn't in your Safe Senders List. And again we have a tab at the top here for Safe Senders. So if you find that emails from a particular person are always going into junk to ensure that you do actually receive those emails and that they don't go into the junk folder going forward you can add that email address or domain to your Safe Senders List and then their emails will never be treated as junk email.

And then this final option we have here, Permanently Delete Suspected Junk email instead of moving it into the Junk email folder. Now this setting is probably most useful if you've set your filtering to No Automatic Filtering. I wouldn't necessarily recommend this if you have your settings set to High because as I mentioned before with that High option set there is a higher probability that legitimate emails are going to be moved to your junk email folder. And if you also have this permanently delete option selected it means that you're going to lose those emails because instead of moving them to a junk email folder where you could easily retrieve them it's going to permanently delete those emails. So again use this option with caution. And the most sensible option to use this with would be the No Automatic Filtering option.

So those are your junk email options and they're definitely worth going in, taking a look at and definitely reviewing how your junk email is set up.

As I said, you do have these other tabs, your Safe Senders list, and if you want to add particular email addresses to your Safe Senders list you can add them directly from here by clicking on the Add button and typing in the email address. You can do the same with your Safe Recipients list. You can do exactly the same with Block Senders by utilizing that Add button as well.

And this International tab is really for emails which are coming in from international domains. So if you have emails coming in from other countries where the domain is different then you can go in and block top level domains list. So for example, if you're getting a lot of email coming in from a particular Russian domain you can block top level domains as well in this International tab.

Now when it comes to junk email again something I like to do on a weekly basis just to make sure that I'm keeping my email account under control and keeping that size down is I do like to just review what's in my junk email folder on a Friday afternoon. I go through and I check that everything in there is genuinely junk and then what I'll normally do is highlight all of the email, so Control-A, and then do a bulk delete of everything in my junk. Now that's not something that you have to do. It's just for me there's no real point in keeping lots and lots of email messages that are junk essentially, things I don't need to read, in my email account. They're just taking up space.

So again as part of good mail management and good practice I would definitely think about adding in some time again on a Friday or a day convenient to you going through and deleting out all of your junk email.

So that is it for this module and that is it for this section. In section six we're going to delve into creating and sending emails so please join me for that.

Video: Practice Exercise 04

Deb: Hello again and welcome back to our course on Outlook 2019. We're now down to Practice Exercise 04 where we're going to be practicing the skills that we've learnt in the Organizing and Managing Mail section.

So the first thing I'd like you to do is to create two new categories of your choice. So please feel free to name these categories whatever you'd like. I'd then like you to assign these categories to a selection of your emails.

I then want you to go to your Drafts folder and you should find in your Drafts folder the email that you addressed to yourself earlier. And I'd like you to send that email.

I'd then like you to create a new subfolder underneath Inbox and call it Training.

Now once you receive that email that you've sent to yourself I'd like you to move the email to that new training subfolder.

And that is it. So see how you get along with those tasks and I will see you over in the next section.

Section 6 – Creating and Sending Mail

Video: Creating a New Mail Message

Deb: Hello again and welcome back to our course on Outlook 2019. This is Deb and we've made it all the way down to section six and in this section we're going to be exploring some more options that you have for creating and sending email.

Now we have talked about this a bit so far in this course but there are some options that we haven't covered in detail and those are the options that I really want to get into in this particular section.

So the first thing we're going to do in this very first module is we're going to do something super basic and that is we're going to create a brand new email again and take a look at some additional we have with regards to the content of those emails.

So if you remember back to Create a New Email, very simple process. You can either click on the New Email button that you have on the Home ribbon. Alternatively you can utilize the keyboard shortcut of Control-N to create a brand new email.

Now let's start at the top here. We have a From field and it's saying which email address this is coming from. So that's my email address of the account that I'm currently clicked on. We then have a To field and a CC field. So one thing I want to highlight here is the fact that you can also add in a BCC field. So if you want to blind carbon copy anybody into this email if you jump up to the Options ribbon you have a BCC option. So if I click that it's going to give me that additional field. So just be aware that that is lurking underneath that Options tab.

I then need to go through and address my email. And again a very straightforward process. You can either directly type in the email address or addresses of the recipients. You can click on the To button which is going to take you across to your Address Book. And you'll see in this dropdown there are all different kinds of places where addresses are stored. So if you're looking for your contacts, ones that you've added into Outlook, and again that is something we're going to to cover in another section, if you jump to Contacts you will see all of your contacts listed there. And you can then go through and you can add various different people into the To field, like so.

Now I can see that those are valid email addresses because they've come up with an underline underneath them. If I'd accidentally typed in an email address which had a spelling error or wasn't a valid email address then that email address wouldn't be underlined, so I would know that I've done something wrong and I'd need to make a correction and check what that email address is.

If I also wanted to maybe manually add some email addresses into the To field which aren't contained in my address book all I need to do is do a semicolon, space, and I can then add in

another email address. Now you'll see once I finish typing that it hasn't underlined it. So a way that I can check to make sure that that is a valid email address is by clicking on the Check Names button on the Message ribbon. It goes away, it does a check, it finds that's valid, and then it underlines it for me.

So pretty straightforward to add in the email addresses that you want.

It's also worth noting when you click on To if you have a group of contacts set up in a Contact Group, so like this one here, I've got a Project Alpha contact group set up which contains a few different people. So I could right click and go to Properties and that's going to show me who is within that group. So I can see that Project Alpha contains Jasmine and Marcus. So if I was to use Project Alpha in my To line it's going to essentially send this email to the people contained within that group. And again I'm going to show you how to create contact groups when we get to that section of the course. But for now I'm fairly happy with just those three recipients.

Again I can add people to CC and BCC in exactly the same way. And then I need to add a subject, like so. Now you might think that adding a subject isn't particularly technical. You just type in what the email is about and yes that is true, but what I like to say t people when you're thinking about what subject to use is make it very clear, make it so that if anybody is searching for this email they have a good idea of keywords might possibly pull this email back. So for example, if this email is going to be about the new Outlook 2019 course and somebody is looking for that in their email they're probably going to want to type in a keyword such as Outlook Course, Outlook 2019, something along those lines. So make sure your subject is pretty self-explanatory.

What I'm then going to do is I'm just going to type my message. So this is a very basic unformatted message that I've got in here. And I might want to make various different formatting changes to it. And again I'm not going to linger too much on this because we did do this in a previous module, but I am going to make a couple of little changes here. So I'm going to double click to highlight the word New. I am going to jump up to my text formatting options and click this little arrow and I'm going to say I want this word in all caps and also in bold and click on OK. I am going to take this little list of items that I have here, I'm going to highlight them, I'm going to go up to my formatting again and I'm going to make those bullet points. I'm going to highlight all of the text in my email by using the keyboard shortcut Control-A to select all. And I'm going to make the font slightly bigger because to me at the moment it looks a little bit small. So let's make it 12 points.

And then at the bottom here I've got "For more details and pricing go to" and then I have a web address. So what I want to do is in this email I want to make this a link so that people can click on it and it's going to jump them to that website. So all I need to do is highlight the website address, go up to the Insert ribbon and you can see just here I have an option for hyperlinks, so I'm going to click on Link. Now because I've highlighted the text it's added that in. So it says

Text to Display. Now it might be that you want something a little bit neater than having the full web address listed, particularly if you have quite a long web address. I might just want the text to display to be SimonSezIT. And at the bottom it's saying okay this is the web address we're going to be using. And that's perfectly fine. When I click on OK you can see that changes and it's now got an underline. And if I hold down Control key I can click and it's going to jump me to that particular website. So pretty simple to add in links to external sites.

Now as go through this section I'm going to be showing you different elements that you can add into your emails, but I am going to show you a couple of them in this module. So again we're staying on the Insert ribbon and I just want to show you how Outlook these days kind of operates very much like a Word document. There are so many things you can insert into your email it almost feels like you're working in a Word document. For example, we're up on the Insert Ribbon. You can see that you have an option for inserting a table into your email. So it might be that I want to insert a table that has two columns and let's just say five rows. And I can then go through and just add my data into this table, like so.

Now one important point to mention is again much like Word or Excel contextual ribbons come into play when you're working within an email as well. So you see that because I've added a table and I'm clicked in my table if you cast your eyes up to the ribbons you'll now see that you have two additional ribbons underneath Table Tools. So that helps you control the design of your table, much like it would if you were working in a Word document. So again I could jump to the Layout tab and if I wanted to add another row I can do that. I can Insert Below to give myself another row. I can delete rows, I can split cells and split the table. And I can do all kinds of formatting or design options in here as well. So if I wanted to give my table a completely different look and feel I can go to Table Styles and I could maybe apply something a little bit nicer, like so. So again I have all of my table formatting options available to me within an email, which is a really nice little option. Again, back in the day with Outlook you had very few things that you could do. It definitely didn't work like a Word document. But as we get newer and newer versions more and more features come in to your Outlook emails. So just remember you can do things like insert tables and you will have access to those contextual ribbons.

Now the last thing I want to show you in here very quickly before we move on to the next module is Quick Parts. And again this might be something that you're used to using in Word but Quick Parts can really help you if you have reusable pieces of content. So maybe content that you put into emails all the time. Instead of typing it out each time you can save it as a Quick Part and then reuse it very quickly. So maybe this table is something that I put in a lot of emails and I don't want to have to go in and recreate this table from scratch every single time I create a new email. So what I could do is select the entire table by clicking on this crosshair in the corner, I could go up to Quick Parts and I could say Save Selection to Quick Part Gallery. I'm going to give this a meaningful name. So this is going to be Courses Table. I'm going to save it to the gallery Quick Parts and you can select different categories. So if you have a lot of Quick Parts

you can create your own categories. Now I'm happy with General at the moment and I'm just going to give it a quick description like so and I'm going to say OK.

So now what that means is if I just minimize this email for one second and create a new email, if I want to reuse that piece of content and put that table in all I need to do now is go up to Insert, go to Quick Parts and you cans see there my table is listed. So I just need to click it and it adds it in.

Now you can add anything as a Quick Part. It could be a table, it could be an image that you use frequently, maybe a logo, you can use paragraphs of text, anything like that can be saved as a Quick Part. It's reusable content and it really does help with efficiency and so you don't have to do the same thing over and over again. So I just wanted to show you that very, very briefly.

So that is it. That is the basics of creating an email. We're going to go into this a lot more. A lot of these options that we have on these ribbons we haven't explored yet and we're going to explore those over the next modules.

So all that remains to do is to send this email. So I'm going to go up and I'm going to click Send.

That's it for this module. I will see you in the next one.

Video: Attaching Files, Photos, Graphics and Other Items

Deb: Hi everyone and welcome back to our course on Outlook 2019. We're still down in section six and we've seen how you can create a new email and how you can format it and also add things into that email, such as links and Quick Parts. In this module I just want to show you some of the things that you can insert or attach to your emails.

Now I'm sure most of us have been working with email for a very long time and we're probably very used to attaching documents and sending them to other people. So that might be a Word document or an Excel spreadsheet or a PowerPoint document, something along those lines. And I will say actually attaching documents and sending them to recipients is kind of a little bit old school these days. A lot of people now are working in a Cloud environment and people are more likely in general to link to documents stored in the Cloud. However, there is sometimes still a necessity to be able to attach items or copies of items directly into your emails and that's what we're going to cover in this module. So I'm going to show you a few different items that you can attach and we're going to be utilizing two different ribbons in this module. We're going to be utilizing the Message ribbon that I'm currently clicked on and also the Insert ribbon up here. Now the first thing I'm going to show you is how to include a picture or a photo into your message.

Now I've already created a new message just here and I've put in the address and I've added the addresses for the recipients and I have a very brief message in here. I put, "Hi Guys, Firstly I don't want to make you jealous but I'm remote working from here today." And I want to add a photo into this message. So all I need to do is position my mouse where I want that image to be inserted, go up to my Insert ribbon and I have a few different options in here for inserting illustrations or graphics.

So I'm going to jump straight to Pictures. And what this will allow me to do is insert a picture that I have saved off locally. So you can see it's jumped me to my local drives and I'm going to insert a picture of Bali. And I'm going to say Insert and there we go. There is my picture of Bali. And again as we mentioned in the previous module when you do insert items into your emails you will receive those contextual ribbons. So you can see because I'm clicked on that picture if you cast your eyes up you see we now have a Picture Tools ribbon with formatting options. So I can then start to make changes to the picture that I've inserted. So it might be I want to modify the color of that picture, I might want to do some other kinds of correction, so make it sharper or softer. I can crop that picture if I need to. So again I could utilize my Crop utility. And I might want to drag that in very slightly. And the same on the other side. And then if I click Crop that's going to crop that picture in line in the email. I can also do things like use the handles around the outside to resize this picture or make it smaller. So lots of editing options when you insert a picture into an email.

Now another option I have here is if I go back to Insert I could insert a picture from online. So what this is going to do, it's going to open up the online picture gallery and this is powered by Bing. And I could do a search for the particular picture that I wanted. So again if I type in something like Bali and press Enter it's going to pull back all of the images of Bali. And it is worth noting here that we have Creative Commons only selected. And that's really important because again you need to be aware of copyright when it comes to utilizing pictures. You can't just jump onto Google, save up any photo, and use that either in an email or a PowerPoint presentation. You must make sure that it's available for use by anyone. And the good thing about this is that it filters by images that only have a creative commons license assigned to them, which means that you can use them. It's also worth noting here you have a filter. So if you're looking for a specific image, so maybe you're looking for a specific size or maybe you want to search solely by type, so maybe you're looking for clipart as opposed to photographs. And one that's quite useful is if you want to search for images that have a transparent background. You can filter for those types of images as well. So don't forget that you have that filter in there. So I could then just select one of these pictures, click on Insert and that's going to insert that in again.

Now with this particular image I have two contextual ribbons come up, Picture Tools and also Drawing Tools as well. And again I can go in and I can resize this image. I can make it larger, smaller. I could even give it a border if I wanted to. So you'll see if I select Black it now has a slight border. And I might want to also change the thickness of that border around that picture. So these are all standard utilities that you'll find in Word, but don't forget that you do have access to them in Outlook as well.

So that's pictures and online pictures. You can also insert shapes into your document. So again if I was to click on a shape I can definitely do that. I have icons. Now we've seen how to insert those icons in a previous module. So those are really nice. We have the ability to insert 3-D models. And again this is something that is fairly new to Microsoft. And these are pretty cool. So let me just do a quick example of, I'm going to type in Plane and hit Enter and it's going to pull back all of these 3-D models of a plane. It might have been better actually if I type in Airplane. There we go. And maybe I want to insert something like this. Now these 3-D models can sometimes take a few seconds to load because they are pretty intensive, but what you end up getting is a model and you can basically rotate it and see 360$^\text{o}$ views of this particular image. So sometimes those are really nice to illustrate a point or just make your email a little bit more fun.

And again because I have that selected you'll see that I now have a contextual ribbon for 3-D Model Tools and I have lots of different options for formatting that particular object. Now I don't want this in my email so I'm just going to press the Delete key to delete that out. So don't forget, 3-D models are available as well.

You then have a few different charting options. So you can insert something like SmartArt. So SmartArt is particularly good if you're doing something like a hierarchy diagram or trying to display like a process chart you can utilize SmartArt.

So again I'll just show you very briefly. I've clicked on Process and I'm going to select this one just here and that's going to put in something like this. So if I was trying to maybe explain the process for creating a new training course I might want to add in something like this. So I might say Research, Develop table of contents, Write scripts, so on and so forth. And of course I can add additional textboxes on to the end here. So you can see again we have our SmartArt Tools contextual ribbon where I can do things like additional boxes and also format everything that I have within here. So SmartArt is a nice way of being able to add Process Charts, Flow Charts, Hierarchal Diagrams into your emails.

We have the same thing here with Charts. So you can add a chart directly into your email as well. And again what this will do is it will insert the chart the that you choose and you then get this little Excel mini window popup which will allow you to basically edit this information to display the figures that you want to display in this particular chart. So maybe again this was related to course sales. I might want to change Category 1 to Outlook, Category 2 to Excel, Category 3 to Word, Category 4 to PowerPoint, and I could go on adding them in. And maybe I want to show sales for 2017, 2018, 2019. And I could then go in and I can add the correct figures. But what you'll see just with those brief changes that I've made is that the chart has updated. It's now showing Outlook, Excel, Word, PowerPoint. It's showing my years in the legend. And as I change these figures the charts going to update like so. So a really good way of being able to add a chart and edit it on the fly to display some information. So again don't forget that you have the option of inserting a chart as well.

Now the final one we have in this little group is Screenshot. And again this is a great way of being able to take a screenshot and directly add it into your email. Now make sure that your mouse is clicked where you want the screenshot to add. And in fact I'm going to go underneath this second point that I have. I'm going to say Screenshot. Now I could choose from the windows that I have open I could choose Screen Clipping and this is the one I'm going to select. Now with Screen Clipping, this is a really important thing to note, the item that you want to screen clip needs to be directly underneath your new message because let me show you why. If I click on Screen Clipping now you can see the screen kind of ghosts out, I get this crosshair, and the idea of this is that you can then drag it over certain parts of the screen and it's going to take a screenshot. So there I've just got a screenshot of my inbox basically, which isn't what I want. So what I actually want is I want to have a screen clipping of these three Excel courses from the SimonSezIT website. So I need to make sure I have that open. I then need to make sure that my email is on top of it. Then when I go to Screenshot and Screen Clipping it goes to the item that's underneath that mail message. So I can then drag this box around what I want to screen clip, let go and it adds it directly into my email. So a really important point there because I know a lot of people do get a bit confused by that. Have what you want to clip directly underneath your new mail message.

So that pretty much covers off that Illustrations group and inserting pictures, online pictures, shapes, icons, 3-D models, charts, and also screenshots.

Now by far the most common thing to insert into your emails is probably files. Now there are a couple of different places where you can go to do this. We could stay on the Insert ribbon and you'll see that the first item we have is Attach File. And what this will do is it will bring up the last files that I accessed under Recent Items. So it might be that I want to attach this Outlook 2019 course information document, which is an Excel spreadsheet that I have saved off into OneDrive. So I can very quickly select it. I can attach it as a link or attach it as a copy. Now the important distinction here is that if you send a link whoever opens that link if they start to work on the document it essentially updates on the server. If you attach a copy, if Marcus opens this and starts to work on it in order for me to see his changes he's going to need to reattach his copy and send it back to me. So in many cases if you want to see everybody's updates on the original copy you want to send a link. Okay? So super simple.

If we jump back into there again, if you don't happen to have the document listed in Recent you can of course browse your PC and pick up your document from your local drives or your attached Cloud storage.

Another thing that people sometimes like to attach is other Outlook items. So if you want to attach somebody else's email you can definitely do that by clicking the Outlook Item button. So what this will allow you to see is your emails in your inbox and then you can select one of those to attach. So it might be that I want to attach this email here from Marcus. I can select it, click on OK, and that email is essentially now attached to this email as well. And I can do the same for Calendar Items.

Now another thing I might want to attach on to the bottom of my email here might be my business card, which is going to contain all of my contact details. And again business cards are really just taken from your contacts in Outlook. So I'm going to jump to Other Business Cards. I'm going to make sure that I have the correct account selected and there it's going to show me my contacts and I can see that mine is there at the top. I can say OK and that's going to essentially attach a nice little graphical business card to the bottom of this email.

So those are the main items that you might want to attach your emails. There are some other things that we haven't covered such as email signatures and we're definitely going to cover those in the following modules, but for the time being we've covered quite a lot there, quite a lot to take in. I will let you digest that and I will see you in the next module.

Video: Directing Mail with @ mentions

Deb: Hello everyone and welcome back to our course on Outlook 2019. This is going to be a super quick module really just to explain to you @ mentions in emails. And again this is something which was introduced in some of the later version of Outlook and if you're used to using applications like Twitter or maybe Instagram or things like that you'll probably be reasonably familiar with using the @ symbol to get someone's attention. And you can do that in emails in Outlook now.

So let's create a new email. I'm going to say Control-N. Now it might be that this email that I'm going to type is going to quite a few people. And it might be that within the body of this email I have certain action points that I want different members of the team to action. And I really want those action points to stand out for the person that I've assigned them to. I'm sure many of us have been in the situation where we've received a really long email and we've kind of skim read it and we've missed something which we needed to maybe do, maybe a task that's been assigned to us. So in order to make this stand out a little bit more you could use @ mentions.

So I might want to type a message. "Hello." And I'm just going to say, "Please can you action the following". And I might want to direct this to Marcus. So what I can do is I can type the @ symbol and what it will do is it will look up all of my contacts that I have and pull up a list. And I can then go through and select the person I want to direct this particular action to. So I'm going to select Marcus and you'll see that as I do that it automatically puts the person that I've @ mentioned into the To field.

Now you could go a stage further. Even though this does highlight, so it does stand out to people, you could also if you wanted to make it really obvious you could highlight the @ mention and you could maybe change the color of the font to really make it stand out. So it's a great way of getting somebody's attention.

Now one thing that's worth noting here is that when you send this email if the recipient has a column in their Outlook for mentions they will see the little @ symbol next to the email when they receive it into their Inbox to show that they've been @ mentioned. So it's just another indicator to let them know that this email requires their attention.

Now if you don't have the mention column turned on in your Inbox, I'll very briefly show you how to do that. If you right click in your column heading area and go to Field Chooser, underneath All Mail fields if you scroll through you'll see that you have one here that says Mention. And you could if you wanted to drag and drop that and have a field. And you can see there immediately that one of these emails has a little @ symbol. So that means that I've been specifically mentioned in this email so I might want to make sure that I don't just skim read it and I pay attention to any action points assigned to me.

So that is it. A really simple way to get somebody's attention in an Outlook email. That's it for this module. I will see you in the next one.

Video: Recalling a Message

Deb: Hello everyone and welcome back to our course on Outlook 2019. This is Deb and in this module we're going to be talking about the very important option that you have in Outlook for recalling a message.

Now I'm sure that many of us have had the situation where we've sent an email message and then immediately regretted it. Maybe we've sent it to the wrong person or maybe we forgot to delete some text out of it that wasn't supposed to be there and it can send you into a little bit of a panic actually if you realize that you've sent the wrong email to somebody. Fortunately within Outlook there is a recall feature and that is what I want to show you in this particular module.

Now when it comes to recalling an email it isn't quite as straightforward as it might first seem. There are a few conditions that need to be met in order for you to be able to recall that message successfully. So the firs thing is that both you and your recipient must have an Exchange server email account and use Outlook as the email client. So if you're in an organization where everybody is using the software and attached to the same exchange server then this shouldn't be a problem.

And in order for the message to recall successfully the recipient's mailbox needs to be open when you attempt to recall the message. The original message must also be unread in the recipient's inbox. So if you've sent a message and whoever you've sent it to has opened it immediately then you're not going to be able to recall that message. You can only recall messages that haven't been opened yet.

And also another important point is that the message can only be recalled if it hasn't been touched by any kind of process, such a rule that's been applied or a spam filter, something on those lines.

Now a lot of the time you may not know this information so all you can really do is recall the message and hope for the best, but I am going to show you the process anyway.

So what you need to do is you need to jump down to your Sent Items and then open the email that you want to recall. Make sure that you're on the Message tab and in the Move group you'll see that you have an Actions dropdown. And an option that we have in there is Recall this Message. And if we just take a look at the screen tip it says Recall the message that you have sent. And then it says Message recall can delete or replace copies of this message in the recipient inboxes if the message has not been read. So again, really important point there. The message can't have been read.

So let's click Recall this Message and you then get two options. So you could choose to delete unread copies of this message or you could choose to delete unread copies and replace with a new message. So again which one you select really depends on what you want to do. If you just

want to do a blanket delete then the first option is the one that you would select. And in my case that's what I want to do.

I also want to make sure that I have this box ticked down here. So tell me if recall succeeds or fails for each recipient. So I'm going to know if my recall has been successful or not. So I'm going to click on OK and you see that I now get this little informational piece of text that says You tried to recall this message on Friday, March the 27th at 1:25 p.m. So again remember this really does depend on the settings of the recipient's email client and whether the original email has already been read and also several other factors. So the results of your attempt to recall a message can vary. So if the recipient has already read the message the recall will fail and both the original message that you sent and the new message if you replaced it with on, or the notification of your attempt to recall the original message are available to the recipient. Now if the recipient has not opened the original message and opens the recall message first the original message is deleted and Outlook informs the recipient that you deleted the message from their mailbox.

Now there are a couple of other options that you have with regards to delaying the delivery of emails to give yourself a little bit of extra thinking time. So I'm going to show you a couple of those as well in this module.

Now the first one is if I was to create a new email message what I could do is once I've completed my recipient's names, added a subject and a message I could jump up to the Options ribbon and you can see in More Options I have a Delay Delivery button. And you can see here at the bottom in the Delivery Options section it says Do not deliver before and then I can select a date and a time. So it means that this message is going to be held after I click on the Send button and it won't deliver it until the date and time that I've specified. So you could if you wanted to give yourself an hour in here in case you need to cancel that message. So that is an option, the Do not deliver before. And you can only apply this to the particular message you're working on at the time. It's not a blanket delay delivery on all messages that you send. But that is an option that you do have that I just wanted to highlight to you.

Another thing you might want to do is create a rule and give yourself some time after you click Send to be able to recall that message and this does apply to all emails that you create. So let me show you what you would need to do.

Let's jump up to File and go down to Manage Rules and Alerts. So what we're essentially going to do here is we're going to set up a delivery rule. So I'm going to click on New Rule and this time I want to start from a blank rule and I want to apply this rule on messages that I send. So I want the bottom option just here and click on Next. Now I want this rule to apply to all messages that I send so I'm not going to select any specific criteria in here. So I'm going to make sure that none of these boxes are ticked and I'm going to click on Next and it will tell me that this rule will be applied to every message you send. Is this correct? Yes. So now we need to tell the Rules

Wizard what we want to do with this message. And you'll see the option at the bottom here is Defer delivery by number of minutes. So when I tick that it adds it into the bottom pane. I can now click on the link and specify the number of minutes. So maybe I want to say when I click the Send button on a new email it's going to delay the delivery or defer the delivery by two minutes. So if 30 seconds after I send it I think to myself, "I really need to recall that message" I can because it isn't being delivered for two minutes. And you can set that to whatever you want it to be. I'm going to click on OK. Click on Next and I don't want to specify any other criteria so I can click on Finish. And it says This rule will only run when you check your email in Outlook. If Outlook isn't running this rule won't work for email you check online or from another device. And there we go. So I now have a two minute defer delivery rule applied to all the messages that I send.

So those are the options that you have for firstly recalling an email you've already sent and also delaying the delivery of emails to give yourself a little bit of thinking time.

That's it for this module. I will see you in the next one.

Video: Making Decisions with Voting Buttons

Deb: Hello everyone and welcome back to our course on Outlook 2019. In this module I'm going to talk to you about voting buttons. Now voting buttons are a great way of gauging the opinions of your team members, your colleagues, or a group of recipients. So essentially what a voting button allows you to do is compose a message that maybe contains some kind of question or poll and then you can add buttons to your email which essentially allow the recipients to vote on a particular option. So let me show you how they work.

I'm going to jump up here and I'm going to create a new email and the first thing I'm going to do is I'm going to address it to my team. So I'm going to select Jasmine, Kirsty and Marcus and I'm going to give this a subject of Team Activity Week, and I'm going to pose my question. So my question to my team is "Hello Everyone, Which is your preferred location for the team activity week?" And then I've put, "Please use the voting buttons." So now I need to add the voting buttons into my email.

Now you'll find your voting buttons up on the Options ribbon and in the Tracking group in the middle you'll see you have this option Use Voting Buttons. And the screen tip says Add Voting Buttons to this message. People reading this message can vote on any of the options you specify. And the votes get sent back to you as a special email message. So I'm going to click the dropdown and I have a few options in here.

So you can see I have Approve, Reject, Yes/No, and Yes/No/Maybe. So these three options above the line are kind of ones that have been suggested by Outlook. So in many cases it might be that these voting options are suitable to whatever question you've asked. Now in my case where I've asked "Which is your preferred location?" these don't make much sense. So I would have to go for the Custom Option and this takes me into Properties. And you'll see here the middle group is Voting and Tracking Options.

Now it's already ticked, Use Voting Buttons, and then it's got by default again Approve and Reject. And what I can do is I can go in and customize this and add the options I want to appear, making sure that there's a semicolon between each new option. So instead of having Approve I'm going to change that to England, I'm going to change Reject to Island, semicolon, Wales, semicolon, Scotland. So those are my voting options. And I'm going to say Close. And you can now see in my email message at the top I've got this little informational icon that says "You added voting buttons to this message." I'm now going to click on Send.

So to show you what that looks likes for the recipient I actually sent this email to myself as well. So I've opened it up here and this is what it looks like for anybody who receives an email where you've used voting buttons. So you can see at the top of the email it says Vote. By clicking Vote in the Respond group above. And just above here where in the Respond group I have a Vote dropdown and those are the options that I added into my voting buttons. So I'm going to click on

Scotland and I'm going to say Send the response now. It then tells me that I responded Scotland and then gives me my date and time. So that is now going to go back to the original sender of the message and they can see which option I've cast my vote for.

So now if I go back to my inbox you can see that I've got an email come in at the top there that says somebody voted for Scotland. So if I open this email you can see it says the sender responded to Scotland and if I click I get a chance to view all of the voting responses so far. So if I've sent this email out to a large group of people and they were all sending back their responses if I click View Voting Responses it's going to show me all of the people I sent it to and all of the responses that they've sent back. And at the top there I have a summary of the total. So only one person has responded so far and they voted for Scotland.

So it's a really nice way to gauge the opinion and get responses on various different options that you've set. So that is how you utilize voting buttons in Outlook.

That's it for this module. I will see you in the next one.

Video: Adding an Email Signature

Deb: Hello everyone and welcome back to our course on Outlook 2019. In this module we're going to discuss all things related to email signature.

Now I'm sure many of you know what an email signature is but in case you don't your email signature is basically that block that appears at the bottom of any email that you send that contains your contact details. So it might contain your name, your telephone number, your email address, maybe your company logo, and other information that might be important to your recipient. And you can set up your email signature so that every time you create a new email it appears automatically at the bottom and you can choose if you want that email signature to appear on replies and forwards as well. Again some people like to have it on everything, other people just like to have it when they create a new email and leave it off of replies and forwards. But that's entirely up to you and you can customize how you want your signature to be used. So let's take a look at how we can set up an email signature.

So the first thing you need to do is create a new email and you'll see on this Message ribbon in the Include group we have a dropdown for Signature. And I'm going to go straight down to the bottom one here, Signatures. So this opens up this Signatures and Stationary dialog box and I'm currently clicked on the Email Signature tab at the top. And you can see underneath where it says Select signature to edit I have two default options, Business and Personal. So what you can do essentially is set up two different email signatures.

So what you can do essentially is have a different email signature for business emails and a different one you use for personal. So you could set up two as the default here.

Now you'll notice underneath there is a New button. So if you want to add even more signatures you can. So maybe you want to have three or four different signatures that you use. You can definitely do that in here as well.

Now for the time being I'm going to stick to a business signature. And if I look over on the righthand side it says Choose default signature and then I get to select my email account. Now I have a couple of email accounts in here, one is business, one is personal. Now I'm doing my business signature so I'm going to leave it clicked on this email account. It then says New Messages and then Replies and Forwards. And this is what I was talking about before. You may just want to have your signature apply to new messages. So I do so I'm going to select Business. And if you want your signature to appear on replies on forwards as well you could go to the dropdown and select Business there as well. Now if you don't want it to appear on replies and forwards just make sure you leave that set to None.

So once I've set all of those settings I can then go to the Edit Signature window and start to essentially design my signature. So I'm going to have my name and you can really design this however you want. I'm going to have my job title. I'm going to have my company name, then

underneath I'm going to have my phone number. And it might be that I want to do some basic editing to this. So maybe I want to select all of the text and I'm going to change the color to a dark blue color and maybe I want my name and job title to stand out a little bit so I'm going to make that bold and maybe I want to change the font to something else so I'm going to say Arial.

Now other things you can do in here, obviously we have our alignment tools. You could import your details from your business card. So if you have yourself set up as an Outlook contact you could import your details from your business card. And you can also do things like add in pictures or add in links as well. So if you have a website, so let's just say something like that, I could make this a link. I'm happy for it to display the entire web address as the link so I'm just going click on OK and that gives me a link at the bottom. And I might want to go in and make that exactly the same color as my text, like so.

So you can really have a play around with this. This is just a very basic example. You can go as extravagant as you like. You can add your company logo, all of those kinds of things. Just make sure you have any pictures that you want to add saved off locally so that when you go to the Add Pictures button you can pick them up from your local drives.

Now once you're happy with your signature you can click on OK. And if I close down this new message and just create a new one you'll see that now it's automatically added that signature onto the bottom of my email.

So let's quickly jump back to our signatures. So again I could also create a personal signature as well. And I've already added one in there. For personal emails I just want to have Best Wishes and Deb on the bottom. And I might want to use that if I'm sending emails from my personal account. So I'm going to say when using my personal account I want my personal signature applied to all new messages but I'm not going to bother with replies and forwards. Click on OK. So now if I close this message down and just switch to my personal account, if I create a new email you'll see that I have that signature applied to it.

So a really nice way of being able to include all of your contact details on the bottom of an email when you send it.

That's it on email signatures. Please join me in the next module.

Video: Delivery Options

Deb: Hello everyone and welcome back to this course on Outlook 2019. In this module I'm going to talk to you a little bit further about delivery options. Now we've already looked at a couple of these when we were looking at things like Voting buttons but there are a few more delivery options that I really want to highlight in this particular module.

So what I have on the screen at the moment is an email that I've created. I've addressed it to a contact group. I've attached a document and I've asked people if they could provide feedback on the attached document fairly urgently. Now because this is an urgent email I might want to mark it as high importance so that all of the recipients know when they receive it that it needs their attention immediately. And you do this using a delivery option.

So let's jump into the Options ribbon and you can see at the end here, I'm just going to click this little arrow in the corner of the More Options group which will take me into my Properties. Now this is where we came when we were setting up the Voting and Tracking options because these are essentially delivery options as well.

So what I want to talk about in this module are the other two groups, the Settings group and the Delivery Options group that we haven't discussed as yet.

So right at the top you can see there that we can set an importance on this message. So by default that is set to Normal but as this message is particularly important I want to let people know that it is an email of high importance.

Now underneath this Importance dropdown we have a Sensitivity dropdown. And again most of the time normal will be fine for you, but you do have some other options in there, Personal, Private and Confidential. Now I will say that if you decide to select Personal, Private or Confidential it doesn't change the way the email is processed in any way. All it does is it lets the recipient know that this email is a personal email, this email should be treated with some privacy, or that this email is confidential. So it's really just a warning to the recipient. So maybe if you set it to Confidential they will be extra vigilant about not having it open when other people are around, something along those lines. But with regards to the actual email, the way it's delivered, there is no difference. So I'm happy to keep that on Normal for the time being. And you also have a checkbox there if you don't want to Auto Archive this item. So that's entirely up to you if you want to click that or not.

Now the other group of delivery options are at the bottom here. So the first option here, Have replies sent to. So essentially if I send this message I could choose to have any replies to this message sent not to me but to somebody else. And you might think to yourself, "Well why on earth would I want to do that? I'm the one who's sending the message." The times that I've seen this come into play in a business context would be if a manager is sending out lots of emails but they want their secretary to deal with the responses. So instead of all of the responses coming

back to the manager they might choose put the secretary's name in here and all the responses will be diverted to them to sort out and go through. So that is where I've seen it used in a business context. So that might be something that you want to do and you can just go in and select who you want the reply sent to from your address book.

Now we looked at this option briefly before, Do not deliver before. So again this might be in the context of if you write out a very long email and maybe you don't want it to send for another week, then you could set a date and a time for this message to be delivered. Another scenario might be that maybe you're going away, maybe you're going on holidays and you draft some emails before you go and you want those sent on particular days, you could set this option in order to do that. So a really useful little option.

Now another thing you have in here is Expire After. So you could set a date and a time that this email expires. So this would be useful if you had essentially a response window. So maybe you need to get everyone's responses in by the end of the week and anybody who responds after that their response is basically null and void. So you could set a date and time in here for that mail to expire and it just means that the recipient doesn't waste any time on the mail if it's gone past the expiry date.

And the final option you have at the bottom here is to save a copy of the sent message.

So those are the main delivery options that you have.

Another point worth noting here is that if you click on the Message ribbon you'll also see in the Tags group you have a quick way of selecting high importance and low importance on an email. And because I already set high importance you can see that that is actually highlighted in my Tags group. And I can then click on Send and those delivery options are going to apply. So plenty for you to explore in there.

That's the end of this module. I will see you in the next one.

Video: Sending Automatic Replies

Deb: Hello everyone and welcome back to our course on Outlook 2019. This is Deb and we are still down in section six looking at all the utilities we have for creating and sending emails. Now in this particular module I want to talk to you a little bit about automatic replies or as they're more commonly known Out of Office.

Now if you've never come across this before automatic replies notify others that you are either on holiday or vacation or just not available to respond to email addresses at that particular time. And you can set a date range for your automatic reply. So if you're going on holiday on Monday and coming back on Friday you can tell Outlook that on Friday you want it to deactivate your automatic replies. So let's take a look at how we can set up an out of office or an automatic reply.

Now I've come into the Backstage area by clicking on File and you can see that I'm currently clicked on the Info tab. And towards the top there we have an option for Automatic Replies. So let's jump into there.

So this will open up the Automatic Replies dialog box and this is where you can set everything up. Now at the moment because I am in the office I've got it to send to Do not send automatic replies. However, let's pretend that tomorrow I'm going on holiday. So I'm going to activate automatic replies, I'm going to say only send during this time range, and I'm going to select tomorrow's date. I'm going to say start sending them at 7 a.m. and I'm going away for a week so I'm going to click my dropdown again. I'm going to select the 4th of April and I'm going to say stop sending them at 7 p.m. So basically that date range is the time that I'm not in the office, the time that I'm away.

And then underneath I get to specify what message I want sent to anybody who sends me an email within that time period. So I might want to add something along these lines. So I've put a very brief message in there just saying that I'm currently out of the office on holidays and I'm not contactable during this time.

And what I've also done is I've given them an alternative contact number for any urgent inquiries. And I would suggest that you do do that. If somebody does need some information urgently it's always good to direct to somebody else within your team or maybe your manager.

Now I'm setting up this automatic reply on my personal account. Now if I was utilizing a business account connected to an exchange server then I would have two tabs listed up here. So once I've set my automatic reply when I click on OK this will start sending out in an email in the time range that I've specified up here.

Now one thing to know is that I'm utilizing just a personal account here so I only have the choice of sending one automatic reply. What you may find is that on your account if it's a valid business

account attached to an exchange server you may possibly have two tabs up here, which will allow you to set an automatic reply for business emails and one for personal. So it might be that you want to have two set, which are slightly different, depending on if your personal contacts or external contacts email you or if people within your organization email you. So just be aware of that as well. So I'm going to click on OK and that message will start sending as from tomorrow.

So that's it. Fairly straightforward on automatic replies. That's the end of this module. I will see you over in the next one.

Video: Navigating using Hyperlinks and Bookmarks

Deb: Hello everyone and welcome back to our course on Outlook 2019. In this module I want to talk about how you can utilize hyperlinks and bookmarks in an email, in particular a long email, to help your reader navigate and jump to the sections that are most important to them. Now the best way to demonstrate this is to just show you an example.

So what I've done here is I have a new email that I've created on the screen. What it says in the top is "Hi Marcus, Some info about Microsoft to add to our internal Wiki page." And then you can see underneath I have a horizontal line and I'll show you how I can add those in in a moment. And then I have a whole host of information about Microsoft and then I have some information on the Microsoft founder Bill Gates as well. So this is a reasonably lengthy email. So let's scroll back up to the top.

Now as I said I have a horizontal line in here just separating my message from what I want added into the Wiki page. And if you do want to add something like a horizontal line into your emails it's very simple to do. If you just jump up to the Insert ribbon you'll see the last option you have in the Symbols group is Horizontal Line and that's just going to add a horizontal line across the entire page, cell or column. So just be aware of that as well. It really does help with the layout of your email sometimes.

Now what I actually want to do here is I can see as I read through this information about Microsoft in the second paragraph it says, "Microsoft was founded by Bill Gates and Paul Allen." Now I have a section a little bit further down this email dedicated to Bill Gates. So what I might want to do is I might want to make the words Bill Gates a link and when the recipient of this email clicks on that link it jumps them down to the Bill Gates section. And I could have lots of links to different parts of this email, which makes it a lot easier for people to navigate around a very long email. Now we do this using Links and also Bookmarks.

Now when you're going to do this the first thing you want to do is create the bookmark. So it kind of seems a little bit counterintuitive. You're kind of doing things a little backwards, but the first thing I want to do is I want to jump down to the section I want to link to. So in this case I want this link to jump down to Bill Gates. So I'm going to go down to where it says Bill Gates. I'm going to click in front of his name and I'm going to add a bookmark. So again up on the Insert ribbon, I'm going to go to the Links group and I'm going to click on Bookmark.

I need to select a name for my bookmark so I'm going to say Bill Gates. And you can have any spaces in your bookmark names. I'm going to say Add to add that in.

Now when you add a bookmark it's not visible. So there's nothing on here which would tell me there's a bookmark there. But now what I can do is I can scroll up to this second paragraph and I can essentially link to that bookmark. So what I'm going to do is I'm going to highlight the word Bill Gates, I'm going to go up to my Insert ribbon and this time I'm going to click on Link. So

you can see at the top it says Text to display. So it's just picking up the words I have highlighted, which is Bill Gates and that is absolutely fine. But what I want to do is click on this Bookmark option. Now that's going to show me any bookmarks I've added into this particular email or document. So I can select my bookmark Bill Gates, click on OK, click on OK again and you can now see that I have a hyperlink. And when I click on it, so I'm going to hold down Control, it jumps me down to the Bill Gates section. So if I wanted to throughout this piece of text at the top here I could select different pieces of text and have them all linking to different parts of my email. Again just makes it super easy for people to navigate around an email.

This is also particularly good if you have something like maybe a table of contents at the top. So maybe you have a long email that's explaining steps of a process and at the top you have just essentially a table of contents or just a list of the different sections you could set those up so people can click on the particular link that they're interested in and it will jump them to the correct part of the email.

So this is something I don't see utilized a great deal in emails. I see it utilized more in Word documents, but I wanted to show you this because I think it is a really nice thing to know and really helps your emails look a little bit more professional and more organized. So definitely have a little practice and a little play around with the link and bookmark options.

Now one final point to note is that if you decide that you want to remove any links you can of course highlight the word Bill Gates, right click and then you have options for Remove Hyperlink, Copy, Open, Edit, so on and so forth. So if I was to click Edit it's going to take me back into here.

So that's it. Definitely worth having a little play around with both the link and the bookmark options. That's it for this module. I will see you in the next one.

Video: Practice Exercise 05

Deb: Hello again and welcome back to our course on Outlook 2019. We're now down to Practice Exercise 05 where we're going to practice the skills that we've learnt in the Creating and Sending Mail section.

So the first thing I'd like you to do is to create yourself an email signature and set it to appear on new mails only. I'd then like you to create a brand new email message and address it to yourself.

I'd then like you to attach a file, a document, a photo, or a graphic of your choice. I'd like you to mark that email as high importance and then I'd like you to send that email.

Finally I want you to create a rule that defers delivery by five minutes.

So those are your tasks for this section. See how you get on with those and I will see you over in the next section.

Section 7 – Working with People

Video: Adding a New Contact

Deb: Hello everyone and welcome back to our course on Outlook 2019. We're now down into section seven where we're going to start talking about working with people, and specifically working with contacts.

Now your contacts in Outlook are the people that you contact most frequently. So the first thing we're going to do here is we're going to switch from our Outlook email into our contacts. And if you remember at the bottom underneath where we have our list of folders we have these little icons. And you'll see the one in the middle there is Contacts. So let's click on that icon and jump across to our contacts.

Now the first thing you'll notice is that on the left hand side I can display contacts for each of the accounts that I have attached to my Outlook. And currently I have my contacts for train@debashby and that is the one that I want to use. So make sure that you have the correct account selected.

And what you'll see in the middle there are all of my contacts. So contacts can be internal contacts or even external contacts as well. And you can add as many of them into your Outlook as you like. And you can add all different kinds of useful pieces of information to each contact. So you might want to add in their email address, their job title, the company they work for, their address, all of those kinds of things. And having your contacts set up in Outlook just makes it a lot easier when you want to do things like address emails or look information up quickly.

Now what we're going to focus on in this section is the most basic thing you can do with contacts and that is adding in a new contact.

So as I said, in the middle here I have all of my contacts and if you look at my Home ribbon you'll see the first option that I have is to add a new contact. And you can see that the shortcut key there is Control-N. So let's click on New Contact. And this pops up the New Contact Card. And you can see there just how much information you can add into this contact. So I'm going to add my contact's full name and then I'm going to go through and I'm going to add some more details for my contact. So there we go. I've added some basic information for Harry into the contact card and I can even go in and add a picture for Harry. So if I just click on his contact picture it's going to take me to my local drive. So if I have a picture stored off for Harry, which I do, I can select that picture and add it into the contact card as well.

I also have a section over here for any notes that I might want to add about this contact. So that might be something useful that you want to make sure that you have a note of every time you open this contact card. But I'm fairly happy with how that looks. I can see a preview of the contact card in the top righthand corner and I'm going to click on Save and Close. And you can

see now that in my list of contacts it's added Harry into my contacts. And if I click on Harry's name I get a preview over in the righthand side where I can see his email address and also his phone number.

Now a note about the way that you're viewing your contacts in here. Currently I can see their picture and I can also see their name. And this is being controlled by whichever view I have set in this dropdown menu. So currently I have People listed but I could choose to list them as Business Cards, which shows them in a slightly different format. I could click on Card, which again shows them in a slightly different way. Or I can have just a plain old list. So it's really entirely up to you how you like to display those contacts.

Now another way that I can quickly add a contact is if I receive an email from somebody and they're not currently one of my contacts I can add them very quickly into my contacts list from the email that they sent me. So I'm going to open up this email from Kata and I'm going to hover my mouse over her email address, I'm going to right click and I'm going to say Add to Outlook Contacts. And immediately this will pop up that contact card again and I can go in and I can add more information for Kata if I want to and then when I click Save and Close and close out of this email, when I jump back to my contacts you'll see that Kata is now listed in my contacts. So don't forget that you can add them directly from emails as well.

So that's it for this module. A very quick module just to show you very briefly how you can add new contacts into your contacts list. Please join me in the next module where we're going to look at some of the options you have on the Contact Card. So I will see you then.

Video: Utilizing the Contact Card

Deb: Hello again and welcome back to our course on Outlook 2019. We're down in section seven discussing contacts and in the first module I showed you how to very quickly add a new contact into your contact list. In this module I just want to go through some of the additional features that you have within the contact card. So let's start by just reopening the contact that we just added, Harry Miles. So I'm going to double click to open that contact card.

Now as we mentioned before the first thing you see on here are lots of different fields that you can complete if you have the information. It's worth noting that these aren't all mandator, so you can leave some blank as I have done here. And one useful little feature that I want to draw your attention to first is at the bottom where we have the address for this contact you have a Map It option. And what this will do is if you click on it it's going to look at that address and it's going to find that exact location in Bing maps for you. So this can be really handy, particularly if you're going to a meeting at a client site and you want to very quickly see where that meetings taking place. It will jump you straight into the map and pinpoint that location. So that's a really useful little feature within the contact card.

Now we have a number of different tabs at the top here, the first one being Contact. So we have a Save and Close button which will allow you to save any changes that you've made to this contact card and then close it down. If you want to delete the contact you have that option there and you also have the keyboard shortcut of Control-D to do that. You can choose to save this contact and create a new contact at the same time. So that's a useful feature if you're adding quite a few contacts in a row instead of having to save and close this one down, then create a new contact you can say Save and New and it will save this contact and open up a new blank contact card for you to start adding the next one.

And in particular if you're adding contacts from the same company, so if I was adding more contacts from Microsoft I could choose the second option there. It will create the new contact card for me but that company name will be filled in for me.

Underneath there we also have a Forward option. So if you want to forward this person's contact details to somebody else you can. And you have various different formats that you can utilize. So if I wanted to forward this as a business card it's going to create a new email for me and it's going to attach Harry's contact details. So if I have a colleague who would like to get in touch with Harry that's a nice quick way of me being able to forward all of his details in one email.

Moving along we have a Show button. So this really helps you determine what fields you're seeing for your contact card. So currently I have General selected and for me that's usually more than enough information. But if I wanted to I could switch that to Details where I can add in more details such as nicknames, titles, suffixes, their manager's name, assistant's name, even

their birthday and anniversary dates as well. If I click on Certificates that allows me to add any digital certificates that I have.

And then finally I have All Fields. And this allows me to go through and select any of these groups. So if I go to Address Fields it shows me the ones that I've completed but also gives me every single address field available for contacts in Outlook. So if I really have a lot of information about this particular contact I could go through and I could start adding that in there as well. Now as I said, a lot of the time this is overkill but just be aware that it can hold that amount of information if you want it to. And you have all different kinds of groups in here as well. So email fields, so if they've got more than one email address, different email address types, so on and so forth. So that is your Show button. Now I'm going to keep mine on General.

The next little group is a quick way of sending this contact an email or arranging a meeting with them. So if I want to email Harry I could just click on the Email button, it's going to open a new email addressed to Harry. The same thing if I wanted arrange a meeting with Harry. I can click on Meeting and that's going to open up a new meeting invite. Now we haven't covered the calendar or meeting invites yet so we'll revisit this when we get to that section of the course.

And then finally we have a More dropdown which will allow us to call Harry if we want. So we can call using any of the numbers that we have listed in the contact card. So if I was to click on his busines number it pops up this little New Call dialog box and I can say Start Call if I want to. So these are really ways to communicate with your contact.

We then have the Address Book option. And again this just allows me to see all of the addresses that I have within my address book from this particular contact.

Check Names we've used previously and that is a way to resolve an email address. So as it says there in the screen tip it will check the names and email addresses you have typed to make sure that it's possible to send messages to them. So if you remember what I said is if you type in an email address and it doesn't come back with an underline there might maybe be a possible problem with that email address. So if you click within it and click on Check Names it will tell you if it's able to resolve that email address.

We then have a business card option. So this will allow you to edit the business card. So this is what the business card looks like and you can see the information that I have displayed in this business card. So if I wanted to change the way this is laid out I could. So for example, I could say I want the image on the right. I might want to change that background color so I'm just going to change that to a lighter gray. I could come down here and I can edit what I'm actually seeing. So I don't have to have his full name displayed. I could change that there. I could also make some various formatting changes as well. And I might want to change that name to a white colored font, like so.

Now I can also edit the information that I'm seeing in here. So at the moment I have his company, his job title and I have some phone numbers, but if I wanted to I could maybe get rid of his home phone number. So I can click on Home Phone Number and say Remove. And that's going to get rid of that home phone number. So you can really go through and customize by adding or removing any of these fields to really get the information that you want to display on the business card. So don't forget that you have that option as well.

You can go in and you can change the picture that we've set for Harry from here just by picking it up from your local drives and you can do things like categorize your contacts. So if Harry is working with me on Project Alpha I might want to assign him to the Project Alpha category. I could also set a follow up flag if I need to follow up with Harry on anything. And if I want this contact to be private, so that means that anybody else who has access to my calendar or contacts if I don't want them to be able to see this information I could choose to set this contact to private.

The Update button allows me to do a quick update to this contact with any details from my organization's address book. And I also have a Zoom button if I want to zoom into this contact a little bit more. So lots of different features on there.

Now I'm not going to go through all of these ribbons but I will say that if we jump across to the Insert ribbon there are lots of different things that you can insert. However, if I'm clicked in one of the address fields or in any of these fields you'll see that most of these options are grayed out. They only become active when I click in this Notes field. So when I click in Notes I can then do things like add tables, I can add pictures, online shapes, icons, we could add links, bookmarks, quick parts, all kinds of different things but those are only active when you're clicked in this Notes field.

You also have a Format Text ribbon. So again this will mainly apply to Notes. If you have any written notes in here you can definitely format those. And then you have a Review ribbon which allow you to check things like spelling and grammar.

So those are the main things that I wanted to point out to you that are available for you to edit on the contact card. Once you're happy with the changes that you've made just click on Save and Close to save those changes. That's it for this module. I will see you in the next one.

Video: Creating a Contact Group

Deb: Hello again and welcome back to our course on Outlook 2019. We're still down in section seven where we're talking about working with people and utilizing contacts. And we've seen so far how we can add new contacts into our contact list and how we can open those contacts, change the information and edit that contact card. In this module I want to talk to you about Contact Groups.

Now contact groups are a really good thing to set up if you email a certain group of people all the time. So again an example might be if I'm working on a project with four or five members of my team and we're always sending emails back and forth between us instead of creating a new email and typing in each of their individual email addresses each time I could create a contact group which contains all of their email addresses and just sends the email to the contact group. So it makes me a lot more efficient when I'm sending emails to a larger group of people.

And I already have a contact group set up in my contacts and it's this one here, Project Alpha. And if you look over in the righthand pane you can see that that group has two members assigned to it, Jasmine and Marcus.

And it's very straightforward to set up a contact group. We're jumping up to our Home ribbon and you'll see that there are two options and this can be a little bit misleading. There is New Group and there's New Contact Group. And the one that we want in this specific scenario is New Contact Group. So this is going to open up the Contact Group window and the first thing we need to do is assign a name for our group. So I already have one for Project Alpha so I'm going to set up a contact group for Project Beta. And what I'm going to do is I'm going to add some members into this contact group.

Now if you look up on the Contact Group ribbon in the Members group we have an Add Members dropdown and I'm going to say I want to add them from my Outlook contacts. So I can now go in and I'm going to select Adam, I'm going to select Harry, Kirsty, Marcus, and Stacey. I'm going to click on Members and it will add all of those email addresses in and click on OK. So I've now added five members into this group.

Now you'll also see whilst we're in here we have various other options. So I can remove members from here as well, I can delete the entire group, and I can also forward this group on as well. Now all I'm going to do here at the moment is say Save and Close. And what you'll see is that now it's added that contact group into my list of contacts and I can see on the righthand side all of the people that are in this particular group.

Now if I wanted to send an email to all of these people all I need to do is come up here, click on the little envelope icon and it's going to send a mail directly addressed to Project Beta. Now if I click that little plus next to Project Beta to expand the list it's going to show me all of the individual email addresses that this email is going to. So it's a really quick way of being able to

email multiple people at the same time. And again if I was working in my email and I've created a new email, if I want to address it I just click on the To button, I make sure that I'm clicked in my Contacts and there is Project Beta. So I can select it, click on To, click on OK, and that's addressing that email to that particular contact group. So very nice and simple.

And once again you can make as many contact groups as you like. And if we go back into that contact group you'll see here if I wanted to set up a meeting with all of these people I have a Meeting button there which will allow me to do that and it's going to send out a meeting invite to anybody who's within that Project Beta group. So super simple to set up contact groups.

I'll leave you to have a play around with that and I will see you in the next module.

Video: Managing Contacts using Folders

Deb: Hello again and welcome back to our course on Outlook 2019. We're still talking about contacts in this section and I just want to finish this up by showing you some options you have for organizing and managing your contacts.

Now currently we've added in Contacts and Contact Groups and they're just showing in one big long list. Now I don't have a great deal of contacts listed here so it's fairly easy for me to scroll up and down and find the contact that I'm looking for. However, you'll probably find that you will have maybe hundreds of contacts listed. And to make your life a little bit easier one of the things you can do is organize them into different folders. So I just want to show you very briefly how you can do that.

So if we cast our eyes up to our ribbons you'll see that we have a Folder ribbon up here and the first option we have is New Folder. I'm going to make sure that I'm clicked on the correct item. So I'm in my mailbox and I'm clicked on Contacts and I want to create a folder for all of my Project Alpha contacts and I'm going to click on OK. And you can see it creates a nice little folder over on the left hand side. So what I can now do is essentially grab some of my contacts and move them to that particular folder. So I'm going to grab just the top four here, I'm going to drag and I'm going to drop them onto Project Alpha. So now when I click on that I have all of my Project Alpha contacts.

It could be that I might want to make another folder with the same contacts. So maybe these people are also working on Project Beta. Now a quick way of me doing that is to copy this particular folder. So I'm going to say Copy Folder, I'm going to say OK and you can see there now it says Project Alpha Copy. And what I can do is I can click on it, I can say Rename Folder and I'm going to rename that to Project Beta. And I now have those same contacts in Project Alpha and Project Beta.

I'm going to create one more folder and again we're going to put this under Contacts, I'm going to call it Project Delta, and I'm going to move the rest of my contacts into Project Delta by dragging and dropping. And there we go. So now instead of an overwhelming list I have my contacts divided down into separate folders. Now you definitely don't have to do this. If you would prefer just to have them all in one list that's absolutely fine but just be aware that you do have the option to organize your contacts much like you might organize your email into different folders.

Don't forget also that you do have a Search button at the top here. So again if you're looking for a particular contact you can utilize that search in order to find them. And much like we've seen before when we were looking at email you have your Search Tools contextual ribbon at the top which will really help you define what it is that you're looking for.

Now one useful thing that I want to end with just here is sharing your contacts. So it might be that I have a new team member who is going to be working on Project Alpha. And in order to help them out a little bit I want to send them all of the important contacts for Project Alpha. So what I could do is I could select Project Alpha in my contacts as I have done here and I could share my contacts. And again you'll see on the Home ribbon in the Share group you have a Share Contacts option. And that's going to essentially open an email, it's going to attach a sharing invite, and you can see here that I'm sharing the Project Alpha contacts. I can then address that to whoever I'm sending it to and I'm just going to send it to myself. I can send that off and you can see here it says Share this Project Alpha contacts folder with Deb Ashby and I'm going to say Yes. And that means the recipient is then going to have access to those particular contacts.

So very simple to organize your contacts into different folders. You can rename your folders, you can copy them, and you can also share your contacts with other people.

That's it for this module. I will see you in the next one.

Video: Practice Exercise 06

Deb: Hello again and welcome back to our course on Outlook 2019. We've now made it down to Practice Exercise 06 where we're going to practice the skills we've learnt in the Managing and Creating Contacts section.

So the first thing I'd like you to do is to create two brand new contacts called Harry Potter and William Shakespeare. I'd like you to add the contacts job titles, company, email address, and phone number. And I just want to point out here these don't have to be accurate and you can make up fake email addresses and phone numbers.

I'd like you to add a photo for each of these contacts and then I'd like you to save those contacts to your contacts list.

I'd then like you to create a contact group and call it British Icons.

And finally I'd like you to add Harry Potter and William Shakespeare to that contact group.

So again quite a few tasks for you to practice there. So see how you go with that and I will see you over in the next section.

Section 8 – Working with the Calendar

Video: Overview of the Calendar and Views

Deb: Hello everyone and welcome back to our course on Outlook 2019. We're now moving down into section eight where we're going to start talking about your calendar. Now the calendar is a very important feature in Outlook and we have dipped into it in a little bit in previous modules.

So we've seen before how we can pull up a little mini preview of our calendar by jumping to the View tab and utilizing the To Do bar and selecting Calendar and that gives us just a little mini preview of our calendar, which can sometimes help us when we're responding to emails and trying to schedule events. But if we want a more comprehensive look at our calendar this probably isn't the best way to view your calendar. You're probably going to want to across into your dedicated calendar in your email account.

So again a quick way of doing that is if we cast our eyes underneath our Folders list to our icons running across the bottom the second one along if I hover my mouse over is the Calendar. And you can see that again I get a little mini preview of my calendar. So I'm going to click on this icon and jump across to it.

So this is what my calendar currently looks like. And you'll see that we're now in a completely different part of Outlook and we have completely different ribbons running across the top with different options for managing our calendars.

Now in this module I really just want to give you a quick overview of what we're looking at and just show you some of the different ways that you can view your calendar. And then in the following modules we'll delve a little bit deeper and I'll start showing you some of the things you can do with your calendar and how you can utilize it to keep on top of all of your events, appointments and meetings. So let's take a look at what we're looking at on the screen so far.

So I currently have my calendar and I'm viewing the entire month of March 2020. And you can see in the middle there any appointments or meetings that I currently have scheduled. And some of them are color coded, depending on what they relate to. If you cast your eyes over to the left hand side of the screen again we have a mini view of our calendar and I can actually use this to navigate around. So if I want to jump to earlier in the month, so let's say the 2nd of March I can do so and it will essentially zoom me in and change my view to Day View. And you can see that just above on the ribbon and that lets me see just that day, which is sometimes a little bit easier than viewing everything in Month View.

What you'll also see in this mini calendar is that I can scroll back and forth. So if I want to see events that I have running in April I can just by using these little arrows at the top here.

Now again I'm currently in that Day View and if you have a look up on the Home ribbon in this Arrange group you can see that that's the one that's selected. Now I'm actually going to switch back to Month View so I can get an overview of the entire month of April. So just remember that you do have these scrollers so you can scroll through and look at different months within your calendar.

What you'll also notice with this little mini preview is that some of the dates are showing in bold and those are literally just to highlight to you the days of the month where you have meetings or appointments scheduled.

Then underneath there we have which calendar I'm actually viewing. So remember if you have multiple accounts attached to your Outlook, so again I have this is my business one and then I also have my personal one. You can view calendars for those accounts all together in your Outlook calendar. So currently I'm just displaying the calendar that's related to my business account. But if I also wanted to display my personal calendar all I would need to is to check the box and you'll see that I now get a side by side version of my calendar. So this is a great way of being able to compare and contrast different calendars that you might have set up. Now for the moment I'm going to untick that one and just focus on our business calendar.

Now underneath there we have Shared Calendars. So again this is something that you can do. you can share your calendar with other people. So one scenario for this might be if you are a manager and you have a secretary you might want your secretary to always be able to keep on top of your appointments and meetings and even schedule appointments and meetings on your behalf. So you'll probably want to give her access to your calendar. And you can do that using the Share Calendar option at the top here and that will allow you just to share your calendar with whoever you wish. And you can select how much of the detail you want them to see. So if you're happy with them seeing everything you could select Full Details.

So similarly if somebody shares their calendar with you it's going to appear underneath your shared calendars list.

It's also worth noting that there are calendars in Outlook specifically related to holidays. So I'm actually quite interested in when the holidays are in the United Kingdom so I could choose to display that calendar if I wanted to. I'm going to untick that and you can see that I have access to Marcus's calendar. So again if I tick that one I can see Marcus's calendar showing in that righthand pane.

And you can display more than two calendars. You can have three calendars showing side by side if you want to. I would say that any more than three does kind of tend to get a little bit chaotic, a little bit squashed up and make it hard for you to see things.

Now one way you can get round that, I'll show you this very quickly, is that you can merge two calendars together. So if I don't want Marcus's calendar to show next to mine I could merge his

appointments into my calendar. And all I need to do to do that is go to Marcus's calendar and you can see we have this little arrow. And you can see there it says View in Overlay Mode. So if I click that it's now going to merge mine and Marcus's calendar together. So sometimes again that's a little bit easier to see than having appointments side by side. And it's very easy to undo that as well. You just click on the little arrow again and it'll put it back to side by side mode. So don't forget that you have that overlay option for any calendars that you have open.

Now again I'm just going to take the tick out of Marcus dash so we can just see my calendar.

And finally at the bottom here we have all group calendar. So this would be if you are working with Office 365 and you have Office 365 Group Calendar set up you can also view those down here. Now I'm not going to get into that too much because this is an Outlook 2019 course as opposed to an Office 365 course but I just wanted to highlight that so you know what those group calendars are.

Now a couple of important things to note here when we're looking at our calendar, as I said just be aware of all of these options in your Arrange group. This will allow you to view your calendar by day, by work week, so by work week we mean whatever you've set your work week to. So that might be Monday to Friday for some people, that might be Monday to Saturday for others. People's work weeks can vary. Now you can see currently mine's showing Monday to Saturday. Now if I wanted to change that to Monday to Friday because that is my work week I would need to do that in my Settings.

So let's jump up to File, go down to Options and we're going to jump down to Calendar. And this is where you can define your work week. So I can define my starting time and my end time. So in general I do 9 to 6 every single day and then my work week I can see that I have Monday to Saturday ticked. So I'm going to change that. I'm going to untick Saturday and just say that my work week is Monday to Friday. And you can also specify what day of the week you'll want your calendar to start with. Now some people prefer to start on a Sunday. I actually like to have my calendar starting on a Monday. And click on OK and there we go. So I now have my calendar showing Monday to Friday when I'm in work week view.

And you can see as I hover over each of these there are keyboard shortcuts. So Control-Alt plus 2 in this case to switch to work week view. The other views we have are Week, so this is going to include those weekends as well. We then have Month view which in general is the view that I find myself working in most often. And then there is also Schedule view as well. So this kind of puts your meetings and your appointments in a horizontal scroll so you can scroll across and see what you have. So Schedule view is another way that you can view your calendar. Now which one you prefer is entirely up to you but the main takeaways here are how you can switch between the different views, how you can modify what you're seeing by jumping into those backstage options and changing them, and also how you can view other calendars side by side and also merge them together using that overlay feature.

That's it for this module. I will see you in the next one.

Video: Customizing the Look and Feel

Deb: Hi everyone and welcome back to our course on Outlook 2019. This is Deb and we are down into section eight where we're exploring all of the options related to calendars in Outlook. In the previous module we looked at the basic overview of the calendar views and I showed you how you can view calendars side by side or in overlay mode and I also showed you some options that you have for adjusting the settings in the backend to change exactly what you're seeing when you look at your calendar. We're going to take those customizations a bit further now and I'm going to show you some different ways that you can format calendar and really set it up tailored to the information that you want to see.

Now the first thing I'm going to show you is something I didn't point out to you in the last module is that if we look at this little pane on the left hand side you can actually drag this line. So underneath our little preview of our calendar there is a line there and you'll see as I hover over I get that double headed arrow. Now I can drag that down and it will allow me to display more months of my calendar. So a lot of the time I'll have sort of a lot of these groups at the bottom here closed up or collapsed which gives me a little bit more room and I might want to display even three months if I want to. Now I prefer two but just remember you can have it like that.

You can also do the same with the vertical bar and you can drag that out or drag that in and that will allow you to display more months of your calendar as well. So again set that up to personal preference. You may like to have four or more displayed or you may just be happy with just one or two. It's entirely up to you.

Now let's look at something very basic and that is changing the color or the look and feel of your overall calendar.

You'll see that I'm currently clicked on the View ribbon and in the middle there we have a Color dropdown. And we have a few different colors within a palette that we can choose. So again you'll see as I go through some of these it just changes the kind of general overall look and feel of the calendar. So again this is entirely personal preference.

Now some other customization options that you have are available in the backstage area again. So let's jump up to File, go down to Options, and I'm going to jump across to our Calendar section. Now I'm going to scroll down to this section here, Display Options. So again we have that default calendar color which we could change in here if we wanted to. And I could say use this color on all calendar. So any calendar that I open if I want them to all be the same color I could choose that little option just there.

The next option is Show week numbers in the Month view and in the Date Navigator. Now this option can sometimes be really useful. So the first week of the year will be week one, the second

week, week two, and if you want to display that visually in your calendar make sure you have that option checked.

Now another thing that I think is very important in here is setting up your time zone. So you can see here it says Time Zone and then it has my time zone. So I'm located in London and I might want to label this time zone as London. Now what you can also do in Outlook is show a second time zone. So for example, a lot of my clients are based in America so I might want to have the U.S. east coast time showing in my calendar as a second time zone. So I could say something like this, U.S. East Coast and then I could go in and select Eastern time U.S. and Canada in here. So when I click on OK you can now see those changes I've made taking effect. So the first thing that's most obvious is that I now have the week numbers running down the left hand side of my calendar. So you can see week nine, ten, eleven, twelve, so on and so forth.

Now if I jump into Day view what you'll also see now is that I have the London time and I also have the time for U.S. East Coast. So sometimes this can be really helpful, particularly if I'm organizing maybe an online training session for customers located in the UK and also in the U.S. This just helps me have a little bit of a better understanding so I don't accidentally schedule a training course to run at 3 a.m. in the morning for all of our American friends. So this can be particularly useful if you have to deal with people in different time zones. So don't forget about that time zone option that you have as well.

Now another thing that you might be interested in, or you might not be, is you can display weather in your calendar as well. So again we're going to jump into File and we're going to go down to Options and we're going to jump across to Calendar and we're going to scroll all the way down to the bottom and you'll see we have a section there for weather. Now currently I don't have the weather showing on my calendar but if I want to I can select this little box, I can choose how I want to show my temperature. So in Europe the temperature is normally displayed in Celsius and in North America it's invariably displayed in Fahrenheit. In the UK we tend to switch between both of them so I'm going to go with Celsius in this case and I'm going to click on OK. And you can see there now at the top of my calendar it's picked up my location and it's telling me what the weather is like for today, for tomorrow, and for Thursday. And if I want to get more details on that I can say See more online and that's going to jump me to MSN Weather where I can take a more detailed look at the weather for the next few days.

Now if you happen to want to change your location you can just do that by clicking the dropdown and you can say Add Location. And maybe I want to see what the weather is like in New York, click on the magnifying glass to search, select the correct one from the dropdown and there we go. I now have weather displayed for New York and I can easily switch between any of the locations I've searched for before. So again this is great if you're maybe going on a business trip somewhere or even if you're going on holiday and you want to keep an update on what the weather is going to be that's quite a nice little option to quickly switch between those locations.

Now those are the main options that you have when it comes to customizing the overall look and feel of your calendar. You'll see also as we start adding calendar items in, so appointments and meetings, you can do things like change the color and things like that to really kind of jazz up your calendar, make it look a little bit less boring.

I will point out again though once more that if we go to File and down to Options in the General tab you can actually change your Office theme. So again if you want to make your calendar look a little bit more dramatic I could change this to the dark gray theme, click on OK, and then it looks something like that. Now you may not like that. And just remember that if you do apply a theme it's going to go through to your inbox, your contacts, your tasks, everything within Outlook. It's not just specifically for your calendar. But I just wanted to highlight that because we did mention that at the very start of the course and some of you may have forgotten about that option, so I just wanted to mention it once more.

So that's pretty much it on customizing the look and feel of your calendar. I will see you in the next module.

Video: Creating an Appointment or All Day Event

Deb: Hello everyone and welcome back to our course on Outlook 2019. We're still in section eight where we're taking a look at all things related to our calendars. And so far we've been through a bit of an overview of our calendar and we've also seen how we can customize some of the elements, customize the look and feel I should say.

In this module we're going to talk about probably the most important thing when it comes to calendars and that is scheduling appointments or all day events.

Now there's something that you need to note about scheduling things into your calendar. You have appointments, you have all day events and you have meetings. And how you schedule them is slightly different. Now we're going to look at meetings in the next module. In this module I want to concentrate on appointments and all day events.

So what I'm going to do is I'm going to go down to Thursday the 2nd of April, so right at the bottom here and I'm going to schedule an appointment for that day. So what I need to do is click on that day, I'm going to go up to the Home ribbon and I'm going to select the New Appointment button. And again keyboard shortcut Control-N. And this is going to open up the New Appointment window. Now an appointment differs from a meeting because a meeting has participants. So with a meeting you invite other people to that meeting. With an appointment this is simply for you. It doesn't go out to anybody else. So for example, if I have a doctor's appointment to schedule I might put that in as an appointment as opposed to a meeting because not everybody needs to know about my doctor's appointment. Or maybe I want to schedule into my calendar an hour for learning, so maybe catching up on the latest developments in my industry. I could use an appointment for that as well. So it's going to show other people that I'm busy for that hour but it's not a meeting where I've invited other people to it. So that's the difference between an appointment and a meeting.

So the first thing we need to do here is we need to add a subject for our appointment. So I'm going to do exactly that. I'm going to say Learning Time. Now again filling in an accurate location is important, particularly when it comes to meetings and I'm going to speak about this a little bit more when we get to do meetings but for me I'm just going to be doing some e-learning at my desk so I'm just going to say At desk as my location. The start time is the 2nd of April and I'm going to do this in the afternoon where I have a little bit of free time and I'm going to say 3 p.m. to 3:30 p.m. I'm going to spend that time catching up and doing some learning. And then I might want to put a little description in here so anybody who's looking in my calendar knows exactly what I'm doing. So Learning time, something along those lines.

Now what you'll see here is that there is a little checkbox that says All Day Event. Now if I was to check this you'll see immediately it grays out those timings. And this is the difference between an appointment and an all day event. So if you have something that's going to be

running all day, so again if I was going out for the day to maybe a training course I might schedule that into my calendar as an all day event because I'm going to be out all day. And that will show that I am busy for the entire day.

Now in this case I'm just spending 30 minutes learning so I don't want it to be scheduled as an all day event. I just want it to be an appointment which occurs between 3 and 3:30. So just remember that. That checkbox really is the difference between scheduling just an appointment and scheduling an all day event.

Now of course as with everything in Outlook I could add things like documents into the body here. So you can see that we have an Insert tab where we can attach all of the things we would expect to be able to attach in a Microsoft application. So pictures, shapes, icons, I can attach files, business cards, other Outlook items, all of that kind of stuff you're used to seeing across the Microsoft applications.

I also have a Format Text ribbon in here if I want to change the way that this looks at all. I could go up to here, change it to Arial, make it red, do whatever I want to that. I have all of my formatting options available. And of course I always have my Review ribbon to check any spelling and grammar. And again spelling might not be that important if this appointment is just for yourself, but probably a little bit more important if you are scheduling meetings which are going to be going out to other people. So just be aware of all the options you have for adding other items into your appointments.

Now for this one I'm going to click Save and Close. And you can see now if I look at my calendar and I'm in Month view here on the 2nd of April that's now been scheduled into my calendar. If I want to edit that I can just double click to jump back in there and make any changes that are required.

Now what you'll also see here is in Options it says Show as Busy. So in between 3 and 3:30 my time is going to be shown as busy to anybody who has access to my calendar. So if someone is trying to schedule maybe a meeting and include me, if they have access to my calendar and they look at it they can see that I'm busy between 3 and 3:30.

Now another important thing in here is Recurrence. And you can see that we have a Recurrence button. Now what I could do is I could schedule this item to repeat regularly. So maybe every Thursday between 3 and 3:30 I take half an hour out of my day to catch up with developments in my industry and I want to make sure that I have that time blocked out in my calendar every single week. So instead of going in to every Thursday throughout my calendar and adding in this appointment I can just set this up to recur by clicking the Recurrence button, Control-G shortcut key.

So you see here it's telling me that my appointment time is 3 to 3:30. It's 30 minutes long. And it's asking me how often do I want this to recur. So I want it to recur weekly, every Thursday.

And you can see it's already ticked the box for Thursday because it's picking up the information in this current appointment.

I can then say for how long I want this to carry on recurring. So it's starting on Thursday, the 2nd of April and currently it's set to run until the 17th of September. Now that might be far enough into the future for me. I could say End after 25 occurrences. I could modify that or I could say no end date, which just means it's going to be continually scheduled into my calendar. Now I'm going to review this around the middle of the year so I'm happy for it to end on the 17th of September. And I'm going to say OK. And you can see now it's added Recurrence occurs every Thursday effective 2nd of April until the 17th of September from 3 to 3:30.

So if I now click on Save and Close and go back to my calendar you'll see that if I jump to April, and I'm just going to use the scroller on my mouse to scroll down one, you can see that now every week on Thursday I have that learning time scheduled in. So that's a lot quicker using that Recurrence button than having to add them all in manually.

Now if you do have recurrence set what you'll then see is if you try to go back into any of these appointments, if I double click, it's going to say Do you want to open just this one or the entire series. So if I want to make an edit on maybe just this one, so maybe I decide that on Thursday I actually don't want to do this learning time at 3 to 3:30. I want to do it 3:30 to 4 but only for this week. So I want to change just this one. And I can go in and I'm going to change the time from 3:30 to 4. I'm going to click Save. And you can see that the time for that one has now been changed but all of the others have been left the same. If I wanted to change them all I could have double clicked and said the entire series, then I could have made my change and it would have applied to all of them. So again just be aware of that.

So very simply that is how you add a new appointment into your calendar. Now just very quickly to finish off this module I will show you that other option, that all day event that I was talking about.

So let's say on Friday I am having some Excel training and the location is the Excel Training Center. And this is going to be an all day event so I've got that ticked in there. I'm going to click on Save and Close and you can see that that's now scheduled in my calendar. Now if I switch to Week view you'll just see how different these look. So when you schedule an all day event it's going to put the event right at the top of your calendar just here. It's not in any particular time slot because it's an all day event, whereas our learning time has been scheduled at a specific time and I'm seeing that in my calendar. So just be aware of that.

So that is it. We've seen the difference between appointments and all day events, we've seen how to add them into our calendar, we've seen how to make them recurring, and also how we can edit one or the entire series. In the next module I'm going to talk to you about the other item that you can add which is Meeting, so please join me for that.

Video: Creating a Meeting and Inviting Others

Deb: Hello everyone and welcome back to our course on Outlook 2019. We're down in section eight looking at all things related to calendar. And in the last module we looked at how you can add appointments and all day events and how you can make things recurring. In this module I really want to show you how just to set up a meeting and invite other people to your meeting.

Now before we jump onto that just a couple of other little tips with regards to items in your calendar.

Now you'll remember here that I added in this all day event for my Excel training. Now something that you can do is you can utilize categories. So if you remember back to when we were talking about email we set up all of these different categories. And you can set these up depending on what's appropriate for you. But you can apply categories to calendar items as well. So this is training so I might want to assign this to the Training category. Now I could go up to Categorize up here and select it from this list. Alternatively I could right click my mouse and you'll see that I have my Categorize option and I can then select Training. And that's going to color code my calendar items depending on what category I've selected. I might want to do the same thing for this item. So I can right click, Categorize, Training. And you'll see that because this is a recurring item it's changed the color of all of them.

Now again remember categories are particularly useful when you're searching and you can also utilize them when searching in your calendar. So if I click on Search up here I could search by categorized items. So if I want to see everything for Project Beta I can click it and it shows me that every Wednesday I have a Project Beta meeting set up. So again really important to categorize your items in your calendar. It just makes it a lot more efficient for yourself.

So with all that said let's move on to scheduling meetings.

Now I'm going to jump across to April in my calendar and I'm just going to switch back to Month view. And I'm going to schedule a meeting for me and my team on Tuesday the 7th of April. So again I can just click on the 7th, go up to the Home ribbon and I have a New Meeting button.

Now the way that this differs from when we create a new appointment is that you'll see that we have a To field in here. That didn't exist when we were doing an appointment because we don't invite people to appointments. So what I can now do is I can click on To, I can go to my address book of contacts, let's say Project Alpha, I can select all the people I want to invite to this meeting, so I've just held down my Shift key to select everybody, and I can choose whether they are required, optional or resources. So everybody here is required and I'm going to say OK. And that puts their email addresses into that To field.

Subject is going to be Project Alpha Strategy Planning. Now the location, now this is probably going to be in one of our meeting rooms at the office. Now what you might find is that in your organization that your meeting rooms are attached to your Outlook. It might be that your administrator has set it up so that you can click your dropdown just here and you'll see in it all of your meeting rooms at your organization. So if you have that that's great. You can just select the location from the dropdown. Now I don't have that but I'm going to select one that I've added in manually before, Meeting Room A. You can just retype into here. You don't have to select from the dropdown.

Now the start time for this meeting is going to be 10 a.m. and it's going to run until lunchtime, so 12 in there. And again what I might want to do here is maybe insert any related documents or notes that it's worth the team reading up on before we go to the meeting. So I'm in the Insert ribbon. I'm going to say Attach File. And at the top there I have my Project Alpha strategy document. Remember at the bottom here you have Browse this PC, so you can navigate to the folder where you have your documents stored. And that just attaches that document.

Now again what I might want to add into the main body here is just something that says, "Hey Everyone, Please could you read this document ahead of the meeting." And again I find myself typing that fairly frequently. So as we've seen before I've actually saved that text as a Quick Part. So I'm going to go up to Quick Parts. There's my piece of text and it just makes it super quick for me to insert that in. And we saw how you can add items to Quick Parts in an earlier module. So if you can't remember how to do that please go back and review that module.

So I'm now happy with how this looks and I'm going to click Send. And what it does is it puts it into my calendar and it's going to send a meeting invite out to all of those people and they can choose whether they want to accept that, decline it or even propose a new time.

And you can actually keep track of who has responded and what they've responded with by this Tracking button just here. So make sure that you're clicked on the meeting and then in the Calendar Tools contextual ribbon click on Tracking. It's going to show all the people that you've sent that meeting invite to and it's going to show their response. So at the moment I've just sent it, nobody has had any time to reply yet so it says None. But over the next few minutes I would expect some responses start to come in and I'll see either in here Accept, Reject or maybe Propose a new time. So the tracker is a great way of keeping track of who's going to be attending your meeting.

So if I actually jump to my personal calendar. So I'm going to untick this one, I'm going to switch to my personal calendar you can see that I have a residents meeting in here. And if I double click to open that and click on Tracking and View Tracking Status you can see there that one of the attendees has responded and they've accepted that meeting request. So that's what it looks like when someone accepts. So this is a great way of being able to keep track of who's going to be attending.

Now another feature that you can utilize when scheduling meetings to help you see who is available and when before you send that meeting out is the Scheduling Assistant. So I'm going to very quickly create a new meeting on the 14th of April and I'm going to click on the To button, I'm going to jump to Project Alpha and I'm going to select everybody in this list again. I'm going to click on Required and OK. Now before I decide on a date and time what I can do is check the Scheduling Assistant. And as you can see here by the screen tip it says Find the best time for your meeting by checking other people's calendars.

Now when we click on Scheduling Assistant what you'll see are all of the people listed in the To field for your meeting and then you'll be able to see when they are free. Now you'll notice that for the bottom three here I have these diagonal lines running through. And if you look at the bottom there's a bit of a key which tells you what everything means in this grid. So I can see here it's telling me that there's no information for these three people. Now this is because these people that I've invited aren't in my organization, they're not within my network, so Outlook can't pull through their calendar information. Now I will say this really just a consequence of the way that I am showing this demo. This is a demo account. It's not part of an organization. But what you'll more than likely see is that if you are working within an organization and you're inviting team members or other people in your organization to a meeting what you'll be able to see here are any times that they are busy. So again if we look at the key at the bottom busy times are shown in blue. So just as an example the top one here is showing that between 11:30 and 1 there is a Project Alpha meeting that this person is attending. So they are essentially not free during this period of time. And you're more than likely going to be able to see that for everybody in your meeting invite. You won't get this No Information unless it's somebody outside of your organization.

So what this Scheduling Assistant can help you with is that you can look through and you can find an appropriate gap where everybody is free. And you can move this blue bar simply by dragging it. So if I decide that 3 o'clock in the afternoon is better I can drag my meeting to there. And as long as everybody is free in this little block that's going to be a good time to schedule this meeting. So the Scheduling Assistant can be really, really useful.

So I can do that. I can close it down. I'm going to say Save Changes but don't send just yet.

So all in all really simple to set up a meeting invite, invite participants and also use that Scheduling Assistant to make sure that you're scheduling at a time that is available to everyone.

That's it for this module. I will see you in the next one.

Video: Responding to Meeting Invites

Deb: Hello everyone and welcome back to our course on Outlook 2019. In this very short module I just wanted to show you how to respond to meeting invites that you receive.

So you'll see here in my calendar on April the 9th I currently have a meeting that I've been invited to but I haven't yet responded to. So I haven't told the sender if I accept, if I decline, if I'm proposing a new time, so on and so forth.

Now as soon as I'm sent the meeting invite it will show in my calendar but it'll be slightly faded out. So you'll see there's a big difference between the way that the item on the 9th is displaying and the way that the item on Saturday the 4th is displaying. The one on the 4th has a solid green bar running down the left hand side, whereas the one on the 9th has these kind of diagonal lines again. So that is showing that that is tentative in my calendar because I haven't made a decision yet as to whether I'm going. Now as soon as I do decide that will become a permanent entry in my calendar.

Also what will happen is I don't have to keep my eye on my calendar for these tentative notices to pop up. I will also receive an email in Outlook when I've been invited to a meeting. And this is probably going to be your first indication that you have been invited to participate in a meeting. And you can see the top one there, this is the invitation to that particular strategy meeting.

Now there are a couple of different ways I can do this. I can respond directly from the email. Now a lot of the time this is probably the option that you're going to go with because we're in our email most of the time. You'll see the email come in, you'll open it up, and you'll make a decision as to if you're going to be attending that meeting. So most of the time you're probably either going to accept, decline, tentatively accept, or maybe even propose a different time. So you could utilize any of these options in here.

Now let me jump back to the calendar again. And if we double click to open this tentative meeting you'll see again we also have on the Meeting ribbon this Respond group which will allow us to accept, decline or any of these other options.

Now if I was to accept I could choose to edit a response before sending. So maybe I want to add some comments before I accept. I can just send the response now which will just tell the creator of the meeting that I've accepted, or I could say Do not send a response, which is a little bit rude if you've been invited to a meeting.

The next option I have is tentative. So again, this might be one that I want to edit the response before sending. So if I'm not sure if I can attend, maybe I want to elaborate a little bit more on that to let the organize know why I'm not sure if I can attend. We then have a decline option, which if you know that you can't go you're probably just going to say Send the response now

and decline it. Or alternatively you could propose a new time. So you could say tentative or propose a new time or you could decline it and propose a new time. So if I was to select Tentative and propose a new time it's going to open up this little scheduler again. So if I can't make that particular time I might want to use the scheduler and propose a completely different time. So I could move this little bar. So maybe I might want to say to them I can't do that time but I can do between 10 and 11.

Now another option that's quite useful in this scheduler is this Auto Pick Next. So again if you have a lot of people scheduled in here and you want to find a time that's appropriate for everybody if you click Auto Pick Next it's going to jump you to the next timeslot where everybody is available. So it saves you kind of scrolling back and forth and hunting for a timeslot. So that can be quite useful.

And what I can do then is say Propose time and that's going to send that response back to the organizer. And they can then either accept that new time and send out the updated calendar invite or they can decline it. And again you'll see because I've tentatively accepted and proposed a new time the item is no longer grayed out but I still do have that tentative indicator showing in the left hand side of this meeting invite. Remember, when you've accepted and it's all booked in it will show as busy, which is a solid block of color.

So all in all very simple to respond to meeting invites.

That's it for this module. I will see you in the next one.

Video: Sharing Calendars and Delegating Access

Deb: Hello again and welcome back to our course on Outlook 2019. We're coming towards the end of section eight now where we've been taking a look at calendars in Outlook. Now in this module I want to touch on briefly again sharing calendars and also something called Delegate Access.

Now I showed you very briefly how simple it was to share your calendar with someone else, but just to remind you of the very simple process. If I want to share my calendar with somebody else in my team I just jump up to the Home ribbon and in the Share group I have a Share Calendar option. This essentially opens up an email invite for me and it has my calendar attached. And I can choose how much detail I want to share with the person I'm sharing my calendar with. So currently it's going to show them my availability only. I can choose to show them limited details or full details.

Now availability only you can see what that actually means. All they'll be able to see will be if I am free, busy, tentative, working elsewhere, or out of the office. They won't be able to see any of the subjects or exactly where I am. So that could be helpful if somebody needs to schedule meetings for you but they don't really need to see any of the details of your calendar, other then when you're free.

If we look at the other option, so Limited, it says Includes the availability and the subject of calendar items only. So there they're basically seeing all of the information that was available in the previous option, so whether you're free or busy, but also just the subject lines of those appointments and invites. Whereas if we were to say Full Details they will be able to see everything in that calendar item, as well as any notes that you have attached, people you've invited, all of that kind of stuff. So again entirely up to you how much access you want to give to your calendar.

Once you've selected that it's a fairly simple process of just addressing it to the person you want to share with and clicking on the Send button. Again it's just reminding me that I'm sharing the full details, which I'm happy with, and I'm going to say Yes. So again if somebody was to share their calendar with you you're going to see it appear underneath Shared Calendars. So for example, I have access to Marcus's calendar and if I have it ticked I can see it next to mine. Alternatively I can use that overlay feature to place it over the top of my calendar again. So a very simple process to share and also control the amount of information that you're sharing as well.

Now sharing calendars is very different to giving someone delegate access. Now what delegate access is is it means that you're giving someone permission to essentially to respond emails or maybe meeting invites on your behalf. So again the way that I've seen this utilized is in large organizations, and I'll give the example of somewhere I used to work in a law firm. So normally

there would be a partner of the law firm who would have a PA or a secretary and the secretary was given delegate access to the partner's email account, which means that she would receive all of the partner's emails and she could respond on behalf of the partner. So with this option you're giving quite a lot of control over to someone else. So I will say use it with caution. It is fairly prevalent in a lot of organizations though.

So I'm just going to show you very quickly how you set up delegate access or give delegate access to somebody else.

Now you'll find this underneath File and it's underneath, and I'm actually going to switch to my personal account for this, and you'll find the option underneath Account Settings and Delegate Access. And you'll see here it pops up a window and it says Delegates can send items on your behalf, including creating and responding to meeting requests. If you want to grant folder permissions without giving send on behalf of permissions close this dialog box, right click the folder and click Change sharing permissions. So that's showing you a bit of a distinction there. What they're saying is that if you have a folder in your Outlook email, for example, and you want to give someone else access to all of the emails in that folder you don't need to grant them delegate access for that. All you need to do, and if jump back to our email, so if I find one of my folders in here, so let's go to Travel and Trip. So if I want to give someone access to a specific mail folder I don't need to give them delegate access. All I need to do is right click, go to Properties, and jump across to the Permissions tab. And what I can do there is I can add someone's name in by selecting them from my contacts and I can then choose what level of access I want them to have. Okay? So giving access to specific folders is different to giving delegate access. So let's jump back to our delegate access.

Now if I do want give someone permission to send and respond to emails and meeting requests on my behalf all I need to do is click on Add, I select the person I want to add, so I'm just going to select them, click on Add, and then I get to go in and specify exactly what level of access I want to give them for each element in Outlook. So currently here it says This delegate has the following permission. So calendar. They have editor permission. So they can read, create and modify items. So really editor is the top level that you can give someone as a delegate. So this would mean that the person that I'm giving access to can read everything in my calendar, create new calendar items on my behalf and also modify items. And I need to go through tasks, inbox, contacts, and notes and set a level of access for each of them. So again if I want this person to be able to read my emails, respond to my emails on my behalf, so on and so forth I'd want to be giving them editor access.

There is also an option down here for Delegate can see my private items. So again if you've marked anything as private, and you can mark emails as private and you can mark calendar entries as private as well, if you want your delegate, so your secretary, your PA to be able to see those private items in your calendar also you can put a check in there and give them access to pretty much everything.

So that is how delegate access works. And again I've said I've seen it in use a lot of times at large organizations, specifically with managers and their PA's as it's the PA who really manages the manager's email and calendar, so on and so forth.

So hopefully that demystifies that process of giving delegate access and we've also had a recap on how you can share your calendar and also open calendars that have been shared with you.

That's it for this module. I will see you in the next one.

Video: Practice Exercise 07

Deb: Hello again and welcome back to our course on Outlook 2019. We're now down into Practice Exercise 07 where we're going to practice the skills that we've learnt in the Working with the Calendar section.

So I want you to jump into your calendar and the first thing I want you to do is just to change the color of your calendar. I'd like you to go in and I'd like you set the working week to Tuesday to Saturday. I'd like you to add the weather for your current location and then I'd like you to create a new appointment for this weekend and that appointment can be anything you it to be.

Finally I want you to practice creating a meeting invite and I'd like you to invite Harry and William Shakespeare.

And that is it for this exercise. See how you go with that and I will see you in the next section.

Section 9 – Tasks and Notes

Video: Creating a New Task

Deb: Hello everyone and welcome back to our course on Outlook 2019. We're now down into section nine where we're going to start discussing tasks, notes and shortcuts. Now in this first module I want to talk to you a little bit about tasks.

Now tasks are a great way for you to create an electronic To Do list essentially where you can add in tasks that you have to action, things that you have coming up, and you can track the progress on those tasks as well. So you can register if they're part complete or if you've in fact completed them. You can do things like set due dates on tasks and also assign notifications so you can keep on top of any upcoming tasks.

Now I really love to use the task feature in Outlook as quite often I have probably a list of about 20 different things I need to do and if I don't log them somewhere then I have a tendency to forget about them. So that's why I like to use tasks.

So in this first module we're going to do the very simple thing of just showing you how to add a new task.

Now the first thing we need to do is jump to the tasks area of Outlook and as with every other thing that we've looked at within Outlook you'll find it underneath your folders list and it's this middle icon just here, so the little box with the checkmark in it. That is how you jump to your task list.

Now what you'll see in here is my current To Do list. And you'll see over in the left hand pane I have To Do list highlighted. And if you look on the Home ribbon in the Current View group you can see that To Do list is selected in there.

Now the To Do list comprises of any new tasks that I've added. And what it will also show me are any items, so emails, calendar items, things like that that I've flagged for follow up. So it's a really important point to note and we are going to talk about that a little bit more in a moment. First of all I just want to deal with this To Do list.

Now this is fairly straightforward. I have all of my tasks listed in here and they're currently grouped together. So some of them have flags assigned to them but no due date. I then have tasks that are due today, tasks that are due tomorrow, ones that are due this week and then right at the bottom I have tasks that are due next week. So all we're going to do in here is I'm going to show you how to add a new task to your task list.

Now there are a couple of different ways that you can do this. The most obvious is on the Home ribbon. The first option you have there is New Task, shortcut key Control-N. And this is going to open up the New Task window.

So fairly straightforward in here. We're going to enter in a subject for our task. So I'm going to say Complete marketing survey. Now I'm going to give that a start date of today but I need to get it back to marketing by tomorrow. So my due date is going to be tomorrow. Now I haven't actually started this task yet so I'm going to leave it as not started and you do have various other statuses that you can select from this dropdown. The priority is normal. It's not high priority, it's not low so I'm going to stick with normal. And currently because I've not started this task it's 0% complete. Now I could set a reminder as well if I wanted to to remind me to do this task, but in this case I'm not going to bother with that. I'm just going to keep those details and I'm going to say Save and Close. And what you'll see now is that if I have a look at my To Do list for tomorrow I have Complete Marketing Survey and that's now listed in my task list. So super straightforward to add that in.

Another way that I can add tasks is just by clicking in this box just above the task list, so where it says Type a new task I can click in here and I might want to say Order stationary. And if I hit Enter that's just going to automatically put that in the Today group. Now if I actually don't want to do this until next week I would need to go into it and then edit those dates. So I'm going to say that this is due next Wednesday. And as I've already started to take an inventory of the stationary that we have left I'm going to say that it's in progress and I've done about 20% on that particular task. And I'm going to say Save and Close. And now you'll see at the bottom of my To Do list I have Order Stationary. So super simple to add tasks in.

Now I'm just going to jump back to my inbox for a moment because another little utility that I like to use is the To Do pane. I like to be able to see my tasks running down the side of my inbox. Now we've looked at this before but I'll just remind you. If you jump up to the View ribbon and in the Layout group we have this To Do Bar option. And one of the selections we can make is tasks. And that's just going to display my To Do list running down the side. So it's really handy just to be able to glance over from your emails and see any tasks that you have coming up.

Now as I mentioned before this To Do list not only contains your tasks but it will also show any items you flagged for follow up. So for example, I'm in my email. Now maybe this one that I've got highlighted from my real estate agent maybe I need to follow up with this email. So again what I could do is set a follow up flag. And you'll see as I hover over that flag column it says Flag as a To Do item, which means it's going to add it into my To Do list. So I'm going to flag this item and you can see that's added that in for today.

Now what I could actually do is if I wanted to change that, if I jump up to my Task Tools I could change that to Follow up next week and then that's going to move it right down to the bottom in my To Do list and I now follow it up next week.

So don't forget that this To Do list is amalgamation of any tasks that you add but also any items that you flag for follow up.

So that's it. Pretty straightforward to add tasks and To Do items. I will see you in the next module.

Video: Assigning and Completing Tasks

Deb: Hello everyone and welcome back to our course on Outlook 2019. We're still talking about tasks in this module and if you remember in the previous module we just looked at the way you can add tasks and also flagged emails into your To Do list. Now there's just a few other features that I want to highlight in this task area and I also want to show you how you can assign tasks to other people.

Now when you're in Tasks and you're clicked on the Home ribbon you'll see everything on this Home ribbon is related to tasks. Now a lot of these items will be fairly familiar to you as they are pretty standard across all the other parts of Outlook. So things like Delete, Reply, so on and so forth. But we do have some groups over here which are specifically unique to tasks.

So first of all we have this Current View area, and as I said, I'm viewing my To Do list but I could change that, and again this is entirely up to you how you like to view your task list. So I could look at a detailed view, I can have a simple list, I can show the tasks that are prioritized, I can show active tasks, completed tasks, tasks that are due today, so that's quite a good one if you just want to see what you have coming up today. I can view tasks that are coming up in the next seven tasks. I can view overdue tasks, any that have been assigned, and also server tasks. So how you're viewing your tasks is entirely up to you.

You also have this Follow Up group. So again if I was to click on a particular task, like Summer Party, this one's set to be followed up tomorrow. And you can see in this Follow Up group it's got Tomorrow highlighted. So if you need to change the flag status of any of these items you can just select it and pick one of these options from this Follow Up group.

Then of course you have Remove from list. So if you no longer need a task to be there, so if I select this one and Remove from list that's going to delete it. And I also have a Mark Complete button which I'm going to talk to you about in a moment.

So let me first of all jump into this one here, Update Project Plan. Now I might decide that I'm not the best person to complete this task. So maybe Marcus has been working a lot more on this particular project so I think that this task would be better assigned to him. And you have an option to do that within Tasks. You have the Assign Tasks option just here. So I can click Assign Task and it basically asks me who I want to assign this task to. So again I can go in and I can pick somebody from my contacts, I'm going to say Marcus, click on OK, it's going to show him all the details of this task, including its current completion status which is 50% and all I need to do is say Send. And that task is now going to be emailed Marcus and added to his To Do list. So again super simple to take a task and assign it to somebody else. That works particularly well if you're a manager and you have lots of people that work for you. You might be the one who has the overall knowledge of all of the upcoming items but you might need to assign different jobs out to different people.

So of course you do have options that we've been through previously. Things like Categorize, you can mark tasks as private, and you can also set importance levels on tasks as well. So lots of different options but a lot of them should be reasonably familiar to you by now, now that we've been working in Outlook for quite a while.

The final little thing that's worth noting with regards to tasks is that once the task has been completed you can mark it as complete. So I'm going to take this task here, Complete Marketing Survey and what I can do is if I've actually done this and slightly early because it's not due till tomorrow I could jump up to this Manage Task group and click Mark Complete. Alternatively if I open up that task I also have a Mark Complete button. And you'll see there it's now disappeared from my To Do list. And if I wanted to see all of my completed tasks I can use this dropdown and I can change my current view to Completed and that's going to show me all of my completed tasks with a strikethrough. And you can see the top one there is Complete Marketing Survey.

So that is pretty much all there is tasks. It's a very simple process of adding things in to your To Do list, knowing how to open them, edit them, update the status, and also how to assign them to other people and mark them complete once finished.

That's it for this module. Please join me in the next.

Video: Creating Notes

Deb: Hello everyone and welcome back to our course on Outlook 2019. In this module we're going to very briefly dive into Notes, and this is a really simple feature to use but again really, really useful.

Now you'll find your notes in the same place as all of the other applications. If you look at our icons running across the bottom underneath our folder list you'll see the one next to Tasks is this little bit of paper with a corner folded up. That is how you can access your notes.

Now remember if you do have problems deciphering what these icons are, if you click the three dots, go to Navigation Options, and uncheck Compact Navigation and click on OK you'll see that you now get the actual words. So some people find that a lot easier than trying to decipher those icons. So let's click on Notes.

Now again this is pretty much exactly what it says on the tin. This allows you to keep a list of notes. Now I'm very prolific for doing this. I am a big fan of having notes on my phone so I utilize my Notes app all the time when I'm doing things, but you also have the facility within Outlook.

So this isn't going to take too much explaining because it is very, very straightforward but we'll just go in and we'll create a new note.

So first icon on the Home ribbon, New Item, shortcut key Control-N. and you can see here I get this kind of little sticky note. This always reminds me of a small little Post-It note and you can increase the size of this just by dragging it out. And let's say I want a note here, maybe I can never remember the security code for the front door. And all I need to do to save that is just click away and you can now see I have that little note just there.

Now again if you don't want pertinent information showing up like here, you can see it says Security Code, and then we have the security code. If I double click to edit this note you might want to give your note a title and then put the more pertinent information a bit further down so that when you click away all you can see there is Security Code or Door Code, something along those lines.

I'm going to add another new note. And this time I'm going to call this Twitter Handles. I'm just going to make a note of my team's Twitter handles. And again I can just click away and it adds that note in.

Now you can see here I'm currently displaying these as these little icons. So these look like small little Post-It notes. And you might want to display them in a slightly different way and you can control that using the current view. So you have three options in here. So if you prefer you could

switch to Notes List which displays them like that. Now I actually prefer them like that, but again it's entirely personal preference.

As with everything in these views you can set up your view to display whatever information you want, as we've seen in other modules. It's exactly the same from within Notes.

You have a Search bar at the top here so you can search your notes. So if I type in Marcus it's going to pull back that Twitter handles note because I have the word Marcus within that note. So again a very simple search using that contextual search bar.

I have all of the usual options you would expect in here. So I can do things like forward notes, I can move notes to different folders or even different email accounts if I have multiple attached. I can do things like create new folders. So again if I say New Folder, I might want to have a folder called Social Media, make sure I have Notes selected, click on OK. I now have a Social Media folder. So I might want to move this Twitter Handle note to that particular folder. So I could just drag and drop and there you go. I have Twitter Handles in there. And again I could change that to Notes List.

Now one thing to note there is that when I dragged and dropped it's actually done a copy to that folder as opposed to a move. So the note is still there in the original list.

I can also do things like categorize my notes. So I might want to set up a quick new category in here. So I'm going to say New, I'm going to call it Social, I'm going to give it, let's do a dark green color, and OK. I'm going to say OK. And that has now changed that note color to show me that it's in the category Social. And once again you can do things like search notes utilizing categories. So again if I select Social it's going to pull back that Twitter Handles note.

So that is pretty much it with regards to Notes. A lot of these features we've utilized previously so you should be reasonably familiar with them. The process if very straightforward to add notes in.

And that's it for this module. I will see you in the next one.

Video: Working with OneNote in Outlook

Deb: Hello again and welcome back to our course on Outlook 2019. We're still down in section nine and we've just been talking about Notes in Outlook. And I didn't want to leave this section without at least mentioning the other Notes option that you have in here where you can utilize OneNote.

Now if you've never utilized OneNote before and you're not sure exactly what it is it's a very comprehensive note taking application and it is a Microsoft application. So if you do have that on your PC, which I do, I'm just going to very briefly show you an example.

So this is the application OneNote, and as I said it's a note taking application on steroids. You can basically create electronic notebooks that have pages and you can see I've done one here to track of all my travels and my trips. So I have a page here for France, I have a page for Italy, Germany, Spain, so on and so forth and I've added various different notes. So a little bit of an itinerary or what I'm going to do when I first get there. I've added things like maps, pictures. Again I've got interactive To Do lists that I can check off. I've got some audio attached and I also have a Word document attached in there as well. Now I'm not going to go into all the details of how to use OneNote because it is an application in its own right and we're really just focusing on Outlook in this course, but the reason why I mention it is if we minimize this down and jump back to Outlook you'll see that when you're in your email on the Home ribbon you do have a OneNote option in here. And as I hover over it says Send selected message to OneNote. So this can be really useful. If you have an email come in and you want to add the information contained within that email into your OneNote notebook you can do that using this button.

So if I find one just here from Trip Advisor that's related to travel I'm going to click on my OneNote icon and you can see that because I've got OneNote open it's now added that email into the bottom of the page I was clicked on. And I can now move it around, I can format it, I can do all kinds of things with it. So it's a really great way of adding information from emails directly into your note taking application.

And again this will only really apply to people who have OneNote on their PC.

Now I'm going to close down OneNote because it does work slightly differently if you don't already have the application open. Again I'm just going to use the same email. I'm going to click on OneNote and because it's not open it's asking me to select a location for this email to be pasted into. So if you remember I had my travel notebook and let's expand June 2019 and I added that email into the page for France. So I'm going to select Italy this time, I'm going to say OK and it's going to send that email to the Italy page and paste exactly the same thing in.

So a really nice little option that I didn't want to leave this section without showing you it. So if you do have OneNote please remember you do have that option as well. That's it for this module. I will see you in the next one.

Video: Practice Exercise 08

Deb: Hello everyone and welcome back to our course on Outlook 2019. We've now made it all the way down to Practice Exercise 08. The end is in sight. Now in this exercise we're just going to practice some of the skills that we've learnt in the Tasks and Notes section.

So the first thing I'd like you to do is to add a new task to your To Do list called Research Venues. I'd like you to set a due date for next week and mark it as 50% complete. I want you then just to check to make sure that that appears in your To Do list.

I'd then like you to add a new note that lists the favorite drink of three of your coworkers. I'd then like you to create a brand new category called Food and Drink and assign the category to the note.

And finally, and this is optional, if you have OneNote on your PC I'd like you to send an email of your choice to one of the pages in your OneNote notebook.

That should keep you busy for the next few minutes. See how you get on with that and I will see you in the next section.

Section 10 – The Backstage Options

Video: Opening and Exporting Data

Deb: Hello everyone and welcome back to our course on Outlook 2019. We've made it all the way down to section ten. We are in the home straight, the final section. And in this section I just want to bring things to a nice conclusion by just exploring some of the other options that we have in that backstage area.

Now if you recall the backstage area can be accessed by clicking on the File tab at the top and we have been in here a couple of times already to do things like automatic replies, we've also added additional email accounts from here as well, and we've also had a little look into Account Settings.

Now I'm going to go through the rest of these options that we have running down the left hand side. And the first one here is the Open and Export option. So this allows you to either open items in your Outlook or export your information out of Outlook. So again it really depends what exactly it is that you're trying to do.

So the first option here is Open Calendar. So if you've been sent a calendar and calendar formats in general will be a .ics file extension. You can choose to open that calendar within your Outlook. Now it might be that somebody has sent you their calendar in that particular format as a file. You've saved it off locally and you now want to open that calendar. So if it's a .ics calendar format you can definitely do that using this option. Now I don't have any listed in here but it's a very simple process of just scrolling or navigating to the folder where you have the file saved, clicking it and saying Open and that will open in your calendar area. So don't forget you do have the option if you do get sent a calendar in .ics or .vcs format.

Now another thing you can do in here is open an Outlook data file, and Outlook data files are .pst files. Now just to explain to you exactly what that is, your Outlook data file contains all of your Outlook data for your particular account. So if I click the Back button just here you can see I have an Outlook data file up here, my personal account is another data file, this account is another data file. So they're all .pst account essentially.

And also if you remember back when we were talking about archiving, when you start archiving things and you get your Archive folder that is also a separate .pst file. And that is why when you archive emails from your email inbox they move from your current .pst file to the Archive .pst file. And that is what helps you keep your mailbox size down. So your archive is a separate .pst file as well. So just think of it as a file that holds all of your data.

So if we go back to the backstage area and open an export you can open other Outlook data files within your Outlook as well. So if I click Open Outlook data file it's going to show me my

archive sitting there. So if I wanted to open that archive and see all of the emails that I've stored in it then I can definitely do that. And you may have other .pst files that you might want to open.

Let's jump back, open an export and then we have an Import/Export option. And this allows you to import or export files and settings. Now this will pop up the Import and Export Wizard and which option you choose really depends on what exactly it is that you're trying to do. So we have a couple of options for exporting and quite a few for importing. And you get a little description at the bottom which explains to you a little bit more detail as to what each of these options will do. So for example, if I was to say export to a file that tells me that this option will allow me to export Outlook information to a file for use in other programs.

Now if I remember back in the day, and I'm talking a long time ago now when I was working at another organization this used to go on all the time. So people would quite often export all of their email data or their .pst file and they might save it off to a memory stick or something along those lines. As I said, it was a very long time ago. I'm sure there's much more efficient ways to do that now. But for example, if I was to say export to a file and click on Next it's going to say what kind of file do you want to create. So I might want to create an Outlook data file, click on Next and then it's going to ask me Select the folder to export from. So because I've got a few accounts attached it's saying, "Okay. What information do you want me to export out of this .pst file?" Now I'm actually not going to do it but what I would do is I would select the account, I would include my subfolders, I would click on Next, and then it's going to ask me for a location to save this .pst file and I have the opportunity here to also give that .pst file a name. Now as I said, I'm not going to click Finish because I don't want to export my data but it's a reasonably straightforward process and the wizard guides you through that very nicely.

And then finally we have an Open a Folder Shared by another user. So again if you've been given access to somebody else's email account and you want their emails to displayed in your folder list like you have yours displayed then you can just select the name of the person, add it into here, and as long as you have access when you click on OK it's going to show you their email account with all of their folders. And again that really does depend on what level access you've given. The example I'll say again is when I used to work in a law firm the partners with their PA. So the partners would always give full access to their inbox and all of the subfolders to their PA's. The PA's would jump into here, they'd say Open other user's folder, they'd type in the name, click on OK, and it will pull up all of their folder structure. So remember that you also have that option in there.

So a few little options with regards to open and export. In the next couple of modules we're just going to carry on going through those backstage options so you understand everything that's in there. But for now that's all. I will see you in the next module.

Video: Printing

Deb: Hello everyone and welcome back to our course on Outlook 2019. This is Deb and we are racing towards the end of this course. We have a couple of final modules just to tidy things up and round things out and if you remember from the previous module we were looking at some of the options that are available to you in that backstage area. And we were focusing on Open and Export in the previous module and the next thing I want to point out to you is this Print option. Now again this is just going to allow you to select an email and then print it out.

And this is again very straightforward. You can see I have a preview in the main page of the email and it all looks very nice. And then in the left hand section we have the big Print button and that's how we print but we want to make sure we have our printer options and settings set correctly first.

Now first of all you want to make sure that you have a printer attached and you can see mine's offline at the moment but you want to make sure that your printer is online. And then you may want to take some time to take a look at the Print options that you have. Now again when you jump into here you get to choose the print style. And again that is exactly the same as we what we have here in Settings, so we're going to look at that in a moment. You can specify a print range. Now I'm only printing a one page email so I'm fine to stick with All but if you do have emails that run across multiple pages you may want to print them all or you may want to print specific pages. So if I had a ten page email and I really hope that I never receive a ten page email but if I specifically only wanted to print pages two and four I would type in two, comma, four in order to print those. If I want to print a range of pages, so if I want to print page two to four, which is going to include page three in the middle there, it would be two, dash, four. Okay? So that's the kind of format that you need to use when selecting pages to print.

You do also have an option to print attached files. So that's quite a nice little option. If you have an email and you want to print out the email but that email also contains some documents attached, so it might have some Word documents or maybe some Excel documents and you want to print those as well at the same time you can select Print Attached Files here as well. And you can see that the attachments will print to the default printer only.

And then finally up here you get to specify a number of copies, so how many copies of that, and if you want to collate the copies as well. So always worth jumping in there and checking your printer options.

And then finally we have these Settings. So currently I'm set to Memo Style. The other option I have is Table Style, which looks like that. So that is a great way of printing the actual email list as opposed to a specific email. So that's showing me everything I have in the particular folder that I'm clicked on, which is my inbox. So if you do want to print all of the items in your inbox

select Table Style. If you just want the individual email that you're clicked on select Memo Style.

And that is pretty much it. Once you've changed those settings make sure your printer is set up correctly and you just click the big Print button to send all of that off to the printer.

Nice and straightforward on printing. I will see you in the next module.

Video: Customizing Outlook Options

Deb: Hello again and welcome back to our course on Outlook 2019. In this section we're taking a look at those final backstage options. So let's jump back into the backstage area and the final two that I want to highlight to you in here are Office Account and Options.

Now if we jump into Office Account, we've actually been in here previously, and this is where you will see all of your user information. So you can see my name there, my email address, and this is where I can come to kind of customize the theme that I'm using in the background. So you can see currently Office background Circles and Stripes. And if you look right up in the top righthand corner you will see that kind of Circles and Stripes theme that's been applied. Now I do have lots of different ones that I can change in there. So I could change to Clouds, Doodle Circles, Diamonds, and let's go with Stars for this one. And again that Office theme that we've looked at a couple of times, Colorful, Dark Gray, Black and White. And again totally personal preference.

Now you can also do things like attach different services from within here. So you can see that I have my OneDrive attached to my Outlook. Now I always recommend doing this because it makes it a lot easier for you when you're trying to do things like attach files to emails from OneDrive and work on OneDrive files or maybe even save attachments into OneDrive. So I would recommend that if you do have OneDrive Cloud storage, whether it be OneDrive Personal or OneDrive for Business that you do connect that up to your Outlook through here. And again this is a very simple Wizard process to get that all connected up.

And then finally on the righthand side we just have some information. So you can see here that I am using Microsoft Office Professional Plus 2019. It tells me all of the applications that are included in that. And I also have some options updates. So remember what I said. This is the big difference between the standalone version, so 2019 in this case, and Office 365. If you're using Outlook in Office 365 you will automatically receive updates, whereas 2019, which I purchased as a standalone version, so not a subscription version, I need to go in and do things like check for updates and things like that. So a little bit more tricky to work with there.

And then finally we have our About Outlook, Microsoft Software License Terms in there if you ever care to read it. So just some basic information about your account that can sometimes be quite useful.

Now finally I just want to jump into Options. Now again when it comes to Options or Outlook Options in this case there's always so many little different settings that you can change. And in general I never go through them all. We have dipped in and out of this as we've been through the course. So where there's been a relevant setting that I felt it's important for you to know we have jumped into this and we've changed it. So quite a lot of these most useful options I've already shown you, but let's go through a couple more.

So I want to jump to People. So this is all related to working with your contacts. Now we didn't come into here at all when we were looking at contacts so this might be one that you want to review. So you can do things like change the default full name order. So again how you want your contact's name to be displayed. And there's a couple of other options in there that you might want to change as well.

Now if we jump into Tasks, again you can do things like change the default reminder time. So if you set a reminder on a task by default that reminder is going to be set to 9 a.m. You might want it at a different time and you can change that in here. And you can also change the color of tasks. So any overdue tasks, so tasks that have gone past their due date will show in red in your task list. You can however come in here and you can customize that color to suit. And you can also do the same thing for any completed tasks. This is where you'll also find options related to Search. So those are definitely worth checking out. And again it's just really setting defaults.

You have some Language options in here. So you always want to add in what your preferred language is. So that's good for things like when you're doing things like spellchecking.

Ease of Access. So this is your accessibility options, which again these are definitely worth checking if you have any accessibility issues they're definitely worth looking at some of those options.

And then we also have our Advanced area. And again we've been into a few of these different options. For example, the Reading Pane. This is where you can customize what happens to emails when they're viewed in the Reading Pane. So whether you want them marked as unread, etcetera.

And also Navigation. This basically shows you the order that your applications are listed in. So you'll see that this display order corresponds to what I have running across the bottom of the screen, Mail, Calendar, People, Tasks, Notes, so on and so forth. And I could go in and reorder these if I wanted to.

We talked about Auto Archive Settings previously. And you also have a number of other options that you might just want to have a read through.

Now in general I don't tend to change any of these ones towards the bottom, but as I said it's always worth having a little look because you never know.

And really the only other ribbon in here which I would say is of major importance is that Quick Access Toolbar ribbon. Again we went into this right at the beginning of the course when we were looking at how we can add commands and customize our Quick Access Toolbar.

So definitely worth jumping in to your Outlook Options, having a little look through. As I said, we have customized many of them as we've been going through this course. So hopefully what we've done so far should be enough to get you working well in Outlook.

That is it for this module, that is it for this section, and that is pretty much it for the main bulk of content for this course. So please join me in the next module.

Section 11 - Conclusion

Video: Course Close

Deb: Hello everyone. This is Deb and I just want to say a massive congratulations. If you're looking at this module then you have made it all the way through this course on Outlook 2019 and you will have taken in so much information and knowledge over the last 50 or so modules.

I really hope you enjoyed this course as much as I enjoyed putting it together and presenting it to you. And behalf of everyone here on the team I'd like to say a big thank you for choosing us. Happy learning and we hope to see you in the future. Bye everyone.