



Microsoft Outlook 2007-2019/365

Level 1: Getting Started

1 Day Course

Training at Your Office

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COURSE DESCRIPTION

If you're struggling with your inbox, this course is for you. We'll start with Outlook's email utilities, covering the things you probably don't know, as well as providing tips and tricks about the things you may already know. Next, you'll learn how to use the Calendar, Tasks, and Notes utilities to keep your day-to-day activities organized. We will then look at the Contact utility to keep track of everything you know about the people you work with, both inside the company and out.

Course Prerequisite: participants should already be familiar with basic Windows use.

COURSE TOPICS

Overview

Reading Pane, New Button, Title Bar
Outlook Today/Personal Folders
Address Book
The Navigation Pane, Shortcuts
The Folder List
Personal, Public, Favorites Folders
Creating a New Folder
Moving/Rename/Delete a Folder
Preview Other Folders

Email

Inbox
Sorting Mail
Groups
New Mail
Preview Messages
Deleted Items, Drafts
Adding/Removing Columns
Out Of Office Assistant
Email – Sending, Receiving & Options
Adding & Receiving Attachments
Forwarding/Replying to Others
Reply/Forward from Reading Pane
Archiving
Email Formats , Formatting Messages
Adding Images & Signatures

Introduction to the Calendar

Overview
Weather Forecast
Entering an Appointment
Dealing with Reminders
Recurring Events
Rescheduling/Deleting an Entry
Printing Calendars

Introduction to People (Contacts)

Entering and Editing Contacts
Create a Contact from an Email
Message
Create Another Contact for the Same
Company
Viewing Contacts
Assign Contact Actions (Email,
Appointment, etc)
Flagging for Follow Up
Choosing Contacts when Sending a
Message

Tasks

Creating and Entering a New Task
Marking Tasks as Completed
Assign a Task & Recurring Tasks
The To-Do Bar

Notes

Creating New Notes
Note Options

Find

Locating items in Mail, Calendar,
Contacts, etc.
Instant Search



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Level 2: Mastering Outlook

1 Day Course

Training at Your Office

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COURSE DESCRIPTION

Take your productivity to the next level with Outlook's sharing features. You will learn how to quick schedule meetings, share calendars, assign tasks and track each employee's progress with an automatic log.

You will also learn advanced techniques for wrangling large volumes of email into a neat, organized structure.

Course Prerequisite: Outlook Introduction or equivalent knowledge.

COURSE TOPICS

Folders

- Default StartUp Folder
- Create Search Folders

Email

- Advanced Options
- Voting Buttons
- Receipts
- Tracking Options
- Dealing with Junk Email
- Safe Senders List
- Creating Hyperlinks
- Using Stationery
- Creating Stationery
- Creating a Theme
- Organizing Mail
- Categorize by Colour
- Outlook Email Postmarking
- Using Conditional Formatting
- Using Quick Parts
- Using Clean Up

Advanced Calendar Options

- Inviting Others, Responding to an Invitation
- Can those Invited Attend?
- Creating Calendars
- Comparing Calendars
- Sharing Calendars

Advanced Calendar Options (cont'd)

- Calendar Defaults and Time Zones
- Adding Holidays
- Organizing Calendars
- Sending Calendar via e-Mail
- Internet Calendars
- Integration of Calendar Appointments and Tasks on the To-Do List
- Send Task Status Alerts

Advanced People (Contacts)

- Creating & Managing Distribution Lists & Contact Groups
- Electronic Business Cards
- People Cards
- Assigning Actions to Contacts
- Finding a Contact
- Organizing Contacts
- Importing Contacts from Access/Excel
- Mail Merge Contacts with MSWord
- Envelopes & Labels
- Backing up Contact Data
- Exporting as CSV File

The Journal

- What is the Journal
- Starting the Journal
- Adding New Journal Entries

Setting Rules & Alerts

- Creating Rules for Emails when Receiving
- Have Emails Moved/Copied into Folders or Deleted Automatically
- Creating Alerts when an Email is Received from Someone Specific

Customizing Outlook

- Customize Ribbon
- Outlook Templates
- Working with Outlook Forms
- Creating Custom Forms



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