



**First Call**  
Stress free IT

## Outlook for Microsoft 365 Course Profile

### Understanding the fundamentals of email

½ day

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

#### Objectives

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

#### Course Outline

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

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

#### Equipment required

Delegates – 1 PC each with Outlook for Microsoft 365 loaded and configured to use a training account, connected to a printer; pen and paper

Trainer – as above plus a projector/screen to connect to the PC; whiteboard or flip chart

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### Using the Calendar

½ day

#### Objectives

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

#### Prerequisites

Delegates must have previously attended the “Understanding the fundamentals of email” Outlook 2016 course or gained similar knowledge in the workplace.

#### Course Outline

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

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

#### Equipment required

Delegates – 1 PC each with Outlook for Microsoft 365 loaded and configured to use a training account, connected to a printer; pen and paper

Trainer – as above plus a projector/screen to connect to the PC; whiteboard or flip chart

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### Using Tasks and Contacts

2 hours

#### Objectives

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

#### Prerequisites

Delegates must have previously attended the "Understanding the Fundamentals of Email" Outlook 2016 course or gained similar knowledge in the workplace.

#### Course Outline

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

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

#### Equipment required

Delegates – 1 PC each with Outlook for Microsoft 365 loaded and configured to use a training account, connected to a printer; pen and paper

Trainer – as above plus a projector/screen to connect to the PC; whiteboard or flip chart

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### Organise your Outlook items

½ day

#### Objectives

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

#### Prerequisites

Delegates must have previously attended all the above courses or gained similar knowledge in the workplace.

#### Course Outline

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

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

#### Equipment required

Delegates – 1 PC each with Outlook for Microsoft 365 loaded and configured to use a training account, connected to a printer; pen and paper

Trainer – as above plus a projector/screen to connect to the PC; whiteboard or flip chart

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