Organizing Your Email, Contacts and Calendar in Outlook

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Course Objective: To gain an understanding of basic functions within a standard email client. This includes, but is not limited to: calendar functions, managing contacts, adding multiple email accounts, task and notes, and organizing your inbox.

What exactly is an Email Client?

An Email Client is a program that allows a user to add accounts and access their email messages. Currently the most popular email clients are web-based, this includes services such as: Gmail, Yahoo mail, Hotmail, and AOL. There are also stand-alone programs such as the default "Mail" that comes preinstalled with Windows 10, and then there is also Outlook which is included in the Microsoft Office Suite.

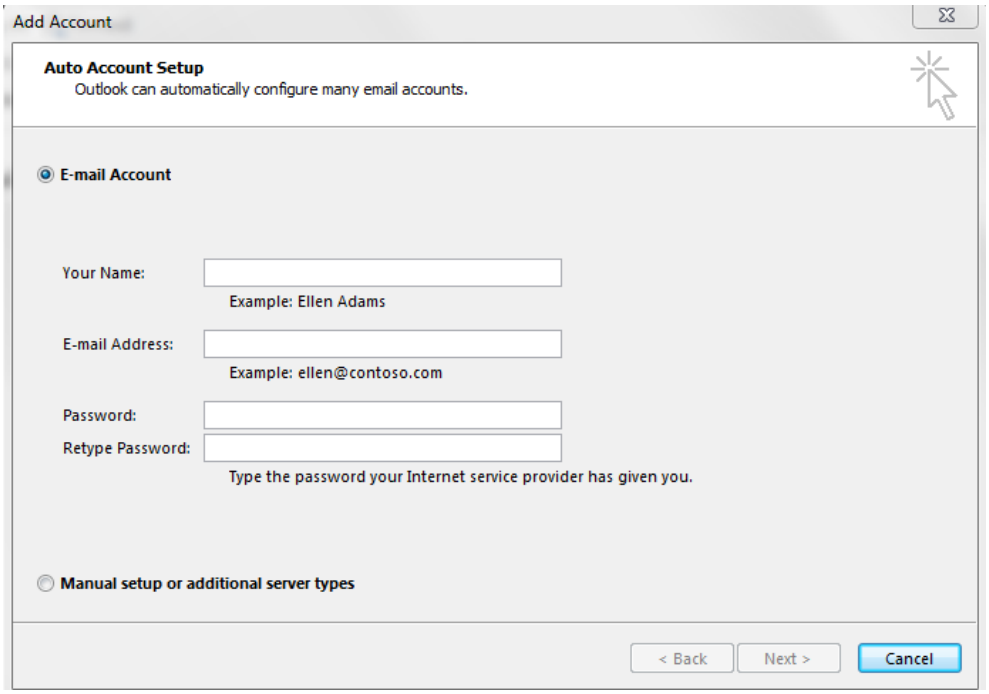
This course will work specifically with Outlook, but if you use another program you can be assured that all of these clients function similarly.

Adding an Email Address to Outlook

If it is the first time that you are using Outlook, upon start up you will be asked to add an email address. If you already have used Outlook before, the steps to add a new email address are the same as if you were to add it at the beginning, and can be seen below.

File >> Add Account (Green Box) >> Fill in the Wizard

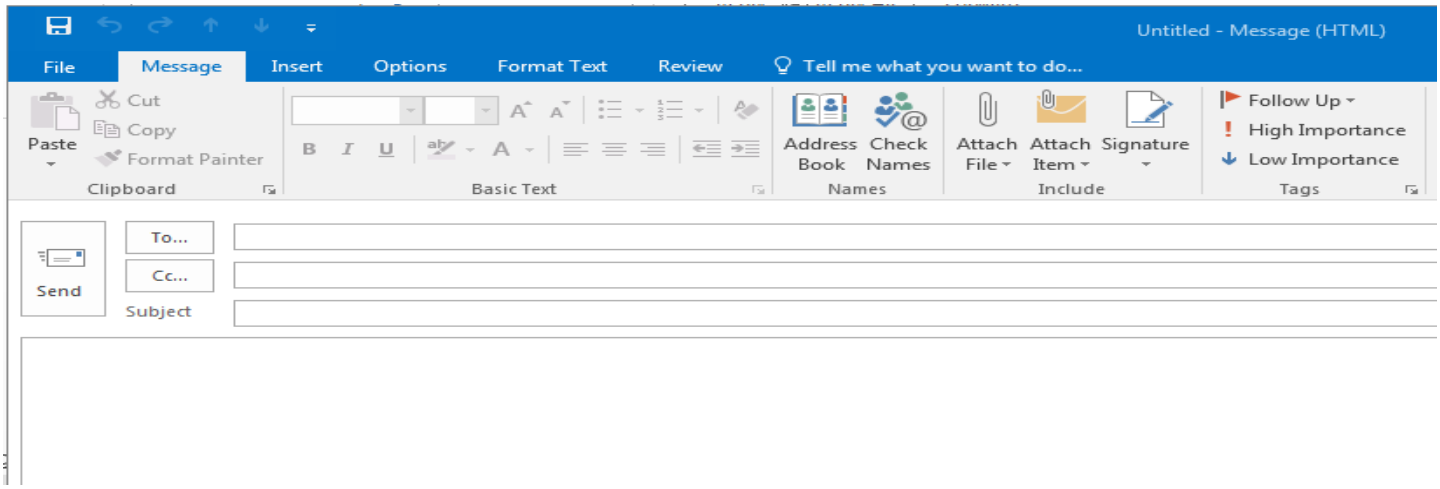
Note: Where it says, "Type the password your internet provider has given you," just means the current password for your email address.



You can add as many email addresses as you'd like to Outlook, and you will be able to manage all of them with the ability to switch between email addresses on the fly.

Sending Mail

If we want to send an outgoing email to someone, we first have to compose the email. To do this we will navigate to the top right corner and choose the “New Email” button. We could also use the keyboard shortcut Ctrl + N. After doing this, you should see a screen that is similar to the one shown below.



In the portion that says “To…” we can enter in the email address of whomever we would like to send something to. Clicking on that button will open up out contact book, we will go over this in more detail later. For now, just worry about being able to enter in an email address manually.

The next portion of this is the “Cc…,” here we can do what’s called a Carbon Copy and send a copy of our email to other recipients not on the chain of emails to begin with. In addition to Carbon Copy’s we can also do a Blind Carbon Copy, in which the recipient of the BCC can see the whole of the email chain, but it will not be known to the rest of the recipients.

Finally, we have the subject line. This lets us put in an identifier for the topic of the email, and it is always a good idea to put one in. If you don’t put in a subject line Outlook will ask you if you are sure you want to send it, and you have to confirm “yes” if you do.

Once you have, at the very least, a recipient of your email, you are ready to write the body your message. This can be seen in the bottom portion of the new mail window as a large blank whitespace. You can format the text just as you would a Word document, but one of the most powerful tools you can use with email is attaching files.

To attach a file, you click on the Paperclip that has “Attach File” below it. This will open a file explorer that you can browse to find whatever file you would like to attach. Most email clients have a default size of 20 – 25 megabytes per attachment. You can change this in Outlook, but it depends on the size of your company’s mail server, and if you are using this for personal messages, it is a good idea to leave it at a size of 25 megabytes max.

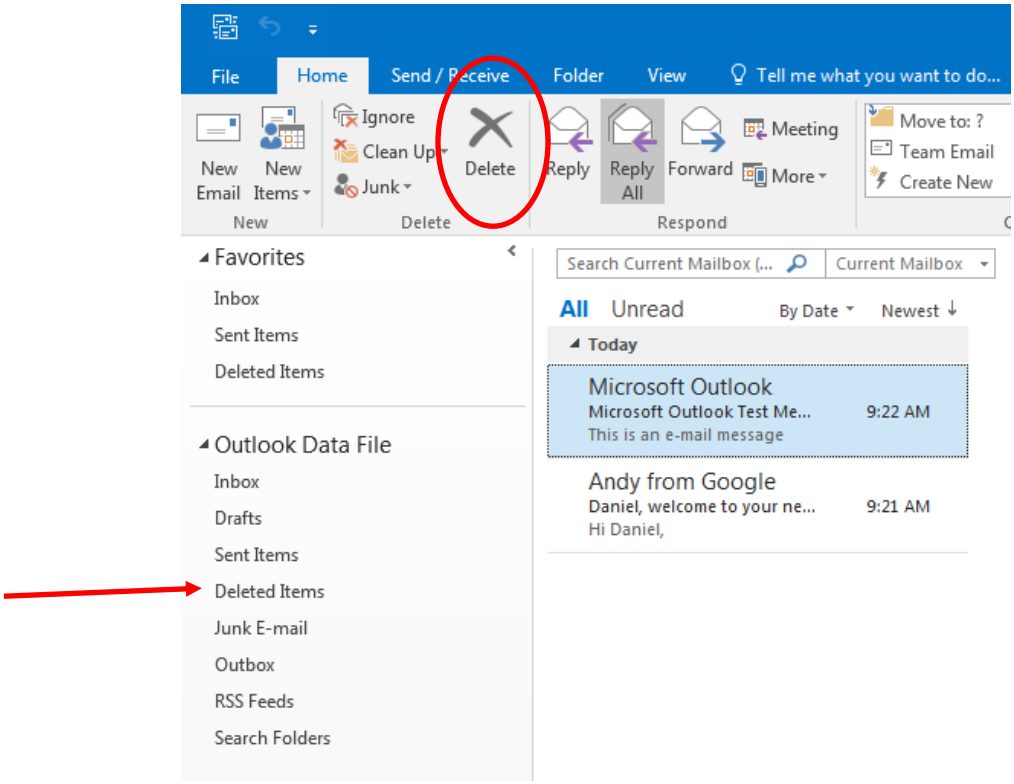
If you ever reach the limit, you can always use the ZIP function in the file explorer to compress your files to a more manageable size.

Managing your Inbox

Now that you know how to send an email, you will more than likely be receiving mail as well. To keep yourself from being overwhelmed it is a good idea to know how to manage your inbox and create subfolders to keep your emails organized, and archive important emails to keep handy.

The first step to organizing your inbox, is to delete mail that you no longer need. It is a good idea to do this as often as you can. I'm sure we've all been in the situation where we have 5000+ emails in our inbox, and no idea where the most important one we need is. To mitigate this situation, we have the ability to delete emails. To do this we can either hit the grey 'X' in the ribbon, or we can right click on the email and at the bottom of the menu we can select delete.

Any email that we delete will first get moved to the "Deleted" folder, from that folder we have the option to delete permanently. If you ever want anything back from the Deleted Folder, you can simply drag and drop said message back into your inbox.



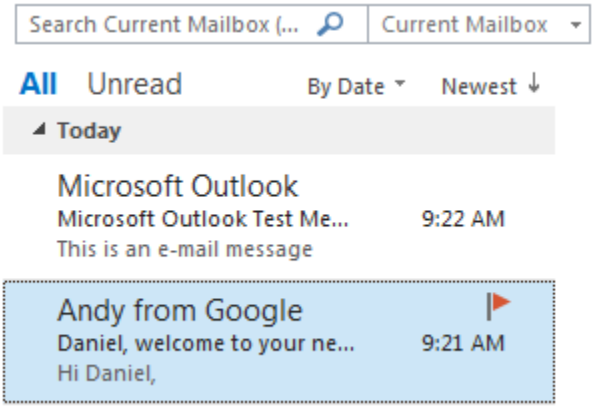
Now we also have a folder called Junk Mail (sometimes called "Spam") this is the folder that we can use to segregate unsolicited or nefarious emails, as well as block users we no longer want to receive emails from. Any user that has an email they sent you in the Junk Mail folder, will have all their email sent to that folder instead of your inbox. It is a good practice to NEVER click on a link in a piece of Junk Mail.

You also have a "Drafts" folder, this is where you will find any emails that you started working on, but haven't finished. Once you do finish and send them, they will be moved to your "Sent Items" Folder.

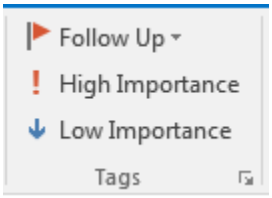
We can also create custom folders, do this by right clicking in the area your inbox is located, and choose "New Folder." This will allow you to create whatever you need to organize your inbox.

Managing Your Inbox (2)

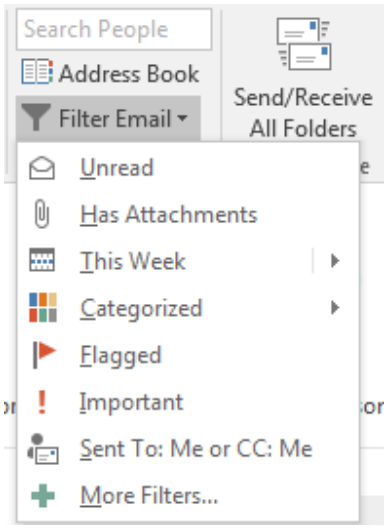
Including making folders, and using the default ones to keep our inbox organized, we also have a suite of tools to keep mail that is important visible and easy to find. One of the first things that is good to know is called Flagging. Flagging is setting up a reminder that we need to respond to this email. If we click the small flag at the right of a message it will turn red. It will stay red until we unflag it. You can see what this would look like in the image below.



If you ever receive a message that has a red '!' next to it, this means that it is a priority message from whoever sent it to you. You can do this when sending a message by choosing the High Importance or Low Importance options within the draft window. An example of this can be seen below.

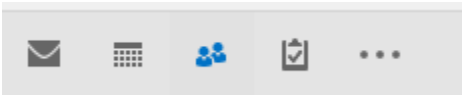


One tool that is extremely helpful is the Email Filter tool. This tool can be found in the Home tab or the ribbon, under "Find." From here we can choose how we would like to filter our inbox. Including the options seen below, selecting "More Filters" will allow us to refine our search parameters to be more robust. This is something I would play around with to get the most out of the feature. These tools can also be accessed in the Search tab of the ribbon.

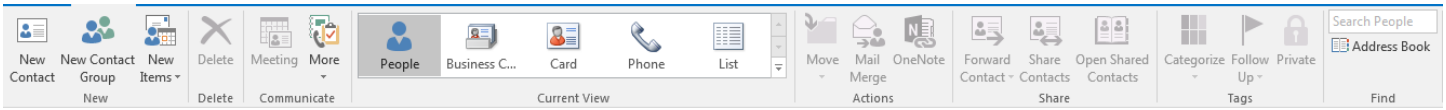


Managing your Address Book (New Contact)

If we want to manage or add contacts to our email client, we can choose the “People” option that is located in the lower left portion of Outlook, it is the blue icon shown in the image below.

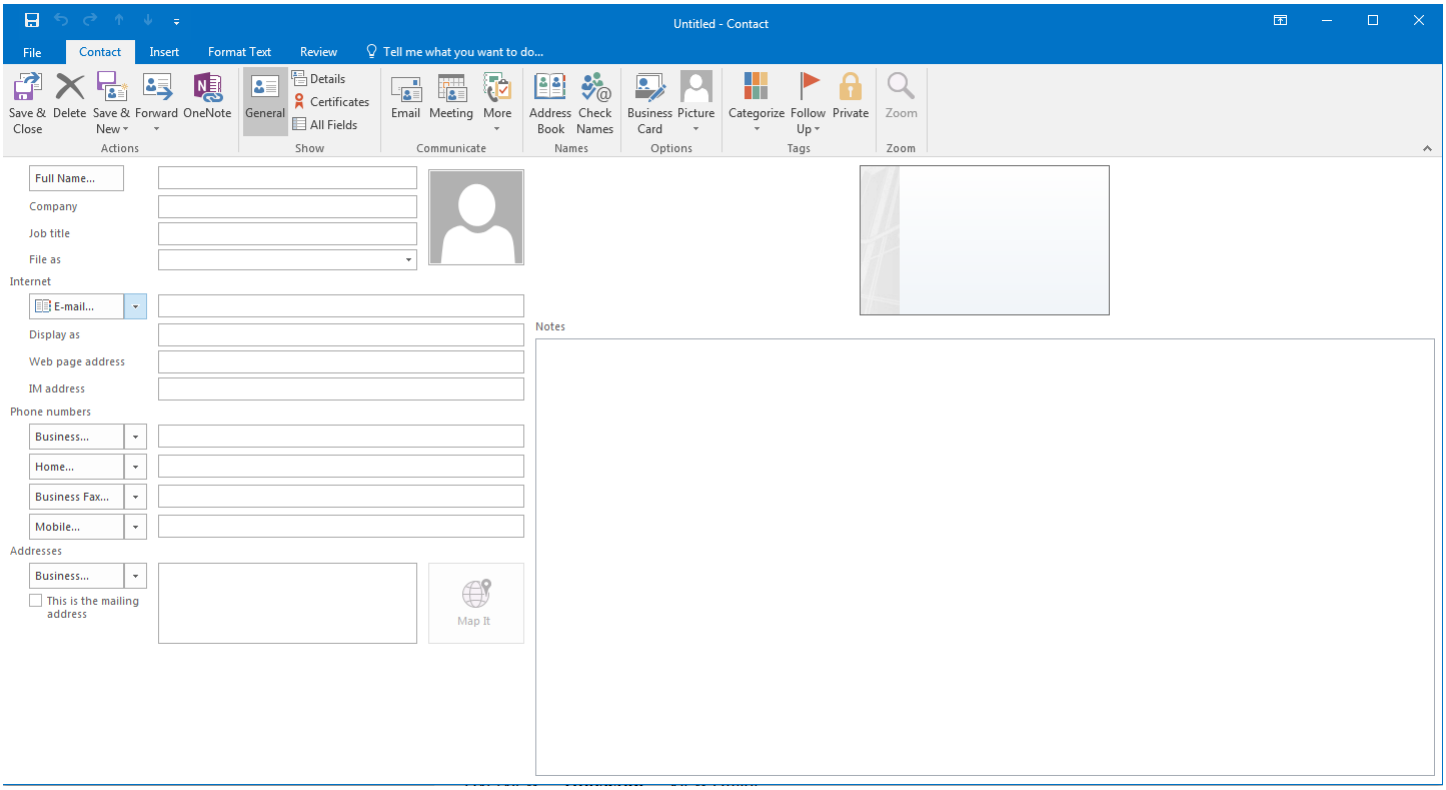


Clicking on this will open our Address Book. Here we are given a new ribbon to work with. This can be seen below.



In this section, we will be working with the two functions found on the right side, “New Contact” and “New Contact Group.”

First we will look at the New Contact function. When you click this button, a large dialogue box will open. This can be seen below.



You can enter in as much information as you would like. As you fill it in, you will see a contact card start to propagate to the right. If you would like to add notes about the contact, you can do it in the area below the contact card. To add a picture for the contact, click on the grey body icon, this can be found next to the Name, Company, and Job Title fields.

Once you are done, you can select Save and Close on the upper right corner of the ribbon. To edit, simply click on the contact and choose edit on the right hand side, then enter the information needed.

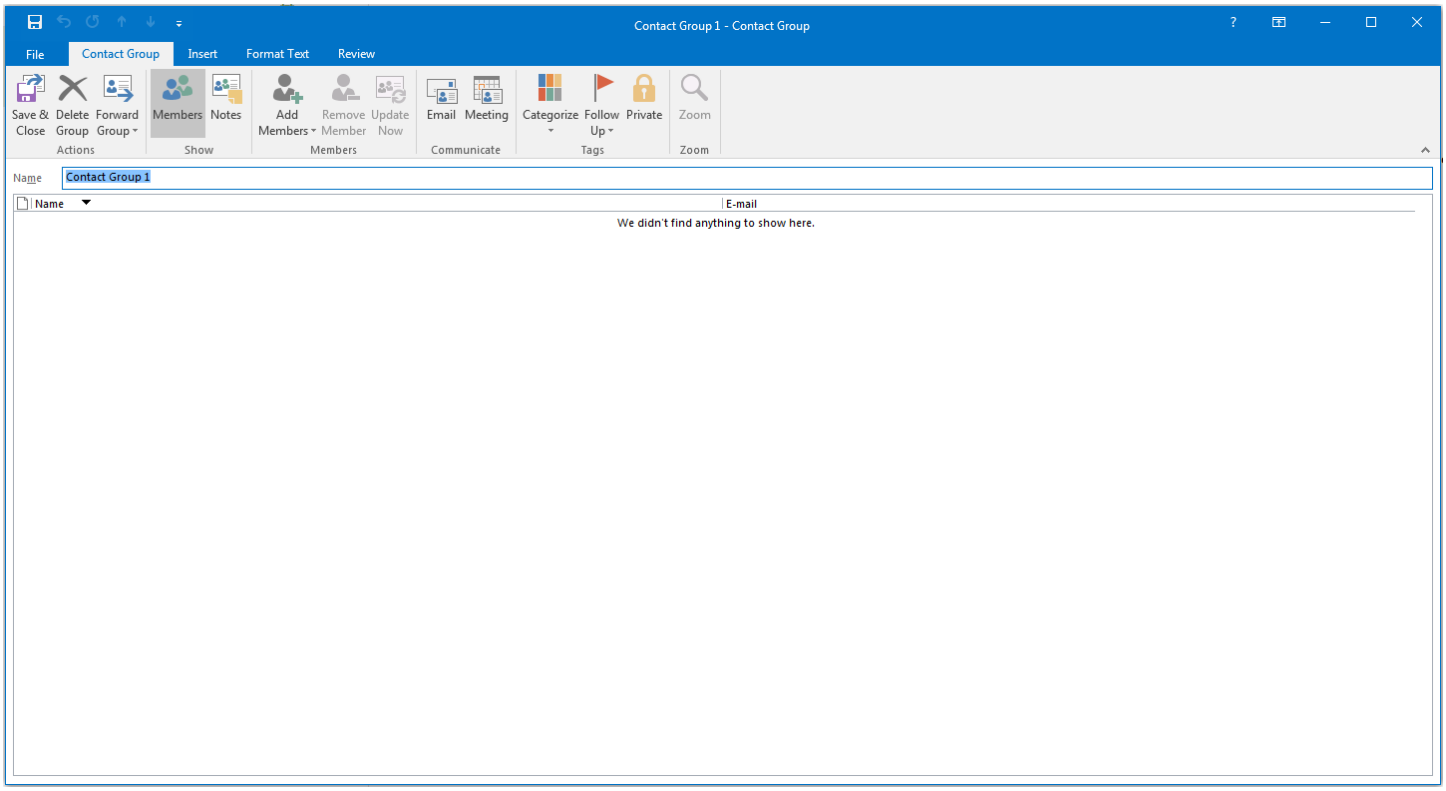
Managing your Address Book (New Contact Group)

Contact Groups can be used to bulk email team members or coworkers. This can be helpful, as you don't need to draft a message and then enter in the email addresses for all the members. Instead you simply click the group and a copy of the message will be sent to all the addresses within the group.

Creating a Contact Group is very similar to creating a new contact. Instead of clicking New Contact, simply choose "New Contact Group," which is located just to the right of "New Contact." Upon clicking it, the screen below will appear.

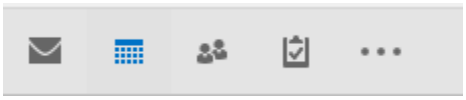
To add members to the group, simply choose "Add Members," members can be added through your address book or you can enter in an email address manually. To delete a member choose "Remove Member" and select the member you would like to remove.

When you are done, simply hit "Save & Close" and you will have a new contract group ready to be added into any messages you have.

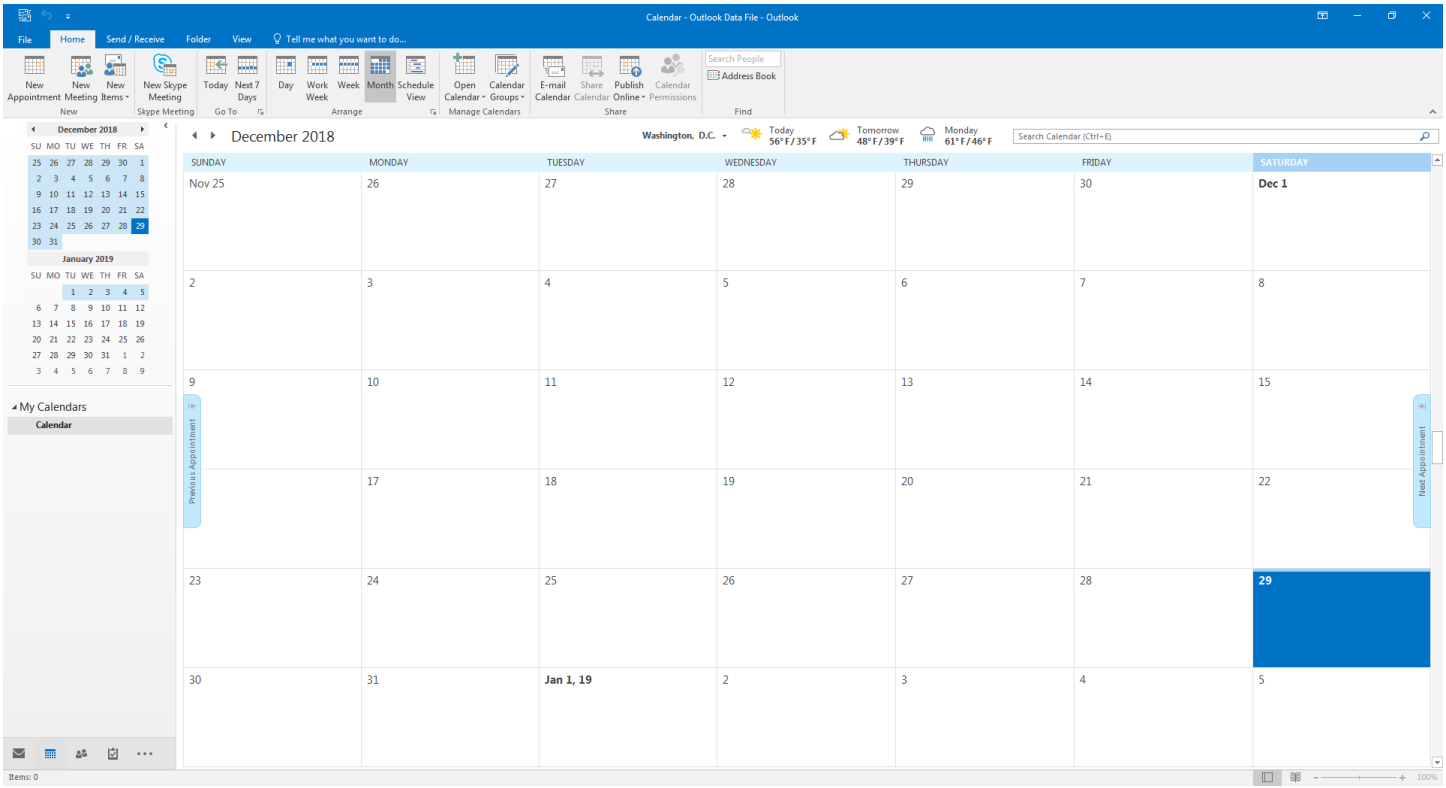


Using the Calendar to Manage Your Time

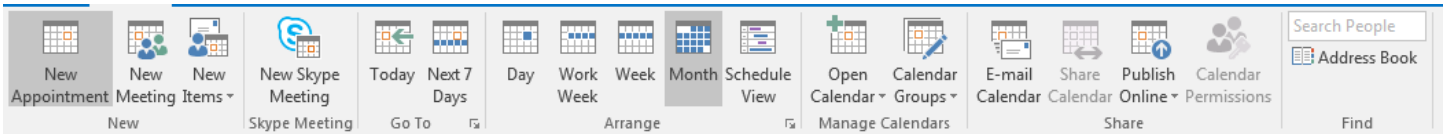
The final tool in outlook that we will be covering is the Calendar. To use this feature we must first navigate to it like we did the People tab. In the lower left corner of Outlook we click on the Calendar function. This can be seen below.



Upon clicking this icon (blue in the image) we will be taken to the Calendar page. This is the default screen.



We will also get a new Home tab in the ribbon, which can be seen in more detail below.



Within this ribbon, we can create new appointments and meetings, as well as arrange our calendar to display by the day, work week, week, and month or we can view our calendar in Schedule View, which breaks our day down by the hour. We can also publish our calendar online, or email it to a colleague.

If we want to jump back to the current day, we can simply press the “Today” button in the “Go To” section of the ribbon.

Next we will cover adding events to our calendar.

Adding Events to our Calendar

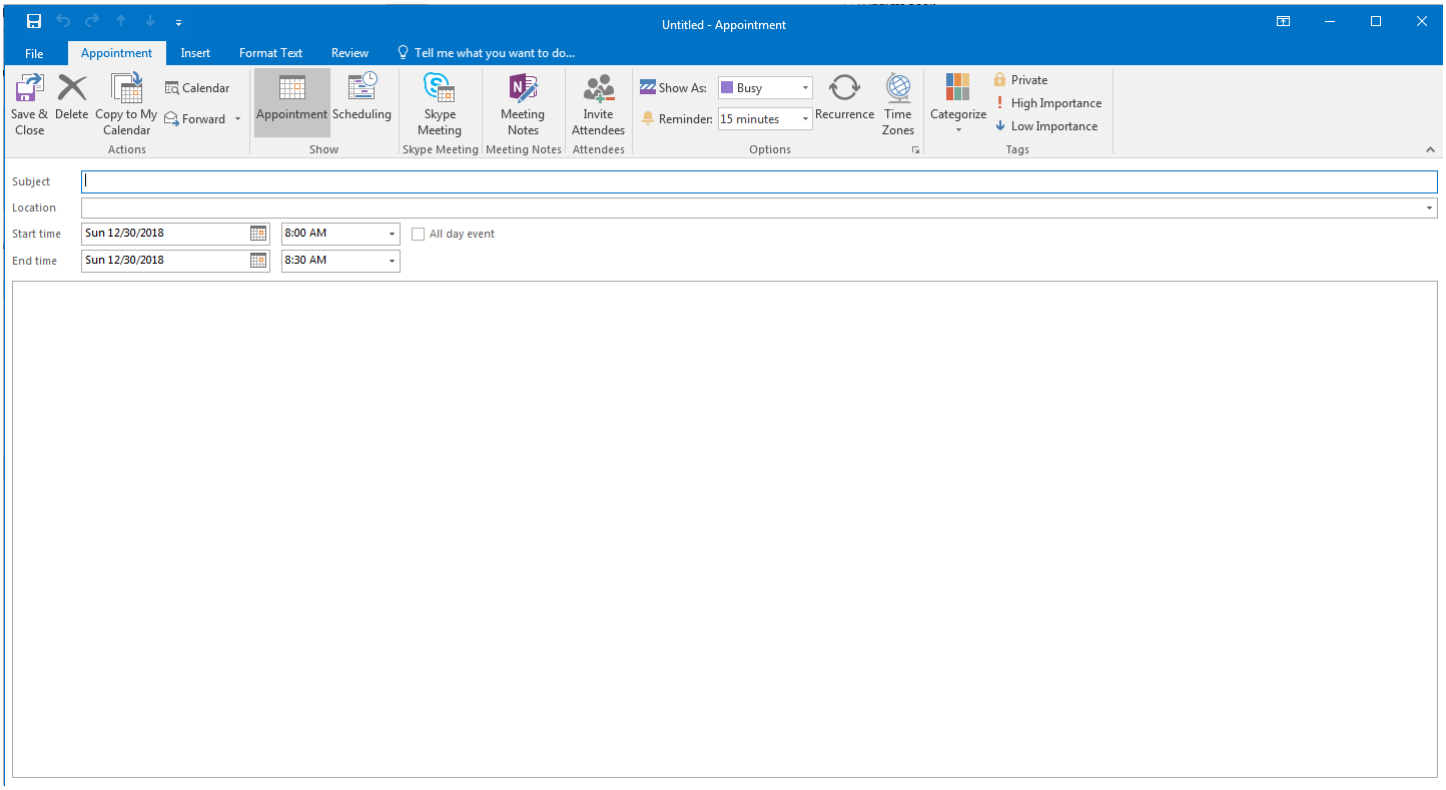
First we will talk about adding Appointments and Meetings to our calendars. When you click on either one, you will get the same dialogue box to create the event. The difference between an Appointment and a Meeting is that an Appointment is with just yourself and a colleague or superior, whereas a Meeting is between many people. We'll start by making an Appointment, but the steps are the same.

Upon clicking "New Appointment" we will be presented with the following dialogue box. Just like with email we can choose how important this appointment or meeting is. We can also set reminders to notify us before the event at a scheduled time. If the event is reoccurring, select the "Reoccurrence" button and select the method from there.

If we want, we can also invite other people to the event. Simply choose "Invite Attendees" and add people just like you would with an email.

If you would like to include notes about the event, you can add that information to the large text box below the other fields.

Simply fill out the information below, and then choose "Save & Close" located on the left hand side of the ribbon.



After saving, our event will appear on our calendar.

If you need to accept an invite from a colleague or superior it will show up as a lighter color, and we simply need to click on it and then from the ribbon you select "Accept" and then "Send Response Now." If you need to decline the invitation, simply do the opposite of the directions from before.