

Outlook Emails on Desktop App

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Glossary

Web browser: this is just what you use to get onto the internet, such as Google Chrome, Internet Explorer or Microsoft Edge.

OneDrive: this is Microsoft's own storage in the Cloud. It works in the background of Office 365 and is your personal storage space. It is secure and cannot be accessed by others.

Device: whatever you are using to access your work on – desktop PC, laptop or smartphone.

Cloud: in simple terms, the cloud is the internet. It's all of the things you can access remotely over the Internet, such as data and programmes. When something is in the cloud, it means it's stored on special internet computers (called 'servers') instead of solely on your device.

Online/offline: whether you are connected to the internet or not.

Application: the different programmes within O365 are called applications, e.g. Outlook, Word, PowerPoint, Teams. Often shortened to App(s).

Icon: the 'logos' of the different applications (e.g. Word is a blue W, Excel is a green E, OneDrive is a blue cloud) or web browsers (e.g. Chrome is a coloured circle)

Desktop apps: applications that are available on your laptop/computer by clicking onto the icon. They may be on your bottom taskbar, or in your Start menu. You don't have to be online to see and access them.

Window: In computer terms, a window is an area on the screen that displays information about a programme. You can have multiple windows open, displaying different websites, documents and applications.

File Explorer: the 'folder' icon that displays along your bottom taskbar; the one you have been using to find your documents, downloads, pictures and desktop.

GDPR: the General Data Protection Regulations. It was introduced to standardise data protection law and give people in a digital world greater control over how their personal information is used.

Ellipsis: the 3 dots you will find next to various names and commands. An ellipsis tends to be used when there is not enough room to display all options.

Uploading: means data is being sent from your computer to the Internet. For example, when you move a document from your desktop into your OneDrive, that is uploading because you are moving it to the Cloud.

Downloading: means your computer is receiving data from the Internet. For example, if you want a document from a website, you can download it to your desktop.

Windows Key: this is a bottom-left key on your keyboard with the Windows icon on it.

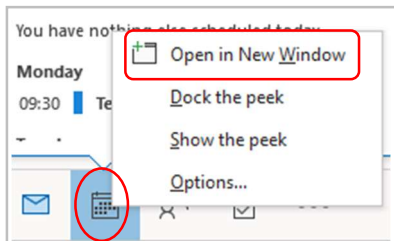
Getting Started

Outlook can be used for your email inbox, calendar management and sharing options (using the cloud via OneDrive). There are 4 sections to Outlook, all represented by icons in the bottom left of your application: Emails, Calendar, People and To Do. Depending on space, some may not display and may be hidden in the ellipsis (the ...).

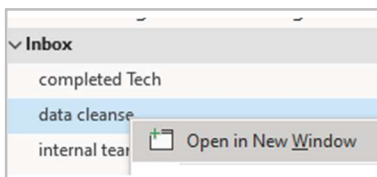


This guide concentrates on Email usage. Please see separate guide for Calendar functions.

TIP: you can have more than one of these open in separate windows. For example, you can have your email open, but also have your calendar accessible too. Just right click onto the calendar icon and choose 'open in a new window'.

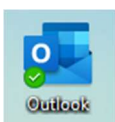


You can do the same if you want any of your Outlook folders to display separately too.



Opening Outlook:

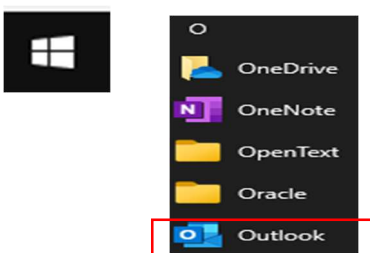
For Outlook desktop app, you should either have it as a shortcut on your desktop



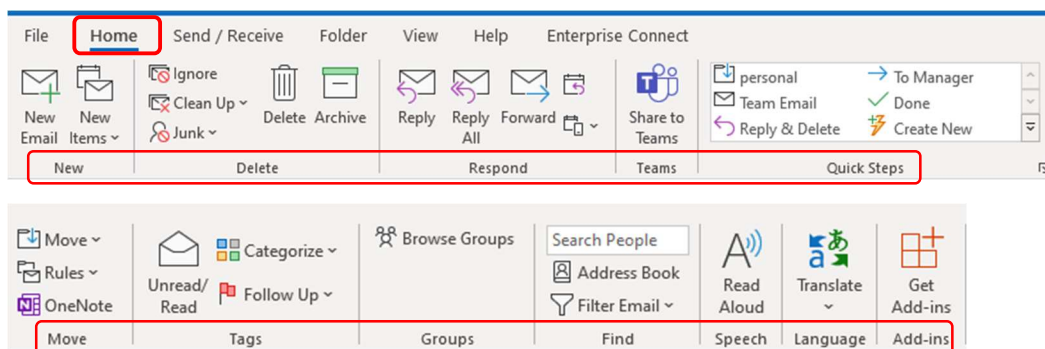
or on your taskbar along the bottom of your screen



or you can find it via Start menu (press Windows key or go into bottom left Windows icon)



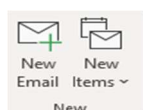
Email – Home tab



The Home ribbon along the top of Outlook has groups called New, Delete, Respond, Teams, Quick Steps, Move, Tags, Groups, Find, Speech, Language and Add-ins.

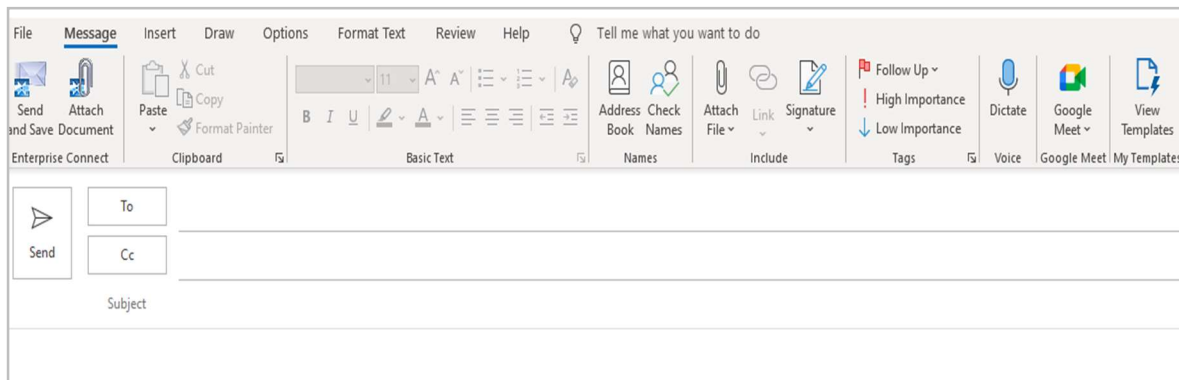
New Email

The New group has 'New email' and 'New items'.



(For an overview on New Items, see pages 34-35 but also please refer to the Teams guides and Outlook Calendar guide available on Inside Barnardos for full guidance on new meetings and appointments.)

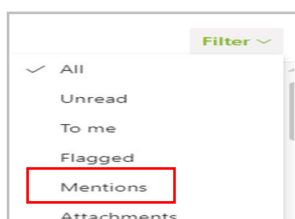
Clicking on 'New email' opens a blank email draft ready for you to type into.



To and CC:

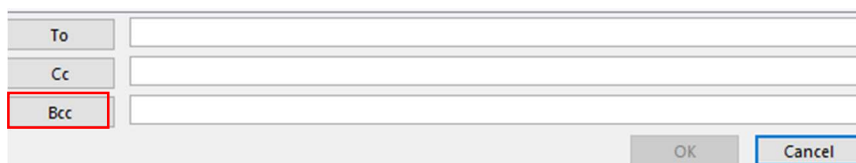
You can click on 'To' and 'CC' and use Add Recipients to find the person you wish to email, or you can start typing a name into the To/ CC fields and the system gives you suggestions.

Alternatively, if you type @ into the body of the email, it brings up suggestions of people you may want to send it to. Click on a chosen name and it auto-types them into 'To' box. Using this method – called an 'At Mention' - also tags that person, allowing them to search their mailbox by the 'Mentions' filter.



BCC:

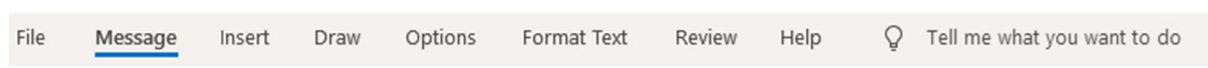
To access BCC (which is 'blind carbon copy'), you need to click onto CC and a box opens within global address list which includes a BCC field option at the bottom.



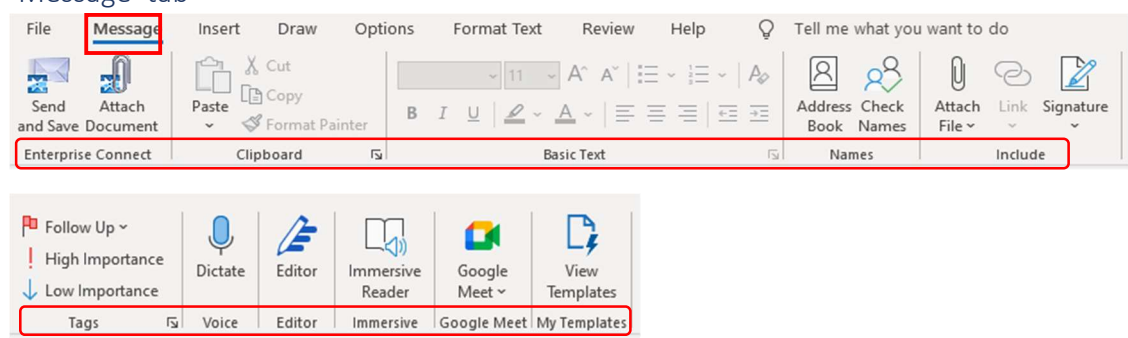
You should use BCC to add an email address that should not be seen by other recipients in the email. It is common practice to use the BCC field when emailing a very long list of people or a list of recipients who may not know each other. This is particularly important when sending to people using their personal email addresses.

TIP: to send a message to multiple people when none of them know the other recipients, you can send the message to yourself and put all the recipients in BCC field.

Along the top ribbon of the 'new email' draft are some tabs. These tabs are arranged according to function: Message, Insert, Draw, Options, Format Text, Review, Help.



'Message' tab



The Message tab includes the groups called Enterprise Connect, Clipboard, Basic Text, Names, Include, Tags, Voice, Editor, Immersive, Google Meet and My Templates.

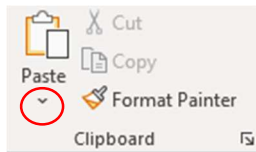
Enterprise Connect group



Send and Save: you can save the email to Enterprise Connect at the same time as sending it to someone.

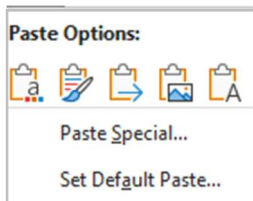
Attach document: when you click onto this, Enterprise Connect opens for you to find your document and attach it.

Clipboard group:

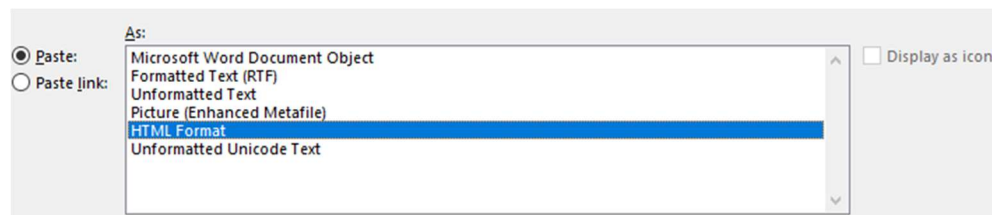


Paste

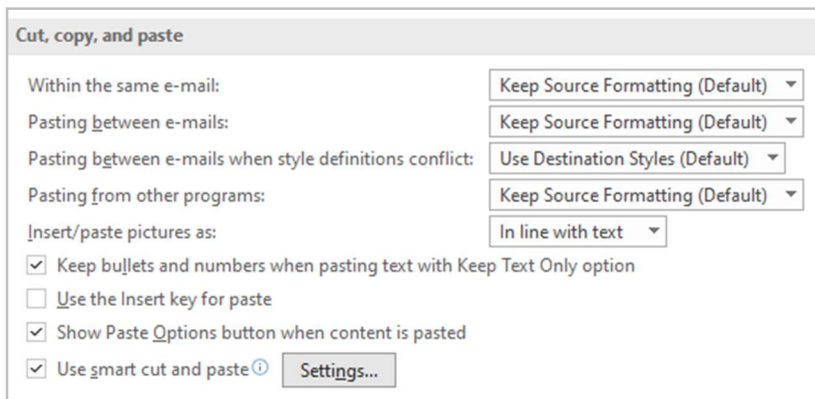
You can use this to paste text into your email from elsewhere. When you click on the drop-down for Paste, you get the choice of keeping the source formatting on the text or changing it to the formatting of the email it is going into, or you can paste it as a picture or 'keep text only' which removes any tables, etc.



Paste special allows you to insert something as a picture, object or various text formats.



Set paste default takes you to the Advanced Options section of your Outlook settings. Use this to adjust your default paste settings as you prefer.

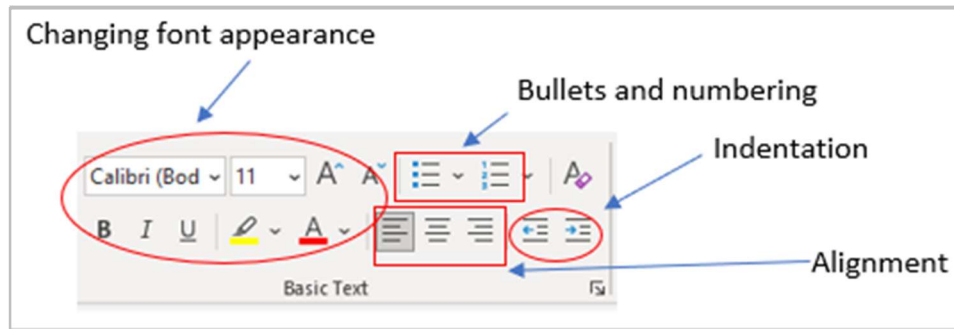


Format painter

This lets you copy formatting from one place to another - things like font, size, colour, spacing. For example, if you like the look and layout of some text, you can highlight that text, click onto Format Painter and then drag your cursor over your new text. It will apply all of the formatting from the original text.

However, Format Painter only works once each time so you do have to keep repeating this if you have various places to use it.

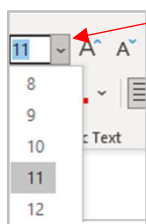
Basic Text group:



Here you can change your font type, size or colour, can insert bullet points or number lists, make something bold, italic or underlined, align your text, increase or decrease the indent, or clear any formatting.

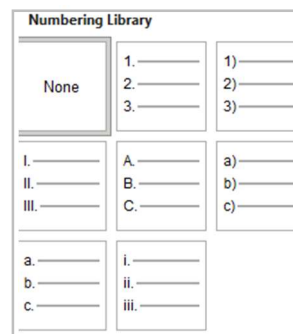
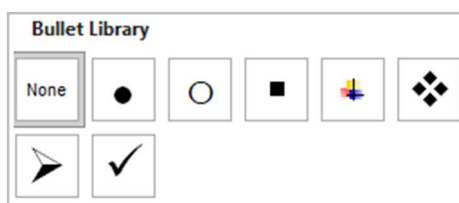
Increasing font size: you can do this either by clicking onto the drop-down arrow next to the font size to choose your size OR using the large A to increase and the smaller A to decrease your size.

The 'A' icons will increase/decrease in multiples of two after size 12 up to 28, so one click on the large A takes you from 12 to 14, and so on. However, you can also nominate your own size if you don't see it in the list – just over-type the number you want into the current font size and press Enter.



Font colour: the default font colour is black but you can change this by clicking onto the red A to select from the standard list or click onto More Colours to 'create' your own choice.

Bullets: from the you can choose types of bullets and different variations of numbering/ABC for your lists.



Alignment and Indenting: you can select the alignment of your text – to the left, middle or to the right of your page.



Or you can use the indent indicators to move your paragraph or bullet points closer to or further way from the left side of your page.

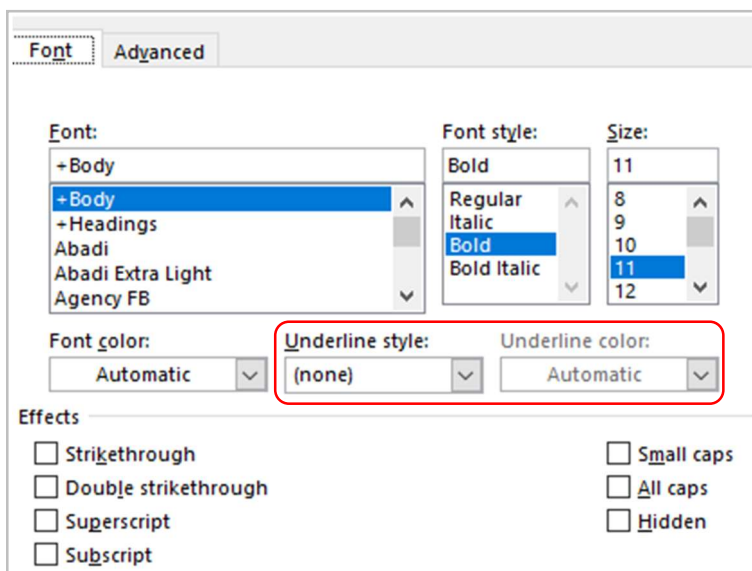
Clear formatting: the icon that is an A with an eraser next to it will clear any formatting you have in your email and take it back to your basic font size and colour.



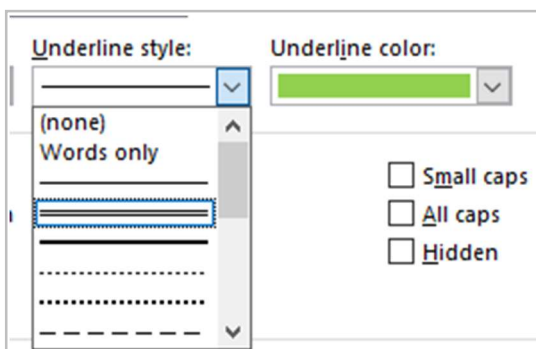
Notice the small arrow in bottom right of Basic Text.



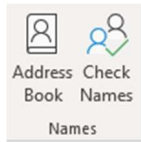
TIP: any groups with this small arrow have more commands available.



If you click onto the drop-downs for Underline Style or Colour, you can choose different types of underlining - dashes, dots, thick lines - or the colour of your underline.



'Names' group

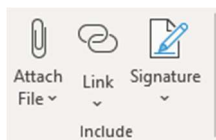


Address Book gives you the same global address list as clicking on the 'To' field does. This is useful if you have a lot of names to input as you can find them each and allocate them to the To, CC or BCC fields easily.

Check names command looks at the email addresses you have typed in to make sure it is possible to send emails to them.

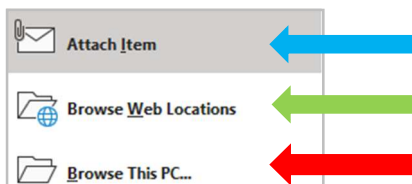
'Include' Group

This is an important group because you can choose to attach a file, insert a link into your email or include a signature.





Attach files


Click onto the drop-down arrow and you get the option of 'Attach Item', 'Browse Web Location' or 'Browse this PC'. It will also display your most recently opened files to try to help you find what you want.

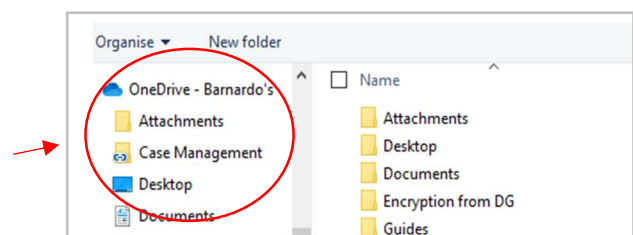
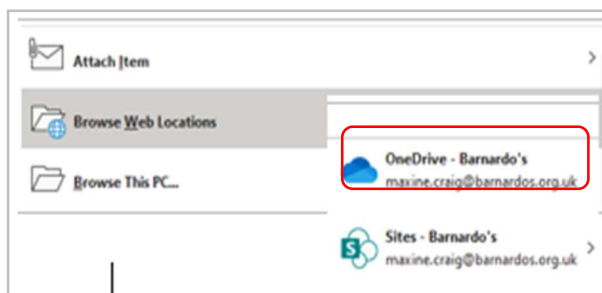


What do these each mean?

 **Attach item** – lets you attach an Outlook email.

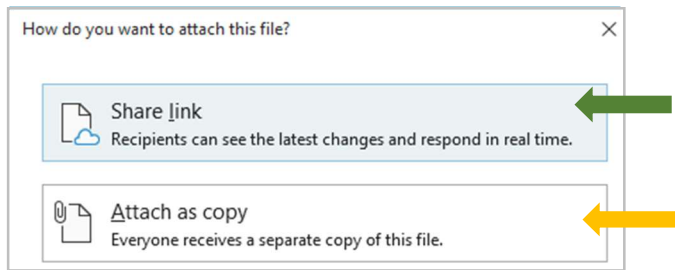
 **Browse this PC** – allows you to attach a document straight from your computer's desktop if you have it saved 'locally'. This will be a **copy** of the document, not the live document itself.

 **Browse web locations** – allows you to share documents online. Click onto OneDrive and it will open a list of your OneDrive files and folders.



Click against the document you want to attach, then click 'Insert'.

You will be asked how you want to attach:



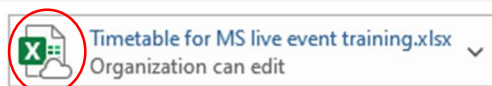
What is the difference?

➡ Attach as a copy takes up space on your email because it attaches a physical copy to it. (Current Outlook limit for file size is 20mb.)

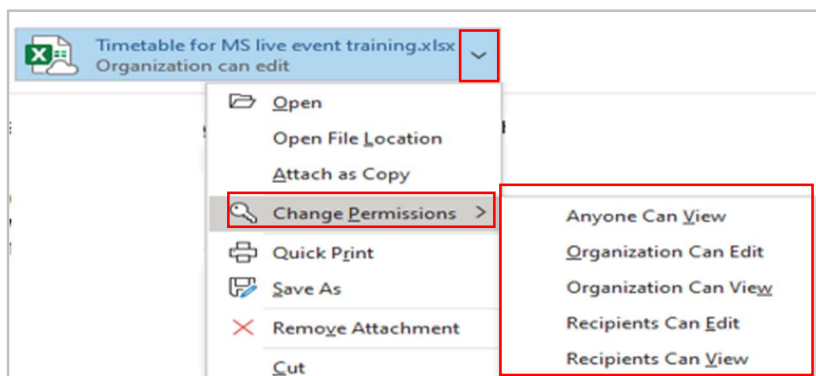
This is a copy, NOT a live version so it's important to remember that this means each recipient gets their 'own' copy and, therefore, would return their own copy if changes were needed.

➡ Share link takes up **no space** on your email because it simply attaches the link to your **live** document. This way, your recipients can collaborate on it in real time.

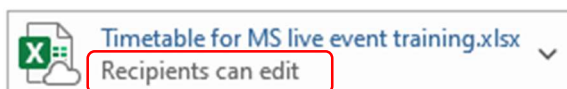
To clarify, sharing as a link displays your attachment with a cloud icon –



Once you have chosen 'share link', you can use the drop-down box to change access permissions before you send the email. **The default is 'organisation can edit'** so make sure this is what you want. If not, choose from anyone can view, organisation can edit or view, recipients can edit or view.



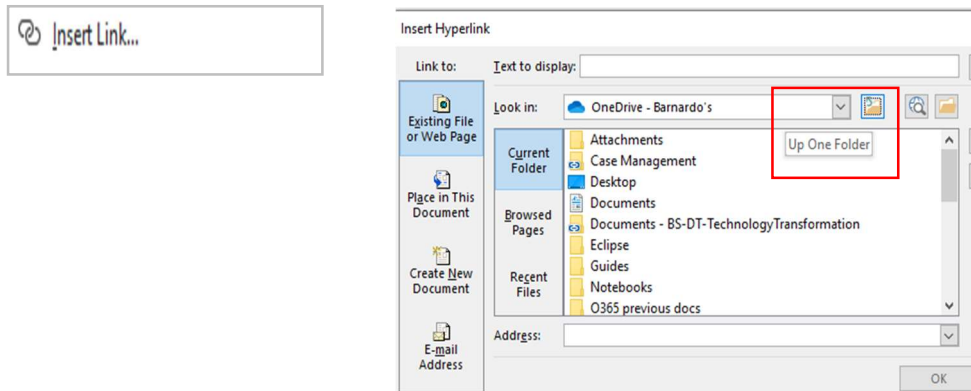
For example, choose 'recipients can edit' and the permission under the document name will change:



As you can see, you can also easily switch to 'attach as a copy' if you change your mind and want to send a physical copy.

Link

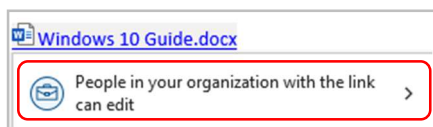
To insert a hyperlink into the body of your email, click onto 'Link' and choose from the list of recent document displayed. If it is not there, click onto 'Insert Link' at the bottom and use the dialogue box to find the document you want to insert the link for. You may have to use the 'up one folder' icon to navigate around to find your document.



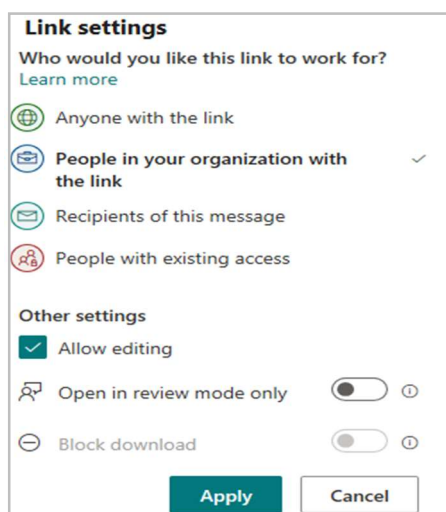
Once you have found your document, click OK and the link to it will be inserted into your email.

 [Windows 10 Guide.docx](#)

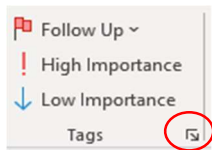
If you need to set permissions for access, just click onto the named link and it will display the default permissions setting of 'People in your organisation with the link can edit'. Remember that this includes anyone internal to whom the link was forwarded without your knowledge, which may not be what you want to happen.



To change this, go into the arrow and a 'Link Settings' box will appear. These options are the same as your OneDrive sharing permissions, except 'Recipients of this message' which only appears via this Outlook email sharing route.



'Tags' Group

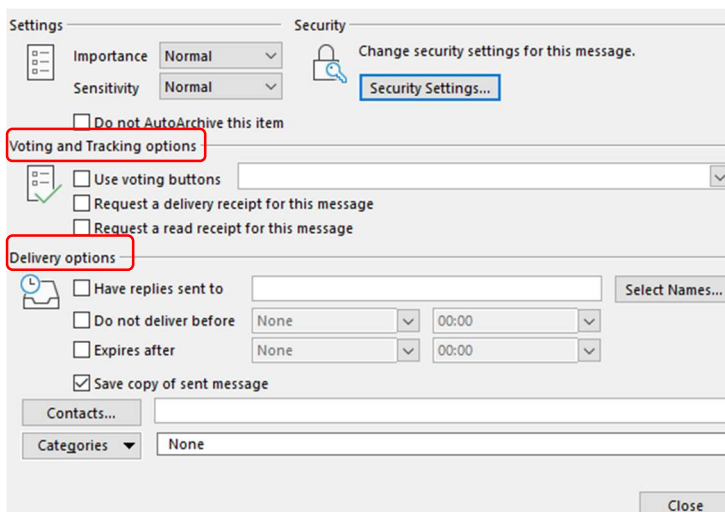


The Tags group lets you set some labelling for your email.

Follow-up: do you want to flag this email so you can follow up today, tomorrow, this week, next week? Do you want to set a reminder to get back to this email?

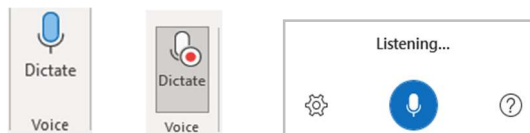
Tags group has a small arrow in the corner for more actions. From this options box, you can:

- set up **voting buttons** to appear on your email
- request a **delivery or a read receipt**
- change importance and sensitivity
- have **replies sent to someone else** (useful if you are part-time or going to be absent)
- set a **delay on delivery** of your email
- put an **expiration date** on your email
- switch on/off saving a copy of your sent email

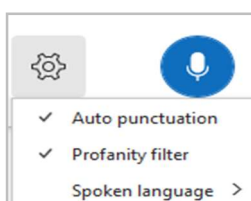


'Voice' group

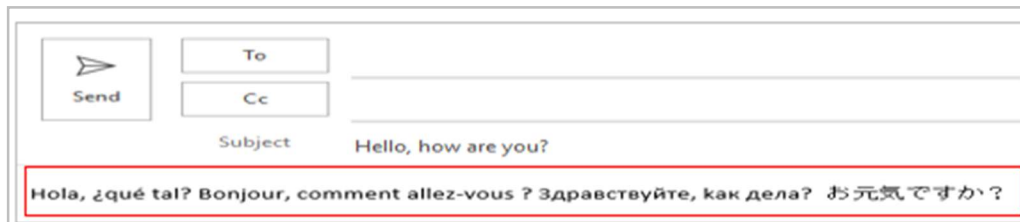
A feature of Office 365 is the ability to dictate. Click onto the Dictate command, the red button will appear and a box indicating 'listening'.



You can use the settings cog to switch on 'auto punctuation'.



You can even choose a language to dictate in and it will type in that language for your recipient to read. Languages currently available are: English, French, German, Spanish, Italian, Swedish, Norwegian, Danish, Dutch, Russian, Portuguese, Finnish, Hindi, Chinese, Japanese Thai and Korean.



'Editor' group

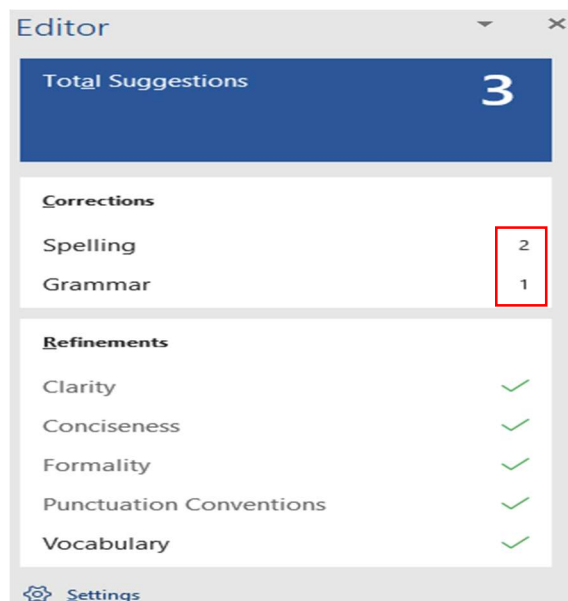


Editor helps you to improve your writing in Word and Outlook Online by identifying words and phrases that might need more clarity. Editor analyses text as you type and makes suggestions when it finds mis-spellings and opportunities for improving.

When Editor is enabled, improved spelling and grammar suggestions will be automatically available to you. Editor is there to help you, but it will not prevent you from continuing with your document if you choose not to take its advice.

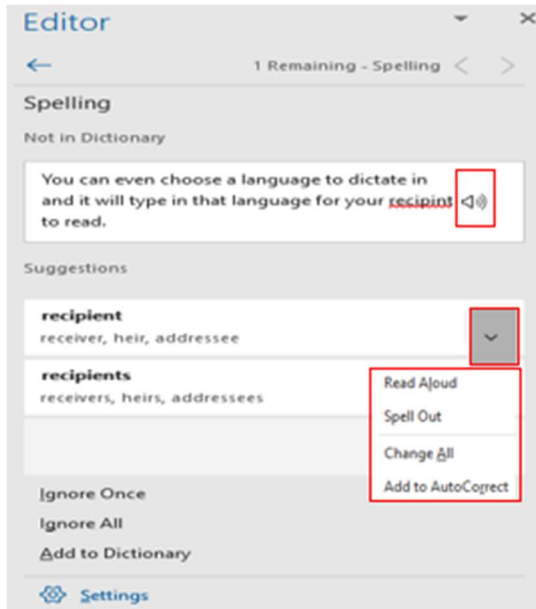
You can find Editor in the Message group and the Review group of a new email's ribbon.

Click onto Editor and a pane will open on the right to tell you how many spelling and grammar errors there are and any refinement issues it has detected for clarity, conciseness, formality, punctuation and vocabulary.



Click onto any of the sections that show a number, and Editor will give you alternatives or tell you what the correction is.

You can click on the 'Read aloud' icon to get the issue read to you, and if you press on the drop-down arrow in the suggestion, you can choose between 'Read aloud', or 'Spell out', 'Change all' and 'Add to autocorrect'.

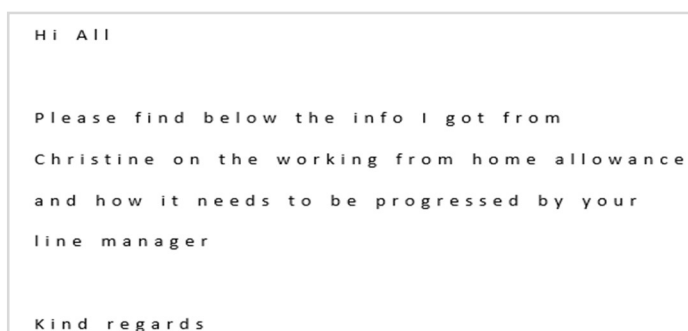


You can click onto the one of the suggestions to make the change, but alternatively you can ignore it or tell it not to check for that issue in future.

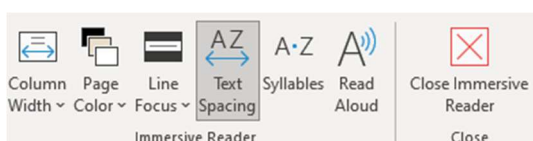
'Immersive' group

You can use Immersive Reader to help with your reading skills. Switching to it gives you the ability to change how text is displayed or even have it read out to you.

When you click into Immersive Reader, your email will switch to IR mode.



Along the top you have options to adapt how Immersive Reader works for you by changing colour, text spacing, column width, line focus and syllable break-up.



Column Width lets you choose between very narrow, narrow, moderate and wide.

Page Colour gives you a variety of colours to display in.

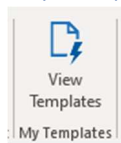
Line Focus lets you choose between no line focus or one line, three lines or five lines being focused on.

Text Spacing allows you to adjust the spacing of the words.

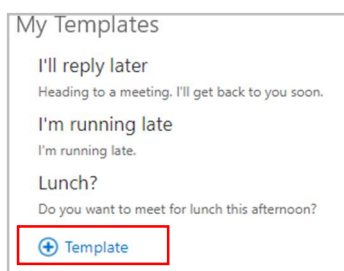
Syllables: divides words by showing small dots between the syllables.

Read Aloud lets you listen to the text being read and with the settings icon you can change the voice or reading speed.

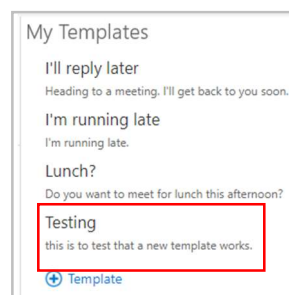
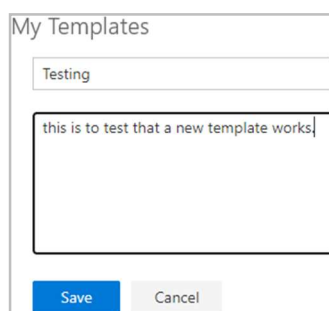
'My templates'



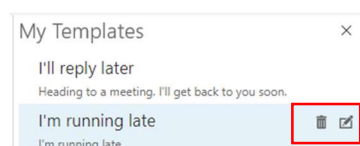
Templates are a way of repeating the same reply. There are three ready to choose from but you can also create your own. Click onto one of the three standard message and it will be put into your email.



To create a new template, select '+ templates'. Input your title and what you want to be said in your emails, then click onto Save. Your template will now appear in the list.

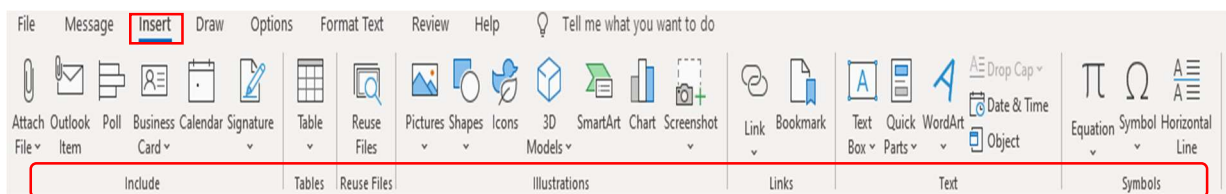


You can edit any of the templates, even those pre-loaded, by hovering over it and choosing the icon with the pen. To delete any of these, just hover over it and choose the bin icon.

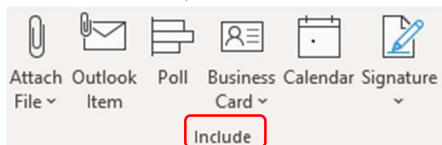


'Insert' tab

This tab houses the groups called Include, Tables, Reuse files, Illustrations, Links, Text and Symbols.



'Include' Group



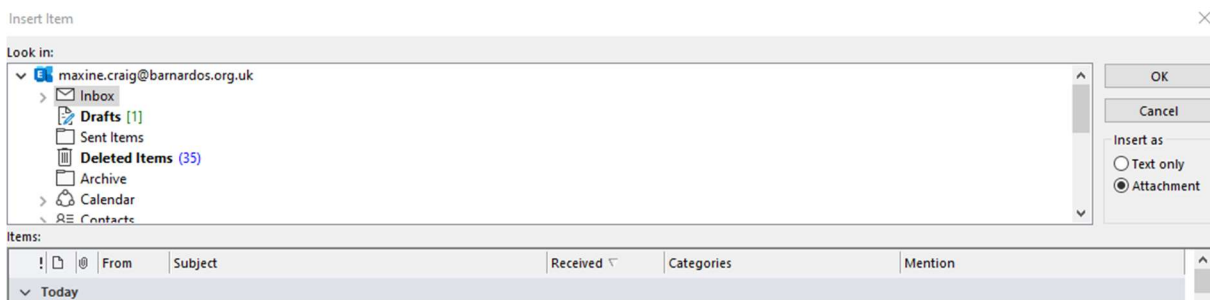
Attach file – this has the same process as the Attach File on pages 10-11 within the Include grouping on the Message ribbon.

Outlook item

Again, you can also find this under Message > Include. Clicking onto this presents your Outlook folders for you to find the email you wish to attach.

Select either Inbox, Sent or any of your Outlook folders to find it.

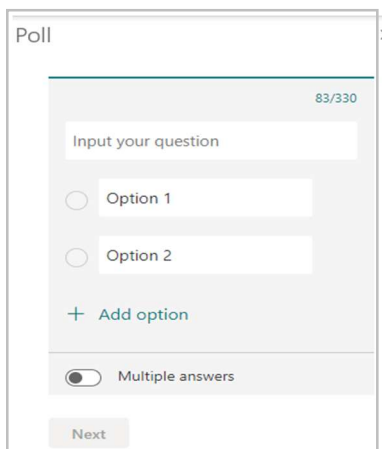
Then click OK.



Your email will now have the Outlook attachment included as an attachment.

Poll

You can use this to create a poll to send out for votes. A box will appear to the side for you to input your question with options.



Poll

83/330

Input your question

Option 1

Option 2

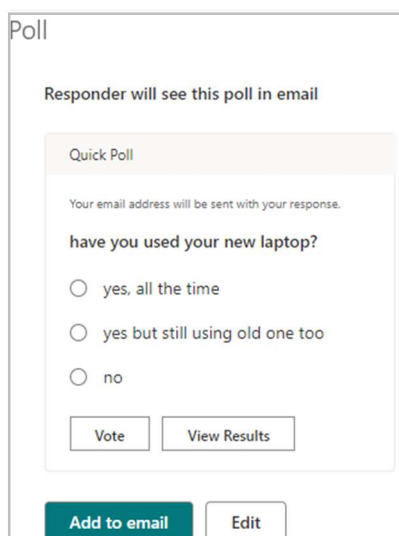
+ Add option

Multiple answers

Next

Input your question and type into Option 1 and Option 2 boxes to nominate your options, adding more if you want. Use the 'multiple answers' toggle button if you want your voters to be able to select more than one choice.

Click Next and you see a box for you to add the poll to your email.



Poll

Responder will see this poll in email

Quick Poll

Your email address will be sent with your response.

have you used your new laptop?

yes, all the time

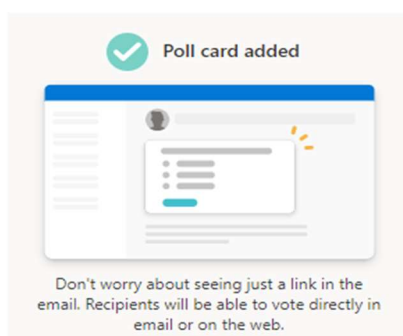
yes but still using old one too

no

Vote View Results

Add to email Edit

Click onto 'add to email' and the poll will be added to your email as a link:



Have you used your new laptop? ([View/vote in browser](#))

The link takes you into Microsoft Forms – either to vote or to view results.

1. Have you used your new laptop?

Yes, all the time

Yes but still using old one too

Not yet

Enter email address *

Please input your email address here.

[Vote](#) [View results](#)

Business Card

This allows you to insert someone’s business card from Outlook into your email.

Calendar

Send a calendar via email. Choose your date range, select Advanced to include details of items marked as private or include attachments within calendar items.

Click Ok.

Send a Calendar via Email

Specify the calendar information you want to include.

Calendar:

Date Range:

Thu 01/07/2021

Detail:

Time will be shown as "Free," "Busy," "Tentative," "Working Elsewhere," or "Out of Office"

Show time within my working hours only [Set working hours](#)

Advanced:

Include details of items marked private

Include attachments within calendar items

Email Layout:

[OK](#) [Cancel](#)

When the recipient receives the email, the calendar will display and there will be a command at the very top of the email for them to ‘open this calendar’. It includes an attachment that your recipient can upload, open, copy or save.

July 2021

Mo Tu We Th Fr Sa Su

1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30 31

Legend:

- Busy
- Out of Office
- Tentative
- Working Elsewhere
- Free
- Outside of Working Hours

July 2021

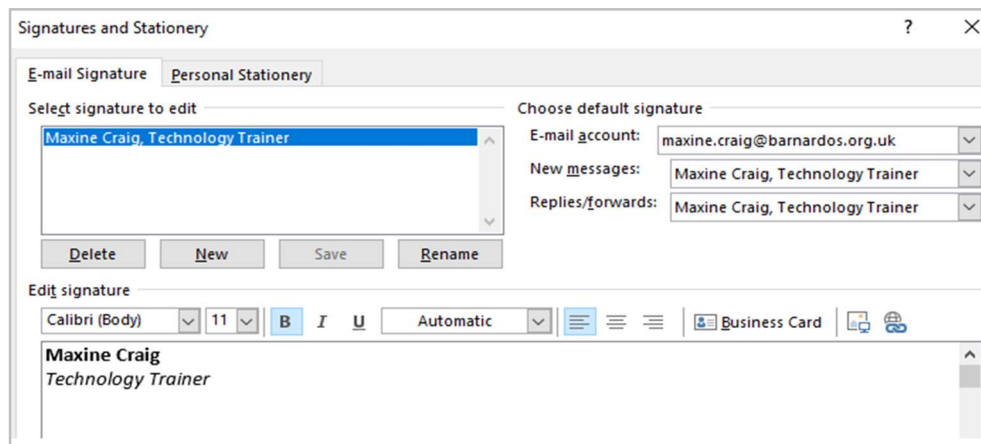
1 Jul

Before 08:00	Free
08:00 – 09:30	Free
09:30 – 10:30	Busy
10:30 – 11:00	Free
11:00 – 12:00	Busy
12:00 – 12:30	Free
12:30 – 13:30	Busy
13:30 – 17:00	Free
After 17:00	Free



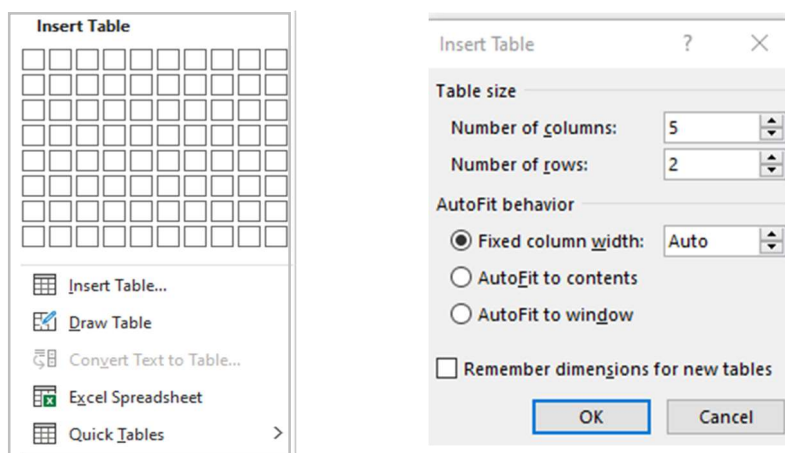
Signature

Using this command pastes your signature into your email or allows you to set up a signature/make amendments to it.



'Tables' Group

As with a Word document, you can insert a table into your email and the process is the same as in Word. Hover over the 'insert table' grid and choose how many rows and columns you want in your table. Or choose 'Insert Table' and allocate number of columns and rows along with auto-fit behaviour.



Click 'Draw Table' to get a pointer that lets you draw your own table, rows, and columns and vary the sizes of the table cells.

Click 'Excel Spreadsheet' to add a spreadsheet in your message. It's like a mini version of Excel in your message that you can use to add formulas and perform calculations.

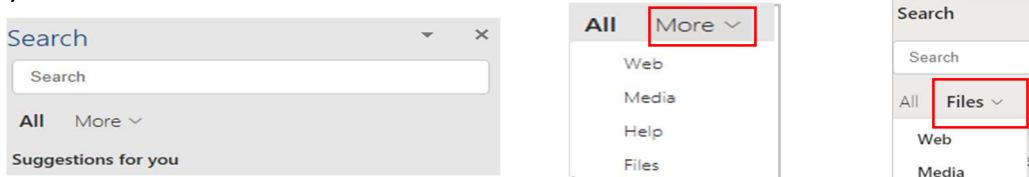
Click on 'Quick Tables' and then click the table you want. Replace the contents in the table with your own.

'Reuse files' Group



As with Word and PowerPoint, Reuse Files is a feature that allows you to search for documents and re-use parts of them in your email. You can insert a block of text or other content from a different file without leaving the email you're currently working on.

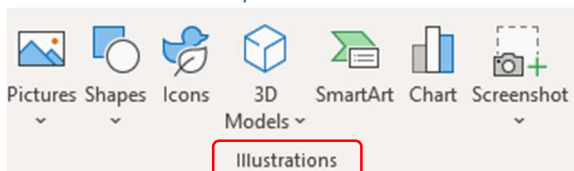
Choose 'reuse files' and it will present a search bar on the right plus some suggestions for you.



Clicking onto the 'More' arrow allows you to narrow down the source of the information you wish to find. For example, if you only want in-house documents, choose Files; if you only want pictures, choose Media.

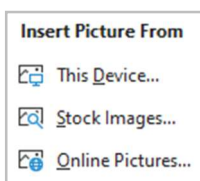
The function is intelligent enough to work out what you are working on and tries to offer results built on similarity of subject. For example, choosing 'Web' whilst working on an accessibility document will give you various internet pages related to accessibility. Choosing Media presents you with accessibility images and logos, and Files brings up relevant documents (Word, PowerPoint, Excel) already stored on SharePoint or OneDrive.

'Illustrations' Group

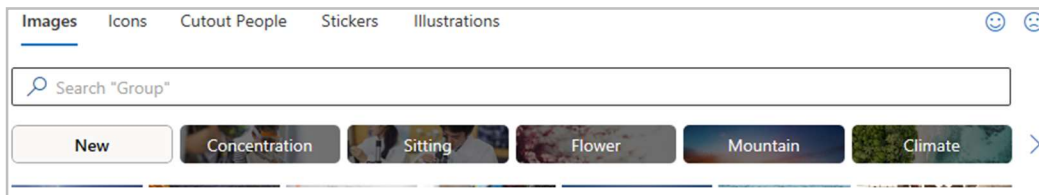


Illustrations allows you to insert pictures, shapes, icons, SmartArt, charts and screenshots into your email.

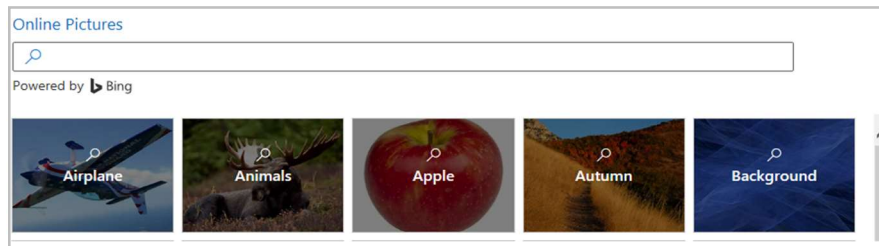
Pictures: you can click onto this to get access to images from either your computer, Microsoft stock images or online pictures.



Stock Images gives you a choice of various images, icons, cut-out people, stickers and illustrations, each with an option bar for different themes.



Online Pictures allows you to input words into the search field to target your subject or use the slider on the right to find a subject.



Shapes: you can draw or insert shapes from the gallery, such as lines, boxes, arrows, stars, banners, text boxes.

Icons: this gives you the same icons link as Pictures does but obviously goes straight to the options.

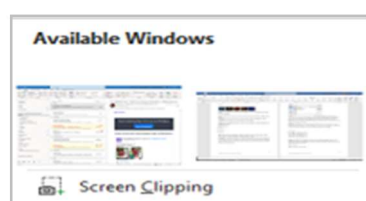
3D Models: lets insert a 3D model so you can rotate it to see from all angles. Use the common themes displayed or use the search bar to find others.

SmartArt: insert a SmartArt graphic from lists to process diagrams and Venn diagrams and organisational charts.



Chart: insert a chart of various types – bar, line, column, pie, area, scatter, map, surface, radar, treemap, sunburst, histogram, waterfall, funnel or combo.

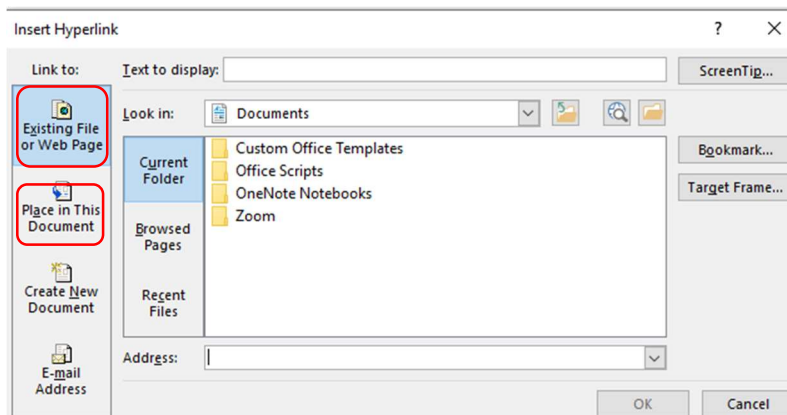
Screenshot: you can use this to take a screenshot of any window you have open. Click onto screenshot and choose the window you want to screenshot. Or click onto screen clipping to crop a smaller area. Any screenshot you take will be automatically inserted into your email without you having to paste.



'Links' Group



Link will insert a hyperlink to a webpage or document. If you click onto the chain icon, you get a dialogue box; use the navigation options to find your document or webpage and click OK.

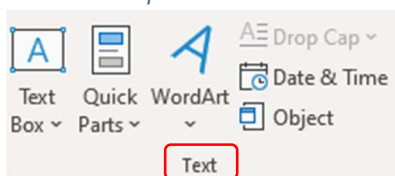


But if you click onto the drop-down arrow under 'Link', you will get a list of your recent documents to choose and it then inserts the link into your email. Or you can click onto 'Insert Link' at the bottom of the box to get the same search box as above.

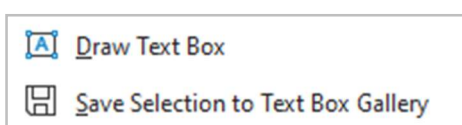
Remember that you can have a hyperlink leading to somewhere else in your document. Use 'Place in this document' for this.

Bookmark – bookmarks let you jump to a place in your email. To add a bookmark, you first mark the bookmark location in your email. After that, you can jump to the location or add links to it within your Outlook message. You can also delete bookmarks from a message.

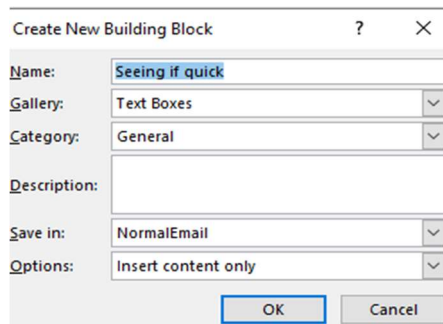
'Text' Group



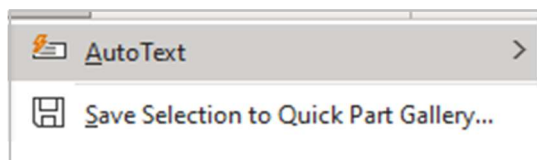
Text box brings focus to the content within it and can showcase important text such as headings or quotes. If you highlight text with your cursor then choose 'draw text box', a box will be put around those words.



If you choose 'save selection to text box gallery', a new box appears where you can set up a building block. (See link below for further help)



Quick Parts: Use the Quick Part Gallery to create, store, and find reusable pieces of content, including AutoText, document properties such as title and author, and fields. These are called building blocks and you can access and reuse them at any time. You can also save them and distribute them with templates so that other people can use the building blocks you created.



AutoText is reusable content that you can store and access again and again.

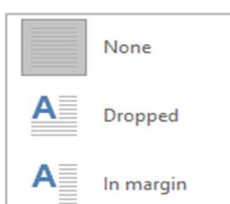
Click AutoText to access the AutoText gallery. You can save AutoText to the AutoText gallery by selecting the text you want to reuse, clicking AutoText, and then clicking Save Selection to AutoText Gallery. By filling in the new building block information you store the content you save to use again and again.

If you are interested in finding out more about building blocks please see this Microsoft page:

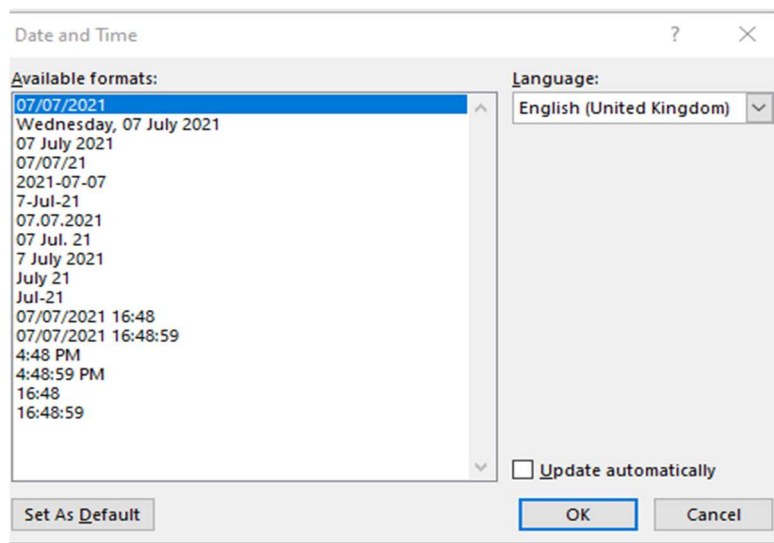
<https://support.microsoft.com/en-us/office/create-reuseable-text-blocks-for-email-messages-8fb6c723-c960-4c8c-9790-3e43ddc4b186>

Word Art is a quick way to make text stand out with special effects. You begin by picking a WordArt style from the WordArt gallery on the Insert tab, and then customise the text as you wish.

Drop Cap creates a large capital at the beginning of a paragraph.

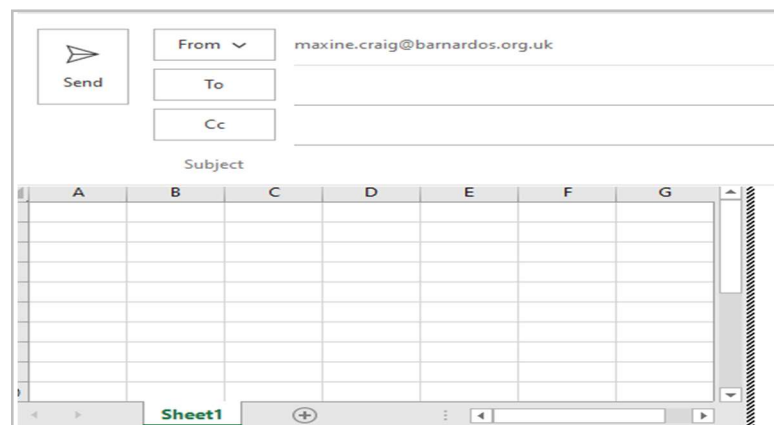
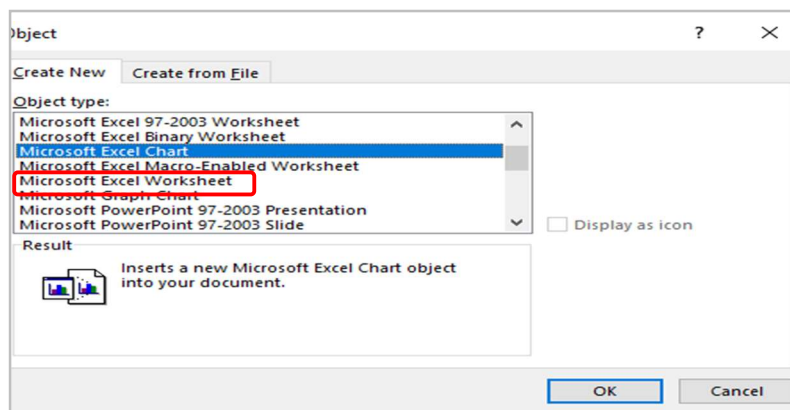


Date and time – select the format you want for any date and time in your email.

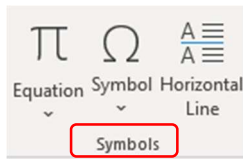


Object – as with Word, this inserts an embedded object into your email, such as Word or Excel document. **However, for emails this is not always a good option**; for example, if you click onto Adobe document, then select an Adobe document, it puts the whole document into your email as pictures, not the document itself. There are much more effective ways of putting a document in your email.

Choosing an Excel worksheet will insert a small worksheet into your email with the Excel ribbon along the top for you to adjust and input into your spreadsheet. Then click out of the Excel mini-workbook to revert to the email with your created table in.



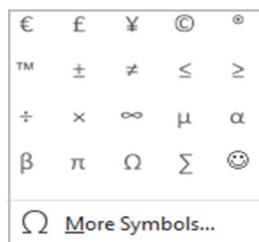
'Symbols' Group



You can input an equation, a symbol or a horizontal line across part of your email.

Equation brings up a list along the top for you to choose from.

Symbols gives you access to hundreds of symbols, including currency and different alphabets such as Cyrillic, Greek, Hebrew, Arabic.



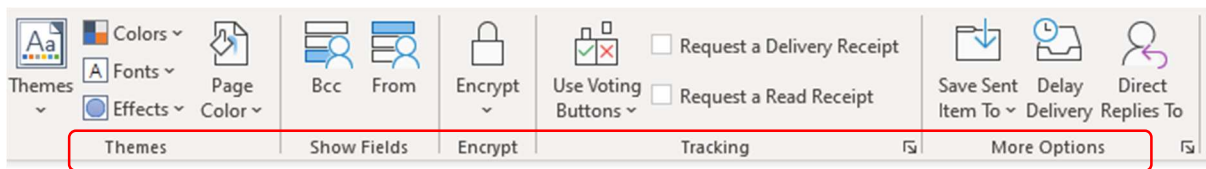
'Draw' Tab



Draw allows you to insert a canvas and start drawing using the tools displayed. You can do this with your mouse, with touchscreen or with the mouse keypad on your laptop.

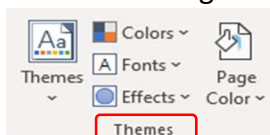
'Options' Tab

The options group is where you'll find the commands for things you won't use in every email, such as colour and effects, encryption, voting buttons and requesting a read or delivery receipt.



'Themes' Group

This group holds your options for how your email looks: colour and size/type of font, effects of font and themes. However, these don't work in plain email text, but you can use 'Page Colour' to change the background colour of your email.

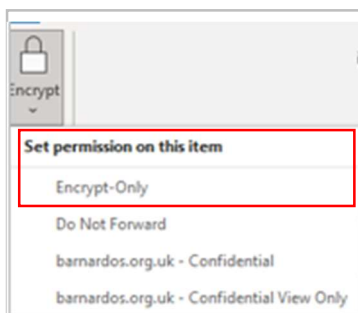


'Show fields' Group

This is where you choose for your emails to show the 'BCC' field or the 'From' field. Just click on either of these to display it when you send an email.



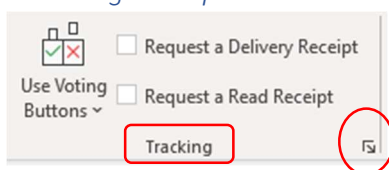
'Encrypt' Group



This has some encryption options but you should only use **Encrypt Only**. Please read the Barnardo's Encryption guide for more in-depth instructions for encrypting emails within the organisation.

<https://inside.barnardos.org.uk/resources-and-guidance/our-it/software-and-systems/encrypting-emails>

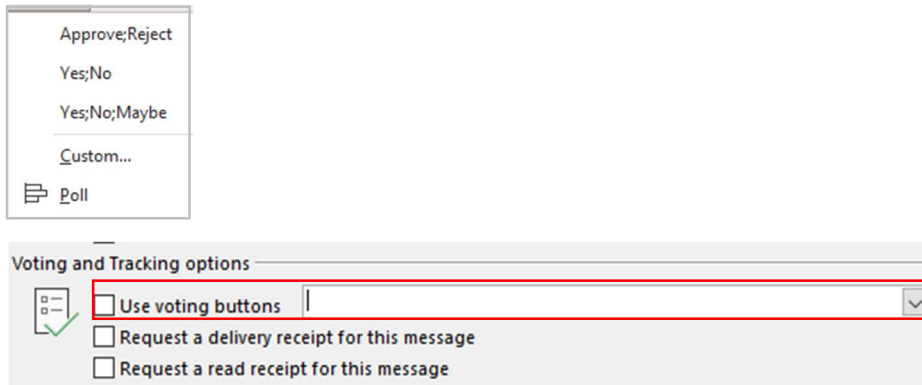
'Tracking' Group



Voting buttons

You can add voting buttons to your email so your recipients can vote for options you nominate. You can select the basics or can customise options using 'Custom' which opens the same properties box as does using the small arrow in the corner of 'Tracking' group.

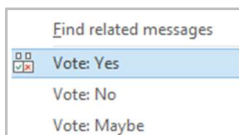
There is a section for voting and tracking options – if you want different voting options, type them into the ‘use voting buttons’ box.



The email arrives to the recipients with a message in the ‘To’ field:



When they click onto the ‘click here to vote’, they can see the options you have set.



The votes get sent back to you as special email messages from each of your recipients.



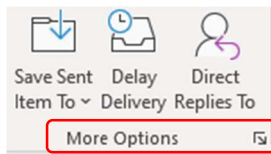
‘Request a delivery receipt’ and ‘request a read receipt’

These are standard notifications that your email has been successfully delivered or has been read by its recipients.

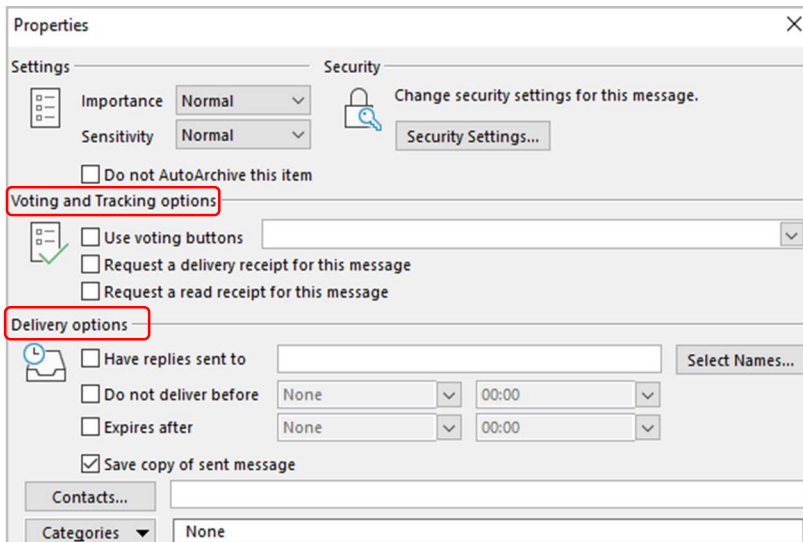
TIP: the small arrow in the corner of the Tracking group also appears in the More Options group below and the Tags group (see page 13), and all lead to the same Properties box. Therefore, you can use any of the Tracking, More Options or Tags groups to:

- set up voting buttons
- request a delivery or read receipt
- adjust importance
- switch on/off saving a copy of your sent email
- set a time and date to deliver your email
- have replies sent to people other than yourself.

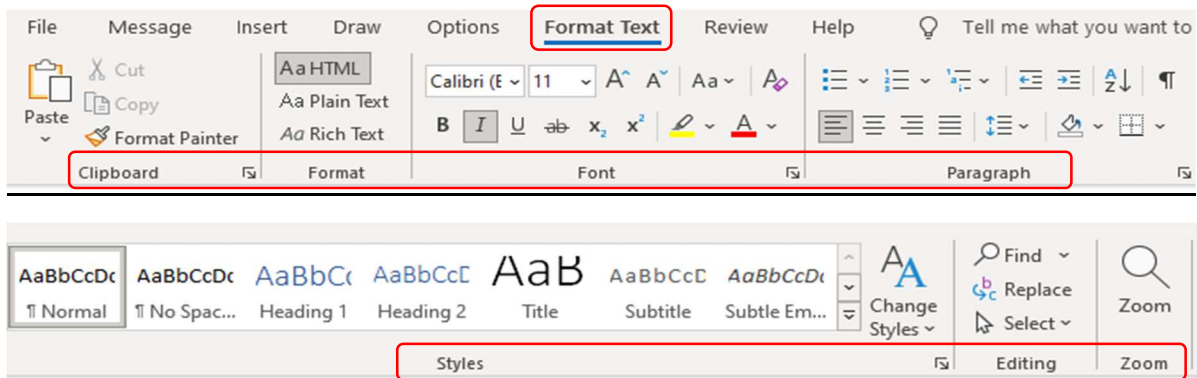
'More options' Group



Clicking onto any of these commands brings up the Properties box that is also attached to Tags group and Tracking group for you to delay delivery of your email, set replies to go to another email inbox, or where/if to save your sent items.



'Format Text' Tab

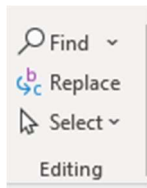


Format Text tab includes some groups that are found in the Message tab, such as the Clipboard, plus Font and Paragraph which are Basic Text. This tab covers Style, which is if you want to use tables of content-type hierarchy within your email, plus Editing and Zoom.

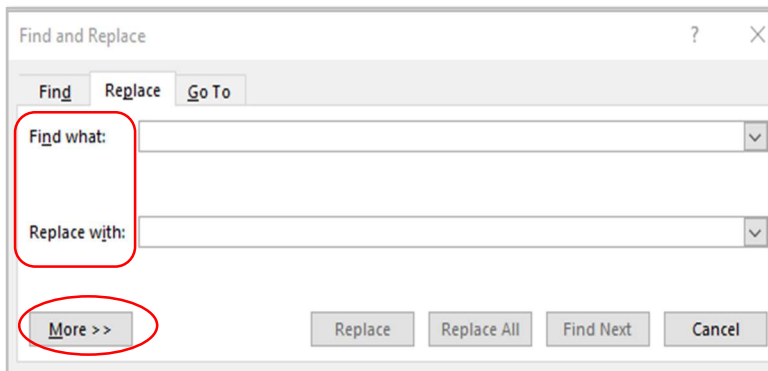
'Format' Group

Unless you are experienced at formatting text, you will probably not use this group. HTML messages can contain formatting, Plain Text messages cannot contain formatting, and Rich Text messages can contain formatting but are only compatible with Outlook and Exchange.

'Editing' Group



As with Word, you can use this group to find, replace and select text in your email. Replace is useful if you want to change the same word more than once. Just tell the box what to find and then type your replacement word(s) into the 'replace with' box.

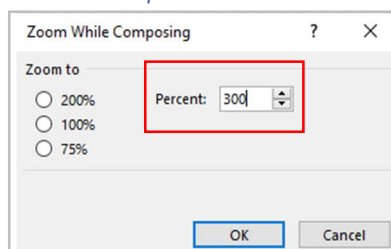


You can even choose some further options by clicking onto the 'More>>' button, which brings up tick boxes for 'match case', 'find whole words only', and 'use wildcard'.



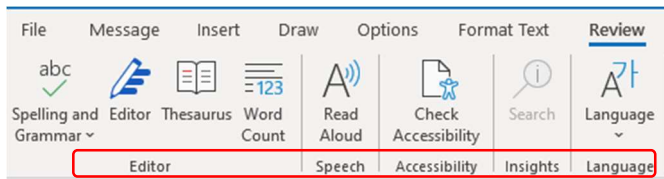
Wildcard gives you the chance to search for a word if you don't fully know how to spell it. The question mark matches any single character; the asterisk matches any group of characters. For example, searching for **q?estion** will find 'question', and searching for **wo*d** finds text such as word, world, and worshipped.

'Zoom' Group



Zoom will increase the text in your email. You can choose up to 200 percent by clicking onto those options, or you can type a number into the 'Percent' box to increase beyond that.

'Review' Tab



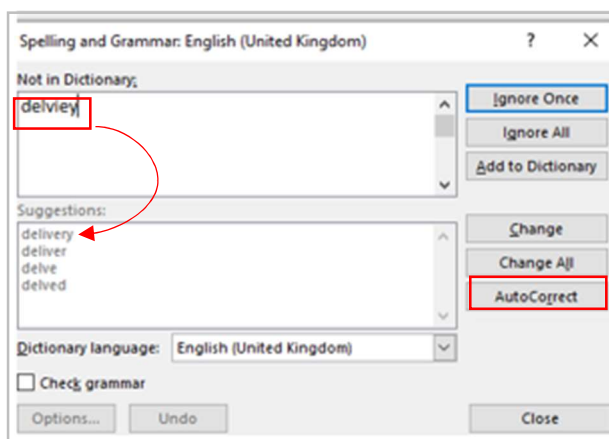
The Review tab is where you'll find the things to check what you have written before you send your email. Does the spelling or vocabulary need looking at? Does your email need to be translated? Do you need it to be read aloud to you? Does it need to be accessible?

'Editor' Group

This group includes the commands for Spelling and Grammar, Editor, Thesaurus, and Word Count

Spelling and grammar

Using this highlights any errors and suggests what you might have meant. You can either choose the word you want from the Suggestions box and click 'Change/Change All,' 'Ignore' or 'Add to Dictionary' (so it doesn't get highlighted again).



You can even use **Auto-correct** if you often mistype a word: click onto the correct spelling in the suggestions box, then click onto 'Auto-correct'. From now on, when you mis-type with that spelling, Outlook will auto-correct it to the word you meant.

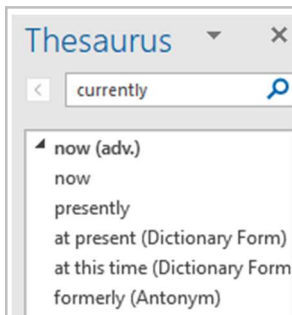
Note: if you already have Editor switched on, your mis-spelling will have a red line under it and clicking onto that will bring up suggestions for you.

Editor

See pages 14-15 for help with Editor as it falls under the Message tab too.

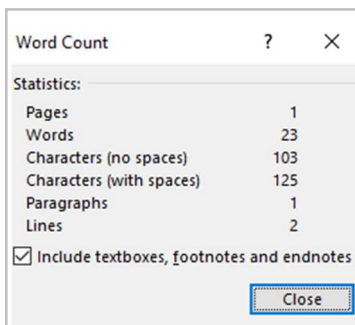
Thesaurus

A thesaurus helps you to find alternatives for words. Highlight a word(s) and a thesaurus pane appears to the right with suggestions for other ways to say what you want to say.



Word Count

If you want to know how many characters or words you have put into your email, click onto Word Count and a table will display the counts.



'Speech' Group

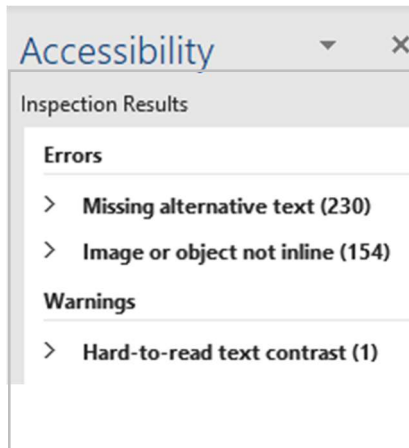
This is the Read Aloud feature that is found across Office 365. Clicking onto this command brings up a small toolbar with controls to start, pause, rewind and forward. In the settings, you can change the voice and reading speed.



'Accessibility'

As with other Office 365 applications, this checks the accessibility of your email.

An Accessibility Inspection results pane opens to the right and results are presented in three types: Errors, Warnings and Tips.



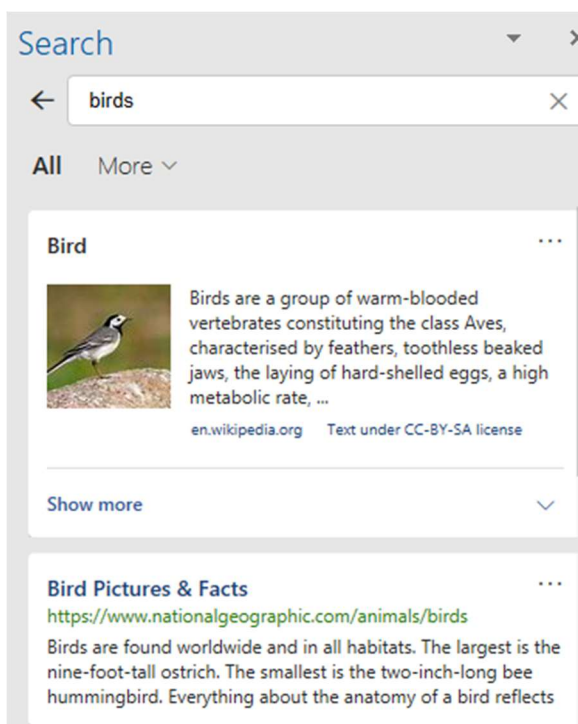
Errors – these cannot be read by screen readers

Warnings – these would be difficult to read

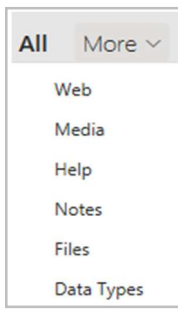
Tips – might cause problems

'Insights'

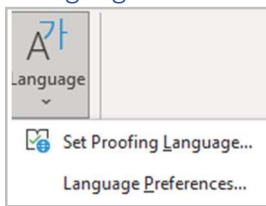
Let's you search for images, definitions, document and webpages related to what you are emailing about.



The drop-down arrow allows you to narrow the search to web pages, media (images) or files (internal documents)



'Language'



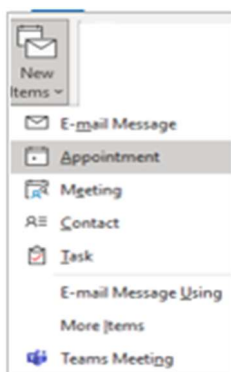
This allows you to set a proofing language other than English or choose language preferences.

For further details of how to use this function, please see the comprehensive Microsoft Translation Tools user guide on Inside Barnardo's.

<https://inside.barnardos.org.uk/microsoft-365-translation-tools>

New Items

On Home tab's 'New' group, there is also an option called 'New Items'. Under this drop-down area you can choose Email, Appointment, Meeting, Contact, Task, or create a Teams meeting.

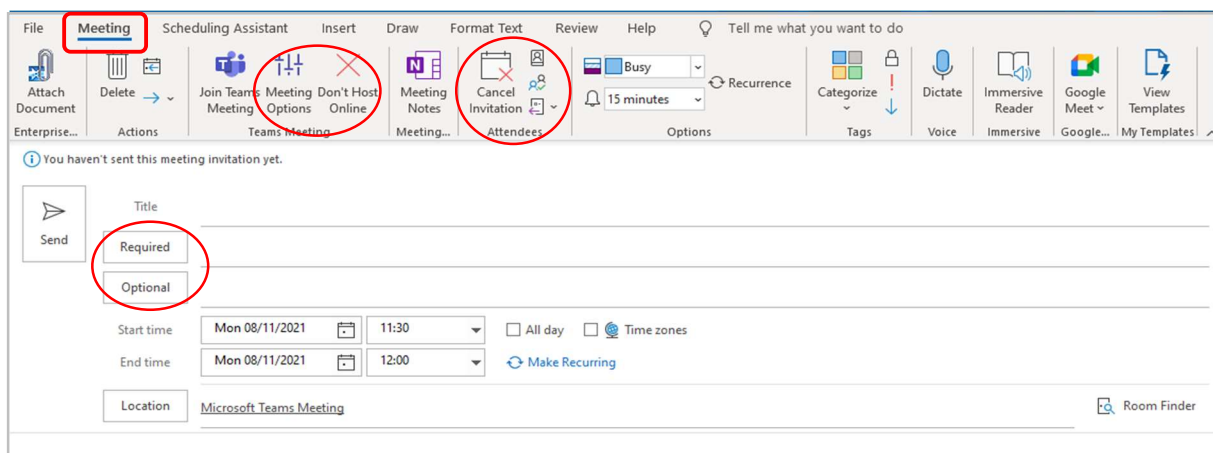
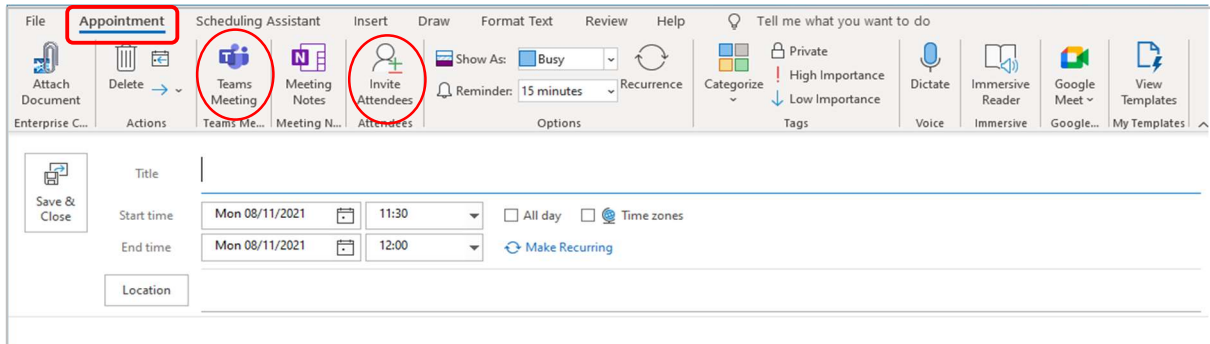


Please see the separate Outlook Calendar guide for full details on Appointments and Meetings.

Please see various Teams guides on Inside Barnardo's for full guidance to setting up Teams meetings.

If you choose Appointment or Meeting you will get a similar set-up box, except the Appointment option will not have commands relevant to a meeting, such as the 'To' fields, Meeting Options, Cancel Invitation.

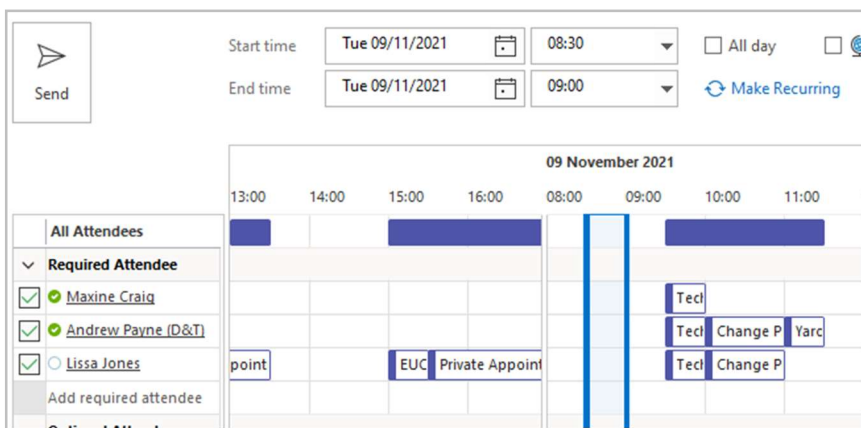
You can turn an Appointment into a Meeting by using the 'Invite Attendees' and/or Teams Meetings commands.



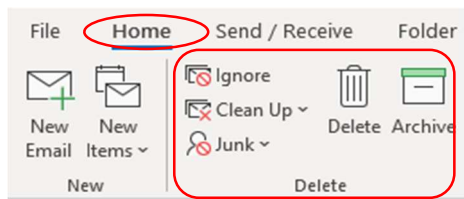
Scheduling Assistant

For both appointments and meetings, Scheduling Assistant can help you see who is free for your proposed time/date.

When you input your invitees names, the system can tell if they are free or busy for your meeting, showing a blue bar. To find a convenient free time, just move the bar to fall into a gap in everyone's 'row'.



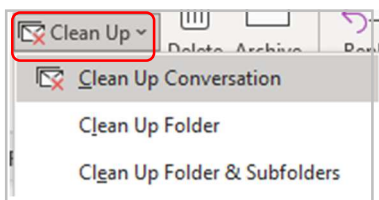
'Delete' group



Apart from Clean Up, the Delete group is mainly self-explanatory. Just bear in mind that if you click onto Delete or Archive, your marked email will be moved straightaway – there is no ‘are you sure’ message. However, if you do move anything accidentally, it is easy to get back – just find it in the Delete/Archive folder and drag it back into Inbox.

Clean-Up

One useful feature in this Delete group is the Clean-Up command. The Conversation Clean Up feature in Outlook can reduce the number of messages in your mail folders. Redundant messages throughout a conversation are moved to the **Deleted Items** folder.



A ‘conversation’ is also known as an email trail or thread and is the complete set of email messages from the first message and all following responses. The messages of a Conversation have the same subject.

Clean Up evaluates the contents of each message in each Conversation. If a message is completely included within one of the replies, the previous message is deleted.

With ‘clean up folder’, all conversations in the selected folder are reviewed and redundant messages are deleted. If you choose ‘Clean Up Folder & Subfolders’, the same happens to all conversations in the selected folder and any folder that it contains. Or you can do ‘Clean up Conversation’ when you are clicked onto an email in a particular trail.

You don't have to worry about lost details because Outlook looks at the content of emails and deletes earlier messages that have duplicate content but **will not delete messages with attachments**.

For full details and guidance on the Clean-up tool, please see the specific guide on Inside Barnardo's.

<https://inside.barnardos.org.uk/outlook-training-and-guidance>

'Respond' group

Again, the Respond group is quite self-explanatory.



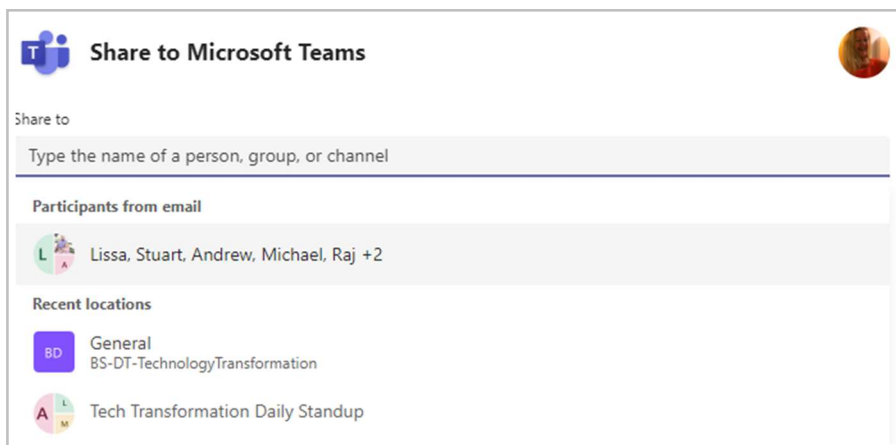
Your Reply, Reply All and Forward options are all also found on your opened email in the top right corner.

In this Respond group, you can also:

- Reply with a meeting
- Reply with an IM (instant message)
- Choose 'more respond actions' which include forwarding it as an attachment and calling the sender.

'Teams' group

Choosing this command allows you to share the email straight into a Teams chat or channel. When you click onto it, a box appears for you to choose where on Teams you want to share it.



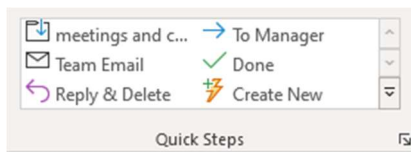
Either fill in the 'share to' field or choose the 'participants from email' or choose a recent team name you have accessed.

Then click Share and the email will appear to those people or in the channel/chat you nominated.



'Quick Steps' group

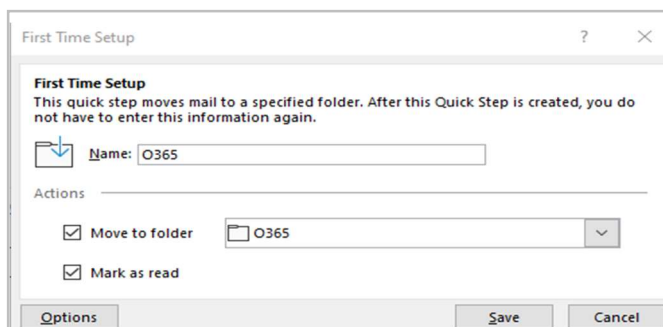
This group gives you some commands that help you perform some actions quickly using the drop-down arrow or the small arrow in the bottom right.



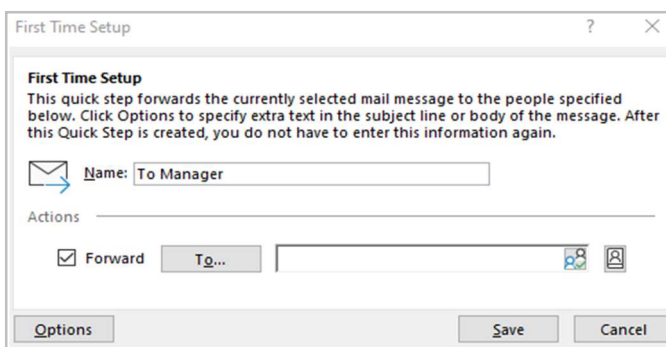
Actions are:

- Move to a set folder - moves email to a selected folder and marks it as Read.
- Send email to Manager - forwards the selected email to your manager.
- Team email – creates a new email to your team.
- Done – marks it as complete, moves it to a chosen folder and marks it as Read.
- Reply and delete – replies to the sender and deletes the email in one go.
- Create new – you can create your own quick step.

Move to a set folder: there is a first-time setup box for you to set your controls. You will not have to do this again.

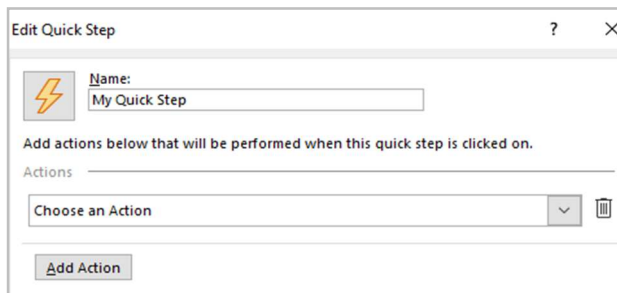


To Manager: there is a first-time setup box for you to nominate your manager. You will not have to do this again.

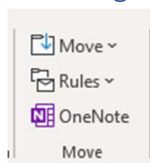


Team email: similar to the To Manager option, you will have a first-time setup box to nominate who is in your team.

Create New: this opens a box for you to name the quick step and choose an action. The choices fall under filing, change status, categories, tasks and flags, responding, appointment, and conversations.



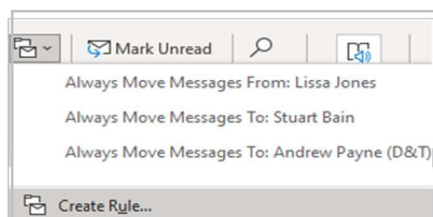
'Move' group



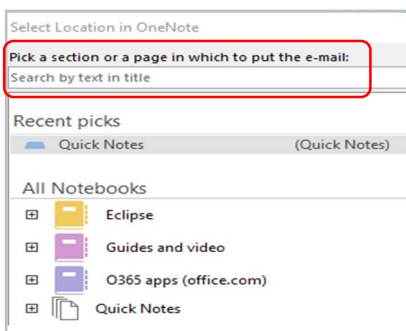
This group lets you move emails manually into other folders or set rules to do so automatically.

The main drop-down under 'Move' displays your current folders in Outlook for you to select where to move your email.

The 'Rules' icon allows you to set a rule to always move emails from or to certain people.



The 'OneNote' command send the message into OneNote. Click onto this and you get a box in which to choose which Notebook to put it. Choose a page or section of a notebook and click ok.



The text of your email will then be put into the notebook page you allocated. *Note – it puts the entire email trail into your OneNote.*

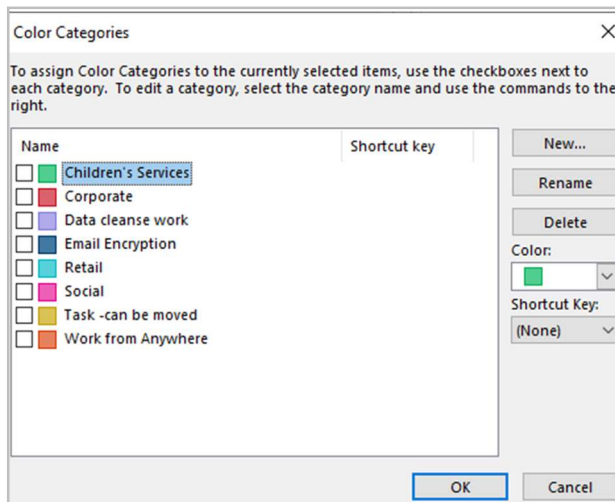
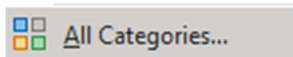
'Tags' group



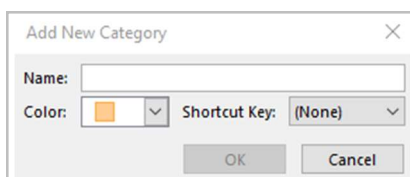
If you click on 'unread/read', the email you are clicked on will switch to unread or read, depending on what it is currently on.

Categorise:

Categorising is a great way of organising your emails. You can categorise your emails and calendar to help you organise and track messages and events related to a project, task or a person. Create new categories and give them names and colours.



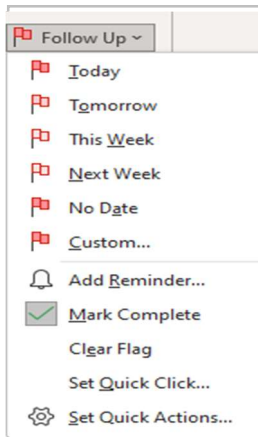
Click onto 'New' to add a new category and colour.



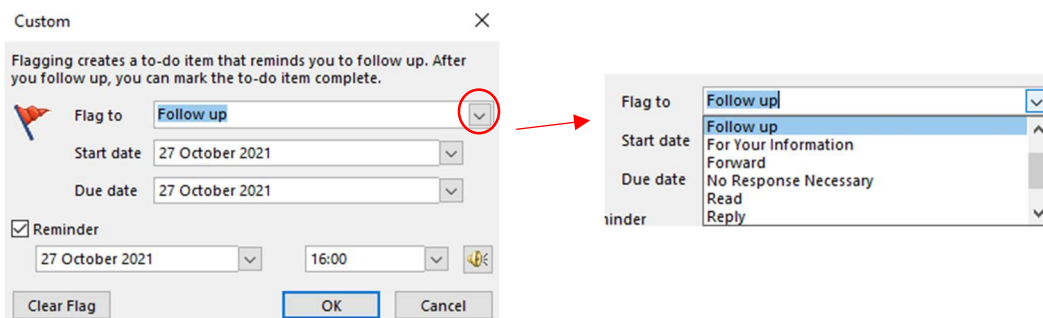
Use the 'Rename' button to give your colour a new name.

Follow-up

Use this to set flags to remind you of an email that has something in it to complete, or that you want to get back to later.

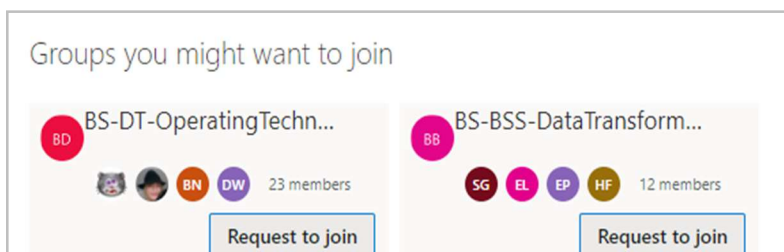


You can also set a reminder that comes up like a calendar reminder and can also set an accompanying sound alert. You can flag for follow-up, forwarding, read, or reply.

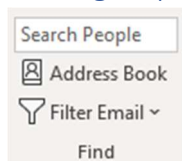


'Groups' group

This gives your team space for conversations, shared files and scheduling events, etc. the suggestions are based on people you work and communicate with most often. However, it is relevant to teams set up on Microsoft Teams, which Barnardo's does not fully use yet.

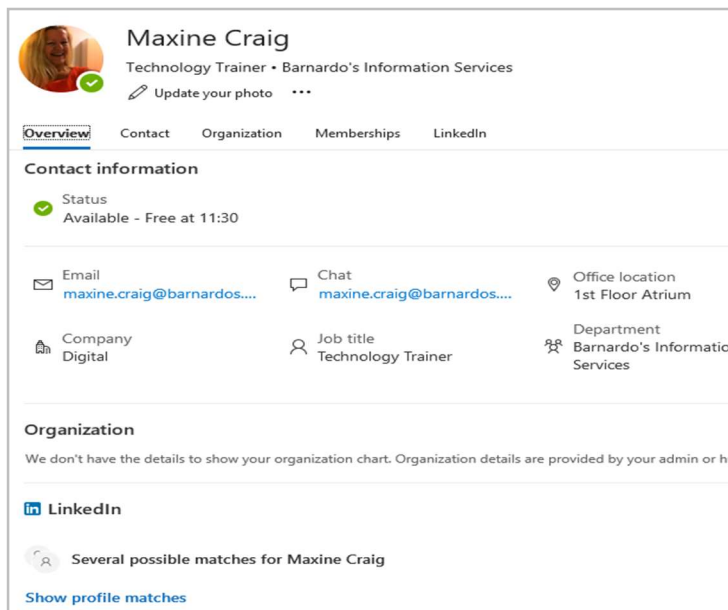


'Find' group



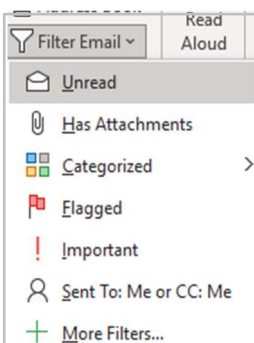
This group allows you to perform a few searches.

Putting a name in the 'search for people' box brings up the person's details such as job title, email address, department and LinkedIn profile link. It gives their current availability status too so you know when you can start a chat or video call.



Address Book: opens the global list for you to search for someone's email address.

Filter email: filters your emails to show certain groups, such as flagged, unread, with attachments, etc.

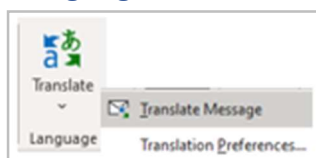


‘Speech’

The Read Aloud feature is found across Office 365. Clicking onto this command brings up a small toolbar with controls to start, pause, rewind and forward. In the settings, you can change the voice and reading speed.



‘Language’



Using this group, you can translate messages into or from another language or have your non-English email proofed in another language.

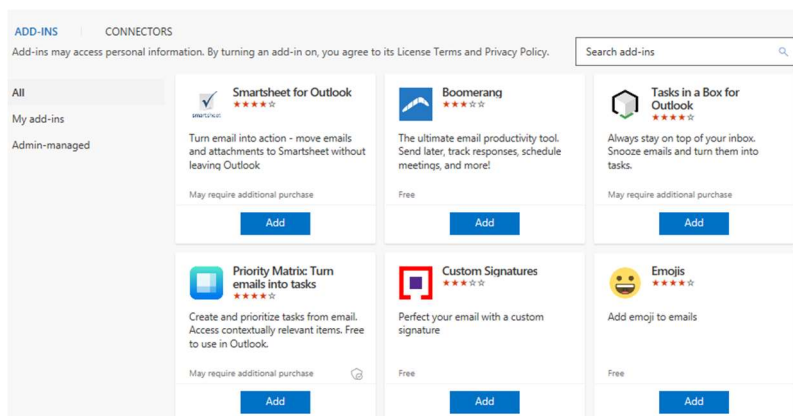
For further details of how to use this function, please see the comprehensive Microsoft Translation Tools user guide on Inside Barnardo’s.

<https://inside.barnardos.org.uk/microsoft-365-translation-tools>

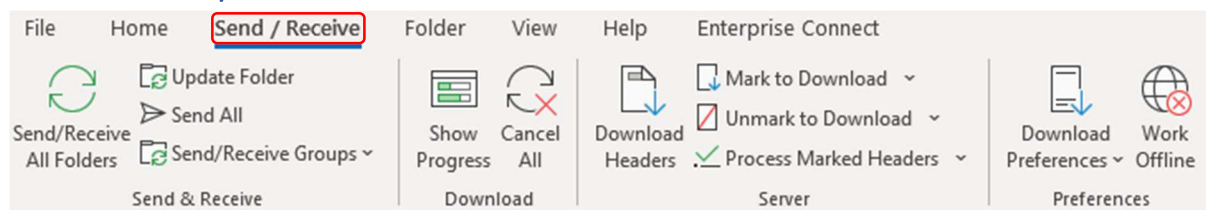
‘Add-Ins’

Here you can browse and find ‘add-ins’ to load onto your Outlook if you need any of them.

Add-ins are installed features that run inside of other programs to increase or enhance the functionality. Outlook add-ins are often called plug-ins or extensions. Enterprise Connect is an example of an Outlook add-in.



Email - Send/Receive tab



Automatic checks for new incoming and outgoing messages occur at several possible times, such as when you start Outlook and at automatic intervals as defined in Send/Receive Groups. By default, when your computer is online, email messages are sent automatically when you click Send.

At any time, you can override the automatic send/receive intervals to immediately send and receive messages.

Send and receive messages for all accounts

1. Click Send / Receive.
2. In the Send & Receive group, click Send/Receive All Folders.

To send all messages in the Outbox, but skip checking for new messages, use the Send All command instead.

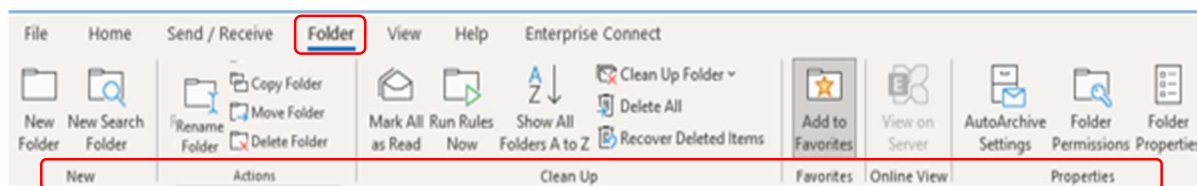
Manually send and receive messages for one account only

1. Click Send / Receive.
2. In the Send & Receive group, click Send/Receive Groups, point to the account for which you want to send/receive, and then click Inbox.

Send/Receive groups.

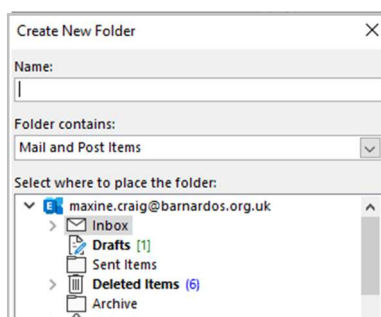
Send and receive items in a particular send/receive group. These groups have different behaviours such as the frequency at which Outlook connects to the server. The drop-down contains the commands: All Accounts Group, Application Folders Group, Inbox, Define Send/Receive Groups, Disable Scheduled Send/Receive.

Email – Folder tab



This tab is to do with your Outlook folders – Inbox, Sent, Drafts, Deleted and any you have set up manually.

New Folder - create a new folder in the Navigation Pane.



'Actions' group

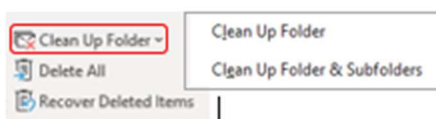
Rename Folder - rename any selected folder.

Copy Folder and Move Folder - copy or move the selected folder to a new location.

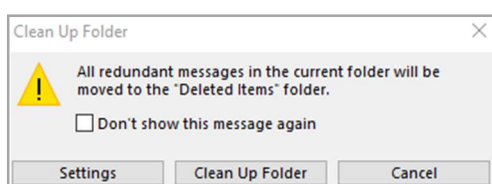
'Clean-up' group

Run Rules Now – apply all rules to the items currently in your mailbox.

Clean-up folder - all conversations in the selected folder are reviewed, and redundant messages are deleted. If you use the drop-down arrow and choose 'Clean Up Folder & Subfolders', the same happens to all conversations in the selected folder and any folder that it contains.



Before the system moved the redundant messages, you do get a message box asking if you want to go ahead or cancel.



(for full guidance on Clean-Up, please see the dedicated guide on Inside Barnardos Outlook training and guidance page)

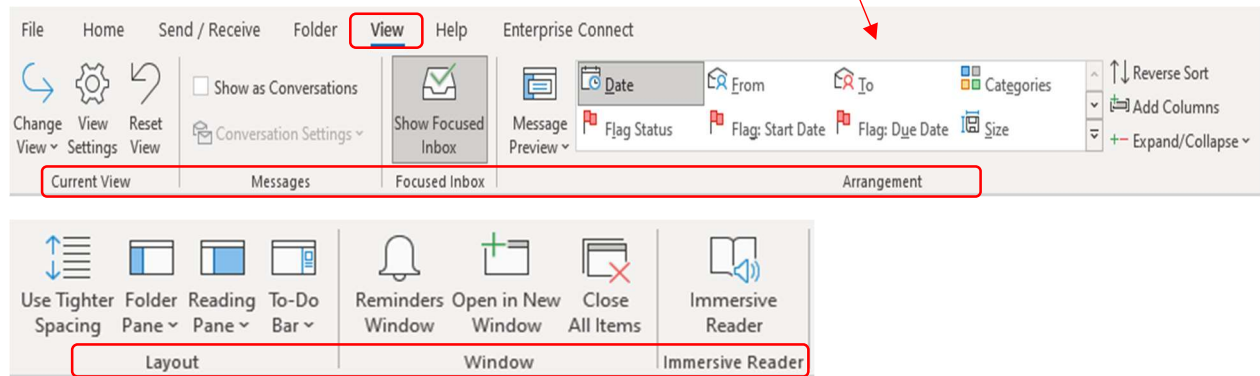
Properties group

Folder Permissions - view and edit the sharing permissions for this folder.

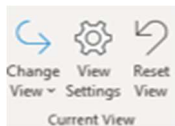
Folder Properties - view the properties for this folder.

Email – View tab

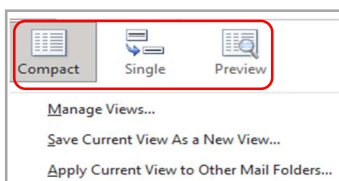
The View group has some useful tools for customising how your inbox displays, such as focused inbox, folder pane, reading pane, To Do bar, and gallery



'Current view' group



Change view: use this to switch to a different view type. Choose compact or single to keep a reading pane, or preview without one.



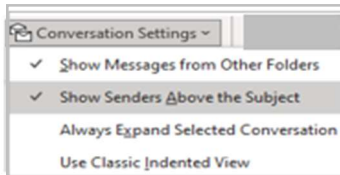
View Settings: allows you to customise the current view using the Advanced View Settings box, including adding and removing field columns (e.g. importance, size, from, subject..), grouping, sorting, filtering and formatting.

Reset View: Reset all current view settings to the default settings for this folder. If you click onto this, you get an 'are you sure?' message first.

'Messages' group

Show as conversations: allows you to arrange your emails by conversation, which is your default. This means that within each conversation, messages are sorted with the newest on top.

If you have this box ticked, the **Conversation Settings** drop-down becomes available, which allows you to change the way conversations are displayed in your list of emails.



- Show messages from other folders - use this option to display messages in the conversation that have been moved to other folders, as well as messages you've sent that are stored in your Sent Items folder.
- Show senders above the subject - this option shows the sender names at the top of the conversation rather than the conversation subject.
- Always expand selected conversation - this applies only to the currently selected conversation, which will always appear expanded if you tick this box.
- Use classic indented view - classic indented view shows messages in the conversation indented based on their position within the conversation.

'Focused inbox' group

Focused Inbox separates your inbox into two tabs—Focused and Other. Your most important email messages are on the Focused tab while the rest remain easily accessible but out of the way on the Other tab.

Click onto 'Focused inbox' command and the Focused and Other tabs will appear at the top of your mailbox. You'll be informed about email flowing to Other, and you can switch between tabs any time to take a quick look.

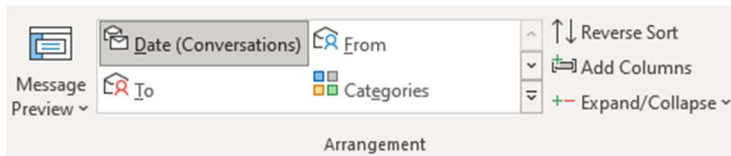
At Barnardo's, the Others tend to be emails from Workplace or other systems. However, you can change how your messages are organised between the two tabs.

1. From your inbox, select the Focused or Other tab, and then right-click the message you want to move.
2. If you're moving from Focused to Other, select 'Move to Other' if you want only the selected message moved. Select 'Always Move to Other' if you want all future messages from the sender to be delivered to the Other tab.
3. If you're moving from Other to Focused, select 'Move to Focused' if you want only the selected message moved. Select 'Always Move to Focused' if you want all future messages from the sender to be delivered to the Focused tab.



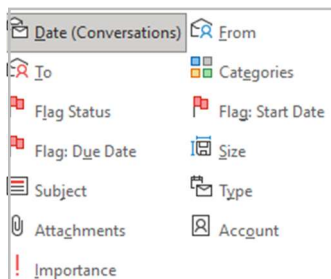
'Arrangement' group

In this group, you can change the arrangement of how your messages display, such your message preview, how messages are sorted, columns



Message preview - alongside the sender name and subject, you can set your emails to display none of the conversation or 1, 2 or 3 lines.

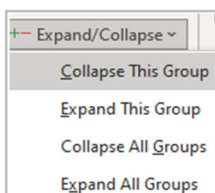
Gallery – in this middle part, you can choose how your messages are sorted. Default is by date (conversation), but you can reset to any of the following: from, to, categories, flags, subject, size, type and attachments.



Reverse sort – just flips the order of whatever view you are using; for example, on Date sorting, it displays oldest to newest instead of newest at top.

Add Columns - choose which fields are shown in the view. (Note that this produces the same options as the Column option in View Settings.)

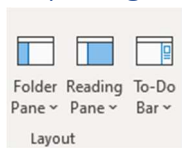
Expand / Collapse - expand or collapse groups in the list.



For example, if you are on Date view and choose 'collapse this group', all of that day's emails will collapse and display as 'today', etc.



'Layout' group

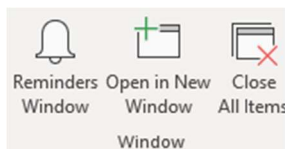


Folder Pane – the folder pane is the one on the left of your inbox that shows all your folders. Use this command to show, hide or minimise the folder pane and show or hide favourites.

Reading Pane – the reading pane is the one that shows an email in full when you click on it. Use this command to either hide or show the reading pane on the right or along the bottom.

To-Do Bar – the To do bar is a little area to the right of the reading pane that can display your calendar, tasks or search people, depending on what you have ticked. Or it can be Off so it does not show at all.

Window



Reminders Window - displays the 'Reminders' dialogue box for you to see what meetings you have coming up today.

Open in New Window – simply opens whichever folder you are in into a new window, which can be useful if you want to easily monitor and view two or more different Outlook folders.

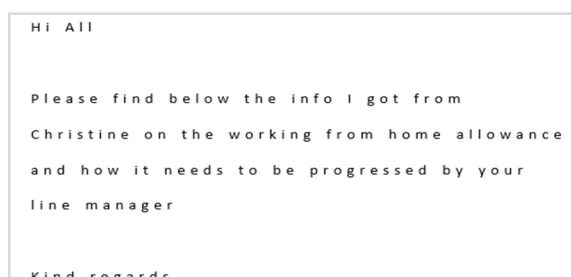
Close All Items - in tandem with 'open in new window' this command just closes the extra windows but leaves your inbox open.

Immersive Reader

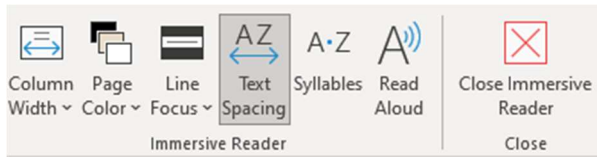


You can use Immersive reader to help with your reading skills. Switching to it gives you the ability to change how text is displayed or even have it read out to you.

When you click into Immersive Reader, your email will switch to IR mode.



Along the top you have options to adapt how Immersive Reader works for you by changing colour, text spacing, column width, line focus and syllable break-up.



Column Width lets you choose between very narrow, narrow, moderate and wide.

Page Colour gives you a variety of colours to display in.

Line Focus lets you choose between no line focus or one line, three lines or five lines being focused on.

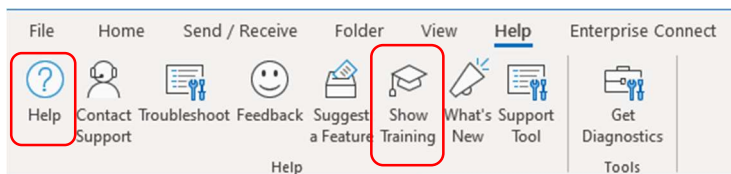
Text Spacing allows you to adjust the spacing of the words.

Syllables: divides words by showing small dots between the syllables.

Read Aloud lets you listen to the text being read and with the settings icon you can change the voice or reading speed.

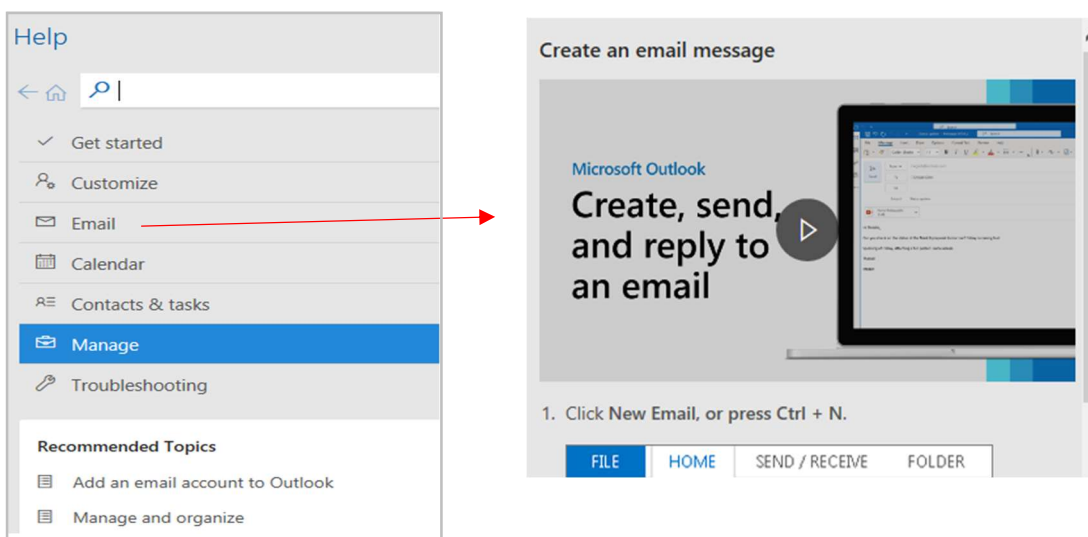
Email – Help tab

The Help tab is where you can find Microsoft support and training for Outlook.



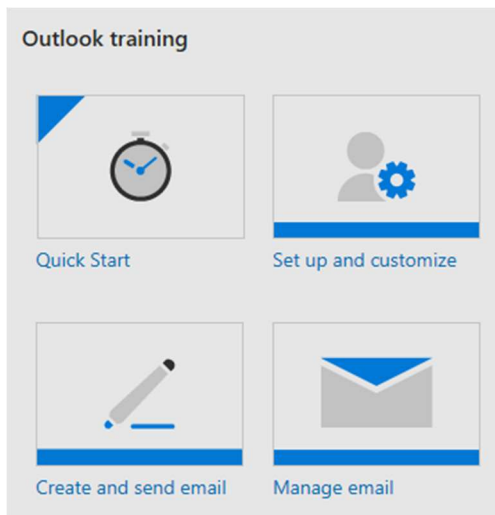
Help?

This opens a pane to the right where you can click on any of the subjects to learn more through instructions and videos . e.g. with Emails below.



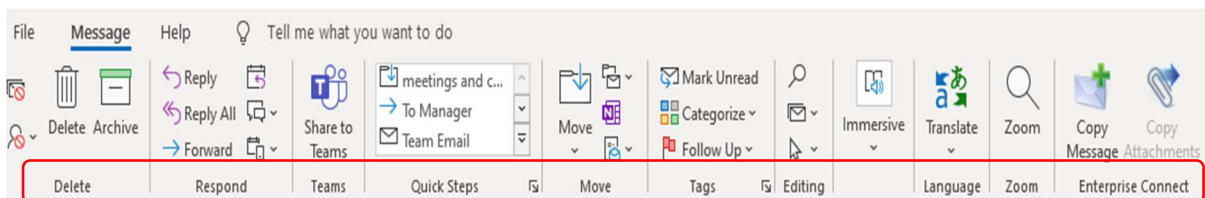
Show training

This opens a pane to the right that gives you access to Microsoft Outlook training pages and videos, e.g. organising your inbox, contacts and tasks, calendar.



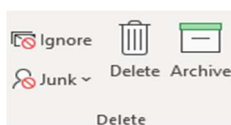
Receiving your Emails

Once you click on and open an email you have received, you will get a list of commands under the Message tab along the top of the opened email.

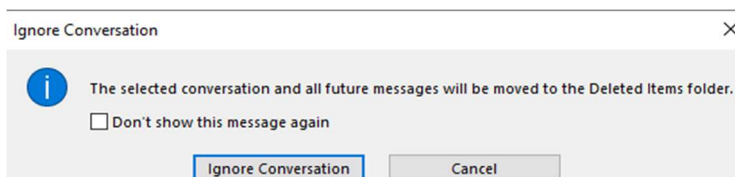


'Delete' group

This group includes commands of delete, archive, ignore conversation and block sender.



The small icon called 'ignore' is the 'ignore conversation' command. Setting this will move all future messages related to this conversation into the Deleted folder.



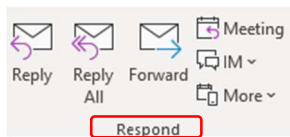
The icon under it called 'Junk' is to block the sender or treat the message as junk mail.

Delete and Archive:

Choosing one of these will immediately move the email into the Delete or Archive folder; it does not ask 'are you sure'. If you move an email by accident, don't panic- just go into the 'delete' or 'archive' folder, find the email you moved in error, and drag it back into the inbox.

For Archive, there is actually no difference in the retention period of emails either within the Archive folder or Inbox (including subfolders); there is a default 2yr retention period across all emails in a user's mailbox.

'Respond' group



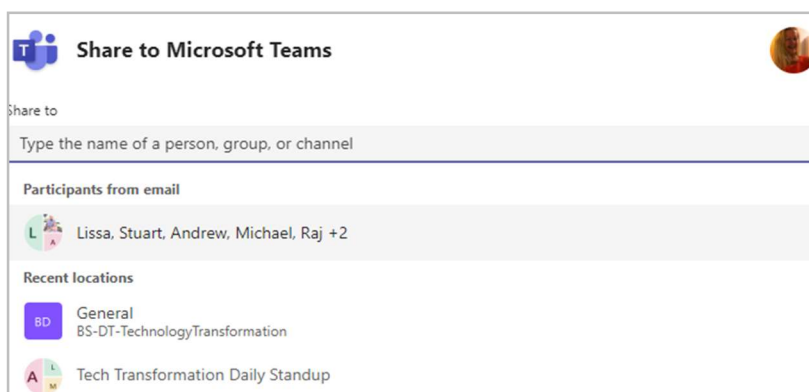
Your Reply, Reply All and Forward options are all also found on your opened email in the top right corner.

In this Respond group, you can also reply with a meeting or reply with an IM (instant message).

Choose 'more respond actions' which include forwarding it as an attachment and calling the sender.

'Share to Teams'

Choosing this command allows you to share the email straight into a Teams chat or channel. When you click onto it, a box appears for you to choose where on Teams you want to share it.



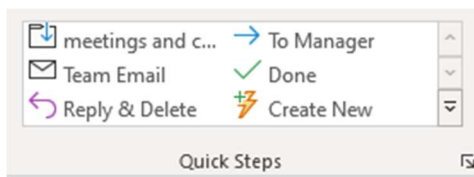
Either fill in the 'share to' field or choose the 'participants from email' or choose a recent team name you have accessed.

Then click Share and the email will appear to those people or in the channel/chat you nominated.



'Quick Steps' group

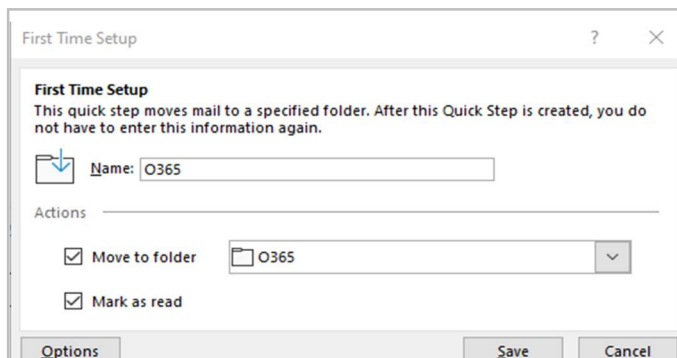
This grouping gives you some commands that help you perform some actions quickly using the drop-down arrow or the small arrow in the bottom right.



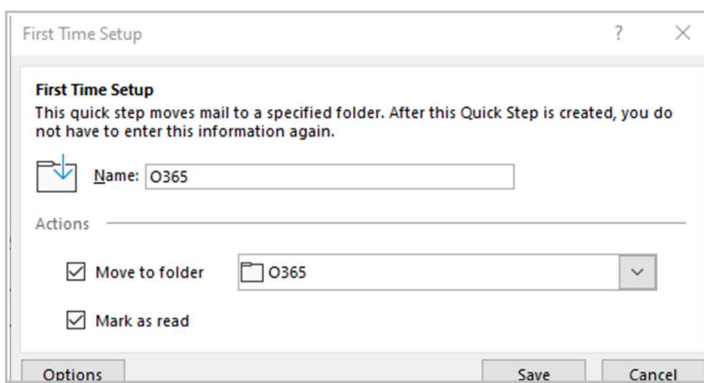
Actions are:

- Move to a set folder - moves email to a selected folder after marking it as Read.
- Send email to Manager - forwards the selected email to your manager.
- Team email – creates a new email to your team.
- Done – marks it as complete, moves it to a folder and marks it as Read.
- Reply and delete – replies to the sender and delete the email in one go.
- Create new – you can create your own quick step.

Move to a set folder: there is a first-time setup box for you to set your controls. You will not have to do this again.

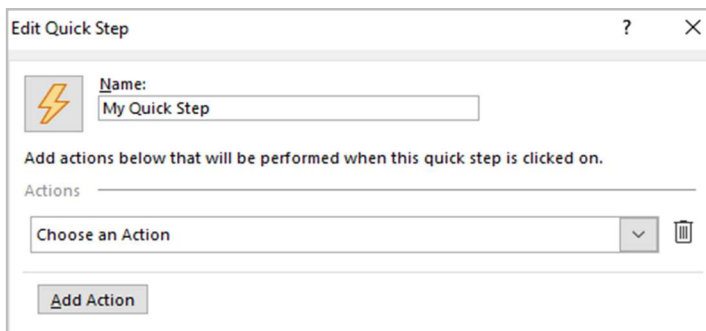


To Manager: there is a first-time setup box for you to nominate your manager. You will not have to do this again.

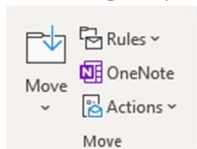


Team email: again, you will have a first-time setup box to nominate who is in your team.

Create New: this opens a box for you to name the quick step and choose an action. The choices fall under filing, change status, categories, tasks and flags, responding, appointment, and conversations.



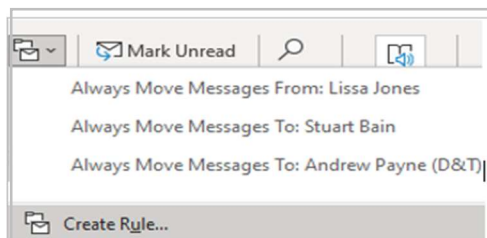
'Move' group



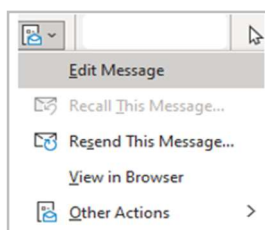
This grouping lets you move emails manually into other folders or set rules to do so automatically.

The main drop-down under Move displays your current folders in Outlook for you to select where to move your email.

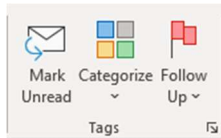
Rules allows you to set a rule to always move emails from or to certain people.



Actions includes edit message and resend message.

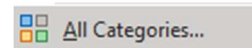
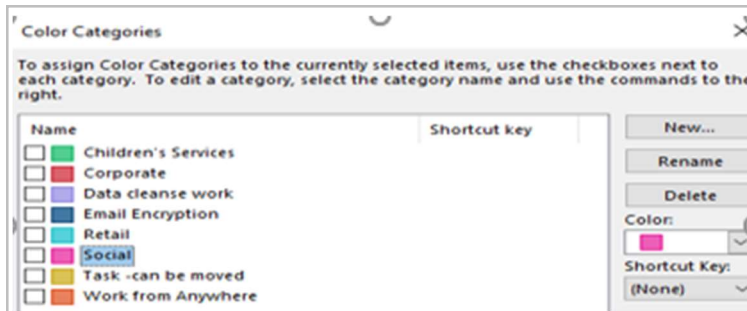


'Tags' group

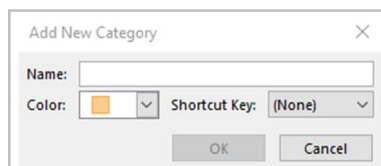


Categorise:

Categorising is a great way of organising your emails. You can categorise your emails and calendar to help you organise and track messages and events related to a project, task or a person. Create new categories and give them names and colours.

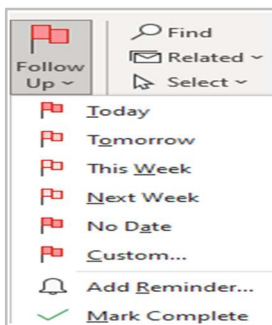


Click onto New to add a new category and colour. Use the 'rename' button to give your colour a new name.

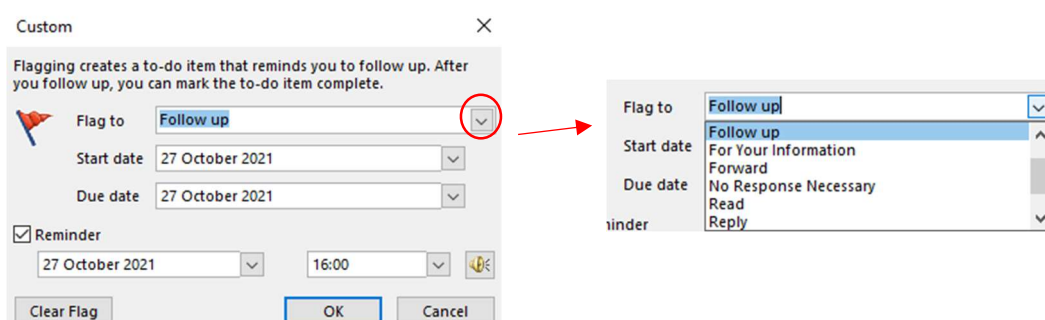


Follow-up

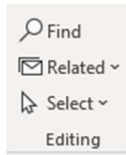
Use this to set flags to remind you of an email that has something in it to complete. Or that you want to get back to later.



You can also set a reminder that comes up like a calendar reminder and can also set an accompanying sound alert. You can flag for follow-up, forwarding, read, or reply.



'Editing' group



This is where you can use 'Find' to search for a word in an email trail, use Related to find all messages within the same conversation or from that sender, or use Select to highlight and select everything within the email trail.

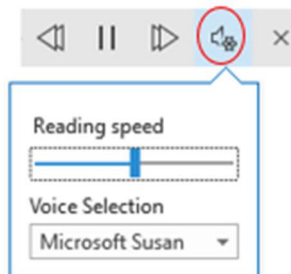
'Immersive' group



Use this group to have your email read aloud to you or to access the email in Immersive Reader.

Read Aloud

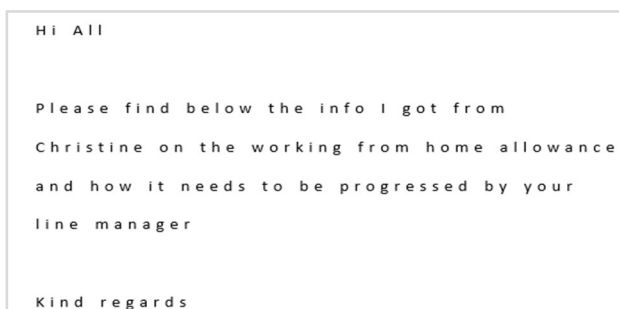
The Read Aloud feature is found across Office 365. Clicking onto this command brings up a small toolbar for your controls to start, pause, rewind and forward. In the settings, you can change the voice and reading speed.



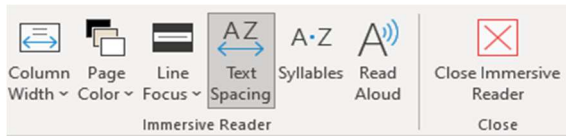
Immersive Reader

You can use Immersive reader to help with your reading skills. Switching to it gives you the ability to change how text is displayed or even have it read out to you.

When you click into Immersive Reader, your email will switch to IR mode.



Along the top you have options to adapt how Immersive Reader works for you by changing colour, text spacing, column width, line focus and syllable break-up.



Column Width lets you choose between very narrow, narrow, moderate and wide.

Page Colour gives you a variety of colours to display in.

Line Focus lets you choose between no line focus or one line, three lines or five lines being focused on.

Text Spacing allows you to adjust the spacing of the words.

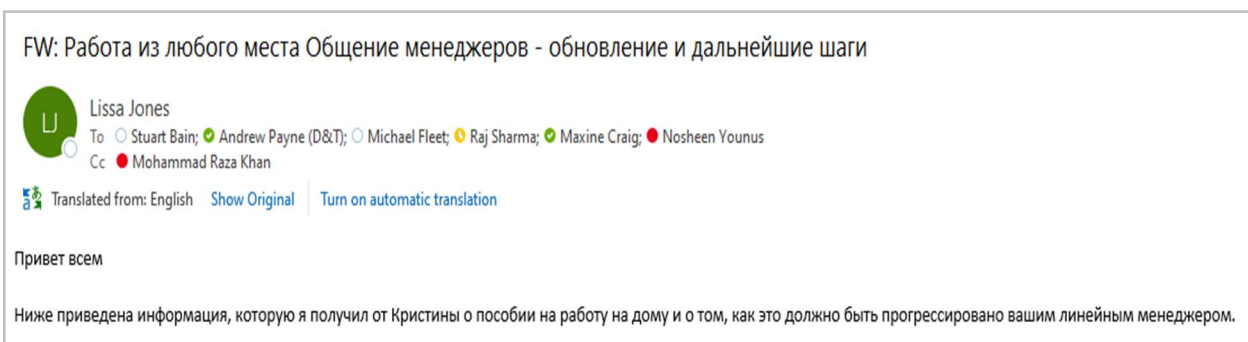
Syllables: divides words by showing small dots between the syllables.

Read Aloud lets you listen to the text being read and with the settings icon you can change the voice or reading speed.

'Language'



Translate message - translates this message into another language. Choosing this will convert your received email into whatever language you have chosen in your translation preferences.



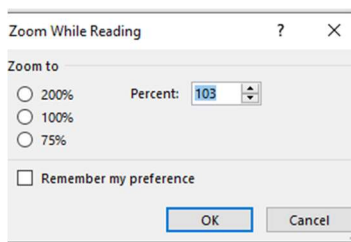
Translation preferences - this allows you to set a proofing language other than English or choose language preferences.

For further details of how to use this function, please see the comprehensive Microsoft Translation Tools user guide on Inside Barnardo's.

<https://inside.barnardos.org.uk/microsoft-365-translation-tools>

'Zoom'

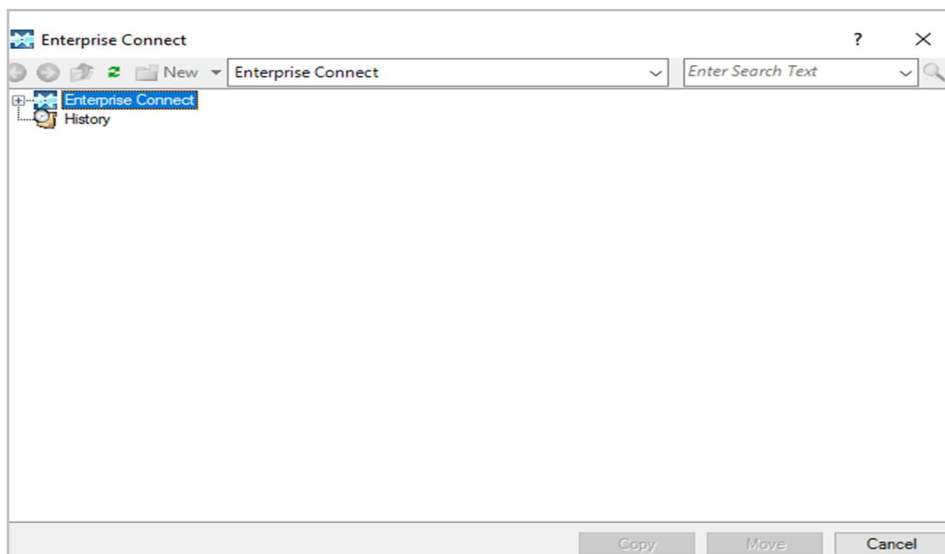
Zoom allows you to set your own zoom percentage and tick the 'remember my preference' box.



'Enterprise Connect' group



This group lets you copy messages or attachments into Enterprise Connect. Click on 'copy message' and a box will open for you to choose where you want to put the email copy.



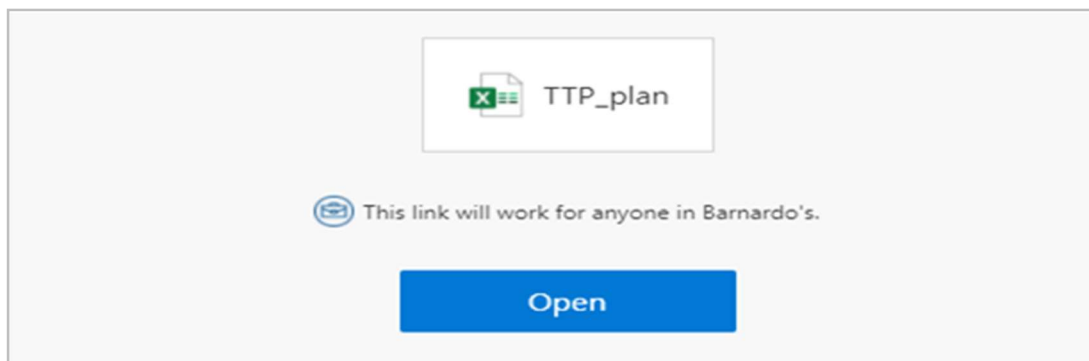
Receiving an email with a shared document

If a document is shared with you, you can see it a couple of ways depending on the method the sharer has used.

Shared as an attachment link

You get an email that says who has shared what file with you. You can either click on the actual document icon or the 'open' button to access the document.

Just remember, this takes you to the live document, not a copy. That is fine if your colleague has shared it for you to collaborate!



Please don't be nervous about opening and potentially working on someone else's live document. OneDrive has Version History built in, so if you accidentally type over something, you or your colleague can revert to a previous version (see [OneDrive Guide](#) for further information).

When you open this, the sender will be informed by email that you have done so. If you make changes, the sender gets told this and can go into the document to look at your comments or changes.

By link in the email body

Some people prefer to share access to their document via a link that is within the email text, instead of as a shared document attachment. If this is the case, just click onto the link and you will be taken to the live document.

