



Module 17: How to use Microsoft Outlook

- What Microsoft Outlook is
- What Microsoft Outlook can do
- How it can help you in the workplace
- Simple tricks on how to get the most out of Microsoft Outlook

In this module, you will learn:

- What Microsoft Outlook is and how it supports modern workplace communication
- What Outlook can do across email, calendar, contacts, tasks, rules and reminders
- How Outlook can help you organise work, reduce repetitive tasks and collaborate with colleagues
- Simple, current tips for getting more from Outlook in Microsoft 365

17.1 Introduction



Microsoft Outlook is a communication and organisation tool used for email, calendars, contacts, tasks and reminders.

In many workplaces, Outlook is used as part of Microsoft 365. This means it can connect with cloud-based mailboxes, shared calendars, Teams meetings, contacts, Microsoft To Do and other Microsoft services. Outlook is available in several versions, including Outlook on the web, New Outlook for Windows, classic Outlook for Windows, Outlook for Mac and mobile apps.

Because the layout and available features can vary slightly by version, this module focuses on the current Microsoft 365 experience and highlights where classic Outlook may differ.

17.2 Getting Started with Outlook



Outlook is designed to help you manage messages, appointments and work priorities in one place.

When you open Outlook, the main view is usually Mail. You will normally see a folder list or navigation pane, a message list and a reading pane. In New Outlook and Outlook on the web, settings are usually found through the **Settings** gear icon. In classic Outlook, many settings are found through **File > Options**.

Tip: To check whether you are using New Outlook or classic Outlook for Windows, look for the Settings gear in the top-right corner. Microsoft states that New Outlook shows this Settings button, while classic Outlook does not.

Outlook still uses a ribbon or command bar for common actions such as replying, forwarding, deleting, moving, categorising, flagging and creating rules. The exact commands shown will change depending on whether you are reading mail, creating a message, viewing your calendar or managing contacts.

You can save space by changing the layout of the folder pane and reading pane. In New Outlook, layout settings are usually found under **Settings > Mail > Layout**. In classic Outlook, similar options are commonly found under the **View** tab.

If you work with several areas of Outlook during the day, you can open items such as messages, calendar appointments or tasks in separate windows. In current Outlook keyboard guidance, **Shift + Enter** opens a selected message in a new window.

17.3 Moving Between Outlook Areas

Outlook is organised around key work areas such as Mail, Calendar, People/Contacts and To Do or Tasks.

The navigation icons are usually shown at the side or bottom of the Outlook window, depending on the version and screen size. Common areas include:

- **Mail:** read, write, organise and search emails.
- **Calendar:** manage appointments, meetings, reminders and shared calendars.
- **People/Contacts:** store and search contact information.
- **To Do/Tasks:** manage tasks and flagged email follow-ups.

Send and receive mail

Most Microsoft 365 accounts sync automatically, so you do not usually need to manually send and receive mail. In classic Outlook, the **Send/Receive** tab is still available. In New Outlook and Outlook on the web, messages normally sync continuously when you are connected to the internet.

Folders, categories and rules

Folders help you file messages by topic, customer, project or priority. Categories add colour labels to messages and calendar items. Rules can automatically move, flag, categorise or forward emails

when they meet conditions you choose.

In classic Outlook, rules can be created from **File > Manage Rules & Alerts > New Rule**. In New Outlook and Outlook on the web, rules are managed from **Settings > Mail > Rules**.

Archiving note: AutoArchive is a classic Outlook feature. Many Microsoft 365 workplaces now use cloud mailboxes and Online Archive instead. Your organisation may also apply retention policies, so check your workplace guidance before deleting or archiving important records.

Message lists

The message list shows key information such as the sender, subject, received time, attachments, categories and flags. You can sort or filter messages to focus on the most important items.

Common ways to organise the message list include sorting by date, sender, subject, category, flag or attachment. In New Outlook, use the message list filter and sort controls. In classic Outlook, many options are available from the **View** tab.

17.4 Scanning Messages Efficiently



When your inbox contains many messages, the reading pane helps you review emails quickly without opening each one in a separate window.

Use the reading pane to scan the sender, subject, message content and attachments. If a message needs action, you can reply, flag it, categorise it, move it to a folder or create a task. If it does not need action, you can archive or delete it.

Modern Outlook also includes features such as search, filters, categories, pins, flags, snooze and

focused inbox options, depending on the version and account type.

17.5 View and Layout Options



View and layout settings help you make Outlook easier to read and more suitable for the way you work.

You can adjust the folder pane, message list density, reading pane position, conversation view and calendar layout. In New Outlook and Outlook on the web, start with **Settings > Mail > Layout**. In classic Outlook, use the **View** tab.

Reminders appear when Outlook needs to alert you about meetings or tasks. You can usually dismiss, snooze or open reminders depending on the type of item and your Outlook version.

17.6 Managing External Images in Email



Most modern emails use HTML formatting, which may include external images, logos and tracking pixels.

Today, blocking external images is less about speeding up downloads and more about protecting

privacy and security. External images can sometimes tell the sender that a message has been opened, and malicious or suspicious messages may use remote content in unwanted ways.

In classic Outlook, you can manage this from **File > Options > Trust Center > Trust Center Settings > Automatic Download**. The option is usually called **Don't download pictures automatically in HTML e-mail messages or RSS items**.

In New Outlook and Outlook on the web, look under **Settings** for privacy or external image settings. The exact wording may vary, but the aim is to control whether Outlook automatically downloads external images or asks first.

If images are blocked, Outlook may show a message banner or image placeholder. You can choose to download pictures for a specific message or trust a sender when appropriate.

17.7 Using the Ribbon and Command Bar



The ribbon or command bar changes depending on what you are doing.

When reading mail, you will usually see commands for reply, reply all, forward, delete, archive, move, categorise, flag and rules. When writing a message, you will see options for formatting, attachments, signatures, importance, Bcc, spelling and scheduling send.

In classic Outlook, tabs such as **Message**, **Insert**, **Format Text**, **Options** and **Review** are common when composing an email. In New Outlook, the same types of tools are available, but they may appear in a simplified command bar.

Use **Bcc** when recipients should not see each other's email addresses. Use delivery and read receipts carefully, because some recipients or organisations disable them.

17.8 Managing Tasks and Follow-Ups



Modern Outlook task management is closely linked with Microsoft To Do.

The older term **TaskPad** is not commonly used in current Outlook training. In Microsoft 365, flagged emails can appear in Microsoft To Do when you use the same Microsoft account. This helps you manage follow-ups alongside other tasks.

To manage work effectively, flag messages that need action, add due dates where available, use categories for projects or priorities, and review your task list regularly. Depending on your organisation, you may also use Microsoft Planner or Teams for shared team tasks.

Did you know? Flagging an email is useful when a message needs follow-up, but it is not the same as completing the work. Review flagged emails daily so they do not become another hidden inbox.

17.9 Changing Appearance and Colour Scheme



You can change Outlook's appearance to make it more comfortable to use.

In New Outlook and Outlook on the web, go to **Settings > General > Appearance** to choose light

mode, dark mode or system settings. In classic Outlook and other Microsoft 365 apps, themes are usually managed from account or Office theme settings.

Dark mode can reduce screen glare in low-light environments. Light mode may be easier to read in bright rooms. Use whichever option helps you work comfortably and accurately.

Activity 1 - Working with Microsoft Outlook

Estimated time: 10-15 minutes

Open Outlook and review your message list. Practise sorting or filtering messages by date, sender, unread status, flagged status or attachments. Then adjust the reading pane or layout settings so the inbox is easier for you to scan.

If you do not have Outlook, compare the same features in another email program and note how it handles folders, labels, rules and calendar integration.

17.10 Other Tips and Tricks for Microsoft Outlook



Outlook includes shortcuts and automation tools that can reduce repetitive work.

Useful current shortcuts include:

- *Ctrl + N = create a new message or calendar event*
- *Ctrl + R = reply to an email*

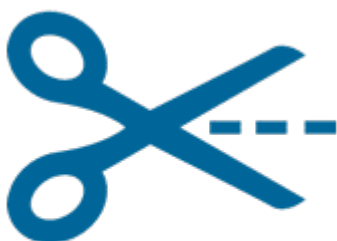
- *Ctrl + Shift + R = reply all*
- *Ctrl + F = forward a message*
- *Ctrl + Enter = send a message*
- *Delete = delete the selected message or item*
- *Ctrl + 2 = go to Calendar*
- *Shift + Enter = open the selected message in a new window*

Quick Steps can automate common actions such as moving a message to a folder, marking it as read, categorising it or forwarding it to a colleague. In New Outlook, Quick Steps can be managed from the Mail ribbon or command bar.

Quick Parts and templates help you reuse text you type often, such as standard replies or instructions. Availability and setup can vary between classic Outlook, New Outlook and Outlook on the web, so check the compose window tools in your version.

Schedule Send lets you write an email now and send it later. In New Outlook and Outlook on the web, scheduled messages are usually managed from the Drafts folder. In classic Outlook, delayed messages may appear in the Outbox until they are sent.

17.11 Email Shortcuts, Notifications and Rules



Outlook can help you focus by controlling notifications and using rules to prioritise important mail.

Rather than receiving an alert for every message, consider using focused inbox, rules, folders, categories and notification settings. For example, you might create rules for senior managers, clients, finance messages or project-specific emails.

In New Outlook and Outlook on the web, rules are managed from **Settings > Mail > Rules**. In classic Outlook, use **File > Manage Rules & Alerts**. You can create rules from templates or build a custom rule using conditions and actions.

Activity 2 - More Practice in Microsoft Outlook

Estimated time: 10-15 minutes

Practise using follow-up tools. Select a message that needs action, flag it, add a category if available, and check whether it appears in your To Do or task view. Then create or review one simple rule that helps you organise incoming mail.

17.12 Flagging Messages, Rules and Templates



Flagging messages is a useful way to mark emails that need follow-up.

In current Outlook versions, the most reliable way to flag a message is to select the flag icon, use the right-click menu or choose a follow-up command from the ribbon/command bar. Older keyboard behaviour such as using the Insert key may not be available or consistent in every version.

You can also use rules to move messages that are not sent directly to you into a separate folder. For example, you can create a rule for messages where your name is not in the To line, then move those

messages to a folder such as **CC or FYI**. This can help you focus first on emails that require direct action.

Email templates are useful for messages you send regularly, such as meeting follow-ups, invoice requests or standard customer responses. In classic Outlook, one method is to create a message and save it as an Outlook Template (.oft). In New Outlook and Outlook on the web, template features may appear as My Templates, saved drafts, signatures or add-ins depending on your organisation's setup.

Assignment

How to use Microsoft Outlook

Time: 30+ minutes

Open Outlook and complete the following tasks:

- Adjust your inbox layout or reading pane.
- Sort or filter messages in the message list.
- Flag one message for follow-up.
- Create or review one rule.
- Schedule a test email to send later, if your account allows this.
- Change your appearance setting to light, dark or system mode.

Write a short reflection explaining which Outlook feature would save you the most time in a workplace role.

Module summary

You have learned how Microsoft Outlook supports email, calendar management, contacts, tasks and workplace organisation. Outlook is no longer only a desktop email program: in many organisations it is part of Microsoft 365 and works with cloud mailboxes, shared calendars, Teams meetings and Microsoft To Do.

You have also learned how to organise messages using folders, categories, rules, flags and filters; how to manage external images for privacy and security; how to use Quick Steps, templates and Schedule Send; and how to adjust Outlook's appearance and layout to suit your working style.
