Microsoft Outlook 2010 – Level 1

3 – Sending email



CORPORATE LEARNING & DEVELOPMENT

SENDING EMAIL

INFocus

Email messages are used in much the same way as letters sent through the post – they are designed to communicate with one or more people.

Like any good letter, an email message needs to be addressed (although a special electronic form of addressing is used here). Email messages also appear with a **subject** so that they can be identified.

Messages can also be marked as important, and have sensitivity levels and settings (such as confidential, private and so on) applied.

In this booklet you will:

- ✓ gain an understanding of email accounts in Outlook
- ✓ gain an understanding of how the **Outlook** mail process works
- ✓ gain an overview of composing an email message
- ✓ gain an overview of the ribbon and header areas in the message window
- ✓ learn how to create a new email message
- ✓ learn how to check the spelling of your email messages
- ✓ learn how to add an attachment to an email message
- ✓ learn how to add importance to email messages
- ✓ learn how to request message receipts
- ✓ learn how to send a message in **Outlook**
- ✓ learn how to create an autosignature for your email messages
- ✓ learn how to use an *AutoSignature*
- ✓ learn how to remove an unwanted AutoSignature
- \checkmark learn how to send a courtesy copy to a recipient
- ✓ learn how to send a blind copy of an email

EMAIL IN OUTLOOK

Outlook mail operations allow you to communicate with users connected to your *computer network* (this is usually people within your business in the same building) or with users external to your business or building connected via the *Internet*.

Email Accounts

When you communicate with other people using email your messages and theirs are controlled on a central computer known as a **mail server**. To have access to that server you must have a **mail account** with that server. A mail account here is not a financial type of account, but rather an account that provides you with permission to access the server. Once the account is set up, you normally gain access to the mail server with a **user name** and a **password**.

Email Accounts and Outlook

Outlook supports both internal and external email accounts.

Internal email accounts are normally associated with a computer on your network that is running **Microsoft Exchange Server** – special software created by Microsoft that allows users to send messages to one another over a network of connected computers. Internal email allows you to communicate with people within your organisation. Internal email requires that the internal computers are connected using a **local area network** (LAN). This type of email account is normally used in the workplace to allow colleagues to communicate with one another.

External email accounts connect to other people using the Internet via telephone lines. An external email account is set up with an **Internet Service Provider** (ISP). Access to the ISP is gained by connecting using a modem through the telephone line (or a dedicated cable line). Most email connections at home are set up with this type of email account.

In most businesses Outlook is set up for both internal and external email. The internal email is used to communicate with work colleagues, while the external email is used to communicate with customers and suppliers. Both of these email account types work through the LAN which can be configured to provide access to the ISP for specific computers.

Outlook Profiles

Setting up Outlook for use on the appropriate mail servers can be a tedious and sometimes frustrating exercise.

Once the setup has been done and the connections have been established, Outlook stores the settings, together with other relevant information, in a *user profile*. If you have upgraded to Outlook 2010, the settings from the previous profile will be carried forward into the new version.

If you are using Outlook for the first time, you will be asked for information such as your account user name, password and the names of the various mail servers. Your system administrator at work or your ISP when connecting at home will be able to provide this information to you.

Once this information has been provided, it is saved in your Outlook profile and should not need to be changed or entered again unless some change is made to the operation of your computer.

Note: It is assumed for the remainder of this booklet that you have at least one valid, and working, email account in Outlook 2010.

HOW OUTLOOK MAIL WORKS

Outlook *Mail* provides you with the facility for sending email to other computer users. These people can be directly connected to your computer via a local area network, or they can be many miles away, accessed either through special communications software or the Internet. In Outlook *Mail*, your email is handled just like the normal mail system.

Trays and Folders

Imagine sitting at your desk with two plastic trays in front of you, one labelled **Out** and the other labelled **In**. As you write a message you address it and place it in the **Out** box. Periodically someone comes along, picks up the contents of the **Out** box and takes them to the post office which then distributes the messages to the appropriate recipients. That same person who picks up your mail also places messages sent to you in your **In** box. You can then open these messages and read them or dispose of them into the bin.

Outlook works in the same way, except that the plastic trays are known as folders – in fact there are several more folders than just In and Out.

In Outlook you *compose* a message and when it is saved it is placed into the *Outbox*. Periodically, Outlook clears the contents of the *Outbox* and sends it to the mail server for delivery to the appropriate recipient. Just so that you have a record of what Outlook has sent, a copy of the message, together with details about when it was sent, is placed into the *Sent Items* folder.

If you are working on a message but you haven't finished it, you can save it as a draft in the *Drafts* folder. You can send it later when you finish it.

When someone sends you a message it is downloaded from the mail server and placed into your **Inbox**. Here you can read it and when finished you may delete it – in which case, it then goes into the **Deleted Items** folder.

Unlike postal mail you have several other options available to you with incoming mail. Outlook allows you to set up rules for handling incoming mail. For example, you can create a rule that tells Outlook to automatically place incoming messages from a specific sender into a special folder.

Outlook also includes a **junk email** filter that evaluates incoming messages and sends those considered to be spam to the **Junk E-mail** folder, where the messages can be deleted without reading.

Folder	Mail Direction	Function	
Inbox	Incoming	Stores messages that have been sent by other users to your account.	
Junk E-mail	Incoming	Captures unsolicited and nuisance emails sent to you – the rules and instructions need to be set up for this before it becomes operational.	
Drafts	Outgoing	Stores messages that you have composed without sending. Messages can be reviewed and sent, or saved as a draft again required. Once sent the message is moved to the Sent Items folder.	
Outbox	Outgoing	Stores messages that you have composed for other users but which have not yet been sent by Outlook Mail to the recipient.	
Sent Items	Outgoing	Stores messages that you have sent to other users.	
Deleted Items	Both	Stores messages that have been deleted from the other folders. Messages here can be restored to other folders or deleted permanently.	

Outlook Mail Folders

COMPOSING AN EMAIL MESSAGE

Most of us learnt how to write letters at school. Email provides us with some new challenges that will need to be learnt. Email, like postal mail, has a recipient, needs to be addressed and can be signed just like a normal letter. However, while there are similarities between email and postal mail, there are also some key differences and jargon to become acquainted with.

When you tell Outlook that you wish to create a new email message, a window will appear with boxes for the information and details that need to be included in the message.

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If you are sending internal email the recipients in the **To** and **Cc** boxes will need to be members of the internal email server that you are logged onto. It is most likely that these people will have addresses that clearly indicate who they are: e.g. *Jane Doe, Bill Kline, Fred Bloggs, Mary Tink*, etc.

If you are sending Internet email then you will need to use the email addresses of the recipients. Email addresses are different to internal email server addresses. They appear with the name of the user and the domain that accesses the server for that user. Typical examples would appear like **bwhite@bigpond.com.uk** or **fbloggs@here.co.uk**. The addresses may also be for departments or areas of a business rather than an individual like **sales@cars.com** or **service@dickson.com**. The @ sign is pronounced **at** when speaking these addresses. For example, **bwhite@bigpond.com.uk** would be read as *bwhite at bigpond dot com dot uk*.

To send a message you will therefore need to:

- create some text this may seem obvious but you can (and sometimes might) send messages without text
- 2. nominate one or more recipients
- 3. provide a subject so that the recipient can quickly work out the gist of your message
- 4. specify the level of importance for the message if required
- 5. add further attachments to the message if required.

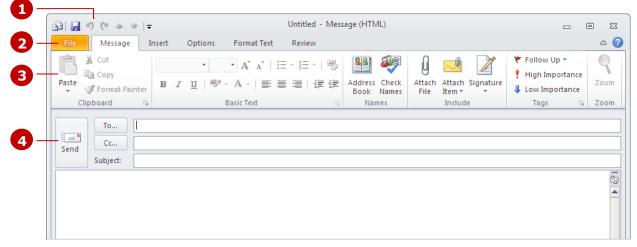
Most of these, with the exception of nominating one or more recipients, are optional. For example, you don't have to include a subject – it's just that this is the right thing to do. Similarly, if you don't specify that this is a message of high importance Outlook will give it an ordinary importance status.

There are also a couple of other subtleties. Unlike normal postal messages, you don't need to worry about putting dates on an email message because the computer does this for you. The date and time when a message arrives in the **Inbox** will be generated by the computer. When you send a message the computer records the date and time when it was sent.

The computer also automatically signals to the recipient that you are the sender. However, it is still considered courteous to sign off an email just the same as if you were sending a postal message.

THE MESSAGE WINDOW

When you are working within a message, you can use the *ribbon* at the top of the message to manage the contents and formatting of your message. You can also use the navigation tools on the *Quick* Access toolbar to move through messages and to perform tasks such as **Save** and **Undo**. The **Backstage** (**File** tab) can also be used to further manage your email messages.



- The Quick Access toolbar (QAT) appears at the top of the mail message window. It contains frequently-used commands so that you can quickly access them at any time. For example, the QAT contains a button to save, undo, redo, find the next item, and find the previous item. Using the Customise Quick Access Toolbar icon at the end of the QAT, you can easily modify the Quick Access toolbar to add or remove commands of your choice.
- 2 The *File* tab can be used to open the *Backstage* where you can print a message and set additional properties for the message.
- **3** The *ribbon* contains five tabs (in addition to the *File* tab) that can be used to manage, control and format a mail message.

The **Message** tab (as shown in the example above) can be used to apply basic formatting to the message, insert items, set follow-ups, and flag the importance of a message.

The **Insert** tab contains tools that enable you to insert items such as attachments, tables, illustrations, text boxes, WordArt, equations, symbols and lines.

The **Options** tab contains tools that can be used to manage your message, such as whether you want to use voting buttons and tracking features, specify delayed delivery details, set permissions and so on.

The **Format Text** tab contains all of the formatting commands for your mail message, whereas the **Message** tab only contains basic formatting command tools.

The **Review** tab contains tools that let you check a message before sending it, such as the spell checker, thesaurus and word count.

4 The message *header* is where you address your mail message and enter the subject. It can also display information about the message in an *Info Bar*, such as whether or not it has been sent, if there are any actions that have been specified by the author, and so on. If you have more than one email account (Outlook 2010 supports multiple Exchange accounts within an Outlook profile), Outlook will display an additional field in the header called *From* in which you can select the desired email address.

CREATING A NEW MESSAGE

Mail messages in Outlook can be created from virtually anywhere in Outlook – you don't specifically need to be in the **Mail** feature. A mail message appears in a **Message** window. In this window you

Try This Yourself:

Before starting this exercise ensure Outlook has started...

1 Click on the *Home* tab and click on *New E-mail* in the *New* group to display a new message window

> This may sound a little corny, but we'll actually address the message to ourselves...

- 2 Click on **[To]** to open the **Select Names** dialog box
- 3 Double-click on the desired user name to copy it to the message recipient box to the right of **To**
- 4 Click on **[OK]** to place the name in the field to the right of **To** in the message window
- 5 Click in *Subject* and type My First Email Message

If you don't type a Subject and click on [Send], Outlook will display a message asking you to confirm that you meant to leave the Subject blank...

6 Click in the large white message box beneath the header and type:

Today I am learning how to send email messages. I am sending it to myself. specify the recipient details, the subject and the main text of the message. You can also specify who will receive a courtesy copy (*Cc*) if desired.

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For Your Reference...

To **create** a **new message**:

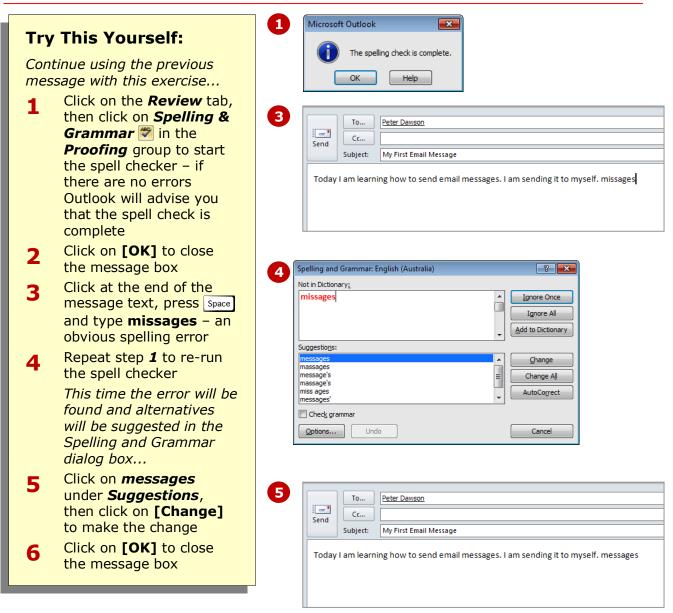
- 1. Click on **New E-mail** in the **New** group
- 2. Click on **[To]**, select the name and then click on **[OK]**
- 3. Type the **Subject**
- 4. Type the message

Handy to Know...

- You can create a new mail message from any Outlook feature by clicking on *New Items* in the *New* group on the *Home* tab and selecting *E-mail Message*.
- If you click in **To** and begin typing the recipient's email address, Outlook will use AutoComplete to display relevant addresses.

CHECKING THE SPELLING

Outlook comes complete with a spell checker that works in the same way as in other applications, offering suggestions where appropriate. The spell checker will not only check the text that you type in a message, it will also check the Subject text as well. Additionally, you can use the spell checker to check your tasks, meeting requests, appointments and more.



For Your Reference...

To **check** the **spelling** in a message:

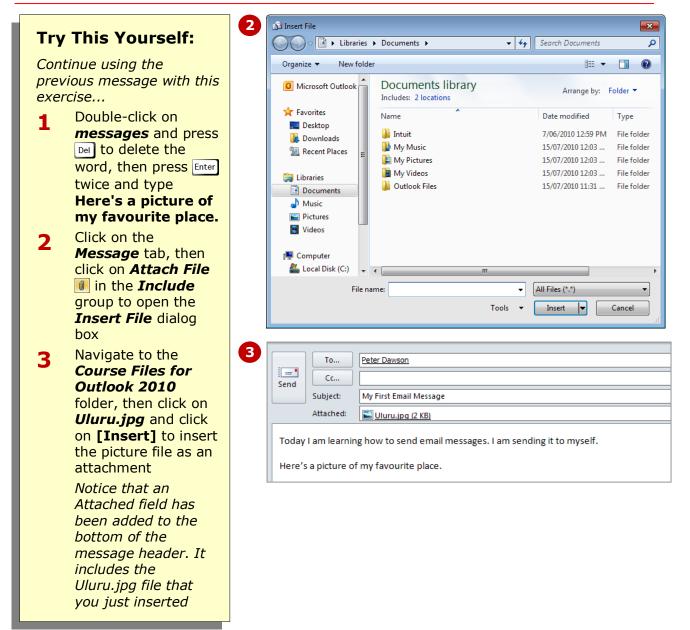
Click on Spelling & Grammar Proofing group on the Review tab

Handy to Know...

 Because email messages are often written and sent off quickly, they tend to lack the formality and protocol of a postal message. Nevertheless, you should ensure the spelling is correct before sending the message.

ADDING AN ATTACHMENT TO A MESSAGE

Attachments are usually computer files that contain additional information for the recipient. It might be a picture file (perhaps you are sending a picture of a family wedding to an overseas relative), a document from a word processing application, or a data file from a spreadsheet or database. *Attachments* are inserted into the message.



For Your Reference...

To **add** an **attachment** to a message: 2. Click on **Attach File** I in the

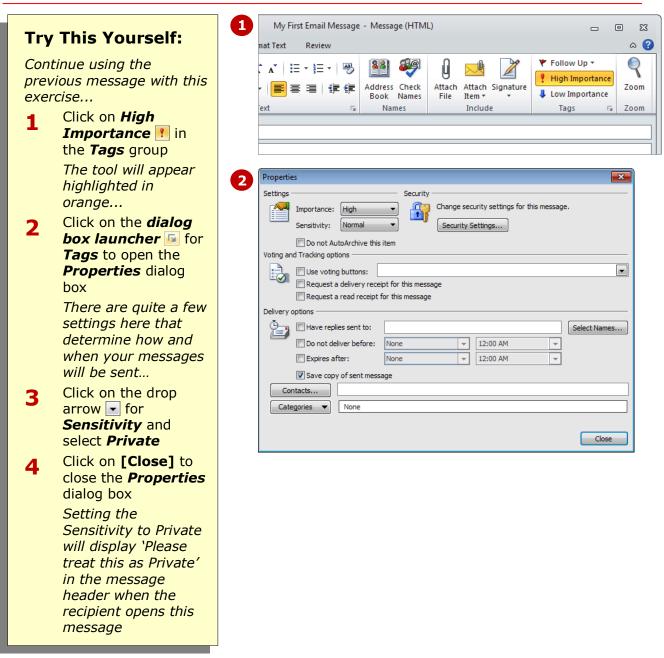
- **Include** group on the **Message** tab
- 3. Navigate to the desired folder
- 4. Click on the file
- 5. Click on [Insert]

Handy to Know...

 Attachments are the cause of many computer problems, especially over the internet. Many computer viruses are transmitted over the internet through attachment files.

ADDING IMPORTANCE

Outlook allows you to add **importance** to an email message. All messages have some degree of importance attached to them – unless you specify otherwise, it is set to **normal**. But, if you feel that your message needs more attention, you can assign high importance to it. By setting the level of importance, you also enable the email recipients to sort messages by importance.



For Your Reference...

To **change** the **importance** of a message:

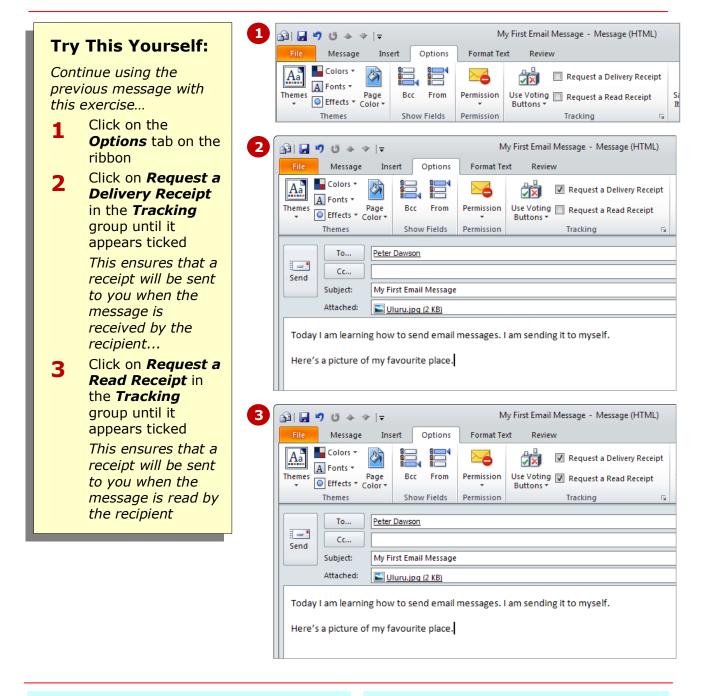
- 1. Click on *High Importance* !! in the *Tags* group on the *Message* tab
- 2. Click on the *dialog box launcher* for *Tags*
- Set **Sensitivity** as desired and click on [Close]

Handy to Know...

- Sensitivity options in the Properties dialog box are only advisory – they do not force what action the recipient takes.
- Don't overuse the *High Importance* flag. Too much use of this and your recipients will begin to ignore your messages!

REQUESTING MESSAGE RECEIPTS

Just because an email message is sent to someone, it doesn't necessarily mean that they have received or read it. If you want to be sure that a message has arrived and that it has been opened, you can mark your message so that an electronic **receipt** is generated and sent back to you when your message arrives at the recipient's address.



For Your Reference...

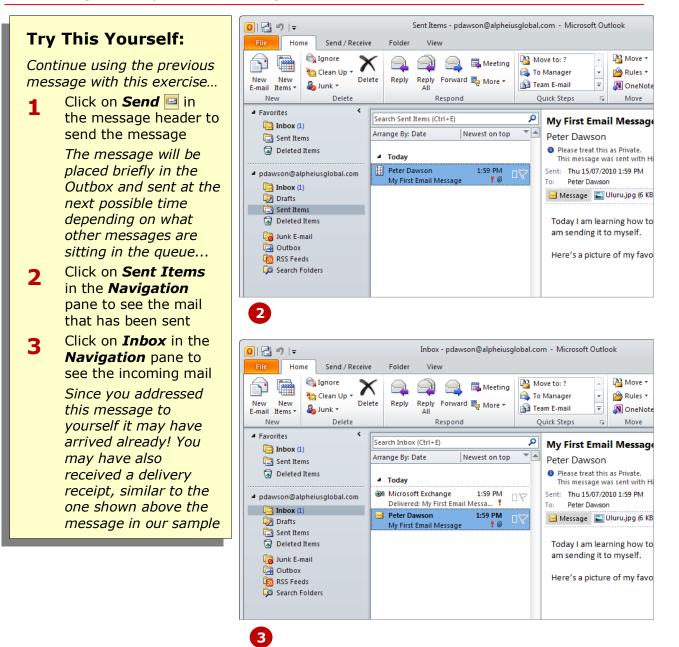
- To *request* a *message receipt*:
 - Tick Request a Delivery Receipt in the Tracking group on the Options tab to request a delivery receipt, or Tick Request a Read Receipt in the Tracking group on the Options tab to request a read receipt

Handy to Know...

 While read and delivery receipts are useful they do not guarantee that the person to whom the message was sent was the person who actually opened it and read it. Sometimes, formally requesting a reply from the recipient is a better option.

SENDING THE MESSAGE

Once you have addressed the message, composed it, added any attachments, and assigned importance and receipts if necessary, you are finally ready to **send** the message. When you send a message it actually travels through two folders: the **Outbox** where it awaits transmission and the **Sent Items** box where it is saved after it has been transmitted.



For Your Reference...

To **send** a **message**:

1. Click on **Send** in the message header

Handy to Know...

 Once a mail message has been sent, it is placed in the *Sent Items* folder. From this folder you can resend the message which can be handy if you forgot to add an attachment to the message, or you can send it to another recipient altogether.

ones that you would use in a postal letter.

also use this as a marketing or advertising

opportunity and provide additional text or

You can be formal or informal. Some people

CREATING AN AUTOSIGNATURE

Even though the computer will automatically add your email user name to the email message, it is still deemed to be good practice to **sign off** on your email messages. These sign-offs are like the

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	on the Message tab		Yours sincerely	
]	Peter Dawson	
			Alpheius Global Enterprises	

graphics.

For Your Reference...

To **create** an **autosignature**:

- 1. Create a new email message
- Click on Signature in the Include group on the Messages tab and select Signatures
- 3. Click on [New] and name your signature
- Type and format your signature text in *Edit signature*, and then click on [OK]

Handy to Know...

 Formatting options can be applied to an *AutoSignature* if you use plain text as your message format. The formatting will not be visible in your outgoing messages, but it will be visible to recipients who use HTML or .rtf message formats.

USING AN AUTOSIGNATURE

AutoSignatures are applied automatically to all new email messages that you create. Once you have created an AutoSignature and nominated it for new mail messages,

it will appear at the bottom of any new email messages that you create. This is a great time saver if you create many emails a day.

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Try This Yourself:		File Message Insert Options Format Text Review
<i>Before starting this exercise ensure you have created an AutoSignature</i>		↓ Cut ▼ 11 ↓ ▲ ▲ ↓ ⋮ = * ⋮ = * ↓ ♥ ▲ ▲ ▲ ▲ ▲ </th
 Create a new email message Notice how the AutoSignature has appeared in the white message box Select your user name in To, type Testing the AutoSignature in Subject and type In this message I am testing the AutoSignature. It 	2	To Image: Construction of the state of the stat
 is working fine. above the AutoSignature as shown Click on <i>Send</i> [□] to send the message 		Image: Copy Paste Copy Paste Copy Paste Format Painter Clipboard Calibri (Bod) * 11 * A* A* := * := * Image: Copy Paste Clipboard Image: Calibri (Bod) * 11 * A* A* := * := * Image: Calibri (Bod) * 11 * A* A* := * := * Image: Calibri (Bod) * 11 * A* A* := * := * Image: Calibri (Bod) * 11 * A* A* := * := * Image: Calibri (Bod) * 11 * A* A* := * := * Image: Calibri (Bod) * 11 * A* A* := * := * := * Image: Calibri (Bod) * 11 * A* A* := * := * := * Image: Calibri (Bod) * 11 * A* A* := * := * := * Image: Calibri (Bod) * 11 * A* A* := * := * := * Image: Calibri (Bod) * 11 * A* A* := * := * := * Image: Calibri (Bod) * 11 * A* A* := * := * := * Image: Calibri (Bod) * 11 * A* A* := * := * := * Image: Calibri (Bod) * 11 * A* A* := * := * := * Image: Calibri (Bod) * 11 * A* A* := * := * := * Image: Calibri (Bod) * 11 * A* A* := * := * := * := * Image: Calibri (Bod) * 11 * A* A* := * := * := * := * := * := * := * :
		In this message I am testing the AutoSignature. It is working fine. Yours sincerely Peter Dawson Alpheius Global Enterprises

For Your Reference...

To **use** an **AutoSignature**:

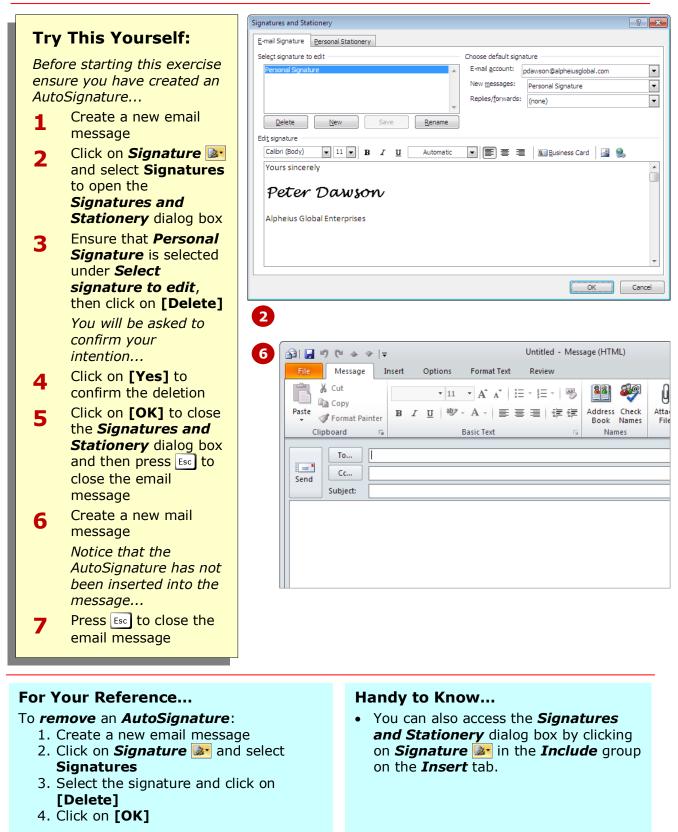
1. Create a new email message – the AutoSignature will appear automatically

Handy to Know...

 Although you can create more than one AutoSignature, only one AutoSignature will be set as the default. If you want to insert a different AutoSignature, click on *Signature* and select the signature name from the list of signatures.

REMOVING AN AUTOSIGNATURE

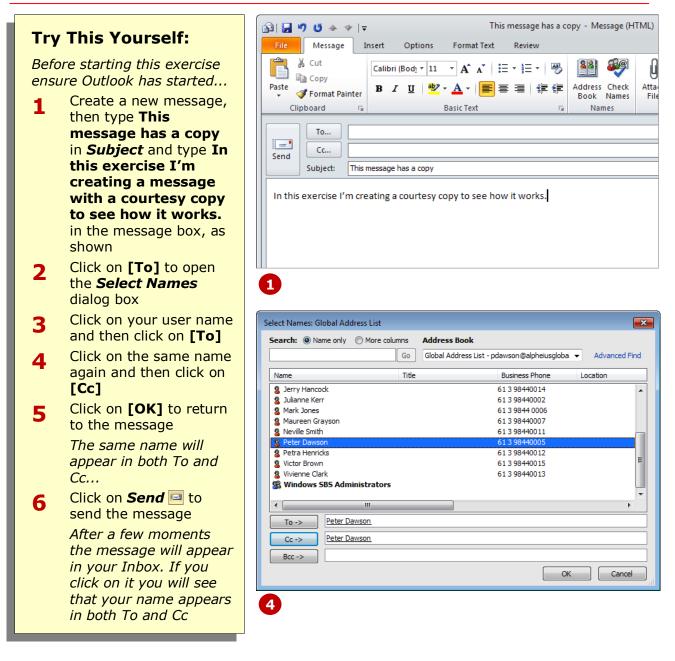
Outlook allows you to have multiple **AutoSignatures**. For example, you may create one for formal business emails, another for personal emails, and perhaps several different ones for the various roles or jobs that you perform in your organisation. To ensure that the list of available AutoSignatures doesn't get out of hand, you can remove unwanted signatures.



SENDING A COURTESY COPY

With normal postal letters, it can be time consuming to send additional copies of a letter to someone else. You need to photocopy the letter, create a new envelope and spend just as much time and

effort as you did on the original. But with email, you can send a copy of a message to another person simply by inserting their email address in the *Cc* (*Courtesy Copy*) field.



For Your Reference...

To **send** a **courtesy copy**:

- 1. Create a new message, then click on [To]
- 2. Select the recipient and click on [To]
- 3. Select the recipient for the courtesy copy and click on **[Cc]**
- 4. Click on **[OK]** and then click on **Send**

Handy to Know...

 When creating a new mail message, you can open the *Select Names* dialog box by clicking on either [To] or [Cc] in the new message window.

of an email to another person without the

Bcc field will not appear in the main

main recipient being aware of this fact, you can send the message as a **blind copy**. The

SENDING A BLIND COPY

When a recipient receives an email that has also been sent to others as a courtesy copy, the main recipient can see exactly who has received a copy of the email in the *Cc* field. But if you wish to send a copy

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😰 | 🛃 🍠 😈 🔺 👻 | - This message has a blind copy - Message (HTML) **Try This Yourself:** Message Insert Format Text Options Review Before starting this exercise 🔏 Cut 88 Calibri (Bod) - 11 - A A Ā 🗄 = - 🗄 = - 🕮 Copy ensure Outlook has started ... Paste B / U | ♥ - A - | ■ = = | ∉ ≇ Address Check Atta I Format Painter Book Names File Create a new message, Basic Text Clipboard Names then type This message has a blind То... _ copy in *Subject* and Сс... Send type In this exercise Subject: This message has a blind copy I'm creating a In this exercise I'm creating a message with a blind copy to see how it works. message with a blind copy to see how it works. in the message box, as shown Click on [To], doubleclick on your user name, 1 and then click on [OK] Open the **Options** tab, This message has a blind copy - Message (HTML) 👔 🛃 🍠 (भ 🛧 🗇 🖙 and then click on Bcc 📳 Message Insert Options Format Text Review in the **Show Fields** Colors 🔻 Aa 4 🔲 Request a Delivery Receipt group A Fonts * Page Use Voting 🔲 Request a Read Receipt From Permission Themes Bcc The Blind Copy (Bcc) Effects * Color Buttons field will appear in the Themes Show Fields Permission Tracking Б message header... Peter Dawson То... Click on [Bcc], double-- -Cc... Send click on your user name, Bcc... and then click on **[OK]** Subject: This message has a blind copy You will receive a blind copy of the email... In this exercise I'm creating a message with a blind copy to see how it works. Click on **Send** is to send the message You must turn off Bcc... 3 Create a new message, repeat step 3 to deselect **Bcc**, then press Esc to close the message

message.

For Your Reference...

To **send** a **blind copy** of an email:

- 1. Create a new message
- 2. Click on **Bcc** 🔚 in the **Show Fields** group on the **Options** tab
- 3. Type the blind copy recipient in **Bcc**

Handy to Know...

You can add a blind copy recipient by clicking on **[To]** or **[Cc]** in the header area of a message. You can then add recipient names to **Bcc** in the **Select** Names dialog box. When you close this dialog box, the **Bcc** field will appear in the header of the email.

CONCLUDING REMARKS

Congratulations!

You have now completed the **Sending email** booklet. This booklet was designed to get you to the point where you can competently perform a variety of operations as listed in the objectives on page 2.

We have tried to build up your skills and knowledge by having you work through specific tasks. The step by step approach will serve as a reference for you when you need to repeat a task.

Where To From Here...

The following is a little advice about what to do next:

- Spend some time playing with what you have learnt. You should reinforce the skills that you have acquired and use some of the application's commands. This will test just how much of the concepts and features have stuck! Don't try a big task just yet if you can avoid it small is a good way to start.
- Some aspects of the course may now be a little vague. Go over some of the points that you may be unclear about. Use the examples and exercises in these notes and have another go these step-by-step notes were designed to help you in the classroom and in the work place!

Here are a few techniques and strategies that we've found handy for learning more about technology:

- visit CLD's e-learning zone on the Intranet
- read computer magazines there are often useful articles about specific techniques
- if you have the skills and facilities, browse the Internet, specifically the technical pages of the application that you have just learnt
- take an interest in what your work colleagues have done and how they did it we don't suggest that you plagiarise but you can certainly learn from the techniques of others
- if your software came with a manual (which is rare nowadays) spend a bit of time each day reading a few pages. Then try the techniques out straight away - over a period of time you'll learn a lot this way
- and of course, there are also more courses and booklets for you to work through
- finally, don't forget to contact CLD's IT Training Helpdesk on **01243-752100**