Design Document: Outlook Email Basics

Class Description

Learn to create a free Microsoft Outlook email account and use its features to send, receive, and organize email messages in this class.

**Curriculum Track**

Basics

**Audience**

Adults

**Course Length**

90 minutes

**Training Method**

Instructor-led hands-on

**Purpose**

To introduce new users to the basic terminology and functionality of email

Equipment Requirements

Projector and projection screen; computers with internet access for the instructor and each participant; laser pointer (recommended)

Software Requirements

Windows 7

Material Requirements

Pens or pencils, activity sheets, handouts, participant surveys, sample picture (electronic)

**Learning Objectives**

At the end of the session, learners will be able to:

* Identify basic email terminology
* Create an Outlook email account
* Perform the following basic email functions:
  + Send an email
  + Reply to an email
  + Attach a document to an email
  + Create a folder
  + Save an email to a folder
  + Move an email to a folder

**Assessment Technique(s)**

Successful creation of email account and completion of class activities

Content Outline

**Agenda(3 mins)**

* Terminology & Descriptions
* Creating an Outlook Account
* Managing & Customizing the Inbox
* Viewing & Composing an Email
* Attaching a File to an Email

**Talking Points, Topics, and Activities (85 mins)**

* Terminology & Descriptions
* Define the following terms and illustrate each one with a graphic or screenshot/call-out box:
  + **Email**: A system for sending messages from one user to another via a computer with an internet connection
  + **Inbox**: The area of your email program where messages arrive
  + **Folder**: A tool for storing and organizing messages inside your email program (like a folder in a filing cabinet)
  + **Sent mail**: The folder where the emails you send to other users are stored
  + **Attachment**: A electronic stand-alone document or file that is delivered through an email message; represented by a paper clip icon
* Creating an Outlook Account
* Demonstrate and explain the following steps to create an Outlook account:

1. Access an internet browser and type [**outlook.com**](http://www.microsoft.com/en-us/outlook-com/) into the **Search** box
2. Arrive at the Outlook **Sign in** page; highlight the various areas and mention that this is where users go to log in to their email accounts
3. Click on the **Sign up now** link in the lower right corner of the screen
4. Point out the following fields:

* **First** and **Last Name**
* **Outlook User name**
  + Explain that this is the unique name that will identify them to Outlook when they log in and is the part that comes before @outlook.com
  + Recommend that users select a username based on how they intend to use the program; if it’s for professional purposes, they will want some combination of their first and last name or initials versus something funny or cute, as they might select for a personal account
* **Password**
* Encourage participants to choose a unique password that includes a combination of upper case and lower case letters, numbers, and symbols/special characters to make it harder for someone to uncover their passwords
* **Country/Region**
* **ZIP Code**
* **Birthdate**
* Required so Outlook can determine if the user is a minor; user birthdate will not be displayed without permission
* **Gender**
* **Phone Number**
* Allows the password to be reset with a code sent to a cell phone
* **Alternate Email Address**
* Allows the password to be reset from another email account
* **Type in Characters you see** (case sensitive)
* **Promotional Offers from Microsoft**
* Read **Microsoft Services Agreement** and **privacy and cookies statement**
* **Create Account**

**ACTIVITY**: Have participants complete **Activity #1** on the *Activity Sheet*

* Managing & Customizing the Inbox
* Give participants an orientation to the **Home** page as you highlight and explain the following areas:
* **Navigation** bar
* Point out that Outlook.com is one of many integrated applications from Microsoft and that by signing up for an account, users also get access to the following:
* **Outlook.com** (email)
* **People** (contacts)
* **Calendar**
* **OneDrive** (cloud storage and document sharing)
* **Word Online** (documents)
* **Excel Online** (spreadsheets)
* **PowerPoint Online** (presentations)
* **OneNote Online** (notebook)
* **Sway** (interactive reports, presentations, and stories)
* **Office Online**
  + Share that users access all the apps by clicking the button with 9 squares in the upper left corner of the screen
* **Search** box (search messages by keyword, sender name, etc.)
* **New** button (compose a new email)
* **Inbox** (new messages appear)
* **Settings** (adjust reading pane, change background color, select/deselect categories)
* **Arrange by** (options for displaying emails)
* Attachment (indicated by a paperclip- means a file is included)
* **Folders** (way to organize messages; includes **Inbox**, **Archive**, **Junk**, **Drafts**, **Sent**, **Deleted** and **New** **folder** by default)
* **Sign Out**
* Show participants how to create a new folder by clicking on the New folder link in the left tool bar; name the folder **Important**, to help prepare them for their upcoming activity
* Demonstrate how to move a file from the **Inbox** into the **Important** folder

**ACTIVITY**:Have participants complete **Activity #2** on the *Activity Sheet*

* Viewing & Composing an Email
* Explain that each email displays 4 components (by default) when it arrives in the Inbox: Sender, Subject, Attachment (indicated by a paper clip, if there is one), and Date received
* Click on a message in your Inbox and tell participants that this is how they open an email
* Once the message is open, show and explain the following areas of the message:
* **Reply** (respond or forward)
* **Delete** (trash a message)
* **Archive** (save messages, like a filing cabinet)
* **Junk** (options for unsubscribing and getting rid of spam)
* **Sweep** (a clean-up assistant)
* **Move to** (organize messages in folders)
* **Categories** (add categories to messages)

**ACTIVITY**:Have participants complete **Activity #3** on the *Activity Sheet*

* Attaching a File to an Email
* Explain that attaching a file to an email consists of 4 easy steps:
* Click **Insert** > **Files as Attachments**
* Browse the computer to find the file
* Click on the file to select it
* Click the **Open** button to attach it to the message
* Share that once the file is attached, users can type in text to accompany the message before hitting the **Send** button to deliver the file to the recipient

**ACTIVITY**: Have participants complete **Activity #4** on the *Activity Sheet*

**Wrap Up/Closing (3 min)**

* Highlight the upcoming technology classes and share the types of topics that will be covered
* Ask if there are any questions and answer any that were “parked” during the session
* Thank participants for coming and ask them to complete the class survey before leaving