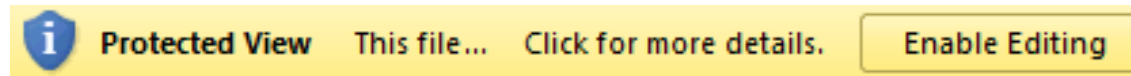


Before you begin

If a yellow security bar appears at the top of the screen in PowerPoint, click **Enable Editing**.



Microsoft® Outlook® 2010 Training

Save time with templates

Course contents

- Overview: The advantages of templates
- Lesson: Includes 2 instructional movies
- Quick Reference Card

Overview:

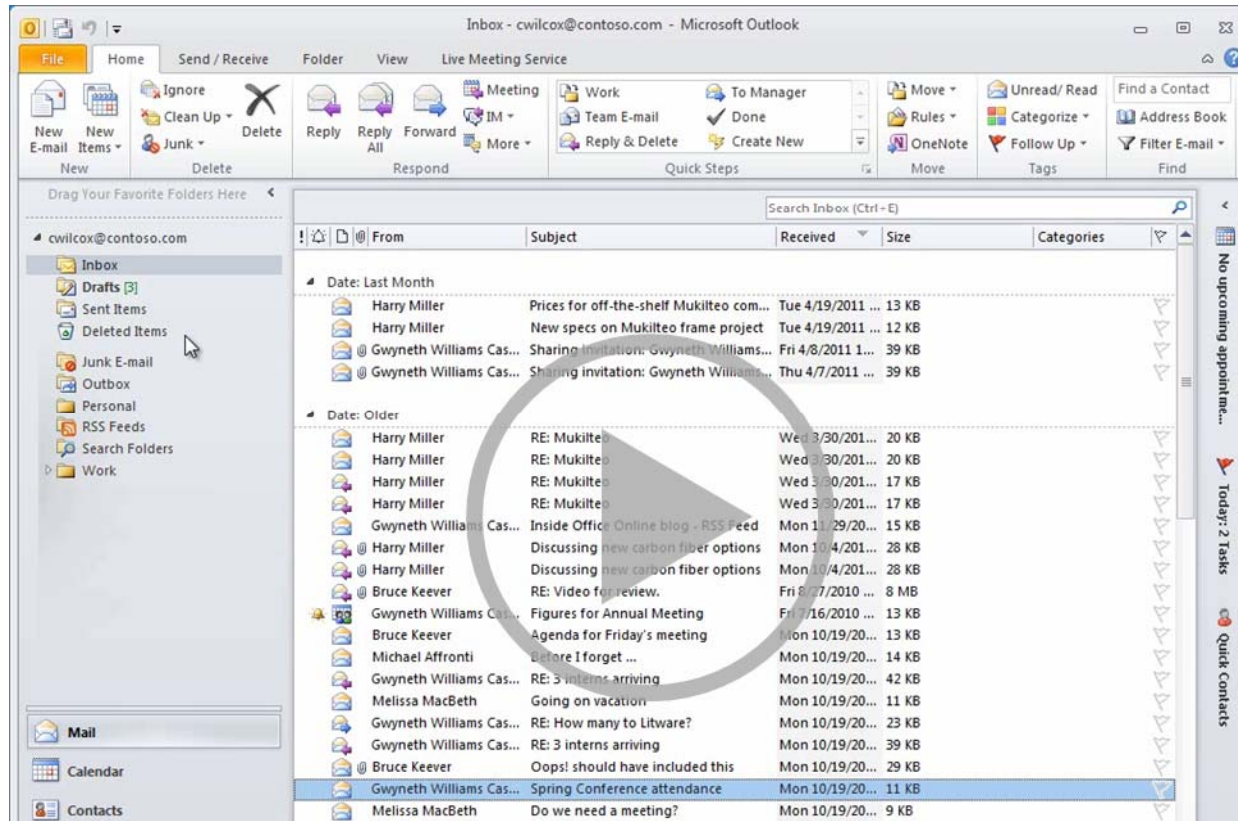


[If you constantly recreate an email message, appointment, or task, you can save time by using templates in Outlook 2010. This course explains how to create and share templates for email, calendar items, tasks, and contacts.

Course goals

- Create, save, and use an email template
- Download and customize a readymade email template
- Save appointments or meetings, tasks, and contacts as templates
- Share templates with others

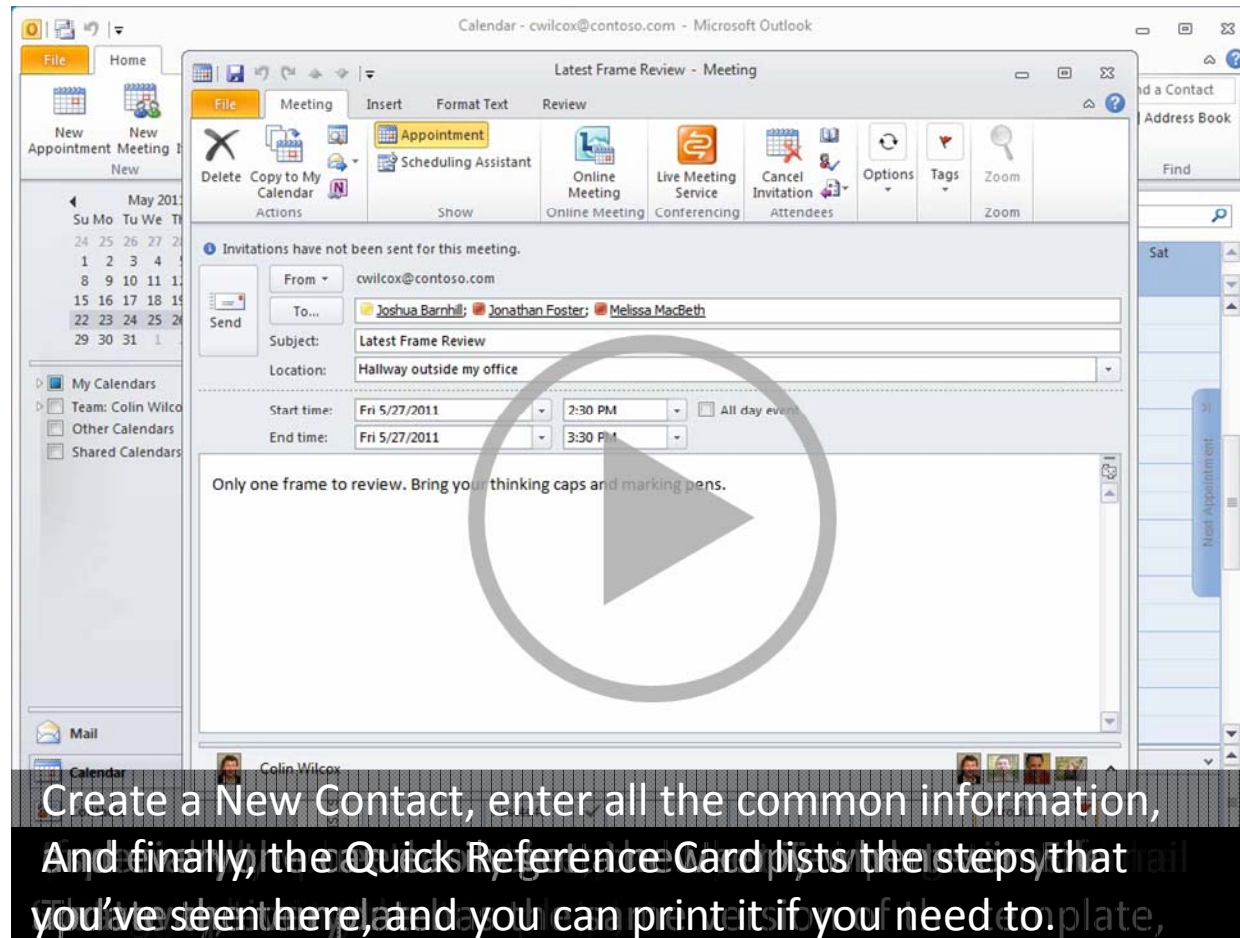
Create and use templates (4:41)



and next we'll look at how to use templates with calendar items, contacts and tasks, and how to share templates.

Point to the bottom of the video to see the video controls. Drag or point along the progress bar to move forward or go back.

Use templates with calendars, tasks, and contacts (4:41)



Point to the bottom of the video to see the video controls. Drag or point along the progress bar to move forward or go back.

Quick Reference Card 1

You create a template when

- You constantly recreate or customize a message, appointment, task, or other Outlook item.
- You repeatedly enter the same data, such as multiple contacts for a single organization.

You don't need templates for things that you set to recur automatically, such as a weekly meeting or that pesky reminder to clean out your Inbox every Tuesday morning.

Quick Reference Card 2

Create a template

1. Create a new email message, meeting, task, or other item that you want to save as a template.
2. In that new item, add any information.
3. When done, click the **File** tab in that open item, and then click **Save As**.
4. Open the **Save as Type** list and select **Outlook Template**.
5. Enter a name for the template and click **Save**.
6. Your template is now ready to use.

Quick Reference Card 3

Use a template

1. You follow these steps when you're working in mail, your calendar, your contacts, and so on.
2. On the **Home** tab, in the **New** group, click **New Items**, point to **More Items**, and then click **Choose Form**.
3. Open the **Look In** list and select **User Templates in File System**. You must select **User Templates in File System** or you won't see your template.
4. Click the template you want to use and click **Open**.
5. Fill in the missing information, such as dates, and then send the message or invitation, save the new contact or task, and so on.

Quick Reference Card 4

Share a template

1. On the **Home** tab, in the **New** group, click **New Items**, point to **More Items**, and then click **Choose Form**.
2. Open the **Look In** list and select **User Templates in File System**. You must select **User Templates in File System**. If you don't, you won't see your template.
3. Click the template you want to share and click **Open**.
4. In the open template, click the **File** tab, and then click **Save As**.
5. Open the **Save As Type** list and select **Outlook Template**. Do this step now, or Outlook will save the template to your local drive.
6. Navigate to your network location, such as a mapped network drive, and in the **File name** box, enter a name for your template, and then click **Save**.
7. Send an email to your coworkers about the new template.

Quick Reference Card 5

The online version of this Quick Reference Card provides more information. To see that version, go to

<http://office.microsoft.com/en-us/outlook-help/quick-reference-card-RZ102644316.aspx?section=5&mode=print>