

Using Email templates and Quick Parts to deal with common queries

In this document you will find instructions to help you 1) create and use email templates; and 2) embed previously stored answers which can be inserted in an email reply. The first is useful when you are originating a message. The second helps you deal with a frequently occurring situation where you are **not** creating, or, composing a fresh message but replying to an email message which contains a commonly asked question or questions. Outlook provides a mechanism for dealing with this, in which you can store 'parts' that can be inserted into your message; these are called **Quick Parts** [Quick Parts are also available within Word].

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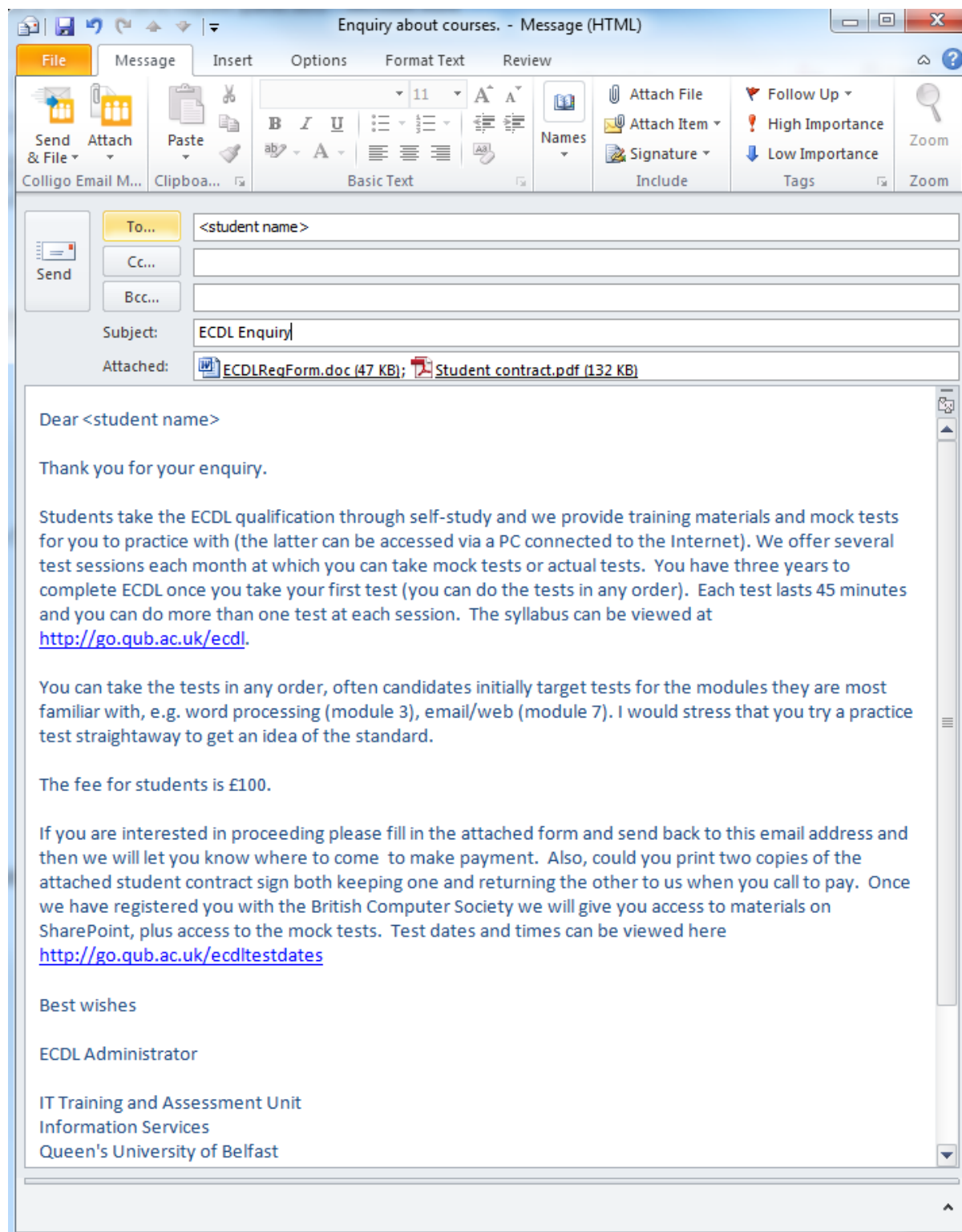
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Another useful document to consult is *How to do an E-Mail merge* available from <http://go.qub.ac.uk/itdocs> (look in the folder **EMAIL includes Outlook**, the PDF document is called Email Merge).

How to create and use an Email template

Create the template

The screen shot below shows the email message that the IT Training Unit sends in response to enquiries from students about taking ECDL Core. Any areas that may change are highlighted using <text>. Note the message includes an attachment.



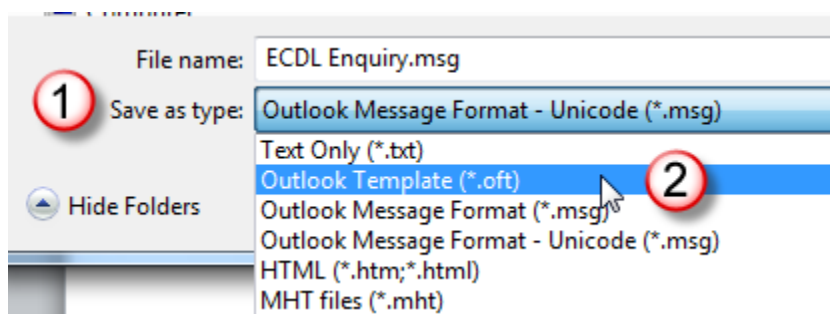
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The next step is to store this message so that it can be re-used. These steps are outlined below:

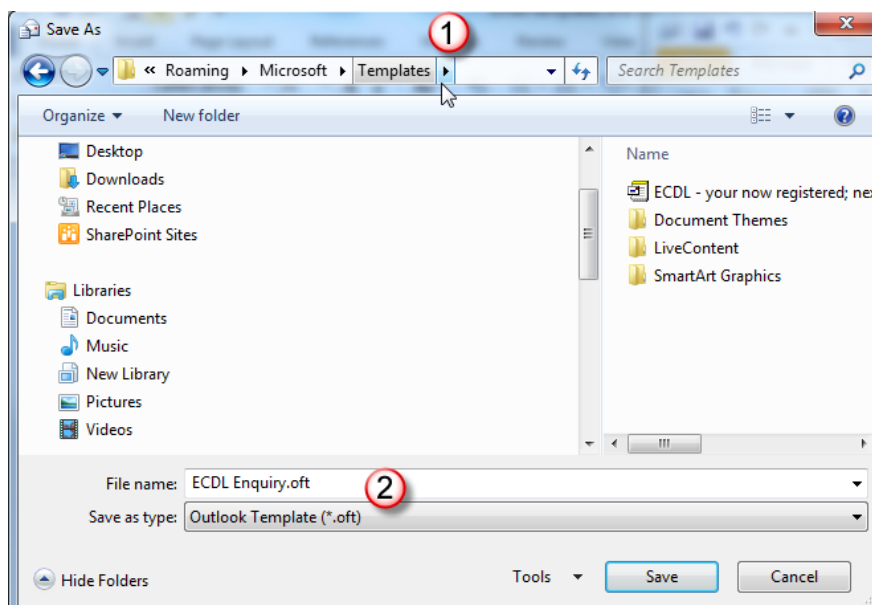
1. Click the File tab then choose **Save As**



2. This displays the Save As dialogue box. Click the 1) **Save as type** drop down list and 2) choose **Outlook Template (*.oft)**.



This choice changes the Save As box to 1) display the template folder on your C: drive and 2) changes the message type to **.OFT**, see below. Choose **Save**.

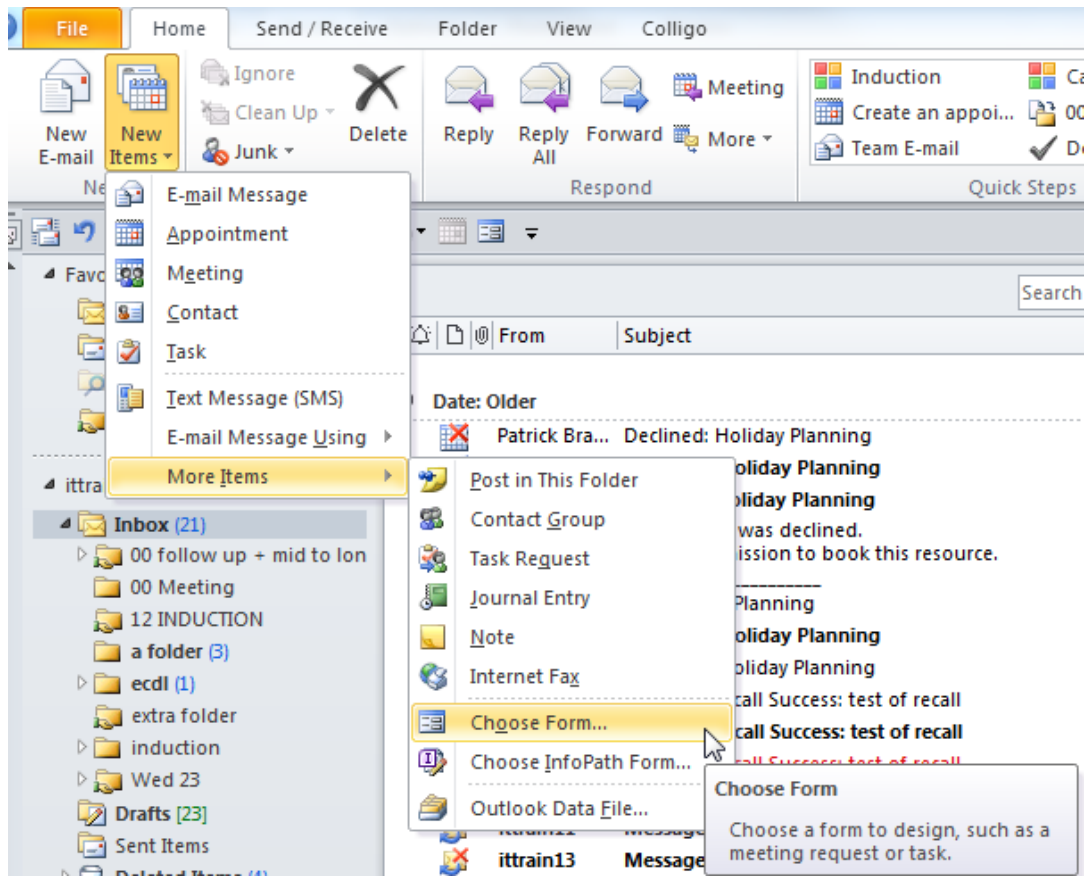


NOTE: It is better to store email templates in your local drive as they are easier to retrieve from there. If you want other colleagues to use this template then you need to provide them with a copy to store on their C: drive.

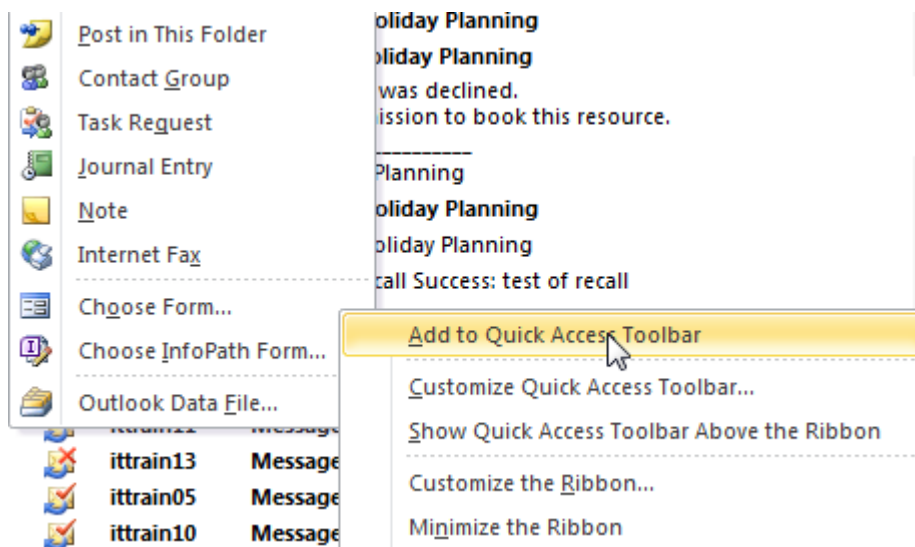
Close the original message, as it is no longer needed.

Use the template

1. To use an email template, the sequence is **New Items, More Items, Choose Form** (shown below).



Tip: This is cumbersome and it is advisable to create a short cut to place on the Quick Access toolbar. At the last step, shown above, (**Choose Form**) right click this menu item and choose **Add to Quick Access Toolbar**.

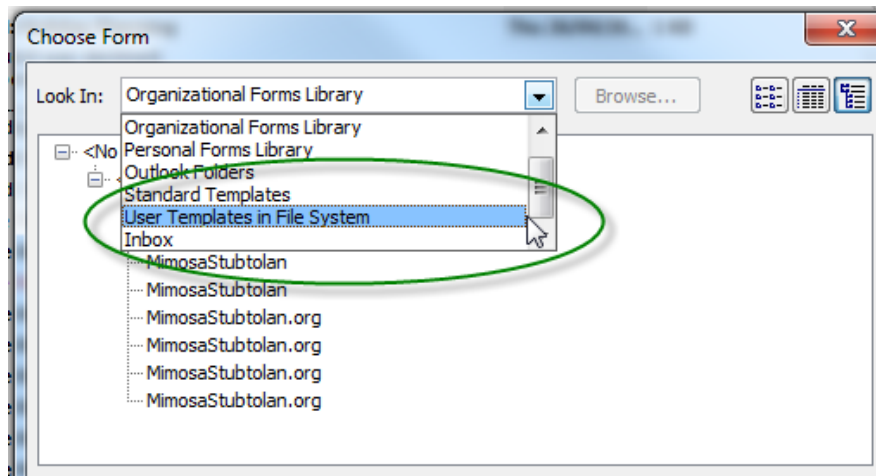


The short cut is displayed as a button on the Quick Access Toolbar (as shown below):

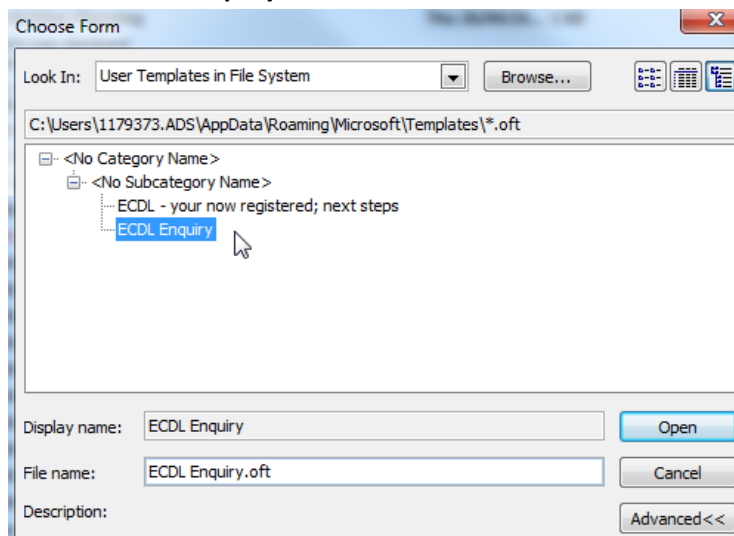
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2. When you **Choose Form**, the **Choose Form** dialogue box is displayed. From the **Look in** drop down list choose **User Templates in File System**.



3. The dialogue box changes to reflect this choice. Double click the 'form' you want to use, in this case **ECDL Enquiry**.



The message opens ready for you to use.

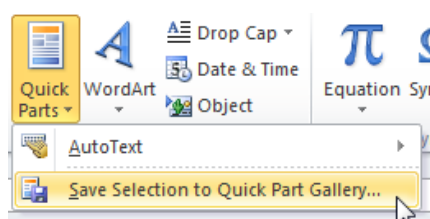
Saving and using Quick Parts to deal with common queries

The steps below show you how to **Devise the parts**, **Create the Quick Parts**, **Use Quick Parts** and **Manage Quick Parts**.

1. **Devise the parts:** Identify the text parts that you wish to use for your replies. The table shows a plan which divides up common answers to questions about ECDL registration and the next set of steps following registration; three parts in all. The table also contains a notation, **1ECDL** etc., which will help provide a short cut to label and retrieve each part from the gallery of Quick Parts. It is useful to use a convention to label each part.

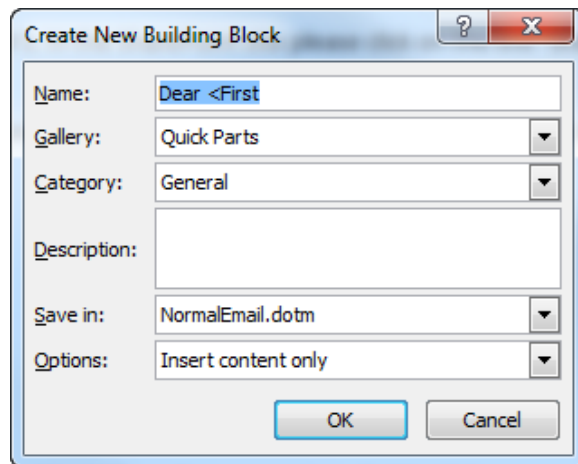
1ECDL
Dear <First Name> You are now registered for ECDL. 1) Access to Training Materials and instructions to set up practice tests I have given you access to a SharePoint site – http://go.qub.ac.uk/ecdlcandidates Log in using ads\your student number and the password is your usual Queen’s. In the SharePoint site please click on the link “Shared Documents” and read the document called “Advice for ECDL (core) candidates”. You will be directed to training materials plus a folder called “Litmus Instructions” containing documents advising you how to set up your Web browser to access the Litmus practice tests. Please remember, that you still need to attend test sessions to take the real tests.
2ECDL
2) Credentials for logging in to take the mock tests: Your username is your BCS Id BCS<id> Password is <xxxxx>
3ECDL
3) Practice/Test Dates The test dates for the coming weeks are at http://go.qub.ac.uk/ecdltestdates . You tell us when you arrive what test(s) you want to do. You can take the tests in any order. You can come to take practice tests at any of these sessions.

2. **Create the Quick Parts:** On the Home tab click **New E-mail**. Copy and paste or type the text into the body of the message. **Highlight a part** that you wish to store as a quick part. Then from the **Insert** tab click **Quick Parts** and choose **Save Selection to Quick Part Gallery**.



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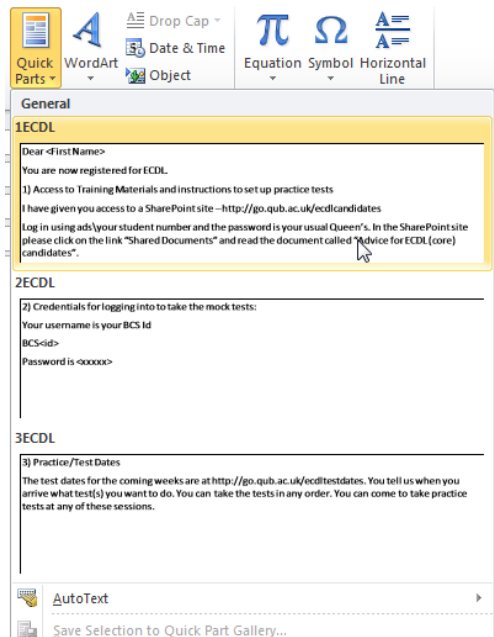
- This displays the **Create New Building Block** dialogue box (here the quick part is called a block). Enter a name for the 'block'. In this example **1ECDL** for the first block or quick part.



You may wish to use the **Category** drop down list (see above) to create a new category to group together responses which cover similar areas (e.g. **ECDL** for the ECDL quick parts).

Repeat these steps for each of the parts.

- Use Quick Parts:** Compose a new message and click into the body of the message (this is an important step). There are at least two ways to insert a Quick Part in the message:
 - 1) From the Insert tab click **Quick Parts** and then click the part you wish to insert.

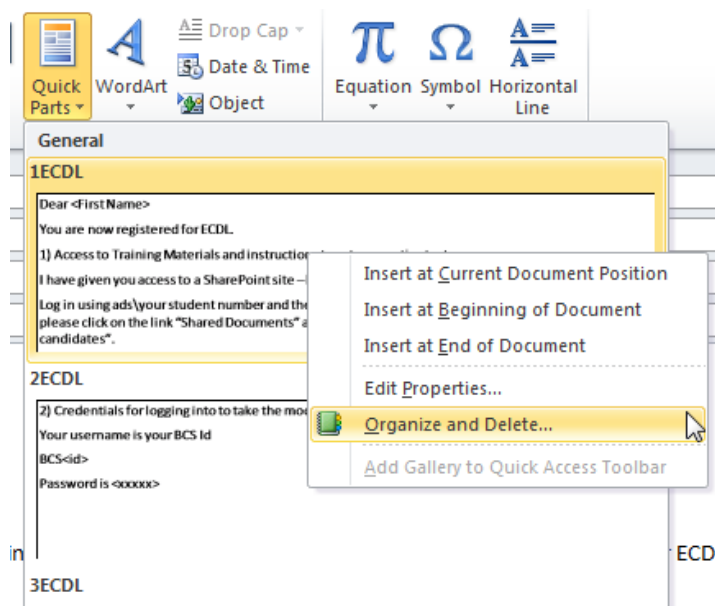


Or

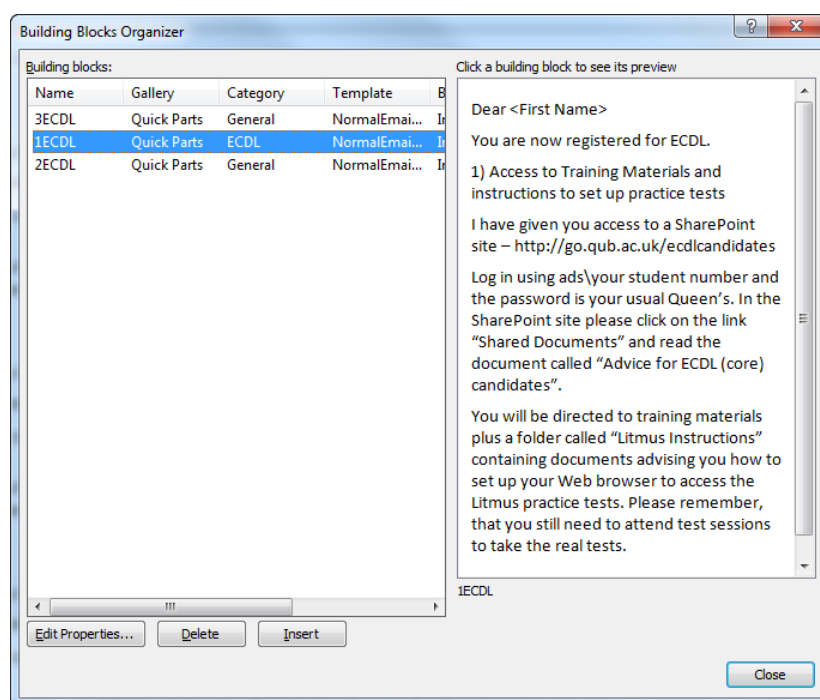
- 2) Type the first few characters of the Quick Part followed by the **F3** Function key.

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5. **Manage Quick Parts:** From the Insert tab click **Quick Parts**, then right click one of the Quick parts, and from the menu choose **Organise and Delete**.



This displays the **Building Blocks Organizer** where you can for each block **Edit Properties**, **Delete** or **Insert** a block.



A video alternative to these instructions:

Help within Outlook provides a link to this useful YouTube video. Entitled **Using Quick Parts in Outlook (and Word) 2010**, it was created by an academic in Palomar College, San Marcos, California:

<http://www.youtube.com/watch?v=ojGSeOQXhAY>