

Outlook 2016: Part 1



Student Learner's Guide

Microsoft[®] Office Outlook[®] 2016: Part 1

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Outlook[®] 2016: Part 1

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ABOUT THIS COURSE

COURSE PREREQUISITES

This guide assumes the learner understands the basics of using a Windows-based computer. Students should be comfortable using the keyboard, mouse, and Start menu. Understanding and experience with printing and using a web browser is an asset, but not required. No previous experience with other versions of Outlook is necessary.

COURSE OVERVIEW

This is the first part of Microsoft Office Outlook 2016, Microsoft's personal information management program.

COURSE OBJECTIVES

By the end of this course, users should be comfortable with using and customizing the Outlook 2016 interface, creating and sending messages, managing contacts, using the calendar, managing tasks, and working with notes.

How To Use This Book

This course is broken up into eight lessons. Each lesson focuses on several key topics, each of which are broken down into easy-to-follow concepts. At the end of each topic, you will be given an activity to complete. At the end of each lesson, we will summarize what has been covered.

Before you begin, download the course's Exercise Files to a convenient location. They will be referenced throughout this course and are a key part of your learning experience.

LESSON 1: GETTING STARTED WITH OUTLOOK 2016

Lesson Objectives

In this lesson you will learn how to:

- Navigate the Outlook interface
- Perform basic e-mail functions
- Use Outlook help

TOPIC A: Navigate the Outlook Interface

Microsoft Office Outlook is a powerful and easy-to-use e-mail client and scheduling manager. Outlook is used in many organizations worldwide and it has become common in nearly all businesses.

Topic Objectives

In this topic, you will learn:

- About e-mail and e-mail addresses
- About Microsoft Outlook 2016
- About items and folders
- About components of the Outlook interface, with a focus on the ribbon
- About the Backstage view
- About the Mail, Calendar, and People workspaces
- About mail folders
- About read and unread messages
- About message icons
- About additional Outlook tools
- About Peeks

E-MAIL

The term **"e-mail"** refers to the electronic communication of messages between two or more parties that is almost instantaneous. Since its inception, e-mail has become the standard of communication in almost all organizations. With e-mail as pervasive as it is today, it is vital to keep your e-mail and your contacts organized. This is where an e-mail client steps in.

E-mail Clients

E-mail clients are applications that facilitate the sending, receiving, and management of e-mail. While many online e-mail clients are available from organizations such as Google and Microsoft, many people prefer the flexibility and organizational capabilities that a desktop e-mail client like Outlook can offer.

E-MAIL ADDRESSES

E-mail communication revolves around **e-mail addresses**. If you need to communicate with another person using e-mail, you need to know what their e-mail address is, such as **johnsmith@example.org**.

E-mail addresses are comprised of three main parts:

- The name or handle of the person that you are e-mailing (johnsmith in this example)
- The @ symbol

 The domain (example.org), which includes both the host name and an extension like .com or .org

ITEMS AND FOLDERS

It is important to remember that there are two interface objects that you will commonly work with in Outlook: items and folders. **Items** are individual objects. For example, an item can include a single e-mail message or a meeting in your calendar. **Folders**, on the other hand, are used to organize items. While you can have many different folders, the Inbox, Drafts, Sent Items, and Deleted Items folders are all included by default.

COMPONENTS OF THE OUTLOOK INTERFACE

The Outlook interface can be intimidating at first glance, but it can be broken down into several distinct parts. While the interface will be slightly different for each folder or workspace that we look at, the basic components will remain the same. Below you can see how the Outlook application looks when the Mail workspace is shown:

2		U	•
語 う = File Home Send / Receive	Folder View 💡 Tell me what you want to do.		
New New Email Items *	Reply Reply Forward More - All	Content New Property Content of Content	Citore
Favorites	9 Kespona	Quice steps is move sign mina ac	10-Ins
Inhox 4	Search current manbox ()	H Reply IS Reply All H Forward	
Clutter	All Unread By Date * Newest 4	Onervote Learn < reply@email.microsoft.com >	7/31
Sent Items	- Last week	weicome to OneNote	
Drafts	Program Closing - Office 20 Mon 9/21	If there are problems with now this message is displayed, click here to view it in a web prowser.	
		Bing Maps	+ Get more
jsmith@acmewidgets.onmicr	4 Older		
Inbox 4	OneNote Team		
Drafts	Get OneNote for free on all	N OneNote	View in browser
Sent Items	Jane Gibson 🔤		
Clutter	Missed conference call from 7/1/2015 Missed conference call from		
Conversation History			
Junk Email	There are more items in this folder on the server	Welcome to UneNote	
Outbox	Click here to view more on Microsoft Exchange	On Allate la consultable and have been for a superior and a second	
RSS Feeds		OneNote is your digital notebook for remembering and organi	zing everytning across
Search Folders		your work and personal life.	
Groups			
		You can install the OneNote app for free on your Windows, Ap	ple, or Android devices
		and access your content wherever you go.	
		Install OneNote on any device	
≝ ☶ 龄 說			-

Let's look at the various components that make up the interface.

1: File Menu (Backstage View)

Click the File tab to open Backstage view. With this view, you can manage your mailbox, open other Outlook files, print Outlook items, get help, modify Outlook options, and close Outlook.

2: Quick Access Toolbar

This specialized toolbar provides quick access to the commands you use most often.

3: Title Bar

The name of the current folder, your mailbox, and the program name will appear here.

4: Window Controls

From left to right, these are the Ribbon Display Options, Minimize, Maximize/Restore, and Close commands.

5: Tell Me

Using this text box, you can ask questions and access help information.

6: Tabs

Groups of like commands are organized under tab names. Click a tab to view related commands in the ribbon.

7: Groups

The commands on each tab are separated into groups. In the sample diagram, the Quick Steps group of the Home tab is identified. This group provides commands to apply and manage Quick Steps.

8: Navigation Pane

This pane is the easiest way to get around in Outlook. It contains links to various workspaces so that you can easily view your contacts, mail, calendar, and more. Sometimes this is also referred to as the Folder pane.

9: Search Box

Use this area to search for items within your mailbox.

10: Working Area

Here is where you can see the contents of the selected folder or workspace. In the sample diagram, we can see new mail because we're in the Inbox.

11: Reading Pane

View the contents of the selected item here.

12: Status Bar

Displays item count for the current folder as well as view commands and helpful information.

ScreenTips

ScreenTips appear as a small pop-up when you move your cursor over an object in the Outlook 2016 interface, such as a ribbon command:

	5	÷				
File	Ho	me Se	nd / Receive	Folder	View	♀ Tell me what
New I Email Ite	New 2ms -	िह्न Ignore 🍋 Clean 🇞 Junk र D	Up - Delete	Reply R	eply Forwa All Respon	Meeting
			Delete	e (Ctrl+D)		P Cu
			Derett	erns reenn		iy Date 🔻

They include information like the name of the object, what the object does, and a keyboard shortcut (if applicable).

Dialog Box Launchers

Some groups feature an option button (^[5]) beside the group name. Click this button to open a dialog with more specific controls relating to this group and other commands in the tab:

🖀 5 =		Inbox - jsmith@acmewidgets.onmicrosoft.com -	Outlook
File Home Send / Receive	Folder View Q Tell me what you want to do		
New New Email Items*	Reply Reply Forward @ More *	To Manager Done te 7 Creste New	Unread/ Categorize Follow Read - Up-
New Delete	Respond	Quick Steps G Move	Tags Find Add-ins
A Favorites	Search Current Mailbox (🔎 Current Mailbox 👻	CReply Reply All C Formula OneNote Team	? ×
Clutter	A Last Week	Welcome to O	Description:
Sent Items Drafts	msftconn@microsoft Program Closing - Office 20 Mon 9/21	If there are problems with h Bing Maps	Actions: Move to folder
 ismith@acmewidgets.onmicr 	4 Older	✓ Done	Shortcut key: None
Inbox 4	OneNote Team	Reply & Delete	Tooltip: Moves selected e-mail to a folder after
Drafts	Welcome to OneNote 7/31/2015 Get OneNote for free on all	X	marking the e-man as read.
Deleted Items 2 Clutter	Jane Gibson Missed conference call fro 7/1/2015 Missed conference call from		
Conversation History	There are more items in this folder on the server	w	<u>E</u> dit D <u>uplicate</u> <u>D</u> elete
Outbox	Click here to view more on Microsoft Exchange		
RSS Feeds		VOI Deutte Defaulte	OY Count
Search Folders		Beset to Defaults	OK Cancel

COMPONENTS OF THE RIBBON

The ribbon is the primary location where you interact with all the various commands and controls that are available in Outlook. It is comprised of two major parts: **tabs** and the **groups** that are found within them.

Groups (and their contained commands) that appear within a tab relate to the functions described by the tab name. For example, the View tab contains a variety of groups with commands to adjust how objects are displayed in Outlook:



There are five **tabs** (including the File tab) that are available in Outlook's main interface. Below is a breakdown of the kinds of commands that you will find in each tab:

- File: This tab gives you access to Backstage view. Here, you will find commands that are used to modify how Outlook in general or the selected Outlook item operates. You can find a variety of categories under this tab, including Save As, Info, and Print.
- Home: The Home tab is displayed by default, but the commands and title of this tab will depend whether you are working with the general Outlook window or a specific item. For example, if you have a message open in a separate window, the Home tab will be labeled Message and include commands to manage and work with the message. If you are working with the general Outlook window, this tab will include commands to manage items in Outlook.
- **Send/Receive:** This tab includes commands that relate to the sending and receiving of data to and from your e-mail account.
- **Folder:** This tab is used to manage the folders that make up Outlook. Here, you can find commands to modify folder properties, create new folders, and delete existing ones.
- View: On this tab, you will find commands to change how the Outlook layout is displayed.

THE BACKSTAGE VIEW

The Backstage view is accessed by clicking the File tab. It will look slightly different depending on whether you are in the main interface or inside the window for an Outlook item.

For example, if you click the File tab while viewing the main interface and Mail workspace, you will see commands to manage your e-mail account, messages, and other related settings:



Here is a quick overview of the items in Backstage view in this context:

Info	Manage your mailbox account settings, access mail cleanup tools, manage rules and alerts, and set up automatic replies.
Open & Export	Provides commands to open a calendar or Outlook data file. You can also start the Import and Export wizard from here or open another user's folder if you are on an Exchange server.
Save As	Save the currently selected item as a separate file outside of Outlook.
Save Attachments	Save attachments to the currently selected item as separate file(s) outside of Outlook. Only available if the selected item has attachments.
Print	Set print options for the selected item and print preview it.
Office Account	Modify the settings for the account that you are using to log into Office.
Options	Opens the Outlook Options dialog.
Feedback	Opens the Windows Feedback app.
Exit	Close Outlook.

If you have an Outlook item (like an e-mail message) open in a separate window, the Backstage view will look like this:



Let's look at these commands.

Info	Provides commands to restrict permission to the item, move the item, resend or recall a message, and view message properties.
Save/Save As	Save the currently selected item as a separate file outside of Outlook.
Save Attachments	Save attachments to the currently selected item as separate file(s) outside of Outlook. Only available if the selected item has attachments.
Print	Set print options for the selected item and print preview it.
Close	Close the current Outlook object window.
Office Account	Modify the settings for the account that you are using to log into Office.
Options	Opens the Outlook Options dialog.
Feedback	Opens the Windows Feedback app.

To close Backstage view, click File again or click any of the tabs.

THE MAIL WORKSPACE

When you first open Outlook 2016, the Mail workspace will be displayed by default. This is where you can view and work with any messages that you receive. You will typically spend the bulk of your time in this workspace:

· 昭 ち Ŧ		Inbox - jsmith@acmewidgets.onmicrosoft.com - Outlook 🛛 🗖 🚽 🗆 🗙
File Home Send / Receive		
New New Email Items *	Reply Reply Forward More *	Create News Toreste News T
New Delete	Respond	Jurick Steps G Move Tags Find Add-ins
a ravontes	Search Current Mailbox (👂 Current Mailbox 👻	€ Reply E Reply All € Forward
InDox 4	All Unread By Date * Newest 4	O msftconn@microsoft.com John Smith Mon 9/21
Sent Herry	✓ Last Week	Program Closing - Office 2016 for Windows will be broadly available on September 22!
Drafts	msftconn@microsoft Program Closing - Office 20 Mon 9/21	Bing Maps
▲ jsmith@acmewidgets.onmicr	4 Older	
Inbox 4	OneNote Team	
Drafts	Welcome to OneNote 7/31/2015 Get OneNote for free on all	
Sent Items		
Deleted Items 2	There are more items in this folder on the server	
Clutter	Click here to view more on Microsoft Exchange	You are receiving this small as part of the Office Pro-Release Program for the Office Proving
Conversation History		To a de receiving one email as part of the office Treatenese Trogram for the office Treaten
Junk Email		Hello John:
Outbox		Office 2016 for Windows will be broadly available on September 221
haa reeus		
b Groups		For the past many months you have engaged with us to help make Office 2016 the best Office ever! We would like to thank you for your participation in the Office 2016 Preview for Business program.
		What to expect:
		At this time, we will be closing this program on both Connect and Yammer. If you are an active Office 365 subscribe on ging. <u>Belaces</u> , and you have Office 2016 Preview installed, you are all set. You will continue to receive the talest Office 2016 organizes at they arrive (you have any questions regarding First Belaces, plase check with you'l' Admin). If you have the Trial vestion of the Preview installed, you will need to either purchase Office 2016 by your trial's end date by clicking on the <u>Bay</u> <u>Naw</u> link. On uninstall the Preview by going to your Control Panel's Programs and Seatures and selecting Uninstall, then install your licensed version of Office.
as 🖄 …		For more information and quidance on getting ready for Office 2016, view the TechNet article here. You can continue to report issues and receive
Items: 8 Unread: 4		All folders are up to date. Updating address book. Connected to: Microsoft Exchange 🔲 🗐 – 👘 🕂 100%

You will see that the messages in your account will be stored in a variety of different mail folders. You can find these folders inside the Navigation pane.

MAIL FOLDERS

The mail folders that appear inside the Navigation pane by default typically include the following:

▲ jsmith@acmewidgets.onmicr
Inbox 4
Drafts
Sent Items
Deleted Items 2
Clutter
Conversation History
Junk Email
Outbox
RSS Feeds
Search Folders
▷ Groups

Let's look at some of these mail folders.

Inbox	This is where new mail is received.
Drafts	Unsent messages can be saved here.
Sent Items	After a message is sent, a copy of it is stored here.
Deleted Items	This folder acts like the Recycle Bin in Windows. When you delete an Outlook item, it goes here first. To permanently remove the items in your Deleted Items folder, click Folder \rightarrow Empty Folder while in the Deleted Items folder.

Clutter	E-mail that has been identified as less important based on your reading habits will be moved to this folder. Typically this will include items such as newsletters or other mailing lists. Only available with Office 365 customers.
Conversation History	This folder will list conversation history for any contacts that you have interacted with using Microsoft Lync or Skype for Business.
Junk E-mail	E-mail marked as junk will arrive here.
Outbox	Messages you have created are stored here while Outlook connects to the server and sends the message.
RSS Feeds	Live feeds are stored here.
Search Folders	You can customize these folders to update based on search criteria.
Groups	Access shared workspaces. Only available with Office 365 accounts.

READ AND UNREAD MESSAGES

When you receive new messages, the folder that contains them will appear bold within the Navigation pane and a counter identifying the number of unread messages will be displayed adjacent to it:

 jsmith@acmewidgets.onmicr
Inbox 5
Drafts
Sent Items

In the working area, an unread message will also be represented by bold text, but that text will also be coloured and you will also see a colored line along the left of it:

msftconn@microsoft.... Program Closing - Office 2... Mon 9/21

Read messages do not have the bold effect or the line:

msftconn@microsoft.... Program Closing - Office 20... Mon 9/21

MESSAGE ICONS

Messages inside the working area may include one or more message icons. Each message icon is used to represent information about the associated message. For example, here you can see a flag icon that indicates this message has been flagged for follow-up:

OneNote Team Welcome to OneNote 7/31/2015 Get OneNote for free on all

Here is a breakdown of the various message icons that you might spot inside a message in the working area:

Replied To	Q.	The message has been replied to.
Forwarded	e,	The message has been forwarded.
High Importance	!	The message is important and probably time sensitive.
Attachment	0	The message includes an attachment.
Flagged for Follow-Up	►	The message has been flagged for follow-up later.

THE CALENDAR WORKSPACE

The Calendar workspace is used to add, remove, and manage events in the Outlook calendar. You can open this workspace by clicking the Calendar button at the bottom of the Navigation pane:



When open, you will see that the Calendar workspace is comprised of the Navigation pane and the calendar itself:

File Home Send/Receive	Folder View 🖓 Tell (ne what you want to do	enionaar – jumis Milaomewidgeb.	annine sourcenh - Outbook			
Now Now Now Now New Stop Meeting	e Today Next 7 Day Days Ing Go To ra	Werk Week Manth Schedule View Anange rs	Open Calendar Calendar - Groups - Manoge Calendar	Share Publish Calendar Calendar Online - Permissions Share	Find		
October 2015 F Control of the second s	 October 20 	15	Washington, D.C. +	G7°F/51°F	omorrow Saturday 7°F/51°F G3°F/61°F	Search Calendar (Ctri+E)	
Z/ 25 29 30 1 Z 3	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 50 31	Sep 27	28	29	30	Oct 1	2	3
November 2015 SU MO TU WE TH FR SA 1 2 3 4 5 6 7	4	5	6	1	8	9	10
6 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 20	* 100	13		14	15	16	17
6 7 8 9 10 11 12	ni stpi in	12	15	14	13	10	
< My Calendars	Past						
Calendar Other Calendars		19	20	21	22	23	24
	25	26	27	28	29	30	31
S 54 (2) ···							

The Navigation pane shows the current month and allows you to scroll through the months of the year. Clicking on a date in the mini calendar in the Navigation pane will display it in the working area using the current calendar view.

THE PEOPLE WORKSPACE

The People workspace is used to add, remove, and manage any contacts that you have. You can open this workspace by clicking the People button at the bottom of the Navigation pane:



When the People workspace is open, you will see that it is comprised of the Navigation pane, the working area, and the Reading pane. The Navigation pane will list all the folders that are used to organize your contacts, while the working area is where individual contacts are listed.

The Reading pane will show you the details of the selected contact:



ADDITIONAL OUTLOOK TOOLS

Aside from the Mail, Calendar, and People workspaces, you also have access to other a few Outlook tools and workspaces:



Here is a breakdown of the tools that are available to you:

- **Tasks**: In the Tasks workspace, you can assign tasks to yourself, as well as other people that you have connected with. Any tasks that are listed here will also appear inside the To-Do Bar while working with Outlook.
- **Notes**: The Notes workspace allows you to record quick notes that you want to keep track of. You can then organize these notes using categories and a variety of other features.

Ρεεκς

The Peeks feature allows you to "peek" at the contents of the Calendar, People, or Tasks workspaces of Outlook without having to go through the process of opening them up entirely. For example, if you want to have a quick look at any tasks you have scheduled for today, you could use the Peeks feature, rather than opening the entire Tasks workspace.

To use Peeks, place your cursor over the Calendar, People, or Tasks commands at the bottom of the Navigation pane. For example, here you can see that the cursor has been placed over the People command. The pop-up that appears lists all your favorite contacts that can then be interacted with:



ACTIVITY 1-1

Navigating the Outlook Interface

You are just getting started with Outlook 2016. You would like to explore its interface to get a feel for how it works and where everything is. Note that Outlook must be configured with an e-mail account before students can complete this activity.

1. Type "Outlook 2016" into the search box on the Windows 10 taskbar:



(If you are using Windows 8, start typing at the Start screen to search.)

2. Click the entry for Outlook 2016 to start the program:



3. Microsoft Outlook 2016 will open with the Mail workspace displayed:



(You will see different messages in your e-mail inbox than those that are shown here.)

4. Click the Folder tab at the top of the screen:

	÷ č	:						Inbox - jsmith	@acmew
File	Home	Send / R	leceive	Folder	View	2 Tell me wha	t you want to do		
New Ne Email Item		lgnore Clean Up + Junk +	X Delete	Reply F	Reply Forward	📴 Meeting	Move to: ? Team Email & Reply & Delete	 G Manager ✓ Done ✓ Create New 	
New		Delete			Respond		Quid	k Steps	E.

5. Review the various groups and commands that make up this tab:

				Int	oox - jsmith@	acmewidget	s.onmicrosoft.	com - Outlook	k
File	Home	Send / Receive Fold	er View Q	Tell me what you want to do					
New Folder	New Search Folder	Rename Folder Relete Folder	Mark All Run Rules as Read Now	A ↓	Show in Favorites	View on Server	AutoArchive Settings	Folder Permissions P	Folder Properties
	New	Actions		Clean Up	Favorites	Online View		Properties	

6. Click the Calendar command in the Navigation pane:

		22	Ż	•••	
Items: 9	Unr	ead: 4			

7. The Calendar workspace will now be displayed with the Month view applied:

File Home Send / Receive Folder View 🗘 Tell me what you want to do	
Non- Non- <th< td=""><td>~</td></th<>	~
October 2015 Washington, D.C October 2015 Washington, D.C October 2015 Washington, D.C October 2015 Washington, D.C October 2015 October 2015	P
27 28 29 30 1 2 3 SUNDAY MONDAY TUESDAY WEDNESDAY THURSDAY FRIDAY SATURDAY	-
4 5 6 7 8 9 10 11 12 13 14 15 16 17 15 19 20 21 22 23 24 25 15 27 28 29 30 Oct 1 2 23 28 29 30 Oct 1 2 23 29 30 Oct 1 2 23 29 30 Oct 1 2 23 29 30 Oct 1 2 23 20 30 Oct 1 2 2 3 20 30 Oct 1	
November 2015 4 5 6 7 8 9 10	
UD DO 10 ME 11 HE 34. 1 2 3 4 4 5 6 7 3 6 10 11 11 10 10 20 11 11 2 7 15 4 4 10 10 20 11 11 1 2 7 15 4 10 10 20 11 11 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	->I
2 10 1 2 3 4 5 6 7 8 9 10 11 12 AMy Calendars 12 13 14 15 16 17 17	Next Apps intment
Calendar	
Other Calendars	
25 26 27 28 29 30 31	
Item: 0 All folders ere up to date. Connected to: Microsoft Exchange 🔲 🔐	► 100%

8. Click People in the Navigation pane:

\sim		<u>23</u>	Ż	•••
Items: (D	3		

9. The People workspace will now be displayed. Any contacts that you have will be listed in the working area. If you have any contacts, the details of the first item will be shown in the Reading pane:

醫 5 =	Contacts - junith@ucmexidgets.onmicrosoft.com - Outlook
The Profile Month Sector Total Very Very Terminal And You with 10 200.	Ced Phone List Phone Phone List Phone Phone Phone Phone Phone Phone
My Contacts Suppe for havines: Contacts Contacts Contacts Contacts Contacts Contacts	Jane Smith
	CONTRACT NOTES Calendar View Source Contract (Contacta) Calenda (Source) Calenda (Source) Calenda (Source) Calenda (Source) Calendar (Sour
Items: 1	All folders are up to date. Connected to: Microsoft Exchange 🔲 🖤 – — + 100%

10. Now click the Tasks button in the Navigation pane:



11. In the Tasks workspace, you will see any tasks that you have ongoing. You will also see tools to organize those tasks:

S 5 +		To-Do List - ja	mith@acmewidgets.onmicrosol	.com - Outlook		œ – ⊡ ×
File Home Send / Receive	Folder View Q Tell me what	you want to do				
New New New Delete New Delete	Reply Forward Mark All Respond	Remove te from List age Task Follow Up	Week ate Detailed Simple	List To-Do List Prioritized =	Move OneNote Actions Tags	e BAddress Book
4 My Tasks				Search To-Do List (Ctrl+E)		P
To-Do List	TASK SUBJECT	START DATE	REMINDER TIME	DUE DATE	IN FO CATEGORIES	章 ヤ
Tasks	Click here to add a new Task					
	4 📔 Flag: Due Date: Tomorrow					
	Welcome to OneNote	Fri 10/2/2015	None	Fri 10/2/2015	Inbox	►
a 🛛 🖉 …						
Fifter applied				All folders are up to date.	Connected to: Microsoft Exchange	

12. Click the File tab and click Exit to close Outlook and complete this activity:

TOPIC B: Perform Basic E-mail Functions

Now that you have familiarized yourself with the Outlook 2016 interface, you can start using this application to communicate with others. Over the course of this topic, you will learn about basic email functionality in Outlook.

Topic Objectives

In this topic, you will learn:

- About the Message form
- About the ribbon tabs available in the Message form
- About inline replies
- How to reply to and forward messages
- How to print a message
- How to move messages
- About the Deleted Items and Clutter folders

THE MESSAGE FORM

The Message form will be displayed when you create a new e-mail message, which you can do by clicking Home \rightarrow New Email:



(You can also use the Ctrl + N shortcut when you are in the Mail workspace.)

Once open, you will see that it includes a variety of different fields that you can use to compose the new message:

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Solution B J U V A A E<	
Image: Text Control Sext Text Image: Text Control Image: Text Control Text Control Image: Text Control Text Control Text Control Text Control Text Control Image: Text Control Text Control Text Control Text Control Text Control Image: Text Control Text Control Text Control Text Control Text Control Image: Text Control Text Control Text Control Text Control Text Control Image: Text Control Text Control Text Control Text Control Text Control Image: Text Control Text Control Text Control Text Control Text Control Image: Text Control Text Control Text Control Text Control Text Control Image: Text Control Text Control Text Control Text Control Text Control Image: Text Control Text Control Text Control Text Control Text Control Image: Text Control Text Control Text Control Text Control Text Control Image: Text Control Text Control Text Control Text Control Text Control Image: Text Control Text Control Text Control Text Control Text Control Image: Text Contre Text Contr	
B Sc. Subject Subject	
3 Cc. Subject	
Suget	

To begin, type the e-mail address(es) of the recipient(s) into the To or Cc fields:



Typically, you will enter any primary recipients into the **To** field, while secondary recipients who are not necessarily expected to reply to the message are entered into the **Cc (carbon copy)** field. The **Bcc (blank carbon copy)** field is used when you would like to copy a recipient on the message but hide their address from any other recipients. (This field is hidden by default. To display or hide this field, click Options \rightarrow Bcc.)

The next item that you will need to fill out is the **Subject** field. This where you enter a single line that describes the message that you are sending:



Finally, and most importantly, enter the content of your message into the large text area that dominates the Message form:

Untitled - Message (HTML) Q Tell me what you want to do	□ - □ ×
♦ Address Check Names Nam	
	Lindid- Accase (1971) Carl and a power factor Carl and a power factor

MESSAGE FORM TABS

Just like when working with the primary Outlook 2016 window, the Message form includes a set of six ribbon tabs that contain relevant command groups:

H		5 č		Ŷ	ψ	÷				U	ntitled -	Message	e (HTML)		
File		Message	1	nsert	Optio	ns	Format Text	Review	♀ Tell me	e what yo	ou want t	to do			
Paste) 1 1 1	Cut Copy Format Pair	nter	BI	Ť.	al <u>y</u> -	→ A A = = =		Address Book	€ Check Names	Û Attach File ▼	Attach Item •	Signature •	 Follow Up * High Importance Low Importance 	Office Add-ins
	Clip	board	5			E	lasic Text	5	Nam	ies		Includ	e	Tags	Add-ins

Here is an overview of each tab:

- File: Clicking this tab will display Backstage view. While working with the message form, Backstage view will include options to set the properties for the message and restrict permissions for this item.
- Message: In the Message tab, you will find basic editing tools that you can use to format text, as well as add items like attachments or signatures. Additionally, you will find commands to tag the message with a priority level or follow-up flag.
- Insert: The Insert tab includes a variety of commands that you can use to insert objects into your message. This includes objects like Outlook items (such as meetings), file attachments, tables, illustrations, and more.
- Options: In the Options tab, you will see commands that will allow you to apply themes to your message, as well as enable message options. For example, you can toggle the Bcc field on or off, as well as request delivery and read receipts.
- Format Text: As the name suggests, the Format Text tab contains commands that are used to format the text in the body of the message that you are composing. This includes commands to apply text effects, change the font style, and modify paragraph alignment.
- Review: The Review tab includes commands that are intended to be used after you have composed the message. You will find commands to check your spelling, open the Insights pane, use the thesaurus, and modify language settings.

INLINE REPLIES

While reading a message in the Reading pane, you can create an inline reply by clicking Home \rightarrow Reply (or pressing Ctrl + R) or Home \rightarrow Reply to All. This will allow you to reply to the message in question directly inside the Reading pane:

S •	Compose Tools	Inbox - jsmith@acmewidgets.onmicrosoft.com - Outlook 🛛 👘 🗆 🖂 🗙
File Home Send / Receive	Folder View Message 🖓 Tell me wha	
A Cut Copy Paste Format Painter Cipboard	11	Long Annon Supporter Anno Anno Anno Anno Anno Anno Anno Ann
▲ Favorites	Search Current Mailbox (🔎 Current Mailbox 🔹	Pop Out × Discard
Inbox 4	All Unread By Date * Newest 4	To Take Golds - relevable shock news
Clutter	▲ Today	
Sent Items Drafts	(Draft) John Smith Joe's Retirement 1:25 PM Hey all, Joe is going to be	Send Cc. REJOC'S Retirement
▲ jsmith@acmewidgets.onmicr	4 Two Weeks Ago	
Inbox 4	msftconn@microsoft	
Drafts	Program Closing - Office 20 9/21/2015	From: John Smith (mailto:abcwidgets@outlook.com) Sent: Monday. October 5: 2015 1:25 PM
Sent items	4 Older	To: John Smith smith@acmewidgets.onmicrosoft.com
Deleted items 4 Clutter Conversation History	OneNote Team P Welcome to OneNote 7/31/2015	Subject Joe's Retirement Hey all,
Junk Email Outbox	There are more items in this folder on the server Click here to view more on Microsoft Exchange	Joe is going to be retiring soon, so I thought we could throw a small celebration. Please let me know your availability for next week. Thanks.
D Search Folders		
> Groups		John
Tensi 9 Unicest 4		All folders are unit a date. Connected for Microsoft Evitance

(You can also create an inline forwarded message by clicking Home \rightarrow Forward.)

You can open the inline reply or forward in a separate window by clicking the Pop Out button that appears just below the Send button:

	То	John Smith <abcwidgets@outlook.com></abcwidgets@outlook.com>
send	Cc Subject	RE: Joe's Retirement

You can cancel the reply and discard the message that you are composing by clicking the Discard button. Or, if you have finished composing your response, click the Send button. Back in the Inbox, you will see a message icon that indicates that it has been replied to:



The Compose Tools – Message Tab

When composing an inline reply (or forward), the Compose Tools – Message tab will be shown on the ribbon:

P	÷ ک				Compose Tools		Inbox - jsmith@	acmewidgets.onmicrosof	ft.com - Outlook	
File	Home	Send / Receive	Folder	View	Message	♀ Tell me wha	t you want to do			
Paste	X Cut E Copy ≮Format Pai	Calibri (Bo	oc ▼ 11 ▼ / J at × A	• ■ =		Address Check Book Names	Attach Attach Signature File * Item * *	 ! High Importance ↓ Low Importance 	Bcc From	Office Add-ins
	Clipboard	Fai	Basic	Text	G.	Names	Include	Tags 🖓	Show Fields	Add-ins

This tab includes the following seven groups:

- Clipboard: This group includes cut, copy, and paste commands, as well as the Format Painter command.
- Basic Text: All the basic text formatting commands are included in this group. This includes text effects, font settings, alignment, and more.
- Names: Access the Address Book and check the names and e-mail addresses that you have entered.
- Include: Attach or include items in your message.
- Tags: Assign the message a high or low importance level.
- Show Fields: Toggle the Bcc or From fields on or off in the inline reply/forward form.
- Add-ins: Access the Office Add-ins manager.

REPLYING TO MESSAGES

If you are already viewing the message in a separate window, you will find both the Reply and Reply All commands on the Message tab:



No matter whether you click Reply or Reply All, you will see the full-screen Message form displayed with the e-mail addresses for the recipients who will receive your reply, as well as the original message in the main message body. You will also notice that the Subject field includes the subject line from the original message that you received, but preceded by "RE:" indicating that this is a reply:

🔒 5 7 1 🕴 🕫 RE: Joe's Retirement - Message (HTML)	. – . ×
File Message Insert Options Format Text Review 👰 Tell me what you want to do	
Patt Calibri (Gorv IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	~
To Zehn Smith - advoxidoets Bourdook.com. Send Cc Subject RE: Joe's Retirement	
From: John Smith [mailto:abcwidgets@outlook.com] Sent: Friday, October 2, 2015 1:37 PM To: John Smith Subject: Joe's Retirement Hey all, Joe is going to be retiring soon, so I thought we could throw a small celebration. Please let me know your availability for next week.	
Thanks,	
John	

After composing your response, click the Send button. Back in the Inbox, you will see a message icon that indicates that it has been replied to, just as when composing an inline reply.

FORWARDING MESSAGES

If you want to send the original message that you received to another recipient, click Home \rightarrow Forward:



This will open an inline forwarding window in the Reading pane. Enter the message details and click Send.

If you've opened the message, click Message \rightarrow Forward:



You will then see the Message form with the original message in the main body. Just like when sending an original message, you need to fill in the message recipients using the To, Cc, or Bcc field (if it is enabled):

🖬 🕤 🔿 🕆 🦊 🕫 FW: Joe's Retirement - Message (HTML)	• –	
File Message Insert Options Format Text Review Q Tell me what you want to do		
Parte Copy B I II II II II II III III IIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII		~
To [Send Subject Subject FW: joe's Retirement		
Attached Schedule.docx		
From: John Smith [mailto:abcwidgets@outlook.com] Sent: Friday, October 2, 2015 1:37 PM To: John Smith <jsmith@acmewidgets.onmicrosoft.com> Subject: Joe's Retirement Hey all, Joe is going to be retiring soon, so I thought we could throw a small celebration. Please let me know your availability for next week. Thanks, John</jsmith@acmewidgets.onmicrosoft.com>		

You will also see that the subject field includes the original subject, but the abbreviation "FW:" precedes it. This is to help the recipient understand that this is a forwarded message. Once you

have addressed the forwarded message and added any comments to the main body of it, click the Send button.

Back in the Inbox, you will see an icon that indicates the message has been forwarded, regardless of which method has been used:



You will also see a message in the Reading pane and in the full-screen message indicating when you forwarded it:

						Joe's Retirement - Message (HTML)									×				
File	Messag	e 🤉	? Tell n	ne what y	ou want to do														
ि ignore Sunk≁	X Delete	Reply	Reply All	Forward	Meeting	Move to: ? Team Email Reply & Delete	G To Manager ✓ Done 梦 Create New	4 ×	Move	💼 Rules + 🔊 OneNote ⊡ Actions +	Mark Unread	Categorize	Follow Up *	Translate	P Find ■ Related ~ ⇒ Select ~	Zoom			
Delet	e			Respond		Quic	k Steps	G		Move		Tags	Fai		Editing	Zoom			~
Tou for	John S Joe's I warded ti	imith < Retiren	abcwi nent age on ⁻	dgets@ 10/5/2015	Poutlook.com 5 1:21 PM. 🗲	1> John Smith											D	1	Fri 10/2
Sch 11	Schedule.docx																		
Action It	ems																+ (Get more	e apps

The forwarded item will be saved in the Sent Items folder and accessible in the conversation thread.

PRINT OPTIONS

To print an item, first ensure that it is selected. (For example, you could click an e-mail in your Inbox.) Or, you can open the item. In either case, click File \rightarrow Print:



With the Print category selected in the Backstage view, you are given the option to modify various print options:

¢	Inbox - junith@acmevidgets.onmicrosoft.com - Outlook ? - □ X
Erris Info Open & Espan Save As Destantement Office Account Options Feedback Erri	Inter-juntil@exemenidget.com/croated.com - Outload
	(] et) 32 32

The options that you will see will depend on the type of item that you are printing. However, you will always have access to the Printer drop-down command to choose a printer:



For additional options, click Print Options:



This action will display the Print dialog box:

Print			×
Printer Name: Status: Type: Where:	Brother Laser#:6 TP Output Gateway		Properties Print to file
Print style Page range All Pages: Type page I commas co example, ty	Table Style Memo Style	Page Setup Define Styles anges separated by the item. For	Copies Number of pages: All V Number of copies: Collate copies
Print option Print att default	ns ached files. Attachmen printer only.	ts will print to the Print	Preview Cancel

This dialog box lets you choose advanced options, such as page range and number of copies. There are also six other buttons in this dialog, which perform the following commands:

- **Properties**: Opens the Properties dialog for your printer.
- Page Setup: Allows you to change the format, paper, header, and footer for the printout.
- **Define Styles**: Allows you to change the format for all future printouts of the selected style.
- **Print**: Send the item to the printer.
- **Preview**: Return to the Print category to preview the item.
- **Cancel**: Return to the Print category with no changes saved.

In addition to print options, the Print category of Backstage view also displays a print preview. This preview will give you an idea of how the currently selected item will look on a printed page using the current settings:

e		Inbox - jsmith@acmewidgets.onmic	crosoft.com - Outlook		? – 🗆 X
Construction	Print Terr Print Pri	Inder - jonik Birtmeniget some	no senti Termina de la consecuencia de la consecue	mbenaner 19 1 sin	7 - o x
		1 of 1 >		1	B 63 III

When you are ready to print the currently selected item, click the Print command:



MOVING MESSAGES

Messages that appear within your mailbox can be moved between any folders, as necessary. To move a selected message in the working area, click Home \rightarrow Move \rightarrow Other Folder:

∰ 5 ∓	D + Inbox - jsmith@acmewidgets.onmicrosoft.com - Ou				
File Home Send / Receive	Folder View 🛛 Tell me wha	t you want to do			
Image: New New Email Items + Image: Clean Up + Delete	Reply Reply Forward More *	Move to: ? G To Manager Team Email J Done Reply & Delete T Create New	4 > 	Move Rules OneNote Unread/ Categorize Follow Read Up+	
New Delete	Respond	Quick Steps	E.	Inbox - Outlook Data File	
				Qther Folder Copy to Folder Always Move Messages in This Conversation Move to Clutter	

This action will display the Move Items dialog box where you are able to select the destination folder. Click OK to complete the move:

Move Items	×
Move the selected items to:	
✓ ∑ jsmith@acmewidgets.onmicrosoft.co ∧	ОК.
Inbox (4)	
📝 Drafts	Cancel
📻 Sent Items	
Deleted Items (4)	New
Calendar	
Clutter	
> 💵 Contacts	
Conversation History	
🔁 Journal	
🐻 Junk Email	
- Notes	
🕞 Outbox 🗸	
< >>	

(Once you have selected a folder from this dialog box, it will be accessible directly from the Move menu.)

Alternatively, you can drag and drop messages directly from the item list to the destination folder in the Navigation pane:



THE DELETED ITEMS FOLDER

Any messages in Outlook can be deleted by selecting them from inside the message list and then clicking Home \rightarrow Delete:



When an item is deleted, it is placed inside the Deleted Items folder. To open this folder, click the Deleted Items folder within the Navigation pane:

▲ jsmith@acmewidgets.onmicr				
Inbox 4				
Drafts				
Sent Items				
Deleted Items 4				
Clutter				

The contents of the Deleted Items folder will then be listed inside the working area. From there, you can complete the same process as described above to permenantly delete any messages inside this folder.
To delete all of the messages in this folder, right-click on the Deleted Items folder and click Empty Folder:



Or, click Folder \rightarrow Empty Folder:



A dialog box will then be displayed that asks you to confirm your choice to delete all of the items inside the Deleted Items folder. Click Yes to complete the action:

Microsof	t Outlook	×
	Everything in the "Deleted Items" folder will be permanently delet Continue? Yes No	ed.

THE CLUTTER FOLDER

Office 365 users have access to the Clutter folder. This is where low-priority messages are automatically moved based on your previous reading behavior. For example, if you generally wait a long time before reading a newsletter that you subscribe to, those messages will typically be filed into the Clutter folder:

聞 う マ Eile Home Send / Receive	Folder View 0 Tell me what you want to do	Clutter - jsmith@acmewidgets.onmicrosoft.com - Outlook	□ - □ ×						
New New Email Items - Wolf Clean Up - Delete	Reply Reply Forward More - All Respond	Done Create New Wark Stress Move Move Move Move Move	Search People						
▲ Favorites < Inbox 4 Clutter Sent Items	Search Clutter (Ctrl+E) Current Folder - All Unread By Date * Newest ↓ ✓ Last Month Microsoft Outlook	C2 Reply (C2 Reply All C3 Forward Microsoft Outlook Ath Swith What is Clutter?	9/1/2015 *						
Jimitit@acnewidgets.onmicr Inhor 4 Drafts Sent Items Detect Items Detect Items Detect Items Detect Items Outbor Conversation History Junk Graal Outbor PSS Fedat SanchFedat SanchFedat	With the grant region of your entail	Toyoff Outlook Stocker Stocke							
) Groups		If you would die Cleffe to this proving missigner of of your miss, you can <u>an an Upper</u> and then This yourse wolfdicates then an owear resurge and you can't right to k.	Connected to Monosoft Lubanes						

While this feature is useful for keeping your Inbox populated with only the more important messages, it is generally a good idea to check this folder for any messages that have been improperly categorized.

ACTIVITY 1-2

Performing Basic E-mail Functions

Before students begin this activity, have them follow these steps to open the Lesson 1.pst file in their Exercise Files folder.

- Click the File menu, click Open & Export, and click Open Outlook Data File.
- Browse to Lesson 1.pst in the Exercise Files folder. Click OK.

Students should pair up with another classmate for this activity.

1. To begin, open Outlook 2016. Ensure that the Inbox folder in the Outlook Data File is displayed:



2. If it is not selected already, click to select the message with the subject line "Celebrating Joe's Retirement." Review this message inside the Reading pane:

- San			
File Home Send / Receive			
New New Email Items - Dukets	Reply Reply Forward To More v All Reply Reply AD Learning	To Munager Done Create New v Create New v Move Rules OneNote Unread/ Categorize Follow Read	Search People
∡ Favorites <	Search Inhov (Ctri+E)	A Parala & Parala All A Faranand	
Inbox 4	All Harand Substant Harvet	Icho Smith cabouideatr@outlook.com>	West 0.00
Clutter	A Last Week	Celebration loe's Retirement	1100 0.50
Sent Items	Iohn Smith	carating recontainent	~
Drafts	Celebrating Joe's Retirement Wed 9/30 X Hey all, Joe is going to 💦	Hey all,	
> jsmith@acmewidgets.onmicr	▲ Last Month	log is going to be satisfied soon, so I thought up sould through a small	I colobration Blassa lat ma know your availability for next weak
 outlook data file Deleted items 	OneDrive Add shared folders to your 9/4/2015 Sync shared folders to your	Thanks,	r celebration, Please let the know your availability for their week.
Archive	4 Older	John	
Drafts Inbox 2	John Smith Invitation to OneNote note 3/26/2015 Click to open the notebook		
Junk E-mail			
Outbox			
RSS Feeds			
Sent Items			
Sync Issues 4			
Search Folders			
≥ ≥≊ 🖾			
Items: 3 Unread: 2			UI - + 1095

3. Forward this message to your partner by clicking Home \rightarrow Forward:



4. The Message form will be displayed with the original message shown in the body. Above the separating line in the body, type the following message: "Hey [partner name]. Just so you know we are throwing Joe a retirement party and I thought you should come."

· 图 ち ÷	Campose Tools	Inbox - Outlook Data File - Outlook	• • • ×							
File Home Send / Receive	Folder View Message 🖓 Tell me what y									
A Cut Calibri (Boc Paste Format Painter Clipboard 5	· 11 · A* A* III · III · III · A* 22 · ▲ · ■ □ □ □ □ □ □ □ □ A Basic Text □ Names	Image: Second	^							
4 Favorites	Search Inbox (Ctrl+E) 🔎 Current Folder +	Pop Out 🗙 Discard								
Inbox 4	All Unread By Date * Newest 4	Te								
Clutter	4 Last Week									
Sent Items Drafts	[Draft] John Smith Celebrating Joe's Retirement Wed 9/30 Hey all, Joe is going to be	Send Subject TW: Celebrating Joe's Retirement								
> jsmith@acmewidgets.onmicr	▲ Last Month	Hey Jane. Just so you know we are throwing Joe a retirement party a	and I thought you should come.							
✓ outlook data file Deleted Items	OneDrive Add shared folders to your 9/4/2015 Sync shared folders to your	From: John Smith (mailto:abcwidgets@outlook.com) Sent: Wednesday, September 30, 2015 7:43 AM To: John Smith <jsmith@acmewidgets.onmicrosoft.com></jsmith@acmewidgets.onmicrosoft.com>								
Archive Drafts Inbox 1	John Smith Imitation to OneNote note 3/26/2015 Click to open the notebook	Subject: Celebrating Joe's Retirement Hey all,								
Junk E-mail		Joe is going to be retiring soon, so I thought we could through	a small celebration. Please let me know your availability for next week.							
Outbox		Thanks.								
RSS Feeds										
sent items		John								
P Sync Issues 4										
Search rolders										
Marca 2 1 and 2 and										
itera y oração i			- LL up - L + 1008							

5. Inside the To field, type the e-mail address of your partner:



6. Fix the typo in the original message:



Send Su	To jane@example.org Cc jubject FW: Celebrating Joe's Retirement							
Hey Jane.	Just so you know we are throwing Joe a retirement party and I thought you should come.							
From: Joh Sent: Wed To: John S Subject: C	From: John Smith [mailto:abcwidgets@outlook.com] Sent: Wednesday, September 30, 2015 11:43 AM To: John Smith <]smith@acmewidgets.onmicrosoft.com> Subject: Celebrating Joe's Retirement							
Hey all,								
Joe is goii know you	Joe is going to be retiring soon, so I thought we could throws small celebration. Please let me know your availability for next week.							
Thanks,								
John								

7. Now that you are ready to send the message, click the Send command:



8. Review the message that you received and then close Microsoft Outlook to complete this exercise.

TOPIC C: Use Outlook Help

While Outlook has been designed with ease of use in mind, there may come a time when you need some help finding a specific feature or learning about how some options work. Over the course of this topic, you will learn how to find help in Outlook.

Topic Objectives

In this topic, you will learn:

- How to use the Tell Me feature
- How to access advanced help options

USING TELL ME

Microsoft Outlook 2016 features a new natural language help feature. To take advantage of it, type your question in the text box by the ribbon tabs:



As you type, you will see various links to the related topic:



At the top, you will usually see shortcuts to **related commands (1)**. (If a command is greyed out, it means that it is not currently available.) Next, you will see an option to open the **traditional Help window (2)**. Finally, there is usually an option for **Smart Lookup (3)**, which will search for the term(s) using the Insights feature.

ACCESSING ADVANCED HELP OPTIONS

When you choose a "Get Help" entry from the Tell Me results menu, you will see the traditional Help window:



(You can also use the F1 shortcut to open the default page of the Help file.)

In the top right-hand corner, you will see the **Minimize**, **Maximize/Restore**, and **Close buttons (1)**. Also at the top is the **Help toolbar (2)** and **search bar (3)**. The main part of the window shows the **main help content (4)**. You can browse through the help content by clicking the blue text, called a **hyperlink**.

This text is linked to relevant information. For example, the "Print a blank calendar" link will show content that explains how to print a blank calendar without any meetings or appointments:

You can perform a new search for help information in the Help window by typing keywords into the search bar and pressing Enter. After a moment, any results Outlook thinks are relevant will appear in a list. Click one of the topics in that list to view more information about it.



The Help Toolbar

The Help toolbar contains commands like those you would find in a web browser. In fact, the Help window behaves very much like a web browser that only searches for information relevant to Outlook 2016.

Back	۲	Move back one step at a time through the help topics you have previously read.
Forward	۲	If you click the Back button, the Forward button will become active. This lets you step forward through the topics you have visited.
Home		Click this button to return to the default Help page.
Print	-	Prints the current topic.
Text Size	A	Make the text in the help file larger or smaller.

ACTIVITY 1-3

Getting Help in Microsoft Outlook 2016

A co-worker has provided you with some sales information. After you review it, you decide that you should send it to your manager, but you don't know how to add an attachment to an e-mail in Microsoft Outlook 2016.

1. To begin, open Outlook 2016. Ensure that your Inbox folder is displayed:



2. Click Home \rightarrow New Email:



3. The new message form will now be displayed in a separate window. Click inside the "Tell Me" field at the top of the ribbon interface:

⊟										Intitled - Message (H	ITML)		
File	N	essage	Ins	ert	Option	s Format Text	Review	♀ Tell m	ie wh <mark>a</mark> t y	ou want to do			
Paste	Cur Co For	y mat Paint	ter	B I		→ A → = =	- 1 - & = - -	Address Book	€ Check Names	Attach Attach Sig File v Item v	inature	 Follow Up * High Importance Low Importance 	Office Add-ins
	Clipboa	rd	Es .			Basic Text	5	Na	mes	Include		Tags 5	Add-ins

4. Type "attach:"



5. Click the "Get Help" link:



6. The full Outlook 2016 Help window will open. Click the "Attach a file to an email in Outlook 2016" link:



(If you do not see this link, you can choose any other article.)

7. Scan through this article. When you are finished, close the Help window:



8. Type "attach" in the Tell Me field once again:



9. This time move your mouse over the Attach File option. You will see a list of your most recently accessed files, as well as options to browse the files on your PC and online:



10. Click Browse This PC:



11. The Insert File dialog box will now be shown. Use its controls to browse the Exercise Files folder on your desktop. Find the Activity 1-3 file and click to select it. Click Insert:

🖃 Insert File					×
← → • ↑ 📙 « St	arting Files for Activities > Lesson 1		√ Č	Search Lesson 1	<i>م</i>
Organize 🔻 New fold	er			= = = =	- 🔳 🕐
🖈 Quick access 🔷	Name	Date modified	Туре	Size	
📃 Desktop 🛛 🖈	Activity 1-3	10/6/2015 1:15 PM	Microsoft Excel W	7 KB	
🕹 Downloads 🖈	📑 Lesson 1	10/5/2015 2:49 PM	Outlook Data File	513 KB	
🗄 Documents 🖈					
📰 Pictures 🛛 🖈					
Microsoft Outlook					
This PC					
E Desktop					
🗎 Documents					
🕹 Downloads					
👌 Music					
E Pictures					
Videos					
File n	ame: Activity 1-3		~	All Files	~
			Tools 🔻	Insert	Cancel

12. The selected file will now be attached to the current message:

H	5 ∂	*	.↓ =			Untitled - Me	ssage (HTML)			m	-	×
File	Message	Insert	Options	Format Text	Review	♀ Tell me what y	ou want to do					
Paste	X Cut ि Copy ♂ Format Pai	nter B	IU X	· A · ≡ ≡	- 1Ξ - � = 1Ξ 1Ξ	Address Check Book Names	Attach Attach Signature	 Follow Up * High Importance Low Importance 	Office Add-ins			
C	lipboard	r _{ia}		Basic Text	G,	Names	Include	Tags 🖓	Add-ins			^
۲ Send	To Cc											
	Subject											
	Attached	Ac 61	tivity 1-3.xlsx (B	*								

13. Close the message form window without saving the message and then close Microsoft Outlook 2016 to complete this exercise.

Summary

During this lesson you learned about the fundamental concepts behind Outlook 2016. You now know about e-mail, the Outlook 2016 interface, and the many workspaces that are available to you. You should now feel comfortable completing basic e-mail tasks, such as replying or forwarding e-mails, as well as reading messages that you receive. Finally, we wrapped up the lesson with information on using Outlook's help features.

LESSON 2: COMPOSING MESSAGES

Lesson Objectives

In this lesson you will learn how to:

- Create an e-mail message
- Check spelling and grammar
- Format message content
- Attach files and items to an e-mail message
- Enhance an e-mail message
- Manage automatic message content

TOPIC A: Create an E-mail Message

The most frequent tasks that you will complete using Microsoft Outlook will likely be creating and sending e-mail messages. The first step in this process is to choose who you would like to send the message to. To assist you in addressing an e-mail appropriately, you have access to the address book, as well as other features. Over the course of this topic, you will learn how to create and address an e-mail message.

Topic Objectives

In this topic, you will learn:

- About the address book
- About Microsoft Exchange Server
- About the Global Address List
- About MailTips

THE ADDRESS BOOK

As the name suggests, the address book in Outlook is a repository for contact information. It is populated by creating contacts manually, importing them from another application, or using the contacts that have been added by your organization.

To access the address book and use it to insert contact information while composing a new message, click the To, Cc, or Bcc (if enabled) buttons:

₿								Un	titled - Me	essage (H	ITML)					Ŧ		
File	Messa	ge	Insert	Option		rmat Text	Review	♀ Tell n	ne what y	ou want i								
Paste	👗 Cut 🗈 Copy 🖋 Format	Painter	В	T U al	- A	t a* ⊞ • • ≡ = =		Addres Book	s Check Names	Attach File *	Attach Sign Item *	ature	Follow Up	• rtance tance	Office Add-ins			
	Clipboard	r	ŝ		Basic 1	Text	5	Na	mes		Include		Tags	5	Add-ins			^
۲ Send	To Cc Subject																	

After clicking on any of these buttons, the Select Names dialog box will be displayed:

Select Names: Offline Global Addre	ss List	×
Search: Name only OMore co	olumns	Address Book
3	Go	Offline Global Address List - jsmith@acmev > Advanced Find
Name	Title	Business Phone Location
🍰 Jane Gibson		^
👗 John Smith		
<		>
To ->		
Cc ->		
Bcc ->		
		OK Cancel

The main text area of this dialog box will show all the **contacts (1)** that appear in your default contacts list. By clicking the **Address Book drop-down menu (2)**, you can choose the contacts list that you would like to display in this dialog box. (By default, this will be the contacts list that is associated with your current Outlook profile or e-mail address. If you are part of a larger organization, you may have access to an organizational contact list that is curated by your system administrator.)

Near the top left-hand corner of this dialog box, you will see the **Search field (3)**. By typing a name into this text box, you jump to a particular contact for quick access. This is especially useful when working with large contact lists.

To insert a contact from the address book into the message that you are composing, click to select the desired contact(s). Next, click the button (To, Cc, or Bcc) that is associated with the field that you want the contact(s) to be placed into. In the following example, the selected contact is being added to the To field:

Select Names: Offline Globa	l Address List	×
Search: Name only	More columns	Address Book Offline Global Address List - jsmith@acme\ ∽ Advanced Find
Name	Title	Business Phone Location
🔓 John Smith		
<		>
To -> 5		
		OK Cancel

(Note that you can select multiple contacts at once by holding down the Ctrl key on your keyboard and clicking on each contact.)

After having added contacts to the fields in which you would like them to appear in the message, click the OK button:

<		>
To ->	Jane Gibson	
Cc ->		
Bcc ->		
		OK Cancel

Back in the message, you will see the contact(s) that you selected appear in the appropriate fields:

	5 0	φ ψ	÷	Ur	ntitled - Message	(HTML)	- 10 S		Ŧ	-	×
	Message	Insert Option	s Format Text	Review Q Tell	me what you war	nt to do					
Paste	& Cut ∃ Copy ¥ Format Painter	B I U	× A* A* ∷ ⊻ × A × ≡ ≡ Basic Text	Addre	ss Check Atta Names File	ch Attach Signature them tem tem tem tem tem tem tem tem tem t	Follow Up * High Importance Low Importance	Office Add-ins			^
۲ ــــ ۴ Send	To Jan Cc	e Gibson 🔶									

A slightly different version of the address book can also be accessed at any time by clicking Home \rightarrow Address Book from the main Outlook window:

ŝ	5 -		Inbox - jsmith@acmewidg	gets.onmicrosoft.com - Outlook			
	Home Send / Receive	Folder View 🖓 Tell me wha	it you want to do				
New N Email Ite	New ems*	Reply Reply Forward More *	Move to: ? G To Manager Team Email V Done Reply & Delete Y Create New	Move Rules OneNote	Unread/ Categorize Follow Read v Up v	Search People	ore
New	Delete	Respond	Quick Steps	Fa Move	Tags	Find Add	d-ins

With this command, the Address Book dialog box will be displayed. This is very similar to the Select Names dialog box that appears when adding contact information to a new message; however the To, Cc, and Bcc fields do not appear. Otherwise, it has many of the same commands which you can use to find and manage existing contacts:

Address Book: Offline Global Addr	ress Lis	t		-		×
Search: Name only OMore colu	imns	Address Book				
	Go	Offline Global Addr	ess List - jsmith@acmev	~ /	dvanced	Find
Name	Title		Business Phone	Locat	ion	
🍰 Jane Gibson						~
👗 John Smith						
<						>

For example, to create a new contact, click File \rightarrow New Entry:

	Address Book: Offl	ine Global Add	Iress List
File	Edit Tools		
	New Entry	N	nns A
	New Message	Go	
	Add to Contacts		Title
	Delete	Ctrl+D	
	Properties		
	Close	Alt+F4	

Notice that you can also create a new e-mail message addressed to the selected contact with this menu.

ACTIVITY 2-1

Creating an E-mail Message

You would like to compose and send an e-mail message to a colleague in your organization. Students should pair up with another classmate for this activity.

1. To begin, open Outlook 2016 and ensure that the Inbox folder is displayed:



2. Click Home \rightarrow New E-mail:



3. A new message will be displayed:

File Message	↑ ↓ ∓ Insert Options	Format Text Re	Untitled - M sview Q Tell me what y	essage (HTML) rou want to do		E	5	-	×
Paste Cipboard	- 11 B I U */2 F2	 A* A* ⋮ = + ⋮ ∃ A + ≡ ≡ ≡ Basic Text 	Address Check Book Names	Attach Attach Signature File * Item * * include	Follow Up * High Importance Low Importance Tags Ts Ad	ffice d-ins d-ins			^
To Send Subject									

4. First, you need to address this new e-mail to your colleague. Click the To button:



5. The Select Names dialog box will now be displayed. Inside the Search text box, type the name of your partner:

Select Names: Offline Global Address List X								
Search: Name only OMore colu	Search: Name only OMore columns Address Book							
Jane Gibson	Go	Offline Global Address	List - jsmith@acmev 🕚	Advanced Find				
Name	Title	В	Susiness Phone	Location				
💄 Jane Gibson				A				

6. From the list of names, ensure that your partner's name is selected. Click the To button in the lower half of the dialog box:

earch: Name only N	dore columns Address	Book	
ane Gibson	Go Offline (Global Address List - jsmith@acm	Advanced Find
Name	Title	Business Phone	Location
Jane Gibson			
John Smith			
c			>
K To ->			>
To ->			>

If you do not see your partner's e-mail address, click the Cancel button and skip to Step 8.

7. The e-mail address of the selected contact will now appear within the To text box. Click OK:

Select Names: Offline Global Address List X									
Search: Nam 	e only 🔘 More colu	umns	Address Book						
Jane Gibson		Go	Offline Global Addre	ss List - jsmith@a	acme\ 🗸	Advanced Find			
Name		Title		Business Phone	e Loc	ation			
John Gibson						^			
<						>			
To ->	Jane Gibson								
Cc ->									
Bcc ->									
					ок 🖓	Cancel			

8. Returning to the message window, you will see the e-mail address and name of the contact that you selected in the To field:

₽						
File	Mess	age	Insert	Options	s Format Tex	t Review 🤉
Paste	6 Cut ≧ Copy € Forma	t Paint	er B	- 1 I <u>U</u> al		
Ten Send	To Cc Subject	.] . [lane Gibsor	1		

If your partner was not listed in the Select Names dialog box, type their e-mail address into the To field now.

9. Inside the Subject field, type "Project Information:"

₿	চ ্	Ŷ	∳ ₹			Untitled - Me	essage (HTML)			•	×
File	Message	Insert	Options	Format Text	Review	♀ Tell me what y	ou want to do				
Paste	6 Cut ≧ Copy ≸ Format Painte	B I	- 11 <u>⊔</u> ⊉	_ A* A* ∷ - A - ≡ ≡	· 1 · · · · · · · · · · · · · · · · · ·	Address Check Book Names	Attach Attach Signature File - Item	 Follow Up * High Importance Low Importance 	Office Add-ins		
CI	pboard	G.		Basic Text		Names	Include	Tags 🕞	Add-ins		^
ت Send	To Ja Cc Subject Pr	n <u>e Gibson</u> oject Inform	ation								

10. In the body of the message, type "Can you please send information about the upcoming project." Press the Enter key twice to add two lines and then type "Thanks:"

☐ 5 0 ↑ ↓ = File Message Insert Options Format Text Review	Project Information - Message (HTML) Q Tell me what you want to do	C. Matters	■ -	
$\begin{array}{c c} & & & & \\ & & & \\ & & & \\ &$	Address Check Book Names	Follow Up * High Importance Low Importance Tags Add-ins		<u>^</u>
Image: To Zene Solston Ce Ce Send Subject Project Information				
Can you please send information about the upcoming project. Thanks				

11. Click the Send button:

H	5	Q	Ŷ	. ↓		Р
File	Mes	sage	Insert	Options	Format Text	Review 🤉
Paste	Cut Copy	at Paint	Calibi er B J	ri (Bo(- 11 7 <u>U</u> ab <u>2</u>	• A • E	• = • &
Clip	pboard		Est.		Basic Text	Fail
send	To Cc Subject	. j	ane Gibson Project Infor I informat	mation ion about t	he upcoming pr	oject.
Thanks						

12. Review the message that you received from your partner and then close Microsoft Outlook 2016.

TOPIC B: Check Spelling and Grammar

One of the most important things to consider when composing and sending e-mails is spelling and grammar. Poor spelling and grammar can often cause confusion and reduce the impact of the message that you are sending. To help prevent common spelling and grammar mistakes, Outlook 2016 includes the AutoCorrect feature as well as a spelling and grammar checker. Over the course of this topic, you will learn about both tools and how to use them.

Topic Objectives

In this topic, you will learn:

- About the AutoCorrect feature
- How to use the spelling and grammar checker
- About the components of the Spelling and Grammar dialog box

THE AUTOCORRECT FEATURE

Enabled by default, the AutoCorrect feature checks for common spelling and grammar errors as you type. This means that if you make a mistake while typing, AutoCorrect will automatically

correct the error to what it thinks it will be. If AutoCorrect is unsure of what the correction should be, the error will be identified by a wavy colored underline (red if it is a spelling error or blue if it is a grammatical error).

In situations where an error is identified by a colored underline, you can right-click on the word and choose from one of the possible corrections that are listed in the context menu:

Can you pease se	end information abo	out the upcoming project.
63	Pease	
	please	
	peace	
	peas	
	peas'	
	lgnore All	
	Add to Dictionary	
	<u>W</u> ho ls	
đ	B Hyperlink	

Also in the context menu, you have the option to ignore the error or add it to the dictionary so that it is never flagged again.

THE SPELLING AND GRAMMAR CHECKER

While the AutoCorrect feature will find and fix many errors, performing a full spelling and grammar check will help you fix any other problems. To perform this check, click Review \rightarrow Spelling & Grammar, or press F7 on your keyboard:



This action will display the Spelling and Grammar dialog box. In this dialog box, the first incorrect word or sentence will be highlighted in red and the suggested corrections will be shown at the bottom of the dialog box:

Spelling and Grammar: English (United States)		? ×
Not in Dictionary <u>:</u>		
Can you peae send information about the	^	Ignore Once
upcoming project.		l <u>g</u> nore All
	•	<u>A</u> dd to Dictionary
Suggestio <u>n</u> s:		
peace	^	<u>C</u> hange
pear pear		Change A <u>l</u> l
peak pie	~	AutoCo <u>r</u> rect
Chec <u>k</u> grammar		
Options Undo		Cancel

When you have addressed all detected spelling and grammar errors (or if no errors were found), you will see the following dialog box:

Microsoft Outlook	×
Spell check is	complete.
OK	ļ

Click OK to complete the spell check and dismiss the dialog box.

Note that Outlook will not pick up on all spelling and grammar errors. You should always proofread your message to make sure it is correct.

COMPONENTS OF THE SPELLING AND GRAMMAR DIALOG BOX

The Spelling and Grammar dialog includes a variety of different components and controls that you can use to fix or ignore mistakes that are found.

When you are working with spelling errors, the following options will be available:

Ignore Once	Ignore this error.
Ignore All	Ignore this error every time it appears in this message.
Add to Dictionary	Add the current word to the dictionary so it is never identified as incorrect again.
Change	Change this word to the word selected in the Suggestions box or to what you have typed in the top part of the window.

Change All	Change all instances of this word to the word selected in the Suggestions box.
AutoCorrect	When typing, automatically correct this word to the word selected in the Suggestions box.

Once you have clicked one of those options, Outlook will continue checking your message for errors. You will have to go through this process for each word that is identified as misspelled.

Also note the following global settings in the Spelling and Grammar dialog:

Check Grammar Toggle grammar check on or off.	
Options	Change spelling and grammar options.
Cancel	Cancels the spell check.

If grammar problems are found, the Spelling and Grammar dialog box will look slightly different:

Spelling and Grammar: English (United States)	? ×
Agreement within Noun Phrases:	
Today's session will help you become a better	lgnore Once
marketers!	l <u>g</u> nore Rule
~	Ne <u>x</u> t Sentence
Suggestio <u>n</u> s:	
a better marketer 🔨 🔨	<u>C</u> hange
some better marketers	<u>E</u> xplain
better marketers v	
☑ Chec <u>k</u> grammar	
Options Undo	Cancel

In the top part of the dialog box, Outlook will show you the sentence it thinks is grammatically incorrect and will highlight the trouble part of the sentence. (You can type in this window to make changes to the sentence shown.) The bottom part of the dialog box gives you suggestions on how to change the word or sentence.

There are also buttons on the right-hand side of the dialog box to choose how you want to treat this error:

Ignore Once	Ignore this error.
Ignore Rule	Ignore the rule that applies to this error.
Next Sentence	Skip this error without making any changes.
Change	Change the current sentence to the selected suggestion.
Explain	Open a new window explaining this grammar concept.

And similar global options:

Check Grammar	Toggle grammar check on or off.
Options	Change spelling and grammar options.
Undo	Reverse the last change made.
Cancel	Cancels the spelling and grammar check.

ACTIVITY 2-2 Checking Spelling and Grammar

You are creating a message that is being sent to everyone in your organization to announce the retirement of one of your colleagues. You should make sure that the spelling is correct.

1. To begin, open Outlook 2016. Within your Exercise Files folder, double-click the Activity 2-2.msg file to open it. This message will be displayed in a separate Outlook window:

File Message	r ↓ = Insert Options	Format Text Revi	Joe's Retirement Pa iew Q Tell me what y	rty - Message (HTML) ou want to do	COL.		×
Paste	= 11 B I <u>U</u> a⊻	- A A = = = - A - = = =	Address Check Book Names	Attach Attach Signature	 ▶ Follow Up * I High Importance ↓ Low Importance 	fice I-ins	
Clipboard	G.	Basic Text	5 Names	Include	Tags 15 Add	1-ins	~
To							
Send Cc							
Subject	loe's Retirement Party						
Hey Folks,							
Joe's retierment pa	rty is planed for next	Friday at noon in Boar	droom C. Please bring a	my small gifts and well wi	shes. Food and refreshme	nts will be provided.	
Thanks,							
lohn							

2. Examine the body of this message. You will already see that there are two possible errors that have been underlined:

Hey Folks,
Joe's retierment party is planed for next Friday at noon in Boardroom C. Please bring any small gifts and well wishes. Food and refreshments will be provided.
Thanks,
John

3. Remember that a red underline indicates a spelling error, while a blue underline is used to identify a grammatical or contextual spelling error. Right-click the spelling error:



4. Click the "retirement" correction:

Hey Folks,

Joe's retierment party is planed for next Friday at noon in Boardroom C.

Thanks		retirement
manks,		Ignore All 나
John		Add to Dictionary
		<u>W</u> ho ls
	A	<u>H</u> yperlink

5. The selected correction will be applied and the error will be corrected:

Hey Folks, Joe's retirement party is planed for next Friday at noon in Boardroom C. Thanks, John

6. If you are working with a longer message, sometimes it can be quicker to use the spelling and grammar checker rather than manually correcting each error. Click Review → Spelling & Grammar to start the spell check:



7. With the Spelling and Grammar dialog box now displayed, you will see the remaining error in the current message:

Spelling and Grammar: English (United States)		? ×
Possible Word Choice Error <u>:</u>		
Joe's retirement party is planed for next Friday at	^	Ignore Once
noon in Boardroom C.		Ignore All
	~	Add to Dictionary
Suggestio <u>n</u> s:		
planned	^	<u>C</u> hange
		Change All
	~	AutoCorrect
Chec <u>k</u> grammar		
Options Undo		Cancel

8. In this case the error that was identified is a contextual spelling error with only one suggested correction. Ensure that this suggestion is selected and click the Change button:

Smalling and Commune English (United States)		2 ~
spening and Grammar: English (Onited States)		· ^
Possible Word Choice Error:		
Joe's retirement party is planed for next Friday at	^	Ignore Once
noon in Boardroom C.		ignore All
	~	Add to Dictionary
Suggestio <u>n</u> s:		
planned	^	<u>C</u> hange
		Change All
	~	AutoCorrect
Chec <u>k</u> grammar		
Options Undo		Cancel

9. The correction will have been made and the Spelling and Grammar dialog box will close. A smaller dialog box will be displayed that lets you know the spelling and grammar check is complete. Click OK:



10. Back in the message window, you will see that the message is now free of any spelling errors:

File	ර ් Message	∱ Insert	↓ ∓ Options	Format Text	Review	Joe's Retirement Party - Message (HTML) Q Tell me what you want to do			• –	
ABC Spelling Gramma	& Thesaurus ar Proofing	ABC 123 Word Count Ir	Smart ookup nsights La	te Language						^
۲ ۲ Send	Cc Subject	Joe's Retin	rement Party							
Hey Fo Joe's I Thank	olks, retirement¦p :s,	arty is pla	anned for next	Friday at noon	in Boardro	om C. Please bring any small gifts and v	well wishes. Food an	d refreshments will l	be provided.	
John										

11. Click File \rightarrow Save As:



12. Use the Save As dialog box to save the message to your desktop as Activity 2-2 Complete. Close Microsoft Outlook 2016.

TOPIC C: Format Message Content

Outlook 2016 offers many tools that you can use to format message content. This includes the ability to change the font face and color, apply text effects, and more. It's important to understand these tools if you are copying and pasting previously formatted text from other applications and you would like to make it uniform, or if you need to change message formatting to match organizational guidelines. Over the course of this topic, you will learn how to format message content using a variety of different tools.

Topic Objectives

In this topic, you will learn:

- About message formats
- About font options
- About paste options, including Paste Special
- About Live Preview
- About the mini toolbar

MESSAGE FORMATS

Messages can be sent in one of three types of formats: HTML, Rich Text, and Plain Text. You can switch between these different formats by clicking on one of the options inside the Format group of the Format Text tab:



The current mail format will be shaded in, as well as indicated directly in the title bar. By default, messages will use the HTML format. Although this format offers the most formatting features, there may be times when you want to use plain text or rich text format.

If you use the **Plain Text Format**, you will still have message options and the ability to attach files. You will also have some Word-specific options like spelling and grammar check. However, all formatting options (including font style, size, and color; bullets and numbering; themes; and graphics and tables) are disabled. The primary purpose behind this format is that you can guarantee that everyone you send this type of e-mail to, will be able to read it, no matter which email client that they use. **Rich Text Format (RTF)**, on the other hand, is a richer way to write text messages. All the formatting options are available, including stationery, themes, font styles, bullets and numbering, and graphics. What makes this format unique is that pictures are embedded in rich text messages rather than attached. While this format is useful, the primary difference between it and other formats is how it is encoded. This encoding is a proprietary Microsoft format, so people who don't use Outlook may not be able to read your e-mail.

HTML format operates using the same principles used to create many web pages. It's just as flexible as Rich Text format, so it has all the same formatting options. This format is also much more commonly used than Rich Text format, so most people should be able to receive and view your message in its proper format.

Changing the Format for All New Messages

If you prefer a specific message format, you can change the format for all new messages so that when you create a new message it is already in the format that you prefer.

To do this, first open the Outlook Options dialog by clicking File \rightarrow Options. Next, click the Mail category. Using the "Compose message in this format" drop-down menu, you can then choose the format that you would like to use for all new messages:



FONT OPTIONS

By default, any message that you create will use the Calibri font, with a font size of 11, and black as the font color. While this configuration is fine for many situations, you can change it using the various controls in the Basic Text group of the Message tab:

H	5	G						Unti	itled - Me	essage (H	TML)			
File	Mes	sage	Insert	Opti	ons	Format Text	Review	♀ Tell m	e what ye	ou want t	o do			
Paste	Cut	at Painte	Calik r	ori (Boc - I <u>U</u>	11 ª <u>v</u> -		· ∷ • ∻ ≡ •≡ •≡	Address Book	ی Check Names	Û Attach File ∓	Attach Item •	Signature •	 Follow Up * High Importance Low Importance 	e Office Add-ins

These commands can also be found in the Font group of the Format Text tab:

H •	5 (J	Ť	. ↓			Untitled - Message (HTML)
File	Message	Insert	Options	Format Text	Revi	iew 🛛 🖞 Tell me what you want to do
Paste	Aa HTML Aa Plain Tex <i>Aa</i> Rich Text	Calik t B	ori (E = 11 = I <u>U</u> abe X	$\begin{array}{c c} A^{\bullet} & A^{\bullet} & Aa \\ \hline \\ & & \\ & $	 	≝ - ≝ - '⊊ - = = = 2↓ ¶ ≡ = = = \$= - 2 - ⊡ -
Clipboard 🗔	Format		F	ont	- G	Paragraph 🕞

(The most popular commands are also included on the mini toolbar.)

To choose a font type, first select the text that you want to apply the font to. Next, click the **Font drop-down menu** on the Message tab, Format Text tab, or mini toolbar and select the font that you want to apply. As you scroll over each font, you will see a live preview of how it will look applied to your text:

🗄 🔊 ৫	↑ ↓ =			Jntitled - Messag	e (HTML)			D	-	×
File Message In	sert Options Format Text	Review	♀ Tell me what	you want to do						
Aa HTML Aa Plain Text Paste Clipboard 5 Format	Calibri • 11 • A* A* Aa • Theme Fonts Calibri Light Calibri	(Headings) (Body)	E - 'r - I € = = ‡= - Paragraph	≝ 2↓ ¶ ⊉• ≊ • ⊑	AaBbCcDc AaBbCcDc	AaBbC(Heading 1 Styles	AaBbCcC Heading 2	P Find ▼ abc Replace Select▼ Editing	Zoom Zoom	^
To Send Subject	All Fonts O Agency IB O ALGERIAN O Arial									
	Arial Black Arial Narrow Arial Narrow Arial Narrow Arial Nounded MT Bi Arial Unicode MS Baskerville Old Face Baukaru 93 Bellin Sans FB Berlin Sans FB Bedoni MT Bodoni MT Bodoni MT Black Bodoni	[⊋ old	•							

Note that theme fonts are listed at the top of the menu. Choosing these fonts will help keep your message consistent. Outlook also stores recently used fonts near the top of the menu.

You can change your font size the same way: select a size from the **Font Size drop-down menu** on the Message or Format Text tabs, or the mini toolbar. (You can also type a value in the Font Size box.) If you choose to use the menu, you will see a preview as you scroll through the sizes:



You can also use the up and down arrows on the Message or Format Text tabs or the mini toolbar to increase or decrease the font size in increments:



To change the font color, use your cursor to select the text that you want to change. Next, click the **Font Color drop-down menu** on the Format Text or Message tabs, or the mini toolbar. Move your cursor over the presented options and once again you will see a preview of how those colors will look. When you see a color you like, click it to apply it:

H	5 ()	Ŷ	. ↓			Ur
File	Message	Insert	Options	Format Text	Review	♀ Tell me what yo
Paste	6 Cut ≧ Copy ≰ Format Paint ¤board	er B	ri (Bo∢ ▼ 11 I <u>U</u> <mark>a</mark> 12		• ≟ - & = = = ic	Address Check Book Names Names
				Theme Colors	5	
ت= Send	To Cc Subject					
				Standard Cold	ors	
				More Col	ors	

Note that the theme colors take up the major portion of the color picker. This can help you keep your message looking consistent and professional. You can also choose a standard color or click More Colors to pick a custom color.

Applying Text Effects

The next part of working with text is applying formatting. The basic formatting types are:

Bold makes text darker.

Italics slant text to the right. Underline puts a line under text.

These effects can be found on the Message tab and the Format Text tab:



As well as the mini toolbar:



You can also use the following keyboard shortcuts:

- Bold: Ctrl + B
- Italics: Ctrl + I
- Underline: Ctrl + U

You can click the command to turn it on before you type text and then click it again to turn the formatting off, or select text and click the command to apply it.

You can also combine effects by turning multiple effects on:

Bold and underline

Bold italics

Italics and underline

Bold, italics, and underline

You will find three other effects in the Font group of the Format Text tab. From left to right, they are strikethrough, subscript, and superscript:

Cali	bri ((E 🔻	12	*	A ^	A	Aa 🗸	
В	I	U	abc	X ₂	X²	ab	• <u>A</u>	Ŧ
				For	nt			G.

Here is what they look like:

Strikethrough places a line through text.

Subscript makes text smaller and places it below surrounding text.

Superscript makes text smaller and places it above surrounding text.

Their application is the same as the basic effects: select text and choose your formatting, or turn the command on, type text, and turn the command off.

PASTE OPTIONS

Just like most Microsoft Office applications, Outlook supports several different paste options. These paste options allow you to choose what text formatting is transferred with copied text from another application. For example, if you copy a paragraph of text from a website you can choose to paste that content into a message using the formatting from the website, the formatting that the message is using, or no formatting at all.

Once you have pasted text, you will see a paste icon. If you press Ctrl or click the icon, you will see the following options:



You can also find these options by right-clicking in the message body and clicking on one of the commands in the Paste Options section of the context menu:



Or, you can click Message \rightarrow Paste drop-down arrow to view these paste options:



Keep Source Formatting (🕏)	Keep the formatting from the original text.
Match Destination Formatting (🛱)	Change the pasted text's format to the format used in the message.
Keep Text Only (🛱)	Changes the formatting of the pasted text back to the default font and size with no formatting.

No matter which method you use to choose a paste option, the commands will be the same:

The Paste drop-down arrow on the Message tab also contains a Set Default Paste command, which opens the Outlook Options dialog so that you can control how future paste operations work.

PASTE SPECIAL

The Paste drop-down arrow on the Message tab also gives you access to the Paste Special command, which allows you to choose how to paste copied content:



(Alternatively, you can also click Format Text \rightarrow Paste drop-down arrow \rightarrow Paste Special.)

This action will open the Paste Special dialog box:

Paste Special		?	\times
Source: Micro Untit	soft Word Document ed Message		
	<u>A</u> s:		
Paste: Paste link:	Microsoft Word Document Object Formatted Text (RTF) Unformatted Text Picture (Enhanced Metafile) HTML Format Unformatted Unicode Text	Display as icon	
Result			
	nserts the contents of the Clipboard as HTML Format		
		OK	Cancel
In this dialog box you can see where the content was copied from, as well as choose from a variety of different format options. (The formats listed here will depend on the type of content that has been copied. For example, if you copied an image the options will be different than if you copied text.) Once you have chosen a format, click the OK button to paste the copied item into your message using the chosen format.

LIVE PREVIEW

Live Preview is used to give you an idea of how a particular formatting change will look when applied. For example, if you are trying to choose a new font, hover your cursor over one of the options in the Font drop-down menu to see how that font will look when applied to the selected text:



You can also use this feature when trying to choose between the three paste options. Simply move your cursor over a paste option and you will see a preview of how it will look once applied:

- 5 (5 ↑ ↓ ∓	Untitled - Message (HTML)	⊠ – ⊡ X
File Message Insert Options F	prmat Text Review 🗘 Tell me what you want to do	
Scut Calibri (Bor 11 B Copy B I U Z A Paste Options: Basi Copy Copy B I U Z A Marke Options: Basi Subject Basi Hey Ashley, Could you please give me a status update Thanks, Jason	Address Check Attach Attach Signature Book Names Pollow Up* File Pollow Up* High Importance Include Yeat Names File Item * Tags 5 Add-ins Yeat Tags 5 Add-ins Add-ins Add-ins Names File Item * Tags 5 Add-ins Names File tem * Tags 5 Add-ins Names Names Names Tags 5 Add-ins Names Names Names Tags 5 Add-ins Names Names Names Tags 5 Add-ins	t where everyone is at.

THE MINI TOOLBAR

When working with text in Outlook, the mini toolbar is displayed by right-clicking or hovering your cursor over selected text:

Hey Ashley, Could you please give me a status undate on your current project? The Calibri (Body) $\stackrel{12}{}$ $\stackrel{\bullet}{}$ $\stackrel{\bullet}{}$

(In the latter case, the mini toolbar may be shown as transparent until you move your cursor over it.)

This toolbar contains the most popular formatting commands from the Basic Text group, plus one command from the Clipboard group.

Calibri (Body) 🔻 11 🔹	Change the font type and size.
A A	Use these buttons to nudge font size up or down.
* *	Click to toggle the Format Painter. This lets you copy formatting from the selected text and paint it onto other text.
в <i>I</i> <u>U</u>	Apply bold, italic, and/or underline effects.
aby -	Highlight text. Click the pull-down arrow for additional colors.
<u>A</u> ·	Change font color. Click the pull-down arrow for additional colors.
	Create a bulleted or numbered list.
A.d-	View the Styles gallery to apply a style to text.
Styles	

The mini toolbar will go back to being hidden when you move your cursor off the selected text or click elsewhere on your screen.

ACTIVITY 2-3

Formatting Message Content

You have checked a message for spelling errors. Now you would like to add some formatting changes.

1. To begin, open Outlook 2016. Within your Exercise Files folder, double-click the Activity 2-3.msg file to open it. This message will be displayed in a separate Outlook window:

File Messag	5 ↑ ↓ e Insert Options	∓ s Format Text	Joe's Retiremen Review Q Tell me w	nt Party - Message (HTML) hat you want to do		E	-	
Paste	Calibri (Boc v 1) ainter B I U at		tin v Address Ch Book Na	Attach Attach Signatur File * Item * *	► Follow Up * I High Importance Low Importance	Dffice dd-ins		
Clipboard To	6	Basic Text	r⊊ Names	Include	Tags 5 A	dd-ins		^
Send Subject	loe's Betirement Party							
Hey Folks,								
Joe's retirement	party is planned for ne	ext Friday at noon in	Boardroom C. Please b	ring any small gifts and wel	wishes. Food and refresh	ments will be provi	ded.	
Thanks, John								

2. Click inside the body of this message and press Ctrl + A on your keyboard to select the entire message:

H 5		Joe's Retirement Party - Messa	ge (HTML)	
File Messa	ge Insert Options Format	Text Review Q Tell me what you want to	do	
Paste Clipboard	Calibri (Bor • 11 • A A B I <u>U</u> 2 • A • G Basic Text	T III → III → I ↔ Address Check Book Names To Names	Linch Signature tem *	Office Add-ins Add-ins
To Send Subject	Joe's Retirement Party			
Hey Folks, Joe's retiremen	t party is planned for next Friday a	noon in Boardroom C. Please bring any smal	gifts and well wishes. Food and refre	eshments will be provided.
Thanks, John				

3. Click Message \rightarrow Font:



4. The Font drop-down menu will open. Move your cursor over some of the available options. You will see a preview of each selection. Click Arial when you are ready:

B	5 U		↑ ψ	÷			Joe's Re	tirement Par	ty - Mes	age (HTML)				•			×
File	Message	In	sert Opti	ons	Format Text	Review	Q Tel	I me what y	ou want t	o do							
Paste T	K Cut Copy Format Pair ipboard To Cc Subject	nter 5	Calibri ~ Theme Fon Cam br Calibri All Fonts O Agency IB O ALGE	11 ts ia RIA	A [↑] A [↑] IE	E + IE + A (Headings) (Body)	Addr Boo	ess Check ok Names Names	Û Attach File ≁	Attach Signatu Item * * Include	I Follow Up • I High Impor ↓ Low Import Tags	tance ance	Office Add-ins Add-ins				^
	subject	Joes	O Arial		1	<u></u>											
Hey F	olks,		O Arial E O Arial Nar	Black row		5											
Joe's provid	retirement ied.	party	O Arial O Arial Ur	Rour	ided MT B MS	Bold	bom	IC. Please	e bring	any small gift	s and well wishe	s. Fo	od and re	treshmen	ts will b	e	
Thank	cs,		O Basker	ville	Old Face												
John			O Bauha	U7 9	5												
			O Bell M	Г													
			O Berlin	Sans	FB												

5. Next, click Message \rightarrow Font Size \rightarrow 12:



6. Deselect the currently selected text by clicking on a blank area of the message. Use your cursor to select the word "John" at the bottom of the message. The mini toolbar will now be displayed:

Hey Folks,

Joe's retirement party is planned for next Friday at noon in Boardroom C.



7. On the mini toolbar, click the Bold command:

Hey Folks,

Joe's retirement party is planned for next Friday at noon in Boardroom C.



8. The selected text will now have the bold text effect applied to it. Still in the mini toolbar, click the Font Color drop-down menu and click "Dark Blue, Text 2:"

Hey Folks,

Joe's retirement party is planned for next Friday at noon in Boardroom C.



9. Your message will now look like this:

	\$ 0	т.	↓ =			loe's Retirement	arty - Message (HTML)			■ -	
Paste	Cut Copy Format Pain	Arial B I	 ✓ 12 <u>U</u> <u>av</u> 	A A E	+ 1 = + & = = = = = =	Address Chec Book Names	Attach Attach Signature File * Item * * Include	 ▶ Follow Up * ! High Importance ↓ Low Importance Tags Tag 	Office Add-ins Add-ins		
ت ت Send	To Cc Subject	Joe's Retirem	ent Party								
Hey Joe's will b	Folks, s retirement e provided	t party is p	lanned fo	or next Friday	/ at noon in	Boardroom	C. Please bring any s	mall gifts and well v	vishes. Foo	d and refresh	nents
Than	ıks,										
John											

10. Click File \rightarrow Save As:



11. Use the Save As dialog box to save the message to your desktop as Activity 2-3 Complete. Close Microsoft Outlook 2016.

TOPIC D: Attach Files and Items

One of the more common ways that people share files is through e-mail. While it can sometimes be possible to simply copy and paste the content from a file into the body of a message, that technique may not be practical when working with larger files. In such cases, attaching a file to an e-mail message may be the quickest way to send it to another person. Over the course of this topic, you will learn about file attachments and how you can send them to other people using Outlook 2016.

Topic Objectives

In this topic, you will learn:

- About attachments
- How to save and create attachments
- How to send Outlook items as attachments
- About the attachment reminder .

ATTACHMENTS

When working with e-mail, an attachment is any file that is sent along with an e-mail message. They can be just about anything from a document to a picture. Messages that contain an attachment are identified by the small paperclip icon that appears in a message's listing:

► (i)



When reading a message that includes an attachment, it will appear differently depending on how that message was formatted. For example, messages that are sent in the HTML format will show the attachment in header of the message:

Reply Image: Reply All Image	0 1 12:26 PM ✓
Schedule.docx 11 KB	
Action Items	+ Get more apps
Hey all,	
Joe is going to be retiring soon, so I thought we could throw a small celebration. Please let me know your ava week.	ailability for next
Thanks,	
John	

Messages that are sent using the RTF format will show attachments directly within the body of the message (usually at the bottom):

ထူ Reply ကြွ Reply All 🕰 Forward	
John Smith John Smith	12:43 PM
Joe's Retirement	~
Hey all,	
Joe is going to be retiring soon, so I thought we could throw a small celebration. Please let me know your availability for ne week.	≥xt
Thanks,	
John	
Schedule.docx	

SAVING ATTACHMENTS

To save the attachment in a message that you received, open the message and click the dropdown arrow in the listing for the attachment in question. From the list of options that are provided, click Save As:



Alternatively, if you received a message in the rich text format, you can save an attachment by right-clicking the icon for the attachment in question and clicking Save As:

Thanks	-	
John	Styl	e Crop
Schedu	1 * 10	Cu <u>t</u> Copy
	Ē	Paste Options:
		Ê.
		<u>O</u> pen
		<u>P</u> rint
		Save As
		Insert <u>C</u> aption
		Borders and Shading
	2	P <u>i</u> cture
	A	<u>H</u> yperlink

In either case, you will be prompted to choose a name and location for the file using the Save Attachment dialog box:

Save Attachment			×
← → • ↑ 🗖	→ This PC → Desktop → v Ö Search Desktop		p
Organize 🔻 New	w folder	■ ■ ■	?
 ✓ Quick access ✓ Desktop ✓ Downloads ☑ Documents ☑ Pictures ✓ Music ☑ Videos ☑ Microsoft Outloo ✓ OneDrive ☑ This PC 	MOS5015_Outlook_2016_1_Exercise Files		
File name:	Attachment		~
Save as type:	Microsoft Word Document		~
Aide Folders	Tools 🔻 Save	Cancel	

CREATING ATTACHMENTS

To attach a file to a message, click Message \rightarrow Attach File. This drop-down menu will list all the recent files that you have interacted with. If you see the item that you would like to attach listed here, click to add it. If not, you can choose to browse the files on your PC or web locations, such as your Microsoft OneDrive account:



If you choose Browse This PC, the subsequent dialog box will then allow you to find and select that file:



Alternatively, you can also drag and drop items from your desktop or File Explorer into the mail message to attach them:



No matter the method that you use, the attachment will be listed near the top of your message:



(If you are composing a rich text formatted message, the attachment icon can be placed anywhere within the message body using the drag and drop method.)

To remove an attachment from your message, right-click the attachment listing and click Remove Attachment:

H					
File	Message	Insert	Options	Format Text	Review
Paste Cli	6 Cut ≧ Copy ≸ Format Pain pboard	Calib ter B J	ri (Boc 🔻 11 I 😐 🔤	• A • E • A • E Basic Text	: • ¹ 3 <u>.</u> • ≬ : = • :: • : : :
ت ِ Send	To Cc Subject				
	Attached	111	cument.docx KB	·	
			<u>O</u> pen		
		-	Quick Print	t i i i i i i i i i i i i i i i i i i i	
			<u>S</u> ave As		
		\times	Remo <u>v</u> e At	tachment	
		Ē	<u>C</u> opy	63	

File Type and Size for Attachments

While attachments are essential in many working environments, it is important to keep in mind two important aspects about them: file type and file size.

The **type** of the file that you are sending as an attachment is important because you need to be sure that the person you are sending the attachment to, can open it. For example, while you can send an Adobe Photoshop file (.psd) to anyone, only those who have Adobe Photoshop installed their computer will be able to open it.

File size is also an equally important aspect to consider because larger files are more difficult to send as an attachment through e-mail. In fact, if an attachment is too large, the message may not be received by the sender at all.

OUTLOOK ITEMS AS ATTACHMENTS

Just like any other file, you can send Outlook items to other users as an e-mail attachment. This can make Outlook an extremely powerful organizational and collaboration tool. You can share contacts, views of your calendar, and even specific events with other users.

(Note that while you can send these items to anyone, you should ensure that the recipient uses Outlook as their e-mail client as these types of attachments are often not compatible with other e-mail clients.)

To add Outlook items as attachments, click Message \rightarrow Attach Item:



This drop-down menu lists three types of items that you can attach.

Business Card

A business card will typically include the contact information of a specific contact or contact group. To add a business card, click the Business Card command and click Other Business Cards.

This will open the Insert Business Card dialog box. Using its controls, you are able to find, view, and insert the business card that you want to add as an attachment to the current message:



Calendar

If you are collaborating with another person or group and need to choose a date and time for a meeting, sharing a link to your calendar can save a lot of time. This allows recipients of the link to view your calendar and see when you have free time as well as when you are busy.

When you click the Calendar option, the Send a Calendar via E-mail dialog box will be displayed. Using its controls you can specify the calendar that you would like to share, date range, detail level, and more:

Send a	Calendar via E	-mail	×
	Specify the ca	lendar information you want to include.	
	Calendar:	Calendar ~	
	Date Range:	Today ~	
		Wed 10/7/2015	
	Detail:	Availability only Time will be shown as "Free," "Busy," "Tentative," "Working Elsewhere," or "Out of Office"	~
		Show time within my working hours only <u>Set working ho</u>	urs
	Advanced:	Show >>	
		OK Cancel	

Outlook Item

Clicking this command will display the Insert Item dialog box. Using the controls in this dialog box, you are able to select any Outlook folder and then choose a specific item within that folder to attach:

Insert Item		×
Look in:		
ismith@acmewidgets.onmicrosoft.com	^	ОК
Drafts [1]		Cancel
Sent Items		Insert as
Deleted Items (7)		O Text only
Clutter		Attachment
▲ Cotter ▲ Contacts	~	
Items:		
! D Image: Subject Received Catego	ORIES	^
▲ Date: Today		
● John S Joe's Retirement Wed 10/7/2 Hey all, Joe is going to be retiring soon, so I thought we could through a	small	
🛛 John S Requested Documents Wed 10/7/2 🗌		
□ John S Joe's Retirement Wed 10/7/2 □ Hey all, Joe is going to be retiring soon, so I thought we could through a	small	~

You can then choose to insert the selected item(s) as text only or as an attachment. The recipient of these items will be able to view and work with these attachments.

ATTACHMENT REMINDER

If you have ever composed a new e-mail message that refers to an attachment, but forgot to include the attachment, you are not alone. To counteract this common occurrence Outlook includes an **attachment reminder**. This feature works by looking for sequences of words in your message that refer to an attachment.

If Outlook finds that the words "attachment," "attaching," or "attached" have been used, but no attachment has been added to the message, you will see the following reminder when you click Send:



You can enable or disable this feature by opening the Outlook Options dialog box (File \rightarrow Options) and then opening the Mail category. Within the "Send messages" section, check (or uncheck) the "Warn me when I send a message that may be missing an attachment" box:

Outlook Options		?	×
General	Send messanes		^
Mail			
Calendar	Tefault Importance level: X Normal V		
Groups	Mark messages as expired after this many days: 0		
People	Always use the default account when composing new messages		
Tasks	Commas can be used to separate multiple message recipients		
Search	Automatic name checking		
Language	Delete meeting requests and notifications from Inbox after responding		
Advanced	✓ LIKL + ENTER sends a message ✓ Use Auto-Complete List to suggest names when typing in the To, Cc, Empty Auto-Complete	e List	
Customize Ribbon	and Boo lines		
Quick Access Toolbar	₩ Warn me when I send a message that may be missing an attachment		
Add-ins	MailTips		
Trust Center	Manage MailTips options. For example, you may determine when and how to <u>MailTips Opti</u> display the MailTips bar and which MailTips to display.	ons	
	Tracking		
	Delivery and read receipts help provide confirmation that messages were successfully received. Not a e-mail servers and applications support sending receipts. For all messages sent, request: Delivery receipt confirming the message was delivered to the recipient's e-mail server	II	
	Read receipt confirming the recipient viewed the message		
	For any message received that includes a read receipt request:		
	O <u>A</u> lways send a read receipt		
	O Never send a read receipt		
	Ask each time whether to send a read receipt		
	Automatically process meeting requests and responses to meeting requests and polls		¥
	OK	Canc	el

ACTIVITY 2-4 Attaching a File to a Message

You have been asked to send a copy of an event flyer that you have been working on to your supervisor so that they can review it. To do this, you would like to send it as an attachment. Microsoft Word is required to complete this exercise.

1. To begin, open Outlook 2016. Within your Exercise Files folder, double-click the Activity 2-4.msg file to open it. This message will be displayed in a separate Outlook window:

$\begin{array}{c c c c c c c c c c c c c c c c c c c $		locart	↓ ∓	Format Text	Paulau	Event Flyer Draft	- Message (HTML)				
	K Cut Gopy Ste Clipboard	inter B I	 11 <u>⊔</u> <u>a</u>^b 		- 13 - & - 14 - &	Address Check Book Names Names	Attach Attach Signature File - Item Include	 Follow Up ▼ High Importance Low Importance Tags 5 	Office Add-ins Add-ins		
Subject Event Flyer Draft	nd To Cc Subject	Event Flyer D	raft								
lason	Jason, e is a copy of 1	he draft for t	the event fl	yer that I have l	been working	g on. Please let m	e know if you have any r	ecommendations or c	oncerns.		
re is a copy of the draft for the event flyer that I have been working on. Please let me know if you have any recommendations or concerns.											
re is a copy of the draft for the event flyer that I have been working on. Please let me know if you have any recommendations or concerns. anks,	anks,										
r econy re is a copy of the draft for the event flyer that I have been working on. Please let me know if you have any recommendations or concerns. anks, in	anks, 1n										
r new y re is a copy of the draft for the event flyer that I have been working on. Please let me know if you have any recommendations or concerns. anks, in	anks, In										
r act of the draft for the event flyer that I have been working on. Please let me know if you have any recommendations or concerns. anks, in	anks, In										
r action re is a copy of the draft for the event flyer that I have been working on. Please let me know if you have any recommendations or concerns. anks, in	anks, In										
r actions of the draft for the event flyer that I have been working on. Please let me know if you have any recommendations or concerns. anks, nn	anks, nn										
re is a copy of the draft for the event flyer that I have been working on. Please let me know if you have any recommendations or concerns. anks, hn	anks, hn										
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ere is a copy of the draft for the event flyer that I have been working on. Please let me know if you have any recommendations or concerns. anks, hn	ianks, hn										

2. Click Message \rightarrow Attach File \rightarrow Browse This PC:



3. The Insert File dialog box will now be displayed. Browse to the Exercise Files folder on your desktop. Find and select the Activity 2-4.docx file. Click Insert:

Insert File						
-> · 🛧 📙	<< Star	ting Files for Activities > Lesson 2		ٽ ~	Search Lesson 2	
rganize 🔻 New	folder				8==	•
📌 Quick access		Name	Date modified	Туре	Size	
📃 Desktop	*	🖂 Activity 2-2	10/7/2015 9:56 AM	Outlook Item	47 KB	
🕹 Downloads	*	🖂 Activity 2-3	10/7/2015 12:04 PM	Outlook Item	47 KB	
Documents	*	Activity 2-4	8/17/2015 2:07 AM	Microsoft Word D	195 KB	
E Pictures		Activity 2-4	8/17/2015 2:07 AM	Outlook Item	19 KB	
 Microsoft Outloo OneDrive This PC 	ok					
Network DESKTOP-7LF6	BS9					
崤 Homegroup						
	File nan	ne: Activity 2-4		~	All Files	

4. The selected file will appear below the Subject field in the message form:

🖶 5 ♂ ↑ ♦ ∓ Event Flyer Draft - Message (HTML)	Ð	-	×
File Message Insert Options Format Text Review Q Tell me what you want to do			
Paste Calibri (Box*11 **********************************			~
To			
Attached Activity 2-4.docx			
Hey Jason, Here is a copy of the draft for the event flyer that I have been working on. Please let me know if you have any recommendations or concerns.			
Thanks,			
John			

5. To ensure that the file is the correct one, right-click on the attachment and click Open:

File	Message	Insert	Optic	ons	Format Text	Review 🤉
Paste	& Cut ≧ Copy ≸ Format Pain ipboard	ter B	ori (Bo∢ ▼ <i>I</i> <u>U</u>	11 . ▼ ª <u>*</u> ▼ . Ba	A A E	• ¹ / ₃ → & = • = •
ت Send	To Cc Subject	Event Flye	r Draft			
	Attached	Ma 19	tivity 2-4 5 KB	.docx	-	
Hey Ja	son,		Open Quick	P <u>r</u> int		
Here is	s a copy of th	e draf 😾	<u>S</u> ave A	S	ive	been working (
Thanks	5,	×	Copy	e Attac	hment	
John						

6. The file will now be displayed in Microsoft Word:



7. Close Microsoft Word. Back at the message window, click File \rightarrow Save As:



8. Use the Save As dialog box to save the message to your desktop as Activity 2-4 Complete. Close Microsoft Outlook 2016.

TOPIC E: Enhance an E-mail Message

In addition to the basic formatting tools that you can use to customize the appearance of your messages, Outlook 2016 offers a whole suite of tools that you can use to further enhance them. Over the course of this topic you will learn about themes, styles, and special objects that you can use to enhance an Outlook 2016 e-mail message.

Topic Objectives

In this topic, you will learn:

- About the Illustrations group and the Text group on the Insert tab
- How to add SmartArt and WordArt to a message
- About the Screenshot tool
- About Quick Parts
- About contextual tabs
- How to use the Background Removal tool
- About galleries, styles, and themes

THE ILLUSTRATIONS GROUP

On the Insert tab of the Message window, you will see the Illustrations group:

₿	5 0	Ŷ	ψ	÷				Untitle	d - Mes	sage (HTML)		>	Ŧ	-		×
File	Message	Insert	Options	Form	iat Text	Review		Tell me v	/hat yo	u want to do							
0							\bigcirc		ılı,	0+	Hyperlink Bookmark	Text Box *	A Drop Cap - Dote & Time	π Equ Ω Syr	uation ` mbol •	-	
Attach File •	Outlook Busir Item Car	ess Calendaı I∓	r Signature *	Table	Pictures	Online Pictures	Shapes S	martArt	Chart	Screenshot *		✓ WordArt •	Object	A= Ho	rizontal	Line	
	Inc	ude		Tables			Illustr	ations			Links	Т	ext	S	ymbols		~

(Note that the commands in this group only become available when your cursor is placed within the body of the message.)

The commands in the group are used to insert different graphical objects into the currrent message, such as images, shapes, SmartArt, charts, and screenshots.

SMARTART

SmartArt allows you to easily add diagrams and other graphical elements directly into the body of an e-mail message. To insert SmartArt into a message, click Insert \rightarrow SmartArt:



This action will display the Choose a SmartArt Graphic dialog box. In this dialog box, click a category from the list on the left. Then, choose a diagram type from the center pane. (You will see a preview of the selected diagram type in the pane on the right.) When you're ready, click OK to insert the diagram:

Choose a SmartArt Gra	phic	?	×
Image: All Image: List Image: Process Image: Cycle Image: Hierarchy Image: Relationship Image: Relationship Image: Pyramid Image: Picture	List Image: Section of the sect	tial or grou ximizes bo	uped th for
	ОК	Car	icel

The selected SmartArt diagram will then appear directly within the body of your message. At this point, you can then click anywhere that says "Text" and add your own custom text:

□ ● ○ ↑ ↓ = File Message Insert Options	Format Text Review	SmartArt Tools Design Format	Untitled - Message (HTML) Ŷ Tell me what you want to do	
Construction ↑ Move Up Construction → Demote ↓ Move Do Construction ↓ Move Do ↓ Move Do Create Graphic ↓ Create Graphic	wn	uts	ange Dors + SmartArt Styles	Reset Graphic Reset
Image: send subject				
[Text] [[Text]	。 Text]] [Te>	[Text <t]< td=""><th>Type your text here × • [• • [Test] •</th><td></td></t]<>	Type your text here × • [• • [Test] •	
o	o		shapes. Learn more about SmartArt graphics	

Or, use the Text pane to enter text. With either method, Outlook will automatically adjust the text size so that it will fit in the shape.

When SmartArt has been inserted into your message and it is selected, you will see the SmartArt Tools contextual tab set appear on the ribbon. Using the tools in these two contextual tabs, you can further customize SmartArt in a variety of different ways, including changing the layout, style, and overall format.

THE SCREENSHOT TOOL

Another type of illustration that you can add to a message is a **screenshot** (an image capture of any open window on your desktop). To use the Screenshot tool, click Insert \rightarrow Screenshot and choose the window image that you want to insert:

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File	Me	ssage	Insert	Optior	ns Forn	nat Text	Review	v Ç) Tell me v	vhat yo	ou want to do			
Attach File *	Outlook Item	Business Card + Include	Calendar	Signatur	e Table Tables	Pictures	Online Pictures	Shapes Illu:	SmartArt strations	Chart	Available	Hyperlink Hookmark Windows	Cuick Parts •	Drop Cap
											a+ Screer	<u>Clipping</u>		

Alternatively, you can click Insert \rightarrow Screenshot \rightarrow Screen Clipping:

	5											Untitled - N	lessage (HTM	1L)		
File	Me	ssage	Insert	Optior	ns Forn	nat Text	Review	v Q) Tell me v	vhat yo	u want to do					
Û	U		a :					\bigtriangledown						A		A
Attach File ≠	Outlook Item	Business Card +	Calendar	Signatur	e Table	Pictures	Online Pictures	Shapes •	SmartArt	Chart	Screenshot •	Hyperlink	Bookmark	Text Box *	Quick Parts ≁	WordArt +
		Include	e		Tables			Illus	strations		Available	Windows				
												i The I manual	ч.			
											🗛 Screer	n <u>C</u> lipping	ß			

This option allows you to click and drag over the portion of the screen that you want to capture:

🗆 Start	× +		- 🗆 X
$\leftarrow \rightarrow o$			
		Where to next?	8
		+	

(Note that if you would like to take a screen clipping of a specific window, that window needs to be displayed in the background, not minimized.)

In either case, once the screenshot has been captured it will automatically be inserted into the body of your message:

E 5 C 1	↓ ∓ Options FormatText Review	Picture Tools Untitled - Mes	sage (HTML)		■ - □ ×
Remove Background Color * Artistic Effects Adjust	Compress Pictures	Picture Styles	Picture Border * Q Picture Effects * Q Picture Layout * Text	Bring Forward Bend Backward Bend Backward Bend Backward Bend Backward Bend Backward Arrange	Image: Crop with the system 0.52" 1 Size 1 0.52" 1
To To Send Subject					
ο βearch or enter wet	o address O				

THE TEXT GROUP

Also on the Insert tab of the Message window, the Text group provides you with access to commands that are used to insert text in various ways:

B	5	Q	Ŷ	↓ =	;			Picture Tools		I	Jntitled - M	essage (HTM	IL)					- Yili	>
	Me	ssage	Insert	Options	Form	nat Text	Review	Format	Q Tel	ll me what	you want to								
U	0_							🖓 🚡	di i	0+			A		A	Drop Cap -	π	Ω	A
Attach	Outlook	Business	Calendar	Signature	Table	Pictures	Online	Shapes SmartArt	Chart S	creenshot	Hyperlink	Bookmark	Text	Quick	WordAr	t	Equation	Symbol	Horizontal
File ∽	ltem	Card *		÷	*		Pictures	Ŧ		Ŧ			Box *	Parts -	Ŧ	Object	*		Line
		Include			Tables			Illustrations			Lin	nks			Text			Symbols	

QUICK PARTS

Quick Parts allow you to create and save specific pieces of content that are frequently reused. This can include titles, author names, and other similar content. Once a Quick Part has been created, it can then be quickly added to a message to help save you time.

Creating Quick Parts

To create a new Quick Part, first select the content that you would like to work with. Next, click Insert \rightarrow Quick Parts \rightarrow Save Selection to Quick Part Gallery:

₿	ن	ত	Ŷ	ψ =	-						Untitled - M	lessage (HTN	ИL)				
File	Messa	ige	Insert	Options	Form	nat Text	Review	r ♀ Tell me	what yo	ou want to do							
Attach	Outlook Bu	usiness	Calendar	Signature	Table	Pictures	Online	Shapes SmartArt	Chart	Screenshot	Hyperlink	Bookmark	A Text	Quick		Drop Cap - Date & Time	π Equation 5
File -	ltem C	Card 🔻		- -	-		Pictures	-		*			Box -	Parts	• •	Object	· ·
		Include			Tables			Illustrations			Li	nks		<u>(i</u>)	AutoText		÷.
Send John CEO (ABC) (555)	To Cc Subject Smith & Founder Widgets Co 555-1234	r o.													Save Selec	tion to Quick Part	Gallery 📐

The Create New Building Block dialog box will open. Here, you can give this new building block a name and description. Additionally, you can categorize it into a gallery and category. To create the new Quick Part, click OK:

Create New	Building Block ? ×
<u>N</u> ame:	John Smith
<u>G</u> allery:	Quick Parts 🗸
<u>C</u> ategory:	General
<u>D</u> escription:	
<u>S</u> ave in:	NormalEmail
Options:	Insert content only
	OK Cancel

Using Quick Parts

Once a Quick Part has been created, you can add it to the message that you are composing by clicking Insert \rightarrow Quick Parts \rightarrow [Quick Part]:

H	5	Q	Ŷ	ψ :	-						Untitled - N	dessage (HTN	ИL)					- Yill	>	
File	Me	ssage	Insert	Options	Forn	nat Text	Review	r ♀ Tell m	e what y	ou want to do									Althur a	
Ú Attach File *	Outlook Item	Business Card •	Calendar	Signature *	Table	Pictures	Online Pictures	Shapes SmartA	rt Charl	Screenshot	Hyperlink	Bookmark	Text Box *	Quick Parts	A WordAr	A Drop Cap ~ Top Cap ~ Date & Time	π Equation	Ω Symbol	A= A= Horizontal Line	
		Include	2		Tables			Illustrations			Li	nks		Gen	eral					
														John	imith					
														John Si CEO & ABC W (SSS) S	hith ounder dgets Co. 15-1234	Ę	2			
														٤ų ۽	utoText					Þ
														B	ave Sele	ction to Quick Part	Gallery			

The selected Quick Part will then be inserted into your message where your cursor was last placed:



About AutoText

AutoText works under a similar premise but allows you to create and reuse frequently added phrases. These phrases are added to the AutoText gallery which you can then use to insert saved phrases into an e-mail.

WORDART

WordArt is used to stylize message text using various special effects, such as colored outlines, colored fills, and a variety of different effects.

To add WordArt to a message, first select the text that you would like the WordArt to be applied to. Next, click Insert \rightarrow WordArt \rightarrow [Style]:

	5	ত	Ŷ	ψ =	;						Untitled - Message (HT	ML)						W.
File	Me	essage	Insert	Options	Form	nat Text	Reviev	v 🛛 🖓 Tell me	what yo	ou want to do					a di Bili anti			. Maannii
() Attach	Outlook	Busines	Calendar	Signature	Table	Pictures	Online	Shapes SmartArt	Chart	Screenshot	Hyperlink Bookmark	Text	Quick	A WordArt	Drop C	ap + Time	π Equation S	$\Omega \xrightarrow{A=}_{A=}$
File *	Item To	Card + Incluc	le	*	Tables		Pictures	• Illustrations		Ť	Links	Rox *	Parts *	A	A	A		A
Send	Cu	c												Α	Α	A	A	А
Exam	nple Tex	đ												A	A	A	A	A

The selected text will then be converted to WordArt using the style that you selected. The WordArt will automatically be selected and the Drawing Tools – Format contextual tab will be displayed on the ribbon:

File	ち (Messag	o ↑ Insert	↓ Options	∓ Format Text	Review	Drawing Tools Format	🖗 Tell me w	Untitled - Mer	ssage (HTMI i do	.)	2	C		Na Robert Marcel	■ -		×
	\□00 L¢Φ0 \{}\$) - 🔀 Edit o + 🎦 Drar r +	Shape * v Text Box	Abc Abc	Abc	 A Shape Fill A Shape Ou A Shape Effective 	tline *	AA	A	A Text Fill *	🔹 Align Text -	Wrap Text *	Bring Forward * Send Backward *	F Align * E Group * A Rotate *	(1) 0.71" (2.99"	0	
1 - 1 Send	To Cc Subject			0	Shape Styles		G	Wo	rdArt Styles	6	a Text		Arrange		Size	G.	
	Exai	npl	e To	ext													

Using the commands on the Drawing Tools – Format tab, you can customize exactly how the selected WordArt appears. This includes changing the overall style, fill color, outline color, shape effects, and more.

CONTEXTUAL TABS

By default, Microsoft Office Outlook 2016 includes a set number of tabs depending on the Outlook workspace that is displayed. The main Outlook 2016 window includes four tabs (not including the File tab):



Inside the message window you will find five different tabs:



Sometimes a contextual tab will be added next to the standard commands if you are working with a specific object. For example, if you are searching, you will see the Search Tools – Search tab:



Or, if you add an image to a message, the Picture Tools – Format contextual tab will be displayed:

8	চ ত 🔿				Untitled - Message (HTML)				
	Message Insert	Options Format Te	ext Review	Format					
Remove Background	* Corrections *	교 Compress Pictures 같고 Change Picture 입 Reset Picture ~			Carl Carl Carl Carl Carl Carl Carl Carl	Harring Forward → Raign → Harring Forward → Raign → Harring Forward → Raign → Wrap Text → Restection Pane → Rotate →	Crop Width: 8.76"	•	
	Adjust				Picture Styles	Arrange	Size	G.	~

Here are some additional contextual tab sets that you may see.

Drawing Tools

E	3	\$	Q	Ŷ	ψ	÷			Drawing Tools		Unti	tled - Mess	age (HTM	L)					=			×
F		Mes	age		Option		mat Text	Review	Format	Q Tel												
		,□C L¢∛ ({}		🔀 Edit :	ihape * Text Box	Abc	Abc	Abc	 ▲ △ Shape Fil ■ ✓ Shape Or ▼ ④ Shape Efil 	l * utline * fects *	А	А	A	4 + +	A Text Fill ~ 8 Text Outline ~ 3 Text Effects ~	😩 Align Text -	Wrap Text *	Bring Forward Send Backward	 Image: Align * Image: Group * Image: Align * Image: Align * 	1.19"	¢	
		In	sert Shi	spes				Shape Style	15	G		We	ordArt Style	s		Text		Arrange		Size	e	5 A

SmartArt Tools

🔒 🔊 🖑	↑ ↓ =	SmartArt Tools	Untitled - Message (HTML)			■ - □ ×
File Message	Insert Options Format Text Review	Design Format				
Edit in 2-D	Abc Abc Abc Abc A	bc Abc Abc	 Shape Fill * ✓ Shape Outline * ✓ G Shape Effects * 	A A Text Fill *	Bring Forward → Bend Backward → Wrap Text → Selection Pane → A →	\$11.13" 1.88" 1.88"
Shapes	Shape	Styles	G.	WordArt Styles 12	Arrange	Size 🗔 🔺

Table Tools

								tled - Message (HTML)					
File Messa	ge Insert	Options	Format Text	Review	Design	Layout	♀ Tell m						
Select ▼ Wiew Gridlines Properties	Draw Eraser Table	Delete	Insert Insert In Above Below	nsert Insert Left Right	Merge Cells	Split Split Cells Table	AutoFit	€]] Height: 0.01* ₩idth: 3.25*	Distribute Rows Distribute Columns	Text	Cell On Margins	A ↓ the Repeat Header Rows Z ↓ the Convert to Text Sort fx Formula	

Chart Tools

	ب	5 t	ψ	÷		Char	t Tools	Untitled - Message (I	HTML)					æ
File	Messag	e Insert	Options	Format Text	Review	Design	Format	🔓 Tell me what you wan	nt to do					
Add Chart	Quick	Change Colors				hill	di b	երի բերի	<u>6 4 1</u> 0 1	in i	Switch Row/	Select Edi	Refresh	Change Chart Type
Chart La	ayouts	001015				CI	nart Styles				Condition	Data	0.010	Туре

THE BACKGROUND REMOVAL TOOL

The Background Removal tool is used to remove the background from an image that has been inserted into a message. To use this tool, first click to select the image in question. Then, click Picture Tools – Format \rightarrow Remove Background:

B	5	Q	Ŷ	ψ	÷				Picture Tools		Ur	ntitled - Me	ssage (HTML)
File	Mes	age	Insert	Optio	ns	Format Te	xt I	Review	Format	♀ Tell	me what y	you want to	o do
Remove Background	*	Correct Color • Artistic	tions * Effects *	📜 Com 🚰 Char 🐿 Rese	npress nge Pi et Pictu	Pictures cture ire *							Picture Border *
3			Adjust							F	icture Styl	es	G.

Once selected, you can reposition and/or resize the rectangle over the image so that it encapsulates the primary subject of the picture. In this case, the flower is the main subject:



The purple areas on the image indicate what will be removed from the image. You can mark more areas to keep (or remove) by using the commands on the Background Removal tab, which appears when this tool is enabled. Once you are finished making your changes, click Background Removal \rightarrow Keep Changes:



The background that was marked will then have been removed:



GALLERIES

In Outlook (and many other Office applications), the term **gallery** refers to a detailed menu that lists all the available options for a specific command. For example, clicking Insert \rightarrow Shapes will display a large gallery of shapes that can be inserted into a message:

⊟ 5 0 ↑ ↓ =	Untitled - Messi	age (HTML)		⊞ – ⊡ ×
File Message Insert Options Format Text Review				
Attach Outlook Business Calendar Signature File* Item Card* Indude Tables Indude	Shapes SmartArt Chart Screenshot Hyperlink B Recently Used Shapes Link	S Text Quick WordArt Drop Cap *	πΩ Ω A= Equation Symbol Horizontal Line Symbols	~
To Send Subject	□ \ \ □ ○ □ △ ጊ ↓ ♀ ↓ 6			
I				
	©GCODFL/4080 □0⊚≏□©V*(⇔\ ()()()			
	Block Arrows 다 수 수 수 상 승 송 송 후 후 관 골 골 통 경 내 자 다 다 다 고 가 다 다 감 유 슈 슈			
	Equation Shapes			
	+ - x + = #			
	Flowchart			
	Stars and Banners			
	\$0+\$00000000 8728700000000			
	Callouts DDD Calore Cal			
	New Drawing Canvas			

STYLES

Styles are a saved set of formatting options that help you keep your message consistent. For example, instead of having to remember what formatting was used for a quote, you can simply use the pre-built styles each time you want to format a quote.

You can find many styles within the Styles group of the Format Text tab in the Message window:

ল ২০ ৫	↑ ↓ =	Untitled - Message (HTML)		🖬 – 🗆 X
File Message In	sert Options Format Text	Review Q Tell me what you want to do		
Paste Sorrant Painter	Aa HTML Aa Plain Text Aa Rich Text B I U abc x ₂	A* A* A* Image: How the state of	AaBbCc AaBbCc AaB Heading 1 Heading 2 Title Change Styles ~	P Find ▼ ab Replace Select ▼ Zoom

The option button in this group opens the Styles task pane, where you can view and manage all styles:

🗄 🔊 🖉 🔶 🗸	Ŧ	Untitled - Message (HTM	u)		■ - □ ×
File Message Insert Optic	ons Format Text Review Q Tell				
Paste Stormat Painter	Calibri (E \cdot 11 \cdot A \cdot A \cdot A \cdot \cdot B I \underline{U} abc x, x' $\overset{*}{\rightarrow}$ $\overset{*}{\rightarrow}$ $\underline{A} \cdot$		ABBCCDC ABBCCDC ABBCC(Normal TNo Spac Heading 1	AaBbCcC AaB	A p Find * Q ange b Select * Zoom
To					Styles VX Clear All Normal V No Spacing V Heading 1 22 Subtle Emphasis a Emphasis a Interus Emphasis a Stotte Emphasis a Interus Emphasis a Stotte Baylandi Subtle Reference a Lint Pursgraph V Subtle Reference a Lint Pursgraph V Subtle Networks Subtle Networks Networks Subtle Networks Subtle N

Applying a Style

Outlook places the most frequently used styles in the Styles gallery on the Format Text tab for quick access:



If you click the More button () in the lower right-hand corner of the gallery, you will see additional styles:

AaBbCcDc	AaBbCcDc	AaBbCo	AaBbCcE	АаВ	
¶ Normal	୩ No Spac	Heading 1	Heading 2	Title	
AaBbCcD	AaBbCcDu	AaBbCcDu	AaBbCcDu	AaBbCcDc	
Subtitle	Subtle Em	Emphasis	Intense E	Strong	
AaBbCcDu	AaBbCcDu	AABBCCDE	AABBCCDE	AaBbCcDu	
Quote	Intense Q	Subtle Ref	Intense R	Book Title	
AaBbCcDc					
¶ List Para					
🏂 Create a	a <u>S</u> tyle				
<u>C</u> lear Fo	ormatting				
4월, Apply S	tyles				

To apply any of these styles, first select the text that you want to format and click a style.

You can also apply styles using the Styles task pane by selecting the text that you would like to apply the style to and then clicking the desired style from the task pane:

🗄 🔊 🖉 🔶 🗸	∓ Untitled - Message (HTML)	⊞ – ⊡ ×.
File Message Insert Optio	ons Format Text Review 🗘 Tell me what you want to do	
Cut Aa HTML Paste ✓ Format Painter Clipboard ™ Format	Cation Li 28 · A [*] A [*] Aa · Aa Image: State for the s	P Find → Q Replace Select → Zoom Editing Zoom A
Send Subject		Vies VX Star All Vormal V Vormal V Subtraction Vormal V Vormal V V V Vormal V V V V V V V V V V V V V V

Creating Styles

You can also create new styles from scratch. To do this, click the New Style button in the bottom left-hand corner of the Styles task pane:

Clear All	_
Normal	T
No Spacing	T
Heading 1	<u>¶a</u>
Heading 2	<u>¶a</u>
Title	<u> па</u>
Subtitle	<u>¶a</u>
Subtle Emphasis	а
Emphasis	а
Intense Emphasis	а
Strong	a
Quote	<u>¶a</u>
Intense Quote	<u>πa</u>
Subtle Reference	a
Intense Reference	а
Book Title	а
List Paragraph	T
Show Preview Disable Linked Sty	les
× 3 3	Options.

This action will display the Create New Style from Formatting dialog box. The settings in this dialog box are based on any existing or selected text in the Message window:

Create New Style from Formattin	ng	?	×
Properties			
<u>N</u> ame:	Style1		
Style <u>t</u> ype:	Paragraph		\sim
Style <u>b</u> ased on:	11a Title		\sim
Style for following paragraph:	¶ Style1		\sim
Formatting			
Calibri Light (Heac 🗸 28 🗸	B I <u>U</u> Automatic ~		
= = = =			
Previous Paragraph Previous Paragraph Paragraph Previous Paragraph Previo Example Text	nph Previous Paragraph Previous Paragraph Previous Paragraph Previou: ous Paragraph Previous Paragraph Previous Paragraph	9	
Following Paragraph Following Para Following Paragraph Following Para	agraph Following Paragraph Following Paragraph Following Paragraph graph Following Paragraph Following Paragraph Following Paragraph		
Style: Show in the Styles gallery Based on: Title	/		
Only in this <u>d</u> ocument ON	ew documents based on this template		
F <u>o</u> rmat ▼	ОК	Cano	cel

Using the controls in this dialog box, you can name the style and customize all aspects of it. You can base it on an existing style, choose its font, change the font size, apply text effects, and much more. As you work, a preview will be displayed within the middle of the dialog to show you how the current settings will look when applied to actual text:

roperties Name:	Bold Header					
Style type:	Paragraph					
style <u>type</u> .						
Style <u>D</u> ased on:						
Style for following paragrap	ph: ¶ Bold Header	~				
ormatting						
Calibri (Body) 🗸 12 🗸	V B I U Automatic V					
	= = ↓= ↑= ! * = * =					
Paragraph Previous Paragraph P Example Text Following Paragraph Followin,	Previous Paragraph Previous Paragraph Previous Paragraph g Paragraph Following Paragraph Following Paragraph Following Paragraph					
Following Paragraph Followin, Following Paragraph Followin, Following Paragraph Followin, Following Paragraph Followin, Following Paragraph Followin, Following Paragraph Following	g Paragraph Following Paragraph Following Paragraph Following Paragraph g Paragraph Following Paragraph					
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Following Paragraph Followin Following Paragraph Followin Following Paragraph Followin Following Paragraph Followin Following Paragraph Followin Following Paragraph Followin Following Paragraph Followin Font: 12 pt, Bold, Style: Shoc Based on: Normal	g Paragaph Following Paragaph Following Paragaph Following Paragaph g Paragaph Following Para					
Following Paragraph Followin Following Paragraph Followin Following Paragraph Followin Following Paragraph Followin Following Paragraph Followin Following Paragraph Followin Following Paragraph Followin Font: 12 pt, Bold, Style: Sho Based on: Normal	g Paragaph Following Paragaph Following Paragaph Following Paragaph g Paragaph Following Paragaph					
Following Paragraph Followin Following Paragraph Followin Following Paragraph Followin Following Paragraph Followin Following Paragraph Followin Following Paragraph Followin Following Paragraph Followin Font: 12 pt, Bold, Style: Sho Based on: Normal	g Paragaph Following Paragaph Following Paragaph Following Paragaph g Paragaph Following Paragaph Followin					
Following Paragraph Followin Following Paragraph Followin Following Paragraph Followin Following Paragraph Followin Following Paragraph Followin Following Paragraph Followin Following Paragraph Followin Font: 12 pt, Bold, Style: Sho Based on: Normal	g Paragaph Following Paragaph Following Paragaph Following Paragaph g Paragaph Following Paragaph Followin					

Once you have finished constructing a new style, you can then choose to add this new style to the Styles gallery, as well make it available in only this document (message) or any messages that are based on this template.

Click OK to create the new style. With the style created, you can then work with it and apply it as you would any other style.

THEMES

Themes are a preset combination of colors, fonts, and effects. They allow you to apply a consistent look amongst all the content that you create or add to an e-mail message. Several themes are available by default, and are found by clicking Options \rightarrow Themes:

₿	5				
File	Messag	ge Inse	ert O	ptions	Forma
Aa Themes	A Fonts •	Page Color •	Bcc	From	Permissi •
Aa	Aa e Fa		a	Aa	
Aa . Ion Boa	I Aa	anic Re	la	Aa	e
Aa . Wisp			Retro:	spect	
Re	set to Them	e from Ten	nplate		
Erc	owse for The	emes			
Sav	/e Current T	heme			.:

As you mouse over each theme, you will see a preview applied to your message (if it has theme elements such as page backgrounds, styles, or diagrams). To apply a new theme, click the desired thumbnail.

Creating Custom Themes

You can define new themes by creating a different combination of colors, fonts, effects, and page colors. You can find these commands within the Themes group of the Options tab:

H	5 d	∍ 1	, j	, ÷			Untit	led - Messi	ige (HTML)	
File	Message	e Ins	ert (Options	Format Te	xt Review	♀ Tell me what you w	/ant to do		
Aa Themes	Colors *	Page Color *	å å Bcc	å å From	Permission	Use Voting Buttons *	Request a Delivery Receip Request a Read Receipt	ot Save S Item T	ent Delay	Direct Replies To
	Themes		Show	Fields	Permission		Tracking	Es l	More Optio	ns 🕞

Saving Custom Themes

Once you have found a combination of theme settings that you would like to apply, click Options \rightarrow Themes \rightarrow Save Current Theme:



This action will display the Save Current Theme dialog box. Here, you can choose a location where you want the theme to be saved (which will be the Document Themes folder by default), as well as give it a name:

Save Current Them	e					×				
AppData > Roaming > Microsoft > Templates > Document Themes > Search Document Themes Search Document Search Docum										
Organize 🔻 New	/ folder				<u>}</u> == ▼	?				
Documents >	Name	Date modified	Туре	Size						
Pictures 🤉	Theme Colors	9/2/2015 7:56 PM	File folder							
03 Microsoft Outlo	ol 🔜 Theme Effects	9/2/2015 7:56 PM	File folder							
- On Drive	- Theme Fonts	9/2/2015 7:56 PM	File folder							
ConeDrive										
This PC										
E Desktop										
🔮 Documents										
👆 Downloads										
Music										
Pictures										
Videos										
🏪 Local Disk (C:)	~									
File name	Example					~				
Save as turner	Office Theme									
save as type:						~				
Hide Folders				Tools 🔻	Save Cance	el				

Once a theme has been created and saved, you will be able to find and apply it by clicking Options \rightarrow Themes, and then examining the Custom section of the Themes gallery:

H	5	G	Ŷ	ψ	Ŧ	
File	Me	essage	Insert	Optio	ons	Forma
Aa Theme	Col A For Effe	lors * nts * P ects * Co	age B	cc Fro	om P	ermissi
Custo	m					
Aa	nple					
Offic	e					
Aa	ice	Aa Facet	Aa _	ıral	Aa Ion	
Aa Ion Bo	ard	Aa Organic	Aa . Retros	pect	Aa Slice	
Aa	sp					
R	eset to T	heme fro	m Templa	te		
E B	rowse fo	r Themes				
S S	ave Curre	ent Them	e			.:

ACTIVITY 2-5

Enhancing an E-mail Message

You are sending an invitation out to many people in your organization to attend a retirement party. You would like to enhance this e-mail message to give it some flair.

1. To begin, open Outlook 2016. Within your Exercise Files folder, double-click the Activity 2-5.msg file to open it. This message will be displayed in a separate Outlook window:

Image: Source Contract Test Doe's Retirement Party - Message (HTML) Image: Message Locate Contract Test Image: Message Locate Contract Test	⊞ - □ ×
* Cut Cut Cut Cut Cut Cut File File File Format Format Format Cut Cut	^
To [Soubject Joe s Retirement Party	
Hey Folks, Joe's retirement party is planned for next Friday at noon in Boardroom C. Please bring any small gifts and well wishes. Food and refreshments will be provided.	
Thanks,	
John	

2. Use your cursor to select the first sentence after the greeting line:

🔒 🕤 🗇 🕴 🕫 Joe's Retirement Party - Message (HTML)	œ ()−0	□ ×
File Message Insert Options Format Text Review 🖓 Tell me what you want to do		
Bic Copy Parte Calabri (Box • 11 • A* A*) E • E • I * I A Image: A * I = • E • I A Image: A * I = • E • I A A Image: A * I = • E • I Image: A * I = • E • I Image: A * I = • E • I Image: A * I = • E • I Image: A * I = • E • I Image: A * I = • E • I Image: A * I = • E • I Image: A * I = • E • I Image: A * I = • E • I Image: A * I = • E • I Image: A * I = • E • I Image: A * I = • E • I Image: A * I = • E • I Image: A * I = • E • I = • I = • I = 0 Image: A * I = • E • I = • I = • I = 0 Image: A * I = • E • I = • I = • I = 0 Image: A * I = • E • I = • I = • I = 0 Image: A * I = • E • I = • I = • I = 0 Image: A * I = • E • I = • I = • I = 0 Image: A * I = • I = • I = • I = 0 Image: A * I = • I = • I = • I = • I = 0 Image: A * I = • I = • I = • I = 0 Image: A * I = • I = • I = • I = 0 Image: A * I = • I = • I = • I = 0 Image: A * I = • I = • I = 0 Image: A * I = • I = • I = • I = 0 Image: A * I = • I = • I = • I = 0 Image: A * I = • I = • I = • I = 0 Image: A *		^
To To Send Cc Subject Joe's Retirement Party		
Hey Folks,		
oge's retirement party is planned for next Friday at noon in Boardroom C. पि Please bring any small gifts and well wishes. Food and refreshments will be provided.		
Thanks,		
John		

3. With the first sentence still selected, click Insert \rightarrow WordArt. Choose the style highlighted below:

🔒 S 🖉 👌 🔹 🗧 Joe's Retirement Party - Message (HTML)	⊞ – ⊡ ×							
File Message Insert Options Format Text Review 🖓 Tell me what you want to do								
Attach Outlook Business Galandar Signature File tem card	Duck WordArt Dop Cap * T Object A Cap * Equation Symbol Horizontal							
Include Tables Illustrations Links								
To	— A A A A —							
Send Subject Descriptioner Bate								
Hey Folks,	A A A A							
Joe's retirement party is planned for next Friday at noon in Boardroom C.								
Please bring any small gifts and well wishes. Food and refreshments will be provided.								
Thanks,								
John								

4. The selected sentence will now have been converted into the WordArt style that you selected:

₽ 5	ن م	↓ ÷		Drawing Tools	Joe's Retirement	Party - Message (HT	'ML)		æ	- (×
File Me CALLの なってく にset S	sage Insert	Abc A	bc Abc	Shape Fill ~ C Shape Outline ~ G Shape Effects ~ Shape Effects ~	A A WordArt	Type want to do	(호) Align Text ~ @ Create Link Text	Bring Forward Wrap Text - Send Backward Selection Pane Arrange	- ╠ Align - - II: Group - 2 Rotate -	\$]] 1.36" ++++++++++++++++++++++++++++++++++++	
Send Subje		rement Party									
Hey Folks,											*
Joe	e's re	etirei	ment	party i	s plai	nned (for ne	ext Frida	iy at	noc	n
.Ÿ.							Go				
Please bring	any small gifts	and well wishe	s. Food and refre	shments will be provide	d.						
Thanks,											
John											
•											•

5. Now, use your cursor to select the next line in this message:



6. Click Format Text \rightarrow Heading 2 (inside the Styles gallery):

8	ნ (Ť				Joe's Retirement Party -	Message (HTML)		<u></u>			×
File	Message		Options	Format Text	Review							
Paste	Aa HTML Aa Plain Teo Aa Rich Teo	t B	ori(E + 11 <i>I</i> <u>U</u> abc :	• A [*] A [*] Aa • •, x ² ⁴ ⁄⁄⁄⁄⁄∕ <u>A</u>	* E	- ≝ - 1≣ - 1≣ = ≙↓ ¶ = = = ≇ - ≙ - ⊞ -	AaBbCcDc AaBbCcDc 1 Normal 1 No Spac	AaBbC AaB Heading 1 Hea	BbCcl ding 2 T Change Styles *	P Find * the select *	Zoom	
Clipboard 15	Format		F	ont	5	Paragraph 5		Styles	-0 G	Editing	Zoom	~

7. Center the selected text by clicking Format Text \rightarrow Center:

8	5 0	Ť	. ↓			Joe's Re	tirement Party - I
File	Message	Insert	Options	Format Text	Review	🛛 Tell me what y	ou want to do
Paste	Aa HTML Aa Plain Tex <i>Aa</i> Rich Text	Cam B	bria v 13 v I <u>U</u> abe x	$\begin{bmatrix} A^* & A^* \end{bmatrix} Aa + \begin{bmatrix} A^* & A^* \end{bmatrix} Aa + \begin{bmatrix} A^* & A^* \end{bmatrix}$		· ;= · *;= · €≡ = = = ;= ·	≆ 2↓ ¶ ⊉ • ⊞ •
Clipboard 🗔	Format		F	ont	Es l	Paragraph	Gr.

8. Now, you need to apply a new theme to this message so that it is more consistent. Click Options \rightarrow Themes \rightarrow Slice:

🗄 5 c² A 4 🕫	Joe's Retirement Party - Message (HTML) 🖽 😑 🗆 🗡	
File Message Insert Options Form	nat Text Review 🗘 Tell me what you want to do	
Colors Colors Color Color	Image: Second	
Aa Example	on nakking iv wore goons iv	
Office		٦
Aa Aa Aa Office Facet Integral		٦
Ion Board Organic Retrospect	ment party is planned for next Friday	
Aa Wisp	d'i noon in Boardroom C.	
Reset to Theme from Template	I wishes. Food and refreshments will be provided.	
Browse for Themes		
🙀 Save Current Theme		

9. With the new theme applied, you will see that the color of the text and WordArt now appears more consistent:



10. Click File \rightarrow Save As:



11. Use the Save As dialog box to save the message to your desktop as Activity 2-5 Complete. Close Microsoft Outlook 2016.

TOPIC F: Manage Automatic Message Content

Outlook also provides you with ways to create content that will be included in a new message by default, such as a signature or pre-designed stationery. Over the course of this topic, you will learn about this type of content and how to manage it.

Topic Objectives

In this topic, you will learn:

- About stationery and themes
- About font options
- About signatures

STATIONERY AND THEMES

The **Stationery** feature in Outlook allows you to apply a variety of different design templates to an outgoing message. These templates change the background of the message body to a selected color or pattern. While they are like themes, you are unable to create your own stationery and you are limited to the templates that are provided by default.
Themes offer a little more flexibility and can change a greater range of elements within a message. You can create a new theme from scratch or use one of the many default options. Additionally, themes can not only modify the background color of a message, but also its text, colors, and effects. (These themes are different than those applied from within the message itself.)

While stationery and themes can both be applied to outgoing messages on an individual basis, you also have the option to apply stationery templates and themes by default.

To create a single message using stationery or a theme, click Home \rightarrow New Items \rightarrow E-mail Message Using \rightarrow More Stationery:



This action will display the Theme or Stationery dialog box. Using the list on the left-hand side of this dialog box, you can choose the theme or stationery template that you would like to use to create the message:

Theme or Stationery			?	×
Choose a <u>Theme</u> : (No Theme) Afternoon Arctic Axis Bears (Stationery) Blends Blue Calm Blueprint Bold Stripes Breeze Canyon Capsules Cascade Compass Concrete Currency (Stationery) Deep Blue Echo Eclipse Edge Evergreen Expedition Garden (Stationery) Vivid Colors Active Graphics Sacade	Heading 1 style Sullet 1 Bullet 2 Bullet 3 Horizontal Line: Heading 2 style Regular Text Sample <u>Regular Hyperlink</u> <u>Followed Hyperlink</u>			-
		OK	Can	icel

Once you click the OK button, a new Message window will open with that stationery or theme applied. From there, you may construct your message as you would normally:



If you have found a theme or stationery template that you would like to use as the basis for all outgoing messages, you can have it automatically applied whenever you create a new message. To do this, first click File \rightarrow Options:



Inside the Outlook Options dialog box, click the Mail category. Then, click the "Stationery and Fonts" button:

Outlook Options	?	×
General Change the settings for messages you create and receive.		^
Mail		
Calendar Compose messages		
Groups Change the editing settings for messages.	Editor Options	
People <u>C</u> ompose messages in this format: HTML V		- 1
Tasks		- 11
Search ABC Always check spelling before sending	pelling and Autocorrect.	
Language		
Advanced	Circutture	5
Customize Ribbon	si <u>gn</u> atures	
Quick Access Toolbar	Ctationen and Easts	
Add-ins	Stationery and ronts	
Trust Center Outlook panes		
Customize how items are marked as read when using the Reading Pane.	<u>R</u> eading Pane	
Message arrival		
When new messages arrive:		
Briefly change the mouse pointer		
Sho <u>w</u> an envelope icon in the taskbar		
✓ Display a Desktop Alert		
Enable preview for <u>Rights</u> Protected messages (May impact performance)		
Conversation Clean Up		~
	OK Ca	ancel

This action will open the Signatures and Stationery dialog box to the Personal Stationery tab:

Signatures and Stationery		?	×
E-mail Signature Personal S	tationery		
Theme or stationery for new H	TML e-mail message		
Theme No theme cu	irrently selected		
Font: Use theme's font			\sim
New mail messages			
<u>F</u> ont	Sample Text		
Replying or forwarding messa	ges		
F <u>o</u> nt	Sample Text		
Mark my comments with:	John Smith		
Pick a new <u>c</u> olor when re	plying or forwarding		
Composing and reading plain	text messages		
Fo <u>n</u> t	Sample Text		
		ОК	Cancel

Click the Theme button near the top of the dialog box to display the Theme or Stationery dialog box. From the list on the left of this dialog box, you can choose the theme or stationery template that you would like to have automatically applied to all future messages that you create:

Theme or Stationery		?	×
Theme or Stationery Choose a <u>Theme</u> : (No Theme) Afternoon Arctic Axis Bears (Stationery) Blends Blue Calm Blueprint Bold Stripes Breeze Canyon Capsules Cascade Compass Concrete Currency (Stationery) Deep Blue Echo	Sample of theme Afternoon: Heading 1 style • Bullet 1 • Bullet 2 • Bullet 3 Horizontal Line: Heading 2 style Regular Text Sample Regular Hyperlink	?	×
Eclipse Edge Evergreen Expedition Garden (Stationery) Vivid <u>C</u> olors Vivid <u>C</u> olors Active <u>G</u> raphics <u>B</u> ackground Image	Followed Hyperlink		Cancel

Click OK when you are finished. Click the OK button on the two subsequent dialog boxes and the selected theme or stationery template will now be applied to every new message that you create.

FONT OPTIONS

In addition to setting a default theme or stationery template for new messages, you also have the option to choose what font will be used when sending, replying to, or forwarding HTML-formatted messages. You can find the controls to modify these settings inside the Signatures and Stationery dialog:

Signatures and Stationery	?	×
E-mail Signature Personal Stationery		
Theme or stationery for new HTML e-mail message		
Theme No theme currently selected		
Font: Use theme's font		\sim
New mail messages		
Eont Sample Text		
Replying or forwarding messages		
Font Sample Text		
Mark my comments with: John Smith		
Pick a new <u>c</u> olor when replying or forwarding		
Composing and reading plain text messages		
Font Sample Text		
ОК	Ca	ncel

(Remember, to open this dialog box, open the Outlook Options dialog box first. Then, click the Mail category and click the "Stationery and Fonts" button.)

To set the default font for each type of mail message, choose one of the bottom two options from the first menu:

Signatures and Stationery	?	×
E-mail Signature Personal Stationery		
Theme or stationery for new HTML e-mail message		
Iheme Afternoon		
Font: Use theme's font		\sim
Use theme's font New mail lice my font when replying and forwarding messages	_	
Fo		
Replying or romanany messages		
Font Sample Text		
Mark my comments with: John Smith		
Pick a new <u>color</u> when replying or forwarding		
Composing and reading plain text messages		
Font Sample Text		
ОК	Clo	ose

Then click the Font button for the type of message that you want to modify:

Signatures and Stationery	2	×
E-mail Signature Personal Stationery		
Theme or stationery for new HTML e-mail message		
Iheme Capsules		
Font: Always use my fonts		\sim
New mail messages		
Eont Sample Text		
Replying or forwarding messages		
Font Sample Text		
Mark my comments with: John Smith		
Pick a new <u>color</u> when replying or forwarding		
Composing and reading plain text messages		
Font Sample Text		
	ОК	Close

Then, you will see the Font dialog. Here, you can customize all aspects of your font:

Font	? ×
Font Advanced	
Eont: +Body +Body +Headings Agency FB Algerian Arial Font <u>c</u> olor: Effects Strikethrough Double strikethrough Superscript Superscript Preview	Font style: Size: Regular Halic Bold Bold Italic Underline color: No Color Small caps All caps Hidden
	Sample Text
Set As Default	OK Cancel

Once you are done, click OK to return to the Signatures and Stationery dialog. Then, click OK in all open dialogs to apply your changes.

SIGNATURES

Signatures are commonly used by many organizations to automatically add personalized sender information to the end of every e-mail. The signature will typically identify the sender, as well as provide contact information. It may even include a picture or company logo. Keep in mind that you are not limited to one signature; you can create different signatures for different purposes. For example, you could create a signature for replying to incoming messages that is different from another signature that is used when sending a new message.

Creating a Signature

To start creating your signature, click File \rightarrow Options. Inside the Outlook Options dialog box, click the Mail category and then click the Signatures button:

Outlook Options	?	×
General Change the settings for messages you create and receive.		^
Mail		
Calendar Compose messages		
Groups Change the editing settings for messages.	tions	
People <u>Compose messages in this format</u> : HTML v		-
Tasks		
Search Search Spelling before sending Spelling and Autoco	orrect	
Language		
Advanced	tures	
Customize Ribbon	6	

This action will open the E-Mail Signature tab of the Signatures and Stationery dialog. To start creating your signature, click the New button:

gnatures and Sta	lionery	?	>
-mail Signature	Personal Stationery		
ele <u>c</u> t signature t	o edit Choose default signature		
	E-mail account: jsmith@acmewidg	gets.onmicrosoft.com	`
	New <u>m</u> essages: (none)		•
	Replies/ <u>f</u> orwards: (none)		`
Delete dit signature	New Save Rename		
Calibri (Body)	V 11 V B I U Automatic V = = = = Business	Card 📑 🖶	
			1
	_		
		OK Can	cel

You will then be prompted to name your signature:

New Signature	?	\times
Type a name for this sign	nature:	
	Ca	ncel

Once you type a name and click OK, you will be returned to the Signatures and Stationery dialog. You can now use the bottom set of options to type and format your text. Once you're ready, click OK to complete the signature:

Signatures and Stationery	?	×
E-mail Signature Personal Stationery		
Sele <u>c</u> t signature to edit Choose default signature		
Default E-mail account: jsmith@acmewidgets.onmicros	oft.com	\sim
New <u>m</u> essages: (none)		\sim
Replies/forwards: (none)		\sim
Delete New Save Rename		
Edit signature		
Calibri (Body) V 11 V B I U Automatic V = = = I Business Card	A	
Joe Smith		^
CEO Acme Widgets Co		
Achie Wugets co.j		
		Ŧ
ОК	Cano	el:

Setting Signature Options

If you examine the options on the right-hand side of the Signatures and Stationery dialog, you will see a variety of different controls:

Signatures and Stat	tionery			?	Х
<u>E</u> -mail Signature	Personal Stationery				
Sele <u>c</u> t signature to	o edit		Choose default sign	nature	
Default		^	E-mail <u>a</u> ccount:	jsmith@acmewidgets.onmicrosoft.com	\sim
			New <u>m</u> essages:	(none)	\sim
			Replies/ <u>f</u> orwards:	(none)	\sim
Delete	New Save	Rename			
_	2	<u>_</u>			

The top menu is used to choose what e-mail account you want to set signature options for. Then, you can choose what signature you want to use for new messages, as well as replies and forwards. Once your options are set, click OK.

Using Signatures

If you've set a signature as the default in the Signatures and Stationery dialog, it will be added automatically to the appropriate type of message (new messages and/or replies and forwards). To add a signature to a message manually, click Insert \rightarrow Signature \rightarrow [Signature]:



You can also click the Signatures command in this drop-down menu to open the Signatures and Stationery dialog.

ACTIVITY 2-6

Managing Automatic Message Content

Now that you have become comfortable with using Outlook 2016, you would like to start customizing it to suit your own needs. To start, you need to create a signature and then create a new message.

1. To begin, open Outlook 2016:



2. Click File \rightarrow Options:



3. In the Outlook Options dialog box, click the Mail category:



4. With the Mail category now displayed within the Outlook Options dialog box, click the Signatures button:

Outlook Options	?	×
General Mail	Change the settings for messages you create and receive.	^
Calendar	Compose messages	
Groups People	Change the editing settings for messages.	5
Tacks	Compose messages in this format:	- 1
Search	ABC Always check spelling before sending Spelling and Autocorrect	t
Language	Ignore original message text in reply or forward	
Advanced	Create or modify signatures for messages.	5
Quick Access Toolbar	Use stationery to change default fonts and styles, colors, and backgrounds.	5
Trust Center	Outlook panes	
nut center	Customize how items are marked as read when using the Reading Pane.	ž
	Message arrival	
	When new messages arrive: Play a sound	
	Briefly c <u>h</u> ange the mouse pointer	
	Show an envelope icon in the taskbar	
	 Usplay a Uesktop Alert Enable preview for Bights Protected messages (May impact performance) 	
	Conversation Clean Up	~
	ОК	Cancel

5. The Signatures and Stationery dialog box will now be shown with the E-mail Signature tab displayed:

mail Signature	Personal Statione	ry				
ele <u>c</u> t signature t	o edit			Choose default sigr	nature	
			~	E-mail <u>a</u> ccount:	jsmith@acmewidgets.onmicrosoft.com	1
				New <u>m</u> essages:	(none)	`
				Replies/forwards:	(none)	`
Delete	New	C	×			
Delete	New	Save	кепате			
li <u>t</u> signature						
Calibri (Body)	✓ 11 ✓ B	ΙU	Automatic		🔠 Business Card	
						1
						1

6. Click the New button:

mail Signature	Personal Statio	nery					
le <u>c</u> t signature t	o edit				Choose default sigr	nature	
				~	E-mail <u>a</u> ccount:	jsmith@acmewidgets.onmicrosoft.com	`
					New <u>m</u> essages:	(none)	`
					Replies/ <u>f</u> orwards:	(none)	`
Delete it signature	New	Sav	Ê	Rename			
Calibri (Body)	✓ 11 ✓	B I	U	Automatic		🔠 Business Card 🛛 🔒	
							1

7. The New Signature dialog box will now be displayed. Type "Default" as the name for the new signature that you are creating and then click OK:

New Signature	?	\times
<u>T</u> ype a name for this sign Default	nature:	
ОК	Ca	ncel

8. With a new signature created, you can begin customizing it using the controls in this dialog. Click inside the "Edit signature" text area and type your name:

inatures and Stat	tionery				?	×
-mail Signature	Personal Stati	onery				
ele <u>c</u> t signature to Default	o edit		~	Choose default sigr E-mail <u>a</u> ccount:	nature ismith@acmewidgets.onmicrosoft.com	n 🗸
				New <u>m</u> essages:	(none)	~
<u>D</u> elete	New	<u>S</u> ave	∨ <u>R</u> ename	Replics/ <u>f</u> orwards.	(none)	~
di <u>t</u> signature Calibri (Body)	✓ 11 ✓	B I <u>U</u>	Automatic		🔠 Business Card	•
John Shindi						
						~

9. Select your name and then click the Bold button just above the text area:

Signatures and Stationery	?	×
E-mail Signature Personal Stationery		
Select signature to edit Choose default signature		
Default E-mail account: jsmith@acmewidgets.onmicro	soft.com	\sim
New <u>m</u> essages: (none)		~
Replies/forwards: (none)		\sim
Delete New Save Rename		
Edit signature		
Calibri (Body) V 11 V B I U Automatic V = = = = Business Card	A	
John Smith		^
		~
		_
ОК	Can	cel

10. Click at the end of your name and press the Enter key on your keyboard to create a new line. Type your job title:

gnatures and Sta	tionery				?	×
-mail Signature	Personal Stationery					
ele <u>c</u> t signature t	o edit			Choose default sign	nature	
Default			^	E-mail <u>a</u> ccount:	jsmith@acmewidgets.onmicrosoft.com	\sim
				New <u>m</u> essages:	(none)	\sim
			~	Replies/ <u>f</u> orwards:	(none)	\sim
<u>D</u> elete	New	<u>S</u> ave	<u>R</u> ename			
di <u>t</u> signature						
Calibri (Body)	✓ 11 ✓ B	ΙU	Automatic		🔠 Business Card 🛛 📑 🖶	
John Smith						1
Student 🔶	-					1
						~
					OK Can	cel

(If you do not have a job title, type "Student.")

11. Press Enter to create a new line. Type your city and state/province:

Signatures and Sta	tionery					?	×
<u>E</u> -mail Signature	Personal Stationery						
Sele <u>c</u> t signature to	edit		Choose default sign	nature			
Default		^	E-mail <u>a</u> ccount:	jsmith@acmew	idgets.onmicros	oft.com	\sim
			New <u>m</u> essages:	(none)			\sim
			Replies/ <u>f</u> orwards:	(none)			\sim
<u>D</u> elete	<u>N</u> ew <u>S</u>	ve <u>R</u> ename					
Colibri (Rodu)	11				-	0	
Calibit (Body)				<u>B</u> usine	ss Card	ŝ	_
John Smith							^
Student New York, N.	Y.						
					ОК	Cano	↓ :el

12. With the signature now complete, click the OK button in the lower right-hand corner of the dialog box:

ignatures and Stat	ionery	?	×
<u>E</u> -mail Signature	Personal Stationery		
Sele <u>c</u> t signature to	o edit Choose default signature		
Default	E-mail account: jsmith@acmewidgets.	onmicrosoft.com	\sim
	New <u>m</u> essages: (none)		~
	Replies/forwards: (none)		~
<u>D</u> elete	<u>N</u> ew <u>S</u> ave <u>R</u> ename		
di <u>t</u> signature —			
Calibri (Body)	✓ 11 ✓ B I U Automatic ✓ Ξ Ξ Ξ Business Card	📑 😤	
John Smith Student New York, N.	Υ.		^
			~
	0	K Can	cel

13. Back in the Outlook Options dialog box, click OK:

erformance)		
	ок 💦	✓ Cancel

14. Now, you need to create a new e-mail to test out the signature that you just created. You would also like to see what kind of stationery templates are available. Back in the main Outlook 2016 window, click Home → New Items → E-mail Message Using → More Stationery:



15. The Theme or Stationery dialog box will now be displayed. Scroll down in the list box on the left side of it and then click to select the Soft Blue (Stationery) option. You will see a preview of how this stationery template will look:



16. In the lower right-hand corner of the Theme or Stationery dialog box, click the OK button:

Theme or Stationery		?	×
Choose a <u>T</u> heme:	Sample of stationery Soft Blue:		
Profile Quadrant Radial Refined Rice Paper Ripple Romanesque Roses (Stationery) Satin Sea Marble (Stationery) Shades of Blue (Stationery) Sky Slate Soft Blue (Stationery) Staring Staris (Stationery) Water Watermark Vivid Colors Active Graphics Background Image			
	ОК	Can	cel

17. A new Message window will open with the selected stationery template applied. Additionally, you will see the signature that you configured earlier in this activity:

							Untitled - Message (HTML)					
	Message	Insert	Options	Format Text	Review	C Tell me what y	ou want to do					
Paste	X Cut E Copy ≪ Format Painte	B	I <u>U</u> ªZ	A [*] A [*] Ξ A + Ξ Ξ Parist Test	· E · &	Address Check Book Names	Attach Attach Signature File * Item * *	Follow Up * High Importance Low Importance	Office Add-ins			
	Ippoard	12		Dasic lext		Ndmes	Include	lags 1 ₂	Add-Ins			^
Send	Cc											
John Stude New	Smith ent York, N.Y.											

18. Click File \rightarrow Save As:



19. Use the Save As dialog box to save the message to your desktop as Activity 2-6 Complete. Close Microsoft Outlook 2016.

Summary

Over the course of this lesson, you learned about the various tools that you can use to compose new messages in Outlook 2016. You should now feel comfortable creating a new e-mail message from scratch, as well as checking a new message for spelling or grammar errors. Additionally, you should feel comfortable using the many formatting tools that are available to enhance your message. Finally, you should also be able to attach different file types to an outgoing e-mail message, as well as manage automatic message content (such as signatures and stationery templates).

LESSON 3: READING AND RESPONDING TO MESSAGES

Lesson Objectives

In this lesson you will learn how to:

- Customize reading options
- Work with attachments
- Manage your message responses

TOPIC A: Customize Reading Options

Outlook 2016 includes several different ways in which you can read messages that you receive. While the default settings may work for most people, being familiar with all the available reading methods can come in handy. Over the course of this topic, you will learn how to customize reading options.

Topic Objectives

In this topic, you will learn:

- About desktop alerts
- About pane views
- About Message Preview
- About conversations
- About mail options

DESKTOP ALERTS

You may have already seen a desktop alert shown while you have been working with Outlook 2016. These alerts are small notifications that appear when a new message or Outlook item appears inside of your inbox. This pop-up notification will provide you with a brief description of the item and will appear above any currently displayed windows:



If the desktop alert concerns an e-mail message, you will see who the sender is, the message subject line, and a few lines from the body of the message. Clicking on the alert will display the message in a separate message window.

While desktop alerts are enabled by default, you do have the option to disable them. You can find this setting inside the "Message arrival" section of the Mail category in the Outlook Options dialog box.

Other Message Arrival Notifications

There are also other message arrival notifications that can be enabled. For example, you can have a specific sound played, temporarily change the appearance of your mouse cursor, and/or display an envelope icon in the system tray area of the taskbar.

PANE VIEWS

Outlook includes several different panes that make up the primary Outlook 2016 window, each of which can be configured separately. These panes are modified using the commands in the Layout group of the View tab:

	麕	5	÷				h	nbox - jsmith@acn	ewidgets.onmicrose	oft.com - Outlook			• -	□ ×
				Send / Receive Folder	View	♀ Tell me what you								
•	Shange View *	View Settings	Reset View	Show as Conversations Conversation Settings -	Message Preview	Date	From	🚰 Io 🔚 Size	Catggories	 ↑↓ Reverse Sort ⇒ Add Columns ⇒ += Expand/Collapse * 	Folder Reading To-D	People	Reminders Open in New Close	
T.	a	irrent Vier	N	Messages				Arrangement			Lavout	People Pane	Window	~

Using the **Folder Pane**, **Reading Pane**, and **To-Do Bar** drop-down commands, you are able to minimize those panes or remove them completely from the Outlook 2016 window. This has the effect of providing more space for the Reading pane and the main working area.

The Options command in the Folder Pane drop-down menu will display the Navigation Options dialog box:

Navigation Options	×
Maximum number of visible items: 🚺 🚖 🗹 Compact Navigation	-
Display in this order	
Mail	Move Up
Calendar People Tasks	Move Down
Notes Folders Shortcuts	
Reset OK	Cancel

Using the controls in this dialog box, you can choose what buttons will populate the bottom of the Navigation pane. You can also toggle Compact Navigation (which will show icons instead of workspace names) on or off.

The **Reading Pane** drop-down command allows you to dock this pane to the right of the working area or at the bottom of it, as well as turn it off. Clicking the Options command will display the Reading Pane dialog:

Reading Pane						
Reading Pane options Mark items as read when viewed in the Reading Pane Wait seconds before marking item as read						
 ✓ Mark item as read when selection changes ✓ Single key reading using space bar ✓ Turn on automatic full-screen reading in portrait orientation 						
OK Cancel						

Using the controls in this dialog box, you can choose if items are marked as read when they are viewed in the Reading pane and modify a few other settings.

You can also choose how items in the workspace are arranged using the options in the Arrangement group of the View tab. For example, if you wanted to view all your received messages sorted by their individual subject lines, you would click the Subject option:

Æ	Date	Erom	<u>⊊a</u> o	Cat <u>eg</u> ories	*	↑↓ Reverse Sort
Message Preview *	► Flag: Start Date	▶ Flag: D <u>u</u> e Date	I 🖬 Size	Subject	* *	 Add Columns Expand/Collapse
Theview			Arrangement			

As well, you can customize the specific fields shown by right clicking the column headers at the top of the workspace list:



Message Preview

Message Preview is used to display the first few lines from a message, in the message list, just below the message's subject line. By default, this feature will display just one line:



If you would like to display two or three lines instead, click View \rightarrow Message Preview \rightarrow [Line Count]:



You will then be asked if you would like to change the message preview settings for only the current folder or your whole mailbox:



Here, you can see how a message is displayed when the message preview displays two lines:



CONVERSATIONS

Conversations continue to be a way to organize messages in Outlook 2016. This feature groups all sent and received e-mails that share the same subject line. By grouping these messages together under the same subject line, you are able to follow a discussion in a more linear fashion as a thread.

It also helps keep your inbox much more organized by having multiple messages from multiple people with the same subject contained to one entry. Additionally, if you receive new e-mail that is part of a previous discussion, that discussion will automatically be moved to the top of the message list.

Conversations are identified by a small arrow icon adjacent to a message listing in the working area:



Clicking this arrow will expand or collapse the conversation. Here is an example of a conversation that has been expanded:



(Note that if an existing conversation receives a new message, the subject line will be bolded.)

The Conversations feature is not on by default, but it can be toggled on (or off) by clicking View \rightarrow Show as Conversations:



This action will display a dialog box where you can choose to arrange the items by conversation in the current folder or all folders in your mailbox:



After clicking on one of these options, the Conversations feature will be enabled.

Split Conversations

When a conversation contains more than one conversation thread, it is referred to as a **split conversation**. For example, if someone replies to the first message that initiated a conversation rather than replying to a more recent one, a split conversation will occur.

MAIL OPTIONS

Many of the settings that control how messages are sent and received are accessed via the Outlook Options dialog box. To open this dialog box, click File \rightarrow Options:



With the Outlook Options dialog box displayed, click the Mail category. You will see that this category includes several different sections:

Outlook Options		?	×
General Mail	Change the settings for messages you create and receive.		^
Calendar Com	npose messages		
Groups	Change the editing settings for messages.	Editor Option	S
People	Compose messages in this format:		
Tasks AI Search	BC Always check spelling before sending	ng and Autocorrec	t
Language	☑ Ignore original message text in reply or forward		
Advanced	Create or modify signatures for messages.	Si <u>gn</u> ature	s
Quick Access Toolbar	Use stationery to change default fonts and styles, colors, and backgrounds.	tationery and <u>F</u> ont	5
Add-ins Trust Center Out	look panes		
	Customize how items are marked as read when using the Reading Pane.	<u>R</u> eading Pan	e
Mes	ssage arrival		
	When new messages arrive: ☑ Play a sound		
	Briefly change the mouse pointer		
	\checkmark Sho <u>w</u> an envelope icon in the taskbar		
	✓ Display a Des <u>k</u> top Alert		
	Enable preview for <u>Rights</u> Protected messages (May impact performance)		
Con	versation Clean Up		~
	[ОК	Cancel

Below is a breakdown of the settings that you will find in each section of the Mail category:

- Compose messages: This section contains controls to modify the editing settings for a message (HTML, Rich Text, or Plain Text); configure how spelling and AutoCorrect tools operate; access signature options; and customize the stationery and fonts that are used for new messages.
- Outlook panes: This section contains just one button that is used to customize how the Reading pane operates.
- **Message arrival:** Here, you can modify what happens when a new message is received by Outlook.
- Conversation Clean Up: In this section you can control how the conversation clean up tool works. This includes controlling what type of messages are moved and choosing where cleaned up items are moved to.
- Replies and forwards: This section controls what kind of information is included when you choose to reply or forward a received message. By default, the original message will be included whenever you forward or reply to a message.
- Save messages: In this section you can control how and when a message is saved as you are composing it.
- **Send messages:** This section contains options to modify the default importance and sensitivity of any messages that you send, amongst many other similar settings.
- MailTips: In this section you will be able to control when and how MailTips are displayed.
- **Tracking:** In this section you will see controls that are used to configure how delivery and read receipts are handled.
- **Message format:** The settings in this section control the underlying formatting of a message.
- **Other:** The last section in the Mail category includes a mix of controls that are used to modify paste options, Next and Previous button display, and more.

ACTIVITY 3-1

Customizing Reading Options

You would like to tweak Outlook's reading options in a few different ways to better match your own preferences.

1. To begin, open Microsoft Outlook 2016:



2. Hide the Favorites section in the Navigation pane by clicking the arrow (⁴) that appears next to the Favorites title:

Favorites
Inbox 4
Clutter
Sent Items
Drafts
▲ jsmith@acmewidgets.onmicr
Inbox 4
Drafts
Sent Items
Deleted Items 12
Clutter
Conversation History
Junk Email
Outbox
RSS Feeds
▷ Search Folders
▷ Groups

(If no Favorites are currently configured, skip to the next step.)

3. Adjust the Reading pane so that it appears below the message list by clicking View \rightarrow Reading Pane \rightarrow Bottom:

- E	2	¢	٠				L.	nbox - jsmith@acm	newidgets.onmicros	oft.com - Outlook				Ś.		10-0	×
F				Send / Receive Folder	View	🖓 Tell me what you											
Cha	→ nge w [*]	View Settings	Reset View	Show as Conversations Conversation Settings -	Message Preview *	Date	Erom Flag: Dige Date	🚰 Io 🖼 Size	Catggories		Folder Pane *	Reading To-Do Pane * Bar *	People Pane *	Reminders C Window	tpen in New Window	Close All Items	
	Cur	rent Vie	N	Messages				Arrangement				Bight	ople Pane		Window		~
												Bottom					

4. The Outlook 2016 window will now look like this:

The Number Open Participation The Participation Participation Participation Participation Participation Participation Participation Participation<		Inbar - jsmith@acmewidgets.onmicrosoft.com - Outlook	
Concertains failing C	File Home Send / Receive	Folder View Q Tell me what you want to do	
Formits F	Change View Reset View - Settings View Current View	versations Protect P fugs Same P fugs Same P fugs Same P fugs P fugs P fugs Same P fugs P f	iose items
Note 4 Image: Control of the contro	∡ Favorites <	All Unread Search Courset Mathem Chile D	Current Mailbox
Cutor • Set Triang Cutor • Set Triang Data • Set Triang Cutor • Set Triang Cutor • Set Triang Cutor • Set Triang Cutor • Set Triang • Set Triang • Set Triang	Inbox 4	I CATEGORIES INCOMENTATION I SUBJECT INCOMENTATION I SUBJECTI I SUB	
Set Revue Duels Duels state of the set reverse the set of th	Clutter	A Date: Today	
 I due Testing <lii due="" li="" testing<=""> <lii due="" li="" testing<=""> I due Test</lii></lii>	Sent Items Drafts	Q. E John Smith Joe's Retirement. Hey all, Joe is going to be retiring soon, so I thought we could through a small celebration. Please let me know your availability for next week. Thanks, John <end></end>	P
In the second secon		Date: Yesterday	
back 4 Data Data Serie here Default Nerse Default Nerse <td>▲ jsmith@acmewidgets.onmicr</td> <td>John Smith Requested Documents Wed 10/7/2015 12:39 PM 31 KB</td> <td>⊫</td>	▲ jsmith@acmewidgets.onmicr	John Smith Requested Documents Wed 10/7/2015 12:39 PM 31 KB	⊫
Set from • Date Manage Outlow Set and King Outlow Set and King Control Set and King Control Main Subin State Subin Main Subin Data Subin Set Subin Data Subin Main Subin Da	Inbox 4 Drafts	Ca ⓑ John Smith Joe's Retirement Wed 10/72015 12:35 PM 40 KB Hey all, Joe is going to be retiring soon, so I thought we could through a small celebration. Please let me know your availability for next week. Thanks, John <end></end>	⊫
Cutor mm m	Sent Items Deleted Items 12	Date: Monday John Smith Joe's Retirement Mon 10(5/2015 1:25 PM 24 KB	lb.
Concentration Hillow has faal • Date Lake Medi has faal Channel Bissel Golden • Date Lake Medi has faal Date Lake Medi Bissel Channel Dissel Bissel • Date Lake Medi • Date Lake M	Clutter	Hey sit, Joe is going to be retiring soon, so i thought we could through a small celebration. Hease let me know your availability for next week. Inshiks, John Kena>	P
a bat ford Det Kodel fords det inter. Det Kodel fords det inter. Det Kodel fords det inter. D date Det Kodel fords det inter. Det Kodel fords det inter. Det Kodel fords det inter. D date Det Kodel fords det inter. Det Kodel fords det inter. Det Kodel fords det inter. D date Det Kodel fords det inter. Det Kodel fords det inter. Det Kodel fords det inter. D date Det Kodel fords det inter. Det Kodel fords det inter. Det Kodel fords det inter. D date forder Det Kodel fords det inter. Det Kodel fords det inter. Det Kodel fords det inter. D date forder Det Kodel fords det inter. Det Kodel fords det inter. Det Kodel fords det inter. D date forder Det Kodel fords det inter. Det Kodel fords det inter. Det Kodel fords det inter. D date forder Det Kodel fords det inter. Det Kodel fords det inter. Det Kodel fords det inter. D date forder Det Kodel fords det inter. Det Kodel fords det inter. Det Kodel fords det inter. D date forder Det Kodel fords det inter. Det Kodel fords det inter. Det Kodel fords det inter.	Conversation History	Date: Last Week	
Outer • det older • Streads • det older • det older • det older	Junk Email	Microsoft Unite Seffic Tour versoft password nas been reset Lie 9/25/2015 Lie 9/25/2005 Lie 9/25/20000000000000	
SS feeds 9 Sanch Falders 9 Sanch Falders 0 in Symbol 9 Googe 0 in Symbol 0 in Symbol 0 in Symbol	Outbox	A Date: Older	v
B same folders	RSS Feeds		
Provingeleta to the message on 104/2015 108 PM. Schedulador Schedulador Action terms A	 Search Folders Groups 	Leg key / Eg key / All Eg Formid John Smith <a and="" bridge="" jack="" sectio<="" section="" some="" start="" td=""><td>0 1 12:06 PM</td>	0 1 12:06 PM
the set of the se		You replied to this message on 10/8/2015 1:06 PM.	~
Action here:		Scheduld.docx .	
Hey all, Joe is going to be retring soon, so I thought we could throw a small celebration. Please let me know your availability for next week. Thanks, There is 0 upward		Action Items	+ Get more apps
Joe is going to be retring soon, so I thought we could throw a small celebration. Please let me know your availability for next week. Thanks, There 12. Downat 4		Hey all,	*
Thanks,		Joe is going to be retiring soon, so I thought we could throw a small celebration. Please let me know your availability for next week.	
item: 12 Unread: 4 All folders are up to date. Connected to: Microsoft Exchange 🔲 🐘	🔤 🖩 🕹 🖸 ····	Thanks,	*
	Items: 12 Unread: 4	All folders are up to date. Connected to: Microsoft Exchange 🔲 💵 =	+ 100%

5. Now you would like to modify how columns are displayed in the current message list. Click View → Add Columns:



6. The Show Columns dialog box will now be displayed. In the list on the right-hand side of this dialog box, click Attachment and then click the Move Down button twice:

Show Columns		×
Maximum number of lines in co	ompact mode: 2 🗸	•
Select available columns from:		
Frequently-used fields 🗸 🗸]	
Available columns:	-	Show these columns in this order:
Auto Forwarded	Add ->	Importance A
Contacts Conversation	<- Remove	Icon From
Created		Attachment
Do Not AutoArchive Due Date Flag Completed Date Follow Up Flag	New Column	Subject Received Size Categories
IMAP Status		Flag Status
Originator Delivery Reques		
Read		
Received Representing Nai 🗡		×
Properties Delete		Move Up Move Down
		OK Cancel

7. The Attachment column will now be after the Subject column, but before the Received column. Click OK to apply the new settings:

Show Columns	×								
Maximum number of lines in compact mode: 2									
Select available columns from:									
Frequently-used fields 🗸									
Available columns:	Show these columns in this order:								
Auto Forwarded Cc Contacts Conversation Created Do Not AutoArchive Due Date Flag Completed Date Follow Up Flag IMAP Status Message Originator Delivery Reques Read	Importance Reminder Icon From Subject Attachment Received Size Categories Flag Status								
Received Representing Nai 🗡	×								
Properties Delete	Move Up Move Down								
	OK Cancel								

8. Examine the message list of the Outlook 2016 window. You will see the new column:

ALIAN PALAN AND							100	
I LI FROM	SUBJECT	0	RECEIVED		SIZE	CATEGORIES	Y	. IA
A Date: Today		1						
🔒 John Smith Hey all, Joe is going	Joe's Retirement to be retiring soon, so I thought we could through a small celebration. Please let me know your availability (for next w	J Thu 10/8/2015 12:0 reek. Thanks, John	7 PM <end></end>	39 KB		₽	
4 Date: Yesterday								
John Smith	Requested Documents	0	Wed 10/7/2015 12:	39 PM	31 KB		►	

9. Next, you would like to arrange the items in the message list by the sender. Display the View tab. Within the Arrangement gallery, click the From option:

F	¢	÷					Ir	nbox - jsmith@acme	widgets.onmicrosol	ft.com - Outlook
File	Horr	ie :	Send / Receive	Folder	View	🔉 Tell me what you	want to do			
G Change View *	View Settings	Reset View	Conversation	wersations	Message Preview *	■ Date ► Flag: Start Date	Erom	⊊ <mark>a</mark> <u>I</u> o I⊟ <u>S</u> ize	Cat <u>e</u> gories	 ↑↓ Reverse Sort
CI	urrent Viev	v	Messac	ies				Arrangement		

10. You will see the new arrangement now applied to the message list:

All Unread	Search Current Mailbox (Ctrl+E)		P	Current Mailbox
! 章 臣 FROM A SUBJECT	() RECEIVED	SIZE	CATEGORIES	8
 From: John Smith: 4 item(s) 				
Q John Smith Joe's Retirement Hey all, Joe is going to be retiring soon, so I thought we could through a small celebration. Please let me know yo	() Thu 10/8/2015 12:07 PM pur availability for next week. Thanks, John <end></end>	39 KB		►
John Smith Requested Documents	Wed 10/7/2015 12:39 PM	31 KB		►
Gamma Joe's Retirement Hey all, Joe is going to be retiring soon, so I thought we could through a small celebration. Please let me know yo	Wed 10/7/2015 12:35 PM bur availability for next week. Thanks, John <end></end>	40 KB		►
John Smith Joe's Retirement Hey all, Joe is going to be retiring soon, so I thought we could through a small celebration. Please let me know yo	Mon 10/5/2015 1:25 PM our availability for next week. Thanks, John <end></end>	24 KB		►
 From: Microsoft Online Services Team: 1 item(s) 				
Microsoft Online Servi Your Velsoft password has been reset Password reset notification	Tue 9/29/2015 11:58 AM	41 KB [►
From: OneNote Team: 1 item(s)				
OneNote Team Welcome to OneNote Get OneNote for free on all your devices	Fri 7/31/2015 10:09 AM	39 KB		►

 Finally, you would like to change the duration that desktop alerts are displayed for. Click File → Options:



12. In the Outlook Options dialog box, click the Mail category:



13. Within the "Message arrival" section, ensure that the first four options are checked:



14. Click the OK button:

performance)		
		~
	ок 💦	Cancel

15. To restore the default view settings, click View \rightarrow Reset View:

	¢	Ŧ					lr	1box - jsmith@acme	ewidgets.onmicroso	ft.com - Outlook
File	Hom		Send / Receive Fo	lder	View	2 Tell me what you	want to do			
S Change	X View	Reset	Show as Convers	ations tings ~	Message	 □Date ▶ Flag: Start Date 	Erom Flag: D <u>u</u> e Date	<mark>⊊å</mark> <u>T</u> o I⊟ <u>S</u> ize	Cat <u>e</u> gories	Add Columns
View * Cu	Settings irrent Viev	view	& Messages		Preview *			Arrangement		expand, compac

16. When prompted, click Yes to reset the Compact view to its original settings:



17. Next, click View \rightarrow Reading Pane \rightarrow Right:

🛱 🕈 🔹	Inbox - jsmith@acmewidgets.onmicrosoft.com - Outlook		
File Home Send / Receive Folde	View Q Tell me what you want to do		
Change View Reset View Settings View	s Date & from Ra Jo H Categories 1 11 Reverse Sort - Message P Frage Start Date P Flag: Date Bale & Sobject V + Expand/Collapse +	Folder Reading To-Do Pe	copie Reminders Open in New Close ane * Window Window All Items
Current View Messages	Arrangement	Right op	ale Pane Window A
		Bettom Q Off Options	

18. Close Microsoft Outlook 2016.

TOPIC B: Work with Attachments

As e-mail is frequently used to send files, it's important to know how to work with those attachments. Over the course of this topic, you will learn how to use attachment preview, as well as how to print any attachments that you receive.

Topic Objectives

In this topic, you will learn:

- About attachment preview
- About printing attachments

ATTACHMENT PREVIEW

As the name suggests, the Attachment Preview feature is used to preview an e-mail attachment without having to open it in its native application. To preview an attachment, click on the attachment listing:

Image: Second state of the second s	() 1 2:13 PM
Documents.docx 195 KB	
Hey John,	
Here are the documents that you requested for review.	
Thanks,	
Joe	

A preview of the attachment will then be displayed in the Reading pane (if you have the correct software installed) and the Attachment Tools – Attachments tab will be shown on the ribbon:



(Like regular attachments, you should only preview files that you trust.)

If you are viewing an attachment in the Message window, the preview will be shown in the main body of the window:



You can switch back to the contents of the e-mail by clicking Attachment Tools – Attachments \rightarrow Show Message:

H	••		Atta	hment Tools				
File	e Message		Attachments		${\mathbb Q}$ Tell me what you want to do			
		2	R		×			
Open	Quick Print	Send To ▼	Save As	Save All Attachments	Remove Attachment	Сору	Show Message,	
			Action	15		Selection	Message	

PRINTING ATTACHMENTS

You can also print attachments directly from Outlook. To print an attachment, right-click its listing and click Quick Print:



Alternatively, if you are currently previewing a file that you would like to print, you can click Attachment Tools – Attachments \rightarrow Quick Print:



Either command sequence will display the Opening Mail Attachment dialog. You will be given the option to open the file or save it to your computer. One of these options must be selected before you can print the attachment:



(Note that if you click Save, you must choose a destination where you would like the attachment to be stored.)

In either case, the attachment will then be printed to your default printer using the default printing settings.

ACTIVITY **3-2** Working with Attachments

You have received an e-mail from a colleague that includes an attachment. You would like to preview this attachment to see what it contains and then print it to your default printer. Microsoft Word and a printer are required for this activity.

1. To begin, open Outlook 2016. Within your Exercise Files folder, double-click the Activity 3-2.msg file to open it. This message will be displayed in a separate Outlook window:

	Event Flyer Draft - Message (HTML)	⊞ - □ ×.
File Message Q Tell me what you want to do		
S Ignore Junk - Delete Reply Reply Forward More - All		
Delete Respond	Move Tags Ta Editing Zoom	^
John Smith <abcwidgets@outlook.com> Event Flyer Draft</abcwidgets@outlook.com>	abcwidgets@outook.com	₿ 1 4/9/2015 ✔
Activity 3-2.docx 0 bytes		
Hey Jason,		
Here is a copy of the draft for the event flyer that I have	been working on. Please let me know if you have any recommendations or concerns.	
Thanks,		
John		

2. Just below the subject line, click on the listing for the attachment:

	ن (5	Ť	ψ	Ŧ				Event Flyer	r Draft - N	lessage (H	TML)	
File	Messag	e Ç	P Tell m	ie what y	ou want to do								
ि Ignore ♣ Junk •	X Delete	Reply	Reply All	Forward	De Meeting	Move	💼 Rules - P OneNote î Actions -	Mark Unread	Categorize	Follow Up •	a Translate	✓ Find Find Related ▼ Select ▼	Zoom
Dele	te			Respond			Move		Tags	Gi Gi	E	diting	Zoom
John Smith <abcwidgets@outlook.com> abcwidgets@outlook.com Event Flyer Draft</abcwidgets@outlook.com>													
Ac 0 b	Activity 3-2.docx 0 bytes												

3. A preview of the file will now be displayed in the body of the Message window. Scroll through the preview to review it:



4. Click Attachment Tools – Attachments \rightarrow Quick Print:



5. The Opening Mail Attachment dialog box will now be displayed. Click the Open button:



- **6.** The associated application for this file (Microsoft Word in this case) will flash open and close. The file will then be printed to your default printer.
- 7. Close the Message window to complete this activity.
TOPIC C: Manage Your Message Responses

Outlook 2016 includes a variety of different features to help you manage responses that you receive from your messages.

Topic Objectives

In this topic, you will learn:

- About the InfoBar
- About voting and tracking options
- How to use the Resend and Recall commands

THE INFOBAR

As you have worked with Outlook 2016, you may have noticed the InfoBar. It is a small banner that appears just below the ribbon in the Message window. If you are viewing an item in the Reading pane, the InfoBar will be shown below the sender's name. It provides you with different information about the current item depending on the item type.

For example, if you are viewing a message, you might see the date and time that you replied to it or forwarded it to another person:

H	ن (J.	Ŷ	ψ	Ŧ		Joe's Ret	irement	- Messag	e (HTML)				W.		=	-	×
File	Messag	je (⊋ Tell n	ne what y	ou want to do													
ि ignore	X Delete	Reply	Reply	Forward	🖳 Meeting	Move to: ? Team Email	G To Manager ✓ Done ⅔ Create New	4 2 1	Move	Rules * P OneNote	Mark Unread	Categoriz	E Follow	a Translat	P Find Related → ke Select →	Zoom		
Delet	e			Respond		Qui	ck Steps	G,		Move		Tags	5		Editing	Zoom		~
You for	John Smith <a b<="" td="">																	
Sch 11	Schedule docr																	
Action It	Action Items + Get more apps																	

The InfoBar will also show you if the message has been flagged or if it has been categorized. If you are viewing an invitation to a meeting, you will see the date and time that you responded to the invitation, as well as the response that you sent.

VOTING OPTIONS

A unique feature in Outlook is the ability to add voting options to a message. Clicking Options \rightarrow Use Voting Buttons while creating a message allows you to add a basic poll to it:

⊟									Untitled	l - Message	(HTML)	
File	Messa	ge	Insert	C	ptions	Format Te	xt Review	♀ Tell	me what you war	nt to do		
Aa Themes	Colors A Fonts Effects		Page olor •	Bcc	å å From	Permission	Use Voting Duttons •	Request a Request a	Delivery Receipt Read Receipt	Save Sent Item To *	Delay Delivery	Direct Replies To
	Themes			Show	Fields	Permission	Approve;	Reject	15	Mo	re Option	is G
							Yes;No Yes;No;N	laybe				
							<u>C</u> ustom					

You can choose a few different default poll answers, including Approve; Reject, Yes;No, and Yes;No;Maybe. You can also choose to have your own custom responses if you wish by clicking the Custom option.

When a recipient receives a message that contains a poll, the InfoBar will display text that lets them know that they are to vote:

	5 (J	Ŷ	Ψ	÷			Poll - Mes	sage (HTI	ML)				Ng.	>		2=3		×
File	Messag	je 🤇	? Tell m	e what y	rou want t	to do													
ि Ignore रि Junk *	X Delete	Vote	Reply	Reply All	Forward	Meeting	Move to: ? Team Email & Reply & Delete	G To Manager ✓ Done ⅔ Create New	4	Move	🖶 Rules ▼ 💭 OneNote 🗊 Actions ▼	Mark Unread	Categorize	Follow Up *	ag Translate	P Find Related → Select →	Zoom		
Dele	te			Resp	ond		Qui	:k Steps	G,		Move		Tags	Es.	E	Editing	Zoom		~
D	John S Poll	mith	Joh	n Smith														2	2:29 PM
🚹 Vote b	y clicking	Vote in t	he Resp	ond grou	up above.														~

Responses to the poll will be sent to the sender, who can see the response in the InfoBar for the received message:

	5	U	Ŷ	Ψ	-		Yes	s: Poll - Me	essage (HTN	AL)				W.			-		×
File	Messag	je	♀ Tell n	ne what y	ou want to do														
🕞 Ignore 🎝 Junk *	X Delete	Reply	Reply	Forward	🖳 Meeting	Move to: ? Team Email	G To Manager ✓ Done ⅔ Create New		Move	Rules * OneNote Actions *	Mark Unread	Categorize	Follow Up *	Translate	ind elated * elect *	Zoom			
Dele	te			Respond		Qui	ck Steps	Ga (M	love		Tags	G	Editing		Zoom			~
	John S Yes: P	Smith 'oll	Jol	hn Smith														2	:30 PM
1 The set	nder respo	onded:	Yes. 🗲	_															~

The sender can view a cumulative result of the vote by opening the original message from the Sent Items folder and then clicking Message \rightarrow Tracking:



This action will show the results in the InfoBar of this message, along with detailed results in the main Message window:

File Messag	ा 🗘 🗘 प्र उ		Poll - Message (HTML)		e g			-	×
ि Ignore X So Junk ∗ Delete	Reply Reply Forward More *	Message Tracking	Move to: ? G To Manager Team Email J Done Reply & Delete Y Create New	4 > I•	Move	Mark Categorize Follow Unread • Up •	Translate	Zoom	
Delete	Respond	Show	Quick Steps	Fa	Move	Tags rs	Editing	Zoom	~
This message wa Reply Totals: Yes	as sent on 10/8/2015 2:29 PM. : 1; No 0; Maybe 0								
Recipient			Response						
John Smith			Yes: 10/8/2015 2:3	0 PM					

(To return to the normal message view, click Message \rightarrow Message.)

TRACKING OPTIONS

In addition to voting, Outlook also provides some tracking options inside the Tracking group of the Options tab in the Message window:



Checking the **"Request a Delivery Receipt"** checkbox lets you keep track of when an e-mail is delivered to the recipient. The **"Request a Read Receipt"** option works on the same premise, but it will send you a message when the recipient of the original message opens and reads it.

Both options are great to help you make sure that your recipient(s) receive and read your message; however, keep in mind that the recipient has some control over how this works. The recipient will know when you enable read receipts and if they wish, they can choose whether to send a confirmation notification, or to ignore the request entirely.

THE RESEND OPTION

There may come a time when you need to resend a message that you sent previously. For example, maybe you forgot to include a file attachment that you intended to add, or maybe you accidentally sent the message to the wrong address and it was sent back.

To resend a message, open the sent message from your Sent Items folder and then click Message \rightarrow Actions \rightarrow Resend This Message:



The contents of the original message (including the subject, message body, and any attachments) will then be transferred to a new Message window. From there you can then resend this message as required.

THE RECALL OPTION

Have you ever sent a message and then realized that you made some sort of mistake? It happens to the best of us! If you are using an Exchange Server mailbox, you can try to recall the message. This will stop the delivery of the message and give you the option to replace the message with a new one.

To use the recall option, first open the sent message from the Sent Items folder. Next, click Message \rightarrow Actions \rightarrow Recall This Message:

H	5	Q	Ŷ	ψ	Ŧ		RE: Joe's Re	etirement	- Messa	ige (HTML)	
File	Messa	ge 🤇	? Tell m	e what ye	ou want to do.						
िंह्र Ignore & Junk र	X Delete	Reply	Reply All	Forward	🖳 Meeting	Move to: ? Team Email Reply & Delete	 G Manager ✓ Done ✓ Create New 	4 F F	Nove	🖶 Rules ▼ 🔊 OneNote 🗈 Actions ▼	Mark Categoriz Unread
Dele	te		ł	Respond		Qui	ck Steps	Es.		Edit Mes	sage
										🦲 Recall <u>T</u> h	iis Message
										Tesend T	his Message 😡
										<u>V</u> iew in B	rowser
										Dther Ac	tions 🕨

Outlook will then provide more information on what it is about to do, and ask you if you want to send a new message in its place:

Recall This Message X
Some recipients may have already read this message.
Message recall can delete or replace copies of this message in recipient Inboxes, if they have not yet read this message.
Are you sure you want to
Delete unread copies of this message Delete unread copies and replace with a new message
Tell me if recall succeeds or fails for each recipient
OK Cancel

Upon clicking the OK button, Outlook will then delete unread copies of this message from the recipient's mailbox. If you chose to also replace it with a new message, you will be given the opportunity to edit the original message in the Message window and then send the finished copy. By default, you will receive a message if the recall was successful.

Summary

During this lesson, you learned how to read and respond to messages that you receive in Outlook 2016. You should now feel comfortable customizing the various reading options, including desktop alerts, conversations, and more. You should also now be able to preview attachments, as well as manage message responses. Finally, you should also feel comfortable with the concepts of resending and recalling a message and the limitations of these features.

LESSON 4: MANAGING YOUR MESSAGES

Lesson Objectives

In this lesson you will learn how to:

- Manage messages using tags, flags, and other commands
- Organize messages using folders

TOPIC A: Manage Messages Using Tags, Flags, and Other Commands

As you continue to use Outlook 2016 to manage e-mails, you may find that your inbox will quickly fill up. Without any way to differentiate important messages or identify messages that require follow-up, you can waste a lot of time. Over the course of this topic, you will learn about the various features in Outlook 2016 that you can use to manage messages.

Topic Objectives

In this topic, you will learn:

- How to mark messages as read and unread
- About color categories
- How to flag messages for follow-up and customize follow-up options
- About the Ignore Conversation command
- About the Clean Up commands

MARKING MESSAGES AS UNREAD/READ

Whenever a new message arrives in your Inbox, it will be unread until you open it in the Reading pane or in the Message window. You can quickly identify what messages are unread by the bold font and blue highlights:



While unread messages will automatically appear as read if you open them, you can mark a message as read or unread.

To do this, click to select the message from the working area and then click Home \rightarrow Unread/Read:

5 B	÷		Inbox - jsmith@acmev	widgets.onmicrosoft.com - Outlo	ook		
File	lome Send / Receive	Folder View 🖓 Tell me wha					
New New Email Items	ि Ignore Marclean Up + Delete Sunk +	Reply Reply Forward More *	Image: Move to: ? G To Manager Image: Team Email ✓ Done Image: Q Reply & Delete ✓ Create New	Move Rules OneNote	Unread/ Categorize Follow Read	Search People Address Book Filter Email •	Store
New	Delete	Respond	Quick Steps	Fa Move	v Tags	Find	Add-ins

COLOR CATEGORIES

To further organize your messages, you can assign them colored categories. These are completely customizable in that you can give them any title that you like. For example, you could color categorize any messages from your manager using a red category that you have labeled "Manager."

To assign an item to a category, first select the item(s) to categorize. Then, click Home \rightarrow Categorize \rightarrow [Category]:



The Clear All Categories option in this menu will remove all categories from the item. To clear a single category, click Categorize and click the category to remove from the item.

Alternatively, you can right click on a message within the working area and click Categorize \rightarrow [Category]:

John Smith		0 🗣		
Joe's Retirement Hey all, Joe is going	Ē	<u>С</u> ору		
Yesterday	P	Quick Print		
Laka Casikh	R	<u>R</u> eply		
Requested Document	R	Reply <u>A</u> ll		
	2	For <u>w</u> ard		
Jonn Smith Joe's Retirement	P	Mark as U <u>n</u> read		
Hey all, Joe is going		Ca <u>t</u> egorize	×.	<u>C</u> lear All Categories
4 Monday	►	Follow <u>U</u> p	F	Blue category
John Smith	B	Find Related	F	Green category
Joe's Retirement Hey all, Joe is going	4	Quick Steps	F	Orange category
A Last Week		Rule <u>s</u>	F	Purple category
- Last Week	۰-	Move	F	Red category
MICROSOTT ONLINE Your Velsoft passwor	N	One <u>N</u> ote		Yellow category
Password reset notifi	S	Move to Clutter		<u>A</u> ll Categories
∡ Older	(p	<u>l</u> gnore		Set <u>Q</u> uick Click
OneNote Team	20	Junk	×	
Welcome to OneNote Get OneNote for free	×	<u>D</u> elete		

If it is the first time that you are using a category, the Rename Category dialog box will open and prompt you to rename it. Additionally, you are given the option to apply a shortcut key if you wish:

Rename Category X
This is the first time you have used "Red category." Do you want to rename it?
Name: Red category
Color: Shortcut Key: (None) 🗸
Yes No

Color Categories and Conversations

A color category that is applied to any top-level message will also be applied to other messages within the same conversation. Outlook will display a dialog box that indicates this fact when you apply a color category to a conversation item:

Microso	Microsoft Outlook X								
This action will apply to all items in the selected conversation.									
	Don't show this message again								
OK Cancel									

You are still able to apply colored categories to the individual items in a conversation by selecting those messages.

Shortcut Keys

When you use a color category for the first time, you will be given the opportunity to assign it a keyboard shortcut:

Renam	e Category			×
This is t rename	he first time y it?	ou have used "Y	ellow category	" Do you want to
Name:	Yellow categ	ory		
Color:	·	Shortcut Key:	(None) 👋 🗸	*
			Yes	No

This shortcut key will allow you to apply an associated category to the selected Outlook item with just a few keystrokes.

FLAGGING MESSAGES FOR FOLLOW-UP

Outlook also features a handy tool that adds follow-up flags to your messages. This feature allows you to quickly see which messages require follow-up. It will also remind you to follow up by the specified deadline (today, tomorrow, this week, next week, etc.).

To mark a message for follow-up, select it and then click Home \rightarrow Follow Up \rightarrow [Follow-Up Flag]:



Once you add a follow-up flag, it will be visible in that message. A reminder (if applicable) will also be shown and displayed within the To-Do Bar. You can mark an item as complete by clicking the flag icon:

John Smith Joe's Retirement Hey all, Joe is going to be



FOLLOW-UP FLAG OPTIONS

There are several different follow up options that you can choose from:

- First Five Options: Set the date for the follow-up.
- **Custom**: Opens a dialog to set the type of flag, start time, due date, and reminder. Also has an option to clear an existing flag.
- Add Reminder: Add a reminder to this flag.
- Mark Complete: Change the flag to a checkmark to indicate that the follow up is complete.
- Clear Flag: Clear the existing flag; useful if you have flagged a message by accident.
- Set Quick Click: Control what happens when you click the flag icon in a folder.

Set Quick Click for Flags

If you find yourself using the same flag type repeatedly, you can assign it as a Quick Click for flags. Doing this allows you to apply this flag by clicking the flag icon that appears inside the listing for an Outlook item:



To assign the Quick Click flag type, click Home \rightarrow Follow-Up \rightarrow Set Quick Click:



This action will display the Set Quick Click dialog box. Using the drop-down menu, you can then choose the flag that you would like to assign as the Quick Click flag. Click OK to apply any new settings:

Set Quick	t Quick Click X				
When single-clicking on the Flags column, add the following flag:					
۲		Today 🗸 🗸			
OK Cancel					

THE IGNORE CONVERSATION COMMAND

Occasionally, you may find yourself part of a long and ongoing conversation that you do not have much stake in. Such a situation can clutter your mailbox and distract you with notifications. By selecting that conversation and then clicking Home \rightarrow Ignore, you will be able to ignore any new messages that are part of the conversation:



This means that the selected conversation and any new messages in it will automatically be moved to the Deleted Items folder. (You can recover these conversations by restoring them to your Inbox folder from the Deleted Items folder.)

CLEAN UP COMMANDS

Clicking Home \rightarrow Clean Up will reveal several commands that you can use keep your inbox clear of clutter:



Here is an overview of the commands in this menu.

- The Clean Up Conversation command will evaluate the currently selected conversation and remove redundant messages. This could include, for example, removing conversation messages whose contents are contained within another message.
- The **Clean Up Folder** command is similar, but it is broader; it will evaluate and remove any redundant messages in any conversation that it finds in the currently selected folder.
- Finally, the **Clean Up Folder & Subfolders** command will evaluation and remove redundant messages from every conversation in the current folder and its subfolders.

ACTIVITY 4-1

Managing Messages Using Tags, Flags and Other Commands

Now that your inbox is starting to fill up with messages, you would like to better organize it using some of the features that you learned about in this topic.

Before students begin, please have them follow these steps to open the Lesson 4.pst file in their Exercise Files.

- Click the File menu, click Open & Export, and click Open Outlook Data File.
- Browse to Lesson 4.pst in the Exercise Files folder. Click OK.

1. To begin, open Outlook 2016. Ensure that the Inbox for the Outlook Data File is displayed:

- 🛱 🕤 🔹		Inbax - Outlook Data File - Outlook 🔳 🚽 🗆 🗙
File Home Send / Receive		
New New Email Items - New Delete	Reply Reply Forward The More's All	Charles book To Manager Image: Charles book Second Paragle Image: Charles book ✓ Done V Move Rules Control loss Fold Ø Control loss V Nove Rules Control loss Sore In Steps r Move Nove Fold Address
▲ Favorites	Search Inbox (Ctrl+E) 🔎 Current Folder 👻	😋 Reply 🕼 Reply All 😋 Forward
Inbox 4 Clutter	All Unread By Date * Newest ↓ 4 Last Week	John Smith <abcuidgets@outlook.com> John Swith Wed 9/30 Celebrating Joe's Retirement</abcuidgets@outlook.com>
Sent Items Drafts	John Smith Celebrating Joe's Retirement Wed 9/30 Hey all, Joe is going to be	Hey all,
▷ ismith@acmewidgets.onmicr	4 Last Month	
≠ outlook data file	OneDrive Add shared folders to your On 9/4/2015 Sync shared folders to your	Joe is going to be retiring soon, so I thought we could through a small celebration. Please let me know your availability for next week.
Deleted Items	4 Older	Thanks,
Archive Drafts	John Smith Invitation to OneNote notebo 3/26/2015 Click to open the notebook in	John
Junk E-mail		
Outbox		
RSS Feeds		
Sent Items		
Sync Issues 4		
Search Folders		
🖬 🖩 🕹 😥 ····		
Items: 3 Unread: 1		III - + 100%

2. Click to select the most recent message inside the Inbox folder:



3. Click Home \rightarrow Unread/Read:

層 う File Ho	= Send / Receive	Folder View 🗘 Tell me wha	inbo: t you want to do	a - Outlook Data File - Outlook		201	
New New Email Items *	ি lgnore ≧ Clean Up + ♣ Junk + Delete	Reply Reply Forward More -	Move to: ? To Manager Team Email Jone Reply & Delete Create New	Wove Rules OneNote	Unread/ Categorize Follow Read	Search People	Store

4. The selected message will now have been marked as unread. With the message still selected, click Home → Categorize → Green Category:

File Home Send / Receive	Folder View 🗘 Tell me what	you want to do	Inbox - C	utlook Data File - Outlook		
New New Email Items*	Reply Reply Forward More*	Move to: ? Team Email Reply & Delete	G To Manager ✓ Done 梦 Create New	Move Rules OneNote	Unread/ Read	Categorize Follow Up + Filte
New Delete	Respond	Quie	ck Steps	Fa Move		Clear All Categories
▲ Favorites	Search Inbox (Ctrl+E)	Current Folder 👻	Reply Reply Rep	ly All 🔒 Forward		Blue category
Inbox 4	All Unread By Date	* Newest 4	John	Smith <abcwidgets@outloc< td=""><td>k.com></td><td>Red category</td></abcwidgets@outloc<>	k.com>	Red category
Clutter	▲ Last Week		Celel	brating Joe's Retirement		Green category
Sent Items	John Smith			5		Orange category
Drafts	Celebrating Joe's Retirement	Wed 9/30				Purple category
	Hey all, Joe is going to be		Hey all,			Yellow category
▷ jsmith@acmewidgets.onmicr	✓ Last Month		loo is going to	he retiring seen so I thoug	ht wo co	All Categories
	OneDrive	9/4/2015	week.	be rearing soon, so raioag	int we co	Set Quick Click

5. As this is your first time using the green category, the Rename Category dialog box will be displayed. Type "Office Bulletin" into the Name text box and then click the Yes button:

Renam	e Category	×
This is th rename	ne first time you have used "(it?	Green category." Do you want to
Name:	Office Bulletin	
Color:	Shortcut Key:	(None) 🗸
		Yes No

6. The green category will now have been applied to the currently selected message. You will see this category adjacent to the message's listing in the Content pane, as well as near the top of the message itself:

B 5 ·		Inbox - Outlook Data File - Outlook	
File Home Send / Receive			
New New Email Items + New Delete	Reply Reply Forward I More * All Respond Quice	Contanager Create New Streps Create New Create New	Search People Address Book Third Final Address Store Find Add-Ins
∡ Favorites [≮]	Search Inbox (Ctrl+E) 🔎 Current Folder 👻	Q. Reply IQ Reply All Q. Forward	
Inbox 4	All Unread By Date * Newest +	John Smith <abcwidgets@outlook.com></abcwidgets@outlook.com>	th Wed 9/30
Clutter	▲ Last Week	Celebrating Joe's Retirement	
Sent Items Drafts	John Smith Celebrating Joe's Retirement Hey all, Joe is going to be	Office Bulletin	•
ismith@acmewidgets.onmicr	✓ Last Month	Hey all,	
✓ outlook data file	OneDrive Add shared folders to your On 9/4/2015 Sync shared folders to your	Joe is going to be retiring soon, so I thought we could throw a week.	small celebration. Please let me know your availability for next
Deleted Items	▲ Older	Thanks	
Drafts Inbox 2	John Smith Invitation to OneNote notebo 3/26/2015 Click to open the notebook in	John	
Junk E-mail			

7. With the message still selected, click Home \rightarrow Follow-Up \rightarrow Tomorrow:

🗄 5				Inbox - O	utlook Dat	a File - Outlook		
File Ho	me Send / Receive	Folder View Q Tell me wha	t you want to do					Mana and A
New New Email Items *	ignore ignore ignore Clean Up ∗ Delete Delete	Reply Reply Forward More -	Move to: ? Team Email Reply & Delete	← To Manager ✓ Done ⅔ Create New	∧ ▼ ▼	Nove Rules OneNote	Unread/ Categorize Read *	Follow Up + Filter Email
New	Delete	Respond	Quic	k Steps	5	Move	Tags	▶ <u>T</u> oday
								 Add <u>Beminder</u> ✓ <u>Mark Complete</u> Clgar Flag

8. With the selected message now marked for follow-up, you will see the small follow-up icon appear next to it in the message list. If you examine the top of the message, you will see when to follow-up on this message:

John Smith <abcwidgets@outlook.com> John Smith Wed 9/</abcwidgets@outlook.com>	
	30
Celebrating Joe's Retirement	
Office Bulletin	
Follow up. Start by Friday, October 9, 2015. Due by Friday, October 9, 2015.	~

(A task for follow-up will also appear within the To-Do Bar.)

9. Close Microsoft Outlook 2016.

TOPIC B: Organize Messages Using Folders

While categories and tags can help you keep track and organize messages within your mailbox, folders are a much better long-term solution. Over the course of this topic you will learn about folders in your mailbox and how to use them to organize Outlook items.

Topic Objectives

In this topic, you will learn:

- About the default e-mail folders
- About e-mail folders on the server
- About personal folders

DEFAULT E-MAIL FOLDERS

Every mailbox in Outlook 2016 contains several default folders that are used to organize and store messages:

jsmith@acmewidgets.onmicr...
 Inbox 4
 Drafts
 Sent Items
 Deleted Items 12
 Clutter
 Conversation History
 Junk Email
 Outbox
 RSS Feeds
 Search Folders

Let's look at each mail folder.

Inbox	This is where new mail is received.
Drafts	Unsent messages are saved here by default.
Sent Items	After a message is sent, a copy of it is stored here.
Deleted Items	This folder acts like the Recycle Bin in Windows. When you delete an Outlook item, it goes here first. To permanently remove the items in your

	Deleted Items folder, click Folder \rightarrow Empty Folder while in the Deleted Items folder.
Clutter	Office 365 users have access to the Clutter folder. This is where low priority messages are automatically moved based on your previous reading behavior.
Conversation History	This folder will list conversation history for any contacts that you have interacted with using Microsoft Lync or Skype for Business.
Junk E-mail	E-mail marked as junk will be stored here.
Outbox	Messages you have created are stored here while Outlook connects to the server and sends the message.
RSS Feeds	Live feeds are stored here.
Search Folders	You can customize these folders to update based on search criteria.
Groups	Access shared workspaces. Only available with Office 365 accounts.

E-MAIL FOLDERS ON THE SERVER

While the default e-mail folders cover storage needs for most situations, you also have the flexibility to create your own folders. Just like the default folders, you can use custom folders to store and save e-mails in a meaningful way. For example, if you are working on a large project that generates a lot of e-mail, you could create a folder just for that project.

Depending on the type of e-mail service that you are using, any folders that you create may also be created on the server that you have connected to. In the case of Microsoft Exchange Server, you need to keep in mind that folders and their contents count against any allocated space for your mailbox. This amount of space is set by your system administrator.

To create a new e-mail folder within your mailbox, click Folder \rightarrow New Folder:

w in AutoArchive Settings Per	Folder Folder ermissions Properties
ho avc	how in AutoArchive avorites Settings Pe avorites Pri

This action will display the Create New Folder dialog box. Using the controls in this dialog box, enter a name, choose the type of Outlook items that the new folder will contain, and select the location where you want the new folder to be placed. Click OK to create the folder:

Create New Folder	×
Name:	
New Folder	
Folder contains:	
Mail and Post Items	\sim
Select where to place the folder:	
✓ Sigmith@acmewidgets.onmicrosoft.com	~
🚽 Inbox (4)	
🞼 Drafts	
💼 Sent Items	
Deleted Items (12)	
Calendar Calendar	
Clutter 🗾 🗾	
> 💵 Contacts	
Conversation History	
🐻 Journal	
Junk Email	¥
OK Cance	I

PERSONAL FOLDERS

Personal folders behave in the same manner as regular folder, but they are intended to store Outlook items offline. They do this by saving the folders and their contents on your local computer and not to the server that you are connected to.

Personal folders are added as an Outlook Data File (.pst) and as such are managed in the Data Files tab of the Account Settings window. You can open this window by clicking File \rightarrow Info \rightarrow Account Settings \rightarrow Account Settings:



In the Account Settings window, click Add to get started:

Account Settings						×
Data Files Outlook Data	a Files					
E-mail Data Files	RSS Feeds	SharePoint Lists	Internet Calendars	Published Calendars	Address Books	
🛃 Add 督 Se	ttings 📀	Set as Default 💙	🕻 Remove 🛅 Open	File Location		
Name	Lo	ation				
🤪 jsmith@acmev	widget C:∖	Users\abcwi\AppD	ata\Local\Microsoft\C	outlook\jsmith@acmew	idgets.onmi	
Select a data file in display the folder t down Outlook.	the list, ther hat contains	i click Settings for i the data file. To me	more details or click C ove or copy these files	Open File Location to 5, you must first shut	Tell Me More	
					Close	

This will display the Create or Open Outlook Data File dialog box, open to the Outlook Files folder in the My Documents folder that is associated with your Windows user account. Using the controls in this dialog you can choose another location where you want the Outlook data file to be stored (if desired), as well as give it a custom name:

2 Create or Open Outlook Data File X									
	~ Ö	Search Outlook F	iles 🔎)					
Organize 🔻 New fo			III ▼ (3					
🔮 Documents 🖈	^ Name	^	Date modified	Туре	Size				
📰 Pictures 🛛 🖈			No items mat	ch your search.					
Microsoft Outlool									
a OneDrive									
💻 This PC									
Desktop									
Documents									
Downloads Music									
E Pictures									
📕 Videos									
🏪 Local Disk (C:)	~								
File name: M	/ Outlook Data File(1)							~	
Save as type: Ou	tlook Data File							\sim	
	Add Optional								
	assword								
Hide Folders					Tools 🔻	ОК	Cancel		

Once you click the OK button in the Create or Open Outlook Data File dialog box, you will be returned to the Account Settings dialog box. The new data file (which includes personal folders) will be listed under the Data Files tab:

Account	t Settings					
Data C	Files Jutlook Data	Files				
E-mail	Data Files	RSS Feeds	SharePoint Lists	Internet Calendars	Published Calendars	Address Books
Name Select a display	a data file in f	the list, then hat contains t	ation Jsers\abcwi\AppD Jsers\abcwi\OneD click Settings for it the data file. To mo	ata\Local\Microsoft\C rive\Documents\OutI more details or click C pve or copy these file:	Dutlook\jsmith@acmew ook Files\Example.pst Dpen File Location to 5, you must first shut	ridgets.onmi Tell Me More
down	Uutiook.					

Back in the Outlook 2016 window, you will see the new data file listed in the Navigation pane. Expanding this item will reveal any personal folders that it contains:

 jsmith@acmewidgets.onmicr
Inbox 4
Drafts
Sent Items
Deleted Items 12
Clutter
Conversation History
Junk Email
Outbox
RSS Feeds
▷ Search Folders
▷ Groups
▲ example
Deleted Items
Search Folders

By default, new data files will include a Deleted Items folder and a Search Folders link, but you can add as many personal folders as you want by following the same steps as you would to add a regular folder to your mailbox.

ACTIVITY 4-2

Organizing Messages Using Folders

You have been put in charge of hiring a new employee. Prospective candidates will e-mail you their resumes, so you want to create some folders in your mailbox to keep everything organized.

1. To begin, open Outlook 2016 to your Inbox:

醫 今 ÷	Folder New 0 Tell member you want to do	Inbox - jimshi@etmenidgets.com/crosoft.com - Outlook
New New Email Rems - New Delete	Reply Reply Forward More - All Repond	Contransport Control Network Con
Favorites Inbox 4 Clutter	Search Current Mailbox () Current Mailbox - All Unread By Date * Newest 4 4 Tomorrow	Call Really Call Really All Call Forward John Smith < Really All Call Forward John Smith < Really All Call Forward John Smith < Really Call Call Call Call Call Call Call
Sent Items Drafts	John Smith Joe's Retirement Fri 10/2/2015 1:37 PM Hey all, Joe is going to be	V Conductance V
✓ jsmith@acmewidgets.onmicr Inbox 4 Drafts	Last Week msftconn@microsoft Program Closing - Office 20 Mon 9/21	Action tens
Sent Items Deleted Items 3	✓ Older OneNote Team	Joe is going to be retiring soon, so I thought we could throw a small celebration. Please let me know your availability for next week.
Conversation History	Welcome to OneNote 7/31/2015 Get OneNote for free on all	Thanks,
Outbox RSS Feeds > Search Folders	There are more items in this folder on the server Click here to view more on Microsoft Exchange	
> Groups		
S		
Items: 9 Unread: 4		Updating this folder. Connected to: Microsoft Exchange 🔲 🕮 = — 🕂 + 100%

2. To create a new folder, click Folder \rightarrow New Folder:



3. The Create New Folder dialog box will now be displayed. In the Name text box, type "Candidates:"

Create New Folder	Х
Name:	
Candidates	
Folder contains:	
Mail and Post Items	\sim
Select where to place the folder:	
 ismith@acmewidgets.onmicrosoft.com Inbox (4) Drafts Sent Items Deleted Items (12) Calendar Clutter Contacts 	^
Conversation History	
Junk Email	~
OK Cancel	I

4. As this new folder is going to be used to store messages, you do not need to modify the "Folder contains" drop-down menu; however, you do need to choose where the folder will be placed. For this example, select the top-level item in the provided list:

Create New Folder	\times
Name:	
Candidates	
Folder contains:	
Mail and Post Items	\sim
Select where to place the folder:	
🗸 🗸 jsmith@acmewidgets.onmicrosoft.com	^
🚽 Inbox (4) 😼	
📝 Drafts	
📑 Sent Items	
Deleted Items (12)	
Calendar	
Clutter	
> 💵 Contacts	
Conversation History	
🐻 Journal	
🔣 Junk Email	×
OK Cancel	

5. Click OK to create a new folder using the selected settings:

Create New Folder	×
Name:	
Candidates	
Folder contains:	
Mail and Post Items	\sim
Select where to place the folder:	
✓ ∑ jsmith@acmewidgets.onmicrosoft.com	~
🥣 Inbox (4)	
📝 Drafts	
💼 Sent Items	
Deleted Items (12)	
Calendar	
Clutter	
> 💵 Contacts	
Conversation History	
🐻 Journal	
🗖 Junk Email	×
OK Cancel	1

6. The new folder will now appear in the Navigation pane:

▲ Favorites
Inbox 4
Clutter
Sent Items
Drafts
▲ jsmith@acmewidgets.onmicr
Inbox 4
Drafts
Sent Items
Deleted Items 12
Candidates 🔫
Clutter

7. Now you need to create a subfolder within the Candidates folder for candidates that you would like to screen over the phone. Click Folder \rightarrow New Folder:

8						Inbox	- jsmith@a	cmewidgets.c	nmicrosoft.co	m - Outlook	
File	Home	Send / Receive	Folder	View 🖓	Tell me what yo	ou want to do					
New Folder	New Search Folder New	Rename Folder Actions	older M Folder as	lark All Run Rul s Read Now	AJ es Show All Folders A to Z Clean U	ie Clean Up Folder * ie Cleate All 한 한 Recover Deleted Items	Show in Favorites Favorites	View on Server Online View	AutoArchive Settings	Folder Permissions Properties	Folder Properties

8. The Create New Folder dialog box will now be displayed. Type "Phone Screen" into the Name text box:

Create New Folder	×
Name:	
Phone Screen	
Folder contains:	
Mail and Post Items	\sim
Select where to place the folder:	
 jsmith@acmewidgets.onmicrosoft.com Inbox (4) Drafts Sent Items Deleted Items (12) Calendar Candidates Clutter E Contacts Conversation History Journal 	<
OK Cance	I

9. From the "Select where to place the folder" list box, click to select the Candidates folder that you created previously. Click OK:

Create New Folder	\times
Name:	
Phone Screen	
Folder contains:	
Mail and Post Items	\sim
Select where to place the folder:	
 jsmith@acmewidgets.onmicrosoft.com Inbox (4) Drafts Sent Items Deleted Items (12) Calendar Candidates Clutter Sent Contacts 	^
Sources ation History	~
OK Cancel	

10. The new subfolder will appear under the Candidates folder:

▲ jsmith@acmewidgets.onmicr
Inbox 4
Drafts
Sent Items
Deleted Items 12
▲ Candidates
Phone Screen 🔫
Clutter

11. Close Microsoft Outlook 2016.

Summary

During this lesson, you learned about some of the different tools and features that are available to you to help you organize Outlook items within your mailbox. You should now feel comfortable managing your mailbox using a combination of categories and follow-up flags. Additionally, you should now be familiar with the folders that are included with your mailbox by default, as well as how to create new folders.

Lesson 5: Managing Your Calendar

Lesson Objectives

In this lesson you will learn how to:

- View the calendar
- Manage appointments
- Manage meetings
- Print your calendar

TOPIC A: View the Calendar

The Calendar workspace provides you with a complete calendar as well as scheduling tools to help you schedule and view upcoming appointments and events. Over the course of this lesson, you will learn about the calendar in Outlook and the various ways that you can view it.

Topic Objectives

In this topic, you will learn:

- About the types of calendar entries
- About calendar grid arrangement options
- How to use the Weather Bar and the Daily Task List
- How to modify calendar layout options
- How overlay calendars with Schedule View
- How to delete calendars

TYPES OF CALENDAR ENTRIES

There are three primary types of entries that can be added to the calendar in Outlook: appointments, meetings, and all-day events.

- Appointments are intended to be used when you have an obligation that occurs during a specific time frame.
- Meetings are like appointments; however, they also include expanded features like attendance management options.
- Finally, **all-day events** are obligations that span days rather than hours. For example, a conference would typically be considered an event.

No matter which type of entry you add to a calendar, you have the option to schedule them as **recurring**. This means that you can have an activity appear on a regular basis going forward so that you do not having to manually enter them in each time. This feature is great for regular weekly meetings or other frequent obligations that you are required to attend.

Recurring events are identified in the calendar by the following symbol:

Weekly Staff Meeting; B 😷

CALENDAR GRID ARRANGEMENT OPTIONS

You can change the view that is used to display the calendar grid to one of the five options in the Arrange group of the Home tab:

r.	5 ∓									G	alendar - jsr	nith@acme	widgets.on	microsof	t.com - Oi	rtlook	
File	Home	Send /	Receive Fo	lder View	Q	Tell m	ne wha	t you w	ant to d								
			E	• •							1.		.				Search People
New	New	New	New Skype	Today Next 7	1	Day \	Work	Week	Month	Schedule	Open	Calendar	E-mail	Share	Publish	Calendar	Address Book
Appointme	ent Meeting	ltems *	Meeting	Days		V	Week			View	Calendar	Groups *	Calendar	Calendar	Online *	Permissions	
	New		Skype Meeting	Go To	. L			Arrange		L.	Manage	Calendars		S	hare		Find

Notice that the current view is highlighted. Here is a breakdown of each option:

• **Day**: View one day at a time.

- Work Week: View a typical work week (Monday to Friday).
- Week: View an entire seven-day week.
- Month: View a month at a time.
- Schedule View: View a detailed schedule of the current date and time, compared against other calendars.

Time Scale Options

When viewing the calendar using every view except the Month view, you will see that each time slot is divided into two 30 minute halves:



You can modify this aspect of your calendar by clicking View \rightarrow Time Scale \rightarrow [Time Scale]:



There are several different time scales that you can select from, with varying degrees of detail. Typically the 30 Minutes option will meet the needs of most people; however, those with busier schedules may want to consider one of the shorter options.

THE WEATHER BAR

The Weather Bar appears above your calendar, just below the ribbon. This bar displays the weather conditions for the selected location for today, tomorrow, and the following day:



To view more detailed information about the weather reports, move your cursor over any of the two days on the bar. A pop-up will then display precipitation information and forecast details:

	5	÷						Ca	lendar - jsmith@acm	newidg	ets.onmicrosc	oft.com - 0	Dutlook		
File	н	ome	Send / I	leceive	Folder View	Q Tell me what you wa	int to do.								
Change View •	View Setting	Rese Is View	: Day	Work Week	Week Month Sched	Ule Working Hours	Color	Daily Tas	k Folder Reading T Pane - Pane -	Го-Do Bar ▼	People Pane *	eminde Windov	ers Open in New w Window	Close All Items	
Cu	rrent V	iew			Arrangement	5	Color		Layout		People Pane		Window		
€U	O MO T	ctober 2 TU WE	015 TH FR 1	► <	 Octo 	ber 20 1 5			w	ashing	ton, D.C)	Tomorrow 7 F / 56° F	Thurs 74° F	sday / 62° F
27	28	29 30	1 2	з	SUNDAY	MONDAY					× 1	Mosth	Clear		
4 11 18	5 12 19	6 7 13 14 20 21	8 9 15 16 22 23	10 17 24	Sep 27	28			29	ht	tp://www.fore	Precipitat	ion: 0%	more online	2
25	26	27 28	29 30	31											

By default, the location is typically set to New York, NY or another major city. To change it, click on the city and click Add Location:

P	5	Ŧ						Calendar - jsmith@acn	newidgets.onmicroso	ft.com - Outlook	
File	Hom	ie S	Send / Re	eive	Folder View	v 🛛 🖓 Tell me what you wa	nt to do.				
4	\$	5			***	Time Scale *	€			💄 📑	
Change View *	View Settings	Reset View	Day	Work Week	Week Month Sc	View Working Hours	Color *	Daily Task Folder Reading List * Pane * Pane *	To-Do People Bar * Pane *	Reminders Open in New Window Window	Close All Items
Cu	irrent Viev	v			Arrangeme	nt G	Color	Layout	People Pane	Window	
∢ SU	Octo MO TU	ber 201 WE TH	5 ► F FR SA	<	♦ Oc	tober 2015		M A	Vashington, D.C	Tomorrow 75° F/ 56° F	Thursday 74° F / 62° F
27	28 29	30 1	123		SUNDAY	MONDAY		TUESDAY	พย์มีพ	ESDAY	THURSDAY

This action will display a search field in which you can enter the city where you reside.

Type your city's name and press Enter or click the small magnifying glass. After a moment, a list of results will be displayed in a small drop-down menu. Click the best matching result:

Ē	ా		÷										Ca	endar - js	mith@a	cmewidg	ets.onmicrosol	t.com - Oı	ıtlook		
File	H	lom	2	Send	/ Rec	eive	Folder		View	♀ Tell i	me what you w	ant to do.									
Change View *	Viev Settin	ŀ / gs /iew/	Reset View	D	ay	Work Week	Week	Mont	h Schedu View	le 🗟 W	ime Scale * Iverlay Vorking Hours	Color Color	Daily Tas List -	k Folder Pane *	Reading Pane *	To-Do Bar *	People Pane * People Pane	Reminder: Window	Open in Nev Window Window	Close All Items	
€U	MO	Octol TU	ber 20 WE T	15 H FR	► SA	<	4	• (Octob	er 20)15				Bos	iton	۵ne مر		Tomorrow 75° F/ 56° F)	l hursday 74° F / 62° F
27	28	29	30	1 2	3		SUN	DAY			MONDAY				W Bos	ston, MA	. one.	DAY		THURSDA	Y
4 11 18	5 12 19	6 13 20	7 14 1 21 2	8 9 5 16 2 23	10 17 24		Sep	27			28			29	Bo: Bo: Bo:	ston, Unit ston, NY ston, TX	ed Jingdom			Oct 1	
25	26	27	28 2	9 30	31																

After a moment, the new weather reports will appear:

e	\$		÷							Cal	endar - jsmi	ith@ac	mewidget	s.onmicrosc	oft.com - C	utlook		
File		lome	s	end / Re	ceive	Folder	View	Tell me what you w	ant to do.									
Change View *	Viev Settin	v R gs V view	c eset ïew	Day	Work Week	Week Mo	ngement	Time Scale • Overlay	Color Color	Daily Tas List +	Folder Re Pane * P Layout	eading Pane *	To-Do Bar *	People Pane * People Pane	Reminde Window	rs Open in New Window Window	Close All Item	5
€U	и мо	Dctob TU V	er 2015 /E TH	5) FR SA	<	4 Þ	Octobe	er 2015				Bos	ston, Mas	sachusetts	. ر	Tomorrow 70° F/ 52° F		hursday 51° F / 54° F
27	7 28	29	30 1	2 3		SUNDAY	Y	MONDAY			TUESDAY			WEDN	ESDAY		THURSD.	ΔY
4 11 18 25	4 5 1 12 3 19 5 26	6 13 20 27	7 8 14 15 21 22 28 29	9 10 16 17 23 24 30 31		Sep 27		28			29			30			Oct 1	

THE DAILY TASK LIST

When the Daily Task List is displayed, it appears at the bottom of your calendar. This workspace will display any tasks that occur during the current time frame. While the name of the task will always be displayed, the details of the task (start date, due date, etc.) will only be displayed while using the Day calendar grid arrangement.

To toggle the Daily Task List on or off, click View \rightarrow Daily Task List \rightarrow [View Option]:

	5	÷											Cale	ndar - j	smit
File	Hon	ne	Send / Re	ceive	Folde	r Vi	ew	٦	Fell me what yo	u wa	nt to do				
4	¢.	5							Time Scale -						
Change View •	View Settings	Reset View	Day	Work Week	Week	Month	Schedu View	ile 🗄	🗄 Overlay 🗟 Working Hou	rs	Color •	Daily Lis	Task st ▼	Folder Pane s	r Rei Pa
Cu	rrent Vie	N				Arrangen	nent			ы	Color		Norr	nal	
													<u>M</u> ini	mized	w
												~	<u>O</u> ff		
													<u>A</u> rra	nge By	►

CALENDAR LAYOUT OPTIONS

Like many aspects of Outlook 2016, the Calendar layout is very flexible. You can choose which components you would like to display, hide, or minimize. To modify what components are displayed and how, use the Daily Task List, Folder Pane, Reading Pane, and To-Do Bar drop-down commands within the Layout group of the View tab while in the Calendar workspace:



By default, the Navigation pane and Daily Task List are displayed. The Reading pane and To-Do Bar are both hidden from view.

Showing and Hiding Calendars

If you are working with multiple calendars, you can show or hide them by toggling their associated checkboxes in the My Calendars section of the Navigation pane:

						_						
		N	ove	mbe	r 201	5						
	SU	мо	TU	WE	TH	FR	SA					
	1	2	3	4	5	6	7					
	8	9	10	11	12	13	14					
	15	16	17	18	19	20	21					
	22	23	24	25	26	27	28					
	29	30	1	2	3	4	5					
	6	7	8	9	10	11	12					
4] M: ☑	y Ca Cale	len enda	dar: ir	s							
Work Calendar												
	Ot	her	Cal	enc	lars							

Alternatively, you can also right-click the tab for the calendar that you would like to hide and click Hide This Calendar:

October 6, 2015



OVERLAYING CALENDARS WITH SCHEDULE VIEW

If you use multiple calendars, you may frequently find yourself trying to schedule appointments in one without causing conflicts with the other. **Schedule View** exists so that you can compare your calendars against each other easily and schedule appointments so that no conflicts occur.

To use the Schedule View, click View \rightarrow Schedule View:



When applied, the Schedule View will stack any displayed calendars in the same view. This way you can easily identify any conflicts between the displayed calendars. You can also schedule appointments as you would in any other calendar view:

副 ち マ File Home Send/Receive	Folder View 9 Tell me what you was	Calendar - jsmith@acmewidgets.onmicrosoft.com	- Outlook	■ - □ ×
Change View Reset View Settings View Current View 4. October 2015	Week Month Schedule View Arrangement 5:	Image: Second	ders Open in New Close low Window All Items Window Thursday	^
SU MO TU WE TH FR SA	 October 4 - 10, 2015 	Boston, Massachusetts *	70° F/ 52° F 61° F/ 54° F Search C	lendar (Ctrl+E)
27 28 29 30 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24	4 pm	8 am 9 10 Tuesday, October 6, 2015	11 12 pm 1	2 3 4
25 26 27 28 29 30 31	Calendar	Dentist Appointment		
November 2015 SU MO TU WE TH RF SA 1 2 3 4 5 6 6 9 10 11 12 13 14 15 15 17 18 19 20 21 22 24 25 26 27 28 20 1 12 14 5 6 7 8 9 10 11 12 22 24 25 26 27 28 20 1 2 3 4 5 6 7 8 9 10 11 12 24 24 3 4 5 6 7 8 9 10 11 12				
Celendar Work Calendar Other Calendars	Work Calendar	Weekly Boundup Meeting Boundroom 101A		
S S S S				
Items: 1	•		All folders are up to date. Connected to: Microsoft	Exchange 🔲 🛛 – 📕 + 100%

DELETING CALENDARS

You can delete any calendar (other than the default) from your mailbox by right clicking its listing in the My Calendars section of the Navigation pane and clicking Delete Calendar:



A dialog box will appear in which you need to confirm this action. Click Yes:



The calendar in question will then be moved to the Deleted Items folder.

ACTIVITY 5-1 Customizing Your Calendar View

As you are become more familiar with the Calendar workspace in Outlook 2016, you would like to examine some of the different ways that you can customize it.

1. To begin, open Outlook 2016:

S =		Inbox - junih@x:mexidgets.enmicrosoft.com - Outlook
New New Email Items* Delete	Reply Reply Forward More - All Reply Reply Reply Forward More - All All	
✓ Favorites	Search Current Mailbox (🔎 Current Mailbox 🔹	Reply Reply All Provard
Inbox 4 Clutter Sent Items Drafts	All Unread By Date * Newest 4 * Tomorrow John Smith Boe's Retirement Fri 10/2/2015 1:37 PM Heyall, Joe's gening to be	John Smith <abcuidges@outlook.com> Jake seals § 1 1222015 Joés Seitrement ✓ Soleskulsdoor 1138</abcuidges@outlook.com>
 ismith@acmewidgets.onmicr 	4 Last Week	Action Items
Inbox 4 Drafts	msftconn@microsoft Program Closing - Office 20 Mon 9/21	Hey all,
Sent Items Deleted Items 3	4 Older	Joe is going to be retiring soon, so I thought we could throw a small celebration. Please let me know your availability for next week.
Clutter Conversation History	OneNote Team Welcome to OneNote 7/31/2015 Get OneNote for free on all	Thanks,
Junk Email Outbox	There are more items in this folder on the server	John
RSS Feeds	Click here to view more on Microsoft exchange	
Search Folders		
} Groups		
۰۰۰ 🖸 دو 🔟 🗠		

2. Display the Calendar workspace by clicking the Calendar button in the Navigation pane:

		22	Ì	
Items:	13 Un	read: 4		

3. The Calendar workspace will now be displayed. Examine the Arrange group on the Home tab to ensure that the Day option has been selected. If it has not, select it now:

信 5 ÷								
File Home Send / Receive								
New	ype Today Next 7 ng Days reting Go To rs	Day Work Week Month Schedule Week Arrange 5	Open Calendar Calendar - Groups - Manage Calendars	Share Publish Calendar r Calendar Online * Permissions Share	Search People			~
 ♦ October 2015 ♦ 	 ♦ Octob 	ber 6. 2015	Boston, Massac	husetts -) Tomorrow	> Thursday	Search Calendar (Ctrl+E)		P
SU MO TU WE TH FR SA				10 1/32	r 01 r/34 r			
27 28 29 30 1 2 3	TUESDAY	1						
11 12 13 14 15 16 17	6							
18 19 20 21 22 23 24								
25 26 27 28 29 30 31	8***							^
November 2015	9							
SU MO TU WE TH FR SA								
1 2 3 4 5 6 7	10							
8 9 10 11 12 13 14								
15 16 17 18 19 20 21	11							
22 23 24 25 26 27 28								
29 30 1 2 3 4 5 6 7 5 9 10 11 12	12"							
A My Calendars	1 5							-
Calandar								tre
Carcinola	2 oddy							u iou
Other Calendars	2 2							1
	- Bee							2
	4							
	5							
	6							
	1							
	D							
🔤 📰 🎎 🖾 ····								-
Items: 0				All folders are	up to date. Connected	to: Microsoft Exchange	00	+ 100%

(If this option is selected, skip to the next step.)

4. Now click Home \rightarrow Work Week to view that option:



5. With the Work Week option applied, you will see that the weekend dates are hidden and the current date will be selected:

File Home Send / Receive					
New New New New Appointment Meeting Items * New Skype I	Skype Today Next 7 Day Work Week Mc Days detring Go To ta Arrange	nth Schedule View rs Manage Calendars	I Share Publish Calendar ar Calendar Online ~ Permissions Share	h People ddress Book Find	
October 2015	 October 5 - 9, 2015 	Boston, Massa	chusetts -) Tomorrow	Thursday 61°E/Sd°E Search Calendar (Ctri-	φ (t
SU MO TU WE TH FR SA	MONIDAY	TUTTINAN	HEDDERDAY	111000 AV	PRIDAV
2/ 28 29 30 1 2 3	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
11 12 13 14 15 16 17	5	6	7	8	9
18 19 20 21 22 23 24					
25 26 27 28 29 30 31	8				
November 2015	9				
SU MO TU WE TH FR SA					
1 2 3 4 5 6 7	10				
8 9 10 11 12 13 14					
15 16 17 18 19 20 21	11				
22 23 24 25 26 27 26					
6 7 8 9 10 11 12	12 ^{PM}				
	1 14				
▲ My Calendars	5				i
Calendar	2 10				ointm
	t vt				App
Other Calendars	3 1				(eet
	ž				
	4				
	5				
	6				
	7				
200 m at 151					
Ball 1111 6/10 [V] ****	8				

6. Click Home \rightarrow Week:

5	ب ج									Ca	alendar - jsr	nith@acme	widgets.on	microsof	t.com - Oi	ıtlook	
File	Home	Send /	Receive Fol	der	View	🛛 Tell	♀ Tell me what you want to do										
			<u>e</u>	1			:				100	1011					Search People
		2		<u></u>									1	÷	ш О	~ >>	Address Book
New	New	New	New Skype	Today	Next 7	Dav	Work	Week	Month	Schedule	Open	Calendar	E-mail	Share	Publish	Calendar	CONTRACTOR OVER
Appointm	ent Meeting	Items -	Meeting		Days		Week	N		View	Calendar	Groups *	Calendar	Calendar	Online *	Permissions	
	New		Skype Meeting	Go T	io is			Arrange	3	5	Manage	Calendars		S	hare		Find

7. With the Week option applied, the calendar will include the entire seven-day week. Weekends are separated from the work week with shading:

語 5 ¥ File Home Send/Receive	Folder View ♀ Tell me wha	Calendar - js t vou want to do	smith@acmewidgets.onmicr	osoft.com - Outlook			• - • ×
New New New New Appointment Meeting Items * Meeting Items *	pe Today Nest 7 Day Work g Days rting Go To Ts	Week Month Schedule View range ra	Calendar r Groups calendar Cale	re Publish Calendar ndar Online * Permissions Share	earch People Address Book Find		~
October 2015 F	 October 4 - 10, 	2015	Boston, Massachuset	ts - J Tomorrow 70°F/52°F	Thursday 61°F/54°F Search	Calendar (Ctrl+E)	٩
27 28 29 30 1 2 3	SUNDAY	MONDAY	UESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
4 5 6 7 8 9 10 11 12 13 14 15 16 17	4	5 6		7	8	9	10
18 19 20 21 22 23 24							
25 26 27 28 29 30 31	8						A
November 2015	9						
SU MO TU WE TH FR SA							
1 2 3 4 5 6 7	10						
8 9 10 11 12 13 14							
15 16 17 18 19 20 21	11						
22 23 24 25 26 27 28							
29 30 1 2 3 4 5 6 7 8 9 10 11 12	12 ^{PM}						
▲ My Calendars	1 198						ert
Calendar	2 <mark>u sdd</mark>						bointe
Other Calendars	3 444						Next A
	4						
	5						
	6						
	7						
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items: 0				All folders are up to	date. Connected to: Micros	oft Exchange 🔲 💷	+ 100%

8. Click Home \rightarrow Month:

탑 File	్ ₹ Home	Send /	Receive Fo	lder View	♀ Tell me	what you w	vant to do	Calendar - j:	:mith@acme	widgets.or	imicrosof	t.com - Oi	utlook	
			E	····				100					3	Search People
New	New	New	New Skype	Today Next 7	Day W	ork Week	Month Schedul	e Open	Calendar	E-mail	Share	Publish	Calendar	
Appointme	ent Meeting	ltems -	Meeting	Days	W	eek	View	Calendar	• Groups •	Calendar	Calendar	Online -	Permissions	
	New		Skype Meeting	Go To 🖙		Arrange	45	Manage	Calendars		5	hare		Find

9. With the Month option applied, you will see that you have a much broader picture of your calendar:

話 ち ・		Ca	lendar - jsmith@acmewidgets.or	microsoft.com - Outlook			a – b	×
File Home Send / Receive	Folder View 🖓 Tell m	e what you want to do						
New New New New Skype Meeting Items *	pe Today Next 7 Day V g Days V ting Go To 15	Vork Week Month Schedule View	Open Galendar Calendar Groups - Manage Calendars	Share Publish Calendar Calendar Online * Permissions Share	Search People			~
October 2015 K	 October 201 	5	Boston, Massacl	usetts - J Tomorrow	Thursday	rch Calendar (Ctrl+E)		ρ
SU MO TU WE TH FR SA 27 28 29 30 1 2 3	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	
4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	Sep 27	28	29	30	Oct 1	2	3	
November 2015								
SU MO TU WE TH FR SA 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 1 2 3 4 5	4	5	6	7	8	9	10	
6 7 8 9 10 11 12	pps intraent	12	13	14	15	16	17	The formation of the second se
Calendar Other Calendars	Previous A						March 4000	in the second se
	18	19	20	21	22	23	24	
	25	26	27	28	29	30	31	
i iii 25 ⊡ ···								
Items: 0				All folders are	up to date. Connected to: Mic	rosoft Exchange 🔲 💷	+ 100	16

10. Click Home \rightarrow Schedule View:

5	5 =									G	alendar - js	nith@acme	widgets.on	microsof	t.com - Oi	utlook	
File	Home	Send /	Receive Fol	lder	View	♀ Tell	me wha		ant to d								
				107							100						Search People
		2 90			1000								-	\rightarrow	····	~ >>	Address Book
New	New	New	New Skype	Today	Next 7	Day	Work	Week	Month	Schedule	Open	Calendar	E-mail	Share	Publish	Calendar	
Appointme	nt Meeting	Items -	Meeting		Days		Week			View N	Calendar	✓ Groups ✓	Calendar	Calendar	Online -	Permissions	
	New		Skype Meeting	Go 1	To Ta			Arrange		Ę.	Manage	Calendars		s	hare		Find

11. With the Schedule View applied, you will see a very detailed view of the current day and any planned activities. This is the option that you would choose if you wanted to compare one calendar with another:

Bit Home See/ / Ferror Tot me shad you went to do: New	۰ ۹
New New New New Speer Eddy Next Yeak Work Work Work Work Work Work Schedule Open Celerder E-mail Sum PABAh Calendar Source Parameter Speer Scheduler Speer Celerder E-mail Sum PABAh Calendar Source Parameter Speer Scheduler Source Celerder E-mail Sum PABAh Calendar Source Parameter Speer Scheduler Scheduler Source Parameter Speer Scheduler Sch	^ م
October 2015 C Control of the sector of the s	٩
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11 12 14 15 16 17 Tuesday, Ortober 6, 2015	
16 19 20 21 22 23 24	
25 26 27 28 29 30 31 Calendar Calendar	
Mouseher 2015	
1 2 3 4 5 6 7	
8 9 10 11 12 13 14	
15 16 7 18 19 20 21	
22 23 24 25 26 27 28	
29 30 1 2 3 4 5	
6 7 8 9 10 11 12	
/ MV Calendars	
Cilendar	
Other Calendars	
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12. Return to the Week option by clicking Home \rightarrow Week:



13. You would like to see how the Daily Task List will look when minimized. Click View \rightarrow Daily Task List \rightarrow Minimized:



14. You will see that the minimized state of the Daily Task List displays it as a thin bar along the bottom of the calendar:

語 り v File Home Send/Receive	Folder	View Q Tell me w	hat you want to do	Calendar - jsmith@acmewidgets	onmicrosoft.com - Outlook			0 - 0	×
Charge View Reset View * Settings View Current View	Week	Month Schedule View rrangement	g Hours rs Color rs Color rs Color	Task Folder Reading To-Do t* Pane* Pane* Bar* Layout	People Pane * Reminders Open in New Window Window Window	Close All Items			~
October 2015 K		October 4 - 10	, 2015	Boston, Mass	chusetts - J Tomorrow 70°F/52°F	Thursday 61°F/54°F Search	h Calendar (Ctrl+E)		Q
27 28 29 30 1 2 3		SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	
4 5 6 7 8 9 10 11 12 13 14 15 16 17		4	5	6	7	8	9	10	
18 19 20 21 22 23 24	8.444								
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November 2015	9								
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1 2 3 4 5 6 7	10								
8 9 10 11 12 13 14									
22 23 24 25 26 27 28	11								
29 30 1 2 3 4 5	40.84								
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▲ My Calendars	1	intreed							tment
Calendar	2	ne yoba							t Apps in
Other Calendars	3	Previo							Ne
	4								
	5								
	6								
	- 7								
	· '								
	8								
a 🖸 \cdots		Tasks: 1 Active tasks, 0 Com	pleted tasks						~ •
Items: 0					All folders are up	to date. Connected to: Micro	soft Exchange 🔲 💷	+ · ·	100%

15. Return the Daily Task List to its default state by clicking View \rightarrow Daily Task List \rightarrow Off:



16. Close Microsoft Outlook 2016.
TOPIC B: Manage Appointments

Once you have configured the Calendar workspace to your personal preferences, you can begin adding appointments and managing them. Over the course of this topic, you will learn more about appointments in Outlook and how they are managed in the Calendar workspace.

Topic Objectives

In this topic, you will learn:

- About the Appointment form
- How to create recurring events
- About reminders
- About the Show As options
- About the Private option
- How to categorize appointments
- How to set appointment priority
- How to search, print, and forward appointments

THE APPOINTMENT FORM

To add an appointment to your calendar, open the Appointment form by clicking Home \rightarrow New Appointment while in the Calendar workspace:

											alendar - jsr	nith@acme	widgets.on	microsof	t.com - Oı	utlook	
File	Home	Send /	Receive Fol	lder	View	♀ Tell	me wha	at you w	ant to d	lo							
			<u>e</u>	62			-				100						Search People
		<u> </u>											· · ·	÷	ш о	••>	Address Book
New	New	New	New Skype	Today	Next 7	Day	Work	Week	Month	Schedule	Open	Calendar	E-mail	Share	Publish	Calendar	
Appointm	ent Meeting	Items -	Meeting		Days		Week			View	Calendar	Groups *	Calendar	Calendar	Online -	Permissions	
3	New		Skype Meeting	Gol	го гы			Arrange		5	Manage	Calendars		5	hare		Find

(If you are not in the Calendar workspace, click Home \rightarrow New Items \rightarrow Appointment.)

The Appointment form includes a variety of different fields that are used to add the event's details:

₿	5 0	↑ ↓	÷				Untitled - Appointment						E	- 1		×
File Save & I Close	Appointment	- Appointme	nt Scheduling Assistant	Skype Skype Meeting	Meeting Notes	Invite Attendees	Show As: Busy Reminder: 15 minutes Options	, Recurrence	Time Zones	egorize ▼ ↓ La	ivate igh Importance ow Importance	Office Add-ins				~
Subject															_	
Location																*
Start time	Tue 10/6/2015		8:30 AM		All day event											
End time	Tue 10/6/2015		9:00 AM	*												

Here is an overview of the available fields.

- In the **Subject** field, you can enter a quick description of the appointment. This is what you will see when the appointment shows up on the calendar.
- In the **Location** field, you can enter where the appointment will take place.
- The **"Start time"** and **"End time"** menus allow you to choose when the appointment will start and end.
- Additionally, you can check the "All day event" checkbox if the event you are adding spans an entire day.
- Inside the Appointment form body, you can add more details or notes about the appointment.

CREATING RECURRING EVENTS

If your appointment repeats on a regular basis, you can schedule it as a recurring event. To this, click Appointment \rightarrow Recurrence:

H							Untitled - Appo	pintment					
File	Appointment	Insert For	mat Text	Review Q	Tell me what yo	u want to do							
2	X 🖾 Calendar	0		9	N		Show As:	Busy *	\bigcirc			Private	5
Save & Close	Delete 😋 Forward 🔻	Appointment	Scheduling Assistant	Skype Meeting	Meeting Notes	Invite Attendees	🐥 Reminder: 1	5 minutes 🔹	Recurrence	Time Zones	Categorize	 Low Importance 	Office Add-ins
	Actions	Sho	w	Skype Meeting	Meeting Notes	Attendees		Options	63	Gi Gi		Tags	Add-ins

This action will display the Appointment Recurrence dialog box. Using its controls, you can choose the start time, end time, and duration for the recurring appointment. Next, you can choose a recurrence pattern (daily, weekly, monthly, or yearly). Finally, using the controls in the "Range of recurrence" section you can choose how long you want this recurring appointment to continue:

Appointment Recurrence	e	×
Appointment time Start: 8:30 AM End: 9:00 AM Duration: 30 minutes Recurrence pattern O Daily Recur	every 1 week(s) on:	
Weekly Monthly Yearly	Sunday 🗌 Monday Thursday 🔲 Friday	☑ Tuesday
Range of recurrence Start: Tue 10/6/2015	 No end date End after: 10 End by: Tu 	occurrences e 12/8/2015
C	Cancel Rem	iove Recurrence

Click OK to save the recurrence settings. Note that you can remove a recurrence by clicking the Remove Recurrence button in this dialog box.

REMINDERS

When adding a new appointment to your calendar, you have the option to set a reminder. This will take the form of a visual and audio alert that will notify you when the appointment is coming up. Hourly appointments have a 15 minute reminder by default, while all-day events will include a reminder 18 hours prior to the event.

To modify these settings, click Appointment \rightarrow Reminder \rightarrow [Time]:

								Untitled - A	opointment							
File	Appointme	nt	Insert For	mat Text	Review	🖗 Tell me what yo	ou want to do								and the second	
Save & De Close	lete 🕞 Forw	ıdar ard *	Appointmen	t Scheduling Assistant	s Skype Meeting	Meeting Notes	Invite Attendees	Show As:	Busy •	Recurren	nce Time Zones	Categorize	 Private I High Importance ↓ Low Importance 	Office Add-ins		
	Actions		Sh	ow	Skype Meet	ng Meeting Notes	Attendees		0 minutes		5		Tags	Add-ins		^
Subject									5 minutes							
Location									10 minutes							*
Start time	Tue 10/6/20	15		8:30 AI	4 -	All day event			30 minutes							
End time	Tue 10/6/20	15	E	9:00 AI	4 -				1 hour							
									2 hours	-						
									4 hours							
									5 hours							
									6 hours 7 hours							
									8 hours							
									9 hours							
									10 hours							
									0.5 days							
									18 hours							
									1 day 2 days							
									3 days							
									4 days							
									1 week							
									2 weeks							
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When the reminder is triggered by an upcoming event, it will appear in a separate dialog box. The appointment subject, start time, and location will be listed. You will be given an option to dismiss the reminder, as well as open the appointment to view its details. Additionally, you can choose to be reminded again by clicking the Snooze button. This action will remind you five minutes later by default, but you can customize this duration using the provided drop-down menu:

📮 1 Reminder(s)	– ×
Staff Meeting 9:00 AM Tuesday, October 6, 2015	
Staff Meeting	23 minutes
	Dismiss
Click Snooze to be reminded in:	
5 minutes before start Snooze	Dismiss <u>A</u> ll

SHOW AS OPTIONS

When adding an appointing using the Appointment form, you have the option to indicate your status during this period. This helps anyone looking at your calendar to identify when you are and are not available. To choose a Show As option, click Appointment \rightarrow Show As \rightarrow [Show As Option]:

B	5	¢	Ŷ	Ψ	Ŧ	-					Staff Me	eting -	Арро	intment		
File	A	ppointment		Insert	Forn	nat Text	Review	Q	Tell me what yo	u want to do)					
2	$\boldsymbol{\times}$	🔄 Calenda	r				E		NB		🚾 Sho	w As:	B	usy •	\mathbf{O}	
Save &	Delete	🕞 Forward	Ŧ	Appoint	ment	Scheduling	Skype		Meeting	Invite	🐥 Rem	ninder:		Free	ice	Time
Close	۸d	ions			Sho	Assistant	Meetin Slovne Mee	g tina	Notes Meeting Notes	Attendees			8	Working Elsev	where	Zones
	Att	10115			5110		Skype mee	ung	invice ing notes	Attenuees				Tentative		
														Busy		
														Out of Office		

There are five options that you can choose from: Free, Working Elsewhere, Tentative, Busy, and Out of Office.

- The **Free** option will indicate to others that you are available during this time even though you have an appointment.
- The **Working Elsewhere** option will indicate to others that you are available but working at a different location than you normally do.
- The **Tentative** option indicates that you might be available.
- The **Busy** option indicates that you are unavailable during this time.
- The **Out of Office** option shows you as being unavailable and out of the office entirely.

THE PRIVATE OPTION

When creating a new appointing using the Appointment form, you can mark it as private by clicking Appointment \rightarrow Private:

	B	5	Ç	Ŷ	Ŷ	÷				Staff Meeting - Appointment					
		Ap	pointment		nsert F	Format Text	Review Q	Tell me what yo	u want to do						
	2	X	🔄 Calenda	r			e	N		Show As: Busy	·			Private	
5	iave & Close	Delete	😋 Forward	*	Appointm	ent Scheduling Assistant	Skype Meeting	Meeting Notes	Invite Attendees	🐥 Reminder: None	* Recurrence	Time Zones	Categorize	↓ Low Importance	Office Add-ins
		Acti	ons			Show	Skype Meeting	Meeting Notes	Attendees	Option	s			Tags	Add-ins

By marking an appointment private you can hide the details from anyone who is able to view your calendar, but still mark yourself as unavailable during the specified time.

You can identify such entries in your calendar by the lock icon:



CATEGORIZING APPOINTMENTS

Like other Outlook objects, you can categorize appointments so that you can keep them better organized. To categorize an appointment, first select the appointment in question, and then click Calendar Tools – Appointment \rightarrow Categorize \rightarrow [Category]:

		5		Ŧ							Calendar Tools			Cal	endar	- jsmith@acme	ewidgets.or
File			lom	e	Se	end /	/ Rece	eive	Folder	View	Appointment	Q Tell me	what	t you wa	nt to	do	
Open	De	elete	Fc	rwar	rd	M Meet	eetin Notes	g lotes	Invite Attendees Attendees	🚾 Show 🐥 Remin	As: Busy nder: None Options	Recurrence	ce	Categor	ize J	Private High Importa Low Importar	nce
4	U N	MO	Octo TU	ber a	2015 ТН	FR	► SA	<	• •	Octo	ber 5 - 9, 20	015		BI	ue cat	tegory	ı, Massacl
2	27	28	29	30	1	2	з			MONDAY	1		τu	Re	ed cat	eaorv	
	4	5	6	7	8	9	10			5			6	0	range	category	
1	11	12	13	14	15	16	17							Pi	Irple (category	
2	25	26	20 27	21	22 29	25 30	24 31		8 ^{AM}					Ye	llow	category	
						_							Do	<u>A</u> I	l Cate	gories	
		N	ove	mbei	r 201	5	54		9				00	Se	t <u>Q</u> ui	ck Click	
د	1	2	3	4	5	6	5A 7		10								

The Clear All Categories option in this menu will remove all categories from the item. To clear a single category, click Categorize and click the category to remove from the item.

Alternatively, you can right click an appointment and click Categorize \rightarrow [Category]:

Appointment				
	2	<u>Q</u> uick Print		
	44	Invite Attendee	s	
	P.	For <u>w</u> ard		
	6	Pri <u>v</u> ate		
		<u>S</u> how As	►	
		Ca <u>t</u> egorize	►	<u>C</u> lear All Categories
	Ф,	Meeting <u>N</u> otes		Blue category
	$ \mathbf{x} $	<u>D</u> elete		Green category
				Red category
				Orange category
				Purple category
				Yellow category
				<u>A</u> ll Categories
				Set Quick Click

(Remember, when choosing a category for the first time, you will be prompted to give it a name.) Once it is categorized, an appointment will be shown in the color of the category that was selected:

Doctor Appointment

SETTING APPOINTMENT PRIORITY

Like messages, you can assign a priority level to an appointment. If it is a particular important appointment you can give it a high priority level, but if it is an appointment that can be moved you can give it a low priority level.

To set appointment priority, first select the appointment in question. Then, click Calendar Tools – Appointment and choose High Importance or Low Importance:



You can also find these commands on the Appointment tab when creating the appointment:

	িচ েটে ↑	↓ =		:	Staff Meeting	g - Appointment		Y.	E	⊞ –)		×
	Appointment	Insert Format	at Text Review	💡 Tell me what yo								
Save & Close	Delete G Forward *	Appointment So	cheduling Assistant Meetin	Meeting g Notes	Invite Attendees	Show As: Busy Reminder: 15 minutes	Recurrence	ime Cones	Categorize	mportance	Office Add-ins	
	Actions	Show	Skype Me	ting Meeting Notes	Attendees	Options		5	Tags		Add-ins	~

SEARCHING APPOINTMENTS

As your calendar becomes more crowded, it can become more difficult to find the specific appointment that you would like to work with. To make finding appointments simpler, a search text box has been provided near the top right-hand corner of the Calendar workspace.

To use this feature, first click inside of the search field (or press Ctrl + E) and type the keywords that you would like to search for:

	T	-	×
	Se Victoria and S		
			~
	Doctor		ρ
L	Keyword	: Doctor	
	Organize	r: Doctor	
	Subject:	Doctor	

A list of results will immediately be shown that you can then work with:

日	5	;				Search Te	ools		Calenda	r - jsmit	h@acmewidg	jets.onm	icrosoft.com ·	Outlook				E	- 0) X
File						Search	h 🖓	Tell me what												
All Calend Items	Gurr Subf ar E All C Scope	ent Folder olders Jutlook Ite	ms Old	nclude er Results Results	Organizer	Subject Ad) Has ttachmen	Categorized ts v Refine	Requests Not Responded To -	More	Recent Searches * Optio	Search Tools *	Close Search Close							^
A MU Ca	landare		<											Doctor						×
Cal	endar			D.e	SUBJECT			LOCATION	START			END		RECURRENCE PA	TTERN		CATEGORI	ES		
				⊿ Re	currence: (no	one): 1 item	n(s)													
Other	Calenda	rs			Doctor Appo	pintment			Tue 10	/6/2015	9:00 AM	Tue 1	0/6/2015 9:30 /	м			0			
-		101																		
nat I	20																3 00			
Items: 1														All folders are up to date.	Connected to: Micros	loft Exchange	- uu -	-		 100%

Additionally, the Search Tools – Search contextual tab will be displayed on the ribbon. Here, you can narrow down your search even further by adding more search criteria like subject, category, and much more.

When you have finished searching, click Search Tools – Search \rightarrow Close Search:

	ن ج	:			Search Tool	s		Calenda	r - jsmith	n@acmewid	gets.onm	icrosoft.ce	or
File	Home	Send / Rece	ive Folder	View	Search	Q	Tell me what	you want to do					
All Caler	Curro Curro Mar	ent Folder olders	C L D Include	Organizer S	Subject	() Has	Categorized	Requests Not	More	ہے Recent	İ Search	Close	
ltem	s 🔚 All O	utlook Items	Older Results		Atta	chment	s *	Responded To *	Ŧ	Searches -	Tools *	Search	
ltem	s all O Scope	utlook Items	Older Results Results	orgunizer	Attao	chment	Refine	Responded To *	*	Searches • Optic	Tools *	Search	

PRINTING APPOINTMENTS

To print an appointment from the Appointment form, click File \rightarrow Print \rightarrow Print:

E	Doctor Appointment - Appointment ?	x
Info	Print	
mo Save As Save As Save As Save As Save As Save As Close Office Account Office Account Office Account	Specify how you want the then to be printed and then click Print. Printer Printer Printer Printer Print Contorns Print Options Settings Memo Style	
	4 1 of 1 ▶	800

Doctor Appointment LQ. Quick Print 2 Invite Attendees 2 For<u>w</u>ard 8 Private Show As Þ Categorize ₽ Meeting Notes Delete

Alternatively, you can right-click on an appointment in your calendar and click Quick Print:

This option will print the appointment details using the default printer and its default configuration.

FORWARDING APPOINTMENTS

Outlook objects, including appointments, can be shared amongst other people who use Outlook as an e-mail client. To forward an appointment to other people so that they can view it and add it to their own calendars, click Appointment \rightarrow Forward (with the Appointment form open):

	ر ه	Ç	Ŷ	Ψ	÷				Do	ctor Appointme	nt - Appointme	nt	
File	A	ppointment		Insert	Forma	it Text	Review (🖓 Tell me what yo	u want to do				
2	X	🖸 Calenda	r				E	N		W Show As:	Busy	·	
Save & Close	Delete	S Forward	Ŧ	Appointn	nent S	cheduling Assistant	Skype Meeting	Meeting Notes	Invite Attendees	🐥 Reminder:	None	- Recurrence	Time Zones
	Act	ions 6			Show		Skype Meetin	ng Meeting Notes	Attendees		Options		

Alternatively, you can right-click an appointment in your calendar and click Forward:

Doctor Appointment	_		
n	-	Quick Print	
	44	Invite Attendees	
	9	For <u>w</u> ard	
	6	Pri <u>v</u> ate	
	~~~	<u>S</u> how As	►
		Ca <u>t</u> egorize	►
	<b>N</b>	Meeting <u>N</u> otes	
	X	<u>D</u> elete	

In either case, a new Message form will be displayed with the selected appointment included as an attachment:

File	Message	Insert	Options	Format Text	Review	♀ Tell me what	you want t	o do					
Paste	K Cut È Copy I Format Pair lipboard	nter Fa	- I <u>U</u> a <u>v</u>	<ul> <li>A[*] A[*]   ⋮Ξ</li> <li>A →   Ξ Ξ</li> <li>Basic Text</li> </ul>	- E -   & =   = =	Address Check Book Name Names	Attach File *	Attach Signatur Item * * Include	<ul> <li>Follow Up *</li> <li>High Importance</li> <li>Low Importance</li> <li>Tags</li> </ul>	Office Add-ins			~
	То												
Sand	Cc												
Jena	Subject	FW: Docto	or Appointmen	t									
	Attached		octor Appointr utlook item	nent - 🗲									

Simply complete and send the message as normal to finish the process.

## **ACTIVITY 5-2**

### **Managing Appointments**

You have an upcoming doctor's appointment that you would like to schedule in your calendar.

1. To begin, open Outlook 2016:

- 5 ÷		Inbox - jsmith@acmewidgets.onmicrosoft.com - Outlook 🔲 –	- 🗆 🗙
File Home Send / Receive			
New New Delete	Reply Reply Forward Report	To Manager Done Control New Control New Control New Control New Control New Control New New New New New New New New	~
▲ Favorites	Search Current Mailbox ( 🔎 Current Mailbox 🔹	🕞 Reply 🚱 Reply All 😂 Forward	
Inbox 4 Clutter Sent Items Drafts	All Unread By Date * Newest ↓ ▲ Tomorrow John Smith Joe KRetirement Fri 10(2)(2015 1:37 FM Hey all, Joe is going to be	John Smith <above:jest@outlook.com></above:jest@outlook.com>	ĝ 1 10/2/2015 ✓
▲ jsmith@acmewidgets.onmicr	▲ Last Week	Action Items	
Inbox 4 Drafts	msftconn@microsoft Program Closing - Office 20 Mon 9/21	Hey all,	
Sent Items Deleted Items 3	4 Older	Joe is going to be retiring soon, so I thought we could throw a small celebration. Please let me know your availability for next	week.
Clutter Conversation History	OneNote Team Welcome to OneNote 7/31/2015 Get OneNote for free on all	Thanks,	
Junk Ernail Outbox RSS Feeds ▷ Search Folders	There are more items in this folder on the server Click here to view more on Microsoft Exchange	John	
> Groups			
≥ m 2° છે ···			

2. Display the Calendar workspace by clicking the Calendar button in the Navigation pane:



**3.** If the Week grid arrangement option is not already applied, click View  $\rightarrow$  Week:

	5	÷									
File	Hon	ne	Send / Re	ceive	Folde	r V	iew	Q	Tell me what you	ı wa	nt to do
4	¢.	5							Time Scale •		
Change View 🔻	View Settings	Reset View	Day	Work Week	Week	Month	Scheo Vie	lule w	C Working Hour	s	Color
Cu	rrent Viev	N			63	Arrange	ment			G.	Color

(If this option is already applied, skip to the next step.)

**4.** Create a new appointment by clicking Home  $\rightarrow$  New Appointment:

										Cal
File	Home	Send /	Receive Fo	lder	View	Q Tell	me wha	it you w	ant to d	o
			<b>E</b>	·C						
New	New	New	New Skype	Today	Next 7	Day	Work	Week	Month	Schedule
Appointme	nt Meeting	Items -	Meeting		Days		Week			View
63	New		Skype Meeting	Go 1	To 🕞			Arrange		Es l

5. The Appointment form will now be displayed:

	5 de la	h ↓ ≠	t Tout	Parine (	) Tall manufacture	uuuna ta da	Untitled - Ap	opointment					-	-	×
Save & I Close	Actions	Appointment S	cheduling Assistant	Skype Skype Skype Meeting	Meeting Notes Meeting Notes	Invite Attendees	Show As:	Busy 15 minutes Options	Recurrence	Time Zones	Categorize	Private High Importance Low Importance Tags	Office Add-ins Add-ins		~
Subject Location Start time	Tue 10/6/2015		9:00 AM	×	All day event										
End time	Tue 10/6/2015	0	9:30 AM	•											

6. Inside the Subject field, type "Doctor's Appointment:"

	ా ె							Untitled - Ap	opointment					
File	Appointm	ent	Insert For	mat Text	Review Q	Tell me what yo	u want to do							
Save & I Close	Delete 🕞 For	endar vard 👻	Appointmen	t Scheduling Assistant	Skype Meeting	Meeting Notes	Invite Attendees	Show As: Reminder:	Busy 15 minutes	• O • Recurrence	<u>Time</u> Zones	Categorize	<ul> <li>Private</li> <li>High Importance</li> <li>Low Importance</li> </ul>	Office Add-ins
	Actions		Sh	DW	Skype Meeting	Meeting Notes	Attendees		Options		5		Tags	Add-ins
Subject	Doctor's	ppoint	ment 🔶											
Location														
Start time	Tue 10/6/	2015		9:00 AM	×	All day event								
End time	Tue 10/6/	2015		9:30 AM	-									

7. In the Location field, type "ABC Plaza:"

	<b>5</b> č	Ŷ	ψ	÷	Doctor's Appointment - Appointment												
File	Appointment		Insert Fo	rmat Text	Review Q	Tell me what yo	u want to do										
Sug &	X 🖸 Calend	ar	Appointmen	st Scheduling	Share	Meeting		Show As:	Busy		( Time	Catagoriza	<ul> <li>Private</li> <li>High Importance</li> </ul>	Office			
Close	Forwar	-	Appointmer	Assistant	Meeting	Notes	Attendees	🐥 Reminder:	15 minutes	+ Recurrence	Zones	- categorize	Low Importance	Add-ins			
	Actions		Sh	low	Skype Meeting	Meeting Notes	Attendees		Options		5		Tags	Add-ins			
Subject	Doctor's App	ointm	ient														
Location	ABC Plaza ┥	_															
Start time	e Tue 10/6/201		E	9:00 AN	1 ×	All day event											
End time	Tue 10/6/201			9:30 AN	1 ~												

**8.** From the "Start time" drop-down menu, choose Friday of the current week:

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File	А	ppoin	itmei	nt	Ir	sert		Form	nat	Text	Review	Q	Tell me what yo	u want to do.
2	K	Eq. (	Calen	dar							<b>E</b>			
Save & De Close	lete	C_3 F	orwa	ard	•	Арр	ointı	ment	Sc A	heduling Assistant	Skype Meetin	g	Meeting Notes	Invite Attendees
	Ad	ions						Sho	w		Skype Me	eting	Meeting Notes	Attendees
Subject	[	Doctor	r's Ap	poir	ntme	nt								
Location	A	BC Pla	aza											
Start time	1	ue 10,	/6/20	15					Į	9:00 AM		•	All day event	
End time	1	•		Octo	ber	2015	i -	•	•	9:30 AM		-		
		SU	мо	TU	WE	TH	FR	SA	┢					
		27	28	29	30	1	2	3						
		4	5	6	7	8	٩	10						
		11	12	13	14	15	16	रे 17						
		18	19	20	21	22	23	24						
		25	26	27	28	29	30	31						
		1	2	3	4	5	6	7						
					Toda	y								

9. Next, choose 1:00 PM as a start time:

	<b>5</b>	Ť	ψ	÷					Doct
File	Appointment	In	isert	Format	Text	Review	Q	Tell me what yo	u want to do.
2>	🧲 🔄 Calenda	r				<b>(</b>	3	N	
Save & Del Close	ete 😋 Forward	-	Appointm	nent Sc A	heduling	Skyp Meetir	e ng	Meeting Notes	Attendees
	Actions			Show		Skype Me	eting	Meeting Notes	Attendees
Subject	Doctor's Appo	intmer	nt						
Location	ABC Plaza								
Start time	Fri 10/9/2015				9:00 AM		Ŧ	All day event	
End time	Fri 10/9/2015				11:30 AM 12:00 PM	1	^		
					12:30 PM	I			
					1:30 PM	5			
					2:00 PM				
					2:30 PM		~		

**10.** Examine the "End time" drop-down menus. You will see that the date now matches the one shown in the "Start time" field. Additionally, the end time has automatically been set to a half hour after the start time. For this example, choose 3:00 PM as an end time:

	5 ¢ 1	ψ	÷					Doct
File	Appointment	Insert i	Format	Text	Review	Q	Tell me what yo	u want to do
2>	🧲 🗟 Calendar				P	E		
Save & Del Close	ete 🕞 Forward 🔹	Appointm	ient Scl A	hedulin ssistant	g Skyp Meetin	e ng	Meeting Notes	Invite Attendees
	Actions		Show		Skype Me	eting	Meeting Notes	Attendees
Subject	Doctor's Appointr	nent						
Location	ABC Plaza							
Start time	Fri 10/9/2015			1:00 PM	1	•	All day event	
End time	Fri 10/9/2015			1:30 PM	4	-		
			1:0	0 PM (0	) minutes) () minutes)	^		
			2:0	0 PM (1	hour)			
			2:3	0 PM (1	.5 hours)			
			3:0	0 PM (2	hours)			
			3:3	0 PM (2	1.5 hours) 🕫			
			4:0	U PIVI (:	nours)	$\sim$		

**11.** As you are going to be out of the office during this period, you need to change the Show As option to reflect that. Click Appointment  $\rightarrow$  Show As  $\rightarrow$  Out of Office:

	5 č	Ŷ	ψ	÷				Doc	tor's Appointme	nt - A	Appointment	
File	Appointment	1	nsert	Form	at Text	Review Q	Tell me what yo	u want to do				
2>	🗲 🗉 Calendar					<b>e</b>			w Show As:	В	usy 🔹	$\odot$
Save & Dele Close	ete 🕞 Forward	Ŧ	Appointr	ment	Scheduling Assistant	Skype Meeting	Meeting Notes	Invite Attendees	🐥 Reminder:		Free	
	Actions			Show	N	Skype Meeting	Meeting Notes	Attendees			Tentative	wnere
Subject	Doctor's Appoi	ntm	ent								Busy	
Location	ABC Plaza										Out of Office	

**12.** Now make this appointment private by clicking Appointment  $\rightarrow$  Private:

	H					Doc	tor's Appointment - Appointment			
	File	Appointment	Insert Format Text	Review Q	Tell me what yo	u want to do				
1	?	🗙 🛛 Calendar		<b>E</b>	N		Show As: Out of 0 •		B Private	
S	ave & Close	Delete 🕞 Forward 🕤	Appointment Schedulin Assistant	g Skype Meeting	Meeting Notes	Invite Attendees	Recurrence	Time Zones	Categorize	Office Add-ins
		Actions	Show	Skype Meeting	Meeting Notes	Attendees	Options	r _a	Tags	Add-ins

**13.** Click Appointment  $\rightarrow$  Save & Close:



**14.** Returning to your calendar, you will see the new appointment. Note the lock in its lower right-hand corner that designates it as private:



**15.** Close Microsoft Outlook 2016.

# **TOPIC C: Manage Meetings**

Meetings are calendar events that involve other people and (optionally) organizational resources. By using Outlook's calendar to schedule meetings, you are better able to communicate with and manage attendees. Over the course of this topic, you will learn how to manage meetings in Outlook 2016.

#### **Topic Objectives**

In this topic, you will learn:

- About the meeting scheduling process
- About the Meeting form
- How to use the Room Finder and the Scheduling Assistant
- How to share meeting notes using OneNote
- About meeting response options
- How to respond to a meeting request
- How to update a meeting request
- How to cancel a meeting request
- How to propose a new time for a meeting

#### THE MEETING SCHEDULING PROCESS

To schedule a new meeting in your calendar, you must first create and send a meeting request. To do this, click Home  $\rightarrow$  New Meeting while in the Calendar workspace:



This action will display the Meeting form:

⊟	ත එ	↑ ↓ =		Untitled - M	leeting		⊠ – ⊡ ×
File	Meeting	Insert Format Text	Review 🛛 🖓 Tell me wha	it you want to do			
Delete	Calendar	Appointment Scheduling Assistant	Skype Meeting Meeting Notes	Cancel Address Check Response Invitation Book Names Options -	Show As: Busy Recurrence Reminder: 15 minutes Options	e Time Room Zones Finder	Private High Importance Low Importance Add-ins
<b>()</b> Yo	a haven't sent th	s meeting invitation yet.					Room Finder ××
र्ष् <u></u> send	To Subject Location Start time End time	Tue 10/6/2015 Tue 10/6/2015	10:00 AM	All day event		*) Roomi	Codeber 2015 →     Solution (1) + 1 = 2 = 3     Solution (2) + 1 = 2     Solution (2) + 1     Solution

Using the controls in this form, you can then construct the meeting and send a meeting request. The meeting will automatically be added to your calendar (as the organizer). Recipients will then respond to the request and let you know if they are available to attend. If a recipient chooses to accept the invitation, the meeting will appear on their own calendar.

#### THE MEETING FORM

Upon clicking the New Meeting command on the Home tab or choosing to respond to a message with a meeting request (Message  $\rightarrow$  Meeting), the Meeting form will be displayed in a separate window:

File	ි ් Meeting	↑ ↓ ÷ Insert FormatText	Review Q Tell me	Untitled - I	Aceting		■ – □ ×
Delete	Calendar	Appointment Scheduling Assistant Show	Skype Meeting Skype Meeting Skype Meeting Meeting	Rg Invitation Book Names Options Attendees	Reminder: 15 minutes Prevence	Time Room Zones Finder	Private High Importance Low Importance Tags Add-ins
() Ye	u haven't sent th	is meeting invitation yet.					Room Finder • ×
1 Sent	To Subject Location Start time End time	 Tue 10/6/2015 Tue 10/6/2015	1000 AM	All day event		v Rooms	October 2015     Solution     Solution

The Meeting form includes a variety of different fields:

• The **To** field allows you to enter the e-mail addresses of the meeting's attendees.

- In the Subject field, you can enter a quick description of the meeting that will appear on the calendar.
- In the Location field, you can enter where the meeting will take place. (If configured, you
  may have the option to choose from a selection of available rooms in your organization.)
- The "Start time" and "End time" menus allow you to choose when the meeting will start and end.
- Additionally, the "All day event" checkbox is provided if the event you are adding spans an entire day.
- Inside the **Meeting form body**, you can add more details or notes about the meeting.

#### **Meeting Reminders**

Just like appointments, you can set reminders for any meetings that you create or agree to attend. While the organizer of the meeting sets the default reminder time, each attendee can modify this option to suit their own preference.

To modify the reminder settings, open the meeting and click Meeting  $\rightarrow$  Reminder  $\rightarrow$  [Reminder Setting]:



#### **Resource Booking Attendant**

The Resource Booking Attendant is used to facilitate any shared resources that your organization may have, including rooms that are used for meetings. It works by automating responses to booking or cancellation requests. Using this system, you can set policies that can controls how resources are shared and prevent double bookings. This feature can be enabled by your Microsoft Exchange Server administrator.

#### THE ROOM FINDER PANE

The Room Finder pane is used to help you find and select an available room for a meeting that you are organizing:

Room Finder	÷ ×
November 2015	•
Su Mo Tu We Th Fr	Sa
25 26 27 28 29 30	31
1 2 3 4 5 6	7
8 9 10 11 12 13 15 16 17 18 19 20 1	14 21
22 23 24 25 26 27	28
<b>29 30</b> 1 2 3 4	5
Good Fair	Poor
Choose an available room:	
None	
Boardroom A	
Suggested times:	
Suggested times:	^
Suggested times: 8:00 AM - 10:00 AM 1 available room	^
Suggested times: 8:00 AM - 10:00 AM 1 available room 8:20 AM - 10:20 AM	^
Suggested times: 8:00 AM - 10:00 AM 1 available room 8:30 AM - 10:30 AM 1 available room	^
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Suggested times: 8:00 AM - 10:00 AM 1 available room 8:30 AM - 10:30 AM 1 available room 9:00 AM - 11:00 AM 1 available room	^
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Suggested times: 8:00 AM - 10:00 AM 1 available room 8:30 AM - 10:30 AM 1 available room 9:00 AM - 11:00 AM 1 available room 9:30 AM - 11:30 AM 1 available room 10:00 AM - 12:00 PM 1 available room 10:30 AM - 12:30 PM 1 available room 11:00 AM - 1:00 PM 1 available room	

(If this pane is not already displayed, it can be opened by clicking Meeting  $\rightarrow$  Room Finder. As well, you can add meetings to the Room Finder pane if necessary, by clicking the Rooms button next to the Location field.)

The Room Finder pane will show a calendar with the date of the meeting that you are organizing selected. Below the calendar, you will see any available rooms. The "Suggested times" section includes a list of times for your meeting where all invitees are available. Additionally, it will show you any conflicts that exist between attendees and the selected resource for the currently selected start and end times.

#### THE SCHEDULING ASSISTANT

To help coordinate the meeting, the Scheduling Assistant has been provided. To use this feature, first populate the Meeting form with all the attendees and resources that you require and set the date when you would like the meeting to take place. Next, click Meeting  $\rightarrow$  Scheduling Assistant:



When activated, the Scheduling Assistant will display any conflicts between the availability of your attendees and any resources that you might require. This provides an easy and simple way to coordinate a meeting so that everyone can attend:

	5 (	5 个	ψ	÷					Ur	titled - Me	eting						W.				×
File	Meeting	Insert	Format 1	Fext F	Review	♀ Tell me	what you wa	int to do													
Delete	🔄 Calendar 🕞 Forward Actions	. Appoints	ment Sched Assist	uling tant Sk	Skype Meeting ype Meetin	Meetin Notes g Meeting N	g Can Invita otes	el Addres tion Book Atte	s Check Names ndees	Response Options *	🚾 Sho 🐥 Ren	w As: ninde	Busy	* Ites * Re Options	ecurrence	Time Re Zones Fi	oom Ca nder	ategorize	<ul> <li>Private</li> <li>High Importance</li> <li>Low Importance</li> <li>Tags</li> </ul>	Office Add-ins Add-ins	~
12 Se	nd	0, 100% -							Tuesday,	October 6,	2015								Room Fir	nder	- ×
	All Attendee: John Smith Click here to	s add a name		12:00 PM			3:00			9:00				12:00 PM		2:00	3:00		<ul> <li>↓ Octob</li> <li>Su Mo Tou V</li> <li>4</li> <li>5</li> <li>6</li> <li>11 12 13</li> <li>11 11 12 13</li> <li>11 12 14</li> <li>11 14 /li> <li>11 14</li></ul>	er 2015 Ve Th Fr 00 1 27 7 8 9 14 15 16 12 22 23 28 29 30 4 5 6 Fair able room:	<ul> <li>Sa</li> <li>3</li> <li>10</li> <li>17</li> <li>24</li> <li>31</li> <li>7</li> <li>Poor</li> </ul>
																		_	Suggested time		
Add A	ttendees	Options *	Image: start time	Tue 1	0/6/2015	10	00 AM	· · · · · · · · · · · · · · · · · · ·										•	Suggested time Suggestions an because most a not available d working hours	e not provi ttendees a uring your	ded re
Busy	Tentative	Out of O	ffice 🕅 Wo	orking Else	where 🕅	No Informati	on 🔲 Out:	ide of work	ing hours												

To set a time for the meeting, click and drag an area on the grid:

						Tuesday, O	ctober 6, 20	15						
11:00	12:00 PM	1:00	2:00	3:00	4:00	8:00 AM	9:00	10:00	11:00	12:00 PM	1:00	2:00	3:00	4:0
							+	li+						

You can also click the Requirement column to choose whether this attendee will be required, optional, or just a resource (such as a room):



#### **Toggle Between Meeting Form Views Using the Show Commands**

To toggle back to the Meeting form from the Scheduling Assistant, click Meeting  $\rightarrow$  Appointment:

B		<b>5</b>	ര	Ŷ	Ψ	÷					U	ntitled - Mee
File		Meet	ing	Insert	Form	nat Text	Review	♀ Tell me what	you want t	o do		
X	Ξą	Calenc	lar				<u></u>	N		44	<b>*</b> @	
Delete	9	Forwa	rd -	Appointm N	ent Scl A	heduling ssistant	Skype Meeting	Meeting Notes	Cancel Invitation	Address Book	Check Names	Response Options *
	Acti	ons		63	Show		Skype Meeting	Meeting Notes		Atten	dees	

To return to the Scheduling Assistant, click Meeting  $\rightarrow$  Scheduling.

#### **SHARING MEETING NOTES USING ONENOTE**

As people commonly take notes during meetings, Outlook offers an easy way to start taking notes with Microsoft OneNote and collaborate with other attendees. To do this, click Meeting  $\rightarrow$  Meeting Notes:



This will display the Meeting Notes pop-up. Click "Share notes with the meeting:"



From there you can choose the OneNote notebook page that you would like to share with the attendees. Click OK once you have chosen a location:

Choose Notes to Share with Meeting	×
Pick a page for notes, or pick a section and a new page will be created:	
	P
All Shared Notebooks	
🗆 📃 Meeting Notes	
E – New Section 1	
🗋 Untitled page	
Only people who have access to the notebook will be able to use the ne	otes.
Check who has access to the selected notebook	
New Notebook OK Cance	I

(Remember that the notebook with the page must be in a sharable location, such as your OneDrive account or on SharePoint.)

Now when you send out the meeting invite, the attendees will have a link to your meeting notes.

#### **MEETING RESPONSE OPTIONS**

When a meeting attendee receives a meeting request, they will be given the option to respond via buttons above the message in the Reading pane, or in the Meeting tab in the Meeting window:

H	501.4			Staff	Meeting - Meeting								2-0	• ×
File Delete	Accept Tentative Decline Propose New	Respond Notes	Q Calendar	Phone Screen Team Email Reply & Delete	G To Manager ✓ Done ۶ Create New	4	Move *	Mark Upread	Categorize	Follow	Translate	Find Related * Select *	Q Zoom	
Delete	Respond	Meeting Notes	Calendar	Quic	k Steps	- 6	Move		Tags	- ° 6	Editin	,	Zoom	~
•	Jane Gibson John Smith Staff Meeting													10/8/2015
Plea This	ise respond. I meeting has been adjusted to reflect your	r current time zone. It was	initally create	d in the following tim	ie zone: (UTC-05:00) E	astern 1	Time (US & C	anada).						~
When	Friday, October 9, 2015 10:30 AM-11:30 AM	I Location Boardro	om 101A											^
10 ^{-AM}														*
11	Staff Meeting Boardroom 101A Jane Gibson													
12 ⁸⁴														v

The options are as follows.

- Accept: Clicking Accept will add the meeting to your calendar and confirm your attendance. The Accept drop-down button includes options to accept and send a response to the meeting organizer, accept and not send a response, or accept and edit the response.
- **Tentative**: The Tentative option is used when you are not sure that you will be able to attend. Like the other options, you can choose to accept and send a response to the meeting organizer, accept and not send a response, or accept and edit the response.
- Decline: If you are unable to attend a meeting, you can choose the Decline option. You
  have the option to decline and send a response to the meeting organizer, decline and not
  send a response, or decline and edit the response.
- Propose New Time: If you have a scheduling conflict with a meeting request, you can propose a new time that works better for you (if the meeting organizer has enabled this option). Outlook will add the meeting to your calendar using your suggested time. The meeting organizer can then choose to accept or reject your proposal.

#### **Other Response Options**

Aside from the basic meeting response options, you also have access to some other options using the Respond drop-down command:



Choosing one of the options under this command will interact with the message as if it were a regular e-mail. It will not respond to the meeting on your behalf.

#### UPDATING A MEETING REQUEST

To update a meeting request, first open the meeting by double-clicking its entry in the calendar. From there, you can make any changes that you wish. For example, in this case the time was moved to one hour later than it was when the request was originally sent out:

	5 e	↑ ↓ =				Staff	Meeting - M	feeting			5	⊠ –		×
File	Meeting	Insert Format Te	rt Review	♀ ♀ Tell me what	you want to a	lo					<b></b>			
Cancel 6 Meeting Actions	Appoir	ntment Scheduling Trac Assistant Show	king Skype N	pe Meeting Notes Neeting No	Contact Attendees *	Address Check Book Name Attendees	Response s Options *	Show As: Busy	PRecurrence	Time Room Zones Finder	Categorize	<ul> <li>Private</li> <li>High Importance</li> <li>Low Importance</li> <li>Tags</li> </ul>	Office Add-ins	s s 🔺
1 No resp	ponses have b	een received for this me	eting.									Room Fin	der	- ×
1-1	То	Jane Gibson										Octobe	er 2015 🕨	,
Send	Subject	Staff Meeting										Su Mo Tu W	e Th Fr 1	Sa
Update	Location	Boardroom 101A								*	Rooms	4 5 6	8 9	10
	Start time	Tue 10/6/2015		9:00 AM	• All da	/ event						18 19 20 2	1 22 23 2	24
	End time	Tue 10/6/2015	•	10:00 AM	•							1 2 3 4	4 5 6	7
												Good Choose an availut None Suggested time: Suggested time: because most at working hours.	Fair bile room:	led e

Whenever a change in the meeting has been made, the Send Update button will be shown instead of the Send button. Clicking the Send Update button will send a message to all the meeting participants to inform them of the change and apply that change to their individual calendars.

#### **CANCELLING A MEETING**

To cancel a meeting that you are the organizer of, first open the meeting. Then, click Meeting  $\rightarrow$  Cancel Meeting:



This action will allow you to send a cancellation message to the attendees of the meeting and remove it from your calendar:

H				Ψ						Staff Meeting	g - Meeti	ing		
File	Me	eting	Inser	t Form	at Text	Review	♀ Tell me what y	ou want to	do					
🖸 Calenda	ar d +	Appoir	ntment	Scheduling Assistant	Tracking	Skype Meeting	Meeting Notes	🚾 Show 🐥 Remin	As: Free	• 🧕 • Time Zones	Room Finder	Categorize	<ul> <li>Private</li> <li>High Importance</li> <li>Low Importance</li> </ul>	Office Add-ins
Actions				Show		Skype Meetir	Meeting Notes		Optio	ns			Tags	Add-ins
Send Cancellatio	on	Subject Locatio	t [ n [	Staff Meetin Boardroom 1	9 01A									
- 0		Start ti	me	Tue 10/6/201	5		11:00 AM	•	All day event					
		End tin	1e	Tue 10/6/201	5		11:30 AM	•						

When the attendees receive this message, the "Remove from Calendar" button at the top of the message will allow them to remove the meeting from their respective calendars:

🙀 Rem	iove from Calendar	
	Jahe Gibson John Smith 10/8/	/2015
$\sim$	Canceled: Staff Meeting	~
When	Friday, October 9, 2015 10:30 AM-11:30 AM Location Boardroom 101A	^
10 ^{AM}		
11	Canceled: Staff Meeting Boardroom 101A Jane Gibson	
12 ^{PM}		
		-

Alternatively, you can cancel a meeting by right-clicking on the meeting directly within the calendar and clicking Cancel Meeting:

an weeting, board	Ouick Print
-	
	New E-mail to Attendees
Q.	Reply
Q	Reply <u>A</u> ll
P,	For <u>w</u> ard
••••••	Pri <u>v</u> ate
	Show As
	Categorize
<b>N</b>	Meeting <u>N</u> otes
·····	Cancel Meeting

This action will display the Meeting form for the current meeting and allow you to send a cancellation notice.

#### **PROPOSING A NEW TIME FOR A MEETING**

If the organizer has enabled this option, you will see the Propose New Time drop-down command at the top of the meeting request in the Reading pane or on the Meeting tab:



Clicking this drop-down command will give you the option to tentatively accept the meeting time and propose a new time or decline the meeting request and provide a new proposed time. Clicking either option will display the Propose New Time dialog box:

Pro	pose New Time: Staff Me	eeting							×
Zoom	100%	~	Friday, Oc	tober 9, 201	15				
	L	4:00	8:00 AM	9:00	10:00	11:00	12:00 PM	1:00	
⊠₁	All Attendees								
	Jane Gibson								$\sim$
<ul> <li>•</li> /ul>	John Smith					Staff			
			_	_					
						_			
			_						
						_			
	· · · · · · · · · · · · · · · · · · ·								
									Υ.
0.414	official of the	<						>	
А <u>а</u> а	Others Options	Meeting	start time	Fri 10/9/201	5 🔳	12:00 PM	*		
< <	AutoPick Next >>	Meeting	end time	Fri 10/9/201	5	12:30 PM	*		
Busy	y 📝 Tentative 📕 Out of	f Office 🛛 🕅 V	Vorking Else	where 📃	Current Me	eting 📉 No	Informatio	n	
									_
Curre	ent Meeting Time				[	Propose Tim	e Ca	ancel	

Here, you will be able to see the schedules of all the invitees and choose a new time that you think would work better. Then, click Propose Time to send the request.

Once the organizer receives and views this message, they can then choose to accept the proposal or delete the message to reject it.



# **ACTIVITY 5-3**

## **Creating and Managing Meetings**

You have been asked to organize a meeting to go over the details of an upcoming project. This meeting needs to be held sometime next Monday. Students should pair up with another classmate for this activity and have access to a Microsoft Exchange Server or Office 365 e-mail account.

1. To begin, open Outlook 2016:



2. Display the Calendar workspace by clicking the Calendar button in the Navigation pane:



**3.** Apply the Month calendar grid arrangement by clicking Home  $\rightarrow$  Month:

	<del>ء</del> ج									Ca
File	Home	Send /	Receive Fo	lder	View	© Tell	me wha	it you w	ant to d	D
			<b>E</b>	R						
New Appointme	New ent Meeting	New ⊨ltems *	New Skype Meeting	Today	Next 7 Days	Day	Work Week	Week	Month	Schedule View
	New		Skype Meeting	Go	Го Гы			Arrange	13	E.

(If this view is already applied, skip to the next step.)

**4.** You will now see the calendar for the current month. Click to select the next Monday in the calendar:

·語 ち +		C.	slendar - jsmith@acmewidgets.or	nmicrosoft.com - Outlook			⊞ – ⊡ ×
File Home Send / Receive							
New New New New Appointment Meeting kerns - Meeting Stype Mee	pe Today Next 7 Day Days eting Go To 5	Work Week Month Schedule Week Arrange 5	Open Colendar Calendar - Groups - Manage Calendars	Share Publish Calendar Calendar Online - Permissions Share	Search People		
< October 2015 → <	<ul> <li>October 20</li> </ul>	15	Bosti	on, Massachusetts 🕘 🌙	Thursday Start (Search Calenda	ar (Ctrl+E)	م
SU MO TU WE TH FR SA	SINDAY	MONDAY	THISDAY	WEDNESDAY	THEROAY	FRIDAY	SATURDAY
4 5 6 7 8 9 10 11 12 15 14 15 16 17 16 19 20 21 22 23 24 25 26 27 28 29 30 31	Sep 27	28	29	30	Oct 1	2	3
November 2015							
SU MO TU WE TH TR SA 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 1 2 3 4 5	4	5	6	7	8	9 11:00an Staff Meeting: Boardroom 101A; Jane Gibson	10
6 7 8 9 10 11 12	11	12	13	14	15	16	17
Calendar							
Others Calendary							
Ouer Calendars	18	19	20	21	22	23	24
S 5 5	25	26	27	28	29	30	31
Items 1				All folders are	up to date. Connected to: Mic	resoft Exthance	+ 1025
				Altonetral	ap to anno 1200 Meteo de mete		

**5.** Click Home  $\rightarrow$  New Meeting:



6. The Meeting form will now be displayed:

H	* ∂	Ť	ψ ÷					Until	led - Meeting				<u> </u>		5		- m		×
File	Meeting	Insert	Format Text	Review	Q Tell me what	you want to	do								i etter				
Delete	EE Calendar 🕞 Forward 👻 Actions	Appointme S	nt Scheduling Assistant	Skype Meeting Skype Meeti	Meeting Notes ing Meeting Notes	Cancel A Invitation	ddress Chec Book Nam Attendees	k Response s Options *	Z Show As: Reminder	Busy 15 minuter	Recurrence	E Time Zones	Room Finder	Categorize	<ul> <li>Private</li> <li>High Importa</li> <li>Low Importa</li> <li>Tags</li> </ul>	ance	Office Add-ins Add-ins		,
() You	haven't sent this	s meeting inv	vitation yet.														Room Finde	er -	- ×
Send	To Subject Location Start time End time	Mon 10/12/	2015	8	00 AM -	] [] All day	event							v	Rooms		October 20     Su Mo Tu We T     2     2     3     2     3     5     4     5     6     7     3     4     5     6     7     7     4     5     6     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7     7	15 ► h Fr S 1 2 3 9 1 5 16 1 2 23 2 9 30 3 6 3 1 6 1 7 1 7 1 7 1 7 1 7 1 7 1 7 1 7	a 1 7 7 9 9 9 0 0 7 7 9 9
																	Suggested times:		
																	8:00 AM - 8:30 AM No conflicts		î
																	8:30 AM - 9:00 AM No conflicts		
																	9:00 AM - 9:30 AM No conflicts		
																	9:30 AM - 10:00 AM No conflicts		
																	10:00 AM - 10:30 AM No conflicts	M	

7. Inside the To field, type the e-mail address of your partner, whom you are inviting to the meeting:

					ed - Meeting				×
File	Meeting	Insert Format Text	Review 🛛 🖓 Tell me what	you want to do					
$\boldsymbol{\times}$	Calendar		Sa 🔊	🛼 🔮 🇞 🔎	Show As: Busy	۵ 🛃	Private		
Delete	😋 Forward 🔹	Appointment Scheduling Assistant	Skype Meeting Meeting Notes	Cancel Address Check Response Invitation Book Names Options *	Reminder: 15 minutes Recurrence	Time Room Catego Zones Finder *	orize	e Add-ins	
	Actions	Show	Skype Meeting Meeting Notes	Attendees	Options	r,	Tags	Add-ins	^
🔁 You	haven't sent thi	s meeting invitation yet.						Room Finder	~ ×
	То	Jane Gibson;						October 2015	•
1-1	Subject							Su Mo Tu We Th	Fr Sa
Send	Location						* Rooms	27 28 29 30 1 4 5 6 7 8	2 3 9 10
	Start time	Mon 10/12/2015	- 00.8 m	All day event				11 12 13 14 15 18 19 20 21 22	16 17 23 24
	End time	Mon 10/12/2015	8:30 AM -					25 26 27 28 29 1 2 3 4 5	30 31 6 7

8. In the subject field, type "Project ABC Meeting." In the Location field, type "Room 2110:"



**9.** Ensure that the date is the one that you selected before opening the Meeting form. Then, set the "Start time" drop-down menu to 10:00 AM and the "End time" drop-down menu to 11:00 AM:

H	ా	Ċ	Ŷ	$\Psi$	÷							F	Project ABC I
File	Ν	leeting	Insert	Format	Text	Review		2 Tell me wh	iat yo	u want t	o do		
X Delete	EQ Ca	lendar rward 🔻	Appointme	ent Schec Assis	uling tant	Skype Meetin Skype Me	e g	Meeting Notes	( In	Cancel vitation	Address Book Atter	Check Names	Response Options *
1 You	u haven	't sent thi	meeting in	vitation y	et.	- 11		,					
_		То	Jane Gibson										
== <b>·</b>	Sul	oject	Project ABC	Meeting									
Send	Loc	ation	Room 2110										
	Sta	rt time	Mon 10/12/	2015			10:00	AM	*	All d	ay event		
	En	d time	Mon 10/12/	2015			10:30	AM	~				
						10:00	MA (	(0 minutes) (30 minutes)	^				
						11:00	AM (	(1 hour)					
						11:30	MA (	(1.5 hourly)					
						12:00	PM (	(2 nours) (2.5 hours)					
						1:00	PM (	3 hours)	~				

**10.** With the meeting now configured, click the Send button:



**11.** Back at your calendar, you will see the new meeting that you are organizing appears as an entry on the currently selected date:

弱 <b>ち</b> ・		C,	lendar - jsmith@acmewidgets.or	microsoft.com - Outlook			🗃 – 🖬 🗙
File Home Send / Receive							
New New New New New Skype Medin New Skype Medin	pe Today Next 7 g Days ting Go To rs	Work Week Month Schedule Week Arrange rs	Open Calendar Calendar Groups V Manage Calendars	Share Publish Calendar Calendar Online * Permissions Share	Search People Address Book Find		~
	<ul> <li>October 20</li> </ul>	15	Boste	on, Massachusetts 🔸 🌙	Thursday 61°F/53°F Search Calend	ar (Ctrl+E)	٩
27 28 29 30 1 2 3	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
4         5         6         7         8         9         10           11         12         13         14         15         16         17           18         19         20         21         22         23         24           25         26         27         28         29         30         31	Sep 27	28	29	30	Oct 1	2	3
November 2015							
SU MO TU WE TH FR SA 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 1 2 3 4 5	4	5	6	7	8	9	10
6 7 8 9 10 11 12	11	12 10:00am Project ABC Meeting: Room 2110; John Smith	13	14	15	16	17
Calendar							
Other Calendars							
	18	19	20	21	22	23	24
■ # Ø ···	25	26	27	28	29	30	31
Hame 1				áll folder ar	un to date Connected to Mic	rosoft Exchange	
inging. 1				All folders are	up to use. Connected to: Mic	ivsvir uvnange 🔲 dp	- · · · · · · · · · · · · · · · · · · ·

**12.** Return to the Mail workspace by clicking the Mail button in the Navigation pane:



**13.** The meeting request that your partner sent should now be displayed within your inbox. Double-click it to open it:



**14.** Review this information. You will see that it conflicts with the meeting request that you already sent out. Click Meeting  $\rightarrow$  Decline  $\rightarrow$  Send the Response Now:



**15.** Your partner will receive a message that you declined the meeting request. Additionally, you will receive a message that your partner also declined your own meeting request:

Thu 10/8/2015 11:07 PM Jane Gibson Declined: Project ABC Meeting When Monday, October 12, 2015 10:00 AM-10:30 AM (UTC-08:00) Pacific Time (US & Canada). Location Room 2110 I Jane Gibson has declined this meeting.

16. Close Microsoft Outlook 2016.

# **TOPIC D: Print Your Calendar**

As the calendar in Outlook 2016 becomes a more important component in your day-to-day workflow, you may find the need to print a hard copy of it for reference. Over the course of this topic, you will learn about the various styles that you can use to print your calendar.

#### **Topic Objectives**

In this topic, you will learn:

About calendar print styles

#### **CALENDAR PRINT STYLES**

While the process of printing your calendar is relatively straightforward, you do have several different print styles to choose from. These print styles control the amount of detail that is included for each event, as well as how your calendar will appear on the printed page.

To print your calendar, display the Calendar workspace and then click File  $\rightarrow$  Print:



Within the Print category of Backstage view, the Settings section will include the various style options that you can choose from:

€ _		Calendar - jr	mith@acmewidgets.or	microsoft.com - Outlo	ook			? - 0
Info	Print							
<b>Open &amp; Export</b> Save As	Specify how you want the item to be printed and then click Print.							
Save Attachments	Print	Octob	er 2015			50 MO TU	We The Pr Se	November 2015 Se No 74 We Th Fr Se 
Save Calendar	Printer					8 8 7	3 35 50 51	3
Print	Send To OneNote 2013#:3 Ready	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	Print Options	542.5	20		55	- Curr	-	5
Office Account	Settings							
Options	Daily Style	4	5	6	7	8	9	10
edback			-	Ŭ	'	ľ	-	
it.	Weekly Agenda Style							
	Weekly Calendar Style							
	Monthly Style	11	12	13	14	15	16	17
	Tri-fold Style							
	Calendar Details Style	18	19	20	21	22	23	24
		25	26	27	28	29	30	31
		John Smith			1			10/6/2015 11:37 AM
		1 of 1 b						ß

Below is a breakdown of what each print style will look like:

- Daily Style: Selected by default, the Daily Style will print all the events for the current day. It divides the day into hourly time slots that are further divided into 30 minute rows. It also includes both the Daily Task List and an area for notes.
- Weekly Agenda Style: This style will display all the events for the current week with each day of the week having its own area. Any events that are listed include its subject, start and end times, and location.
- Weekly Calendar Style: The Weekly Calendar Style will also display all the events for the current week, but it will do so using a column for each day with each column divided into hourly time slots. Events that are listed include the subject, start and end times, and location.
- Monthly Style: The Monthly Style prints the current month out like a regular wall calendar. The days of the month are divided into a grid. Any events include the subject, start and end times, and location.
- **Tri-fold Style**: The Tri-fold Style is a three-paneled view that includes an agenda for the current day, a daily task list, as well as a grid for all the days of the current week.
- **Calendar Details Style**: This style is like the Daily Style but will only print the events and their details that occur on the selected day. All the information about the event is included.
- **Memo Style**: This style is only available if an event is selected within your calendar before you perform the Print command. This option will print all the details of the selected event.

## **ACTIVITY 5-4**

## **Printing Your Calendar**

For quick reference, you would like to print your calendar for the current work week and post it in your office. A printer is required for this activity.

1. To begin, open Outlook 2016:

	Move to: 7					
New New Single Clean Up * Delete Reply Reply Forward More All More New Delete Repond	9 🖂 Team Email G. Reply & Delete	Image: The standard of the standard sta				
Favorites     Search Current Malhox I.	Current Mailhox *					
Inhox 4 All Unread By Da Clutter 4 Tomorrow Sent Rems John Smith	te * Newest 4	gg rang gg rang ang ga ng pag ng ga ng pag				
Drafts Joe's Retirement Fri 10/3 Her all. Joe is going to be	2015 1:37 PM	Schedule.docx -				
4 ismith@acmewidgets.onmicr., 4 Last Week		Action Items				
Inbox 4 msftconn@microsoft Drafts Program Closing - Office 20	Mon 9/21	Hey all,				
Sent Items 4 Older		Joe is going to be retiring soon, so I thought we could throw a small celebration. Please let me know your availability for next week.				
Clutter OneNote Team Clutter Velcome to OneNote Conversation History Get OneNote for free on all	7/31/2015	Thanks,				
Junk Email There are more items in this fails Outbox RSS Feeds Click here to stew more on Mio	r on the server	John				
> Search holders > Groups						
Z m 24 2 ····						

Click File  $\rightarrow$  Print:

3.

2. Display the Calendar workspace by clicking the Calendar button in the Navigation pane:



**4.** Click the Printer drop-down menu and choose the printer that you would like to print your calendar to:

¢	
Info	Print
Open & Export	Specify how you want the
	then click Print.
Save Calendar	Printer
Print	Send To OneNote 2013#:3 Ready
Office Account	Seady
Options	Ready
Feedback	S Fax#:2 Ready
Exit	S Microsoft Print to PDF Ready

5. Next, you need to choose the calendar print style you would like to use. For this example, click Weekly Agenda Style:



**6.** Examine the print preview portion of the screen. You will see how your calendar will appear on the printed page:

¢	Calendar - jsmithi	Pacmewidgets.onmicrosoft.com - Outlook		? – 🗆 X
info	Print			
Open & Export	Specify how you want the item to be printed and the cited Daint did Daint			Î
Save Attachments	Print Disk Print.	September 28, 2015 October 4, 2015	Exploration 2018         Consider 2018           Schle Trove Tri, Ir Sp.         Schle Trove Tri, Ir Sp.           4, 7, 1, 2, 3, 1, 1, 1, 2, 3, 4, 1, 1, 1, 2, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1,	
Save Calendar	Printer	Monday, September 28	Tuesday, September 29	
Print	Ready			
Office Account	Print Options			
Options	Settings			
Feedback	Daily Style			
Exit	Weekly Agenda Style	Wednesday, September 30	Thursday, October 1	
	Weekly Calendar Style			
	Monthly Style			
	Tri-fold Style			
	Calendar Details Style			
		Friday, October 2	Saturday, October 3	
			Sunday, October 4	
		John Smith	1 1943/011-0149	
				, ,
	4 1 of 5 >			19 10 H

7. Click Print:



**8.** A copy of your calendar in the Weekly Agenda Style will now have been printed to the printer that you specified. Close Microsoft Outlook 2016.

# Summary

During this lesson, you learned about the many ways that you can manage your calendar and add both appointments and meetings. You should now feel comfortable working with the different types of calendar grid arrangements that are available, as well as adding and managing both appointments and meetings. You should also feel comfortable printing your calendar using a variety of different calendar print styles.

# LESSON 6: MANAGING YOUR CONTACTS

## **Lesson Objectives**

In this lesson you will learn how to:

- Create and update contacts
- View and organize contacts

# TOPIC A: Create and Update Contacts

As the core functionality of Outlook 2016 revolves around communication and interaction with other people, saving and managing contact information is very important. Over the course of this topic you will learn all about contacts in Outlook 2016, including how to manage them and how to import them from other sources.

#### **Topic Objectives**

In this topic, you will learn:

- About contacts
- About the People workspace
- About the Contact form
- How to link notes to a contact
- Techniques for tagging contacts
- About secondary address books
- How to import, forward, and delete contacts

#### **CONTACTS**

In Outlook 2016, the term **"contact"** is used to describe any individual whom you need to communicate, or have communicated, with. Just like a hard copy address book, Outlook contacts include the contact's name, address, phone numbers, e-mail address(es), and other details like their job title and even photos. While Outlook 2016 can automatically create suggested contacts based on messages you send to recipients who are not already a contact, you also have the option to create contacts manually.

To view, create, and manage contacts in Outlook 2016, display the People workspace by clicking the People button in the Navigation pane:


## THE PEOPLE WORKSPACE

When the People workspace is displayed, you will see the ribbon, Folders pane, working area, and Reading pane. Inside the working area, you will see a list of contacts. The details for the selected contact will be displayed in the Reading pane:

	Folder View 🗘 Tell me what you want to do	Contacts - junith@acmewidgets.onmicrosoft.com - Outlook	- • ×
New Group New Contact New Group Items*	Delete Meeting More People Business C	State         Open Share         Open Share </td <td>Book</td>	Book
My Contacts     Skype for Business Contacts     Contacts	Search Contacts (Cirl+8) P 123 a b c	Jane Smith	Edit
	a a b b j k l m n a p q c t t t t t t t t t t t t t	CONTACT NOTS Calendar View Source Schedule e meeting Schedule e meeting Schedule e meeting Luk Contacts Schedule e meeting Luk Contacts Unit Contacts Work ABC Widgets Inc.	
E 28 2 ····	20	All folders are un to date. Connected to: Microsoft Exchange 🔲 🔟	+ 100%

## THE CONTACT FORM

Contacts are created and managed using the Contact form. To create a new contact using the Contact form, click Home  $\rightarrow$  New Contact (while in the People workspace):

	<del>ن</del> ک				
File	Home	Send / Recei	ve Fol	der View	Ş
2	*	s 📑	$\boldsymbol{\times}$	E 💽	1
New	Group New	Contact New	Delete	Meeting More	e
Contact	G	iroup Items	-	-	
1	New		Delete	Communicate	

(If you are not in the People workspace, click Home  $\rightarrow$  New Items  $\rightarrow$  Contact.)

The Contact form will open, and you will see a variety of different fields to add the details about the new contact.

	Untitled - Contact 🖸 - 🗆 X
Contact mater Contact text receives of t	Address Check     Business Picture Address Check     Image: Picture Business Picture Options     Image: Picture Up*     Categorize Follow Private Up*     Coom
Full Name       Company       Job title       File as	
Internet       Imite-mail     ▼       Display as	Notes
Web page address M address Bhona number	
Business     *       Home     *	
Business Fax  Mobile	
Addresses           Business         •           Image:	

Keep in mind that you do not need to fill out every field. Only the Full Name field is required to save the contact.

#### The Details Command on the Contact Form

There are even more fields in the Contact form that are available by clicking Contact  $\rightarrow$  Details:



With this command, the Details section will be displayed with additional fields that you can fill out:

_																	9388F				
	2	O									Unti	tled - Co	ntact						<b>E</b>		
File	Co	ntact	Insert	Form	at Text	Review	νQ	Tell me wha	it you w	vant to	do								i mana ang katala		
Save & Close	Delete	Save & New *	Forward	0neNote	General	Cert	iils ificates ields	Email Me	eting	More V	Address Book	€ Check Names	Business Picture Card •	Categori	ze Follow Up ~	Private	Zoom				
		Action				Show		Comn	nunicate	e	Nai	nes	Options		Tags		Zoom				^
Departm	ent						Manag	er s name													
Office							Assista	nt's name													
Professio	on [																				
Nicknam	e						Spouse	/Partner													
Title						٠	Birthda	iy	None			•									
Suffix						٣	Annive	rsary	None			a									
Internet	Free-Bu	sy																			
Address																					

Click the General command on the Contact tab to return to the normal view. If you need to edit the contact later, just double-click it from the People workspace. A condensed version of the Contact form will appear:

	Name Darryl Durkin	×
CONTACT   NOTES		
🕀 Email Email	Changes Saved To Outlook (Contacts)	
dar.durki@example.o	•Work	
Phone     Work	Company Metaldyne Corporation	
(555) 422-3942	⊕ Address	
(+)IM	⊕ Birthday	
	<u>S</u> ave Cancel	

Simply make your changes and click Save (which will become available once the contact is edited).

## LINKING CONTACT NOTES TO A CONTACT

Contact notes can be generated in Microsoft OneNote automatically. They will include basic information about a contact, such as their name, contact information, and details. If you would like to create and link a page of notes to a specific contact in the People workspace, select the contact and click Home  $\rightarrow$  OneNote:

	⇒ =					Cont	acts - jsmith@a	cmewidgets.on	microsoft.c	om - Ou	ıtlook			
File	Home Send / Receive	e Fol	der View	♀ Tell me what	t you want to do									
New Contact	Group New Contact New Group Items *	X Delete	Meeting More	People	Business C	Sard	<b>N</b> Phone	List +	Move	Mail Merge	OneNote	Forward Contact -	Share Contacts	Open Shared Contacts
	New	Delete	Communicate			Current Vie	w			Action	s ha		Share	

If you have the contact open in the Contact window, click Contact  $\rightarrow$  OneNote:



In either case, the Select Location dialog box will be displayed. Here, you can choose the notebook and section in which you want the contact notes to be placed:

Select Location in OneNote	×
Pick a section in which to put the	e contact notes:
	م
Recent picks	
Quick Notes	(Quick Notes)
All Notebooks	
My Notebook	
🗆 📃 Meeting Notes	
New Section 1	
Always send contacts notes t in OneNote Options).	othe selected location (customizable later
	OK Cancel

Once you click OK, the contact notes will be created and displayed in Microsoft OneNote:

e	•5 ∓						Smith, Jane - OneNote		•	? 📧 —	o x
File	Home	Insert	Draw	History	Review	View					John Smith
6	Meeting N	lotes 🗸	New	Section 1	+					Search (Ctrl+E)	• م
									2	🕂 Add Page	
	Smith, J	ane									
	Friday, Octobe	r 9, 2015	6:34 A	M						Smith, Jane	
[	Contact	Smith, J	ane								
	Business Phone	ABC Widg	ets Inc.								
	E-mail	abcwidg	ets@out	look.com							
	Link to Outlo	<u>ok item</u>									
	Notes										

These notes will now be linked to the contact, so they will be updated if the details of the contact change. Additionally, they can be accessed directly by clicking the OneNote command in either the People workspace or with the Contacts window open.

## TAGGING CONTACTS

Like other Outlook objects, you can tag contacts to help group them together and keep yourself organized. You can find all the tagging options within the Tags group of the Home tab while the People workspace is displayed:



Let's break down each option:

- **Categorize**: This drop-down command will allow you to categorize a selected or open contact. These categories can then be customized.
- Follow Up: In the same way as when used for messages, the follow-up flag reminds you to follow up with a contact by a specified deadline (today, tomorrow, this week, next week, etc.).
- **Private**: By tagging a contact as private, you can hide the details of this contact from anyone who is able to view your contacts list.

## **SECONDARY ADDRESS BOOKS**

Any contacts that you add to Outlook 2016 will automatically be added to the default address book. However, you do have the option to create multiple address books. For example, you could use your default address book for internal contacts and a secondary address book for external ones.

## **IMPORTING CONTACTS**

If you are switching to Outlook 2016 from another mail client or have contacts stored in another application, you can import them. However, they must be in a compatible file format, such as the Microsoft Excel Worksheet (.xls) or Comma Separated Value (.csv) file types.

To begin this process, open the People workspace. Then, click File  $\rightarrow$  Open & Export  $\rightarrow$  Import/Export:



You will then be prompted to choose the type of file you are importing and Outlook will walk you through the process:

Import and Export Wizard	1
	Choose an action to perform:
R	Export RSS Feeds to an OPML file Export to a file
	Import a VCARD file (.vcf) Import an iCalendar (.ics) or vCalendar file (.vcs)
	Import from another program or file Import RSS Feeds from an OPML file
	Import RSS Feeds from the Common Feed List
	Description
	Import data from other files, such as Outlook data files (.PST) and text files.
	- Back Next > Cancel
	Cancer Vext > Cancer

Note that you can also import contact information that is stored in vCard (.vcf) format by simply double-clicking on the vCard file while Outlook 2016 is open and clicking Home  $\rightarrow$  Save & Close.

## **FORWARDING CONTACTS**

If you would like to send one of your contacts to another person so that they can add it to their own list of contacts, you can forward it. To do this, click to select the contact in question and then click Home  $\rightarrow$  Forward Contact:

Ē	<del>్ •</del>							Con	tacts - jsmith@a	cmewidgets.c	onmicrosoft.	:om - 0	utlook			
File	Home Se	nd / Receive	Fold	der Vie	ew (	Tell me what	t you want to do									
New Contact	Group New Conta	ect New	X Delete	Meeting	More	People	Business C	Said Card	<b>N</b> Phone	List	Move	Mail	OneNote	Forward	Share Contacts	Open Shared
	New		Delete	Commu	nicate			Current Vie	2W			Action	15	- As a	Business	Card
														🔒 As a	n Outlool	Contact

This drop-down command will give you two different forwarding options to choose from:

- As Business Card: Clicking this option will open a new message form with the selected contact attached as a business card. The business card will also be displayed directly in the body of the message.
- As an Outlook Contact: Clicking this option will open a new message form with the selected contact attached as an Outlook contact.

## **DELETING CONTACTS**

To delete a contact from the People workspace, select the contact in question and then click Home  $\rightarrow$  Delete:



Alternatively, you can right-click the listing for a contact in the working area and then click the Delete option:



The selected contact will then be moved to the Deleted Items folder.

## ACTIVITY 6-1 Creating and Updating Contacts

Now that you are using Outlook 2016 more and more in your workflow, you would like to take advantage of its powerful contact management features. To start, you need to add and update a few contacts.

1. To begin, open Outlook 2016:



2. Display the People workspace by clicking the People button in the Navigation pane:



**3.** The People workspace will now be displayed. If you have any existing contacts, they will be listed here:

聞 5 +	Contacts - jsmith-Øscmewidgets.onmicrosoft.com - Outlook 🖸 - 🖸	x i
File Home Send / Receive	Folder View 🖉 Tell me what you want to do	
New Group New Contact New Contact New New Contact New	Main         Control         C	^
My Contacts Stype for Business Contacts Contacts	Essen Contacts (201-2)	Edit
	CONTRCT HOTES Calendar Calendar Calendar View Source Calendar Cale	
⊠ ≣ 🎂 🖾 …	80	
Items: 1	All folders are up to date. Connected to: Microsoft Exchange 🔲 💵 – – – – –	100%

**4.** Start creating a new contact by clicking Home  $\rightarrow$  New Contact:



5. The Contact form will now be displayed in its own window:

<b>₽</b> 5 3 ↑ ↓	÷	Untitled - Contact		ॼ – □ ×
File Contact Insert Form	nat Text Review 👰 Tell me what you want to	do	and the second second second second	
Save & Delete Save & Forward OneNote Close New - Address	Certificates     General     All Fields     Communicate	Address Check Book Names Names	tegorize Follow Private Up *	
Actions	Show Communicate	- Names Options	lags 200m	
Full Name				
Company				
Job title				
File as	· ·			
Fill F-mail.				
Display as		Notes		
Web page address				
IM address				
Phone numbers				
Business +				
Home ×				
Business Fax				
Markets.				
Addresses				
Business +				
This is the mailing address	Map it			

6. For this example, type "Darryl Durkin" into the Full Name field:



7. In the Company field, type "Metaldyne Corporation:"



8. Inside the E-mail field of the Internet section, type "dar.durki@example.org:"

H		5							
File	2	Cont	act	Insert	Form	at Text	Review	Q	Tell me what you want to o
Save 8 Close	Bu De	lete Sa N	ve & F ew •	orward O	neNote	<b>e</b> nera	Certifica Certifica All Field Show	ites s	Email Meeting More
F	- ull Na	ame		Darry	Durkin				
Company		Metal	Metaldyne Corporation						
Jo	Job title								
Fi	le as			Durki	Durkin, Darryl 👻				
Intern	net								
	E-1	mail	-	dar.du	ırki@exar	mple.org			
Di	isplay	as							
Web page address									
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9. Inside the Business field of the "Phone numbers" section, type "(555) 422-3942:"

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Ŀ	- •	<b>)</b>										Darryl	Durkin - C
F	ile	Contact		nsert	Form	at Text	Review	Ŷ	Tell me	what you	want to	do	
Save Clo	e & Dele	te Save New Acti	& For	ward O	neNote	Genera	Details Certificat	tes	Email	Meeting	More te	Addres Book Na	s Check Names
	Full Nan	1e	1	Darryl	Durkin							1	
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	E-ma	il	-	dar.du	rki@exan	nple.org						]	
	Display a	5		Darryl	Durkin (	dar.durki	i@example.org	)				Notes	
	Web pag	e addres	s									1	
	IM addre	55										]	
Pho	ne numb	ers										_	
	Busines	5	-	<u>(555)</u> 4	22-3942								
	Home		-									]	
	Busines	s Fax	-									]	
	Mobile.		-									]	

**10.** Examine the preview of the contact card that appears near the top right-hand corner of the Contact form. You will see that it has been populated with the information that you have entered:

🗄 🌜 👌	↑ ↓ =	Darryl Durkin - Contact	⊞ – □ ×
File Contact	nsert 🛛 Format Text 🛛 Review 🛛 🖉 Tell me what you want to	o do	
Save & Delete Save & For Close New * Actions	All Fields Show	Address Check Business Picture Names Options Cardons Data Picture Cardons Composition Tags Zoom Tags Zoom	
Full Name Company Job title File as Internet	Darryl Durkin Metaldyne Corporation Durkin, Darryl der.derkinBesamle.org	Daryf Durkin Metalogne Corporation dar durkil@example.org	
Display as	Darryl Durkin (dar.durki@example.org)	Notes	
Web page address IM address Phone numbers Business • Home • Business Fax • Addresses Business •	555.422.3843 		
This is the mailing address	Map R		

**11.** Click Contact  $\rightarrow$  Save & Close:



**12.** Returning to the People workspace, you will see a listing for the contact that you just entered in the working area:

留 ち +				
File Home Send / Receive Folder	View 🛛 🖓 Tell me what you want to do			
New Group New Contact New Contact New Delete M	Aeeting More People Business C Can	Move North	Ail OneNote lerge clons Contact + Contacts Share Contacts Share	Search People Categorize Follow Private Up - Taos Find
tive Drifts of Supper for Business Centrals 1 29 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6	Contacti (Unite )	diver A	Darr	log: Ind A
■ <b>55</b> 12 ··· (1)			All folders are up to date. Connected to: Microso	ft Exchange

**13.** Next, you need to import a contact that was sent to you using the vCard format. Open your Exercise Files folder and double-click the Activity 6-1.vcf file:



**14.** Windows may display a pop-up dialog in which you can choose which application you want to use to open this file. Ensure that Outlook 2016 is selected and then click OK:

How	How do you want to open this file?				
Keep	using this app				
0	Outlook 2016				
Othe	r options				
*	People New				
A	Windows Contacts				
â	Look for an app in the Store				
More	More apps 🗸				
Always use this app to open .vcf files					
	ок 🕞				

**15.** The contact will now appear in a separate Contact form. Click Home  $\rightarrow$  Save & Close:



**16.** The contact will now appear with the other contact(s) in the working area of the People workspace:



**17.** You realize that the e-mail address for the contact that you just imported is out of date. Double-click on the listing for Maryann Salzman:



**18.** A pop-up will display the details of this contact. Replace the content in the Email field with "m.salzman@example.org:"

Name Maryann Salzma	n
CONTACT NOTES ① Email Email	Changes Saved To Outlook (Contacts)
	Work     Title     Electronics Engineer     Company     XYZ Heavy Industries
€IM	⊕ Address ⊕ Birthday
	<u>S</u> ave Cancel

**19.** Click the Save button:



**20.** The new e-mail address will now have been added to the contact. Click the Close button in the upper right-hand corner of this pop-up:

	Maryann Salzman	-	XX
	Electronics Engineer, XYZ Heavy Industries	Edit	•••
CONTACT NOTES			
Calendar Schedule a meeting	View Source Outlook (Contacts)		
Send Email	Link Contacts		
Work (240) 850-9372	Company XYZ Heavy Industries		

**21.** Close Microsoft Outlook 2016.

# TOPIC B: View and Organize Contacts

As the number of contacts that you store in Outlook 2016 grows, so does the importance of being able to view and organize them. By knowing how to change the layout of the People workspace, you will be able to find the contacts that you are looking for in a more efficient manner. Over the course of this topic, you will learn all about viewing and organizing contacts in the People workspace.

#### **Topic Objectives**

In this topic, you will learn:

- About electronic business cards
- About contact views
- About the People pane
- How to use the Find tool
- About print styles for contacts

## **ELECTRONIC BUSINESS CARDS**

Electronic business cards can be used with Outlook 2016 to easily share contact information with others. Much like their physical counterparts, they include all the contact information that has been added to them. Additionally, the design of an electronic business card is fully customizable so you can add elements such as logos and backgrounds.

You can create your own electronic business card using Outlook 2016 and share it with anyone else by attaching it to an e-mail message. You even have the option to include your electronic business card in the signature line of your e-mail messages so that everyone you communicate with will instantly have access to it.

## **CONTACT VIEWS**

There are several different views that you can use to change how contacts are displayed in the People workspace. You can find all these options inside the Current View group of the Home tab:



By default, the People workspace uses the People view. This will list all your contacts in the working area, while the details will be displayed in the Reading pane:

ि <b>5</b> ∓	Contacts - jsmith@acme	ewidgets.onmicrosoft.com - Outlook		🖬 – 🗆 X
File Home Send / Receive Folder View	Q Tell me what you want to do			
New Group New Contact Croup Items Vew Delete Communicate	People Business Card Phone Current View	List v Mail OneNote Actions	Forward Share Open Shared Contact - Contacts Share Ta	Search People
New Diffe Communicate Wy Contacts Stype for Business Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts C	Correct View I+0 P resSmith CONTACT NOT Calendar Send Email sbox/dgstb@cutc Work ABC: Wrdgsts Inc.	Jane Smith Control Control Co	Share to View Source Outlook (Contacts) Outlook (Contacts) Unlook (Stype for Business Contac Link Contacts	si   Find   A
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		All folders are up to d	late. Connected to: Microsoft Exchange	<b>BB +</b> 100%

The **Business Card** view will display each contact as a small business card. Each business card will display varying degrees of information about the contact, but they will typically include at least the contact name and some contact information:

File Home Send / Receive	Contacts - jumith@acmewidgets.comicrosoft.com - Outlook 10 - 0 X Folder View Q Tell me what you want to do
New Group New Contact New Contact New Items*	Communicate       Comment/Contents       Contents       Contents       Contents       Contents       Contents       Find         Deterte       Communicate       Contents       Contents       Share       Open Shared       Categories       Find       Address Book
A My Contacts Contacts Stype for Business Contacts Contacts	Search Contacts (Cht-C) Search Contacts (Cht-C) Jane Smith Abrowlight Goutlook.com d f
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	р 9 9 1 1 5 5 1 1 4
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The **Card** view is like the Business Card view; however, it displays smaller cards for each contact in descending alphabetical order by last name. If you select a contact while in this view, you will see the details of the contact displayed in the Reading pane:

「語」う ・	Contacts - jsmith@acmewidgets.onmicrosoft.com - Outlook 🔳 - 🗆 🗙
File Home Send / Receive	Folder View Q Tell me what you want to do
New Group New Contact Group Items*	Image: Control Contro Control Control Control Control Control Control Control Control C
New D	elete Communicate Current View Actions Share Tags Find
▲ My Contacts	Search Contacts (Ctri+E)
Skype for Business Contacts	123 Smith Jane
Contacts	a Full Name: Jan b Busines: ABC
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The **Phone** view will list your contacts in ascending order by their last name with their business phone number as the primary point of contact:

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File Home Send / Receive		Ľ
New Group New Contact New Group Items	Note:     Image: Sector Property Sec	
New	l perce l'ommunicate i d'unrent view actions i sinare i lags i mini i	-
▲ My Contacts	Search Contacts (Ltri-E)	
Skype for Business Contacts	LI (# FULL NAME COMPANY FILE AS COUNTRY/REGION BUSINESS PHONE BUSINESS FAX HOME PHONE MOBILE PHONE E-MAIL JOURI	
Contacts		
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Finally, the **List** view will display your contacts as a list and group common contacts together. For example, if you have two or more contacts that work for the same company, they will be grouped together. Like the other views, contacts are sorted by last name in ascending alphabetical order:

「蜀 ち ・		Contacts - jsmith@acmewidgets.onmicrosoft.com - Outlo		
File Home Send / Receiv				
New Group New Contact New Group Items *	Delete Email Meering More People Business	Card Phone List T	tail OneNote rege Contact= Contacts Co	Search People
New	Communicate	Current View AC	tions share lags	Hind
▲ My Contacts	Dia la la companya di secondaria	Sei	arch Contacts (Ctrl+E)	<b>پ</b>
Skype for Business Contacts	Click here to add a new	FILE AS COUNTRY/REGION	DEPARTMENT   BUSINESS PHONE   BUSINESS FAX   HOME PHO	DNE   MOBILE PHONE   E-MAIL
Contacts	4. Company: Joonal: 1 Hamiri			
	41 Jane Smith	Smith. Jane	ABC Widgets Inc.	(555) 555-1234 abcwidget
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	[4]			

#### Sort Options

All the contact views sort contacts by last name in ascending alphabetical order. To change this order in the Phone or List views, you can use the commands in the Arrangement group of the View tab:



Clicking the **Reverse Sort** command will reverse whichever sort (ascending or descending) is currently applied to the opposite sorting order. Additionally, if you are using either the Phone or List views, you can choose to arrange your contacts by categories, company, or location.

If you would like more control over how contacts are sorted, you can use the Sort dialog box. This dialog box is opened by clicking View  $\rightarrow$  View Settings:



Once the Advanced View Settings dialog box is displayed, click the Sort button:

Advanced View Settings: Pho	ne X
Description	
Columns	Icon, Attachment, Full Name, Company, File As, Country/
Group By	None
Sort	File As (ascending)
Filter	Off
Other Settings	Fonts and other Table View settings
Conditional Formatting	User defined fonts on each message
Format Columns	Specify the display formats for each field
Reset Current View	OK Cancel

In the Sort dialog box, you can then choose how you primarily want items sorted, followed by three subsequent sort options:

Sort items by			ОК
File As	🗸 💿 As	cending	
		escending	Cancel
Then by			Clear All
(none)	🗸 🔍 As	cending	
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Then by			
(none)	🔍 🔍 As	cending	
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Then by			
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elect available fields from:			

## THE PEOPLE PANE

The People pane is intended to help you keep track of your contacts and your previous interactions with them. While it is minimized by default, the People pane can be expanded to dominate the lower half of the Reading pane in Outlook 2016:

器 う *		Inbox - jsmith@scmewidgets.onmicrosoft.com - Outlook	×
File Home Send / Receive	Folder View 🖓 Tell me what you want to do		
Change View Reset View - Settings View Current View Messa	nversations n Settings - Message Flag: Start Date Flag: Dye Date Preview Flag: Start Date Flag: Dye Date	Ga to     III access sort       III goes     Sadget       III goes     Sadget       III goes     Sadget   Provide Provide Over the Window Wind	~
∡ Favorites <	Search Current Mailbox (Ctrl 🔎 Current Mailbox 👻	O Reply (O Reply All O Forward	
Inbox 4 Clutter Sent Items Drafts	All Unread By Date * Newest 4 4 Yesterday John Smith B Documents Thu 2:13 PM Hey John, Here are the	John Smith - abcvidgets@outlook.com> John Swith     John Swith - abcvidgets@outlook.com>     John Swith - abcvidge	РМ <b>&gt;</b>
4 jsmith@acmewidgets.onmic Inbox 4	John Smith Joe's Retirement Hey all, Joe is going to be	Hey John,	
Drafts	4 Wednesday	Here are the documents that you requested for review.	
Deleted Items 2	John Smith Requested Documents Wed 12:39 PM	Thanks,	
Clutter	4 Last Week	Joe	
Junk Email Outbox	Microsoft Online Servic Your Velsoft password has bee Tue 9/29 Password reset notification		
RSS Feeds	▲ Older		
<ul> <li>Search Folders</li> <li>Groups</li> </ul>	OneNote Team Veloce 7/31/2015 Get OneNote for free on all your		
	<u>Click here to view more on Microsoft Exchange</u>	Jane Smith Qipe's Reirement 20 Population	× ×
		ALL Construction of the second	
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The People pane will include a picture of the contact (if one is available), as well as any recent email conversations, upcoming calendar items, and more. You can change it to its minimized state by the clicking the Minimized option or expand it by clicking the Normal option. To disable it entirely, click View  $\rightarrow$  People Pane  $\rightarrow$  Off:

Ē	5	÷						Inbox - jsmith@a	cmewidgets.onmicro	soft.com - Outlook				
File	Hor		Send / Receive	Folder	View	🖗 Tell me what you								
Change View *	View Settings	Reset View	Conversati	onversations on Settings -	Message Preview *	^{III} <u>D</u> ate ► Flag: Start Date	Erom Flag: Due Date	⊊ <mark>a</mark> Io I⊟ Size	Catggories		Folder Reading	To-Do Bar *	People Pane *	eminder Window
c	urrent Vie	w	Messi	ages				Arrangement			Layout		PE NO	mal
													<u>M</u> ir ✓ <u>O</u> ff	nimized

## THE SEARCH PEOPLE TOOL

If you have a lot of contacts in Outlook 2016, the Search People tool will become invaluable. It allows you to search through all your contacts to find the exact contact that you need. To use this tool, click inside the "Search People" field on the Home tab and then type your search terms:



The results from your search will immediately be listed in a drop-down menu just below the text box. Click on the result that you would like to open and work with.

#### Search Terms

Note that when you are using the Find tool, Outlook will only search through contact names (first, last, and partial); Display As names; e-mail addresses; and company names.

## **CONTACTS PRINT STYLES**

Occasionally you may find the need to print your contacts so that you have a physical reference. There are several different styles that you can choose from that each have a varying degree of information. You can find all these styles by clicking File  $\rightarrow$  Print while in the People workspace:



The print styles can be found inside the Settings section:

¢	Contacts - jamith@acmewidgets.com - Outlook ? - 🗆 X
Info Open & Export Save A: Save Arachement Print Options Frendback Exit	Print     Printer        Printer
	▲ Do Norm 1 = =================================

Below is a breakdown of what you can expect from each print style:

- Card Style: Choosing this option will print each contact as a business card with contact information. Like the Card view, contacts are listed in alphabetical order (ascending or descending).
- Small Booklet Style: This style will print out each contact on the page in such a way that it can be folded into a small booklet. Each contact includes their name and basic contact information. Like the other styles, contacts are sorted in alphabetical order (ascending or descending).
- Medium Booklet Style: Like the previous style, the Medium Booklet Style will print out contacts on a page so that they can be folded into a medium-sized booklet. Contacts are sorted in alphabetical order (ascending or descending).
- Memo Style: Choosing this style will only print out the information for one contact. It
  includes all the contact information in a memo-like fashion. To choose which contact you
  would like to print using this style, you must first select the contact in question before
  clicking File → Print.
- Phone Directory Style: Printing your contacts using this style will have them appear as if they were listings in a phone book. Only the names of your contacts and their phone numbers will be printed. Contacts that are printed in this style are sorted in alphabetical order.
- **Table Style:** This style is the only available contact print style that you can select when you are using the Phone or List contact views. It will print all your contacts in a tabular fashion, much the same way as they are displayed when using either of those views.

## **ACTIVITY 6-2**

## **View and Organize Contacts**

Now that you have added some contacts to Outlook 2016, you would like to see what different kinds of views are available in the People workspace. Additionally, you would like to print one of your contacts for reference. Students should complete Activity 6-1 before beginning this activity. A printer is also required for this activity.

1. To begin, open Outlook 2016:

- 19 ち ÷		Inbox - jsmith@acmewidgets.onmicrosoft.com - Outlook	a - a x
File Home Send / Receive	Folder View 🖓 Tell me what you want to do		
New New Email News - New Delete	Reply Reply All Forward Report	Control Nerver     Control	~
✓ Favorites	Search Current Mailbox ( 🔎 Current Mailbox 🔹	C Reply Reply All C Forward	
Inbox 4 Clutter Sent Items Drafts	All Unread By Date * Newest 4 * Tomorrow John Smith 61 0(2)2015 1:37 PM Hey BL, Det Spring to be	John Smith <abcuidgets@outlook.com> axin sweit Joe's Retirement</abcuidgets@outlook.com>	B 1 10/2/2015
✓ ismith@acmewidgets.onmicr	4 Last Week	Action Items	
Inbox 4 Drafts	msftconn@microsoft Program Closing - Office 20 Mon 9/21		
Sent Items Deleted Items 3	4 Older	Joe is going to be retiring soon, so I thought we could throw a small celebration. Please let me know your avai	ilability for next week.
Clutter Conversation History	UnerNote Leam P Welcome to OneNote 7/31/2015 Get OneNote for free on all	Thanks,	
Junk Email Outbox	There are more items in this folder on the server Click here to view more on Microsoft Exchange	John	
> Search Folders			
) Groups			
🖄 🕹 📰 🔽			

**2.** Display the People workspace by clicking the People button in the Navigation pane:



**3.** By default the People contact view will be applied, so you will see each contact listed in the working area with the details shown in the Reading pane:



**4.** Apply the Business Card contact view by clicking Home  $\rightarrow$  Business Card:

												Con	tacts - jsmith@a	cmewidget	s.onmi
	File	Ho	me	Send	/ Receive	Fold	der Vi	ew	õ	Tell me what	you want to do.				
		**		<b>\$</b>		$\mathbf{X}$		<b>(</b>			2	8	٨.		*
(	Contact	Group	Gr	oup	Items *	Delete	ivieeting	viore	l	People	Business	Card	Phone	List	Ŧ
			New			Delete	Commu	nicate				Current View	w		

5. You will now see your contacts displayed as a collection of business cards:

昭 5 平	Folder View Q Tell me what you want to do	Contacts - jsmith@acmewidgets.onmicrosoft.com - C	Dutlook 🗉 – 🗆 X
New Group New Contact New Contact New New	Delete Communicate	Card Phone List T	Image         Image <th< td=""></th<>
4 My Contacts			Search Contacts (Ctri+E)
Skype for Business Contacts	123 Doe, John S	inith, Jane	
Contacts	a John Des b Alex Waget Inc. Sale Austorie a aboutgets Boutook.com	Jane Smith 265 USGAL In: Movie (058) 955-123 Materia above dget (Bouldook.com	
	p		
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	4		
🔺 🖬 🐸 😳 ···	40		
items: 2			All folders are up to date. Connected to: Microsoft Exchange 🔲 🖤 - 🛶 + 100%

**6.** Apply the Card contact view by clicking Home  $\rightarrow$  Card:



7. You will see that this view displays small cards for each contact. The details of the selected contact will be displayed in the Reading pane at the bottom of the workspace:

- 昭 - 5 - +			📼 – 🗖 🗙
	Folder New 🗘 Tell me what you want to do		
Charge View View * Settings View Current View	legenie ∰ Company = 1 I Breeze Set station = 1 ← Eppand/Colleger = 1 ← Pane* Bart Amongement Legenie ← People	Reminder Open in New Class Window Window Alt Rems	^
<ul> <li>My Contacts</li> </ul>		Search Contacts (Ctrl+E)	
Skype for Business Contacts	123 Doe, John		
Contacts	a-c Full Name Joh Job Title: Sale		
	Company: ABC		
	B B		
	In Full Name Jan.		
	no Business: ABC Mohlar 255		
	Pr Email abc.		
	rt .		
	UV		
	74		
	<b>a</b> B		
	a una		
	Full Rank	John Doe ADC Widgets Inc.	
	Company Abc Waget Inc.	Sales Associate	
	Ion one Salet Attocate	abrwidgets@outlook.com	
	File as Doe, John -		
	E-mail. • ekceridasta@outlook.com		
	Display as John Doe (abox/dgats@outlook.com)	Notes	
	Web page address		
	IM address		
	Phone numbers		
	Business v		
	Home		
⊠ ≕ ≱ ⊡ …	Business Pax v		
Heres: 2		All folders are up to date. Connected to: Microsoft Exchange	□ 00 - 1 + 125

(If the Reading pane is not displayed, click View  $\rightarrow$  Reading Pane  $\rightarrow$  Bottom.)

**8.** Click Home  $\rightarrow$  Phone to apply the Phone contact view:

	5	÷									Contacts - js	mith@acmewic	lgets.onmic	rosoft.
File	Ho	me	Send	/ Receive	Fold	ler '	View	♀ Tell n	ne what you wa	int to do				
New	Koroup	New	Sontact	New	X Delete	Email	Meeting	More	People	Business	<mark>≧≣</mark> Card	Phone	List	4
Contact		New	oup	items ·	Delete	с	ommunica	ite			Current Viev	v		

(If you do not see this view, click the down arrow in the Current View gallery to access it.)

**9.** With the Phone contact view applied, you will see that each contact is displayed in a list form with the telephone information displayed prominently:

- 語 ち ÷	Contacts - jsmith@acmewidgets.com/crosoft.com - Outlook 🗖 - 🗆 🗙
File Home Send / Receive	Folder View 🗘 Tell me what you want to do
New Group New Contact New Contact Group Items -	Image: Specific field binding         Im
New	Delete Communicate Current View Actions Share Tags Find A
▲ My Contacts	Search Centrads (Ctri-E)
skype for business contacts	Click here to add a new
	Imm Die ALC Wagen Inc. Des, Min     Aussigen Deutlicht zum
25 m 25 D ····	

#### **10.** Click Home $\rightarrow$ List:



(If you do not see this view, click the down arrow in the Current View gallery to access it.)

**11.** You will see that each contact will be listed and grouped according to company information:

on an		Contacts - jsmith@acmewidgets.onmicrosoft.com - Outlook		⊞ – ⊡ ×
File Home Send / Receive	Folder View Q Tell me what you want to do			Search Records
🐸 🥸 🍱 🔛	📉 🖬 🐨 🚨 🔊	🚨 📞 🔲 🗄 🎽 鵍		Address Book
Contact Group Items *	People Business	Card Phone List = Move Mai O - Merge	Contact - Contacts Contacts - Up -	ivate
New	lelete Communicate	Current View Actions	Share Tags	Find A
✓ My Contacts		Search Co	ontacts (Ctrl+E)	م
Skype for Business Contacts	DIG FULL NAME JOB TITLE COMPANY	▲  FILE AS ▲  COUNTRY/REGION  D	EPARTMENT   BUSINESS PHONE   BUSINESS FAX   HOME PHONE	MOBILE PHONE E-MAIL
Contacts	Click here to add a new			
	<ul> <li>Company: (none): 1 item(s)</li> </ul>			
	a: Jane Smith	Smith, Jane	ABC Widgets Inc.	(555) 555-1234 abcwidget
	<ul> <li>Company: ABC Widgets Inc.: 1 item(s)</li> </ul>			
	John Doe Sales Associa ABC Widgets	Inc. Doe, John		abcwidget
🔤 📰 🐸 😳 ···	R			
Items: 2		All folders	are up to date Connected for Microsoft Exchange	

**12.** Return to the People contact view by clicking Home  $\rightarrow$  People:

											Contacts - js	mith@acmew	idgets.onmic	rosoft.
File	Но	me	Send	/ Receive	Fold	ler '	√iew	♀ Tell n	ne what you war	nt to do				
2	***	2			$\boldsymbol{\times}$			<b>1</b>		8	2	٨.		
New Contact	Group	New C Gro	ontact oup	New Items *	Delete	Email	Meeting	More *	People	Business	Card	Phone	List	Ŧ
		New			Delete	C	ommunica	te			Current View	V		

(If you do not see this view, click the up arrow in the Current View gallery to access it.)

13. Click to select any one contact that you would like to print:



**14.** Click File  $\rightarrow$  Print:



**15.** With the Print category selected, you will see a preview of how the currently selected contact view will appear on the printed page. Within the Settings section, click the Memo Style:

( <del>~</del> )		Contacts - jsmith@acmewidg	ets.onmicrosoft.com - Outlook		7 – D X
Constant of the second	Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Print Pr	Catat: jmitiĝenomi	at convices and come - Outbook		7 - D X
		4 1 of 2 +	n šne i	10403(58.N.**	B 20 M

**16.** With the Memo Style applied, you will see the contents of the selected contact in the preview:

e	Contacts - jornith	Parmenidgets.ormicrosoft.com - Outbook	1
Control of the second s	Print Settings	Junior         um 100           Nationary         um 100           Nationary         um 100           Status         um 100	
Feelback Ex	Set Syste       Set Syste       Set Syste       Set Syste       Mattern Result Syste       Tem Syste       Barrow Construct Syste		
			Ph (20)

**17.** Ensure that the appropriate printer has been selected from the Printer drop-down command and then click the Print button:



18. The selected contact will now have been printed. Close Microsoft Outlook 2016.

## Summary

During this lesson you learned how to create and update contacts in Outlook 2016, as well as how to view and organize them. You should now feel comfortable creating new contacts from scratch, as well as using the various contact views that are available in the People workspace.

# LESSON 7: WORKING WITH TASKS AND NOTES

## **Lesson Objectives**

In this lesson you will learn how to:

- Create and manage tasks
- Manage notes

# **TOPIC A: Create Tasks**

Outlook 2016 not only provides a central place to keep your messages, calendar, and contacts organized; it also gives you the ability to schedule and manage tasks. For example, if you need to review a presentation by a specific date, you can create a task that will remind you to do just that. Over the course of this topic, you will learn all about tasks and how to create them.

#### **Topic Objectives**

In this topic, you will learn:

- About tasks
- About the Task form
- How to create recurring tasks
- About task views
- About server tasks
- How to set task options
- How to print tasks

## TASKS

**Tasks** are a type of Outlook item that are used to define and track an activity that you need to complete by a specific date and/or time. You can assign tasks to yourself or other contacts, while contacts are able to assign tasks to you. All tasks are managed using the Tasks workspace:

器 ち •		To-Do Li	st - jsmith@acmewidgets.onmicrosoft.	com - Outlook		🖾 – 🗆 🗙
File Home Send / Receive						
New New New Task Email Items - New Delete	Reply Forward The More - All Respond	Remove e from List age Task Remove P Today P Today P Tomorrow P Today	Next Week No Date Custom Up	List To-Do List Prioritized	Move OneNote Categorize Low Impo	stance Eind
٤	1			Search To Do Litt (Ctrl+D		0
▲ My Tasks	Distant constant	100100 0 100	000 000 000 00 00		laise Leiseener	1.W.Im
To-Do List	Click bere to add a new Task	START DATE	REMINDER IIME	DUE DATE	IN PO CATEGORIES	171 14
Tasks						
	Flag: Due Date: Next Week					
	Complete Assignment	Mon 10/5/2015	None	Fri 10/16/2015	Tasks	
S = 4 D						
				The Addition Western		
Filter applied				Updating Tasks.	Connected to: Microsoft Exchange	+ 1796

This workspace will list any tasks that have been assigned to you by yourself or others.

## **TASK FORM**

To create a task, you first need to open the Task form. This is done by clicking Home  $\rightarrow$  New Task while in the Tasks workspace:

	5	÷						
File	Ho	ome	Send / Re	eceive	Folde	er Vie	w ⊈Tel	h
~	_		X	9	Q	9	De Meeting	
New Task	New Email	New Items *	Delete	Reply	Reply All	Forward	🔲 More -	
63	New		Delete		1	Respond		

(If you are not in the Tasks workspace, click Home  $\rightarrow$  New Items  $\rightarrow$  Task.)

When open, the Task form will provide you with several fields to create a new task:



Here is an overview of these fields:

- Inside the **Subject** field you can enter a brief description of the task that you are adding.
- In the "Start date" and "Due date" fields, you can enter when you would like the task to begin and when you would like it to end.
- The Status drop-down menu allows you to specify the current stage the task is in (Not Started, In Progress, Completed, Waiting on someone else, or Deferred).
- The **Priority** drop-down menu is used to specify how important this task is (Low, Normal, or High).
- The **% Complete** increment box is used to specify the level of progress that has been achieved for the current task.
- The **reminder** controls are used to add a reminder to the task that you are creating.
- The **body** of the Task form can be used to add more specific information about a task.

## **CREATING RECURRING TASKS**

Like calendar appointments, you can make tasks reoccur at a selected interval. To do this, open a task and click Task  $\rightarrow$  Recurrence:

B	5	ð	Ŷ	ψ	÷					Untitled - Task		
File	Task	- h	nsert	Format Te	ext R	leview (	⊋ Tell n	ne what you v	vant to do			
Save & Close	Delete Fo	rward	OneNot	e Task	Details	Mark Complete	Assign Task	Send Status Report	Recurrence	Categorize Follow v Up v	<ul><li>Private</li><li>High Importance</li><li>Low Importance</li></ul>	Zoom
	Actio	ns		Sh	ow	- N	lanage '	Task	Recurrence		lags	Zoom

This action will display the Task Recurrence dialog box. Here, you can choose how often you want the task to reoccur, how long the recurrence should last, and when you want that recurrence to happen. Click OK when your options are set:

Task Recurrenc	2	Х
Recurrence pa Daily Weekly Monthly Yearly	ttern Recur every 1 week(s) on Sunday Monday Tuesday Wednesd Thursday Friday Saturday Regenerate new task 1 week(s) after each task is completed	ay I
Range of recu Start: Wed 1	0/7/2015   No end date	
	O End after: 10 occurrences	
	○ End by: Wed 12/9/2015 ∨	
	OK Cancel Remove Recurrence	

(Note the "Regenerate new task" radio button. Selecting this option will make the next task in a recurrence only happen if the previous task is marked as complete.)

You will then see the recurrence summary just below the ribbon in the Task form:

(The Skip Occurrence command will become available once you have applied recurrence to a task. This command allows you to skip the current occurrence of a recurring task.)

## **TASK VIEWS**

H										Untitle	d - Task			
File	Ta	sk	nsert	Format Te	ext R	eview (	2 Tell m	ne what you v	vant to do					
Save & Close	X Delete	Forward	I OneNote	Task	Details	Mark Complete	Assign Task	Send Status Report	Recurrence	Skip Occurrence	Categorize	Follow Up ▼	<ul> <li>Private</li> <li>High Importance</li> <li>Low Importance</li> </ul>	Zoom
	Ac	tions		Sh	ow	N	lanage T	ask	Recurr	ence		Ta	igs	Zoom
Due Due Subject	today. every V	Vednesd	ay effective	e 10/7/20	15.									
Start dat	e	None				Status	Not St	arted	*	]				
Due date	2	Wed	10/7/2015			Priority	Norma	I •	% Complete	0%	*			
Remi	nder	None				None		-	🕽 🗧 Owner	John Smi	th			

There are many different views that are used to change how tasks are displayed in the Tasks workspace. You can find all these different views inside the Current View group on the Home tab:

日	5 Ŧ					To-Do L	.ist - jsmith@a	acmewidgets.o	nmicrosoft.co	n - Outlook		
File	Home	Send / Receive	Folder View Q Tell	me what you want to	do							
New Task	New New Email Items * New	Delete Repl	Reply Forward More - All Respond	Mark Remove Complete from List Manage Task	<ul> <li>Today</li> <li>Tomorrow</li> <li>This Week</li> <li>Follow</li> </ul>	<ul> <li>Next Week</li> <li>No Date</li> <li>Custom</li> <li>W Up</li> </ul>	Detailed Today	Simple List	To-Do List Overdue	Prioritized	Active	Completed
							Manage Save Cu Apply C	e Views Irrent View As a Current View to	New View Other Task Fol	ders		

(We have clicked the More arrow to make the entire Current View gallery visible.)

By default the Tasks workspace will use the **To-Do List view**. This will display your tasks in the same way that they appear in the To-Do Bar, but it also includes the ability to arrange them by type, importance, start date, and more:

<b>R</b> 4 1				
198 - Y - F		To-Do List - jsmith@acmewidgets.onmicrosoft.com - Outlook		u ×
File Home Send / Receive	Folder View V Tell me what you want to do			
G 🕉 🗠 💽 🖡	Categories P Start Date P Due Date 1 Reverse Sort			
Change View Reset Message 📫	Folder Type I Importance Type	Folder Reading To-Do People Reminders Open in New Close		
View * Settings View Preview *	Arrangement	Pane * Pane * Bar * Pane * Window Window All Items		
<	French Te De Lieb (Old - D	a diana		
▲ My Tasks	James to Day Data	Complete Assignment		
To-Do List	Type a privitask Due date	Starts on 10/5/2015, due on 10/16/2015		
lasks	A De Mart Maak	Not Started Priority Normal % Complete 0%		
	Complete Assignment	Joun 2000		
🖾 📰 aš 🔯 ···				
Filter applied			All folders are up to date. Connected to: Microsoft Exchange	- + 102%
Lact appren			surroutes are up to outer connected to mitrosoft Extrange	000 op + 100%

(Note that the Reading pane has been displayed on the right.)

The **Detailed view** will list all tasks. Each entry will include the subject, status, due date, date modified, date completed, folder location, category information, and if the task was flagged for follow-up. You can sort the entries by clicking the column headers:

	كر
🗹 🗋 ! 🕼 TASK SUBJECT STATUS DUE DATE 🔺 MODIFIED DATE COM	IPLETED IN FOLDER CATEGORIES V
Click here to add a new Task	
Complete Assignment Not Started Fri 10/16/2015 Fri 10/9/ None	Tasks

Just as it sounds, the **Simple List view** will list all the tasks. Unlike the Detailed task view, this task view will only include the subject, due date, category, location, and follow-up flags for each task:

		Search To-B	Do List (Ctrl+E)		Q
TASK SUBJECT	DUE DATE	CATEG	GORIES	IN FOLDER	14
Click here to add a new Task					
🗟 🗌 Complete Assignment	Fri 10/16/2015			Tasks	•

The Prioritized view will list your tasks based on their priority:

					,	
			Search To-Do L	ist (Ctrl+E)		P
D	2 0  TASK SUBJECT	CREATED *	CATEGORIES	<b>A</b>	IN FOLDER	8
	Click here to add a new Task					
-4 Pr	ority: Normal: 1 item(s)					
	Categories: (none): 1 item(s)					
2	Complete Assignment	Fri 10/9/2015 9:15 AM			Tasks	►
a Pr	ority: High: 1 item(s)					
	Categories: (none): 1 item(s)					
2	Schedule Staff Meeting	Wed 10/7/2015 9:27 AM			Tasks	•

The **Active view** will only list tasks that are ongoing. Each task will include subject information, status, due date, percent complete, location, and category information:

			Search To-Do List	(Ctrl+E)	Q		
TASK SUBJECT	STATUS	DUE DATE	% COMPLETE	CATEGORIES	IN FOLDER	12	
Schedule Meeting	Not Started	Wed 10/7/2015	0%		Tasks	•	
Prepare for Presentation	Not Started	Fri 10/16/2015	0%	Blue category	Tasks	Þ	

The **Completed view** will display tasks that have been marked as completed. Each task will include the subject, due date, date completed, color category, and folder information:

			Search To-Do List (Ctrl+E)		P	
D I 0 TASK SUBJECT	DUE DATE	DATE COMPLETED	*	CATEGORIES	IN FOLDER	12
<ul> <li>Date Completed: October 7, 2015: 1 item(s)</li> </ul>						
Complete Assignment	Fri-10/16/2015	Wed-10/7/2015			Tasks	$\checkmark$

The **Today view** is used to display only tasks that are due for the current date. Each task includes the subject information, due date, category information, folder location, and follow-up flags:

		Search To-Do List (Ctrl+E)	Search To-Do List (Ctrl+E)	
TASK SUBJECT	DUE DATE	CATEGORIES	IN FOLDER	8
Click here to add a new Task				
🖄 🗌 Complete Assignment	Wed 10/7/2015		Tasks	►

The **Next 7 Days view** will display any tasks that are due within the next week. This view includes subject information, status, due date, percent complete, category information, location, and follow-up flags:



The **Overdue view** is used to display any tasks that are past their due date. This view includes subject information, status, due date, percent complete, category information, location, and follow-up flags:

					Search To-Do List (Ctrl+E)			P
D ! 0	TASK SUBJECT	STATUS	DUE DATE	<b>^</b>	% COMPLETE	CATEGORIES	IN FOLDER	17
2!	Schedule Staff Meeting	Not Started	Tue 10/6/2015	5	0%		Tasks	

Finally, the **Assigned view** will display any tasks that have been assigned to you by someone else. This view includes the subject information, owner (who assigned the task to you), due date, status, location, and follow-up flags.

### TASK OPTIONS

To configure many of the settings that control how tasks are created and displayed, you need to open the Outlook Options dialog box. To do this, click File  $\rightarrow$  Options:



With the Outlook Options dialog box displayed, click the Tasks category. You will see that this category includes two sections:

Outlook Options		?	×
General Mail Change the settings that track your tasks and to-do items.			
Calendar Task options			
Groups       Sgt reminders on tasks with due dates         People       Default reminder time: 8:00 AM        Image         Tasks       Image       Image       Image         Language       Qverdue task color:       Image       Image         Advanced       Completed task color:       Image       Image         Set Quick Click flag:       Quick Click flag:       Quick Click flag:       Image			
Customize Ribbon			
Add-ins Trust Center Task working hours per <u>week</u> : Add-ins Task working hours per <u>week</u> : Add-ins Task working hours per <u>week</u> :			
	ОК	Car	icel

The **"Task options"** section includes controls to customize how reminders are set, when status reports are sent, and task coloring options. The **"Work hours"** section is used to control the total work hours that you typically have in a day and over the average week.
### PRINT TASKS

To print tasks, open the Tasks workspace and then click File  $\rightarrow$  Print. With the Print category of Backstage view open, examine the Settings section. You will see that there are two print styles to choose from: Table Style and Memo Style.

¢	To-Do List - jandh@acmewidgets.covmicrosoft.com - Outlook	? — — X
© kelo Open & Expent Sere & Ar Pret Office Account Options Feedback Ext	Te de Let - jonth@ecreensidgets.com/count.com - Outlook	7 ~ G X
		8 8 0

**Table Style** will print a list of all the tasks that you have assigned to you. It will include information like the task subject, who it is assigned to, due dates, and other information. The **Memo Style** will print the currently selected task in a memo-like fashion. This style is great if you would like to print the information that you have about one task.

Once you have chosen a print style, ensure that the appropriate printer is selected via the Printer drop-down command. Next, click the Print command:



The data will then be sent to the printer and you will be returned to the Tasks workspace.

# ACTIVITY 7-1 Creating Tasks

You team has been assigned a new project. You would like to add a task to Outlook 2016 that has been delegated to you by the project manager. A printer is required to complete this activity.

1. To begin, open Outlook 2016:



2. Display the Tasks workspace by clicking the Tasks button in the Navigation pane:

	25	
Items: 10	Unread: 4	

**3.** The Tasks workspace will now be displayed:

8 b			-1-1-1-1-1				To-Do List -	jsmith@acmev	idgets.onmicn	osoft.com - Ou	rtlook						<b>m</b> –	o ×
File Horr	ne S	iend / Re	ceive	Folder View Q Tel	me what you want to	So	In Next Week					-	100		80.0	A Pointe	Search Pennie	
		X	14	Rents Second =	V 15	Tomorrow	IP No Date	iq		Y	1	~		I US		1 High Importance	Address Book	
Task Email Ite	ems *		napay	All	Complete from List	It This Week	P Custom	Detailed	Simple List	To-Do List	Prioritized	Active	*		Caregonize	↓ Low Importance		
new		Delete	<	Kespana	Manage lask	rene	wup			Current view	Saarch To Do Li	d (Chile D		Actions		legt	rina	0
▲ My lasks				DI TASK SUBJECT	STAR	I DATE		REMINDER	TIME		DUE DATE	*		INFO	CATEGORI	F5		1017
To-Do List				Click here to add a new Ta	sk													1 444
1865									We didn'	t find anything	to show here.							
	at [	Ø.																

**4.** Create a new task by clicking Home  $\rightarrow$  New Task:



5. The Task form will now be displayed. In the Subject field, type "Prepare for Presentation:"

<b>⊟</b> 5	¢ 1					Untitled - Task			
File Tas	k Insert F	ormat Text R	eview 🛛	Tell me what you v	/ant to do				
Save & Delete F Close	Forward OneNote	Task Details	Mark A Complete	ssign Send Status Task Report	O Recurrence	Categorize Follow v Up v	<ul><li>Private</li><li>High Importance</li><li>Low Importance</li></ul>	Zoom	
Act	ions	Show	Mar	nage Task	Recurrence	Tags Zoo			
Subject	Prepare for Presen	tation 🔶							
Start date	None		Status	Not Started	•				
Due date	None		Priority	Normal 👻	% Complete	0%			
Reminder	None		None	-	0wner	John Smith			

6. Click the "Start date" drop-down menu and choose next Friday:

	5	ð		Ϋ́		ψ		÷				Pre	pare for Presentatic	n - Task	
File	Tas	k I	nsert		For	mat ⁻	Text	R	eview	♀ Tell m	ne what you v	want to do			
Save & Close	Delete F	orward	One	Note	2	Task	: De	etails	Mark Complete	Assign Task Janage Ti	Send Status Report ask	Recurrence Recurrence	Categorize Follow v Up v	<ul> <li>Private</li> <li>High Importance</li> <li>↓ Low Importance</li> <li>Tags</li> </ul>	Zoom Zoom
Subject		Prepa	re for	Pres	enta	tion									
Start da	te	None							-	Not St	arted	*			
Due dat	te	•		Octo	ber	2015		×	Priority	Norma	<del>ب</del> ا	% Complete	0%		
🗌 Rem	inder	N SU	MO	TU	WE	TH	FR	SA	None		-	🕑 Owner	John Smith		
		4	- 20	29 6	50	8	2	5 10							
		11	12	13	14	15	16	17							
		18	19	20	21	22	23	³ 24							
		25	26	27	28	29	30	31							
			2 Tod	3 lay	4	N	6 one								

7. You will see that the "End date" drop-down menu will automatically update to the same date as the one that was entered into the "Start date" field:

				Pre	pare for Presentation - Task	
sk Insert Fo	ormat Text R	eview 🛛	Tell me what you w	vant to do		
Forward OneNote	Task Details	Mark A Complete	Assign Send Status Task Report	Recurrence	Categorize Follow Up + Low Importance	Zoom
tions	Show	Ma	nage Task	Recurrence	Tags	Zoom
/5.						
Prepare for Presen	tation					
Fri 10/16/2015	0	Status	Not Started	*		
Fri 10/16/2015	10	<b>4</b>	Normal 👻	% Complete	0%	
None	1101	None	- 4	0wner	John Smith	
	k Insert F Forward OneNote tions 5. Prepare for Preser Fri 10/16/2015 Fri 10/16/2015 None	k Insert Format Text R Forward OneNote 5. Prepare for Presentation Fri 10/16/2015	k Insert Format Text Review Q Forward OneNote Task Details Mark / Complete tions Show Ma 5. Prepare for Presentation Fri 10/16/2015 Status Fri 10/16/2015 Mone	k Insert Format Text Review Q Tell me what you v k Insert Format Text Review Q Tell me what you v Forward OneNote Task Details Task Details Complete Task Report Mark Assign Send Status Complete Task Report Manage Task 5. Prepare for Presentation Fri 10/16/2015 Status Not Started Fri 10/16/2015 Normal	Insert     Format Text     Review     Q Tell me what you want to do       Image: Task     Task     Details     Image: Task     Tell me what you want to do       Image: Task     Task     Details     Image: Task     Tell me what you want to do       Image: Task     Task     Details     Image: Task     Tell me what you want to do       Image: Task     Task     Details     Image: Task     Tell me what you want to do       Image: Task     Task     Details     Image: Task     Recurrence       Show     Show     Mark     Assign Send Status     Recurrence       Image: Task     Tell me what you want to do     Image: Task     Recurrence       Status     Tell me what you want to do     Image: Task     Recurrence       Tell 10/16/2015     Image: Task     Image: Task     Image: Task       Image: Task     Tell me what you want to do     Image: Task     Image: Task       Image: Task     Tell me what you want to do     Image: Task     Tell me what you want to do       Image: Task     Tell me what you want to do     Image: Task     Recurrence       Image: Task     Tell me what you want to do     Image: Task     Recurrence       Image: Task     Tell me what you want to do     Image: Task     Recurrence	Insert     Format Text     Review     Q Tell me what you want to do       Image: Show     Image: Show     Q Tell me what you want to do       Image: Show     Image: Show     Image: Show     Image: Show       Prepare for Presentation     Image: Show     Image: Show     Image: Show       Prepare for Presentation     Image: Show     Image: Show     Image: Show       Prepare for Presentation     Image: Show     Image: Show     Image: Show       Prepare for Presentation     Image: Show     Image: Show     Image: Show       Image: Show     Image: Show     Image: Show     Image: Show       Image: Show

8. Click the Priority drop-down menu and click High:

<b>⊟</b> 5	¢ 1	ψ =		Prepare for Presentation - Task											
File Tas	sk Insert F	ormat Text R	eview (	🖞 Tell me what you w	vant to do										
Save & Delete Close	Forward OneNote	Task Details	Mark Complete	Assign Send Status Task Report	Recurrence	Categorize Follow Up + Up + Low Importance	Zoom								
Ad	tions	Show	N	/lanage Task	Recurrence	Tags	Zoom								
🚹 Due in 9 day	/5.														
Subject	Prepare for Presen	itation													
Start date	Fri 10/16/2015		Status	Not Started	•										
Due date	Fri 10/16/2015		Priority	Normal 👻 🔹	<mark>◆ % Com</mark> plete	0%									
Reminder	None		None	Low Normal	🕅 Owner	John Smith									
				High											

**9.** You need to make this task reoccur on a weekly basis. Click Task  $\rightarrow$  Recurrence:

	5	¢ 1	ψ	÷				Pre	pare for Preser	ntation -	Task	
File	Task	Insert	Format Te	xt Re	eview (	2 Tell r	ne what you w	ant to do				
Save & Close	Delete For	ward OneNo	te Task	Details	Mark Complete	Assign Task	Send Status Report	Recurrence	Categorize F	ollow Up •	Private High Importance Low Importance	Zoom
	Action	s	Sh	ow	N	lanage '	Task	Recurrence	5	Tag	s	Zoom

**10.** The Task Recurrence dialog box will now be displayed. Ensure that the Weekly radio button is selected and the "Recur every" text box is set to 1:

Task Recurrence	2	×							
Recurrence pattern         Daily       Recur every       1       week(s) on         Weekly       Sunday       Monday       Tuesday       Wednesday         Monthly       Thursday       Friday       Saturday         Yearly       Regenerate new task       1       week(s) after each task is completed									
Range of recur Start: Fri 10/	rence 16/2015 End after: End by:	e 10 occurrences Fri 12/18/2015							
	OK Cancel	Remove Recurrence							

**11.** Click the "End after" radio button and enter "5" into the adjacent text box. Click OK:

Task Recurrence	e X
Recurrence pa Daily Weekly Monthly Yearly	Image: Recur every state       1       week(s) on         Image: Sunday state       Image: Monday state       Image: Wednesday state         Image: Thursday state       Image: State       Image: State         Image: Regenerate new task state       1       week(s) after each task is completed
Range of recu Start: Fri 10,	rrence (16/2015 No end date () End after: 5 occurrences
	OK Cancel Remove Recurrence

**12.** With the Task form now complete, click Task  $\rightarrow$  Save & Close:



**13.** Returning to the Tasks workspace, you will see the new task that you just created:

8	- 5							To-Do List - j	smith@acmex	vidgets.onmicro	soft.com - Ou	tlook						<b>.</b> –	o ×
File		lome			Folder View Q Tel														
New Task	New Email	New Rems *	Delet	Reply	Reply Forward More -	Mark Remove Complete from Lis	Today Tomorrow This Week	I ^{III} Next Week I ^{III} No Date I ^{III} Custom	Detailed	Simple List	To-Do List	Prioritized	<b>Active</b>	4 4	Move OneNote	Categorize	Private I High Importance Low Importance Tags	Search People	
				4	in gano	initiage task						• Search To-Do Lie	d (Chrl+E)						۵
4 M)	y lasks				Dimer subject	1574	PT DATE		DEMINITER	THEF		DUE DUTE			in p		160		1/0/172
To	-Do List				Click here to add a new Ta	sk													1 444   1
185	as				🔺 🎼 Flag: Due Date: Next	Week													
				_	Repare for Presentation	Fri	10/16/2015		None			Fri 10/16/20	15		Task				▶
			6																
_			-																

**14.** Apply the Prioritized task view by clicking Home  $\rightarrow$  Prioritized:

율		To-Do List - jsmith@acmewidgets.onmicrosoft.com - Outlook											
File	Home	Send / Receive Folder View Q T	ell me what you want to	do									
New Task	New New	Delete Reply Reply Forward I More	Mark Remove	Today  Tomorrow  No Date  This Week  Custom	Detailed Simple List	To-Do List Prioritized	Active						
	New	Delete Respond	Manage Task	Follow Up		Current View							

(You may need to expand the Current View gallery to see this view.)

**15.** With the Prioritized task view applied, you will see the task that you just created in the Priority, High group. Click to select this task:

園 ち ・														
File Home Send / Receive	Folder View Q Tell													
New New New Delete Reply	Reply Forward B More -	Mark Remove	P Today I [™] Tomorrow I [™] Tomorrow I [™] This Week I [™] Custom	Detailed	I Simple List	To-Do List	<b>?</b> Prioritized	Active	1	Move OneNote	Categorize	Private     High Importance     Low Importance	Search People	
New Delete	Respond	Manage Task	Follow Up			Current Vie	w			Actions		Tags	Find	^
4 My Tasks							Search To-Do Lin	it (Ctrl+E)						P
To-Do List	DI 2 0 TASK SUBJECT	The second s		CREATED	•		CATEGORIES	*		IN FOLD	ER.			16
Tasks	<ul> <li>A Priority: High: 1 item(s)</li> </ul>	a new lask												
	A Categories: (none): 1 ite	em(s)												
	🔀 🗆 Prepare for Prese	intation	D2	Wed 10/7/2	015 9:39 AM					Tasks				•

**16.** Click File  $\rightarrow$  Print:



**17.** With the Print category of Backstage view now displayed, you will see a preview of how the selected task will look on the printed page. Ensure that that the Memo Style is selected and that the printer that you would like to print to is selected from the Printer drop-down command:

œ		Te-De List - jsmith@acmewidgets.onmicroselt.com - Outlook		7 - 0 ×
Info	Print			
Open & Expert	Specify how you want the item to be pointed and			Г
Save As	"to:" then click Print. Print	John Smith		
Piet	Printer	Seljest Provi Sart Date Rida, Das Date Mida Priority, Kich	e for Presentation .October 15. 2015 .October 16. 2015	
	Boother Lasert 6 Ready	Status: Not Sta Percent Complete: 25	anel	
Office Account Options	Print Options	Total Work Ditour Actual Wark Ditour Owner: Join S	1 ion	
Feedback	Settings			
6it	Merro Strie			
			1	
	< 1_ of 1 →			A 100 100

**18.** Click the Print command:



**19.** The selected task will now be printed. Close Microsoft Outlook 2016.

# **TOPIC B: Manage Tasks**

As the number of tasks that you schedule grows, the ability to manage them becomes more and more important. Over the course of this topic, you will learn how to find the exact tasks that you would like to work with, assign tasks, tag tasks, and more.

### **Topic Objectives**

In this topic, you will learn:

- How to search tasks
- How to assign, tag, and move tasks
- How to mark a task as complete

# **SEARCHING TASKS**

With a long task list, it can become difficult to find a specific task that you would like to work with. To make finding specific tasks easier, a search field has been provided near the top right-hand corner of the Tasks workspace.

To use this feature, first click inside the field (or press Ctrl + E) and type the keywords that you would like to search for:



A list of results will immediately be shown that you can then work with:



Additionally, the Search Tools – Search contextual tab will be displayed on the ribbon. Here, you can narrow down your search even further by adding more search criteria (like due date or importance). When you have finished searching, click Search Tools – Search  $\rightarrow$  Close Search:

							Sea	arch Tool		To-Do Li	st - jsmi	ith@acmewid	lgets.onr	nicrosoft.co	m - Outlo	pok
File	Home	e !	Send /	Receive	Folder	View		Search	<b>Ω</b> T∉	ell me what y	ou war	nt to do				
2	Curren	t Fold	er	C.						$\checkmark$		×	+	$\mathcal{P}$	ΪΎ	×
All Task Items	🚡 All Out	tlook It	tems	Include Older Resu	Cat lits	egorized *	Start Date ≁	Due Date≖	Modified *	Completed Tasks *	Status ~	Importance *	More •	Recent Searches *	Search Tools <del>•</del>	Close Search
	Scope			Results					Re	fine				Optio	ns	Close

# **Assign Tasks**

To assign a task to another person, create a new task and then click Task  $\rightarrow$  Assign Task:



The Task form will now include the To field. Here, you can enter the e-mail address of the person who will be assigned this task. You can also specify if you want to keep a copy of the task in your list and if you want to receive a status report when the task is complete:

H	ా	¢	Ŷ	Ψ	÷				Schedule I	Meeting - Task	
File	Ta	isk In	sert l	Format Te	xt Review	Ω Τε	ell me wi	hat you want t	to do		
Save & Close	X Delete	0neNote	Task	Details	Cancel Assignment	Address Book	♥@ Check Names	Recurrence	Categorize Follov v Up v	<ul> <li>Private</li> <li>High Importance</li> <li>Low Importance</li> </ul>	Zoom
	Action	S	Sh	IOW	Manage Task	Nam	es	Recurrence		Tags	Zoom
Due	today.	To	<u>Jane Gibs</u> Schedule	on;   🗲 Meeting							
	Star	t date	Wed 10/7	7/2015		Status	No	t Started	•		
	Due	date	Wed 10/7	/2015		Priority	No	rmal -	<ul> <li>% Complete</li> </ul>	0% -	
	✓ ✓	Keep an up Send me a	odated co status rej	py of this port wher	task on my task this task is con	: list nplete					

When you are done, click Send to assign the task. Or click Save & Close to save the task and send it at another time.

### **TAGGING TASKS**

#### **Categorizing Tasks**

To help keep your tasks organized, you can assign color categories to them. To categorize a current task, click Task  $\rightarrow$  Categorize  $\rightarrow$  [Color Category]:



(Remember, when choosing a category for the first time, you will be prompted to give it a name.)

Once a category has been applied, you will see it displayed just below the ribbon:

~

### Flagging a Task for Follow Up

If you need to follow up on a task, you can flag it for follow-up. To do this, click Task  $\rightarrow$  Follow Up  $\rightarrow$  [Flag]:



Once a follow-up flag has been applied, you will see a follow-up statement appear just below the ribbon:

	5 (J	<b>↑</b> ↓	÷			Schedule Meeting - Task			<b>•</b>	×
File	Task Inse	ert Format T	ext Review	🖓 Tell me w	hat you want	to do				
Save & Close	Delete OneNote	Task Details	Cancel Assignment	Address Check Book Names	Recurrence	Categorize Follow Up + Low Importance	Zoom			
	Actions	Show	Manage Task	Names	Recurrence	Tags	Zoom			~
Follo Due	ow up. Start by Fri in 2 days.	day, October 9, 2	015. Due by Fri	day, October 9, 201	5.					

#### Marking a Task as Private

If you are using Microsoft Exchange Server and you do not want a task's details to be viewable by others, you can mark it as private. To do this, click Task  $\rightarrow$  Private:

	5	Q	Ŷ	Ψ	Ŧ			Schedule Meeting - Task	
File	Task	: Ins	sert	Format Te	ext Review	🔉 Tell me w	hat you want i	to do	
Save & Close	X Delete C	neNote	Task	Details	Cancel Assignment	Address Check Book Names	Recurrence	Categorize Follow Up + Up + Low Importance	Q Zoom
	Actions		S	how	Manage Task	Names	Recurrence	Tags	Zoom

Following this action, the Private button will appear shaded in to indicate that it has been marked private.

#### **Applying a Priority Level**

Priority levels help indicate how important a particular task is so that you can delegate your time more efficiently. You have the option to mark a task as High Importance or Low Importance. Both options are in the Tags group of the Task tab:

H	5	Q	Ť	ψ	÷			Schedule Meeting - Task	
File	Ta	sk In	sert	Format Te	ext Review	♀ Tell me w	hat you want	to do	
Save & Close	X Delete	OneNote	Task	Details	Cancel Assignment	Address Check Book Names	Recurrence	Categorize Follow Up + Low Importance	Q Zoom
	Actions		Sł	now	Manage Task	Names	Recurrence	Tags	Zoom

### MARKING A TASK AS COMPLETE

Once you have finished a task that has been assigned to you, you should mark it as complete. To do this, click Task  $\rightarrow$  Mark Complete with the task open:

H			Ŷ	Ψ						Schedule Meeting - Task	
File	Task	Inser	t	Format Te	kt R	eview 🤇	2 Tell n	ne what you v	vant to do		
Save & Close	Delete For	ward On	Note	Task	Details	Mark Complete	Assign Task	Send Status Report	Recurrence	Categorize Follow Up + Up +	Zoom
	Action	s		Sh	DW	V S	lanage 1	lask 🛛	Recurrence	Tags	Zoom

Alternatively, you can mark a task as complete from the Tasks workspace by clicking to select that task and then clicking Home  $\rightarrow$  Mark Complete:

Ē	্য ÷						To-Do	List - jsmith@ac	mewidgets.onmic
File	Home	Send / Re	ceive Fo	lder Vie	ew ♀ Tell	me what yo	ou want to o	do	
2	-	$\boldsymbol{X}$		2 🗳	🖳 Meeting	$\checkmark$	×	Today Tomorrow	▶ Next Week ▶ No Date
New Task	New New Email Items≖	Delete	Reply Rep A	ly Forward	🗓 More 🔻	Mark Complete	Remove from List	This Week	Custom
	New	Delete		Respond		Manag	je Task	Follo	w Up

The selected task will then be removed from the To-Do List. Its subject line will have a strikethrough to indicate that it is done.

# **MOVING TASKS**

To move a task from one folder to another, click and drag the task in question from the workspace into the destination folder in the Navigation pane:

File Home	∓ send / Re	ceive	Folder View Q Tell	To-Do me what you want to d	List - jsmith@acmewidgets.onmi	crosoft.com -	Outlook		æ	<u> </u>	×
New New N Task Email Iter	ew Delete	Reply	Reply Forward More *	Mark Remove Complete from List	Today     Next Week     Tomorrow     No Date     This Week     Custom	Detailed	Simple List To-Do List	Move OneNote Categ	orize	Search People	:
New	Delete		Respond	Manage lask	Follow Up		Current View	Actions	lags	Find	^
▲ My Tasks		<					Search To-Do List (Ctrl+E)				P
To Do List			TASK SUBJECT	START DATE	REMINDER TIME		DUE DATE	IN F CATEGORIES		2	212
Tasks 🐼 P	repare for Prese	ntation	Click here to add a new Tas	k None							
he.	×		🔺 🕨 Flag: Due Date: Today	/							
			Schedule Meeting	Wed 10/7/2015	None		Wed 10/7/2015	Tasks			
			🔺 📔 Flag: Due Date: Next	Week							
			Prepare for Presentation	Fri 10/16/2015	None		Fri 10/16/2015	Tasks			

Releasing your mouse button will complete the move.

# **ACTIVITY 7-2**

# **Managing Tasks**

Now that your Tasks workspace has become populated with new tasks, you would like to manage them. Students will need to have created one task with "presentation" somewhere in its subject before starting this activity.

**1.** To begin, open Outlook 2016:



2. Display the Tasks workspace by clicking the Tasks button in the Navigation pane:



**3.** The Tasks workspace will now be displayed:

雷 5 = File Home Send / Receive	To-Do Folder View Q Tell me what you want to c	List - jsmith@acmewidgets.onmicrosoft.com - ( Io	Outlook	1	
New New New Task Email New Delete	Reply Forward @ More - All Respond	Today     Next Week     Tomorrow     No Date     This Week     Custom     Follow Up	Simple List To-Do List	Move OneNote	Find
4			Search To-Do List (Ctrl+F)		۵
▲ My lasks	DI TASK SUBJECT	DEMINDED TIME			10112
To-Do List	Click here to add a new Task				14411
Tasks	A Flam Due Date: Tortay				
	Schedule Meeting Wed 10/7/2015	None	Wed 10/7/2015	Tasks	•
	A Flag: Due Date: Next Week				
	Prepare for Presentation Fri 10/16/2015	None	Fri 10/16/2015	Tasks	
as 🖸					

**4.** Press Ctrl + E to focus on the search text box. Type "presentation" and the results will immediately be displayed:

· 圖 ち =		To-Do List - jsmith@ac	mewidgets.onmicrosoft.com - C	Dutlook		
File Home Send / Receive Fo	older View Search	Q Tell me what you want to do				
Current Folder	📕 🔍 🟲	📡 🗸 🖻 🕨	\$ 🛨 🔎 🖞	ĭ 🛛		
All Task All Outlook Items Include Items Older Results	Categorized Start Due M	odified Completed Status Impor * Tasks * *	tance More Recent Sear * Searches * Tool	rch Close Is * Search		
Scope Results		Refine	Options	Close		^
∡ My Tasks				presentation +		×
To-Do List	TASK SUBJECT	START DATE	REMINDER TIME	DUE DATE	IN F CATEGORIES	<b>☆</b>  ₹
Tasks	Click here to add a new Task					
	🖌 📔 Flag: Due Date: Next Week					
1.	Prepare for Presentation	Fri 10/16/2015	None	Fri 10/16/2015	Tasks	<b>P</b>

5. Double-click the top-most result:



**6.** The task will now be open in the Task window. Categorize this task using the blue category by clicking Task  $\rightarrow$  Categorize  $\rightarrow$  Blue Category:



(If you are prompted to rename the category, click Yes to proceed.)

7. You will see the blue category shown above the To field:



**8.** Now mark this task complete by clicking Task  $\rightarrow$  Mark Complete:



9. Close the Task window and then close Microsoft Outlook 2016 to complete this activity.

# **TOPIC C: Manage Notes**

Outlook 2016 provides you with a quick way to record, view, and manage short notes. In this topic, you will learn all about notes in Outlook 2016 and how to manage them.

### **Topic Objectives**

In this topic, you will learn:

- About notes and the Note form
- About note views
- How to categorize notes
- How to print notes

### NOTES

Outlook's notes are quite like traditional sticky notes in their format and function. They allow you to record small bits of information that you might need to refer to later. For example, you could use a note to record a list of items that you need to pick up for an upcoming project or presentation.

All notes in Outlook are stored and managed in the Notes workspace. This is opened by clicking the More button at the bottom of the Navigation pane and then clicking the Notes option:



The Notes workspace will list any notes that exist. You will also see tools to create new notes:



# NOTE FORM

To create a new note, click the New Note command on the Home tab while in the Notes workspace:

Ē	5	÷						Notes - jsmith	n@acmewidgets.onm
File	Ho	me	Send / Receive	Folder	View Q	Tell	me what you want	to do	
New	New	Delete	e Icon	Notes List	Last 7 Days	<ul> <li>■</li> </ul>	Forward Move	Categorize	Search People
BN	ew	Delet	2	Current Vie	w		Actions	Tags	Find

A new note will appear over the Outlook 2016 interface. At the bottom of the note will be the current date as well as the current time. Simply click and type to create the note:

e S	÷						Notes - jsmitł	n@acmewidgets.onmici
File Ho	me Se	nd / Receive	Folder	View 🛛	Tell me what	you want	to do	
New New Note Items •	X Delete	lcon	Notes List	Last 7 Days	Forwar	d Move	Categorize	Search People
New	Delete		Current Vie	w	Ac	tions	Tags	Find
⊿ My Notes		<						
Notes				_				
	10/7	7 <u>/2015 10:31</u>	AM	×				

# **NOTE VIEWS**

There are a few different views that are used to change how notes are displayed in the Notes workspace. You can find all these different views inside the Current View group on the Home tab. Clicking on any of these views will apply them:

	5	÷							I	Notes - jsmith	@acmewidgets.onmi
File	Ho	me	Se	nd / Receive	Folder	View	♀ Tell	me what y	ou want	to do	
New Note	New Items *	Delet	e e	lcon	Notes List	Last 7 D	ays Ţ	Forward	Move	Categorize	Search People
Ne	ew.	Delet	e		Current Viev	N		Actio	ons	Tags	Find

By default the **Icon view** will display all of your notes as small icons and arrange them in a grid. Each icon will display the first line from the note that it represents:

5 F	Notes - jsmith@acmewidgets.or	nmicrosoft.com - Outlook	፼ – □ ×
File Home Send / Receive	Folder View Q Tell me what you want to do		
New New Note Items	Notes List Last 7 Days v	*	
New Delete	Current View Actions lags Find		^
⊿ My Notes		Search Notes (Ctrl+E)	۵
Notes	Shopping		
1 as 2	All fallers are up to	data Connected to Microroff Sydness III	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
The first of	Autoriters are up to	connected to: Microsoft Exchange	- T 100/6

The **Notes List view** will display all of your notes as a simple list. Each item will include the first line from the note as a subject line, the date the note was created, and any categories that the note belongs to:

File	5 He	≂ ome	Send	/ Receive	Folder	View Q Tell	me what you want	Notes - jsmiti to do	n@acmewidgets.onn	nicrosoft.com - Ou	utlook			æ	-	×	
New Note	New Items *	Delet	•	Icon	Notes List	Last 7 Days =	Forward Move	Categorize	Search People								
Ne	W	Delet	e	<	Current Vie	w	Actions	Tags	Find		(					-	^
⊿ My	Notes										Search Notes (Ctrl+E)					ر ر	
Note	es				Shoppin	T na list						CREATED	0-31 AM	CATEGORIE			
	_		151														
Items: 1	mi	24						A	l folders are up to da	te.	Connected to: I	Microsoft Exchange		e B		+ 100%	

Finally, the **Last 7 Days view** will list notes that have been created in the past week in list form (similar to the Notes List view).

### **CATEGORIZING NOTES**

Like other objects in Outlook 2016, you can categorize notes to help keep them organized. To begin, first click to select the note from the Notes workspace. Then, click Home  $\rightarrow$  Categorize  $\rightarrow$  [Category]:

	÷					I	Votes	- jsmitł	h@acmewidgets.onr	mic
File	Home	Send / Receive	Folder	View 🛛 Tell	me what y	ou want	to do.			
New New Note Items	Delete	lcon	Notes List	Last 7 Days	Forward	Move	Cate	gorize	Search People	
New	Delete		Current Viev	N	Actio	ons		<u>C</u> lear	All Categories	
▲ My Note Notes	S	<						Blue of Green	category	
			Shopping List	9				Red o Orang	ategory ge category	
								Purpl	e category	
								Yello	w category	
								<u>A</u> ll Ca	ategories	
								Set <u>Q</u>	uick Click	

(Remember, when choosing a category for the first time, you will be prompted to give it a name.)

Once a note has been categorized, the color category that you selected will be applied to the note and its associated icon:



# **PRINTING NOTES**

To print one or more notes, first click to select the note(s) that you would like to print from the Notes workspace. Next, click File  $\rightarrow$  Print:



With the Print category of Backstage view selected, you will see a preview of how the selected note(s) will appear on the printed page. Ensure that you have the correct printer selected in the Printer drop-down menu and then click the Print command:

Æ	Notes - jsmith@acmewid	gets.onmicrosoft.com - Outlook ?	- 🗆 ×
	Drint		
Into Onen & Evnort	FTITIL		
	Specify how you want the item to be printed and then click Print.		
	Print	John Smith ModiFied: Fri 1019/2015 10.52 AM	
	Printer Send the item directly to the default printer without making changes.	Shopping List	
	Stother Laser #:6 Ready	Mik Egs Kvad	
Options	De Print Options		
Feedback	Settings		
	Memo Style		
		1	
	< 1 of 1 ≽		

Note that there is only one print style: **Memo Style**. This will print the selected note in a memolike fashion. This means that the printout will include the name of who created the note, when the note was last modified, and the contents of the note.

# **ACTIVITY 7-3**

# **Creating and Managing Notes**

To prepare for an upcoming presentation, you would like to create a note that includes what items you need to purchase.

**1.** To begin, open Microsoft Outlook 2016:

월 5 F		Inbox - jamith@scmewidgets.onmicrosoft.com - Outlook 🛛 🚽 🗆 🗙
File Home Send / Receive	Folder View 🖓 Tell me what you want to do	
New New Ermail Items - New Delete	Reply Reply Forward Mare * All Repond	Constant weight of the second s
▲ Favorites	Search Current Mailbox ( 🔎 Current Mailbox 🔹	Ca Reply (Ca Reply All Ca Forward
Inbox 4 Clutter Sent items Drafts	All Unread By Date * Newest + * Tomorrow John Smith is Retirement Fri 10(2/2015 1:37 PM Hey all, Jee ti going to be	John Smith <a bound="" boutlook="" com="" sets=""> aww.swe 8 in instants Joe's Retirement v</a>
▲ jsmith@acmewidgets.onmicr	▲ Last Week	Action Items
Inbox 4 Drafts	msftconn@microsoft Program Closing - Office 20 Mon 9/21	Hey all,
Sent Items Deleted Items 3	4 Older	Joe is going to be retiring soon, so I thought we could throw a small celebration. Please let me know your availability for next week.
Clutter Conversation History	UneNote Leam Melcome to OneNote 7/31/2015 Get OneNote for free on all	Thanks,
Junk Email Outbox	There are more items in this folder on the server Click here to view more on Microsoft Exchange	John
> Search Folders		
I Groups		
M 28 🖾 ···		

**2.** Display the Notes workspace by clicking the More button in the Navigation pane and then clicking the Notes button:



**3.** Create a new note by clicking Home  $\rightarrow$  New Note:

	5	÷						Notes - jsmith	n@acmewidgets.onmic
File	Ho	me	Send / Receive	Folder	View Q	7 Tell	me what you wan	t to do	
New Note	New	X Delete	lcon	Notes List	Last 7 Days	4 >  +	Forward Move	Categorize	Search People
L3N	ew	Delete		Current View	N		Actions	Tags	Find

**4.** A new note will appear over the Outlook 2016 interface in a type of dialog box. At the bottom of the note will be the current date as well as the current time:



5. If you wish, you can click and drag this note by the title bar to move it to a new location:



**6.** To start adding the content of the note, click inside of it and then start typing. For this example, type the following:



**7.** After you have finished recording the new note, click the Close button in its top right-hand corner:

<b></b>	K
Presentation Supplies:	45
Easel	
Black Sharpie	
Blue Sharpie	
Flip board	
10/7/2015 10:55 AM	

8. Returning to the Notes workspace, you will see the new note listed:



**9.** With the note that you just created selected in the Notes workspace, click Home  $\rightarrow$  Categorize  $\rightarrow$  Blue Category:

5	÷		١	Notes - jsmith@acmewidgets.or
File Home	Send / Receive	Folder View ♀ Tell	me what you want	to do
New New De	elete Icon	Notes List Last 7 Days	Forward Move	Categorize
New De	elete	Current View	Actions	<u>C</u> lear All Categories
▲ My Notes	<			Blue category
Notes		Shopping Presentation List Supplies:		Green category by Red category Orange category Purple category Yellow category All Categories Set Ouick Click

(If you are prompted to rename the category, click Yes to proceed.)

**10.** The selected note will now be categorized using the blue category:



**11.** Double-click on this note. You will see that the applied category color will also be represented by the note itself:

6	X
Presentation Supplies:	
Easel	
Black Sharpie	
Blue Sharpie	
Flip board	
10/9/2015 11:00 AM	_//

**12.** Close the open note and then close Microsoft Outlook 2016.

# Summary

Over the course of this lesson you learned how to work with and manage tasks and notes. You should now be comfortable creating simple tasks, as well as managing them using the Tasks workspace. Additionally, you should be comfortable with the concept of notes in Outlook 2016, as well as how to create and manage them. You should also be familiar with the different ways that you can print both objects, as well as view them in their respective workspaces.

# LESSON 8: CUSTOMIZING THE OUTLOOK ENVIRONMENT

# **Lesson Objectives**

In this lesson you will learn how to:

- Customize the Outlook interface
- Create and manage Quick Steps

# TOPIC A: Customize the Outlook Interface

Now that you are comfortable with the features and general interface in Outlook 2016, you can begin to customize it to suit your individual requirements. Over the course of this topic you will learn about the various ways that you can customize the Outlook interface.

### **Topic Objectives**

In this topic, you will learn:

- How to set general Outlook options
- How to customize and move the Quick Access toolbar
- How to minimize and customize the ribbon interface
- How to reset interface customizations

# **SETTING GENERAL OUTLOOK OPTIONS**

Outlook's customization options are found in the Outlook Options dialog. To access this dialog, click File  $\rightarrow$  Options:



Next, ensure that the General category is displayed:

Outlook Options		?	×
General Mail	General options for working with Outlook.		
Calendar	User Interface options		
Groups People Tasks	<ul> <li>✓ Show Mini Toolbar on selection ^①</li> <li>✓ Enable Live Preview ^①</li> <li>ScreenTip style: Show feature descriptions in ScreenTips</li> </ul>		
Search	Personalize your copy of Microsoft Office		
Language Advanced	User name: John Smith		
Customize Ribbon Quick Access Toolbar	Always use these values regardless of sign in to Office. Office Background: Clouds Office Theme: Colorful		
Trust Center	Start up options		
	☑ Make <u>O</u> utlook the default program for E-mail, Contacts, and Calendar Defau	ult <u>P</u> rogran	15
	ОК	Ca	ncel

Inside the "User Interface options" section, you will see checkboxes to disable the mini toolbar and Live Preview. In addition, the "ScreenTip style" drop-down menu allows you to control how ScreenTips are displayed. By default, ScreenTips will display the title of the command, as well as a brief description about what it does. However, you have the option to hide these descriptions or even disable ScreenTips entirely:



Inside the "Personalize your copy of Microsoft Office" section, you can choose the username and initials that you would like to be associated with your copy of Microsoft Office. As well, you can change the Office theme that the Outlook interface uses from colorful (the default) to dark gray or white, and modify the Office background:

Personalize your copy of Microsoft Office		
<u>U</u> ser name:	John Smith	
Initials:	ZL	
Always use these	values regardless of sign in to Office.	
Office <u>B</u> ackground:	Clouds	
Office <u>T</u> heme:	Colorful V	
	Colorful 13	
Start up options	Dark Gray	
Make Outlook th	White acrount program for E-mail, Contacts, and Calendar	Default <u>P</u> rograms

Below this section, there is a checkbox that will make Outlook the default program for handling email messages, contacts, and calendars.

# **CUSTOMIZING QUICK ACCESS TOOLBAR BUTTONS**

The Quick Access toolbar is provided to give you quick access to the commands you use most, so it makes sense that you can customize it. To add buttons to the Quick Access toolbar, click the drop-down arrow ( ) next to it:



In the drop-down menu that appears, click on any commands you want to add to the toolbar. If a command has a check by it, it means it's active and on the toolbar. You can click on any of these commands to remove them from the toolbar.

If the command that you would like to add to the Quick Access toolbar isn't listed in the dropdown arrow menu, you have a few different options available to you. First, you can right right-click almost any command on the ribbon and click "Add to Quick Access Toolbar:"



The selected command will then be immediately added to the Quick Access toolbar. From there, you can remove buttons from the Quick Access toolbar in a similar manner: right-click the command in question and then click "Remove from Quick Access Toolbar."

Ē	5 X	<b>₩</b>
File	Home	Remove from Quick Access Toolbar
-		<u>C</u> ustomize Quick Access Toolbar Show Quick Access Toolbar Below the Ribbon
New N Email Ite New	vew ems ▼ 🖏 J	Customize the <u>R</u> ibbon Collapse the Ribbo <u>n</u>

If you still cannot find the command that you would like to add to the Quick Access toolbar, click the drop-down arrow and click More Commands:



This action will display the Outlook Options dialog, open to the Quick Access Toolbar category:

Outlook Options		?	×
General Mail	Customize the Quick Access Toolbar.		
	Choose commands from: 1		
Calendar	Popular Commands 🗸		
Groups	Customize Quick Access Toolbar: ()		
People	<separator></separator>		
	Account Settings 🕤 Undo		
Tasks	📑 Address Book		
Search	Automatic Replies		
	Close All Items		
Language	X Delete		
Advanced	Empty Deleted Items		
	Find Contact		
Customize Ribbon	E Forward		
Quick Access Toolbar	Manage Rules & Alerts		
	Meeting		
Add-ins	New Appointment <u>A</u> dd >>		
Trust Center	S New Contact		-
	New Email		
	P Renh		
	Reniv All		
	Da Save All Attachments		
	Save As		
	Send/Receive All Folders		
	Couch/Mouse Mode		
	S Undo		
	☐ S <u>h</u> ow Quick Access Toolbar below the Ribbon Customizations: Reset ▼ ① Import/Export ▼	0	
	ОК	0	ancel

Using the controls here, you are able to add commands to, and remove commands from, the Quick Access toolbar. By selecting a category from the **"Choose commands from" drop-down menu (1)** you can find exactly the **command** that you would like to add from the list **(2)**. Once you have found the command in question, click to select it and then click the **Add button (3)**:



To remove a button, click to select it from the **list on the right (1)** and then click the **Remove button (2)**:

Outlook Options		?	×
Outlook Options General Mail Calendar Groups People Tasks Search Language Advanced Customize Ribbon Quick Access Toolbar Add-ins Trust Center	Customize the Quick Access Toolbar.   Popular Commands from: ①   Popular Commands   < Separator>   Account Settings   Address Book   Automatic Replies   Coise All Items   Delete   Empty Deleted Items   Find Contact   Forward   Manage Rules & Alerts   Meeting   New Contact   New Contact   New Contact   New Contact   Print   Q Options   Print   Q Reply   Reply All   Save As   Send/Receive All Folders   Touch/Mouse Mode	?	× *
	✓ Undo     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓     ✓ <t< td=""><td></td><td></td></t<>		
	ОК	С	ancel

The changes will automatically be applied. Click OK to close the dialog box.

# MOVING THE QUICK ACCESS TOOLBAR

If you prefer, you can move the Quick Access toolbar so that it appears below the ribbon rather than above it. To do this, click the Customize Quick Access Toolbar arrow and click "Show Below the Ribbon:"



Here's what the Quick Access toolbar will look like if it is moved below the ribbon:



You can move the Quick Access toolbar back to above the ribbon by clicking the Customize Quick Access Toolbar arrow and then clicking "Show Above the Ribbon."

### **MINIMIZING THE RIBBON INTERFACE**

While the ribbon interface can be very useful, it can take up a lot of screen real estate. If you find yourself wanting more room to work with Outlook 2016, you can minimize the ribbon interface. To do this, click the Ribbon Display Options button near the upper right-hand corner of the Outlook window and then click Show Tabs:



Once the ribbon interface has been minimized, you will only see the tab names:



Clicking on any of these tabs will automatically expand the ribbon, while clicking a command or clicking elsewhere in the Outlook 2016 interface will minimize it again.

To return the ribbon back to its default expanded state, click the Ribbon Display Options button near the upper right-hand corner of the Outlook window and then click "Show Tabs and Commands:"



The "Auto-hide Ribbon" option on this menu will display the Outlook 2016 window full screen and hide the entire ribbon unless you move your cursor over that area:

			· · ×
😂 New Email	Search Current Mailbox (CtrL 🔑 Current Mailbox 🔹	G Reply G Reply All G Forward	
	All Unread By Date * Newest 4	John Smith <abcv idgets@outlook.com=""> John Smith</abcv>	10/0/2015
▲ Favorites	▲ Friday	Documents	~
Inbox 4	DocuSign via DocuSign	Durante fam	
Clutter	Action Required - Activate Your Pri 10/9/201 Action Required - Activate Your	Uscumernation -	
Sent nems	4 Tomorrow		
	John Smith	Hey John,	
4 ismith@acmewidgets.onmic	Documents Thu 10/8/2015 2:13 PM		
Inbox 4	ing and infinition	Here are the documents that you requested for review.	
Drafts	John Smith 8 14 Joe's Retirement Thu 10/8/2015 12:07 PM	Thanks,	
Sent Items	Hey all, Joe is going to be		
Deleted hems 2	4 Today	Joe	
Clutter	John Smith		
Conversation History	Requested Documents 1239 PM		
Junk Email	✓ Last Week		
BSS Eastr	Microsoft Online Servic Your Veloft password has been Tue 9/29		
2 Search Folders	Password reset notification		
	There are more items in this folder on the server		
P Groups	Click here to view more on Microsoft Exchange		
🔤 📾 🗳 ···			

### **CUSTOMIZING THE RIBBON**

You also have the option to customize the ribbon and what controls appear on it. To get started, click File  $\rightarrow$  Options, and then click the Customize Ribbon category in the Outlook Options dialog box. This view should look familiar to you, since customization of the Quick Access toolbar is very similar:

Outlook Options	?	×
General       Image: Customize the Ribbon.         Mail       Choose commands from: Image: Choose commands from: Im	Add >>         Add >>         <	
	OK Cancel	

#### Adding or Removing Tabs

The list on the right-hand side of the Customize Ribbon category shows all the main tabs in Outlook 2016:



All tabs that include a checkmark are either visible or will be visible under the right conditions. For example, there is a Home tab for each Outlook workspace. The tab that is visible depends on the type of workspace that you are in.

To add or remove a tab, check or uncheck the checkbox adjacent to the tab name. If you like, you can even have no tabs at all.

#### Arranging Tabs and Groups

You can rearrange the order of tabs, groups, and individual commands. First, expand a tab or group by clicking the + sign adjacent to it:

Customize the Ri <u>b</u> bon: 🛈	
Main Tabs	$\sim$
Main Tabs	
R 🗹 Home (Mail)	
Home (Calendar Table View)	
🗉 🗹 Home (Calendar)	
🕀 🗹 Home (Tasks)	
🗉 🗹 Home (Notes)	

This will expand the contents of that tab or group. To rearrange items within either object type, select an item and then click the up or down arrows to the right of the list box. Alternatively, click and drag to change the order:

^

#### **Creating New Tabs and Groups**

You can create your own tabs and groups using the commands near the bottom right-hand corner of the Outlook Options dialog:

General     Image: Customize the Ribbon.       Mail     Choose commands from: ①     Customize the Ribbon.       Calendar     Popular Commands from: ①     Customize the Ribbon.       Groups     Image: Customize the Ribbon.     Image: Customize the Ribbon.	n Tabs	
Calendar Choose commands from: ① Custo Popular Commands ✓ Mair Groups	iomize the Ribbon:① n Tabs n Tabs Nome (Mail)	
Groups	n Tabs v n Tabs All Tabs v Home (Mail)	·
Groups	n Tabs	•
	n Tabs	•
People Account Settings Main		
Tasks Automatic Replies	New	
Search Manage Rules & Alerts	Actions     Delete	
Language Meeting New Appointment	Respond     Quick Steps	
Advanced	E Move	
Customize Ribbon	I Tags	
Ouick Access Toolbar	Chinese Conversion	
Print	Find	
Add-ins Save As Add >>	<ul> <li>Add-Ins</li> <li>Send/Receive (IMAP/POP)</li> </ul>	
Trust Center Send/Receive All Folders << Remove	Home (Calendar Table View)	-
S Undo	Home (Calendar)	
	Home (Contacts)	
	Home (Tasks)	
	Home (lournals)	
	Home (Group)	
	Send / Receive	
	Folder	,
Ne	e <u>w</u> Tab <u>N</u> ew Group Rena <u>m</u> e	1
Cust	omizations: R <u>e</u> set •	
	Import/Export	
	OK	Cancel

Click New Tab to create a tab and then fill it with as many groups as you would like. You can also select a new tab or group and use the Rename button to give the new item a meaningful name:

<u>A</u> dd >>	Add-ins     Send/Receive (IMAP/POP)
<< <u>R</u> emove	New Tab (Custom)
	New Group (Custom)
	Home (Tasks)
	Home (Notes)      Home (lournals)
	<ul> <li></li></ul>
	New Tab New Group Rename
	Customizations: Reset 🕶 🕕
	Import/Export 🔻 🛈
	OK Cancel

Note that if you select a custom tab and click the Remove button, that tab will be removed completely.

#### **Customizing Group Commands**

You can customize any groups that you have added, either to custom tabs or to the default tabs. To add a command to a custom group, expand the group that you want to fill with commands, select a command from the list on the left of the dialog box, and then click Add:

Outlook Options			?	×
Outlook Options General Mail Calendar Groups People Tasks Search Language Advanced Customize Ribbon Quick Access Toolbar Add-ins Trust Center	Customize the Ribbon. Choose commands from: Popular Commands Address Book Address Book Automatic Replies Close All Items Manage Rules & Alerts Manage Rules & Alerts Manage Rules & Alerts Mew Contact New Contact New Task Options Print Save All Attachments Save As Save As Sur ARcecive All Folders Undo Work Offline	Add >>            Add >>            Add >>                  Add >>	?	×
		Ne <u>w</u> Iab New Group Rena Customizations: Reset ▼ ③ Import/Export ▼ ④	<u>m</u> e	ancel

To remove a command, select it in the list on the right and click the Remove button:

Add >> << <u>R</u> emove	<ul> <li>➡ Find</li> <li>➡ Add-ins</li> <li>➡ Send/Receive (IMAP/POP)</li> <li>➡ New Tab (Custom)</li> <li>➡ New Group (Custom)</li> <li>➡ New Email</li> </ul>		
	<ul> <li>Home (Calendar)</li> <li>Home (Contacts)</li> <li>Home (Tasks)</li> <li>Home (Notes)</li> <li>Home (Journals)</li> </ul>		
	New Tab     New Group     Rename       Customizations:     Reset ▼     i       Import/Export ▼     i		
	OK Cancel		

### **RESETTING CUSTOMIZATIONS**

To reset all the interface changes that you have made, open the Outlook Options dialog to the Customize Ribbon category. Then, click Reset  $\rightarrow$  Reset all customizations:

⊕ 🗹 Home (Jou	irnals)	<b>v</b>
Ne <u>w</u> Tab	<u>N</u> ew Group	Rena <u>m</u> e
Customizations:	R <u>e</u> set ▼	0
	Reset on	ly selected Ribbon tab
	Reset all	customization OK Cancel

Click Yes when you are prompted to confirm the operation:



# **ACTIVITY 8-1**

# **Customizing the Outlook Interface**

As you have been incorporating Outlook 2016 more and more into your workflow, you would like to better customize it suit your needs.

**1.** To begin, open Outlook 2016 to your Inbox:

· 昭 ち ÷		th@acmewidgets.onmicrosoft.com - Outlook 🛛 🗖 🗕 🗆 🗙
File Home Send / Receive	Folder View Q Tell me what you want to do	
New New Email Items - New Delete	Reply Reply Forward @ More * All Respond Quit	Contactionager Dance     Image: Contactionager Dance     Image: Contactionager Work     Image: Contactionager Read     Image: Contactionager Up: Contactionager Read     Image: Contactionager Up: Con
✓ Favorites	Search Current Mailbox (Ctrl 🔎 Current Mailbox 🔹	Q. Reply Q. Reply All Q. Forward
Inbox 4 Clutter Sent Items	All Unread By Date * Newest 4	John Smith <abcwidgets@outlook.com> John Smith &lt;</abcwidgets@outlook.com>
Drafts	JONN SMITH U Documents Thu 10/8/2015 2:13 PM Hey John, Here are the	Documents.docx . 195 KB
<ul> <li>ismith@acmewidgets.onmic</li> <li>Inbox 4</li> </ul>	John Smith 🔋 🕞 Joe's Retirement Thu 10/8/2015 12:07 PM Hey all, Joe is going to be	Hey John,
Sent Items	4 Today	Here are the documents that you requested for review.
Deleted Items 2 Clutter	John Smith 🛛 🕅 Requested Documents 12:39 PM	Thanks,
Conversation History	4 Last Week	Joe
Junk Email Outbox	Microsoft Online Servic Your password has bee Tue 9/29 Password reset notification	
RSS Feeds > Search Folders	There are more items in this folder on the server Click here to view more on Microsoft Exchange	
▷ Groups		
20 20 20 20 20 20 20 20 20 20 20 20 20 2		
First, you would like to add the Delete command to the Quick Access toolbar so that you can access it more quickly. Right-click the Delete command on the Home tab and click "Add to Quick Access Toolbar:"

	5	÷						Ir
File	Ho	me	Send / F	leceive	Folder	View	♀ Tell me wł	nat you want t
New	New		gnore Clean Up <del>-</del>	X Delete	Reply F	Reply Forw	ard 🛅 More -	Move Team
Email Ne	ltems • w	• <u>•</u>	UNK≚ Delete		<u>A</u> dd to Q	uick Access	Toolbar	
					<u>C</u> ustomiz	e Quick Aco	cess Toolbar	~~
					Show Qu	ick Access T	oolbar Below th	e Ribbon
					Customiz	e the <u>R</u> ibbo	n	
					Collapse	the Ribbo <u>n</u>		

**3.** Examine the Quick Access toolbar. You will now see the Delete command:



4. Now you would like to add the Print command to the Quick Access toolbar. Click the drop-down arrow (²) next to the Quick Access toolbar and click Print:



5. Examine the Quick Access toolbar. You will now see that the Print command has been added to it:



**6.** To save space in the Outlook 2016 window, you would like to minimize the ribbon. Click the Ribbon Display Options button near the upper right-hand corner of the Outlook window and then click Show Tabs:



7. The ribbon will now be minimized with only the tab names displayed:



8. Now you need to create a new tab. Right-click any ribbon tab and click "Customize the Ribbon:"



**9.** The Outlook Options dialog box will now be displayed with the Customize Ribbon category selected:

**10.** Near the lower right-hand corner of the Outlook Options dialog box, click the New Tab button:



**11.** You will now see two new entries ["New Tab (Custom)" and "New Group (Custom)"] after the Add-Ins tab in the tabs list:

Main Tabs
🗉 🗹 Home (Mail)
🗉 🗹 Home (Calendar Table View)
🗉 🗹 Home (Calendar)
🗉 🗹 Home (Contacts)
🗉 🗹 Home (Tasks)
🗉 🗹 Home (Notes)
🗉 🗹 Home (Journals)
🗉 🗹 Home (Group)
🗉 🗹 Send / Receive
🗉 🗹 Folder
🗉 🗹 View
🗉 🗌 Developer
🗉 🗹 Add-ins
🗆 🗹 New Tab (Custom)
New Group (Custom)

**12.** Select "New Tab (Custom)" and then click the Rename button:

<u>A</u> dd >> << <u>R</u> emove	<ul> <li>➡ Folder</li> <li>➡ View</li> <li>➡ Developer</li> <li>➡ Add-ins</li> <li>➡ New Tab (Custom)</li> </ul>	<ul> <li>▲</li> <li>▼</li> </ul>
	New Group (Custom)	
	New Tab     New Group     Rename       Customizations:     Reset ▼     i       Import/Export ▼     i	
	ОК	Cancel

**13.** In the Rename dialog box, type "My Tab" and then click OK:

Rename				?	×
Display name:	My Tab				
		OK	6	Ca	ncel

**14.** Click to select the "New Group (Custom)" group within My Tab (which you just created). Click to select the Meeting command from the "Choose commands from" list. Click Add:

General       Mail         Galendar       Customize the Ribbon.         Groups       Popular Commands       ✓         People       Account Settings       ✓         Address Book       Automatic Replies       ✓         Search       Automatic Replies       ✓         Language       New Contact       Ø         Advanced       Ø       Home (Calendar)         Outick Access Toolbar       New Task       Ø         Outick Access Toolbar       Save All Attachments       Save All Attachments         Save All Attachments       Save All Attachments       Save All Attachments         Save As       Send/Receive All Folders       ✓         Vindo       Work Offline       ✓         New Group (Custom)       New Group (Custom)         New Group (Custom)       New Group (Custom)

# **15.** Repeat Step 14 to add the New Appointment, New Contact, New E-mail, and New Task commands to the new tab:



**16.** Click OK to apply the new changes and close the Outlook Options dialog box:

🗆 🗹 My Tab (C	Custom)
E New G	Group (Custom) Meeting New Appointment New Contact New Email
	New Task
Ne <u>w</u> Tab	New Group Rename
Customizations:	R <u>e</u> set 🔻 🛈
	Import/Export 🔻 🛈
	OK Cancel

**17.** Back at the Outlook 2016 window, you will see your new tab on the ribbon. Click it to expand it and view the commands that you added to it:



**18.** To reset the Outlook 2016 interface back to its default state, right-click on any tab and click "Customize the Ribbon:"

	<b>১</b> 🗙	-	Ŧ			Inbo	<ul> <li>ismith@acmewidgets.onmicrosoft.com - Ou</li> </ul>
File	Home	Send / Rec	eive	Folder	View	My Tab	♀ Tell me what you want to do
						<u>C</u> u: Sho	stomize Quick Access Toolbar ow Quick Access Toolbar Below the Ribbon
						Cu	stomize the <u>R</u> ibbon
						✓ Col	llapse the Ribbo <u>n</u>

**19.** Next, near the lower right-hand corner of the Outlook Options dialog box, click Reset → Reset all customizations:



**20.** A dialog box will be displayed to confirm this operation. Click Yes to continue:

Microsoft	t Office	×
	Delete all Ribbon and Quick Access Toolbar customizations for this program	1?

**21.** In the Outlook Options dialog box, click the OK button:

Ne <u>w</u> Tab	New Group Rer	na <u>m</u> e
Customizations:	R <u>e</u> set ▼ i	
	Import/Export 🔻	D
	ОК	Cancel

22. Close Microsoft Outlook 2016.

# TOPIC B: Create and Manage Quick Steps

Quick Steps are used to help you complete common actions in a more timely and efficient manner. While there are several preconfigured Quick Steps to choose from, you also have the option to create your own. Over the course of this topic, you will learn all about Quick Steps and how to create them.

#### **Topic Objectives**

In this topic, you will learn:

- About Quick Steps
- How to use, create, and reset Quick Steps
- About the Manage Quick Steps dialog box

# **QUICK STEPS**

Quick Steps are used to complete actions that typically require several steps with just one click. Like a macro, a Quick Step is essentially a shortcut to complete a procedure or action.

By default, Outlook 2016 includes several preconfigured Quick Steps, all of which are found in the Quick Steps group of the Home tab (while in the Mail workspace):



Clicking on any of these quick steps will execute them.

Below is a breakdown of what each Quick Step will do:

- Move To?: This Quick Step will mark the currently selected e-mail message as read and move it to a designated folder. If you are using this Quick Step for the first time, you will be prompted to set the designated folder.
- **To Manager:** Clicking this Quick Step will forward the currently selected e-mail message to your manager. The first time that you use this Quick Step, you will be prompted to enter the e-mail address that you would like to use.
- Team E-mail: This Quick Step will forward the currently selected e-mail message to all the members of your team. If you are using this Quick Step for the first time, you will be required to add those e-mail addresses.
- Done: Clicking this Quick Step will mark the currently selected e-mail message as read (or complete) and move it to a specified folder. If you are using this Quick Step for the first time, you will be prompted to set the designated folder.
- **Reply & Delete:** This Quick Step is used to reply to a selected e-mail message and delete the original message.
- **Create New**: This option will display the Edit Quick Step dialog box. Here, you can create a new Quick Step from scratch.

#### USING QUICK STEPS

To use a Quick Step, first select the item that you would like to work with. Then, click the Quick Step that you would like to use from the gallery on the Home tab. For example, here the To Manager Quick Step has been selected:

📲 🕈 ÷		Inbox - jsmi	th@acmewidgets.onmicrosoft.co	m - Outlook		
File Home Send / R	teceive Folder View	${\mathbb Q}$ Tell me what you want to do.				
New New Email Items*	Delete Reply Reply Forward	vard I More *	I To Manager →	Move Rules OneNote		
4 Favorites	<			e Move		
Inbox 4 Clutter	All Unread	By Date ▼ Newest ↓	Areply Reply All John Smit	John Smith <abcuidgets@outlool< td=""></abcuidgets@outlool<>		
Sent Items Drafts [2]	John Smith Documents Hey John, Here	John Smith () Documents Thu 10/8/2015 2:13 PM Hey John, Here are the		· -		
✓ jsmith@acmewidgets.or Inbox 4	John Smith Joe's Retirement	John Smith 🛛 🖗 🚭 Joe's Retirement Thu 10/8/2015 12:07 PM Hey John,				

If you are using a Quick Step for the first time, you may need to configure it. In such cases, the First Time Setup dialog box will be displayed. This dialog will appear differently depending on the Quick Step that you select, and will walk you through the setup process:

First Time Setup	?	$\times$
First Time Setup This quick step forwards the currently selected mail message to the people below. Click Options to specify extra text in the subject line or body of the this Quick Step is created, you do not have to enter this information again Mame: To Manager Actions	e specified e message h.	d After
Forward To	<b>F</b>	
<u>O</u> ptions <u>S</u> ave	Ca	incel

### **CREATING QUICK STEPS**

To create your own Quick Step, click the Create New command inside the Quick Steps gallery on the Home tab:

	ా	÷						Inbox - jsmith@ac	mewidgets.onmicro	soft.com
File	н	ome	Send / R	eceive	Folder	View	🖗 Tell me wha	it you want to do		
New Email	New	ا 🚖 ا اکر 🗞	gnore Clean Up <del>+</del> lunk <del>+</del>	X Delete	Reply	Reply Forward	🖳 Meeting	Move to: ? Team Email	← To Manager ✓ Done ✓ Create New	* * •
Ne	W		Delete			Respond		Quid	ck Steps	Gi.

This action will display the Edit Quick Step dialog box. Here, you can give the new Quick Step a name and add the actions that you would like it to perform:

Ed	it Qui	ick Step	?	×
A		Name: My Quick Step tions below that will be performed when this quick step is clicked on.		
	Cho	ose an Action	~	×
-	Cho	ose an Action	6	
	Fili	ng Move to folder		
	6	Copy to folder		
	×	Delete message		
	×	Permanently delete message		
	Cha	inge Status		
	$\square$	Mark as read		
	2	Mark as unread		
	1	Set importance		
	Cat	egories, Tasks and Flags		
		Categorize message		
5		Clear Categories		
I		Flag Message		
		Clear flags on message		
	$\checkmark$	Mark complete		ncel
	151	Crosto a tack with attachment	$\checkmark$	

To add more than one action, click the Add Action button below the "Choose an Action" dropdown menu:

Edit Quick Step		?	×
F Mam	e: Quick Step		
Add actions be	elow that will be performed when this quick step is clicked or	۱.	
Choose an A	ction	~	×
Add Action	here to add another action to this quick step.		
Optional — S <u>h</u> ortcut key:	Choose a shortcut 🗸		
<u>l</u> ooltip text:	This text will show up when the mouse hovers over the quic	k step.	
	F <u>i</u> nish	Car	ncel

An additional menu will be displayed where you can choose the next action that you want the Quick Step to perform. You can repeat this procedure to create up to ten actions for the Quick Step!

When you are done configuring the new Quick Step, click Finish:

Edit Quick Step	?	×
Mark as read		
Add actions below that will be performed when this quick step is clicked or	1.	
🛆 Mark as read	~	×
Set importance	~	×
Importance: High	~	
<u>A</u> dd Action		
Optional Shortcut key: Choose a shortcut  Inis text will show up when the mouse hovers over the quice	k step.	
F <u>i</u> nish	Ca	ncel

Returning to the Outlook 2016 window, you will see the Quick Step that you just created inside the Quick Steps gallery on the Home tab:

Ē	5						Inbox	- jsmith@acmewidget	s.onmicrosoft.com - Out	tlook
File	Ho	me Seno	/ Receive	Folder	View	♀ Tell me wha	t you want to do			
New Email I	New Items •	িল্ল Ignore 🍋 Clean U 🇞 Junk দ	Delete	Reply Re	2 2ply Forwar All	Meeting	<ul> <li>Mark as read</li> <li>Team Email</li> <li>Create New</li> </ul>	Move to: ? ✓ Done	G To Manager G Reply & Delete	+ + 
Nev	w	Del	ete		Respond	d		Quick Steps		5

#### THE MANAGE QUICK STEPS DIALOG BOX

To manage the available Quick Steps, click the More arrow () in the lower right-hand corner of the Quick Steps gallery on the Home tab:

, e	5	÷				inbox -	jsmith@acmewidget	s.onmic	rosoft.co	m - Outlook
File	Ho	me	Send / Receive	Folder View	♀ Tell me wha	it you want to do				
New Email	New Items •	<u>و</u> ا چي) ۲۰ 🎥 ۱۰ 🗞	gnore Clean Up + Delete unk +	Reply Reply Forward All	📴 Meeting	Move to: ? Team Email	G To Manager ✓ Done ⅔ Create New	4 4 4	Move	Rules OneNot
N	ew		Delete	Respond		Ouio	ck Steps	N.		Move

Click the Manage Quick Steps option from the expanded gallery:

Ē	5	÷						Inbox -	jsmith@acmewidget	s.onmi
File	Ho	me	Send / F	Receive	Folder	View	♀ Tell me wha	it you want to do		
New Email	New Items •	ارچ ا کے کھی ار ہے	gnore Clean Up + unk +	X Delete	Reply	Reply Forwar All	Meeting	Move to: ? Team Email	<ul> <li>G To Manager</li> <li>✓ Done</li> <li>✓ Create New</li> </ul>	
Ne	w		Delete			Respond	t	New Quick Step	p	Þ
								🔄 Manage Quick	Steps	

The Manage Quick Steps dialog box will open. On the left-hand side, you will see a list of existing Quick Steps. Clicking on any Quick Step item will display its details in the right-hand side of the dialog box:

Manage Quick Steps		?	Х
Quick step:	Description:		
Move to: ?	Move to: ?		
😋 🛛 To Manager	Actions: Move to folder		
🖃 Team Email	Mark as read		
🗸 Done	S <u>h</u> ortcut key: None		
😋 Reply & Delete	Tooltip: Moves selected e-mail to marking the e-mail as rea	a folder after d.	
	<u>E</u> dit <u>Duplicate</u> <u>D</u> ele	te	
↑ ↓ <u>N</u> ew ▼			
Reset to Defaults	ОК	Can	icel

Below the description, you will find commands to edit, duplicate, or delete the Quick Step. You can also use the commands at the bottom of the Quick Step list to reorder the steps (which affects what steps you see in the gallery) or to create a new Quick Step. Click OK when you are finished making your changes.

#### **RESETTING QUICK STEPS**

To reset Quick Steps, open the Manage Quick Steps dialog and click "Reset to Defaults:"



This action will cause the following warning to be displayed. Click Yes to continue:

Microsoft Outlook	×
Do you want to reset Quick Steps to the default settings? Any chan	ges you have made will be lost.
Yes No	

Any customized Quick Steps will be deleted, and any changes to default Quick Steps will be reversed.

# ACTIVITY 8-2 Creating and Managing Quick Steps

You would like to create a Quick Step that will mark a message as read and give it a lower importance level.

1. To begin, open Microsoft Outlook 2016:

· 聞 ち + ·	Inbox - jsmi	ith@acmewidgets.onmicrosoft.com - Outlook 🛛 🗖 — 🗆 🗙
File Home Send / Receive	Folder View Q Tell me what you want to do	
New	Reply Reply Forward I More- All Respond Qui	C To Manager ↓ Dome ↓ Create New ↓ & Steps r More ↓ Solution ↓ & Steps r More ↓ Solution ↓ ↓ S
∡ Favorites <	Search Current Mailbox (Ctrl 🔎 Current Mailbox 👻	C Reply Reply All C Forward
Inbox 4	All Unread By Date * Newest 4	John Smith <abcwidgets@outlook.com> Jahn Smith @ 1 10/8/2015</abcwidgets@outlook.com>
Sent Items	4 Tomorrow	Documents
Drafts	John Smith U Documents Thu 10/8/2015 2:13 PM Hey John, Here are the	Documents.docx -
✓ jsmith@acmewidgets.onmic Inbox 4	John Smith Joe's Retirement Thu 10/8/2015 12:07 PM Hervall. Joe is going to be	Hey John,
Drafts	4 Today	Here are the documents that you requested for review
Sent Items	John Smith	There are the documents that you requested for review.
Deleted Items 2	Requested Documents 12:39 PM	Thanks,
Clutter	4 Last Week	loa
Conversation History	Microsoft Online Servic	502
Outbox	Your password has bee Tue 9/29 Parchard recet polification	
RSS Feeds		
D Search Folders	There are more items in this folder on the server Click here to view more on Microsoft Exchange	
▷ Groups		
🚬 🔤 🖧 🛄 🚥		

**2.** Start creating a new Quick Step by clicking the Create New option in the Quick Steps gallery on the Home tab:



**3.** The Edit Quick Step dialog box will now be displayed. Inside the Name text box, type "Mark Low Importance:"

Edit Quick Step		?	×
- Mam	e: k Low Importance		
Add actions be	elow that will be performed when this quick step is clicked or	ı.	
Choose an A	ction	~	×
Add Action			
Optional —			
S <u>h</u> ortcut key: <u>T</u> ooltip text:	Choose a shortcut	k step.	
	Finish	Car	ncel

**4.** Next, you need to add an action to this Quick Step. Click the "Choose an Action" dropdown menu and then click "Mark as read:"

t Qu	ick Step	?	
<b>F</b> dd a	Name: Mark Low Importance ctions below that will be performed when this quick step is clicked on.		
ction	is		
Cho	ose an Action	~	
Cho	ose an Action	^	-
Fili	ng		
ъ	Move to folder		
<b>[</b> }	Copy to folder		
×	Delete message		
×	Permanently delete message		
Cha	ange Status		
	Mark as read		
<b>P</b>	Mark as unread		
1	Set importance		
Cat	egories, Tasks and Flags		
	Categorize message		
	Clear Categories		-
	Flag Message		-
	Clear flags on message		
~	Mark complete		
i the	Consta a table with attachment	<b>.</b>	ic)

**5.** Click the Add Action button:

Edit Quick Step	?	×
Add actions below that will be performed when this quick step is clicked on.		
Actions		- 1
🛆 Mark as read	~	×
Add Action		

6. Click the new "Choose an Action" drop-down menu that appears and choose "Set importance:"

dit Qu	ick Step	?	×
Add a	Name: Mark Low Importance ctions below that will be performed when this quick step is clicked on.		
	lark as read	~	×
Cho	ose an Action	~	×
Cho	ose an Action	^	
Fili	ng		
*	Move to folder		
<b>B</b>	Copy to folder		
×	Delete message		
×	Permanently delete message		
Cha	ange Status		
1	Set importance		
Cat	egories, Tasks and Flags		
	Categorize message		
	Clear Categories		_
	Flag Message		
	Clear flags on message		
~	Mark complete		acel
151	Crosta a tack with attachment		icei .

**7.** The "Set importance" action requires more specific criteria to be added. Click the dropdown menu that appears below it and then click "Importance: Low."

Edit Quick Step	?	×
Name:         Mark Low Importance         Add actions below that will be performed when this quick step is clicked on.         Actions		
🖂 Mark as read	~	×
! Set importance	~	×
! Importance: High	~	
Importance: High		
Add IX, Importance: Normal		
↓ Importance: Low		

8. With the new Quick Step now configured, click the Finish button to create it:

puse hovers over the quick step.	
Finish Cancel	j

**9.** Examine the Quick Steps gallery in the Home tab. You will see the Quick Step that you just created:

	5	÷				Inbox - jsmith@acmewidgets.onmicrosoft.com - Outl	ook
File	Ho	me	Send / Receive	Folder View	♀ Tell me wha	t you want to do	
New Email	New Items •	اري الالالا الالالالا	gnore Clean Up + Delete unk +	Reply Reply Forwar	Meeting	<ul> <li><u>Mark Low Impo</u></li> <li><u>Move to:</u> ?</li> <li>Ga To Manager</li> <li>□ Team Email</li> <li>✓ Done</li> <li>♀ Reply &amp; Delete</li> <li>ℱ Create New</li> </ul>	< ▼ <b> </b> ▼
Ne	w		Delete	Respond	d	Quick Steps	Es.

**10.** Click to select any message from your Inbox. Then, click the Mark Low Importance Quick Step from the Quick Steps gallery on the Home tab:

🖺 S 🔻	Inb	ox - jsmith@acmewidgets.onmicrosoft.com - Outlook
File Home Send / Receive	Folder View $Q$ Tell me what you want to do	
New New Email Items ▼	Reply Reply Forward I More +	po ^{&gt;} Move to: ?
New Delete	Respond	Quick Steps
▲ Favorites Inbox 4 Clutter Sent Items	Search Current Mailbox (Ctrl P Current Mailbox All Unread By Date • Newest 4 Tomorrow John Smith	Compared and the set of the
Drafts [2]	Documents Thu 10/8/2015 2:13 PM Hey John, Here are the	Documents.docx 195 KB

**11.** The selected message will be marked as read (if it wasn't already) and its importance will be set to low:



12. Close Microsoft Outlook 2016.

# Summary

During this lesson you learned about the different ways that you can customize the Outlook environment and use Quick Steps to help save you time. You should now be comfortable customizing both the Quick Access toolbar and the ribbon. Additionally, you should be comfortable using the default Quick Steps as well as creating your own.

# **A**PPENDICES

# **Keyboard Shortcut Quick Reference Sheet**

F	Go to the Search field	F3 or Ctrl + E
search	Use Advanced Find	Ctrl + Shift + F
0)	Find a contact	F11
	Go to Mail workspace	Ctrl + 1
aces	Go to Calendar workspace	Ctrl + 2
orksp	Go to People workspace	Ctrl + 3
gle Vo	Go to Tasks workspace	Ctrl + 4
Togg	Go to Notes workspace	Ctrl + 5
	Go to Folder List view	Ctrl + 6
	Send an e-mail message	Alt + S
ment	Go to next message while in Message window	Ctrl + .
	Go to previous message while in Message window	Ctrl + ,
lanag	Flag message for follow-up	Ctrl + Shift + G
age N	Delete item	Ctrl + D
Mess	Print item	Ctrl + P
-	Reply to an e-mail	Ctrl + R
	Reply to all recipients of an e-mail	Ctrl + Shift + R
	Open the Address Book	Ctrl + Shift + B
gu	Apply bold formatting	Ctrl + B
matti	Apply underlining	Ctrl + U
e For	Apply italic formatting	Ctrl + I
essag	Highlight text	Ctrl + Alt + H
Σ	Align text to left	Ctrl + L

	Align text to right	Ctrl + R
	Increase font size	Ctrl + Shift + .
	Decrease font size	Ctrl + Shift + ,
	Create a link	Ctrl + K
	Check spelling	F7
	Undo	Ctrl + Z
	Redo	Ctrl + Y
	Create a new item of the default type for the current workspace	Ctrl + N
	Create a new appointment	Ctrl + Shift + A
ation	Create a new meeting request	Ctrl + Shift + Q
Item Cre	Create a new contact	Ctrl + Shift + C
	Create a new e-mail message	Ctrl + Shift + M
	Create a new task	Ctrl + Shift + K
	Create a new note	Ctrl + Shift + N

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