



Microsoft® Office

Outlook 2010

The Richard Stockton College of New Jersey

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Program Fundamentals

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Welcome to Microsoft Outlook 2010! Microsoft Outlook lets you send and receive e-mail messages, schedule appointments, and organize your contacts and addresses. It also reminds you of tasks you need to complete.

This chapter introduces the Outlook fundamentals. Besides learning how to start and exit the Outlook program, you will learn how to find your way around the Outlook screen and item windows. You will also learn how to use keyboard commands and access Outlook's help features. Let's get started!

Starting Outlook 2010

In order to use a program, you must start—or launch—it first.

Windows Vista and Windows 7

1. Click the Windows **Start** button.

The Start menu appears.

2. Click **All Programs**.

The left pane of the Start menu displays the programs and menus installed on your computer.

3. Click **Microsoft Office**.

4. Select **Microsoft Outlook 2010**.

The Outlook 2010 program screen appears.

! Trap: Depending on how your computer is set up, the procedure for starting Outlook 2010 might be a little different from the steps described here.

✓ Tips

- ü For quicker access, you might consider pinning the Outlook program to the taskbar or Start menu. To do this, right-click **Microsoft Outlook 2010** in the All Programs menu and select **Pin to Taskbar** or **Pin to Start Menu**.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Start the Microsoft Office Outlook 2010 program.

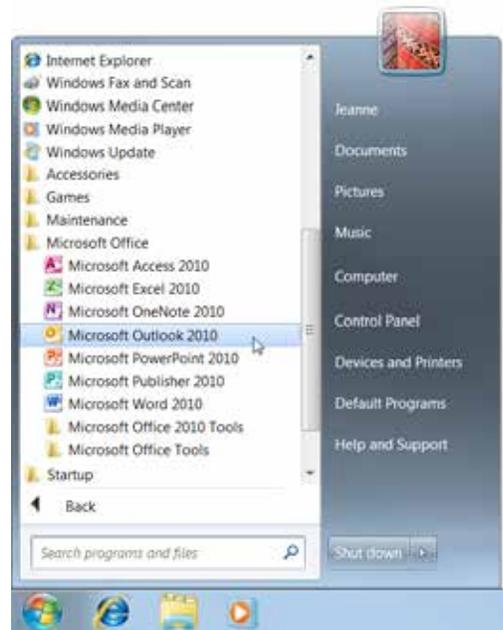


Figure 1-1: The Start menu in Windows 7.

What's New in Outlook 2010

Outlook 2010 offers many new functions and features. Table 1-1: What's New in Outlook 2010 gives you an overview of what to expect.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Review the new features in Microsoft Office Outlook 2010.

Table 1-1: What's New in Outlook 2010

Ribbon	Traditional menus and toolbars have been replaced in Outlook 2010 by the Ribbon, a single mechanism that makes all the commands needed to perform a task readily available.
File tab / Backstage view	The File tab and corresponding Backstage view replace the Office Button and File menu found in previous versions. Here you can access common commands (Open, Print, Save) as well as more advanced ones (Automatic Replies, Mailbox Cleanup, Rules and Alerts).
Quick Steps	Quick Steps allow you to perform multiple tasks with a single click. You can customize the default Quick Steps or create your own.
Conversation View	Conversation View groups related messages together and displays them under a single thread in your Inbox.
Meeting Reply	The Meeting Reply command allows you to reply to an e-mail by scheduling a meeting. When you use the Meeting Reply command to schedule a meeting, all the message recipients are added to a new meeting request in one click.
Mail Tips	If you are using Outlook with Microsoft Exchange 2010, the Mail Tips feature enables you to double-check e-mail messages before you send them. For example, Mail Tips alert you when you are replying to a large distribution list, sending a message without a subject, and more.
Search tab	The Search tab appears on the Ribbon every time you perform a Search, providing instant access to various search-related options.
Outlook Social Connector	The Outlook Social Connector keeps you informed about the activities and status of your personal and professional contacts. The Outlook Social Connector connects to third-party social networking sites and updates Outlook based on those sites.
Zoom Slider	Other Microsoft Office programs have used the Zoom Slider for years, and now it's being included in Outlook. The Zoom Slider allows you to control how much information you see in the Reading Pane of your mailbox and on your Calendar.
Mailbox Cleanup	Mailbox Cleanup makes it easier to access advanced tools to manage your mailbox, empty deleted items, and archive older items. It also includes a visual representation of how much space is left in your mailbox.
People Pane	The People Pane appears at the bottom of the Reading Pane and displays information about the person(s) associated with the selected item. Social media information (if applicable) is displayed for each person, as well as any related files, appointments, or notes.
Ribbon customization	Now you can add/remove tabs, create your own groups, and rearrange commands on the Ribbon.
Quick Contacts	Locate contacts quickly in Outlook 2010 using the Quick Contacts feature. Simply type the first few characters of the contact you want to find in the Find a Contact field on the Ribbon.
Schedule view	View the calendars of everyone in your team simultaneously using Schedule view.
Calendar groups	Keep track of team member schedules by creating a Calendar group. A Calendar group can include multiple people and resources such as conference rooms.
Meeting Suggestions	Outlook 2007 introduced the Meeting Suggestions feature, but it's become more prominent in Outlook 2010. Now, scheduling suggestions will appear in a meeting request whenever you invite someone else to a meeting.
Updated Navigation Pane	The items in the Navigation Pane have been reorganized in Outlook 2010. The most important folders (Inbox, Drafts, Sent Items, Deleted Items) now appear at the top of the list, with all other folders alphabetized beneath it.
Enhanced Unified Messaging features	Unified Messaging features now include Voice Mail preview, protected voice mail, and the ability to define and control how calls are routed.

Table 1-1: What's New in Outlook 2010

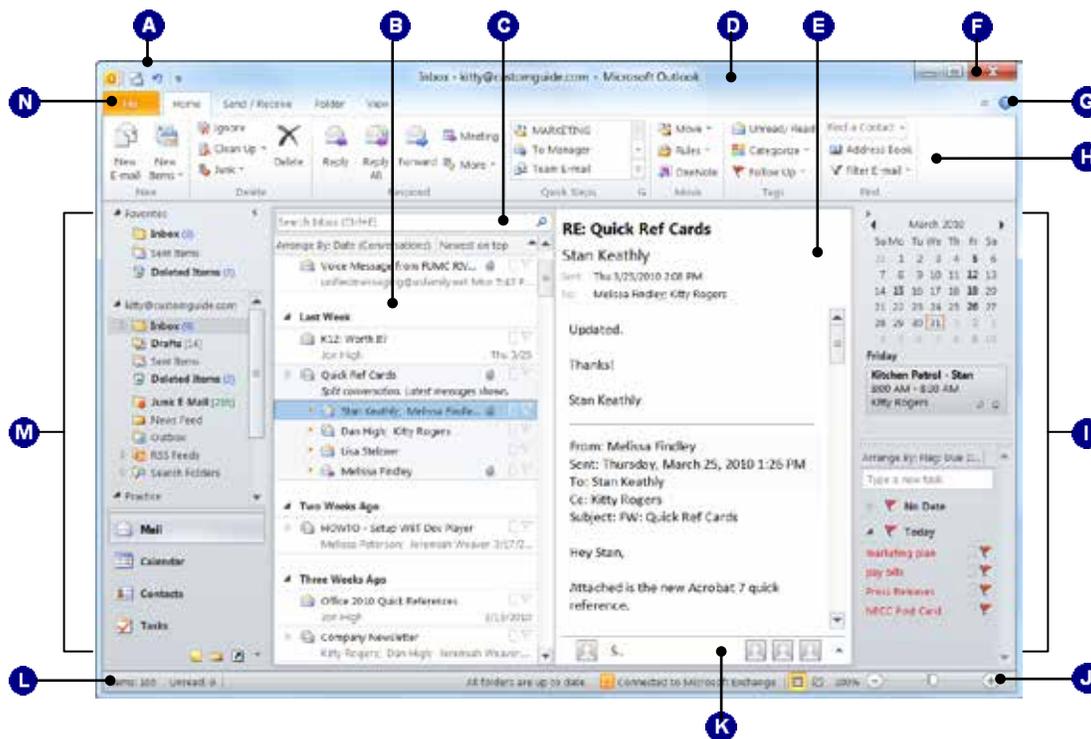
To-Do Bar updates	The appearance of the To-Do bar has been improved in Outlook 2010. The To-Do bar now provides better access to all-day appointments and events. There are also updated visual indicators for conflicts and unanswered meeting requests and day separators. Finally, it is easier to resize the To-Do bar in Outlook 2010.
Better Proofing Tools	If you change one of several spelling checker options in one Office program, that option is now updated in all the programs. Also, the Outlook 2010 spell checker can now recognize some contextual spelling errors—for example, the use of “their” vs. “there”.
Word E-mail Editor	The Microsoft Word program is now Outlook’s only e-mail text editor. You can no longer turn it off and use a native Outlook editor.
Include Screenshots	Outlook 2010 makes it easier than ever to include a screenshot of your computer screen in an e-mail. You can take a screenshot of your whole screen, or you can clip the screen and include the screen clip in an e-mail.

Understanding the Outlook 2010 Program Screen

The Outlook 2010 program screen may seem confusing and overwhelming at first. This lesson will help you become familiar with it.

& Exercise Notes

- **Exercise File:** None required.
- **Exercise:** Familiarize yourself with the different parts of the Outlook 2010 program screen.



<p>A Quick Access Toolbar: Contains common commands such as Send/Receive and Undo. You can add and remove commands as desired.</p>	<p>H Ribbon: The tabs on the Ribbon replace the menus and toolbars found in previous versions of Outlook.</p>
<p>B Inbox: Lists all of your e-mail messages and can be arranged according to your specifications.</p>	<p>I To-Do Bar: Keep tabs on your calendar, appointments, and tasks all in one place. The To-Do Bar can also be displayed in a minimized format.</p>
<p>C Instant Search: Enter key words to search the current folder or location. Displays results in real-time results appear as you enter each search term</p>	<p>J Zoom Slider: Click and drag the slider to zoom in or out of an item or view. You can also use the + and – buttons.</p>
<p>D Title bar: Displays the name of the program you are currently using (Outlook) and the item you are currently working with.</p>	<p>K People Pane: Displays information regarding the person(s) associated with the selected item.</p>
<p>E Reading Pane: Displays the contents of the selected message.</p>	<p>L Status bar: Displays information and reminders about Outlook items. Right-click the status bar to specify what information is shown.</p>
<p>F Close button: Click here to exit the Outlook program.</p>	<p>M Navigation Pane: Contains buttons and icons you can click to move among Outlook’s folders and tools.</p>
<p>G Help button: Click here to open the Outlook Help window.</p>	<p>N File tab: Click here to access common commands (Open, Print, Save) as well as more advanced ones (Automatic Replies, Mailbox Cleanup, Rules and Alerts).</p>

Understanding Items

In Outlook, an item is the basic element that holds information. Items are used to send and view e-mails, and also to organize information like tasks and contacts.

Table 1-2: Outlook Items provides an overview of the items used in Outlook.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Explore and understand the various types of items available in Outlook 2010.

Table 1-2: Outlook Items

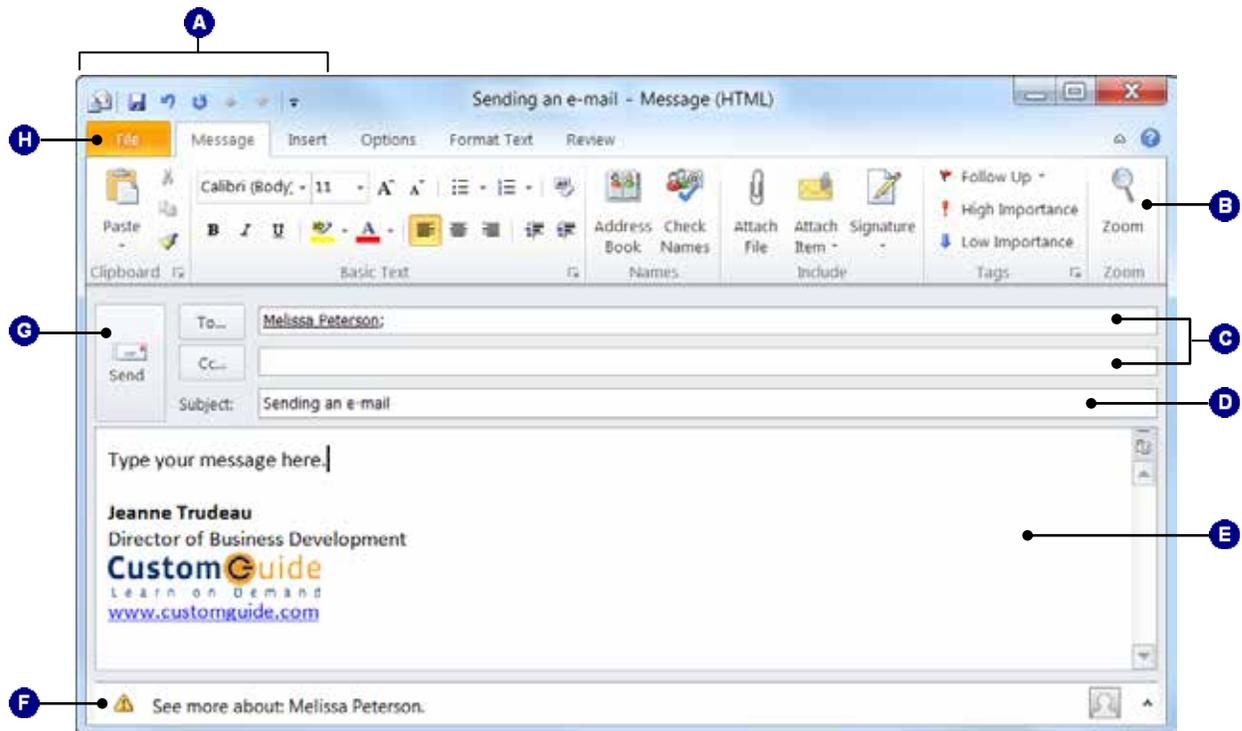
	Mail Message	Compose a message to be sent by e-mail.
	Appointment	Add an appointment to your calendar.
	Meeting Request	Set up an appointment to which you invite other people or reserve resources such as a conference room.
	Contact	Enter information about a person including their name, company, job title, and e-mail address.
	Contact Group	Create a collection of contacts that allows you to quickly send mass e-mails.
	Task	Enter to-do items that can be tracked until completion.
	Task Request	Inform someone else of a task you would like them to perform.
	Journal Entry	Keep track of interactions and files that you create—such as e-mails or Word documents—in a timeline view.
	Note	Jot something quickly in a note. Can be sorted using color categories.

Understanding the Message Window

The mail message window, like the program window, features the Ribbon in place of menus and toolbars. This lesson will help you become familiar with the basic features of the message window.

& Exercise Notes

- **Exercise File:** None required.
- **Exercise:** Familiarize yourself with the different parts of the Outlook 2010 message window.



<p>A</p>	<p>Quick Access Toolbar: The Quick Access Toolbar contains common commands such as Save and Undo. You can add or remove commands as desired.</p>	<p>E</p>	<p>Message Area: Type your e-mail message here as you would using a word processor.</p>
<p>B</p>	<p>Ribbon: The Ribbon makes commands easily accessible instead of hiding them under menus and toolbars.</p>	<p>F</p>	<p>People Pane: Displays information about the person(s) associated with the message.</p>
<p>C</p>	<p>Recipients: Enter the e-mail addresses of recipients in the To field. Use the CC field to send a copy of the message to recipients who are not directly involved, but might be interested in the message.</p>	<p>G</p>	<p>Send button: Once you've finished composing your message, click the Send button to send it.</p>
<p>D</p>	<p>Subject line: Enter a title here so that recipients quickly know the reason for your e-mail.</p>	<p>H</p>	<p>File tab: Click here to access common commands (Save, Print) as well as more advanced ones (Permissions, Properties).</p>

Giving Commands in Outlook

Outlook 2010 provides easy access to commands through the Ribbon, the File tab, and the Quick Access Toolbar.

Ribbon

The Ribbon replaces the menus and toolbars found in previous versions of Outlook. The Ribbon keeps commands visible while you work instead of hiding them under menus or toolbars.

The Ribbon is made up of three basic components:

- **Tabs:** Commands are organized into *tabs* on the Ribbon. See Table 1-3: *Tabs on the Ribbon* for a description of the different types of tabs.
- **Groups:** The commands found on each tab are organized into *groups* of related commands. Click the **Dialog Box Launcher** (☰) in the bottom-right corner of a group to display even more commands.
- **Buttons:** To issue a command, click its *button* on the Ribbon.

✓ Tips

- ü The Ribbon shrinks or expands depending on your screen resolution and the size of the program window.
- ü You can hide the Ribbon so that only tab names appear, giving you more room in the program window. To do this, click the **Minimize the Ribbon** button (☰), or press <Ctrl> + <F1>, or double-click the currently displayed command tab. To display the Ribbon again, repeat any of these methods.

File tab

The *File tab* and corresponding Backstage View replace the Office Button and File menu found in previous versions of Outlook. Here you can access common commands (Open, Print, Save) as well as more advanced ones (Automatic Replies, Mailbox Cleanup, Rules and Alerts).

✓ Tips

- ü The File tab replaces the File menu/Office Button found in previous versions of Outlook.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Click each tab on the Ribbon to view its commands. Click the File tab to view Backstage view.

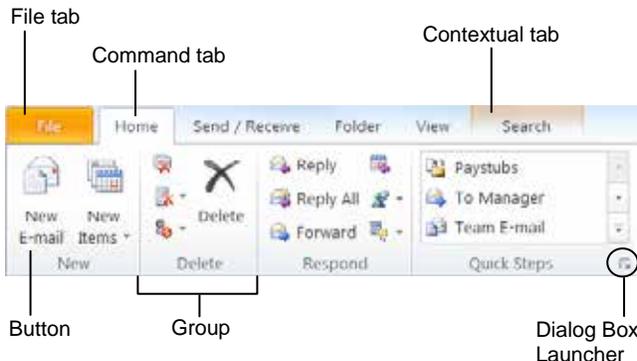


Figure 1-2: Elements of the Ribbon.

Table 1-3: Tabs on the Ribbon

Command Tabs	Command tabs appear by default whenever you open the Outlook program. In Outlook 2010, the Home, Send/Receive, Folder, and View tabs appear by default.
Contextual Tabs	Contextual tabs appear whenever you perform a specific task and offer commands relative to only that task. For example, whenever you begin a search, the Search tab appears on the Ribbon.

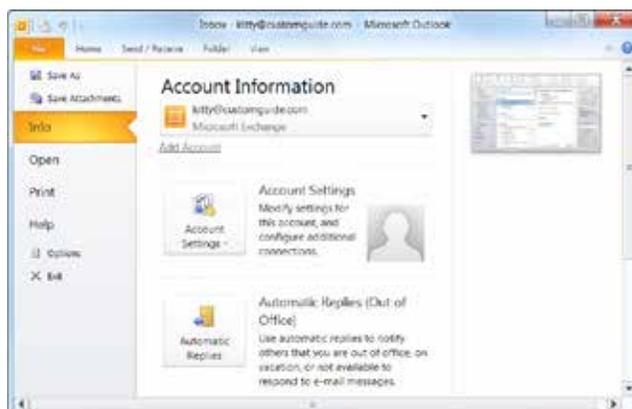


Figure 1-3: The File tab and resulting Backstage View.

Quick Access Toolbar

The *Quick Access Toolbar* appears above the File tab and provides easy access to the commands you use most frequently. The Send/Receive and Undo buttons appear on the toolbar by default; however, you can customize this toolbar to meet your needs by adding or removing buttons. To customize the Quick Access Toolbar:

1. Click the **Customize Quick Access Toolbar** button at the end of the Quick Access Toolbar.

A list of commands appears.

2. Select the command(s) you want to add or remove.

✔ Tips

- ü You can change where the Quick Access Toolbar appears in the program window. To do this, click the **Customize Quick Access Toolbar** button at the end of the Quick Access Toolbar. Select **Show Below the Ribbon** or **Show Above the Ribbon**, depending on the toolbar's current location.

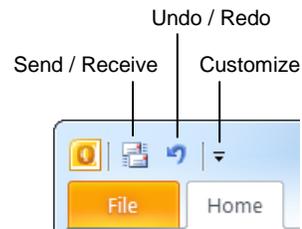


Figure 1-4: The Quick Access Toolbar.

Using Command Shortcuts

Command shortcuts can be used as an alternative to the Ribbon. This lesson describes four different shortcuts, each designed to save time and increase efficiency.

Keystroke shortcuts

Without a doubt, *keystroke shortcuts* are the fastest way to give commands in Outlook. They're especially great for issuing common commands, such as creating a new mail message.

In order to issue a command using a keystroke shortcut, you simply press a combination of keys on your keyboard. For example, rather than clicking the New button on the Ribbon to create a new e-mail, you could press and hold the keystroke shortcut, <Ctrl> + <N>.

Table 1-4: Common Keystroke Shortcuts provides an overview of commonly used keystroke shortcuts.

Contextual menus

A *contextual menu* displays a list of commands related to a specific object or area. To open a contextual menu:

1. Right-click an object or area in the item window or program screen.
A contextual menu appears, displaying commands that are relevant to the object or area you clicked.
2. Select an option from the contextual menu, or click anywhere outside the contextual menu to close it without selecting anything.

Mini Toolbar

The Mini Toolbar appears when you select text in a new item window and contains common text formatting commands. To view the Mini Toolbar:

1. Select text in an item window.
The Mini Toolbar appears near the text you selected.
Trap: Sometimes the Mini Toolbar can be hard to see due to its transparency. To make the Mini Toolbar more visible, point to it.
2. Click the desired command on the Mini Toolbar or click anywhere outside the Mini Toolbar to close it.
Tip: If you don't want the Mini Toolbar to appear every time, click the **File** tab and select **Options**. Click the **General** tab, uncheck the **Show Mini Toolbar on selection** check box, and click **OK**.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Memorize some common keystroke shortcuts. Right-click a message in the Inbox to display its contextual menu.

Table 1-4: Common Keystroke Shortcuts

<Ctrl> + <O>	Opens the selected item.
<Ctrl> + <N>	Creates a new item.
<Ctrl> + <S>	Saves the currently opened item.
<Ctrl> + <P>	Prints the selected item.
<Ctrl> + 	Toggles bold font formatting.
<Ctrl> + <I>	Toggles italic font formatting.
<Ctrl> + <C>	Copies the selected text or object.
<Ctrl> + <X>	Cuts the selected text or object.
<Ctrl> + <V>	Pastes the selected text or object.

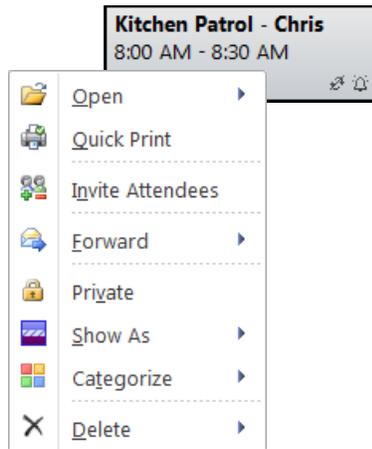


Figure 1-5: A contextual menu.



Figure 1-6: The Mini Toolbar.

Key Tips

Key Tips appear whenever you press the <Alt> key. You can use Key Tips to perform just about any action in Outlook without ever having to use the mouse. To issue a command using a Key Tip:

1. Press the <Alt> key.
Tiny letters and/or numbers, called *badges*, appear on the Quick Access Toolbar and all of the tabs on the Ribbon.
2. Depending on the tab or command you want to select, press the letter or number key indicated on the badge.
3. Repeat this step as necessary until the desired command has been issued.



Figure 1-7: Press the <Alt> key to display Key Tips.

Using the Navigation Pane

Outlook is made up of several panes, each with its own set of tools and folders. You can switch between these panes using the Navigation Pane.

Switch between panes

The Mail pane appears by default whenever you start Outlook. To switch to another pane, such as Calendar or Contacts, use the buttons in the Navigation Pane.

- Click the Navigation Pane button for the pane that you want to open.

The selected pane appears.

Other Ways to Switch Panes:

Use the shortcuts listed in Table 1-5: Navigation Pane Shortcuts.

Customize the Navigation Pane

You can customize the Navigation Pane to display only the information you want.

- Click the **Configure buttons** button in the bottom-right corner of the Navigation Pane.

A list of options appears:

- Show More/Show Fewer Buttons:** Select one of these options to quickly add/remove buttons.
- Navigation Pane Options:** Select this option to change the order of buttons in the Navigation Pane.
- Add or Remove Buttons:** Select this option to choose which buttons appear in the Navigation Pane.

- Select the desired option and, if necessary, specify the appropriate settings.

Tips

- To minimize or expand the Navigation Pane, click the **Minimize/Expand the Navigation Pane** button in the upper-right corner of the Navigation Pane; or click the **View** tab on the Ribbon, click the **Navigation Pane** button in the Layout group, and select an option from the list; or press **<Alt> + <F1>**.
- To turn off the Navigation Pane, click the **View** tab on the Ribbon, click the **Navigation Pane** button in the Layout group, and select **Off** from the list; or press **<Alt> + <F1>**.

& Exercise

- Exercise File:** None required.
- Exercise:** Display and explore the Calendar, Contacts, and Tasks panes, one at a time. Then return to the Mail pane.

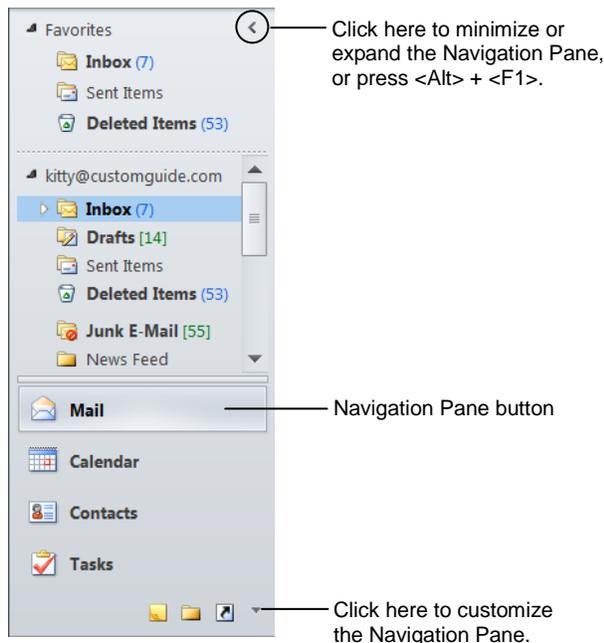


Figure 1-8: The Navigation Pane with the Mail pane displayed.

Table 1-5: Navigation Pane Shortcuts*

Mail	<Ctrl> + <1>
Calendar	<Ctrl> + <2>
Contacts	<Ctrl> + <3>
Tasks	<Ctrl> + <4>
Notes	<Ctrl> + <5>
Folder List	<Ctrl> + <6>
Shortcuts	<Ctrl> + <7>

*These shortcuts are based on the order in which buttons are displayed in the Navigation Pane. If you have changed the order of the buttons in the Navigation Pane, the shortcuts will change, too.

Table 1-6: The Navigation Pane

	 Mail	Compose, manage, organize, send, and receive messages.
Favorite Folders	 Inbox	Contains all of your incoming e-mail messages.
	 Sent Items	Stores copies of messages you have sent.
	 Deleted Items	Works like the Windows Recycle Bin; where you can find deleted Outlook items.
All Mail Folders	n/a Mailbox	Provides a preview of your day; summarizes appointments, tasks, and new e-mail messages.
	 Drafts	Stores draft messages that you haven't yet completed.
	 Junk E-mail	Contains messages that Outlook considers spam. You should check this folder periodically to check for incorrectly flagged messages.
	 News Feed	Collects status and activity updates for people who are a part of your social network using Outlook's Social Connector.
	 Outbox	Temporarily stores any messages that you've composed that have not been sent.
	 RSS Feeds	Allows you to access content that you've subscribed to via RSS feed, such as news and blogs.
	 Search Folders	Provides quick access to color categorized messages, messages flagged for follow-up, messages with large attachments, and unread messages.
	 Calendar	Enables you to view and schedule appointments, events, and meetings.
	 Contacts	Stores addresses, numbers, e-mail addresses, and other information about people you contact.
	 Tasks	Allows you to organize and manage to-do items.
	 Notes	Works like electronic sticky notes; allows you to jot down quick bits of information.
	 Folder List	Displays all the folders in Microsoft Outlook.
	 Shortcuts	Contains shortcuts (that you add yourself) to other folders, such as the My Documents folder.
	 Configure buttons	Allows you to add or remove buttons from the Navigation Pane.
	 Journal	Records information about items you send or receive and files you create (not shown by default).

Using the Reading Pane

You can preview a message without having to open it using the Reading Pane. By default, the Reading Pane appears to the right of the Inbox, but you can move the Reading Pane to another position in the window.

1. Click the **View** tab on the Ribbon and click the **Reading Pane** button in the Layout group.

There are a few different ways to view the Reading Pane:

- **Right:** Display the Pane to the right of the Inbox (default setting).
- **Bottom:** Display the Pane below the Inbox.
- **Off:** Hide the Pane.

2. Select the position you want to use.

The Reading Pane is positioned accordingly.

✓ Tips

- ü Typically, the Mail folder is the only folder in which the Reading Pane is used extensively.
- ü You can view messages safely in the Reading Pane—potentially malicious scripts or attachments are not activated or opened automatically.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Position the Reading Pane below the Inbox. Hide the Reading Pane. Position the Reading Pane to the right of the Inbox.

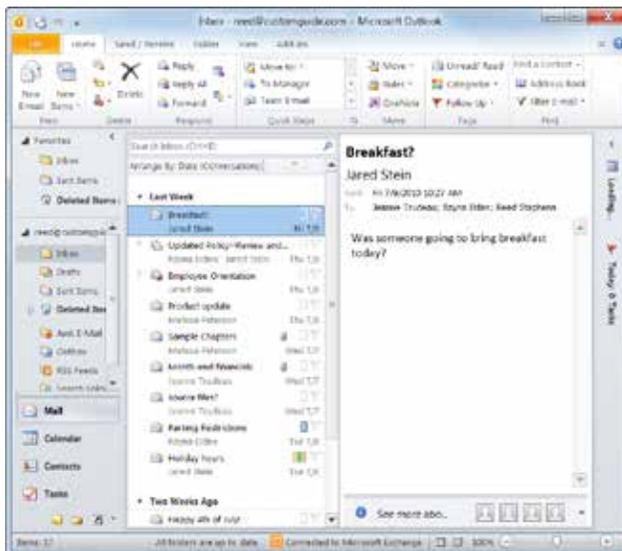


Figure 1-10: Reading Pane displayed to the right of the Inbox.

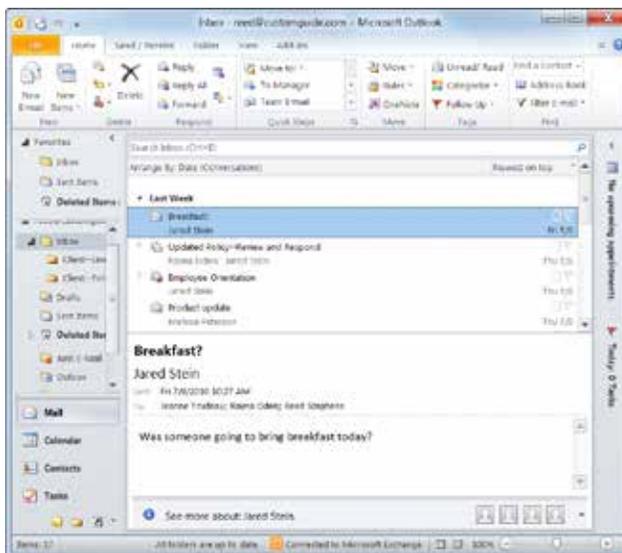


Figure 1-9: Reading Pane displayed below the Inbox.

Using the To-Do Bar

The To-Do Bar makes it easy to keep track of your appointments, events, and tasks no matter where you are in Outlook.

Minimize the To-Do Bar

The To-Do Bar appears expanded by default, but you can minimize it to free up space in the program window.

- Click the **View** tab on the Ribbon, click the **To-Do Bar** button in the Layout group, and select **Minimized** from the list.

The To-Do Bar appears minimized.

- Other Ways to Minimize the To-Do Bar:** Click the **Minimize the To-Do Bar** button in the upper-left corner of the To-Do Bar.

Customize the To-Do Bar

In Outlook 2010 you can specify how much information is displayed on the To-Do Bar.

- Click the **View** tab on the Ribbon and click the **To-Do Bar** button in the Layout group.

A list of items appears.

- Click the item you want to show/hide.

- Other Ways to Customize the To-Do Bar:** Click the **View** tab on the Ribbon, click the **To-Do Bar** button in the Layout group, and select **Options**.

Tips

- To turn off the To-Do Bar, click the **View** tab on the Ribbon, click the **To-Do Bar** button in the Layout group, and select **Off** from the list.
- To jump to a specific date in the Calendar, click it in the Date Navigator on the To-Do Bar.

& Exercise

- Exercise File:** None required.
- Exercise:** Expand the To-Do Bar, then minimize it again.

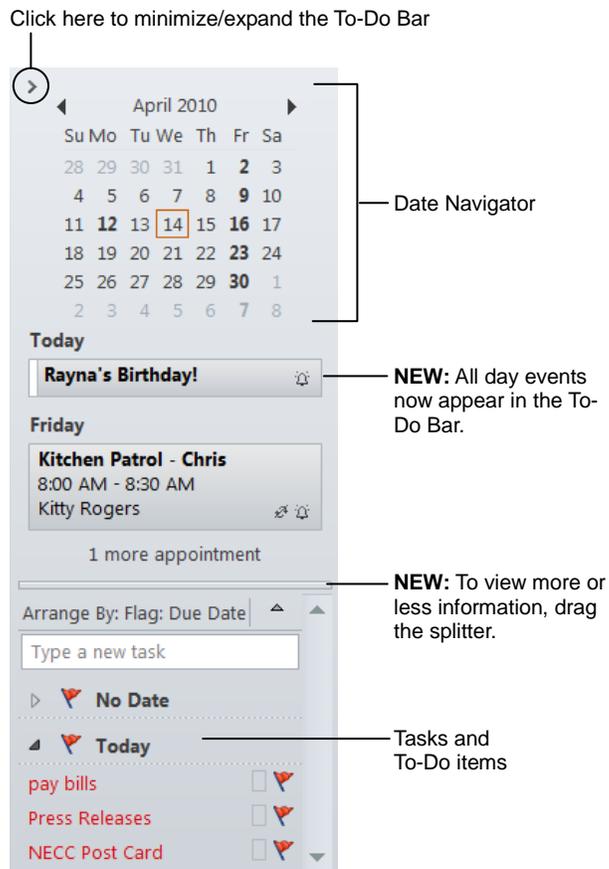


Figure 1-11: The To-Do Bar.

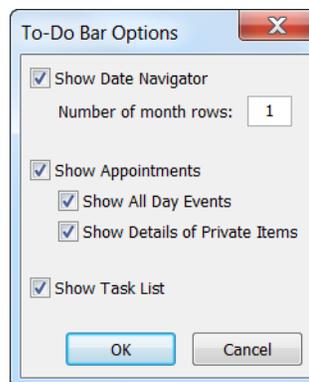


Figure 1-12: You can further customize the To-Do Bar using the To-Do Bar Options dialog box.

Using Help

When you don't know how to do something in Outlook 2010, look up your question in the Outlook Help files. The Help files can answer your questions and offer tips about Outlook's features.

Search for help

1. Click the **Microsoft Outlook Help** button (🔍) on the Ribbon.

The Outlook Help window appears.

- 🔍 **Other Ways to Open the Help window:**
Press <F1>.

2. Type what you want to search for in the **Type words to search for** box and press <Enter>.

A list of help topics appears.

3. Click the topic that best matches what you're looking for.

Outlook displays information regarding the selected topic.

Browse for help

1. Click the **Microsoft Outlook Help** button (🔍) on the Ribbon.

The Outlook Help window appears.

- 🔍 **Other Ways to Open the Help Window:**
Press <F1>.

2. Click the category that you want to browse.

The topics within the selected category appear.

3. Click the topic that best matches what you're looking for.

Outlook displays information regarding the selected topic.

Choose the Help source

If you are connected to the Internet, Outlook Help retrieves its contents from the Office Online database by default. You can easily change this to meet your needs.

1. Click the **Search** button list arrow in the Outlook Help window.

A list of help sources appears.

2. Select an option from the list.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Search the phrase "create a new message". Browse topics in the "What's new" category of Help.

Change the help source to the Outlook Help section under Content from this computer and search the term "create a new message" again.

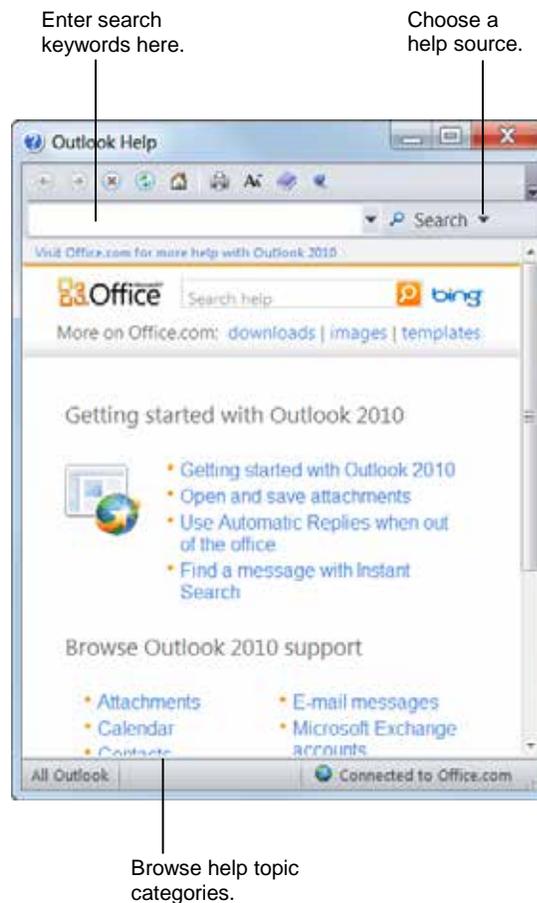


Figure 1-13: The Outlook Help window.

✔ Tips

- ü When a standard search returns too many results, try searching offline to narrow things down a bit.
- ü Office 2010 offers enhanced ScreenTips for many buttons on the Ribbon. You can use these ScreenTips to learn more about what a button does and, where available, view a keystroke shortcut for the command. To view a command's ScreenTip, point to the command on the Ribbon.
- ü Most dialog boxes have a **Help** button () in the upper right-hand corner. Click this button to open the Outlook Help window.

Table 1-7: Help Buttons

	Back	Click here to move back to the previous help topic.
	Forward	Click here to move forward to the next help topic.
	Stop	If a topic is taking too long to load, click here.
	Refresh	Refresh the page to correct page layout or get the latest data.
	Home	Click here to return to the Help home page.
	Print	Click here to print the current help topic.
	Change Font Size	Click here to change the size of the text in the Help window.
	Show Table of Contents	Click here to browse for help using the Table of Contents.
	Keep On Top/Not on Top	Click here to layer the Help window so that it appears behind or in front of all other Microsoft Office programs.

Exiting Outlook 2010

When you're finished using Outlook 2010, you should exit it. Exiting a program closes it until you need to use it again.

- Click the **File** tab on the Ribbon and select **Exit**.

The Outlook program closes.

Other Ways to Exit Outlook:

Click the **Close** button on the title bar. Or, double-click the **Outlook** icon on the left-hand side of the title bar. Or, press **<Alt> + <F4>**.

Tips

- ü Having many programs open at the same time can slow down your computer, so it's a good idea to exit programs that aren't being used.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Exit the Microsoft Outlook 2010 program.

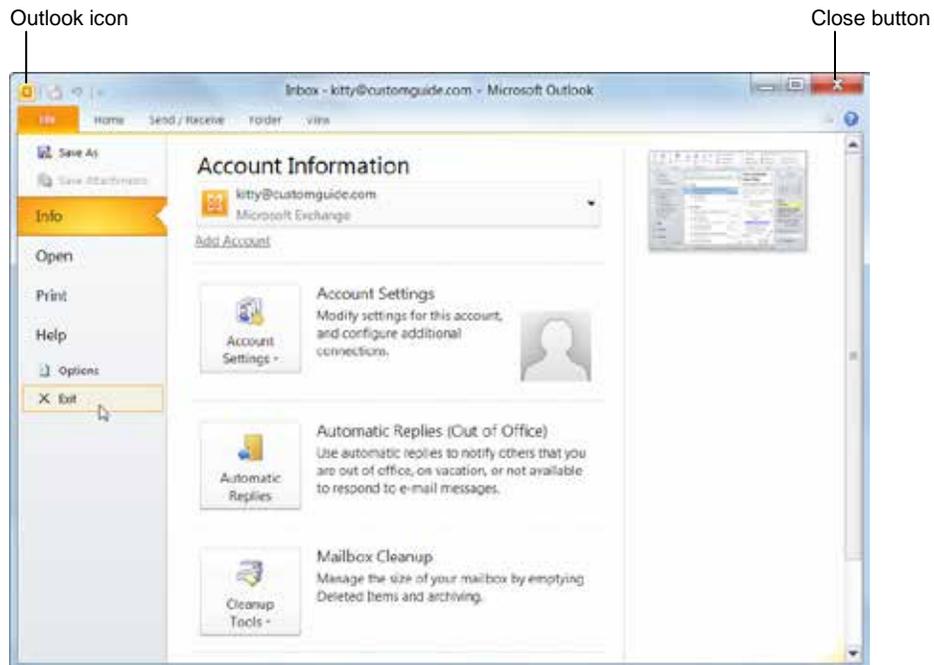


Figure 1-14: Exiting Outlook.

Program Fundamentals Review

Quiz Questions

1. Outlook automatically opens with Windows. (True or False?)
2. Which of the following is NOT a new feature in Outlook 2010?
 - A. The Ribbon
 - B. Microsoft Online help
 - C. Conversation View
 - D. Mail Tips
3. What is the Inbox?
 - A. A folder that displays e-mail messages you have sent.
 - B. A place where you can view your tasks.
 - C. A pane used for viewing the complete text of e-mail messages.
 - D. A folder that displays your incoming e-mail messages.
4. Which of the following is NOT an item found in Outlook?
 - A. Mail Message
 - B. Worksheet
 - C. Appointment
 - D. Contact
5. What is the Ribbon?
 - A. A string of code that enables XML compatibility.
 - B. The path name that refers to where a command is located in the program.
 - C. Another name for the title bar.
 - D. The command center that replaces the menus and toolbars found in item windows in previous versions of Outlook.
6. The Ribbon can be hidden so that only tab names appear. (True or False?)
7. The File tab contains basic file commands. (True or False?)
8. What is the Quick Access Toolbar?
 - A. There are no toolbars in Outlook 2010.
 - B. What appears when you select text in an item window.
 - C. A customizable toolbar of common commands that appears above or below the Ribbon.
 - D. An extension of the Windows taskbar.
9. Which of the following is NOT a command keystroke shortcut in Outlook?
 - A. <Ctrl> + <N>
 - B. <Ctrl> + <O>
 - C. <Ctrl> + <P>
 - D. <Ctrl> + <Alt> + <Delete>

10. Which of the following is NOT a Navigation Pane button?
 - A. Mail
 - B. Contacts
 - C. Calendar
 - D. To-Do

11. The Reading Pane can only be viewed on the right side of the program window. (True or False?)

12. Which of these is NOT an element you can add or remove from the To-Do Bar?
 - A. Date Navigator
 - B. Appointments
 - C. Task List
 - D. Saved Drafts

13. What key can you press to get help in Outlook?
 - A. <Esc>
 - B. <Ctrl> + <H>
 - C. <F1>
 - D. <F11>

14. Which of the following is NOT a way to exit Outlook 2010?
 - A. Press <Alt> + <F5>.
 - B. Click the Close button in the upper-right corner of the program window.
 - C. Click File on the menu bar and select Exit.
 - D. Double-click the Outlook icon on the title bar.

Quiz Answers

1. False. You must start Outlook to begin using it.
2. B. Microsoft Online help is not a new feature in Outlook 2010.
3. D. The Inbox is a folder that displays your incoming e-mail messages.
4. B. A worksheet is not an item found in Outlook
5. D. The Ribbon is the command center that replaces the menus and toolbars found in item windows in previous versions of Outlook.
6. True. Double-click a tab to hide the Ribbon, then double-click any tab to view commands once again.
7. True. The File tab contains basic file commands, similar to the File menu of previous versions.
8. C. The Quick Access Toolbar is a customizable toolbar of common commands that appears above or below the Ribbon.
9. D. <Ctrl> + <Alt> + <Delete> is a Windows command, not an Outlook command.
10. D. To-Do is not a Navigation Pane button.

11. False. The Reading Pane can be viewed at the bottom of the window, or turned off altogether.
12. D. Saved drafts are not something you can view in the To-Do Bar.
13. C. Press <F1> to access help in Outlook.
14. A. To exit Outlook, you need to press <Alt> + <F4> not <Alt> + <F5>.

Composing and Sending E-mail

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This chapter covers two of the most-used functions in Microsoft Outlook: How to compose and send an e-mail message.

The steps involved in composing and sending a message are pretty basic, but there's quite a bit you can do in between these processes to maximize the effect that your messages have. This chapter will show you how to insert a signature, attach a file to a message, and more.

Using Exercise Files

This chapter suggests exercises to practice the topic of each lesson. There are two ways you may follow along with the exercise files:

- Open the exercise file for a lesson, perform the lesson exercise, and close the exercise file.
- Open the exercise file for a lesson, perform the lesson exercise, and keep the file open to perform the remaining lesson exercises for the chapter.

The exercises are written so that you may “build upon them”, meaning the exercises in a chapter can be performed in succession from the first lesson to the last.

Composing and Sending an E-mail Message

This lesson explains how to perform the most basic e-mail task of all: how to compose and send an e-mail message.

1. Click the **Mail** button in the Navigation Pane.
The Inbox appears.
2. Click the **Home** tab on the Ribbon and click the **New E-mail** button in the New group.

An Untitled – Message window appears.

Other Ways to Create a New Message:
Press <Ctrl> + <N>, or right-click the **Outlook** button on the taskbar and select **New E-mail Message** from the Jump List.

3. Enter the recipient’s e-mail address in the **To**, **Cc** and/or **Bcc** field(s).

See the table below, *Ways to Address an E-mail Message* for a description of each field.

If you want to send the message to more than one person, insert a semicolon (;) between each recipient’s e-mail address—for example, JohnH@acme.com; BettyT@yahoo.com.

Other Ways to Enter a Recipient’s Address:
Click the **To**, **Cc**, or **Bcc** button, select the name of the recipient or distribution list you want to use from the Address Book, and click the **To**, **Cc**, or **Bcc** button. Click **OK** when you’re finished.

Trap: If you can’t find the contact or distribution list you want to use in the Select Names dialog box, you may need to click the **Address Book** list arrow at the top of the Select Names dialog box and select a different Address Book.

Table 2-1: Ways to Address an E-mail Message

To	Sends the message to the recipient you specify.
Carbon Copy (Cc)	Sends a copy of the message to a recipient who is not directly involved, but who might be interested in the message.
Blind Carbon Copy (Bcc)	Sends a copy of the message to a recipient without any other recipients knowing. This option is useful when you are sending a message to many recipients at once. To display the Bcc field, click the Options tab on the Ribbon and click the Bcc button in the Show Fields group.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Compose a new e-mail message, entering your own e-mail address in the To field and “FYI” in the Subject field.

Type “Today I learned how to compose and send an e-mail message.” in the message body area.

Send the message.



Figure 2-1: The Untitled – Message window.

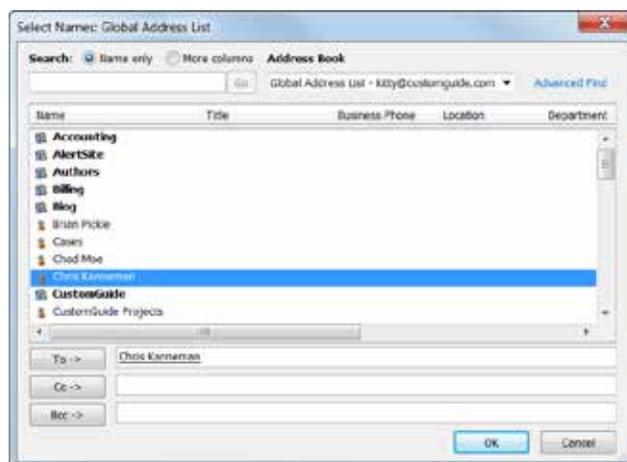


Figure 2-2: If you don’t know a recipient’s e-mail address, but he or she is located in your Address Book, click the To, Cc, or Bcc button to open the Select Names dialog box.

Composing and Sending E-mail

4. Type the subject of the e-mail in the **Subject** field.

The Subject field lets your recipients know what the message is about.

5. Click inside the body area of the message window and type your message.

Ask yourself the following questions before sending:

- Have you entered the correct e-mail address(es) in the To field?
- Have you entered an appropriate subject in the Subject field?
- Did you read through your message to make sure it's correct?

If you answered “Yes” to all of the above questions...

6. Click the **Send** button in the Message window.

Your message is released into cyberspace and on its way to the specified recipient(s).

 **Other Ways to Send a Message:**

Press <Alt> + <S>.

Send button

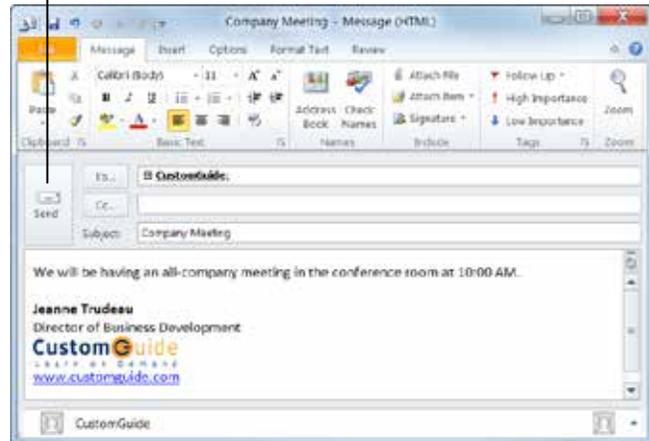


Figure 2-3: When you're ready to send the message, click the Send button.

Specifying Message Options

Just like you can assign parcel insurance or specify overnight delivery for letters and packages, Outlook lets you specify options for your e-mail messages. You can mark messages as urgent, specify a read receipt for all messages, or request that your messages be encoded so that they can only be read by the intended recipient(s).

Set message priority

If the intended recipient of a message receives a lot of e-mail throughout the day, specify your message as important so that it will stand out in his or her Inbox.

1. In the Message window, click the **Message** tab on the Ribbon.
2. Click the **High Importance** or **Low Importance** button in the Tags group.
 - **High Importance:** Inserts a red exclamation point next to the message subject.
 - **Low Importance:** Inserts a blue, downward-pointing arrow next to the message subject.

The specified priority is assigned to the message.

- **Other Ways to Set Message Priority:** Click the **Message** tab on the Ribbon and click the **Dialog Box Launcher** in the Tags group. Under Settings, click the **Importance** list arrow and select an option from the list. Click **Close**.

Request a read or delivery receipt

If you feel like your messages are being ignored, try requesting a read receipt. That way, you can track when a recipient receives and reads the message.

- **Trap:** Read receipts only work if your recipient's e-mail program supports them.

1. In the Message window, click the **Options** tab on the Ribbon.
 2. Select **Request a Delivery Receipt** and/or **Request a Read Receipt** in the Tracking group.
 - **Request a Delivery Receipt:** Sends a notification when the message has been successfully delivered.
 - **Request a Read Receipt:** Sends a notification when the recipient has opened the message.
- **Tip:** Don't rely too heavily on read receipts; the recipient has the option to deny returning a receipt.

& Exercise

- **Exercise File:** A new e-mail message.
- **Exercise:** Assign high priority to the message.

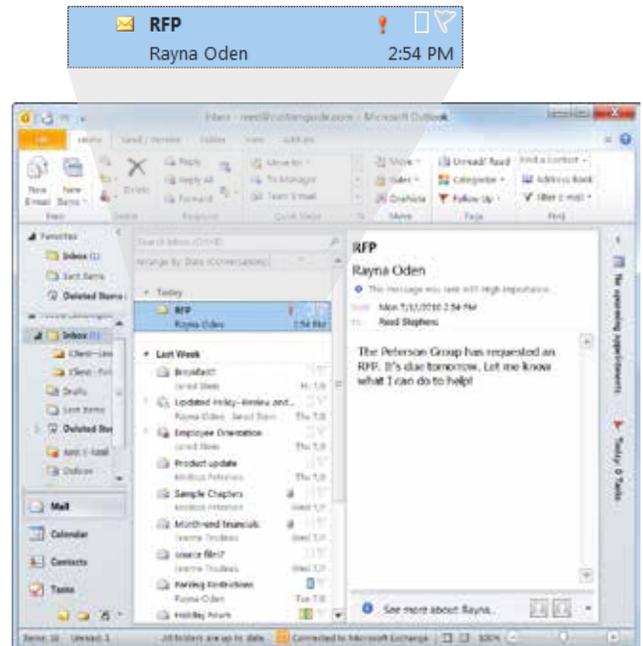


Figure 2-4: A message that has been assigned high priority has a red exclamation point next to it when it is received.



Figure 2-5: This dialog box appears when a message with a read receipt is opened.

- Other Ways to Request Receipts:**
 Click the **Options** tab on the Ribbon and click the **Dialog Box Launcher** in the Tracking group. Under Voting and Tracking options, select **Request a delivery receipt for this message**, **Request a read receipt for this message**, or both. Click **Close** when you're finished.

Other Options

You might have noticed a variety of other message options on the Ribbon or in the Properties dialog box. See Table 2-2: Message Options for a complete list of message options and their descriptions.

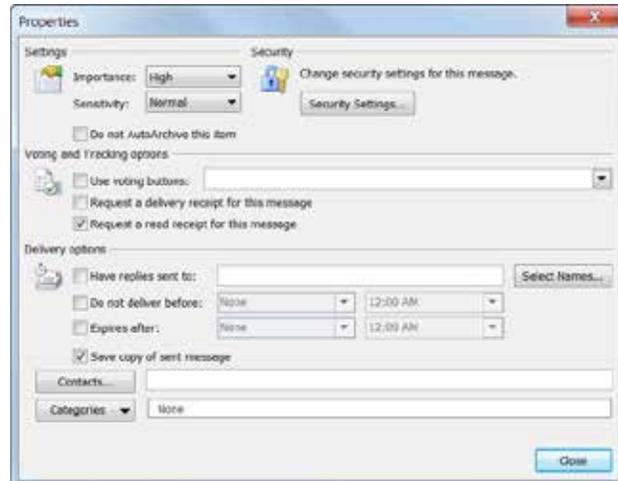


Figure 2-6: The Properties dialog box.

Table 2-2: Message Options

Importance	Specifies whether the message is of high, normal, or low importance.
Sensitivity	Displays a tag indicating how the recipient should treat the message.
Security Settings	Encodes the message so it is not readable by anyone except the intended recipient(s).
Use voting buttons	Allows the recipient to quickly answer a sender's question by use of voting buttons. Outlook can then tabulate the results of the vote for the sender.
Request a delivery receipt for this message	Returns a message to you verifying the date and time the message arrived at the Inbox of the recipient.
Request a read receipt for this message	Returns a message to you verifying the date and time the message was opened by the recipient.
Have replies sent to	Sends all replies to the message to someone else, such as an assistant.
Do not deliver before	Waits to send the message until the date and time you specify.
Expires after	Makes the message unavailable after a specified date and time.
Save sent message to	Saves a copy of the sent message in the specified folder.

Formatting Text

In this lesson you will learn how to change the font type, size, style and color of the text in your e-mail messages.

! Trap: You cannot format message text if your message format is set to Plain Text. To see which message format you are using, click the **Format Options** tab on the Ribbon.

Change font type

One way to emphasize text in a message is by changing its font type.

1. Select the text you wish to format.
2. Click the **Message** tab on the Ribbon and click the **Font** list arrow in the Basic Text group.

A list of available fonts appears.

3. Select a font type from the list.

Other Ways to Change Font Type:

Click the **Format Text** tab on the Ribbon and click the **Font** list arrow in the Font group. Or, use the commands found on the Mini Toolbar.

Change font size

Making text **larger** is another way to emphasize text.

1. Select the text you wish to format.
2. Click the **Message** tab on the Ribbon and click the **Font Size** list arrow in the Basic Text group.

A list of font sizes appears.

3. Select a font size from the list.

Other Ways to Change Font Size:

Click the **Format Text** tab on the Ribbon and click the **Font** list arrow in the Font group. Or, use the commands found on the Mini Toolbar.

Change font color

Changing font **color** is another way to emphasize text in an e-mail message.

1. Select the text you wish to format.
2. Click the **Message** tab on the Ribbon and click the **Font Color** list arrow in the Basic Text group.

A list of font colors appears.

& Exercise

- **Exercise File:** A new e-mail message with the text “Today I learned how to compose and send an e-mail message” in the message body area.
- **Exercise:** Change the font type to Arial Black in the message body area. Change the font color of the words “compose” and “send” to red.

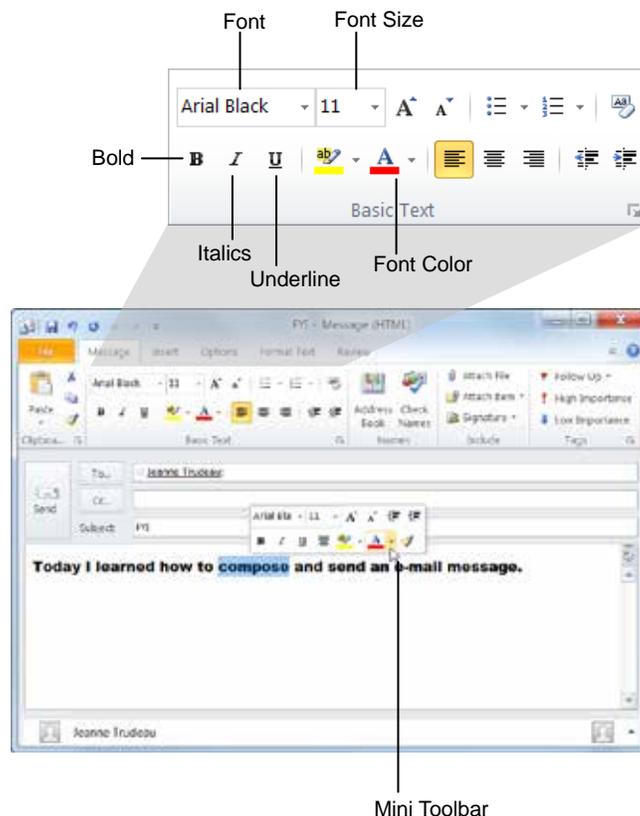


Figure 2-7: You can format text using the Mini Toolbar or the Basic Text group on the Message tab.

3. Select the color you want to use.

 **Other Ways to Change Font Color:**

Click the **Format Text** tab on the Ribbon and click the **Font Color** list arrow in the Font group. Or, use the commands found on the Mini Toolbar.

Change font style

In addition to changing font type, size, and color, you can also emphasize the text in an e-mail message by changing its font style. The most common font styles are **bold**, *italic* and underline.

1. Select the text you wish to format.
2. Click the **Message** tab on the Ribbon and click the appropriate button in the Basic Text group.

The formatting is applied to the selected text.

 **Other Ways to Change Font Style:**

Click the **Format Text** tab on the Ribbon and click the appropriate button in the Font group. Or, use the commands found on the Mini Toolbar. Or, use the keystroke shortcuts shown in Table 2-3: Font Style Keystroke Shortcuts.

Table 2-3: Font Style Keystroke Shortcuts

Bold	<Ctrl> +
Italic	<Ctrl> + <I>
Underline	<Ctrl> + <U>

Checking your Spelling

It's a good idea to spell-check your messages before you send them. Not only do spelling errors make you look unprofessional, they also reflect poorly on your product or organization.

By default, Outlook checks for spelling errors as you type, underlining misspelled words in red. This makes it easy to correct spelling errors individually.

1. In the message window, right-click the misspelled word.

A contextual menu appears, offering suggestions for the correct spelling of the word.

2. Select the correct spelling of the word from the contextual menu.

Outlook corrects the spelling of the word and the red underline disappears.

 **Other Ways to Check Spelling:**

In the Message window, click the **Review** tab on the Ribbon and click the **Spelling & Grammar** button in the Proofing group. Or, press <F7>.

 **Tips**

- ü If a word is underlined in red but you know it is correctly spelled, see Table 2-4: Spelling Options.
- ü New in Outlook 2010, Spell Check now checks the subject line of messages, tasks, and meeting requests.

& Exercise

- **Exercise File:** A new e-mail message with the text “Today I learned how to check my spelalling” in the message body area.
- **Exercise:** Right-click the misspelled word and select “spelling” from the contextual menu.

Table 2-4: Spelling Options

Ignore Once	Accepts the spelling as is and moves on to the next spelling error.
Ignore All	Accepts the spelling as is and ignores all future occurrences of the word in the message.
Add to Dictionary	If a word cannot be found in the Microsoft Office Dictionary, it is marked as misspelled. This option adds the word to the dictionary so that it is recognized during future spell checks.

spelalling

Outlook checks for spelling errors as you type, underlining questionable words in red.

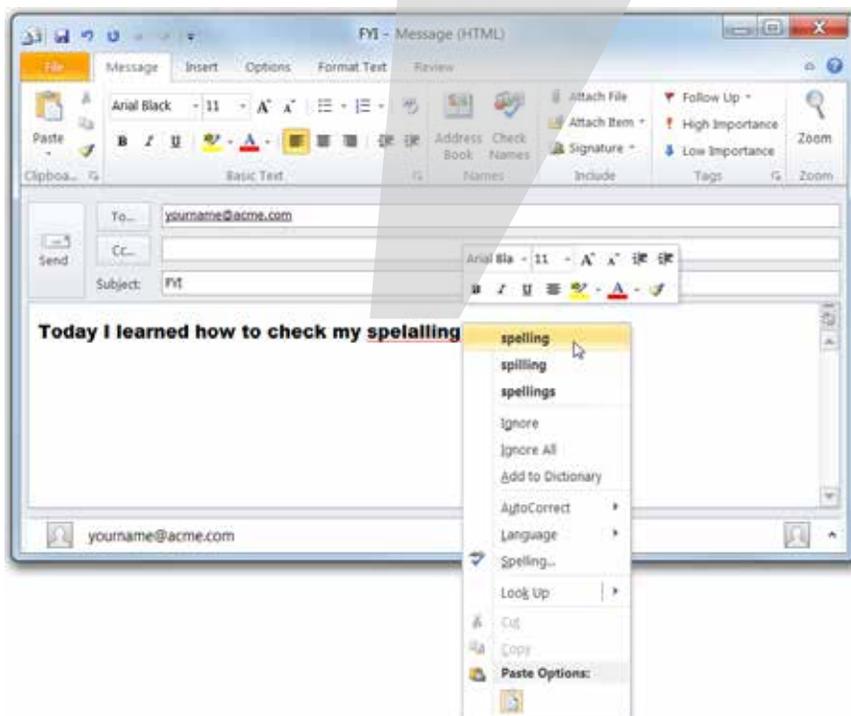


Figure 2-8: To correct a spelling error, right-click it and select a correction from the contextual menu.

Working with Hyperlinks

A hyperlink is a dynamic word or icon that, when clicked, opens a specific file or location. You can create a hyperlink to a Web page, picture, document, and more.

Insert a hyperlink

Inserting a hyperlink is extremely easy—all you have to do is type!

1. In the body area of the message, position the insertion point where you want to insert the hyperlink.
2. Type the Web address of the page you want to link to; for example, www.customguide.com; and press **<Enter>**.

Outlook formats the Web address as a hyperlink.

Other Ways to Insert a Hyperlink:

Copy the Web address and paste it into the message body. Or, Click the **Insert** tab on the Ribbon and click the **Hyperlink** button in the Links group. Enter the hyperlink address and text to display and click **OK**.

Change the text of a hyperlink

If the Web address you want to link to is rather lengthy, you probably don't want the entire address to appear in the message window. When this happens, change the hyperlink's text.

1. In the Message window, click the **Insert** tab on the Ribbon.
2. Click the **Hyperlink** button in the Links group.
The Insert Hyperlink dialog box appears.

3. Type the hyperlink text in the **Text to display** text box.

The hyperlink text is the text in the message that will be clicked.

4. Type the address that you want to link to in the **Address** field and click **OK**.

The hyperlink text is inserted into the message.

Other Ways to Change Hyperlink Text:

Right-click the hyperlink, select **Edit Hyperlink** from the contextual menu, and follow the steps described above.

& Exercise

- **Exercise File:** A new e-mail message with the text “Today I learned how to insert a hyperlink.” in the message body area.
- **Exercise:** Insert a hyperlink to “www.customguide.com” using the word “hyperlink” in the message. If you are connected to the Internet, click the hyperlink to open it.

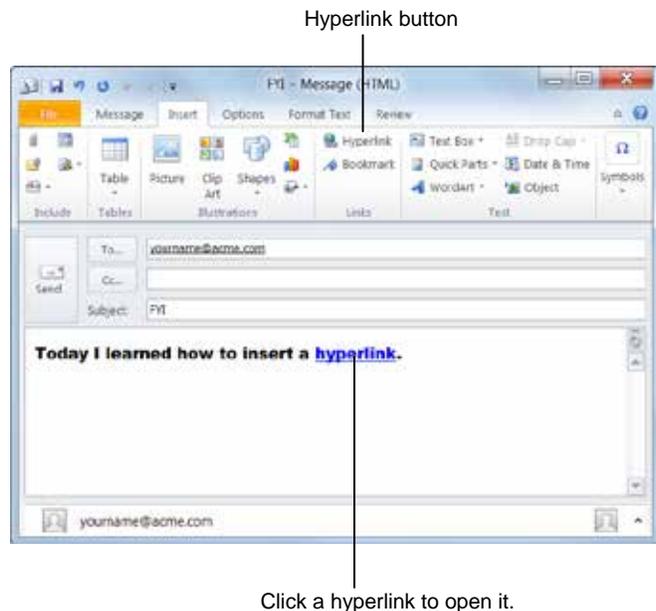


Figure 2-9: In order to distinguish hyperlinks from normal text, Outlook underlines them and displays them in a different color.

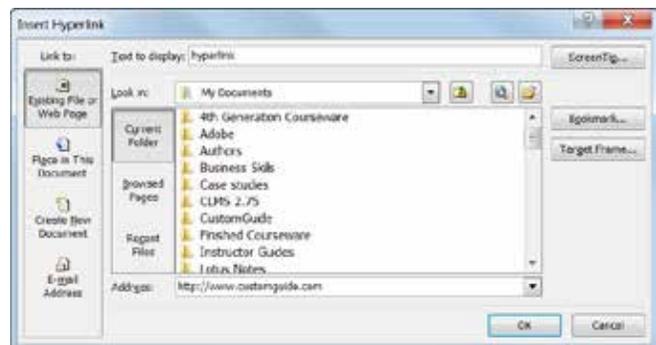


Figure 2-10: The Insert Hyperlink dialog box.

Open a hyperlink

Opening a hyperlink is extremely easy...

- Click the hyperlink.

The hyperlink opens in a Web browser window.

 **Other Ways to Open a Hyperlink:**
Right-click the hyperlink and select **Open Hyperlink** from the contextual menu.

 **Tip:** To open a hyperlink in a message that you have not yet sent, press and hold the **<Ctrl>** key and click the hyperlink.

Tips

- ü If the address you want to link to contains spaces or characters, you must enclose the entire address in chevrons. For example, `<file:///C:\My Documents\Sales Results.doc>`.
- ü If the URL begins with www, you do not need to type http://. Outlook will automatically format the URL as a link to the Web.

Attaching a File to a Message

One of the most useful features of e-mail is the ability to attach one or more files to a message. You can attach pictures, documents, PDFs and more in Outlook.

1. In the Message window, click the **Message** tab on the Ribbon and click the **Attach File** button in the Include group.

The Insert File dialog box appears.

2. Navigate to and select the file you want to insert and click **Insert**.

The selected file is attached to the message.

Other Ways to Attach a File:

In the Message window, click the **Insert** tab on the Ribbon and click the **Attach File** button in the Include group.

Attach other items

You can also attach other items to a new mail message, such as another e-mail, an appointment, or a contact's Business Card.

1. In the Message window, click the **Message** tab on the Ribbon and click the **Attach Item** button in the Include group.

A list of items appears, including:

- **Business Card:** Select this option to include a Business Card from your Contact list.
- **Calendar:** Select this option to include your free/busy information.
- **Outlook Item:** Select this option to include an Outlook item, such as an e-mail, appointment, or task.

2. Select the type of item you want to attach and follow the prompts if necessary.

& Exercise

- **Exercise File:** Certificate.docx and a new e-mail message.
- **Exercise:** Attach the Certificate.docx file to the message.

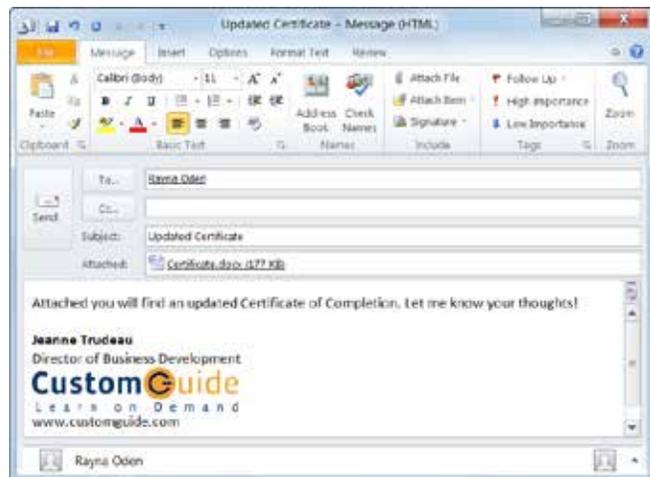


Figure 2-11: When a message contains an attachment, the name of the attached file appears in the Attached field.

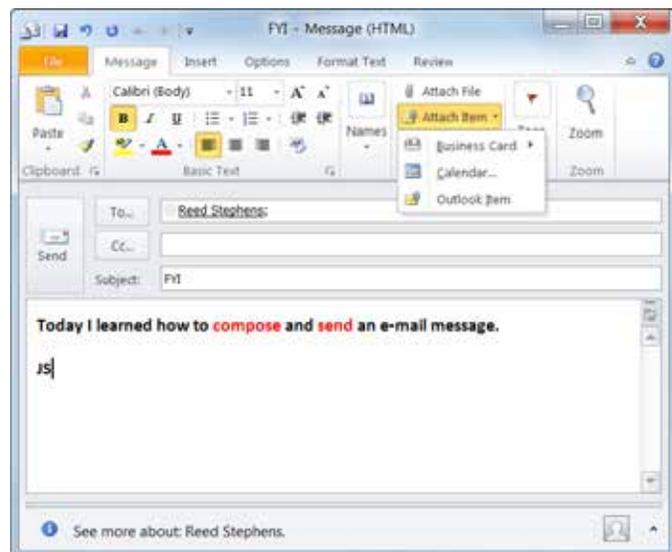


Figure 2-12: Click the Attach Item button to attach a business card, calendar, or other Outlook item.

Composing and Sending E-mail Review

Quiz Questions

15. When you want to send a blind carbon copy of an e-mail to someone, which field must you use?
 - A. Address
 - B. To
 - C. Bcc
 - D. Cc

16. You want to send a carbon copy of an e-mail to your boss. Where should you enter your boss's e-mail address?
 - A. In the To: field
 - B. In the Bcc: field
 - C. In the Address: field
 - D. In the Cc: field

17. Read receipts are supported by all e-mail programs. (True or False?)

18. Which of the following is NOT a way to format text in an e-mail message?
 - A. Use the commands on the Mini Toolbar.
 - B. Use the commands found on the Standard toolbar.
 - C. Use a keyboard shortcut, such as <Ctrl> + .
 - D. Use the commands located on the Format Text tab on the Ribbon.

19. What should you do if a word is marked as misspelled, but is actually correct?
 - A. Click Change.
 - B. Click Add to Dictionary.
 - C. Click Correct.
 - D. Click Correct All.

20. To insert a hyperlink to a Web site, all you have to do is type the Web address in the body area of the message. (True or False?)

21. Which of the following items can you attach to an e-mail message?
 - A. Pictures
 - B. PDFs
 - C. Word documents
 - D. All of the above

Quiz Answers

15. D. When you want to send a blind carbon copy of an e-mail to someone, use the Cc field.
16. D. Entering an e-mail address in the Cc: field sends that person a carbon copy of the message.
17. False. Read receipts are only supported by select e-mail programs.
18. B. The Standard toolbar is not available in the Outlook 2010 message window.
19. B. Click Add to Dictionary to add the word to the dictionary. Click Ignore Once or Ignore All to simply ignore the word and move on to the next.
20. True. You can insert a hyperlink into a message simply by entering its Web address.
21. D. You can attach pictures, PDFs, documents and more to a message in Outlook.

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Now that you know how to compose and send e-mail messages, you need to know how to receive and sort them.

In this chapter, we'll show you how to receive messages from your e-mail server and what to do with those messages once they appear in your Inbox. For example, you can reply to a message, forward a message on to someone else, flag a message for later follow-up, and more.

Using Exercise Files

This chapter suggests exercises to practice the topic of each lesson. There are two ways you may follow along with the exercise files:

- Open the exercise file for a lesson, perform the lesson exercise, and close the exercise file.
- Open the exercise file for a lesson, perform the lesson exercise, and keep the file open to perform the remaining lesson exercises for the chapter.

The exercises are written so that you may “build upon them”, meaning the exercises in a chapter can be performed in succession from the first lesson to the last.

Receiving and Reading E-mail

Outlook automatically checks for new messages and displays them in your Inbox every 30 minutes. But you can manually check for messages anytime.

Retrieve e-mail manually

If you don't want to wait for Outlook to retrieve your messages, you can check for messages manually.

1. Click the **Mail** button in the Navigation Pane.
The Inbox appears.
2. Click the **Send/Receive** tab on the Ribbon and click the **Send/Receive All Folders** button in the Send & Receive group.

Outlook checks all accounts for messages. Any new, unread messages appear in **bold** and have a closed envelope icon (✉) next to them.

Tip: If you have Outlook configured to check multiple e-mail accounts, you can manually check a specific account. Click the **Send/Receive** tab on the Ribbon and click the **Send/Receive Groups** button in the Send & Receive group. Point to the account you wish to check and select **Inbox** from the list.

Reading E-mail

When messages arrive in your Inbox, you can read them.

- Click or double-click the message that you want to read.
A selected message appears in the Reading Pane. A double-clicked message appears in its own window. Once a message has been read, its envelope icon changes to open.

& Exercise

- **Exercise File:** Create and send a new message to yourself.
- **Exercise:** Click the Send/Receive All Folders button on the Ribbon and open the message you just sent yourself in its own window.

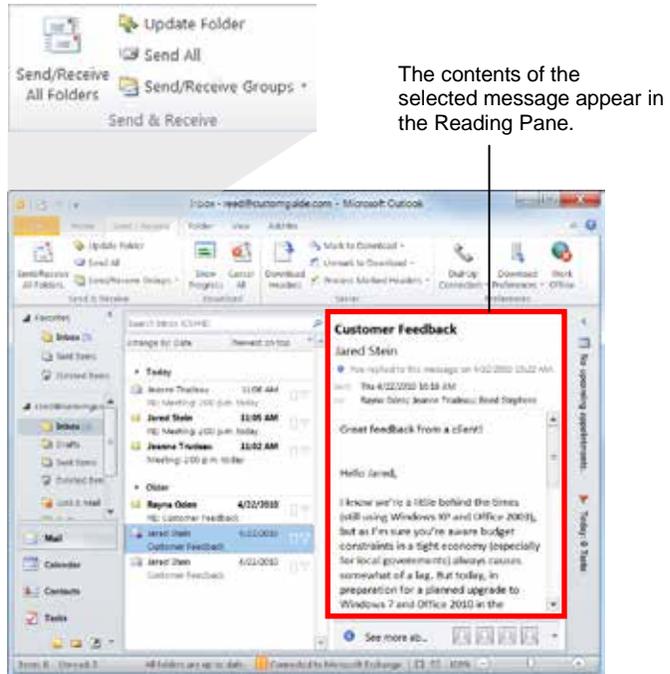


Figure 3-1: The main Outlook window.

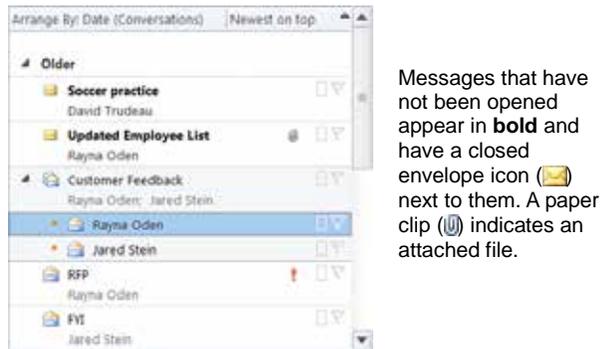


Figure 3-2: A close-up of the Inbox.

Table 3-1: Message Icons

	Unopened Message	This message has not yet been read or opened.		Attachment	This message has one or more files attached to it.
	Opened Message	This message has been read (or at least opened).		Urgent	This message is marked as urgent—better look at it fast!
	Reply	You have replied to this e-mail message.		Flagged	This message has been flagged to remind you about something.
	Forward	You have forwarded this e-mail message			

Change automatic retrieval settings

Outlook checks your mail server for new messages every 30 minutes by default, but you can change the length of this interval.

1. Click the **File** tab on the Ribbon and click the **Options** button.

The Outlook Options dialog box appears.

2. Click the **Advanced** tab.

Advanced options for working with Outlook appear.

3. Click the **Send/Receive** button under the Send and receive heading.

The Send/Receive Groups dialog box appears.

4. Under “Setting for group ‘All Accounts’”, make sure the **Schedule an automatic send/receive every** check box is selected.

Now specify how much time you want to elapse between new message downloads.

5. Enter the number of minutes you want to elapse between downloads.

6. Click **Close**, and then click **OK**.

Outlook will check for mail with the new interval.

✓ Tips

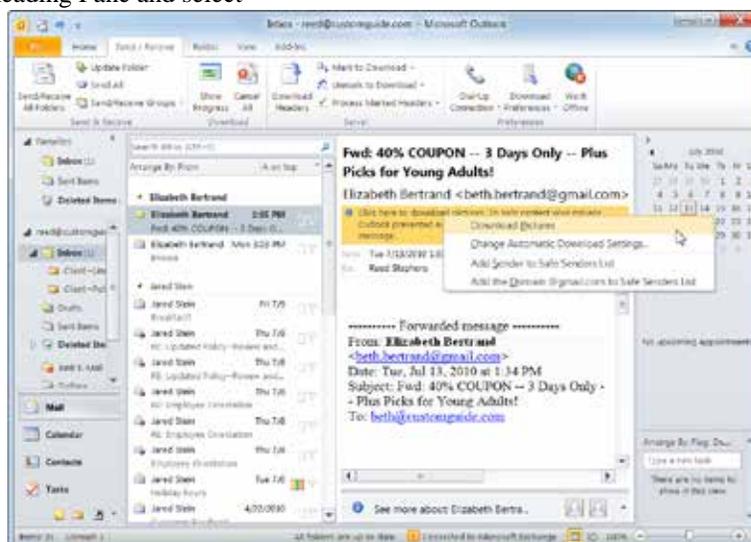
- ü You can view messages safely in the Reading Pane; potentially malicious scripts or attachments are not activated or opened automatically.
- ü By default, Outlook is configured to block external content, such as links to pictures or sounds, in HTML messages that you receive. To unblock content, click the notification area in the Reading Pane and select **Download Pictures**.



Change how often Outlook checks for new messages.

Figure 3-3: The Send/Receive Groups dialog box.

Figure 3-4: By default, Outlook blocks external content in HTML messages that you receive, such as images. To unblock content, click the notification area and select Download Pictures.



Replying to and Forwarding a Message

Reply to a message

Replying to an e-mail is like answering a letter; it acknowledges that you received the message and allows you to respond.

1. Click the **Mail** button in the Navigation Pane
The Inbox appears.
2. Double-click the message to which you want to reply.
The message opens in its own window.
3. Click the **Message** tab on the Ribbon and click the **Reply** or **Reply All** button in the Respond group.
 - **Reply:** Sends your reply to the author of the message only.
 - **Reply All:** Sends your reply to the author of the message and everyone else who received the message.
4. Type your reply and click the **Send** button.
 - **Other Ways to Reply to a Message:**
In the Inbox, click the message you to which you want to reply. Click the **Home** tab and click the **Reply** or **Reply All** button in the Respond group. Or, right-click the message and select **Reply** or **Reply All** from the contextual menu.

Forward a message

Forwarding a message sends the message on to someone else instead of back to the original sender.

1. Click the **Mail** button in the Navigation Pane.
The Inbox appears.
2. Double-click the message that you want to forward.
The message opens in its own window.
3. Click the **Message** tab on the Ribbon and click the **Forward** button in the Respond group.
4. In the **To** field, enter the e-mail address(es) of the person(s) to whom you want to forward the message.
5. Type any comments you wish to add to the message and click the **Send** button.

& Exercise

- **Exercise File:** If necessary, create and send a new message to yourself and then open it in its own window.
- **Exercise:** Reply to a message and type “Replying to an e-mail acknowledges your receipt of the e-mail.” in the message body area. Send the message.

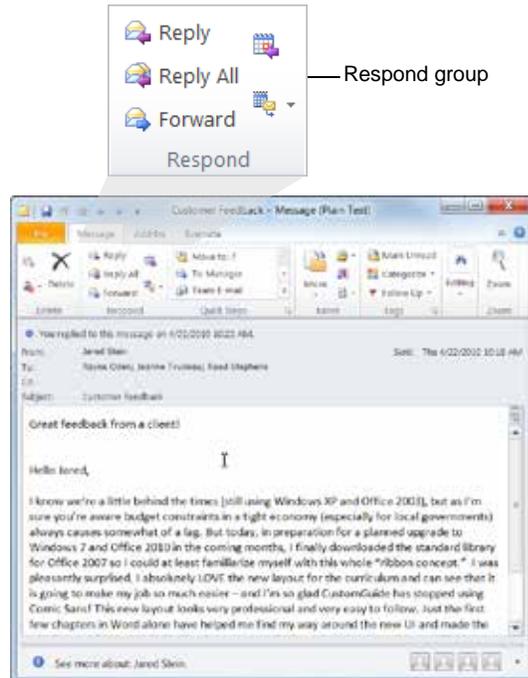
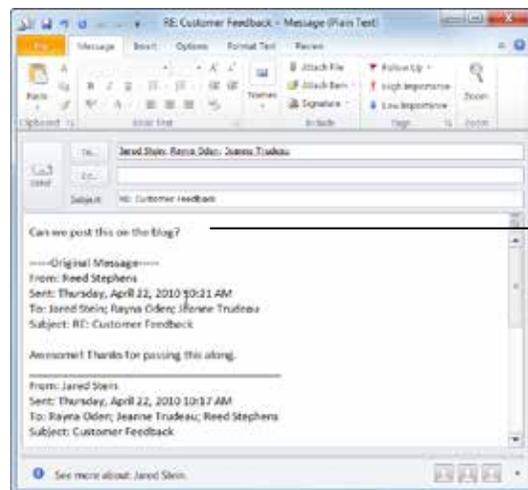


Figure 3-5: Use the buttons in the Respond group on the Ribbon to reply to or forward a message.



Type your reply here

Figure 3-6: When you reply to a message, the Name and Subject fields are filled in for you automatically. All you have to do is type your reply and click Send.

 **Other Ways to Forward a Message:**

In the Inbox, click the message that you want to forward. Click the **Home** tab on the Ribbon and click the **Forward** button in the Respond group. Or, right-click the message and select **Forward** from the contextual menu.

 **Trap:** All attachments and message options, such as “High Importance” tags, are included when you forward a message.

Opening an Attachment

Whenever you see a paper clip icon (📎) next to a message, the message contains an attachment. This lesson will show you how to preview, open, and save an attachment.

✔ Tips

- ⊘ Never open an unfamiliar or suspicious attachment. Install a good anti-virus program on your computer and save files to your computer before opening them.

Preview an attachment

Attachment Preview lets you preview an attachment before you open it.

1. Click the **Mail** button in the Navigation Pane and click the message containing the attachment.

The message is shown in the Reading pane.

2. In the Reading Pane, click the attachment that you want to preview.

The Attachments contextual tab appears on the Ribbon.

A warning message may appear, reminding you that you should only preview files from a trustworthy source. If you trust the sender of the attachment, continue to the next step.

3. Click the **Preview file** button in the Reading Pane.

The attachment appears in the Previewer.

✔ **Tip:** Scripts, macros, ActiveX controls, and other active content embedded in the attachment are disabled in the Previewer.

4. Click the **Message** button in the Reading Pane to exit the Previewer.

🔗 Other Ways to Preview an Attachment:

In the Inbox, double-click the message containing the attachment that you want to preview. Then, click the attachment in the message window and click **Preview file**.

Open an attachment

To open an attachment, double-click it.

1. Click the **Mail** button in the Navigation Pane and select the message containing the attachment.

The message is shown in the Reading Pane.

& Exercise

- **Exercise File:** Create a new e-mail with your e-mail address in the To field and “Congratulations” in the Subject field. Attach the Certificate.docx file to the message and send it.
- **Exercise:** When a message with an attachment appears in your Inbox, preview and open the attachment.



Figure 3-7: Messages that contain an attachment have a tiny paper clip icon next to them.

When you're finished previewing the attachment, click the Message button to return to the message.

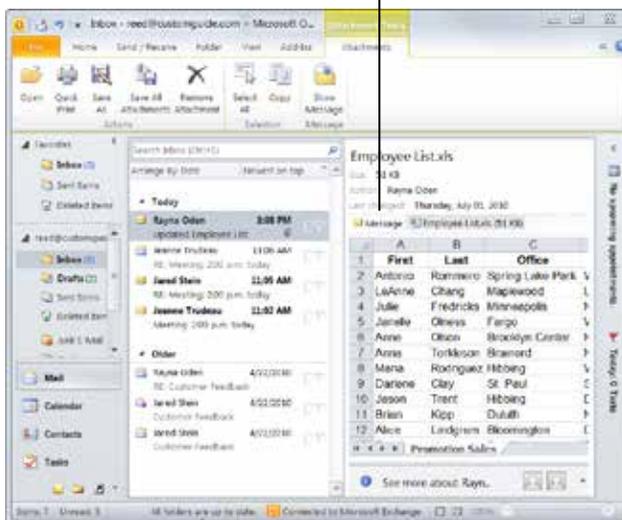


Figure 3-8: Previewing an attachment in the Reading pane.

Receiving E-mail

2. Double-click the attachment that you want to open.

The attachment opens.

✔ **Tip:** The Opening Mail Attachment dialog box may appear to remind you that you should only open files from a trustworthy source. If you trust the sender of the attachment, click the **Open** button in the dialog box.

- 🔗 **Other Ways to Open an Attachment:**
In the Inbox, double-click the message containing the attachment that you want to open. Then, double-click the attachment in the message window. Or, click the attachment in the message window and click the **Open** button in the Actions group of the Attachments tab on the Ribbon.

Save an attachment

If you're going to be making changes to an attachment, you'll need to save it to your computer first.

1. Click the **Mail** button in the Navigation Pane and select the message containing the attachment.

The message appears in the Reading Pane.

2. Click the attachment that you want to save.
The Attachments contextual tab appears on the Ribbon.

3. Click the **Attachments** tab on the Ribbon and click the **Save As** button in the Actions group.

If a message contains multiple attachments, you can click the **Save All Attachments** button to save all the attachments to the same location at the same time.

4. Enter a new name for the file, if necessary, and specify where you want to save the file.

5. Click **Save**.

- 🔗 **Other Ways to Save an Attachment:**
In the Inbox, select the message containing the attachment that you want to save. Right-click the attachment in the Reading pane and select **Save As** or **Save All Attachments** from the contextual menu.

✔ Tips

- ü Outlook may block certain attachments because they are potentially unsafe file types. These include .bat, .exe, .vbs, and .js files.

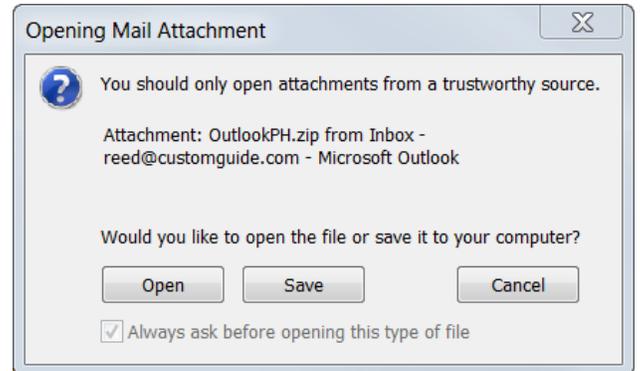


Figure 3-9: The Opening Mail Attachment dialog box.

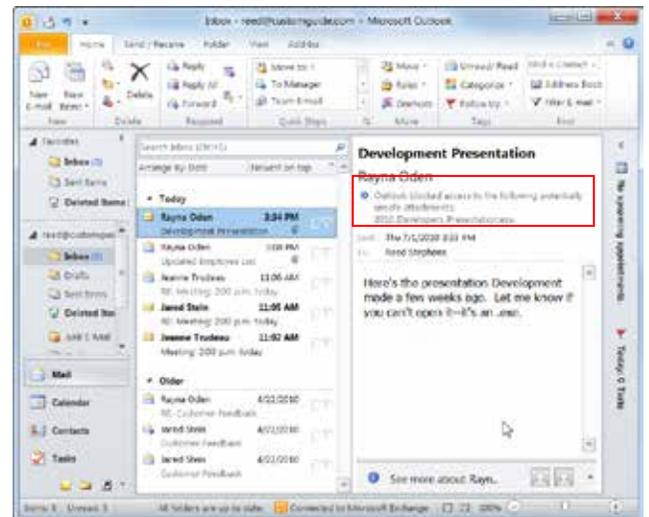


Figure 3-10: Blocked attachment files are listed in the InfoBar at the top of a message.

Deleting a Message

When you're finished with a message, it's a good idea to delete it. Deleting messages as soon as you're done with them keeps your Inbox organized and free from clutter.

Delete a message

1. Click the **Mail** button in the Navigation Pane and select the message you want to delete.
2. Press the **<Delete>** key.

The message is removed from your Inbox and placed in the Deleted Items folder.

Other Ways to Delete a Message:

Click the **Home** tab on the Ribbon and click the **Delete** button in the Delete group. Or, right-click the message and select **Delete** from the contextual menu.

Retrieve a message

Just like the Windows Recycle Bin, you can retrieve an item if you accidentally delete it.

1. Click the **Deleted Items** folder in the Navigation Pane and select the message you want to retrieve.
2. Click the **Home** tab on the Ribbon and click the **Move** button in the Move group.

A list of folders appears.

3. Select the folder to which you want to restore the message.

The message is moved to the specified folder.

Tips

- ü Many organizations limit how much space Outlook can acquire on the server—translation: how many messages you can have in your Mailbox. Deleting a message as soon as you're finished with it helps keep your Inbox within that limit.
- ü To permanently delete a single message, select the message and press **<Shift> + <Delete>**. To permanently delete all of the messages in your Deleted Items folder, right-click the Deleted Items folder in the Navigation Pane and select **Empty Folder** from the contextual menu.
- ü Only permanently delete a message if you are absolutely sure you won't need the message again. Messages that have been permanently deleted cannot be retrieved.

& Exercise

- **Exercise File:** Any e-mail message.
- **Exercise:** Delete a message from your Inbox.

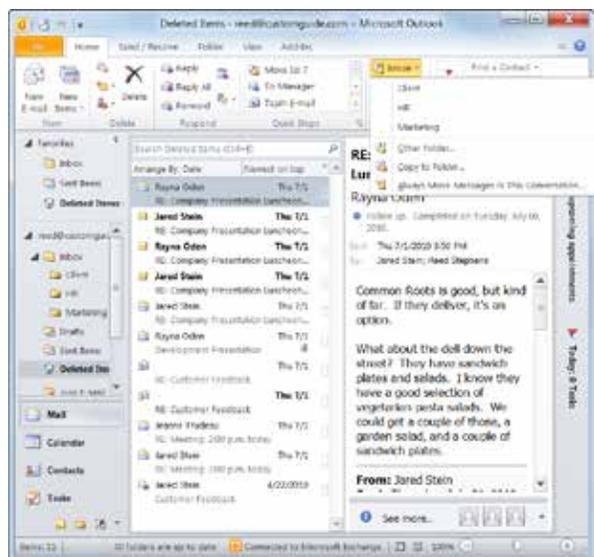


Figure 3-11: You can select the folder to which you want to restore the message when you are retrieving a deleted message.

Flagging a Message for Follow-up

Flagging a message is an easy way to remind yourself to follow up on an important e-mail or task. When you flag an item, a small  icon appears next to the message, and a copy of the message is added to your To-Do List.

Flag a message

Flagging a message is extremely easy.

1. Click the **Mail** button in the Navigation Pane.

The Inbox appears.

2. Click the **Flag** area of the message you want to flag.

The default flag—the Today flag—is applied to the message, and a copy of the message is added to your To-Do List.

Other Ways to Flag a Message:

Click the message you want to flag, click the **Home** tab on the Ribbon, click the **Follow Up** button in the Tags group, and select a flag from the list. Or, right-click the message, select **Follow Up** from the contextual menu, and select a flag from the submenu.

Change flags

The default flag is the Today flag, but there are several others flags from which to choose.

1. Click the message containing the flag you wish to change.
2. Click the **Home** tab on the Ribbon and click the **Follow Up** button in the Tags group on the Home tab of the Ribbon.

A list of flags appears.

3. Select a flag from the list.

The selected flag is applied to the message.

Other Ways to Change Flags:

Right-click the flag you wish to change and select a new flag from the contextual menu.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Flag a message in the Inbox. Change this flag to the Next Week flag. Remove the flag altogether.

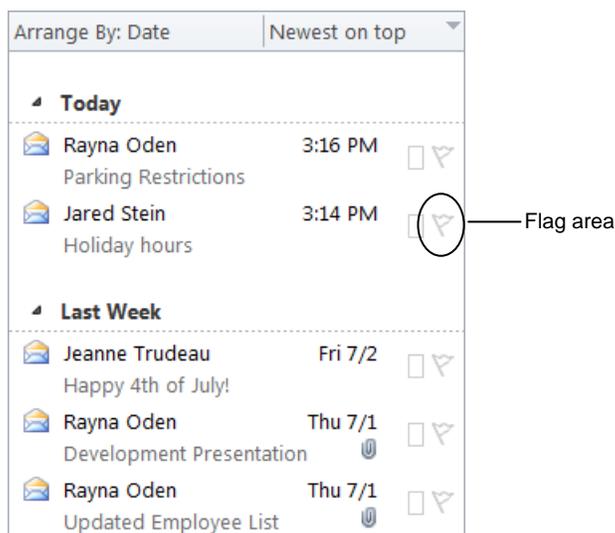


Figure 3-12: Click the Flag area of a message to flag it.

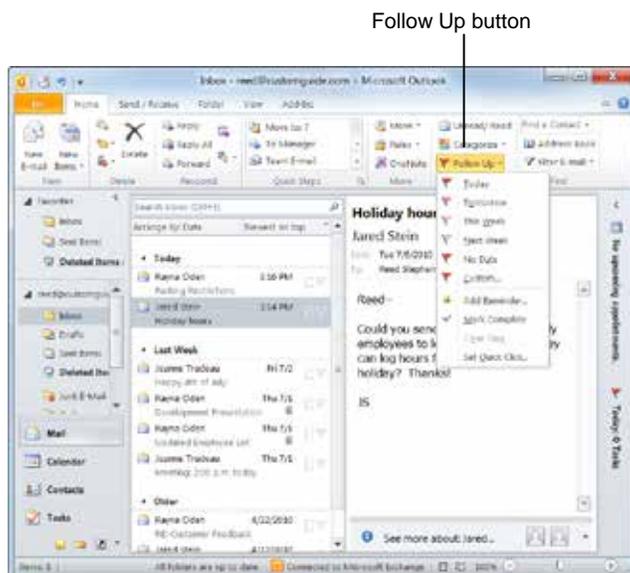


Figure 3-13: To change flags, click the Follow Up button in the Tags group on the Home tab on the Ribbon.

Set a reminder date

You can add a reminder date to a flagged message so that Outlook reminds you to follow-up on the message when the specified date arrives.

1. Right-click the flag to which you want to add a reminder date and select **Add Reminder** from the contextual menu.

The Custom dialog box appears. Here you can set a reminder date, change the purpose of the flag, or set a start and end date for the flag.

Other Ways to Set a Reminder Date:

Click the message you to which you want to add a reminder date, click the **Home** tab on the Ribbon, click the **Follow Up** button in the Tags group, and select **Add Reminder** from the list.

2. Click the **Reminder** list arrow and select a date from the Calendar.
3. Click **OK**.

Outlook will send you a reminder to follow-up on the message when the specified date arrives.

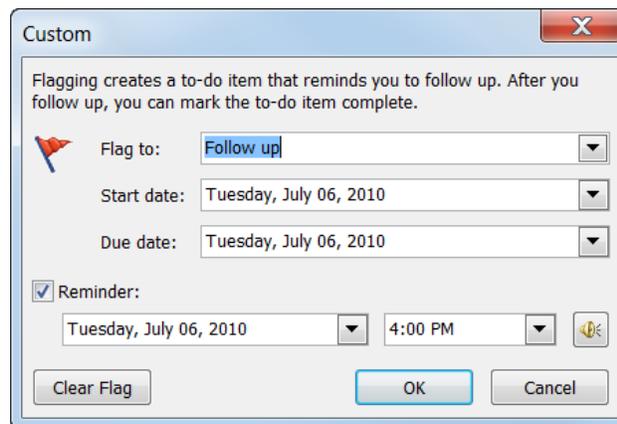


Figure 3-14: Set a reminder date in the Custom dialog box.

Remove a flag

Once you've followed-up on a flagged message, you can remove the flag or mark it as "Complete".

1. Right-click the flag you want to remove.
2. Select **Mark Complete** or **Clear Flag** from the contextual menu.

Depending on the option you selected, the flag is either replaced by a checkmark (✓) or removed altogether.

Other Ways to Mark a Flag "Complete":

Click the flag.

Tips

- ü You can also control message flags from inside the message window. To do so, click the **Follow Up** button in the Tags group on the Message tab of the Ribbon and select an option from the list.
- ü You can also flag contacts and tasks.

Table 3-2: Description of Flags

Flag	Start Date	Due Date
Today	Current date	Current date
Tomorrow	Current date plus one day	Current date plus one day
This week	Current date plus two days, but no later than the last work day of this week	Last work day of this week
Next week	First work day of next week	Last work day of next week
No date	No date	No date
Custom	Current date is displayed; choose a custom date if desired	Current date is displayed; choose a custom date if desired

Using Color Categories

Color categories let you organize your Outlook items into specific groups, making the information they contain easier to distinguish. You can choose from a set of default categories, or you can create your own.

Assign a color category

1. Click the **Mail** button in the Navigation Pane.
The Inbox appears.
 2. Select the message you wish to categorize
 3. Click the **Home** tab on the Ribbon and click the **Categorize** button in the Tags group.
A list of categories appears.
 4. Select a category from the list.
The selected category is applied to the message.
- ✔ **Tip:** You can assign multiple categories to a message.
- 🔴 **Other Ways to Categorize a Message:**
Right-click the message you want to categorize, select **Categorize** from the contextual menu, and select a category from the list.

Rename a category

Outlook includes several color categories such as the “Red Category” or “Blue Category.” You can rename these categories to meet your needs.

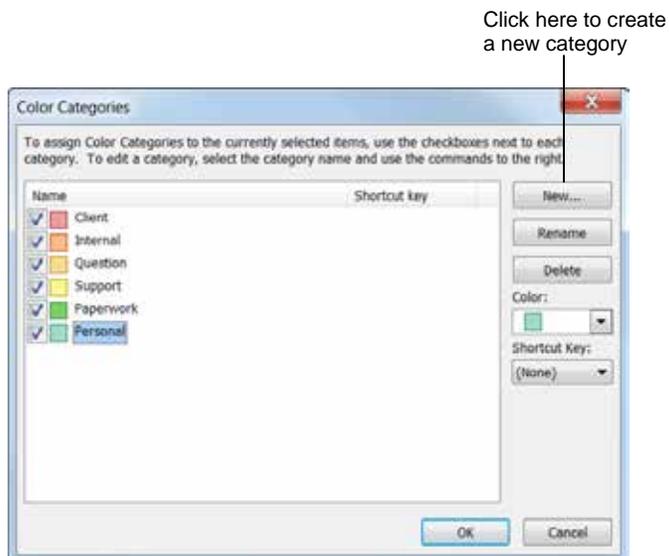
1. Click the **Mail** button in the Navigation Pane.
The Inbox appears.
2. Click the **Home** tab on the Ribbon and click the **Categorize** button in the Tags group.
A list of options appears.
3. Select **All Categories** from the list.
The Color Categories dialog box appears.
4. Click the color category you wish to rename and click **Rename**.
The color category name becomes editable.
5. Type a new name for the category and click **OK** when you’re finished.
The category is renamed.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Create a new category named “Practice” using any color you wish. Apply this category a message.
Clear the “Practice” category from the message.



Figure 3-15: To assign a color category to a message, click the Categorize button in the Tags group on the Home tab of the Ribbon and select a category from the list.



Create a new category

Outlook may contain default categories, but you can create your own to better meet your needs.

1. Click the **Mail** button in the Navigation Pane.
The Inbox appears.
2. Click the **Home** tab on the Ribbon and click the **Categorize** button in the Tags group.
A list of options appears.
3. Select **All Categories** from the list.
The Color Categories dialog box appears.
4. Click **New**.
The Add New Category dialog box appears. Here you can name the category, assign a new color, or create a keystroke shortcut.
5. Set the properties of the new category and click **OK**.
The new category is added to the list of categories.

Change the Quick Click category

You can also change the Quick Click category, or the category that appears by default when you click the Category area of the message.

1. Click the **Mail** button in the Navigation Pane.
The Inbox appears.
2. Click the **Home** tab on the Ribbon and click the **Categorize** button in the Tags group.
A list of options appears.
3. Select **Set Quick Click**.
The Set Quick Click dialog box appears.
4. Click the list arrow, select the category you want to appear by default, and click **OK**.
Now every time you click the Category area of a message, the selected category will be assigned to the message.

Clear a category

If you decide you don't want to categorize a message after all, you can clear the category.

- Right-click the message from which you wish to clear categories and select **Clear All Categories**.

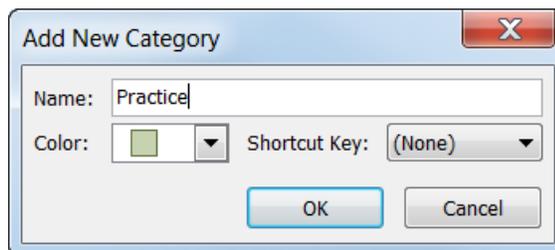


Figure 3-17: The Add New Category dialog box.

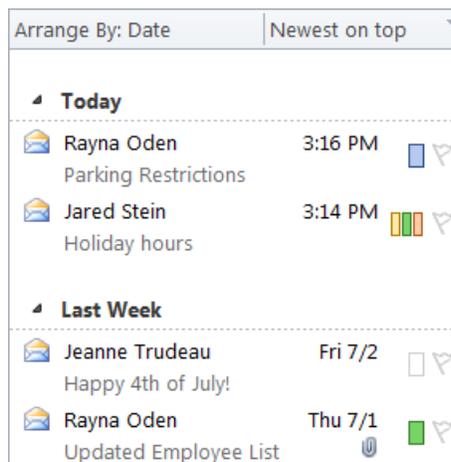


Figure 3-18: View the categories assigned to a message in the Category area.

Viewing Conversations

Keeping track of your messages can be challenging, especially when multiple people respond to the same message. In Outlook 2010, you can use Conversation View to group related e-mails into conversations.

Turn on Conversation View

When Conversation View is enabled, Outlook groups messages with the same subject into conversations.

1. Click the **Mail** button in the Navigation Pane.
The Inbox appears.
2. Click the **View** tab on the Ribbon and click the **Show as Conversations** check box in the Conversations group.
The Microsoft Outlook dialog box appears. You can apply Conversation View to the currently selected folder or to all folders.

3. Select the folder where you want to apply Conversation View.
Conversation View is applied.

✓ Tips

- ü Conversations are grouped by subject. If any message recipient changes the subject of a message, then that message becomes a new conversation.
- ü If the Show Conversations check box is inactive, make sure that you have sorted your messages by Date (Conversation).

View a Conversation

Expanding a Conversation not only lets you view all of the messages in a Conversation, but it also lets you view the relationship between messages.

1. Click the **Mail** button in the Navigation Pane.
The Inbox appears.
2. Click the conversation you wish to view.
The most recent message in the Conversation displays in the Reading Pane.

Conversations often branch out in multiple directions. A large orange dot (●) indicates separate branches of a conversation.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Turn on Conversation View.
Expand a Conversation.
Turn off Conversation View.

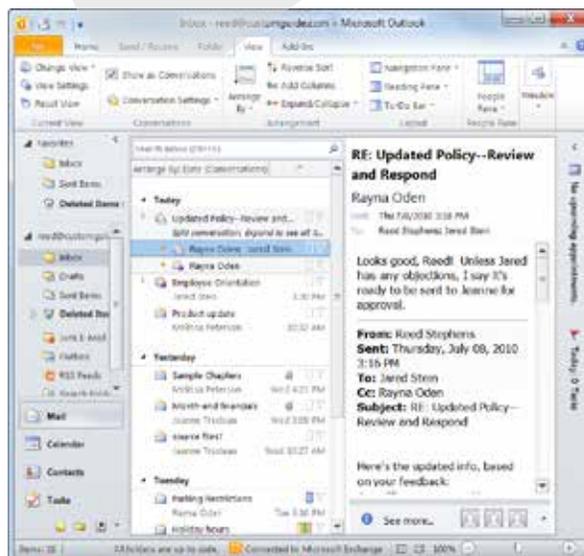
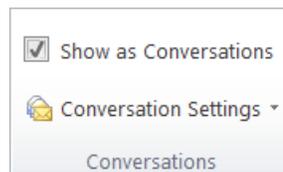


Figure 3-19: Turn on Conversations on the View tab of the Ribbon.



Figure 3-20: A Conversation with multiple branches.

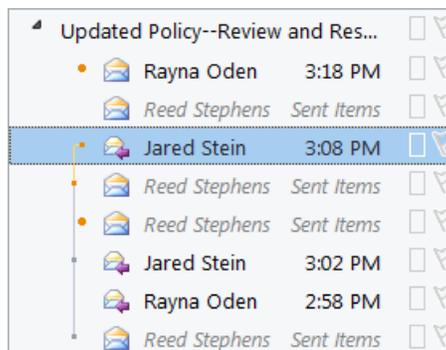


Figure 3-21: An expanded Conversation.

Receiving E-mail

- Click the **Triangle** icon (▾) to the right of the Conversation.

The Conversation expands and displays all messages in the Conversation. The most recent message appears at the top of the list.

- Select the specific message you wish to view.

The icons that appear to the right of the message indicate the relationships between messages in the conversation. See the table to the right, *Conversation Icons*, for more information about each icon.

Change Conversation settings

Changing Outlook's Conversation settings changes how Conversations are displayed.

- Click the **Mail** button in the Navigation Pane.

The Inbox appears.

- Click the **View** tab on the Ribbon and click the **Conversations Settings** button in the Conversations group.

A list of options appears:

- Show Messages From Other Folders
- Show Senders Above the Subject
- Always Expand Conversations
- Use Classic Indented View

- Select an option from the list.

The selected option is applied.

Table 3-3: Conversation Icons

Large orange dot	●	Separate branch of the Conversation.
Small orange dot	●	Selected message in the Conversation.
Grey dot	■	Message in the Conversation.
Grey italics	<i>Reed Stephens</i>	Message in the Conversation, stored in another folder.
Lines		The progression of messages in a selected Conversation or branch of a Conversation.



Figure 3-22: Changing Conversation Settings changes how Conversation View is displayed.

Managing Conversations

Conversations can clutter your Inbox. You can keep your Inbox tidy by ignoring conversations you don't want to read or by cleaning up a conversation.

Ignore a Conversation

Ignoring a conversation moves all current and future messages that are part of a selected conversation directly to your Deleted Items folder. When you receive a message from an ignored conversation, it is delivered to your Deleted Items folder.

1. Click the **Mail** button in the Navigation Pane.

The Inbox appears.

2. Click the conversation you wish to ignore.

The Conversation is selected.

 **Other Ways to Select a Conversation:**

Click any message within a conversation.

3. Click the **Home** tab on the Ribbon and click the **Ignore** button in the Delete group.

The Ignore Conversation dialog box appears.

 **Other Ways to Ignore a Conversation:**

Right-click the conversation you wish to ignore and select **Ignore** from the contextual menu. Or, press **<Ctrl> + **.

4. Click the **Ignore Conversation** button.

The Conversation is moved to the Deleted Items folder. Any future messages will automatically be delivered to the Deleted Items folder.

 **Tips**

- ü Conversations are grouped by subject. If any message recipient changes the subject of a message, then that message becomes a new conversation.

Clean Up a Conversation

Use Conversation Clean Up to evaluate your conversations and delete any redundant messages.

1. Click the **Mail** button in the Navigation Pane.

The Inbox appears.

2. Click the conversation you wish to clean up.

The conversation is selected.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Clean up a conversation.

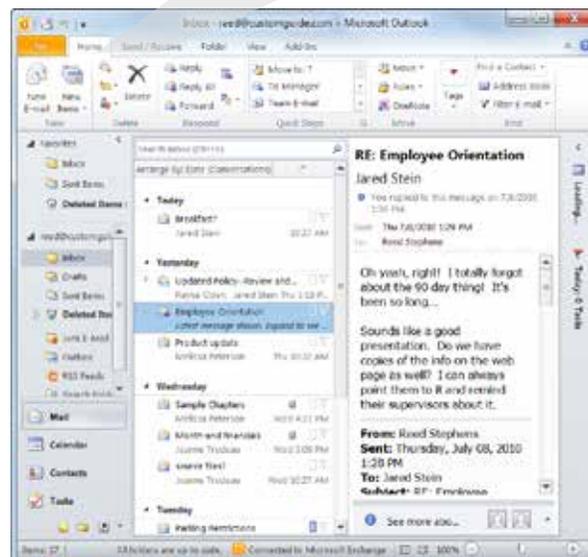
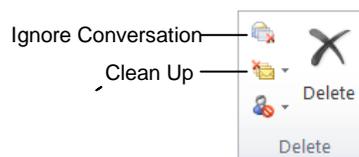


Figure 3-23: Manage your conversations using the Delete group on the Home tab of the Ribbon.

- **Other Ways to Select a Conversation:**
Click any message within a conversation.

3. Click the **Home** tab on the Ribbon and click the **Clean Up** button in the Delete group.

A list of Clean Up options appears.

- **Clean Up Conversation:** Evaluates the selected conversation.
- **Clean Up Folder:** Evaluates all conversations in the selected folder.
- **Clean Up Folder & Subfolders:** Evaluates all conversations in the selected folder as well as in any subfolders.

4. Select the Clean Up option you wish to use.

A dialog box appears warning you that all redundant messages will be moved to the Deleted Items folder.

- **Other Ways to Clean Up a Conversation:**
Right-click the message or conversation you wish to clean up and select **Clean Up Conversation** from the contextual menu.

5. Click **Clean Up**.

All redundant messages are moved to the Deleted Items folder.

✓ Tips

- ü Ignoring or cleaning up a conversation only moves the conversation and any related messages to the Deleted Items folder. If you change your mind, you can retrieve messages from the Deleted Items folder.

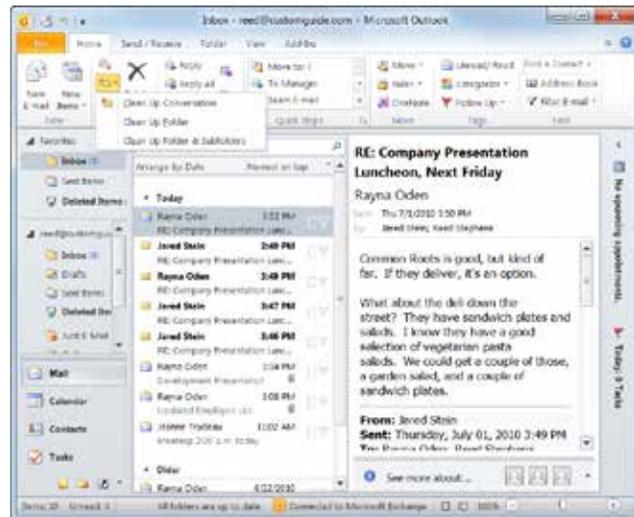


Figure 3-24: Use the Clean Up Conversation tool to delete redundant e-mails in an e-mail thread.

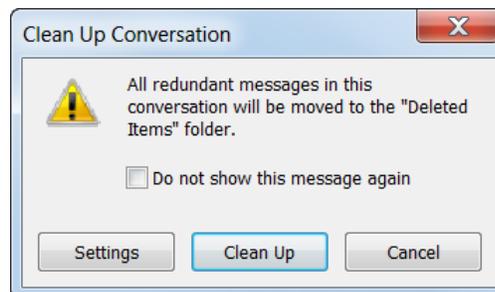


Figure 3-25: The Clean Up Conversation dialog box.

Sorting Messages

When your Inbox is jam-packed with messages, it can be difficult to find anything. When this happens, try sorting your messages using Outlook's arrangement options. You can sort your messages by the date they were sent, who sent them, and other attributes.

1. Click the **Mail** button in the Navigation Pane. The Inbox appears.

2. Click the **View** tab on the Ribbon and select an arrangement from the Arrangement group.

There are several arrangement options from which to choose. See the table on the next page, *Arrangement Options*, for a description of each option.

If you do not see the arrangement you want to choose, click the **More** button to view additional options.

- 🔍 **Other Ways to Sort Messages:**
In the Inbox, click **Arrange By** and select an option from the list.

✔ Tips

- 🔄 Use the Ascending/Descending button to the right of the Arrange By button to rearrange the messages in ascending or descending order.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Sort the messages in your Inbox by subject. Then, sort the messages in your Inbox by date.

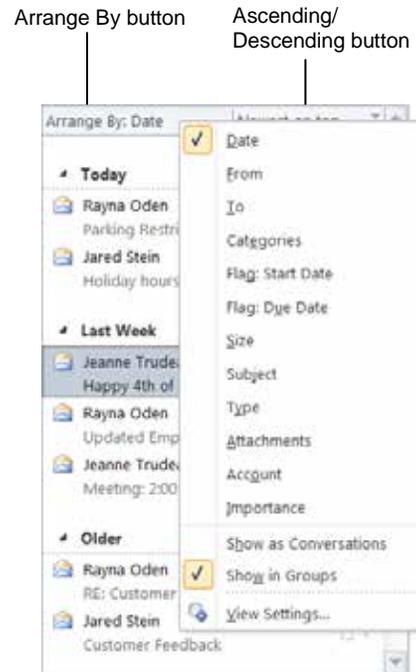


Figure 3-26: The Arrange By button in the Inbox is an easy way to sort messages.

Click the More  button to see additional options.

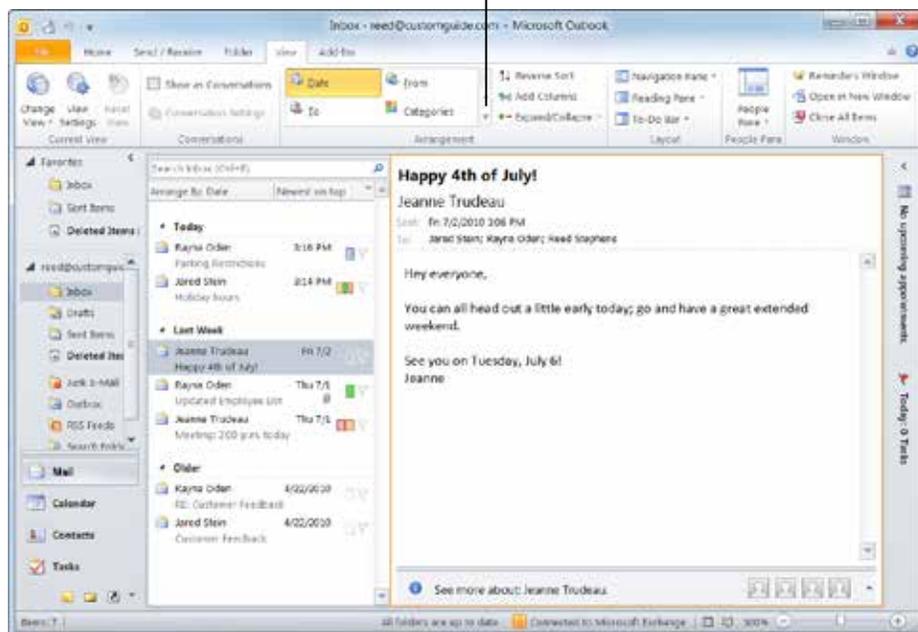
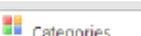


Figure 3-27: You can also change an arrangement by clicking the View tab and selecting an arrangement.

Table 3-4: Arrangement Options

 Date	Arranges messages by date, starting with today.
 Date (Conversations)	Arranges messages by conversation, then by date.
 From	Arranges message by sender.
 To	Arranges messages by recipient.
 Categories	Arranges messages by assigned categories.
 Flag: Start Date	Arranges flagged messages by their start date.
 Flag: Due Date	Arranges flagged messages by their due date.
 Size	Arranges messages by size, largest to smallest.
 Subject	Arranges messages alphabetically by subject.
 Type	Arranges messages by type.
 Attachments	Arranges messages by whether or not they have an attachment.
 Account	Arranges messages by e-mail account.
 Importance	Arranges messages by importance.

Changing Views

Changing a view lets you control the amount of information you see when you open your Inbox.

1. Click the **Mail** button in the Navigation Pane. The Inbox appears.
2. Click the **View** tab on the Ribbon and click the **Change View** button in the Current View group. A list of available views appears. See Table 3-5: Inbox Views for a description of each view.
3. Select a view from the list. The selected view is applied.

✓ Tips

- You can select different views for each Outlook folder.

Table 3-5: Inbox Views

Compact	Displays brief details about the message in the message list and displays the Reading Pane.
Single	Displays each message as one line in the message list and displays the Reading Pane.
Preview	Displays each message as one line in the message list and hides the Reading Pane.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Switch to Preview view. Return to Compact view.

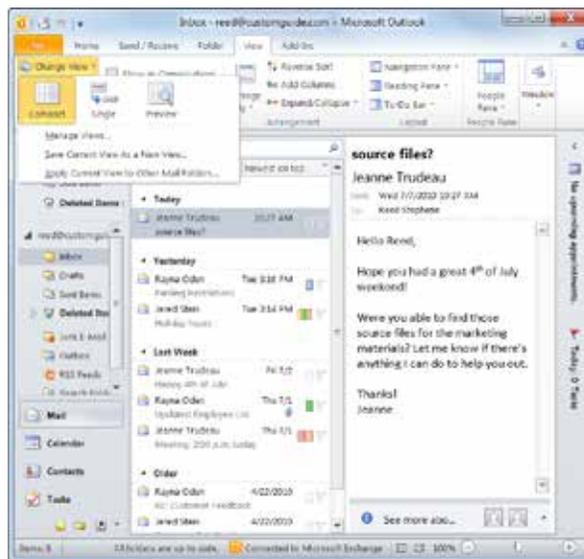


Figure 3-28: Click the Change View button for a list of views.

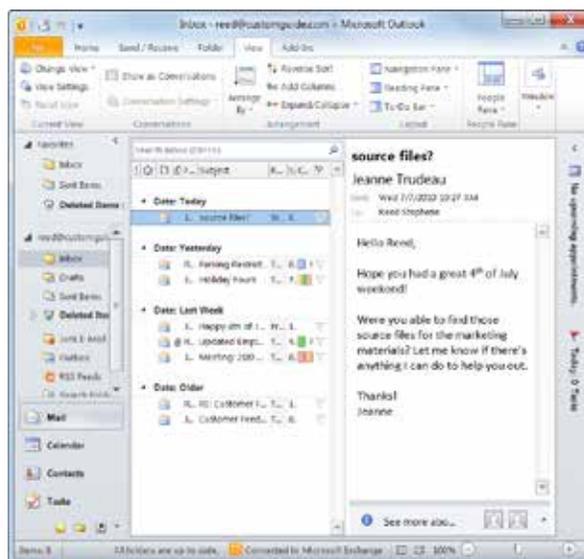


Figure 3-29: Single view displays a preview of the message in the Reading Pane, but displays the message information as a single line in the Inbox.

Printing a Message

Sometimes it can be refreshing to read a message in hard copy, especially if the message is long. Printing a message in Outlook is extremely easy.

Use the Print dialog box

If you want to control certain parts of the printing process, such as the number of copies you want to print, use the Print dialog box.

1. Click the **Mail** button in the Navigation Pane

The Inbox appears.

2. Select the message you want to print.

3. Click the **File** tab and select **Print**.

Backstage View appears. Notice that the print settings and a preview of the document appear together, with print settings on the left and a preview on the right.

Other Ways to Open Print Settings:
Press **<Ctrl> + <P>**.

4. Click the **Print Options** button.

The Print dialog box appears.

5. Specify the appropriate options in the Print dialog box and click **Print** to begin printing.

See Table 3-6: Print Options for a description of options in the Print dialog box.

Use Quick Print

If you're in a hurry, you can use Outlook's default print settings to Quick Print a message.

1. Click the **Mail** button in the Navigation Pane.
The Inbox appears.
2. Right-click the message you want to print and select **Quick Print** from the contextual menu.
The message is sent to the default printer.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Select a message in your Inbox and open the Print dialog box.

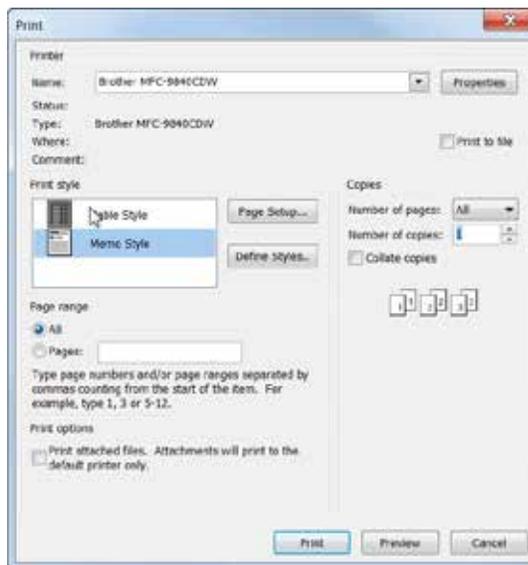


Figure 3-30: The Print dialog box.

Table 3-6: Print Options

Name	Select which printer you want to use.
Properties	Displays the Properties dialog box, where you can specify various printer options. These options vary by printer.
Number of pages	Specify if you want to print all pages, only even-numbered pages, or only odd-numbered pages.
Number of copies	Specify how many copies of the message you want to print.
Page Setup	Displays the Page Setup dialog box, where you can add a Header/Footer, change page size, etc.
Page range	Specify which pages you want to print.
Print options	Depending on the item you are trying to print, this section offers additional options.
Preview	Click here to display a preview of the message in Backstage view.

Receiving E-mail Review

Quiz Questions

22. Outlook checks for new messages every ___ minutes by default.
- A. 10
 - B. 30
 - C. 5
 - D. 3
23. Clicking a message in the Inbox opens it in its own window. (True or False?)
24. If you want to reply to the author of a message and everyone else who received the message, which button should you click?
- A. Forward
 - B. Reply
 - C. Reply All
 - D. You can only send an e-mail to one recipient.
25. Attachment Preview is only supported by messages that are in HTML or Plain Text format. (True or False?)
26. If you're going to be making changes to an attachment, you need to:
- A. save the attachment.
 - B. open the attachment.
 - C. preview the attachment.
 - D. None of the above.
27. Which of the following is NOT true?
- A. When you delete a message in Outlook, it will never be seen again.
 - B. When you empty the Deleted Items folder, its contents are permanently deleted.
 - C. You can retrieve a message from the Deleted Items folder.
 - D. You can delete a message by pressing the <Delete> key.
28. What is the default flag type?
- A. Today
 - B. Tomorrow
 - C. This Week
 - D. Next Week
29. Only one category can be assigned to a message at a time. (True or False?)
30. Conversation View groups e-mails with the same _____.
- A. Sender
 - B. Recipient
 - C. Attachment
 - D. Subject

31. When you ignore a conversation, all current and future messages are moved to the Junk folder. (True or False?)
32. Which of the following statements is NOT true?
A. You can sort your messages by the date they were sent, who sent them, and more.
B. Sorting your messages simply arranges them in different ways, making information easier to find.
C. Sorting your messages saves them in different folders.
D. You can sort messages using the Arrange By button in the Inbox.
33. Which of these is NOT a view in Outlook 2010?
A. Compact
B. Detailed
C. Single
D. Preview
34. The fastest way to print a message is using the Print dialog box. (True or False?)

Quiz Answers

22. B. Outlook checks for new messages every 30 minutes by default.
23. False. *Double*-clicking a message in the Inbox opens the message in its own window.
24. C. Click Reply All to send your reply to the author of the message as well as anyone who received the message.
25. True. Attachment Preview is only supported by messages that are in HTML or Plain Text format.
26. A. If you're going to be making changes to an attachment, you need to save the attachment first.
27. A. When you delete a message in Outlook, you can retrieve it from the Deleted Items folder. It is not permanently deleted.
28. A. The default flag type is *Today*.
29. False. You can assign as many categories as you want to a message.
30. Conversation View groups e-mails with the same subject.
31. False. When you ignore a conversation, all current and future messages are moved to the Deleted Items folder.
32. C. Sorting your messages simply rearranges them; it doesn't save them in different folders.
33. B. The three views available in Outlook 2010 are Compact, Single, and Preview; Detailed is not an available view.
34. False. The fastest way to print a message is using Quick Print.

More E-mail Features

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If you've gotten this far, you undoubtedly know how to send and receive e-mails, reply to and forward e-mails, and probably even how to attach files to an e-mail. So, what else is there? This chapter is all about Outlook's more advanced e-mail features.

In this chapter, you will learn how to save an unfinished e-mail message to the Drafts folder so that you can come back and finish it later. You'll also learn how to use the Out of Office Assistant to notify people that you will be away from your computer for several days and cannot respond to their e-mails immediately. Finally, you'll learn all about how to format your e-mail messages by using different message formats, signatures, and stationery.

Saving Unfinished Messages (Drafts)

If you get interrupted while composing an e-mail message, all is not lost; you can save the unfinished message and return to it later.

Save an unfinished message

1. Begin writing a new message.
2. In the message window, click the **File** tab on the Ribbon and select **Save**.

Outlook saves the unfinished message to the Drafts folder.

- **Other Ways to Save a Message:** Click the **Save** button on the Quick Access Toolbar. Or, press **<Ctrl> + <S>**.

Open a saved message

It's easy to return to an unfinished message.

1. In the Outlook program window, click the **Mail** button in the Navigation Pane.
2. Click the **Drafts** folder.
A list of unfinished messages appears.
3. Double-click the message you want to finish.
The message opens in its own window, exactly how you left it.

✓ Tips

- Once a draft is sent, it is removed from the Drafts folder.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Create a new message to yourself with “Practice” in the Subject field and the text “I’ll finish this message later” in the message body area.

Save a draft of this message and close the message window. Open the Drafts folder and double-click the “Practice” message.

Send the message.

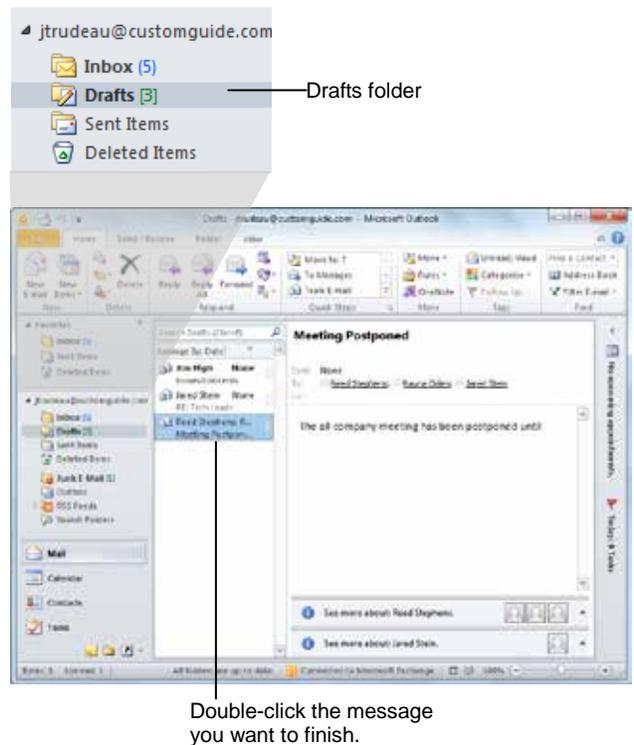


Figure 4-2: Opening an unfinished message that has been saved to the Drafts folder.

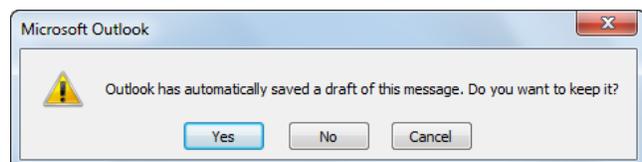


Figure 4-1: Anytime a message is closed unexpectedly, without being saved after editing, Outlook asks if you would like to save it.

Recalling a Message

Sometimes you might forget to attach a file to a message, or send a message to the wrong person(s). When this happens, you can recall the message – provided the following conditions are met:

- The message is unread.
- The message is sent to someone in your organization. You cannot recall messages sent to people outside your organization.

1. Click the **Mail** button in the Navigation Pane.

The Mail folder appears.

2. Click the **Sent Items** folder in the Navigation Pane and double-click the message that you want to recall.

The message opens in its own window.

3. On the Ribbon, click the **More Move Actions** button in the Move group and select **Recall This Message**.

The Recall This Message dialog box appears. There are two options for recalling a message:

- **Delete unread copies of this message:** If the message is still unread, the message is deleted. A notification that the message was recalled is left for the recipient.
- **Delete unread copies and replace with a new message:** The unread message is deleted and replaced with a new message.

4. Choose how you would like to recall the message and click **OK**.

The message is recalled.

5. (Optional) If you chose to replace the recalled message with a new message, make your edits as necessary and click **Send**.

The recalled message appears.

6. Click the **Close** button to close the recalled message.

To see if your recall was successful, check your Inbox for a notification, as shown in Figure 4-4.

& Exercise

- **Exercise File:** Create a new message to yourself with “Practice” in the Subject field and the text “I’ll finish this message later” in the message body area. Send the message.
- **Exercise:** Recall the Practice message and delete unread copies of the message.



Figure 4-3: Recalling a message.

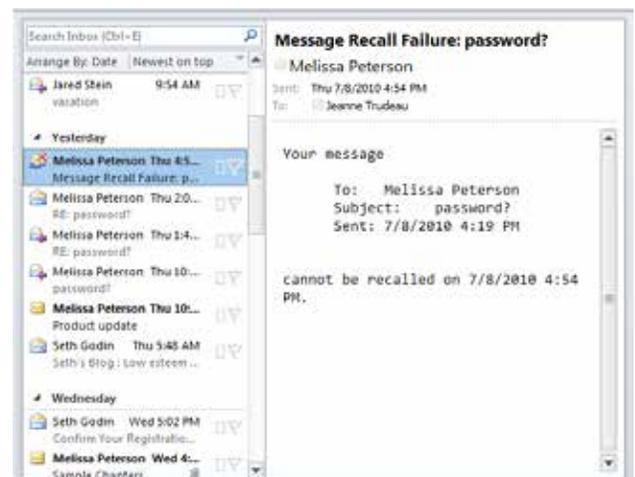


Figure 4-4: After you recall a message, a notification appears in your Inbox to let you know whether or not the recall was successful.

Resending a Message

If someone doesn't remember getting a message, or you find that you want to send a message to more people, you can resend a message you've already sent. This command also lets you revise text and change recipients.

1. Click the **Mail** button in the Navigation Pane.
2. Click the **Sent Items** folder.

All messages that you have previously sent are listed here.

3. Double-click the message you want to resend.

The message opens in its own window.

4. Click the **More Move Actions** button in the Actions group and select **Resend This Message**.

The message opens in another window where you can edit the message, or add and change recipients.

5. Finalize the message and click **Send**.

The message is sent to the specified recipients.

& Exercise

- **Exercise File:** Any sent message.
- **Exercise:** Resend a message from the Sent Items folder.

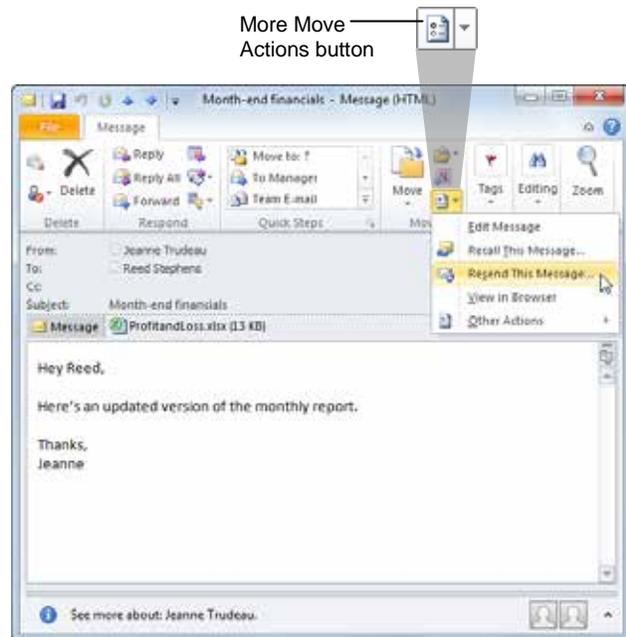


Figure 4-5: Resending a message.

Using the Out of Office Assistant

If you know that you're going to be out of the office for a few days, it's a good idea to set up the Out of Office Assistant. The Out of Office Assistant sends an automatic response to any messages you receive while you're away.

Trap: The Out of Office Assistant only works if you are using Microsoft Exchange.

If you are using Microsoft Exchange Server 2007 or 2010, you have access to several Out of Office features not available in previous versions:

- **Rich text formatting:** Now you can apply fonts, colors and formatting to your replies.
- **Customization:** Now your replies can be customized based for recipients both inside and outside your organization. For example, you could specify that your co-workers receive a different message than your clients.
- **Start and stop time:** Tired of forgetting to turn off the Out of Office Assistant? Now you can apply a start and stop time in advance.

1. Click the **File** tab on the Ribbon. Info is selected.
2. Click the **Automatic Replies** button. The Out of Office Assistant dialog box appears.
3. Click the **Send automatic replies** option.
4. (Optional) Click the **Only send during this time range** check box and specify the time range to which you want messages to be replied.

If you don't specify a time range, the automatic replies will begin immediately upon closing the dialog box.

Now enter the text that will appear in your auto-reply.

5. Type your auto-reply on the **Inside My Organization** and/or **Outside My Organization** tab. Common auto-reply messages include information about the amount of time you are out, and who can be reached with questions.
6. Click **OK**. The Out of Office Assistant will begin to reply to your messages when Outlook is closed.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Open the Out of Office Assistant dialog box. Take a look at the options available in this dialog box, and then close it.

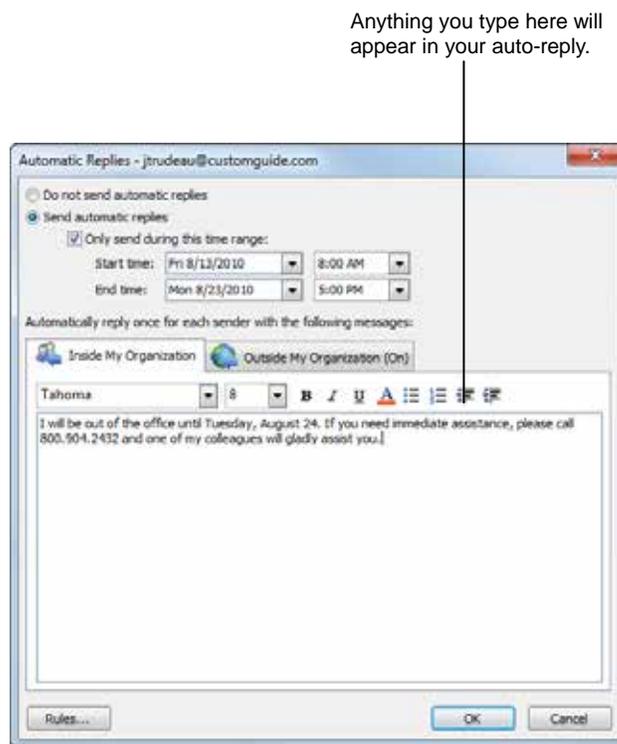


Figure 4-6: The Automatic Replies dialog box.

Turn off the Out of Office Assistant

If you don't specify a time range for automatic replies, the next time you open Outlook, a dialog box will appear asking if you want to turn off the assistant.

1. Open Microsoft Outlook.

A dialog box appears, asking if you want to turn the Out of Office Assistant off.

2. Click **Yes** to deactivate the Out of Office Assistant.

Delaying Sending a Message

Your message is written, but you don't want it to go out quite yet. Maybe you're waiting for a check to clear, or you want to send a message on someone's birthday, or want your co-workers to think you really did come in to work on Saturday. Whatever the reason, you don't have to wait by the clock to hit the Send button; instead, delay sending the message.

If you have a single message ready to go, but you don't want to deliver it until tomorrow, you can tell Outlook exactly when it needs to be sent.

1. Create a new message.

A new message window appears.

2. Click the **Options** tab on the Ribbon and click the **Delay Delivery** button in the More Options group.

The Properties dialog box appears.

3. Make sure the "Do not deliver before" check box is selected in the Delivery options area.

This should be selected for you.

4. Click the **Date** and **Time** list arrows and select when the message should be sent.

✔ **Tip:** If you'd like the message to expire after a certain amount of time, click the **Expires After** check box and set a date and time for the message to expire.

5. Click **Close**.

The message closes and will be sent after the prescribed delay.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Delay a single message so it does not go out for three days.

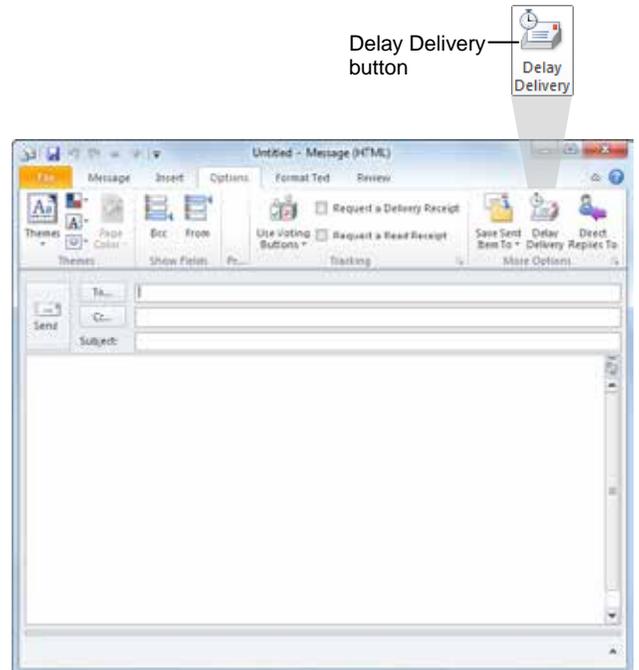


Figure 4-7: The Delay Delivery button is in the Options tab on the Ribbon.

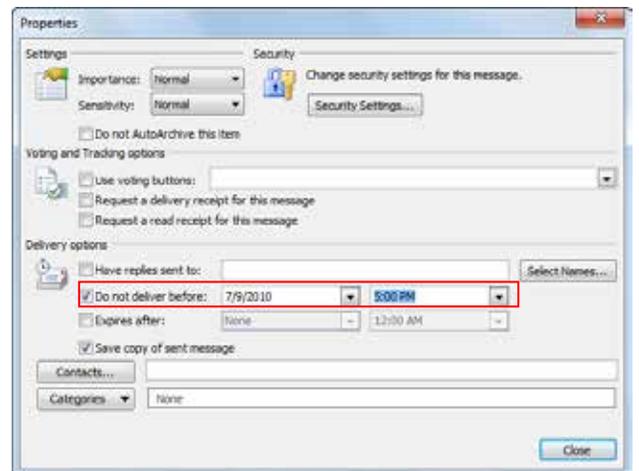


Figure 4-8: Choose a date and time to send a message in the Message Options dialog box.

Using Quick Steps

New in Outlook 2010, quick steps allow you to perform multiple tasks with a single click. You can customize the default quick steps or create your own.

Use a quick step

Quick steps are a great way to quickly work on common tasks, such as e-mailing a manager or team!

1. Click the Home tab of the Ribbon and click the quick step you want to use in the Quick Steps group.

The quick step is applied.

✓ Tips

- ü If this is your first time using a particular quick step, the First Time Setup dialog box appears.

Customize a default quick step

Outlook comes with several default quick steps, as described in the table to the left, *Default Quick Steps*. Some of these steps require additional set up, such as designating a folder to store items or a manager to receive e-mails.

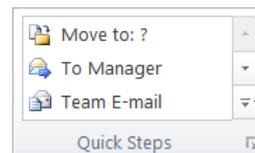
1. Click the **Mail** button in the Navigation Pane. The Inbox folder appears.
2. Click the **Home** tab on the Ribbon and click the **More** button in the Quick Steps group. A list of quick step options appears.
3. Select **Manage Quick Steps** from the list. The Manage Quick Steps dialog box appears.
 - **Other Ways to Open the Manage Quick Steps dialog box:** Click the **Dialog Box Launcher** in the Quick Steps group on the Home tab of the Ribbon.
4. Select the Quick Step you want to change in the Quick Step box and click the **Edit** button. The Edit Quick Step dialog box appears. You can modify existing actions or add additional actions to a Quick Step in the Edit Quick Step dialog box.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Customize the “Move to” Quick Step to move messages to the Sent Items folder.

Table 4-1: Default Quick Steps

	Move to	Moves the selected message to a folder that you specify and marks the message as read.
	Team E-mail	Creates a new message and automatically inserts specified team members in the “To” field.
	Reply & Delete	Replies to the sender and deletes the original message.
	To Manager	Forwards the selected message to a person that you specify.
	Done	Marks the selected message as complete / read and moves it to a folder that you specify.
	Create New	Select this option to create your own Quick Step.



Click the More button to view additional options.

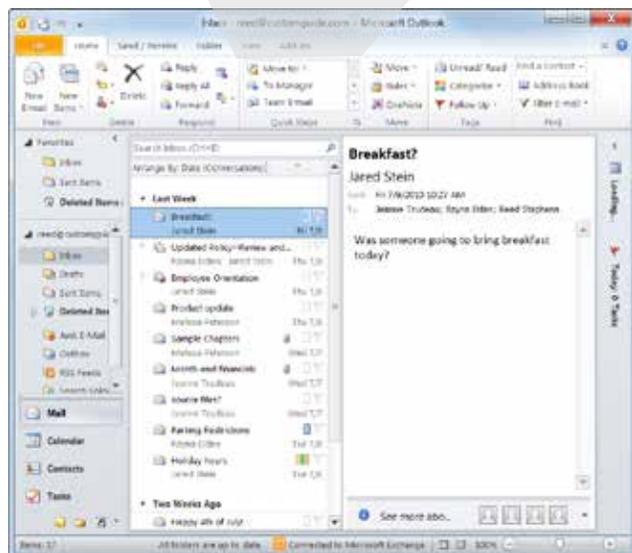


Figure 4-9: Select a Quick Step or manage your quick steps from the Quick Steps group on the Home tab of the Ribbon.

5. Edit the quick step as necessary and click **Save**.

Create your own quick step

If you maintain multiple folders, correspond with multiple teams, or have multiple people with whom you regularly communicate, you can create additional quick steps for each action.

1. Click the **Mail** button in the Navigation Pane.

The Inbox appears.

2. Click the **Home** tab on the Ribbon and select **Create New** in the Quick Steps group.

The Edit Quick Step dialog box appears.

Other Ways to Open the Edit Quick Step Dialog Box:

Click the **More** button in the Quick Steps group on the Home tab of the Ribbon, select **New Quick Step** from the list, and select the type of quick step you want to create.

3. Enter a name for the Quick Step.

It can be helpful to name a Quick Step based on the task it performs; for example, the name for a Quick Step that automatically forwards an e-mail to your manager might be “To Manager”.

4. Click the **Actions** list arrow and select the action you want the quick step to do.

There are several kinds of actions you can take with a message, as explained in the table to the right, *Quick Step Actions*.

5. Enter additional options for the quick step and click **Save**.

The new quick step has been created and appears in the Quick Steps group on the Home tab of the Ribbon.

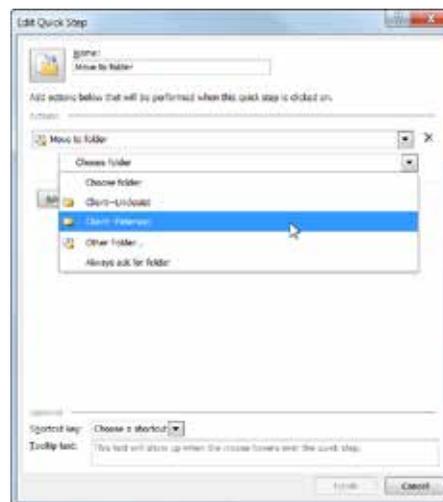


Figure 4-10: You can further specify an action in the Edit Quick Step dialog box.

Table 4-2: Quick Step Actions

Filing	Specify the folder where you wish to store messages, move messages to the Deleted Items folder, or permanently delete messages.
Change Status	Mark a message as read or unread, or change the importance of a message.
Categories, Tasks and Flags	Categorize a message, clear a message of pre-set categories, flag a message for follow-up, or create a task.
Respond	Create a new message, reply to a message, reply to all recipients of a message, or forward a message.
Appointment	Create a meeting or appointment.
Conversation	Move or ignore all messages in a particular conversation.

Inserting a Signature

A *signature* is boilerplate text or a file that can be attached to an e-mail message. Your signature appears at the bottom of any new messages you compose and can include such things as:

- Your name, title, and organization
- Your phone and fax number
- Your address
- A link to your Web page
- Your organization’s mission statement, a witty one-liner, or your favorite quote

Create a signature

1. Create a new message.

A new message window appears.

2. Click the **Message** tab on the Ribbon. Click the **Signature** button in the Include group and select **Signatures**.

The E-mail Signature tab of the Signatures and Stationery dialog box appears.

3. Click the **New** button.

The New Signature dialog box appears.

4. Enter a name for the signature and click **OK**.

Now create the signature as you want it to appear.

5. Type the text that you want to appear in the signature in the **Edit signature** area.

6. Format the signature as desired.

Use the toolbar of common text formatting commands to change text. You can also add a picture or hyperlink to the signature using the Picture and Insert Hyperlink buttons.

7. (Optional) Insert pictures or hyperlinks.

8. Click **OK**.

The next time you create a new message, your signature will appear at the bottom of the message.

Tip: You can create more than one signature in Microsoft Outlook. For example, you might want to use one signature for professional correspondence and another for personal.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Create a new signature named “Practice”. Type “Jeanne Trudeau” in the Edit signature field. Press <Enter> and type “Director of Business Development”.

Apply boldface formatting to “Jeanne Trudeau,” and italicize “Director of Business Development.” Close the dialog boxes to finish creating the signature.

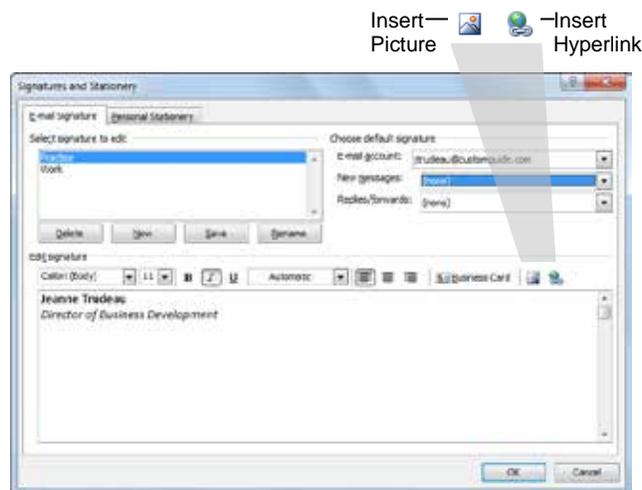
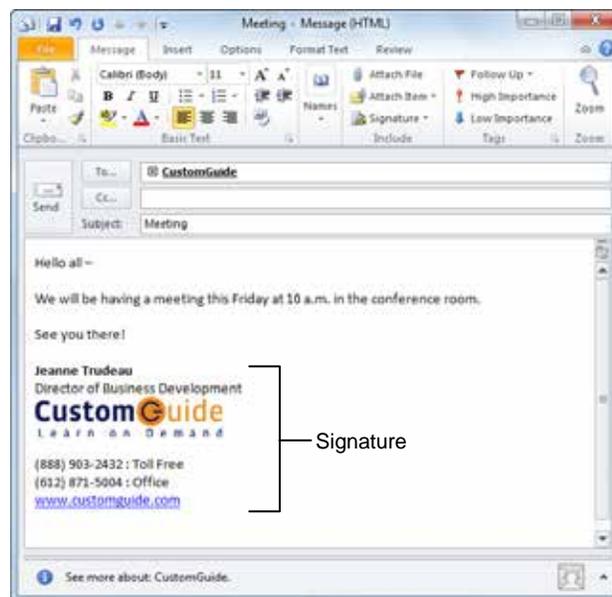


Figure 4-11: The Signatures and Stationery dialog box.



Set signature defaults

If you want your signature to appear at the bottom of every message, set it as your default signature.

1. Open a new message.

A new message window appears.

2. Click the **Message** tab on the Ribbon. Click the **Signature** button in the Include group and select **Signatures**.

The Signatures and Stationery dialog box appears.

Other Ways to Open the Signatures and Stationery Dialog Box:

In the message window, click the **Insert** tab on the Ribbon and click the **Signature** button in the Include group. Select **Signatures** from the menu.

3. Specify how you want to use the signature in the “Choose default signature” section.

Take a look at Table 4-3: Choose Default Signature Options for a description of each option.

4. Click **OK**, then click **OK** again to save your changes.

Insert a signature manually

If you want to insert a different signature, or you don't have a default signature, you can also insert signatures manually.

1. Create a new message.

A new message window appears.

2. In the Message window, click the **Insert** tab on the Ribbon.

3. Click the **Signature** button in the Include group and select the signature you want to insert from the list.

The signature is inserted into the message.

Table 4-3: Choose Default Signature Options

E-mail account	Select the account for which you want to assign the signature.
New messages	If you have created multiple signatures, click this list arrow to select the signature you want to include in new messages. Select (none) if you don't want to insert a signature automatically.
Replies/forwards	If you would like your signature to appear at the bottom of forwarded messages and replies, click the list arrow and select the signature you want to use.

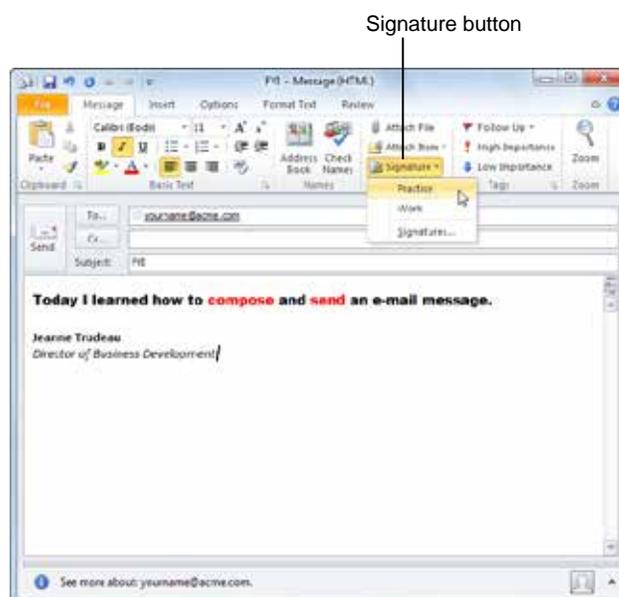


Figure 4-13: To manually insert a signature, click the Signature button in the Include group of the Message tab and select a signature from the list.

Using Stationery and Themes

You can customize your e-mail messages in Outlook using stationery and themes. Below is a quick description of each.

- **Stationery:** A pattern or design that can be applied to the background of a message.
- **Themes:** A theme is a set of unified design elements (background color, bullet style, font type, etc.) that you can apply to a message.

✓ Tips

- ü You can only use stationery and themes if your e-mail messages are in HTML format.

Apply stationery and themes to all messages

1. Click the **File** tab and select **Options** from the menu.
The Outlook Options dialog box appears.
2. Click the **Mail** tab and click the **Stationery and Fonts** button.
The Signatures and Stationery dialog box appears.
3. Click **Theme**.
The Theme or Stationery dialog box appears.
4. Select the stationery or theme you want to use. Click **OK** for all open dialog boxes.

All future messages you compose will use the selected stationery or theme.

- ✓ **Tip:** To remove a stationery or theme, select **No Theme** in the Theme or Stationery dialog box.

Apply stationery and themes to a single message

1. Click the **New Items** button in the New group on the Home tab and select **E-mail Message Using ® More Stationery** from the list.
The Theme or Stationery dialog box appears.
2. Select the stationery or theme you want to use and click **OK**.

A new message, with the selected stationery or theme applied, appears.

& Exercise

- **Exercise File:** None.
- **Exercise:** Create a new message with the Notebook stationery. Locate the Themes group on the Options tab of the Ribbon. Close the message.

Select the stationery or theme you want to use.

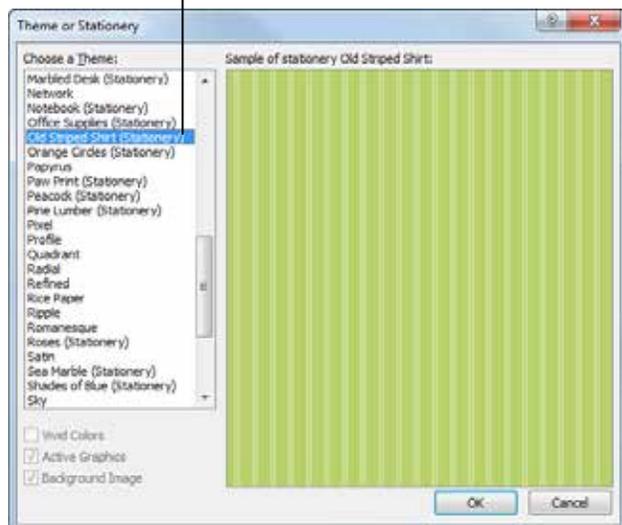


Figure 4-14: The Theme or Stationery dialog box.

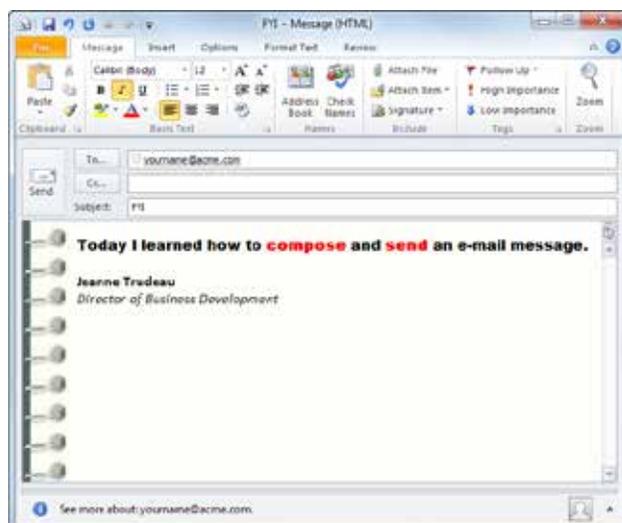


Figure 4-15: A message with the “Notebook” stationery applied.

Apply an Office theme to a message

In addition to Outlook themes, you can also apply Office 2010 themes to your messages. Office 2010 themes are similar to Outlook themes but consist of fonts and styles that represent Office 2010.

1. In the message window, click in the message body.
2. Click the **Options** tab on the Ribbon and click the **Themes** button in the Themes group.

The Themes gallery appears.

3. Click the theme you want to apply.

The formatting associated with the selected theme is applied to the message.

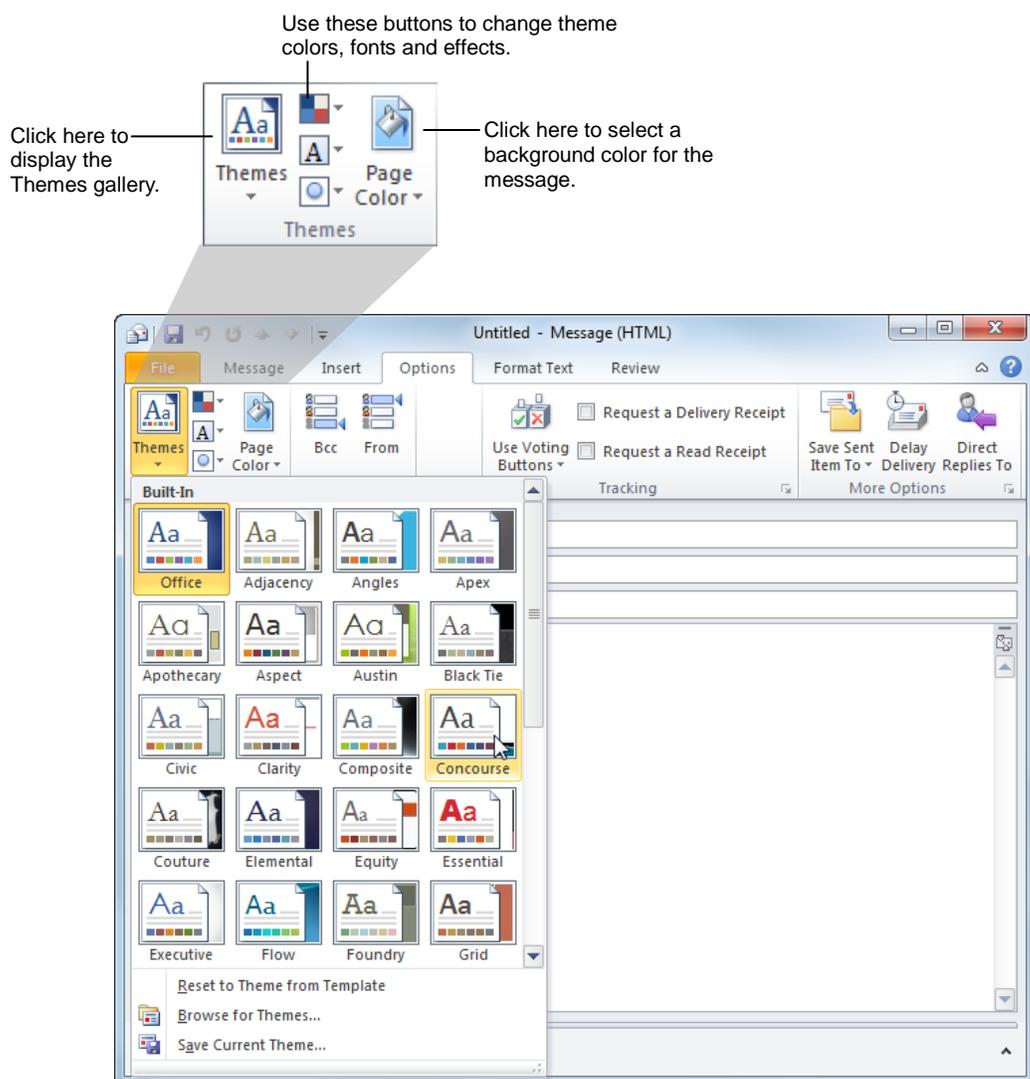


Figure 4-16: You can use the Themes group on the Options tab of the Ribbon to select a theme.

Changing Message Format

Microsoft Outlook can read and create messages in three different formats: HTML, Rich Text, and Plain Text. This lesson will explain each of these three formats and show you how to change formats.

Change the format of a single message

If you want to change the format of an individual message, change the message format manually.

1. Create a new mail message.
A message window opens.
2. Click the **Format Text** tab on the Ribbon.
The three message formats are displayed in the Format group. See Table 4-4: Message Formats for a description of each format.
3. Select the message format you want to use.
The format is applied to the message.

Change the format of all messages

If you want to change the format of all future messages, change the default message format.

1. Click the **File** tab on the Ribbon and select **Options**.
The Outlook Options dialog box appears.
2. Click the **Format Text** tab on the Ribbon.
The Options dialog box appears.
3. Click the **Mail** tab.
4. Under the Compose Message section, click the **Compose messages in this format** list arrow.
A list of message formats appears. See Table 4-4: Message Formats for a description of each format.
5. Select a message format from the list and click **OK**.
Now every new message will be created in the selected format.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Make sure HTML is the default format of Outlook messages.

Table 4-4: Message Formats

HTML	<p>HTML messages can contain formatting and are compatible with most e-mail programs.</p> <ul style="list-style-type: none"> • Pros: Compatible with most e-mail programs. • Cons: Some recipients may not be able to handle HTML formatting. For example, the formatted text you see in your message window will appear as plain text or unrecognizable characters to your recipients.
Rich Text	<p>Rich Text messages can contain formatting but are only compatible with Microsoft Outlook and Microsoft Exchange.</p> <ul style="list-style-type: none"> • Pros: Allows for some formatting. • Cons: Rich-formatted messages are only compatible with Microsoft Outlook and Microsoft Exchange.
Plain Text	<p>Plain Text messages can be read by everyone but can't contain formatting.</p> <ul style="list-style-type: none"> • Pros: Understood by all e-mail programs. • Cons: No formatting options.

Click here to change the default message format.

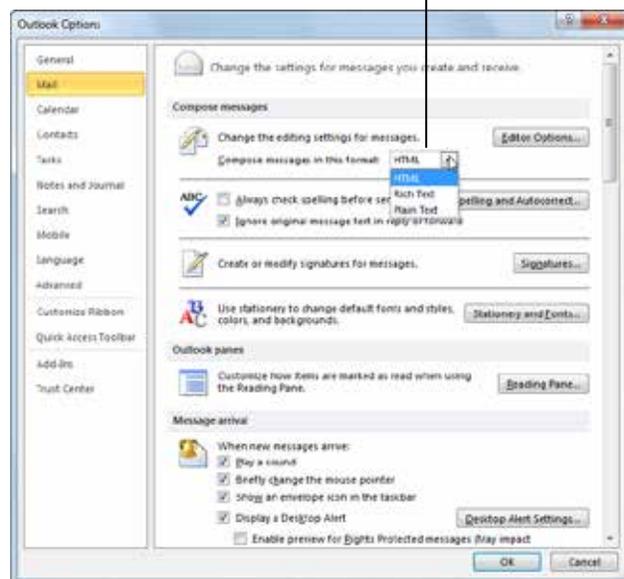


Figure 4-17: Changing the default message format.

Dealing with Junk E-mail

Tried and true real estate and/or love secrets from the world's foremost expert!

\$3.2 Billion gift card from your favorite restaurant for completing our survey!

tHoUsAnDz of XXX pHoToZ and vIdEoZ – FREE!!!

Unsolicited mail, known as spam, is easily the most annoying aspect of e-mail, and it's increasing at an alarming rate. When you get unwanted mail, Outlook 2010 will automatically filter it into a separate folder, based on the content and structure of the message. It doesn't catch all spam, and occasionally a good message will end up in the Junk E-Mail folder, so it's a good idea to understand how Outlook deals with spam.

Open the Junk E-Mail folder

All junk e-mail is sent to this folder. Even if your junk e-mail filter is set to low, it's a good idea to check this folder from time to time to make sure messages that you want aren't accidentally sent here.

1. Click the **Mail** button in the Navigation Pane and select the **Junk E-Mail** folder.

The contents of the folder are displayed. All the messages in this folder are flagged as junk e-mail.

Change Junk E-mail filter settings

The Junk E-mail filter determines which messages are junk. If the filter is set to high, anything that is remotely suspicious is considered junk. If the filter is turned off, you will probably get loads of junk messages in your Inbox.

1. In the program window, click the **Home** tab on the Ribbon and click the **Junk** button in the Delete group.

A list of options for setting junk e-mail appears.

2. Select **Junk E-mail Options** from the list.

The Junk E-mail Options dialog box appears. There are four levels of junk e-mail protection available.

- **No Automatic Filtering:** All e-mail is moved to the Junk E-mail folder, including e-mail from blocked senders.
- **Low:** Only the most obvious junk e-mail messages are moved to the Junk E-mail folder.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Change the junk e-mail filter settings to High.

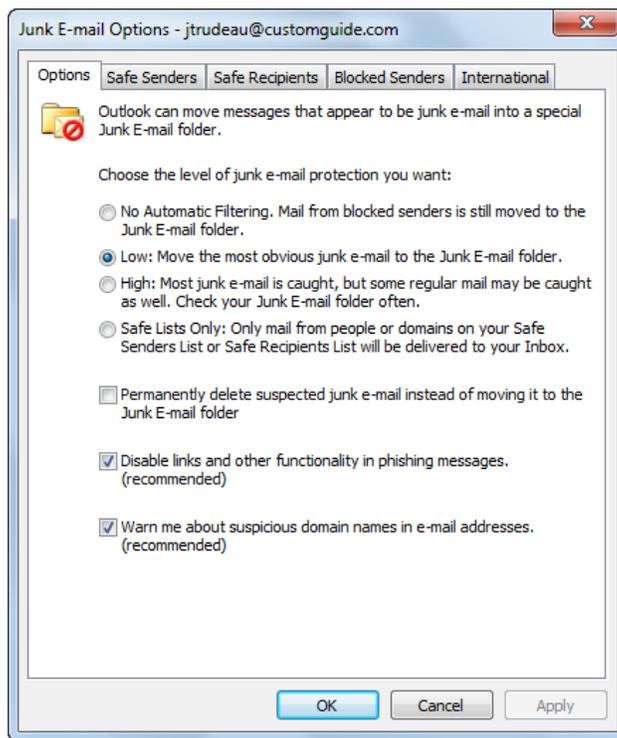


Figure 4-18: The Junk E-mail Options dialog box

- **High:** Most junk e-mail is sent to the junk e-mail folder, but some regular mail may be caught as well.
- **Safe Lists Only:** All mail that does not come from your Safe Senders list will be sent to the junk e-mail folder.

3. Select the level of Junk E-mail protection that you want.

You can also use the check boxes here to specify how Outlook deals with junk e-mail:

- **Permanently Delete Junk E-mail:** Delete all junk mail without viewing it, although this would mean there was no way for you to know if good mail was deleted as well,
- **Disable Phishing Links:** Disable links from messages that appear fraudulent so you don't give your personal information to the wrong person,
- **Warn About Suspicious Domain Names:** Receive warnings when you receive mail from suspicious addresses, and
- **Postmark Messages:** Add postmarks to help verify that the messages you send are authentic.

4. Click **OK**.

The dialog boxes close and the changes are applied to junk e-mail protection.

 **Tips**

- Ü The junk e-mail filter is a good way to deal with spam, but you can also use the tips in Table 4-5: Techniques for Avoiding Spam to reduce the amount of spam you receive in the first place.

Table 4-5: Techniques for Avoiding Spam

Use a disposable e-mail address for mass mailings, like newsletters or advertisements.	Get a free e-mail address from Hotmail, Yahoo, or another service and use that for making online purchases and registering web accounts.
Look out for newsletter offers.	When you sign up for a product or service, look out for pre-checked boxes that say "Yes, send me more information" and uncheck them.
Use AntiSpam software.	Third-party commercial products like McAfee SpamKiller, Norton AntiSpam, Vipre, and SpamNet can be more effective than Windows Mail for filtering out junk e-mail.
Don't publish your e-mail address as a link online.	If you include spaces around the @ in your e-mail address, it will not automatically become a hyperlink, and address-seeking programs will be less likely to find it.
Never reply to spam.	Unless you are removing yourself from a mailing list that you personally signed up for, any response will only tell spammers that your address is valid, making you a target for more spam.

Adding Addresses to the Safe and Blocked Senders List

The filtering system in Outlook 2010 is good, but it's not perfect. Sometimes spam finds its way into your inbox and sometimes e-mail from Mom gets kicked into the Junk E-Mail folder. You can minimize these instances with the Safe Senders List and the Blocked Senders List.

Add addresses to the Safe Senders List

When an address or domain is added to the Safe Senders list, none of the messages from that address or domain will be sent to the Junk E-mail folder.

1. In the program window, click the **Home** tab on the Ribbon and click the **Junk** button in the Delete group.

2. Select **Junk E-mail Options** from the list.

The Junk E-mail Options dialog box appears.

3. Click the **Safe Senders** tab.

The Safe Senders tab appears.

Tip: By default, all addresses listed in your Address Book are regarded as Safe Senders so you don't need to add them here. If you don't want this to be the case, you can clear the "Also trust e-mail from my Contacts" check box.

4. Click **Add**.

The Add Address or Domain dialog box appears. You can add an individual e-mail address, or a domain name. If you add a domain name (i.e. @acme.com), all e-mail sent from that domain is safe.

5. Type an e-mail address or domain name and click **OK**.

The address or domain name is added to the Safe Senders List.

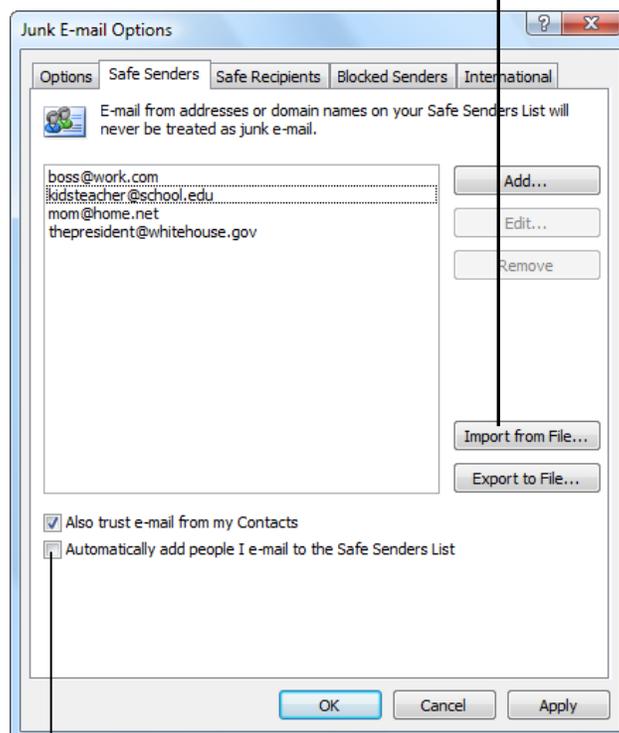
Other Ways to Add Addresses to the Safe Senders List:

Right-click the message and select **Junk @ Never Block Sender** or **Never Block Sender's Domain (@example.com)** from the contextual menu. Or, select the message, click the **Junk** button in the Delete group and select **Never Block Sender** or **Never Block Sender's Domain (@example.com)** from the list.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Add the following e-mail addresses to your Safe Senders list:
boss@work.com
kidsteacher@school.edu
mom@home.net

Click the Import from File button to choose a .txt document that lists e-mail addresses you'd like to add (separated by commas).



Select this check box to add anyone you e-mail to the Safe Senders List.

Figure 4-19: The Safe Senders tab in the Junk E-mail dialog box.

Add addresses to the Blocked Senders List

If you continue to get unwanted e-mail from the same addresses, add them to the Blocked Senders List. Messages from the address or domain immediately end up in the Junk Mail folder.

1. In the program window, click the **Home** tab and click the **Junk** button in the Delete group.
2. Select **Junk E-mail Options** from the list and click the **Blocked Senders** tab.
4. Click **Add**.
5. Type in an e-mail address or domain name and click **OK**.

The address or domain name is added to the Blocked Senders List.

Other Ways to Add Addresses to the Blocked Senders List:

Right-click the message and select **Junk ® Block Sender** from the contextual menu. Or, select the message, click the **Junk** button in the Delete group and select **Block Sender** from the list.

Add addresses to the Safe Recipients List

If you belong to mailing lists or distribution lists, you can add the list sender to your Safe Recipients List so that any messages sent to these e-mail addresses or domain names will never be treated as junk.

1. In the program window, click the **Home** tab and click the **Junk** button in the Delete group.
2. Select **Junk E-mail Options** from the list and click the **Safe Recipients** tab.
3. Click **Add**.
4. Type an e-mail address or domain name and click **OK**.

The address or domain name is added to the Safe Recipients List.

Other Ways to Add Addresses to the Safe Recipients List:

Right-click the message and select **Junk ® Never Block this Group or Mailing List** from the contextual menu. Or, select the message, click the **Junk** button in the Delete group and select **Never Block this Group or Mailing List** from the list.

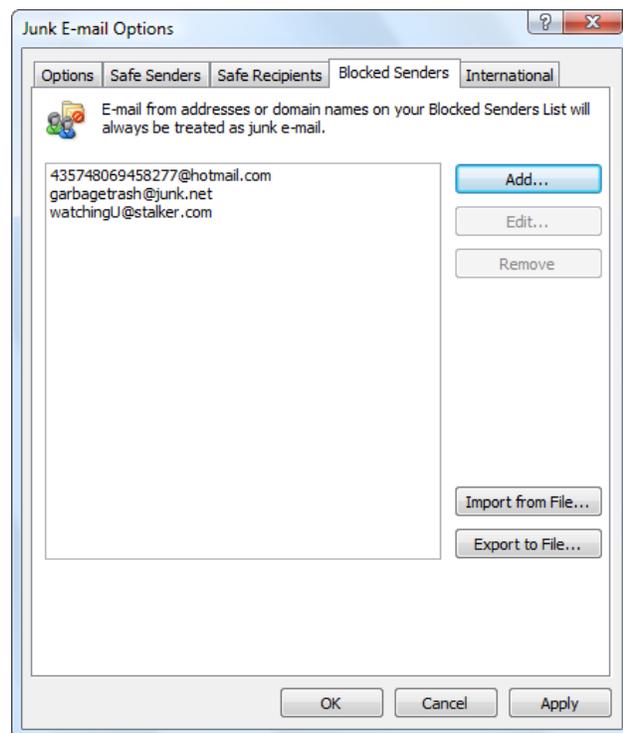


Figure 4-20: The Blocked Senders tab in the Junk E-mail Options dialog box.

Changing Outlook's Security Settings

Spam isn't just a nuisance, it can be dangerous to your computer if it carries a virus, or dangerous to you if the spammer acquires your personal information. You can use the Trust Center both to check for dangerous e-mail and to reassure your recipients that you are not trying to send dangerous e-mail to them.

1. In the program window, click the **File** tab and select **Options** from the menu.
2. Click the **Trust Center** tab. Click the **Trust Center Settings** button.

The Trust Center dialog box appears. The left column lists eight categories for setting options. See Table 4-6: Tabs in the Trust Center for more information on these categories.

3. Click **E-mail Security** in the left column.

The E-mail Security tab appears. There are four topics listed:

- **Encrypted Mail:** Encodes your message so that only the intended recipient can read it.
- **Digital IDs (Certificates):** Documentation that helps prove your identity when you send e-mail.
- **Read as Plain Text:** Disables HTML in incoming e-mail. Dangerous code won't be hidden in the message, but you'll be unable to view images.
- **Script in Folders:** If you share folders with other people, you may not want to allow script which could contain viruses or spyware in the folders.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Open the Trust Center and explore the tabs.

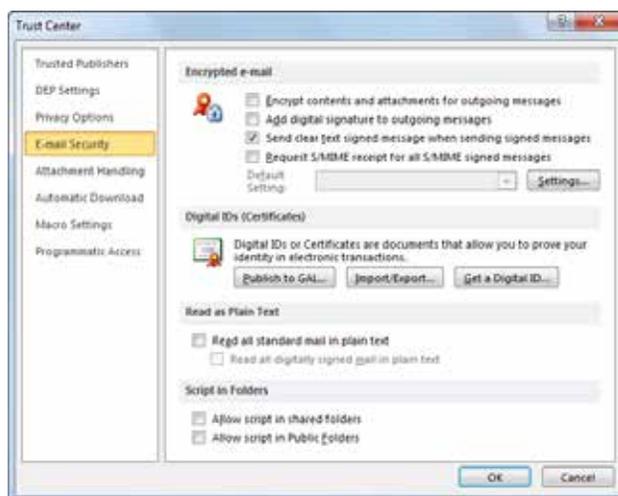


Figure 4-21: The E-mail Security tab of the Trust Center.

Table 4-6: Tabs in the Trust Center

Trusted Publishers	Bar individuals from publishing information from your computer unless they are given permission to do so.
DEP Settings	Turn Data Execution Prevention (DEP) mode on or off.
Privacy Options	Determine which ways Microsoft is allowed to use the Internet to help solve problems with your computer.
E-mail Security	Set security levels for encrypted e-mail, using digital IDs, reading e-mail as plain text, and allowing script.
Attachment Handling	Set the level of security for viewing attachments or opening messages that include attachments.
Automatic Download	Control whether Outlook automatically downloads and displays pictures when you open a message in HTML format.
Macro Settings	Receive a warning when a macro that you did not create is run or disable them completely
Programmatic Access	Receive a warning about suspicious activity when someone tries to access your e-mail address information or send messages on your behalf.

Inserting Screenshots

A screenshot is an image of something on your monitor.

Insert a screenshot of an open window

1. Create a new message.
2. Click the **Insert** tab on the Ribbon and click the **Screenshot** button list arrow in the Illustrations group.
A gallery of all open program windows appears.
 - ✔ **Tip:** If the program window is minimized to the taskbar, it will not appear in the gallery.
3. Click an image.
The screenshot is inserted into the message window.

Insert a screen clipping

Rather than insert an entire window, use the Screen Clipping tool to take a screenshot of part of the window.

1. Make active the window from which you want to take a screen clipping.
 - ✔ **Tip:** Minimize all program windows to the taskbar except for Outlook and the one from which you want to take a screen clipping.
2. Create a new message.
3. In the Message window, click the **Insert** tab on the Ribbon and click the **Screenshot** button list arrow in the Images group.
A gallery of all open program windows appears.
4. Select **Screen Clipping**.
The Outlook window minimizes to the taskbar, the desktop fades, and the cursor changes to a crosshair.
 - ✔ **Tip:** To cancel a screen clipping, press the **<Esc>** key while screen clipping mode is active.
5. Move the cursor to the corner of the area you want to clip.
6. Click and drag the cursor around the area you want to clip.
As you drag around the area, note that the area to be captured is not grayed out. When you release the mouse, the screen clipping is inserted into the message.

& Exercise

- **Exercise File:** Open a new message window
- **Exercise:** Take a screen clipping of the desktop and insert it in a message.



Figure 4-22: The Screenshot gallery is populated with thumbnails of all open program windows.

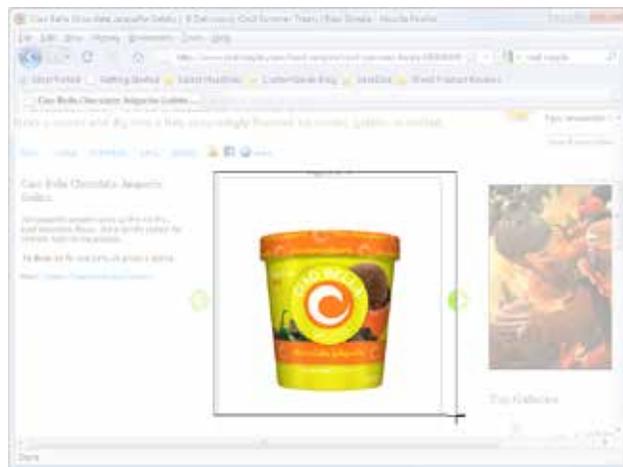


Figure 4-23: A screen clipping in progress.

More E-mail Features Review

Quiz Questions

35. Where are unfinished messages stored?
 - A. The Drafts folder.
 - B. The Sent Items folder.
 - C. The Saved Items folder.
 - D. The Unfinished Items folder.
36. You cannot recall a message if it has already been read or opened. (True or False?)
37. When resending a message, you can change or add recipients and change the body of the message. (True or False?)
38. The Out of Office Assistant temporarily disables your e-mail account. (True or False?)
39. If you want to delay a single message for two days, you should:
 - A. Use the Rules Wizard to create a rule that would only work on one message.
 - B. Click the Delay Delivery button on the Options tab of the message window.
 - C. Change the internal calendar on your computer by two days.
 - D. Click the Delay by two days hyperlink in the subject line of your e-mail.
40. You cannot customize a default quick step. (True or False?)
41. How do you access Outlook's Signature settings?
 - A. Open the Options dialog box and click Signatures on the Mail Format tab.
 - B. Open the Options dialog box and click Signatures on the Mail Setup tab.
 - C. Open the Format Signature dialog box and click the Signatures button.
 - D. Click the Signatures and Stationery button on the Standard toolbar.
42. You cannot use stationery and themes if your messages are formatted in Plain Text. (True or False?)
43. HTML format is compatible with *all* e-mail programs. (True or False?)
44. Which of these tasks can NOT be accomplished from the Junk E-mail Options dialog box?
 - A. Send a postmark with your outgoing e-mail.
 - B. Send junk e-mail back to the sender.
 - C. Receive a warning about suspicious domain names in e-mail addresses.
 - D. Permanently delete suspected junk e-mail immediately.
45. Setting the Junk E-mail filter to High may move regular mail to the Junk E-mail filter. (True or False?)
46. E-mail messages from the addresses in the Safe Senders list:
 - A. Will never go to the Junk E-mail folder.

- B. Will always go to the Junk E-mail folder.
 - C. Will occasionally go to the Junk E-mail folder depending on the subject.
 - D. Will be automatically flagged.
47. You can automatically add the addresses of every person you send e-mail to to the Safe Senders list. (True or False?)
48. Which of the following is NOT an option in the E-mail Security tab of the Trust Center?
- A. Use a Digital ID to prove that mail is being sent by you.
 - B. Block HTML and read standard mail as plain text.
 - C. Send encrypted mail
 - D. Save secure copies of all messages in your Inbox.
49. Viruses and spyware can be hidden in messages that use HTML code. (True or False?)
50. To insert a screenshot of a window, you must ensure that the window is NOT minimized to the Windows taskbar. (True or False?)

Quiz Answers

35. A. Unfinished messages are stored in the Drafts folder.
36. True. If the recipient has read or opened the message, it cannot be recalled.
37. True. Resending a message lets you open the message that was sent so you can change recipients or body text before resending.
38. False. The Out of Office Assistant does not disable your e-mail account in any way.
39. B. If you want to delay a single message for two days, you should click the Delay Delivery button on the Options tab of the message window.
40. False. You can customize a default quick step.
41. A. To access Outlook's Signature settings, open the Options dialog box and click Signatures on the Mail Format tab.
42. True. You can only use stationery and themes if your messages are formatted in HTML.
43. False. The only message format that is compatible with all e-mail programs is Plain Text.
44. B. You cannot send junk e-mail back to the sender using the Junk E-mail Options dialog box.
45. True. Although most junk e-mail is caught when the Junk E-mail filter is set to high, regular e-mail may be caught as well.
46. A. E-mail messages from the addresses in the Safe Senders list will never go to the Junk E-mail folder.

47. True. You can automatically add the addresses of everyone you send an e-mail message to by clicking the check box that says
48. D. The E-mail Security tab of the Trust Center lets you encrypt e-mail, use Digital IDs, read mail as plain text, and limit the use of script in folders.
49. True. Viruses and spyware can be hidden in messages that use HTML code.
50. True. To insert a screenshot of another window, the window must NOT be minimized to the Windows taskbar.

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As you may recall, people used to keep track of their contacts in a Rolodex, which was basically a small box filled with note cards. Contact information was typed or scribbled on each card, and the cards were arranged alphabetically by the contact's name. You would then spin a knob on the side of the box to rotate the cards to find a person. A Rolodex seems like a primitive way to manage contact information, but this was the best option until computers came along.

Outlook's Contacts list is a "technological Rolodex" database that keeps track of names, addresses, phone numbers, and lots of other information. Once you have entered a person's name and details into Outlook, the possibilities are endless. You can instantly find, e-mail or print contact information, or even create a map to a contact's business or home address.

Introduction to the Address Book

Unless you communicate with only two or three different people, it's almost impossible to memorize all of the phone numbers, addresses, and e-mails of everyone who you know. Fortunately, when you use Outlook's Address Book, you don't have to.

The Address Book can get its information from one or more sources, including Internet directory services and third party address books. Here are the two most common sources that the Address Book uses:

- **Global Address List:** If you use Outlook in a networked environment, the Global Address List contains your organization's users, groups, and contact groups. The Global Address List is similar to a large telephone directory that is available for everyone to use. A network administrator usually manages the Global Address List, so you can't make any changes to it.
- **Outlook Address Book:** The Outlook Address Book is similar to a personal address book.

There is a subcategory in the Outlook Address Book: the Contacts folder. Both personal contacts and contact groups are stored in the Contacts folder.

Open the Address Book

It doesn't matter if you're working with e-mail or the calendar—you can always find the Address Book.

1. Click the **Home** tab on the Ribbon and click the **Address Book** button in the Find group.

The Address Book appears. By default, names from your organization are displayed from the Global Address List.

2. Click the **Close** button.

The Address Book closes.

✓ Tips

- Most of the time, you will only want to add contacts and contact groups to your Contacts folder, so you won't need to use the Address Book very often.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Open the Address Book.
View the list of sources under the Address Book list arrow.
Close the Address Book.

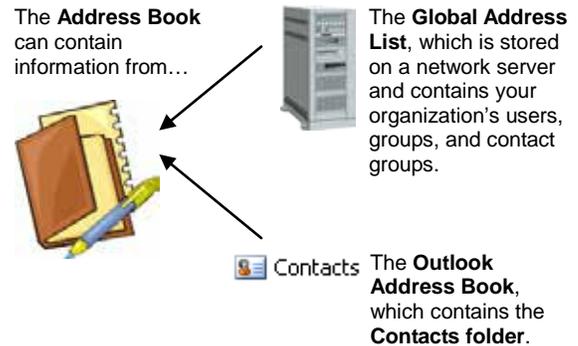


Figure 5-1: The Address Book can contain several types of information.

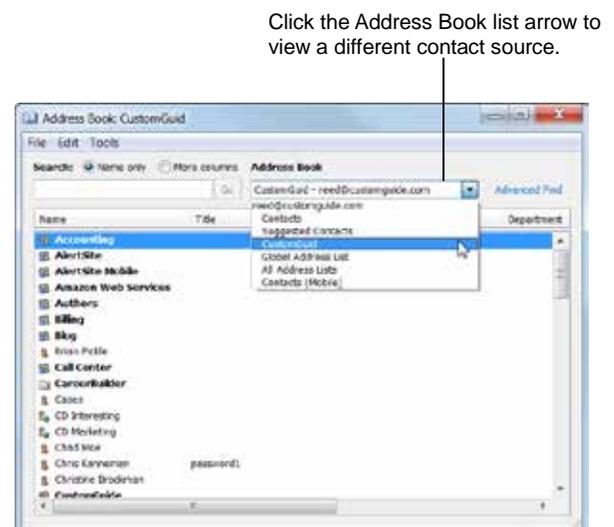


Figure 5-2: The Global Address List in the Address Book.

Adding a Contact

The Contacts list contains information about people and organizations with whom you interact. You can enter as much or as little information about your contacts as you want in the Contacts list, including names, phone numbers, e-mail accounts, and addresses.

You can use the Contacts list with other Outlook tools. For example, you can schedule an appointment with or send an e-mail to a contact. You can even use the Contacts list with other programs, such as software for an electronic organizer.

1. Click the **Contacts** button in the Navigation Pane.

By default, the Contacts list appears in Business Cards view. In this view, your contacts are displayed as Electronic Business Cards, which look like actual paper business cards on the screen.

2. Click the **Home** tab on the Ribbon and click the **New Contact** button in the New group.

The Untitled – Contact window appears. You can enter the contact’s name, company, job title, e-mail address, Web page address, phone numbers, and/or addresses.

Other Ways to Add a Contact:

Press **<Ctrl> + <N>**. Or, right-click the Contacts list and select **New Contact** from the contextual menu.

- Tip: If you create a contact with the same name as another contact, the Duplicate Contact Detected dialog box appears. Here, you can add a new record if the contact is a new contact or update the contact’s existing record.

3. Enter as much contact information as you want in the window.

- Tip: Several of the fields in the Contact window have buttons and list arrows next to them. The buttons display dialog boxes to assist you with the fields, while the arrows are used if a contact has multiple phone numbers, e-mail accounts, or addresses.

- Tip: To add a picture of a contact, click the **Add Contact Picture** button (located next to the Name and Company fields).

4. Click the **Contact** tab on the Ribbon and click the **Save & Close** button in the Actions group.

The Contact window closes and the new contact appears in the Contacts list.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Add Jeanne Trudeau to your Contacts list using the following information:

Name: Jeanne Trudeau;
Company: CustomGuide, Inc.
E-mail: jeanne@customguide.com
Business Phone Number: 888-903-2432
Business Address: 3387 Brownlow Ave., Saint Louis Park, MN 55426.

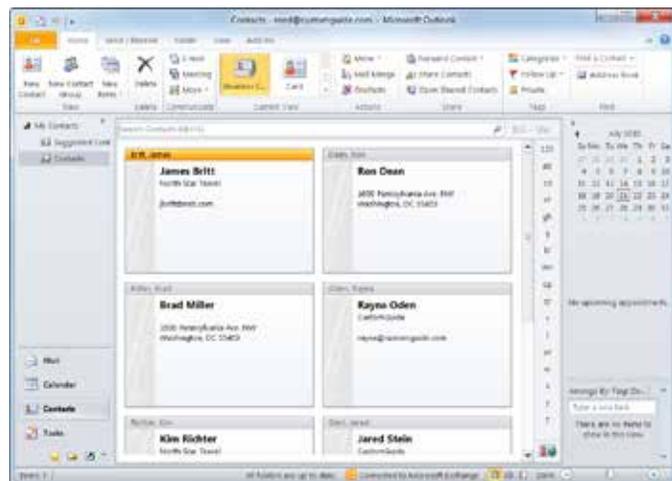


Figure 5-3: The Outlook Contacts list, displayed in Business Cards view.



Figure 5-4: A Contact window.

Adding a Contact from an E-mail

You can add someone to your Contacts list using an e-mail you've received. To add an e-mail sender's name and e-mail address to your Contacts list, simply drag the e-mail to the Contacts button in the Navigation Pane. Outlook will add the sender's name and e-mail address to the Contacts list—and you can add any additional information yourself.

1. Click the **Mail** button in the Navigation Pane.

The Inbox appears.

2. Click and drag the e-mail to the **Contacts** button in the Navigation Pane.

The Contact window opens, and the person's name and e-mail address are filled in automatically.

Other Ways to Add an E-mail Sender to the Contacts List:

Open an e-mail message (or just view it in the Preview pane), right-click the name in the From line, and select **Add to Outlook Contacts** from the contextual menu.

- ✔ **Tip:** If you create a contact with the same name as another contact, the Duplicate Contact Detected dialog box appears. You can add a new record if the contact is a new contact or update the contact's existing record.

3. Enter any additional information for the contact.
4. Click the **Contact** tab on the Ribbon and click the **Save & Close** button in the Actions group.

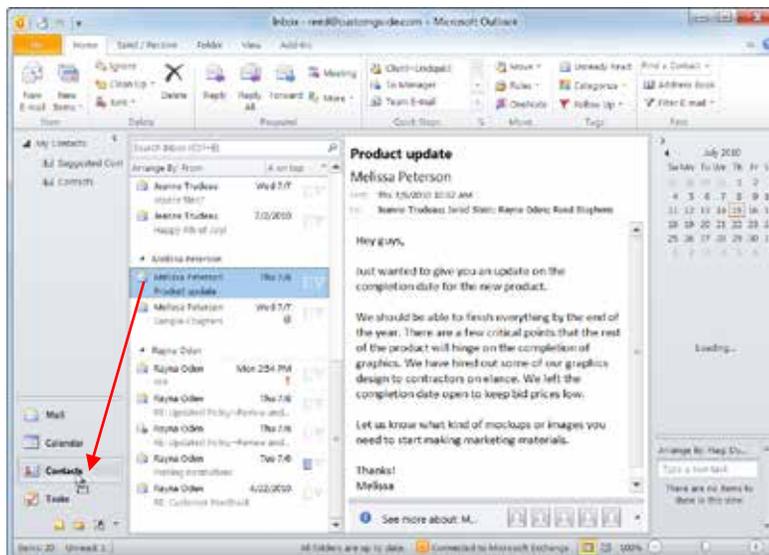
The Contact window closes, and the new contact appears in the Contacts list.

& Exercise

- **Exercise File:** A message from someone not saved in your Contacts list.
- **Exercise:** Add the sender's e-mail address to the Contacts list.

If you have any additional information about the contact, such as phone numbers or addresses, enter those items in the Contact window as well.

Figure 5-5: Click and drag a message to add the sender's e-mail address to your Contacts folder.



Editing and Deleting Contacts

It's easy to view and change information about your contacts. You can edit contact information by double-clicking a contact to open it in the Contact window, or you can edit information about a contact directly in the Contacts list. The latter method is more efficient; simply select the entry you wish to edit and make your changes.

Edit a contact

1. Click the **Contacts** button in the Navigation Pane.

Outlook displays the Contacts list.

2. Double-click the contact you want to edit in the Contacts list.

That person's contact window appears.

3. Make the necessary changes.

4. Click the **Contact** tab on the Ribbon and click the **Save and Close** button in the Actions group.

The window closes and the changes to the contact's information are saved.

Other Ways to Edit a Contact:

If you are using a view other than Business Cards, or have the Reading Pane displayed, modify the information right there without opening the Contact window.

-  **Tip:** You can also attach files or other Outlook items to contact records. Open a contact's window, click the **Insert** tab on the Ribbon, and click the **Attach File** or **Outlook Item** button in the Include group.

Delete a contact

You can also delete contacts if you no longer need them.

1. Double-click the contact you want to delete in the Contacts list.

That person's contact window appears.

2. Click the **Contact** tab on the Ribbon and click the **Delete** button in the Delete group.

The contact is moved to the Deleted Items folder in your Mailbox.

Other Ways to Delete a Contact:

Select the contact, click the **Home** tab on the Ribbon, and click the **Delete** button in the Delete group. Or, press the **<Delete>** key.

& Exercise

- **Exercise File:** A contact with this information:
Name: Brad Miller
Address: 1600 Pennsylvania Avenue NW, Washington, DC 55403.

Another contact with this information:

Name: Ron Dean

- **Exercise:** Edit the Brad Miller contact to change the zip code to 20500.

Delete the Ron Dean contact.

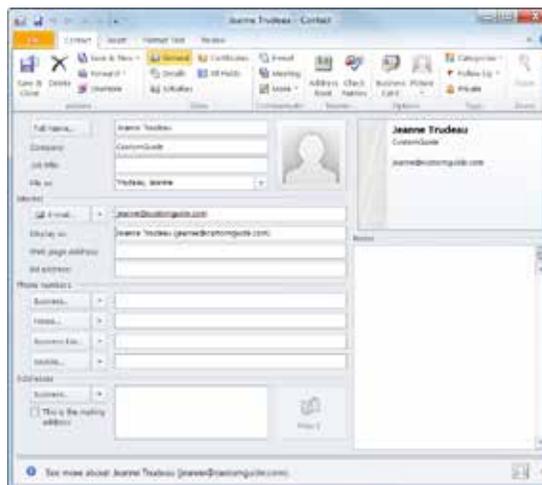


Figure 5-6: Edit a Contact in the Contact's window.

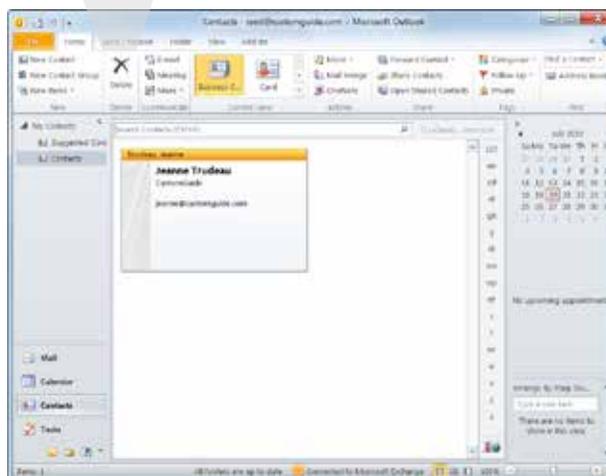
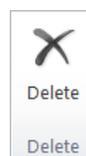


Figure 5-7: The Delete button on the Home tab of the Ribbon.

Viewing and Sorting Contacts

Outlook is flexible enough to keep all of your contacts in one place, yet display them differently depending on the type of work you're doing.

Like other folders in Outlook, the Contacts list has several different ways to look at the same information. These different views are very useful when it comes to organizing the Contacts list.

Change Contacts list view

By default, contacts appear in Outlook in Business Cards view. In this view, your contacts are displayed as electronic business cards, which look like actual paper business cards on the screen.

Changing the Contacts view changes how much information is displayed about your contacts in the Contacts list. You can display more detailed information about each contact, such as with the Business Cards or Cards view. Or, you can display more contacts on the screen at once, such as with the Phone or List view.

1. Click the **Contacts** button in the Navigation Pane. Outlook displays the Contacts list.
2. Click the **Home** tab on the Ribbon. See Table 5-1: Contacts List Views for a description of each view.
3. Select the view you want to use from the Current View group. The new view is applied.

- ◆ **Other Ways to Change Contact Views:** Display the Contacts list and click the **View** tab on the Ribbon. Click the **Change View** button in the Current View group and select the view you want to use from the list.

Sort contacts

If you are working in Phone or List view, you can further sort your contacts by categories, company, or location.

1. Click the **Contacts** button in the Navigation Pane. Outlook displays the Contacts list.

& Exercise

- **Exercise File:** None required.
- **Exercise:** View your contacts in each of the different views, then return to Business Cards view.

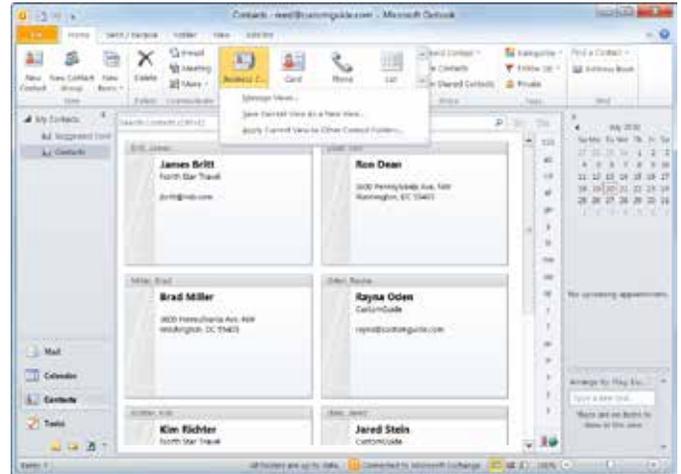


Figure 5-8: All views appear in the Current View group on the Home tab of the Ribbon.

Table 5-1: Contacts List Views

Business Card	Displays contacts as electronic business cards. This is the default view for the Contacts list.
Card	This is the most detailed view of the Contacts list. Everything is displayed on individual cards: business and home addresses, phone numbers, and other information.
Phone	Displays contacts in a list with company name, business phone number, business fax number, and home phone number. Phone view displays more contacts on the screen at a time but has less detailed information.
List	Displays your contacts in a table and sorts them alphabetically.

Working with Contacts

2. Click the **View** tab on the Ribbon.

There are three options for sorting your contacts:

- **Categories:** Organizes and sorts contacts by color category (if categories have been assigned to contacts).
- **Company:** Organizes and sorts contacts by company (if a company has been assigned to contacts).
- **Location:** Organizes and sorts contacts by location (if a location has been assigned to contacts).

3. Select an arrangement from the Arrangement group.

The arrangement is applied.

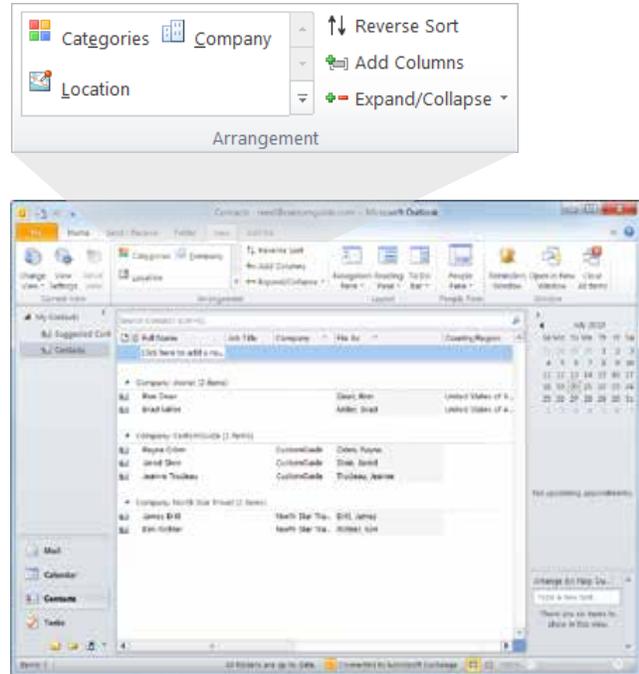


Figure 5-9: Sort contacts using the Arrangement group on the View tab of the Ribbon.

Mapping a Contact's Address

Are you good at finding addresses that you have never visited before? No? Don't worry—if you're connected to the Internet, Outlook can pinpoint the U.S. or Canadian address of any contact on a detailed map.

1. Click the **Contacts** button in the Navigation Pane.

The Contacts list appears. Now you need to select the contact whose address you want to map.

2. Double-click the contact you want to map.

The contact's window opens.

3. Click the **Map It** button under the Addresses heading.

Outlook launches a Web browser, navigates to the Bing Web site, and displays an interactive map of the contact's location.

- 🔴 **Other Ways Map a Contact's Address:** Click the **Contact** tab on the Ribbon, click the **More** button in the Communicate group, and select **Map It** from the list.

🟢 Tips

- 🗑️ Click the **Contact** tab on the Ribbon, click the **More** button in the Communicate group, and select **Web Page** to launch the contact's Web site.

& Exercise

- **Exercise File:** A contact with this information:
Name: Brad Miller
Address: 1600 Pennsylvania Avenue NW, Washington, DC 55403.
- **Exercise:** Map Brad Miller's address using Outlook's mapping feature.



Figure 5-10: Click the Map It button in the Contact window to map an address.

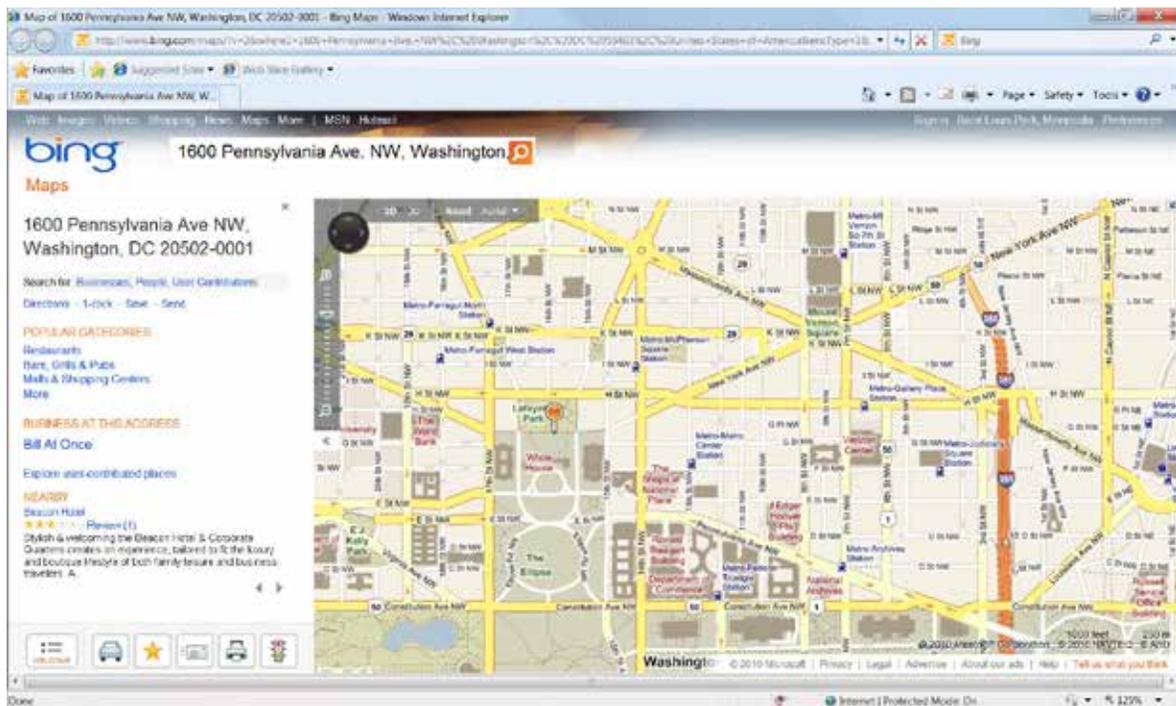


Figure 5-11: A map of a contact's address.

Working in a Contact Window

When you open a contact, you have access to useful tools for viewing and entering information, and for communicating with the contact.

Show different pages

The Show group on the Contact tab allows you to display different pages of information related to the contact. You can enter detailed contact information on each page and track activities and communications related to the contact.

1. Click the **Contacts** button in the Navigation Pane.

The Contacts list appears. Now you need to select the contact with which you want to work.

2. Double-click a contact.

The contact's window opens.

By default, the General page appears in the window, but you can display different pages of information. See Table 5-2: Contact Pages for an overview of all the pages.

3. Click a button in the **Show** group on the Ribbon.

The selected page appears in the window.

4. View or modify the information as desired.

Communicate with a contact

The Communicate group on the Contact tab allows you to communicate directly with a contact by e-mail or phone, or to schedule a meeting or task.

1. Click the **Contacts** button in the Navigation Pane.

The Contacts list appears. Now you need to select a contact.

2. Double-click a contact.

The contact's window opens. You can communicate with a contact directly from this window by using one of the following buttons:

- **E-mail:** Send an e-mail to the contact.
- **Meeting:** Send a meeting request to the contact.
- **Reply with IM:** Send an instant message to the contact using Windows Messenger (if you have Windows Messenger installed on your computer).
- **Call:** Make a phone call (if your modem is connected to a phone line).

& Exercise

- **Exercise File:** Jeanne Trudeau contact:
Name: Jeanne Trudeau;
Company: CustomGuide, Inc.
E-mail: jeanne@customguide.com
Business Phone Number: 888-903-2432
Business Address: 3387 Brownlow Ave., Saint Louis Park, MN 55426.
- **Exercise:** Open the Jeanne Trudeau contact and explore each of the pages you can show for the contact.

Send an e-mail to Jeanne Trudeau from the contact window.

Table 5-2: Contact Pages

General	Shows primary contact information: the contact's name, phone number(s), address, and e-mail.
Details	Shows secondary contact information: the contact's spouse, manager, birthday, etc.
Activities	Tracks all your activities with the contact, such as calls and e-mails.
Certificates	Stores digital IDs for the contact so that you can send him or her encrypted e-mail.
All Fields	Here you can edit all information contained in the contact and create your own custom fields for the contact.

Working with Contacts

- **Web page:** View the contact's Web page.
 - **Assign Task:** Assign a task to the contact.
 - **Journal Entry:** Create a journal entry about the contact.
 - **Map It:** View a map of the contact's location.
3. Click a button in the **Communicate** group on the Ribbon, and if necessary, select the option you would like to use.

A window opens to help you execute the selected form of communication. For example, if you clicked the E-mail button, a new message window appears, addressed to the contact.

4. Modify and send the communication.

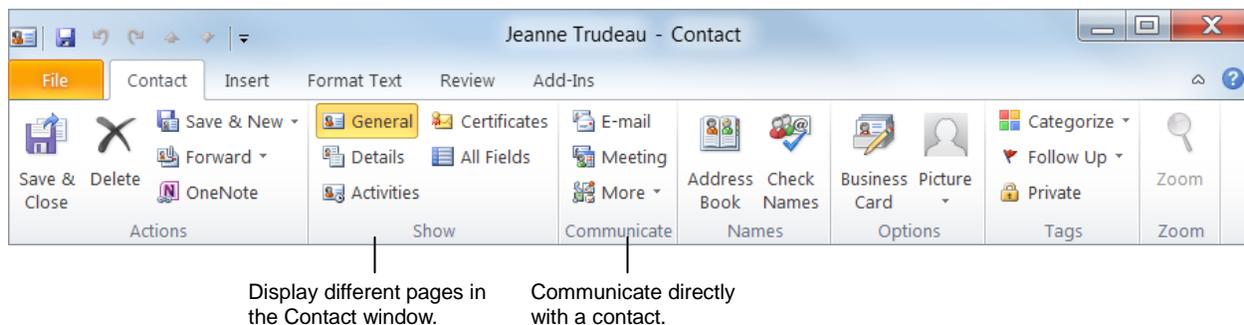


Figure 5-12: Groups in the Contact tab on the Ribbon.

Finding and Organizing Contacts

Once you start to accumulate a large number of contacts, you can use Outlook's search features to find contact information. You also can use folders to organize your contacts.

Find contacts

There are several ways to search for information in your contacts.

1. Click the **Contacts** button in the Navigation Pane.

The Contacts list appears. To find a contact or contact information, choose from the following search methods:

- **Search address books:** Click the **Home** tab on the Ribbon, enter a contact's name or company name in the Search address books box in the Find group, and press **<Enter>**.
- **Instant Search (Search Contacts):** Just as you can search e-mail messages using keywords, you can also search contacts. Enter search keywords (or even a phone number) in the Search Contacts box at the top of the Contacts list.
- **Alphabetical index:** If you are viewing your contacts in Business Cards or Cards view, click a letter button in the index that appears by the cards to display contacts beginning with that letter.
- **Sort table:** If you are viewing your contacts in a table view such as Phone view, click a column heading to sort the list by that column's criteria.

2. Select a search method and complete your search.

If you choose either the Search address books or Search Contacts method, the Search contextual tab appears on the Ribbon. Here you can further adjust your search using the following groups:

- **Scope:** Change which Outlook folders are searched.
- **Refine:** Search for items based on category, phone number, address, or information in other contact fields.
- **Options:** Review and reuse previous searches or change advanced search options.

& Exercise

- **Exercise File:** Jeanne Trudeau contact
- **Exercise:** Search for "Jeanne" in the Search Contacts box. Add a folder named "Office" and move the Jeanne Trudeau contact into it.

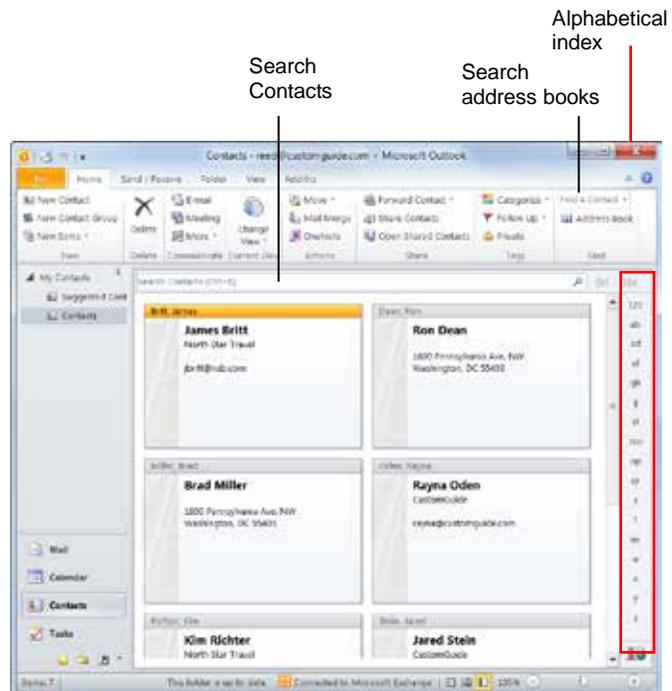


Figure 5-13: Finding Contacts in Business Cards view.

Click a column heading to sort the list by that column.

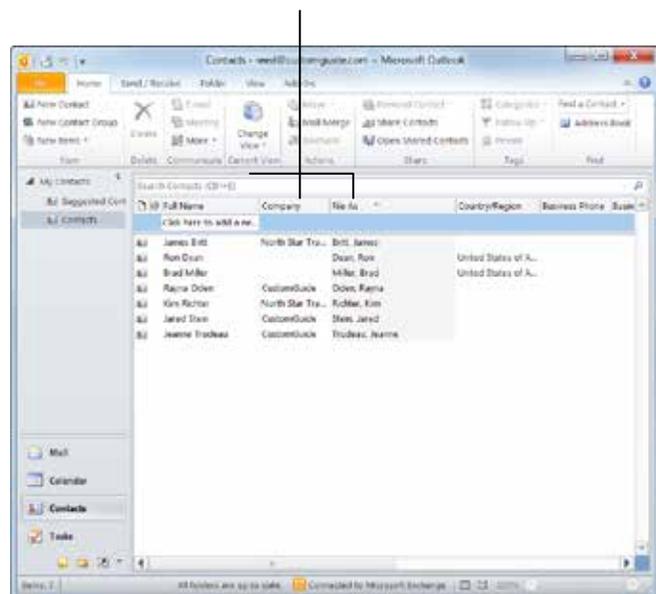


Figure 5-14: Finding Contacts in Phone view.

Add a contacts folder

You can organize your contacts by creating folders for specific categories of contacts.

1. Click the **Contacts** button in the Navigation Pane.
The Contacts list appears.
2. Click the **Folder** tab on the Ribbon and click the **New Folder** button in the New group.
The Create New Folder dialog box appears.
3. Enter a name for the new folder and make sure Contact Items is selected under the “Folder contains” list arrow.
4. Click **OK**.

The new folder appears in the Navigation Pane under My Contacts.

Now you can move contacts into the new folder.

5. Click and drag a contact from the Contacts list to the new folder’s icon in the Navigation Pane.

The contact is moved to the new folder.

✓ Tips

- ü You can also organize contacts by assigning them to color categories. Right-click a contact in the Contacts list, point to **Categorize**, and select a category.

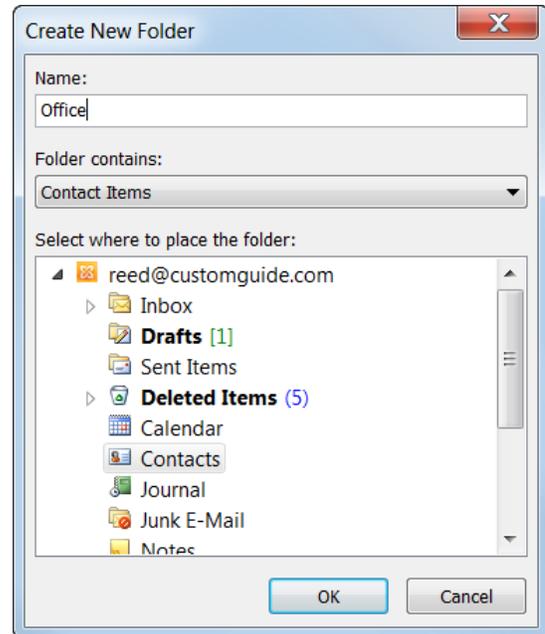


Figure 5-15: The Create New Folder dialog box.

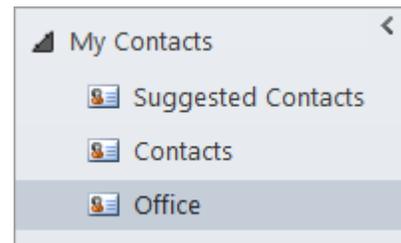


Figure 5-16: The new “Office” contacts folder appears in the Navigation Pane.

Creating a Contact Group

A contact group, known in previous versions of Outlook as a distribution list, lets you group e-mail addresses together. A contact group can save you time when you have to send e-mail to:

- All employees in the same department or organization
- Colleagues on the same project or committee
- A group of friends

Contact groups appear in your Contacts list the same way that a person's name does. To address an e-mail message using a contact group, follow the same steps that you would with any other message.

Before you can send e-mails to recipients in a contact group, you need to create the group.

1. Click the **Contacts** button in the Navigation Pane.
The Contacts list appears.
2. Click the **Home** tab on the Ribbon and click the **New Contact Group** button in the New group.
The Untitled – Contact Group window appears.
3. Enter a name for the contact group in the **Name** text box.
For example, you could name the contact group “Family” or “Management Team”.
Now you're ready to choose which recipients you want to include in the contact group.
4. Click the **Contact Group** tab on the Ribbon and click the **Add Members** button in the Members group.

There are three sources you can use to add recipients to a contact group:

- **From Outlook Contacts:** Use this option to add a recipient already in your Outlook Contacts list.
- **From Address Book:** Use this option to add a recipient from the Address Book, including any recipients in the Global Address List.
- **New E-mail Contact:** Use this option to add a recipient who has not been entered as an e-mail contact.

5. Select an option from the list.

Depending on the option you select, either the Select Members or Add New Member dialog box appears.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Create a contact group named “Friends” and add several contacts to the group.

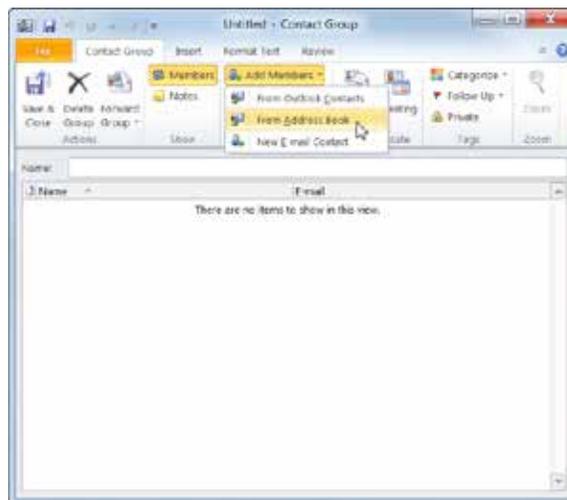


Figure 5-17: The Untitled – Contact Group window

Working with Contacts

6. Select or enter the recipients you wish to add.

As you add recipients, you return to the Contact Group window. The name you entered for the contact group now appears in the title bar, and the names of the recipients are listed in the window.

7. Click the **Save & Close** button in the Actions group on the Ribbon.

The window closes and the new contact group is saved.

Tips

- ü In addition to e-mail messages, you can use contact groups to create task requests, create meeting requests, and create other contact groups.

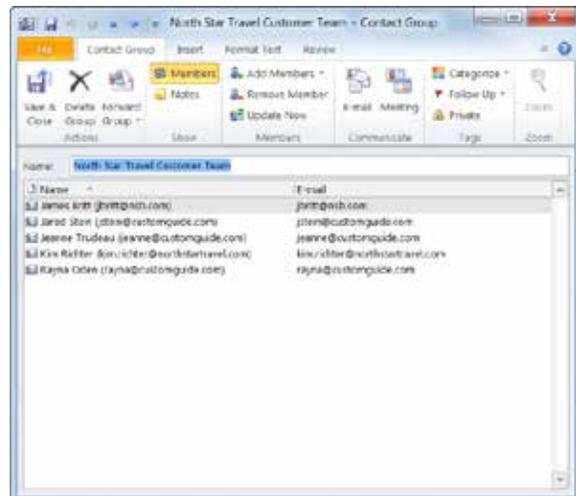


Figure 5-18: The Contact Group window displays a list of contact group members.

Printing the Contacts List

Even though we live in a digital world with paperless offices, some people like to print a copy of their Contacts list. Printing your Contacts list is no different from printing anything else in Outlook, except for a few unique options. You can customize the Contacts list print settings so that your printed list looks exactly how you want it to.

1. Click the **Contacts** button in the Navigation Pane.

The Contacts list appears.

2. Click the **File** tab and select **Print**.

Backstage View appears. Notice that the print settings and a preview of the document appear together, with print settings on the left and a preview on the right.

Here you can select a Print style. The styles that are available depend on the view that is displaying the contacts. See Table 5-3: Contact Print Styles for more information.

🔗 Other Ways to Print:

Press <Ctrl> + <P>.

3. Select a print style from the Settings list.
4. Specify other desired print options and click **Print**.

✔ Tips

- ü The Print dialog box gives you additional printing options. To open the Print dialog box, click the **Print Options** button.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Preview and print your contacts in Card Style.

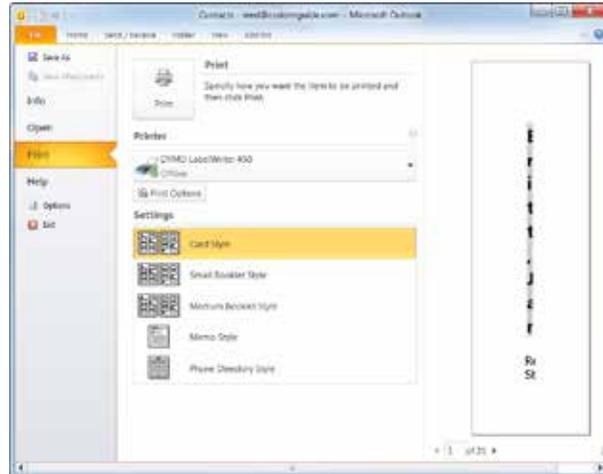


Figure 5-20: Backstage View allows you to preview Print styles.

Table 5-3: Contact Print Styles

Available in Business Cards and Cards views only		Card Style	Prints all cards one at a time from top to bottom on the page, two columns wide, and with alphabetical letter tabs and headings on a standard 8.5 x 11-inch piece of paper.
		Small Booklet Style	This is a printout arranged in a way that can be cut and stapled to form a small-sized paper booklet. When you print a booklet, the page layout and page numbering are arranged automatically. Contains contact name, phone number, and address information. Should be printed double-sided (you may receive a message that recommends you turn on your printer's double-sided printing option).
		Medium Booklet Style	This is a printout arranged in a way that can be cut and stapled to form a medium-sized paper booklet. Contains contact name, phone number, and address information.
		Memo Style	This is a printout with detailed information about only the currently selected contact.
		Phone Directory Style	This is a nicely condensed directory that shows only the contacts' names and phone numbers.
		Table Style	This is a no-nonsense format that lists the contacts in table rows and columns. This is the only view available when the Contacts list is displayed in Phone or List views.

Working with Contacts Review

Quiz Questions

51. The Global Address List is like your personal address book. You can add contacts as necessary. (True or False?)
52. When you add an entry to the Contacts list, you are required to include at least the following: First Name, Last Name, Address, City, and State. (True or False?)
53. To add a contact from an e-mail, click and drag the e-mail message to the _____ button in the Navigation Pane.
- A. Create Contact
 - B. Contacts
 - C. New Contact
 - D. Contact List
54. To edit a contact, you must add the contact again with the updated information. (True or False?)
55. When you delete a contact, it is sent to _____.
- A. the Deleted Items folder in your Mailbox
 - B. your Windows desktop
 - C. the Recycle Bin
 - D. an online Outlook folder
56. Which of the following is NOT a Contacts list view.
- A. Business Cards
 - B. Cards
 - C. Phone
 - D. Message
57. You must be connected to the Internet to display a map of a contact's address. (True or False?)
58. Which of the following is NOT a page you can show in a contact window?
- A. Tasks
 - B. General
 - C. Details
 - D. Activities
59. To send an e-mail or meeting request directly from a contact window, use a command in the _____ group.
- A. Contact
 - B. Show
 - C. Communicate
 - D. Options
60. Which of the following is NOT a way to search for a contact?
- A. Click the Find tab on the Ribbon

- B. Search address books
 - C. Use the Search Contacts box
 - D. Use the alphabetical index
61. You cannot add folders to organize your contacts. (True or False?)
62. You regularly send e-mails to your department. To make this quicker, you can create a _____?
- A. meeting request
 - B. contact group
 - C. contact
 - D. There is no way to make this quicker.
63. Which of the following is NOT a contact print style?
- A. Card
 - B. List
 - C. Small Booklet
 - D. Memo

Quiz Answers

51. False. The Global Address List is similar to a large telephone directory that is available for everyone to use. A network administrator usually manages the Global Address List, so you can't make any changes to it.
52. False. You can include as much or as little information as you want in a contact.
53. B. To add a contact from an e-mail, click and drag the e-mail message to the Contacts button in the Navigation Pane.
54. False. You can easily edit existing contact information - you don't need to add the contact again.
55. A. When you delete a contact, it is sent to the Deleted Items folder in your Mailbox.
56. D. Message is not one of the views available for the Contacts list. view.
57. True. You must be connected to the Internet to display a map of a contact's address.
58. A. Tasks is not a page you can show in a contact window.
59. C. To send an e-mail or meeting request directly from a contact window, use a command in the Communicate group.
60. A. There is no Find tab on the Ribbon.
61. False. You can add folders to organize your contacts.
62. B. You can create a contact group to group multiple e-mail addresses in one entry.
63. B. List is not a contact print style.

Using the Calendar

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Coming in at a close second to e-mail, the Calendar is one of the most-used tools in Microsoft Outlook. The Calendar lets you keep track of appointments, such as a visit to the dentist; and events, such as a vacation. It's easy to add or reschedule an appointment or event in the Calendar. Once you've entered your schedule into the Calendar, you can display it in a variety of different views.

In this chapter, you'll learn how to create and reschedule appointments and events, how to add a reminder to your appointments so that you don't forget about them, and how to view your schedule using the various Calendar views. You will also learn how to create a recurring appointment, such as a weekly staff meeting.

Using Exercise Files

This chapter suggests exercises to practice the topic of each lesson. There are two ways you may follow along with the exercise files:

- Open the exercise file for a lesson, perform the lesson exercise, and close the exercise file.
- Open the exercise file for a lesson, perform the lesson exercise, and keep the file open to perform the remaining lesson exercises for the chapter.

The exercises are written so that you may "build upon them", meaning the exercises in a chapter can be performed in succession from the first lesson to the last.

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Viewing the Calendar

Outlook's Calendar is a very useful tool. Use it to keep track of events and appointments in your schedule.

First, to display the Outlook Calendar:

1. Click the **Calendar** button in the Navigation Pane.
The Calendar appears.

Change the amount of time displayed

There are five ways to display the calendar:

- **Day:** Day view gives you an hour-by-hour breakdown of your daily schedule.
- **Work Week:** Work Week view displays your schedule Monday through Friday.
- **Week:** Week view displays the full seven-day week.
- **Month:** Month view is the default view in the Calendar. Month view shows your schedule for the entire month.
- **Schedule View:** Displays multiple calendars in vertical orientation so it's easy to compare schedules and appointments between calendars.

1. Click the button for the calendar arrangement you wish to use in the Arrange group on the Ribbon.
The calendar changes to the selected arrangement.

Other Ways to Change the Amount of Time Displayed:

Press the keystroke for the arrangement you want to see. Refer to Table 6-1: Arrangement Shortcuts for the keystroke shortcuts of each arrangement.

Change the level of detail in Month view

You can change the level of detail displayed in Month view.

1. Click the **Month** button list arrow in the Arrange group on the Ribbon and select the detail level you wish to use.

There are three levels from which to choose:

- **Show Low Detail:** Only holidays and events appear on a blank calendar.
- **Show Medium Detail:** Holidays and events appear. Color bars also appear in days on which you have calendar items.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Open the Calendar and display it in Day view. Switch to Month view.

View the next 7 days.

Minimize the Navigation Pane and the Tasks pane. Expand the Navigation Pane so it is visible again.

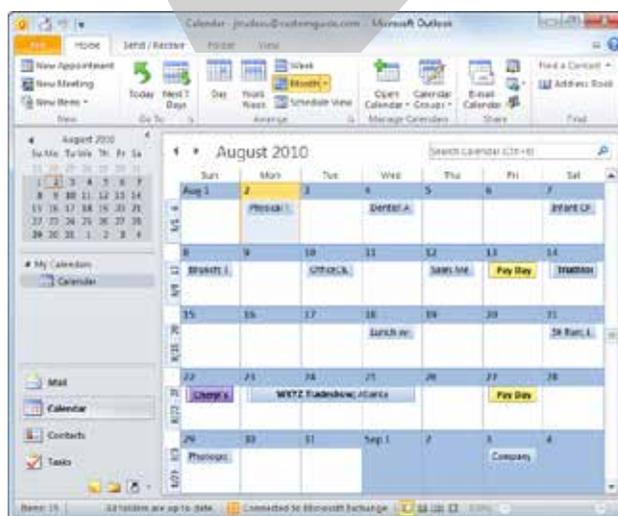
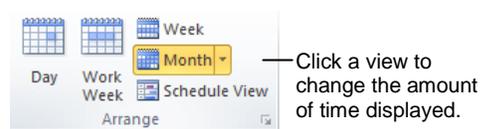


Figure 6-1: The Calendar displayed in Month view.

Table 6-1: Arrangement Shortcuts

Day	Ctrl + Alt + 1	Month	Ctrl + Alt + 4
Week	Ctrl + Alt + 2	Schedule	Ctrl + Alt + 5
Work Week	Ctrl + Alt + 3	0-9 day week	Alt + (0-9)

Using the Calendar

- **Show High Detail:** Time and header information for items appears, including category colors for calendar items.

View the next seven days

Want to see what's going on over the next seven days? Here's how to do it:

1. Click the **Home** tab on the Ribbon and click the **Next 7 Days** button in the Go To group.

The next seven days, starting with the current day, are displayed.

- ✔ **Tip:** The date navigator at the top of the Navigation Pane displays which days are currently displayed by adding gray shading to each date.

Increase the calendar area

You can increase the area in which the calendar is displayed by hiding the Navigation Pane and the Tasks pane.

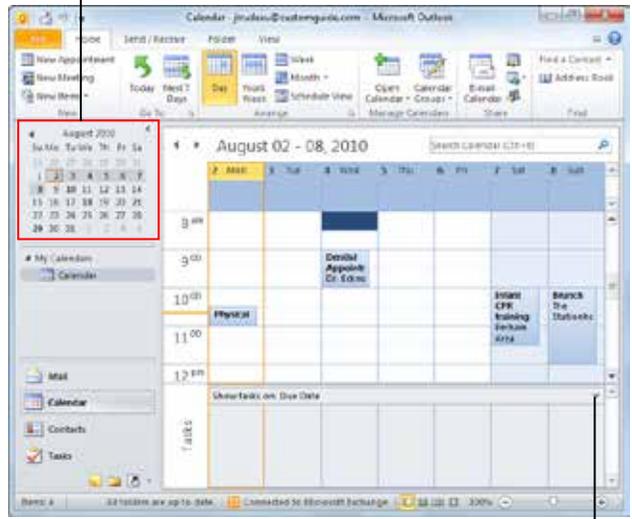
1. To hide the Navigation Pane, click the **Minimize the Navigation Pane** button.

The Navigation Pane is minimized. Click the button again to expand the Navigation Pane.

2. To hide the Tasks pane, click the **Minimize** button in the Tasks pane.

The Tasks pane is minimized. Click the button again to expand the Tasks pane.

The date navigator adds shading to the dates that are currently displayed.



Click to minimize the Task pane.

Figure 6-2: Close the Navigation Pane and Task pane to view more of the calendar.

Navigating the Calendar

There are many ways to navigate between items and dates in the calendar. This lesson covers some of the most common ways to do this.

Scroll to the next day, week, or month

As you view the calendar in different arrangements, you can navigate between days, weeks, or months, depending on how the calendar is arranged.

1. Click the **Back** or **Forward** buttons.

Outlook goes back or forward one day, week, or month, depending on the arrangement currently being viewed.

Move to the next or previous appointment

As you navigate between days and weeks in your calendar, you may find some stretches of time where there are no appointments. In these instances, you can jump between appointments and skip over empty dates.

1. Click the **Previous Appointment** or **Next Appointment** buttons.

Outlook jumps to the appointment.

✔ **Tip:** These buttons only appear if the current Calendar view does not contain any appointments.

Jump to a specific date

To see what is happening on a specific date, you can quickly jump to that date and see if anything is planned.

1. Click the **Home** tab on the Ribbon and click the **Dialog Box Launcher** in the **Go To** group.

The **Go To Date** dialog box appears.

2. Enter or select the date you want to jump to and select the view in which to display the date.

3. Click **OK**.

Jump to today

Wherever you are in the calendar, it's easy to jump back to today.

1. Click the **Today** button in the **Go To** group on the Ribbon.

The calendar jumps to today.

& Exercise

- **Exercise File:** None required.
- **Exercise:** In Monthly view, scroll ahead two months. Scroll back to the current month.

Use the **Go To Date** dialog box to jump to your birthday. Then jump back to today.

Search for an item in the calendar.

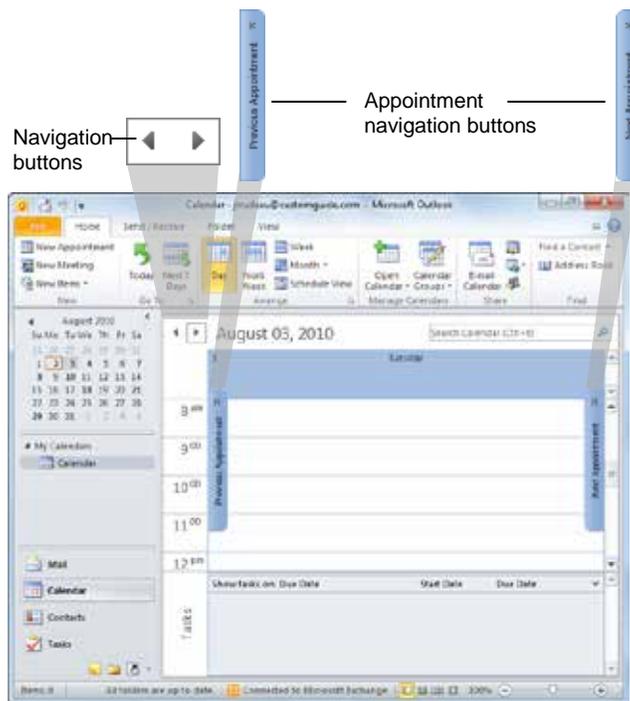
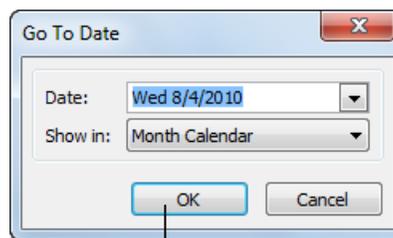


Figure 6-4: If the current Calendar view does not contain any appointments, one or both appointment navigation buttons appear on either side of the Calendar. Click these buttons to jump to the next or previous appointment. (These buttons appear smaller if the program screen is smaller.)



Select the view in which you want to display the selected date.

Figure 6-3: Go To Date dialog box.

Search for a calendar item

If you need to find a calendar item in the past or the future, searching is an easy way to find it.

1. Click the **Search Calendar** text box.

The calendar to be searched is highlighted in orange in the Navigation Pane.

Other Ways to Search the Calendar:

Press **<Ctrl> + <E >**.

2. Enter keywords for the item you want to find and press **<Enter>**.

The most relevant items matching the search are displayed.

Click to search for a calendar item.

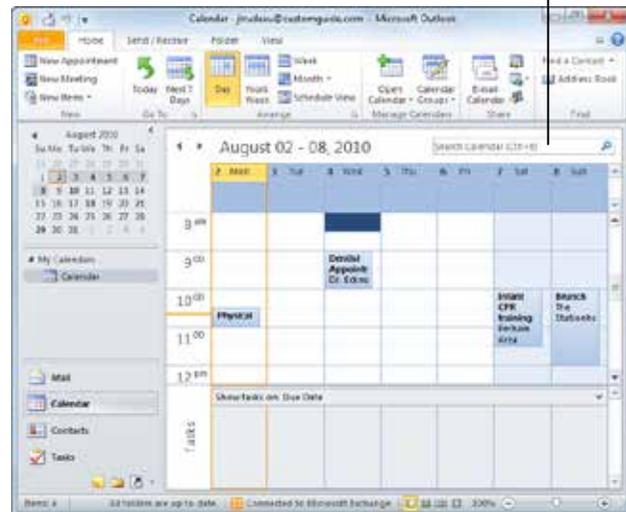


Figure 6-5: Use the Search box to find an item in the Calendar.

Scheduling Appointments

Outlook's Calendar is great for keeping track of your appointments.

Create an appointment

An *appointment* is any scheduled activity that takes place within a one-day time period. When you schedule an appointment, the Calendar blocks off the specified time span—for example, from 10 a.m. to noon.

1. Click the **Calendar** button in the Navigation Pane.
2. Click the **New Appointment** button on the Ribbon.
An Untitled—Appointment window appears.

Other Ways to Create a New Appointment:
Press **<Ctrl> + <N>**.

3. Type a description of the appointment in the **Subject** field (for example, **Lunch with Julie**).
4. (Optional) Enter the appointment's location in the **Location** field.
5. Specify the date of the appointment and its start and end time.

You can use the **Start** and **End time** list arrows to select a date and time, or you can enter the date and time manually.

6. Enter additional information about the appointment, as desired.

For example, you could include notes about the appointment in the body area of the appointment window.

7. Click the **Save & Close** button in the Actions group on the Ribbon.

The Appointment window closes and the appointment appears in your calendar.

Other Ways to Create an Appointment:
Press **<Ctrl> + <Shift> + <A>**. Or, click in the Calendar where you want to insert an appointment and type the appointment's description.

& Exercise

- **Exercise File:** None required.
- **Exercise:** If necessary, jump back to the current day.

Create a two-hour appointment for tomorrow called "Training," and schedule it so that it begins at 2 p.m. and lasts until 5 p.m.

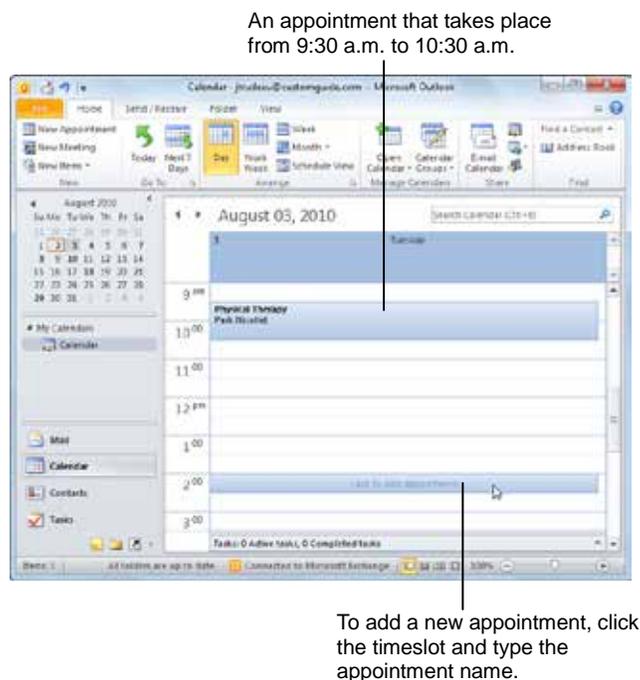


Figure 6-6: An appointment is any scheduled activity that takes place within a one-day time period.

Copy an appointment

There may be times that you have several appointments at the same place, but on different days and at different times. For example, perhaps your son has a football game at 5:00 PM on Tuesday and 4:30 PM on Friday. Instead of creating two or more individual appointments, save yourself some time by creating one appointment and then copying it to another day and/or time.

1. Select the appointment you want to copy.
2. Press and hold down the **<Ctrl>** key, and click and drag the appointment to another day and/or time.

The appointment is copied.

- 🔹 **Other Ways to Copy an Appointment:**
Select the appointment and press **<Ctrl> + <C>** to copy it. Click the destination of the appointment and press **<Ctrl> + <V>**.

Scheduling an Event

An *event* is any appointment that lasts a day or more, such as conferences or vacation. Events are not displayed as blocked-out time periods; they appear as banners. An all-day appointment displays your time as busy, but an event displays your time as free.

1. Click the **Calendar** button in the Navigation Pane.
2. Click the **New Items** button in the New group on the Ribbon and select **All Day Event** from the list.

An Untitled—Event window appears.

Other Ways to Create a New Event:
 Create a new appointment and click the **All day event** check box. Or, in Day/Week/Month view, double-click the darker shaded area beneath the date heading of the day of the event.

3. Type a description of the event in the **Subject** field (for example, **Tradeshaw in Atlanta**).
4. Enter the event's location in the **Location** field.
5. If the event lasts longer than one day, specify the values in the **Start time** and **End time** date navigators.

You can use the Start and End time list arrows to select a date, or you can enter the date manually.

6. To change the status of the event, click the **Show As** list arrow and select your status for the event.
7. Enter any additional information about the event.

For example, you could enter a note about the event in the message area of the window. You can also use the commands in the Options group to make specifications.

8. Click the **Save & Close** button in the Actions group.

The Appointment window closes and the event appears in your calendar.

Other Ways to Schedule an Event:
 Click the **All day event** check box in an appointment window. Or, in Month view, click the date on which you want to schedule the event, type the name of the event and press **<Enter>**. To schedule an event over multiple days, click and drag to select the days then type the name and press **<Enter>**.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Schedule an all-day event on your birthday named "My Birthday".

Click here to save the event. Click here to specify that this is an all-day event.

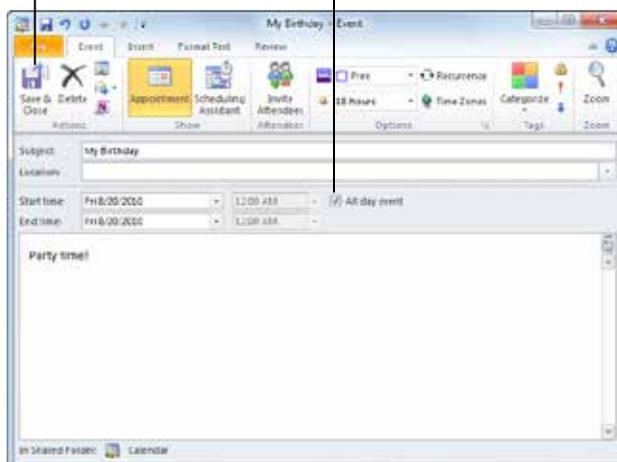


Figure 6-7: Creating a new event.

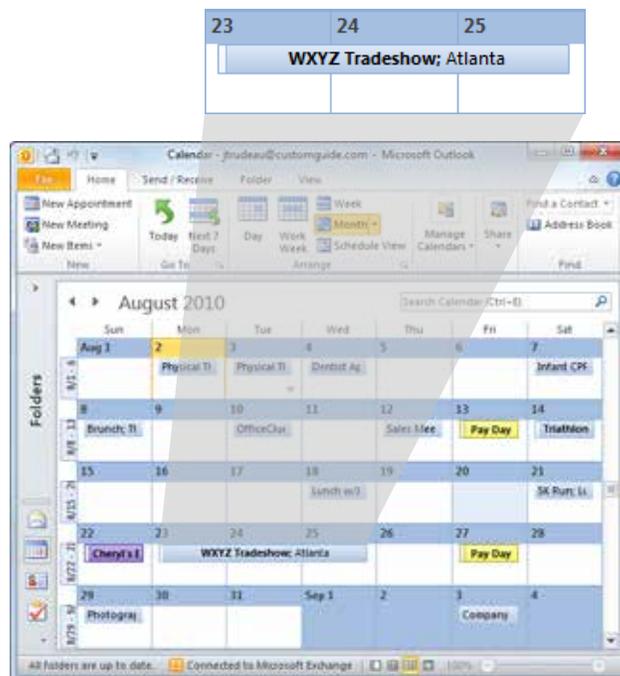


Figure 6-8: Events that take place over several days appear as banners in the Calendar.

Editing and Rescheduling Appointments and Events

Having to edit and reschedule appointments and events is an unavoidable task in today's busy world. Co-workers cancel at the last minute, meeting locations change, etc. This lesson shows you just how easy it is to edit or reschedule your appointments and events in Outlook.

Edit an appointment or event

To edit an appointment or event, open it in its own window.

1. Double-click the appointment or event you want to edit.
The appointment or event opens in its own window.
2. Edit the appointment or event as necessary.
3. Click the **Save & Close** button in the Actions group.
Outlook saves your changes.

Reschedule an appointment or event

Rescheduling an appointment or event is easy.

1. Click and drag the appointment or event to a new date and/or time.
You can click and drag in Day, Week, or Month view.
Other Ways to Reschedule an Appointment or Event:
Double-click the appointment or event you want to reschedule and specify a new date and/or time using the **Start time** and **End time** controls.

Delete an appointment or event

If an appointment or event has been canceled indefinitely, delete it.

1. In the Calendar, click the item you want to delete.
2. Press the **<Delete>** key.
The appointment or event is removed from the Calendar.
Other Ways to Delete an Appointment or Event:
Select the item and click the **Delete** button in the Actions group on the Ribbon. Or, right-click the appointment or event and select **Delete** from the contextual menu.

& Exercise

- **Exercise File:** If necessary, create a two-hour appointment that occurs tomorrow called "Training," and schedule it to begin at 2 p.m.
- **Exercise:** Reschedule this appointment so that it begins in two days instead of tomorrow.

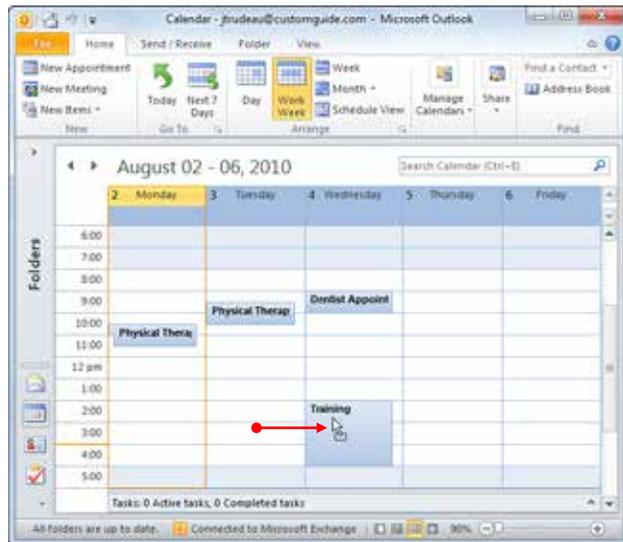


Figure 6-9: To reschedule an appointment, click and drag the appointment in the Calendar.

Working with Recurring Appointments

A *recurring* appointment is an appointment that occurs at regular intervals; for example, every Friday at 10 a.m.

Create a recurring appointment

1. Click the **New Appointment** button in the New group on the Ribbon.
An Untitled—Appointment window appears.
2. Type a description of the appointment in the **Subject** field (for example, *Staff Meeting*).
3. Click the **Recurrence** button in the Options group.
The Appointment Recurrence dialog box appears. Here you need to specify the time of the appointment, how often the appointment should recur (for example, every Friday), and the start and end date of the recurrence.
4. Make your specifications in the Appointment Recurrence dialog box and click **OK**.
5. Click the **Save & Close** button in the Actions group.

Edit a recurring appointment

1. Double-click the appointment you want to edit.
The Open Recurring Item dialog box appears. You have two options here:
 - **Open this occurrence:** Edits only the selected occurrence of the recurring appointment.
 - **Open the series:** Edits every occurrence of the recurring appointment.
 2. Select the appropriate option and click **OK**.
The appointment opens in its own window.
 3. Edit the appointment as necessary.
 4. Click the **Save & Close** button in the Actions group.
Outlook saves your changes.
-  **Other Ways to Edit a Recurring Appointment:** Right-click the appointment you want to edit and select **Edit Series** from the contextual menu.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Create a recurring appointment named “Marathon Training” that occurs every Monday from 5 a.m. to 7 a.m. and ends after 10 occurrences.

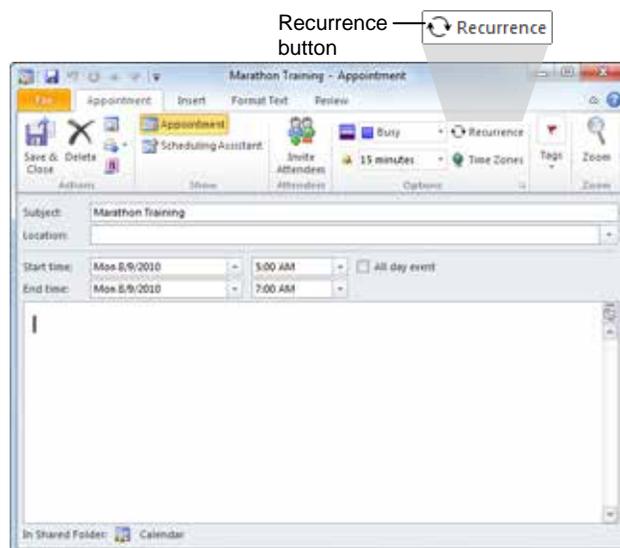


Figure 6-10: Scheduling a recurring appointment.

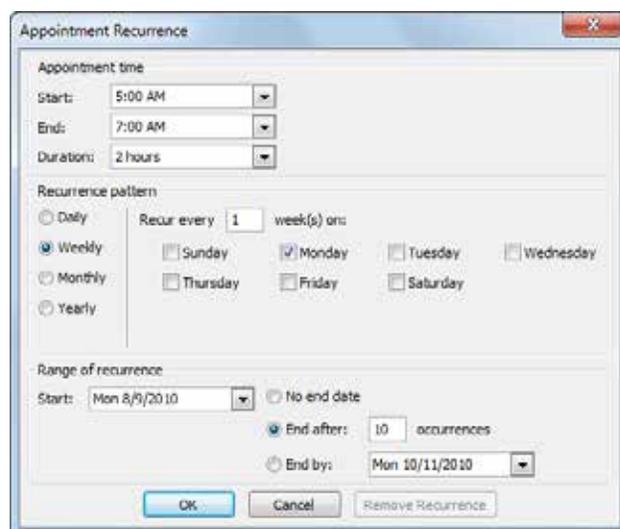


Figure 6-11: The Appointment Recurrence dialog box.

Delete a recurring appointment

1. In the Calendar, click the appointment that you want to delete.

2. Press the <Delete> key.

The Confirm Delete dialog box appears. You have two options here:

- **Delete this occurrence:** Deletes only the selected occurrence of the recurring appointment.
- **Delete the series:** Deletes every occurrence of the recurring appointment

3. Select the appropriate option and click **OK**.

Outlook removes the recurring appointment from your Calendar.

Other Ways to Delete a Recurring Appointment:

Select the item and click the **Delete** button in the Actions group on the Ribbon. Or, right-click the appointment you want to delete and select **Delete** from the contextual menu. Select the appropriate option and click **OK**.

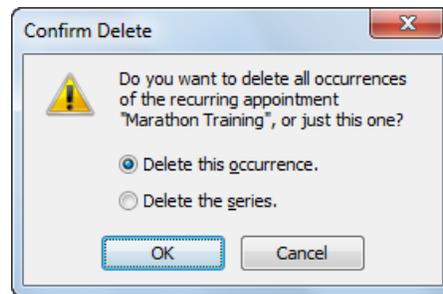


Figure 6-12: The Confirm Delete dialog box.

Setting Availability

Adding free/busy information to your appointments helps people know when you are available.

When you make an appointment, the schedule is automatically set to Busy. When you create an event, the availability is set to Free. You can change your status so that is correctly reflects your availability for those who can view your calendar.

1. Click the **Calendar** button in the Navigation Pane.

The calendar appears.

2. Create a new appointment or event, or open an appointment or event you have already created.

The appointment window appears.

3. Click the **Show As** list arrow in the Options group of the Appointment tab on the Ribbon.

You can select Busy, Tentative, Free, or Out of Office. See Table 6-2: Show Time As Options for a description of these options.

4. Select a status from the list.

The status of the appointment will be shown accordingly when your calendar is viewed.

5. Click the **Save & Close** button in the Actions group on the Ribbon.

The availability for the appointment or event is set.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Change the availability for an event to Out of Office.



Figure 6-13: Setting the availability for an event.

Table 6-2: Show Time As Options

Free	Designates that you are available for a meeting.
Tentative	Designates that you have a tentative meeting and may not be available.
Busy	Designates that you are busy and are not available for a meeting.
Out of Office	Designates that you are out of the office and are not available for a meeting.

Color-coding Appointments

Color categories let you organize your Outlook items by color, making it easier to distinguish between different types of information. In the Calendar, you can color-code your appointments, meetings, and events.

Assign a color category

By default, six color categories are available. You can apply one or more categories to an item at a time.

1. Select the appointment, meeting, or event you want to color-code.

The Appointment tab appears under Calendar Tools on the Ribbon.

2. Click the **Categorize** button in the Tags group of the Appointment tab on the Ribbon.

A list of color categories appears.

3. Select a color category from the list.

The selected color is applied to the appointment.

Other Ways to Color-code an Item:

Right-click the item you want to color-code, point to **Categorize** in the contextual menu, and select a color category from the list. Or, open the appointment and click the **Categorize** button in the Tags group of the Appointment tab on the Ribbon.

Rename a color category

You can rename Outlook's color categories to make them more meaningful.

1. Select an appointment, meeting, or event.

The Appointment tab appears under Calendar Tools on the Ribbon.

2. Click the **Categorize** button in the Tags group of the Appointment tab on the Ribbon.

3. Select **All Categories**.

The Color Categories dialog box appears.

4. Click the color category you wish to rename, and click the **Rename** button.

5. Type a new name for the category and click **OK** when you're finished.

& Exercise

- **Exercise File:** If necessary, create a recurring appointment named "Marathon Training" that occurs every Monday from 5 a.m. to 7 a.m. and ends after 10 occurrences.
- **Exercise:** Color-code the Marathon Training appointments using the Green Category color.

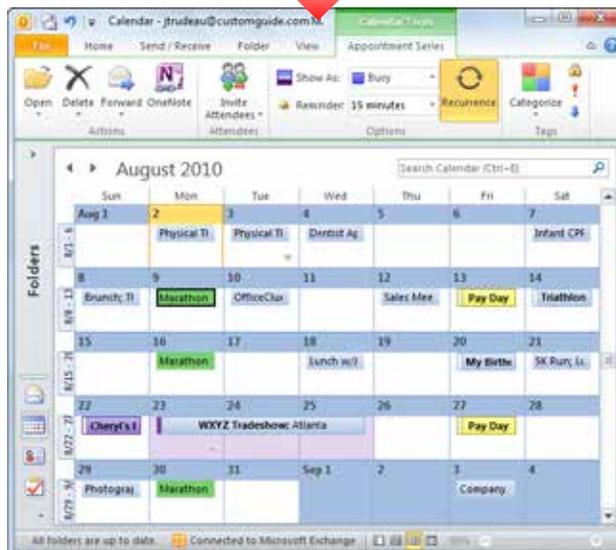


Figure 6-14: Color-coding an appointment.

✔ Tips

- ü The same categories are used throughout Outlook, so a renamed category in the Calendar appears the same way under Mail.

Create a new category

If find you need more categories, you can create your own from scratch.

1. Select an appointment, meeting, or event.

The Appointment tab appears under Calendar Tools on the Ribbon.

2. Click the **Categorize** button in the Tags group of the Appointment tab on the Ribbon.

3. Select **All Categories**.

The Color Categories dialog box appears.

4. Click **New**.

The Add New Category dialog box appears. Here you can give the category a name, assign a new color to the category, or create a keystroke shortcut for the category.

5. Type a new name for the category, specify any other options as necessary, and click **OK**.

The new category is added to the list of categories.

✔ Tips

- ü You can also control color categories from inside the Appointment window. To do so, click the **Categorize** button in the Tags group on the Ribbon and select a category from the menu.

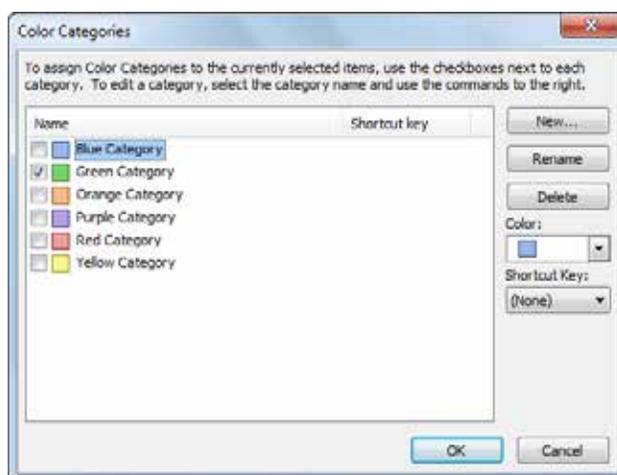


Figure 6-15: The Color Categories dialog box.

Setting Reminders

To make sure you don't forget about an important appointment or event, you can set reminders in Outlook. You can specify when you want the reminder to appear (for example, an hour before the scheduled appointment) and you can even select a sound to play during the reminder.

For existing appointments, meetings, or events

By default, a reminder will appear 15 minutes before a scheduled appointment or meeting, and 18 hours before an all-day event. However, you can change when a reminder appears.

1. In the Calendar, double-click the item for which you want to set a reminder.

If the item is already open, you can skip this step.

2. Click the **Reminder** list arrow in the Options group on the Ribbon.

A list of reminder options appears. You can schedule a reminder to appear as many as two weeks or as little as five minutes before the appointment, meeting, or event.

3. Select an option from the list.

Tip: If you don't want a reminder to appear for the item, select **None** from the list.

4. Click the **Save & Close** button in the Actions group on the Ribbon.

Change the default reminder settings

If you want to change the default Reminder settings for all new appointments and meetings, use the Options dialog box.

1. In the program window, click the **File** tab on the Ribbon and select **Options**.

The Outlook Options dialog box appears.

2. Click the **Calendar** tab.

3. In the Calendar options section, select or clear the **Default reminder** check box.

If the check box is checked, the default reminder is set for all new appointments. If it is cleared, no reminder appears for appointments.

& Exercise

- **Exercise File:** Create a new appointment called "Break" that occurs in 10 minutes and lasts for half an hour.
- **Exercise:** Click the Reminder list arrow on the Ribbon and select 5 minutes. Click Save & Close and wait for the Reminder to appear. When it does, dismiss the reminder.

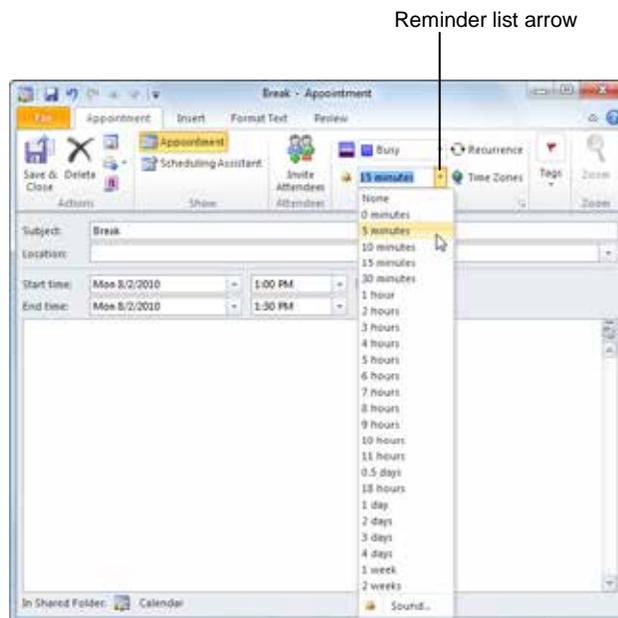
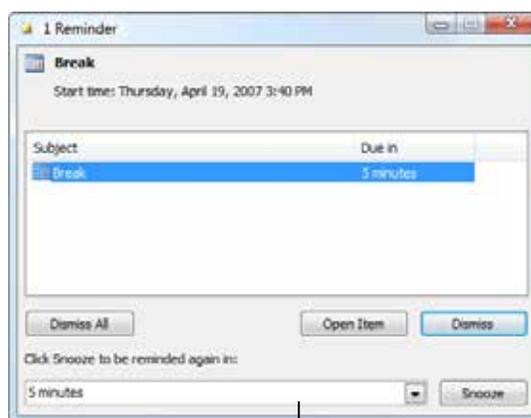


Figure 6-16: Setting a reminder time.



Click Snooze to be reminded of the appointment again before it begins

Figure 6-17: What a reminder looks like.

Using the Calendar

4. Click the **Default time** list arrow and select when you want the reminder to appear.

The time refers to the amount of time before the appointment. So by default, a reminder will appear 15 minutes before an appointment. If you need more time, say an hour, select 1 hour instead.

5. Click **OK**.

The Options dialog box closes. Now every new appointment or meeting will have the selected settings applied.

✓ Tips

- ü You cannot change the default Reminder settings for events.
- ü To change the sound that plays when a Reminder appears, click the **Reminder** list arrow and select **Sound** from the list. Click the **Browse** button, find and select the file you want to use, and click **Open**. Then, click **OK**.

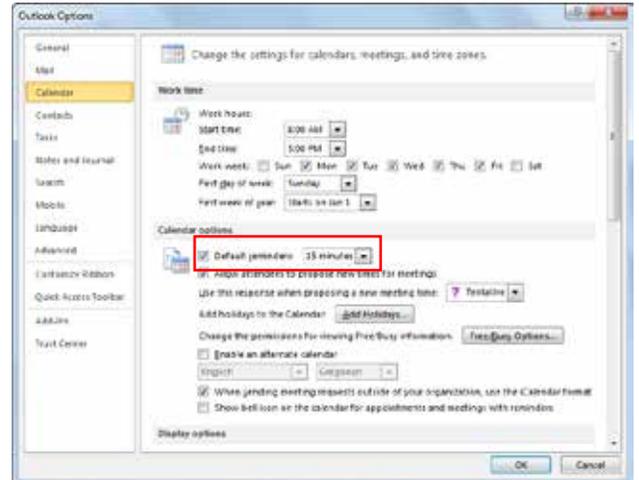


Figure 6-18: The Options dialog box. Click the Reminder list arrow to select a new reminder time.

Viewing Calendar Items

When your Calendar is jam-packed with appointments, meetings, and events, it can be difficult to separate the forest from the trees. Fortunately, Outlook lets you view your Calendar by item, such as active appointments or annual events.

1. Click the **View** tab on the Ribbon.
2. Click the **Change View** button in the Current View group on the Ribbon.

A list of views appears. Take a look at Table 6-3: Calendar Views for a description of each view.

3. Select a view from the list.
The Calendar changes to the selected view.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Switch to Active view.

Switch back to Calendar view.

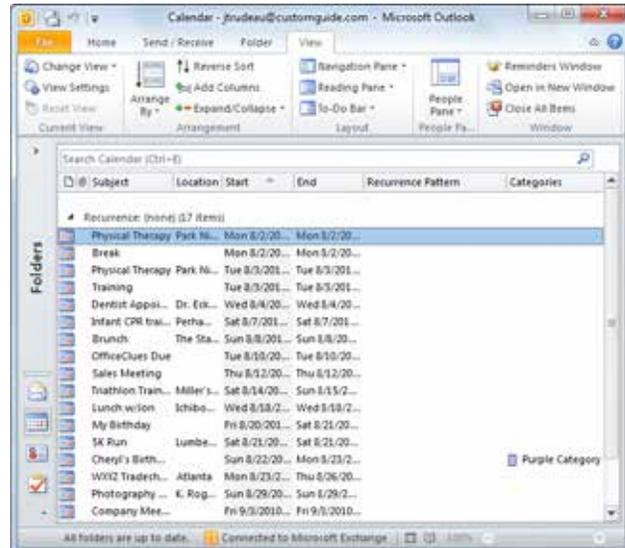


Figure 6-19: The Calendar displayed in Active view. Active view lists all of your current and future appointments.

Table 6-3: Calendar Views

Calendar	The default view. Each arrangement (Day/Week/Month) has its own button in the Calendar grid.
Preview	Same as above, except the first few lines of text for each item are included.
List	Displays all appointments you have set in the Calendar, both past and present. Click a column heading to change the how the calendar items are sorted.
Active	Lists all current and future appointments. Click a column heading to change the how the calendar items are sorted.

Changing the Appearance of a Calendar

Changing the appearance of a calendar can help you distinguish it from other calendars or let you view critical information in a way that is useful to your working style.

Change the time scale

By default, the calendar grid shows a time interval of 30 minutes. You can increase or decrease this interval to show more or less detail in the calendar. The time scale cannot be changed in Month view.

1. Click the **View** tab on the Ribbon and click the **Time Scale** button in the Arrangement group.

A list of interval options appears. The 5 minute interval shows the most detail, while the 60 minute interval shows the least detail.

2. Select the grid interval that you want to show in the calendar.

Change the background color

You can change the background color of a calendar to help you distinguish it from other calendars, or just to change it to your favorite color.

1. Click the **View** tab on the Ribbon.
2. Click the **Color** button in the Color group and select the color you want.

Change the calendar font

You can also change the font that the Calendar uses. For example, you could increase the style and size of the font to make it easier to read.

1. In the Calendar, click the **View** tab on the Ribbon.
2. Click the **View Settings** button in the Current View group.
The Advanced View Settings: Calendar dialog box appears.
3. Click the **Other Settings** button.
The Format View dialog box appears.
4. Use the buttons to choose the fonts and sizes that you want to use. Click **OK**.

& Exercise

- **Exercise File:** None required.
- **Exercise:** View the calendar in 10 minute intervals.
Change the background color of the calendar to gray.
Return the calendar to display the time scale in 30 minute intervals and the background color to the default blue.

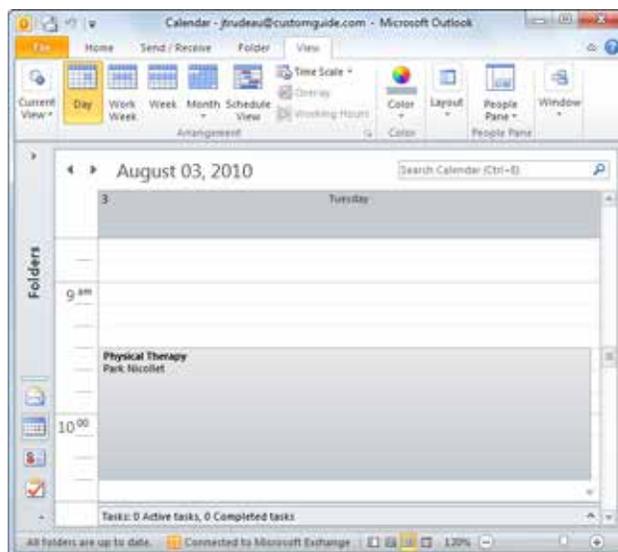


Figure 6-20: Day view displayed in 10 minute intervals.

Changing Work Days and Times

The Outlook calendar is set up for an employee who works Monday through Friday, 8 a.m. to 5 p.m. But in today's world of flexible schedules, many people work different days and hours. This lesson shows you how to update the work schedule to meet your specifications.

1. Click the **File** tab on the Ribbon.
Backstage view appears.
2. Click the **Options** button.
The Outlook Options dialog box appears.
3. Click the **Calendar** tab in the dialog box.
The options available for changing the calendar are displayed.
 - **Set the beginning and end of the work day:** Click the **Start time** and **End time** list arrows and select the correct time.
 - **Set work days:** Select the check boxes next to the days of the week that you want to be work days.
 - **Set the first day of the week:** Click the **First day of week** list arrow and select the day that you want.
 - **Set the first week of the year:** Click the **First week of year** list arrow and select the option that you want.
4. Change the work time settings as needed and click **OK**.

The changes are reflected in the Calendar.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Change the work week to Monday through Thursday, 7 a.m. to 6 p.m.

Change back to the default settings: Monday through Friday, 8 a.m. to 5 p.m.

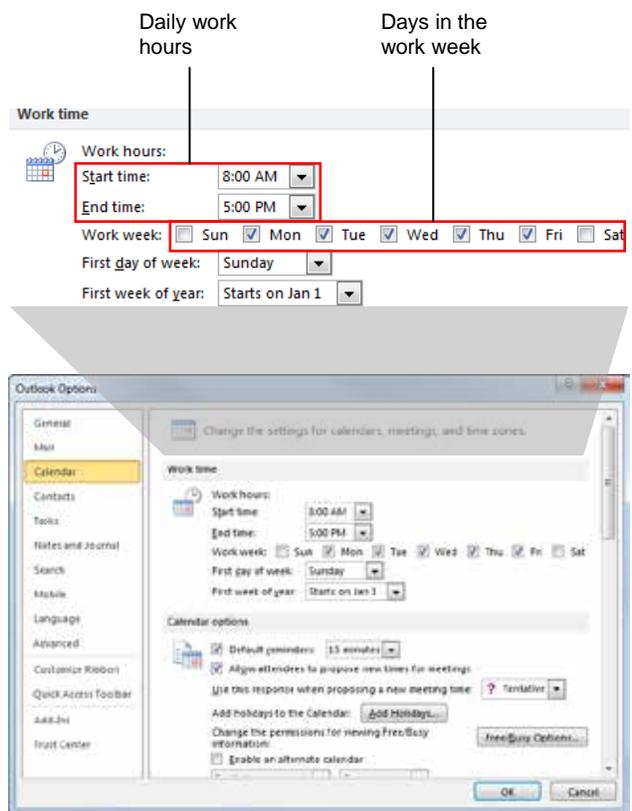


Figure 6-21: Changing Work Time settings.

Creating Additional Calendars

A great way to keep your appointments organized is to create separate calendars for separate types of appointments. For example, you can have one calendar that is strictly for work, and another that is strictly for personal items.

1. Click the **Calendar** button in the Navigation Pane.
2. Click the **Folder** tab on the Ribbon and click the **New Calendar** button in the New group.

The Create New Folder dialog box appears.

Note that Calendar is already selected under where to place the folder and in the folder contains option.

3. Type a name for the new name for the calendar in the Name box. Click **OK**.

The new calendar appears in the Calendar Navigation Pane.

✓ Tips

- ü To delete a calendar, right-click the calendar name in the Navigation Pane, and then select **Delete Calendar** from the contextual menu.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Create a new calendar named “Personal”.

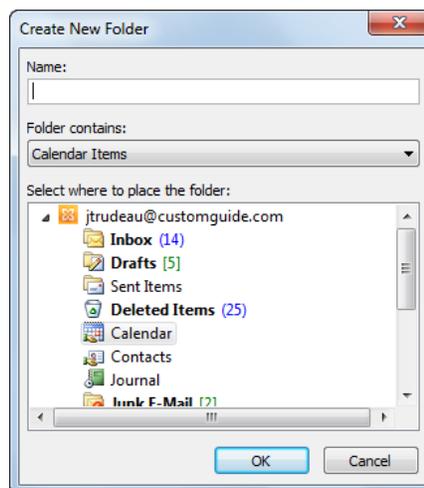


Figure 6-23: The Create New Folder dialog box.

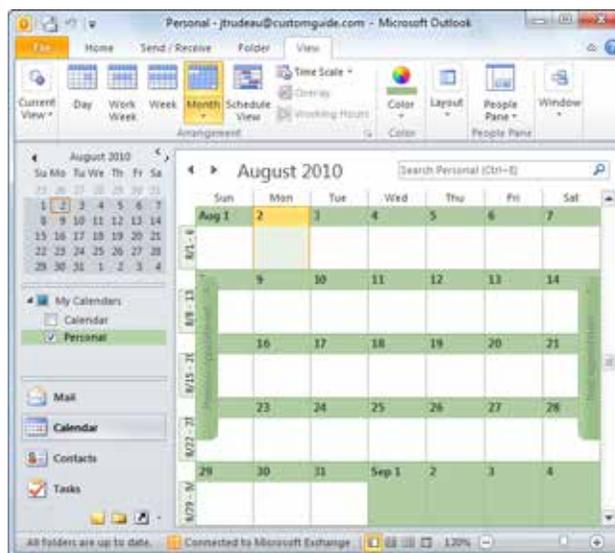


Figure 6-22: The new Personal calendar.

Viewing Calendars Side-by-Side or Overlaid

A valuable aspect of calendars is the ability to view them side-by-side so it's easy to compare their schedules. You can also lay them on top of one another so that it's easier to view any overlapping appointments.

View calendars side-by-side

When multiple calendar check boxes are selected, the calendars are displayed side-by-side.

1. Click the check boxes of calendars you wish to view in the Calendar Navigation Pane.

The calendars that you selected appear side-by-side.

Remove a calendar from side-by-side

1. Uncheck the check box of the calendar you no longer wish to view in the Calendar Navigation Pane.

The calendar is hidden from view, and the remaining calendar is displayed.

- **Other Ways to Remove a Calendar from Side-by-Side:**
Click the **Close Calendar** button on the calendar name tab.

Overlay the calendars

Overlaying calendars lets you see exactly where appointments overlap between calendars.

1. Click the check boxes of calendars that you want to overlay in the Calendar Navigation Pane.

The calendars are displayed side-by-side.

- **Tip:** If you're viewing more than two calendars, each successive calendar opens next to the one most recently opened.

2. Click the **View** tab on the Ribbon and click the **Overlay** button in the Arrangement group.

That calendar is now in overlay mode with the one you opened first.

✓ Tips

- To add another calendar to the overlay, click the calendar check box in the Calendar Navigation Pane. Then click the **View in Overlay Mode** button next to the name of the calendar.

& Exercise

- **Exercise File:** Personal calendar
- **Exercise:** View the Personal calendar side-by-side with the default calendar.

To the Personal calendar, add an appointment for tomorrow with these details:

Subject: Soccer game
Location: Meeker Field
Start time: 3 p.m.
End time: 5 p.m.

Overlay the calendars. Note how appointments from both calendars are displayed.

Hide the Personal calendar.

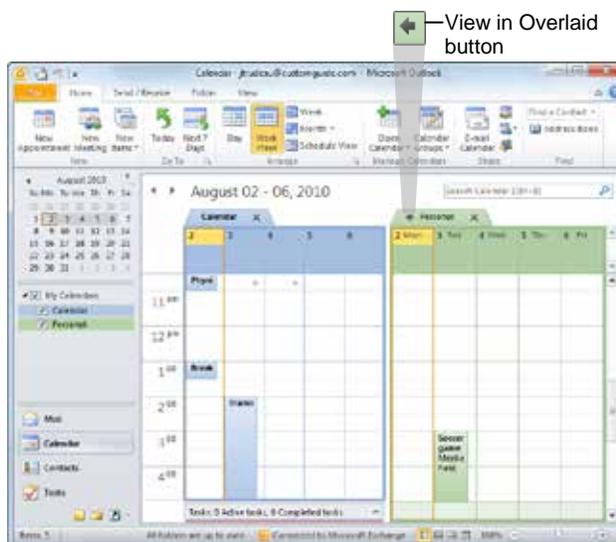


Figure 6-24: The calendars displayed side-by-side.



Figure 6-25: The calendars displayed overlaid.

Remove a calendar from the overlay stack

1. Locate the tab of the calendar that you want to remove from the overlay stack.
2. Click the **View in Side-by-Side Mode** button.

The calendar moves back to the right so the calendars are displayed side-by-side and are no longer overlaid.

 **Tip:** The View in Side-by-Side Mode button is the same button used to view calendars overlaid.

Printing the Calendar

Printing the Calendar is no different than printing anything else in Outlook, except for a few unique Calendar-related options that you need to be aware of. You can customize the Calendar print settings so your printed calendar looks the way you want it to. For example, you can specify Daily, Weekly, or Monthly formats and the range of dates you want print.

1. Click the **File** tab on the Ribbon and select **Print**.

Backstage View appears with a preview of the currently selected print style. There are several different ways to print the calendar. Check out Table 6-4: Calendar Print Styles for descriptions of different print styles.

2. Select the print style you wish to use and click **Print** to begin printing.

Other Ways to Print the Calendar:
Press **<Ctrl> + <P>**.

Tips

- Click the **Print Options** button to change the number of copies or the time range to be printed.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Preview and print the current week in Weekly Style.

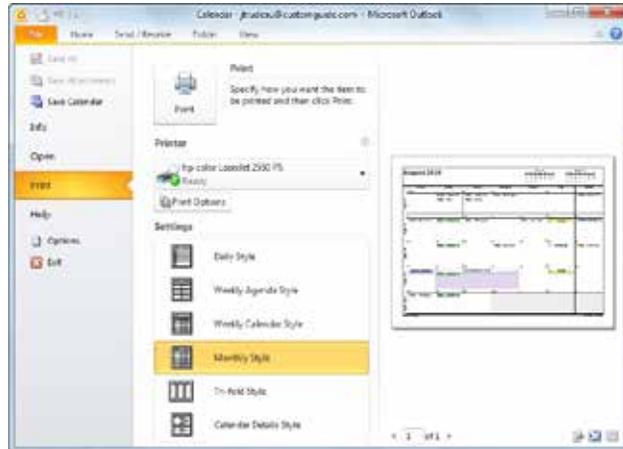


Figure 6-26: The Print Settings in Backstage View.

Table 6-4: Calendar Print Styles

Daily	Prints one day per page, from 7:00 AM to 7:00 PM, with tasks and notes areas for the next month. This is the most detailed calendar style.
Weekly Agenda Style	Prints the schedule of one week on one page with space for notes and tasks.
Weekly Calendar Style	Prints the schedule of one week on one page in a calendar/time slot arrangement.
Monthly Style	Prints a calendar similar to the type you hang on your wall: one month per page without tasks and notes areas.
Tri-fold Style	This is a printout broken into three parts: One section that displays the hours and appointments in the selected day, one section that displays the task list, and one section that displays the appointments in a selected week.
Calendar Details Style	This is a printout of all calendar items that are currently displayed, arranged in a list.

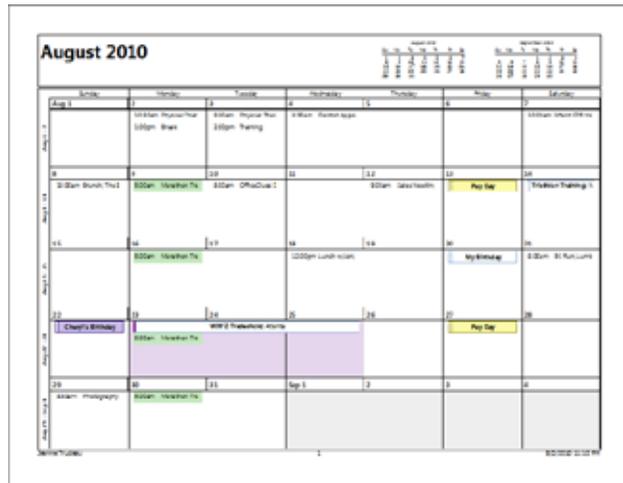


Figure 6-27: A preview of the Monthly Style.

Adding a Second Time Zone

If you frequently travel to a different time zone, or you work with a colleague in another time zone, it can be very helpful to be able to reference that time zone when making arrangements for appointments.

A second time zone does not affect how appointments or other calendar items are saved or displayed, it is only a reference for planning your schedule.

1. In the program window, click the **File** tab on the Ribbon and select **Options**.

The Outlook Options dialog box appears.

2. Click the **Calendar** tab.

3. Scroll down to view the Time zones section.

 **Tip:** If you need to change the default time zone in Outlook, click the **Time zone** list arrow and select the time zone you want to switch to. All Calendar items and views are updated to the new time zone.

4. Click the **Show a second time zone** check box.

 **Tip:** To clear the time zone, uncheck the Show a second time zone check box.

5. Click the **Label** text box and enter a name for the second time zone.

6. Click the **Time zone** list arrow and select the time zone that you want to add.

7. Click **OK**.

The second time zone is now displayed to the left of the default time zone in the Day and Week views of the calendar.

 **Tips**

ü The second time zone is used only to show a second time bar in Calendar view and does not affect the way in which calendar items are stored or displayed.

ü Click **Swap Time Zones** to switch the time zones' position in the Calendar.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Add a second time zone of your choosing to the Outlook Calendar.

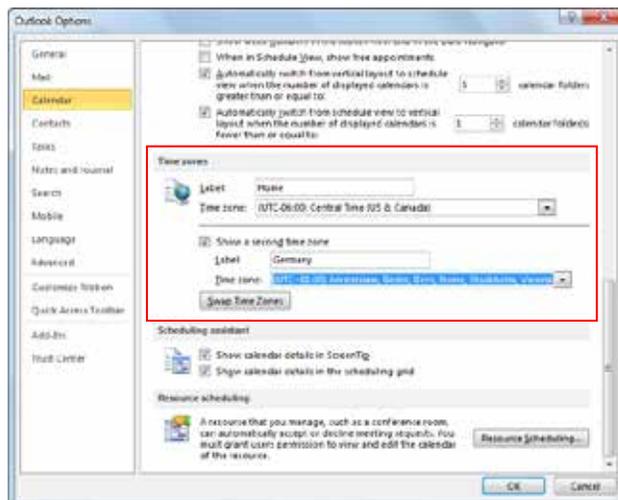


Figure 6-28: Adding a second time zone in the Outlook Options dialog box.

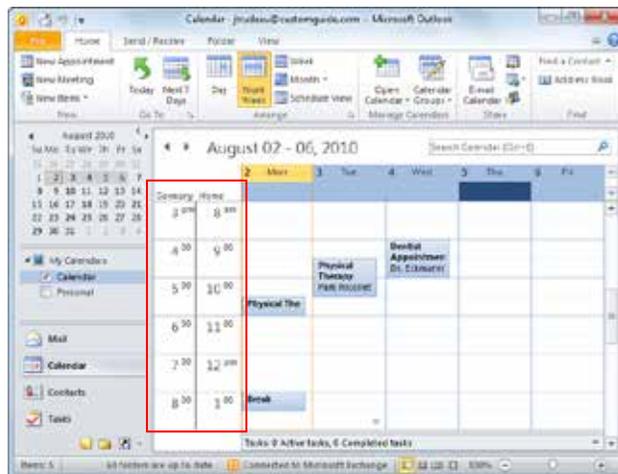


Figure 6-29: The two time zones displayed in the Calendar.

Using the Calendar Review

Quiz Questions

64. Which view displays the seven days of the current week?
- A. Week view
 - B. Work Week view
 - C. Next 7 Days
 - D. Schedule View
65. When do the Previous and Next Appointment buttons appear?
- A. They are always displayed.
 - B. When the navigation buttons are hidden.
 - C. When no results appear for a search.
 - D. When no appointments are scheduled for the current day or week.
66. An *appointment* is any scheduled activity that takes place within a one-day time period. (True or False?)
67. At what time of the day do events start?
- A. Events do not have a start or end time. An event is a day-long affair.
 - B. 8 a.m., or the start of the work day.
 - C. At the time of the first appointment scheduled for the same day.
 - D. None of these.
68. The fastest way to reschedule an appointment is by clicking and dragging. (True or False?)
69. Which of the following appointments could NOT be scheduled using Outlook's recurring appointment feature?
- A. An appointment held on the first Monday of every month.
 - B. A mystical ceremony that occurs during each full moon.
 - C. A status meeting held every other Thursday.
 - D. A birthday that falls on April 7th of every year.
70. You cannot edit a single occurrence of a recurring appointment; you have to edit the entire series. (True or False?)
71. Which of the following is not an availability option in Outlook?
- A. Busy
 - B. Out of Office
 - C. Tentative
 - D. Be Right Back
72. The preset color categories can be edited to meet your needs. (True or False?)
73. Appointment reminders are set at 15 minutes by default. (True or False?)

74. *Active* view displays all of the appointments in your Calendar. (True or False?)
75. Calendars can only display time in 30 minute intervals. (True or False?)
76. You can change the start and end time of the calendar but not work days. (True or False?)
77. You can only have one calendar at a time in Outlook. (True or False?)
78. What happens when you click the check box of a another calendar in the Navigation Pane?
A. The calendar is displayed on top of the current calendar.
B. The calendars are overlaid.
C. The calendar is displayed and the current calendar is closed.
D. The calendar appears next to the current calendar.
79. Which of the following is NOT a Calendar Print Style?
A. Daily
B. Monthly
C. Calendar Details
D. Appointments
80. When you add a second time zone, it appears in Monthly view of the calendar. (True or False?)

Quiz Answers

64. A. Week view displays the seven days of the current week.
65. D. The Previous and Next Appointment buttons only appear when no appointments are scheduled for the current day or week.
66. True. An *appointment* is any scheduled activity that takes place within a one-day time period.
67. A. Events do not have a start or end time. They last the entire day.
68. True. The fastest way to reschedule an appointment is by clicking and dragging, but you can also reschedule an appointment using the Appointment window.
69. B. The current version of Outlook does not support recurring appointments based on lunar cycles.
70. False. You can edit a single occurrence or the entire series of a recurring appointment.
71. D. You can select Busy, Tentative, Free, or Out of Office for your availability in Outlook.
72. True. Outlook's default color categories can be edited to meet your needs.
73. True. Appointment reminders are set at 15 minutes by default, and event reminders are set at 18 hours by default.

- 74. False. *List* view displays all of the appointments in your Calendar.
- 75. False. Calendars can display time from 5 minute to 60 minute intervals.
- 76. False. You *can* change the start and end time of the calendar.
- 77. False. You can create additional calendars in Outlook.
- 78. D. When more than one calendar check box is selected, the calendars are displayed next to each other, side by side.
- 79. D. *Appointments* is not a Print Style.
- 80. False. Times are not displayed in Monthly view, but views like Day, Work Week, and Week do display the second time zone.

Collaborating with Other Users

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With Microsoft Outlook, you can keep track of your committee's next meeting on your calendar, lay out the all tasks you need to finish, and use e-mail to communicate with people outside your committee. Wouldn't it be nice if the rest of your committee had access to all of that information?

Fortunately, they do. Outlook lets you share your appointment schedule, send out polls, and even add content to other people's folders. A few of these options require Microsoft Exchange Server, but more and more of them are becoming available just using an Internet connection.

If part of your job is getting large groups of people to agree on anything, read this chapter carefully.

Sharing Your Calendar

If you're not the person in the office who schedules meetings, count your blessings. Then share your calendar to make things easier for the poor soul saddled with that responsibility. Outlook 2010 provides a few ways to share your calendar with others. This lesson will show you how to share your calendar with coworkers using Microsoft Exchange.

Share your calendar

Exchange users can share their own calendars with other users on the server. This lets other people view your schedule.

1. Click the **Calendar** button in the Navigation Pane.

The calendar appears. Links to other calendars are displayed in the Navigation Pane.

2. Click the **Home** tab on the Ribbon and click the **Share Calendar** button in the Share group.

A Sharing invitation message window appears.

3. Enter the people you would like to share your calendar with in the To box.

4. Type information into the Subject line and Message body.

5. (Optional) If you would like permission to view the calendars of the people to whom you are sending an invitation, click the **Request permission to view recipient's calendar** check box.

Tip: You can only request access to the recipient's default calendar. If you would like permission to view a different calendar, you must send a separate request.

6. Click **Send**.

A dialog box appears, asking you to confirm the invitation.

7. Click **Yes**.

The invitation is sent. The recipient can now access your calendar.

Other Ways to Share Your Calendar:

If someone sends you a sharing request via e-mail, click **Allow**, then click **Yes**.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Share your calendar with three other people.

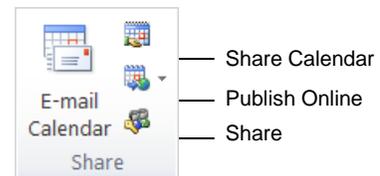


Figure 7-1: The Share group on the Ribbon.

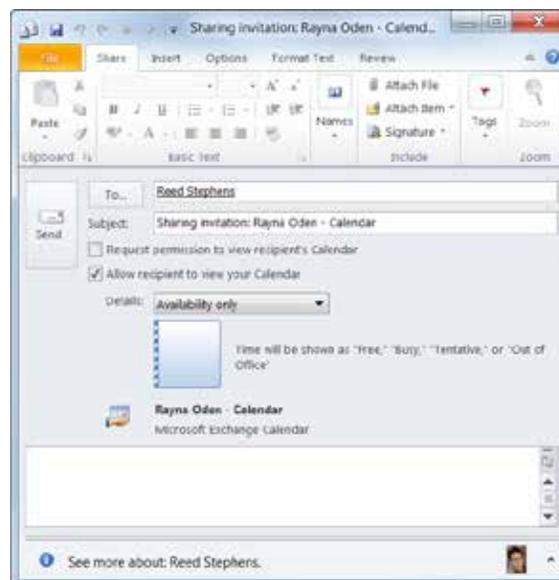


Figure 7-2: A Sharing invitation for others to view your calendar.

Change other people’s access to your calendar

Committees change, people move on, and that weird guy from accounting is scheduling his breaks so he can talk to you about his medical problems. It’s a good thing that you can change or revoke someone’s access permissions to your calendar.

1. Click the **Calendar** button in the Navigation Pane.

The Calendar is displayed.

2. Right-click the calendar for which you’d like to change in the Navigation Pane and select **Properties** from the contextual menu.

The General tab of the Calendar Properties dialog box appears.

- 🔗 **Other Ways to Change Calendar Access:**
 Select the calendar for which you’d like to change permissions in the Navigation Pane. Click the **Home** tab on the Ribbon and click the **Share** button in the Share group.

3. Click the **Permissions** tab.

The Permissions tab of the Calendar Properties dialog box appears.

4. In the Name box, select the name of the person whose access you want to change.

✔ **Tip:** To remove or change access permissions for everyone, click **Default** in the Name box.

5. Click the **Permission Level** list arrow and select the permission level you want to assign to the person.

When you select different permission levels, the options that are selected in the Read, Write, Delete items, and Other sections change.

6. Click **OK** when you are finished.

The access permissions for this user have been changed.

✔ **Tip:** If you want to limit access permissions instead of revoking them, select a different option to change permissions.

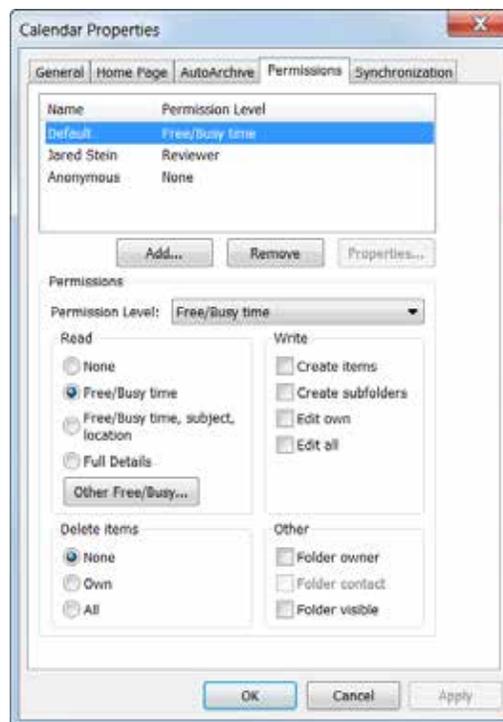


Figure 7-3: The Permissions tab of the Calendar Properties dialog box.

Table 7-1: Access Permission Roles

Owner	Create, read, modify, and delete all items and files, and create subfolders. As the folder owner, you can change the permission levels others have for the folder.
Publishing Editor	Create, read, modify, and delete all items and files, and create subfolders.
Editor	Create, read, modify, and delete all items and files.
Publishing Author	Create and read items and files, create subfolders, and modify and delete items and files you create.
Author	Create and read items and files, and modify and delete items and files you create.
Nonediting Author	Create, read, and delete items and files you create. Cannot modify items.
Reviewer	Read items and files only.
Contributor	Create items and files only. The contents of the folder do not appear.
Free/Busy time, subject, location	View free and busy times along with the subject and location of busy times.
Free/Busy time	View free time and busy time.
None	Cannot open the folder; you have no permission.

Opening Shared Calendars

Getting several people to coordinate schedules can feel like herding butterflies. Outlook makes the process easier by letting you view other people's calendars and share your calendar with them. When your company uses Microsoft Exchange, you can view the calendars that your coworkers have opted to share, provided you have their permission to do so.

1. Click the **Calendar** button in the Navigation Pane.
The Calendar opens.
2. Click the **Home** tab on the Ribbon, click the **Open Calendar** button in the Manage Calendars group, and select **Open Shared Calendar** from the list.
The Open a Shared Calendar dialog box appears.
3. Click the **Name** button.
The Select Name dialog box appears.
4. Select the contact whose calendar you want to view and click **OK**.
The Select Name dialog box closes, and the contact's name appears in the Open a Shared Calendar dialog box.
5. Click **OK**.

If you have been given permission to view the calendar, it now appears in the Outlook window. Also, the contact's name appears in the Shared Calendars area of the Navigation Pane.

Tip: If you have not received permission to view a calendar, a dialog box asking if you would like to request permission to view the calendar appears. Click **Yes**, then complete the e-mail permissions request and click **Send**. If you are granted permission to view the calendar, you will receive an e-mail from the contact.

Tips

- ü You can view up to 30 calendars side-by-side.
- ü Display or hide shared calendars by clicking the check box of a shared calendar you have opened previously in the Shared Calendars area of the Navigation Pane.
- ü When you request permission to view other people's calendars, you can send them a sharing invitation to view yours.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Open a shared calendar.

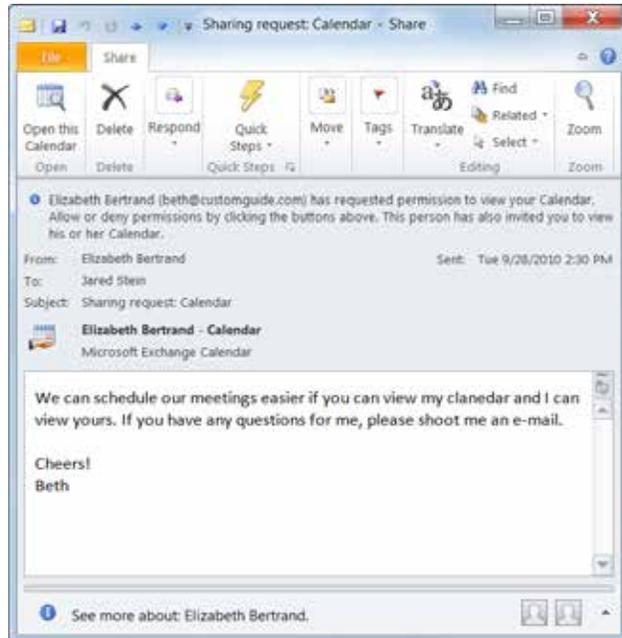


Figure 7-4: A Sharing request to view someone else's calendar.

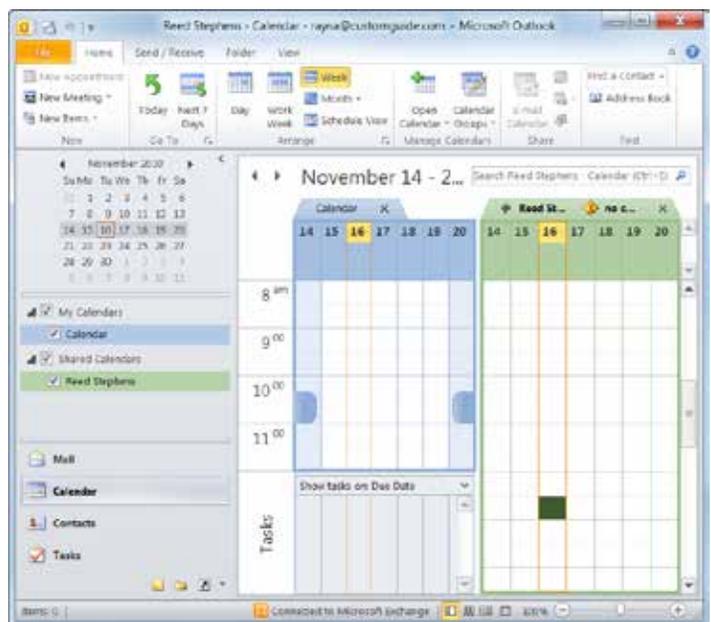


Figure 7-5: Viewing calendars side-by-side.

Using Schedule View

In the past, you could only view multiple calendars side-by-side in Outlook. Outlook 2010 makes it easier to view multiple calendars with Schedule view. Schedule view displays multiple calendars stacked on top of one another, so you can easily compare calendars.

1. Click the **Calendar** button in the Navigation Pane.

The Calendar appears.

2. Click the **Home** tab on the Ribbon and click the **Schedule View** button in the Arrange group.

The Calendar changes to Schedule view.

3. Select the other calendars you wish to view in the Navigation Pane.

The calendars display stacked on top of one another in the Calendar pane.

& Exercise

- **Exercise File:** None required.
- **Exercise:** View additional calendars in Schedule view.

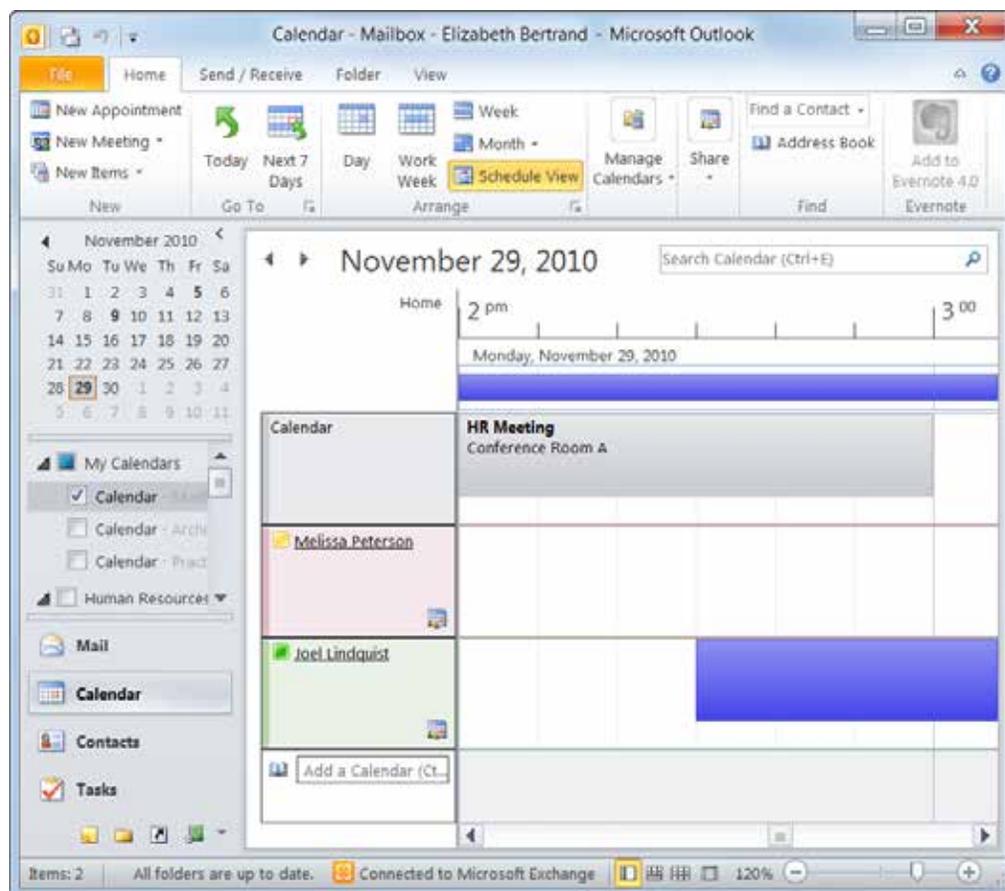


Figure 7-6: Unlike Outlook's other views, Schedule view stacks multiple calendars on top of one another.

Scheduling Meetings

Organizing meetings can be difficult when dealing with many different schedules. Using Outlook, you can check invitee schedules before picking a meeting time. You can also track responses to your meeting request.

Create a meeting request

1. Click the **Calendar** button in the Navigation Pane.
2. Click the **Home** tab on the Ribbon and click the **New Meeting** button in the New group.

An Untitled – Meeting window appears.

Other Ways to Create a Meeting Request:

Click the **Home** tab on the Ribbon, click the **New Item** button in the New group, and select **Meeting** from the list. Or, press **<Ctrl> + <Shift> + <Q>**.

Tip: You can also respond to an e-mail with a meeting request. In the Inbox, click the **Home** tab on the Ribbon and click the **Meeting** button in the Respond group

3. Click the **To** button.
4. Select name of the person you want to invite to the meeting, and then click one of the following buttons:

- **Required:** These people are required to attend.
- **Optional:** These people are not required to attend the meeting.
- **Resources:** These are items needed for the meeting. A resource can be a conference room, a laptop, a projector, or other equipment.

5. When all attendees have been selected, click **OK**.

The selected attendees appear in the To field.

6. Enter a description of the meeting in the **Subject** field.
 7. Enter the meeting place in the **Location** field.
 8. Click the **Scheduling Assistant** button in the Show group on the Ribbon.
- The schedules of the selected attendees are displayed.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Create a new meeting request called “Lunch” for 12:00 PM next Wednesday. Send the request to several contacts.

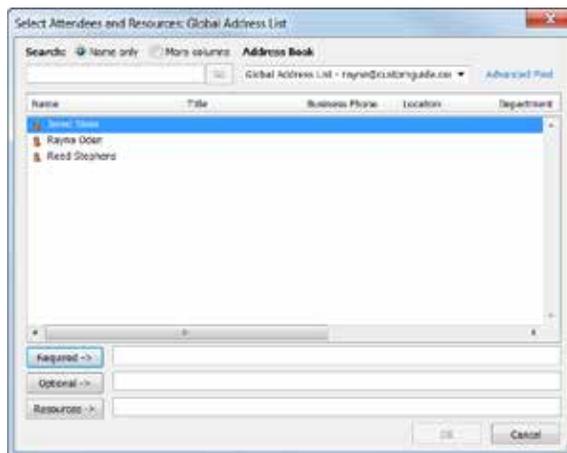


Figure 7-7: The Select Attendees and Resources dialog box.



3:00 PM - 5:00 PM
1 conflict: Joel Lindquist

2:00 PM - 4:00 PM
2 conflicts: Elizabeth Bertr...

2:30 PM - 4:30 PM
2 conflicts: Elizabeth Bertr...

Outlook suggests meeting times based on the schedules of attendees.

Figure 7-8: Use the Scheduling Assistant to determine which times are best for all meeting attendees.

Collaborating with Other Users

There are two ways to select your preferred meeting time:

- By clicking the timeline at the top of the Attendee Availability list.
- By entering the meeting start and end time in the Start time and End time controls.

✔ **Tip:** Instead of scrolling through the Scheduling Assistant, you can find suggested meeting times at the bottom of the Room Finder pane.

9. Select a preferred meeting time and click the **Send** button.

Your meeting request is sent.

Check responses to a meeting request

1. In the Calendar, select the meeting you want to track.
The Meeting contextual tab appears on the Ribbon.

2. Click the **Meeting** tab on the Ribbon and click the **Tracking** button in the Attendees group.

A list of meeting invitees appears, along with their responses.

✔ Tips

- ü You can only track responses for meetings that you have scheduled.

More about time zones in Outlook

The start and end times for items in the Outlook Calendar are saved in the Coordinated Universal Time (UTC) format, an international time standard similar to Greenwich Mean Time.

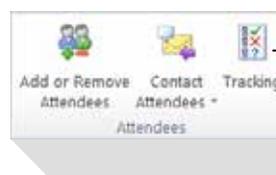
When you send a meeting request to an attendee in a different time zone, the meeting item is displayed at the respective local times on each person's calendar, but saved in UTC.

For example, a meeting organizer in the United States Pacific time zone sends a meeting request for 2:00 P.M. Pacific time to an attendee in the United States Central time zone. The attendee sees the meeting as starting at 4:00 P.M. Mountain time. In both cases, Outlook saves the meeting at the UTC time of 10:00 P.M.

If two time zones are shown, the meeting organizer's time zone is used as the reference point. If you organize a meeting and display free/busy time for invitees from other time zones, their busy times are adjusted so that they appear correctly in your time zone. The second time zone is visible only when you view the calendar in day or week view.



Figure 7-9: A completed meeting request.



Click the Tracking button to view meeting request responses.

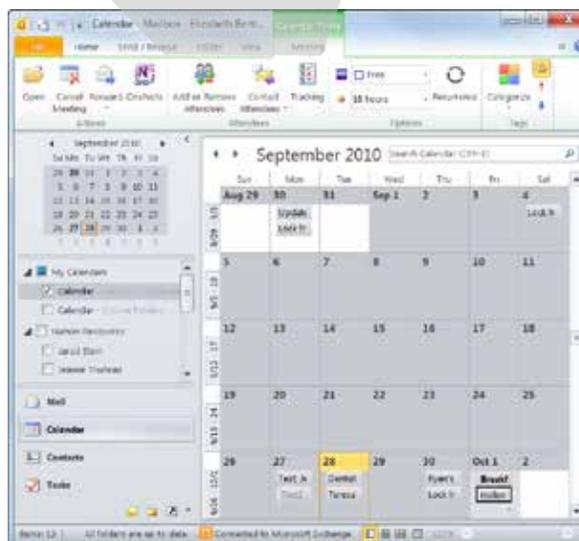


Figure 7-10: The Attendees group on Meeting tab of the Ribbon.

Responding to a Meeting Request

When you receive a meeting request, you should respond to it. The meeting request window has some useful tools that let you respond to a meeting request.

1. Click the **Mail** button in the Navigation Pane.

The Inbox appears. A tiny  icon next to a message indicates a meeting request.

2. Double-click the meeting request.

The meeting request window appears with Quick View displayed, as shown in the example to the right. Quick View provides a brief snapshot of your calendar so you can review your schedule without leaving the meeting request window.

Once you've determined if you are attending the meeting, you can respond to the meeting request from the meeting request window. See the table below, *Response Buttons*, for information about the options to respond to a meeting request.

3. Click the **Meeting** tab on the Ribbon and click the appropriate button in the Respond group.

A list of options appears. The options displayed depend on the response you selected.

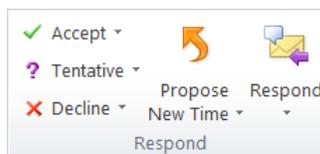
-  **Other Ways to Respond to a Meeting Request:** Select the meeting request in the Inbox and click a response button in the Reading Pane.

4. Select an option from the list and follow the instructions to respond to the meeting request.

Your response is sent.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Accept a meeting request that has been sent to you.



Click a button in the Respond group to respond to a meeting request

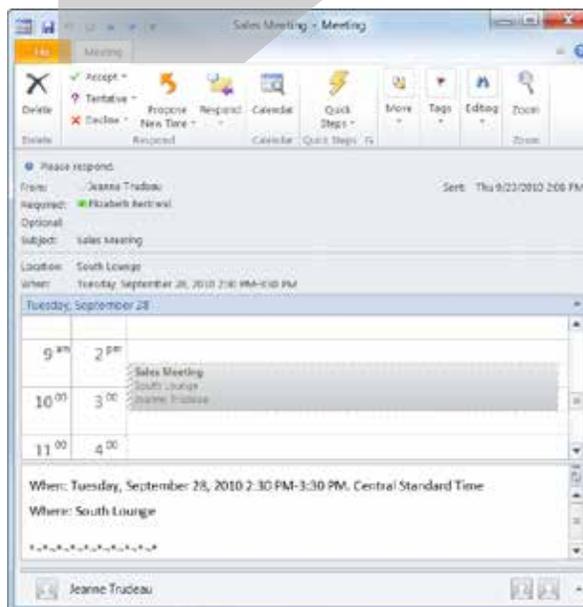


Figure 7-11: Responding to a meeting request.

Table 7-2: Response Buttons

Accept	Outlook adds the meeting to your Calendar. You can choose to send a response to the meeting organizer or not.
Tentative	Outlook adds the meeting to your Calendar and marks it as tentative. You can choose to send a response to the meeting organizer or not.
Decline	Outlook declines the meeting request. You can choose to send a response to the meeting organizer or not.
Propose New Time	Choose to add the meeting to your calendar as a tentative appointment and propose a new time to the meeting organizer, or decline the meeting and propose a new time to the meeting organizer.
Respond	Allows you to respond to the meeting request without accepting or declining the invitation.

Working with Calendar Groups

If you find yourself looking at the same set of calendars frequently, consider creating a calendar group. Calendar groups combine calendars so you can view multiple schedules with one click. Anything with a calendar can be a part of a calendar group. You can also add SharePoint and Internet calendars to a calendar group.

✓ Tips

- ü To use calendar groups, you must have a Microsoft Exchange Server account.

Create a calendar group

1. Click the **Calendar** button in the Navigation Pane. The Calendar appears.
2. Click the **Home** tab on the Ribbon and click the **Calendar Groups** button in the Manage Calendar group. A list of options appears.
3. Select **Create New Calendar Group** from the list. The Create New Calendar Group dialog box appears.

🕒 **Other Ways to Create a Calendar Group:**
If the calendars you want to save as a calendar group are already open, select **Save as New Calendar Group**.

4. Enter a name in the “Type a name for the new calendar group” text box and click **OK**. The Address Book appears.
5. Click the **Address Book** list arrow and select the address book you wish to use. You can create calendar groups using any address book you would like.
6. Browse for members you wish to add, select the member, and click the **Group Members** button. Repeat this step until you have selected every entry you want to add to your calendar group.
7. Click **OK**.

The calendars in the new calendar group are displayed in Schedule View, and the calendar group is added to the Navigation Pane.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Create a calendar group.

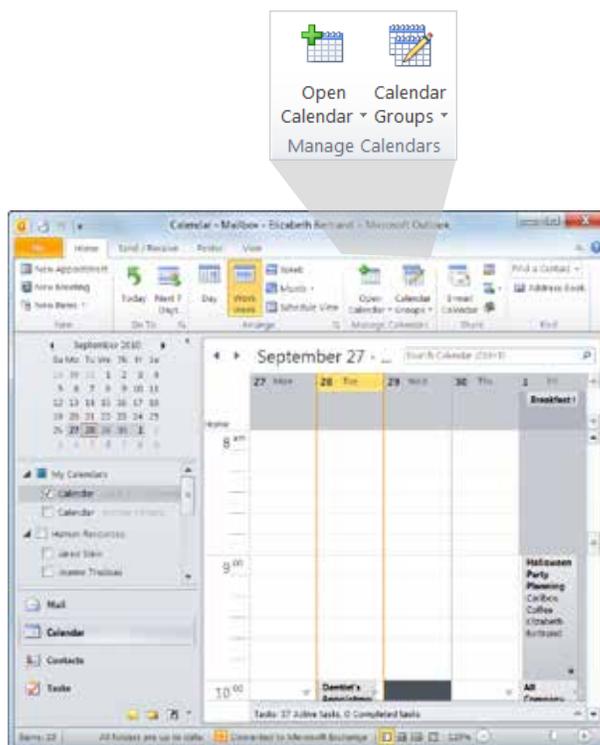


Figure 7-12: The Manage Calendars group.

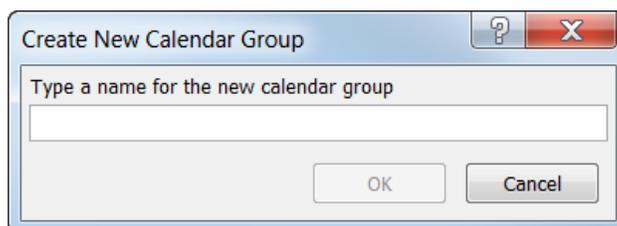


Figure 7-13: The Create New Calendar Group dialog box.

Add a calendar to a calendar group

You can always add another calendar to an existing calendar group.

1. In the Calendar, click the **Home** tab on the Ribbon and click the **Open Calendar** button in the Manage Calendars group.

A list of options appears.

2. Select the type of calendar you wish to add.

Follow the prompts to open the calendar. This new calendar will also appear in the Navigation Pane under Shared Calendars.

3. In the Navigation Pane, click and drag the calendar into the calendar group to which you want to add it.

The new calendar is added to the previously saved calendar group.

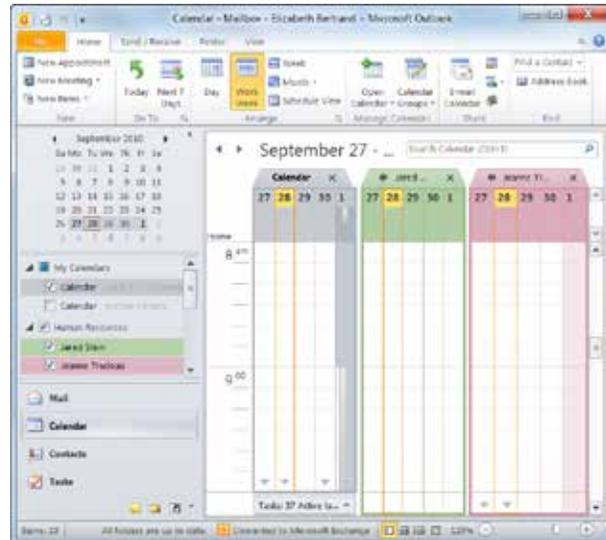


Figure 7-14: A calendar group.

View a calendar group

- In the Navigation Pane of the Calendar, select the calendar group you wish to view.

The calendar group opens.

Marking an Appointment as Private

Many people use Outlook to organize their personal and professional lives. However, you don't want your colleagues to know every dentist appointment, doctor's visit, or soccer game you attend. You can mark appointments as private so the time is shown as busy on your calendar, but others cannot see extra details such as the subject, location, or meeting organizer.

Mark an appointment as private

1. Click the **Calendar** button in the Navigation Pane.

The Calendar appears.

❗ Trap: You can mark a series of appointments as private, but you cannot mark a single occurrence of a recurring appointment, meeting, or event as private.

2. Select the meeting or appointment which you want to mark as private.
3. Click the **Appointment** tab on the Ribbon and click the **Private** button in the Tags group.

A lock icon (🔒) appears in the lower right corner of the appointment.

Other people who view your calendar can see an appointment titled "Private Appointment," but they cannot view any appointment details.

🔑 Other Ways to Mark an Appointment as Private:

Right-click the appointment or meeting and select **Private** from the contextual menu.

✔ Tips

- It's easy make an appointment or meeting public again. Simply select the appointment or meeting you wish to make public, click the **Appointment** tab on the Ribbon, and click the **Private** button in the Tags group.

& Exercise

- **Exercise File:** None required.
- **Exercise:** If necessary, create an appointment.

Mark an appointment as private.

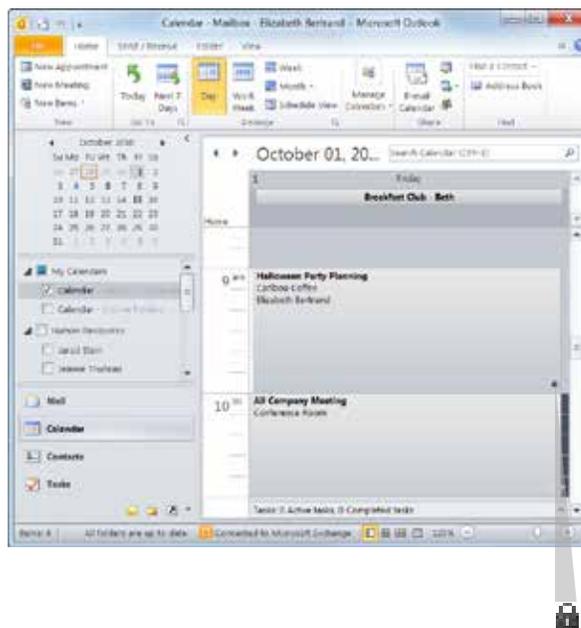


Figure 7-15: A lock icon indicates an appointment has been marked as private.

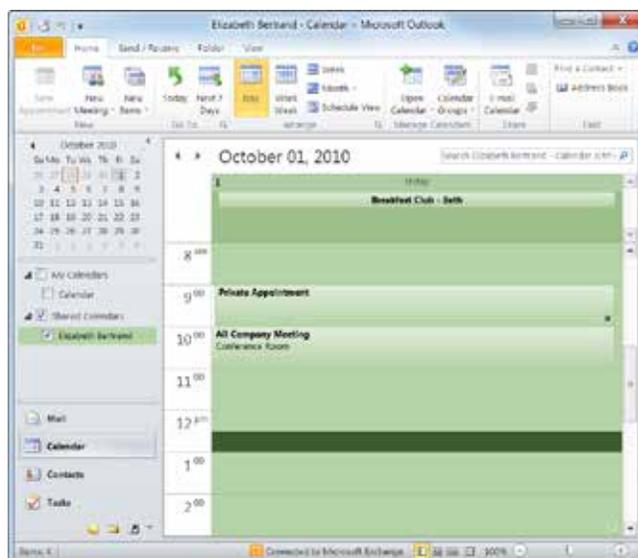


Figure 7-16: If someone else views your calendar, they can only see that you have a Private Appointment scheduled.

Avoid printing private appointments

If you print a copy of your calendar, make sure to avoid printing details about private appointments.

1. Click the **File** tab on the Ribbon and select **Print**.

Options for printing your calendar appear.

Other Ways to Print a Calendar:
Press **<Ctrl> + <P>**.

2. Click the **Print Options** button.

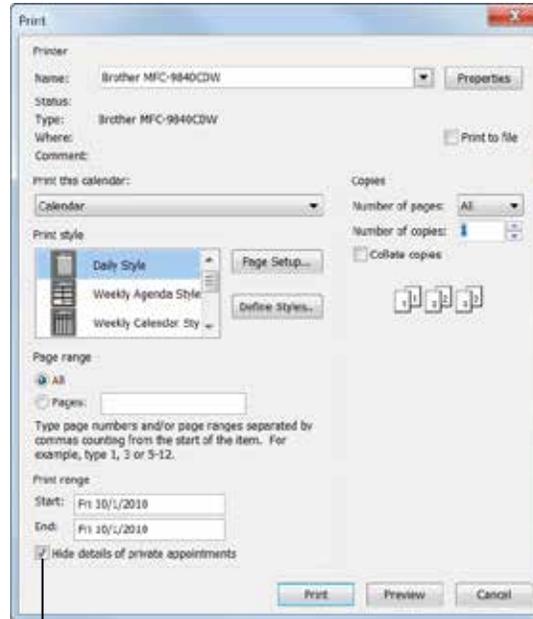
The Print dialog box appears.

3. Select the **Hide details of private appointments** check box under Print Range.

Your appointment will appear as Private Appointment on the printed calendar.

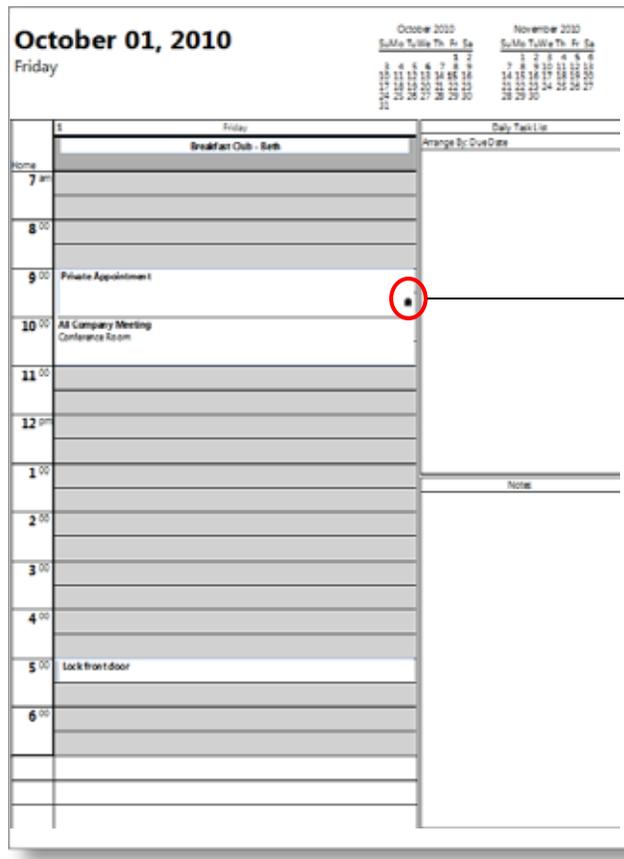
4. Select any other printing options and click **Print**.

Your calendar prints.



Click the check box to hide details of private appointments on printed calendars.

Figure 7-17: The Print dialog box.



Indicates a private appointment

Figure 7-18: A printed calendar.

Publishing Your Calendar on the Internet

If you don't use Microsoft Exchange, you can still share your calendar with other people by publishing it on Office.com.

Publish your calendar to Office.com

You can grant access to your calendar to coworkers and friends by publishing it on Office.com.

1. Click the **Calendar** button in the Navigation Pane.

The Calendar appears, with calendar sharing links displayed in the Navigation Pane.

2. Click the **Home** tab on the Ribbon and click the **Publish Online** button in the Share group.

A list of options appears.

3. Select **Publish to Office.com**.

The Office.com Registration dialog box appears.

4. Click the **Sign In** button. Follow the instructions to sign in to Microsoft Windows Live ID using your e-mail address and password.

If you have a Windows Live account, such as Hotmail, that information can be used to sign in.

If you do not have a Windows Live ID, you can create one by clicking the link marked "Sign Up for A Free Account" and following the registration instructions.

Tip: If you are already signed in to your Windows Live account, this step will be skipped.

Once you sign in, the Publish Calendar to Office.com dialog box appears.

5. Use the Time Span list arrows to select a time span.

You can make up to 180 days of your calendar available.

6. Click the **Detail** list arrow to select the amount of detail you want to share.

- **Availability Only:** Other users can only see if you are Free, Busy, Tentative, or Out of Office.
- **Limited Details:** Other users can see availability as well as the subject of the appointment.
- **Full Details:** Other users will be able to view all of the details for each appointment.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Publish your calendar to the Internet.



Figure 7-19: Signing in to publish a Calendar.

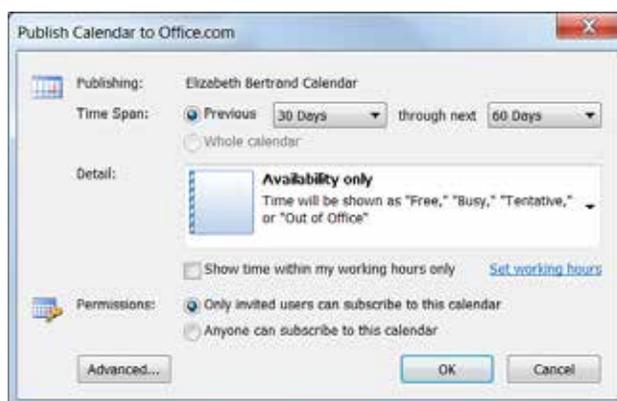


Figure 7-20: Publishing a calendar to Office.com.

✔ **Tip:** Click the **Show time within my working hours only** check box to only share calendar details for your working hours.

7. Select a Permissions option to restrict access to your calendar or make it accessible to everyone.

There are two permissions options:

- **Only invited users can view this calendar:** If your calendar is restricted to certain users, Outlook will let you send a sharing invitation.
- **Anyone can subscribe to this calendar:** This allows anyone in the Office.com community to subscribe to your calendar. You can also send a sharing invitation to specific users.

8. Click **OK**.

The calendar is published online.

✔ Tips

- ü If you chose to restrict your calendar to invited users, you will be asked to send a sharing invitation. Click **Yes**, then complete the e-mail message by adding recipients' names and other information. Click **Send**.

Remove your calendar from Office.com

You can remove your calendar from Office.com at any time.

1. Click the **Calendar** button in the Navigation Pane.
The Calendar appears.
2. Right-click the calendar you wish to remove from Office.com and select **Share @ Remove from Server** from the contextual menu.

The calendar is removed from Office.com.

🔴 Other Ways to Delete the Calendar:

Click the **Home** tab on the Ribbon, click the **Publish Online** button in the Share group, and select **Remove from Server** from the list.

✔ Tips

- ü Once a calendar has been removed from the server, you will not be able to view it from Office.com. To share the calendar again, you must re-publish it.

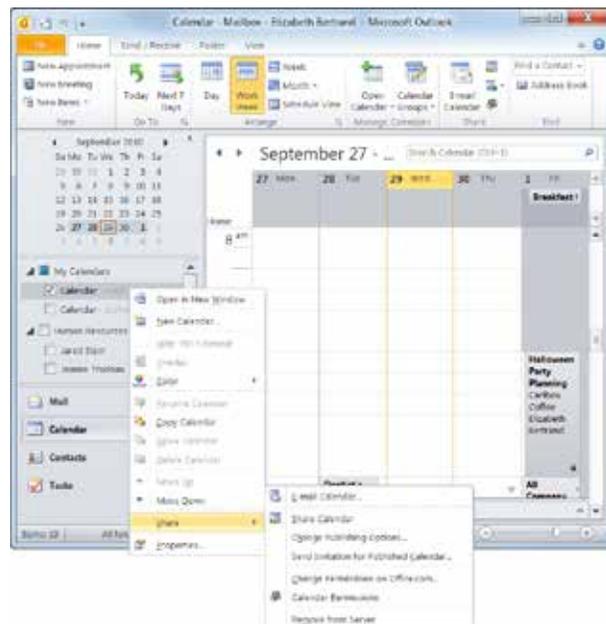


Figure 7-21: Removing a calendar from Office.com.

Sharing Outlook Folders

This lesson discusses how to share Outlook folders, such as Contacts or Tasks, with others on your Exchange network.

✓ Tips

ü These options are only available to people using Microsoft Exchange Server. If you are using a home version of Outlook, or if your organization does not use Exchange Server, you won't be able to complete these tasks.

Share a folder

Allow other people in your office to read the contents of your Contacts, Calendar, Journal, Notes, and Tasks folders.

1. Click the **Folder List** button in the Navigation Pane. The Folder List appears.
2. Right-click the folder you want to share, select **Share** from the contextual menu, and select the item you wish to share from the submenu.

A Sharing invitation window appears.

3. Click the **To** button and select the contact(s) with whom you want to share the folder. Click **OK**.
Once the contacts you want to share the folder with are entered, you're ready to send the message.

4. Click **Send**.
A dialog box appears, asking you to confirm the invitation.

5. Click **Yes**.
The folder has been shared.

Open a shared folder

You can open other people's folders if they have given you permission to open them.

1. Click the **File** tab on the Ribbon and select **Open**.
Options for opening files appear.

2. Click **Other User's Folder**.
The Open Other User's Folder dialog box appears.

- **Other Ways to Open a Shared Folder:**
Click the **Open this folder** button in a sharing

& Exercise

- **Exercise File:** None required.
- **Exercise:** Share your Contacts folder with someone.

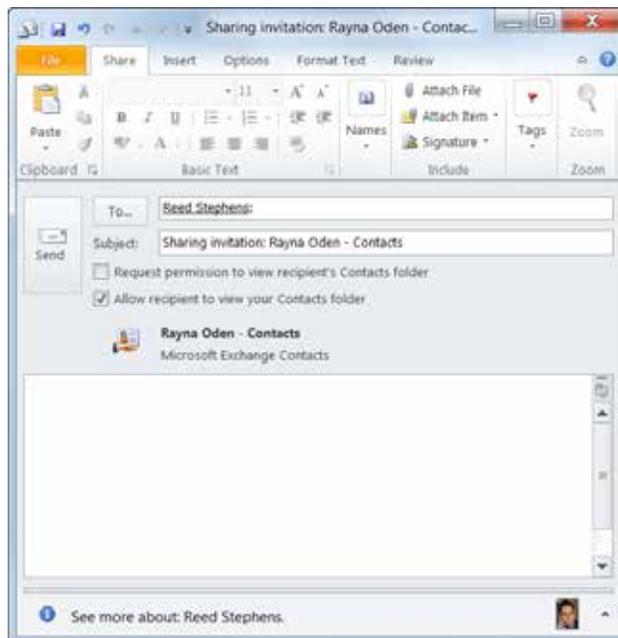


Figure 7-22: A Sharing Folders invitation.

Table 7-3: Access Permission Roles

Owner	Create, read, modify, and delete all items and files, and create subfolders. As the folder owner, you can change the permission levels others have for the folder.
Publishing Editor	Create, read, modify, and delete all items and files, and create subfolders.
Editor	Create, read, modify, and delete all items and files.
Publishing Author	Create and read items and files, create subfolders, and modify and delete items and files you create.
Author	Create and read items and files, and modify and delete items and files you create.
Non-editing Author	Create and read items and files, and delete items and files you create. Cannot modify items.
Reviewer	Read items and files only.
Contributor	Create items and files only. The contents of the folder do not appear.
None	Not open the folder; you have no permission.

invitation that you receive from the individual sharing their folder with you.

3. Click the **Name** button.

The Select Name dialog box appears with a list of names from your Address Book.

4. Double-click the contact who owns the folder you want to open.

The contact's name appears in the Open Other User's Folder dialog box, and the available folders appear under the Folder type list arrow.

5. Click the **Folder type** list arrow and select the folder you want to open.

6. Click **OK**.

You can now view another user's folder.

- ✔ **Tip:** If you have not received permission to view a folder, a dialog box asking if you would like to request permission to view the folder appears. Click **Yes**, then complete the e-mail permissions request and click **Send**. If you are granted permission to view the folder, you will receive an e-mail from the contact.

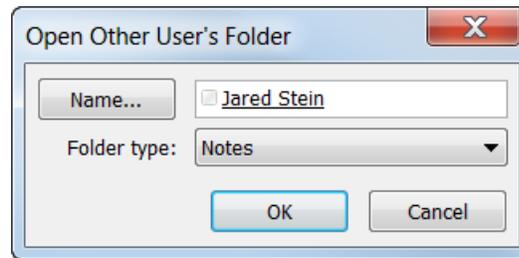


Figure 7-23: The Open Other User's Folder dialog box.

Giving Delegate Permissions

Busy managers may delegate the management of their calendar, schedule, and even e-mail, to an assistant using delegate permissions. Delegate permissions allow the selected individual(s) to send and receive items on your behalf. The most common reason for doing this is to help manage someone else’s schedule for them, although you can also let someone else manage your Inbox, Tasks list, Contacts list, Notes, and Journal.

You can assign different permissions to different delegates. For example, you could give your assistant permission to view, create, and modify items in both your Calendar and Inbox, while giving another coworker permission to view your Calendar—but not to add or modify any appointments.

1. Click the **File** tab on the Ribbon and select **Info**.

Information about your account appears.

2. Click the **Account Settings** button and select **Delegate Access**.

The Delegates dialog box appears.

Notice that you can choose how meeting requests are handled here. The default option sends meeting requests to the delegate and a copy to you.

3. Click **Add**.

The Add Users dialog box appears.

4. Double-click the name(s) of the people you’d like to assign as delegates. Click **OK**.

The Delegate Permissions dialog box appears. There are three permissions available for delegates:

- **Editor:** This is the most powerful permission option. The delegate can read items, create new items, and modify existing items.
- **Author:** Delegate can view existing items and create new ones. The delegate cannot modify.
- **Reviewer:** Delegate can view existing items. The delegate cannot create or modify items.

5. Select delegate permissions as desired and click **OK**.

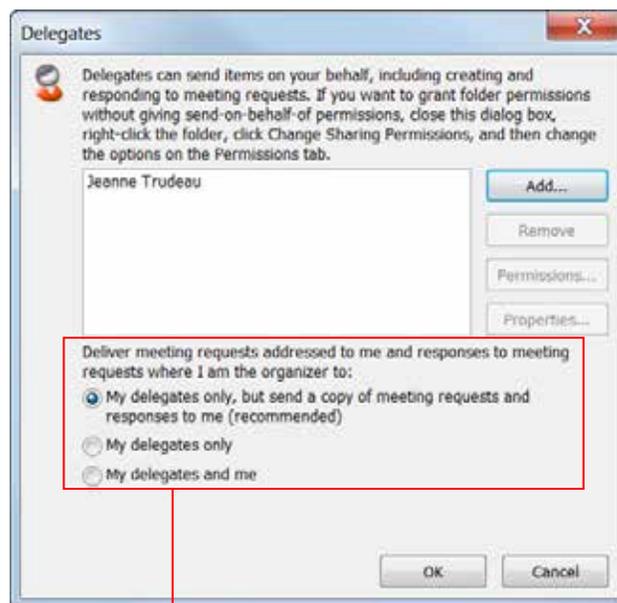
The Delegate Permissions dialog box closes. The default settings will allow your delegate to create and modify items in your calendar and tasks.

6. Click **OK**.

The delegates’ permissions are set.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Delegate Editor status of your Calendar and Tasks folders, and delegate Reviewer status to the Inbox.



Choose how you want meeting requests to be handled by a delegate.

Figure 7-24: The Delegates dialog box.



Figure 7-25: Choose Permission levels for the folders in Outlook.

Taking and Tracking a Vote

Outlook lets you create your own ballots without having to worry about exit polls, the Electoral College, or the dreaded recount. Get your coworkers' opinions on issues by adding voting buttons to an e-mail message.

Send a message to be voted on

Compose your own question and use either the default responses or your own responses.

1. Click the **Mail** button in the Navigation Pane.
2. Click the **Home** tab on the Ribbon and click the **New E-mail** button in the New group.
The Message window appears.
3. Create an e-mail message.
This message should contain the query you'd like people to vote on, either in the Subject line or the message body.
4. Click the **Options** tab on the Ribbon and click the **Use Voting Buttons** button in the Tracking group.

A list appears with suggested responses to your query. They include:

- Approve;Reject
- Yes;No
- Yes;No;Maybe
- Custom: this option lets you create your own response, such as Karen;Andy;Jim.

5. Select the response option you want to use.
Your selection will appear in the recipients' message.

✔ **Tip:** If none of the suggested responses works for your query, select **Custom** and enter your own voting options separated by a semicolon (for example, Mondays;Wednesdays;Fridays).

6. Click the **Send** button.
The message is sent.

✔ **Tip:** You can also track when the message is sent or when it is read by clicking **Request a Delivery Receipt** or **Request a Read Receipt** in the Tracking group.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Take a vote and send it to at least three people, including you.
Respond to the vote and track the results.

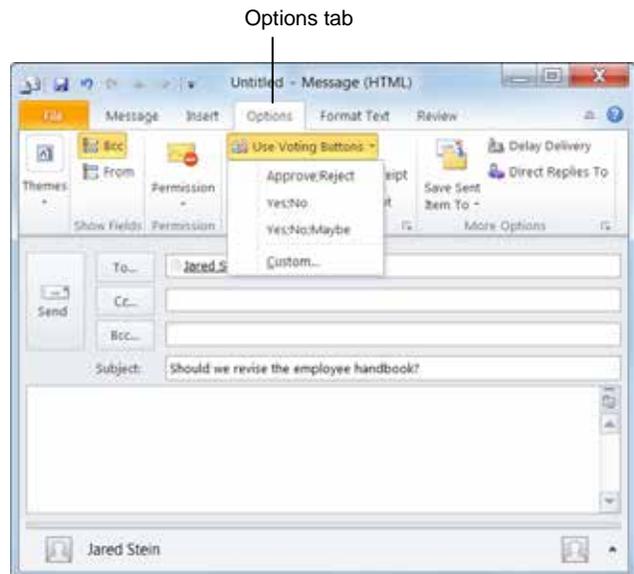


Figure 7-26: The Use Voting Buttons feature is located in the Options tab of the Message window.

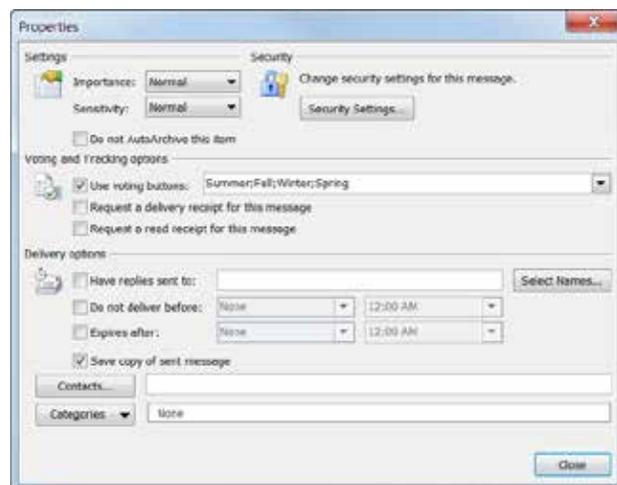


Figure 7-27: Customize the voting buttons in the Properties dialog box.

Respond to a vote

Responding to an e-mail message with voting buttons is very easy.

- Click the Info bar that says **Click here to vote.** in the Reading Pane and select your vote.

The voting response is returned to the sender.

Other Ways to Respond to a Vote:

Open the e-mail and click the **Message** tab on the Ribbon. Click the **Vote** button in the Response group and select your response.

Track votes

After the question has been sent out, check the responses to your question. Outlook totals them for you automatically.

- Click the **Sent Items** folder in the Navigation Pane.

The list of sent messages is displayed.

- Double-click the message whose votes you'd like to track.

The message appears in a new window.

- Click the **Message** tab on the Ribbon and click the **Tracking** button in the Show group.

The e-mail addresses of the people who responded, the time and date they responded, and the responses are all listed in the table. The totals are tallied on a banner near the top of the page.

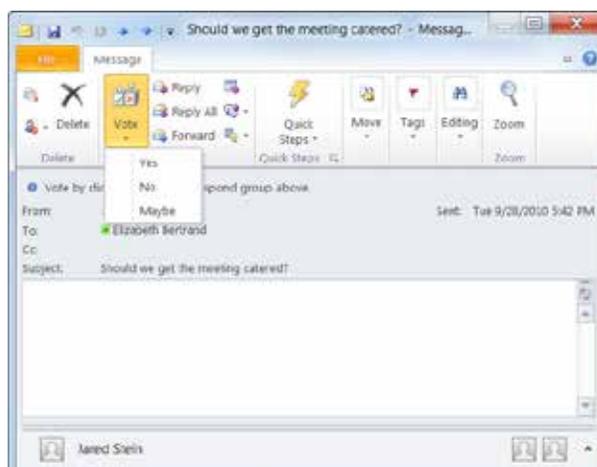


Figure 7-28: Voting in the Message window.

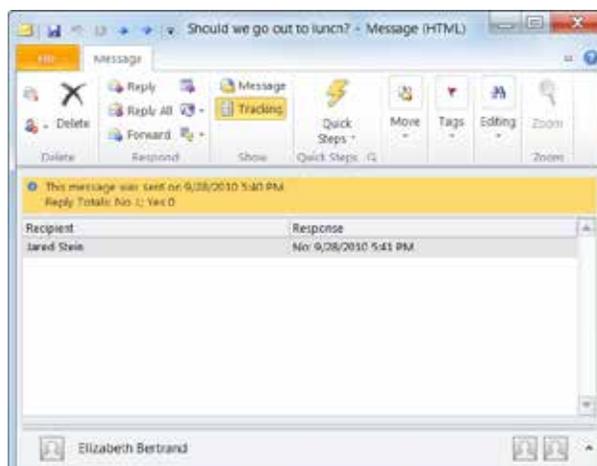


Figure 7-29: The Tracking button on the Message tab.

Working with Public Folders

A public folder is an Outlook folder that can be viewed and accessed by many people on the network. Public folders look just like any other folders. They may contain a list of Contacts used by the entire company or a task list used by an entire department. You can also use public folders to create an online discussion to share ideas on a particular topic or to create a classified ads site for the company.

Open a public folder

Public folders are stored on your organization's Microsoft Exchange server. Anyone on the network who uses the mail server can read and post to the server's public folders—but only if they have the proper access permissions.

1. Click the **Folder List** button in the Navigation Pane.
The Folder List appears. In this view, some of the folders are hidden, but can be viewed by clicking the expand button.
2. Click the **expand** button next to Public Folders.
Public Folders expands and displays the subfolders nested within it.
3. Select the public folder you want to view.
The contents of the public folder appear.

Add new items to a public folder

Public folders are similar to Internet bulletin boards. Most of the time, anyone with access and permission can contribute to them.

1. Select a public folder in the Folder List.
The contents of the public folder appear.
! Trap: You may not have permission to access some public folders.
2. Click the **Home** tab on the Ribbon and click the **New Post** group in the New group.
A new discussion window appears.
3. Type your subject and message.
4. Click the **Post** button.
Your message is saved and joins the list of items in the folder.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Add a new post to a public folder.

Public folders

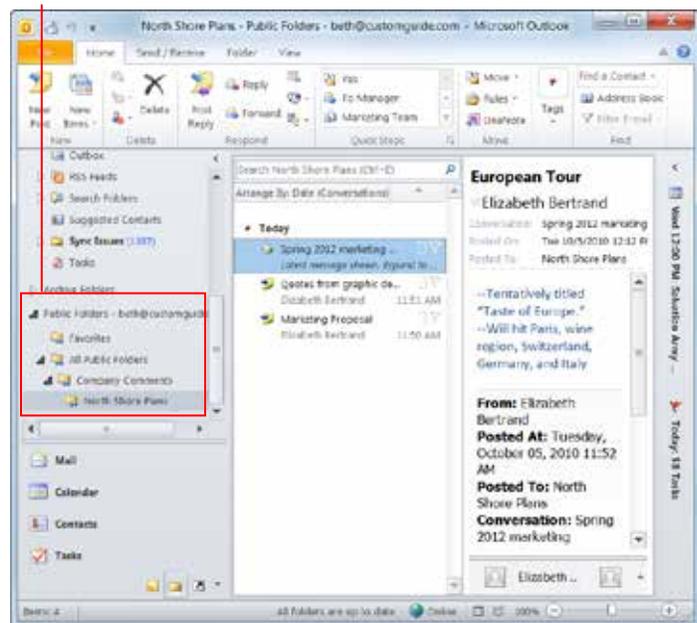


Figure 7-30: Public folders in the Folder List.

Reply to items in a public folder

If someone has started a topic and you'd like to contribute to the discussion, you can post your reply in a public folder.

1. Select a public folder in the Folder List.

The contents of the folder are displayed. All discussions threads are collapsed. Click the **Triangle** icon (▾) to view all posts in a discussion.

2. Double-click the message to which you want to reply.

The message opens.

3. Click the **Discussion** tab on the Ribbon and click the **Post Reply** button in the Respond group.

A Discussion reply window appears. The original message appears below your reply.

Other Ways to Reply to a Post:

Select the message you wish to reply to in the public folder, click the **Home** tab on the Ribbon, and click the **Post Reply** button in the Respond group.

4. Type a subject and message.

Your reply will appear in a different color than the original text.

5. Click the **Post** button.

Your reply appears in the topic's folder.

Tips

- ü Don't forget that public folders are read by a lot of people, so it's important to be courteous and double check what you've written before posting.

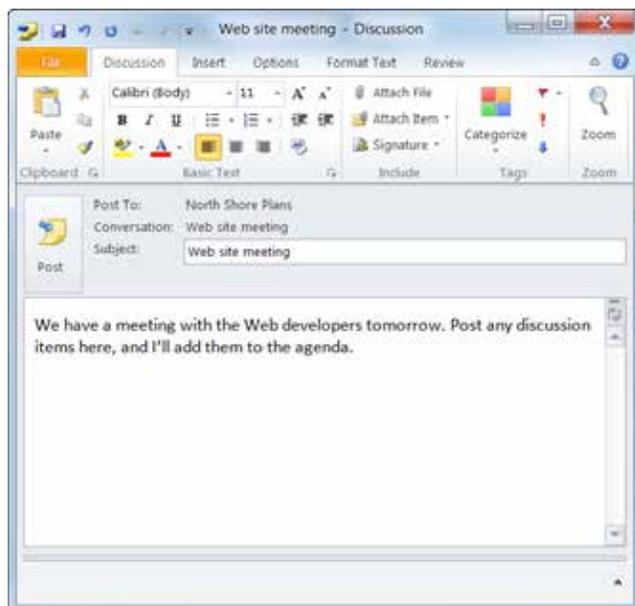


Figure 7-31: Posting a message to a public folder.



Click the Triangle icon to view all messages in a discussion.

Figure 7-32: Expanding a discussion in a public folder.

Collaborating with Other Users

Review

Quiz Questions

81. When you click the Share Calendar button:
- A. Your calendar is instantly shared with everyone in your Contacts.
 - B. You will no longer be able to make changes to your calendar without permission.
 - C. A sharing invitation appears for you to fill out.
 - D. Your calendar is instantly shared with your network administrator, who can assign it to other people.
82. You can revoke or change someone's permission to view your calendar even after 30 days. (True or False?)
83. In order to access a shared calendar in Outlook, you need:
- A. Permission from the owner of the calendar.
 - B. Permission from your Internet Service Provider.
 - C. At least 15 gigabytes of free space on your computer.
 - D. To share your own calendar first
84. Schedule view displays multiple calendars side-by-side. (True or False?)
85. You cannot invite multiple people to a meeting. (True or False?)
86. Which of the following is NOT a valid response to a meeting request?
- A. Accept
 - B. Ignore
 - C. Propose New Time
 - D. Tentative
87. You cannot add a calendar to a pre-existing calendar group. (True or False?)
88. A _____ icon indicates a private appointment.
- A. calendar
 - B. lock
 - C. clock
 - D. envelope
89. You need a Microsoft Windows Live ID to publish your calendar on Office.com. (True or False?)
90. You need Microsoft Exchange Server to publish your calendar on Office.com. (True or False?)
91. When you share a folder with someone, they are able to:

- A. Read the folder's contents.
 - B. Make changes to the folder's contents.
 - C. Delete the folder's contents.
 - D. Read, delete, and make changes to the folder's contents.
92. You can use a delegate to send e-mail from your own e-mail address. (True or False?)
93. When entering custom responses, they must be separated by
- A. a single space.
 - B. a colon.
 - C. a semicolon.
 - D. a backslash.
94. Which of the following is NOT available when you track votes?
- A. The addresses of the people who responded.
 - B. The number of messages a person has responded to.
 - C. The time and date of a response.
 - D. The response itself.
95. Public folders can be accessed by anyone at any time. (True or False?)
96. At what point will other people be able to see your reply to a post?
- A. After you click Post Reply.
 - B. After you click the Post Reply button, compose a message, then click Post.
 - C. After you click the Post Reply button, compose a message, click Post, then click Make Message Viewable to Others.
 - D. Replies are private, and cannot be viewed by other people.

Quiz Answers

81. C. When you click the Share Calendar button, a sharing invitation appears for you to fill out.
82. True. You can revoke or change someone's permission to view your calendar at any time.
83. A. In order to access a shared calendar in Outlook you need permission from the owner of the calendar
84. False. Schedule view displays multiple calendars stacked on top of one another.
85. False. Of course you can invite multiple people to a meeting.
86. B. *Ignore* is not a valid response to a meeting request.
87. False. You can add a calendar to a calendar group at any time.
88. B. A lock icon indicates a private appointment.
89. True. You need a Microsoft Windows Live ID to publish your calendar on Office.com.

90. False. You can publish your calendar on Office.com without Microsoft Exchange Server.
91. A. When you share a folder with someone, they are able to read the folder's contents.
92. True. You can use a delegate to send e-mail from your own e-mail address.
93. C. When entering custom responses, they must be separated by a semicolon.
94. B. When you track votes, you can see the addresses of the people who responded, the time and date of a response, and the response itself.
95. False. Public folders can be accessed by anyone on your Microsoft Exchange server, provided they have permission to view them.
96. B. Other people will be able to see your reply to a post after you click the Post Reply button, compose a message, then click Post.

Working with Tasks

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Even if you're not an organized person, you've probably scrawled a to-do list on a piece of paper to help you remember everything that you have to do. The problem with paper to-do lists is that they're easy to misplace and often not in front of you when you need them.

You can throw away your paper to-do lists, because Outlook's To-Do List is difficult to misplace (when was last time you couldn't find your computer?) and is always right in front of you.

Creating tasks and to-do items in Outlook is almost easier than writing them on paper. In this chapter, you will learn skills like how to create a task or to-do item, view them in different ways, mark a task as complete once it's finished, assign and forward tasks. You will also learn how to create a recurring task that appears at a specified interval, such as a reminder to get a weekly report in to your boss.

Adding a Task

Recording your tasks makes them easier to remember and manage. Outlook tasks provide a great way to organize what you need to get done.

In Outlook, you can create a task item that you can track until completion, or you can create a to-do item. A to-do item is an e-mail message or contact that has been flagged for follow-up. All these items appear in the To-Do List. In this lesson, we'll look at how to add a task or create a to-do item from a message or contact.

Add a task

1. Click the **Tasks** button in the Navigation Pane.

The To-Do List appears in Tasks.

Tip: To view a list of tasks only—instead of all to-do items—select the **Tasks** folder in the My Tasks area of the Navigation Pane. The Tasks list appears.

2. Click the **Home** tab on the Ribbon and click the **New Task** button in the New group.

A Task item window appears.

3. Enter a subject and other information about the task.

The table to the right provides an overview of the fields available in the task item window.

You can add detail about the task in the text area.

4. Enter task details in the text area.

Tip: Click the **Details** button in the Show group on the Ribbon to access the Details page. Here you can enter secondary information about the task.

5. Click the **Task** tab on the Ribbon and click the **Save & Close** button in the Actions group.

The task is added to your list.

Other Ways to Add a Task:

Double-click in an open area of the Tasks list or the To-Do List to display a Task item window. Or, click in the **Click here to add a new Task** text box in the Tasks list or the To-Do List and type a subject for the task. Or, double-click in the Tasks area of the Calendar. Or, click in the **Type a new task** box in the To-Do Bar and enter a task subject.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Add a new task with the subject “New Marketing Plan”. Enter today as the start date and make the due date a week later. Select In Progress as the status and enter this description in the text area: “Develop guidelines for first phase of new marketing plan.”

Select an e-mail in your Inbox and flag it for follow-up.

View the new task and the flagged e-mail in the To-Do List.



Figure 8-1: A new Task item window.

Table 8-1: Task Item Window Fields

Start date	Specifies the date when the task will appear in the Tasks list as a reminder.
Due date	Specifies the when the task must be completed.
Status	Specifies the status of the task: Not Started, In Progress, Completed, Waiting on Someone else, or Deferred.
Priority	Specifies the importance level of the task: Low, Normal, or High.
% Complete	Specifies the percentage of the task that is finished.
Reminder	Displays a reminder for the item.
Owner	Specifies the name of the person who created the task. If the task is sent to another person, that person becomes the owner of the task.

Create a to-do item

A to-do item is any Outlook item, such as a task, e-mail, or contact, that has been flagged for follow-up. Tasks are automatically flagged as to-do items when you create them, while you must flag e-mails and contacts yourself.

- Right-click an e-mail message or contact, point to **Follow-up**, and select a follow-up flag.

The item is marked for follow-up, as shown in the example to the right, and will appear in Tasks, as shown in the example below.

You can select follow-up flags of varying time periods, such as Today, Tomorrow, or This Week.

Other Ways to Create a To-Do Item:

In the Inbox, click an e-mail's flag icon. Or, add a task (a task is automatically flagged as a to-do item).

Tips

- Flagging an e-mail message or contact creates a to-do item, but doesn't create a new task. Because the to-do item is still an e-mail message or contact after being flagged, you can't assign it as a task to someone else or track its progress or percentage of completeness.

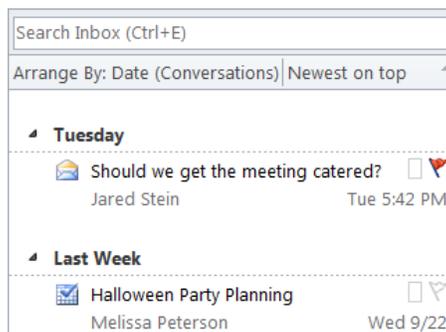


Figure 8-2: An e-mail message flagged for follow-up.

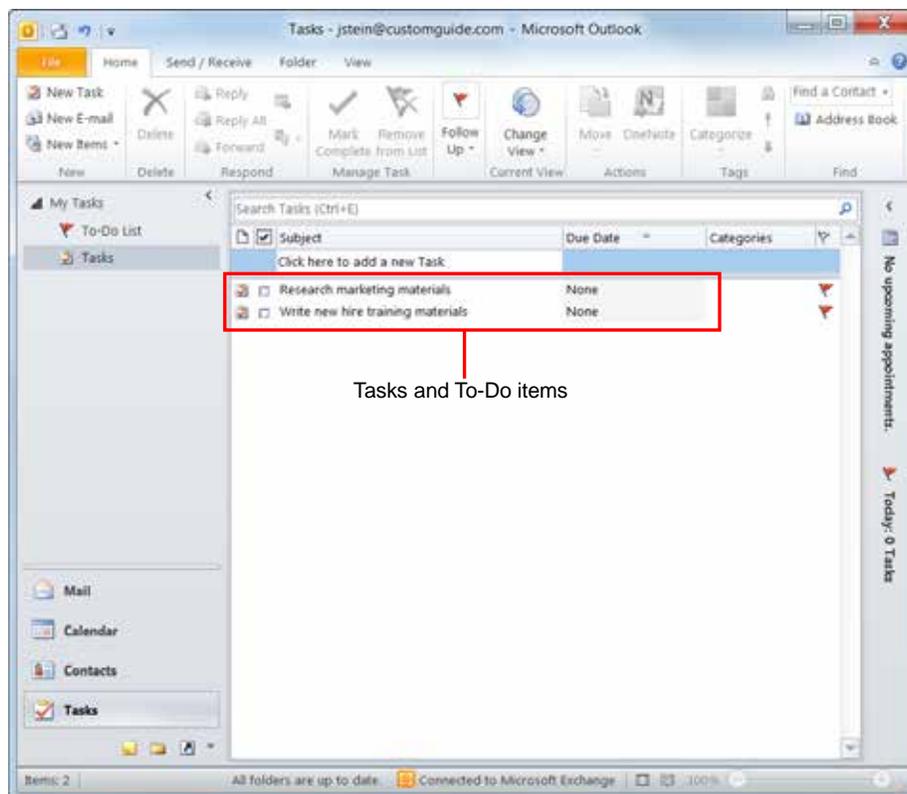


Figure 8-3: The To-Do List in Tasks.

Changing Task Views

In Outlook 2010 you can view tasks and to-do items in several different places: in Tasks (using the To-Do List or Tasks list), in the To-Do Bar, and in the Daily Task List in Calendar.

View tasks in Tasks

The main place to keep track of tasks and to-do items is in the Tasks area.

1. Click the **Tasks** button in the Navigation Pane.

The To-Do List appears in Tasks. Here you can see all your tasks and flagged to-do items.

Tip: When you first open Tasks, the To-Do List appears, showing all your tasks and to-do items, such as e-mails flagged for follow-up. To display task items only—without e-mails or contacts marked for follow-up—select the **Tasks** folder in the My Tasks area of the Navigation Pane. This makes the Tasks list appear.

You can see the To-Do List or Tasks list using several different views.

2. Click the **Home** tab on the Ribbon and click the **Change View** button in the Current View group.

The table to the right, *Current View Options in Tasks*, provides an overview of the views available in Tasks.

Other Ways to Change Views:
Click the **View** tab on the Ribbon and click the **Change View** button in the Current View group.

3. Select the view you want to use.

The To-Do List or Tasks list appears in the desired view.

4. Double-click a task to view it.

Tips

- In Tasks, you can use the Instant Search feature to find tasks and to-do items. Simply enter search keywords in the Search Tasks box at the top of the Tasks list screen or in the Search To-Do List box at the top of the To-Do List screen.

& Exercise

- **Exercise File:** None required.
- **Exercise:** View tasks in the To-Do List and the Tasks list in Tasks.
View tasks in the expanded (Normal) To-Do Bar.
View tasks in the Calendar.

Table 8-2: Current View Options in Tasks

Detailed	Displays many details about each task, including color category and percentage complete.
Simple List	Displays a few details so you can see your tasks at a quick glance. The In Folder column tells you whether the to-do item is a flagged e-mail item or a task.
To-Do List	Displays all tasks and to-do items with very little detail. Also displays Reading Pane.
Prioritized	Displays all tasks in order of priority in a list
Active	Displays tasks that are incomplete (including overdue ones) in a list.
Completed	Lists all tasks that have been marked complete.
Today	Displays a list of all tasks due today.
Next 7 Days	Displays tasks that are due in the next seven days in a list.
Overdue	Displays tasks that are overdue in a list.
Assigned	Shows only the tasks that have been assigned to others, sorted by the task owner's name and due date.
Server Tasks	Displays a lists of tasks stored on the server.

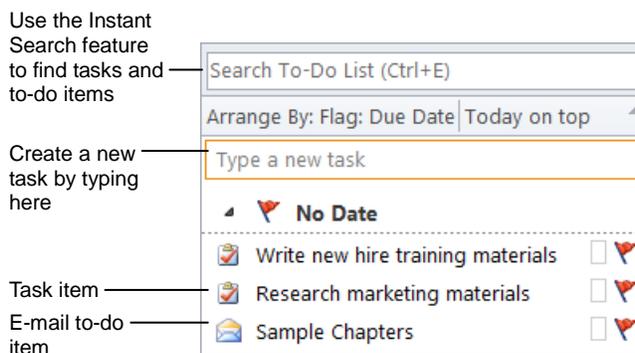


Figure 8-4: The To-Do List in Simple List view.

View tasks in the To-Do Bar

You can also keep tabs on your tasks and to-do items using the To-Do Bar.

✓ Tips

ü The To-Do bar should appear by default in minimized form in Tasks. If you don't see it, click the **View** tab on the Ribbon, click the **To Do Bar** button in the Layout group, and select **Normal** from the list.

1. If necessary, click the **Expand the To-Do Bar** button, located at the top of the To-Do Bar.

The expanded To-Do Bar appears on the right side of the screen. At the bottom of the To-Do Bar, below the calendar and appointments, you can see all your tasks and flagged to-do items.

✓ **Tip:** To minimize the To-Do Bar, click the **Minimize the To-Do Bar** button. To hide it, click the **View** tab on the Ribbon, click the **To Do Bar** button in the Layout group, and select **Off** from the list.

2. Double-click a task to view it.

View tasks in Calendar

You can also access your tasks in the Daily Task List in Calendar.

1. Click the **Calendar** button in the Navigation Pane.

The Calendar appears. In Day and Week views, you can see a Tasks area beneath the calendar. Here you can view and work with tasks and to-do items.

2. Double-click a task to view it.

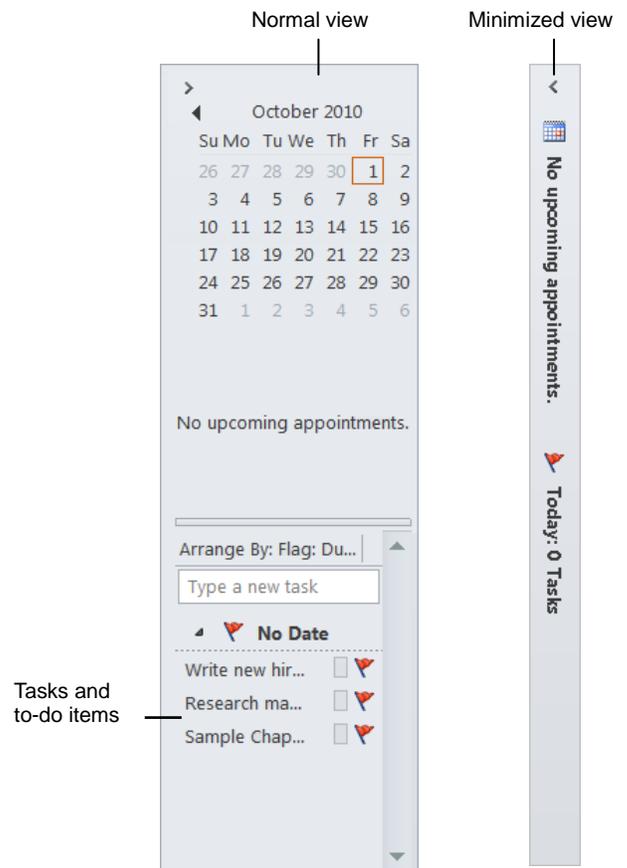


Figure 8-5: The To-Do Bar in Minimized and Normal views.



Tasks and to-do items. Tasks can only be viewed in Day, Work Week, or Week views.

Figure 8-6: Viewing Tasks in Calendar.

Sorting Tasks

Figuring out where to start on your task list can be difficult. Use Outlook's sorting options to put your list in order. You'll soon be on your way to completing your to-do list!

1. Click the **Tasks** button in the Navigation Pane.
The To-Do List appears in Tasks. Here you can see all your tasks and flagged to-do items.
2. Click the **View** tab on the Ribbon.
There are several options to arrange your tasks. See the *Arrangement Options* table below for more information on each arrangement.
3. Select an arrangement from the Arrangement group.
The arrangement is applied.

Table 8-3: Arrangement Options

Categories	Arranges tasks by assigned categories.
Start Date	Arranges tasks by the date which they were to have been started.
Due Date	Arranges tasks by the date which they are due.
Folder	Arranges tasks by the folder in which they are stored.
Type	Arranges tasks by type.
Importance	Arranges tasks by priority.
Assignment	Arranges tasks by assignment.
Modified Date	Arranges tasks by the date which the task was last edited.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Arrange tasks by Due Date.

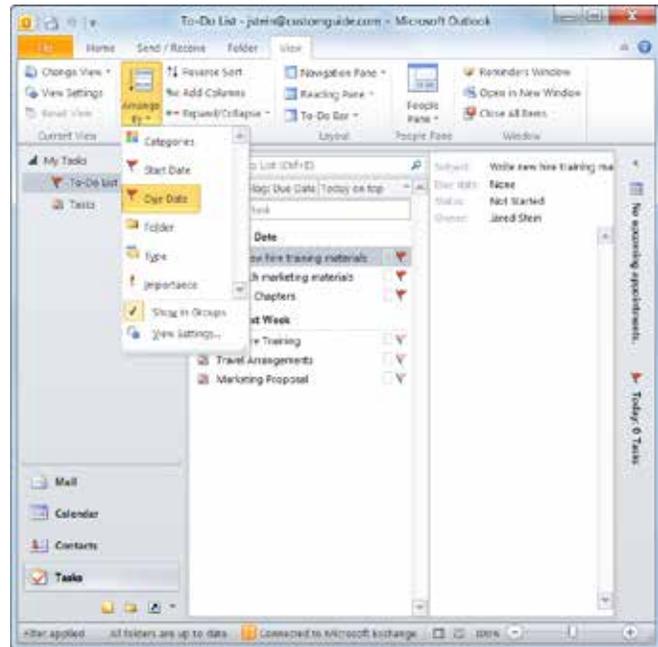


Figure 8-7: Use the arrangement options to sort your tasks.

Updating a Task

Once you've created a task, you can edit or update it to show your progress. You can even send a status report to others.

Update a task

1. Click the **Tasks** button in the Navigation Pane.

The To-Do List appears.

2. Double-click the task that you want to update.

Here in the Task item window you can make changes to the task. You can do things like change the start or due date, select a new status or priority, or update the % Complete.

3. Enter updated percentage of completion information, or other information, as desired.

Tip: Remember, you can only enter start and completion dates and percentage of completion information in Task items—not in e-mail messages or contacts flagged as to-do items.

4. Click the **Task** tab on the Ribbon and click the **Save & Close** button in the Actions group.

The task is updated.

Send a status report

You can send an e-mail to inform someone else of the progress you're making on a task.

1. Click the **Tasks** button in the Navigation Pane.

The To-Do List appears.

2. Double-click the task you want to work with.

The Task item window appears.

3. Click the **Task** tab on the Ribbon and click the **Send Status Report** button in the Manage Task group.

An e-mail message containing a report about the task item appears. It includes the start and due dates, current status, % Complete, the Date completed (if it has been completed), and the number of hours spent on the task.

4. Enter a recipient in the To box, type a message, and click the **Send** button.

The message is sent.

& Exercise

- **Exercise File:** Create a task with the subject "New Marketing Plan" if one was not previously created. Enter today as the start date and make the due date a week later. Select In Progress as the status and enter this description in the text area: "Develop guidelines for first phase of new marketing plan."
- **Exercise:** Open the New Marketing Plan task. Change the Status to "Waiting on someone else".
E-mail yourself a status report about the task.

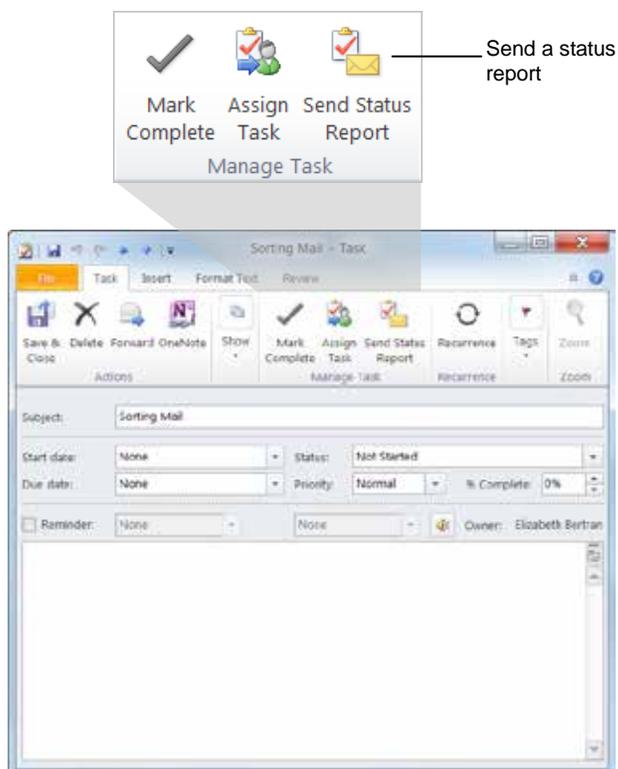


Figure 8-8: Updating a task in the Task's item window.

Creating a Recurring Task

If you have a task that you do on a regular basis you can create a recurring task that automatically repeats.

1. Click the **Tasks** button in the Navigation Pane.
2. Click the **Home** tab on the Ribbon and click the **New Task** button in the New group.

A Task item window appears.

3. Enter the task information.
4. Click the **Task** tab on the Ribbon and click the **Recurrence** button in the Recurrence group.

The Task Recurrence dialog box appears.

In the “Recurrence pattern” area, you tell Outlook when and how often the task recurs. You have several choices here:

- **Daily:** Tasks that recur every day or every work day.
- **Weekly:** Tasks that recur on the same day(s) of the week, such as a report due every Friday or a payroll due every other Thursday.
- **Monthly:** Tasks that recur on every month, such as an inventory audit that occurs on the 5th of every month
- **Yearly:** Tasks that recur annually, such as tax filing days.

5. Select a recurrence pattern.

The options to the right will change based on whether you selected Daily, Weekly, Monthly, or Yearly.

6. Select additional recurrence options from the options that appear, then set the start and end date in the “Range of recurrence” area.

7. Click **OK**.

✓ Tips

- ü To stop the task from recurring, open the task, click the **Recurrence** button in the Recurrence group on the Ribbon, and select **Remove Recurrence**.
- ü To skip just the current occurrence of a recurring task, open the task and click the **Skip Recurrence** button in the Recurrence group on the Ribbon.
- ü If you set a reminder for a recurring task, you will be reminded again every time the task recurs.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Create a new task with “Write newsletter” as the subject and set it to recur every second Friday of the month. You can leave the Range of recurrence settings alone.

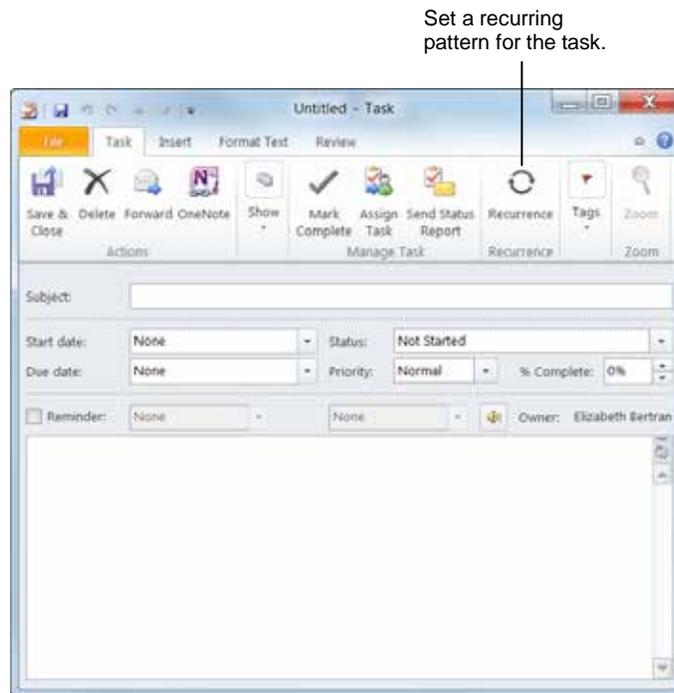


Figure 8-9: Setting up a task to recur.

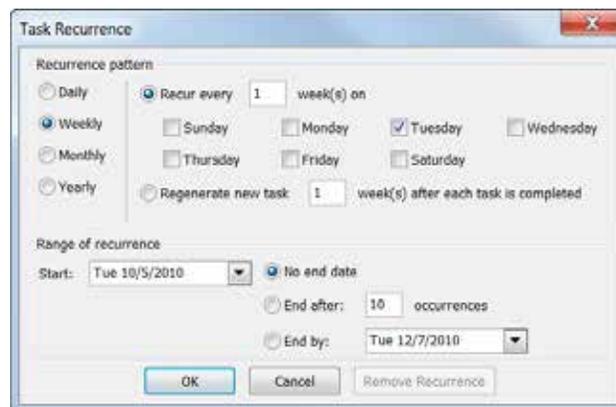


Figure 8-10: The Task Recurrence dialog box.

Attaching an Item to a Task

You can attach an Outlook item—such as an e-mail or contact—or another file to a task in Outlook.

Attach an Outlook item

1. Open a task item.
The Task item window appears.
2. Click the **Insert** tab on the Ribbon.
The Insert tab commands appear.
3. Click the **Outlook Item** button in the Include group.
The Insert Item dialog box appears. Here you can browse for items in all Outlook folders. You can attach mail messages, contacts, calendar items, or even other task items.
4. Select a folder in the Look in list, then select an item from that folder in the Items: list.
You can also select whether you want to insert the item as an attachment or text only.
5. Select an “Insert as” option and click **OK**.
The item is inserted into the task item.
 - ✓ **Tip:** You can also attach an electronic business card to the task. In the Task item window, click the **Business Card** button in the Include group on the Ribbon and select someone’s business card.
6. Click the **Task** tab on the Ribbon and click the **Save & Close** button in the Actions group.
The task is saved with the item attached.

Attach a file

You can also attach other types of files to a task.

1. Open a task item.
The Task item window appears.
2. Click the **Insert** tab on the Ribbon.
The Insert tab commands appear.
3. Click the **Attach File** button in the Include group.
The Insert File dialog box appears.

& Exercise

- **Exercise File:** Marketing Plan.docx and a task with the subject “New Marketing Plan”.
- **Exercise:** Send yourself an e-mail with the subject “Plan update”.

Attach the “Plan update” e-mail to the New Marketing Plan task. Then attach the Marketing Plan.docx file to the task.

Attach a file Attach an Outlook item



Figure 8-11: A new Task item window with the Insert tab displayed.

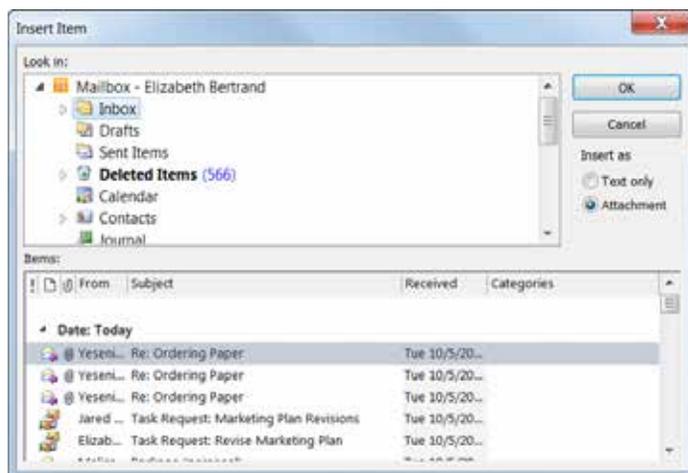


Figure 8-12: The Insert Item dialog box.

4. Browse to the file you want to attach and select it.
5. Click the **Insert** button.
The file is attached to the task.
6. Click the **Task** tab on the Ribbon and click the **Save & Close** button in the Actions group.
The task is saved with the file attached.

Assigning a Task

Besides creating tasks for yourself, you can assign a task to someone else. A task request is sent by e-mail, and the recipient can accept or decline it.

Assign a task

1. Click the **Tasks** button in the Navigation Pane.
The To-Do list appears.
2. Click the **Home** tab on the Ribbon and click the **New Items** button list arrow in the New group.
A list of options appears.
3. Select **Task Request**.
A Task window appears.
4. Enter the desired task information.
Be sure you enter at least the assignee's e-mail address in the To box and a description of the task in the Subject box.
5. Make sure the **Keep an updated copy of this task on my task list** and **Send me a status report when this task is complete** check boxes are selected.
Outlook will display the assigned task on your own task list so you can keep tabs on it, and you will be notified when the task is completed.
6. When you are finished entering task information, click the **Send** button.
The task is sent, and a copy appears in your Sent Items folder.

✓ Tips

- You can also pass along a task that you've previously created or been assigned. Open the task and click the **Assign Task** button in the Manage Task group on the Ribbon. Enter the new assignee's e-mail address and send.

Accept or decline an assigned task

If you receive a task request, you need to accept or decline the task.

1. Click the **Mail** button in the Navigation Pane.
The Inbox appears. Task requests are indicated by an  icon.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Create a new task request with the subject "This is a test" and send it to a coworker (make sure you keep a copy in your task list).
Forward that task to yourself.

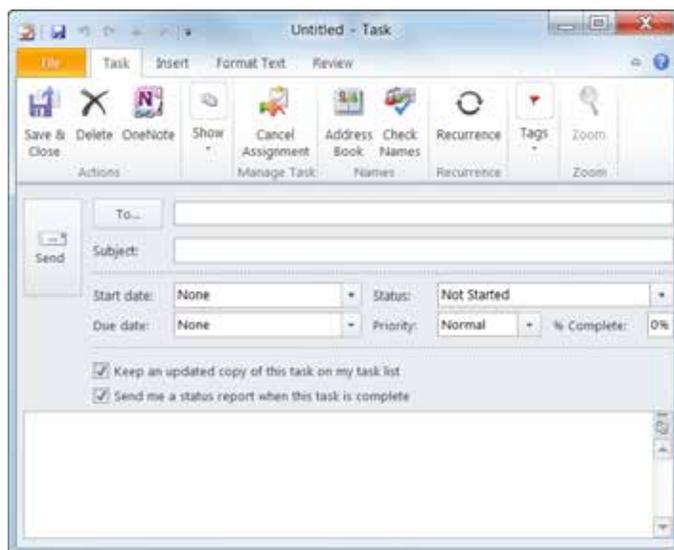


Figure 8-13: Assigning a task using a task request.

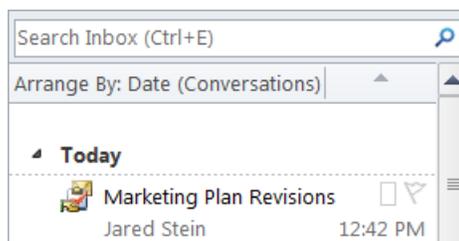


Figure 8-14: A task request in the Inbox.

2. Double-click the task request.

The message window opens.

🔴 Other Ways to Accept or Decline a Task:

If the Reading Pane is displayed, you can select the message in the Inbox and then click **Accept** or **Decline** in the Reading Pane.

3. Click the **Task** tab on the Ribbon and click **Accept** or **Decline** in the Respond group.

A message appears, asking if you want to edit the response that will be sent to the person who assigned you the task.

4. Select how you would like to respond to the task request and click **OK**.

If you accept a task, it is moved to your Tasks folder. If you decline a task, it is moved to your Deleted Items folder. Either way, an e-mail is sent to the person who assigned the task informing him or her of your action.

✔ Tips

- ☐ Once you mark the task's status as Complete, an e-mail will be sent to the person who assigned the task, notifying him or her of the task's completion.

Forward a task

If you just want to send a copy of a task to someone without assigning it to that person, you can forward the task.

1. Click the **Tasks** button in the Navigation Pane.

The To-Do List appears.

2. Right-click the task you want to forward and select **Forward** from the contextual menu.

An e-mail message appears with the task included as an e-mail attachment

3. Enter the e-mail address of the person you want to send the task to and click the **Send** button.

The task is sent.

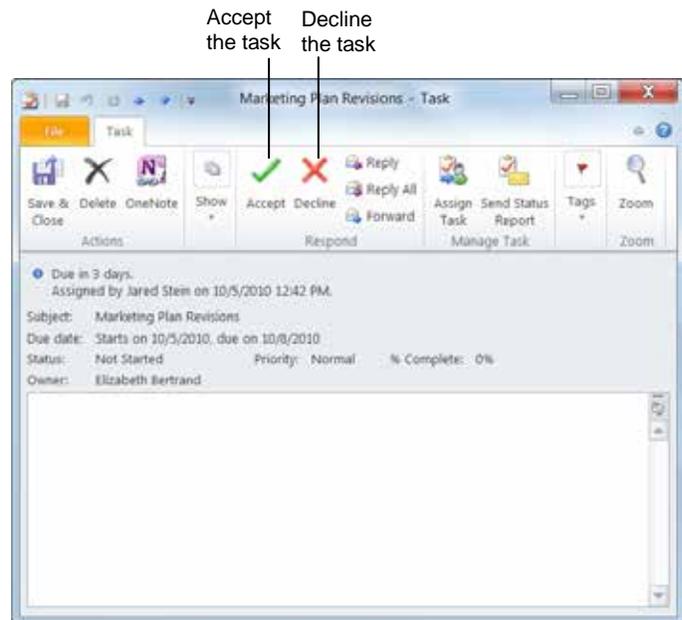


Figure 8-15: Accepting or declining a task request.

Printing Tasks

You can print a list of your tasks or just individual tasks.

Print a task list

1. Click the **Tasks** button in the Navigation Pane.
Whichever list is visible will be the one that is printed. If you want only tasks to be printed, make sure the Tasks list is displayed. If you'd rather print all your to-do items, make sure the To-Do List is displayed.
2. Click the **File** tab on the Ribbon and select **Print**.
Options for printing your Tasks appear.

✔ **Tip:** To print selected tasks from the list, press and hold the **<Ctrl>** key while you select the items you want to print.

🔗 **Other Ways to Print:**
Press **<Ctrl> + <P>**.

3. Click the **Print** button.
The list prints.
- ✔ **Tip:** Only Table Style is available for printing tasks. The exceptions are the Active and Assigned views, which also have Memo Style.
- ✔ **Tip:** You can select additional printing options in the Print dialog box. Click the **Print Options** button to open the Print dialog box.

Print a task item

1. Click the **Tasks** button in the Navigation Pane.
The To-Do List appears.
2. Double-click the task you want to print.
The Task item window appears.
3. Click the **File** tab on the Ribbon and select **Print**.
Options for printing your Tasks appear.
- 🔗 **Other Ways to Print:**
Press **<Ctrl> + <P>**.
4. Click the **Print** button.
The task prints.
- ✔ **Tip:** You can select additional printing options in the Print dialog box. Click the **Print Options** button to open the Print dialog box.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Print your entire To-Do List.
Open one task of your choice and print it.

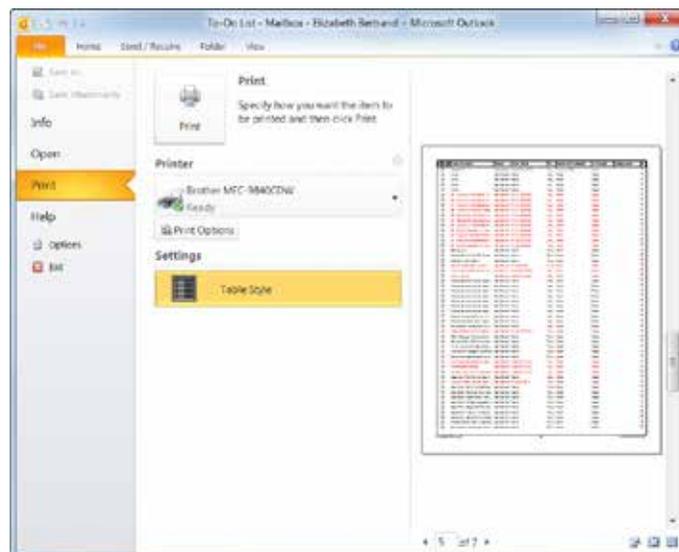


Figure 8-16: Click the File tab on the Ribbon and select Print to preview and print tasks.

Completing a Task

Whether you've completed a task, given up on it, or are otherwise through with it, at some point you're going to want to clear some tasks off your list. In this lesson, we'll look at how to go about completing, clearing, and deleting tasks.

Mark as complete

You can mark tasks and to-do items as complete once you're done with them.

1. Click the **Tasks** button in the Navigation Pane.

The To-Do List appears.

Tip: To make it easy to mark a task as complete in the To-Do List, click the **Home** tab on the Ribbon, click the **Change View** button in the Current View group, and select **Simple List**.

2. In Simple List view, click the **Complete** check box next to the completed task.

The task appears with a line through it to let you know it is complete.

Other Ways to Mark a Task as Complete: Right-click a task anywhere it's displayed and select **Mark Complete** from the contextual menu. Or, click the item's **flag**. Or, open the task's item window, click the **Status** list arrow, and select **Completed** or enter 100% in the % Complete box.

Clear a follow-up flag

You can remove to-do items that are not tasks—such as e-mail messages marked with a flag for follow-up—from the To-Do List by clearing the item's flag.

- Right-click the to-do item and select **Follow Up** > **Clear Flag** from the contextual menu.

The item is no longer flagged and is not included on To-Do List.

Tips

- You can clear a to-do item's follow-up flag anywhere it is displayed—in the To-Do List, To-Do Bar, Calendar, or even in the Inbox if it is an e-mail.
- What's the difference between clearing a flag and marking it as complete? Marking a to-do item as complete is better for your records because it still appears in the to-do list. By clearing a flag, it's as though the item was never flagged, which may cause confusion in the future.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Create a new task with the subject "Quick Project", then mark it as complete in the To-Do List.

Send yourself an e-mail with the subject "Flagged" and flag it for follow-up in the Inbox. Then go into Tasks and clear the flag on the "Flagged" to-do item.

Mark a task as complete.

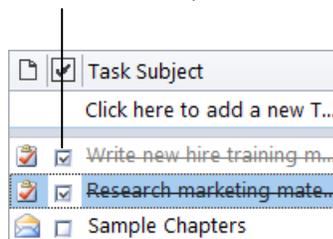


Figure 8-17: Marking a task as complete in the To-Do List in Simple List view.

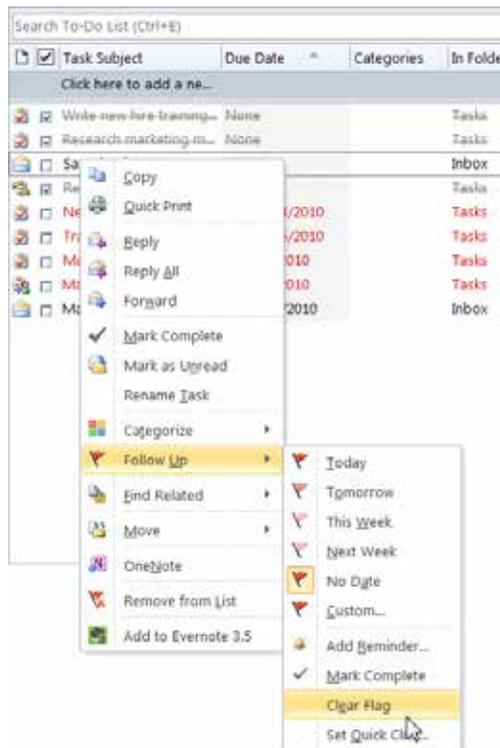


Figure 8-18: Clearing a follow-up flag from an e-mail to-do item.

Delete a task

You can also delete a task whether it's completed or not.

1. Select the task.

You can select the task in the To-Do List, Task list, To-Do Bar, or Calendar.

2. Click the **Home** tab on the Ribbon and click the **Delete** button in the Delete group.

The task is deleted.

 **Other Ways to Delete a Task:**

Select the task and press <**Delete**>.

-  **Trap:** If you try to delete an e-mail that has been flagged as a to-do item, you will see a message warning you that the e-mail will also be deleted from the Inbox.

Working with Tasks Review

Quiz Questions

97. You can add a new task in all of the following places except the _____.
- A. To-Do Bar
 - B. To-Do List
 - C. Tasks list
 - D. New Task Pane
98. Which of the following types of items can be a to-do item?
- A. Contact item
 - B. E-mail message item
 - C. Task item
 - D. All of the above.
99. Which of the following is NOT a place you can view tasks in Outlook?
- A. Tasks
 - B. Calendar
 - C. To-Do dialog box
 - D. To-Do Bar
100. Which of the following is not an arrangement option for Tasks?
- A. Categories
 - B. Start Date
 - C. Creator
 - D. Type
101. Once you create a task, you cannot update it. (True or False?)
102. Which of the following is not a recurrence pattern option?
- A. Daily
 - B. Hourly
 - C. Weekly
 - D. Monthly
103. To attach an item or file to a task, use the commands on the _____ tab in the task's item window.
- A. Insert
 - B. Attach
 - C. Item
 - D. File
104. Assigning a task and forwarding a task are the same thing. (True or False?)
105. You can print a list of tasks, but not an individual task. (True or False?)

106. When you mark a task as Complete, a line appears through the task. (True or False?)

Quiz Answers

97. D. There isn't a New Task Pane, so you can't add a task there.
98. D. All of these items can be to-do items. Tasks are to-do items by default, while the others must be flagged for follow-up.
99. C. You can't view tasks in a To-Do dialog box
100. C. Creator is not an arrangement option for Tasks.
101. False. You can always update a task.
102. B. Hourly is not a recurrence option.
103. A. Use the commands on the Insert tab to attach an item or file to a task.
104. False. When you forward a task you are not assigning it.
105. False. You can print either a task list or an individual task.
106. True. When you mark a task as Complete, a line appears through the task.

Using the Journal and Notes

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You can use Outlook's Journal to keep a log of your important daily activities. Then, when you're famous, future historians and students will look back and read about your exciting daily activities at the office!

In a nutshell, there are two ways to track events in the Journal:

Manually: You can manually create a journal entry, just like you would create an e-mail or task. Manually created journal entries can be about any type of activity you can think of: phone calls, meetings, important conversations, faxes, etc.

Automatically: Outlook can automatically record certain activities and relate them to a particular contact. For example, you could configure the Journal to automatically track any e-mails sent to or received from Bob Smith.

You will learn how to create and work with journal entries using both of these methods in this chapter. You will also learn how to attach a file to a journal entry, how to use the Journal with the Contacts list to perform basic contact management, and how to display the Journal using the available preset views.

Displaying the Journal

The Journal is a tool for recording your actions. The Journal can track Outlook items like e-mail, Microsoft Office files like Word documents or Excel spreadsheets, and interactions outside your computer—such as phone calls and postal mail. You can even track your interactions with your contacts. Journal entries can be created either automatically or manually.

The Journal normally displays its information on a timeline. A timeline makes it easy to view the chronological order of your activities. For example, perhaps you can't find an Excel spreadsheet that you worked on last week. You could use Outlook's Journal to view everything you've worked on in Microsoft Excel during the past week to find the spreadsheet.

Add the Journal to the Navigation Pane

By default, the Journal button is not displayed in the Navigation Pane, so you need to add it.

- Click the **Configure buttons** button in the Navigation Pane and select **Add or Remove Buttons**  **Journal** from the list.

The Journal button appears at the bottom of the Navigation Pane.

Display the Journal

- Click the **Journal** button in the Navigation Pane.

 **Other Ways to Display the Journal:**
Press **<Ctrl> + <8>**.

A message appears, asking if you want to turn on the Journal's automatic tracking features. You can turn these on later if you decide to.

- Select the **Please do not show me this dialog again** check box and click **No**.

The Journal is displayed as a timeline. Use the scroll bars to navigate Journal.

Tips

- The Journal normally displays its information in a *grouped view*, meaning items are organized into groups that you can then expand or collapse to display or hide the items they contain. Use the  expand and  collapse buttons to expand or collapse the groups.

& Exercise

- Exercise File:** None required.
- Exercise:** Add the Journal to the Navigation Pane and display the Journal.

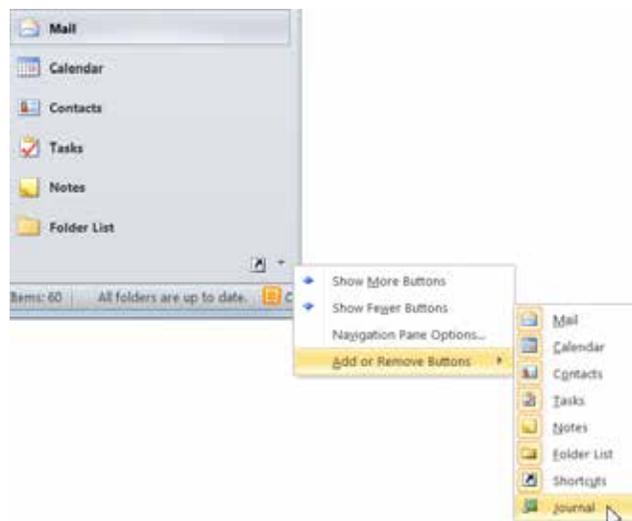
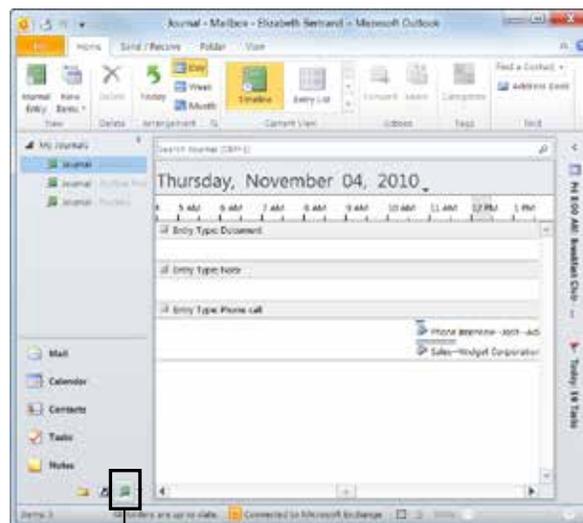


Figure 9-1: Adding the Journal to the Navigation Pane.



Journal button

Figure 9-2: The Journal displayed in Outlook.

Creating a Journal Entry Manually

In this lesson, we'll look at how to manually create an entry in the Journal. You can manually create journal entries to record your phone calls, meetings, and work on documents.

1. Click the **Journal** button in the Navigation Pane.

The Journal appears.

2. Click the **Home** tab on the Ribbon and click the **Journal Entry** button in the New group.

A new journal entry window appears.

Other Ways to Create a Journal Entry Manually:

In any Outlook module, click the **Home** tab on the Ribbon and click the **New Item** button in the New group. Select **More Items** and then select **Journal Entry**.

3. Enter the subject in the Subject box.

Next you need to select an entry type. You can choose from different Outlook items like a task or meeting, a Word document, or a phone call.

4. Click the **Entry type** list arrow and select an entry type.
5. Enter a start time and duration, descriptive text, and other information, as desired.
6. Select additional options in the Tags group on the Ribbon.

These options include:

- **Categorize:** Click the **Categorize** button to apply a color category to the journal entry.
- **Private:** Click the **Private** button to hide the details of the entry from others.

Once you've entered all the information you want, you can save and close the entry.

7. Click the **Save & Close** button in the Actions group on the Ribbon.

Other Ways to Create a Journal Entry:

Find the file on your computer that you want to record and drag the file to the Journal button in the Navigation Pane. Select the journal entry options you want to use.

& Exercise

- **Exercise File:** Marketing Plan.docx.
- **Exercise:** Create a new journal entry and enter "Marketing plan" in the Subject box. Select Microsoft Word as the entry type, select 4:00 PM as the start time, and make the Duration 30 minutes. Enter "Created rough draft of new marketing plan" in the text area.

Attach the Marketing Plan.docx file from your Practice folder.

Save and close the journal entry.

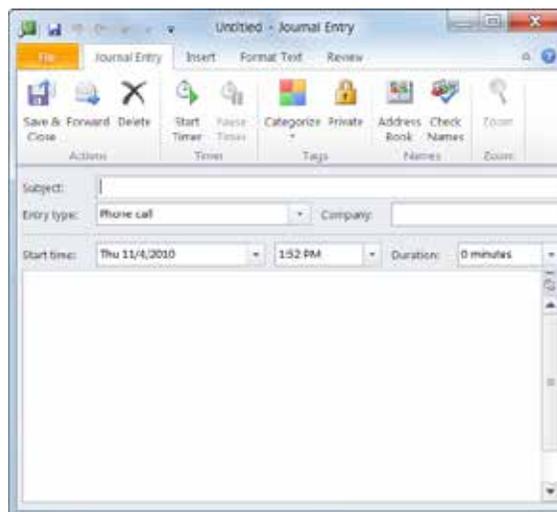


Figure 9-3: A new journal entry window.

Tips

- Ü To record the amount of time spent on an event, click the **Start Timer** button in the Timer group on the Ribbon, open a document associated with the entry, and when you're done working on the document, click **Pause Timer**. The Journal records the time you spent working on it.
- Ü Use the commands in the Include group on the Insert tab to attach files, Outlook items, or a business card to the journal entry.

Creating a Journal Entry Automatically

Another way to create a journal entry is to do nothing. That's right—Outlook's Journal can automatically record information about any file you create, edit, or print from any Office application. The Journal can also automatically track e-mail messages, meeting requests and responses, and task requests and responses to the contacts you specify.

Before you can use Outlook's automatic Journal recording features, you have to turn them on.

1. Click the **File** tab on the Ribbon and select **Options**.

The Outlook Options dialog box appears.

2. Click the **Notes and Journal** tab.

Options to change settings for Notes and the Journal appear.

3. Click the **Journal Options** button.

The Journal Options dialog box appears. Here you can select the types of Outlook items and Office files you want to track automatically.

First you need to select the types of Outlook items—such as e-mail messages, meeting requests, etc.—that you want to track.

4. Select the types of Outlook items you want to record in the “Automatically record these items” list.

Now, select the contacts for whom you want to record these items.

5. Select the desired contacts in the “For these contacts” list.

Next, select which types of Office files you want to track.

6. Select file types in the “Also record files from” list.

Tip: In the Journal Options dialog box, you can also indicate what you want to happen when you double-click a journal entry: Open the journal entry or Open the item referred to by the journal entry. Select the option you prefer.

7. Click **OK**, then click **OK** again.

The Journal Options dialog box closes, followed by the Options dialog box.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Set up the Journal to automatically record e-mails associated with one of your coworkers.

Also set up the Journal to record your work on Microsoft Word files.

Click here to view the Journal Options dialog box, where you can turn on automatic journal entries.

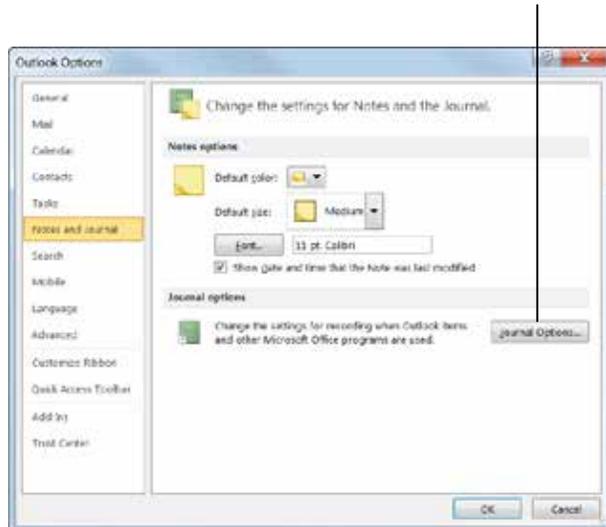


Figure 9-4: The Outlook Options dialog box.

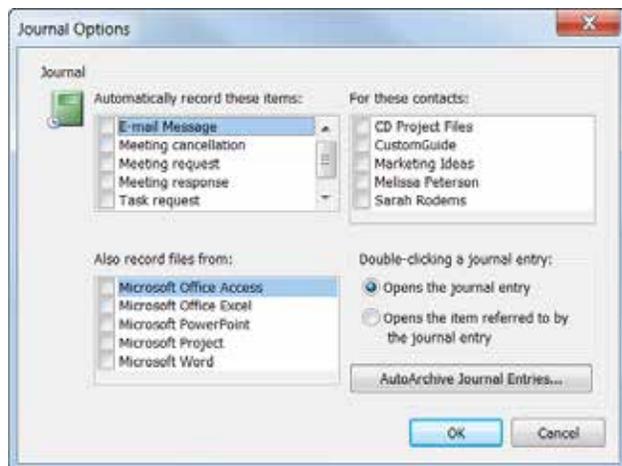


Figure 9-5: The Journal Options dialog box.

Tips

- Ü Although Outlook's Journal can automatically record almost everything you do on your computer, many people decide not to use the automatic recording features. Why? Privacy. Many people find the idea of Outlook keeping track of everything they work on—including personal letters—a little disturbing. If other people occasionally use your computer, you may want to think twice before enabling all of the Journal's automatic recording features.

Relating a Journal Entry to a Contact

When you set up automatic journal entries, not only can you select which contacts you want to track items for, but you can also manually relate a contact to a journal entry.

Create a journal entry related to a Contact

When you create a journal entry, such as for a phone call, you can choose to relate it to a particular contact.

1. Click the **Journal** button in the Navigation Pane.
The Journal appears.
2. Click the **Home** tab on the Ribbon and click the **Journal Entry** button in the New group.
A new journal entry window appears.
3. Enter the subject in the Subject box, select an Entry type, and enter any other desired information.

Now you're ready to relate the entry to a contact.

4. Click the **Address Book** button in the Names group on the Ribbon.
The Select Contacts dialog box appears.
5. Select a contact from the list at the bottom of the dialog box. Click **OK**.

The Select Contacts dialog box closes. In the journal entry window you won't see any sign of the fact that you just associated the entry with the contact.

6. Click the **Save & Close** button in the Actions group on the Ribbon.

Other Ways to Relate a Journal Entry to a Contact:

Set up the Journal to automatically record items related to a particular contact using the Journal Options dialog box.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Create a new manual journal entry with this information:
Subject: Marketing update call Entry type: Phone call
Start time: 10:00 AM Duration: 5 minutes

Associate the journal entry with one of your contacts.

Open the contact, show Activities, and view the journal entry.

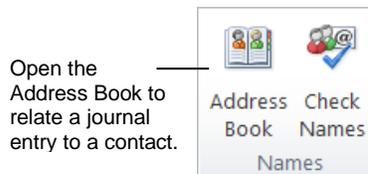


Figure 9-6: The Names group on the Journal Entry tab of the Ribbon.

Select a name to associate with the journal entry.

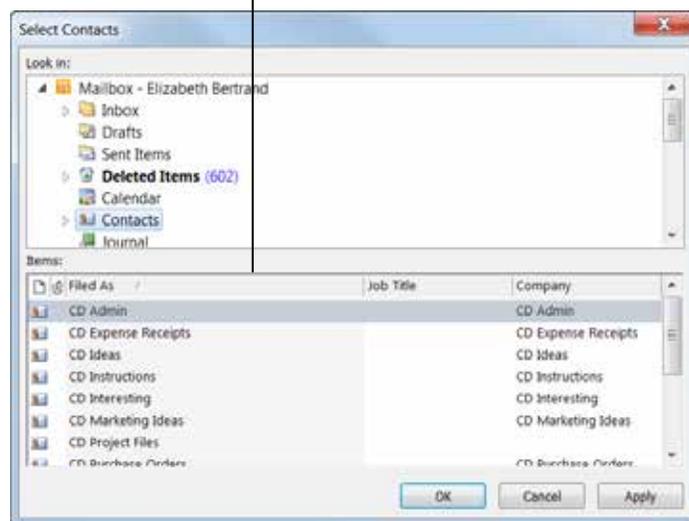


Figure 9-7: The Select Contacts dialog box.

View journal entries related to a contact

Once you associate a journal entry with a contact, either manually or automatically, you can go into Contacts to see the relationship.

1. Click the **Contacts** button in the Navigation Pane.

The Contacts list appears.

2. Double-click a contact that you have related to a journal entry.

The contact's item window appears.

3. Click the **Contact** tab on the Ribbon and click the **Activities** button in the Show group.

Here you will see the related journal entry in the list of activities. You will also see e-mails and appointments related to the contact listed here.

You can filter out the other types of items and view only the journal items.

4. Click the **Show** list arrow and select **Journal**.

Only journal items appear in the list of activities.

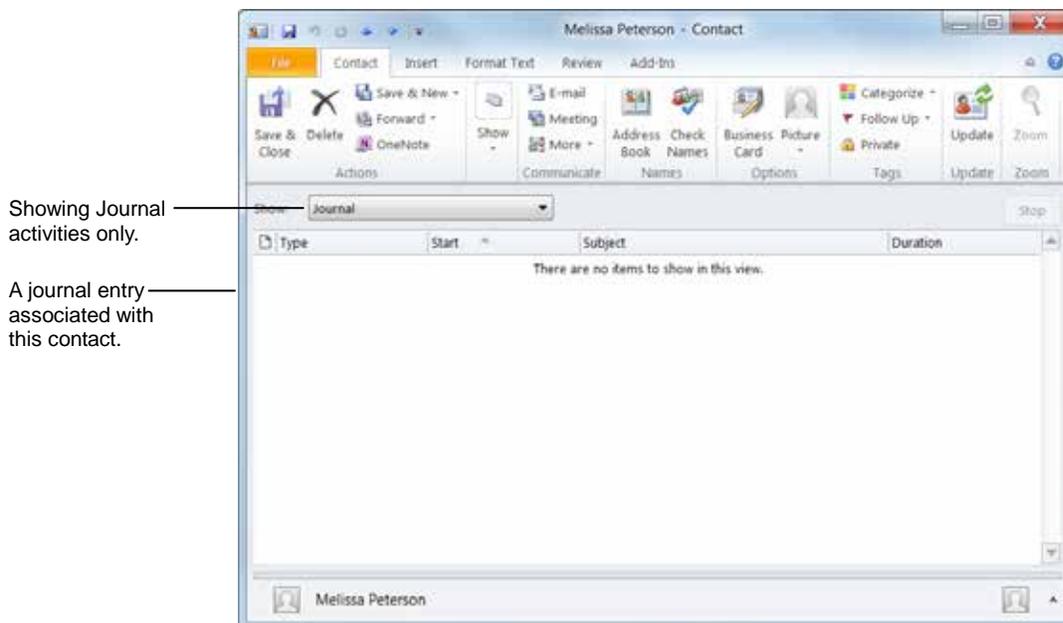


Figure 9-8: A Contact window displaying the Activities page and showing Journal entries only.

Opening, Modifying, and Deleting a Journal Entry

Journal entries are easy to open, modify, move, or delete.

Go to Date

The Go to Date feature allows you to select the day you want to display in the Journal. It is particularly useful if your Journal contains hundreds of items over a long period of time.

1. Click the **Journal** button in the Navigation Pane.
The Journal appears.
2. Click the **Home** tab on the Ribbon and click the **dialog box launcher** in the Arrangement group.
The Go To Date dialog box appears.
3. Click the **Date** list arrow and select the date you want to go to from the calendar.
4. Click **OK**.
The date you selected is displayed in the Journal.

Open and modify a journal entry

When you modify a journal entry, its associated item or document is not affected. Likewise, when you modify an item or document, related journal entries are unaffected.

1. Click the **Journal** button in the Navigation Pane.
The Journal appears. You may need to scroll down to view all your entries for a particular day.
2. Double-click the journal entry you want to open.
The journal entry window appears. Here you can modify the entry any way you want.
3. Make changes to the journal entry. Click **Save & Close** when you're finished.
The entry is updated accordingly.

Delete a journal entry

- Select the journal entry you want to delete, click the **Home** tab on the Ribbon, and click the **Delete** button in the Delete group.
The entry is deleted.
-  **Other Ways to Delete a Journal Entry:**
Select the journal entry and press **<Delete>**.

& Exercise

- **Exercise File:** A journal entry.
- **Exercise:** Open a journal entry and make a change to the entry's subject text. Save and close the entry.
Delete the journal entry.

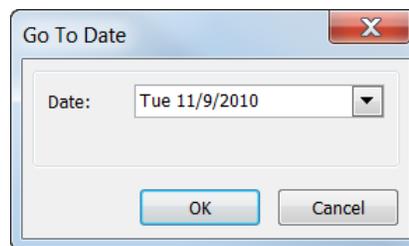


Figure 9-9: The Go To Date dialog box.

Changing Journal Views

Like many other Outlook tools, there are several ways to view your Journal. You can also select the time period you want to view—day, week, or month.

So which view is the best? That depends on the situation and your own personal preference. Maybe you want to view only those activities that have occurred during the past week, or maybe you want to see a list of phone call-type journal entries. Let's look at the different views.

Change time scale

One way you can change what the Journal displays is by changing which dates are displayed.

1. Click the **Journal** button in the Navigation Pane. The Journal appears.
2. Click the **Home** tab on the Ribbon and click the time scale button you want to use in the Arrangement group.

The time scale changes. See Table 9-1: Time Scale Buttons for a description of each time scale.

Change views

You can also alter the look of the Journal by using the view options in the Current View group.

1. Click the **Journal** button in the Navigation Pane. The Journal appears.
2. Click the **Home** tab on the Ribbon and select the view you would like to use in the Current View group on the Ribbon.

A list of options appears. Table 9-2: Journal Views provides a description of different views.

- **Other Ways to Change a View:**
 Click the **View** tab on the Ribbon and click the **Change View** button in the Current View group.

& Exercise

- **Exercise File:** None required.
- **Exercise:** View the Journal in Day, Week, and then Month time scales.

Try out the different views in the Current View group on the Ribbon.

Table 9-1: Time Scale Buttons

	Select if you wish to view today's journal entries. Can select regardless of the time scale selected.
	View one day at a time.
	View one week at a time.
	View one month at a time.

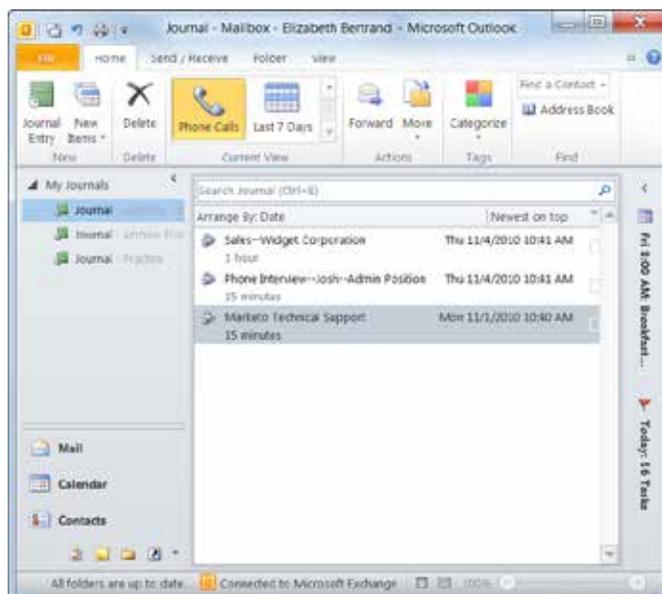


Figure 9-10: The Journal displayed in Phone Call view.

Table 9-2: Journal Views

Timeline	Displays journal entries in a timeline.
Entry List	Displays all journal entries in a list.
Phone Calls	Displays phone call-type journal entries in a list.
Last Seven Days	Displays the most recent journal entries in a list.

Working with Notes

Outlook's Notes are the electronic equivalent of sticky notes—but they won't clutter up your desk. Notes are handy when you need to create a quick note, such as the directions to a meeting or a shipping address.

This lesson explains the quick and easy process of creating and working with notes.

View Notes

- Click the **Notes** button in the Navigation Pane.
Your notes appear.

Create a note

- In Notes, click the **Home** tab on the Ribbon and click the **New Note** button in the New group.

A note appears.

- Other Ways to Create a Note:**
In Notes, press **<Ctrl> + <N>**.

- Enter the note text.
- Click the note's **Close** button.
Outlook automatically saves and closes the note, and the new note appears in Notes.

Open a note

- In Notes, double-click a note to open it.
You can edit note text as desired.

Print a note

- In Notes, select the note you want to print.
- Click the **File** tab on the Ribbon and select **Print**.
Options for printing appear.
- Click the **Print** button.
The note prints.

& Exercise

- Exercise File:** None required.
- Exercise:** Create a new note and enter the note text "This is my first note!" Close the note.
Open the note and change the text to "This is my second note!" Close the note.
Delete the note.

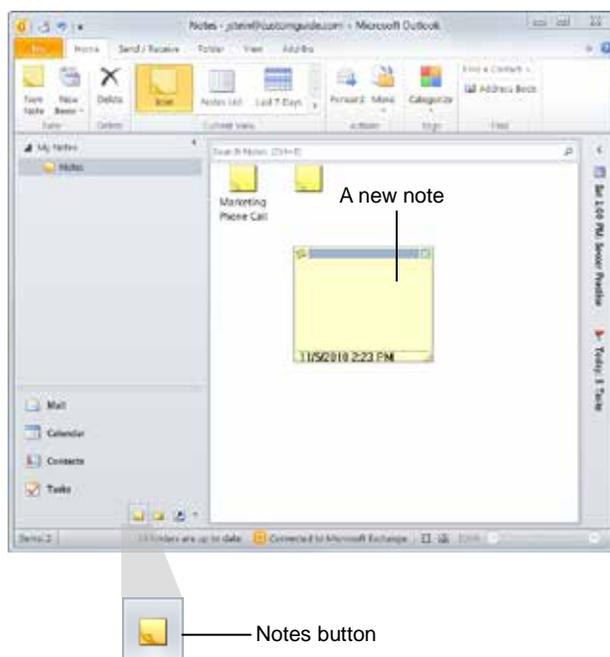


Figure 9-11: Viewing Notes and creating a new note.

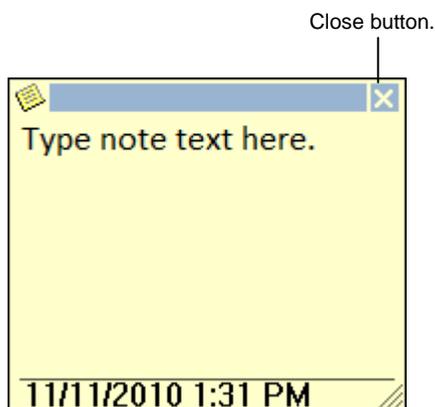


Figure 9-12: Working with a note.

Delete a note

1. In Notes, select the note you want to delete.
2. Click the **Home** tab on the Ribbon and click the **Delete** button in the Delete group.

The note is deleted.

Other Ways to Do Something:

Press <Delete>.

Tips

- Ü You can change the way Notes are displayed by clicking the Home tab on the Ribbon and selecting a different view option in the Current View group.
- Ü To resize a note window, click and drag the bottom-right corner of the note window.
- Ü Click and drag a note onto the Windows desktop to place a copy of it there.

Using the Journal and Notes Review

Quiz Questions

107. You must add the Journal to the Navigation Pane; it does not appear by default. (True or False?)
108. Which tab on the Ribbon allows you to attach an Outlook item or a file to a journal entry?
A. Journal
B. Memo
C. Insert
D. Entry
109. You can set up the Journal to automatically record when you send an e-mail to a certain contact. (True or False?)
110. You can relate a Journal entry to a Contact. (True or False?)
111. Once you create a journal entry, you can't edit it. (True or False?)
112. Which of the following is not a time scale option for viewing the Journal?
A. Year
B. Day
C. Week
D. Month
113. You can't print a note from Outlook. (True or False?)

Quiz Answers

107. True. You must add the Journal to the Navigation Pane; it does not appear by default.
108. C. The Insert tab features the Include group of commands, which allow you to attach items to a journal entry.
109. True. You can set up the Journal to automatically record when you send an e-mail to a certain contact.
110. True. You can relate a Journal entry to a Contact.
111. False. You can edit a journal entry, as well as delete it.
112. A. Year is not a time scale option for viewing the Journal

113. False. You can print Outlook notes.

Organizing and Finding Information

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When you work at your desk for a while, papers and files can pile up into a mess. The same thing happens after you've worked with Outlook for a while—your e-mails become disorganized and harder to find.

In this chapter, you'll learn how to take control and organize your Outlook e-mail messages. You'll learn how to search for items and manage data in folders.

If you wish, a file is available to you that you can use to practice the methods described in this chapter. Instructions on opening and using the file will be provided. See the lesson on "Working with Outlook Personal Folders Files" for more information.

Exploring the Folder List

Just like folders are used to organize papers in a filing cabinet, Windows uses folders to organize files and programs. You can copy, move, and delete files to and from the folders on your computer.

Outlook also uses folders to store the items you create in various modules: e-mail messages, appointments, contacts, and so on. Each Outlook tool stores its information in its own folders. These folders can be viewed in the Folder List in the Navigation Pane.

When you open Outlook you see only your Mail folders in the Navigation Pane; however, you can display all your Outlook folders (including folders such as the Calendar and Contacts folders) with the click of a button.

1. Click the **Folder List** button at the bottom of the Navigation Pane.

The Folder List appears in the Navigation Pane, showing you where all of your Outlook items are stored.

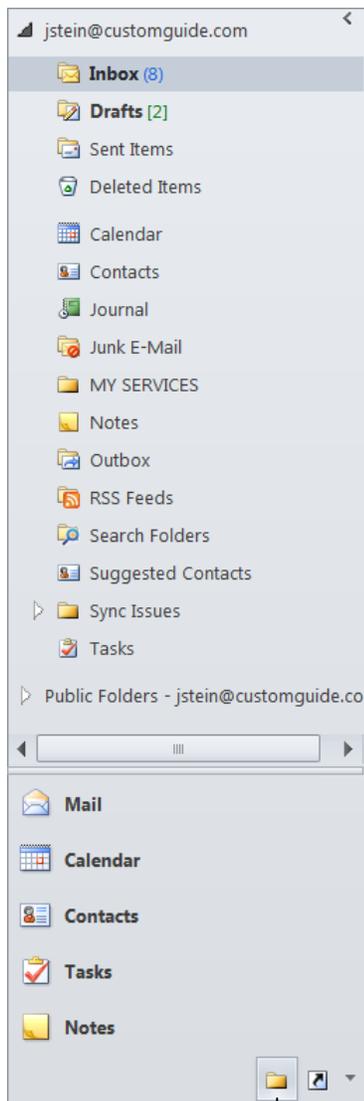
2. Click any folder in the list to display that folder's contents.

✓ Tips

- ü If one of your Outlook folders is getting too big to manage, you can organize and move its information into several new folders or subfolders. For example, you could create a "Personal" folder to store your personal e-mail.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Display the Folder List in the Navigation Pane.



Folder List button

Figure 10-1: The Folder List.

Creating and Using Folders

Outlook normally saves all your e-mail messages in the Inbox folder, but sooner or later you may need to create your own folders to organize your e-mail messages and other Outlook items more effectively.

This lesson shows you how to create a new folder for storing and organizing your Outlook items.

Create a new folder

1. Click the **Folder** tab on the Ribbon and click the **New Folder** button in the New group.

The Create New Folder dialog box appears.

Other Ways to Create a New Folder:
Right-click in the Folder List and select **New Folder** from the contextual menu.

2. Type a name for the folder in the Name text box.
3. Click the **Folder contains** list arrow and select the type of item the new folder will contain.

For example, you would select Mail and Post Items if you were creating a new folder to hold e-mail messages.

Next, you need to decide whether you want the folder to be a subfolder of another folder or not.

4. Select a folder in the “Select where to place the folder” list and click **OK**.

The new folder appears as a subfolder within the folder you selected.

✓ Tips

- ü If you don't want the new folder to be a subfolder, make sure you select the Mailbox folder at the top of the list when you're creating the new folder—in which case the new folder will appear alphabetically with the other folders in the list.

Move messages between folders

Once you set up the folders you want, you can organize your messages by moving them into the desired folders.

1. Select the folder in the Folder List that contains the message(s) you want to move.

Tip: To move multiple messages at once, press and hold the **<Ctrl>** key while you select the messages.

& Exercise

- **Exercise File:** Practice.pst (Click the **File** tab on the Ribbon, select **Open**, and click **Open Outlook Data File**. Browse to the Outlook 2010 Practice folder and select **Practice.pst**. Click **Open**.)
- **Exercise:** Create a new mail folder under the Practice Inbox and name it “Training”.

Move the Training message from your Inbox into the Training folder.

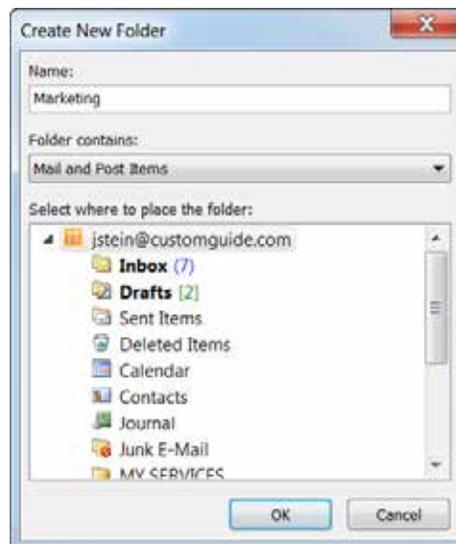


Figure 10-2: The Create New Folder dialog box.

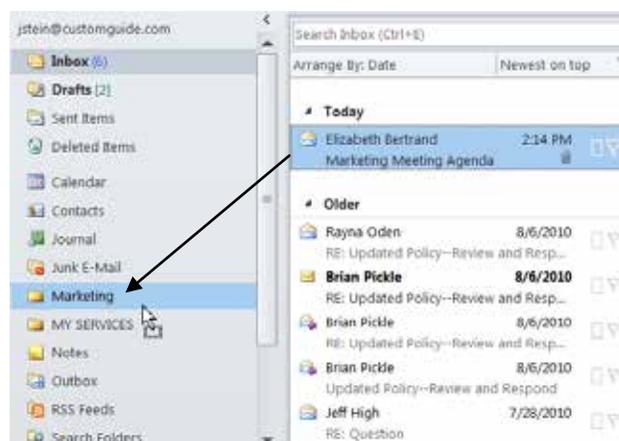


Figure 10-3: Moving a message from the Inbox folder to the Marketing folder.

2. Click and drag the message(s) to a different folder in the Folder List.

Other Ways to Move Messages Between Folders:

Right-click the message(s) you want to move and select **Move to Folder**. Select the destination folder in the Move Items dialog box and click **OK**. Or, click the **Home** tab on the Ribbon, click the **Move** button in the Move group, and select a folder from the list.

Create a Move to Folder quick step

In Outlook 2010, you can create quick steps, which are shortcuts for common Outlook actions. If you find yourself constantly moving messages to a particular folder, you can create a Move to Folder quick step and save yourself some time.

1. Click the **Mail** button in the Navigation Pane.
The Inbox appears.
 - ❗ **Trap:** Quick steps are only available in Outlook's Mail module.
2. Click the **Home** tab on the Ribbon and click the **Create New** button in the Quick Steps group.
The Edit Quick Step dialog box appears.
3. Type a name for your new quick step in the Name box.
Now you need to indicate to that the action is to move an item to a folder.
4. Click the **Actions** list arrow and select **Move to folder** from the list.
Once you've specified the action, you need to select which folder you'd like to move messages to.
5. Click the **Choose folder** list arrow and select the folder you would like to use.
6. Click **Finish**.
The new quick step appears in the Quick Steps group.

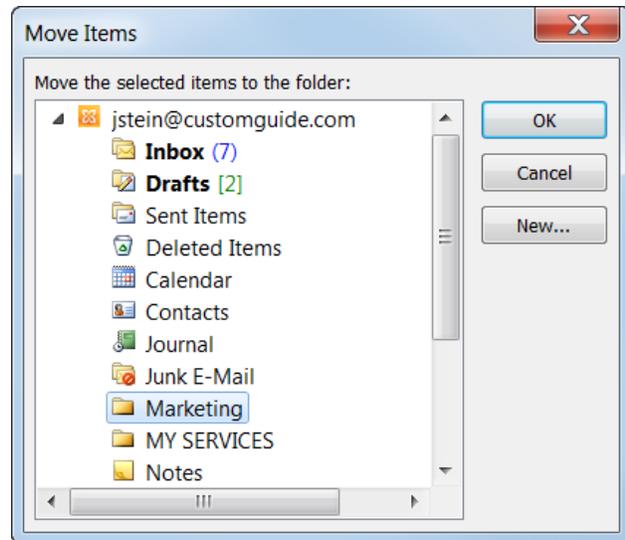


Figure 10-4: The Move Items dialog box.

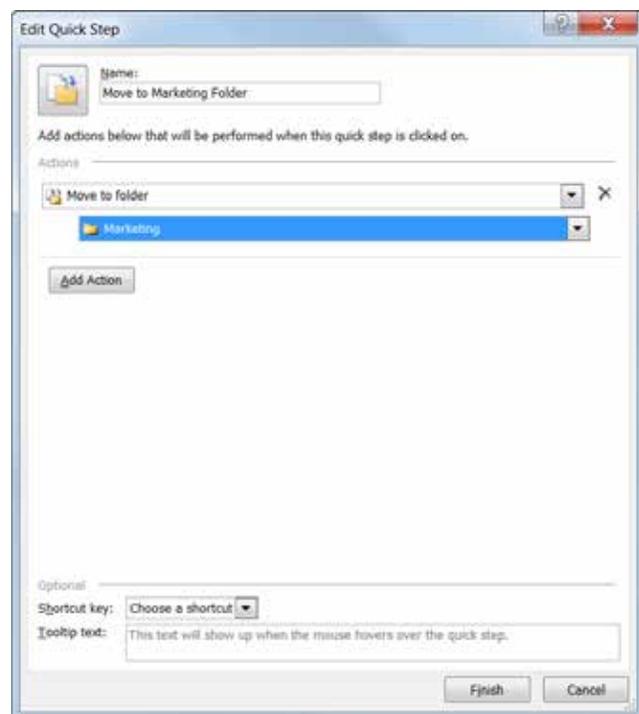


Figure 10-5: The Edit Quick Step dialog box.

Managing Folders

You can reorganize your folders by renaming them, moving them, and even deleting them.

✓ Tips

- ü To rename, move, or delete a folder, you need to first display either the Folder List or the Mail pane.
- ü If a folder in the Folder List has subfolders, it will have a ▸ Triangle icon next to it. Click the ▸ Triangle icon to expand the folder and view the subfolders. Click the ▾ Triangle icon to collapse them again.

Rename a folder

1. Select the folder you want to rename in the Folder List.
2. Click the **Folder** tab on the Ribbon and click the **Rename Folder** button in the Actions group.

The folder name becomes editable.

- **Other Ways to Rename a Folder:**
Right-click the folder and select **Rename** from the contextual menu.

3. Enter a new name and press **<Enter>**.
The folder is renamed.

Move a folder

1. Select the folder you want to move in the Folder List.
2. Click the **Folder** tab on the Ribbon and click the **Move Folder** button in the Actions group.

The Move Folder dialog box appears.

3. Select the desired location and click **OK**.

If you move a folder into another folder, it becomes a subfolder of that folder.

- **Other Ways to Move a Folder:**
Click and drag the folder to the desired location.

- ✓ **Tip:** If multiple folders are at the same folder level in the Folder List, they are arranged alphabetically.

& Exercise

- **Exercise File:** Practice.pst (Click the **File** tab on the Ribbon, select **Open**, and click **Open Outlook Data File**. Browse to the Outlook 2010 Practice folder and select **Practice.pst**. Click **Open**.)
- **Exercise:** Rename the Rename Me folder to “Recipes”.
Move the Recipes folder so that it is a subfolder of the Inbox.
Delete the Recipes folder.

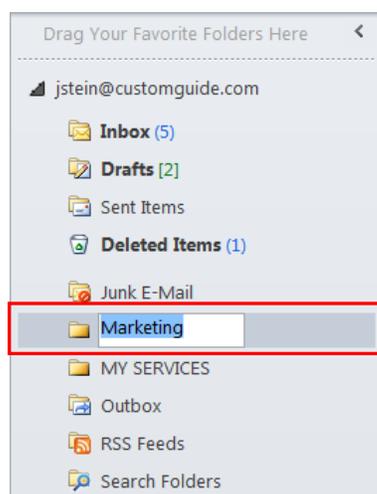


Figure 10-6: Renaming a folder.

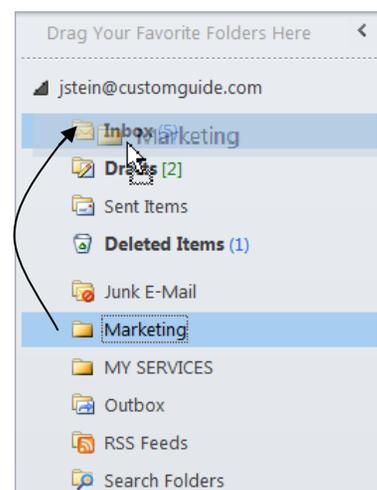


Figure 10-7: Moving the Marketing folder so it becomes a subfolder of the Inbox folder.

Delete a folder

1. Select the folder you want to delete in the Folder List.
2. Click the **Folder** tab on the Ribbon and click the **Delete Folder** button in the Actions group.

A warning message appears, asking if you're sure you want to delete the folder.

 **Other Ways to Delete a Folder:**

Right-click the folder select **Delete Folder** from the contextual menu. Or, press <Delete>.

3. Click **Yes** to confirm the deletion.

The folder and its contents are moved to the Deleted Items folder.

Using Instant Search

The Instant Search feature helps you find messages and other types of items in Outlook. Although you're most likely to use it to search for e-mail messages, you can use the Instant Search feature in Calendar, Contacts, Tasks, Notes, Folder List, and Journal as well.

Find a message or item

Instant Search is very easy to use. Simply enter text into the Instant Search box to find messages or other Outlook items that contain that text.

1. Click the **Instant Search** box and enter the text you are searching for.

If you are searching Mail or Calendar items, the Search Suggestions list appears. This search feature is new in Outlook 2010, and it lets you further define your search by:

- **Keyword:** Searches the text of the e-mail or calendar item for the word or phrase.
- **From (for Mail) or Organizer (for Calendar):** Searches by who sent the message or calendar item.
- **Subject:** Searches the subject of e-mail messages or calendar items to match the search terms.
- ✓ **Tip:** The Search Suggestions list does not appear in Contacts, Tasks, Notes, and Journal. These modules continue to use keyword search.

2. (If you are searching Mail or Calendar items) Select the search option you wish to use, or do not select a search option to use the default keyword search.

Outlook displays any items that contain the previously entered text. It isn't necessary to click the Search button to start searching—items that contain the text you entered automatically appear in the Search Results pane with the search text highlighted.

- ✓ **Tip:** The items you find depend on where you are searching. If you are searching your Inbox folder in Mail, for example, messages appear in the search results. If you are searching the Calendar, calendar items like appointments appear.

3. Open the item that you are looking for.

If you find the item you need, you can clear the search so all items are displayed again.

& Exercise

- **Exercise File:** Practice.pst (Click the **File** tab on the Ribbon, select **Open**, and click **Open Outlook Data File**. Browse to the Outlook 2010 Practice folder and select **Practice.pst**. Click **Open**.)
- **Exercise:** Search the Practice Inbox for “staff meeting”. Clear the search.

Enter text you want to search for here. Instant Search returns results as you type. You don't need to press <Enter> to return results.

Clear Search button

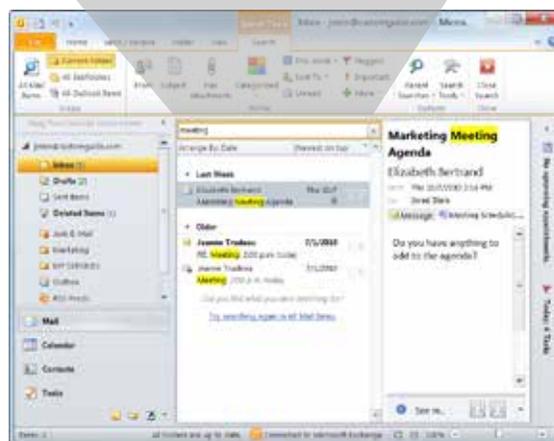
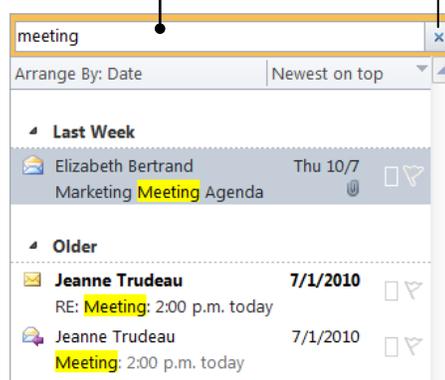


Figure 10-8: Using Instant Search in the Outlook program window.

Organizing and Finding Information

4. Click the **Clear Search** button.

All the items are displayed, and the Instant Search box is empty.

Use recent searches

Outlook keeps track of recent searches you've performed so you can reuse them.

1. Click the **Instant Search** box.
The Search tab appears on the Ribbon.
2. Click the **Search** tab on the Ribbon and click the **Recent Searches** button in the Options group.
A list of your 10 most recent searches appears.
3. Select the search you want to use.

Outlook returns the results that match the search criteria.

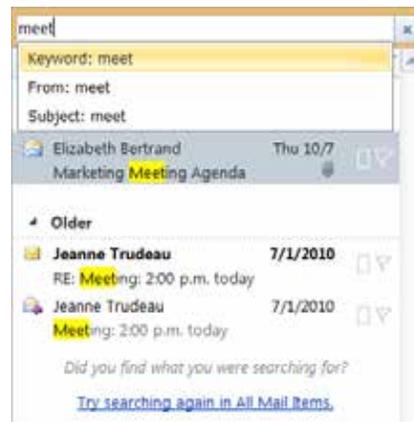


Figure 10-9: Use the Search Suggestions list to search by keyword, sender, or subject.

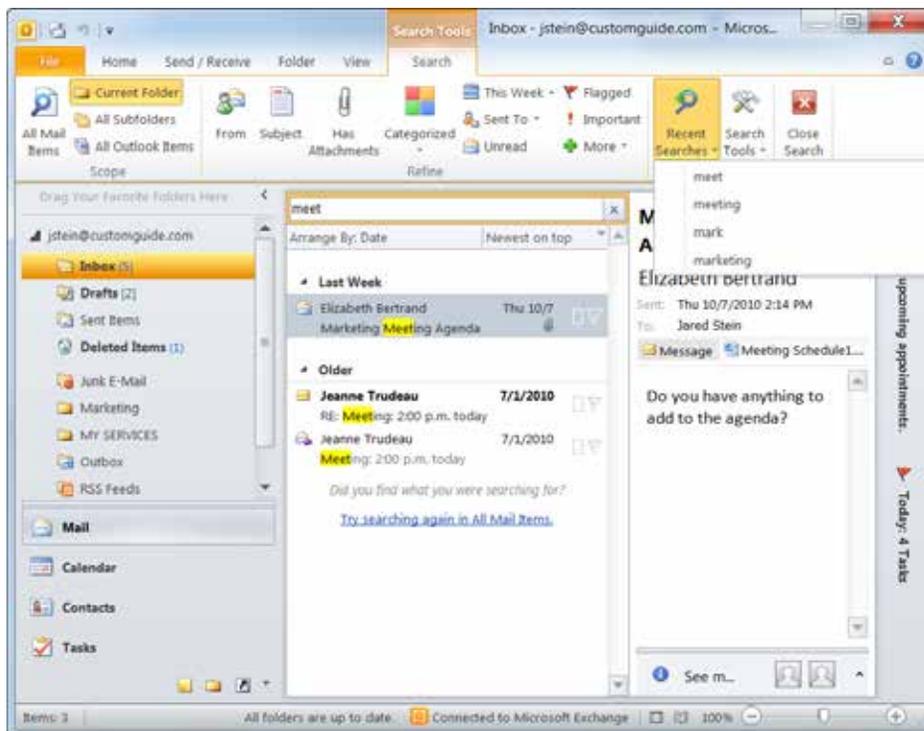


Figure 10-10: Using the Recent Searches feature.

Refining a Search

Outlook's Instant Search feature is powerful, but sometimes the results aren't quite what you were looking for. You can easily refine your search by changing the search criteria. The Search tab, a feature new to Outlook 2010, makes it simpler than ever to customize your search.

Expand a search

By default, only the selected folder is searched when you use Instant Search, but you can easily expand your search to additional folders.

1. Click the **Instant Search** box and enter the text you are searching for.

The Search contextual tab appears on the Ribbon.

2. Click the **Search** tab on the Ribbon.

The Scope group contains several options to expand your search:

- **All Mail Items:** Searches all items in your mailbox.
- **Current Folder:** Restricts your search to the currently select folder. This is the default setting.
- **All Subfolders:** Searches the selected folder as well as any of its subfolders.
- **All Outlook Items:** Searches all Outlook items, including Calendar items, Contacts, and Tasks.

3. Click the appropriate button in the Scope group.

The search is expanded or restricted depending on the selected option.

- **Other Ways to Expand a Search:**
Click the **Try Searching Again in All Mail Items** link at the bottom of the Search pane.

& Exercise

- **Exercise File:** Practice.pst (Click the **File** tab on the Ribbon, select **Open**, and click **Open Outlook Data File**. Browse to the Outlook 2010 Practice folder and select **Practice.pst**. Click **Open**.)
- **Exercise:** Search the Practice Inbox for all messages with the Meetings category. Clear the search.
Search for the message with the subject "Report due".

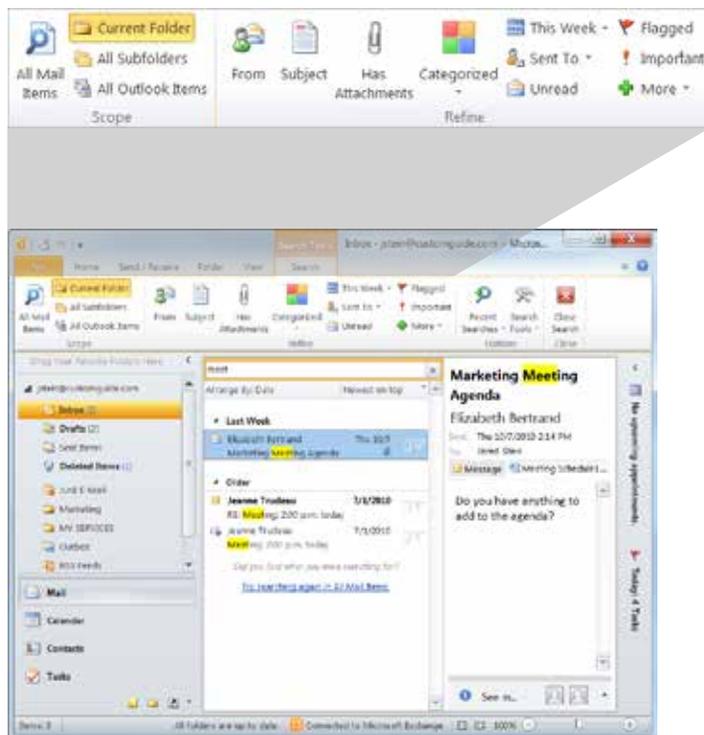


Figure 10-11: The Search tab includes many options for expanding and refining your searches.

Refine a search

If your search returns too many results, you can narrow it down. The Search tab displays all criteria for filtering a search, making it easier to find exactly what you need.

1. Click the **Instant Search** box and enter the text you are searching for.
2. Click the **Search** tab on the Ribbon.
The Refine group features several options to narrow your search. The options that appear depend on the Outlook module you are searching.
3. Click the appropriate button in the Refine group and follow the prompts to refine your search.

You may need to select additional options or enter additional text in the Instant Search box depending on how you refine your search.

Change search options

If you don't like how Instant Search is working, you can change the search options.

1. Click the **Insert Search** box on the Ribbon.
2. Click the **Search** tab on the Ribbon and click the **Search Tools** button in the Options group.
A list of options appears.
3. Select **Search Options** from the list.

The Outlook Options dialog box appears. You can change how Outlook indexes your items as well as how Instant Search works.

- 🔗 **Other Ways to Change Search Options:**
Click the **File** tab on the Ribbon, select **Options**, and click the **Search** tab in the Outlook Options dialog box.
- ✔ **Tip:** Click the **Indexing Options** button to modify how Outlook indexes your items.

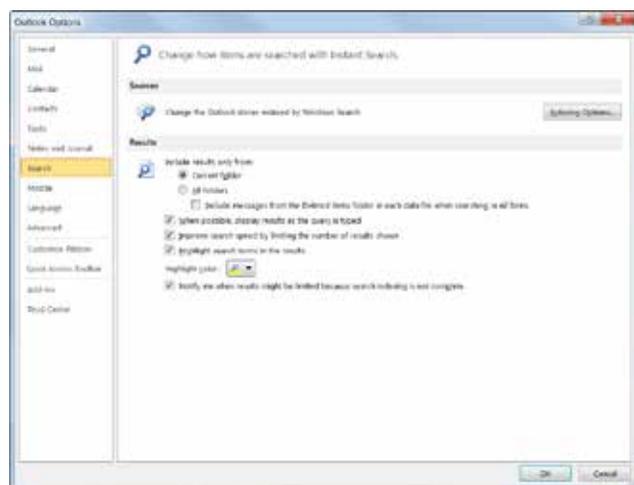


Figure 10-12: The Search tab of the Outlook Options dialog box.

Using Advanced Find

Most of the time, you can find what you're looking for using Instant Search. However, Outlook's Advanced Find feature helps you if you need to widen your search.

Advanced Find is more difficult to use than Instant Search, but Advanced Find has its advantages:

- Advanced Find can search through all Outlook folders at once. For example, Advanced Find could retrieve appointments, e-mails, and tasks that contain the word "squash".
- Advanced Find can search for items based on their category, flag type, or importance level.
- Advanced Find can look for a word or phrase in all fields.

The purpose of this lesson isn't to explain every Advanced Find option, but to introduce the feature. Most of the Advanced Find options are self-explanatory, and you won't need a reference guide to use them.

1. Click the **Instant Search** box.

The Search contextual tab appears.

2. Click the **Search** tab on the Ribbon and click the **Search Tools** button in the Options group.

A list of options appears.

3. Select **Advanced Find** from the list.

The Advanced Find dialog box appears. You can use the dialog box to search all of your Outlook folders for a word or phrase. You can also search for e-mail messages to and/or from a particular person, read or unread e-mail messages, and many more criteria.

Each tab in the Advanced Find dialog box provides different options:

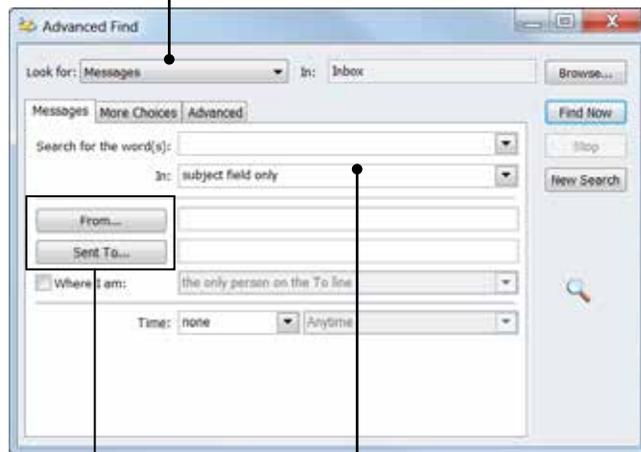
- **Messages:** Search for a word or phrase, specify which fields to search, and specify who sent or received the message(s).
- **More Choices:** Lets you specify the category of the item(s) you want to find. You can also specify to find only read or unread messages, items with or without attachments, or items whose importance is high, normal, or low.
- **Advanced:** Lets you find items by specifying advanced search criteria, such as specific fields to search.

 **Other Ways to Open Advanced Find:**
Press <Ctrl> + <Shift> + <F>.

& Exercise

- **Exercise File:** Practice.pst (Click the **File** tab on the Ribbon, select **Open**, and click **Open Outlook Data File**. Browse to the Outlook 2010 Practice folder and select **Practice.pst**. Click **Open**.)
- **Exercise:** Open Advanced Find and search for the word "Friday" in any type of Outlook item.

Select the type of item you want to find. To search all item types, select "Any type of Outlook item".



Click to open the Address Book and select either a sender or recipient.

Specify the field(s) you want to search. The more fields you specify, the longer the search will take.

Figure 10-13: The Advanced Find dialog box.

4. Specify your search criteria in the Advanced Find dialog box and click the **Find Now** button.

Outlook searches for items that match the criteria and displays the results at the bottom of the Advanced Find dialog box.

5. Close the Advanced Find dialog box when you're finished.

Creating and Using Search Folders

Search Folders are valuable e-mail organization tools. Unlike the other Outlook folders, Search Folders are virtual folders that display messages that match specific criteria. The message themselves are stored in other Outlook folders, such as the Inbox.

Because you don't have to constantly move and copy items to other folders in Outlook, Search Folders are easy to use and are more effective for sorting and organizing than standard folders.

There are three default Search Folders in Outlook:

- **Categorized Mail:** All messages that have been assigned a category appear here.
- **Large Mail:** E-mail items larger than 100 KB appear here.
- **Unread Mail:** All messages that haven't been read appear here.

Use a Search Folder

Viewing messages in a Search Folder is the same as viewing messages in any other Outlook folder.

- Click a Search Folder in the Navigation Pane.
The Search Folder displays messages that meet a specific set of criteria.

Create a custom Search Folder

You can create your own custom Search Folders to view e-mail messages.

1. Click the **Folder** tab on the Ribbon and click the **New Search Folder** button in the New group.

The New Search Folder dialog box appears. You can create a new Search Folder using one of the options in the list. All you need to do is select an option and enter any additional criteria. You can also create a custom Search Folder to meet more specific criteria.

 **Other Ways to Create a New Search Folder:**
Press <Ctrl> + <Shift> + <P>.

2. Select **Create a custom Search Folder** from the bottom of the list and click the **Choose** button.

The Custom Search Folder dialog box appears.

& Exercise

- **Exercise File:** Practice.pst (Click the **File** tab on the Ribbon, select **Open**, and click **Open Outlook Data File**. Browse to the Outlook 2010 Practice folder and select **Practice.pst**. Click **Open**.)
- **Exercise:** View the Unread Mail Search Folder.

Create a new Search Folder called "Staff Meetings" and set its criteria to search only the Inbox folder for messages that contain "staff meeting" in the subject or message body.

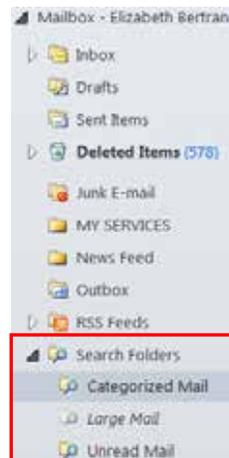


Figure 10-14: Search Folders in the Navigation Pane.

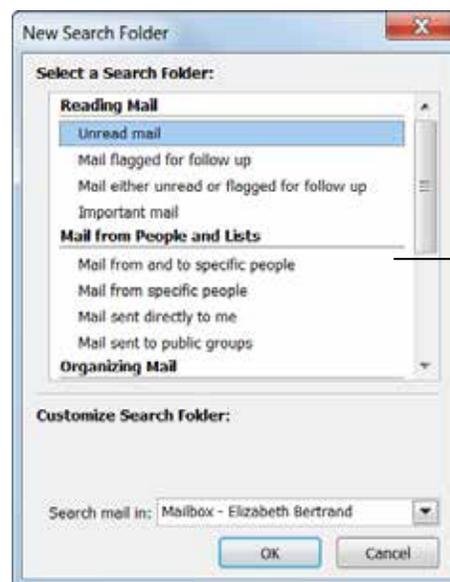


Figure 10-15: The New Search Folder dialog box.

Organizing and Finding Information

3. Type a name for the Search Folder in the Name box.

Choose a name that describes the Search Folder.

4. Click the **Criteria** button.

The Search Folder Criteria dialog box appears. Here you can select criteria on the Messages, More Choices, and Advanced tabs.

5. Enter criteria for the Search Folder and click **OK**.

Now you need to select which folders you want to search using those criteria.

6. Click the **Browse** button.

The Select Folder(s) dialog box appears.

7. Select the folders you want to search and click **OK**.

Your Search Folder is created; you simply need to exit the dialog boxes.

8. Click **OK** twice.

The dialog boxes closes, and your Search Folder appears in the Navigation Pane.



Figure 10-16: The Custom Search Folder dialog box.

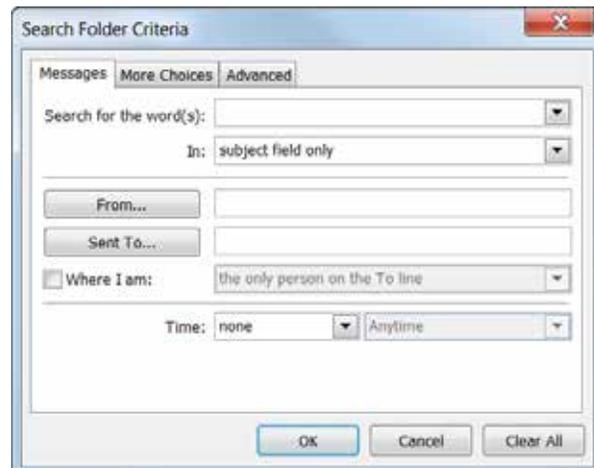


Figure 10-17: The Search Folder Criteria dialog box.

Modifying and Deleting Search Folders

Like any other set of folders, you can keep your Search Folders organized by modifying and deleting them.

Modify a Search Folder

If a Search Folder isn't displaying the results you want to see, you can modify its criteria.

1. Select a Search Folder in the Navigation Pane.
2. Click the **Folder** tab on the Ribbon and click the **Customize this Search Folder** button in the Actions group.

The Customize "Search Folder name" dialog box appears. There are three ways to modify the Search Folder:

- **Name:** Enter a new name for the Search Folder in the Name text box.
 - **Criteria:** Click the **Criteria** button to change the search criteria. You can only change criteria for custom Search Folders, not pre-set folders.
 - **Location:** Click the **Browse** button to change the folders included in the Search Folder.
- 🔴 **Other Ways to Modify a Search Folder:**
Right-click the Search Folder and select **Customize this Search Folder** from the contextual menu.

3. Modify the name, criteria, or folders included in the search and click **OK**.

Delete a Search Folder

Because Search Folders do not store items, you can delete them without losing information.

1. Select a Search Folder in the Navigation Pane.
2. Click the **Folder** tab on the Ribbon and click the **Delete Folder** button in the Actions group.
A warning message appears.
🔴 **Other Ways to Delete a Search Folder:**
Right-click the Search Folder and select **Delete Folder** from the contextual menu.
3. Click **Yes** to confirm the deletion.
The Search Folder is deleted.

& Exercise

- **Exercise File:** Practice.pst (Click the **File** tab on the Ribbon, select **Open**, and click **Open Outlook Data File**. Browse to the Outlook 2010 Practice folder and select **Practice.pst**. Click **Open**.)
- **Exercise:** Change the Project Search Folder criteria so it also searches for messages in the Red category.
Delete the Custom Folder Search Folder.



Figure 10-18: Modifying a Search Folder.

Sorting and Grouping Information

You can use Outlook’s sorting and grouping options to make finding information much easier. For example, if you need to find a message that’s buried in a folder, you can sort the folder so the oldest messages are displayed at the top of the Message list.

Sort by one field

1. Click the **Arrange By** column heading.

A list of fields by which you can arrange the view appears.
2. Select the option you want to use to sort the folder.

The items are arranged by the selected field. Note that the Ascending/Descending button changes to denote how the items are arranged as well.

Sort by multiple fields

1. Click the **View** tab on the Ribbon and click the **View Settings** button in the Current View group.

The Advanced View Settings dialog box appears. The field that is currently used to sort the view is displayed next to the Sort button. To change this setting, open the Sort dialog box.

2. Click the **Sort** button.

The Sort dialog box appears. You can sort by up to four different fields. You can also choose whether to sort by the field in Ascending or Descending order. Refer to Table 10-1: Sort Examples for some guidance on choosing fields by which to sort.

Tip: The fields you can choose from in the dialog box are not limited to the fields currently displayed in the view.

3. Specify the fields you want to use to sort and click **OK**.

The view is sorted accordingly.

& Exercise

- **Exercise File:** Practice.pst (Click the **File** tab on the Ribbon, select **Open**, and click **Open Outlook Data File**. Browse to the Outlook 2010 Practice folder and select **Practice.pst**. Click **Open**.)
- **Exercise:** Arrange the Inbox by Subject in descending order.
Rearrange the Inbox by Date in ascending order.



Figure 10-19: Choosing a field by which to sort.



Figure 10-20: The Sort dialog box.

Table 10-1: Sort Examples

	Alphabetic	Numeric	Date
Ascending	A, B, C	1, 2, 3	1/1/10, 1/15/10, 2/1/10
Descending	C, B, A	3, 2, 1	2/1/10, 1/15/10, 1/1/10

Arrange by groups

Outlook automatically groups items in a folder, which makes it easier to find things. For example, when items are arranged by date, they are grouped by the individual days from the past week, then they are grouped by week, then by month. To ungroup items, turn this feature on.

1. Click the **View** tab on the Ribbon and click the **More** button in the Arrangement group.

A list of options appears.

2. Select the **Show in Groups** option.

The checkmark is cleared, and the message group headings are hidden.

✔ **Tip:** Select **Show in Groups** again to return the group headings.

🔗 **Other Ways to Toggle Grouped Views:**
Click the **Arrange By** column heading and select **Show in Groups** from the contextual menu.

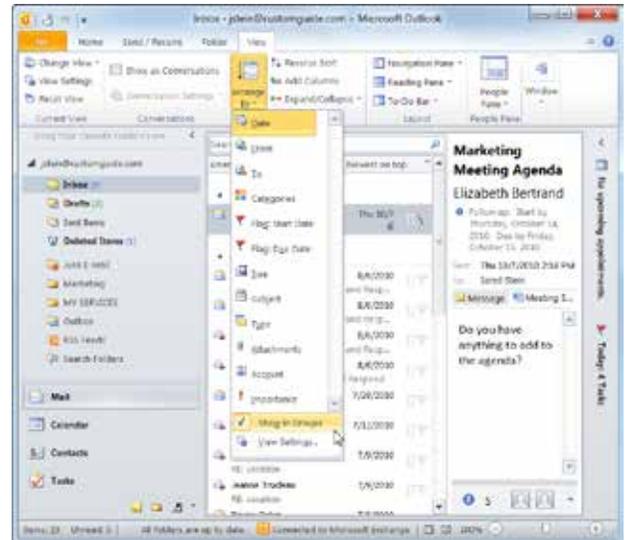


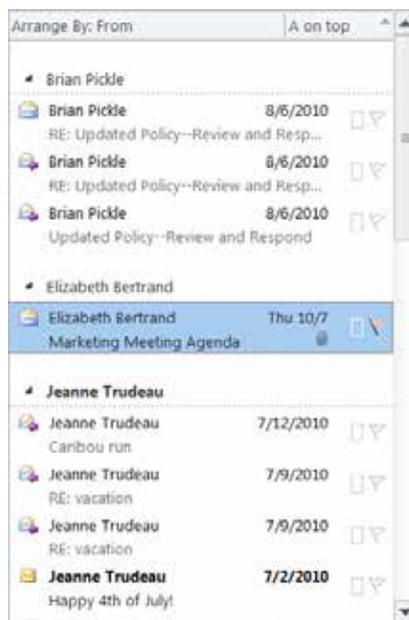
Figure 10-21: Click Arrange By and select Show in Groups to group and ungroup Outlook items.

Expand or collapse a group

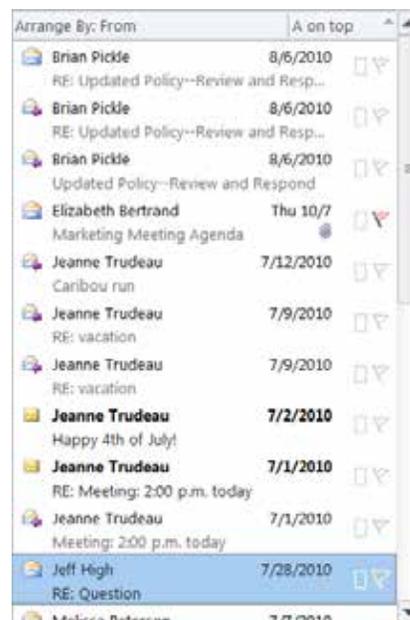
Notice the Triangle icon next to each group. The ▾ Triangle icon indicates that the group is collapsed. The ▸ Triangle icon means that the group is expanded.

- Click the group's **Triangle** icon.

The group's contents are either expanded or collapsed.



Grouped messages



Ungrouped messages

Figure 10-22: Grouping and ungrouping messages doesn't change how the items are sorted, but rather how the items are displayed.

Filtering Information

Filters let you see information based on criteria you specify. You can apply a filter to a folder or view in Outlook to display the information you need. For example, you could filter the Contacts list to display only those clients who live in California.

Filter using common criteria

The most basic way to filter information is using common criteria.

1. Navigate to the folder to which you want to apply a filter.

For example, click the **Contacts** button in the Navigation Pane to display the Contacts folder.

2. Click the **View** tab on the Ribbon and click the **View Settings** button in the Current View group.

The Advanced View Settings dialog box appears.

3. Click the **Filter** button.

The Filter dialog box appears. The tab that appears depends on the type of folder being filtered.

4. On the tab that is displayed by default, specify the options you want to use and click **OK**, **OK** when you're finished.

The selected folder is filtered according to the criteria you specified.

Filter using additional criteria

You can also filter using additional criteria, such as category or importance level.

1. Navigate to the folder to which you want to apply a filter.

2. Click the **View** tab on the Ribbon and click the **View Settings** button in the Current View group.

The Advanced View Settings dialog box appears.

3. Click the **Filter** button.

The Filter dialog box appears.

4. Click the **More Choices** tab.

You can filter by category, read and unread items, items that include attachments, assigned importance, flag, or the size of the item.

& Exercise

- **Exercise File:** Practice.pst (Click the **File** tab on the Ribbon, select **Open**, and click **Open Outlook Data File**. Browse to the Outlook 2010 Practice folder and select **Practice.pst**. Click **Open**.)
- **Exercise:** Apply a filter to the Contacts folder to display only contacts with NE in the Address field.

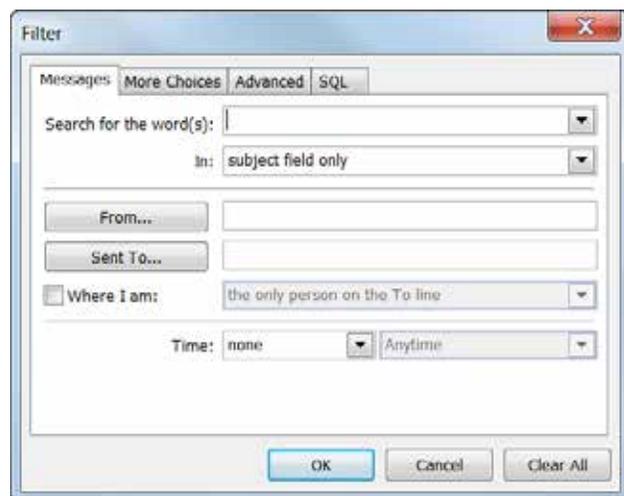


Figure 10-23: The Filter dialog box, as it appears when filtering the Inbox.

5. Select the filter options you want to use and click **OK, OK** when you're finished.

Filter using custom criteria

You can create a custom filter to filter information by field.

1. Navigate to the folder to which you want to apply a filter.
2. Click the **View** tab on the Ribbon and click the **View Settings** button in the Current View group.

The Advanced View Settings dialog box appears.

3. Click the **Filter** button.

The Filter dialog box appears.

4. Click the **Advanced** tab and click the **Field** list arrow.

5. Point to the field set you want, and then click the field you want to use in the search criteria.

6. Click the **Condition** list arrow and select the condition you want to use with the selected field.

The conditions that are available depend on the field that is selected.

7. If the condition requires a value, click the **Value** text box and enter a value.

For example, if you want to filter the Contacts list to display only those contacts who live in California, you would type "CA" in the Value text box.

8. Click **OK, OK** when you're finished.

Remove a filter

1. Navigate to the folder from which you want to remove the filter.

2. Click the **View** tab on the Ribbon and click the **View Settings** button in the Current View group.

The Advanced View Settings dialog box appears.

3. Click the **Filter** button.

The Filter dialog box appears.

4. Click the **Clear All** button in the bottom-right corner of the dialog box and click **OK, OK**.

The filter is removed.

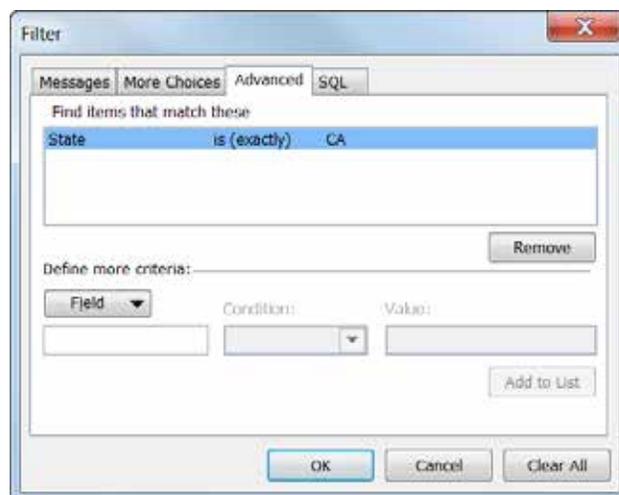


Figure 10-24: The Advanced tab of the Filter dialog box.

Using the People Pane

Your co-worker just asked if you've reviewed the presentation she e-mailed you yesterday; however, you can't find her message. Lucky for you, Outlook 2010 added the People Pane. Now you can view all your correspondence with a contact, as well as other information in one place.

Find information about a contact

The People Pane consolidates your correspondence with a contact. The easiest place to view the People Pane is in Mail, but you can display the People Pane in any almost any item window.

1. Click the **Mail** button in the Navigation Pane and select a message.

The People Pane displays at the bottom of the Reading Pane.

Other Ways to View the People Pane:

Open an e-mail message, contact, or calendar item. The People Pane displays at the bottom of the item window.

The People Pane includes tabs that display specific information about a contact, such as a list of e-mail messages they have sent you. The table below, *People Pane Tabs*, lists the tabs on the People Pane.

2. Click the appropriate tab in the People Pane to view more information about the contact.

The People Pane displays information about the contact.

Hide the People Pane

The People Pane takes up valuable screen space, so you may want to minimize it or even turn it off.

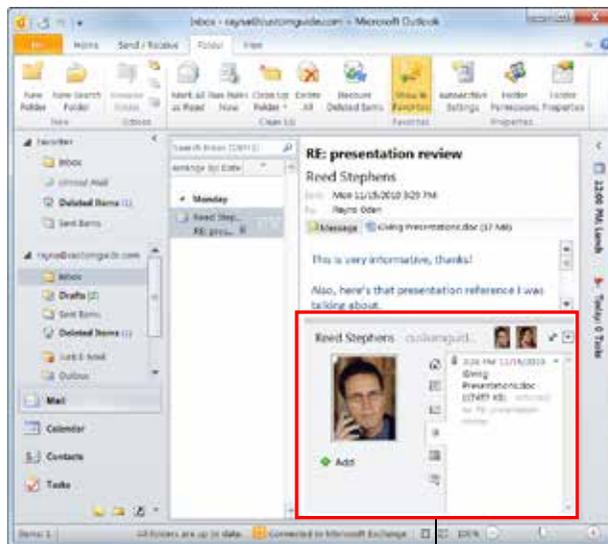
1. In the Outlook program window, click the **View** tab on the Ribbon and click the **People Pane** button in the People Pane group.

A list of options appears. There are two options to hide the People Pane:

- **Minimized:** Displays a collapsed People Pane at the bottom of the Reading Pane or item window.
- **Off:** Disables the Reading Pane.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Select a contact and view his or her information in the People Pane.
Minimize the People Pane.



The People Pane

Figure 10-25: The People Pane displays e-mails, meeting requests, status updates, and other information from a contact.

Table 10-2: People Pane Tabs

 All Items	Displays e-mail, meetings, and other activity for a contact.
 Activities	Displays news feed updates and RSS articles about a contact.
 Mail	Displays e-mail messages that you have received from a contact.
 Attachments	Displays attachments you have received from a contact.
 Meetings	Displays meetings requests from a contact.
 Status Updates	Displays status updates submitted by a contact.

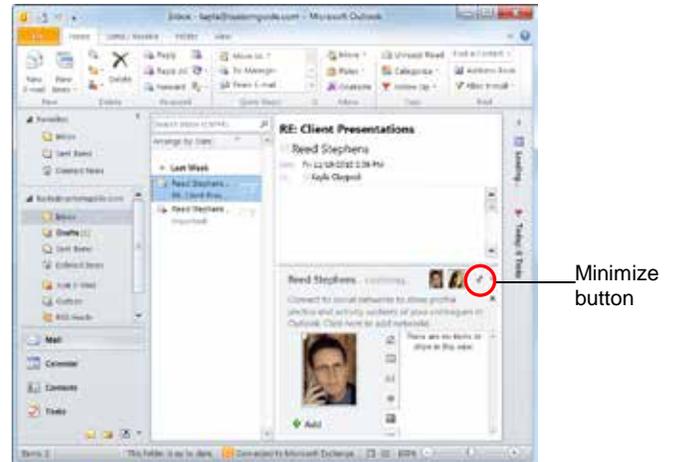
Organizing and Finding Information

2. Select **Minimized** or **Off**.

The People Pane closes.

🕒 **Other Ways to Minimize the People Pane:**
Click the **Minimize** button in the People Pane.

✅ **Tip:** To display the People Pane again, click the **People Pane** button in the People Pane group and select **Normal**.



The People Pane expanded.

Click the Minimize button.



The People Pane collapsed.

Figure 10-26: Click the Minimize button to collapse the People Pane.

Organizing and Finding Information Review

Quiz Questions

114. You can view all your Outlook folders in the _____ List.
- A. Folder
 - B. Mail
 - C. Inbox
 - D. Message
115. You cannot move messages between folders in Outlook. (True or False?)
116. Click the _____ icon next to a folder to expand it and view its subfolders.
- A. Minus
 - B. Triangle
 - C. Envelope
 - D. Magnifying Glass
117. You can reuse recent searches. (True or False?)
118. Click the _____ tab to refine your search.
- A. Home
 - B. Folder
 - C. Search
 - D. View
119. What command could you use to search all Outlook items (e-mails, appointments, tasks, etc.) for the phrase *money laundering*?
- A. Find
 - B. You can't; Outlook can only search the current folder.
 - C. Search Folders
 - D. Advanced Find
120. You need to move and copy items to Search Folders in order to view them. (True or False?)
121. You cannot modify the criteria of a Search Folder that you created. (True or False?)
122. Items can be sorted by multiple fields. (True or False?)
123. Messages are organized into groups by default. (True or False?)

124. When a filter is applied, items that do not meet the filter's criteria are deleted. (True or False?)
125. Which of the following is NOT a tab in the People Pane?
- A. Contacts
 - B. Mail
 - C. Attachments
 - D. Meetings

Quiz Answers

114. A. The Folder List displays all your Outlook folders.
115. False. You can easily move messages between different folders in Outlook.
116. B. Click the Triangle icon next to a folder to expand it and view its subfolders.
117. True. You can reuse recent searches.
118. C. Click the Search tab to refine your search.
119. D. The Advanced Find command lets you search all Outlook items for a word or phrase.
120. False. Search Folders are virtual folders that provide views of e-mails that match specific criteria. They do not store messages.
121. False. You can modify the criteria of a Search Folder that you created.
122. True. The quickest way to sort is using column headings, but you can customize the view to be sorted by multiple fields.
123. True. Groups make it easier to find messages that fall under the same Arrange By criteria.
124. False. Items that do not meet the filter's criteria are temporarily hidden until the filter is removed; they are not deleted.
125. A. There is no Contacts tab in the People Pane.

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Outlook has many useful tools to keep you organized, but using those tools themselves can be time-consuming. It takes time to read through the mountain of e-mails you receive every day and make sure they're assigned to the correct folder, given the correct priority, or put on your task list.

Outlook includes two useful tools, quick steps and rules, which allow you to act on messages quickly. Quick steps cut down the number of clicks it takes to move a message to a folder, or to forward or reply to a message. Rules are a bit different; they can sort through your messages automatically. This chapter teaches you how to set up both tools and manage them so you can work more efficiently.

Creating Quick Steps

Quick steps are great tools new in Outlook 2010. They allow you to act on your e-mail using only a mouse click. There are two ways you can create quick steps: you can customize a default quick step, or you can create a custom quick step.

Customize a default quick step

Outlook has several default quick steps based on common actions. You can customize these quick steps to meet your needs.

1. Click the **Mail** button in the Navigation Pane.
The Inbox folder appears.
2. Click the **Home** tab on the Ribbon and click the **More** button in the Quick Steps group.
A list of quick step options appears.
3. Select **Manage Quick Steps** from the list.
The Manage Quick Steps dialog box appears.
 - Other Ways to Open the Manage Quick Steps Dialog Box:
Click the **Dialog Box Launcher** in the Quick Steps group.
4. Select the quick step you want to change in the Quick Step box and click the **Edit** button.
The Edit Quick Step dialog box appears. You can modify existing actions or add additional actions to a quick step in the Edit Quick Step dialog box.
5. Edit the quick step as necessary and click **Save**.

Create your own quick step

If you maintain multiple folders, correspond with multiple teams, or have multiple people with whom you regularly communicate, you can create additional quick steps for each action.

1. Click the **Mail** button in the Navigation Pane.
The Inbox appears.
2. Click the **Home** tab on the Ribbon and select **Create New** in the Quick Steps group.
The Edit Quick Step dialog box appears.
 - Other Ways to Open the Edit Quick Step Dialog Box:
Click the **More** button in the Quick Steps group,

& Exercise

- **Exercise File:** None required.
- **Exercise:** Customize the “Move to” quick step to move messages to the Sent Items folder.



Figure 11-1: Select a quick step or manage your quick steps from the Quick Steps group.

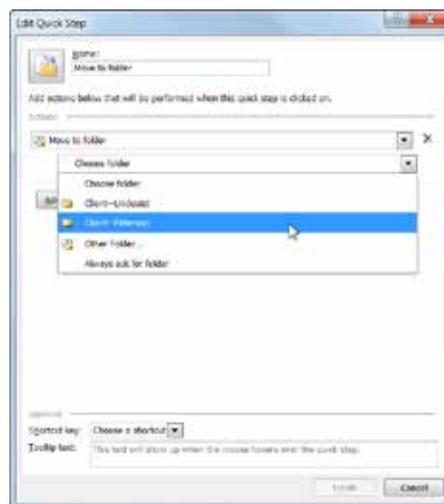


Figure 11-2: You can further specify an action in the Edit Quick Step dialog box.

select **New Quick Step** from the list, and select the type of quick step you want to create.

3. Enter a name for the quick step.

You should name a quick step based on the task it performs; for example, “To Manager” is a good name for a quick step that automatically forwards an e-mail to your manager.

4. Click the **Choose an Action** list arrow and select the action you want the quick step to do.

There are several actions you can take with a message, as explained in the table to the right, *Quick Step Actions*.

5. Enter additional options for the quick step and click **Finish**.

The new quick step has been created and appears in the Quick Steps group.

Table 11-1: Quick Step Actions

Filing	Specify the folder where you wish to store messages, move messages to the Deleted Items folder, or permanently delete messages.
Change Status	Mark a message as read or unread, or change the importance of a message.
Categories, Tasks and Flags	Categorize a message, clear a message of pre-set categories, flag a message for follow-up, or create a task.
Respond	Create a new message, reply to a message, reply to all recipients of a message, or forward a message.
Appointment	Create a meeting or appointment.
Conversation	Move or ignore all messages in a particular conversation.

Managing Quick Steps

Outlook’s new quick step feature lets you create your own shortcuts. To work efficiently, you should keep your quick steps organized and relevant. For example, you can update the To Manager quick step if your manager or supervisor changes. You can also delete irrelevant quick steps return to the default quick steps.

Modify a quick step

It’s easy to change an existing quick step. You can even duplicate a quick step and modify the copy to meet your needs.

1. Click the **Mail** button in the Navigation Pane.
2. Click the **Home** tab on the Ribbon and click the **More** button in the Quick Steps group.
A list of available quick steps appears.
3. Select **Manage Quick Steps**.
The Manage Quick Steps dialog box appears.
4. Select the quick step you want to modify under the Quick step column and click the **Edit** button.
The Edit Quick Step dialog box appears.

Other Ways to Modify a Quick Step:
Click the **Home** tab on the Ribbon and right-click the quick step you want to modify in the Quick Steps group. Select **Edit “Quick Step”** from the contextual menu.

Tip: To duplicate a quick step, click the **Duplicate** button in the Manage Quick Steps dialog box.

5. Edit the quick step as necessary and click the **Save** button.
The quick step is updated.

Delete a quick step

Delete quick steps you no longer use to keep your list of quick steps tidy.

1. Click the **Mail** button in the Navigation Pane.
2. Click the **Home** tab on the Ribbon and click the **More** button in the Quick Steps group.
A list of options appears.

& Exercise

- **Exercise File:** Practice.pst (Click the **File** tab on the Ribbon, select **Open**, and click **Open Outlook Data File**. Browse to the Outlook 2010 Practice folder and select **Practice.pst**. Click **Open**.)
- **Exercise:** Modify the To Manager quick step to forward e-mails to someone else.

Duplicate the To Manager quick step and modify it so it creates a new message. Rename it “E-mail Manager”.

Delete the E-mail Manager quick step.

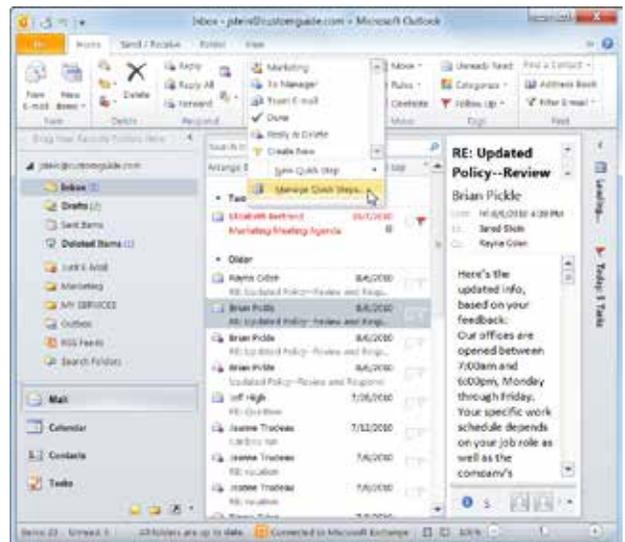


Figure 11-3: Open the Manage Quick Steps dialog box from the Quick Steps group.



Click Edit to edit the existing quick step.

Click Duplicate to copy the quick step. You can edit your new quick step.

Figure 11-4: The Manage Quick Steps dialog box.

3. Select **Manage Quick Steps**.

The Manage Quick Steps dialog box appears.

4. Select the quick step you want to delete in the Quick step section and click the **Delete** button.

The quick step is deleted.

🔴 **Other Ways to Delete a Quick Step:**

Click the **Home** tab on the Ribbon and right-click the quick step you want to delete in the Quick Steps group. Select **Delete** from the contextual menu.

Reset quick steps

You can always restore Outlook's default quick steps.

1. Click the **Mail** button in the Navigation Pane.

2. Click the **Home** tab on the Ribbon and click the **More** button in the Quick Steps group.

A list of quick step options appears.

3. Select **Manage Quick Steps**.

The Manage Quick Steps dialog box appears.

4. Click the **Reset to Defaults** button.

The Microsoft Outlook dialog box appears, asking you if you want to restore defaults.

5. Click **Yes**.

6. Click **OK**.

The original quick steps appear in the Quick Steps group on the Ribbon.



Figure 11-5: The Microsoft Outlook dialog box appears when you restore default quick steps.

Creating a Rule

Rules are powerful tools that help you manage your e-mail messages by performing specific actions automatically. When you create a rule, Outlook takes the action specified in the rule when a message arrives in your Inbox or when you send a message. You can use rules to automatically:

- **Organize your messages:** For example, move all incoming messages that have the word “Picnic” in the subject to a Picnic folder.
- **Create a notification:** Play a sound when you receive an e-mail from your boss.

There are two different ways to create a rule:

- **By example:** Create a rule based on an e-mail message. Simply select the message that contains the sender, subject, or recipient you want to use in the rule.
- **Using the Rules Wizard:** You can create a rule based on a template from the Stay Organized or Stay Up to Date collections of templates. Or, you can start with a blank rule and let Outlook walk you through the entire process of creating a rule using all your own conditions and actions.

First let’s look at the easiest way to create a rule—by example.

1. Click the **Mail** button in the Navigation Pane.
2. Click the **Home** tab on the Ribbon and click the **Rules** button in the Move group.

A list of options for creating rules appears. In Outlook 2010, options for creating Always Move rules based on sender or recipient appear by default.

If you want to create a different kind of rule, you can use the Create Rule dialog box.

3. Select **Create Rule**.

The Create Rule dialog box appears.

- **Other Ways to Create a Rule:** Right-click the message you want to base the rule on, select **Rules** from the contextual menu, and select the appropriate option or **Create Rule**.

4. Select condition(s) for the rule.

Choose from From, Subject contains, or Sent to conditions. The rule will apply only when you receive e-mail that satisfies all the selected conditions.

& Exercise

- **Exercise File:** Practice.pst (Click the **File** tab on the Ribbon, select **Open**, and click **Open Outlook Data File**. Browse to the Outlook 2010 Practice folder and select **Practice.pst**. Click **Open**.)

- **Exercise:** Create a new mail folder called “Personal”.

Use the “Soccer practice” message in the Inbox to create a rule that sends messages with Soccer practice in the subject to the Personal folder.

Run this rule now on messages already in the Inbox folder under Practice.

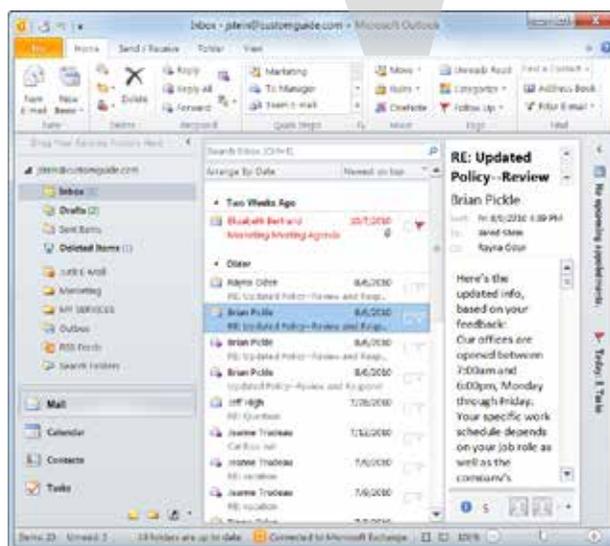
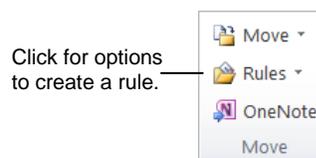


Figure 11-6: The Rules button in the Move group on the Ribbon.



Figure 11-7: The Create Rule dialog box.

Automating Commands

5. Specify the action you want to take if the condition(s) are met.

Choose from displaying an alert, playing a selected sound, or automatically moving the item to a specified folder.

✔ **Tip:** Click the **Advanced Options** button for even more condition and action options.

6. Click **OK**.

Outlook asks you to confirm the creation of the new rule.

✔ **Tip:** To apply the rule to messages you've already received, select the **Run this rule now on messages already in the current folder** check box.

7. Click **OK**.

The rule is active.



Select this check box to run the rule on messages you have already received.

Figure 11-8: The Success dialog box.

Creating a Rule with the Rules Wizard

The Rules Wizard can help you create a rule from a template or by starting with a blank rule.

1. In Mail, click the **Home** tab on the Ribbon and click the **Rules** button in the Move group.

A list of options appears.

2. Select **Manage Rules & Alerts**.

The E-mail Rules tab of the Rules and Alerts dialog box appears.

Other Ways to Open the Rules and Alerts Dialog Box:

Click the **File** tab on the Ribbon and select **Info**.
Click the **Manage Rules & Alerts** button.

3. Click the **New Rule** button.

The Rules Wizard dialog box appears. The Rules Wizard takes you through several steps to help you establish your new rule.

First you will see “Step 1: Select a template”. Here you can choose from templates in the Stay Organized or Stay Up to Date sections, or create a rule from scratch by selecting an option in the “Start from a blank rule” section.

4. Select a template or blank rule option and click **Next**.

Now you need to select which conditions you want to use.

5. Select the condition(s) you want to check.

You may also need to edit rule descriptions in the “Step 2: Edit the rule description” area at the bottom of the dialog box. For example, if the rule is going to play a sound, you need to select which sound to use.

6. If necessary, click the underlined values at the bottom of the dialog box and edit the rule descriptions. When you’re finished, click **Next** in the Rules Wizard dialog box.

Next you need to indicate what you want to do with the messages that meet the specified conditions.

& Exercise

- **Exercise File:** Practice.pst (Click the **File** tab on the Ribbon, select **Open**, and click **Open Outlook Data File**. Browse to the Outlook 2010 Practice folder and select **Practice.pst**. Click **Open**.)

- **Exercise:** Create a new Mail folder called “Meetings”.

Create a rule from scratch that will move incoming messages with the word “meeting” in the subject line into the Meetings folder.

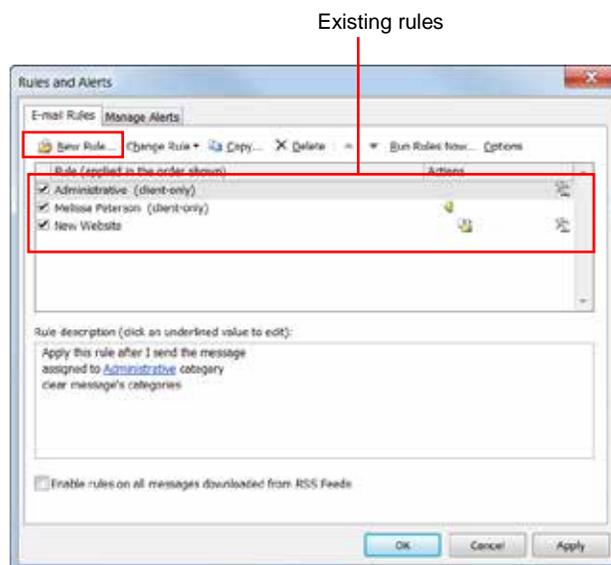


Figure 11-9: The Rules and Alerts dialog box.



Figure 11-10: The Rules Wizard dialog box.

7. Select the actions you want Outlook to perform. If necessary, define the actions at the bottom of the dialog box. Click **Next** when you're finished.
8. Specify any exceptions to the condition(s). If necessary, define the exceptions at the bottom of the dialog box. Click **Next** when you're finished.
9. Enter a name for the new rule and click **Finish**.
 - ✔ **Tip:** If you want the new rule to be applied to messages already in the folder, select that option before you click **Finish**.

Managing Rules

If you have set up several rules, it's likely that eventually you will want to change or delete some of them. You can add, delete, and manage Outlook's rules using the Rules and Alerts dialog box.

Edit a rule

1. In Mail, click the **Home** tab on the Ribbon and click the **Rules** button in the Move group.

A list of options appears.

2. Select **Manage Rules & Alerts**.

The E-mail Rules tab of the Rules and Alerts dialog box appears.

3. Select the existing rule you want to edit and click the **Change Rule** button.

A list of editing options appears. Here you can edit the rule settings, rename the rule, or change the action that is associated with the rule.

4. Select an option and finish editing the rule.

Disable a rule

Disabling a rule is different from deleting a rule because it only inactivates the rule without removing it from Outlook.

1. In Mail, click the **Home** tab on the Ribbon and click the **Rules** button in the Move group.

A list of options appears.

2. Select **Manage Rules & Alerts**.

The Rules and Alerts dialog box appears, displaying the E-mail Rules tab.

3. Uncheck the box next to a rule to disable it.

 **Tip:** Simply check the box next to a rule to enable it again.

Delete a rule

You can also completely delete a rule.

1. In Mail, click the **Home** tab on the Ribbon and click the **Rules** button in the Move group.

A list of options appears.

& Exercise

- **Exercise File:** Practice.pst (Click the **File** tab on the Ribbon, select **Open**, and click **Open Outlook Data File**. Browse to the Outlook 2010 Practice folder and select **Practice.pst**. Click **Open**.)

If necessary, create a Mail folder called "Meetings" and create a rule that will move incoming messages with the word "meeting" in the subject line into the Meetings folder.

- **Exercise:** Display the Rules and Alerts dialog box and change the "meeting" rule so it includes messages that are marked as High Priority.

Delete the "meeting" rule.

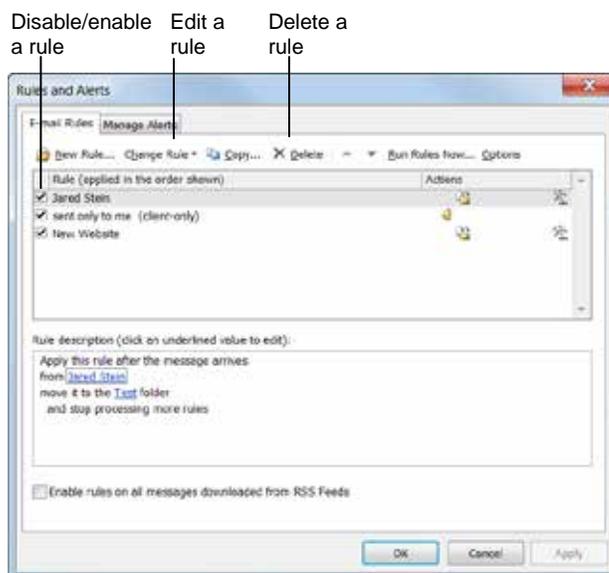


Figure 11-11: Managing rules in the Rules and Alerts dialog box.

Automating Commands

2. Select **Manage Rules & Alerts**.

The Rules and Alerts dialog box appears, displaying the E-mail Rules tab.

3. Select a rule and click the **Delete** button.

Outlook deletes the selected rule.

The table below, *Commands Available in the Rules and Alerts Dialog Box*, provides an overview of all the commands that are available in the Rules and Alerts dialog box.

Table 11-2: Commands Available in the Rules and Alerts Dialog Box

	Creates a new rule.
	Modifies the conditions, actions, and exceptions of the selected rule.
	Copies the selected rule to use as a template for a new rule.
	Deletes the selected rule.
	Move Up: If you have multiple rules this command will change the order in which rules are evaluated.
	Move Down: If you have multiple rules this command will change the order in which rules are evaluated.
	Runs selected rules on messages already in the Inbox or other folders.
	Allows you to import and export your rules. Very useful for backing up your rules and transferring them to another computer.

Automating Commands Review

Quiz Questions

126. You cannot create custom quick steps. (True or False?)
127. What should you do if you want to restore your quick step defaults?
A. Delete all the quick steps you created and recreate the default quick steps.
B. Click the Reset to Defaults button in the Manage Quick Steps dialog box.
C. You cannot reset quick steps to defaults.
D. Download an add-in from Office.com.
128. The only way to create a rule is using the Rules Wizard. (True or False?)
129. You can use the Rules Wizard to create a rule using a template or from scratch. (True or False?)
130. You can disable a rule without deleting it. (True or False?)
131. You can manage rules using the _____ dialog box.
A. Rule Manager
B. Manage Rules
C. Rules and Alerts
D. Rule Options

Quiz Answers

126. False. You can create custom quick steps.
127. B. You can restore your default quick steps by clicking the Reset to Defaults button in the Manage Quick Steps dialog box.
128. False. You can create rules by example using the Create Rule dialog box, or you can create a rule based on a template using the Rules Wizard.
129. True. You can use the Rules Wizard to create a rule using a template or from scratch.
130. True. You can disable a rule without deleting it.
131. C. You can manage rules using the Rules and Alerts dialog box.

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Where would you be if, all of a sudden, you couldn't access your Outlook files?

For many people, Outlook is an essential office tool containing a lot of precious data. Losing e-mail messages, contact information, and appointments from the calendar could be a catastrophe. If you find yourself in that category, you'll want to make sure that you can access that data even if your computer crashes.

Managing your Outlook data also means working with other programs. If you have contact names and addresses scattered throughout your Web e-mail accounts, Outlook lets you import them all into your Contacts list (or export your Contacts list to your e-mail programs).

This chapter focuses on some different ways to backup your data, as well as ways to import and export data between Outlook and other programs.

Using Mailbox Cleanup

Like a physical mailbox, your Outlook mailbox fills up over time. Knowing the size of your mailbox, the amount of free space you have, and how to clean up your mailbox helps keep things organized.

Check your mailbox

Many organizations have a limit on the size of your mailbox. Each message you save takes up valuable space. The Quota Thermometer, new in Outlook 2010, can help you manage your mailbox more effectively.

- Click the **File** tab on the Ribbon and select **Info**.
The Quota Thermometer appears under the Mailbox Cleanup heading. The Quota Thermometer provides two important pieces of information:
 - The size of your mailbox.
 - How much free space you currently have in your mailbox.
- **Trap:** The Quota Thermometer is only available to organizations using Microsoft Exchange Server 2010.

Clean up your mailbox

You should periodically empty your mailbox. Use the Mailbox Cleanup dialog box to help you empty Outlook of unnecessary or duplicate items.

1. Click the **File** tab on the Ribbon and select **Info**.
Information about your e-mail account appears.
2. Click the **Cleanup Tools** button and select **Mailbox Cleanup**.

The Mailbox Cleanup dialog box appears. Use any of the following methods to reduce the size of your mailbox:

- **View mailbox size:** Click the **View Mailbox Size** button to view the total size of your mailbox as well as the size of each folder.
- **Find items:** Search for items to delete based on their age or size.
- **AutoArchive items:** Archive old items. These items will still be available under Archive Folders in the Folder List.
- **Empty the Deleted Items folder:** View the size of your Deleted Items folder and permanently delete items.

& Exercise

- **Exercise File:** None required.
- **Exercise:** View the Quota Thermometer.

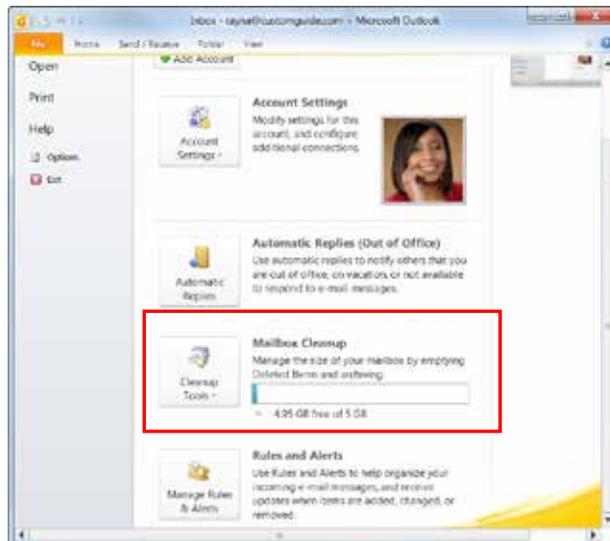


Figure 12-1: The Quota Thermometer appears on the Info tab.

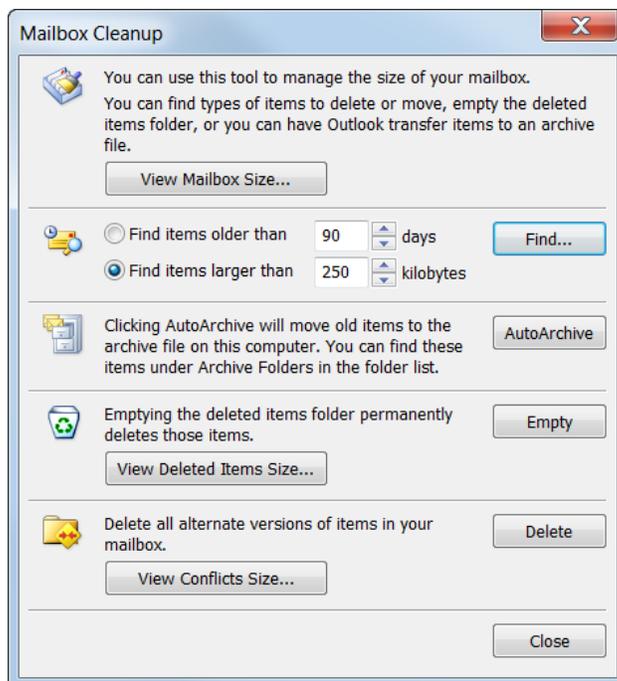


Figure 12-2: The Mailbox Cleanup dialog box.

- **Delete conflicts:** View conflicts and delete any alternative versions of items in your mailbox.
3. Select the options you wish to use and follow the prompts.
 4. When you're finished, click the **Close** button in the Mailbox Cleanup dialog box.
Your changes are applied.

Using AutoArchive

Outlook can automatically keep your Inbox and other folders from growing too unwieldy. AutoArchive automatically archives your Outlook data based on your settings. For example, you might specify that AutoArchive archives any appointments in your Calendar folder that are over four months old.

1. Click the **File** tab on the Ribbon and select **Options**.
The Outlook Options dialog box appears.

2. Click the **Advanced** tab.
Advanced options for working with Outlook appear.

3. Click the **AutoArchive Settings** button.
The AutoArchive dialog box appears.

4. Make sure the **Run AutoArchive every** check box is checked.

When AutoArchive is activated, you can specify how often you want it to archive your items. For a list of what each setting means, see the table to the right, *AutoArchive Options*.

5. Choose your preferences for AutoArchive notification and deletions using the check boxes.

Trap: If you specify a new name and location for the archive file, make sure you use the same file when you archive information in the future. Newly archived messages are just added to the existing messages, so you'll want to make sure they're all in the same place.

6. Click **OK**.
The AutoArchive dialog box closes.

7. Click **OK**.
The Outlook Options dialog box closes.

Change AutoArchive settings for a single folder

You can also change the AutoArchive settings for a single folder.

1. Click the **Folder List** button in the Navigation Pane.
The Folder List appears in the Navigation Pane.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Review the AutoArchive settings in Outlook.



Figure 12-3: The AutoArchive dialog box

Table 12-1: AutoArchive Options

Prompt before AutoArchive runs	You can receive a message every time AutoArchive is about to run.
Delete expired items	If an e-mail message has an expiration date, it can be deleted instead of archived.
Archive or delete old items	Clear this check box if you do not want to move items to the archive during AutoArchive.
Show archive folder in folder list	You can show or hide the archive folder in Outlook's folder list.
Clean out items older than	Choose how long an item must be sitting in Outlook before it is archived.
Move old items to	Choose a location for archived items other than the default location.
Permanently delete old items	Rather than moving old items to an archive, you can delete them permanently.

2. Right-click the folder you want to change and select **Properties** from the contextual menu

The Properties dialog box for the selected folder appears.

3. Click the **AutoArchive** tab.

The AutoArchive tab appears.

 **Other Ways to Change AutoArchive Settings for a Single Folder:**

Select the folder you want to change in the Navigation Pane, click the **Folder** tab on the Ribbon, and click the **AutoArchive Settings** button in the Properties group.

4. Change the settings to meet your needs and click **Apply**.

Your settings are saved for that folder. The table to the right, *AutoArchive Folder Settings*, lists the settings used if you change the AutoArchive settings in the AutoArchive tab of the Properties dialog box.

Table 12-2: AutoArchive Folder Settings

Calendar	6 months
Deleted Items	2 months
Inbox	6 months
Journal	6 months
Sent Items	2 months
Tasks	6 months
Notes, Contacts, and Drafts	AutoArchive does not normally archive information in these folders.

Manually Archiving and Retrieving Information

As your folders become larger, Outlook becomes slower, and finding items can become increasingly difficult. That is where archiving becomes useful. When you archive Outlook information, you transfer old items to a storage file. The items are then deleted from their original folder in Outlook.

Because archived items are copied to the archive file and then removed from Outlook, be cautious about what you archive. This lesson explains how to archive Outlook information manually.

1. Click the **File** tab on the Ribbon and click the **Cleanup Tools** button.

A list of options appears.

2. Select **Archive** from the list.

The Archive dialog box appears.

3. Make sure that the **Archive This Folder and all subfolders** option is selected.

This option will let you specify which folder you want to archive. If you choose the other option, “Archive all folders according to their AutoArchive settings”, every folder in Outlook (except those not set to archive) will be archived.

4. Select the folder that you want to archive.

If you want to archive everything, select **Mailbox** and all the folders will be archived.

Now choose the date at which you want to begin archiving.

5. Click the **Archive items older than** list arrow and select the how old an item must be in order to be archived.

All items older than the date specified will be moved into the archive file. Items that are newer remain in Outlook.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Archive the data in your Inbox.

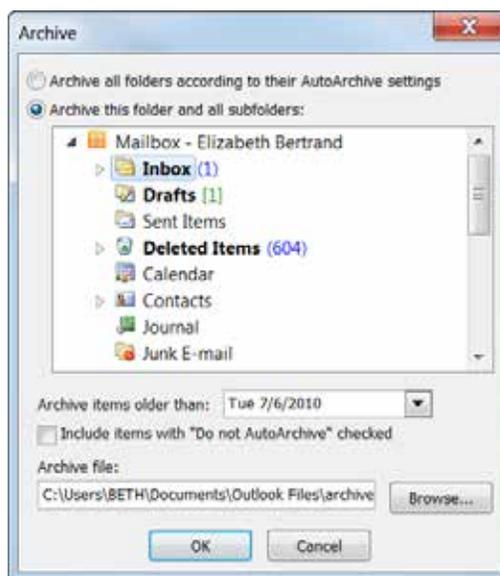


Figure 12-4: The Archive dialog box.

- (Optional) Specify the name and location of the archive file in the **Archive File** box.

The default location is a folder called Archive, and the archive is saved as an Outlook Data File (.pst).

! Trap: If you specify a new name and location for the archive file, make sure you use the same file when you archive information in the future. Newly archived items are just added to the archive, so you'll want to make sure they're all in the same place.

- Click **OK**.

The items you specified are archived.

✓ Tips

- Messages that are archived are not saved within Outlook, so they are more difficult to find. Be sure that you don't archive any items that you need immediately.

Access archived items

Your archiving system is working great. Unfortunately, you need to find an e-mail message archived two years ago. No problem – the archived items are just a few clicks away.

- Click the **Folder List** button in the Navigation Pane.

The Folder List appears in the Navigation Pane.

- Select **Archive Folders** (or the name you specified for your archived items) in the Folder List.

The archive appears.

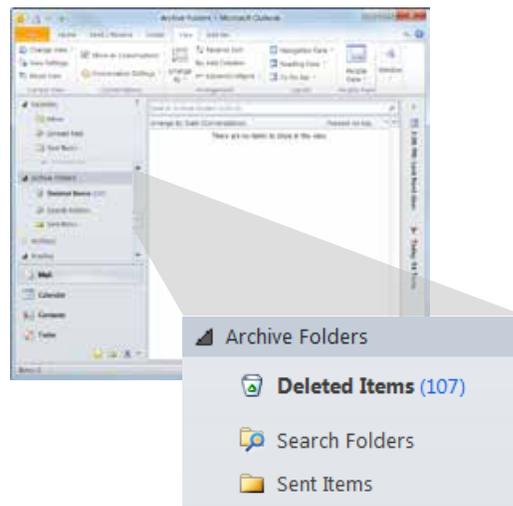


Figure 12-5: Archive Folders appear in the Folder List.

Using a Personal Folders Backup Tool

If you're not using Microsoft Exchange Server and you don't have an HTTP account like Mail, all of your Outlook data is saved as a Personal Folders File. You can use the Personal Folders Backup tool to backup all your Outlook folders and copy them onto a CD or DVD, rather than just saving them onto the server or your computer.

✓ Tips

- If you use Exchange Server, your data is not saved as a .pst file, and the Personal Folders Backup tool will not back them up.

Install the Personal Folders Backup tool

The Personal Folders Backup tool must first be downloaded from the Microsoft Download Center Web site.

1. Click the **File** tab on the Ribbon and select **Exit**. Outlook closes.
2. Open Internet Explorer and go to www.microsoft.com/downloads. The Microsoft Download Web page is displayed.
3. Search for the "Outlook 2007/2003/2002 Add-in: Personal Folders Backup" and download the file to your computer.

Follow the instructions in the dialog boxes to download the file.

- **Tip:** Save the installation file to your desktop so it is easy to find after it is downloaded.

4. Double-click the **Pfbackup.exe** program file. The setup program appears.
5. Follow the instructions to complete the installation. The program is installed.
6. Start Outlook. The Personal Folders Backup tool can be found on the Add-ins tab of the Ribbon.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Back up your Contacts list using the Personal Folders Backup tool.

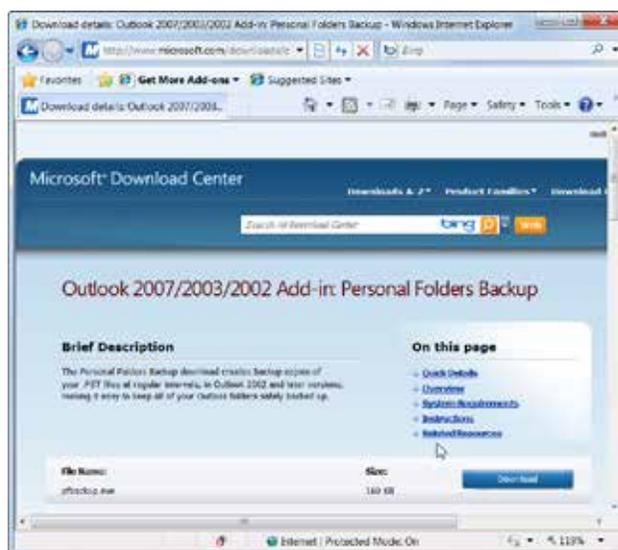


Figure 12-6: The Microsoft Download Center Web page.

Use the Personal Folders Backup tool

Once the Personal Folders Backup tool has been installed, you're ready to backup Outlook.

1. Click the **Add-Ins** tab on the Ribbon and click the **Backup** button in the Menu Commands group.

The Outlook Personal Folders Backup dialog box appears.

 **Tip:** If Backup is not listed under the Add-ins tab, make sure that the Personal Folders Backup tool was properly installed.

2. Click the **Options** button.

The Backup Options dialog box appears.

3. Enter your preferences and click **OK**.

A description of the options in the Backup Option dialog box is listed in the table to the right, *Backup Options*.

4. Click **Save Backup**.

The Outlook Personal Folders Backup dialog box closes, and the selected folders are backed up.

Open a backup copy of a Personal Folders File

If your Outlook folders are lost or otherwise unreachable, but you made a backup copy, here's how to access the backup.

1. Click the **Add-Ins** tab on the Ribbon and click the **Backup** button in the Menu Commands group.

The Outlook Personal Folders Backup dialog box appears.

2. Click **Open Backup**.

The Open dialog box appears.

3. Select the file you want to open and click the **Open** button.

The file is opened.

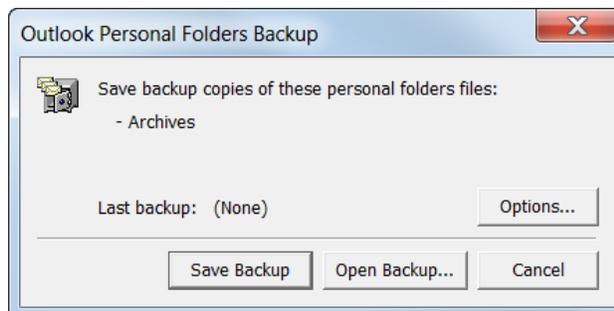


Figure 12-7: The Outlook Personal Folder Backup dialog box.

Table 12-3: Backup Options

Reminder	Choose how often you would like to receive a reminder to backup your .pst files, or clear the check box if you do not wish to receive any reminders.
Backup Files	Check the boxes next to the .pst files you would like to backup.
File Location	Choose where you would like the backed up data to be stored.

Importing Information

People from different countries speak different languages, just as computer programs save files in different formats. Fortunately, just like some people can speak several languages, Outlook can read and write in other file formats. For example, if you want to import contacts from another program, importing the file is the easiest way to do it.

Here's how to import an external file into Outlook.

1. Click the **File** tab on the Ribbon and select **Open**.

Options for opening files appear.

2. Click the **Import** button.

The Import and Export Wizard opens.

3. Select **Import from another program or file** and click **Next**.

The Import a File dialog box opens and asks which type of file to import.

4. Select the appropriate file format from the list and click **Next**.

The Import a File dialog box asks you to locate the file you wish to import.

5. Click the **Browse** button.

The Browse dialog box appears.

6. Browse to the file you'd like to import. Select the file and click **Open**.

The file path appears in the "File to import" text box.

7. Click **Next**.

The Import a File dialog box asks you to choose a destination for the file.

Tip: The most common reason to import a file is to import contact information from another source, so you'll probably want to import information into your Contacts folder.

8. Choose a destination folder from the list and click **Next**.

The last step is to make sure the information will be imported correctly.

& Exercise

- **Exercise File:** contactaddresses.csv
- **Exercise:** Import the contactaddresses.csv file into your contact list.

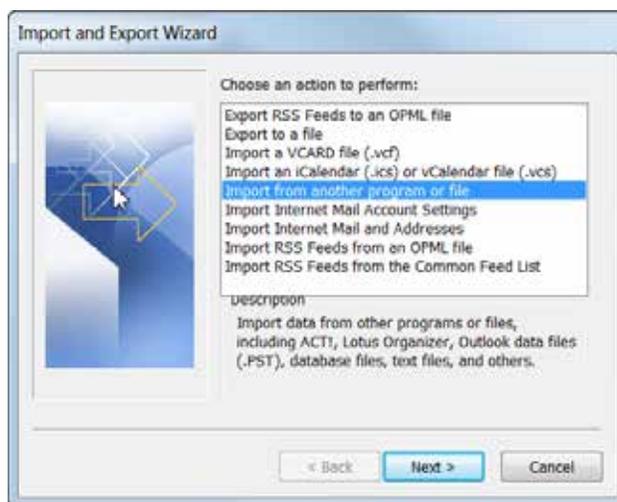


Figure 12-8: The Import and Export Wizard

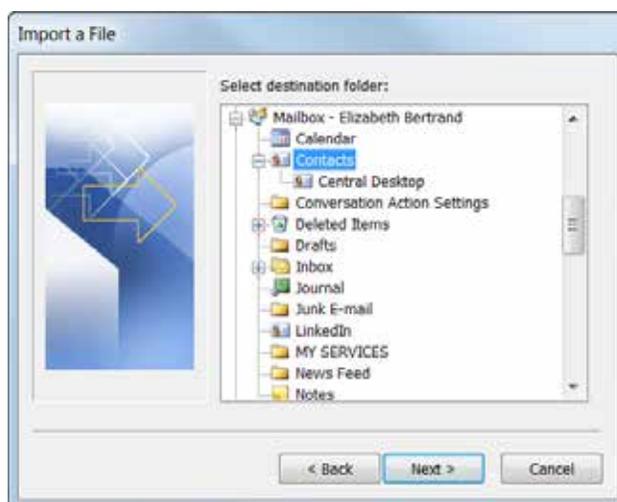


Figure 12-9: Select a location to save your imported file in the Import and Export Wizard.

9. Select the **Import** check box for the file you want to import and click the **Map Custom Fields** button.

The Map Custom Fields dialog box opens. The values in the From section are values from the file to be imported. The fields in the To section are used to categorize data in the destination folder you selected. To make sure the values are imported correctly, you must click and drag a value from the left into the field on the right.

10. Click and drag a value in the From area to a field in the To area of the dialog box.

Mapping the value for one record from the source file should automatically map the data from other records in the file.

Tip: Use the Previous and Next buttons in the From section to make sure the values are being imported correctly into Outlook.

11. Click **OK**.

The Map Custom Fields dialog box closes.

If the values are mapped to the correct destination folder, you are ready to import.

12. Click **Finish**.

The information is imported to the location you specified.

Tip

- ü The file formats that Outlook can import and export depends on which options were selected when you installed Outlook. You can always add more file formats later—just make sure you have your installation disc handy!



Figure 12-10: The Map Custom Fields dialog box lets you match fields from the imported file to the fields in the destination folder.

Exporting Information

When you export Outlook information, you save it in a different format so that it can be understood and opened by different programs. For example, you might export your Contact list to an Excel worksheet.

In this lesson, you will learn how to export information in an Outlook folder to an external file.

1. Click the **File** tab on the Ribbon and select **Open**.

Options for opening files appear.

2. Click the **Import** button.

The Import and Export Wizard opens.

Other Ways to Open the Import and Export Wizard:

Click the **File** tab on the Ribbon and select **Options**. In the Outlook Options dialog box, click the **Advanced** tab and click the **Export** button under the Export heading.

3. Select **Export to a file** and click **Next**.

The Export to a File dialog box appears, listing the formats you can export a file to.

4. Select the format you would like to save the file as and click **Next**.

A list of the folders from which you can export information appears.

5. Select the folder whose contents you'd like to export and click **Next**.

The Export a File dialog box asks you where you want to save your new file.

6. Click the **Browse** button.

The Browse dialog box appears.

7. Browse to a different location for the file, enter a name for the file if necessary, and click **OK**.

The file path appears in the "Save exported file as" text box.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Export your contact list as a Comma Separated Values (.csv) file.

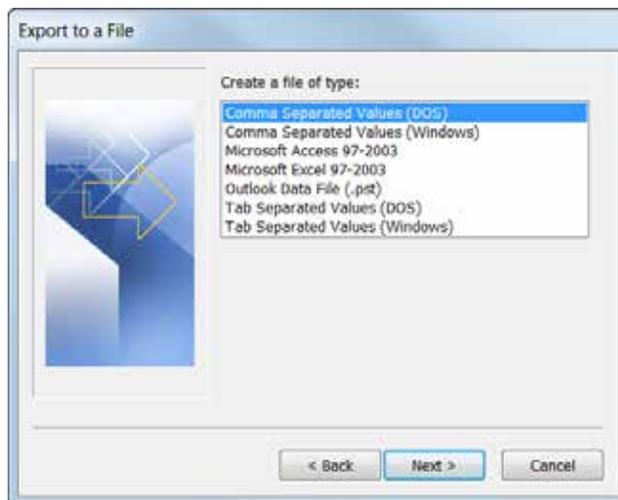


Figure 12-11: Exporting to a file using the Import and Export wizard.

8. Click **Finish**.

The steps to finish exporting your file depend on the type of file you are exporting:

- A Create Outlook Data File dialog box may appear, prompting you to add an additional password.
- The Export to a File dialog box may prompt you to map the export file's fields.

9. Follow the instructions and export your file.

Outlook exports the values to the file.

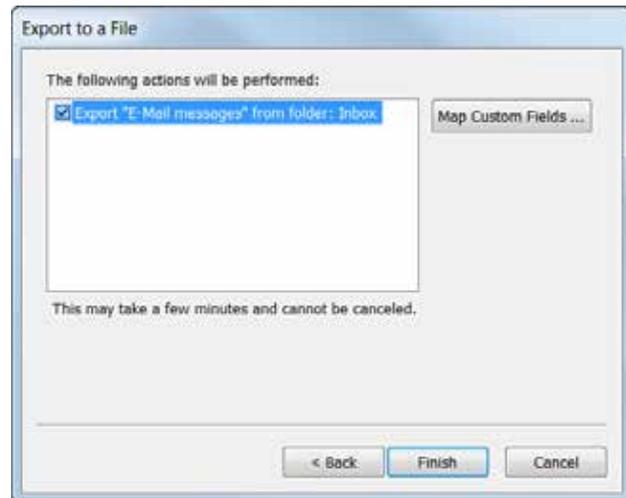


Figure 12-12: Click the Export checkbox and click finish to perform the export.

Working with Personal Folders Files

Although you may never need to do it, Outlook can open and save files. Outlook files are called Personal Folders files, have a .pst extension, and can store any kind of Outlook item—e-mails, appointments, contacts, and so on.

Create a Personal Folders file

You can use these files to back up your Outlook information or to transfer information to another computer. But first you need to create the file.

1. Click the **Home** tab on the Ribbon and click the **New Items** button in the New group.

A list of options appears.

2. Select **More Items** from the list and select **Outlook Data File**.

The Create or Open Outlook Data File dialog box appears.

 **Tip:** Select the **Add Optional Password** check box if you would like to add a password to the data file.

3. Type a name for the file in the File Name text box and click **OK**.

The data file is saved.

Open a Personal Folders file

Personal Folders files open pretty much the same as any other file. If you need to make changes to an Outlook Data file or transfer it to another computer, here's how to open it.

1. Click the **File** tab on the Ribbon and select **Open**.

Options for opening files appear.

2. Select **Open Outlook Data File**.

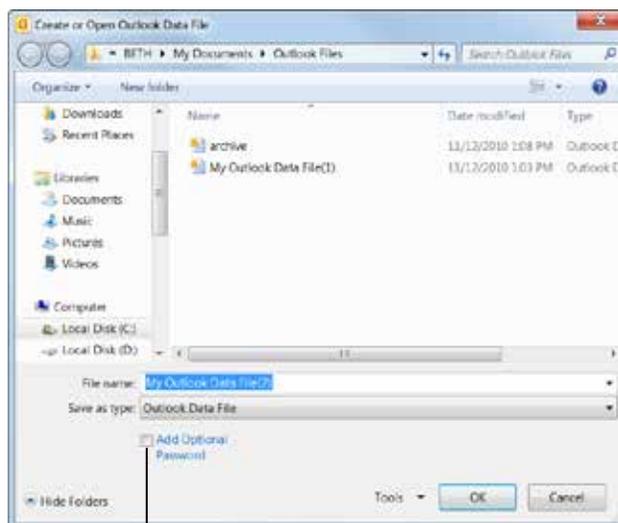
The Open Outlook Data File dialog box appears.

3. Navigate to the folder that contains the file and double-click the file.

The Personal Folders file appears in the Folder List. You might have to scroll down to the bottom of the list to see the Personal Folders file.

& Exercise

- **Exercise File:** Practice.pst
- **Exercise:** Open the Practice.pst file.
View its folder in the Folder List.
Close the Practice.pst file.



Click to add a password.

Figure 12-13: The Create Open Outlook Data File dialog box.

Close a Personal Folders file

When you're done working with a Personal Folders file in Outlook, it's a good idea to close it. Keeping additional files open in Outlook will slow down the program. When the data file is closed, the data will not be deleted. Here's how to close it.

1. Right-click the file in the Folder List.
A contextual menu appears.
2. Select **Close "filename"** from the contextual menu.
The file closes and no longer appears in the Folder List.

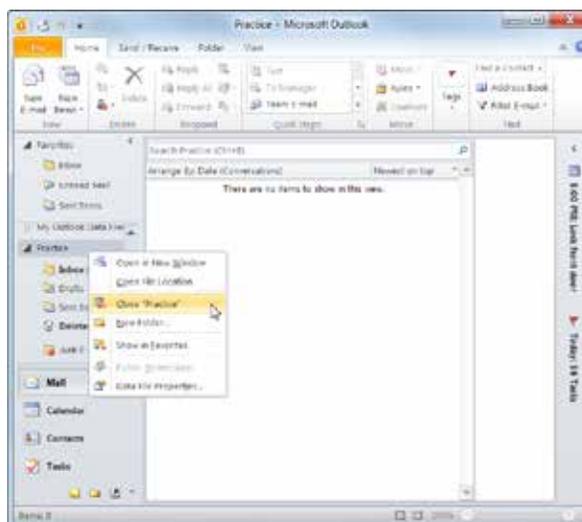


Figure 12-14: Right-click the file to close a Personal Folders file.

Working with Offline Folders

Outlook uses a second kind of data file, called an Offline Folders file (.ost). A Personal Folders File (.pst) stores your data on your hard drive. An Offline Folders file lets you make changes to Outlook while you're offline. Any changes you make to an Offline Folders file while the folders are offline are updated as soon as an Internet or network connection becomes available.

Work offline

You can use Outlook without an Internet or network connection. When you do connect, Outlook syncs the changes with the network.

- Click the **Send/Receive** tab on the Ribbon and click the **Work Offline** button in the Preferences group.
- The status bar indicates that you are working offline. Your changes will not be saved onto the network until you reconnect.

✓ Tips

- To switch back to working online, click the **Work Offline** button again.

Change folders available to edit offline

Here's how to change the folders that are updated whenever you connect to the network. The Inbox, Outbox, Deleted Items, Sent Items, Calendar, Contacts, and Tasks folders are chosen by default.

- Click the **Send/Receive** tab on the Ribbon and click the **Send/Receive Groups** button in the Send & Receive group.

A list of options appears.
- Select **Define Send & Receive Groups**.

The Send/Receive Groups dialog box appears.

Other Ways to Open the Send/Receive Groups Dialog Box:
Press **<Ctrl> + <Alt> + <S>**.
- Select the Send/Receive group that includes your Exchange account, and then click **Edit**.

The Send/Receive Settings dialog box appears.
- Select your Exchange account from the Accounts list along the left side of the dialog box.

The folder options for your account are displayed.

& Exercise

- Exercise File:** None required.
- Exercise:** Understand how to work offline in Outlook.

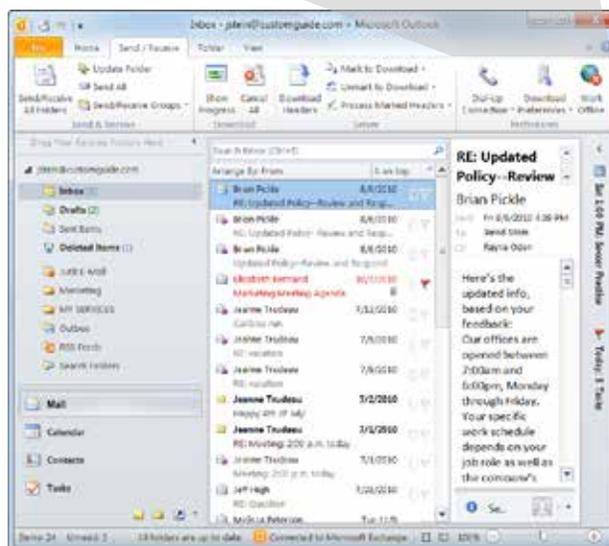
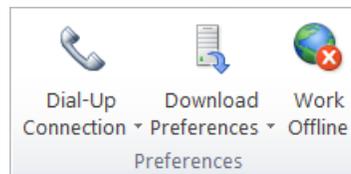


Figure 12-15: Click the Work Offline button in the Preferences group to work offline.

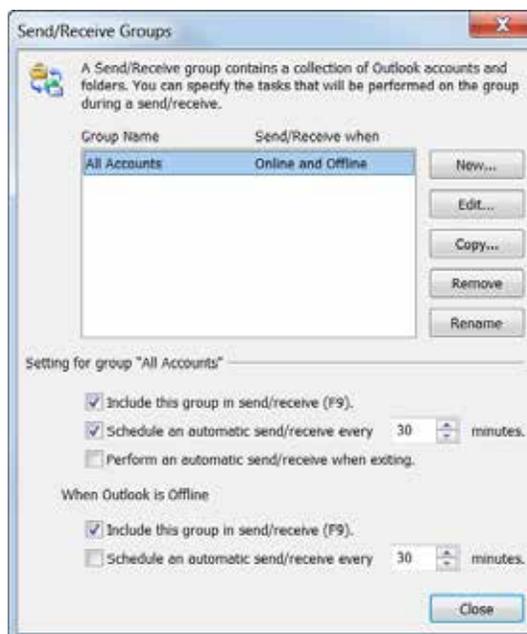


Figure 12-16: The Send/Receive Groups dialog box.

5. Select the **Include the selected account in this group** check box.

You can now select the folders you want to edit offline.

6. Click the check boxes next to the folders you would like to edit offline.

There are two ways you can work with a folder offline:

- **Download headers only:** When working offline, you will only download the subject headers of the appointment, message, or entry that you are working with.
- **Download complete item including attachments:** When working offline, you will download all available information for the appointment, message, or entry you are working with.

7. Select how you want new mail to be delivered and click **OK**.

Your new settings are applied.

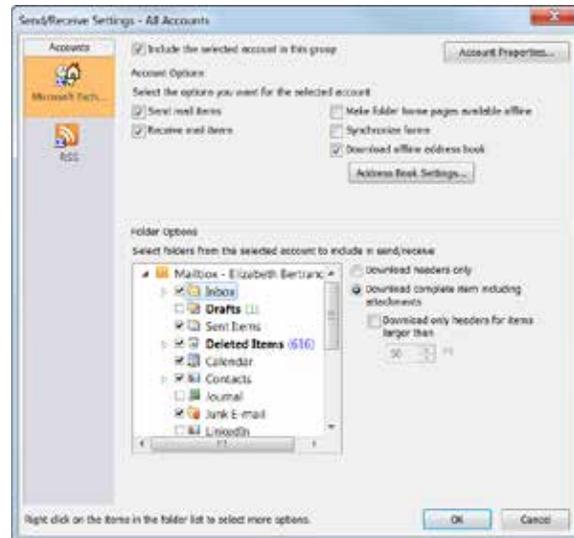


Figure 12-17: Send/Receive Settings dialog box.

Managing Outlook Data Review

Quiz Questions

132. The Quota Thermometer only tells you the size of your mailbox, not how much data it contains. (True or False?)
133. The AutoArchive button is located in the:
- A. Preferences tab of the Outlook Options dialog box.
 - B. Mail Setup tab of the Trust Center
 - C. AutoArchive tab of the Trust Center.
 - D. Advanced tab of the Outlook Options dialog box.
134. In which folder can you find archived items?
- A. Archive
 - B. Deleted Items
 - C. Journal
 - D. Archived items are removed from Outlook
135. When would you use the Personal Folders Backup tool?
- A. When you want to archive your e-mail messages.
 - B. When you want to receive download information from Microsoft.com.
 - C. When you want to save a backup copy of your Outlook files on a disk.
 - D. When you want to make Outlook load faster.
136. The Personal Folders Backup tool does not come packed in with Outlook and must be downloaded and installed. (True or False?)
137. When would you use the Import function?
- A. To move contact information from another source into your Contacts.
 - B. To read incoming e-mail in other languages.
 - C. To send your contact information from Contacts into another source.
 - D. To send an e-mail message overseas.
138. When you export information from Outlook:
- A. The information is automatically deleted from Outlook.
 - B. You can use the Outlook information in other programs.
 - C. The information can only be viewed when Outlook is running on the computer.
 - D. You need to pay an exporting fee.
139. What kind of files can be saved as Outlook data files?
- A. All files in Outlook, including e-mail messages, tasks, appointments, and journal entries.
 - B. Just journal entries and e-mail messages.
 - C. Journal entries only
 - D. Just e-mail messages.
140. You can assign a password to protect a new Outlook Data file. (True or False?)

141. When you use Outlook offline, your changes are updated when you reconnect. (True or False?)

Quiz Answers

132. False. The Quota Thermometer tells you the size of your mailbox and how much data it contains.

133. D. The AutoArchive button is located in the Advanced tab of the Outlook Options dialog box.

134. A. Archived items are stored in the Archive folder.

135. C. Use the Personal Folders Backup tool when you want to save a backup copy of your Outlook files on a disk.

136. True. The Personal Folders Backup tool does not come packed in with Outlook and must be downloaded and installed.

137. A. The most common reason to import a file is to move contact information from another source into your Contacts.

138. B. When you export information from Outlook, you can use the Outlook information in other programs.

139. A. All files in Outlook, including e-mail messages, tasks, appointments, and journal entries, can be saved as Outlook Data files.

140. True. You can choose to assign a password to protect a new Outlook Data file.

141. True. When you use Outlook offline, your changes are updated when you reconnect.

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If you'd like to wield a little more control over the way things work in Outlook, this is your chapter. You can change the way things look and the way things work in Outlook, including creating your own menus, buttons, methods for sorting, and e-mail options. You can even make Outlook start automatically every time you turn on your computer. This chapter goes through a variety of ways to tweak Outlook so it works exactly how you want it to.

Customizing the Ribbon

One of the most useful features in Office 2010 is that you can customize the Ribbon. Add your own tabs and groups, or rearrange the Ribbon to better fit your work style.

Create a new tab or group

You can add new groups to existing tabs, or you can create new tabs with new groups.

1. Click the **File** tab on the Ribbon and select **Options**.

The Outlook Options dialog box appears.

2. Click the **Customize Ribbon** tab.

The left column displays commands that you can add to the Ribbon.

The right column displays the tabs on the Ribbon, and the groups and commands in each tab.

Tip: Click the plus sign next to a tab or group to expand it.

3. In the right column, select the tab where you wish to add the new tab or group.

A new tab, which automatically includes a new group, will be inserted below the selected tab.

Trap: Each Outlook module has its own Home tab.

4. Click the **New Tab** or the **New Group** button.

The new tab or group is added.

Rename a tab or group

Once you've created a tab or group, give it a name.

1. Select the tab or group you want to rename and click the **Rename** button.

The Rename dialog box appears.

2. Enter a name for the selected tab or group in the Display Name text box.

The tab or group is renamed. For a group, also select a symbol to represent the group.

3. Click **OK**.

The tab or group is renamed.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Create a new group on the Home tab of the Ribbon in the Mail module called "Printing" and include the Print command.
Restore the Ribbon defaults.

Click to reorder the selected tab or group.

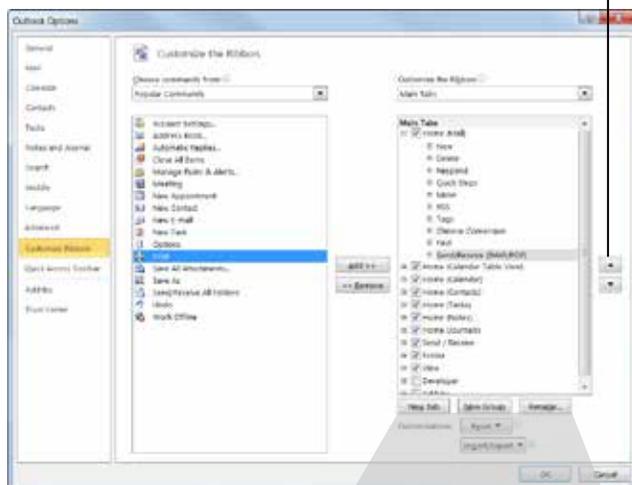


Figure 13-1: Use the buttons in the Options dialog box to add a new tab or group to the Ribbon.

New Tab **New Group** **Rename...**

Click to create a new tab.

Click to create a new group.

Click to rename the selected tab or group.

Add a command to a group

Once you have created a new tab or group, you can add commands to the group. You can also add commands to groups that already appear on the Ribbon.

1. In the right column, select the group to which you want to add a command.

This could be a group you've created from scratch or a group that appears by default.

2. In the left column, select the command you want to add to the Ribbon. Click the **Add** button.

The command is added to the group.

- ✔ **Tip:** Not finding the command you want to add? Click the **Choose commands from** list arrow and select the group of commands you want to view.

Restore the default Ribbon

If you no longer want to use the customizations you've added to the Ribbon, you can restore the Ribbon to its original, default settings.

1. Click the **Reset** button.

Two options appear:

- **Reset only selected Ribbon tab:** Restores the default settings for the selected tab.
- **Reset all customization:** Removes all Ribbon and Quick Access Toolbar customizations, restoring them to the default arrangement and appearance.

2. Select the reset option you wish to use.

The Ribbon is restored to its default settings.

Remove a tab or group

You can also remove a specific tab or group from the Ribbon.

1. In the right column, right-click the tab or group you wish to use.
2. Select **Remove** from the contextual menu.

The tab or group is removed from the Ribbon.

✔ Tips

- ü Any changes you make to a program's Ribbon will appear only in that program.
- ü To hide a tab on the Ribbon, deselect its check box.

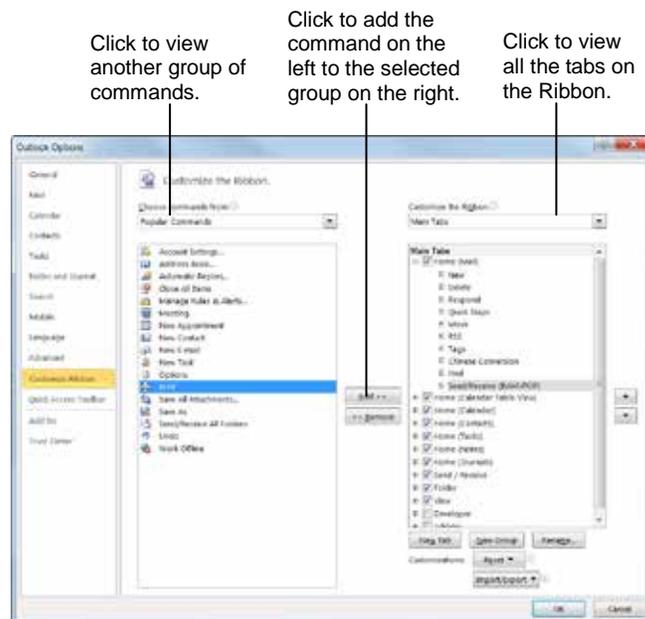


Figure 13-2: Adding commands to groups on the Ribbon.

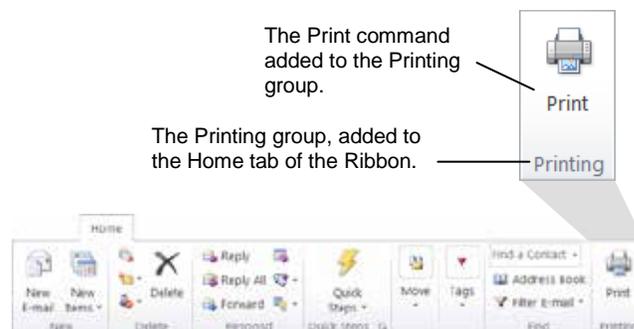


Figure 13-3: The Home tab on the Ribbon, customized with a new group.

Customizing the Quick Access Toolbar

The Quick Access Toolbar is a shortcut for commands that are used often. If the Quick Access Toolbar doesn't contain enough of your frequently used commands, you can customize it by adding or deleting commands.

1. Click the **File** tab on the Ribbon and select **Options**.
The Outlook Options dialog box appears.

2. Click the **Quick Access Toolbar** tab.
This tab displays options for customizing the Quick Access Toolbar.
The left column displays commands you can add to the Quick Access Toolbar. The right column displays commands that appear there.

3. In the left column, select the command you want to add to the Quick Access Toolbar.

4. Click the **Add** button.
The command is added to the Quick Access Toolbar.

✓ Tips

- ü Arrange the order in which the commands are displayed by clicking the **Move Up** and **Move Down** buttons to the right of the column.
- ü Click the **Reset** button and select **Reset only Quick Access Toolbar** to return the Quick Access Toolbar to its default commands.
- ü Select a command in the Quick Access Toolbar column and click the **Remove** button to remove it from the Quick Access Toolbar.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Add the Print command from the Popular Commands group to the Quick Access Toolbar.
Move the Quick Access Toolbar below the Ribbon.

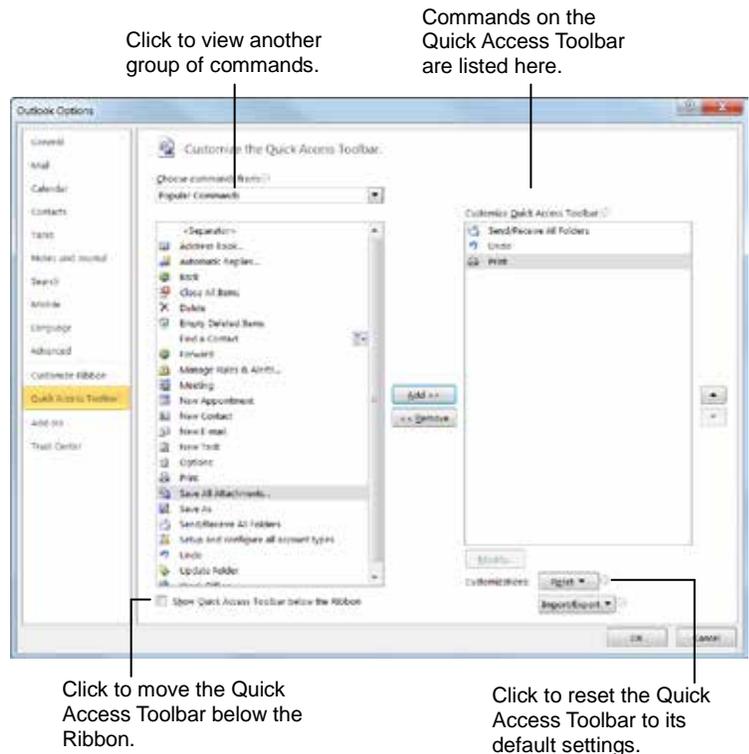


Figure 13-4: Adding a command to the Quick Access Toolbar.

Using and Customizing AutoCorrect

AutoCorrect automatically corrects many common typing and spelling errors as you type. It is also a great way to use shorthand for longer words, phrases, or symbols.

AutoCorrect is a feature that is shared across the Microsoft Office suite—so any additions or changes you make to AutoCorrect in one program, such as Outlook, will appear in all Microsoft Office programs, like Excel, PowerPoint, and Word.

How AutoCorrect works

You may have already noticed that sometimes your typos are corrected as you enter text in Outlook. When you type an AutoCorrect entry and then press the <Spacebar> key, AutoCorrect replaces that text with the correct text.

For example, AutoCorrect will change the mistyped words “hte” to “the”, or “adn” to “and”. AutoCorrect also corrects simple grammar mistakes, such as capitalization problems. For example, it would change “GOing” to “Going,” or capitalize the first letter in sentences.

Create an AutoCorrect entry

Outlook already has many entries in AutoCorrect, but you can add your own entries to correct habitual misspellings, quickly insert a symbol, or insert a shorthand version of a long phrase that you frequently use.

1. Click the **File** tab on the Ribbon and select **Options**.

The Outlook Options dialog box appears.

2. Click the **Mail** tab.

Options for working with Mail appear.

3. Click the **Editor Options** button.

The Editor Options dialog box appears, displaying options for how Outlook corrects and formats text.

Other Ways to Open the Editor Options Dialog Box:

Click the **Spelling and Autocorrect** button.

4. Click the **AutoCorrect Options** button.

The AutoCorrect dialog box appears with the AutoCorrect tab in front.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Create an AutoCorrect entry that replaces “ot” with “to”.

Try the AutoCorrect entry with this phrase, “He was going ot the store.”

He was going ot½



Press <Spacebar>

He was going to ½

Figure 13-5: An example of how AutoCorrect works.

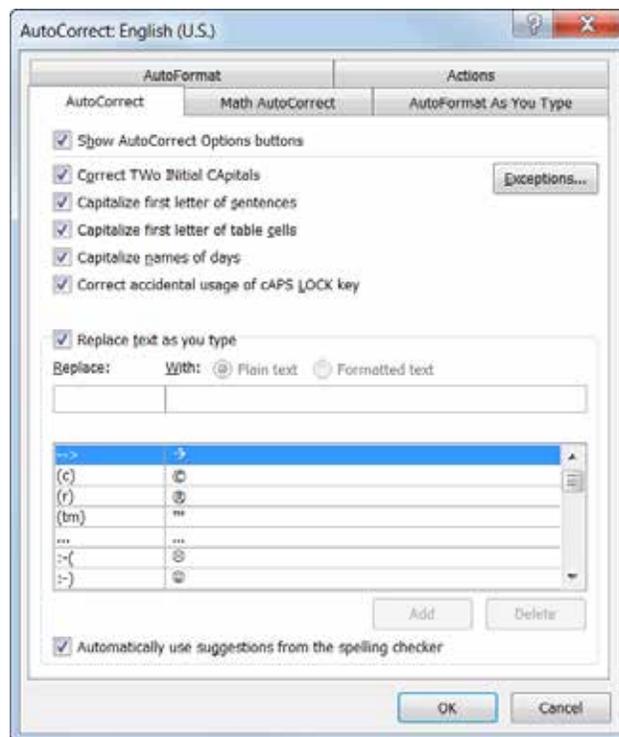


Figure 13-6: The AutoCorrect tab of the AutoCorrect dialog box.

5. Type the word or phrase you want to correct or use as shorthand in the **Replace** text box.

This is the text that AutoCorrect will recognize when you type.

6. Type the word or phrase you want to appear in the **With** text box.

When the text in the “Replace” text box is typed with a space, the text in the “With” text box will appear.

7. Click **Add**.

The entry is added to the AutoCorrect list.

8. Click **OK** to close the AutoCorrect dialog box. Click **OK** to close the Editor Options dialog box and click **OK** to close the Outlook Options dialog box.

The dialog boxes closes, and the entry will now be available in all Outlook items as well as in all other Office applications.

Customizing Outlook Today

Outlook Today is a useful view that summarizes your e-mail messages, upcoming Calendar events, and tasks. Although Outlook Today is not the default view for Outlook, it is easy to access and customize.

Open Outlook Today

You can open Outlook Today from the Mail folder, or the Folder List in the Navigation Pane.

- Select your **e-mail address** or **name** at the top of the Folder List.

Outlook Today appears.

Customize Outlook Today

You can customize Outlook Today by changing when it opens, what kind of information it displays, and how the information is displayed.

1. Select your **e-mail address** or **name** at the top of the Folder List.

Outlook Today appears, as shown in the example to the right.

2. Click the **Customize Outlook Today** link.

The Customize Outlook Today settings appear. You can customize Outlook today using the settings explained in the table, *Outlook Today Settings*.

3. Change your Outlook Today settings as necessary and click the **Save Changes** link.

Outlook Today updates to reflect your changes.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Change the Outlook Today settings so that Outlook Today only displays Today's tasks.

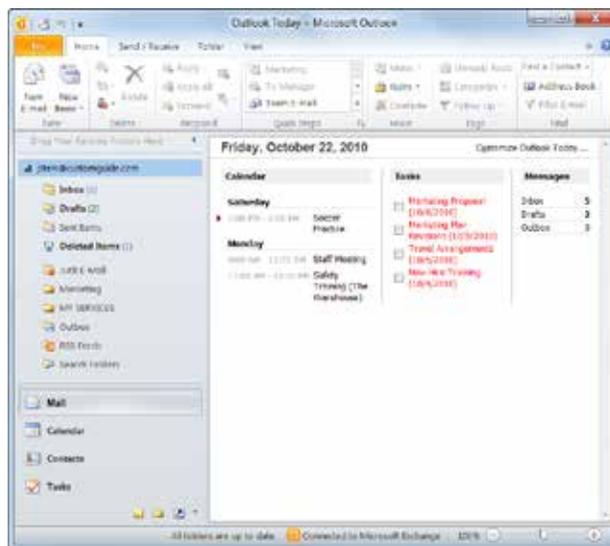


Figure 13-7: Outlook Today displays a brief summary of messages, appointments and meetings, and tasks.

Table 13-1: Outlook Today Settings

Startup	Select this check box if you want to see Outlook Today when you open Outlook.
Messages	Change the folders that Outlook Today displays.
Calendar	Increase or decrease the number of days Outlook displays appointments and Calendar events.
Tasks	Specify if you want all tasks displayed or only the current day's tasks. Also specify how you want Outlook Today to sort your tasks.
Styles	Select the style you want Outlook Today to use. This includes changing the number of columns Outlook Today uses to display information as well as the color scheme.

Starting Outlook Automatically

Every time you turn on your computer, day or night, your automatic reaction is to open Outlook. Sound familiar? If you're tired of waiting the extra time for Outlook to load, you can make it run automatically whenever you start your computer.

1. Click the **Start** button and select **All Programs** from the menu.

The list of programs and program folders that are available on your computer appears.

2. Right-click the **Startup** folder and select **Open** from the contextual menu.

The Startup folder window appears, displaying shortcuts to any programs that appear when the computer starts.

3. Click the **Start** button and select **All Programs**  **Microsoft Office** from the menu.

The contents of the Microsoft Office folder appear in the left pane of the menu.

 **Tip:** If the Outlook 2010 shortcut is not visible, it may have been placed into a subfolder by someone else. Talk to your instructor or network administrator if you cannot see the shortcut.

4. Press the **<Ctrl>** key, and click and drag the **Microsoft Outlook 2010** shortcut to the Startup folder window.

The Microsoft Outlook 2010 shortcut appears in the Startup folder. Outlook will now open automatically when the next time you start your computer.

Tips

- ü Use this feature sparingly. The more programs that load automatically during startup, the longer it will take your computer to start.

Change the folder that Outlook starts in

If you use Outlook as a day planner more than as an e-mail service, you may want Outlook to open right to the Calendar folder instead of to your Inbox. It's easy to change the folder Outlook opens when you start the program.

1. Click the **File** tab on the Ribbon and select **Options**.

The Outlook Options dialog box appears.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Move Outlook into the Startup folder so it starts automatically when you turn on your computer.
Change the folder Outlook opens when starting to Calendar.

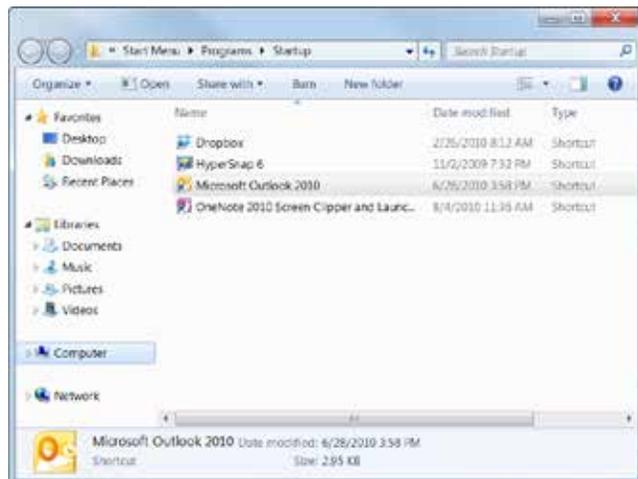


Figure 13-8: The Microsoft Outlook 2010 shortcut appears in the Startup folder.

Customizing Outlook

2. Click the **Advanced** tab.

Advanced options for working with Outlook appear.

3. Click the **Browse** button under the “Outlook start and exit” heading.

The Select Folder dialog box opens.

4. Select the folder you want Outlook to open to.

The folder is highlighted.

5. Click **OK**.

The Select Folder dialog box closes.

6. Click **OK**.

The Outlook Options dialog box closes.

The next time you start Outlook, the folder you selected will be displayed immediately.

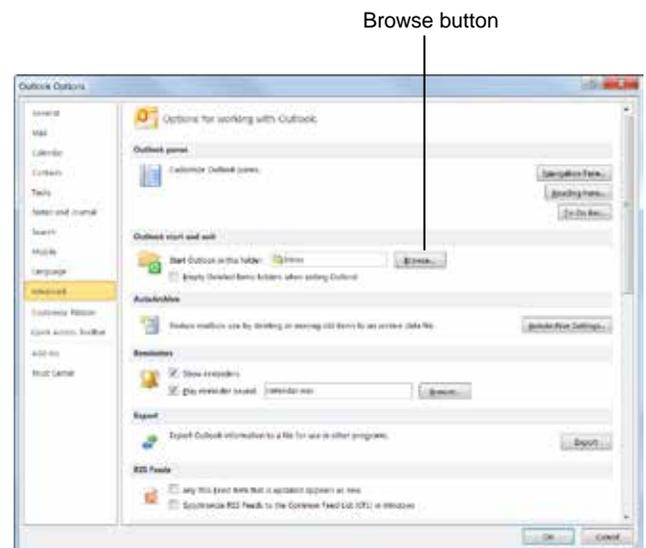


Figure 13-9: The Advanced tab of the Outlook Options dialog box.

Adding Fields to a View

When you're viewing items in any of Outlook's tools, you may need to see additional information that isn't normally displayed. For example, the Tasks's Simple List view displays the Task Subject, Due Date, Categories, In Folder, and Flag fields. If you want to see additional fields, such as the % complete field, you would have to do one of the following:

- Open the item you want to view by double-clicking it. The problem with this approach is that you can view only one item at a time.
- Select a different view. The problem with this approach is there may not be a view that includes the field(s) you want to view.
- Add the field to the current view.

This lesson focuses on the last option—adding and removing fields to and from a view.

Add a field

1. Right-click a column heading and select **Field Chooser** from the contextual menu.

The Field Chooser appears.

Trap: The Field Chooser is not available for all views.

2. Click and drag the desired field from the Field Chooser onto the column heading bar.

The view is updated to include data from the added field.

Remove a field

You can easily remove a field that you previously added.

- Click and drag the field from the column heading. The field is removed from the view and the column heading.

& Exercise

- **Exercise File:** Practice.pst (Click the **File** tab on the Ribbon, select **Open**, and click **Open Outlook Data File**. Browse to the Outlook 2010 Practice folder and select **Practice.pst**. Click **Open**.)
- **Exercise:** Add the % Complete field to Simple List view in Tasks.
Remove the % Complete field.

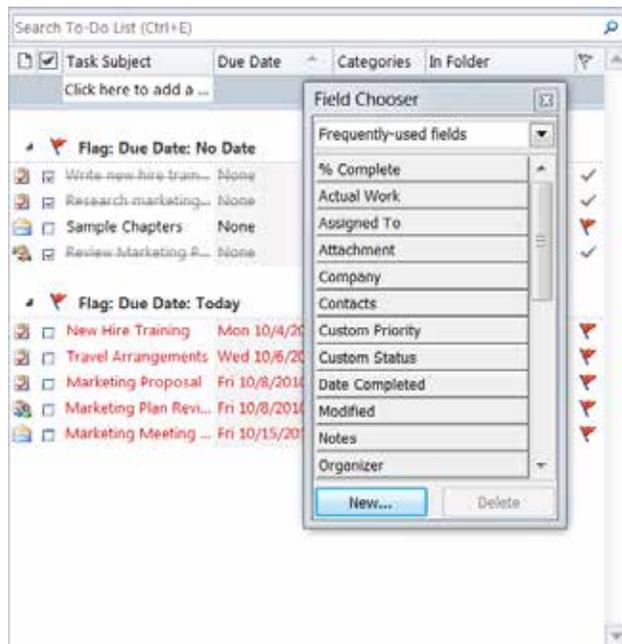


Figure 13-10: Click and drag a field from the Field Chooser to add it to the current view.

Creating a Custom View

Changing fields, sorting options, and filtering a particular folder can get very old, very fast. You can save the displayed fields, grouping and sorting options, and filter criteria so you don't have to change them manually by creating a custom view.

Create a custom view

1. Click the **View** tab on the Ribbon and click the **Change View** button in the Current View group.

A list of options appears.

2. Select **Manage Views** from the list.

The Manage All Views dialog box appears. Here you can create, modify, rename, and delete views.

Tip: You can also copy an existing view and modify it. Select the view you want to copy and click the **Copy** button. Once you've copied the view, click the **Modify** button to edit your new view.

3. Click the **New** button.

The Create a New View dialog box appears.

4. Enter a name for the view in the "Name of new view" text box.

You should now decide what type of view you want to create. This will determine if the information is displayed in a table, in a timeline, as cards, as business cards, in a calendar (Day/Week/Month), or as icons.

5. Select the type of view you want to use.

Now select if you want the view to be available to anyone using the folder, to only you when you use the folder, or in all Mail and Post folders.

6. Select what folders this view can be used on and click **OK**.

The Advanced View settings dialog box appears. Here you can further customize your view by adding columns, grouping items, specifying how you want information to be sorted, and more.

Trap: The buttons available in the Advanced View Settings dialog box depend on the type of view previously selected.

& Exercise

- **Exercise File:** Practice.pst (Click the **File** tab on the Ribbon, select **Open**, and click **Open Outlook Data File**. Browse to the Outlook 2010 Practice folder and select **Practice.pst**. Click **Open**.)
- **Exercise:** Create a new view in Contacts and apply the view.
Name: TDS
Type of view: Table
Filter: "TDS Telecom" in company field only
 Delete the view after applying it.

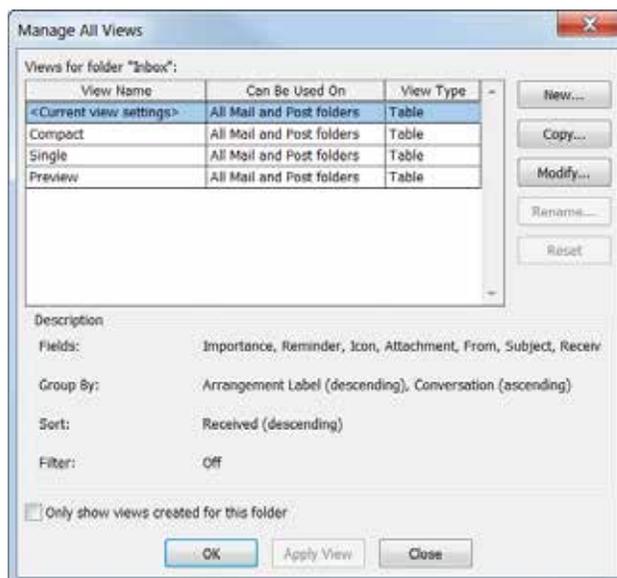


Figure 13-11: The Manage All Views dialog box.

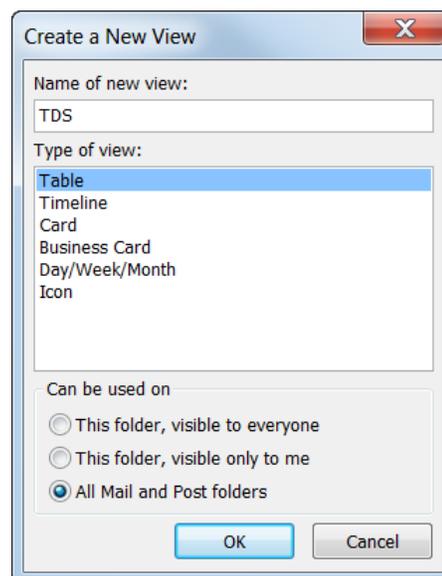


Figure 13-12: The Create a New View dialog box.

Customizing Outlook

7. Use the customize buttons to determine what appears in your custom view and how it is displayed. Click **OK**.

The Advanced View settings dialog box closes, and you return to the Manage All Views dialog box.

8. Click **Apply View**.

The custom view is applied.

Apply a custom view

Once a custom view has been created, applying it is just like applying any other view.

1. Click the **View** tab on the Ribbon and click the **Change View** button in the Current View group.

A list of options appears.

2. Select the view you want to use.

Outlook displays the items in the selected custom view.

Delete a custom view

You can delete a view if you no longer need to use it.

1. Click the **View** tab on the Ribbon and click the **Change View** button in the Current View group.

A list of options appears.

2. Select **Manage Views**.

The Manage All Views dialog box appears.

3. Select the view you want to delete and click the **Delete** button.

A dialog box appears asking you to confirm the deletion.

4. Click **Yes**.

The dialog box closes, and you return to the Manage All Views dialog box.

5. Click **Close**.

The view is deleted.

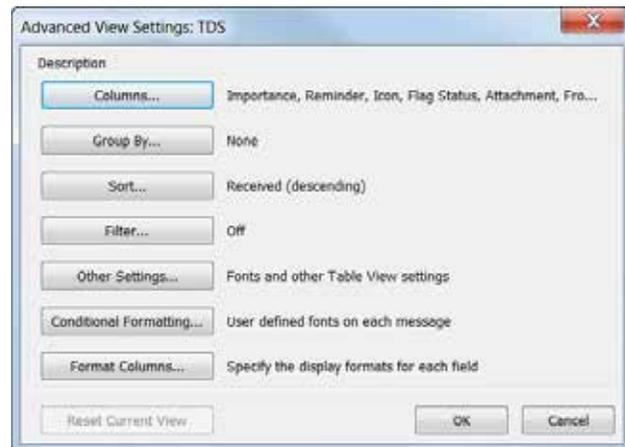


Figure 13-13: Use the Advanced View Settings to customize a new view.

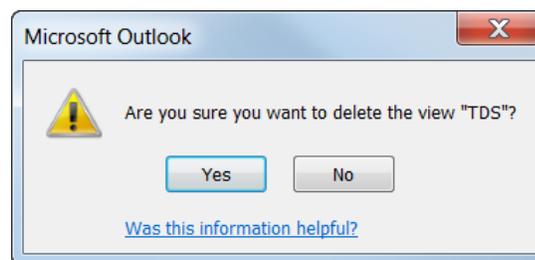


Figure 13-14: Click “Yes” to confirm the deletion of the view.

Using Custom Groups

Grouping items organizes them into a grouped outline. You can expand or collapse a group to display or hide its items.

Many views already have default groupings, but you can change those groupings to meet your needs.

1. Click the **View** tab on the Ribbon and click the **View Settings** button in the Current View group.

The Advanced View Settings dialog box appears.

2. Click the **Group By** button.

The Group By dialog box appears. You can now specify how you would like items in a view to be grouped.

✔ **Tip:** Some views automatically group items. If necessary, deselect the **Automatically group according to arrangement** check box to manually group items in a view.

3. Click the **Group items by** list arrow and select how you would like to view items.

You can add additional criteria to make groups even more specific.

4. If necessary, continue editing the options in the Group By dialog box to refine your view.

5. Click **OK**.

The Group By dialog box closes, and you return to the Advanced View Settings dialog box.

6. Click **OK**.

The new arrangement is applied to the view.

✔ **Tips**

- ü If you will reuse your custom grouping, save it as a new view.
- ü You can only group items in a table or timeline.

& Exercise

- **Exercise File:** Practice.pst (Click the **File** tab on the Ribbon, select **Open**, and click **Open Outlook Data File**. Browse to the Outlook 2010 Practice folder and select **Practice.pst**. Click **Open**.)
- **Exercise:** Group the Tasks list by Categories in Detailed List view.



Figure 13-15: Edit groups using the Advanced View Settings dialog box.



Figure 13-16: Specify how you want to group items in a view in the Group By dialog box.

Changing Outlook's Default Options

Microsoft spent a lot of time and research when it decided what the default settings for Outlook should be. However, you may find that the default settings don't always fit your own needs.

This lesson isn't so much an exercise as it is a reference on how to customize Outlook by changing its default settings.

1. Click the **File** tab and select **Options**.

The Outlook Options dialog box appears.

2. Click the tabs on the left to view different option categories.

See the table below, *Tabs in the Outlook Options Dialog Box*, for more information on these categories.

3. Change the options as you see fit. Click **OK** to confirm the changes.

The changes are applied to the Outlook program.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Explore the tabs in the Outlook Options dialog box.

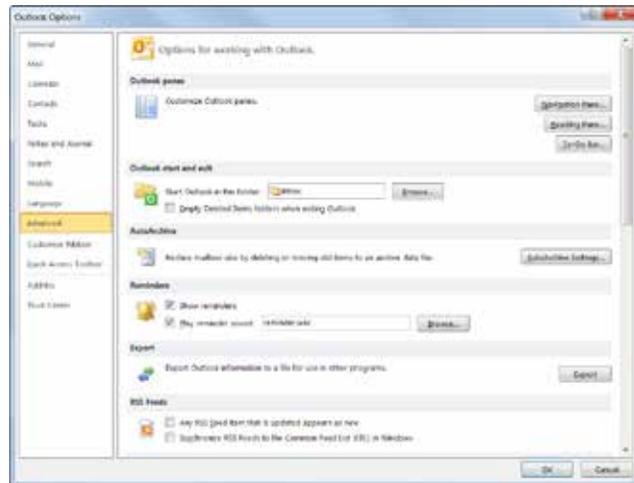


Figure 13-17: The Advanced tab of the Outlook Options dialog box.

Table 13-2: Tabs in the Outlook Options Dialog Box

General	Change the most commonly modified options in Outlook. This includes enabling the Mini Toolbar and Live Preview. Change the color scheme, control ScreenTips, and change the user name. Also designate Outlook as the default program for E-mail, Contacts, and Calendar.
Mail	Change the options for outgoing messages, including new messages, replies, and forwards; specify Outlook's Conversation Clean Up and message alert settings; change how Outlook saves messages and tracks messages.
Calendar	Change the default work time and week; configure how the calendar handles appointments, meeting requests, and reminders; change how the Calendar is displayed; change the time zone and add alternate time zones.
Contacts	Indicate how you want Outlook to file your contacts, if you want pictures and online status displayed when viewing contacts, and if you want Outlook to automatically add e-mail addresses for recipients not in your Outlook Address Book to your Contacts list.
Tasks	Change the default reminder time and how tasks appear.
Notes and Journal	Configure the appearance of your Notes and additional Journal Options.
Search	Configure the Outlook stores indexed by Windows Search. Change how results display.
Mobile	Configure Outlook to work with your mobile device.
Language	Add additional languages to edit your items. Also set the language priority order for added languages.

Table 13-2: Tabs in the Outlook Options Dialog Box

Advanced	Advanced options for working with Outlook. Customize the Navigation Pane, Reading Pane, and To-Do Bar; specify the folder Outlook should open to when starting and what should happen to items in the Deleted Items Folders when you exit Outlook; update AutoArchive settings; configure reminders; create an export file; manage your RSS feeds; configure send and receive settings for incoming and outgoing items; work with custom forms options; specify how you want Outlook to work with a dial-up connection; select international options.
Customize Ribbon	Create custom tabs and groups for the Ribbon.
Quick Access Toolbar	Add commands to the Quick Access Toolbar.
Add-Ins	View and manage Microsoft Office add-ins, such Acrobat PDFMaker and custom XML data.
Trust Center	Help keep your document safe and your computer secure and healthy. Read privacy statements and change Trust Center Settings to control how Outlook works with macros, add-ins, the message bar, trusted publishers and locations, and more.

Managing Accounts

You can use Outlook 2010 work with multiple e-mail accounts, organize your RSS feeds, subscribe to Internet calendars, and even publish your own calendar to the Internet. You can use the Account Settings dialog box to manage all these accounts and more.

1. Click the **File** tab on the Ribbon and click the **Account Settings** button.

A list of options appears.

2. Select **Account Settings**.

The E-mail tab of the Account Settings dialog box appears.

There are a few options here that you can use to change how your accounts are used. See the table to the right, *Account Settings Options*, for a brief description of your options.

3. Select the options you want to apply and click **OK**.

The dialog box closes, and the changes are applied.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Explore the tabs in the Account Settings dialog box.

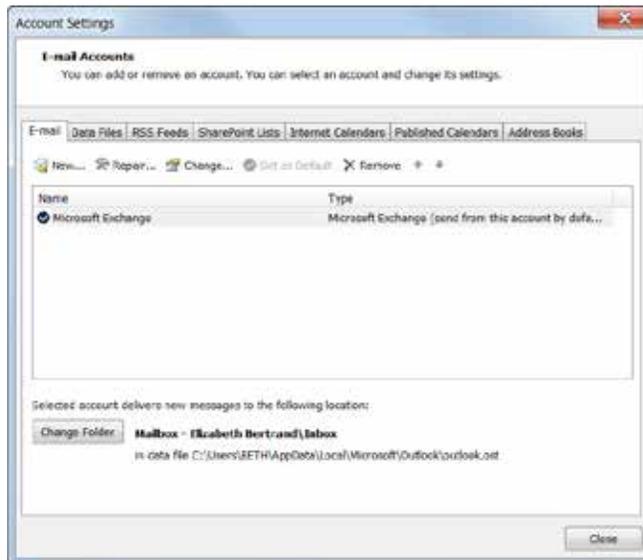


Figure 13-18: The Account Settings dialog box.

Table 13-3: Account Settings Options

E-mail Accounts	Set up a new e-mail account.
Data Files	Change settings for data files.
RSS Feeds	Add or remove Really Simple Syndicated (RSS) feeds.
SharePoint Lists	Manage your SharePoint lists.
Internet Calendars	Add or remove subscriptions from Internet calendars.
Publish Calendars	Manage any calendared published to the Internet.
Address Books	Add or remove any directories or address books.

Customizing Outlook Review

Quiz Questions

142. You can only add custom groups to custom tabs. (True or False?)
143. What is the purpose of the Quick Access Toolbar?
A. To provide quick access to the commands you use most frequently.
B. To make Outlook 2010 look more like previous versions.
C. To provide Microsoft Access commands in the Outlook program.
D. To provide a backup in case the Ribbon fails
144. AutoCorrect changes:
A. Spelling errors
B. Grammar errors
C. Capitalization errors
D. All of these.
145. AutoCorrect entries created in Outlook will not appear in any other programs. (True or False?)
146. You cannot change the folder Outlook opens when starting. (True or False?)
147. Which folder do you need to drag a shortcut into to make it start automatically whenever you turn on your computer?
A. Autostart
B. Maintenance
C. Startup
D. Microsoft Office
148. Microsoft Outlook is the only program that can be started automatically whenever you turn your computer on. (True or False?)
149. You cannot add fields to a view. (True or False?)
150. You can copy, modify, rename, and delete views in the Advanced View Settings dialog box. (True or False?)
151. The Group By dialog box allows you to group a view using any field displayed in the view. (True or False?)
152. Which of the following is NOT a tab in the Outlook Options dialog box?
A. Calendar, which allows you to configure the Calendar tool.
B. Attachments, which lets you configure how Outlook opens attachments.
C. General, which lists the most commonly modified options in Outlook
D. Trust Center, which changes your privacy options.
153. Using Outlook, you can view multiple _____.

- A. e-mail accounts
- B. Internet calendars
- C. RSS feeds
- D. all of the above

Quiz Answers

- 142. False. You can add custom groups to default tabs or to custom tabs.
- 143. A. The purpose of the Quick Access Toolbar is to provide quick access to the commands you use most frequently.
- 144. D. AutoCorrect changes spelling errors, grammar errors, and capitalization errors.
- 145. False. AutoCorrect entries created in Outlook will appear in all other Microsoft Office programs.
- 146. False. You can change the folder Outlook opens when starting.
- 147. C. Drag a shortcut into the Startup folder to make it start automatically whenever you turn on your computer.
- 148. False. Any program, file, or folder can be started automatically, as long as its shortcut is in the Startup folder.
- 149. False. You can add fields to a view using the Field Chooser.
- 150. False. You can copy, modify, rename, and delete views in the Manage All Views dialog box.
- 151. True. The Group By dialog box allows you to group by any field displayed in the view.
- 152. B. There is no Attachments tab in the Outlook Options dialog box.
- 153. D. Using Outlook, you can view multiple e-mail accounts, Internet calendars, and RSS feeds.

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The deeper you dig into Outlook, the more features you'll find. If you're up to the challenge, you can find a lot of great features in Outlook that you may not have known about. Outlook was designed to be a multipurpose communication tool, and offers options far beyond e-mail and shared folders.

This chapter details features including using Outlook for Instant Messaging, Accessing a Web version of Outlook from any computer, sending Internet faxes, subscribing to RSS feeds, and more.

Adding RSS Feeds

Instead of skipping from one Web site to another, you can use an RSS feed to receive notifications whenever your favorite Web sites are updated. RSS stands for Really Simple Syndication, and true to its name, adding an RSS feed is easy.

Add an RSS feed from a Web page

RSS feeds consist of a headline or summary with a link to visit the original source. You can browse the headlines and decide which ones you want to read.

1. In Internet Explorer, look for a Web page with a highlighted RSS button.
The RSS button is located near the Home button.
2. Click the **RSS** button list arrow.
A list of available feeds for the Web page appears.
3. Select the RSS feed to which you'd like to subscribe.
You will be sent to an RSS feed page.
4. Click the **Subscribe to this RSS feed** link.
A dialog box appears with the name of the feed. You can change the name of the feed if you wish.
5. Click **Subscribe**.
The RSS content is now sent to your computer's Common Feed list.

Trap: If you cannot view your RSS feed, Outlook may not be configured to view the Common Feed List. To view items from the Common Feed List in Outlook, click the **File** tab on the Ribbon and select **Options**. Click the **Advanced** tab and select the **Synchronize RSS Feeds to the Common Feed List (CFL) in Windows** check box.

Add an RSS feed in Outlook's Account Settings

If you already know which Web site you'd like to receive updates from, you can enter it directly into Outlook.

1. Click the **File** tab on the Ribbon and select **Info**.
Information about your account appears.
2. Click the **Account Settings** button and select **Account Settings**.
The Account Settings dialog box opens.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Add an RSS feed from msnbc.com and view it in Outlook

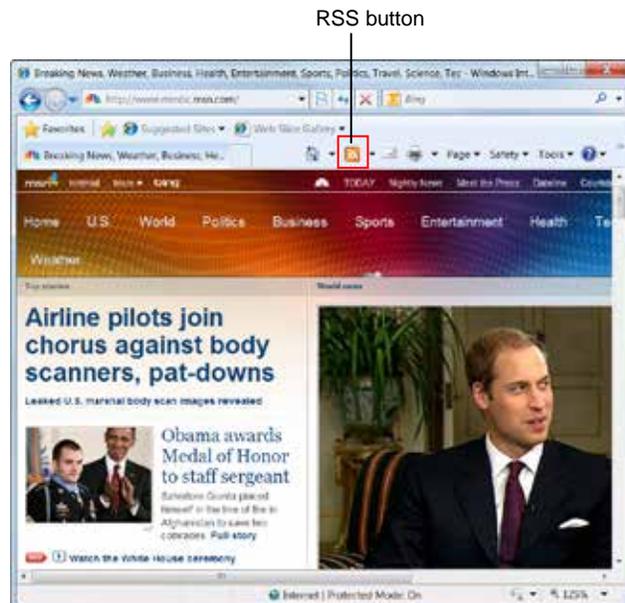


Figure 14-1: The RSS button in Internet Explorer.



Figure 14-2: The RSS Feeds tab of the Account Settings dialog box.

3. Click the **RSS Feeds** tab, then click the **New** button.

The New RSS Feed dialog box opens.

4. Enter the URL of the RSS feed to which you'd like to subscribe.

Use the URL for the feed and not the Web site itself.
For example the RSS feed for Slate magazine is
<http://feeds.slate.com/slate>.

5. Click the **Add** button.

The RSS feed appears in the Account Settings dialog box under Feed Name.

6. Click **OK**.

The RSS feed is added.

Add an RSS feed from an e-mail invitation

You may also receive an e-mail invitation to subscribe to an RSS feed, and you can add it to your feed list.

1. When you receive an RSS feed invitation, click **Add this RSS Feed**.

2. Click **OK**.

The feed is added, and the RSS content is sent to your computer.

Viewing RSS Feeds

Once you've subscribed to an RSS feed, you can view it like you'd view incoming e-mail or you can remove the feed.

View an RSS feed

1. Click the **Mail** button in the Navigation Pane.
2. Click the **Expand** button to the left of the RSS Feeds folder in the Navigation Pane.

All the RSS feeds you subscribe to appear organized as folders.

3. Select the folder you would like to view.
RSS notifications are listed in the Reading Pane.
4. Select a message to view in the Reading Pane.
The full text of the notification is displayed in the message area.
5. Click the **View Article** link below the message to view the full article in your default Web browser.

✔ **Tip:** You can forward, delete, and flag an RSS item, but you cannot reply to the sender.

Cancel an RSS feed

You can cancel an RSS feed any time.

1. Click the **Expand** button next to the RSS Feeds folder in the Navigation Pane.
The RSS feeds you subscribe to appear.
2. Right-click the RSS feed you want to delete and select **Delete Folder** from the contextual menu.
A dialog box appears, asking if you want to delete the feed.

3. Click **Yes**.
The feed is cancelled, and all content is removed.

✔ **Tip:** To cancel your subscription without deleting content from the feed, click the **File** tab on the Ribbon and select **Info**. Click the **Account Settings** button and select **Account Settings**. In the Account Settings dialog box, click the **RSS Feeds** tab. Select the RSS feed you wish to cancel and click the **Remove** button. The subscription ends, but the content is not deleted.

& Exercise

- **Exercise File:** None required.
- **Exercise:** View an RSS feed.

Click the Expand button to see folders for RSS feeds to which you currently subscribe.

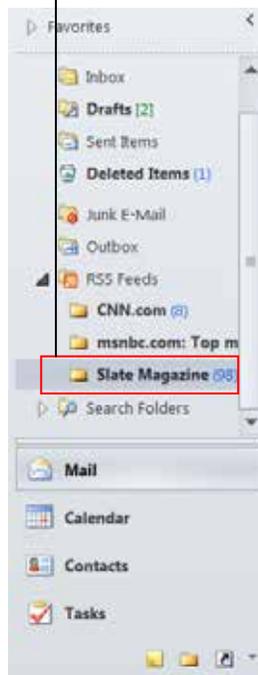


Figure 14-3: RSS Feeds in the Mail folder.

Using the Tools Together

One of the easiest ways to use the Outlook tools together is to create a new item by dragging an item onto a button in the Navigation Pane. For example, anything you drag to the Inbox becomes an outgoing e-mail message. Here's some more information about this:

& Exercise

- **Exercise File:** None required.
- **Exercise:** Understand how clicking and dragging items is a powerful shortcut in Outlook.

Table 14-1: Using Click and Drag in Microsoft Outlook

Drag this...	Here...	To Create...
 E-mail Message	 Calendar	A new appointment with the content of the e-mail message included as the appointment's description.
	 Contacts	A new contact that contains the name and e-mail address of the e-mail's sender (Useful!).
	 Tasks	A new task with the content of the e-mail message included as the task's description.
	 Notes	A new note based on the content of the e-mail message.
	 Journal	A new journal entry that contains the content of the e-mail message and when it was received.
 Appointment	 Mail	A new e-mail message with information about the appointment.
	 Contacts	A new contact with information about the appointment in the contact's notes (Seldom Used).
	 Tasks	A new task based on the appointment.
	 Notes	A new note based on the content of the appointment.
	 Journal	A new journal entry based on the date, time, and description of the appointment.
 Contact	 Mail	A new e-mail message addressed to the contact (Useful!).
	 Calendar	A new meeting request with the contact (Useful!).
	 Tasks	A new task request assigned to the contact (Useful!).
	 Notes	A new note based on the contact's information (Seldom Used).
	 Journal	A new journal entry based on the contact's information (Seldom Used).

Table 14-1: Using Click and Drag in Microsoft Outlook

 Task	 Mail	A new e-mail message with information about the task.
	 Calendar	A new appointment based on the task.
	 Contacts	A new contact with information about the task in the contacts notes (Seldom Used).
	 Notes	A new note based on the content of the task.
	 Journal	A new journal entry based on the date, time, and description of the appointment.
 Note	 Mail	A new e-mail message based on the content of the note.
	 Calendar	A new appointment based on the content of the note.
	 Contacts	A new contact based on the content of the note (Seldom Used).
	 Tasks	A new task based on the content of the note.
	 Journal	A new journal entry based on the content of the note.
 Journal Entry	 Mail	A new e-mail message with information about the journal entry.
	 Calendar	A new appointment with information about the journal entry.
	 Contacts	A new contact with information about the journal entry (Seldom Used).
	 Tasks	A new task with information about the journal entry.
	 Notes	A new note based on the journal entry.

Using Outlook Web App

Most people don't just work at one computer, so it's important that you can access Outlook from anywhere. If your organization has set up an Outlook Web App account (formerly known as Outlook Web Access), all you'll need is your e-mail address and password, and you can access your Outlook account, including e-mail, calendar, and other features from anywhere.

Connect to Outlook Web App

Your administrator needs to set up your Outlook Web App account for you. Once it has been set up, you can access your Outlook account from any computer with an Internet connection. Here's how:

1. Open a browser window and enter the URL of the organization's Outlook Web App account in the Address Bar.

The Outlook Web App login page appears. Contact your network administrator for your organization's Outlook Web App URL.

! Trap: You may see a security certificate page. Make sure you have typed in the correct address and click **Continue to current web page**.

2. Enter your e-mail address and password and click the **Sign in** button.

Your Outlook Web App account appears.

✔ Tip: If you are accessing Outlook Web App from a library or other public space, don't forget to log out when you're finished.

Check e-mail

Although Outlook Web App looks a little different than your full Outlook program, the two programs work pretty much the same way. If you know your way around Outlook, you won't have much difficulty navigating Outlook Web App.

✔ Tips

ü Outlook Web App has been optimized for Microsoft's Internet Explorer. If you use another Web browser, the buttons may look very different.

1. Log on to Outlook Web App.
The Inbox folder of Outlook Web App appears.
2. Select a message in the Message Pane
The full text of the message appears in the Reading Pane

& Exercise

- **Exercise File:** None required.
- **Exercise:** Check your e-mail using Web App.

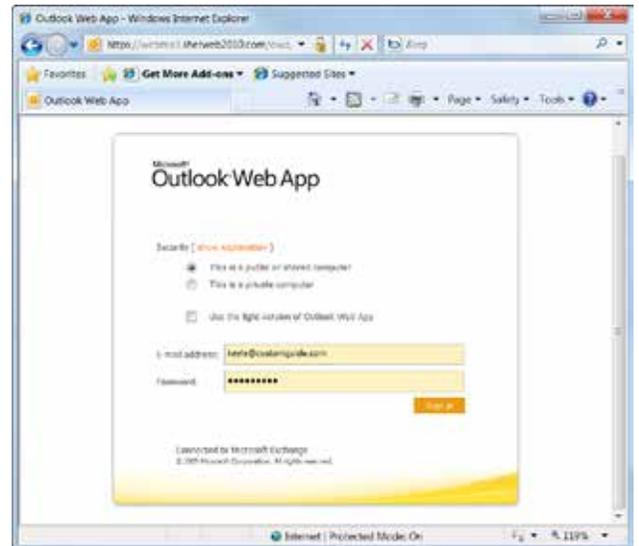


Figure 14-4: The Login page for Outlook Web App.

Table 14-2: Inbox Options in Outlook Web App

 New	Create a new e-mail or meeting request.
 X	Delete a message.
 Move ▾	Move or copy a message to a folder.
 Filter	Show or hide messages based on predefined criteria.
 View ▾	Show or hide the Reading Pane.
 Refresh	Check your messages.

Table 14-3: Reading Pane Options

	Reply to sender.
	Reply to sender and all recipients.
	Forward the message itself or forward it as an attachment.

Send e-mail

Your options for sending e-mail in Outlook Web App are very similar to your options in Outlook 2010. You can reply to or forward a message or you can create a new one. Here's how to create a new message.

1. Click the **New** button on the toolbar.
A blank message appears in a new browser window.
2. Type the name or names of your recipients.
 - **Other Ways to Add Recipient Addresses:**
 Click the **To** button to add names from your Outlook Web App Contacts list.
3. Enter a subject and message text.
Other message options are available. See the table on the right, *Message Commands*, for a list of commands available on the message toolbar.
4. Click the **Send** button.

Use other Outlook folders

All of the available folders in Outlook Web App are listed in the Navigation Pane. See the table to the right, *Folders in Outlook Web App*, for a list of available folders. Each folder has its own toolbar. Accessing a new folder is simple.

- Click the button in the Navigation Pane for the folder you wish to open.
The folder appears.

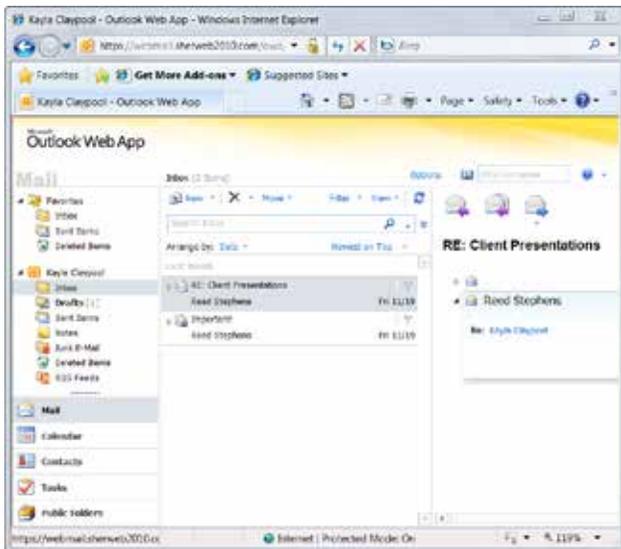


Table 14-4: Message Commands

	Send message.
	Save a draft.
	Insert attachment.
	Open Address Book.
	Name check.
	Set importance.
	Insert signature.
	Spell check.

Table 14-5: Folders in Outlook Web App

Mail	Check or send e-mail.
Calendar	Check or schedule appointments.
Contacts	View or change address book.
Tasks	Check or schedule tasks.
Public Folders	Open or edit public folders.

Figure 14-5: Outlook Web App looks similar to Outlook.

Using Instant Messaging in Outlook

Instant messaging lets you type quick conversations back and forth with someone in your Contacts. As long as the other person is online, you can chat with them in real time, meaning you won't need to wait long for a response. This can be a great way to schedule meetings or just shoot the breeze with someone. Best of all, you can access instant messaging from within Outlook.

Install Windows Live Messenger

Windows Live Messenger does not come installed in Windows, but it can be downloaded for free from the Windows Live Web site. First, you'll need a Hotmail account or a Windows Live ID. If you have either, just follow these steps to download the program.

1. Open a browser window and type <http://explore.live.com> in the Address Bar.
The browser window displays the Windows Live home page.
2. Click **Windows Live Messenger**.
The Windows Live Messenger home page appears.
3. Click the **Download now** button.
A File Download dialog box appears.
4. Click **Save**.
A Windows Explorer window opens.
5. Select a location for the file and click **Save**.
The file downloads. When the download is finished, the program will start automatically.
6. Type your e-mail address or Windows Live ID and password in the text boxes.
7. Select your options and click **Sign In**.
Windows Live Messenger appears.

✔ **Tip:** If the instant messaging service isn't activated, click the **File** tab on the Ribbon and click **Options**. In the Outlook Options dialog box, click the **Contacts** tab, select the **Display online status next to name check box** under Contacts Index, and click **OK**.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Understand how instant messaging works with Outlook.

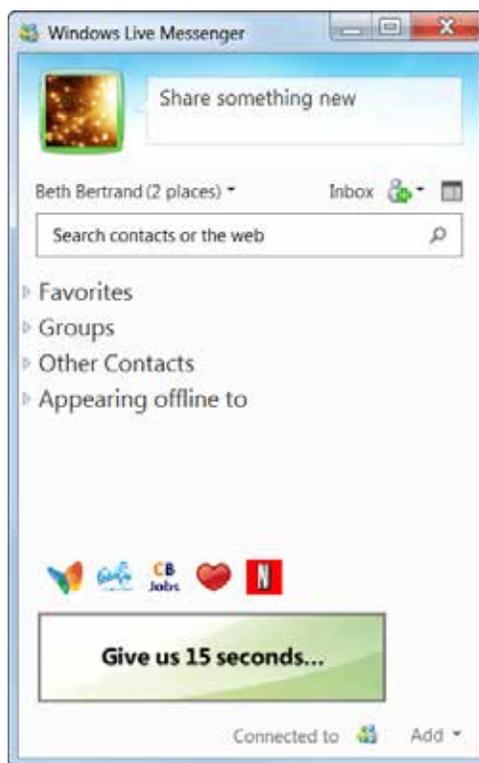


Figure 14-6: The Windows Live Messenger window.

Use instant messaging in Outlook

Outlook can now detect when people from your Contacts List are online. If they are, you can chat with them.

1. Locate a contact's name.

You can find names and online statuses in three locations.

- An open e-mail message
- The message window
- The Reading Pane

An online status indicator appears next to the contact's name. This indicator tells you if the person is online, away, busy, or offline.

- Available: 
- Busy: 
- Away: 
- Offline: 
- Presence Unknown: 

2. Click the **online status indicator** next to the contact's name.

A contact card appears. See the *Contact Card Buttons* table on the left for a list of actions you can take using the contact card.

3. Click the **Send an instant message to** button on the contact card.

A Windows Live Messenger window appears.

4. Type a message in the Windows Live Messenger window.

5. Press **<Enter>**.

The message appears in the upper pane. A response should appear shortly.

6. When your conversation is finished, click the **Close** button.

The conversation closes. You remain signed in to Windows Live Messenger.

Online status indicator

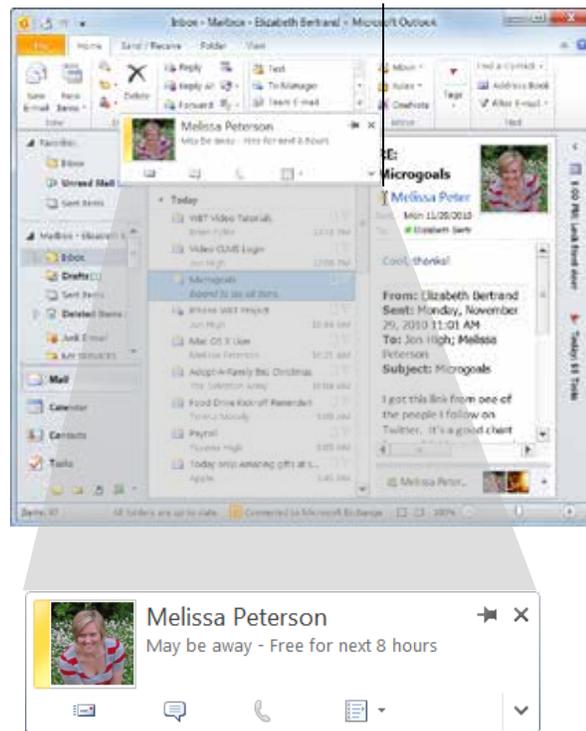


Figure 14-7: An online status indicator indicates that this person is online, but away from her computer.

Table 14-6: Contact Card Buttons

	Send an e-mail message to a contact.
	Send an instant message to a contact.
	Call a contact.
	View other options.

Connecting to Social Networks

Electronic communication is not just e-mail. We now have friends on Facebook, contacts on LinkedIn, and other connections through social networking Web sites. Outlook 2010 lets you track all your contacts using the Outlook Social Connector.

Download a social network provider add-in

The Outlook Social Connector lets you view information about your personal and business social networks. Although Outlook 2010 includes the Outlook Social Connector, you still need to download add-ins for each of your social networks.

1. Click the **View** tab on the Ribbon and click the **People Pane** button in the People Pane group.

A list of options appears.

2. Select **Account Settings**.

The Microsoft Outlook dialog box appears.

3. Click the **View social network providers available online** link.

An Internet browser appears, displaying the Outlook Social Network Provider Listing Web page. This Web page lists all social network providers that provide Outlook Social Connector add-ins.

4. Click the icon for the social network provider you would like to install and follow the steps to download the add-in.

You may have to restart Outlook to successfully complete the installation.

Connect to a social network

You need to log in to your social network add-in through Outlook once you've added downloaded the add-in.

1. Click the **View** tab on the Ribbon and click the **People Pane** button in the People Pane group.

A list of options appears.

2. Select **Account Settings**.

The Microsoft Outlook dialog box appears.

& Exercise

- **Exercise File:** None required.
- **Exercise:** Download a social network provider add-in and use your account log in information to connect to that social network account.

Table 14-7: Available Social Network Providers as of November 2010

 Windows Live Messenger	 Facebook
 LinkedIn	 My Space

*View the Outlook Social Network Provider Listing Web page for the most current list of social network providers.

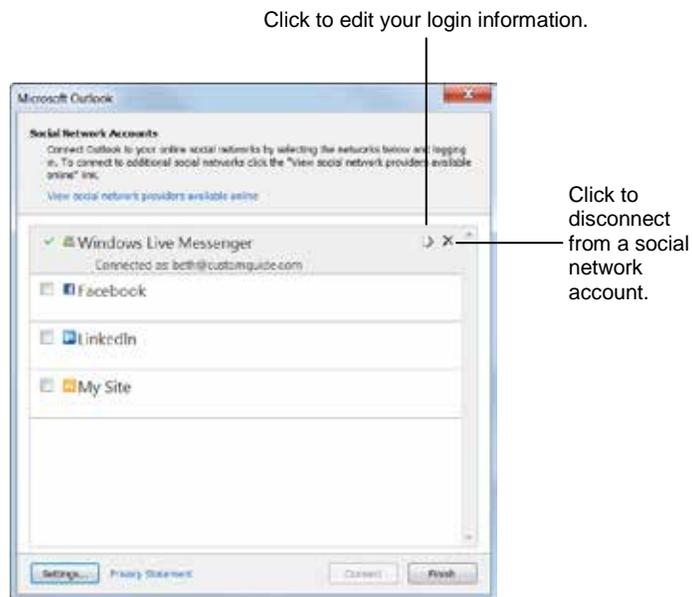


Figure 14-8: Manage your social network accounts in the Microsoft Outlook dialog box.

3. Select the check box for the social network to which you wish to connect.

You will need to sign in to the social network using your user name and password.

✔ **Tip:** To edit your log in information at any time, click the **Edit** button next to the social network in the Microsoft Outlook dialog box.

4. Enter any credentials necessary to log in and click the **Connect** button.

Outlook verifies your credentials and connects you to the social network.

5. Click the **Finish** button.

A message appears confirming that you have successfully connected to the social network.

6. Click the **Close** button.

The Microsoft Outlook dialog box closes.

Disconnect from a social network

If you don't want to view updates from a particular site, you can disconnect from a social network.

1. Click the **View** tab on the Ribbon and click the **People Pane** button in the People Pane group.

A list of options appears.

2. Select **Account Settings**.

The Microsoft Outlook dialog box appears.

3. Click the **Remove** button next to the social network from which you wish to disconnect.

A dialog box appears warning you that not only will information no longer be shared between Outlook and the social network, but also previously downloaded information will be deleted.

4. Click **Yes**.

You are now disconnected from the social network. You can reconnect at any time.



Figure 14-9: A message appears when you successfully connect to a social network.

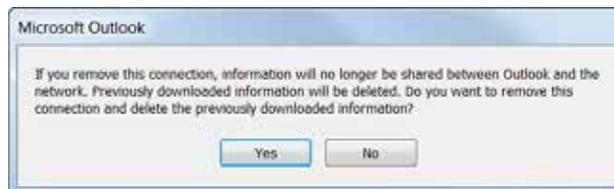


Figure 14-10: When you disconnect from a social network, you will lose information about your contacts.

Using the Outlook Social Connector

The Outlook Social Connector lets you view information about your contacts and add contacts to your social network without leaving Outlook.

View social network updates in Outlook

You can view information about contacts, including those you are connected to via a social networking site, using the People Pane.

- Click the **Mail** button in the Navigation Pane and select the item you would like to view.

Information about your contact appears in the People Pane at the bottom of the Reading Pane. Click a tab to view specific information about a contact, such as a list of e-mail messages they have sent you. See the table to the right, *People Pane Tabs*, for more information about what the People Pane can display.

- Other Ways to View Social Network Updates:** Open an e-mail message or calendar item. The People Pane displays at the bottom of the item window.

Invite a contact to a social network

You can invite any of your Outlook contacts to join your social network without ever leaving Outlook.

- Click the **Add** button in the People Pane.

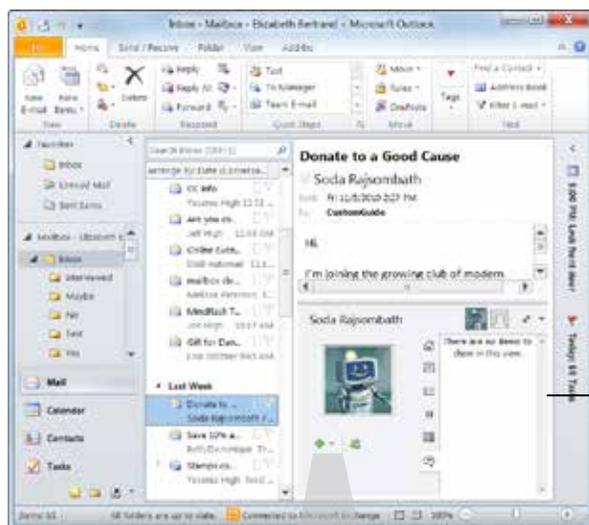
A list of social networks you are currently connected to appears.
- Select which social network provider you want to use.

The Microsoft Outlook dialog box appears, asking you if you want to add this contact to the selected social network.
- Click **Continue**.

An e-mail is sent to the contact asking him or her to connect with you on the selected social network.

& Exercise

- Exercise File:** None required.
- Exercise:** Add a contact to your social network.



The Add button —  The People Pane appears at the bottom of the Reading Pane.

Table 14-8: People Pane Tabs

 All Items	Displays e-mail, meetings, and other activity for the contact.
 Activities	Displays news feed updates and RSS articles about the contact.
 Mail	Displays e-mail messages that you have received from the contact.
 Attachments	Displays attachments you have received from the contact.
 Meetings	Displays meetings requests from the contact.
 Status Updates	Displays status updates submitted by the contact.

Hide the People Pane

If the constant status updates are distracting you, hide the People Pane.

1. Click the **View** tab on the Ribbon and click the **People Pane** button in the People Pane group.

A list of options appears.

2. Select **Off**.

The People Pane closes.

 **Tip:** To display the People Pane again, click the **People Pane** button in the People Pane group and select **Normal** or **Minimized**.

Advanced Topics Review

Quiz Questions

154. How can you tell if you can subscribe to an RSS feed on a page?
- A. The RSS button above that page is highlighted in orange.
 - B. You are able to e-mail a link to that page.
 - C. There is an RSS Stamp of Approval somewhere on the Web page.
 - D. The Web page appears on the list in Outlook's Account Settings.
155. What should you do if you wish to stop receiving RSS notifications but want to keep the ones you have already received?
- A. In Account Settings, click the RSS Feeds tab, select the feed, and click the Remove button.
 - B. In the Navigation Pane, expand the RSS Feeds folder, select the feed, and click the Delete button.
 - C. In Internet Explorer, click the RSS Feeds button and press <Delete>.
 - D. Drag the RSS Feeds folder into the Recycle bin.
156. You've just received an e-mail from someone you want to add to your Contacts list. What's the fastest way to do this?
- A. Click the Contacts button in the Navigation Pane, click the Home tab on the Ribbon, click the New Contact button on the in the New group, and manually enter the contact.
 - B. Select the e-mail and press <Ctrl> + <A>.
 - C. Drag the e-mail to the Contacts button in the Navigation Pane.
 - D. Select the e-mail, click the Home tab on the Ribbon, click the New Items button, and select Contacts.
157. When you use Outlook Web App, you can only access your Outlook account from:
- A. The computer you installed Outlook Web App on.
 - B. Computers that have been approved by your administrator.
 - C. Computers that are running Outlook 2010.
 - D. Computers with Internet access.
158. Mail, Calendar, Contacts, and Tasks folders are all available in Outlook Web App. (True or False?)
159. What color button indicates that someone is online?
- A. Red
 - B. Yellow
 - C. Green
 - D. White
160. If you want to use Windows Live Messenger:
- A. You need to download it from Microsoft's Web site for free.
 - B. You can download it for \$9.95.
 - C. You must buy the Windows Live Messenger software and the patch required to run it.
 - D. The program is already installed with Windows.
161. Downloading a social network provider add-in automatically connects you to that social network. (True or False?)

162. Which of the following can you NOT view in the People Pane?
- A. Status updates from the contact.
 - B. E-mails you have received from the contact.
 - C. The names of everyone in the contact's social network.
 - D. Attachments the contact has sent you.

Quiz Answers

154. A. If the RSS button above a Web page is highlighted in orange, you can subscribe to the feed on that page.
155. A. If you wish to stop receiving RSS notifications but keep the ones you have already received, click the RSS Feeds tab in Account Settings, select the feed, and click the Remove button.
156. C. You can add an e-mail sender to your Contacts List by dragging any e-mail from them to the Contacts button in the Navigation Pane.
157. D. When you use Outlook Web App, you can only access your Outlook account from computers with Internet access.
158. True. Mail, Calendar, Contacts, and Tasks folders are all available in Outlook Web App.
159. C. A green button by a contact's name indicates that he or she is online.
160. A. If you want to use Windows Live Messenger, you can download it from Microsoft's Web site for free.
161. False. After you download a social network provider add-in, you must connect to the social network.
162. C. You cannot view the names of everyone else in the contact's social network from the People Pane.