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ABOUT THIS COURSE

COURSE PREREQUISITES

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

COURSE OVERVIEW

Welcome to the first part of our courseware for Microsoft Office Outlook 2016, Microsoft's powerful and easy-to-use personal information management program. This new version of Outlook incorporates some new features that will help make managing your e-mail and personal information easier than ever.

This course is intended to help all novice computer users get up to speed with Outlook quickly. This manual will also help more experienced users who have little to no experience with Outlook and the ribbon interface.

COURSE OBJECTIVES

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

HOW TO USE THIS BOOK

This course is broken up into eight lessons. Each lesson focuses on several key topics, each of which are broken down into easy-to-follow concepts. At the end of each topic, you will be given an activity to complete. At the end of each lesson, we will summarize what has been covered and provide a few review questions for you to answer. Supplemental learning for selected topics is provided in the form of Lesson Labs at the end of this book.

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

LESSON 1: GETTING STARTED WITH OUTLOOK 2016

Lesson Objectives

In this lesson you will learn how to:

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

TOPIC A: Navigate the Outlook Interface

Microsoft Office Outlook is a powerful and easy-to-use e-mail client and scheduling manager. Nearly everyone who has used an e-mail client has probably worked with a version of Outlook. It is used in many organizations worldwide and it has become one of the most commonly used e-mail clients on the market. While the incredible amount of features that are available in this latest version of Outlook may seem daunting at first, once we cover the basics of working with it, you will be well on your way to becoming an Outlook master.

Topic Objectives

In this topic, you will learn:

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

E-MAIL

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

E-mail Clients

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

E-MAIL ADDRESSES

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

E-mail addresses are comprised of three main parts:

- The name or handle of the person that you are e-mailing (**johnsmith** in this example)
- The **@** symbol
- The domain (**example.org**), which includes both the host name and an extension like .com or .org

MICROSOFT OUTLOOK 2016

Microsoft Outlook 2016 is a versatile e-mail client and a personal information manager (PIM). This means that you can use Outlook 2016 to create, send, and manage e-mail; manage your address book; keep track of your to-do list; and schedule appointments. The different components of Outlook are all integrated, so you can use your contacts to address an e-mail, track all contact with a particular person, or send your community group tasks. Basic Windows functions, like cutting, copying, and pasting, are also included.

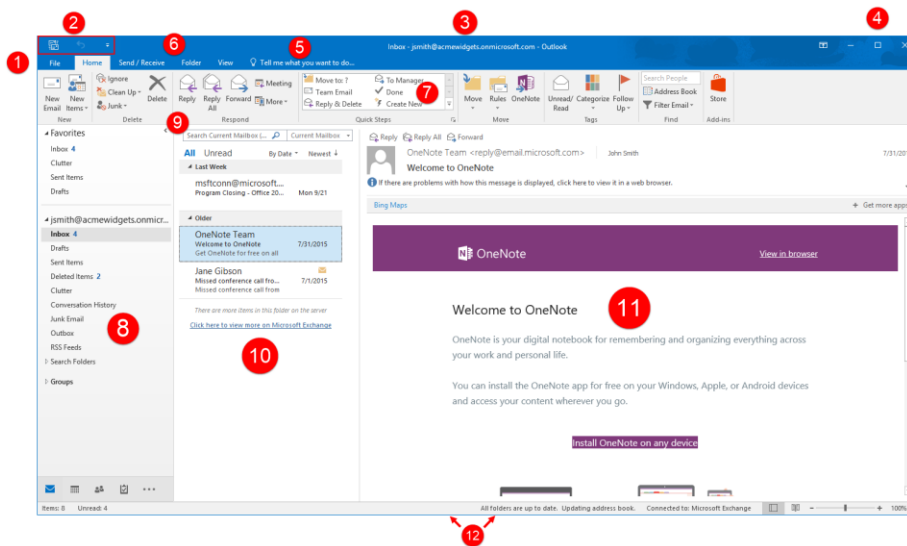
There are also many add-ins that you can download or purchase to provide additional functionality in Outlook 2016. As well, other applications (such as antivirus software, word processors, and contact managers) also add their tools into Outlook to help you manage your data. While you don't need to worry about these tools right now as they won't be covered in this course, it is good to know about them in case you see objects within your copy of Microsoft Outlook that don't match the pictures or descriptions in these lessons.

ITEMS AND FOLDERS

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

COMPONENTS OF THE OUTLOOK INTERFACE

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



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

1: File Menu (Backstage View)

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

2: Quick Access Toolbar

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

3: Title Bar

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

4: Window Controls

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

5: Tell Me

Using this text box, you are able to ask questions and access help information.

6: Tabs

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

7: Groups

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

8: Navigation Pane

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

9: Search Box

Use this area to search for items within your mailbox.

10: Working Area

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

11: Reading Pane

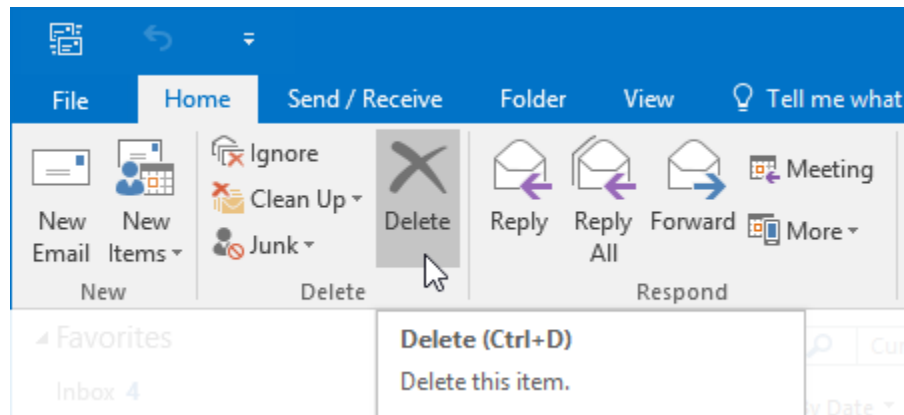
View the contents of the selected item here.

12: Status Bar

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

ScreenTips

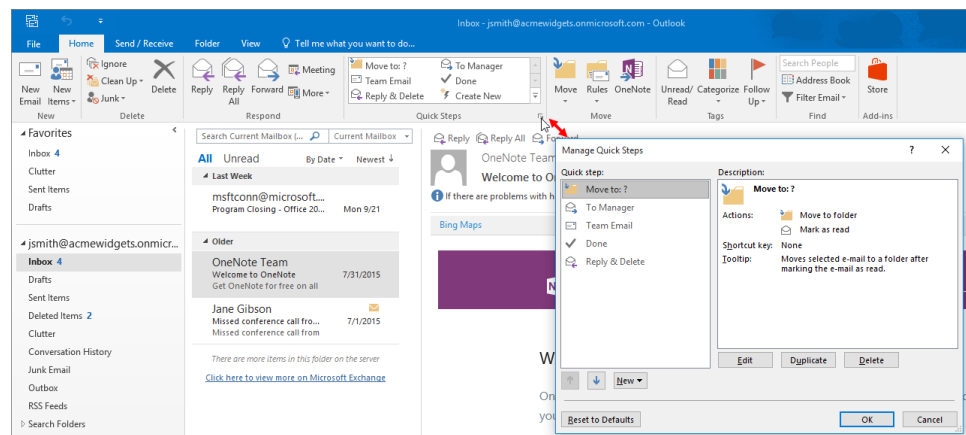
ScreenTips appear as a small pop-up when you move your cursor over an object in the Outlook 2016 interface, such as a ribbon command:



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

Dialog Box Launchers

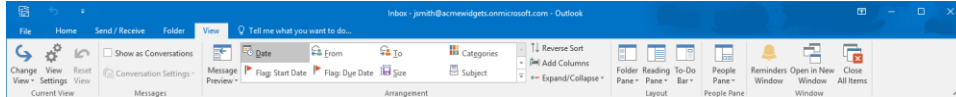
Some groups feature an option button (ⓘ) beside the group name. Click this button to open a dialog with more specific controls relating to this group and other commands in the tab:



COMPONENTS OF THE RIBBON

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

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



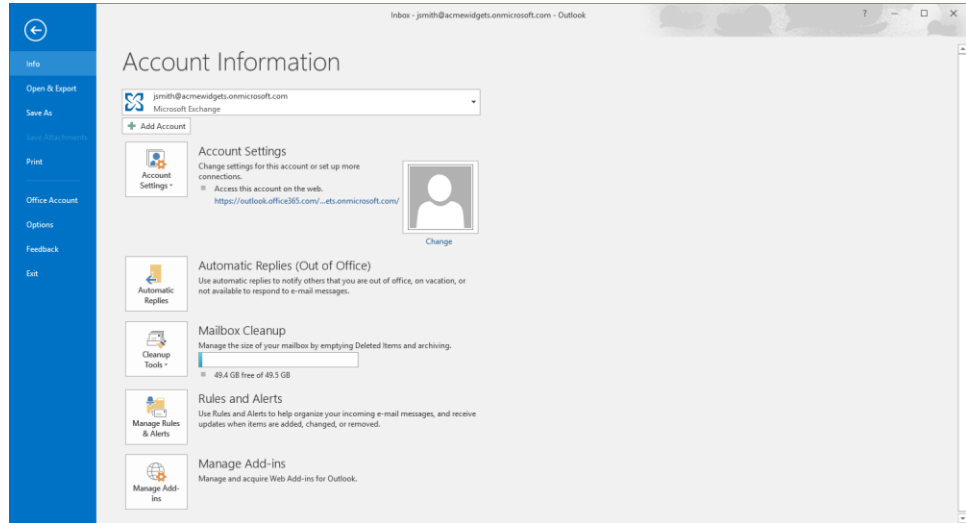
There are five **tabs** (including the File tab) that are available in Outlook's main interface. Below is a breakdown of the kinds of commands that you will find in each tab:

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

THE BACKSTAGE VIEW

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

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

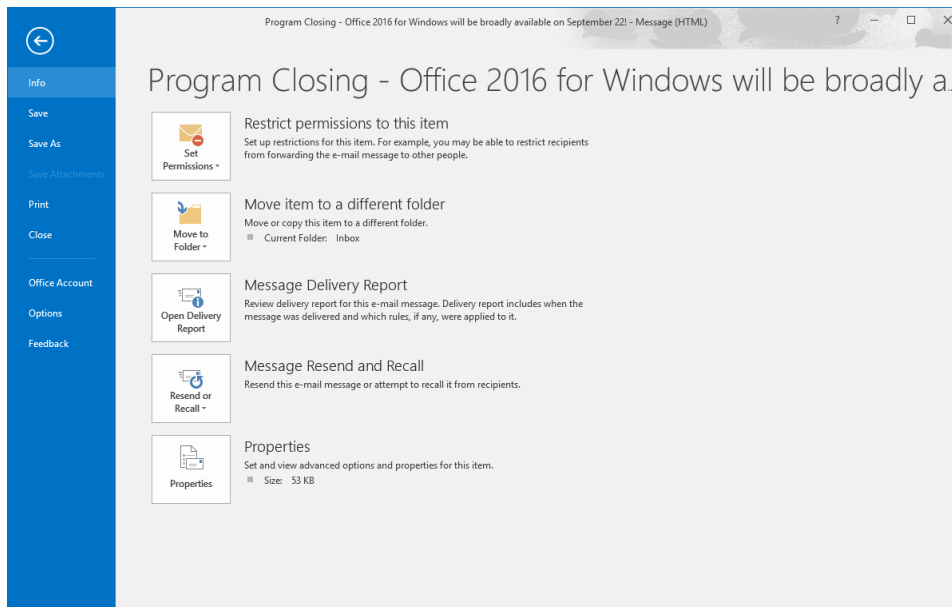


Here is a quick overview of the items in Backstage view in this context:

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

Feedback	Opens the Windows Feedback app.
Exit	Close Outlook.

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



Let's look at these commands.

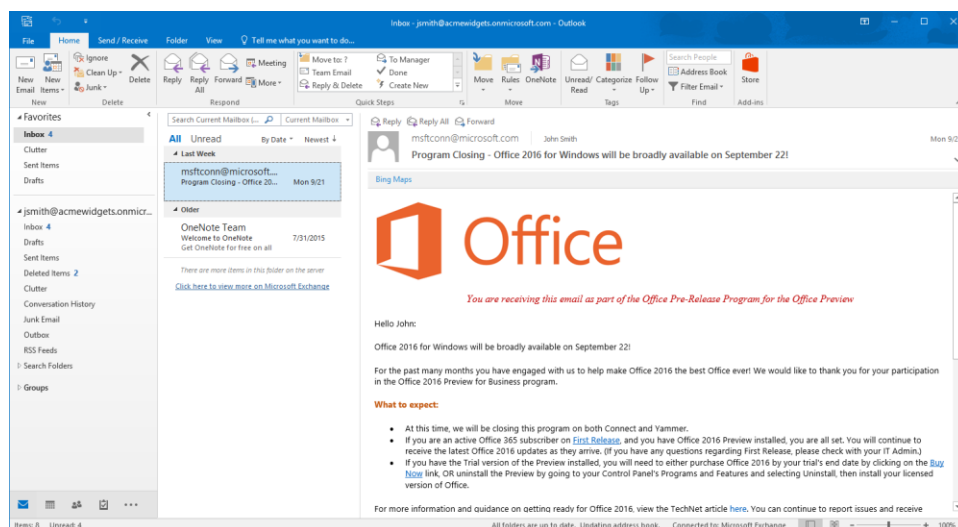
Info	Provides commands to restrict permission to the item, move the item, resend or recall a message, and view message properties.
Save/Save As	Save the currently selected item as a separate file outside of Outlook.
Save Attachments	Save attachments to the currently selected item as separate file(s) outside of Outlook. Only available if the selected item has attachments.
Print	Set print options for the selected item and print preview it.
Close	Close the current Outlook object window.

Office Account	Modify the settings for the account that you are using to log into Office.
Options	Opens the Outlook Options dialog.
Feedback	Opens the Windows Feedback app.

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

THE MAIL WORKSPACE

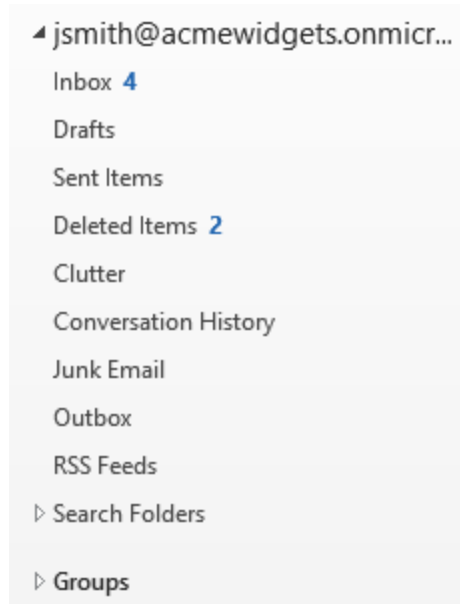
When you first open Outlook 2016, the Mail workspace will be displayed by default. This is where you can view and work with any messages that you receive. You will typically spend the bulk of your time in this workspace:



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

MAIL FOLDERS

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



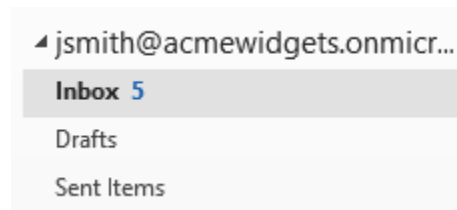
Let's take a look at some of these mail folders.

Inbox	This is where new mail is received.
Drafts	Unsent messages can be saved here.
Sent Items	After a message is sent, a copy of it is stored here.
Deleted Items	This folder acts like the Recycle Bin in Windows. When you delete an Outlook item, it goes here first. To permanently remove the items in your Deleted Items folder, click Folder → Empty Folder while in the Deleted Items folder.
Clutter	E-mail that has been identified as less important based on your reading habits will be moved to this folder. Typically this will include items such as newsletters or other mailing lists. Only available with Office 365 customers.
Conversation	This folder will list conversation history for any contacts

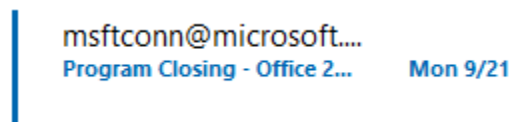
History	that you have interacted with using Microsoft Lync or Skype for Business.
Junk E-mail	E-mail marked as junk will arrive here.
Outbox	Messages you have created are stored here while Outlook connects to the server and sends the message.
RSS Feeds	Live feeds are stored here.
Search Folders	You can customize these folders to update based on search criteria.
Groups	Access shared workspaces. Only available with Office 365 accounts.

READ AND UNREAD MESSAGES

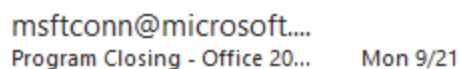
When you receive new messages, the folder that contains them will appear bold within the Navigation pane and a counter identifying the number of unread messages will be displayed adjacent to it:



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

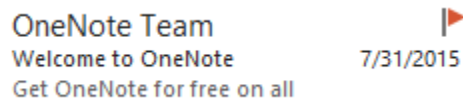


Read messages do not have the bold effect or the line:








MESSAGE ICONS

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

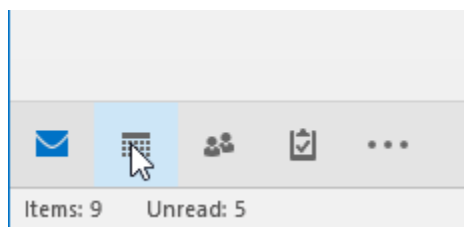


Here is a breakdown of the various message icons that you might spot inside a message in the working area:

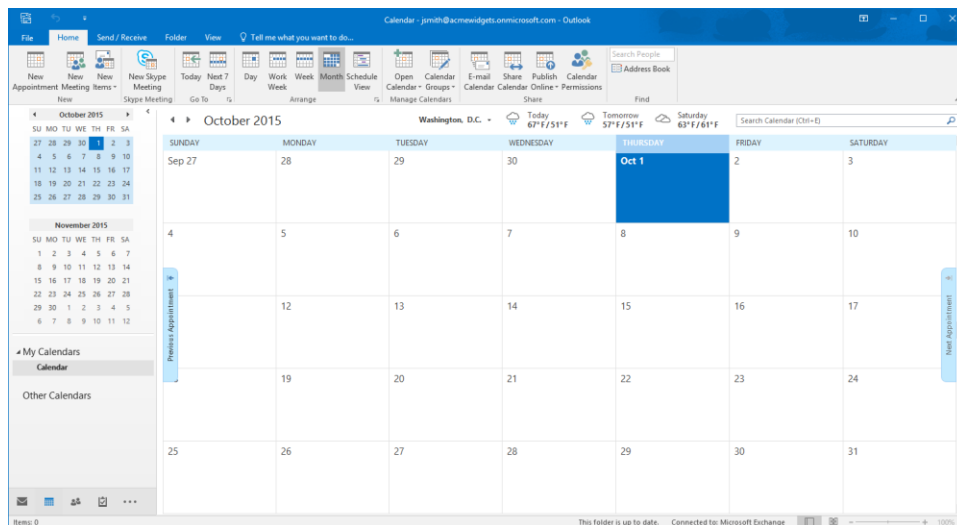
Replied To		The message has been replied to.
Forwarded		The message has been forwarded.
High Importance		The message is important and probably time sensitive.
Attachment		The message includes an attachment.
Flagged for Follow-Up		The message has been flagged for follow-up at a later time or date.

THE CALENDAR WORKSPACE

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



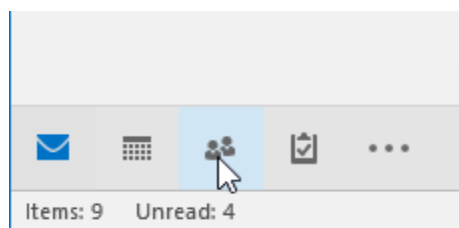
When open, you will see that the Calendar workspace is comprised of the Navigation pane and the calendar itself:



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

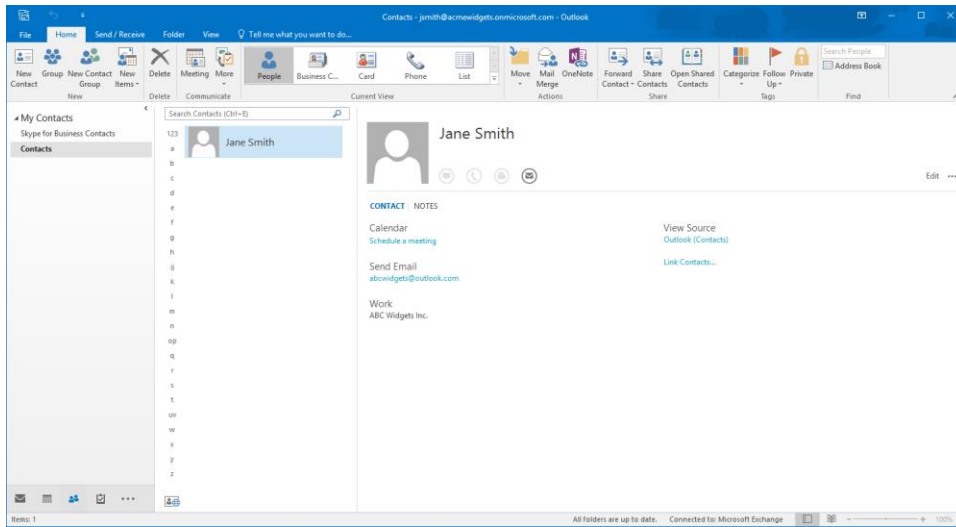
THE PEOPLE WORKSPACE

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



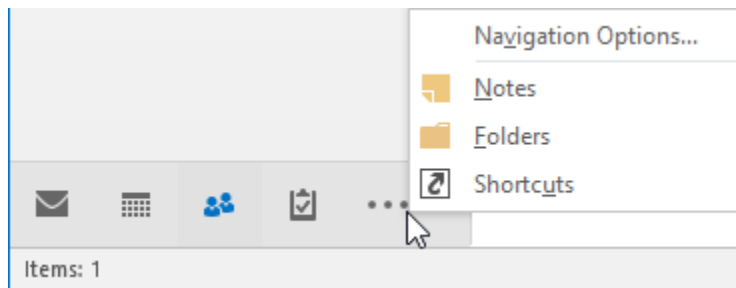
When the People workspace is open, you will see that it is comprised of the Navigation pane, the working area, and the Reading pane. The Navigation pane will list all of the folders that are used to organize your contacts, while the working area is where individual contacts are listed.

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



ADDITIONAL OUTLOOK TOOLS

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



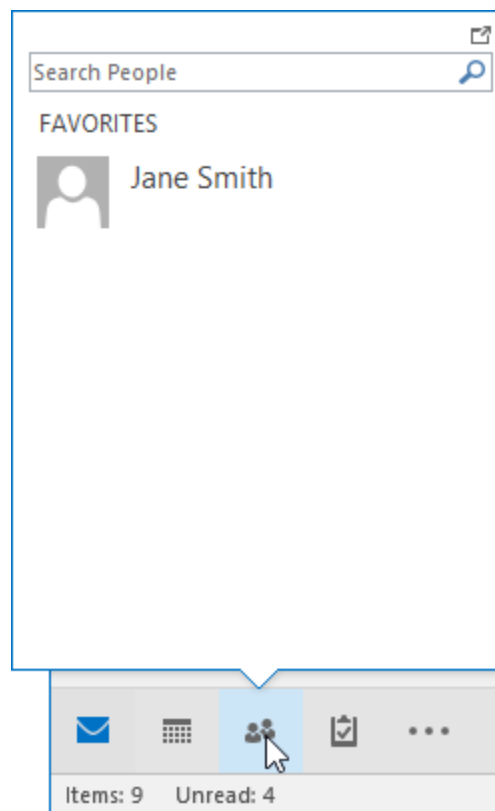
Here is a breakdown of the tools that are available to you:

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

PEEKS

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

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

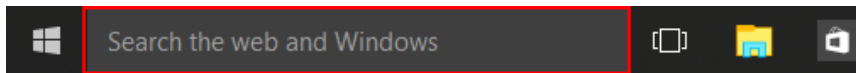


ACTIVITY 1-1

Navigating the Outlook Interface

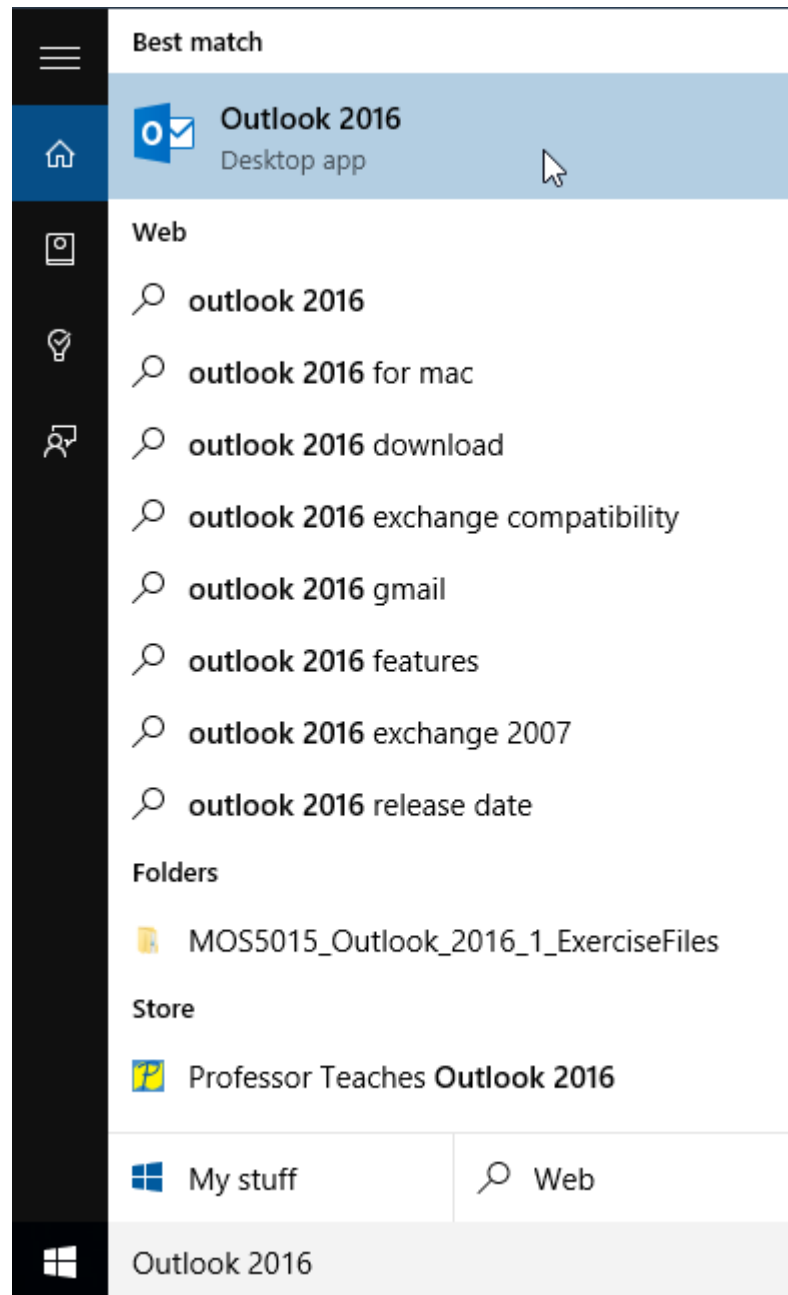
You are just getting started with Outlook 2016. You would like to explore its interface to get a feel for how it works and where everything is. Note that Outlook must be configured with an e-mail account before students can complete this activity.

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

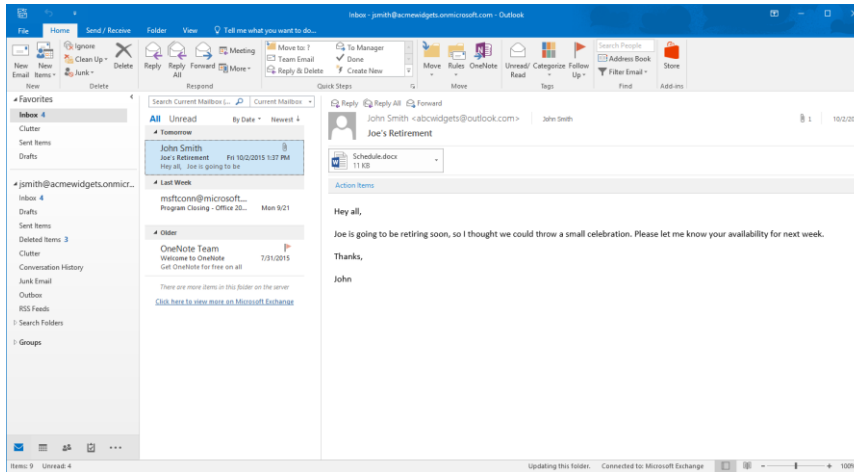


(If you are using Windows 8, start typing at the Start screen to search.)

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

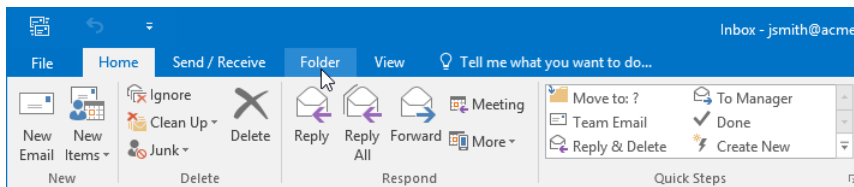


3. Microsoft Outlook 2016 will open with the Mail workspace displayed:

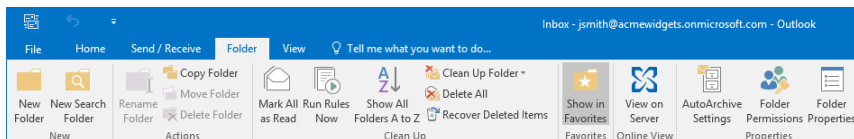


(You will see different messages in your e-mail inbox than those that are shown here.)

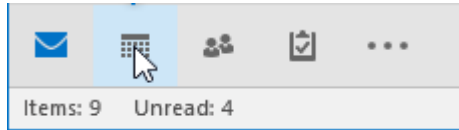
4. Click the Folder tab at the top of the screen:



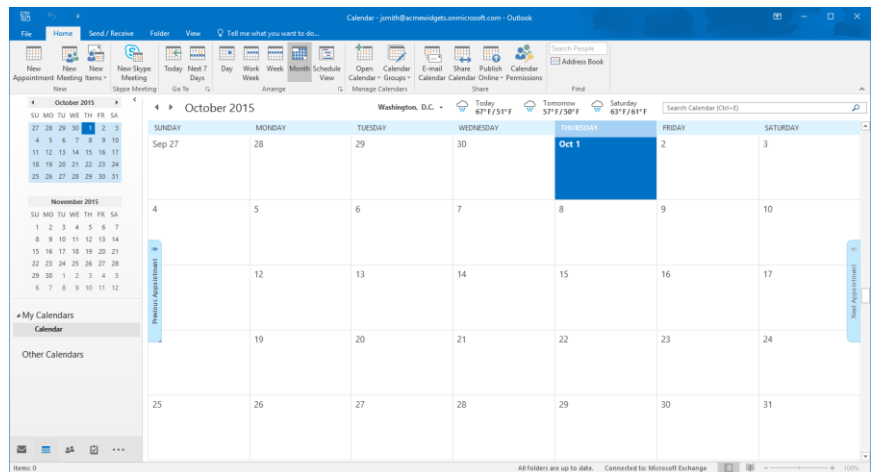
5. Review the various groups and commands that make up this tab:



6. Click the Calendar command in the Navigation pane:



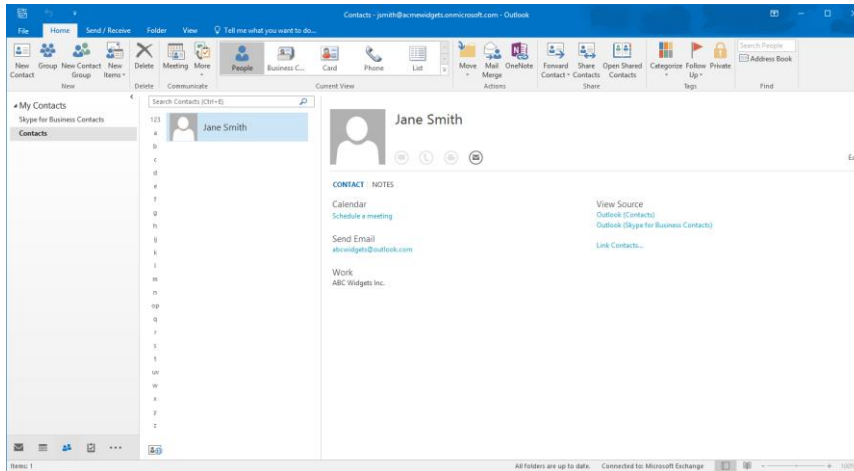
7. The Calendar workspace will now be displayed with the Month view applied:



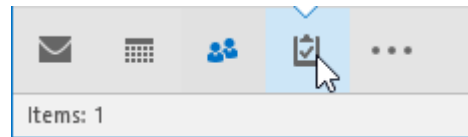
8. Click People in the Navigation pane:



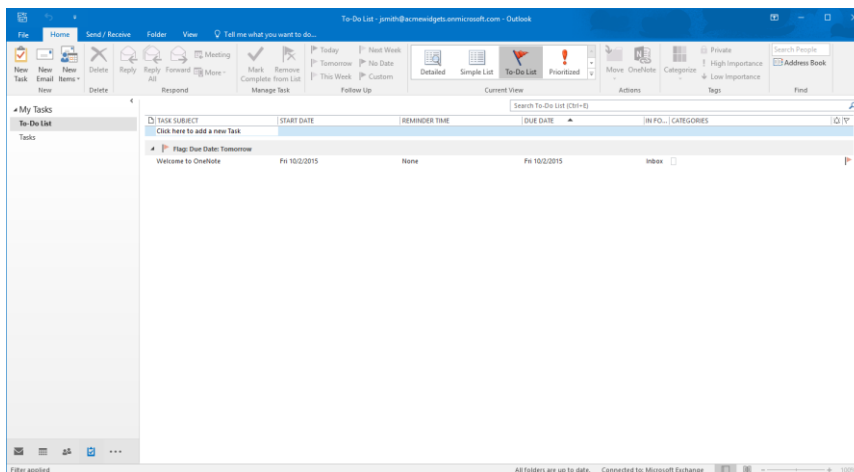
- The People workspace will now be displayed. Any contacts that you have will be listed in the working area. If you have any contacts, the details of the first item will be shown in the Reading pane:



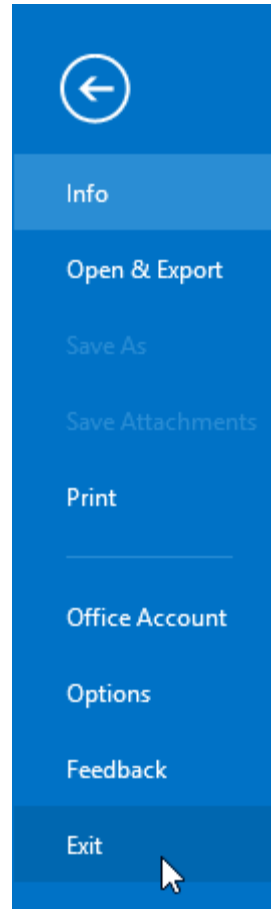
- Now click the Tasks button in the Navigation pane:



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



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



TOPIC B: Perform Basic E-mail Functions

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

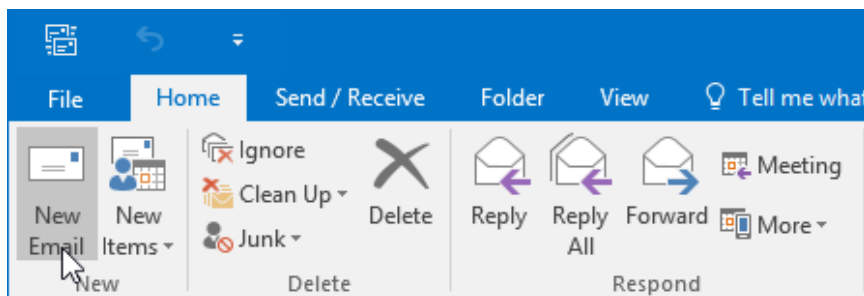
Topic Objectives

In this topic, you will learn:

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

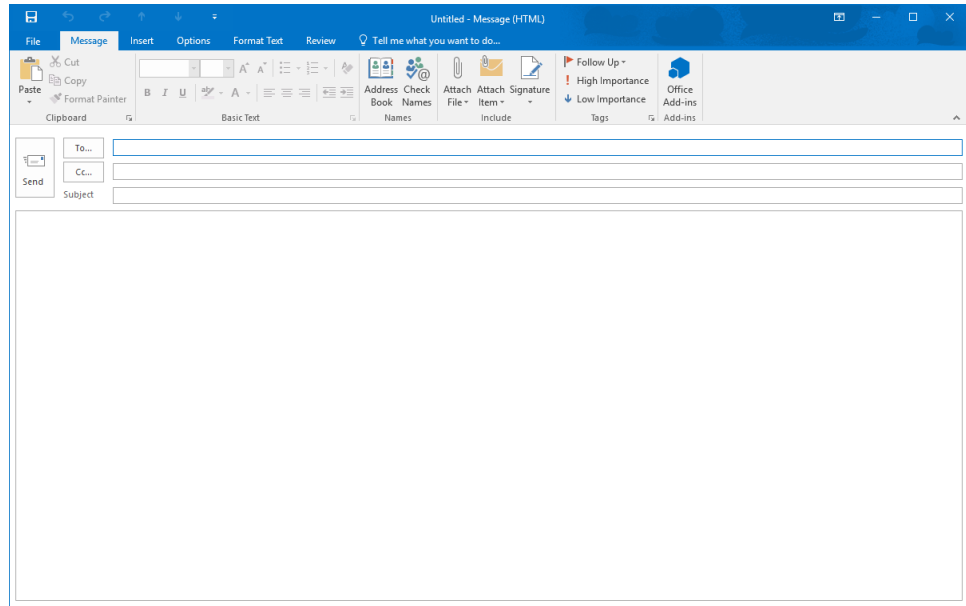
THE MESSAGE FORM

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

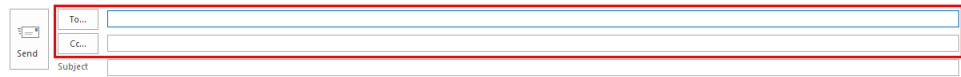


(You can also use the Ctrl + N shortcut when you are in the Mail workspace.)

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

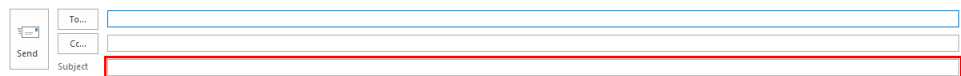


To begin, type the e-mail address(es) of the recipient(s) into the To or Cc fields:

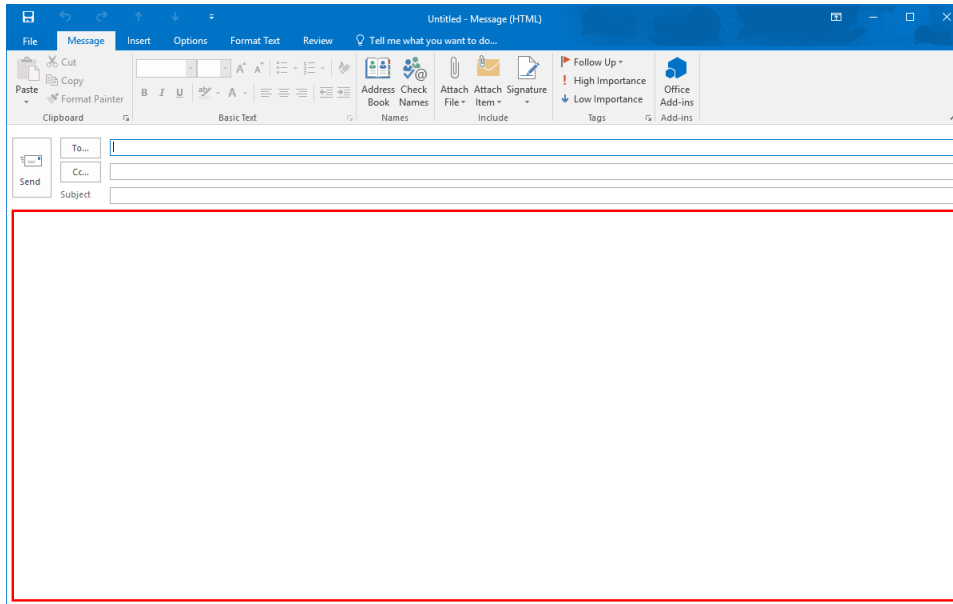


Typically, you will enter any primary recipients into the **To** field, while secondary recipients who are not necessarily expected to reply to the message are entered into the **Cc (carbon copy)** field. The **Bcc (blank carbon copy)** field is used when you would like to copy a recipient on the message,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

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

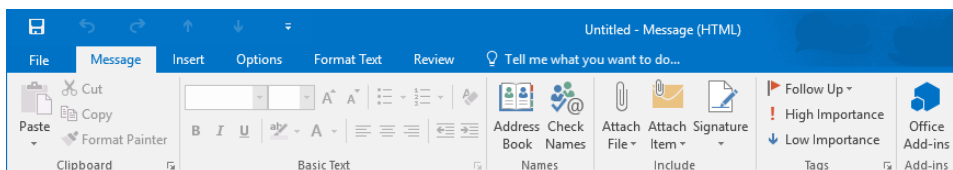


Finally, and most importantly, enter the content of your message into the large text area that dominates the Message form:



MESSAGE FORM TABS

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



Here is an overview of each tab:

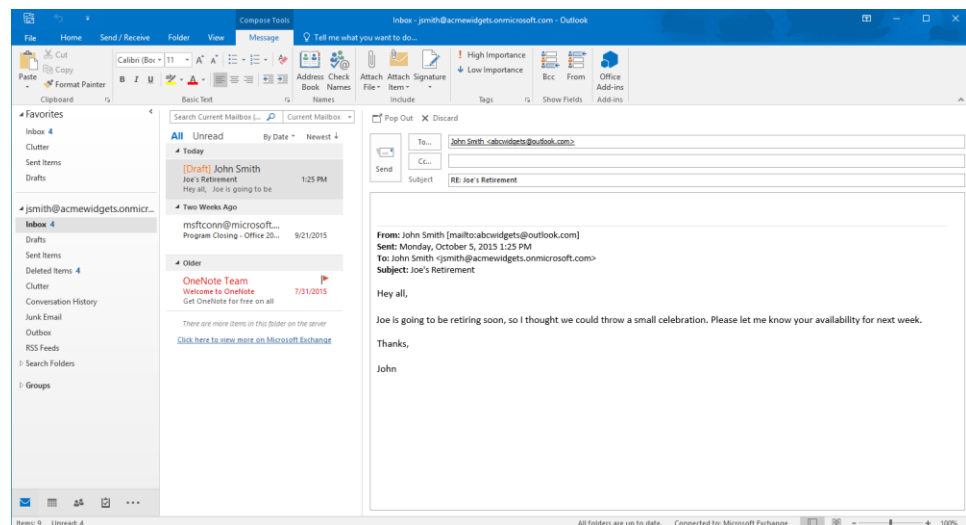
- **File:** Clicking this tab will display Backstage view. While working with the message form, Backstage view will include options to set the properties for the message and restrict permissions for this item.
- **Message:** In the Message tab, you will find basic editing tools that you can use to format text, as well as add items like attachments or signatures. Additionally, you will find commands to tag the message with a priority level or follow-up flag.
- **Insert:** The Insert tab includes a variety of commands that you can use to insert objects into your message. This includes objects like

Outlook items (such as meetings), file attachments, tables, illustrations, and more.

- **Options:** In the Options tab, you will see commands that will allow you to apply themes to your message, as well as enable message options. For example, you can toggle the Bcc field on or off, as well as request delivery and read receipts.
- **Format Text:** As the name suggests, the Format Text tab contains commands that are used to format the text in the body of the message that you are composing. This includes commands to apply text effects, change the font style, and modify paragraph alignment.
- **Review:** The Review tab includes commands that are intended to be used after you have composed the message. You will find commands to check your spelling, open the Insights pane, use the thesaurus, and modify language settings.

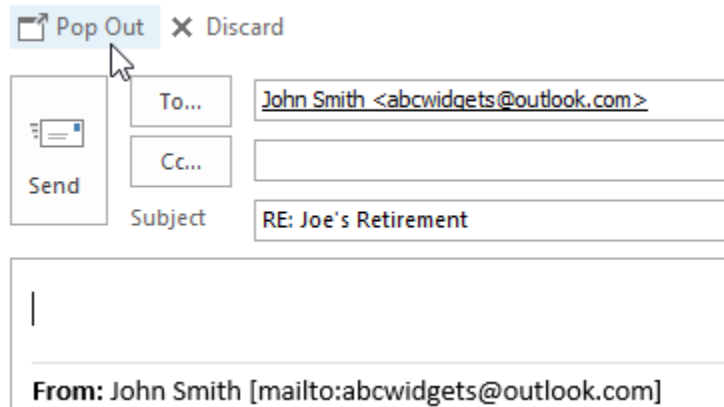
INLINE REPLIES

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

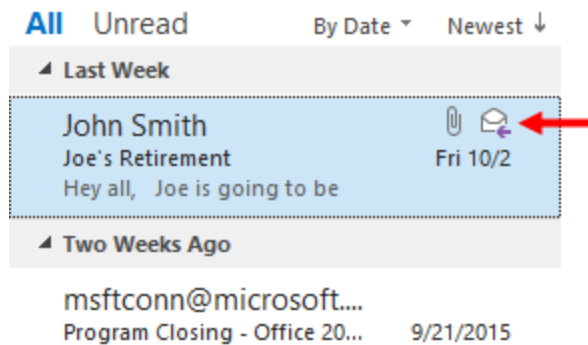


(You can also create an inline forwarded message by clicking Home → Forward.)

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

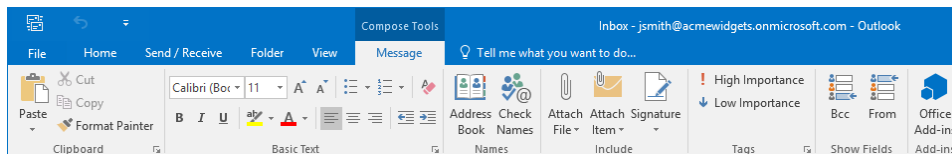


You can cancel the reply and discard the message that you are composing by clicking the Discard button. Or, if you have finished composing your response, click the Send button. Back in the Inbox, you will see a message icon that indicates that it has been replied to:



The Compose Tools – Message Tab

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

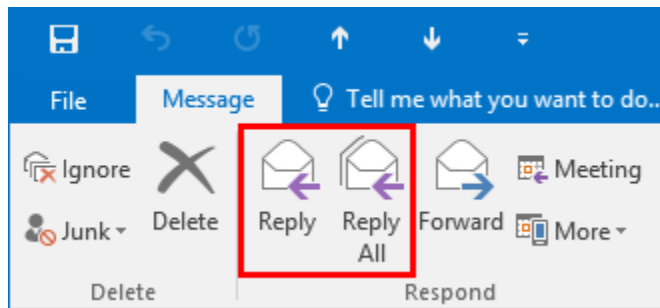


This tab includes the following seven groups:

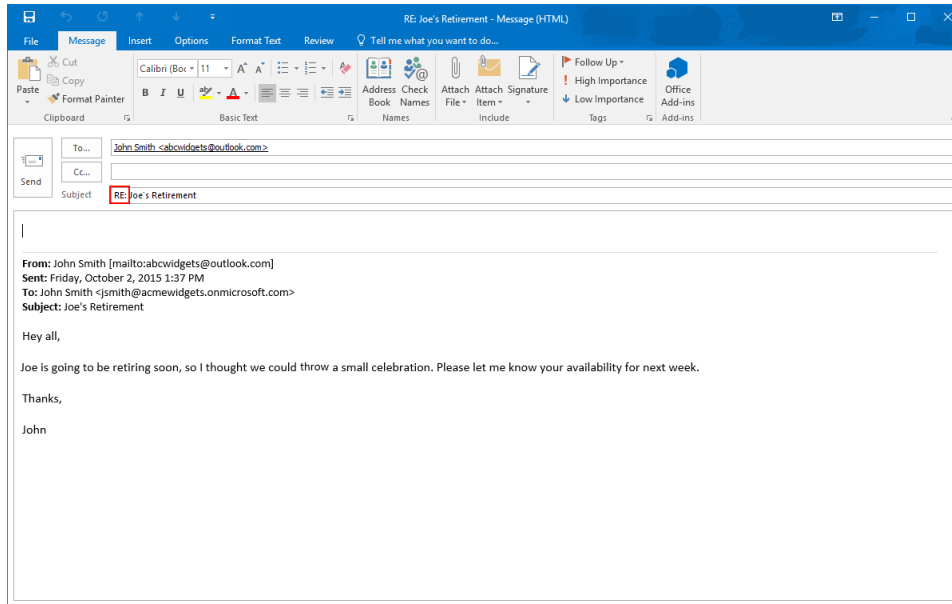
- **Clipboard:** This group includes cut, copy, and paste commands, as well as the Format Painter command.
- **Basic Text:** All of the basic text formatting commands are included in this group. This includes text effects, font settings, alignment, and more.
- **Names:** Access the Address Book and check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

REPLYING TO MESSAGES

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



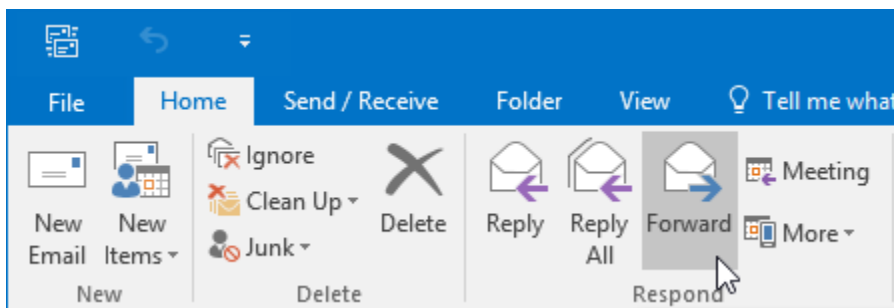
No matter whether you click Reply or Reply All, you will see the full-screen Message form displayed with the e-mail addresses for the recipients who will receive your reply, as well as the original message in the main message body. You will also notice that the Subject field includes the subject line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



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

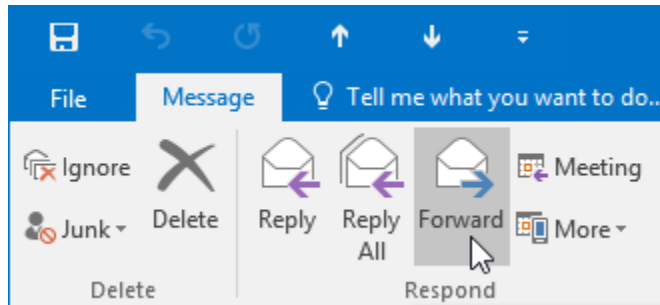
FORWARDING MESSAGES

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

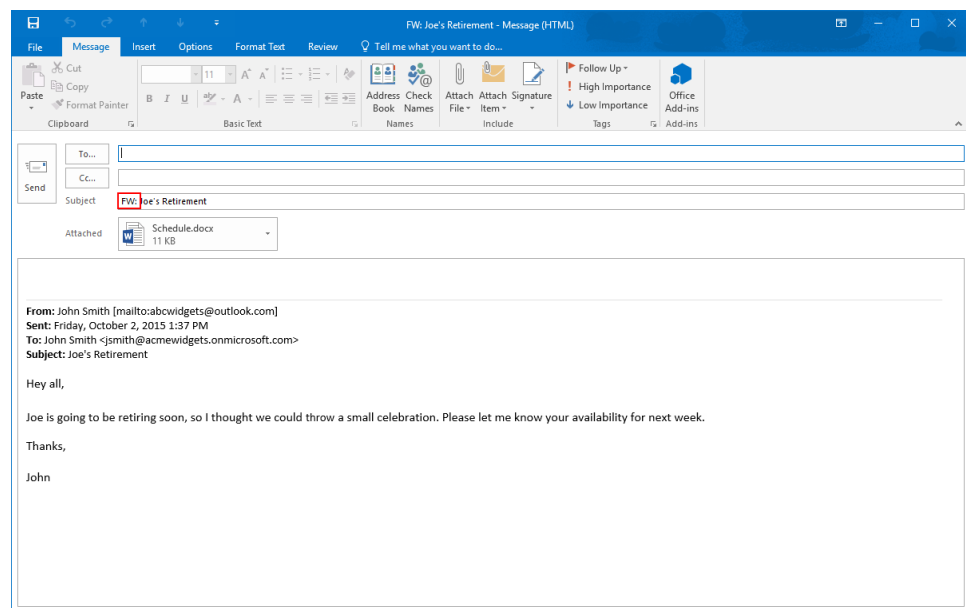


This will open an inline forwarding window in the Reading pane. Enter the message details and click Send.

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

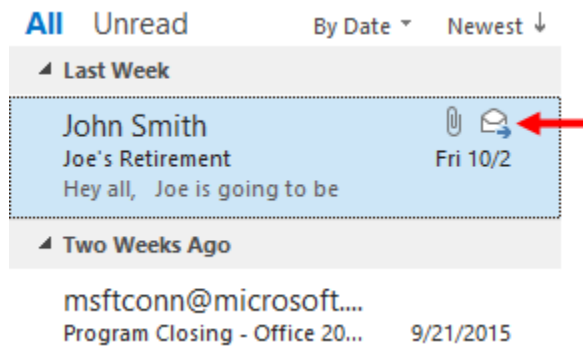


You will then see the Message form with the original message in the main body. Just like when sending an original message, you need to fill in the message recipients using the To, Cc, or Bcc field (if it is enabled):

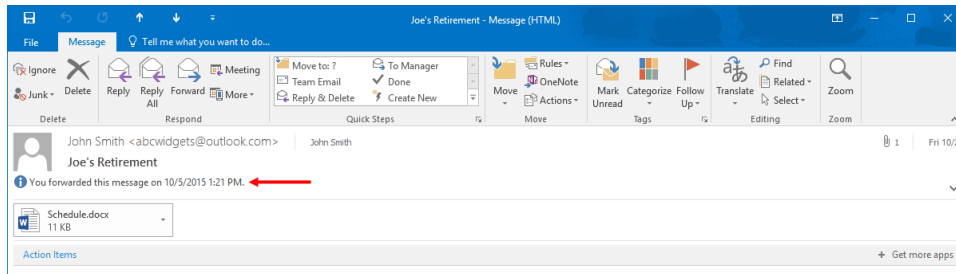


You will also see that the subject field includes the original subject, but the abbreviation "FW:" precedes it. This is to help the recipient understand that this is a forwarded message. Once you have addressed the forwarded message and added any comments to the main body of it, click the Send button.

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



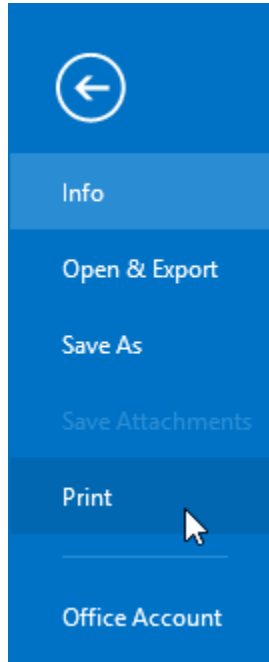
You will also see a message in the Reading pane and in the full-screen message indicating when you forwarded it:



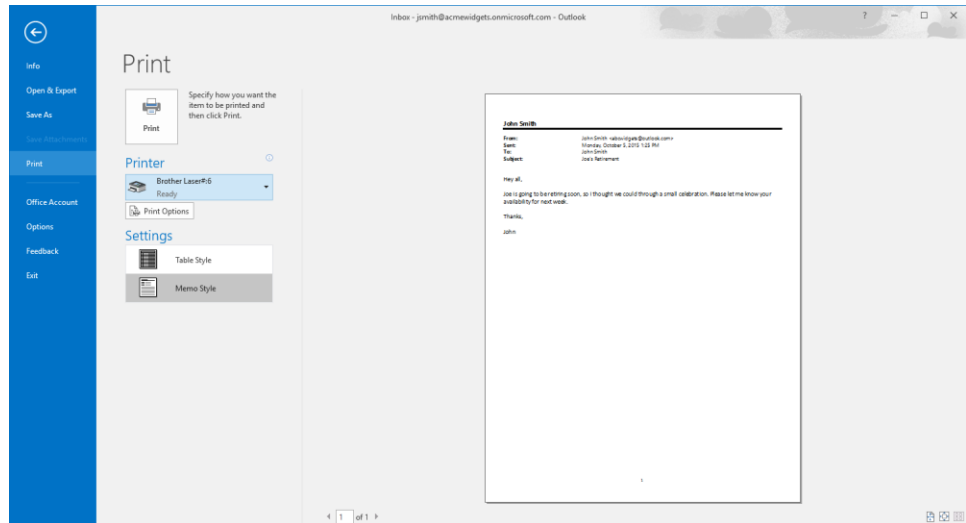
The forwarded item will be saved in the Sent Items folder and accessible in the conversation thread.

PRINT OPTIONS

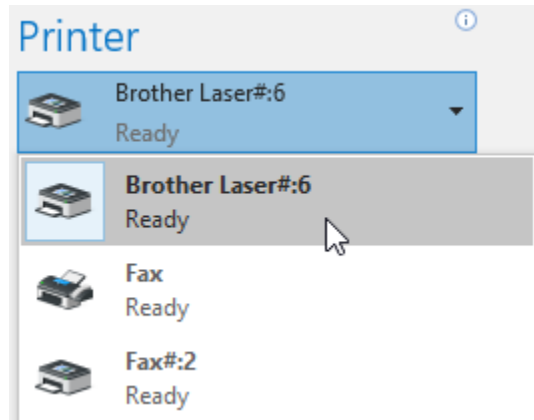
To print an item, first ensure that it is selected. (For example, you could click an e-mail in your Inbox.) Or, you can open the item. In either case, click File → Print:



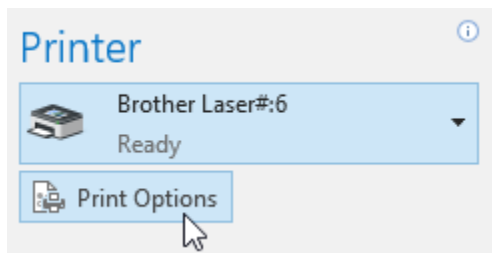
With the Print category selected in the Backstage view, you are given the option to modify various print options:



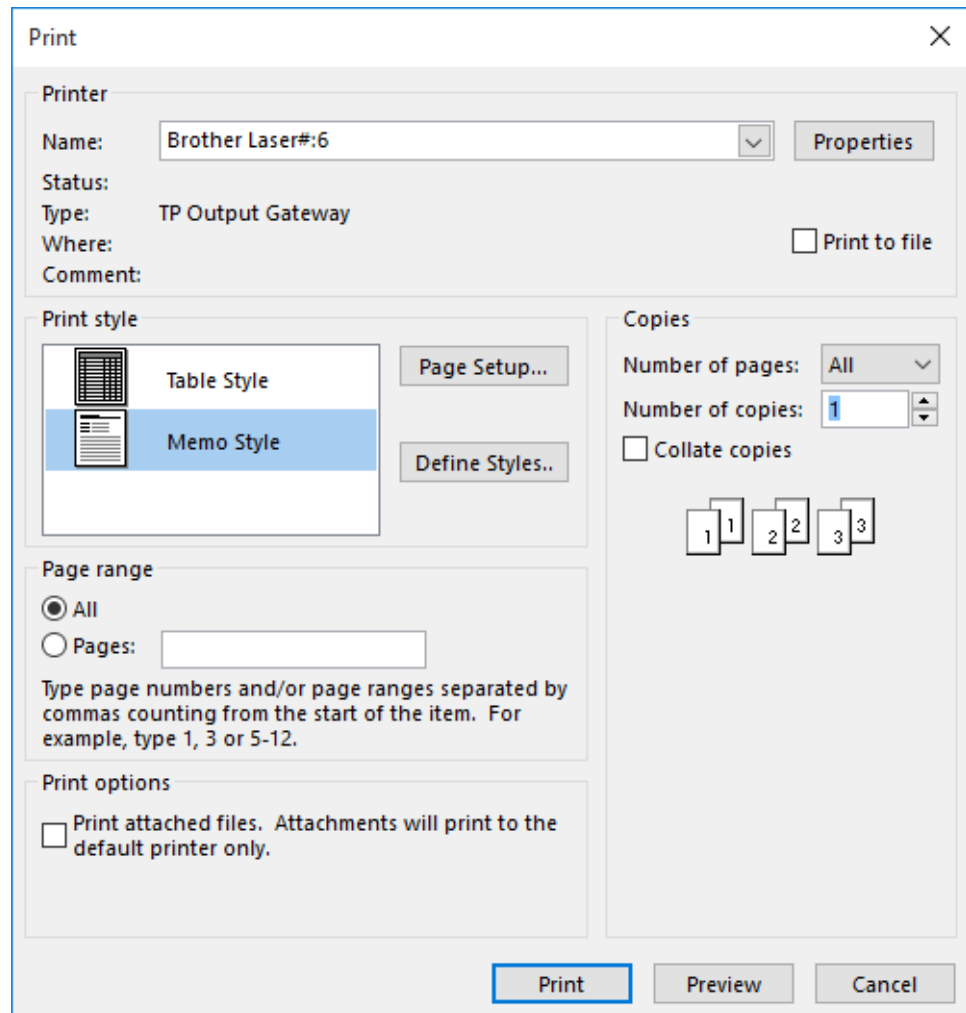
The options that you will see will depend on the type of item that you are printing. However, you will always have access to the Printer drop-down command to choose a printer:



For additional options, click Print Options:



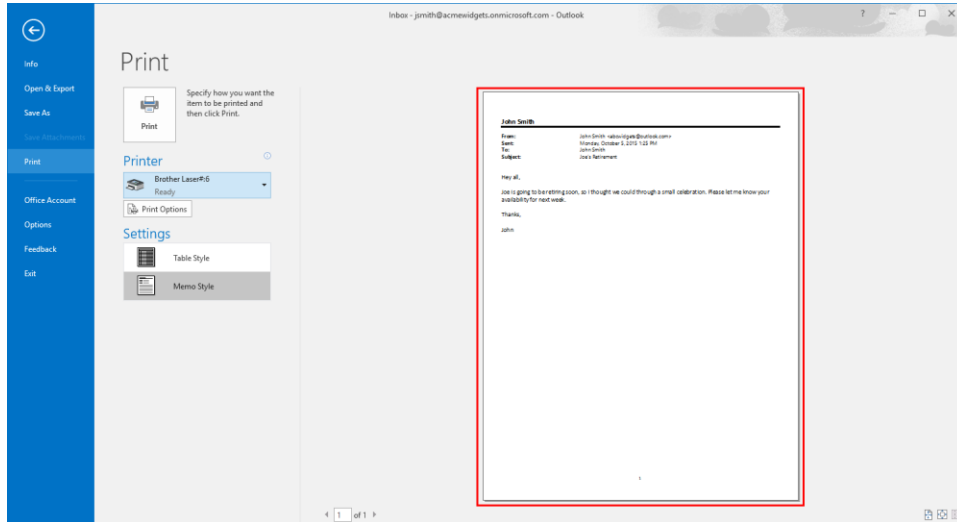
This action will display the Print dialog box:



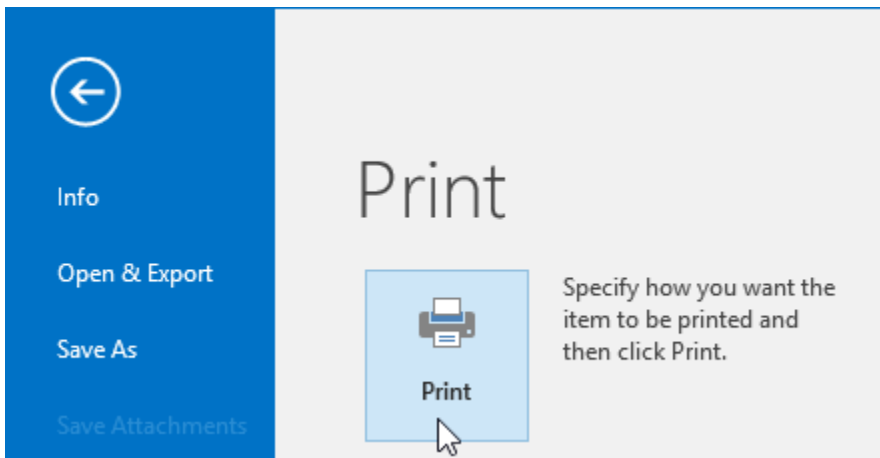
This dialog box lets you choose advanced options, such as page range and number of copies. There are also six other buttons in this dialog, which perform the following commands:

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

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

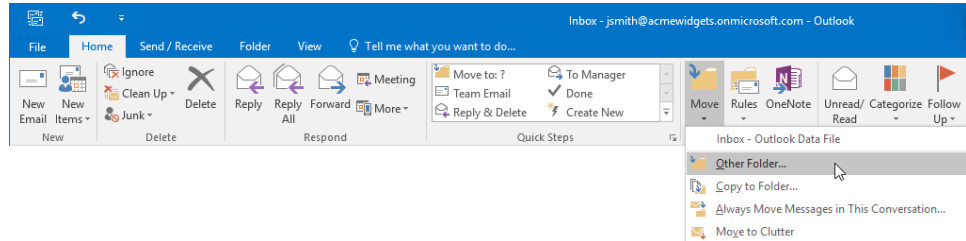


When you are ready to actually print the currently selected item, click the Print command:

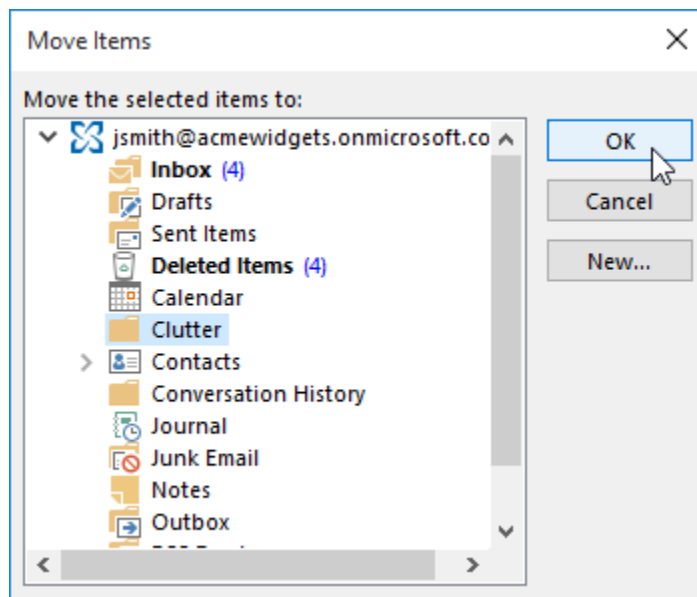


MOVING MESSAGES

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

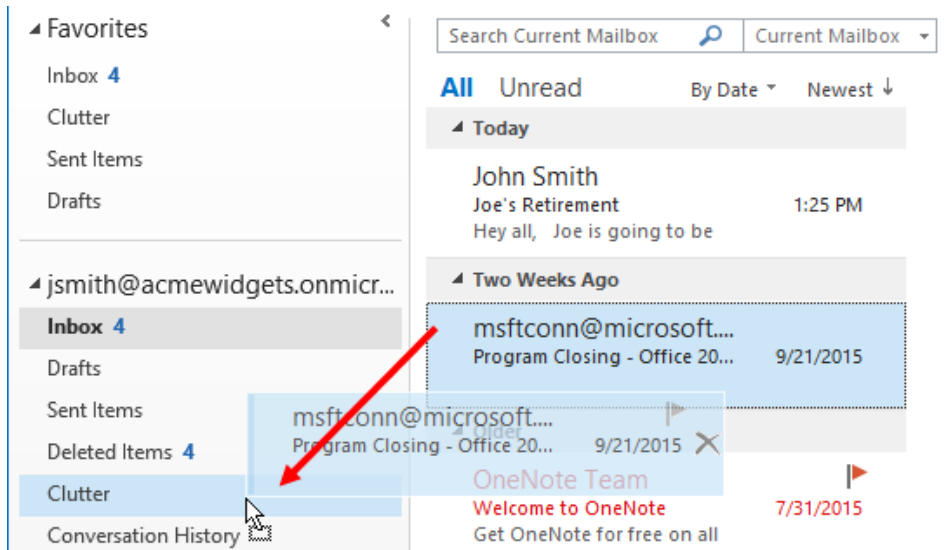


This action will display the Move Items dialog box where you are able to select the destination folder. Click OK to complete the move:



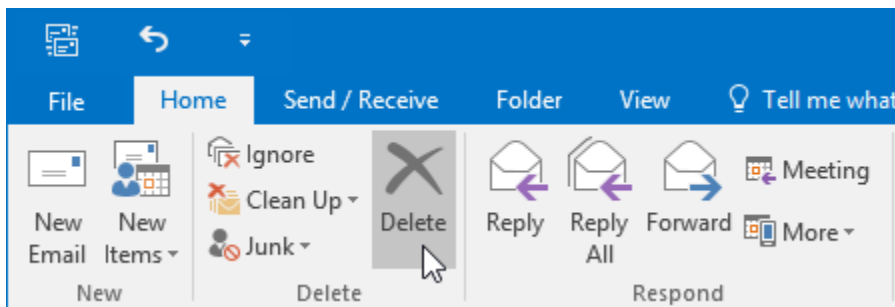
(Once you have selected a folder from this dialog box, it will be accessible directly from the Move menu.)

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

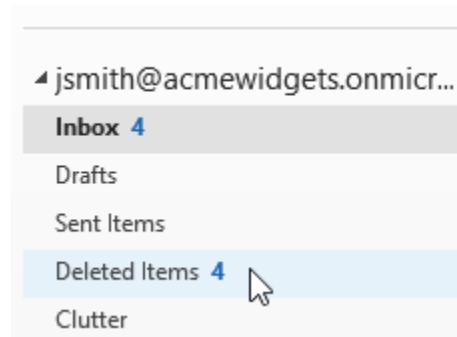


THE DELETED ITEMS FOLDER

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

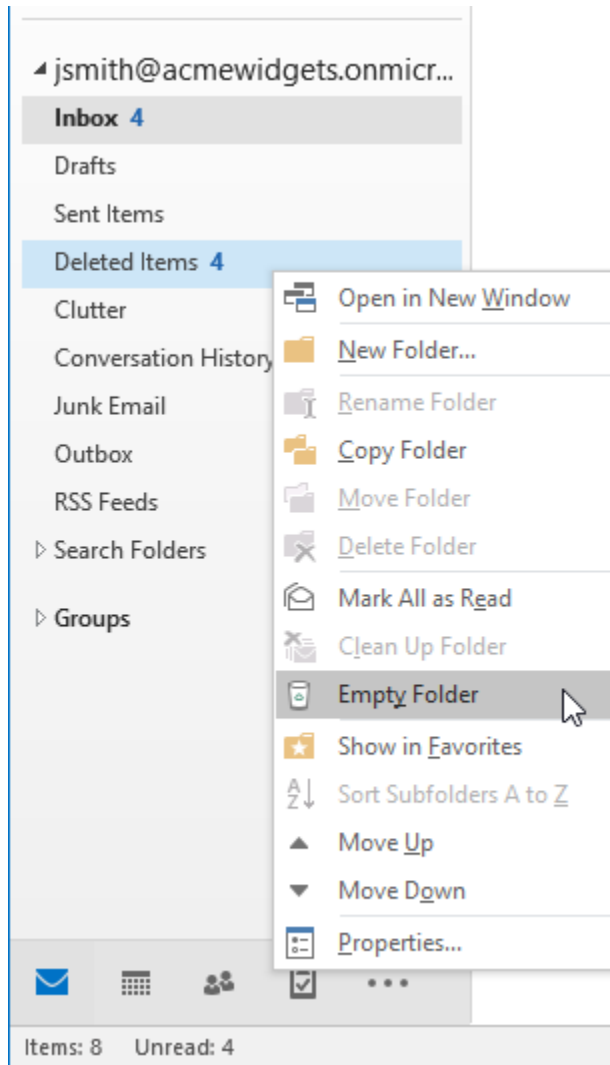


When an item is deleted, it is placed inside the Deleted Items folder. To open this folder, click the Deleted Items folder within the Navigation pane:

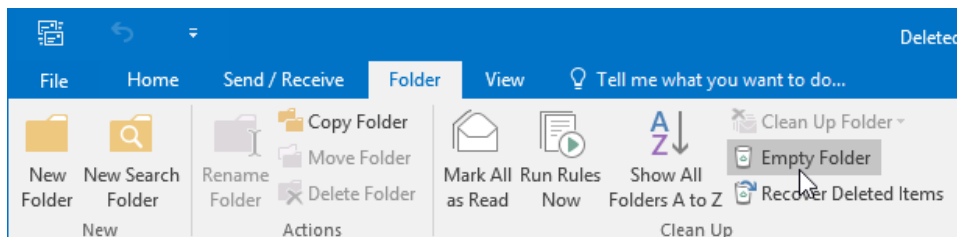


The contents of the Deleted Items folder will then be listed inside the working area. From there, you can complete the same process as described above to permanently delete any messages inside this folder.

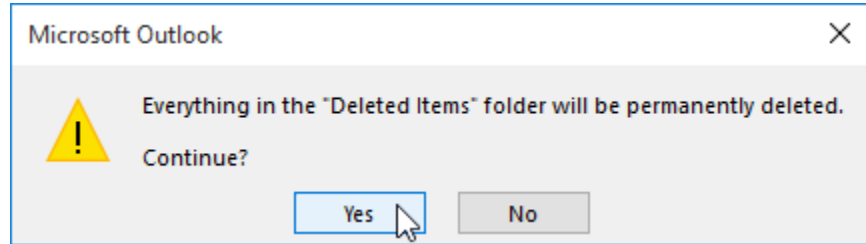
To delete all of the messages in this folder, right-click on the Deleted Items folder and click Empty Folder:



Or, click Folder → Empty Folder:

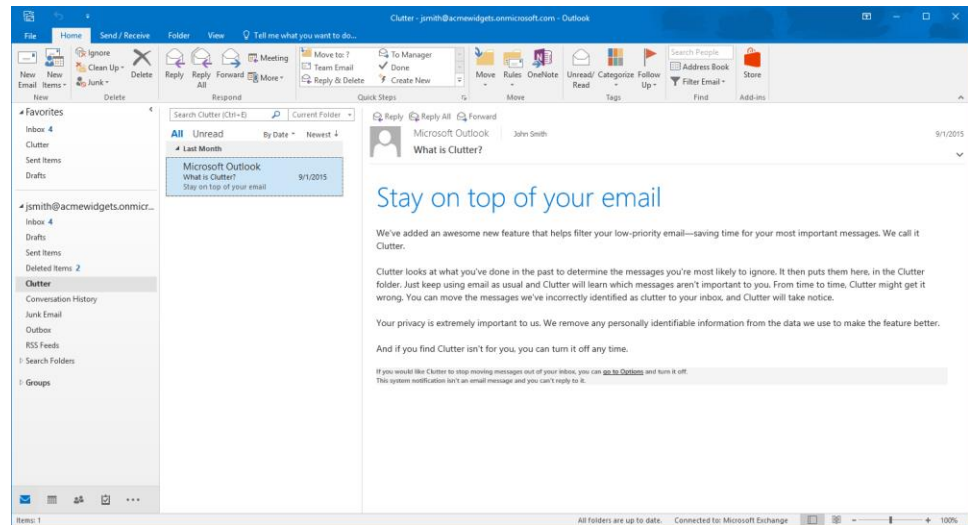


A dialog box will then be displayed that asks you to confirm your choice to delete all of the items inside the Deleted Items folder. Click Yes to complete the action:



THE CLUTTER FOLDER

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



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

ACTIVITY 1-2

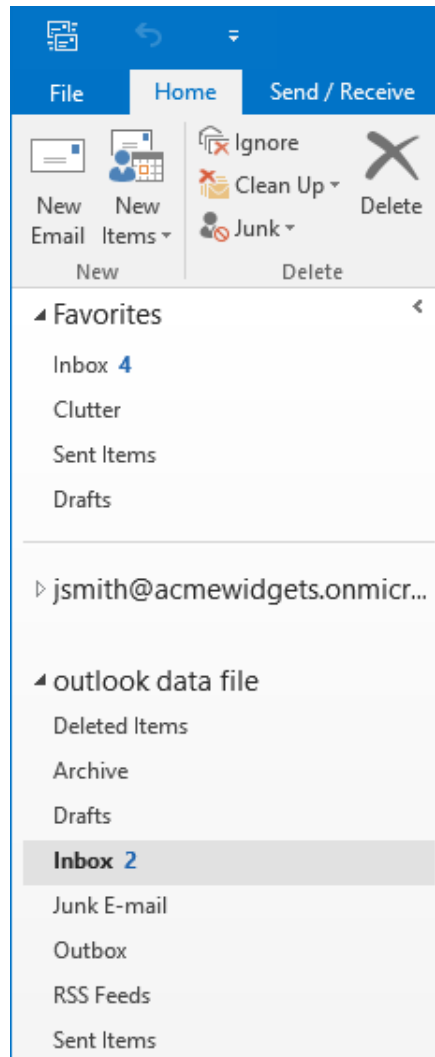
Performing Basic E-mail Functions

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

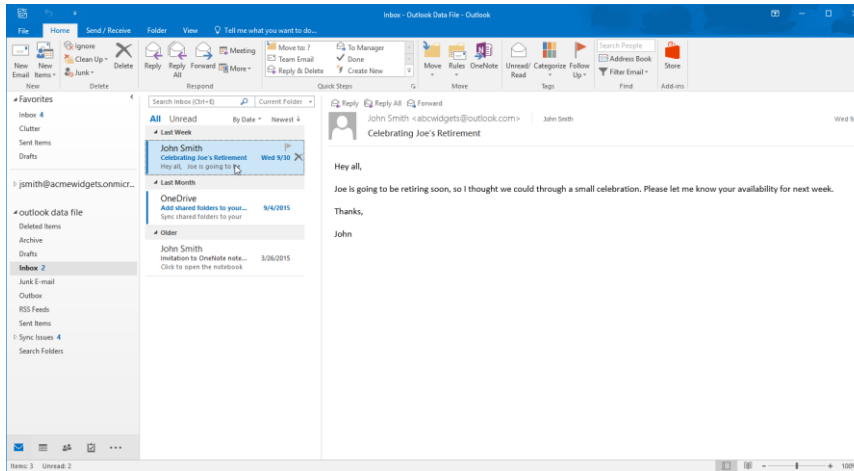
- Click the File menu, click Open & Export, and click Open Outlook Data File.
- Browse to Lesson 1.pst in the Exercise Files folder. Click OK.

Students should pair up with another classmate for this activity.

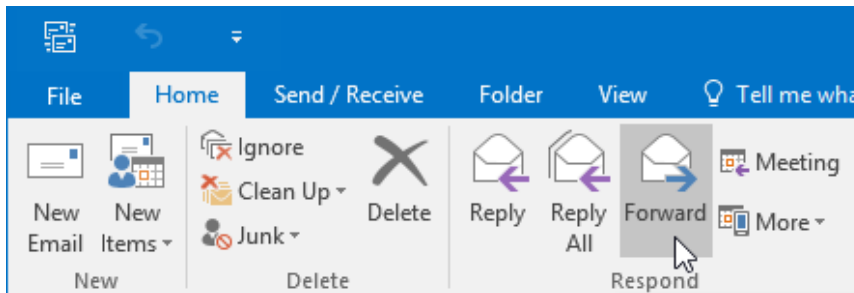
1. To begin, open Outlook 2016. Ensure that the Inbox folder in the Outlook Data File is displayed:



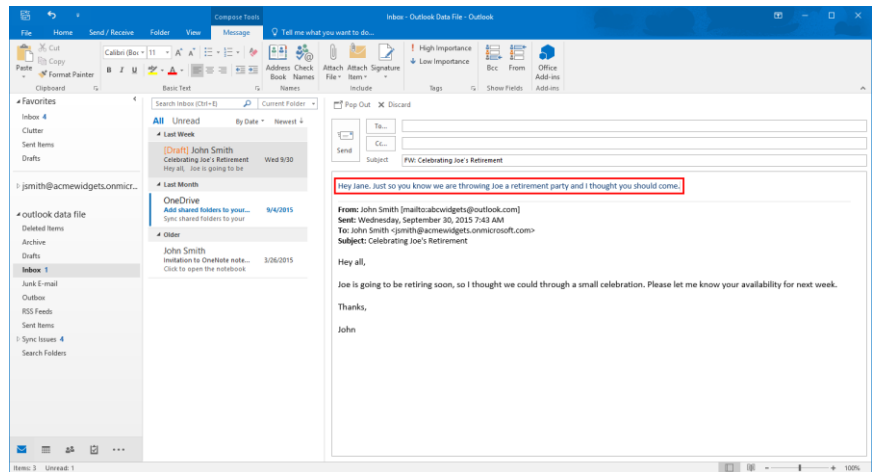
2. If it is not selected already, click to select the message with the subject line “Celebrating Joe’s Retirement.” Review this message inside the Reading pane:



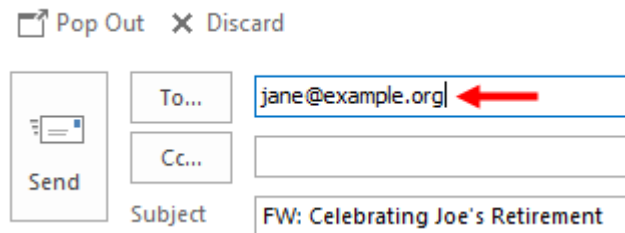
3. Forward this message to your partner by clicking Home → Forward:



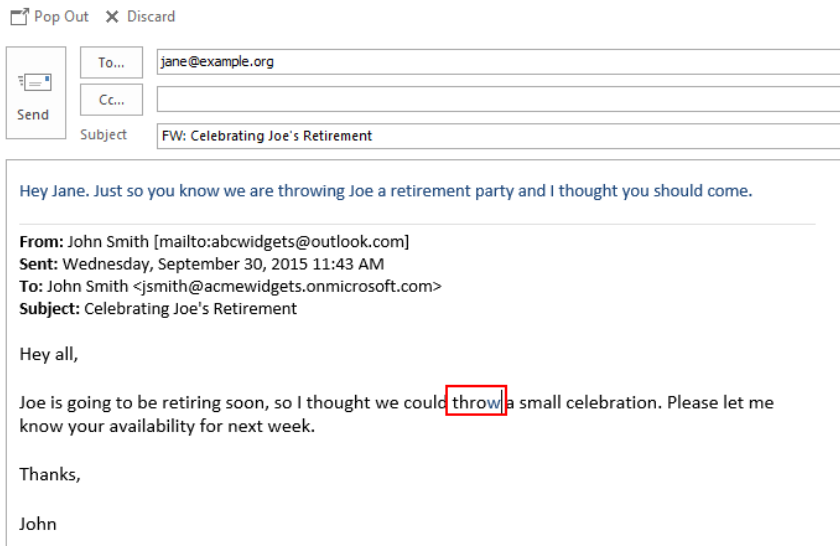
- The Message form will be displayed with the original message shown in the body. Above the separating line in the body, type the following message: “Hey [partner name]. Just so you know we are throwing Joe a retirement party and I thought you should come.”



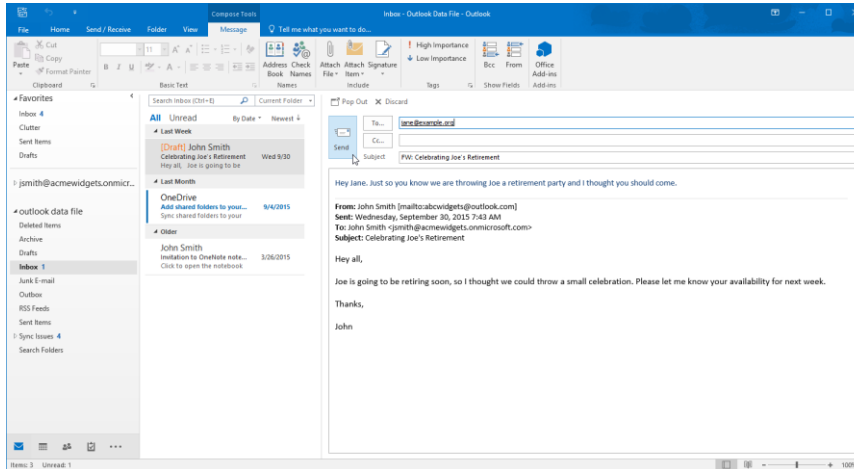
- Inside the To field, type the e-mail address of your partner:



6. Fix the typo in the original message:



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



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

TOPIC C: Use Outlook Help

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

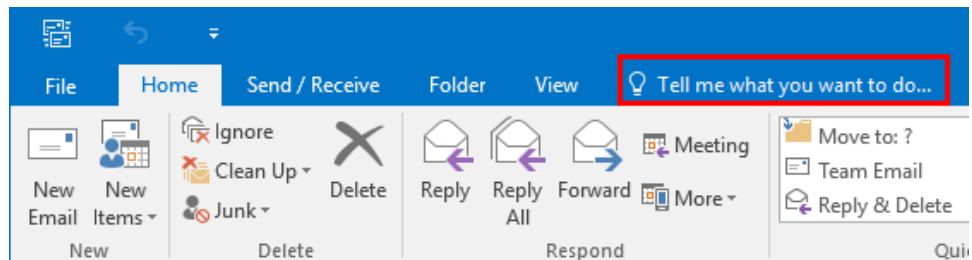
Topic Objectives

In this topic, you will learn:

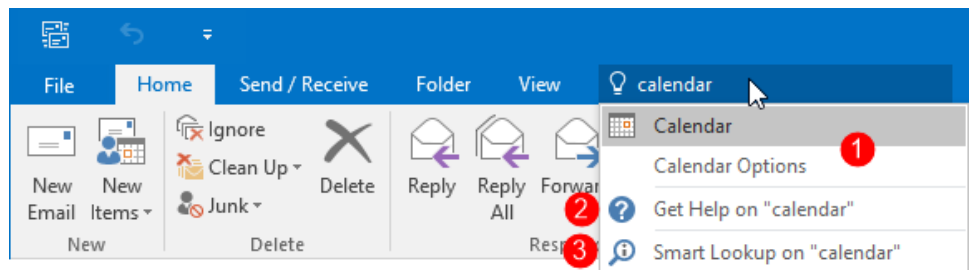
- How to use the Tell Me feature
- How to access advanced help options

USING TELL ME

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



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

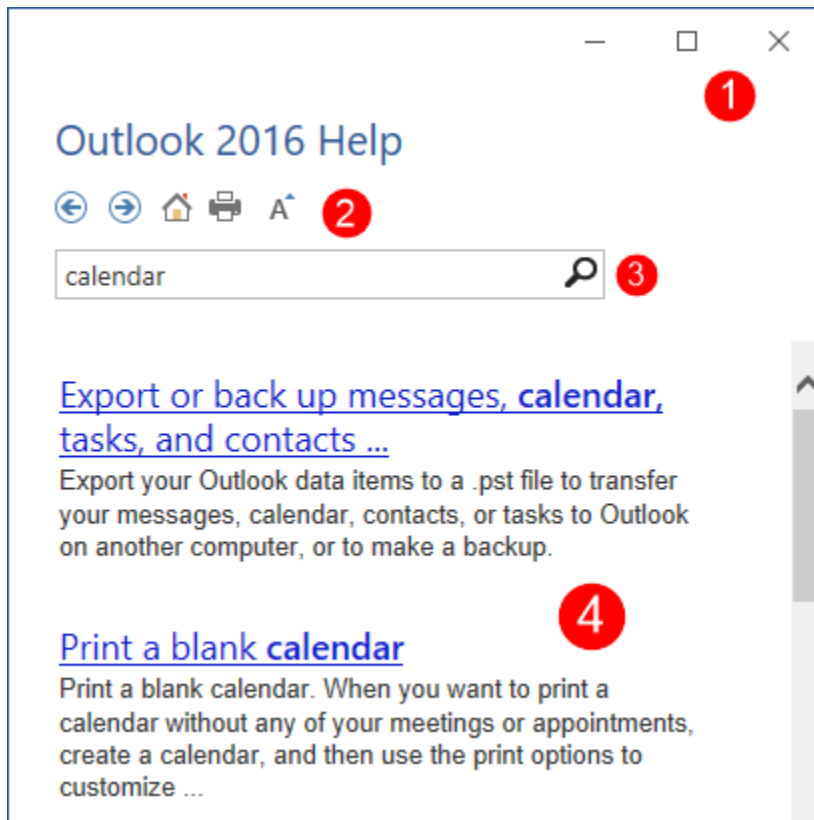


At the top, you will usually see shortcuts to **related commands (1)**. (If a command is greyed out, it means that it is not currently available.) Next,

you will see an option to open the **traditional Help window (2)**. Finally, there is usually an option for **Smart Lookup (3)**, which will search for the term(s) using the Insights feature.

ACCESSING ADVANCED HELP OPTIONS

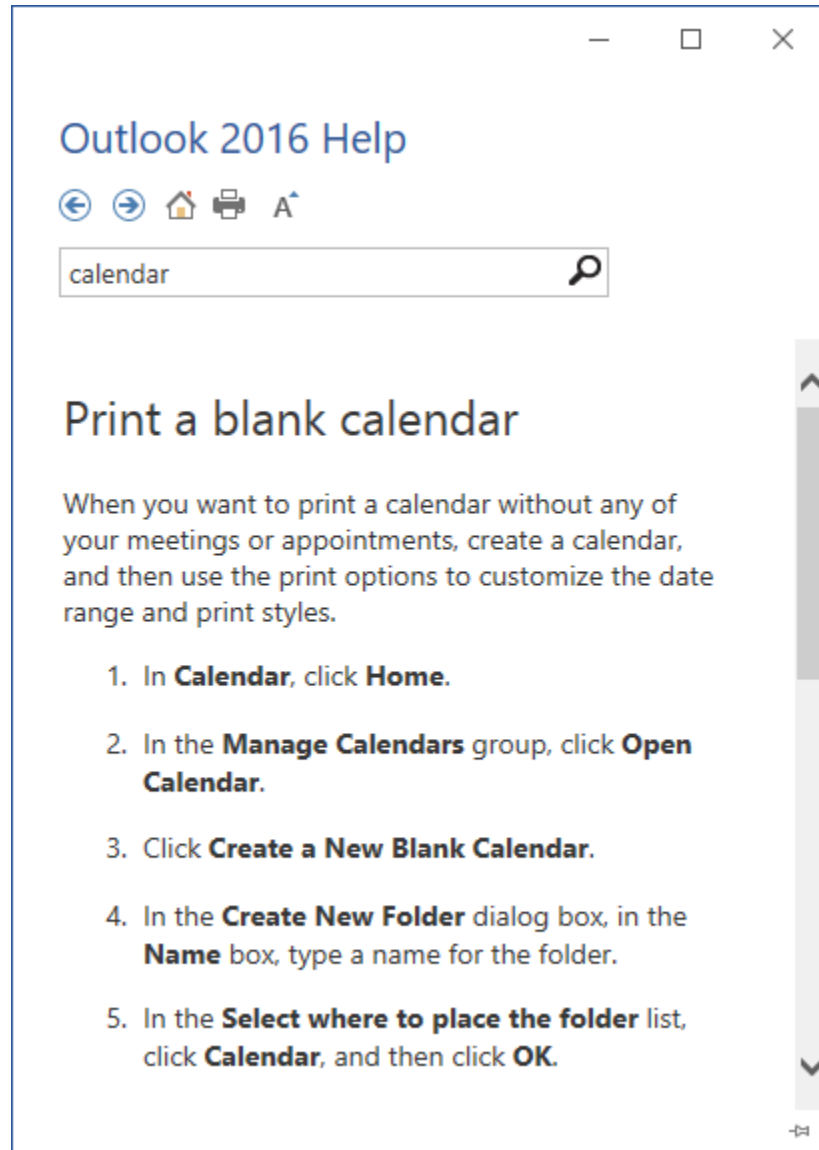
When you choose a “Get Help” entry from the Tell Me results menu, you will see the traditional Help window:



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

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






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



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

The Help Toolbar

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

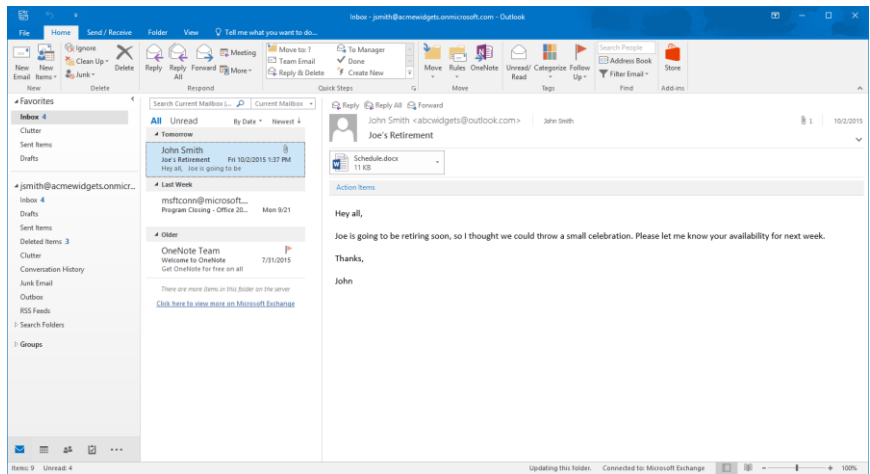
Back		Move back one step at a time through the help topics you have previously read.
Forward		If you click the Back button, the Forward button will become active. This lets you step forward through the topics you have visited.
Home		Click this button to return to the default Help page.
Print		Prints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

ACTIVITY 1-3

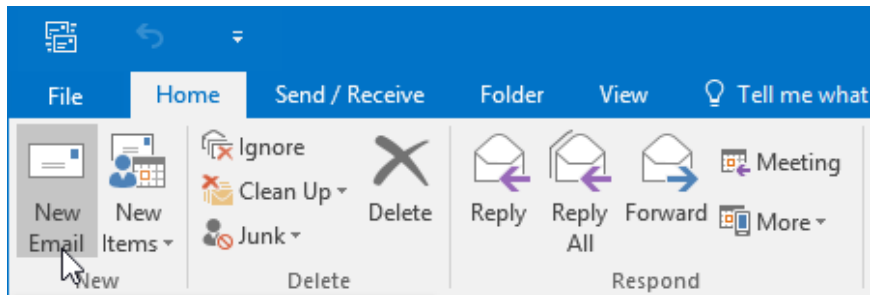
Getting Help in Microsoft Outlook 2016

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

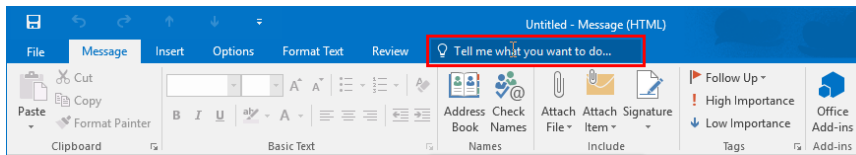
1. To begin, open Outlook 2016. Ensure that your Inbox folder is displayed:



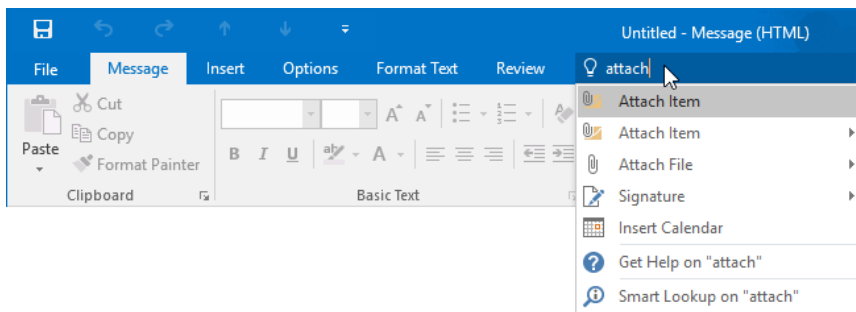
2. Click Home → New Email:



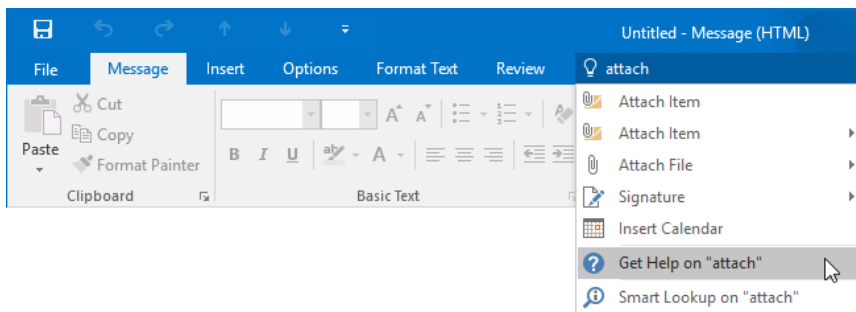
3. The new message form will now be displayed in a separate window. Click inside the “Tell Me” field at the top of the ribbon interface:



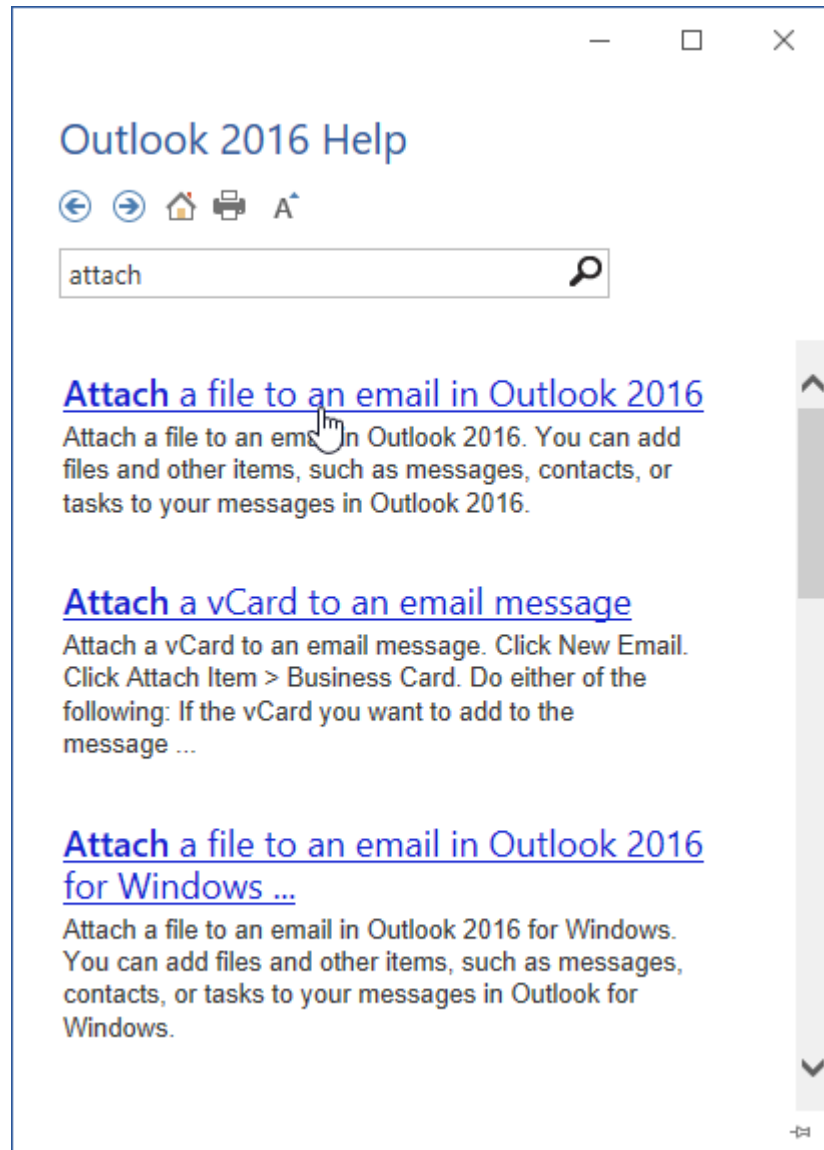
4. Type “attach:”



5. Click the “Get Help” link:

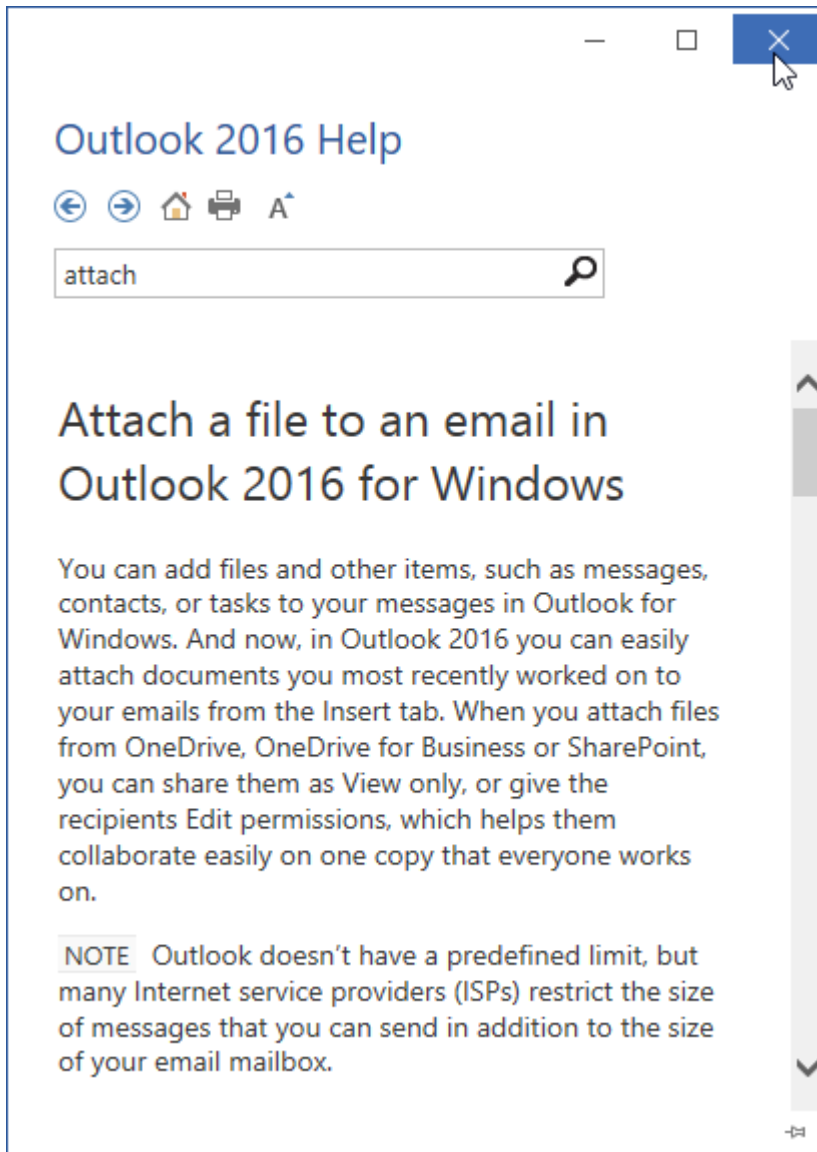


6. The full Outlook 2016 Help window will open. Click the “Attach a file to an email in Outlook 2016” link:

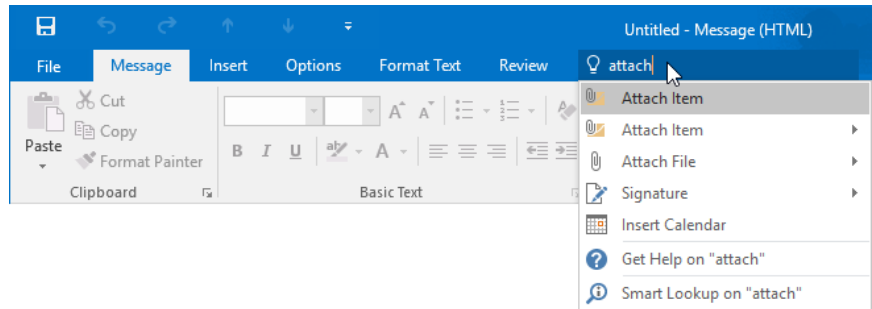


(If you do not see this link, you can choose any other article.)

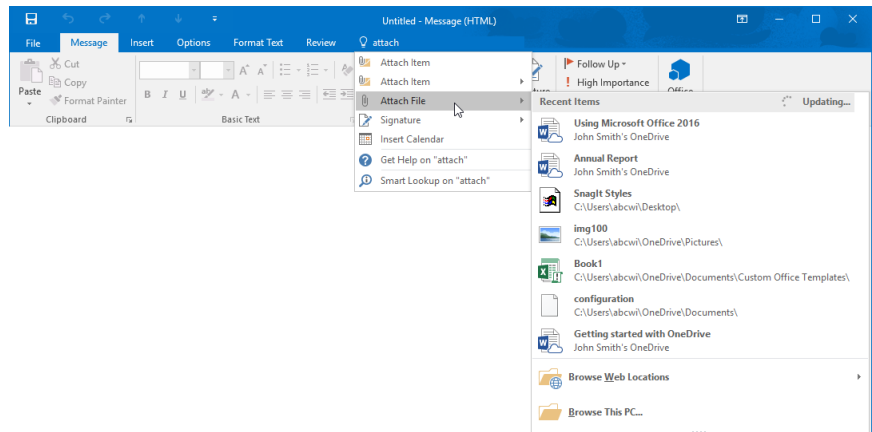
7. Scan through this article. When you are finished, close the Help window:



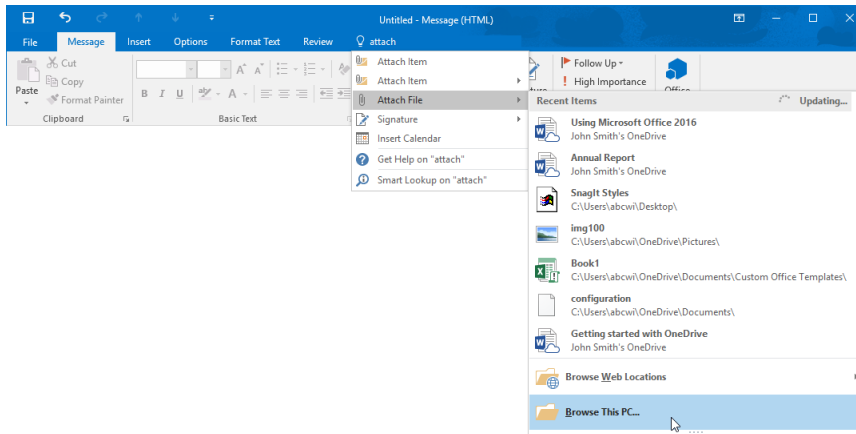
8. Type “attach” in the Tell Me field once again:



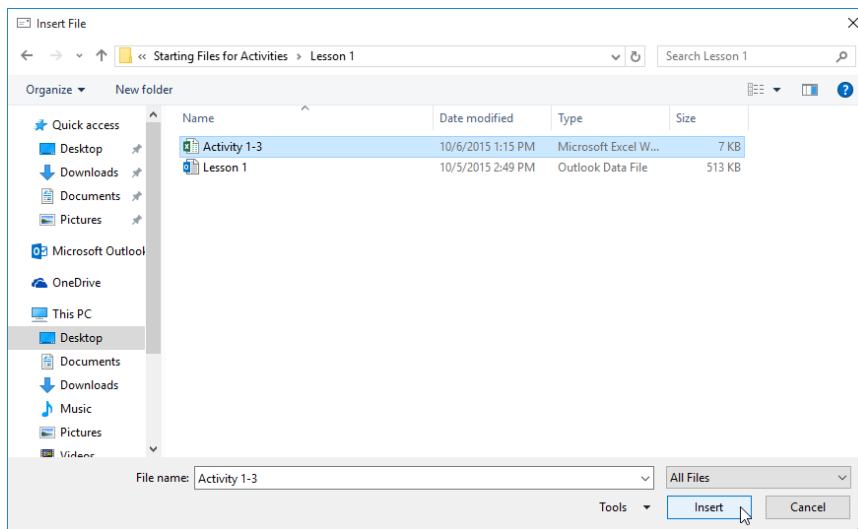
9. This time, move your mouse over the Attach File option. You will see a list of your most recently accessed files, as well as options to browse the files on your PC and online:



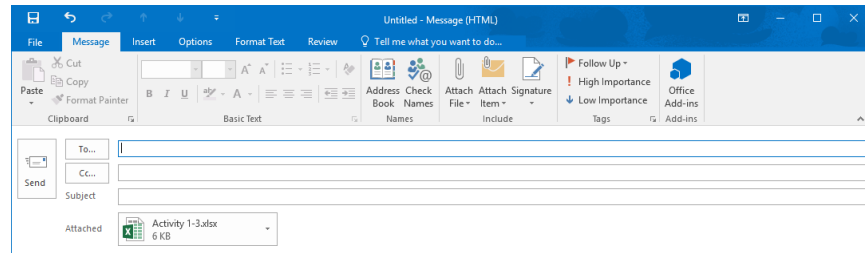
10. Click Browse This PC:



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



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



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

Summary

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

REVIEW QUESTIONS

1. What kind of application is Outlook 2016?
2. How do you access Backstage view?
3. What is the difference between Reply and Reply All?
4. What is the Clutter folder?
5. What options can be provided when using the Tell Me feature?

LESSON 2: COMPOSING MESSAGES

Lesson Objectives

In this lesson you will learn how to:

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

TOPIC A: Create an E-mail Message

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

Topic Objectives

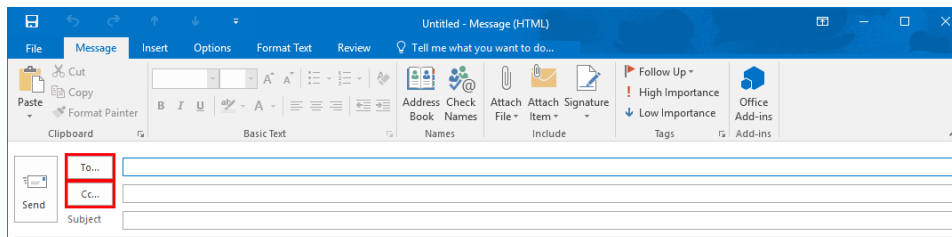
In this topic, you will learn:

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

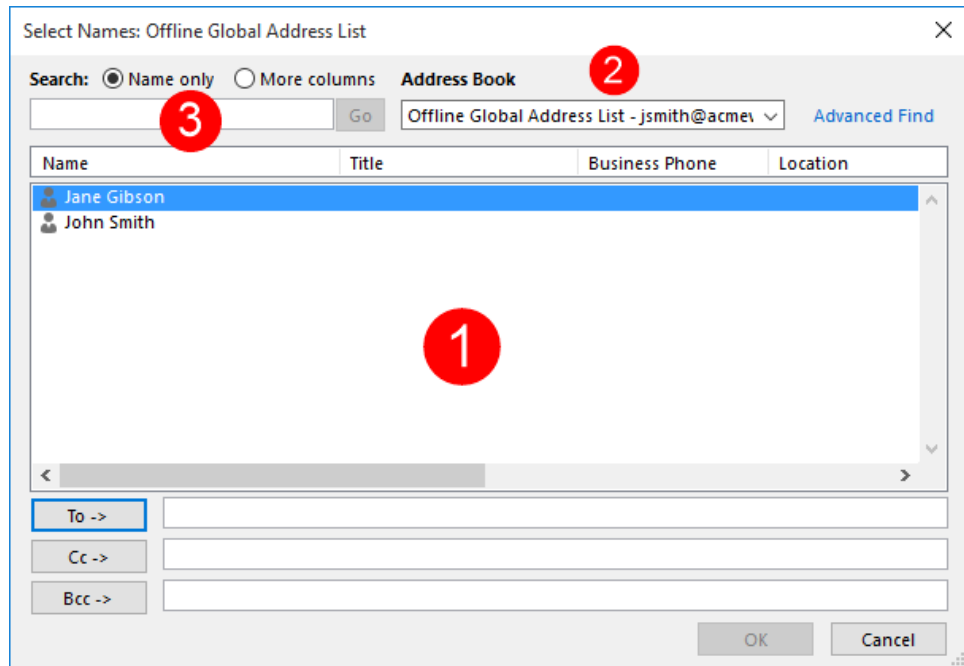
THE ADDRESS BOOK

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

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



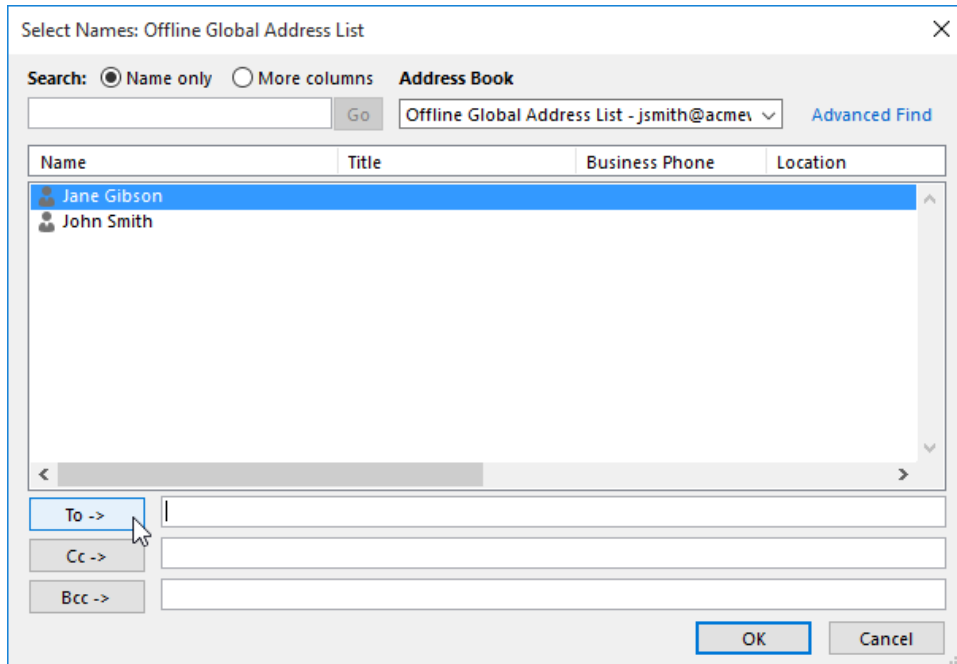
After clicking on any of these buttons, the Select Names dialog box will be displayed:



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

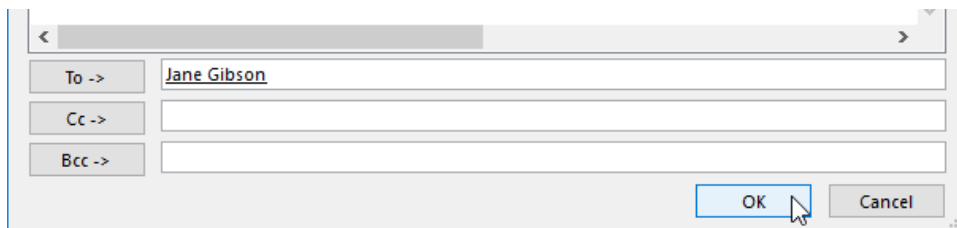
Near the top left-hand corner of this dialog box, you will see the **Search field (3)**. By typing a name into this text box, you are able to jump to a particular contact for quick access. This is especially useful when working with large contact lists.

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

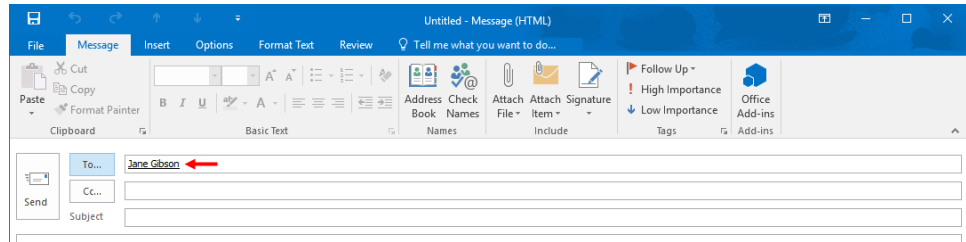


(Note that you can select multiple contacts at once by holding down the Ctrl key on your keyboard and clicking on each contact.)

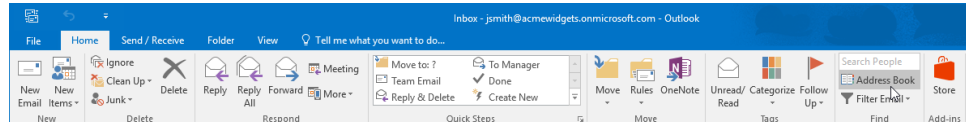
After having added contacts to the fields in which you would like them to appear in the message, click the OK button:



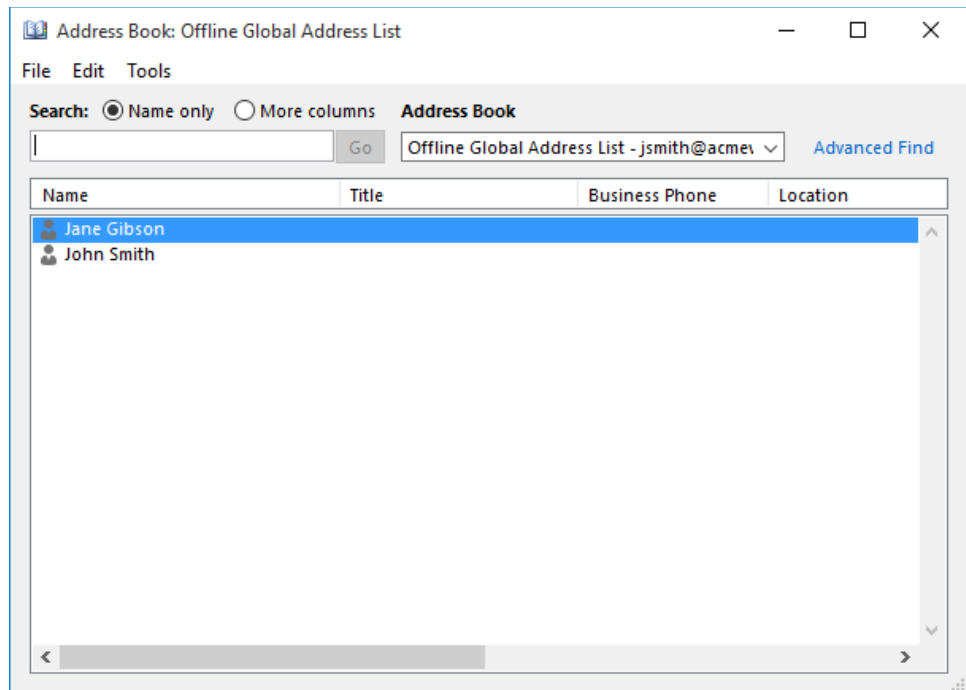
Back in the message, you will see the contact(s) that you selected appear in the appropriate fields:



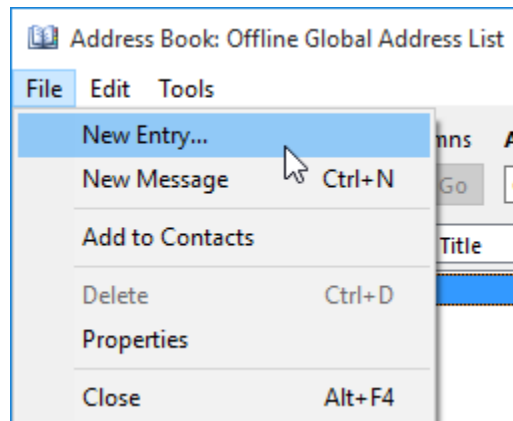
A slightly different version of the address book can also be accessed at any time by clicking Home → Address Book from the main Outlook window:



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



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



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

MICROSOFT EXCHANGE SERVER

Microsoft Exchange Server is a messaging system that provides mail server and user collaboration features to a business environment. Fundamentally, it is an application that runs on a server operating system (such as Windows 2000 Server or Windows Server 2003). An online version is also available via Office 365 services. Either tool is very useful for administrators to manage groups of computers.

Many businesses that use Microsoft Exchange Server to manage their e-mail server also ask that employees use Microsoft Outlook to receive e-mail. The two products used together can provide powerful functionality, with extra features like delegates, public folders, and the Out of Office Assistant.

GLOBAL ADDRESS LIST

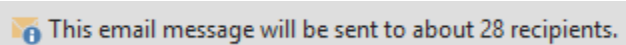
If your organization is using Microsoft Exchange Server, the Global Address List will include all e-mail users in your organization, shared resources (such as conference rooms), and contact groups (such as departments or teams). The Global Address List is created and maintained by your organization's system administrator and cannot be modified by a regular user.

You are able to access this list while in the address book by clicking the Address Book drop-down menu and choosing “Global Address List.” Note that only users who have an e-mail account with the Exchange server in question can access the Global Address List.

MAILTIPS

MailTips are a unique feature that are only available to Outlook users who have an e-mail account with an Exchange server or Office 365. It is used to provide feedback while you are composing a reply or new e-mail message. This includes notifying you if the message’s recipient list consists of a large amount of users or if there will be any problems sending the message.

Such notifications are displayed between the ribbon and the address field in your message:

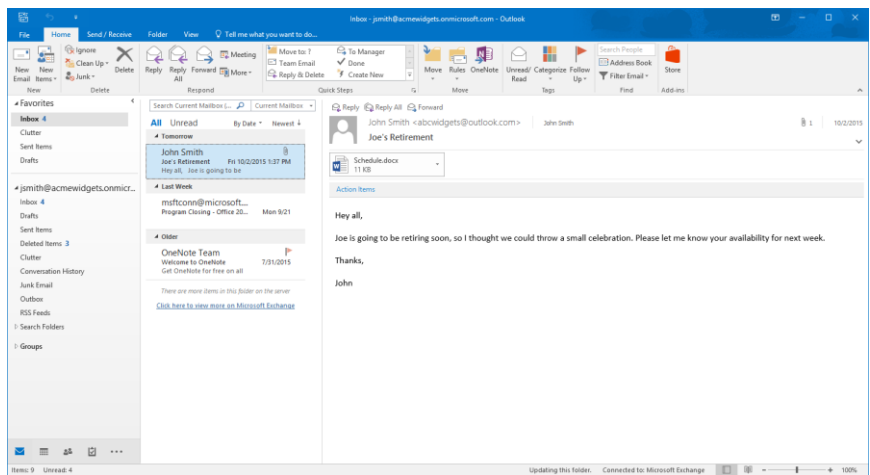


ACTIVITY 2-1

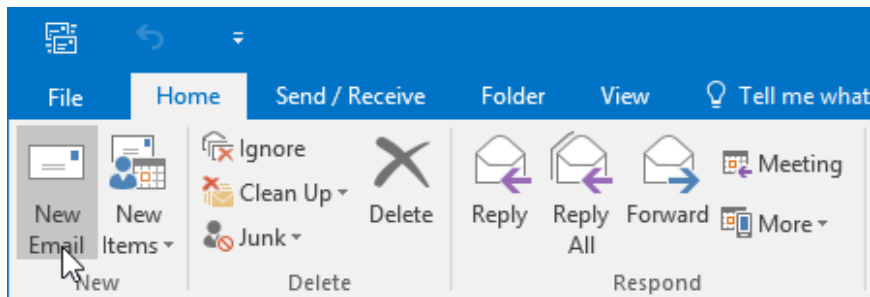
Creating an E-mail Message

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

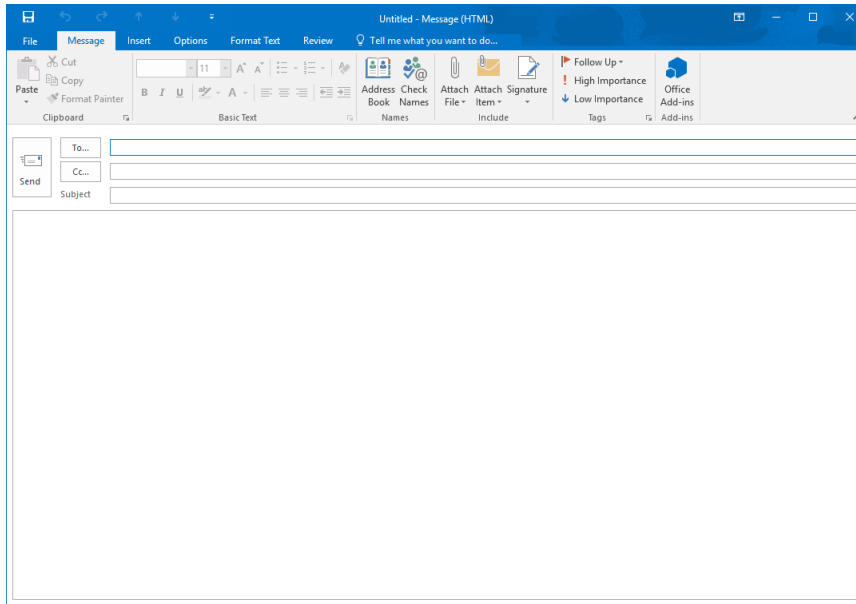
1. To begin, open Outlook 2016 and ensure that the Inbox folder is displayed:



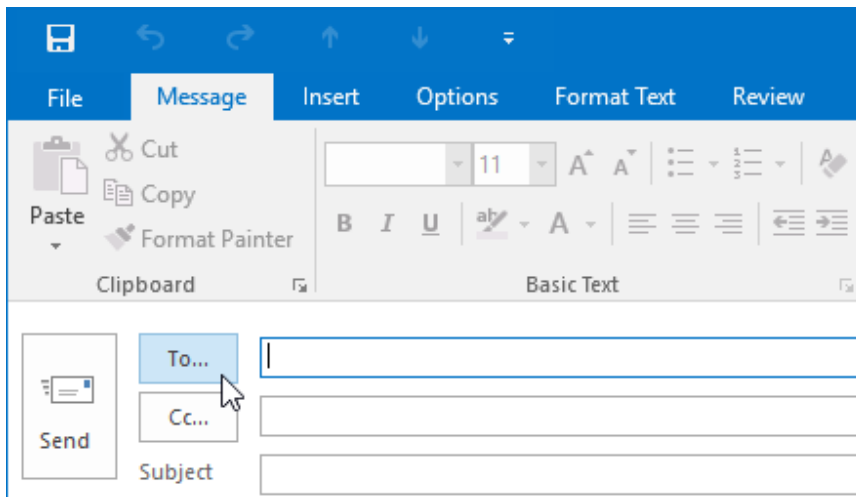
2. Click Home → New E-mail:



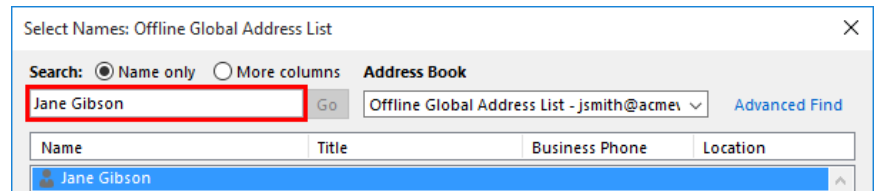
3. A new message will be displayed:



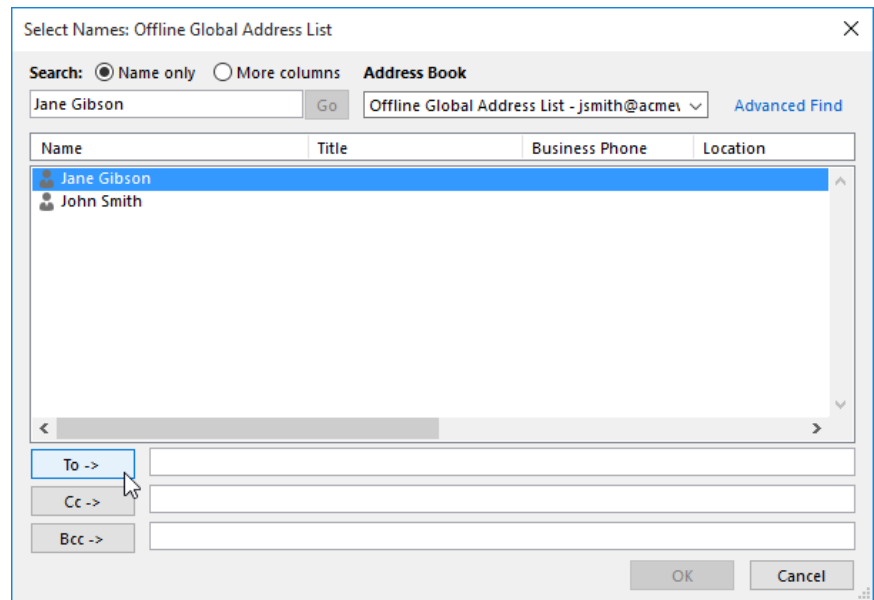
4. First, you need to address this new e-mail to your colleague. Click the To button:



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

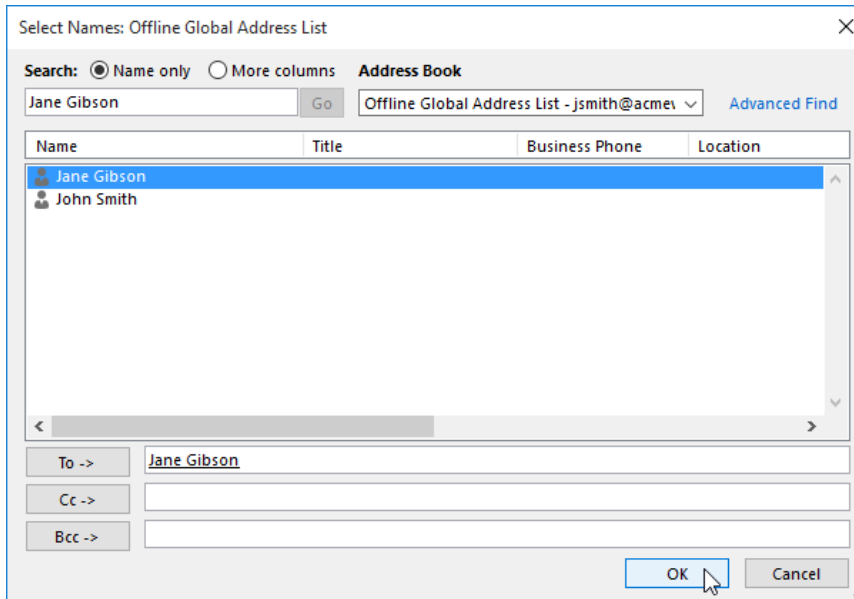


6. From the list of names, ensure that your partner's name is selected. Click the To button in the lower half of the dialog box:

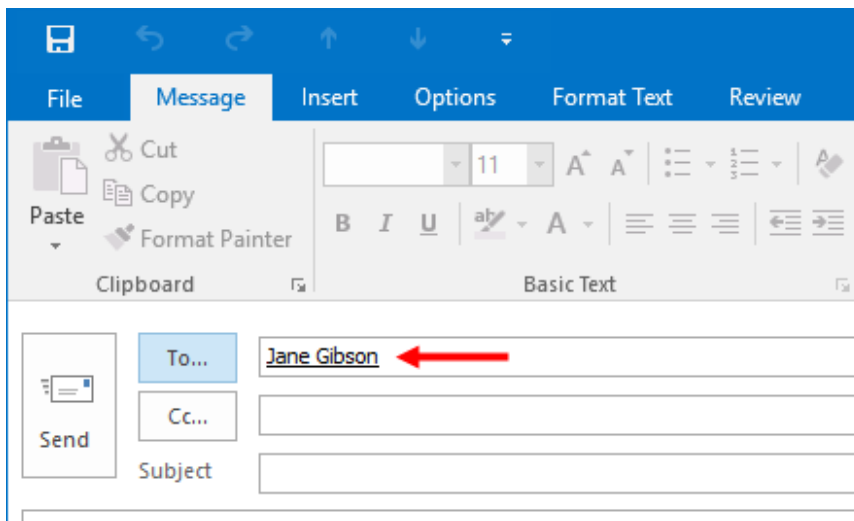


If you do not see your partner's e-mail address, click the Cancel button and skip to Step 8.

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

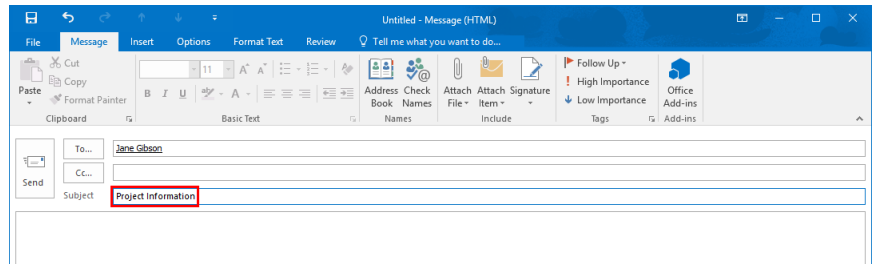


8. Returning to the message window, you will see the e-mail address and name of the contact that you selected in the To field:

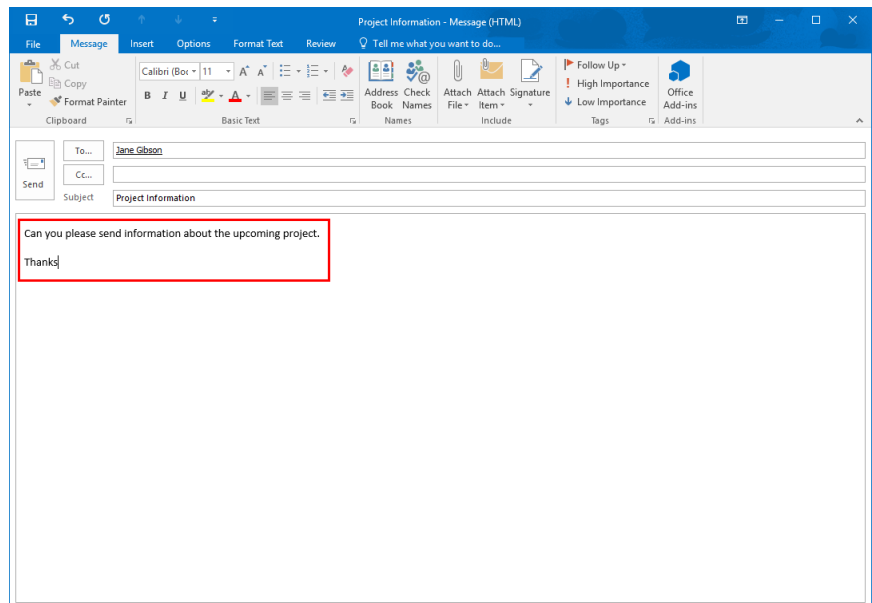


If your partner was not listed in the Select Names dialog box, type their e-mail address into the To field now.

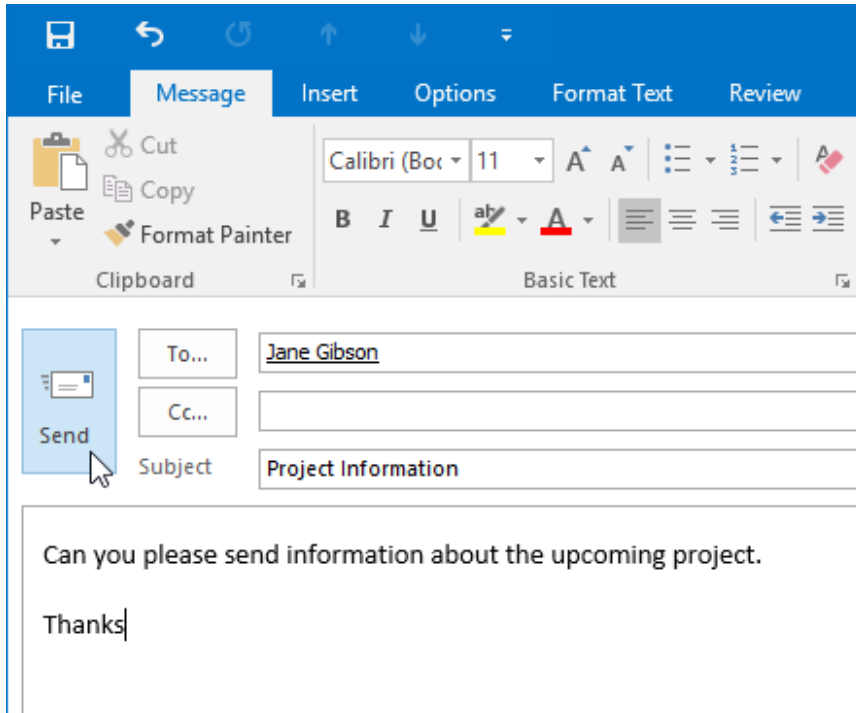
9. Inside the Subject field, type “Project Information:”



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



11. Click the Send button:



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

TOPIC B: Check Spelling and Grammar

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

Topic Objectives

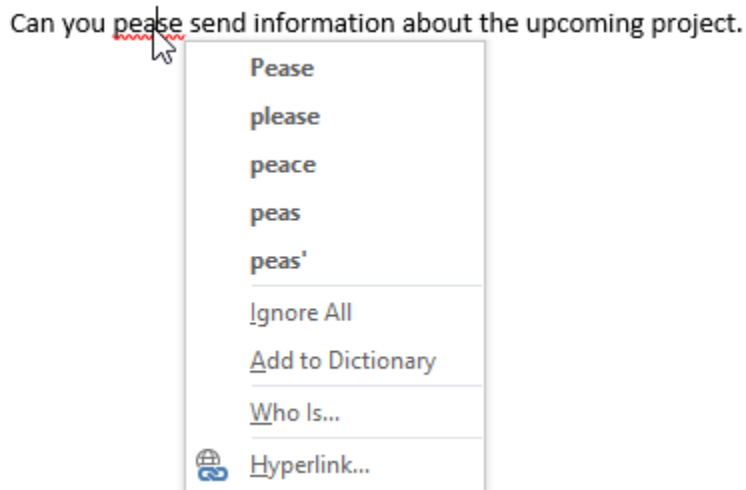
In this topic, you will learn:

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

THE AUTOCORRECT FEATURE

Enabled by default, the AutoCorrect feature checks for common spelling and grammar errors as you type. This means that if you make a mistake while typing, AutoCorrect will automatically correct the error to what it thinks it will be. If AutoCorrect is unsure of what the correction should be, the error will be identified by a wavy colored underline (red if it is a spelling error or blue if it is a grammatical error).

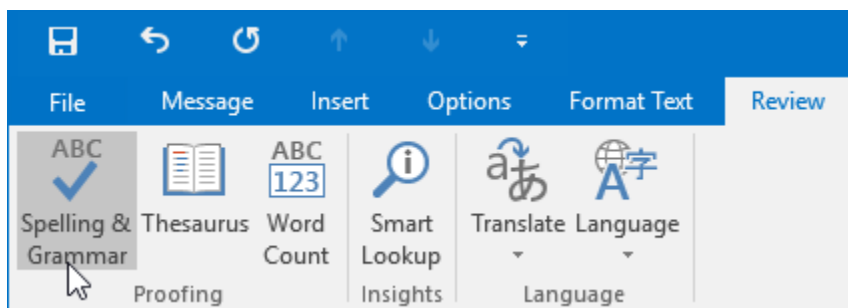
In situations where an error is identified by a colored underline, you can right-click on the word and choose from one of the possible corrections that are listed in the context menu:



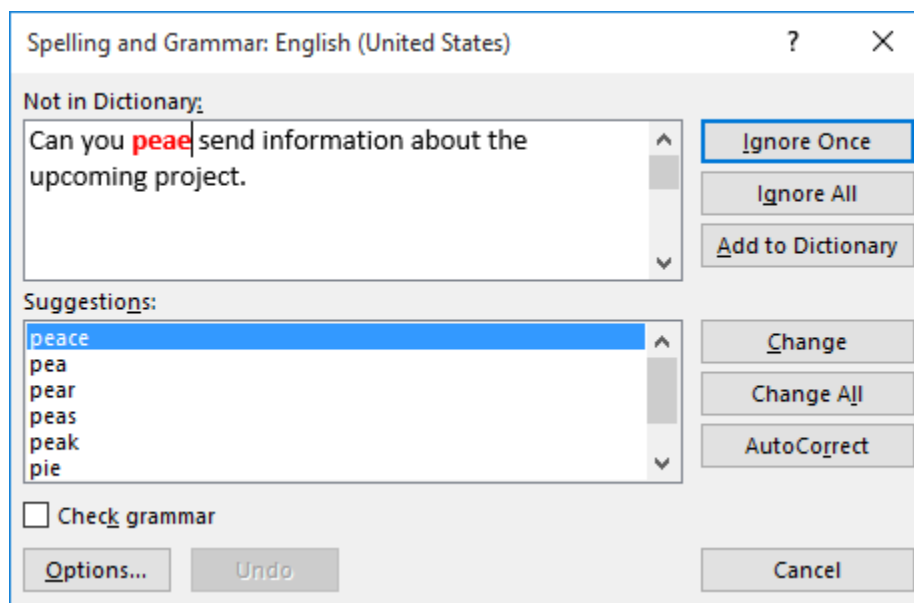
Also in the context menu, you have the option to ignore the error or add it to the dictionary so that it is never flagged again.

THE SPELLING AND GRAMMAR CHECKER

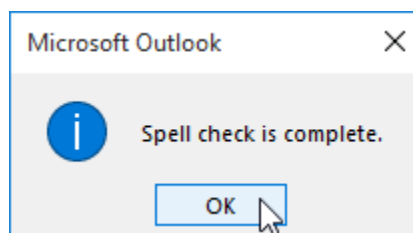
While the AutoCorrect feature will find and fix many errors, performing a full spelling and grammar check will help you fix any other problems. To perform this check, click Review → Spelling & Grammar, or press F7 on your keyboard:



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



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



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

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

COMPONENTS OF THE SPELLING AND GRAMMAR DIALOG BOX

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

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

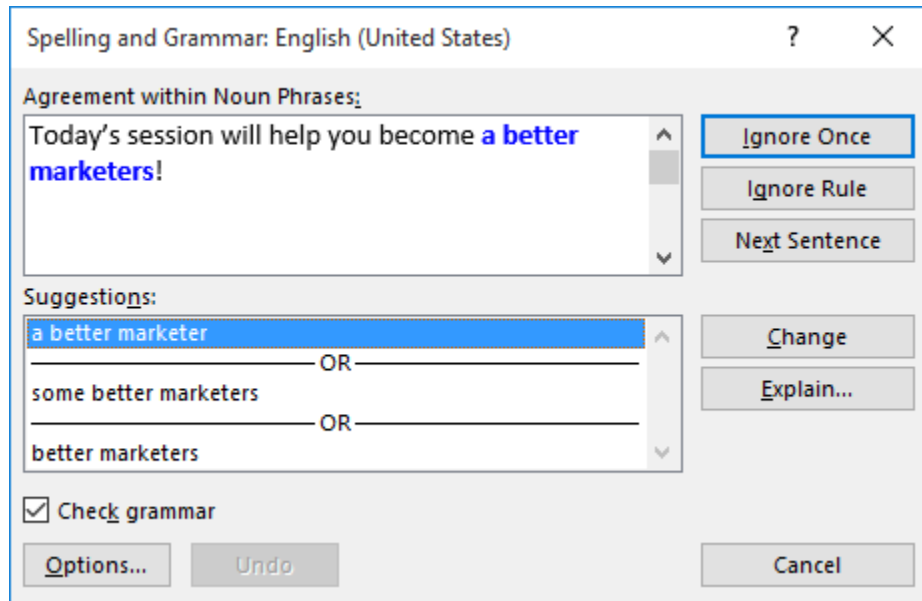
Ignore Once	Ignore this particular error.
Ignore All	Ignore this error every time it appears in this message.
Add to Dictionary	Add the current word to the dictionary so it is never identified as incorrect again.
Change	Change this word to the word selected in the Suggestions box or to what you have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

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

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

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

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



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

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

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

And similar global options:

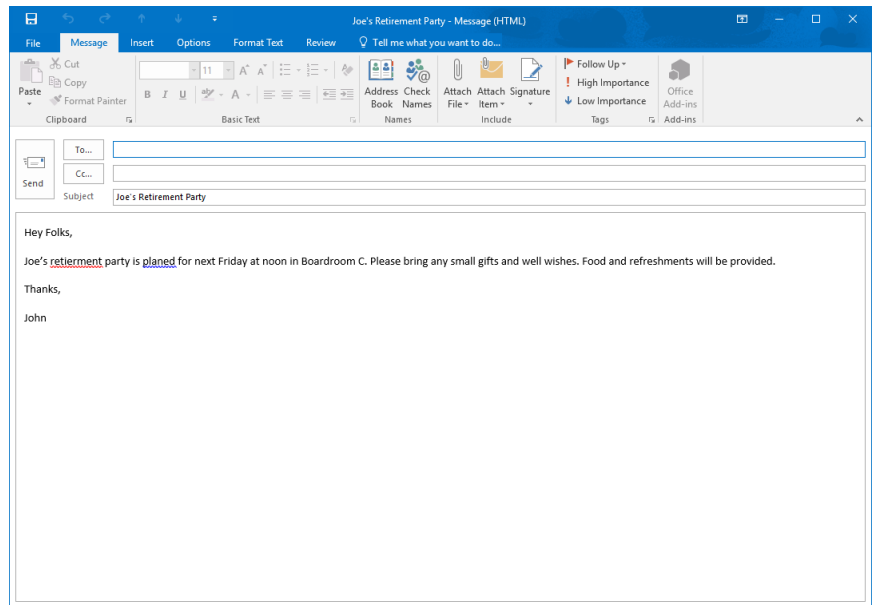
Check Grammar	Toggle grammar check on or off.
Options	Change spelling and grammar options.
Undo	Reverse the last change made.
Cancel	Cancel the spelling and grammar check.

ACTIVITY 2-2

Checking Spelling and Grammar

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

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



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

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

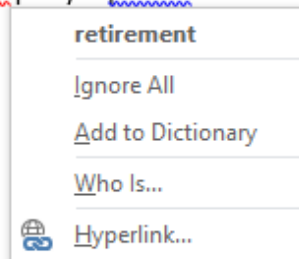
- Remember that a red underline indicates a spelling error, while a blue underline is used to identify a grammatical or contextual spelling error. Right-click the spelling error:

Hey Folks,

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

Thanks,

John



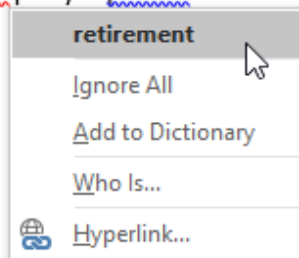
- Click the "retirement" correction:

Hey Folks,

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

Thanks,

John



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

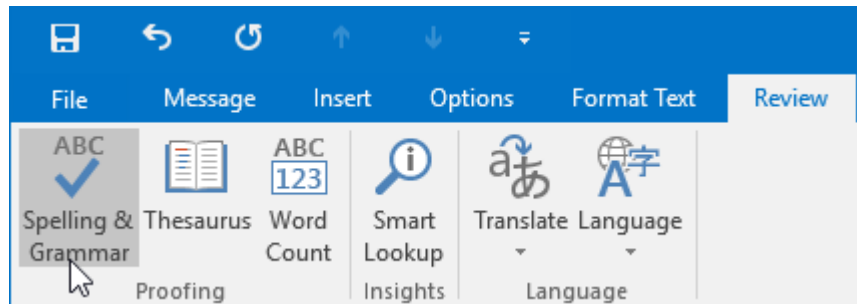
Hey Folks,

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

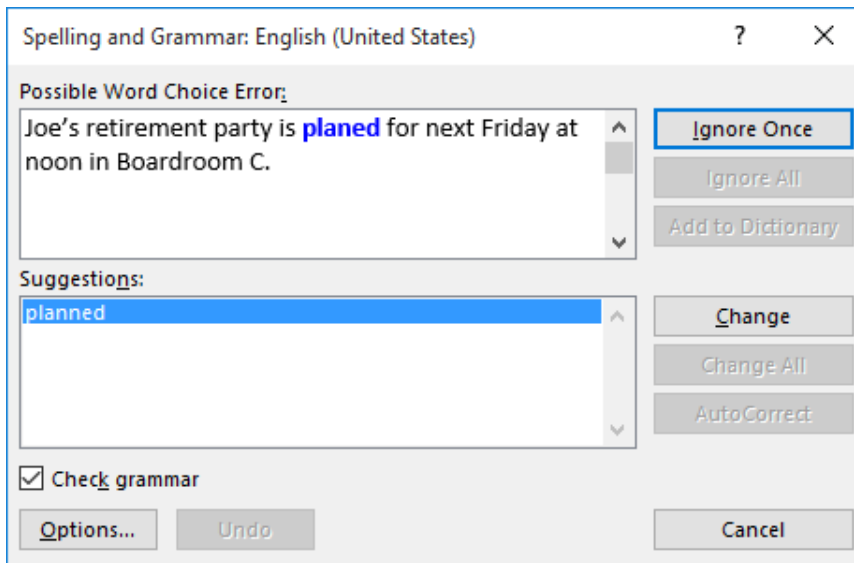
Thanks,

John

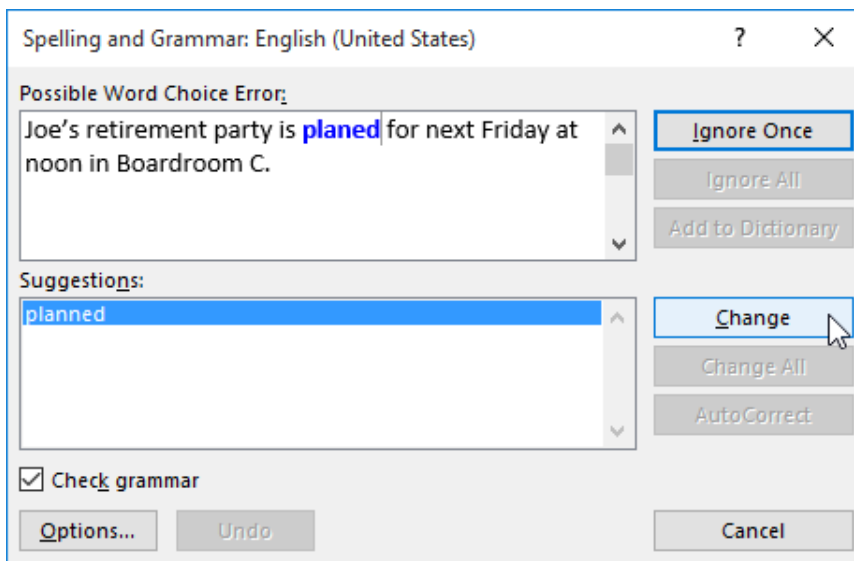
6. If you are working with a longer message, sometimes it can be quicker to use the spelling and grammar checker rather than manually correcting each error. Click Review → Spelling & Grammar to start the spell check:



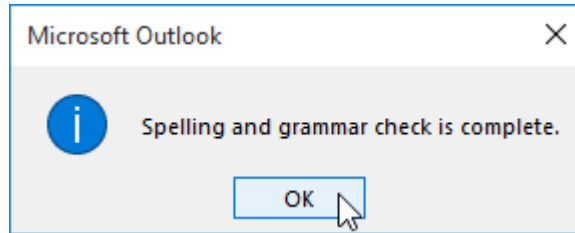
7. With the Spelling and Grammar dialog box now displayed, you will see the remaining error in the current message:



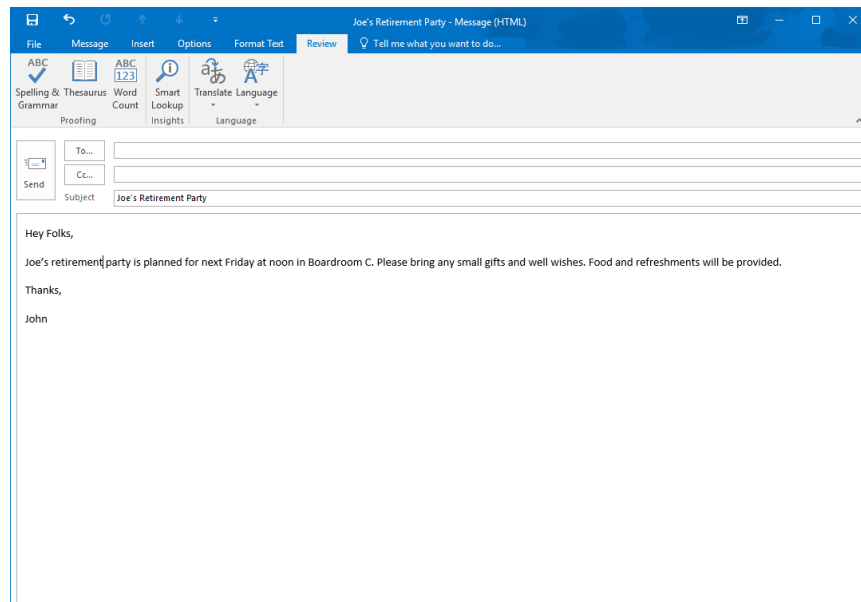
8. In this case the error that was identified is a contextual spelling error with only one suggested correction. Ensure that this suggestion is selected and click the Change button:



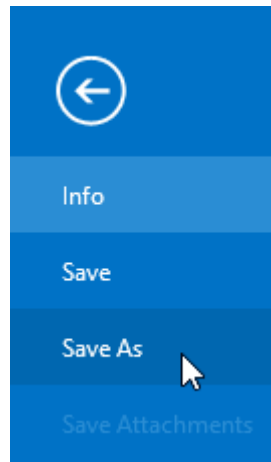
9. The correction will have been made and the Spelling and Grammar dialog box will close. A smaller dialog box will be displayed that lets you know the spelling and grammar check is complete. Click OK:



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



11. Click File → Save As:



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

TOPIC C: Format

Message Content

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

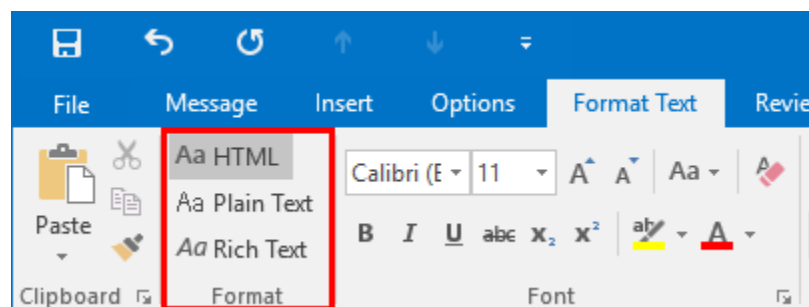
Topic Objectives

In this topic, you will learn:

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

MESSAGE FORMATS

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



The current mail format will be shaded in, as well as indicated directly in the title bar. By default, messages will use the HTML format. Although

this format offers the most formatting features, there may be times when you want to use plain text or rich text format.

If you use the **Plain Text Format**, you will still have message options and the ability to attach files. You'll also have some Word-specific options like spelling and grammar check. However, all formatting options (including font style, size, and color; bullets and numbering; themes; and graphics and tables) are disabled. The primary purpose behind this format is that you can guarantee that everyone you send this type of e-mail to will be able to read it, no matter which e-mail client that they use.

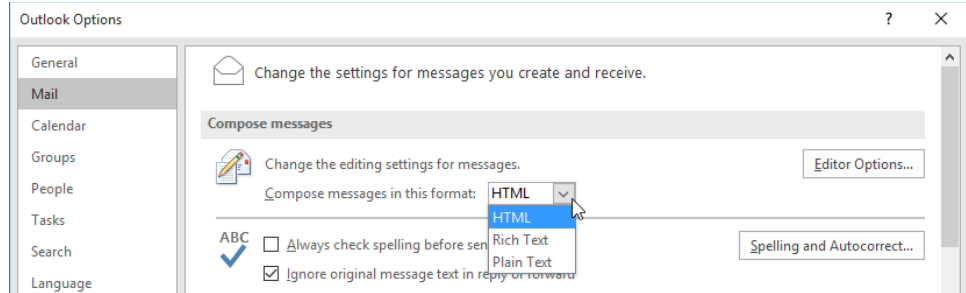
Rich Text Format (RTF), on the other hand, is a richer way to write text messages. All of the formatting options are available, including stationery, themes, font styles, bullets and numbering, and graphics. What makes this format unique is that pictures are embedded in rich text messages rather than attached. While this format is useful, the primary difference between it and other formats is how it is encoded. This encoding is a proprietary Microsoft format, so people who don't use Outlook may not be able to read your e-mail.

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

Changing the Format for All New Messages

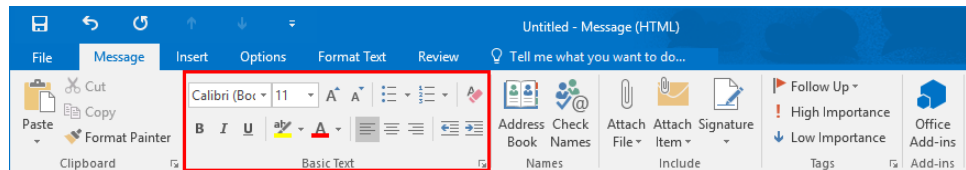
If you have a preference for a specific message format, you can change the format for all new messages so that when you create a new message it is already in the format that you prefer.

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

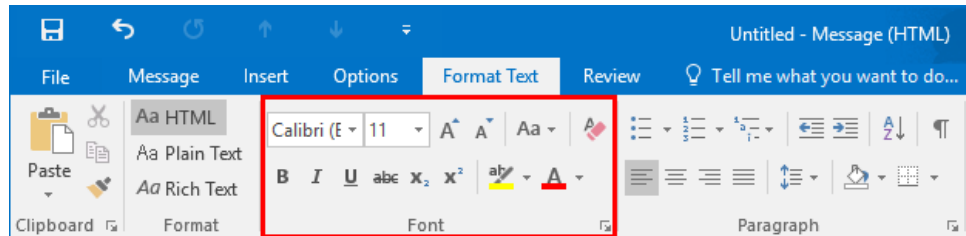


FONT OPTIONS

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

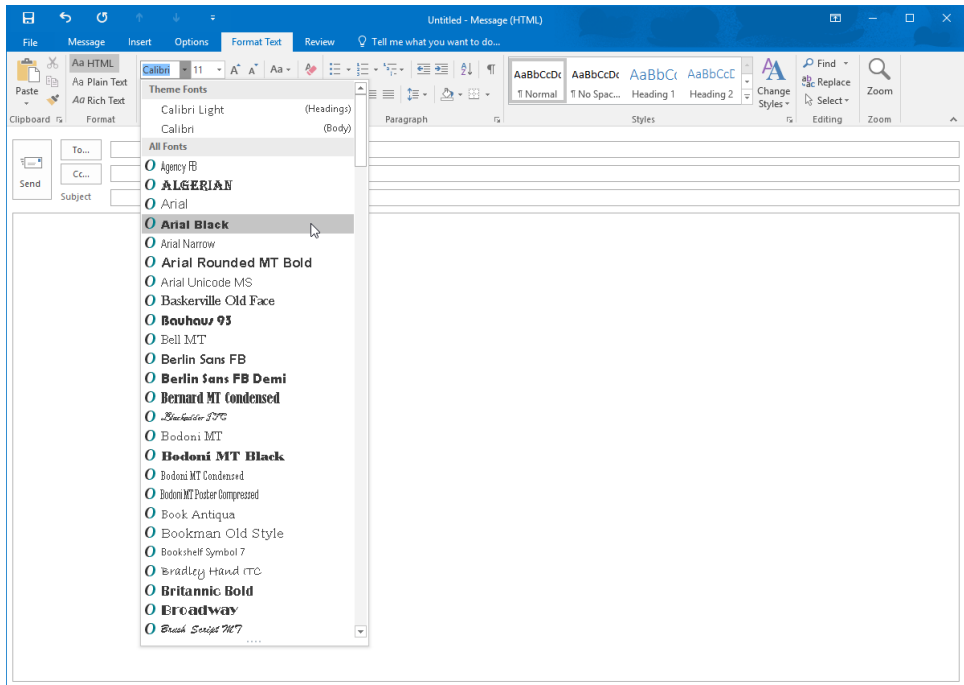


These commands can also be found in the Font group of the Format Text tab:



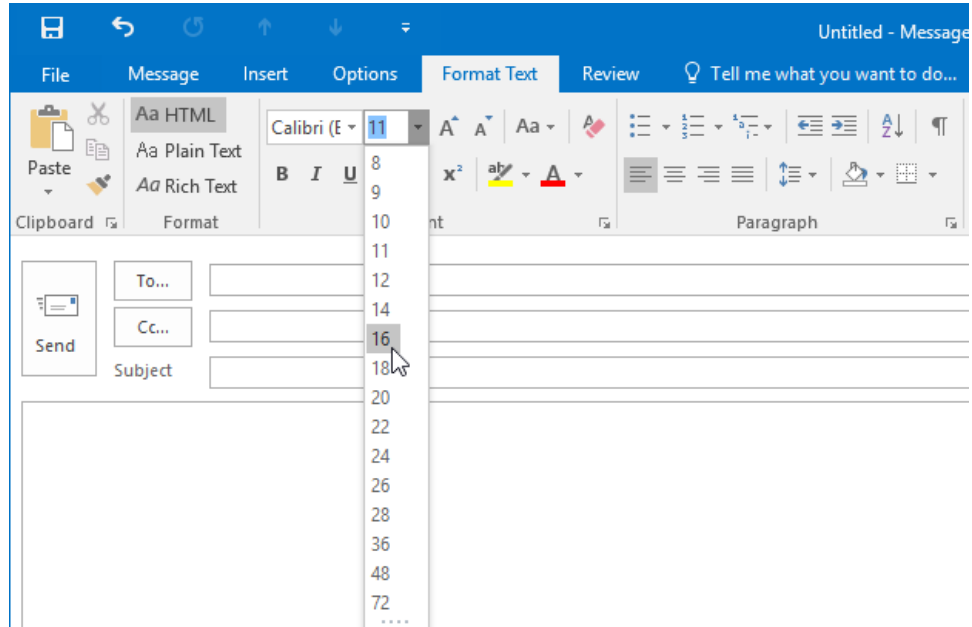
(The most popular commands are also included on the mini toolbar.)

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

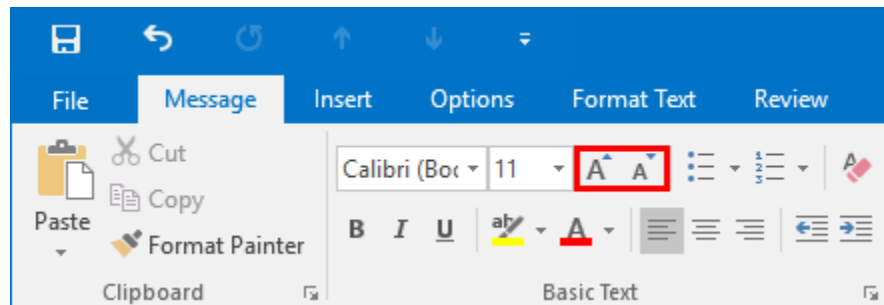


Note that theme fonts are listed at the top of the menu. Choosing these fonts will help keep your message consistent. Outlook also stores recently used fonts near the top of the menu.

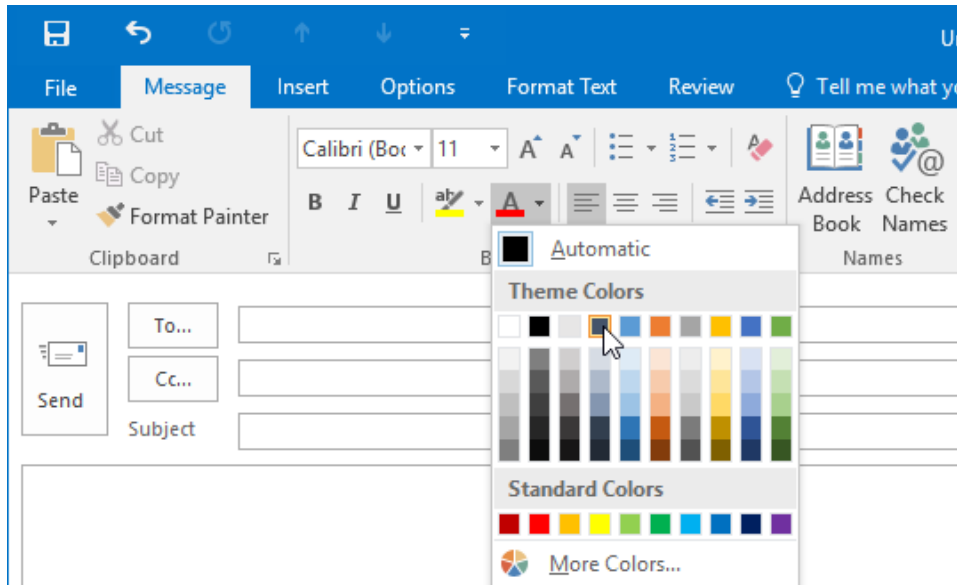
You can change your font size the same way: select a size from the **Font Size drop-down menu** on the Message or Format Text tabs, or the mini toolbar. (You can also type a value in the Font Size box.) If you choose to use the menu, you will see a preview as you scroll through the sizes:



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



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



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

Applying Text Effects

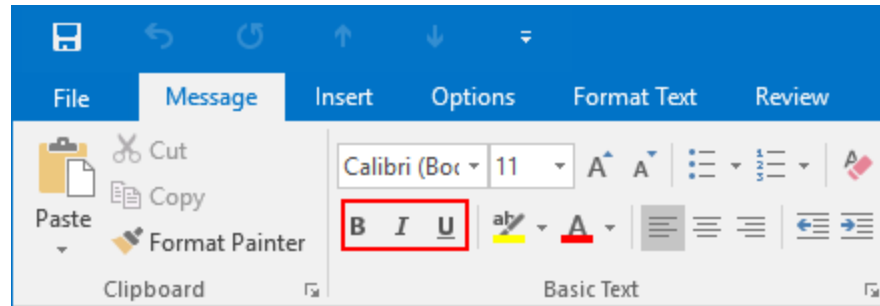
The next part of working with text is applying formatting. The basic formatting types are:

Bold makes text darker.

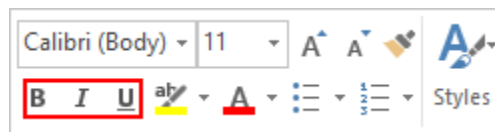
Italics slant text to the right.

Underline puts a line under text.

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



As well as the mini toolbar:



You can also use the following keyboard shortcuts:

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

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

You can also combine effects by turning multiple effects on:

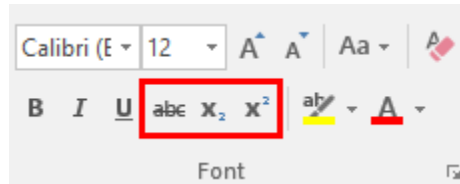
Bold and underline

Bold italics

Italics and underline

Bold, italics, and underline

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



Here is what they look like:

~~Strikethrough~~ places a line through text.

_{Subscript} makes text smaller and places it below surrounding text.

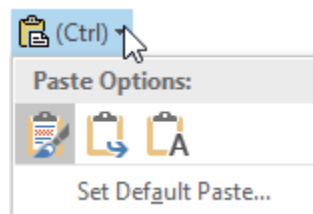
^{Superscript} makes text smaller and places it above surrounding text.

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

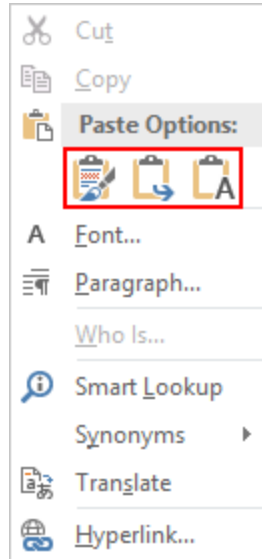
PASTE OPTIONS

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

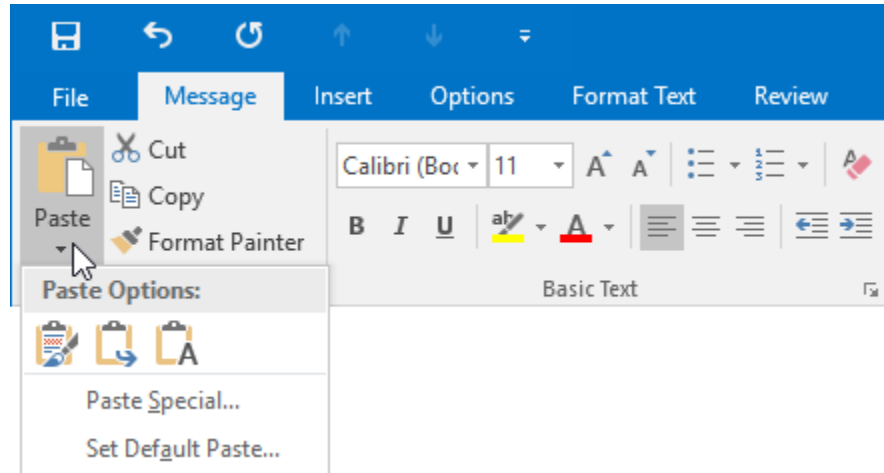
Once you have pasted text, you will see a paste icon. If you press Ctrl or click the icon, you will see the following options:



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



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



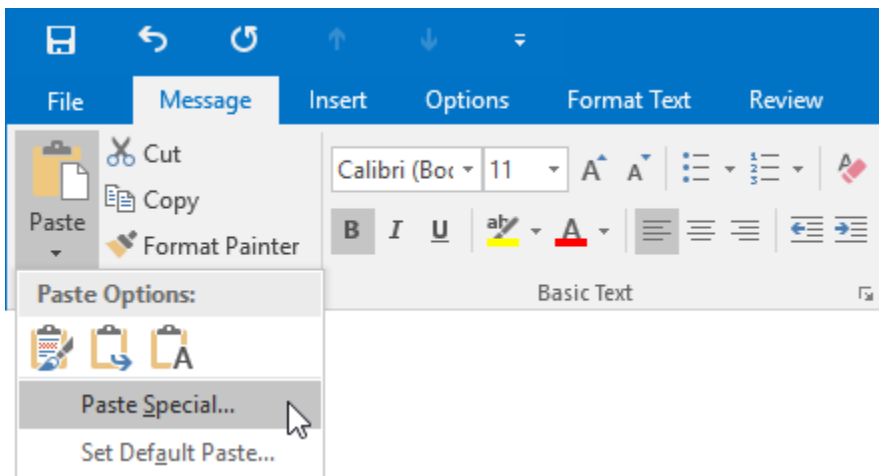
No matter which method you use to choose a paste option, the commands will be the same:

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

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

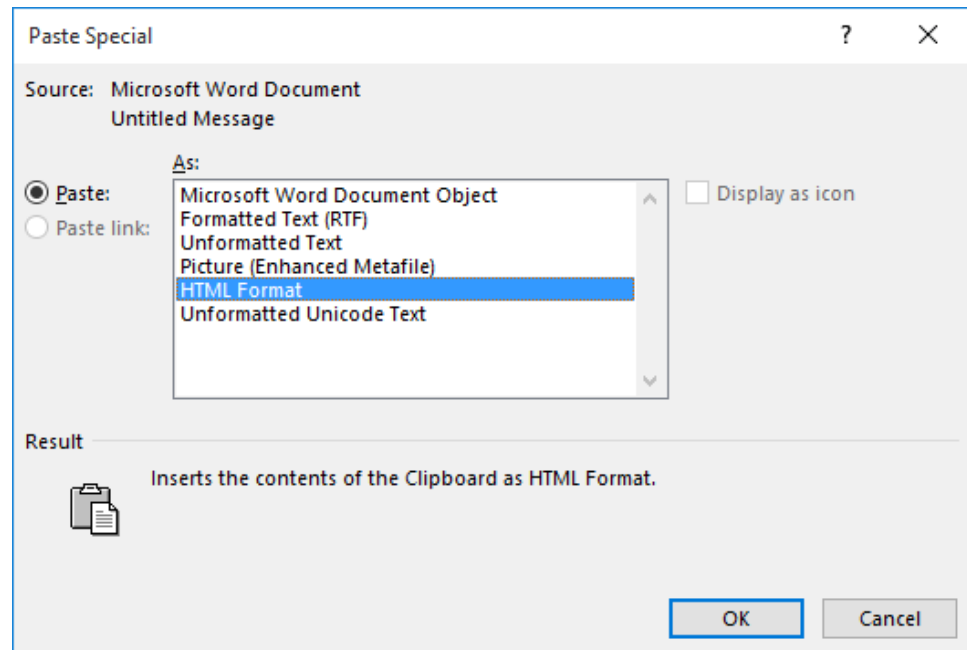
PASTE SPECIAL

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



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

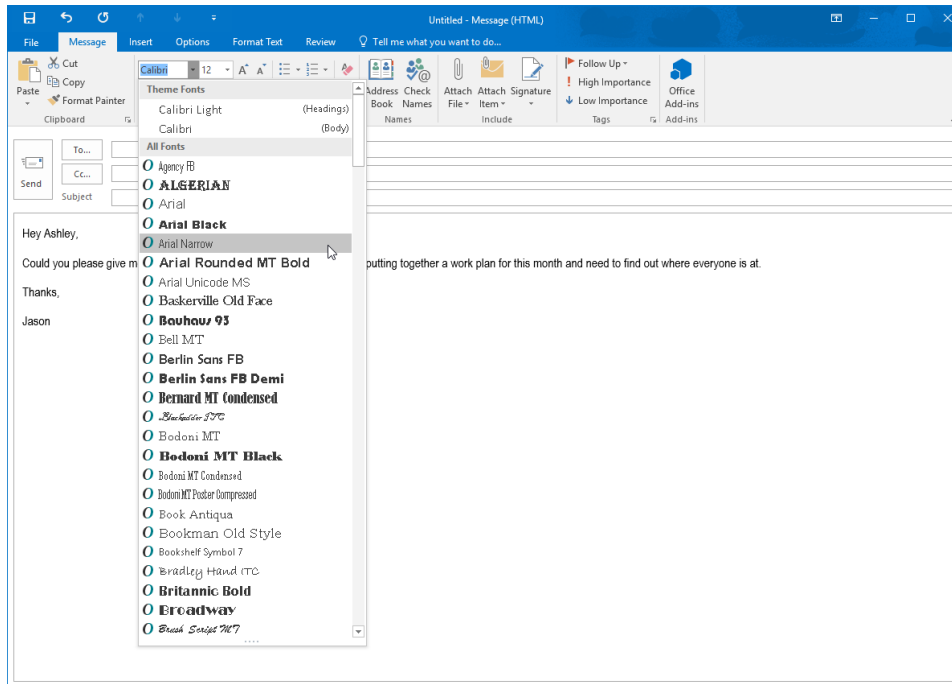
This action will open the Paste Special dialog box:



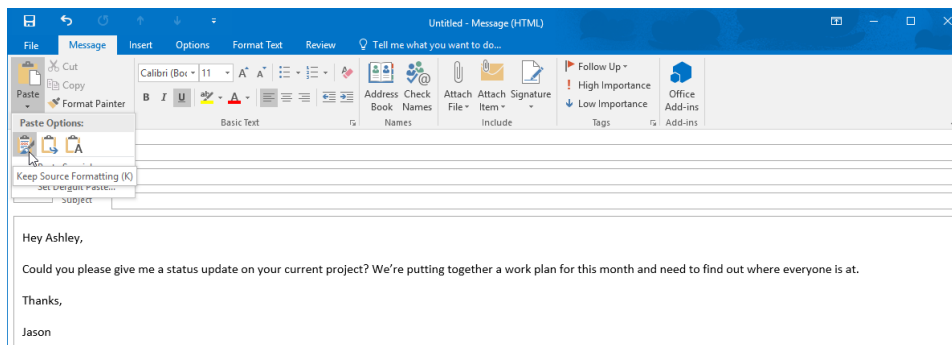
In this dialog box you are able to see where the content was copied from, as well as choose from a variety of different format options. (The formats listed here will depend on the type of content that has been copied. For example, if you copied an image the options will be different than if you copied text.) Once you have chosen a format, click the OK button to paste the copied item into your message using the chosen format.

LIVE PREVIEW

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

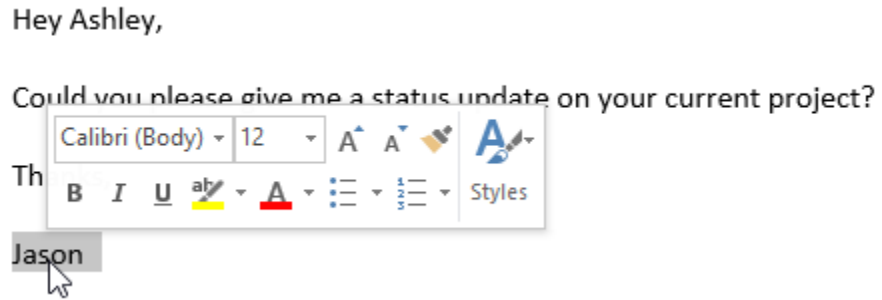


You can also use this feature when trying to choose between the three paste options. Simply move your cursor over a paste option and you will see a preview of how it will look once applied:



THE MINI TOOLBAR

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



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

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

	Change the font type and size.
	Use these buttons to nudge font size up or down.
	Click to toggle the Format Painter. This lets you copy formatting from the selected text and paint it onto other text.
	Apply bold, italic, and/or underline effects.
	Highlight text. Click the pull-down arrow for additional colors.
	Change font color. Click the pull-down arrow for additional colors.
	Create a bulleted or numbered list.
	View the Styles gallery to apply a style to text.

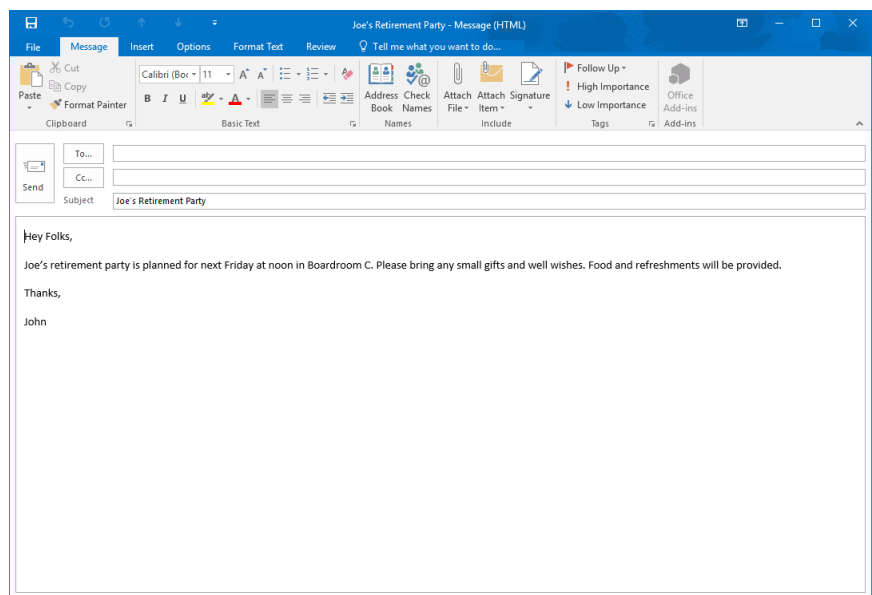
The mini toolbar will go back to being hidden when you move your cursor off of the selected text or click elsewhere on your screen.

ACTIVITY 2-3

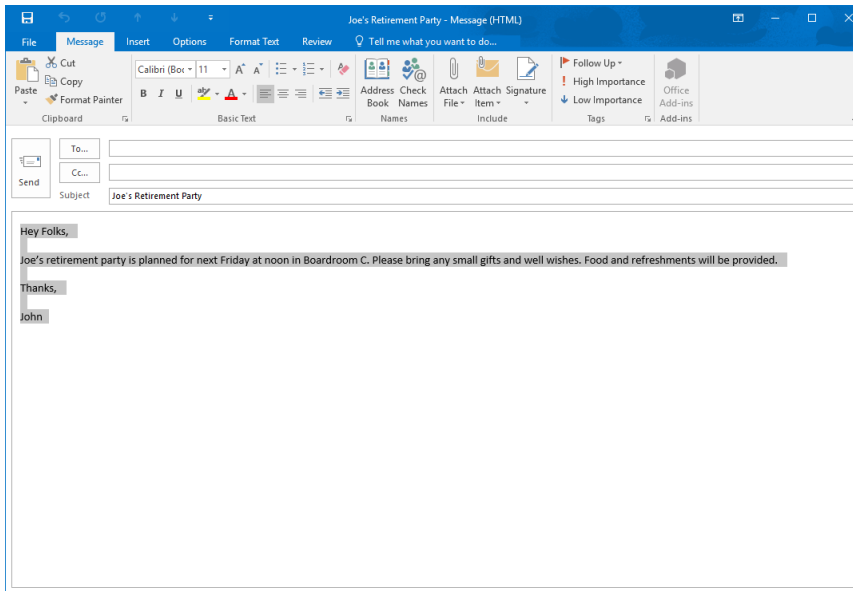
Formatting Message Content

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

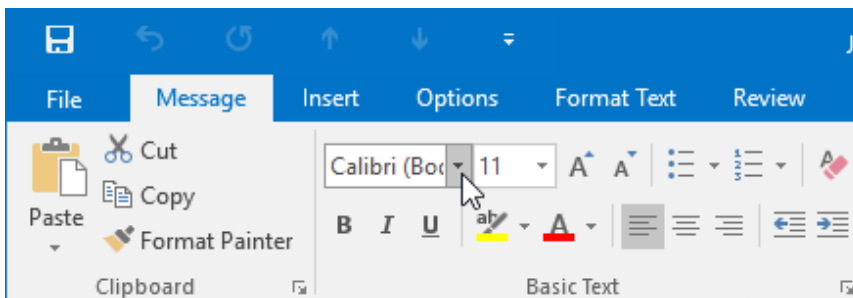
1. To begin, open Outlook 2016. Within your Exercise Files folder, double-click the Activity 2-3.msg file to open it. This message will be displayed in a separate Outlook window:



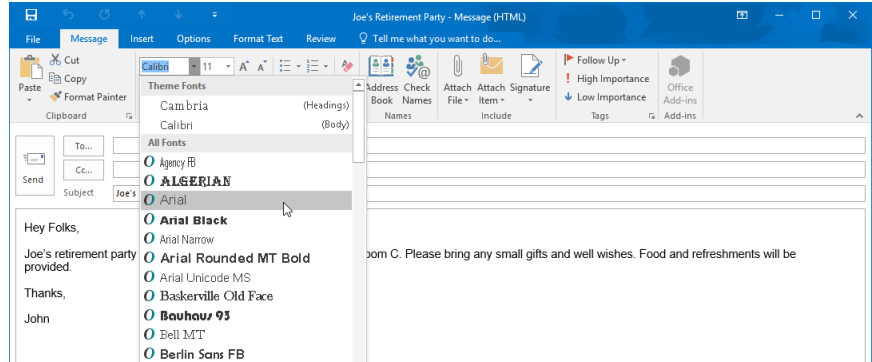
2. Click inside the body of this message and press Ctrl + A on your keyboard to select the entire message:



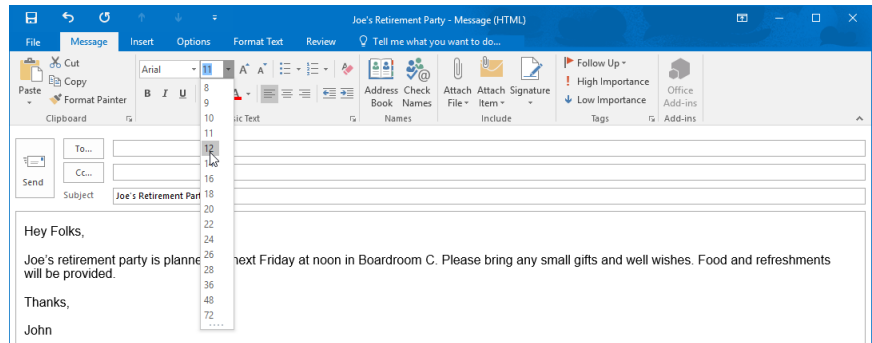
3. Click Message → Font:



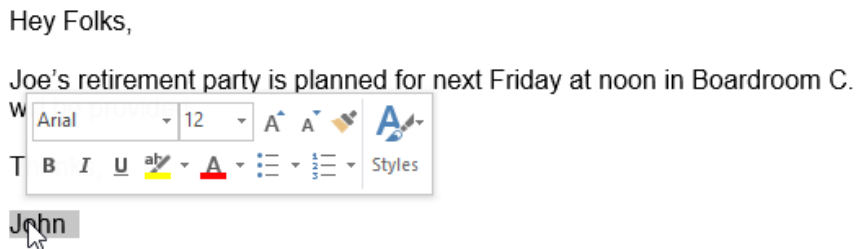
4. The Font drop-down menu will open. Move your cursor over some of the available options. You will see a preview of each selection. Click Arial when you are ready:



5. Next, click Message → Font Size → 12:



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



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

Hey Folks,

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

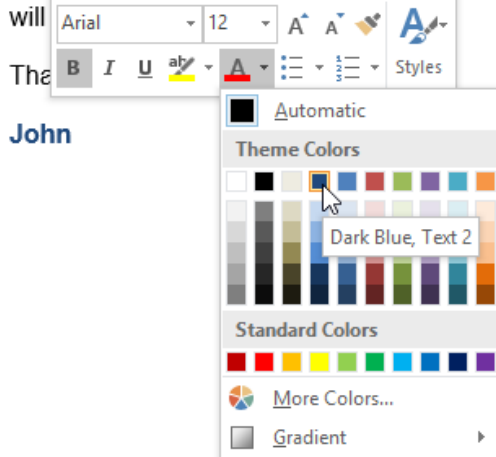


John

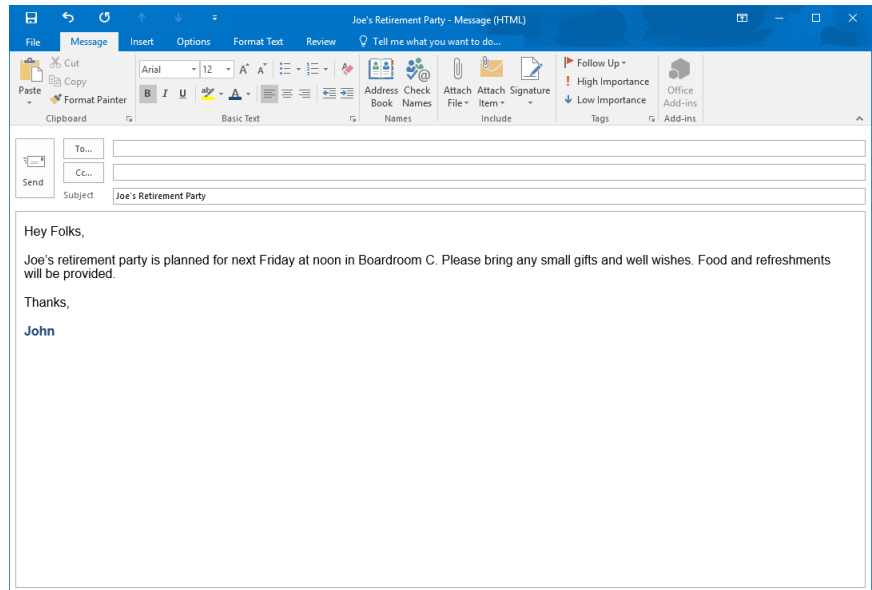
8. The selected text will now have the bold text effect applied to it. Still in the mini toolbar, click the Font Color drop-down menu and click "Dark Blue, Text 2:"

Hey Folks,

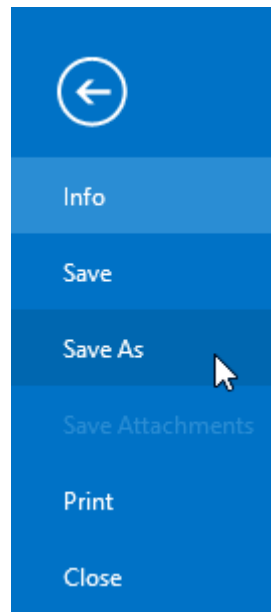
Joe's retirement party is planned for next Friday at noon in Boardroom C.



9. Your message will now look like this:



10. Click File → Save As:



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

TOPIC D: Attach Files and Items

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

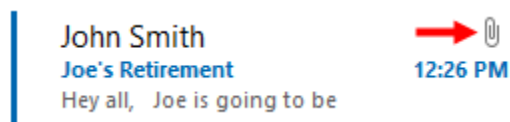
Topic Objectives

In this topic, you will learn:

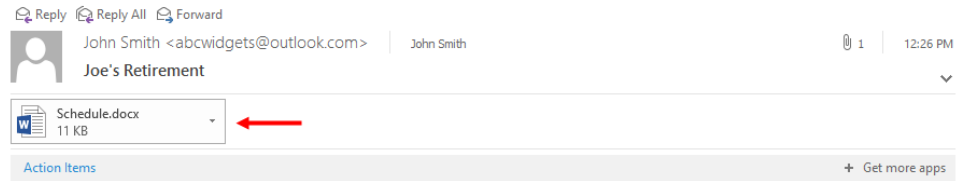
- About attachments
- How to save and create attachments
- How to send Outlook items as attachments
- About the attachment reminder

ATTACHMENTS

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



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



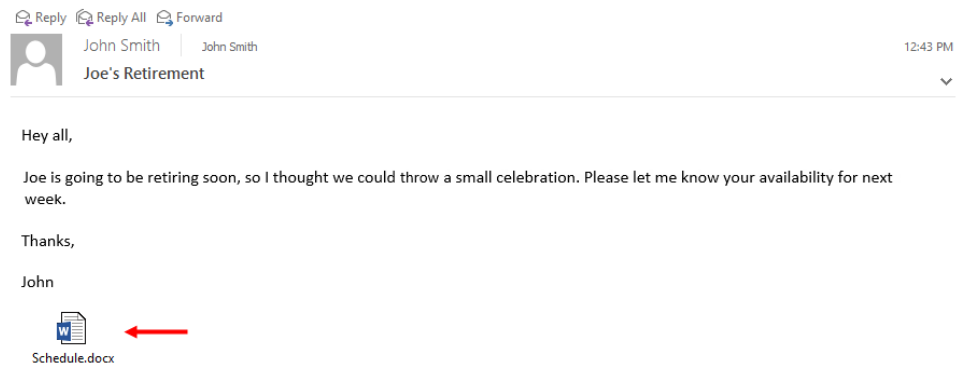
Hey all,

Joe is going to be retiring soon, so I thought we could throw a small celebration. Please let me know your availability for next week.

Thanks,

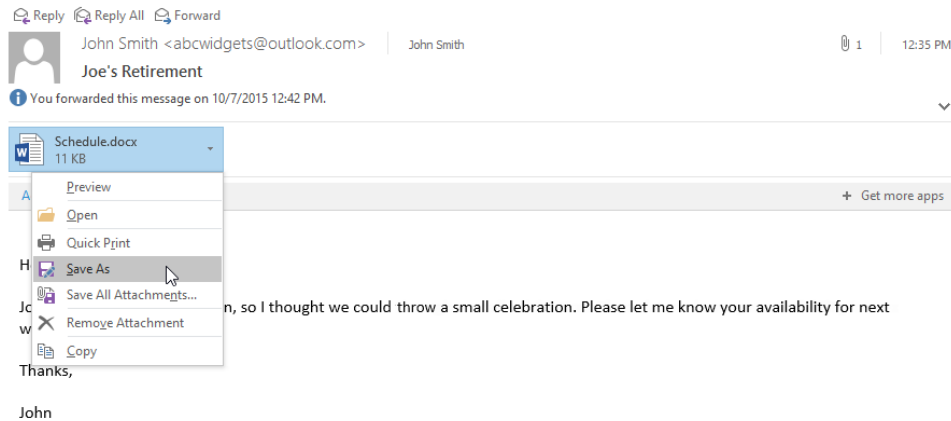
John

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

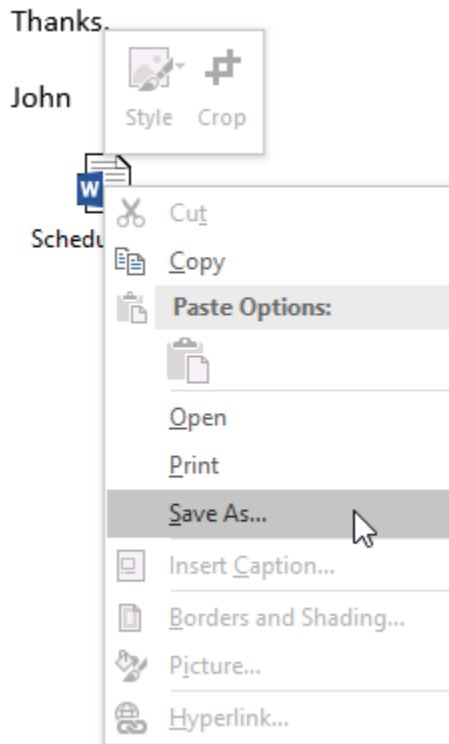


SAVING ATTACHMENTS

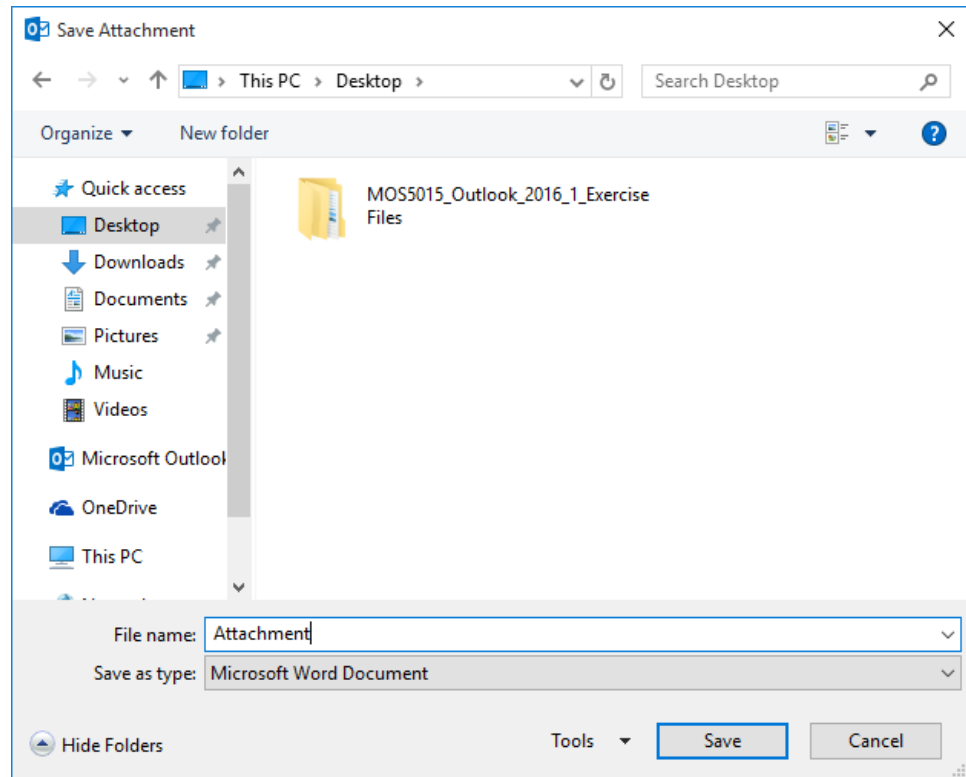
To save the attachment in a message that you received, open the message and click the drop-down arrow in the listing for the attachment in question. From the list of options that are provided, click Save As:



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

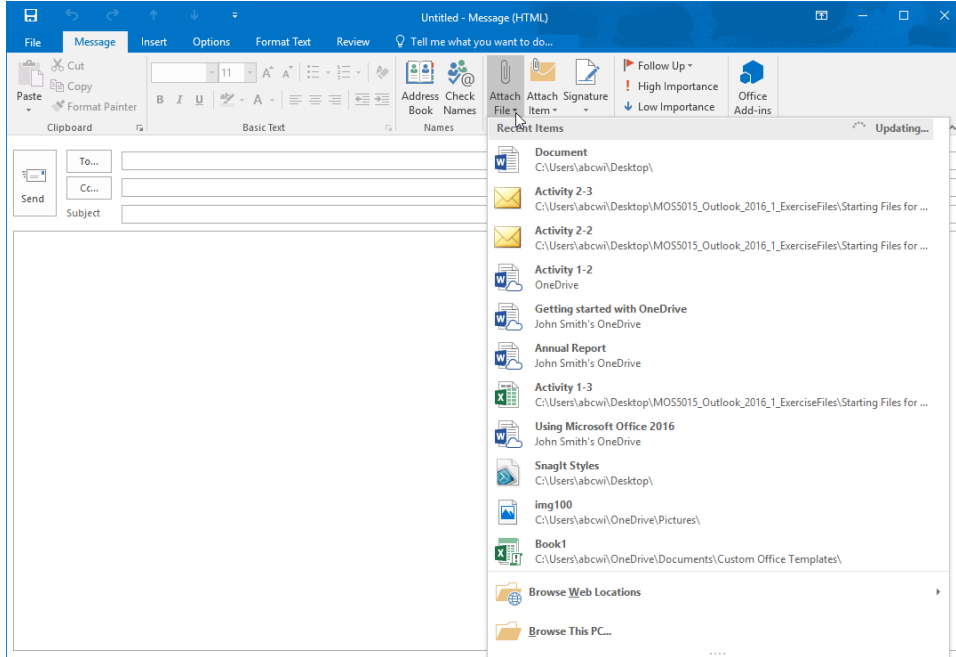


In either case, you will be prompted to choose a name and location for the file using the Save Attachment dialog box:

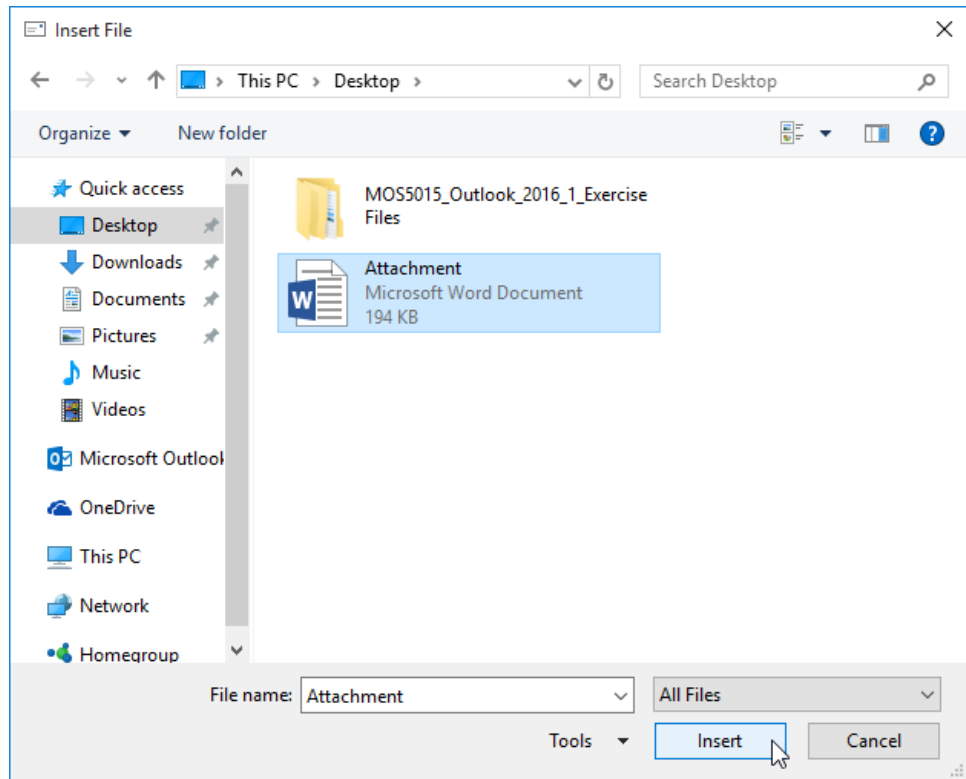


CREATING ATTACHMENTS

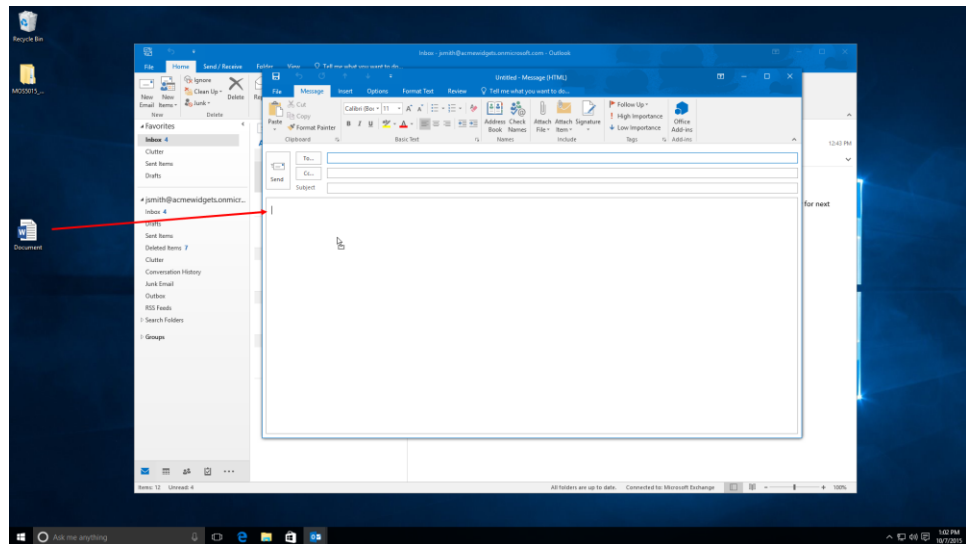
To attach a file to a message, click Message → Attach File. This drop-down menu will list all of the recent files that you have interacted with. If you see the item that you would like to attach listed here, click to add it. If not, you can choose to browse the files on your PC or web locations, such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



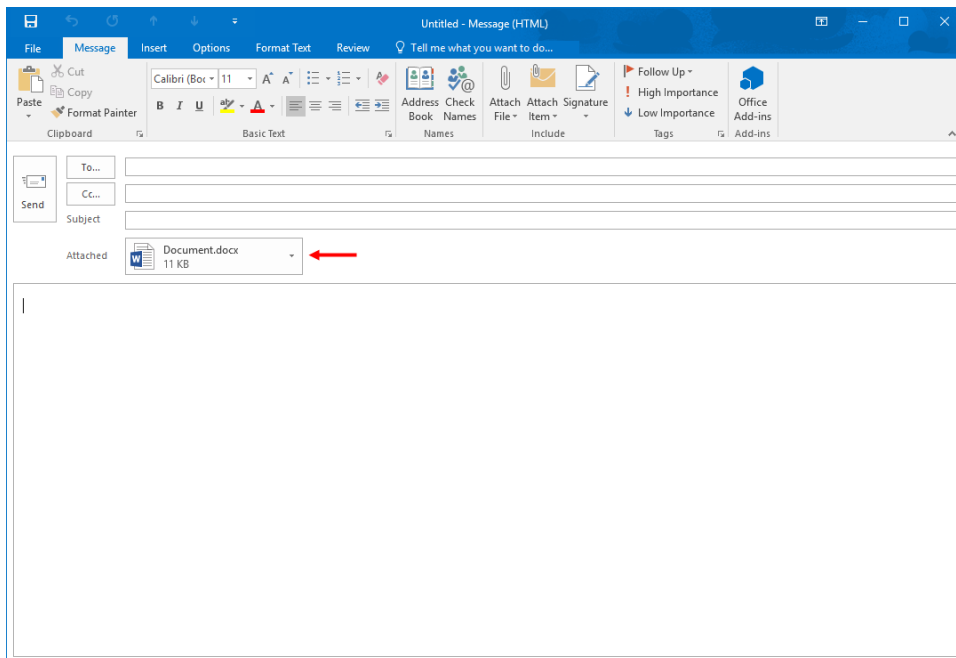
If you choose Browse This PC, the subsequent dialog box will then allow you to find and select that file:



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

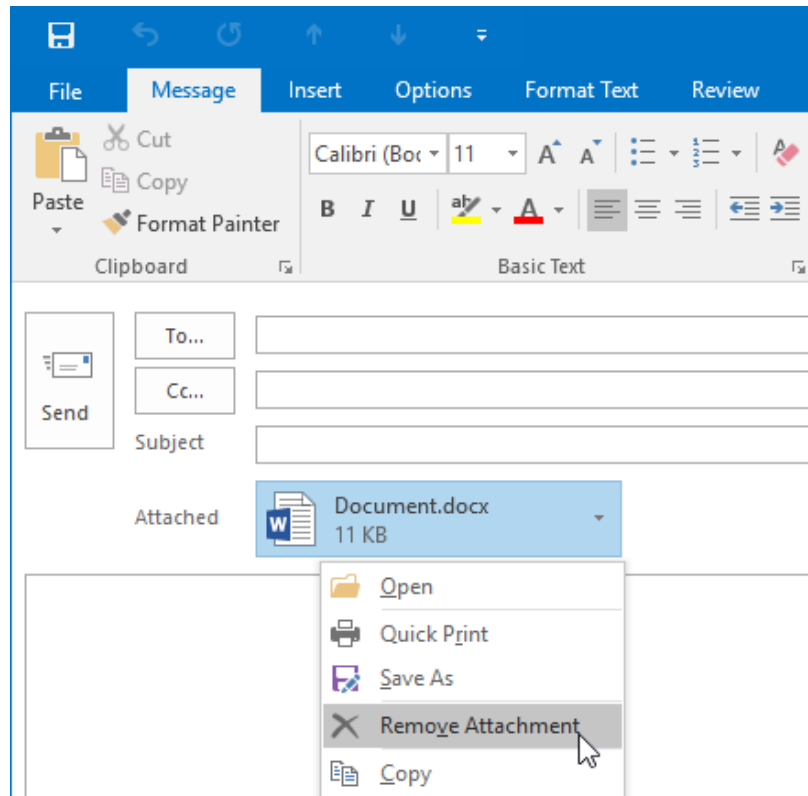


No matter the method that you use, the attachment will be listed near the top of your message:



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

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



File Type and Size for Attachments

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

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

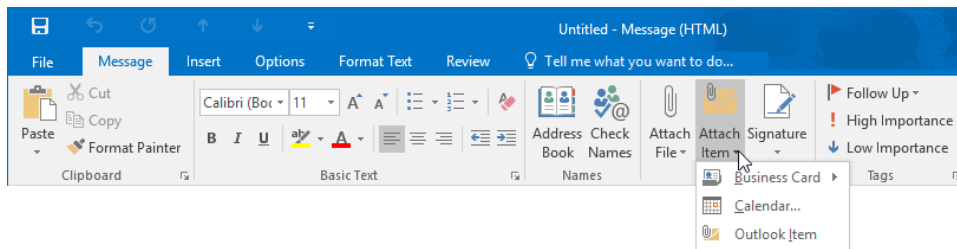
File size is also an equally important aspect to consider because larger files are more difficult to send as an attachment through e-mail. In fact, if an attachment is too large, the message may not be received by the sender at all.

OUTLOOK ITEMS AS ATTACHMENTS

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

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

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

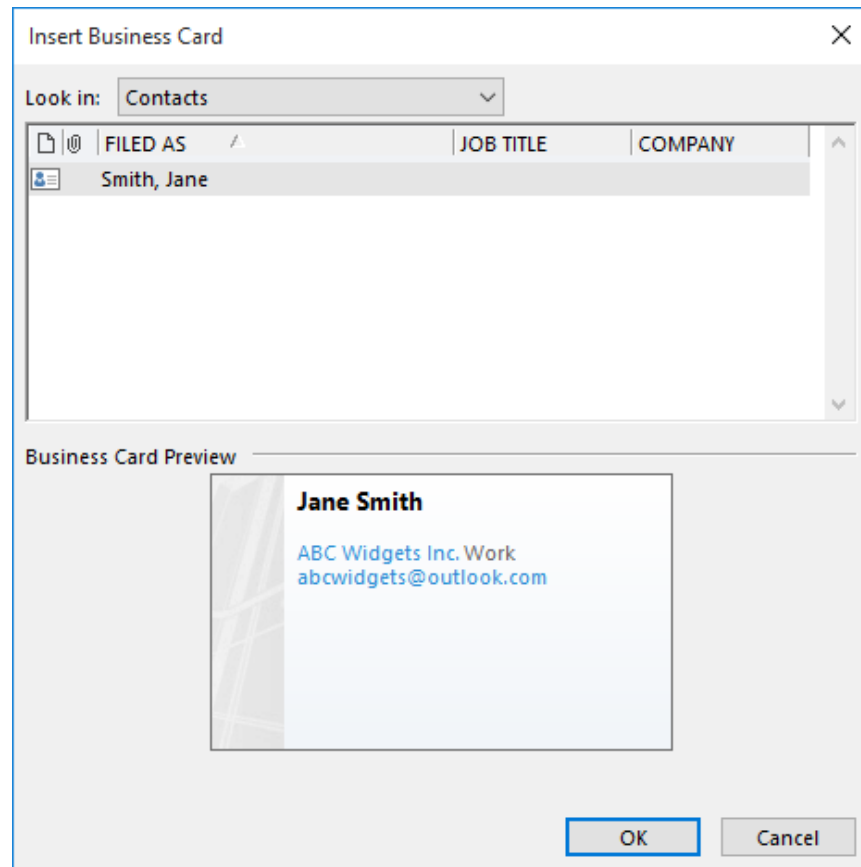


This drop-down menu lists three types of items that you can attach.

Business Card

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

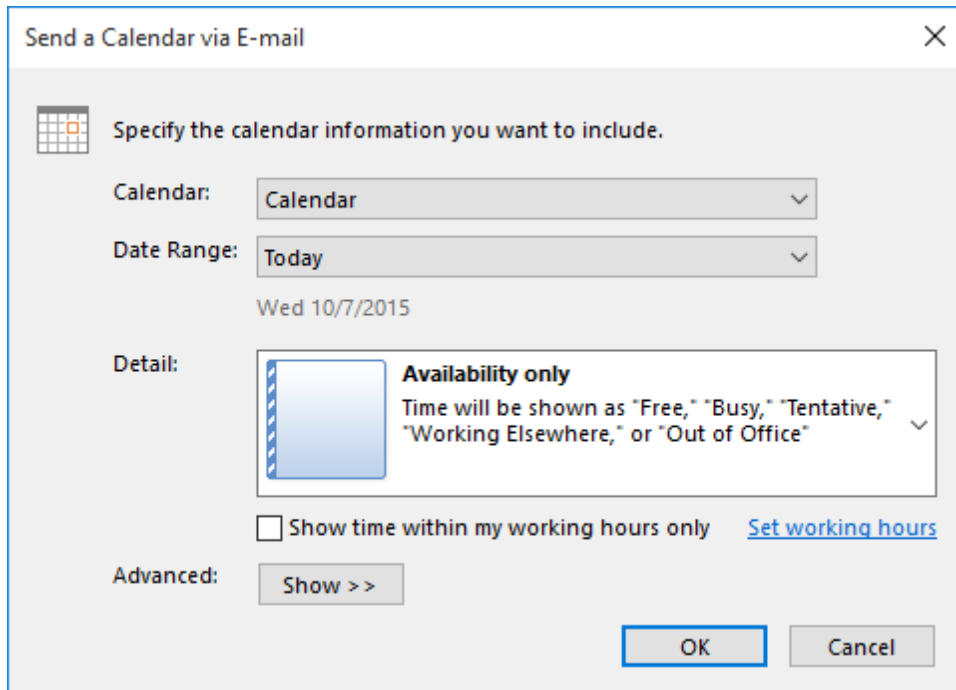
This will open the Insert Business Card dialog box. Using its controls, you are able to find, view, and insert the business card that you want to add as an attachment to the current message:



Calendar

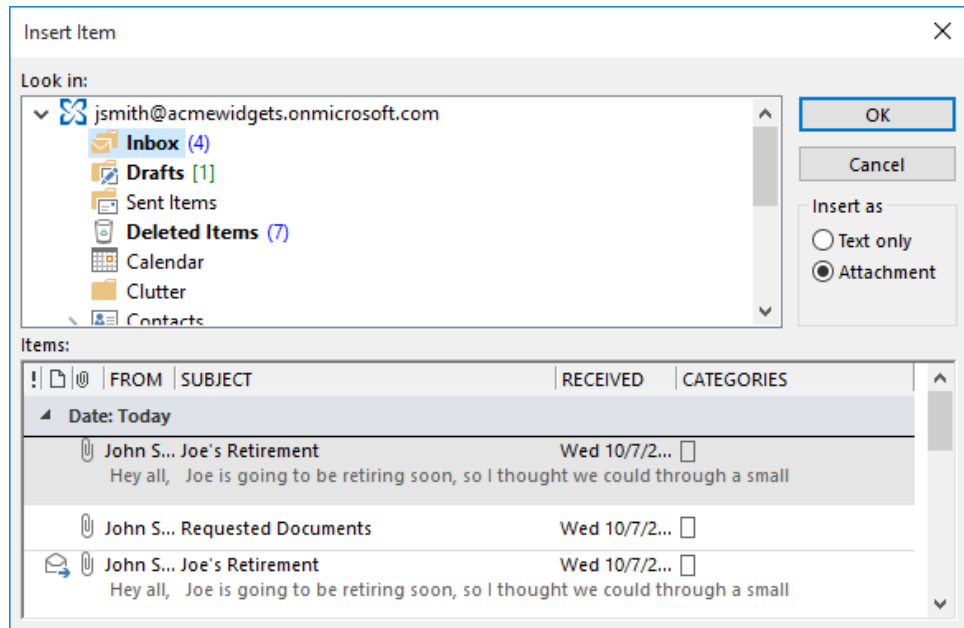
If you are collaborating with another person or group and need to choose a date and time for a meeting, sharing a link to your calendar can save a lot of time. This allows recipients of the link to view your calendar and see when you have free time as well as when you are busy.

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



Outlook Item

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

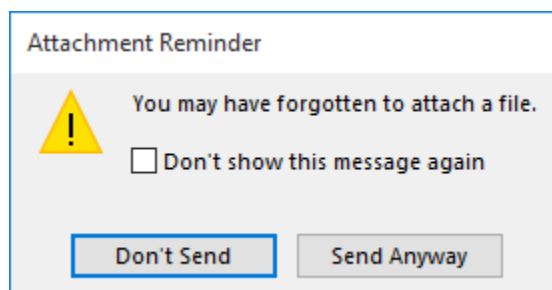


You can then choose to insert the selected item(s) as text only or as an attachment. The recipient of these items will be able to view and work with these attachments.

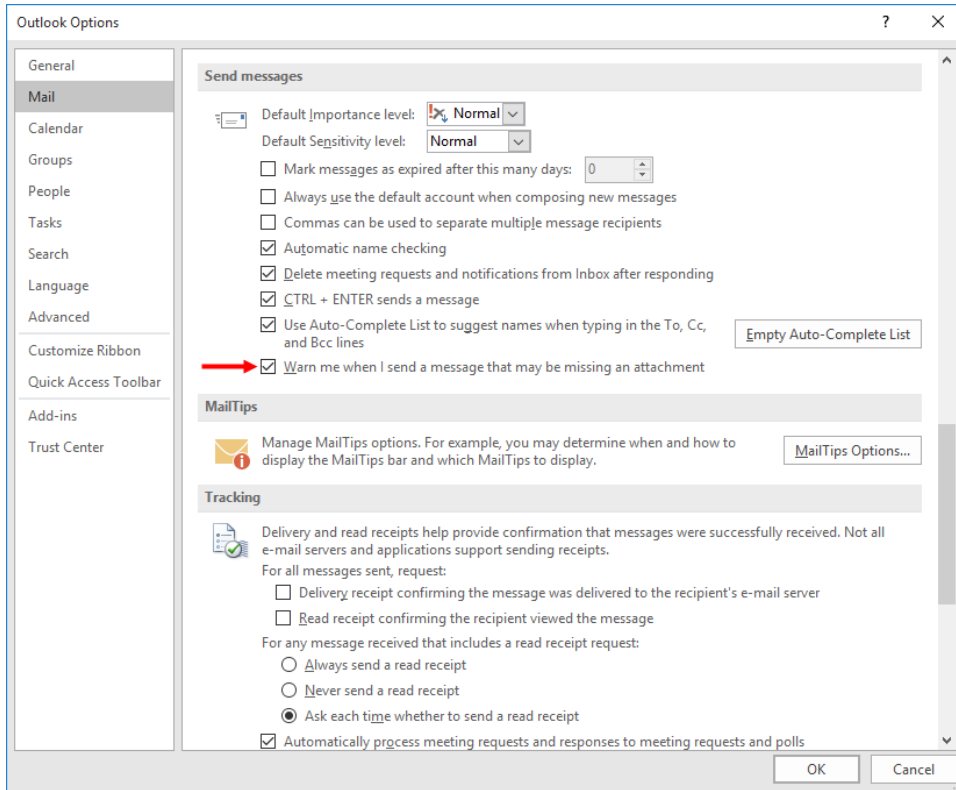
ATTACHMENT REMINDER

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

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



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

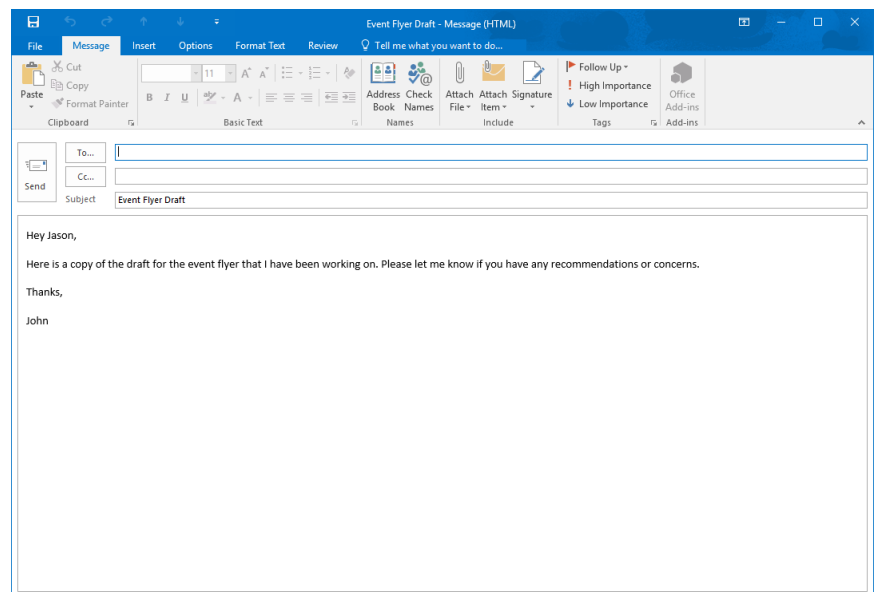


ACTIVITY 2-4

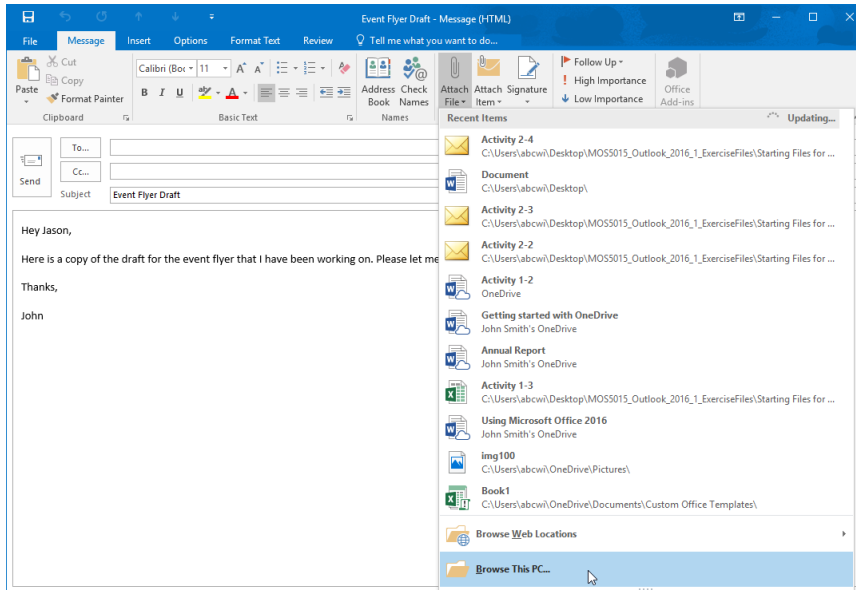
Attaching a File to a Message

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

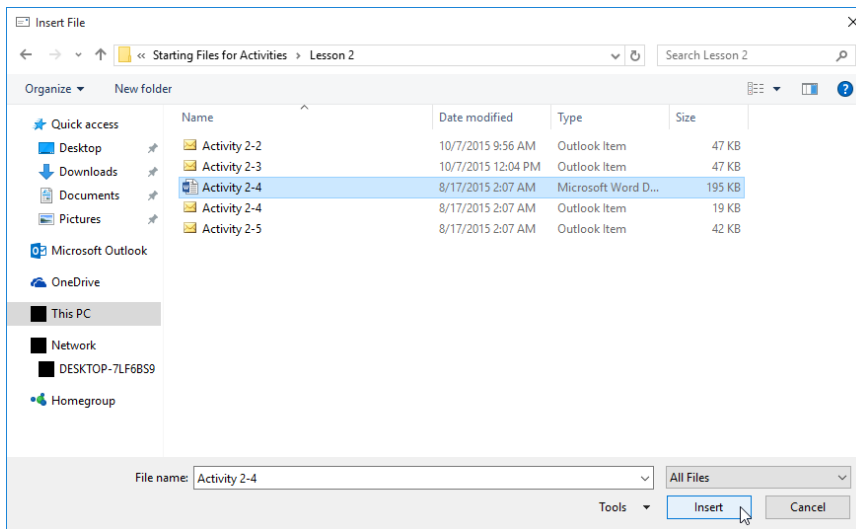
1. To begin, open Outlook 2016. Within your Exercise Files folder, double-click the Activity 2-4.msg file to open it. This message will be displayed in a separate Outlook window:



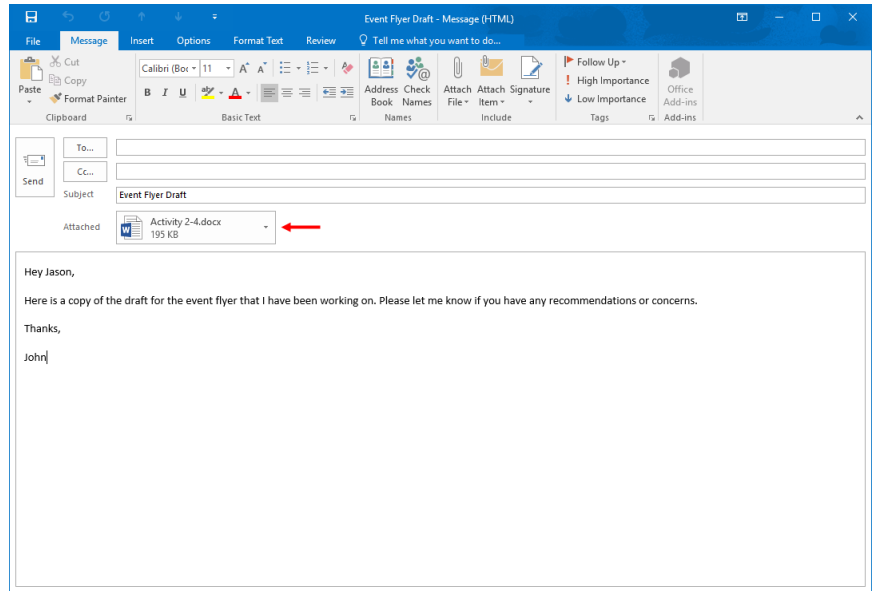
2. Click Message → Attach File → Browse This PC:



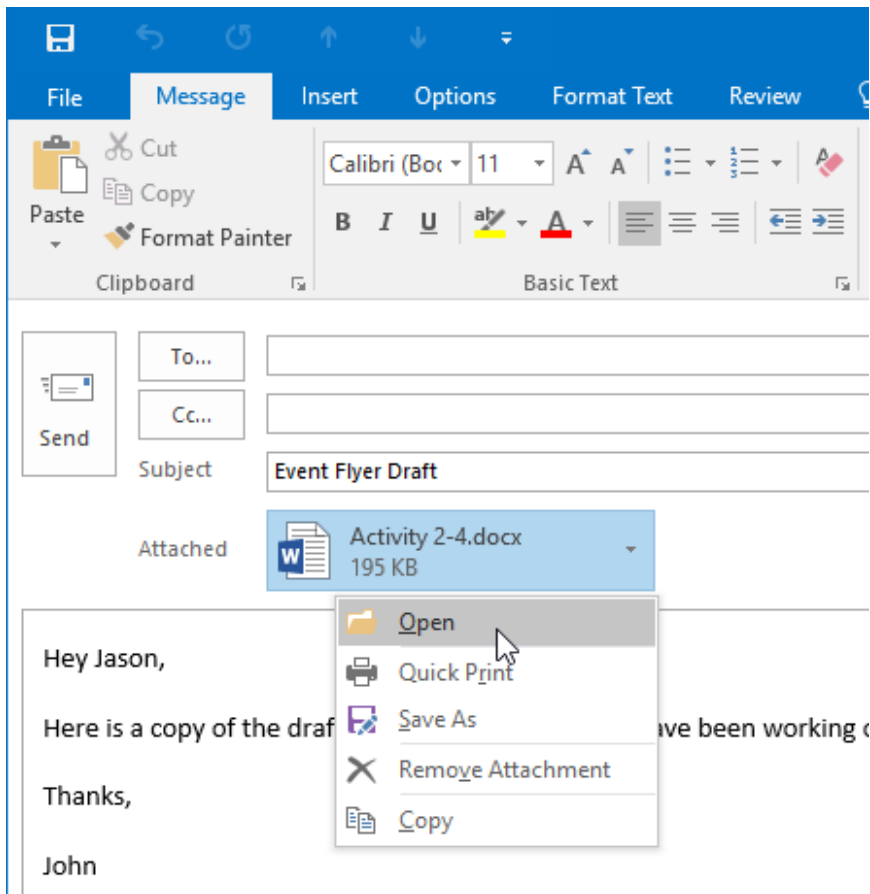
3. The Insert File dialog box will now be displayed. Browse to the Exercise Files folder on your desktop. Find and select the Activity 2-4.docx file. Click Insert:



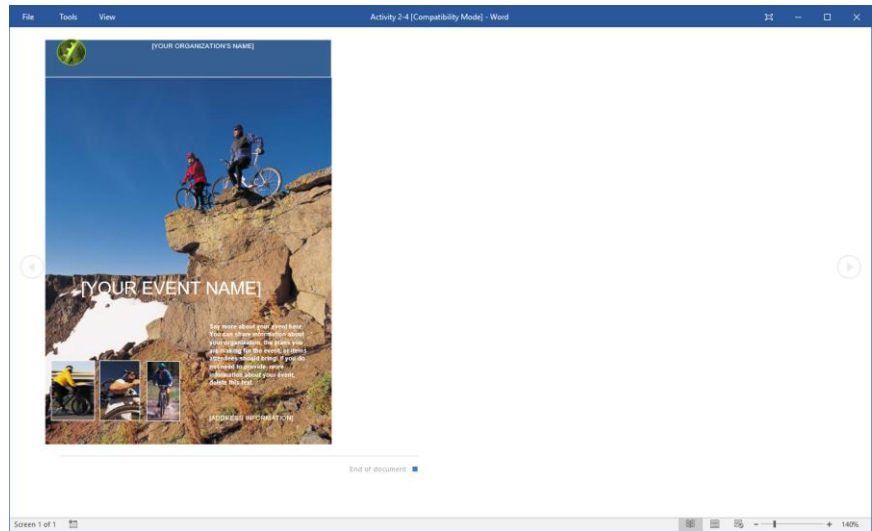
4. The selected file will appear below the Subject field in the message form:



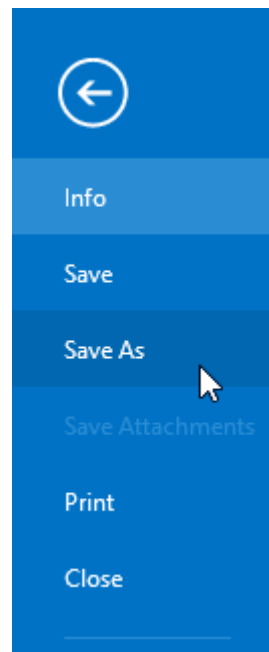
5. To ensure that the file is the correct one, right-click on the attachment and click Open:



- The file will now be displayed in Microsoft Word:



- Close Microsoft Word. Back at the message window, click File → Save As:



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

TOPIC E: Enhance an E-mail Message

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

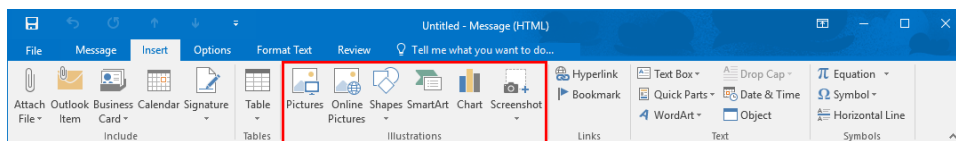
Topic Objectives

In this topic, you will learn:

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

THE ILLUSTRATIONS GROUP

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

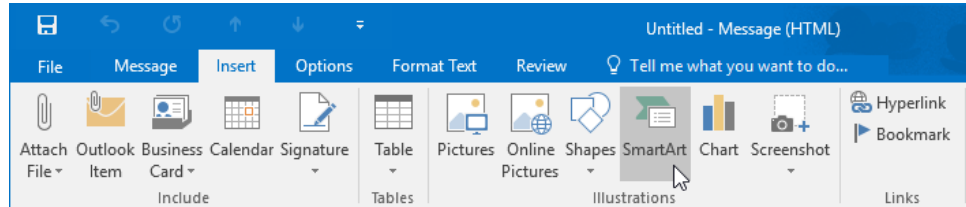


(Note that the commands in this group only become available when your cursor is placed within the body of the message.)

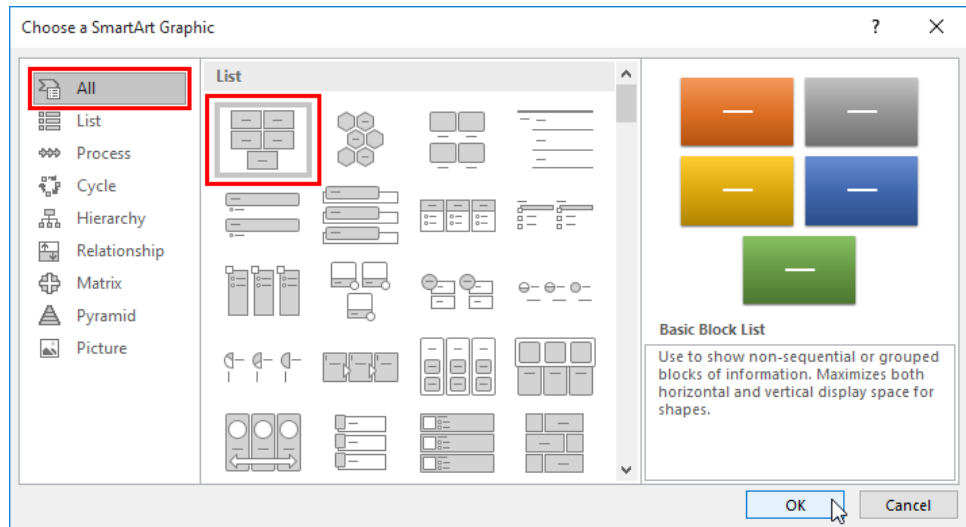
The commands in the group are used to insert different graphical objects into the current message, such as images, shapes, SmartArt, charts, and screenshots.

SMARTART

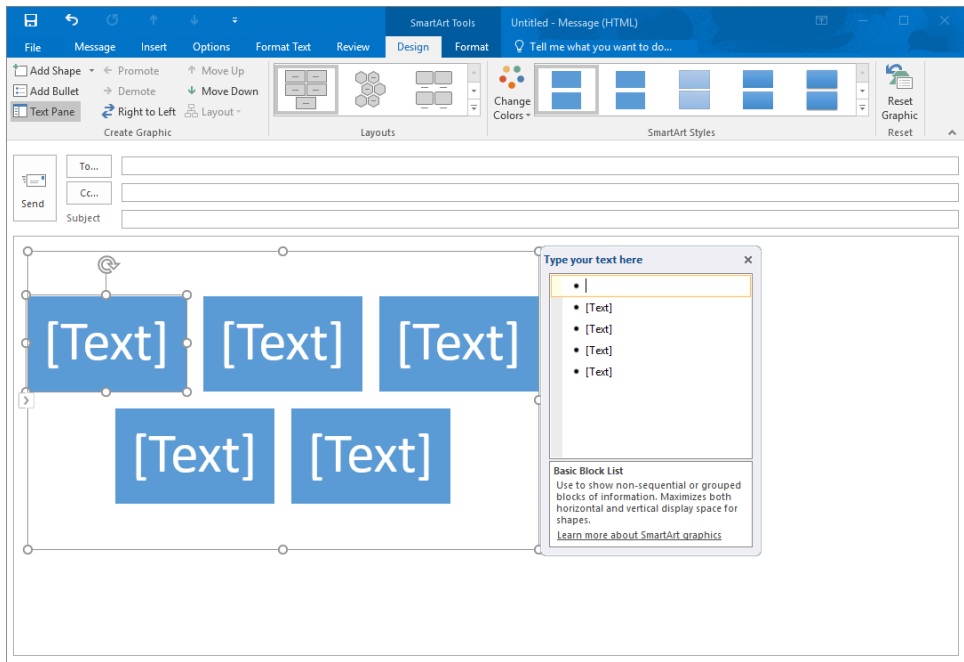
SmartArt allows you to easily add diagrams and other graphical elements directly into the body of an e-mail message. To insert SmartArt into a message, click Insert → SmartArt:



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



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

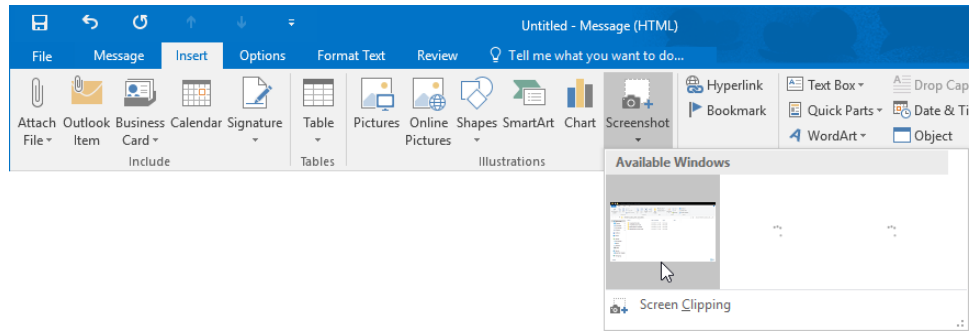


Or, use the Text pane to enter text. With either method, Outlook will automatically adjust the text size so that it will fit in the shape.

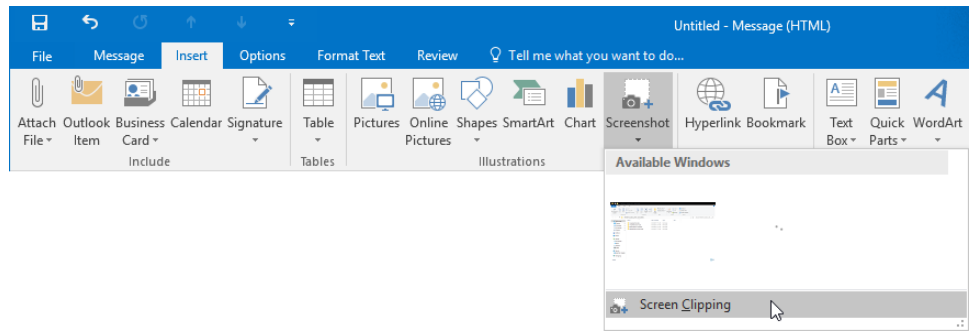
When SmartArt has been inserted into your message and it is selected, you will see the SmartArt Tools contextual tab set appear on the ribbon. Using the tools in these two contextual tabs, you are able to further customize SmartArt in a variety of different ways, including changing the layout, style,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

THE SCREENSHOT TOOL

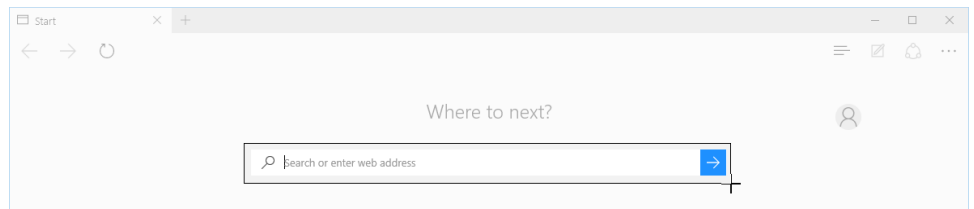
Another type of illustration that you can add to a message is a **screenshot** (an image capture of any open window on your desktop). To use the Screenshot tool, click Insert → Screenshot and choose the window image that you want to insert:



Alternatively, you can click Insert → Screenshot → Screen Clipping:

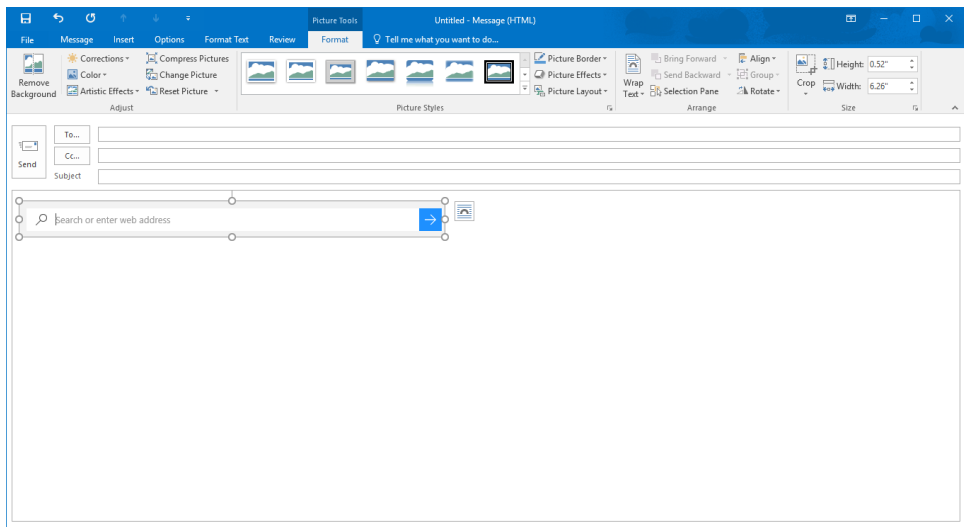


This option allows you to click and drag over the portion of the screen that you want to capture:



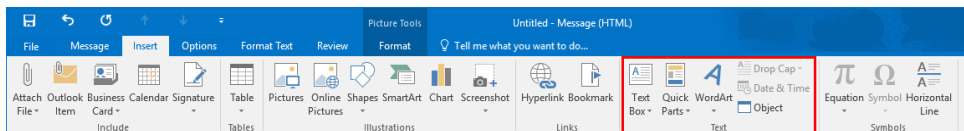
(Note that if you would like to take a screen clipping of a specific window, that window needs to be displayed in the background, not minimized.)

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



THE TEXT GROUP

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

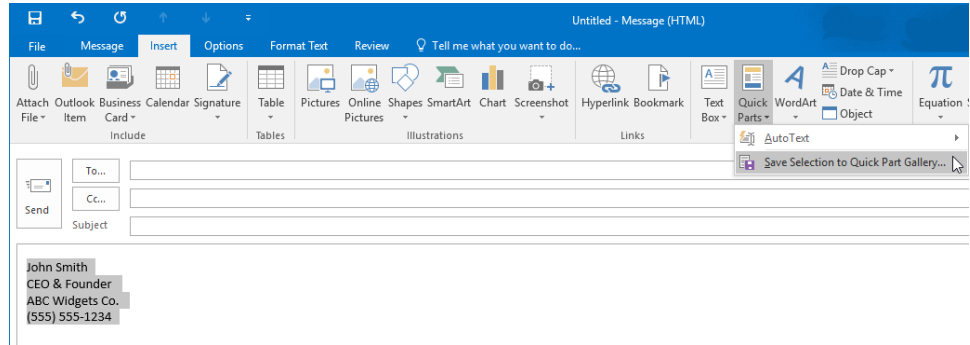


QUICK PARTS

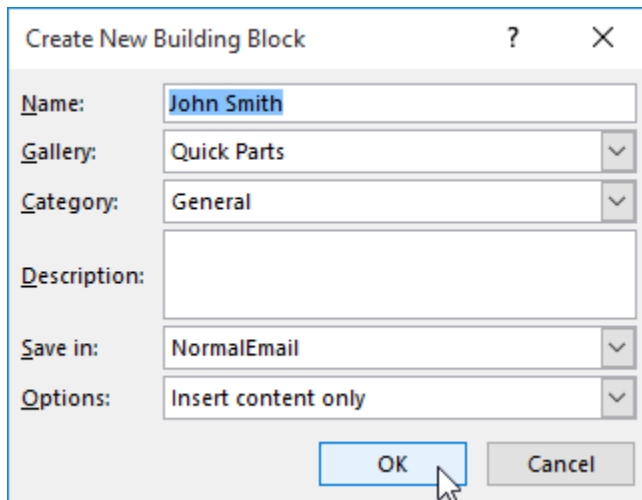
Quick Parts allow you to create and save specific pieces of content that are frequently reused. This can include titles, author names, and other similar content. Once a Quick Part has been created, it can then be quickly added to a message to help save you time.

Creating Quick Parts

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

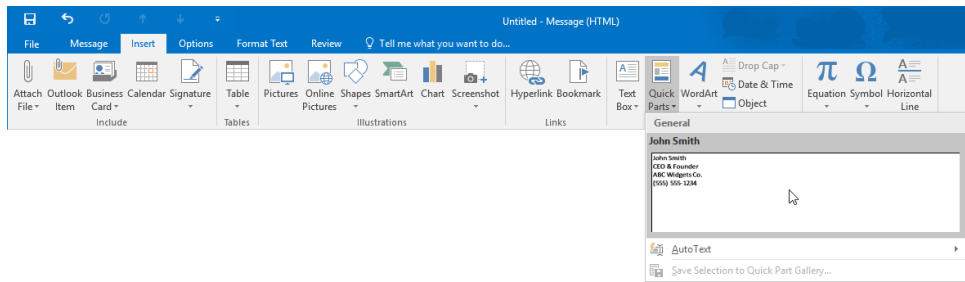


The Create New Building Block dialog box will open. Here, you can give this new building block a name and description. Additionally, you can categorize it into a gallery and category. To create the new Quick Part, click OK:

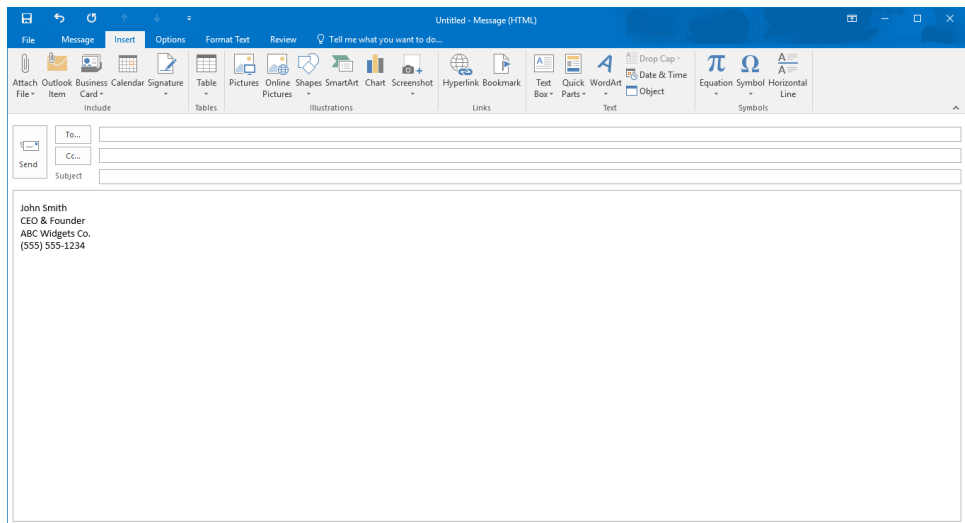


Using Quick Parts

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



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



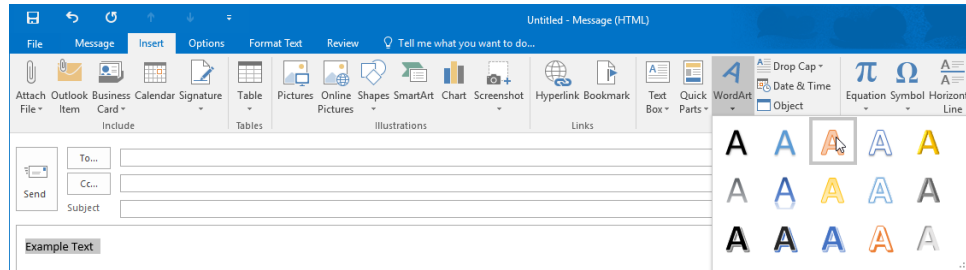
About AutoText

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

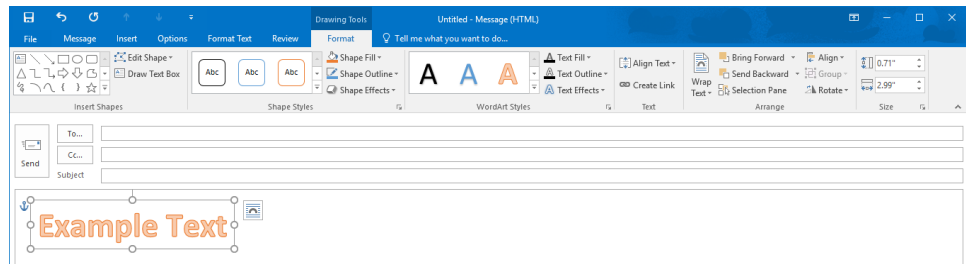
WORDART

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

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



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



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

CONTEXTUAL TABS

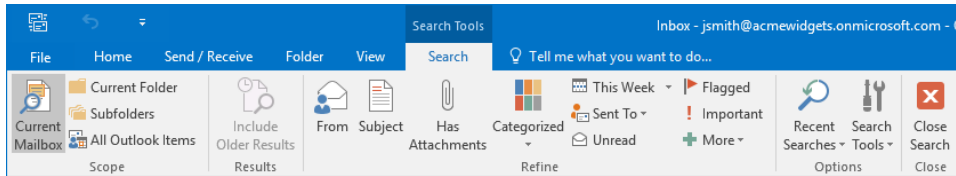
By default, Microsoft Office Outlook 2016 includes a set number of tabs depending on the Outlook workspace that is displayed. The main Outlook 2016 window includes four tabs (not including the File tab):



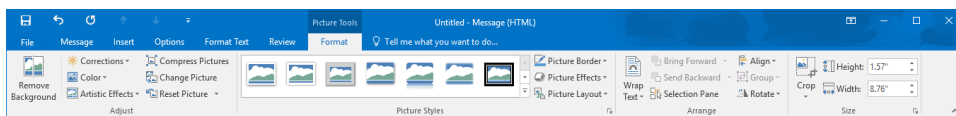
Inside the message window you will find five different tabs:



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

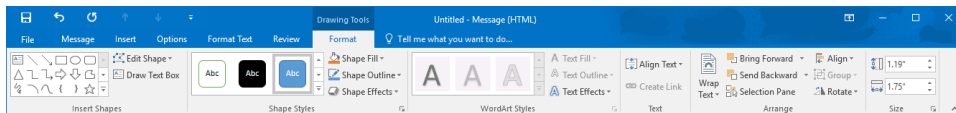


Or, if you add an image to a message, the Picture Tools – Format contextual tab will be displayed:



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

Drawing Tools



SmartArt Tools

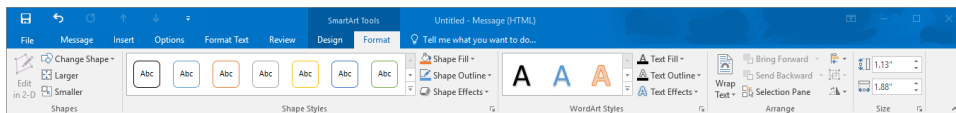


Table Tools

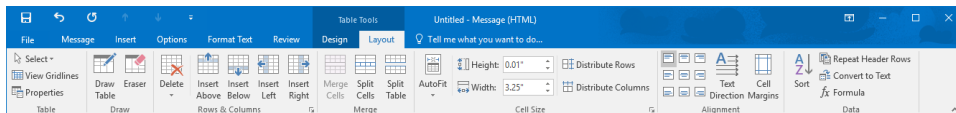
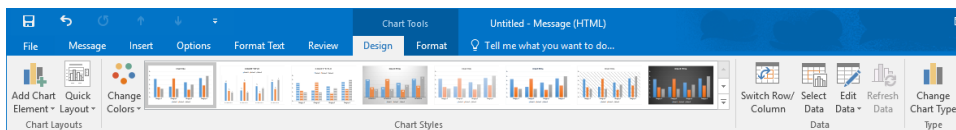
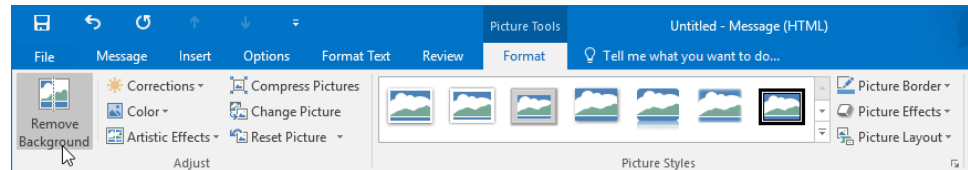


Chart Tools

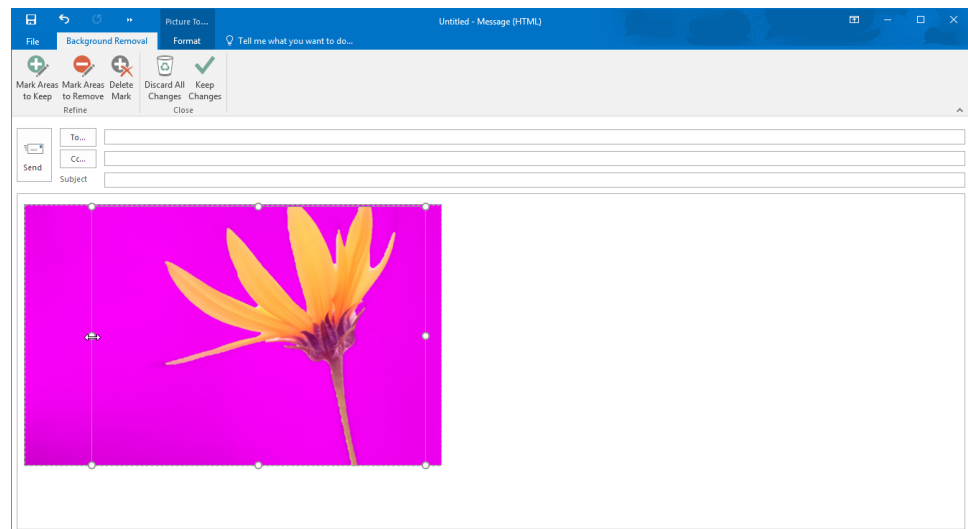


THE BACKGROUND REMOVAL TOOL

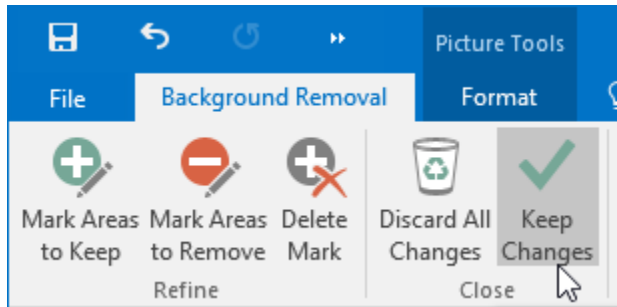
The Background Removal tool is used to remove the background from an image that has been inserted into a message. To use this tool, first click to select the image in question. Then, click Picture Tools – Format → Remove Background:



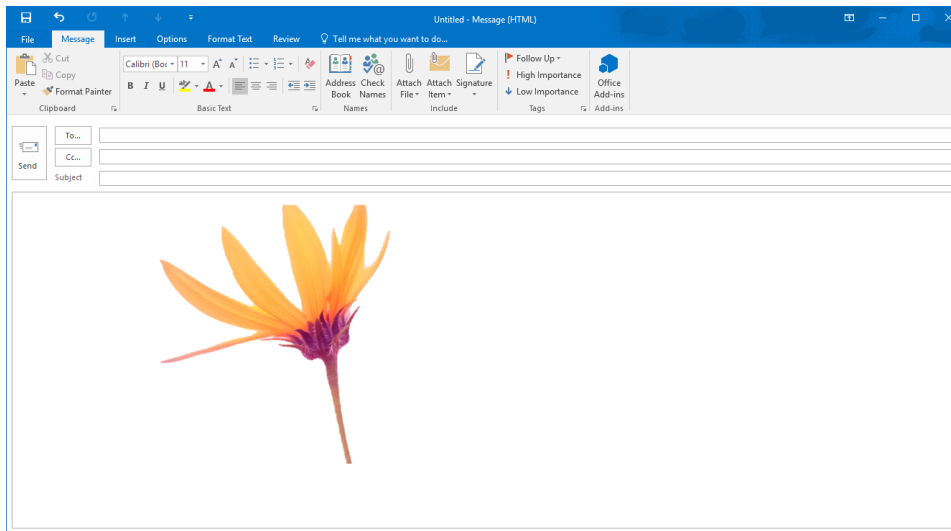
Once selected, you can reposition and/or resize the rectangle over the image so that it encapsulates the primary subject of the picture. In this case, the flower is the main subject:



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

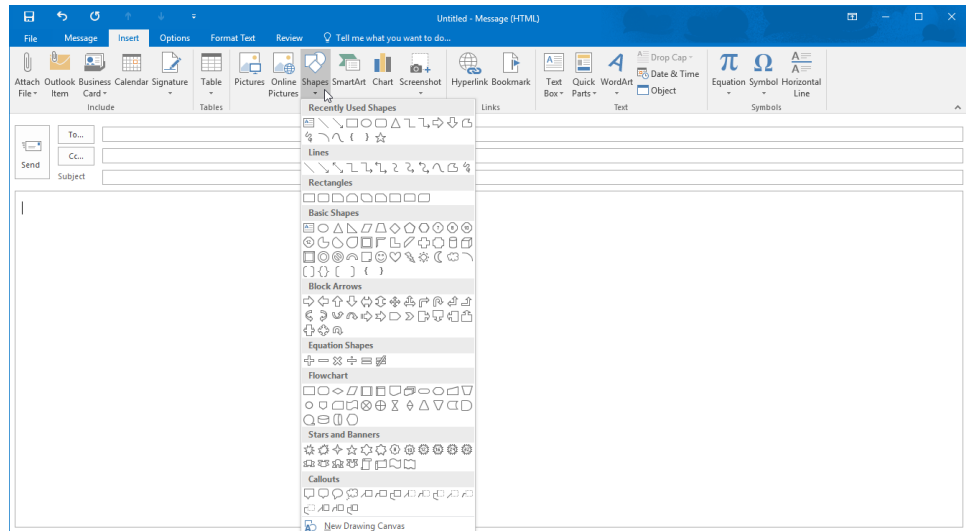


The background that was marked will then have been removed:



GALLERIES

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



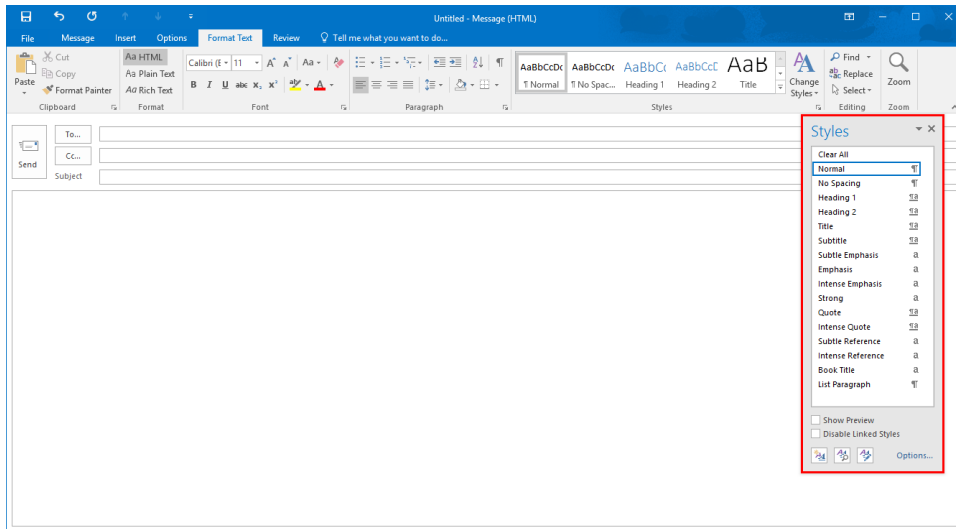
STYLES

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

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

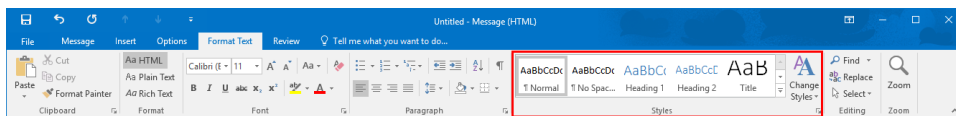


The option button in this group opens the Styles task pane, where you can view and manage all styles:

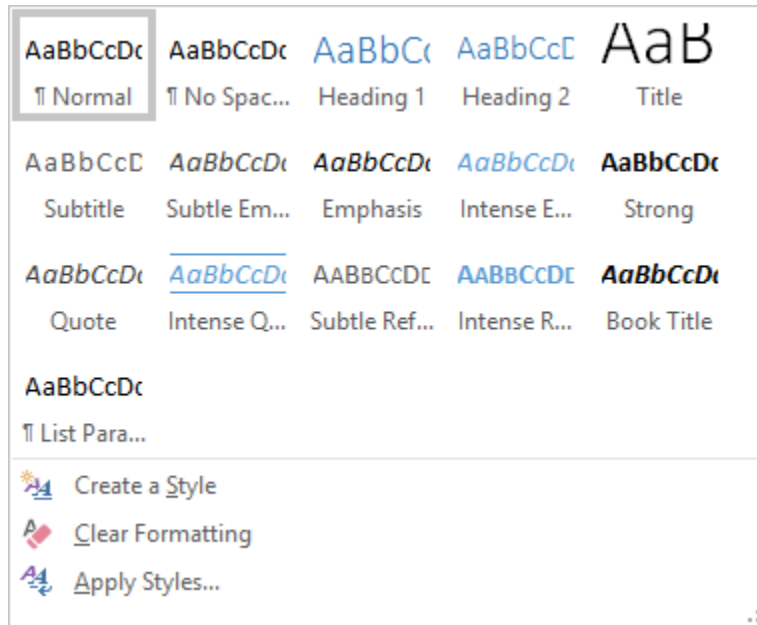


Applying a Style

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

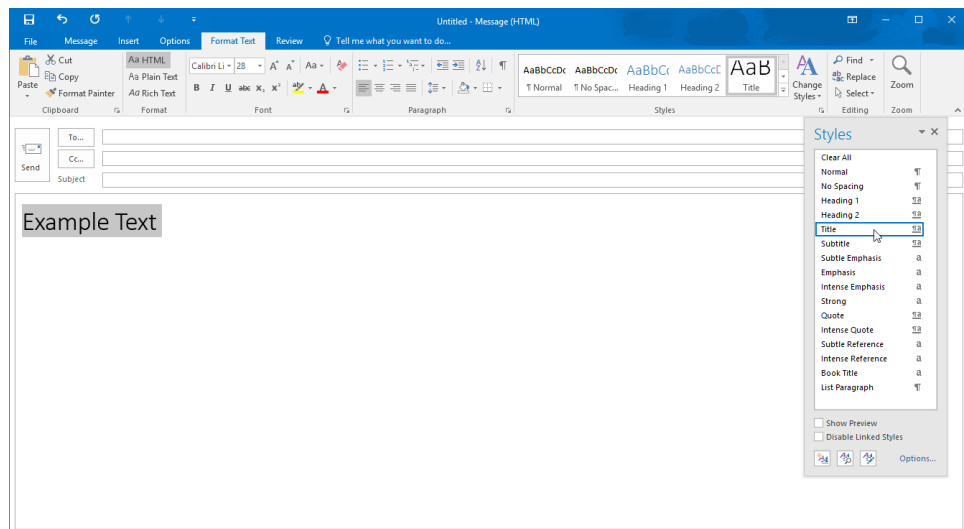


If you click the More button (☰) in the lower right-hand corner of the gallery, you will see additional styles:



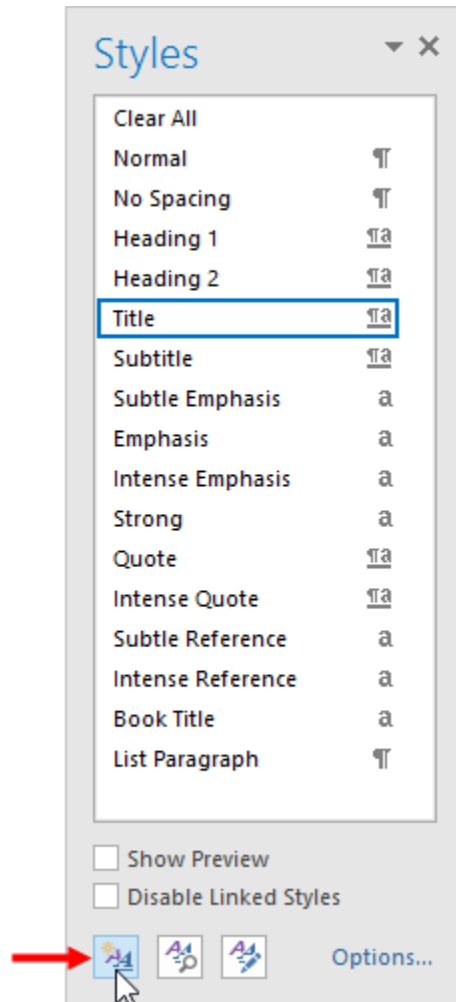
To apply any of these styles, first select the text that you want to format and click a style.

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

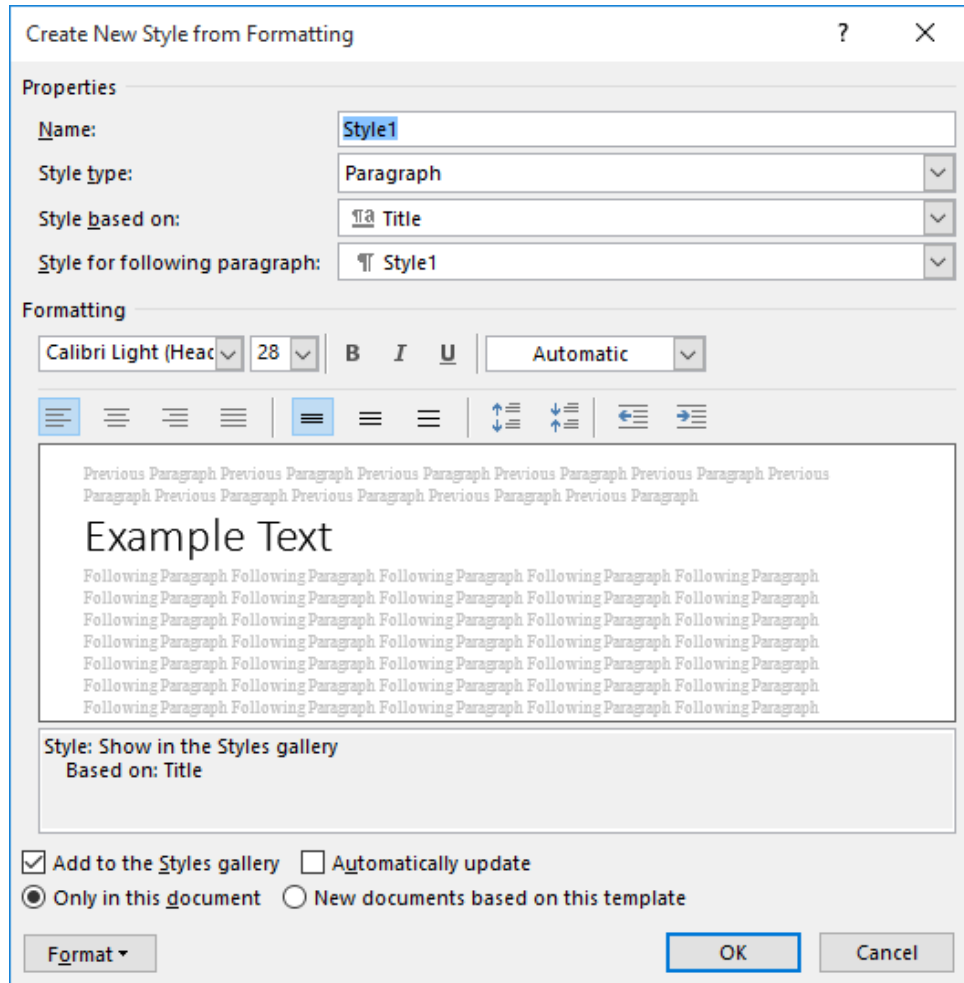


Creating Styles

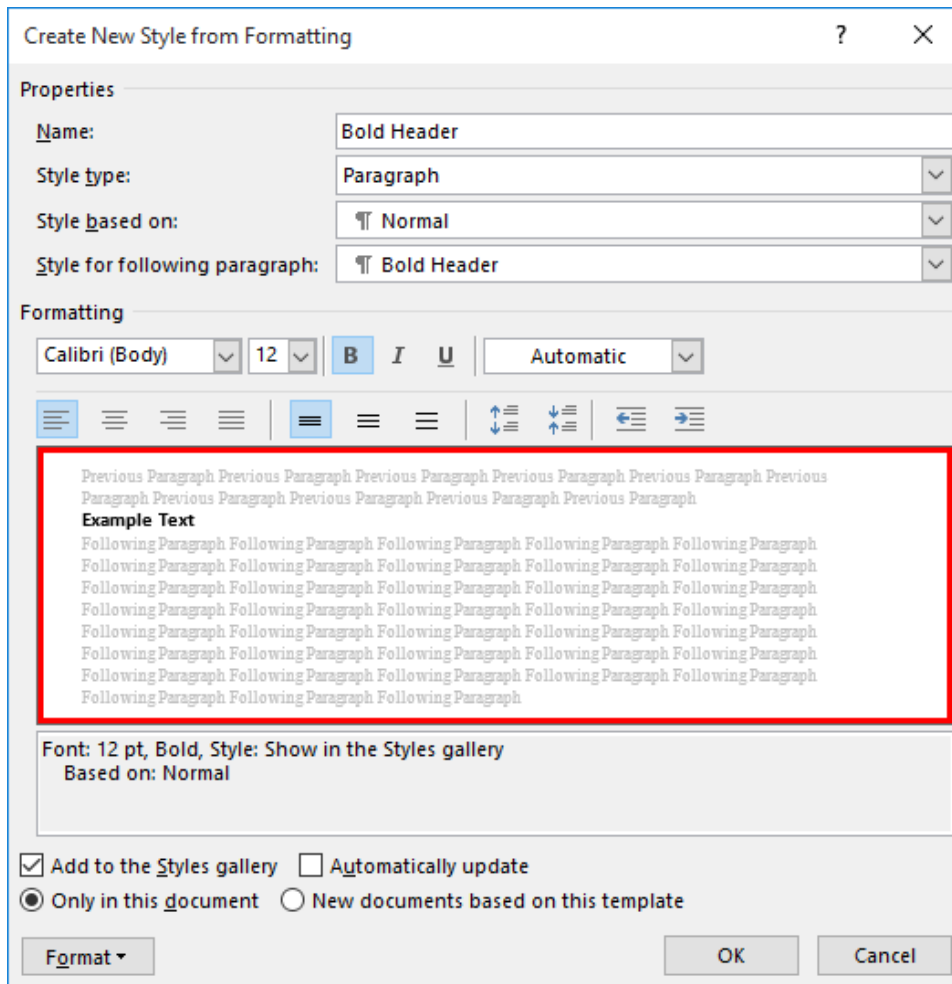
You can also create new styles from scratch. To do this, click the New Style button in the bottom left-hand corner of the Styles task pane:



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



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

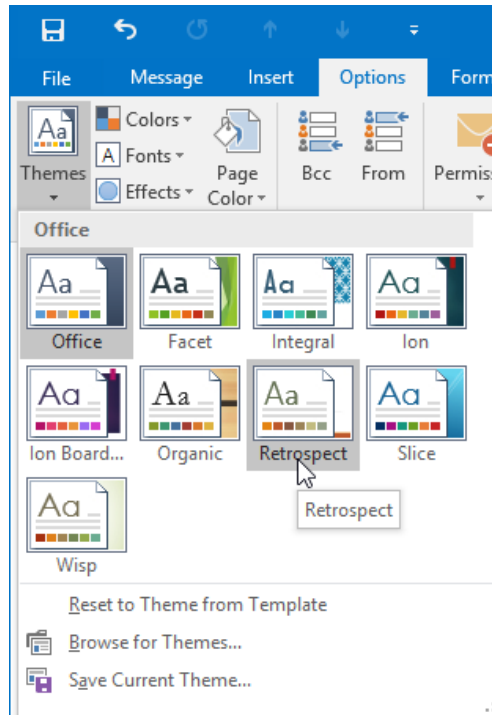


Once you have finished constructing a new style, you can then choose to add this new style to the Styles gallery, as well make it available in only this document (message) or any messages that are based on this template.

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

THEMES

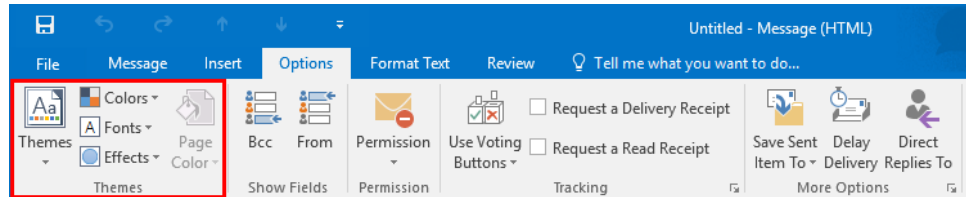
Themes are a preset combination of colors, fonts, and effects. They allow you to apply a consistent look amongst all of the content that you create or add to an e-mail message. Several themes are available by default, and are found by clicking Options → Themes:



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

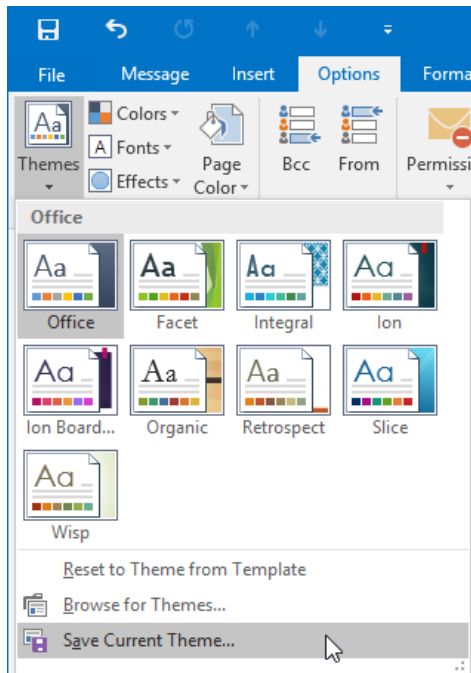
Creating Custom Themes

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

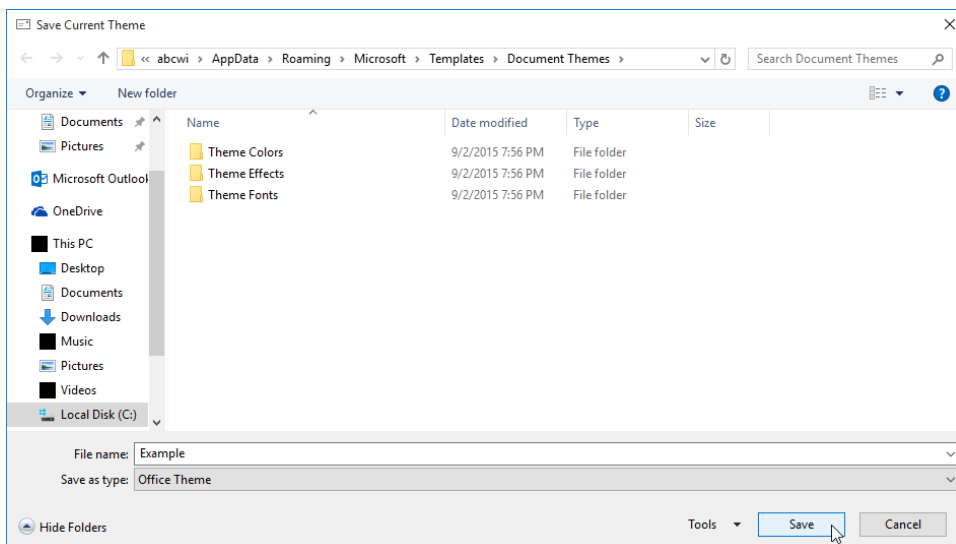


Saving Custom Themes

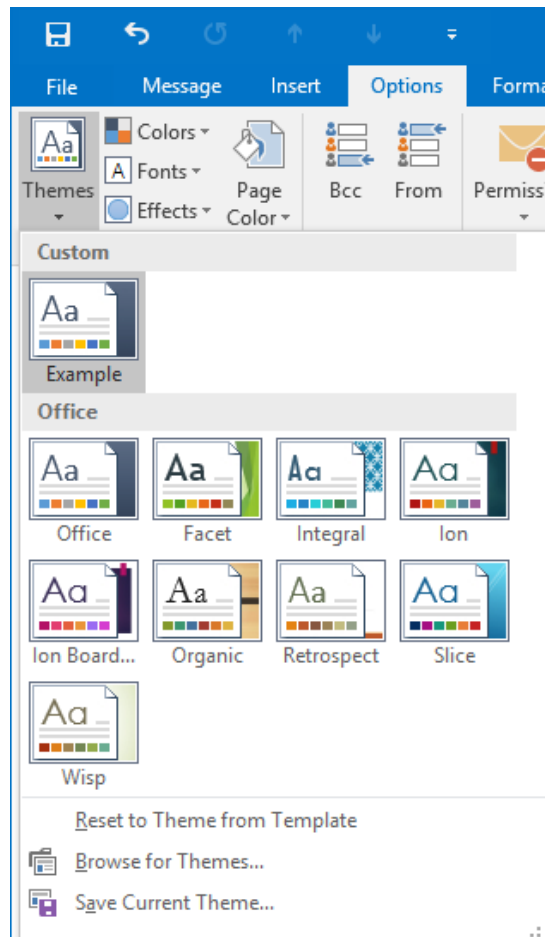
Once you have found a combination of theme settings that you would like to apply, click Options → Themes → Save Current Theme:



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



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

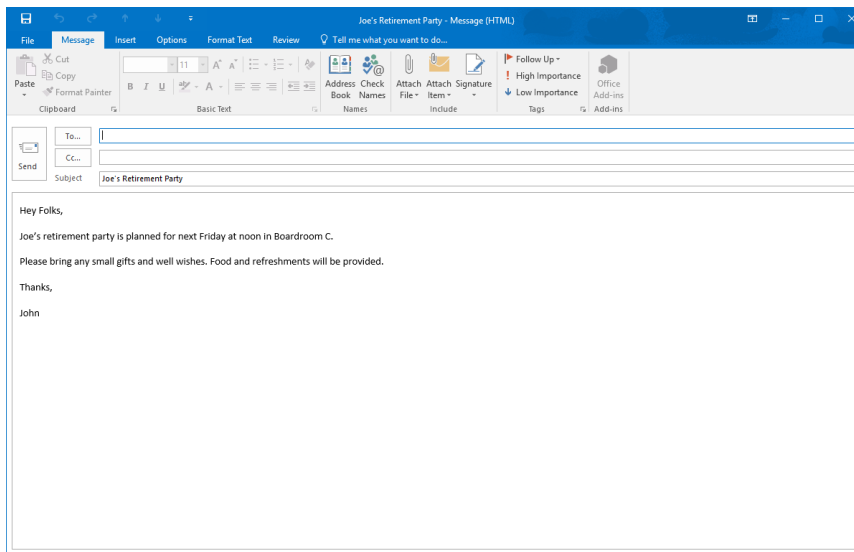


ACTIVITY 2-5

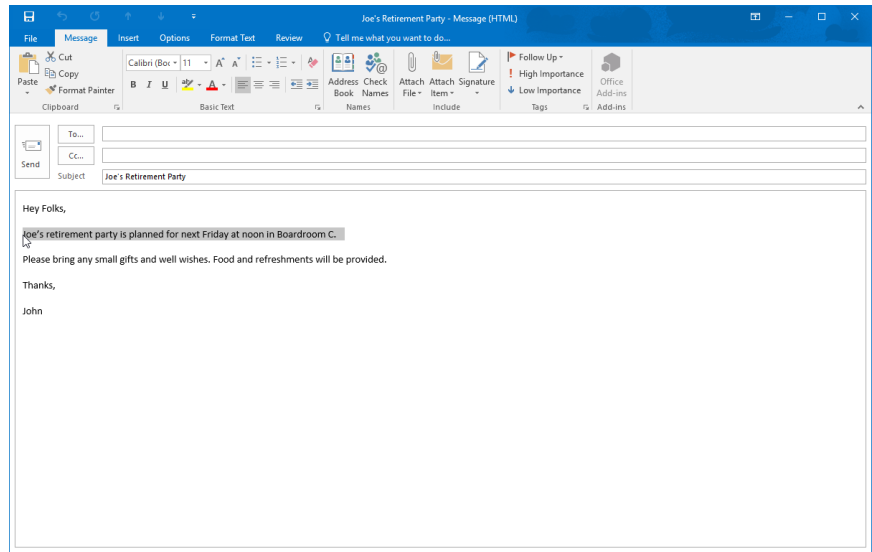
Enhancing an E-mail Message

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

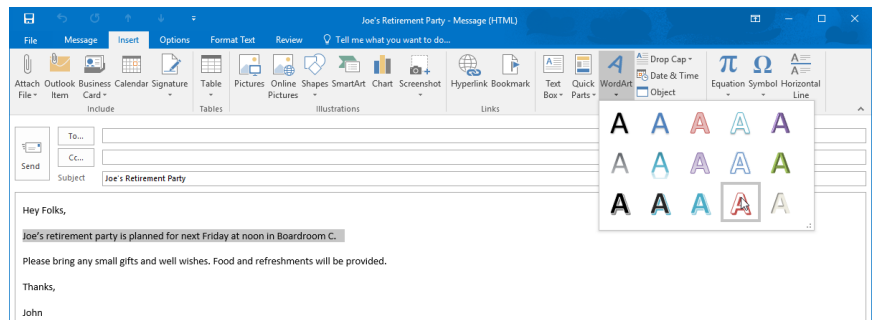
1. To begin, open Outlook 2016. Within your Exercise Files folder, double-click the Activity 2-5.msg file to open it. This message will be displayed in a separate Outlook window:



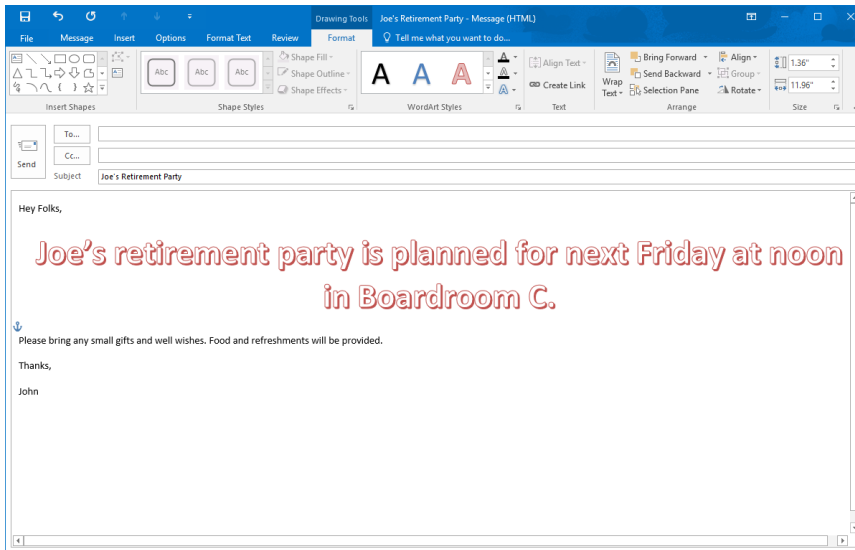
2. Use your cursor to select the first sentence after the greeting line:



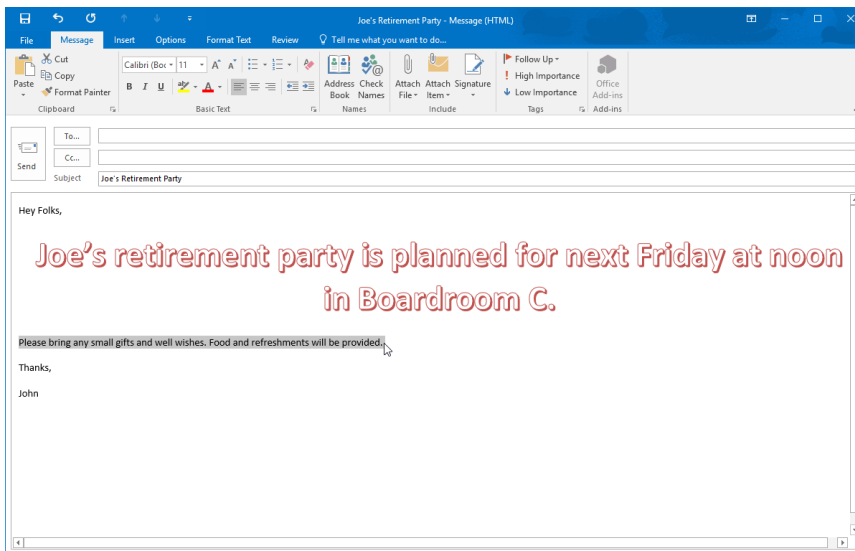
3. With the first sentence still selected, click Insert → WordArt. Choose the style highlighted below:



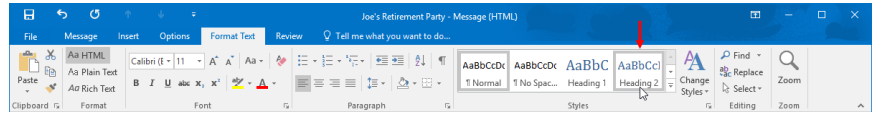
4. The selected sentence will now have been converted into the WordArt style that you selected:



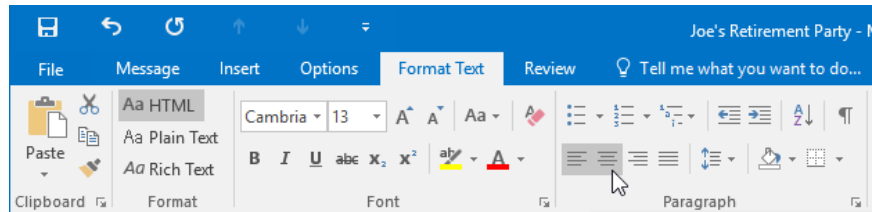
5. Now, use your cursor to select the next line in this message:



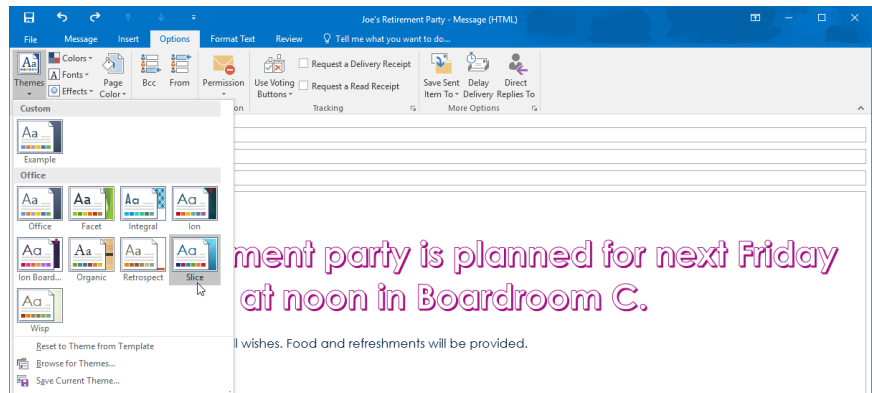
6. Click Format Text → Heading 2 (inside the Styles gallery):



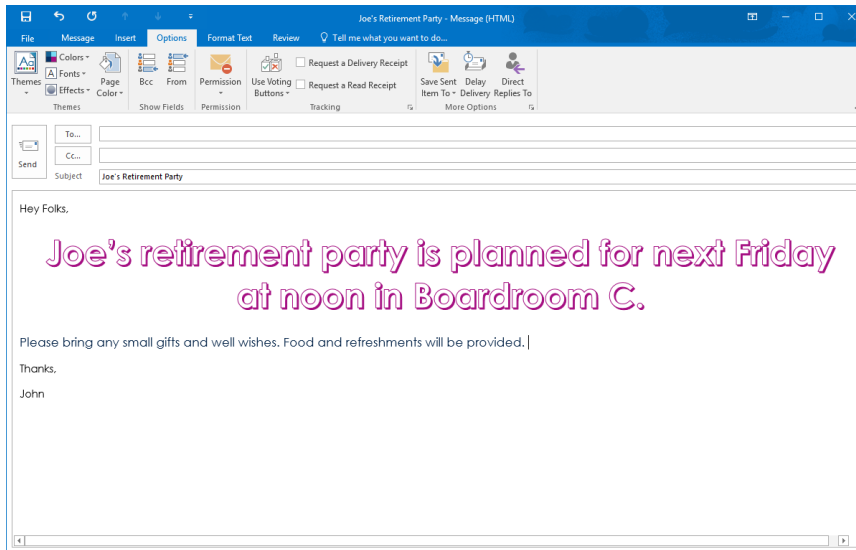
7. Center the selected text by clicking Format Text → Center:



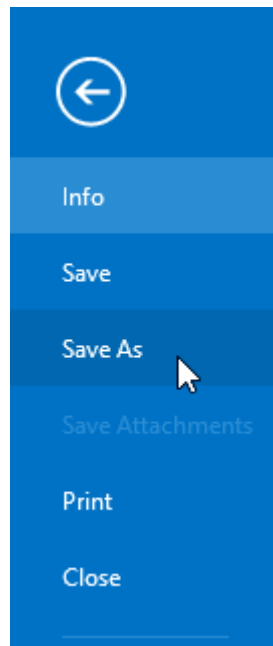
8. Now, you need to apply a new theme to this message so that it is more consistent. Click Options → Themes → Slice:



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



10. Click File → Save As:



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

TOPIC F: Manage Automatic Message Content

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

Topic Objectives

In this topic, you will learn:

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

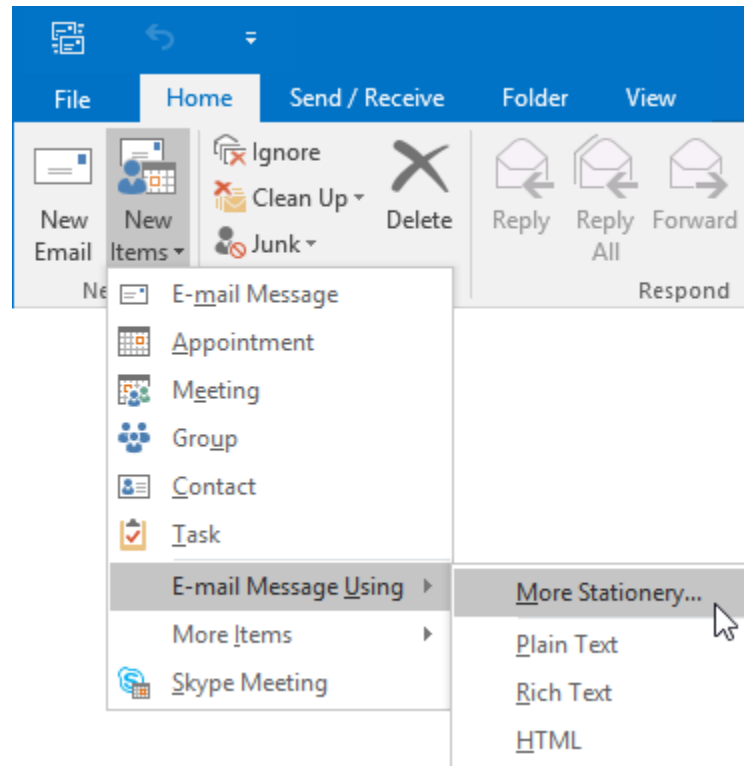
STATIONERY AND THEMES

The **Stationery** feature in Outlook allows you to apply a variety of different design templates to an outgoing message. These templates change the background of the message body to a selected color or pattern. While they are similar to themes, you are unable to create your own stationery and you are limited to the templates that are provided by default.

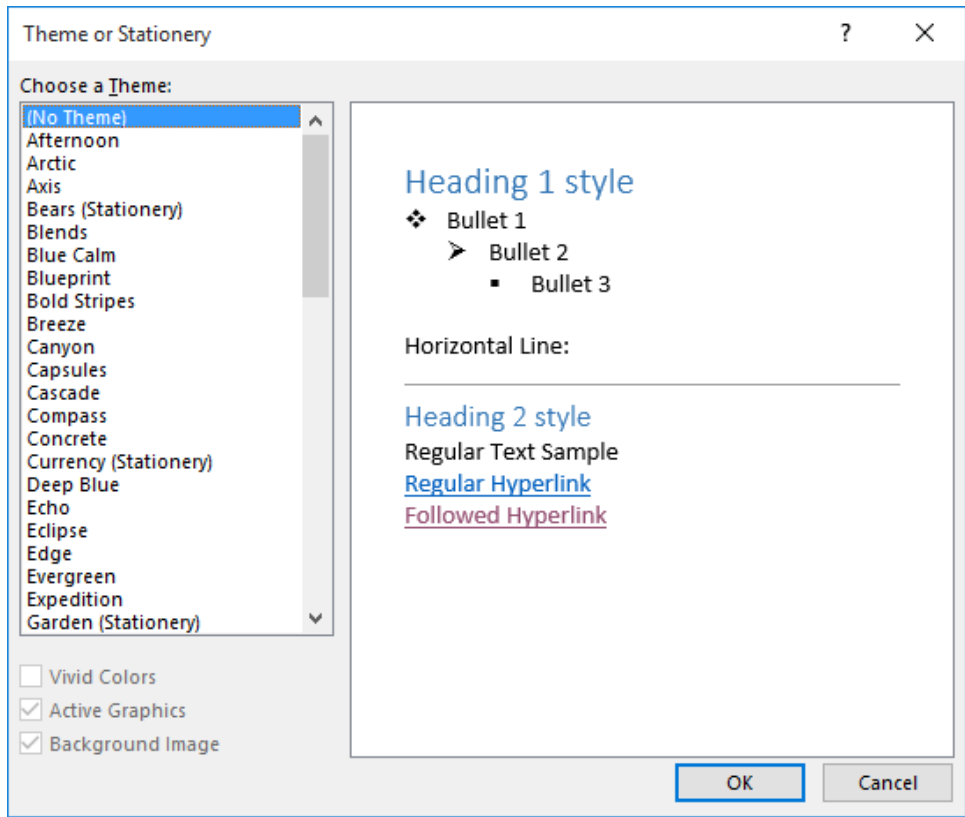
Themes offer a little more flexibility and can change a greater range of elements within a message. You are able to create a new theme from scratch or use one of the many default options. Additionally, themes can not only modify the background color of a message, but also its text, colors, and effects. (These themes are different than those applied from within the message itself.)

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

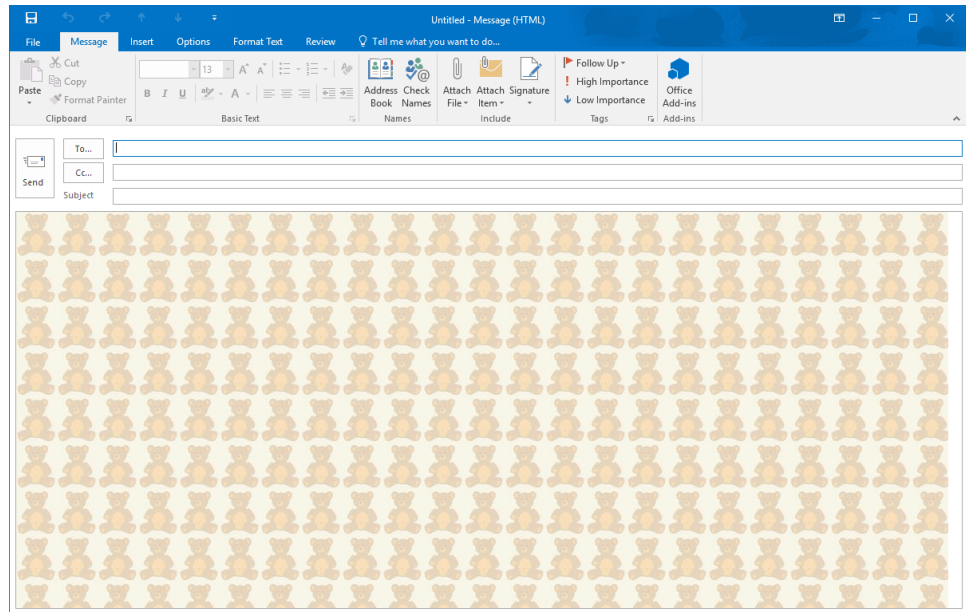
To create a single message using stationery or a theme, click Home → New Items → E-mail Message Using → More Stationery:



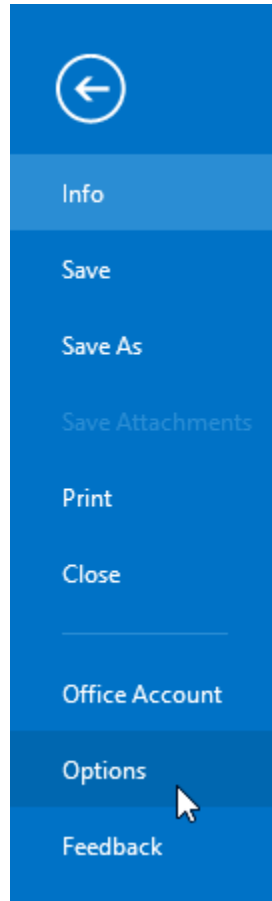
This action will display the Theme or Stationery dialog box. Using the list on the left-hand side of this dialog box, you can choose the theme or stationery template that you would like to use to create the message:



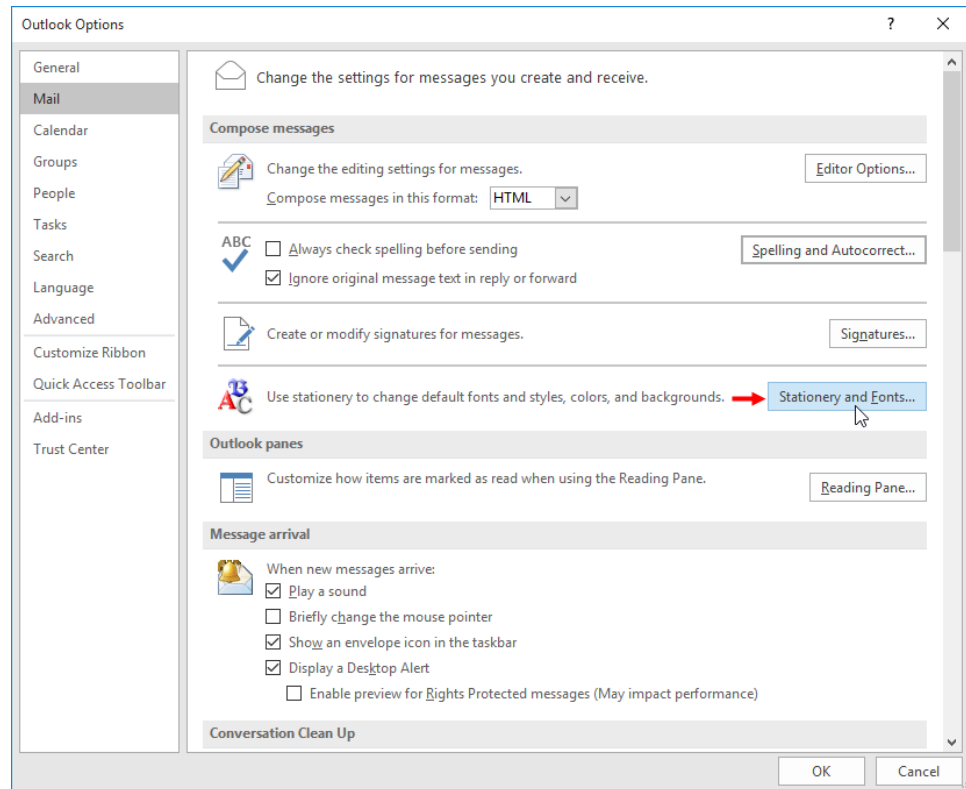
Once you click the OK button, a new Message window will open with that stationery or theme applied. From there, you may construct your message as you would normally:



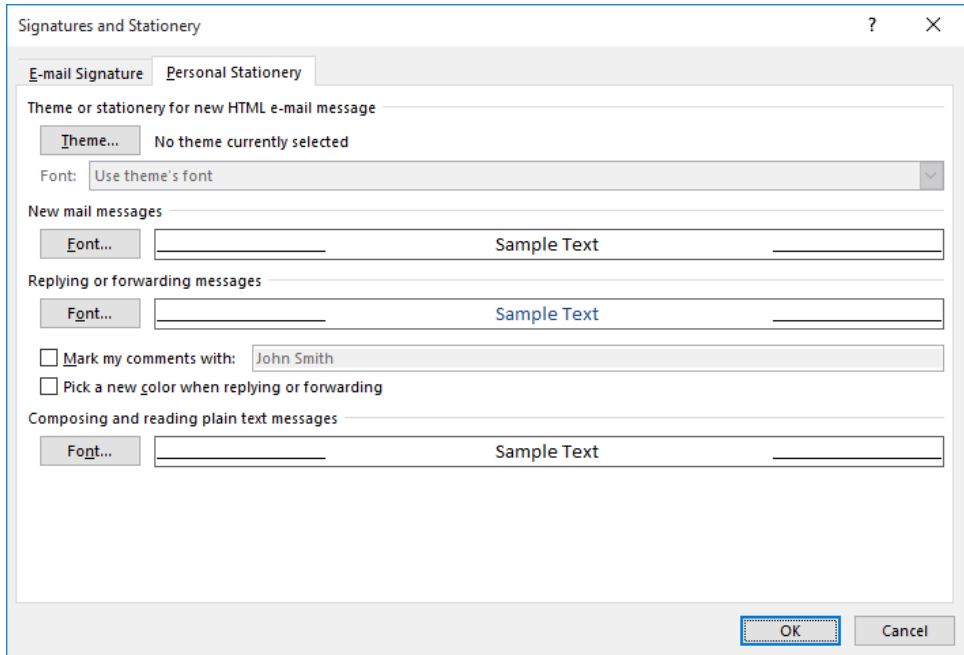
If you have found a theme or stationery template that you would like to use as the basis for all outgoing messages, you can have it automatically applied whenever you create a new message. To do this, first click File → Options:



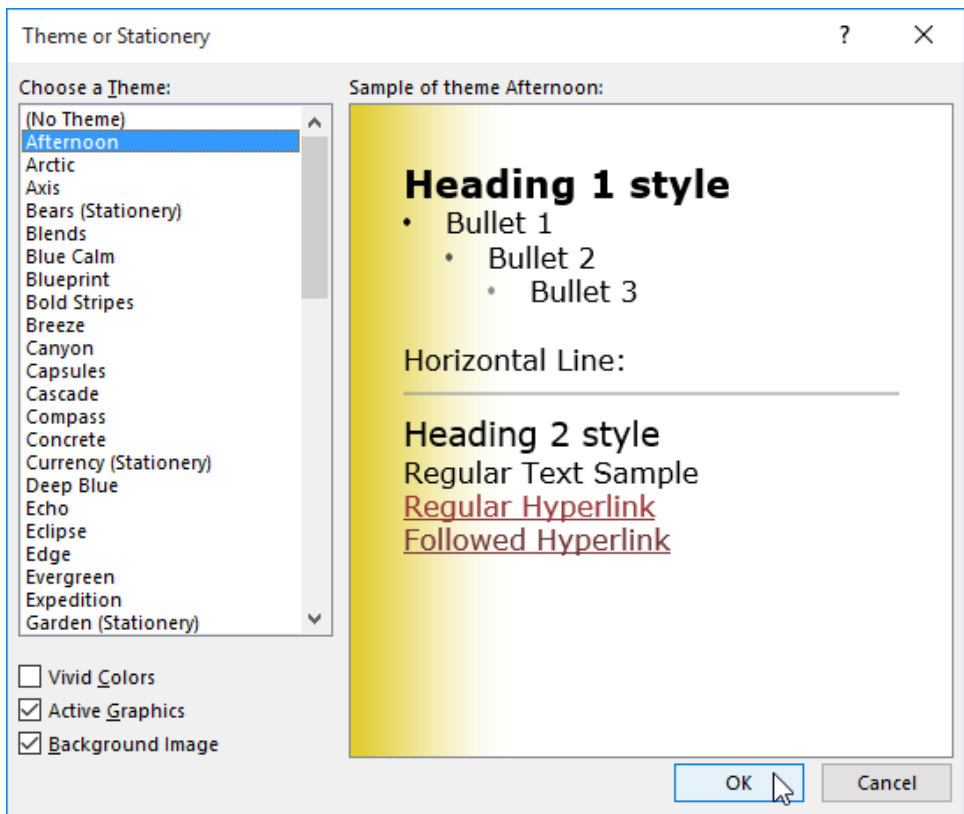
Inside the Outlook Options dialog box, click the Mail category. Then, click the “Stationery and Fonts” button:



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



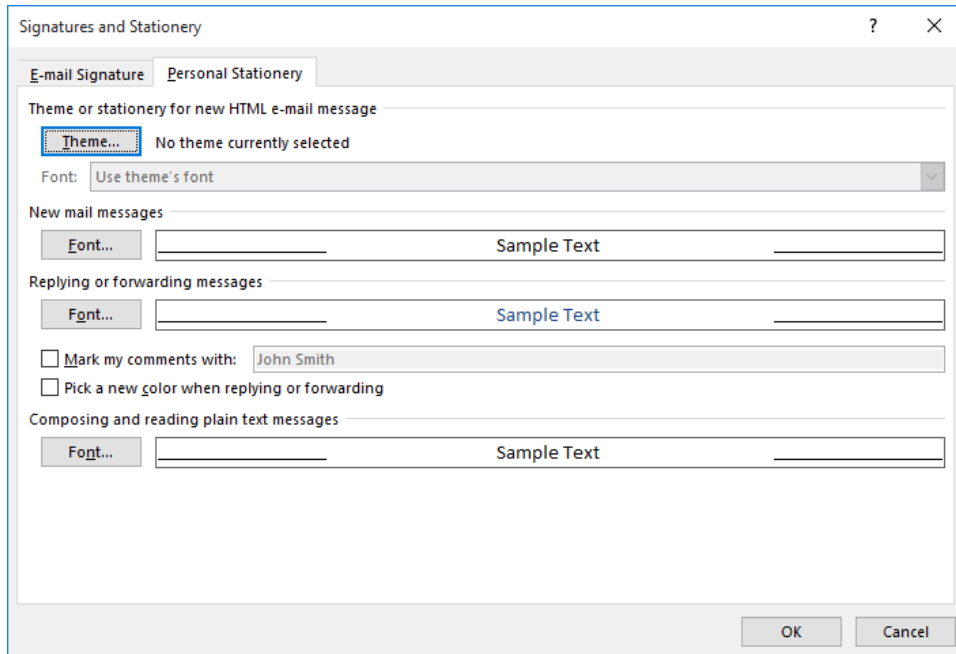
Click the Theme button near the top of the dialog box to display the Theme or Stationery dialog box. From the list on the left of this dialog box, you can choose the theme or stationery template that you would like to have automatically applied to all future messages that you create:



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

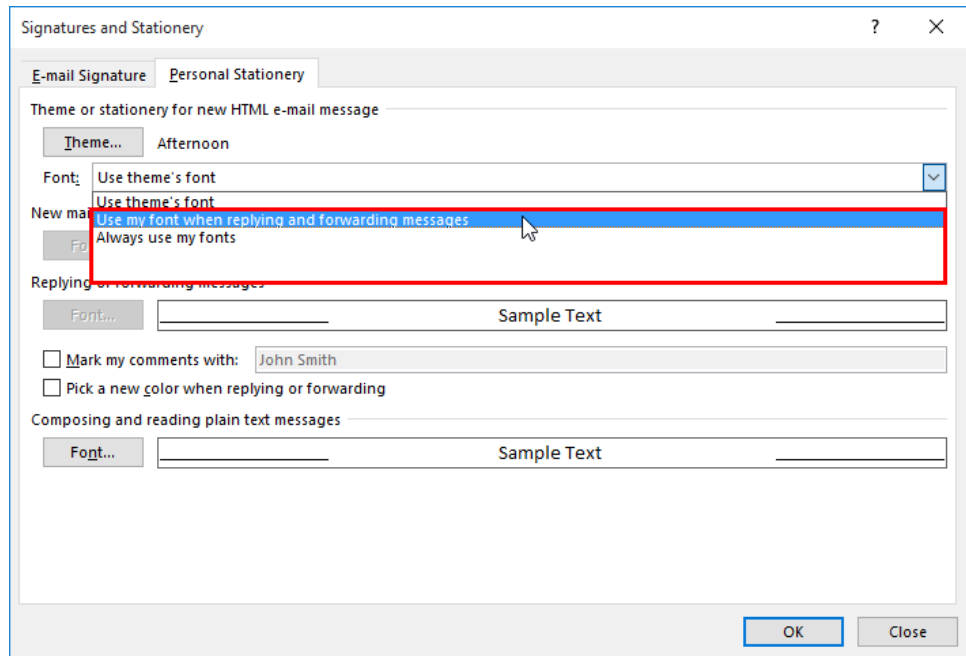
FONT OPTIONS

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

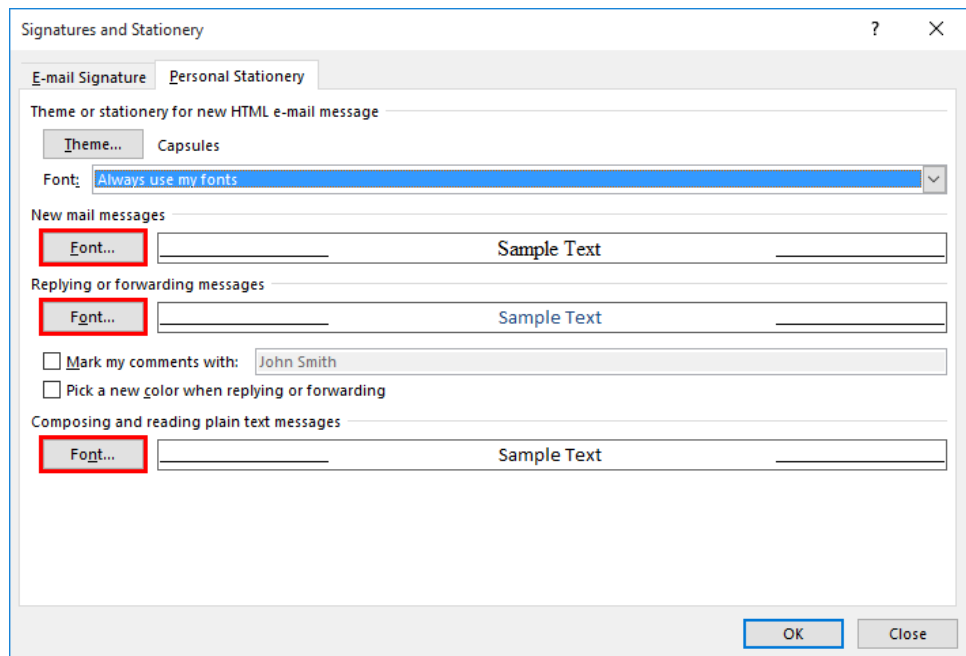


(Remember, to open this dialog box, open the Outlook Options dialog box first. Then, click the Mail category and click the “Stationery and Fonts” button.)

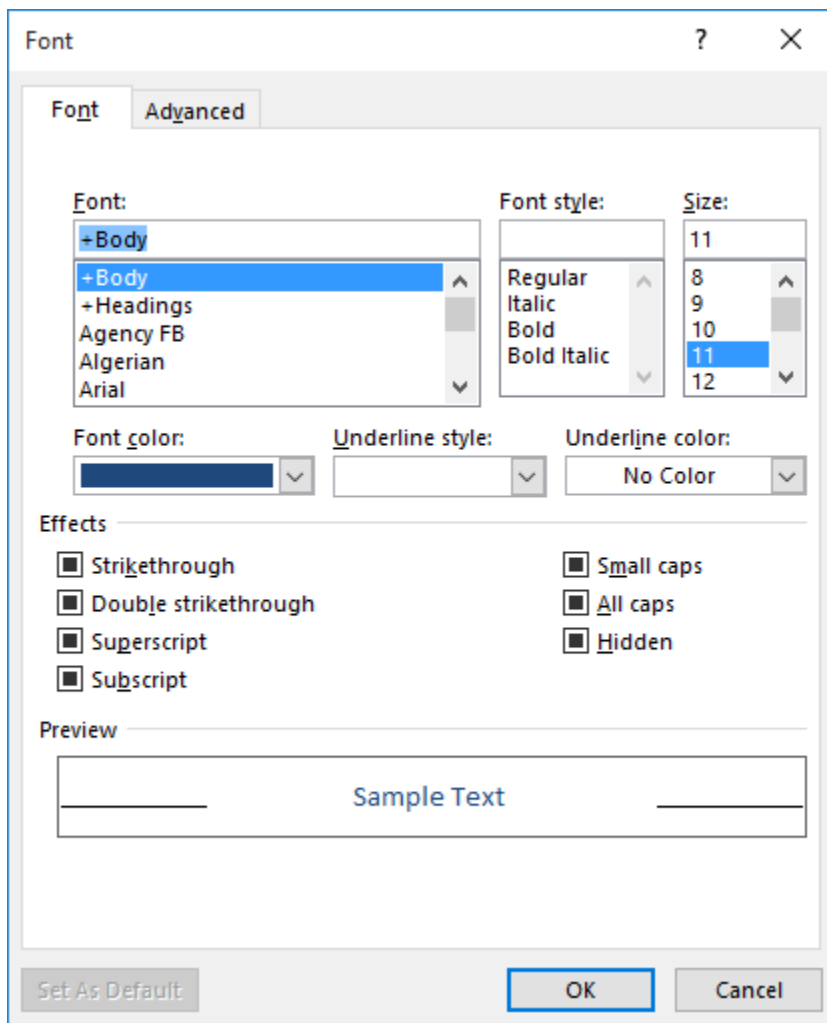
To set the default font for each type of mail message, choose one of the bottom two options from the first menu:



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



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



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

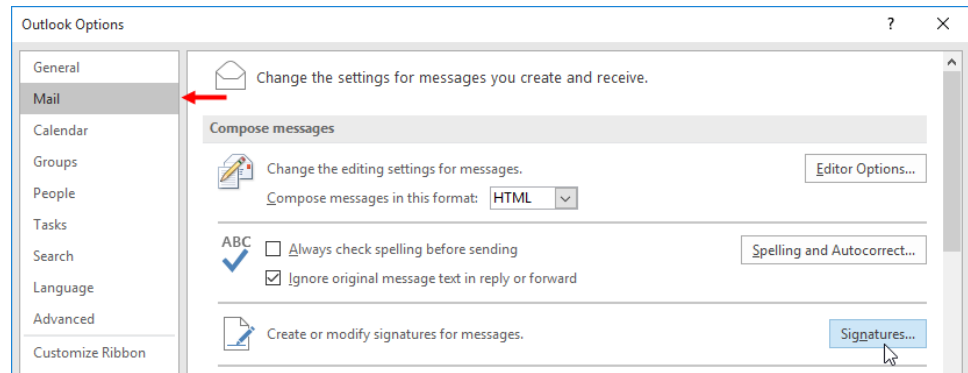
SIGNATURES

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

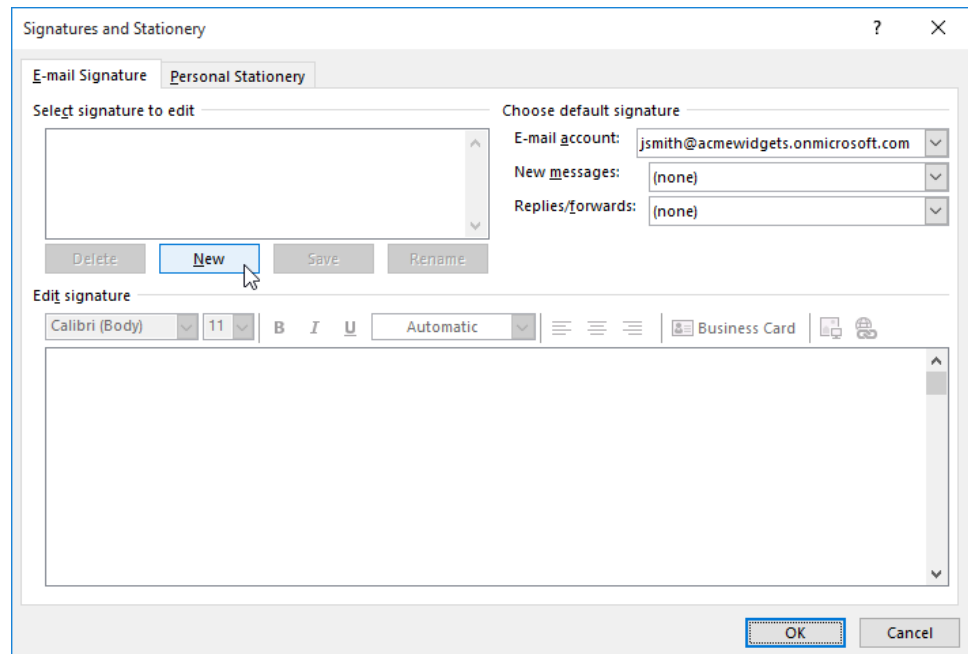
signature for replying to incoming messages that is different from another signature that is used when sending a new message.

Creating a Signature

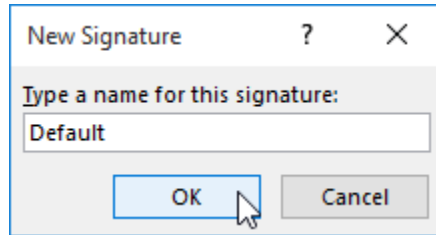
To start creating your signature, click File → Options. Inside the Outlook Options dialog box, click the Mail category and then click the Signatures button:



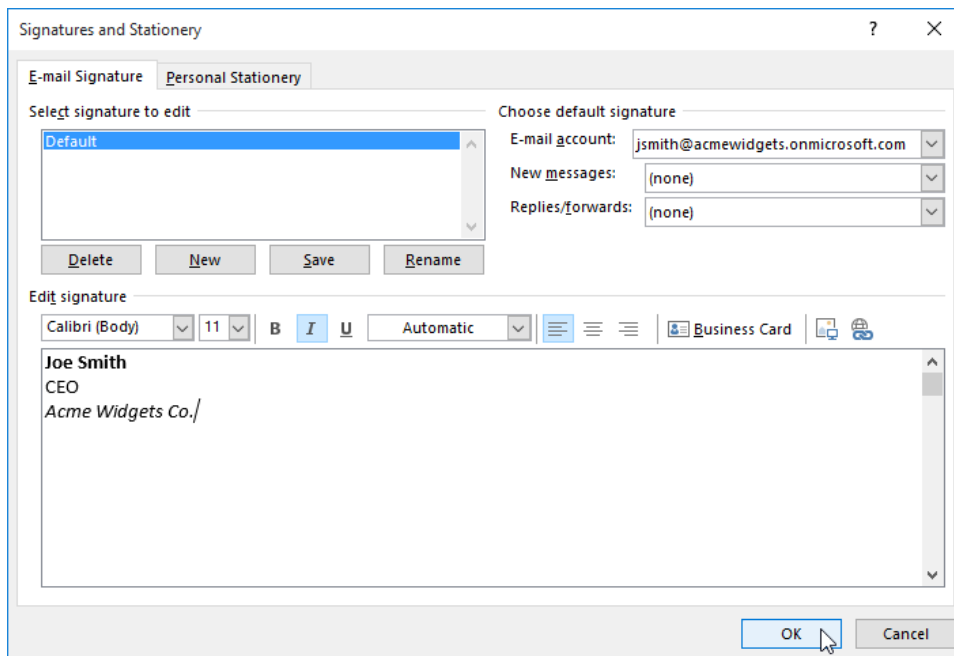
This action will open the E-Mail Signature tab of the Signatures and Stationery dialog. To start creating your signature, click the New button:



You will then be prompted to name your signature:

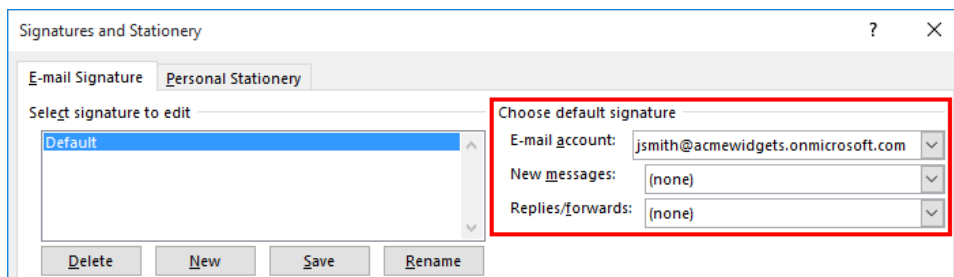


Once you type a name and click OK, you will be returned to the Signatures and Stationery dialog. You can now use the bottom set of options to type and format your text. Once you're ready, click OK to complete the signature:



Setting Signature Options

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

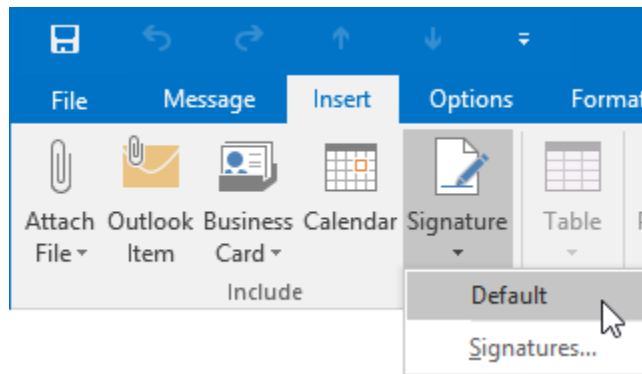


The top menu is used to choose what e-mail account you want to set signature options for. Then, you can choose what signature you want to

use for new messages, as well as replies and forwards. Once your options are set, click OK.

Using Signatures

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



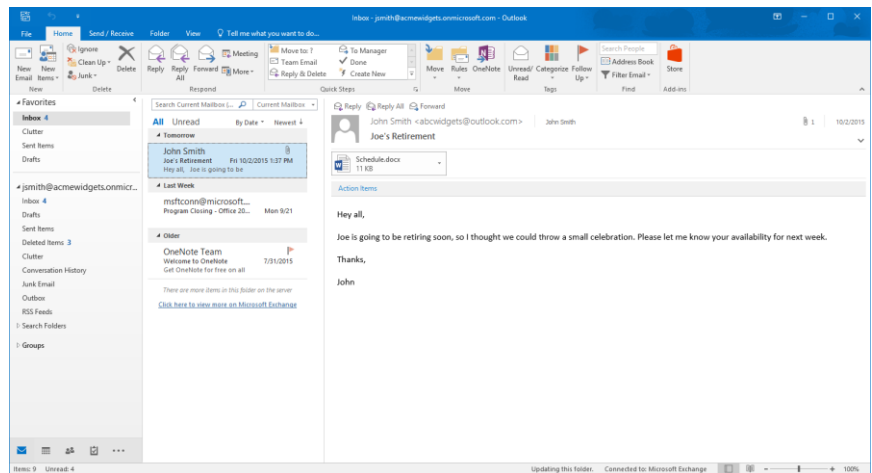
You can also click the Signatures command in this drop-down menu to open the Signatures and Stationery dialog.

ACTIVITY 2-6

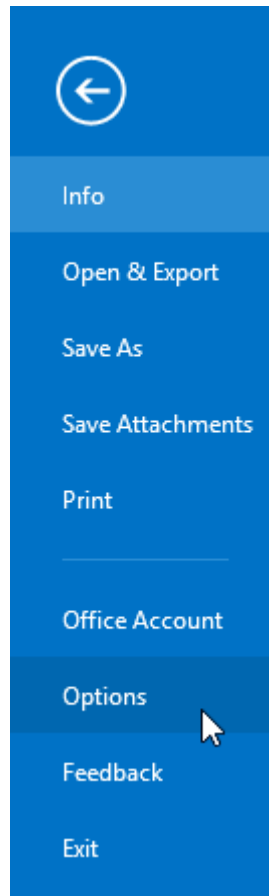
Managing Automatic Message Content

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

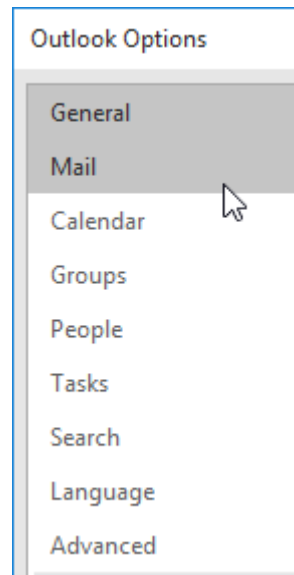
1. To begin, open Outlook 2016:



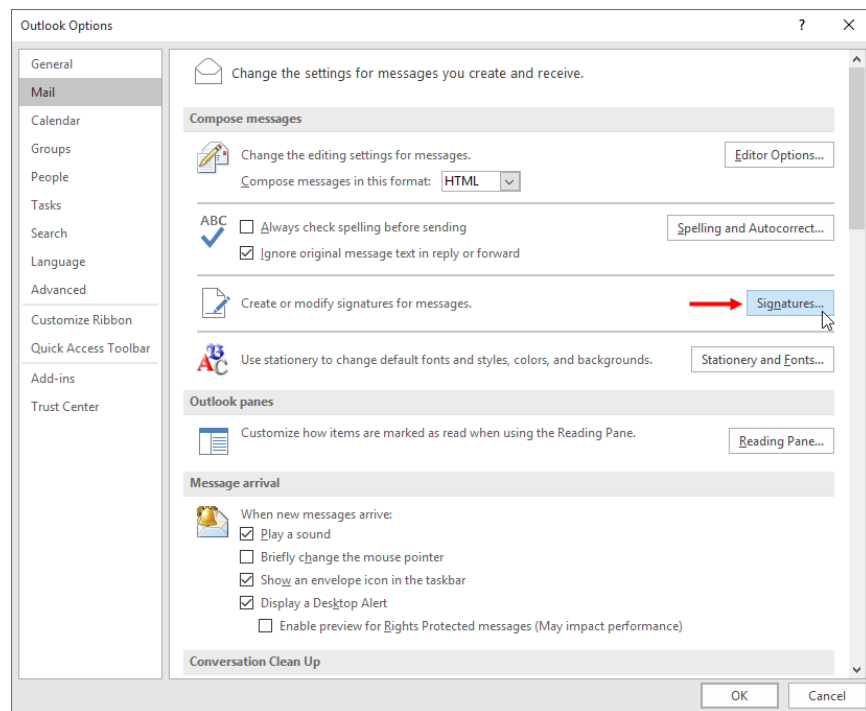
2. Click File → Options:



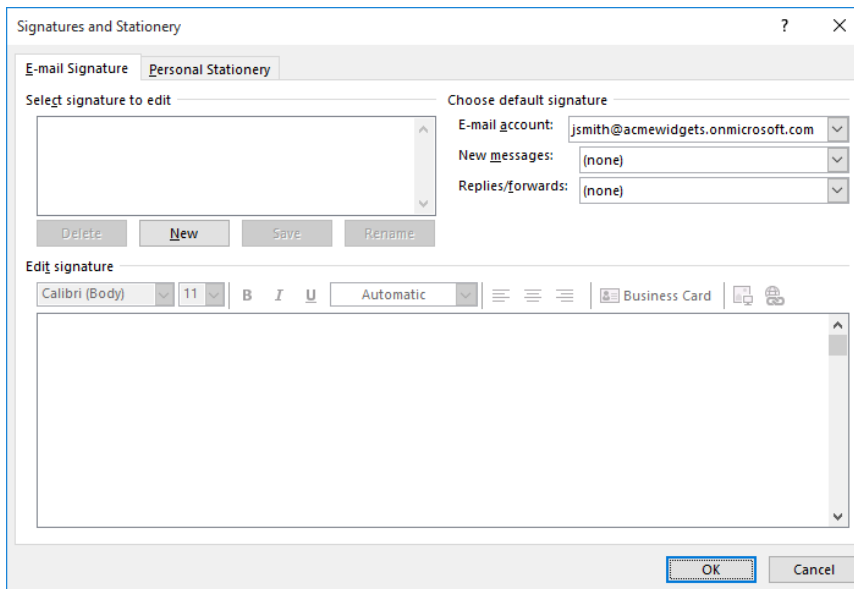
3. In the Outlook Options dialog box, click the Mail category:



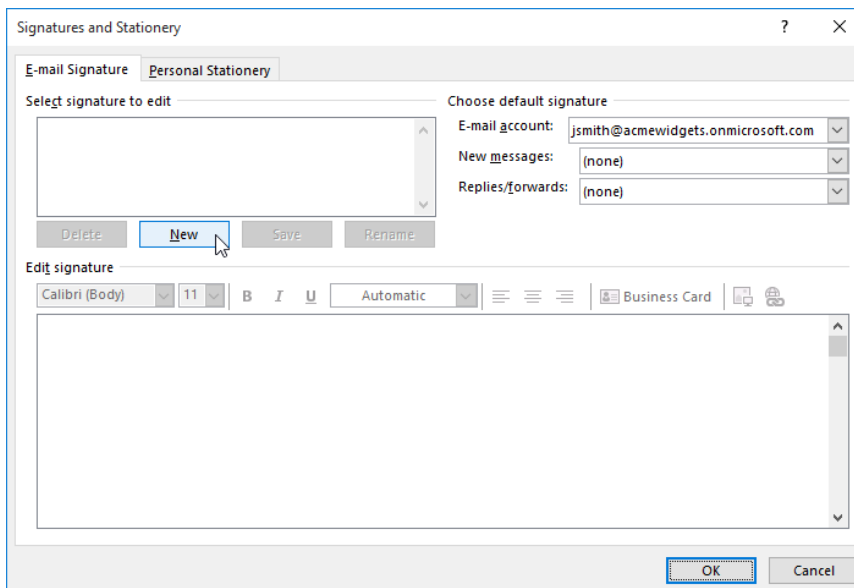
4. With the Mail category now displayed within the Outlook Options dialog box, click the Signatures button:



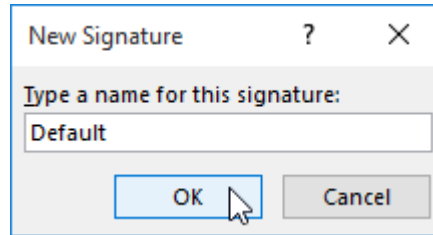
5. The Signatures and Stationery dialog box will now be shown with the E-mail Signature tab displayed:



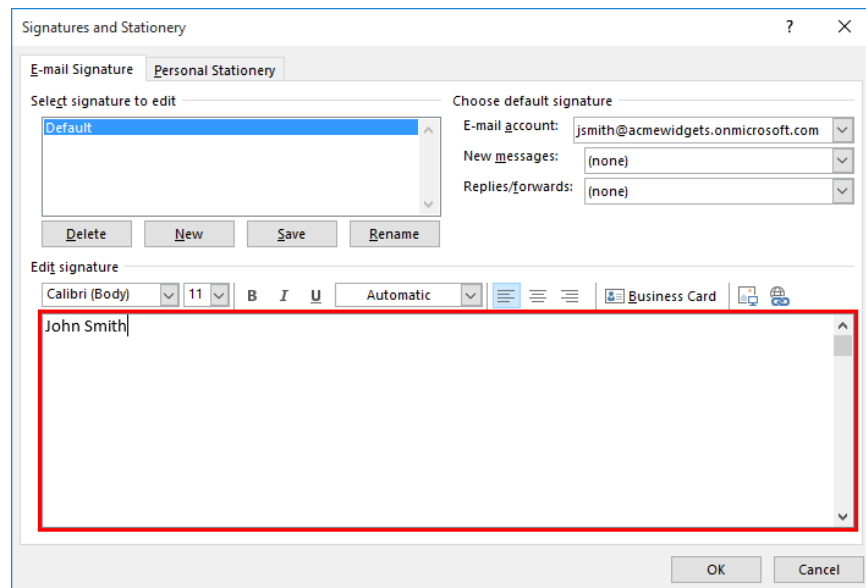
6. Click the New button:



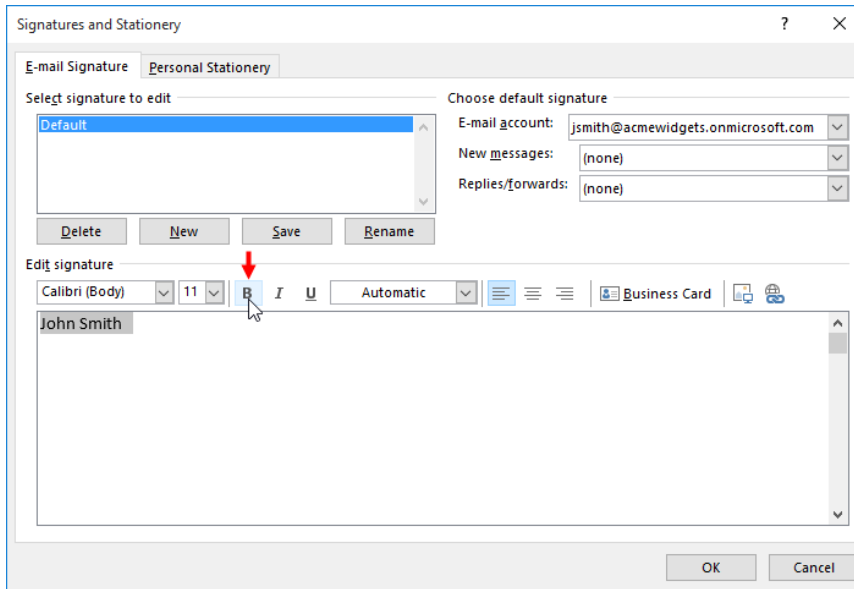
7. The New Signature dialog box will now be displayed. Type “Default” as the name for the new signature that you are creating and then click OK:



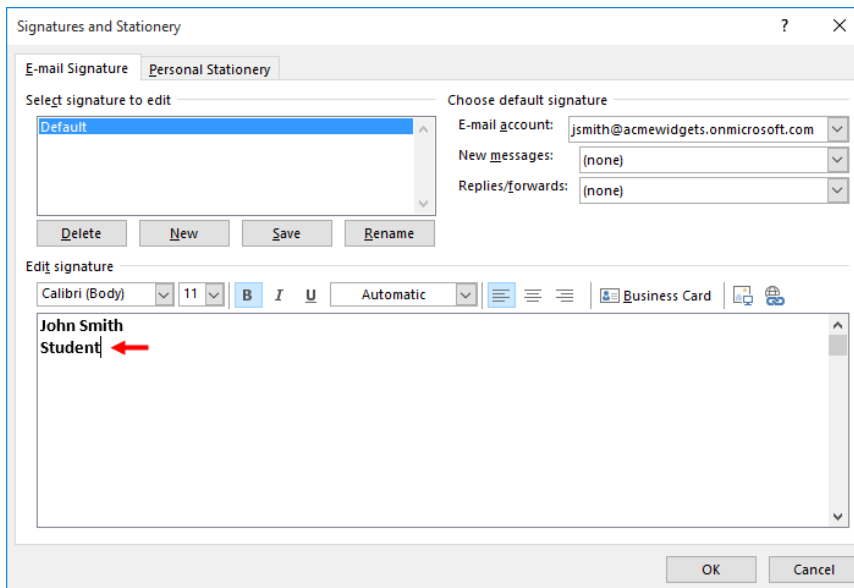
8. With a new signature created, you can begin customizing it using the controls in this dialog. Click inside the “Edit signature” text area and type your name:



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

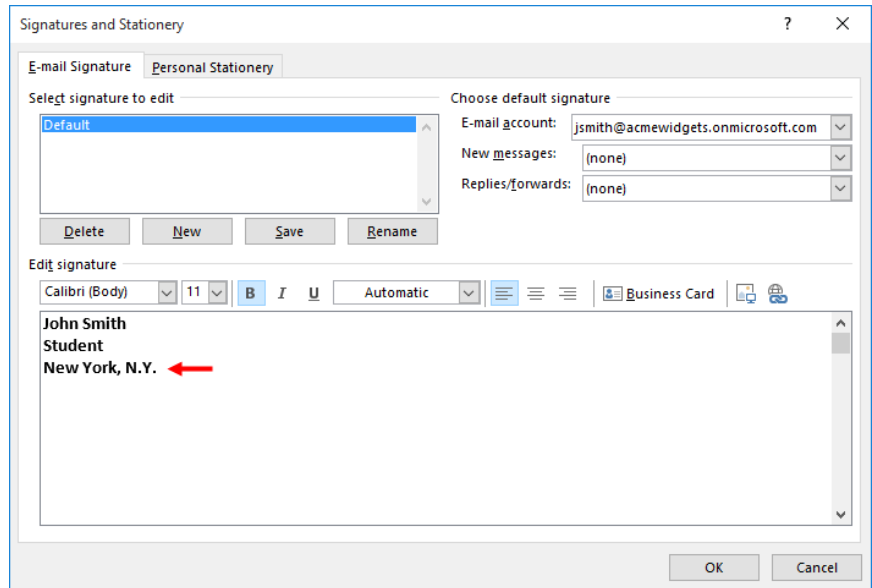


10. Click at the end of your name and press the Enter key on your keyboard to create a new line. Type your job title:

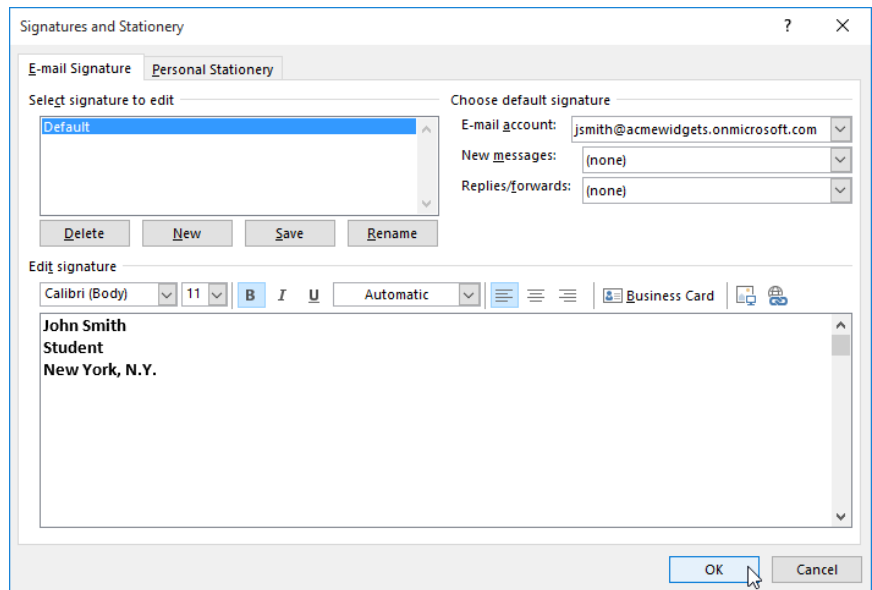


(If you don't have a job title, type "Student.")

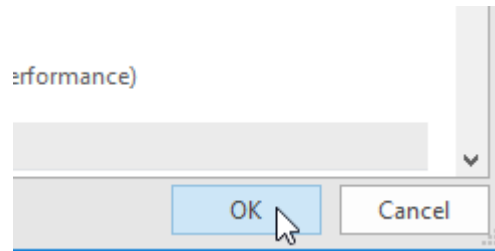
11. Press Enter to create a new line. Type your city and state/province:



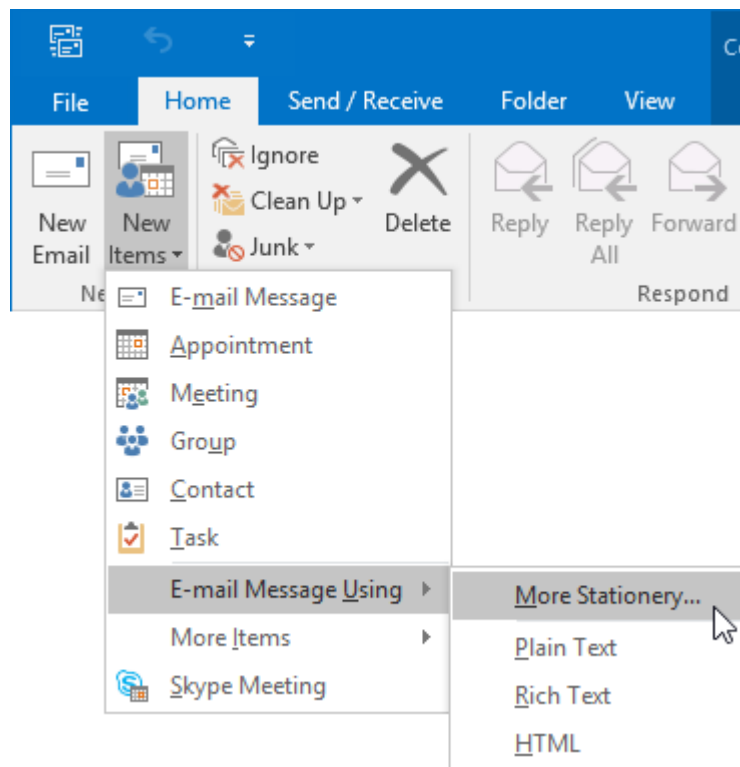
12. With the signature now complete, click the OK button in the lower right-hand corner of the dialog box:



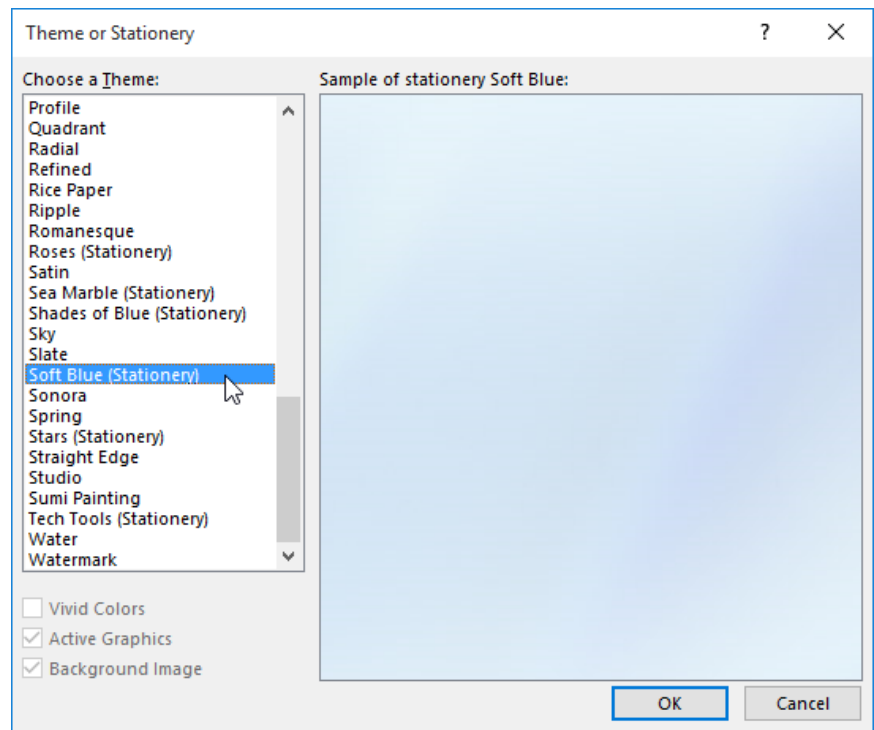
13. Back in the Outlook Options dialog box, click OK:



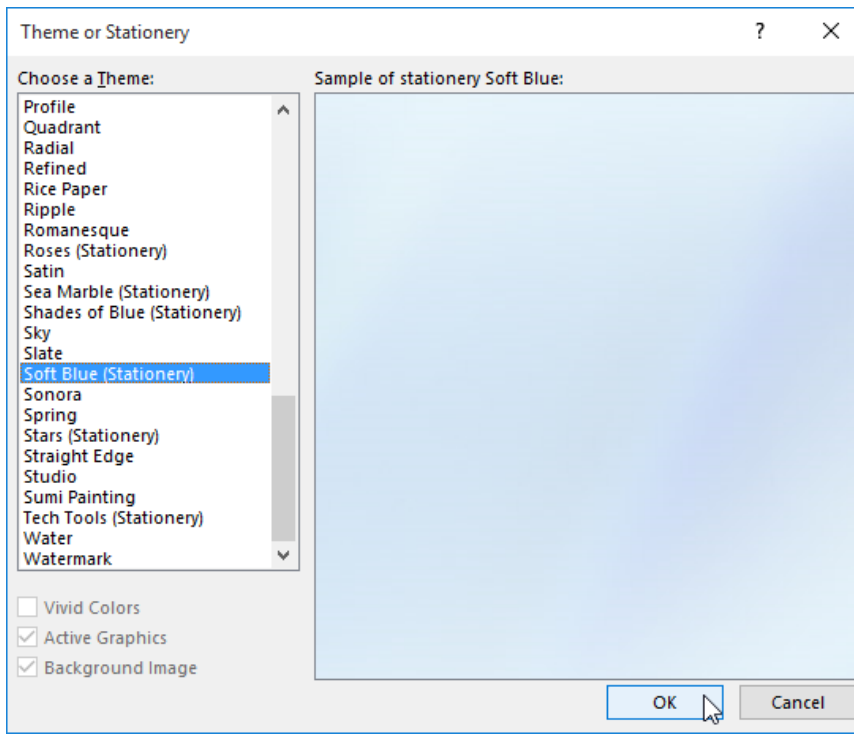
14. Now, you need to create a new e-mail to test out the signature that you just created. You would also like to see what kind of stationery templates are available. Back in the main Outlook 2016 window, click Home → New Items → E-mail Message Using → More Stationery:



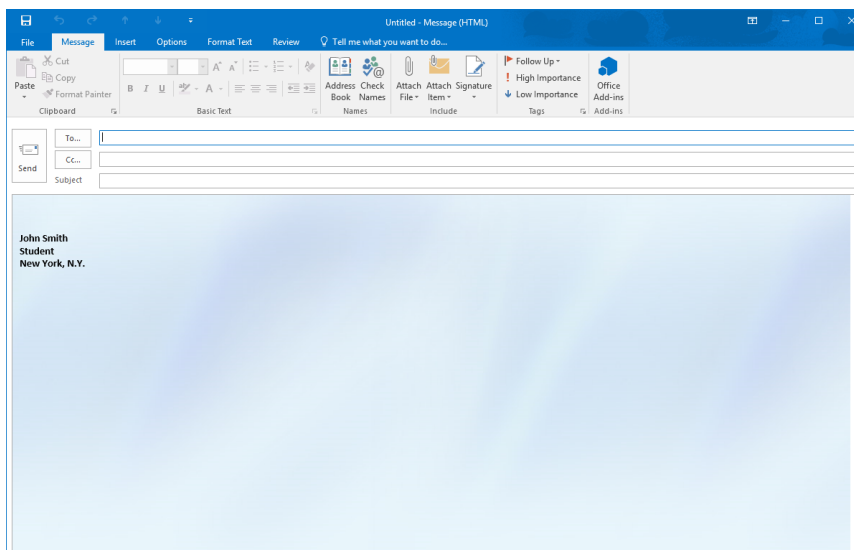
15. The Theme or Stationery dialog box will now be displayed. Scroll down in the list box on the left side of it and then click to select the Soft Blue (Stationery) option. You will see a preview of how this stationery template will look:



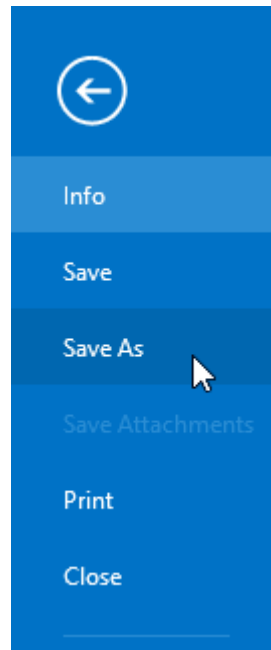
16. In the lower right-hand corner of the Theme or Stationery dialog box, click the OK button:



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



18. Click File → Save As:



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

Summary

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

REVIEW QUESTIONS

1. **What is the keyboard shortcut to launch the spelling and grammar checker?**
2. **What is the default message format that is used in Outlook 2016 by default?**
3. **What does the attachment reminder feature do?**
4. **What are Quick Parts?**
5. **What is the command sequence to configure signatures in Outlook 2016?**

LESSON 3: READING AND RESPONDING TO MESSAGES

Lesson Objectives

In this lesson you will learn how to:

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

TOPIC A: Customize Reading Options

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

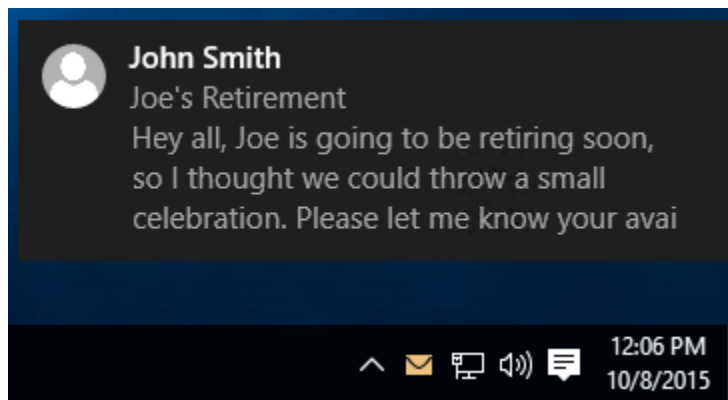
Topic Objectives

In this topic, you will learn:

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

DESKTOP ALERTS

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



If the desktop alert concerns an e-mail message, you will see who the sender is, the message subject line, and a few lines from the body of the

message. Clicking on the alert will display the message in a separate message window.

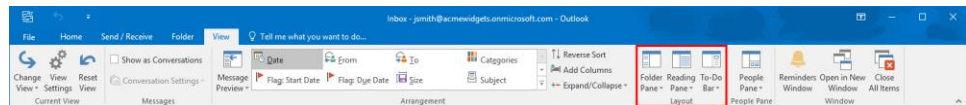
While desktop alerts are enabled by default, you do have the option to disable them. You can find this setting inside the “Message arrival” section of the Mail category in the Outlook Options dialog box.

Other Message Arrival Notifications

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

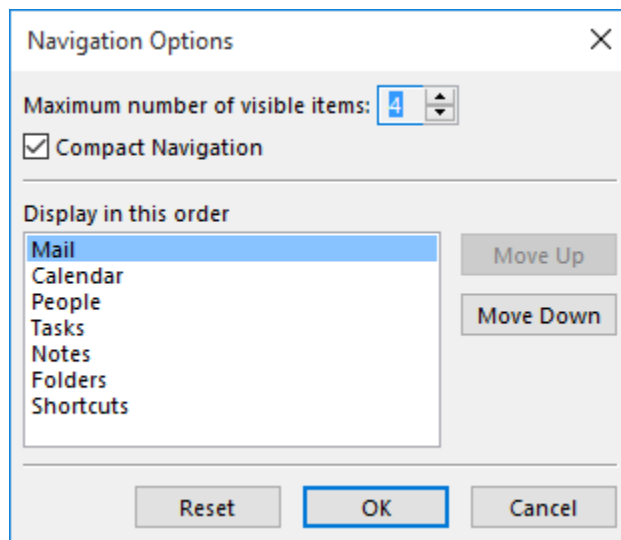
PANE VIEWS

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



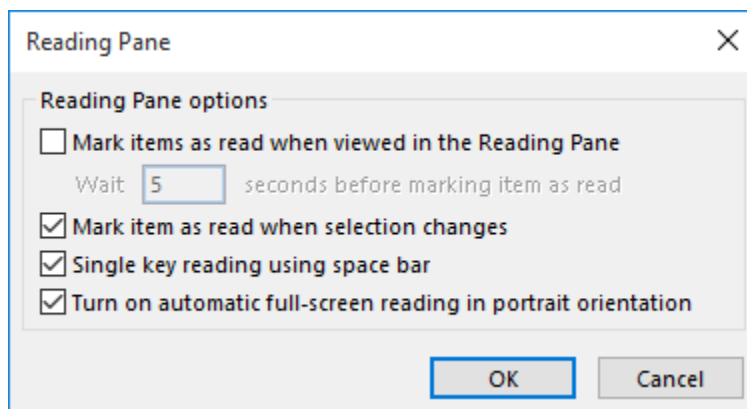
Using the **Folder Pane**, **Reading Pane**, and **To-Do Bar** drop-down commands, you are able to minimize those panes or remove them completely from the Outlook 2016 window. This has the effect of providing more space for the Reading pane and the main working area.

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



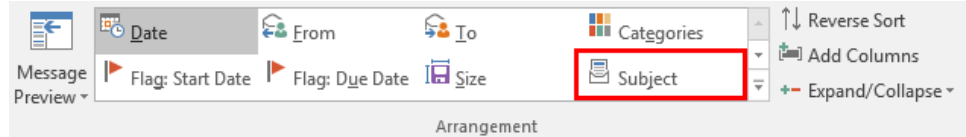
Using the controls in this dialog box, you are able to choose what buttons will populate the bottom of the Navigation pane. You can also toggle Compact Navigation (which will show icons instead of workspace names) on or off.

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

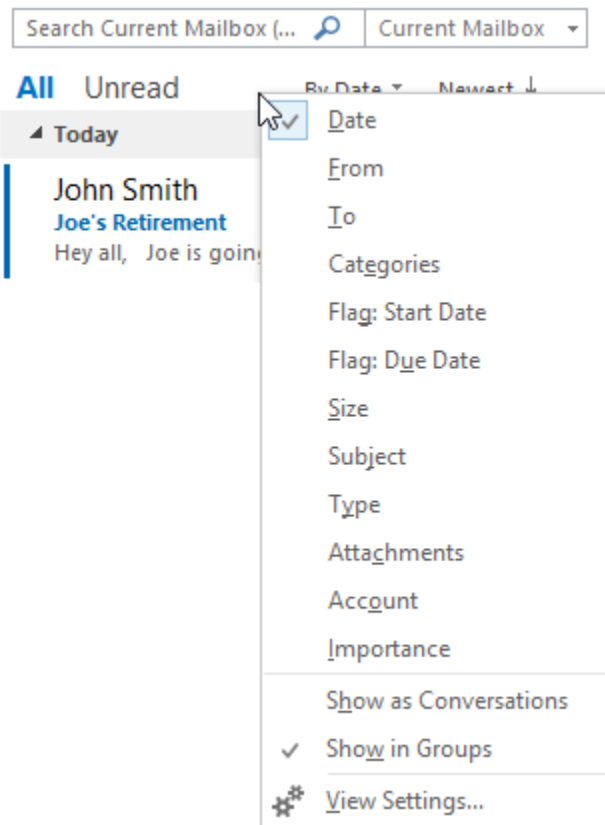


Using the controls in this dialog box, you are able to choose if items are marked as read when they are viewed in the Reading pane, and modify a few other settings.

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

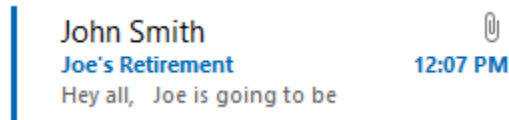


As well, you can customize the specific fields shown by right-clicking the column headers at the top of the workspace list:

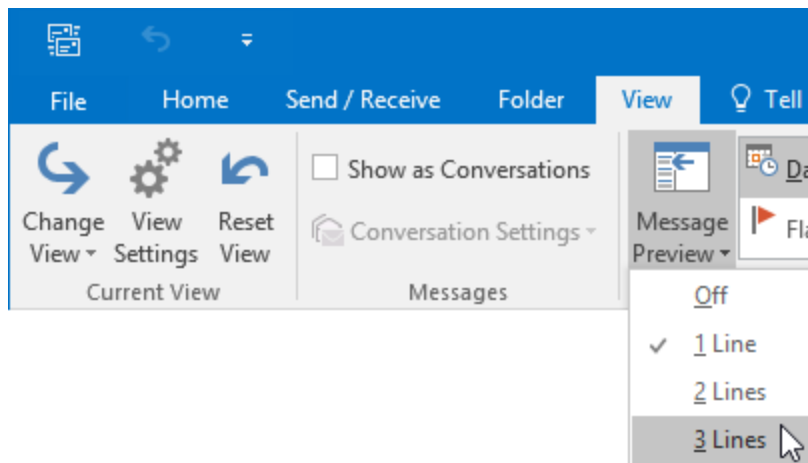


MESSAGE PREVIEW

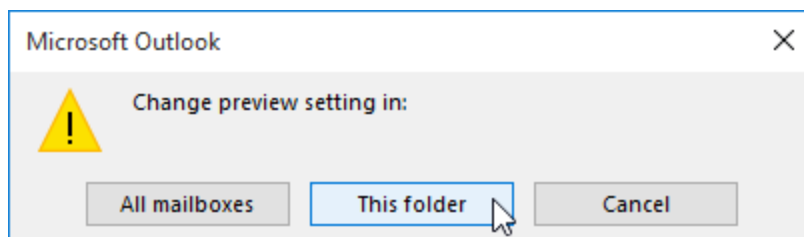
Message Preview is used to display the first few lines from a message, in the message list, just below the message's subject line. By default, this feature will display just one line:



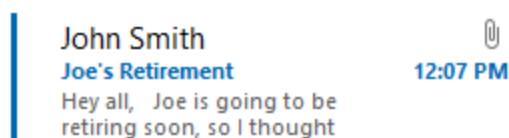
If you would like to display two or three lines instead, click View → Message Preview → [Line Count]:



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



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

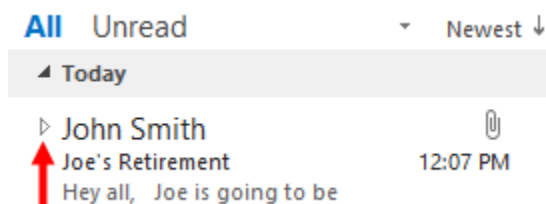


CONVERSATIONS

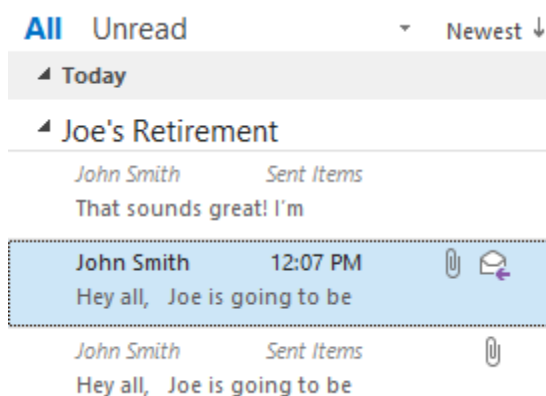
Conversations continue to be a way to organize messages in Outlook 2016. This feature groups all sent and received e-mails that share the same subject line. By grouping these messages together under the same subject line, you are able to follow a discussion in a more linear fashion as a thread.

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

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

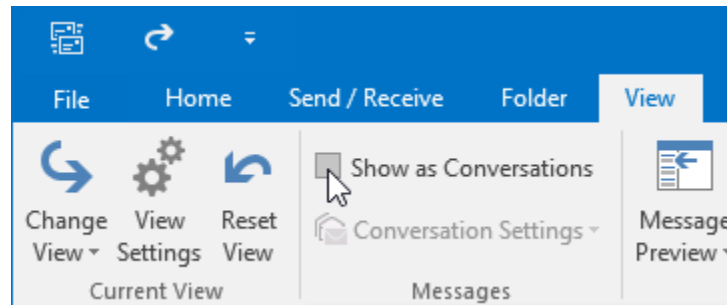


Clicking this arrow will expand or collapse the conversation. Here is an example of a conversation that has been expanded:

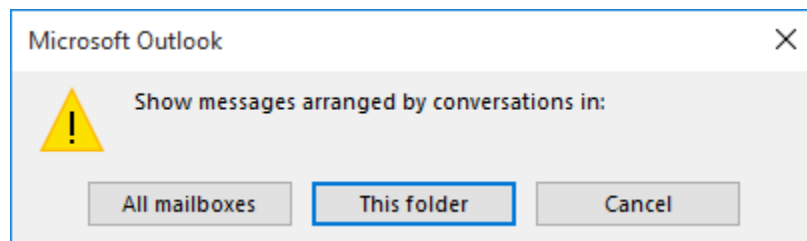


(Note that if an existing conversation receives a new message, the subject line will be bolded.)

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



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



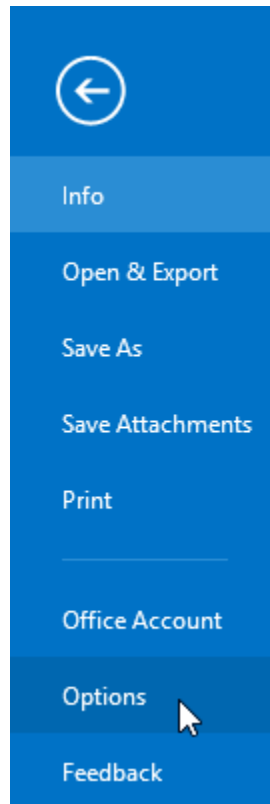
After clicking on one of these options, the Conversations feature will be enabled.

Split Conversations

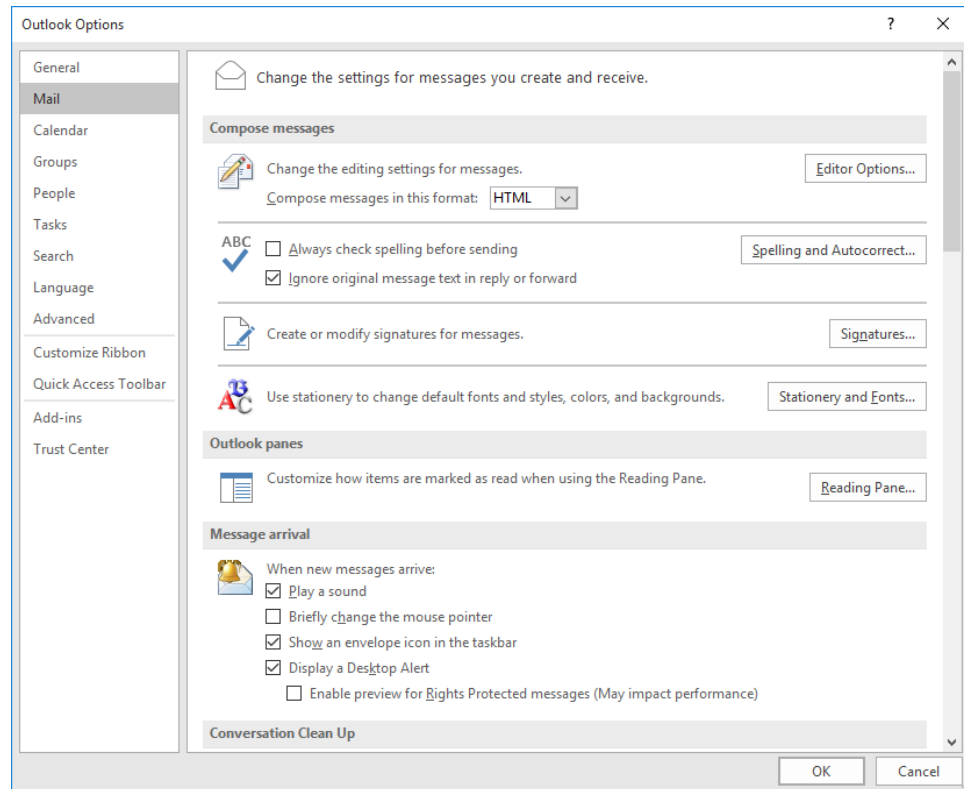
When a conversation contains more than one conversation thread, it is referred to as a **split conversation**. For example, if someone replies to the first message that initiated a conversation rather than replying to a more recent one, a split conversation will occur.

MAIL OPTIONS

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



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



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

- **Compose messages:** This section contains controls to modify the editing settings for a message (HTML, Rich Text, or Plain Text); configure how spelling and AutoCorrect tools operate; access signature options; and customize the stationery and fonts that are used for new messages.
- **Outlook panes:** This section contains just one button that is used to customize how the Reading pane operates.
- **Message arrival:** Here, you can modify what happens when a new message is received by Outlook.
- **Conversation Clean Up:** In this section you can control how the conversation clean up tool works. This includes controlling what type of messages are moved and choosing where cleaned up items are moved to.
- **Replies and forwards:** This section controls what kind of information is included when you choose to reply or forward a received message. By default, the original message will be included whenever you forward or reply to a message.

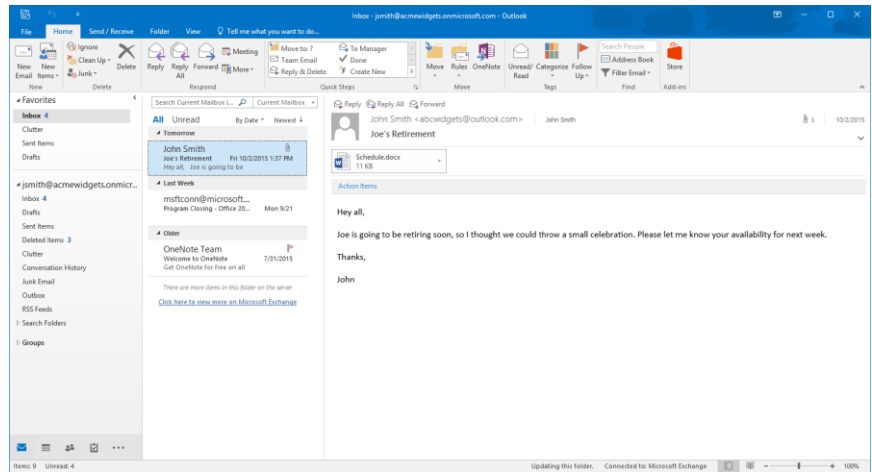
- **Save messages:** In this section you are able to control how and when a message is saved as you are composing it.
- **Send messages:** This section contains options to modify the default importance and sensitivity of any messages that you send, amongst many other similar settings.
- **MailTips:** In this section you will be able to control when and how MailTips are displayed.
- **Tracking:** In this section you will see controls that are used to configure how delivery and read receipts are handled.
- **Message format:** The settings in this section control the underlying formatting of a message.
- **Other:** The last section in the Mail category includes a mix of controls that are used to modify paste options, Next and Previous button display, and more.


ACTIVITY 3-1

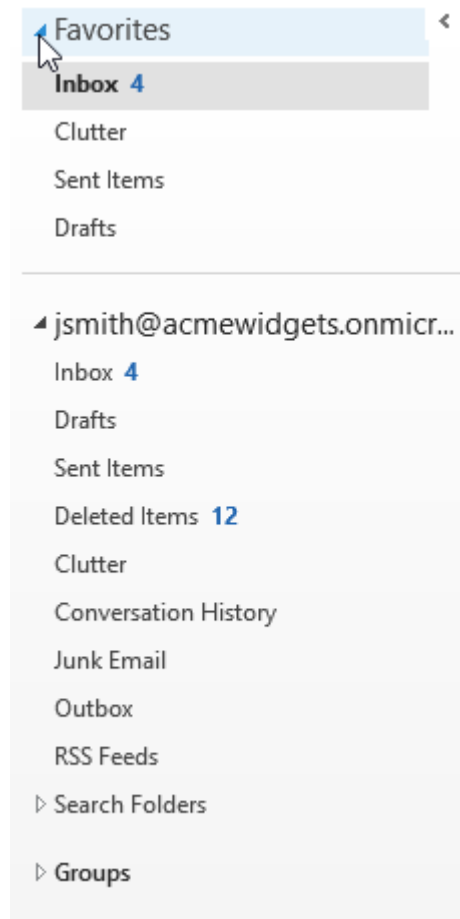
Customizing Reading Options

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

1. To begin, open Microsoft Outlook 2016:

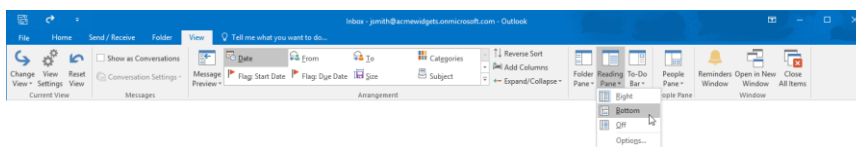


2. Hide the Favorites section in the Navigation pane by clicking the arrow () that appears next to the Favorites title:

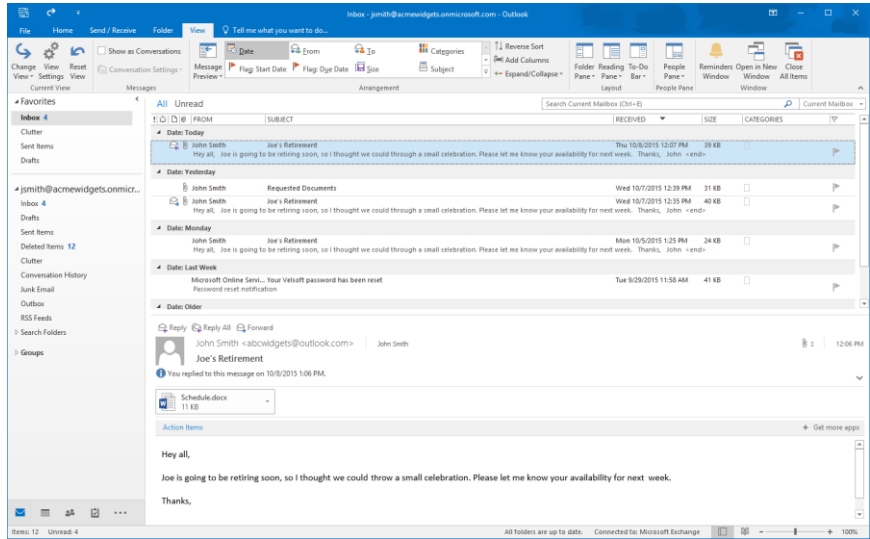


(If no Favorites are currently configured, skip to the next step.)

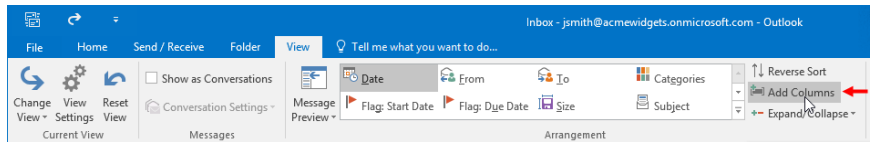
3. Adjust the Reading pane so that it appears below the message list by clicking View → Reading Pane → Bottom:



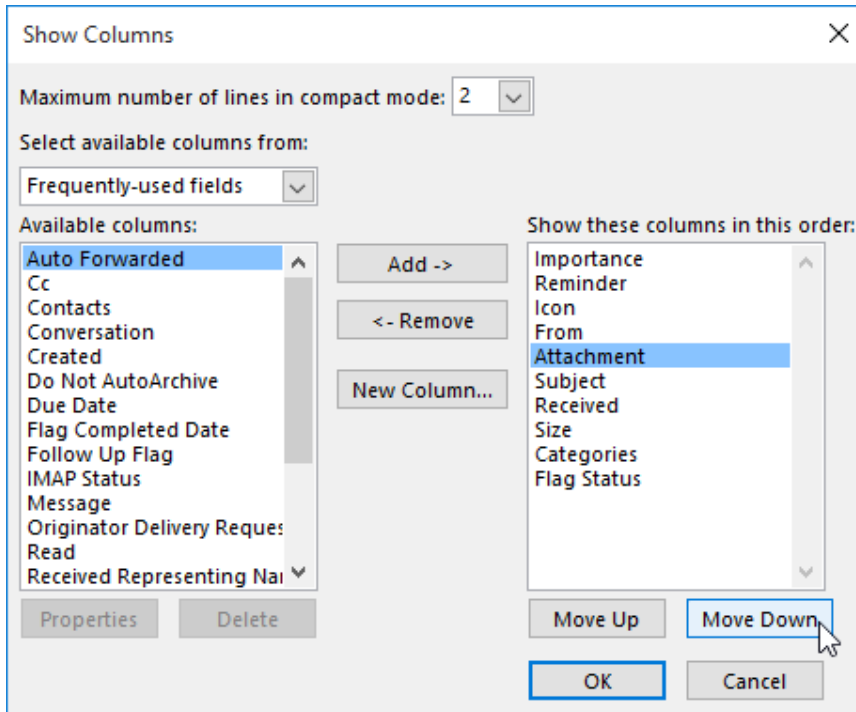
4. The Outlook 2016 window will now look like this:



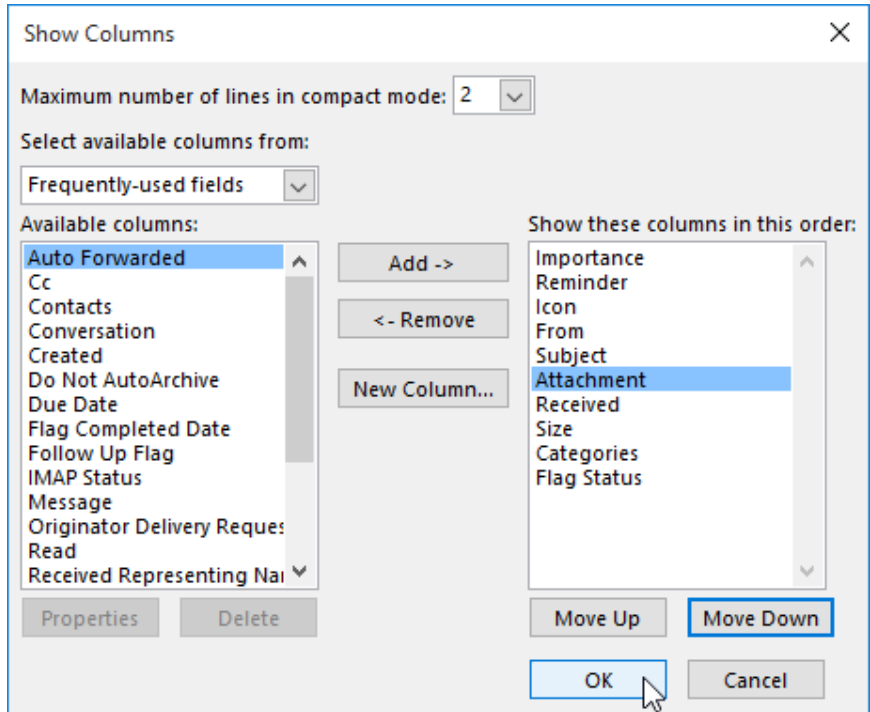
5. Now you would like to modify how columns are displayed in the current message list. Click View → Add Columns:



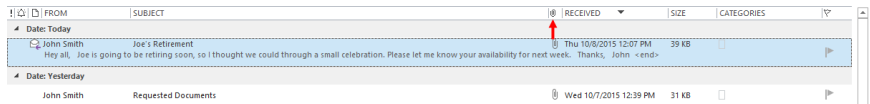
6. The Show Columns dialog box will now be displayed. In the list on the right-hand side of this dialog box, click Attachment and then click the Move Down button twice:



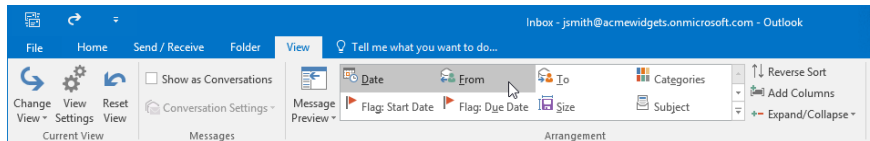
- 7. The Attachment column will now be after the Subject column, but before the Received column. Click OK to apply the new settings:



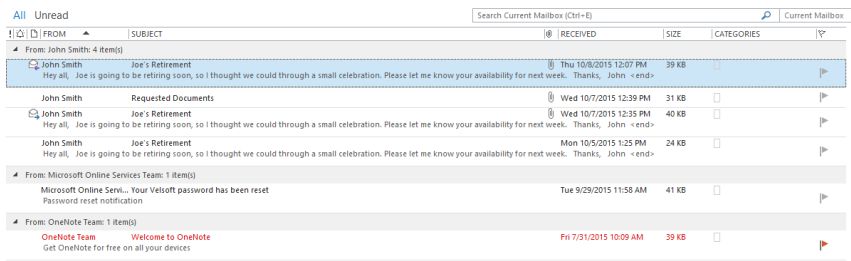
- 8. Examine the message list of the Outlook 2016 window. You will see the new column:



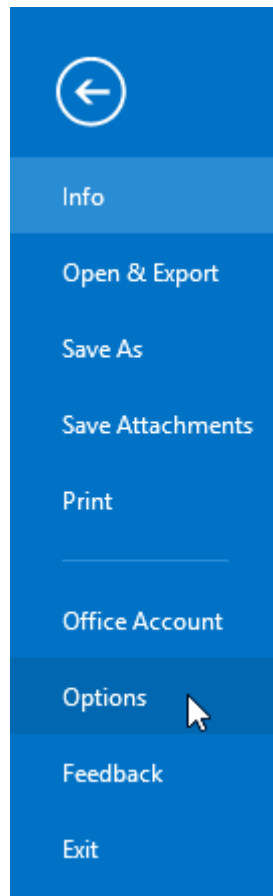
- 9. Next, you would like to arrange the items in the message list by the sender. Display the View tab. Within the Arrangement gallery, click the From option:



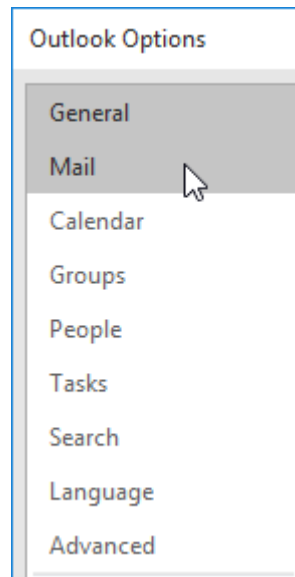
10. You will see the new arrangement now applied to the message list:



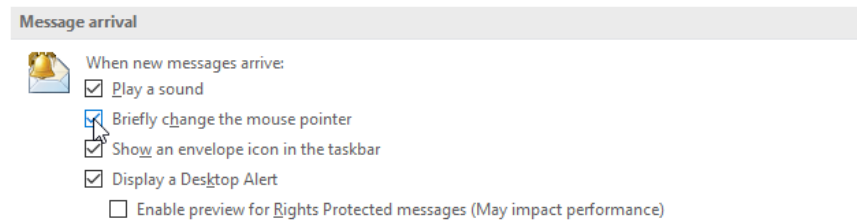
11. Finally, you would like to change the duration that desktop alerts are displayed for. Click File → Options:



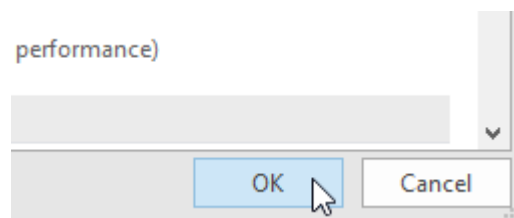
12. In the Outlook Options dialog box, click the Mail category:



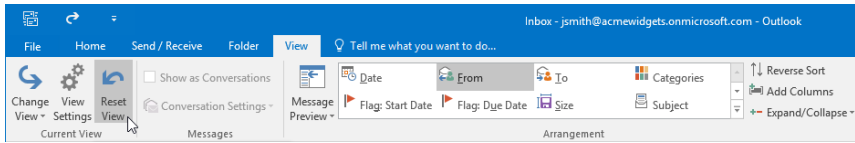
13. Within the “Message arrival” section, ensure that the first four options are checked:



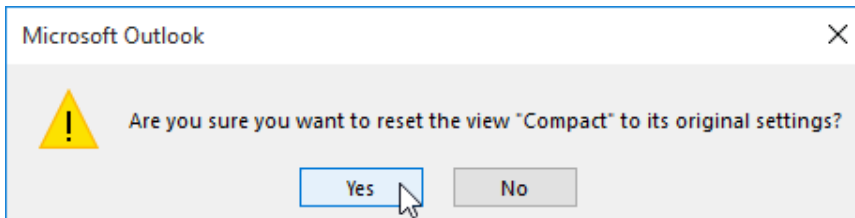
14. Click the OK button:



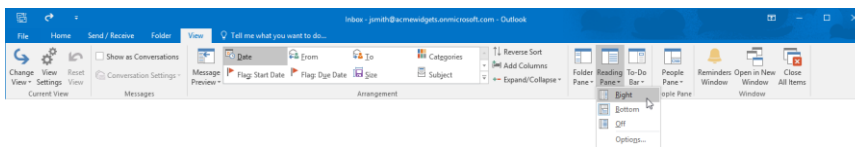
15. To restore the default view settings, click View → Reset View:



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



17. Next, click View → Reading Pane → Right:



18. Close Microsoft Outlook 2016.

TOPIC B: Work with Attachments

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

Topic Objectives

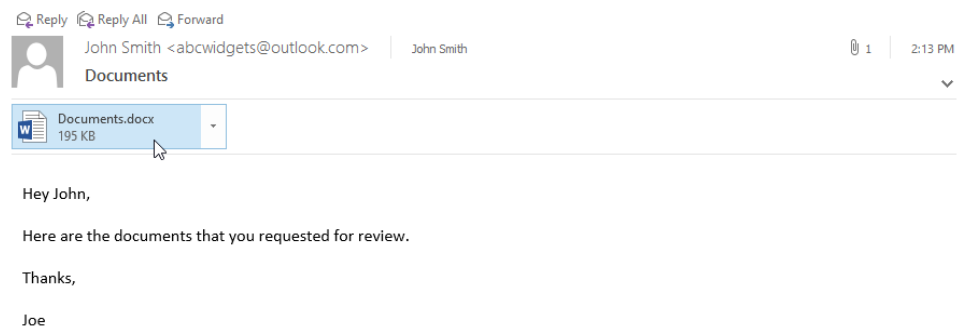
In this topic, you will learn:

- About attachment preview
- About printing attachments

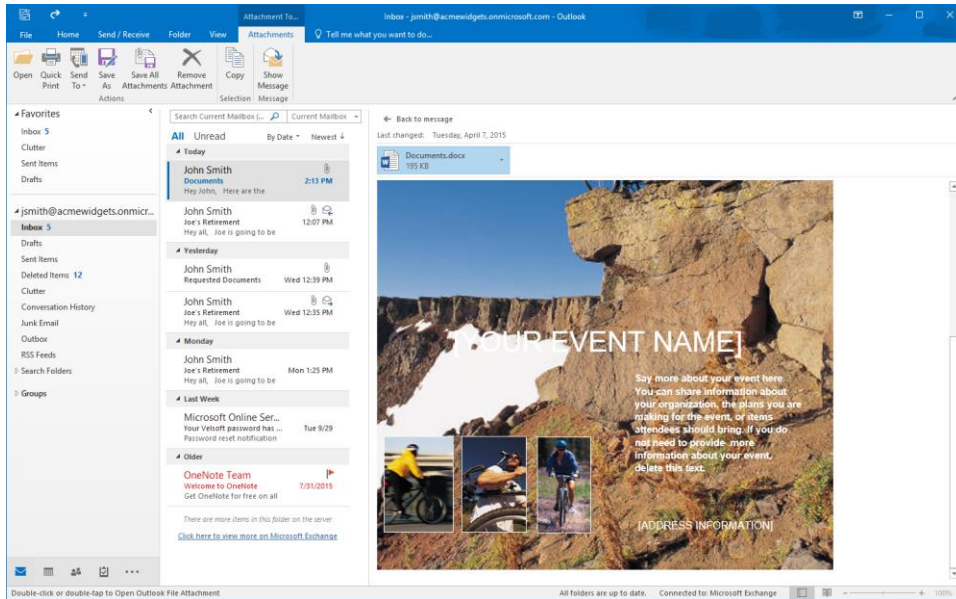
ATTACHMENT PREVIEW

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

To preview an attachment, click on the attachment listing:

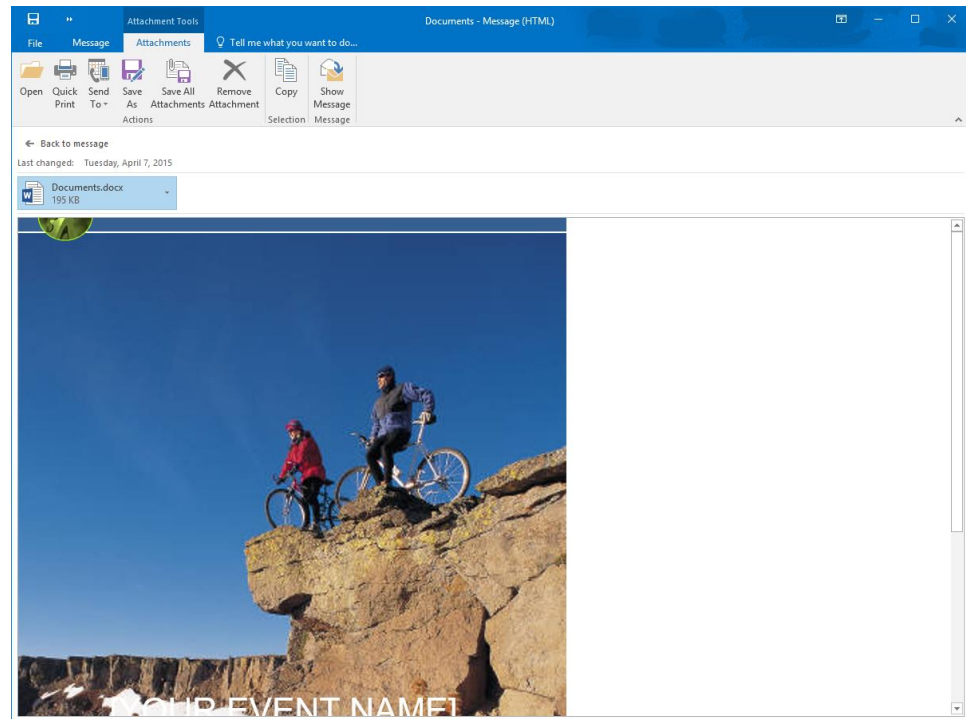


A preview of the attachment will then be displayed in the Reading pane (if you have the correct software installed) and the Attachment Tools – Attachments tab will be shown on the ribbon:

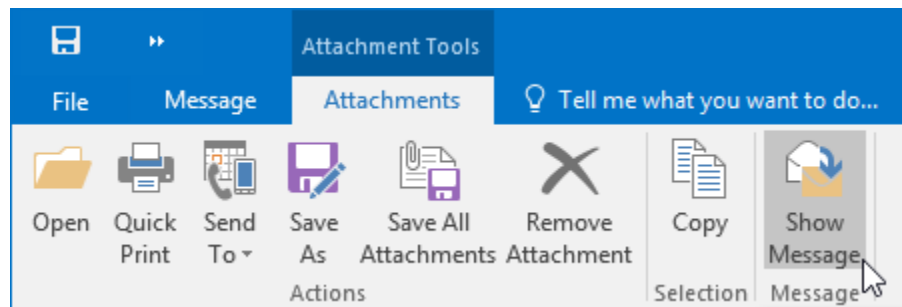


(Like regular attachments, you should only preview files that you trust.)

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






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



PRINTING ATTACHMENTS

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


 Reply  Reply All  Forward










John Smith <abcwidgets@outlook.com>

John Smith

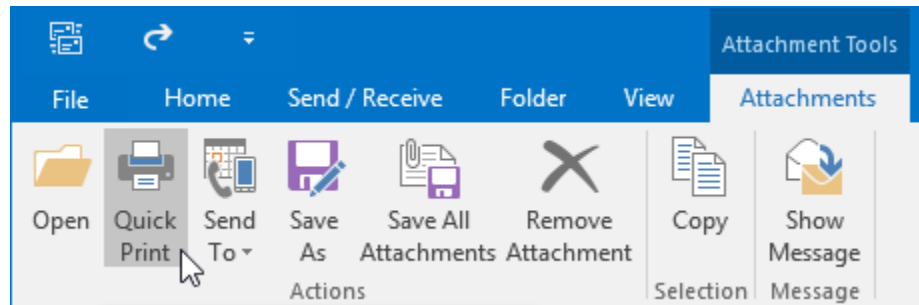
Documents

 Documents.docx
195 KB

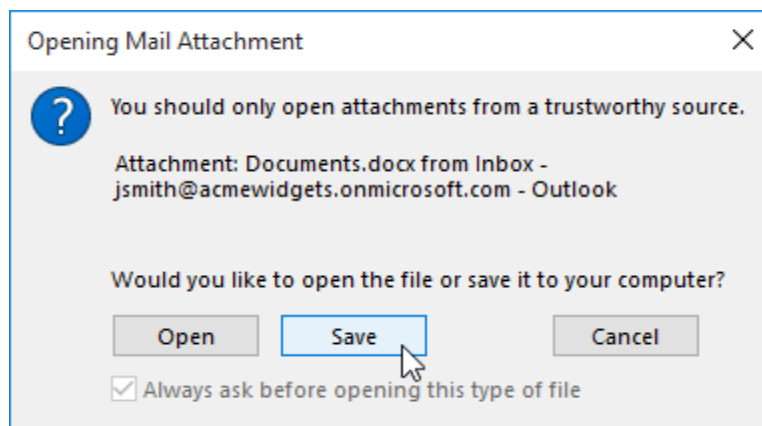
-  Preview
-  Open
-  Quick Print
-  Save As
-  Save All Attachments...
-  Remove Attachment
-  Copy

you requested for review.

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



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



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

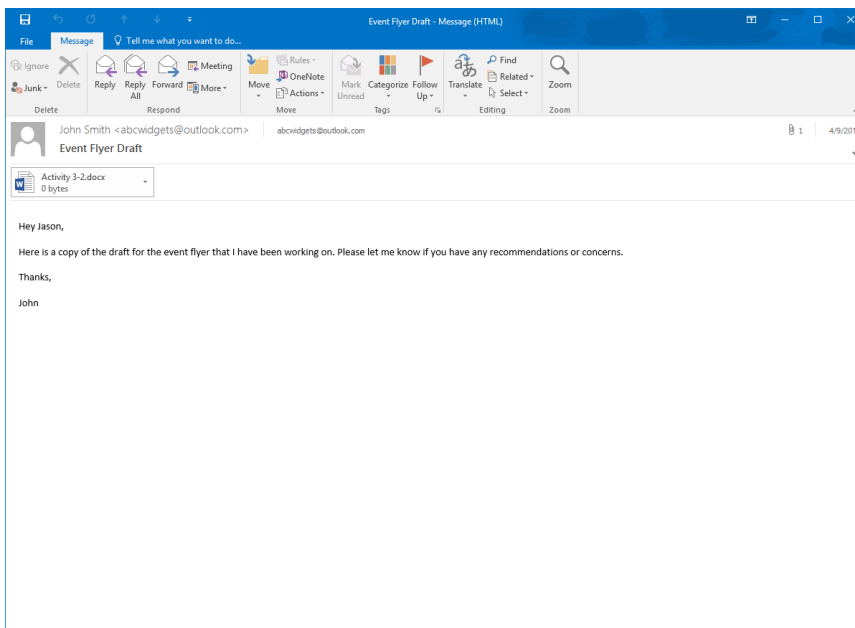
In either case, the attachment will then be printed to your default printer using the default printing settings.

ACTIVITY 3-2

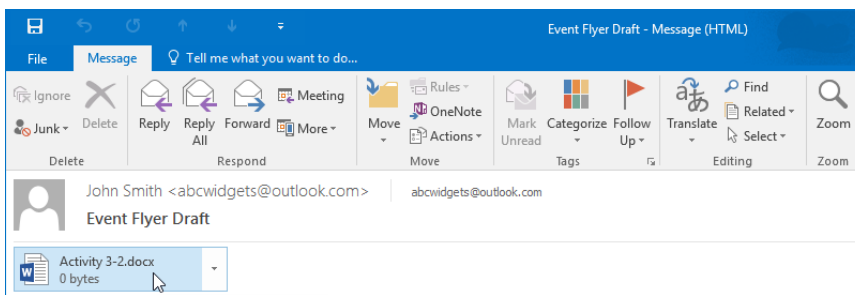
Working with Attachments

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

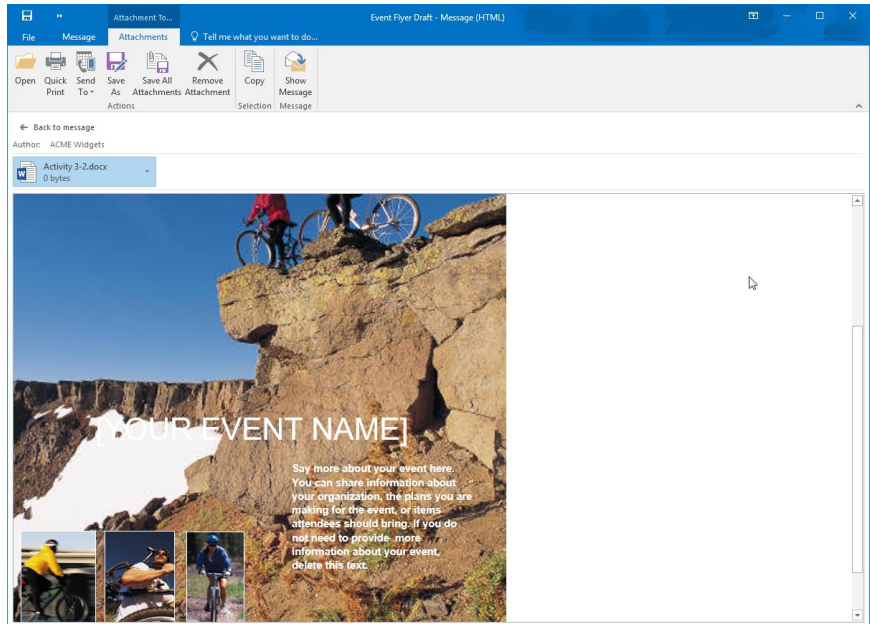
1. To begin, open Outlook 2016. Within your Exercise Files folder, double-click the Activity 3-2.msg file to open it. This message will be displayed in a separate Outlook window:



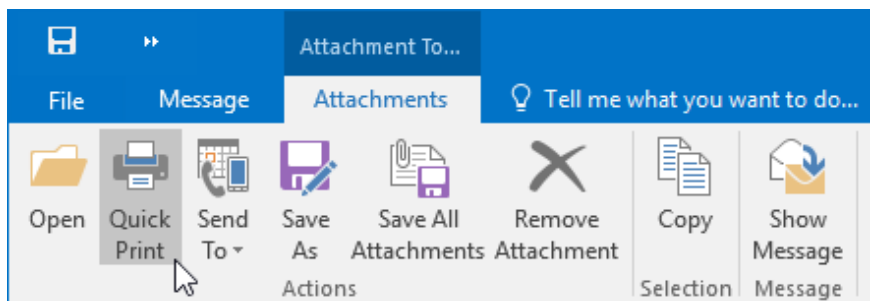
2. Just below the subject line, click on the listing for the attachment:



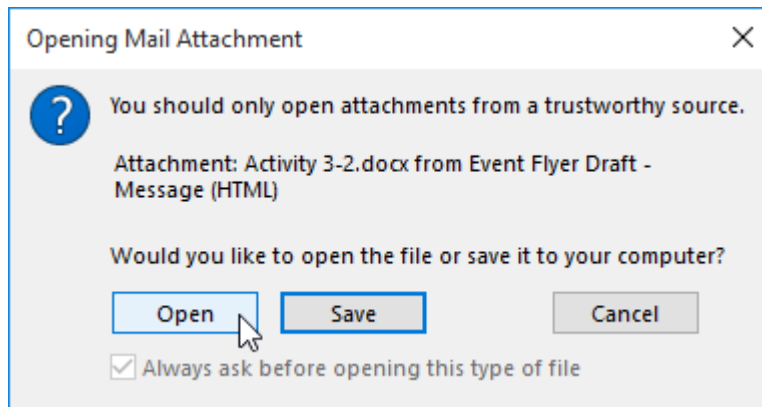
3. A preview of the file will now be displayed in the body of the Message window. Scroll through the preview to review it:



4. Click Attachment Tools – Attachments → Quick Print:



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



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

TOPIC C: Manage Your Message Responses

Outlook 2016 includes a variety of different features to help you manage responses that you receive from your messages. Over the course of this topic, you will learn about voting and tracking options, as well as how to resend and recall messages.

Topic Objectives

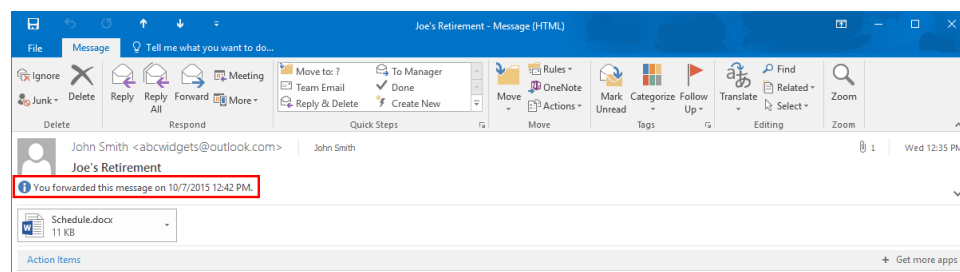
In this topic, you will learn:

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

THE INFOBAR

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

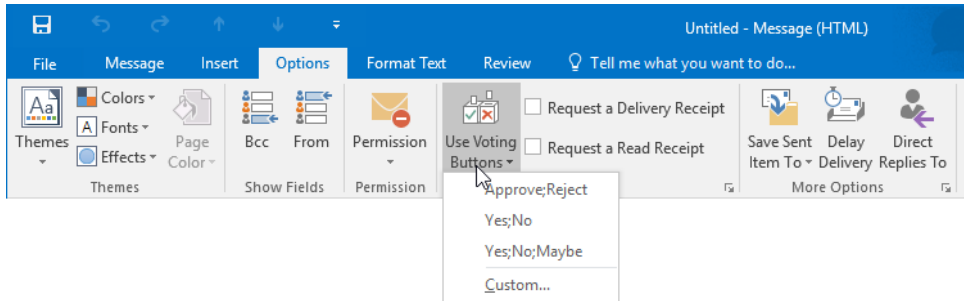
For example, if you are viewing a message, you might see the date and time that you replied to it or forwarded it to another person:



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

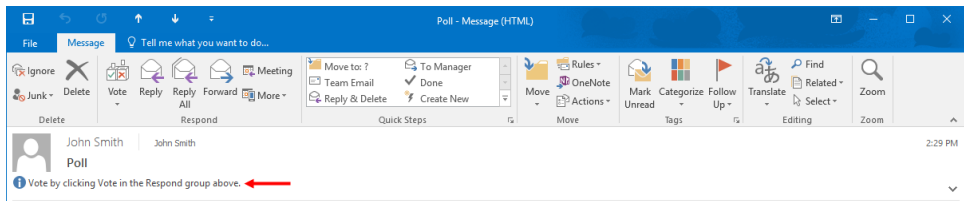
VOTING OPTIONS

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

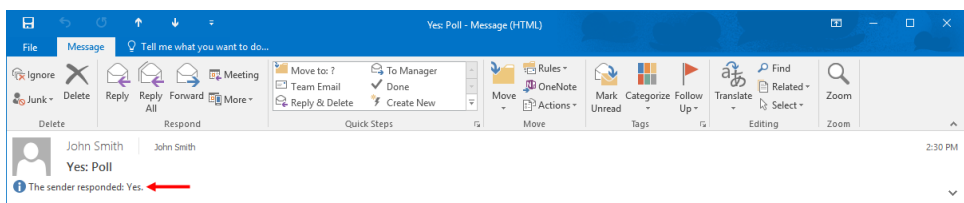


You can choose a few different default poll answers, including Approve;Reject, Yes;No, and Yes;No;Maybe. You can also choose to have your own custom responses if you wish by clicking the Custom option.

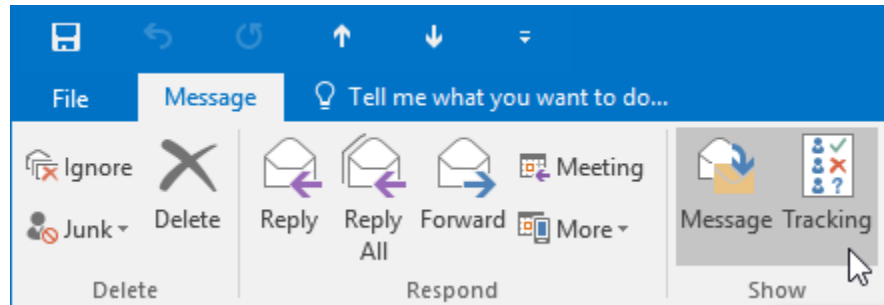
When a recipient receives a message that contains a poll, the InfoBar will display text that lets them know that they are to vote:



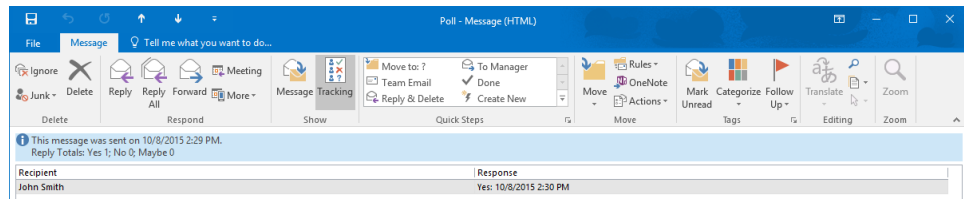
Responses to the poll will be sent to the sender, who can see the response in the InfoBar for the received message:



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



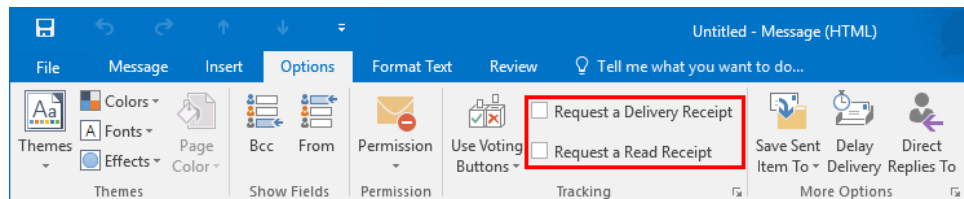
This action will show the results in the InfoBar of this message, along with detailed results in the main Message window:



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

TRACKING OPTIONS

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



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

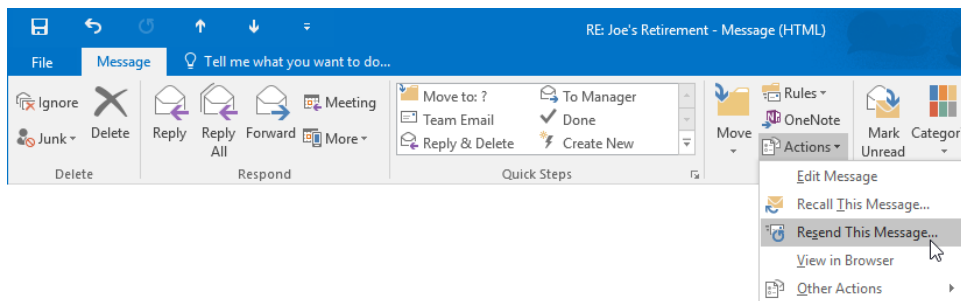
Both of these options are great to help you make sure that your recipient(s) actually receive and read your message; however, keep in

mind that the recipient has some control over how this works. The recipient will know when you enable read receipts and if they wish, they can choose whether or not to send a confirmation notification, or to ignore the request entirely.

THE RESEND OPTION

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

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

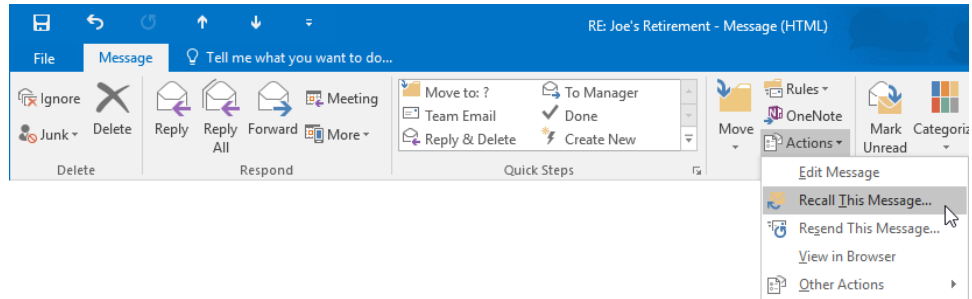


The contents of the original message (including the subject, message body, and any attachments) will then be transferred to a new Message window. From there you can then resend this message as required.

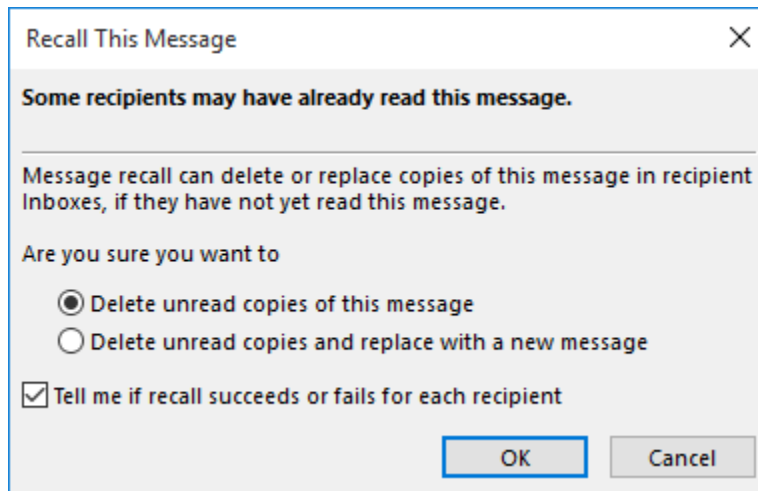
THE RECALL OPTION

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

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



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



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

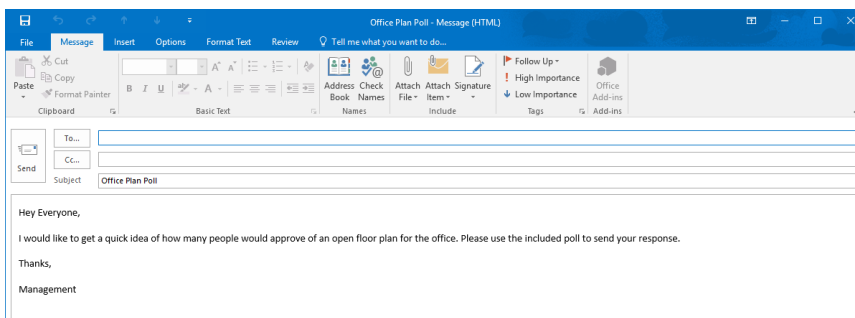
ACTIVITY 3-3

Managing Your Message Responses

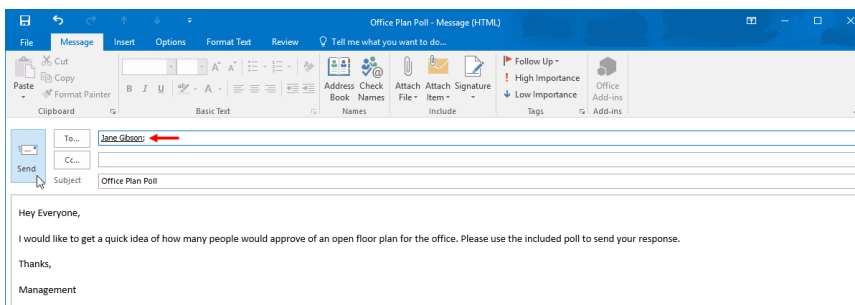
You need to send a poll to your colleagues that will ask them if they approve of a new open floor plan for the office. Unfortunately, you sent this e-mail without actually including the poll.

Students should pair up with another classmate for this activity. Both participants must have a Microsoft Exchange Server or Office 365 e-mail account in order to complete the first half of this activity.

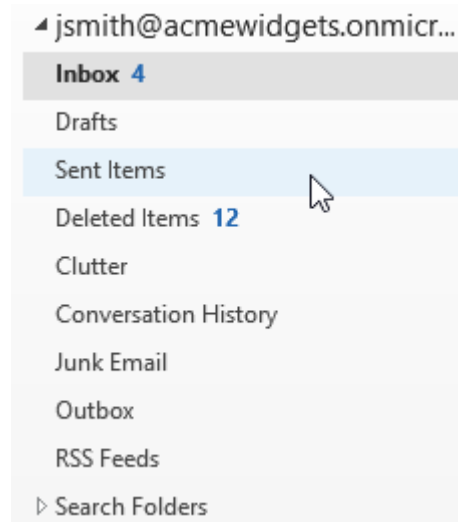
1. To begin, open Outlook 2016. Within your Exercise Files folder, double-click the Activity 3-3.msg file to open it. This message will be displayed in a separate Outlook window:



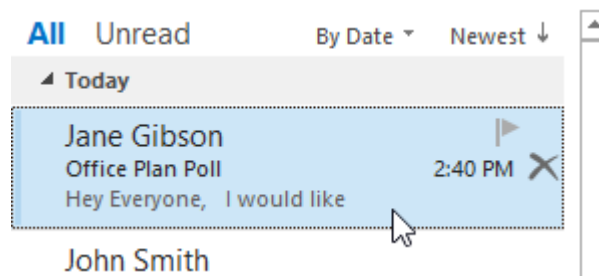
2. Enter the e-mail address of your partner into the To field and then click Send:



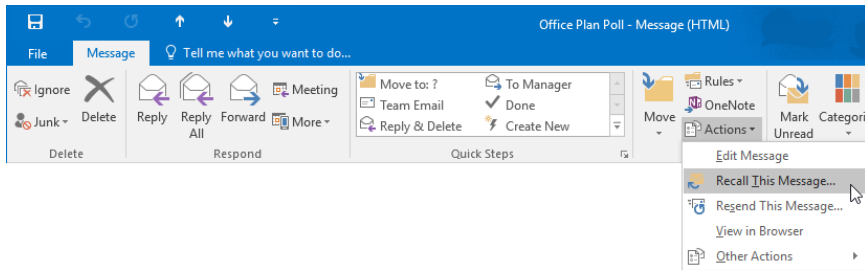
3. With the e-mail now sent, you realize that you forgot to add the poll. To retract this message, click the Sent Items folder in the Navigation pane:



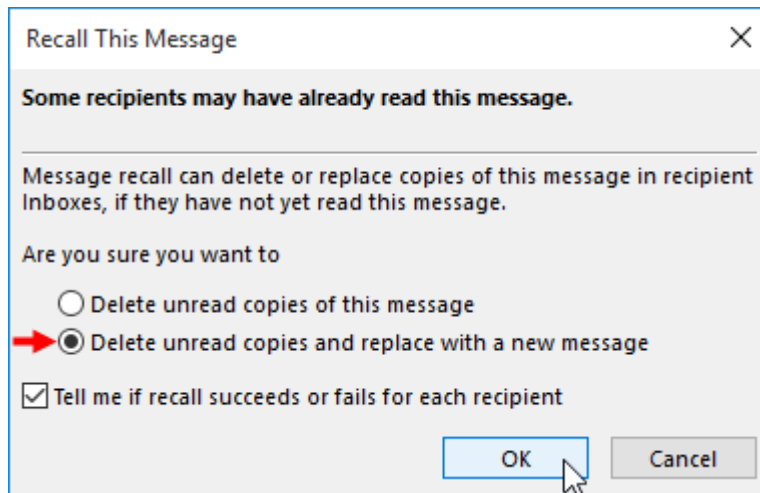
4. At the top of the message list, you will see an entry for the message that you just sent. Double-click on this entry to open it in the Message window:



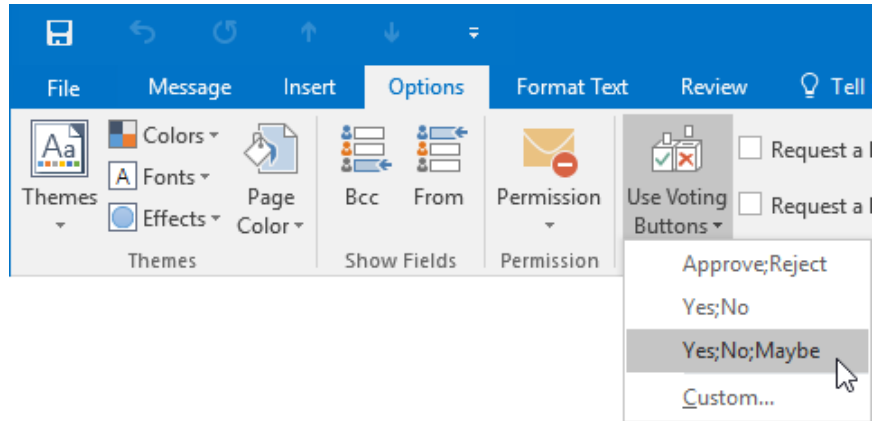
5. With the erroneously sent message now open in the Message window, click Message → Actions → Recall This Message:



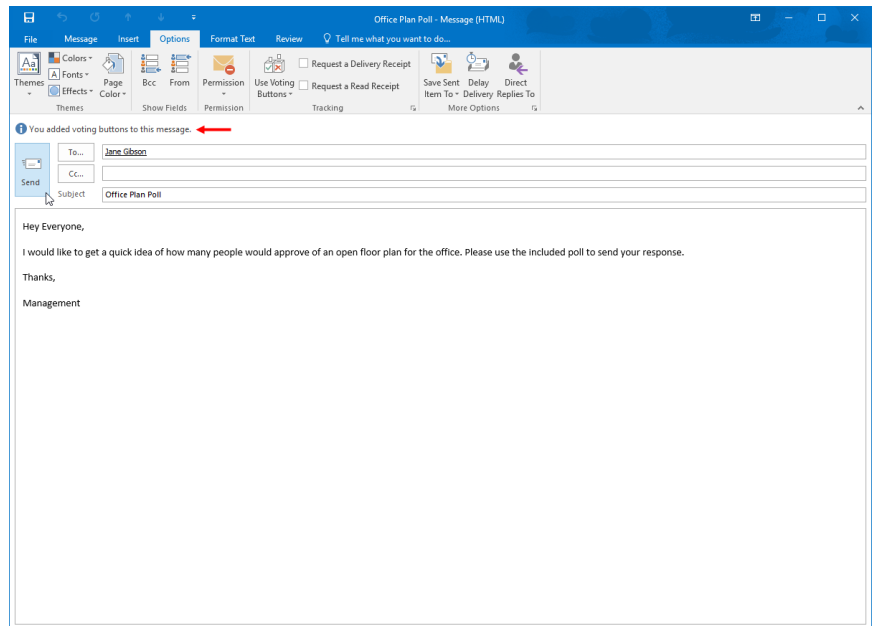
6. The Recall This Message dialog box will now be displayed. Click the “Delete unread copies and replace with a new message” radio button and then click OK:



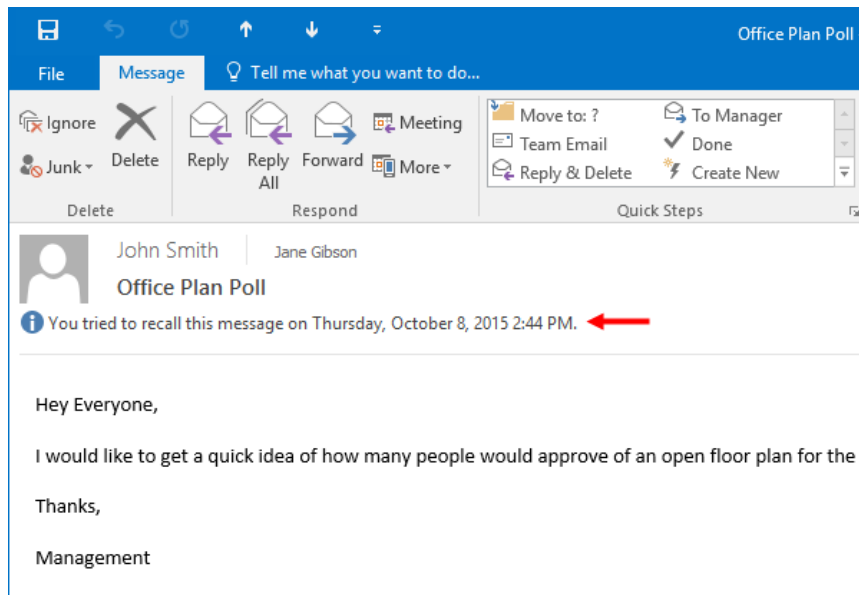
7. A new Message window will appear with the content from the original message. This is the message that you will use to replace the unread copy. Add the poll by clicking Options → Use Voting Buttons → Yes;No;Maybe:



8. You will see in the InfoBar that the poll has now been added to the message. Click the Send button:



9. The original message will now be shown. The InfoBar will state that you attempted to recall this message at a specified time:



10. Close this message window. Close Microsoft Outlook 2016.

Summary

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

REVIEW QUESTIONS

1. What happens if you click a desktop alert?
2. How many lines does the Message Preview feature show by default?

3. **Are conversations enabled by default?**
4. **How do you preview a file attachment?**
5. **What does the Resend command do?**

LESSON 4: MANAGING YOUR MESSAGES

Lesson Objectives

In this lesson you will learn how to:

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

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

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

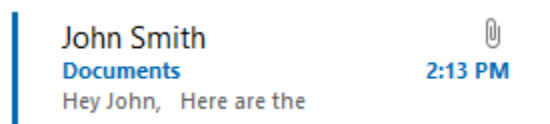
Topic Objectives

In this topic, you will learn:

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

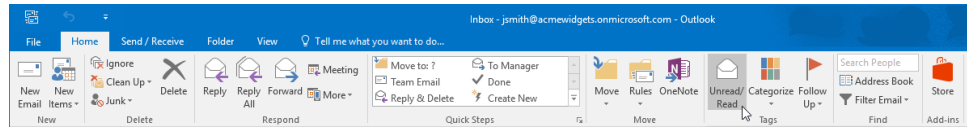
MARKING MESSAGES AS UNREAD/READ

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



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

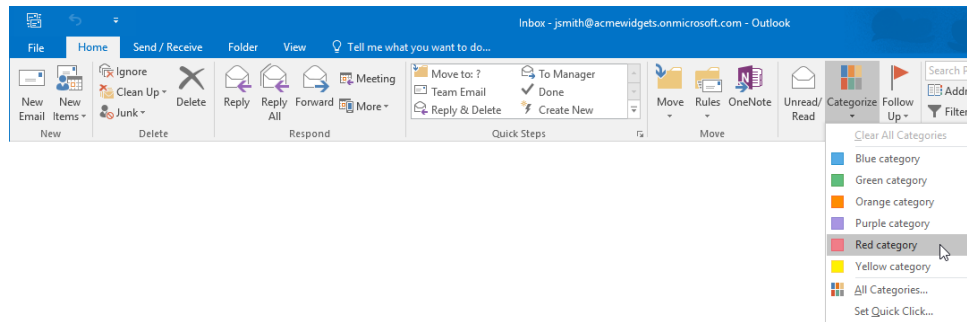
To do this, click to select the message from the working area and then click Home → Unread/Read:



COLOR CATEGORIES

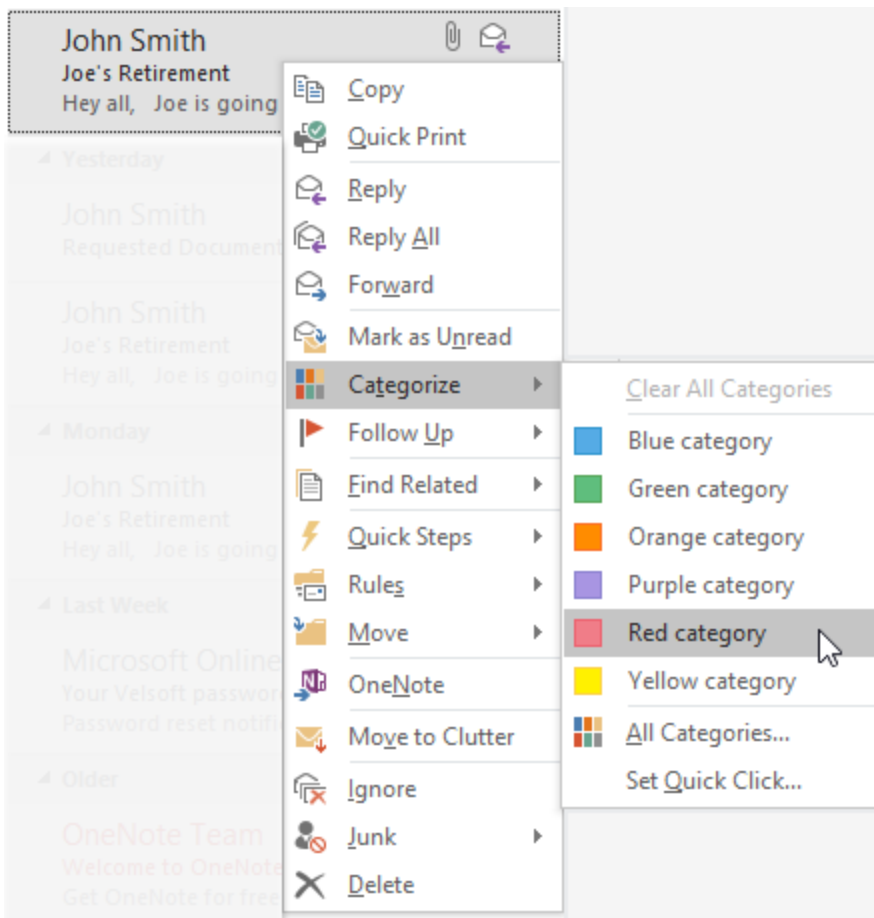
To further organize your messages, you can assign them colored categories. These are completely customizable in that you can give them any title that you like. For example, you could color categorize any messages from your manager using a red category that you have labeled “Manager.”

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

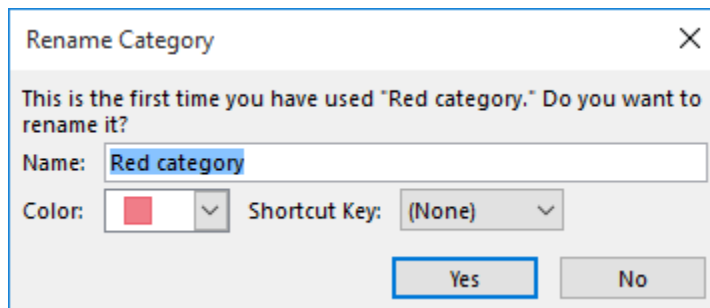


The Clear All Categories option in this menu will remove all categories from the item. To clear a single category, click Categorize and click the category to remove from the item.

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



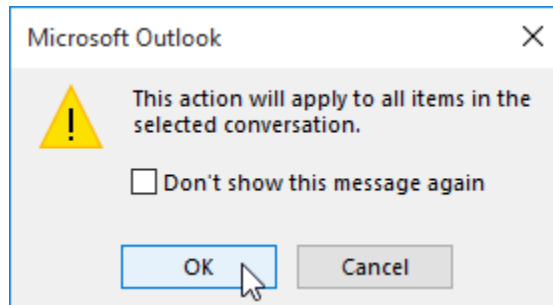
If it is the first time that you are using a category, the Rename Category dialog box will open and prompt you to rename it. Additionally, you are given the option to apply a shortcut key if you wish:



Color Categories and Conversations

A color category that is applied to any top-level message will also be applied to other messages within the same conversation. Outlook will

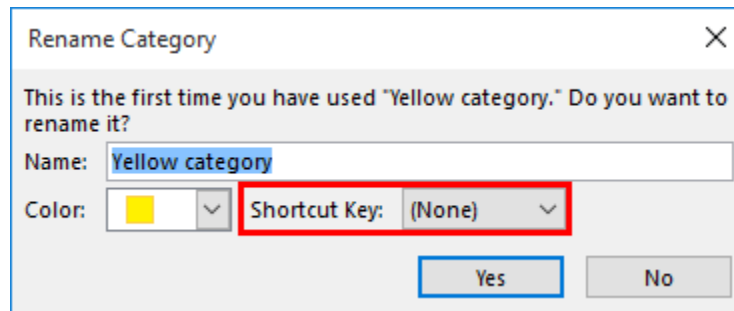
display a dialog box that indicates this fact when you apply a color category to a conversation item:



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

Shortcut Keys

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

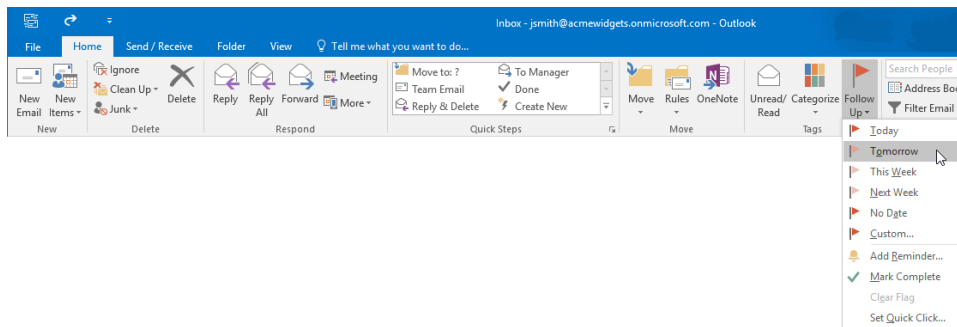


This shortcut key will allow you to apply an associated category to the selected Outlook item with just a few keystrokes.

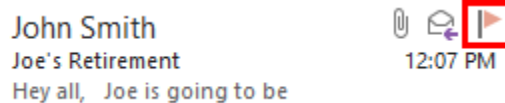
FLAGGING MESSAGES FOR FOLLOW-UP

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

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



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



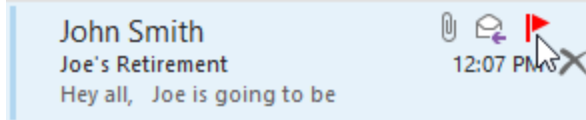
FOLLOW-UP FLAG OPTIONS

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

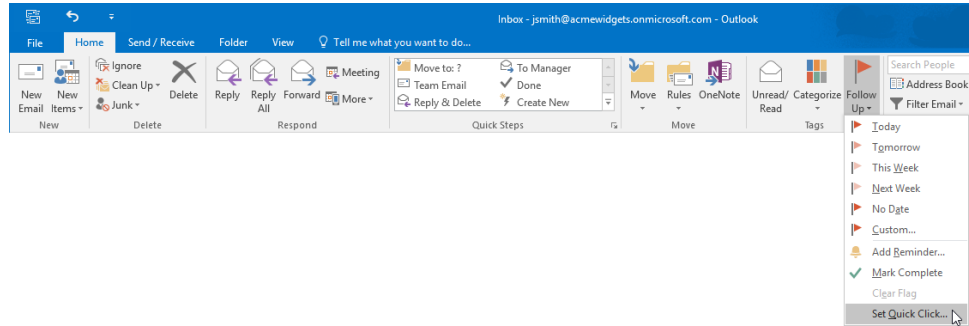
- **First Five Options:** Set the date for the follow-up.
- **Custom:** Opens a dialog to set the type of flag, start time, due date, and reminder. Also has an option to clear an existing flag.
- **Add Reminder:** Add a reminder to this flag.
- **Mark Complete:** Change the flag to a checkmark to indicate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

Set Quick Click for Flags

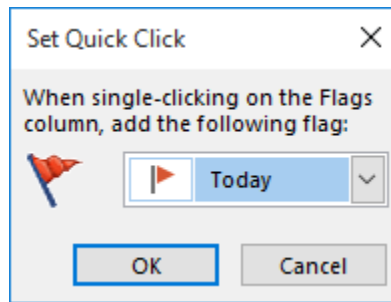
If you find yourself using the same flag type over and over again, you can assign it as a Quick Click for flags. Doing this allows you to apply this flag by clicking the flag icon that appears inside the listing for an Outlook item:



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

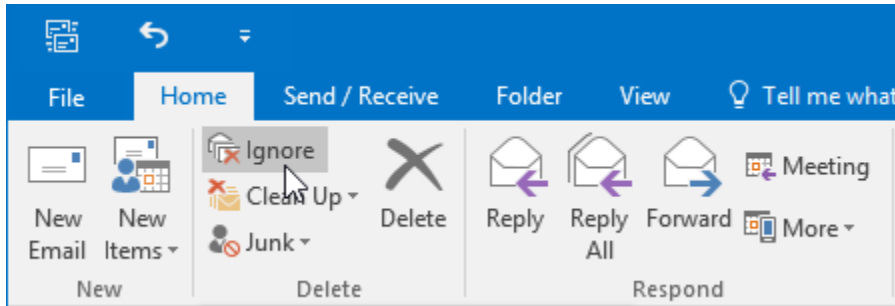


This action will display the Set Quick Click dialog box. Using the drop-down menu, you can then choose the flag that you would like to assign as the Quick Click flag. Click OK to apply any new settings:



THE IGNORE CONVERSATION COMMAND

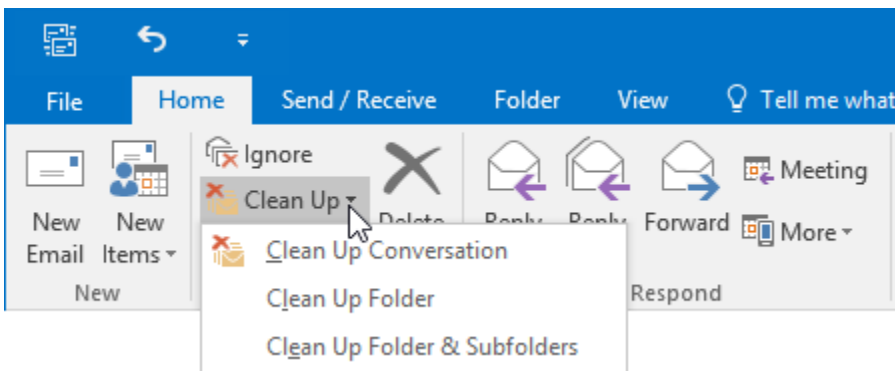
Occasionally, you may find yourself part of a long and ongoing conversation that you do not have much stake in. Such a situation can clutter your mailbox and distract you with notifications. By selecting that conversation and then clicking Home → Ignore, you will be able to ignore any new messages that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



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

CLEAN UP COMMANDS

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



Here is an overview of the commands in this menu.

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

ACTIVITY 4-1

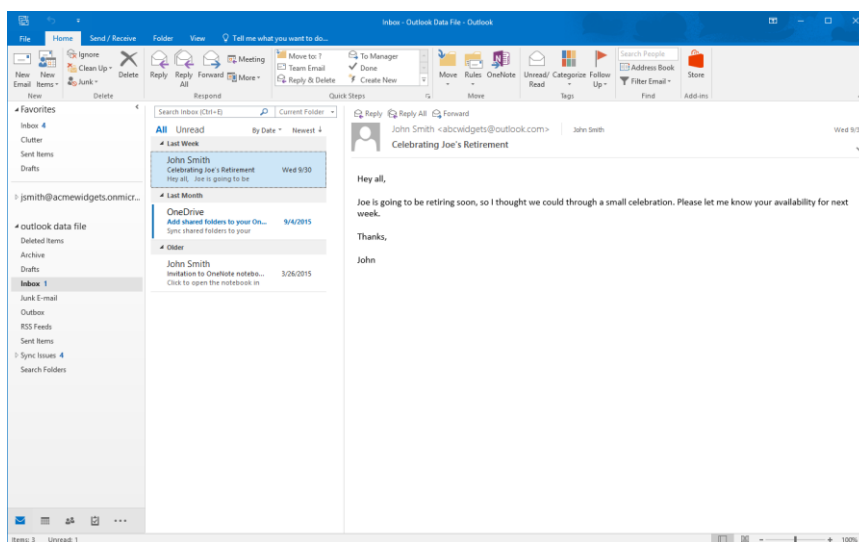
Managing Messages Using Tags, Flags and Other Commands

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

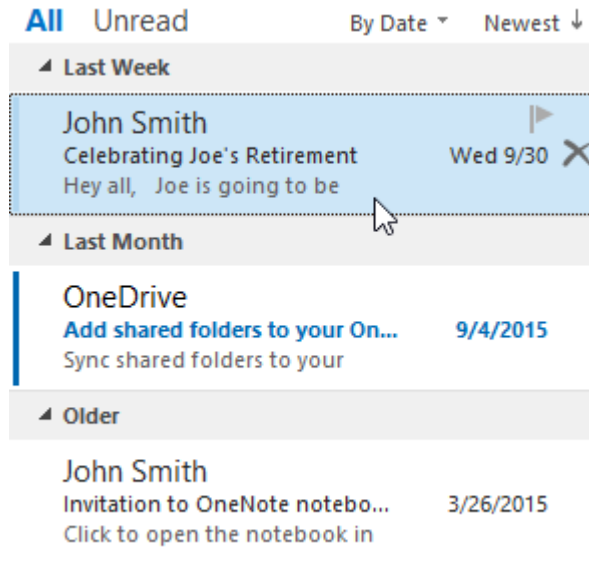
Before students begin, please have them follow these steps to open the Lesson 4.pst file in their Exercise Files.

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

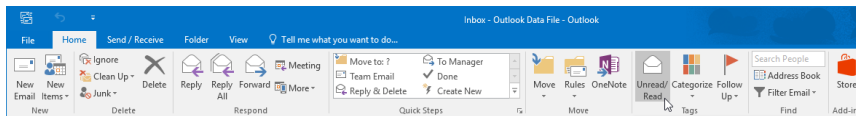
1. To begin, open Outlook 2016. Ensure that the Inbox for the Outlook Data File is displayed:



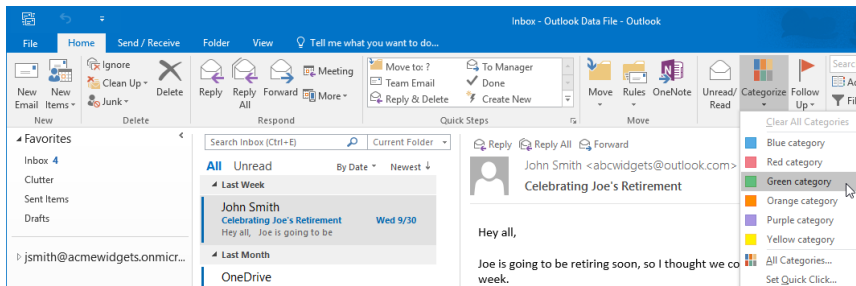
2. Click to select the most recent message inside the Inbox folder:



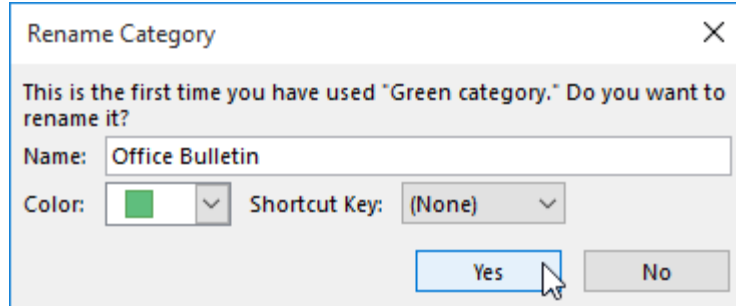
3. Click Home → Unread/Read:



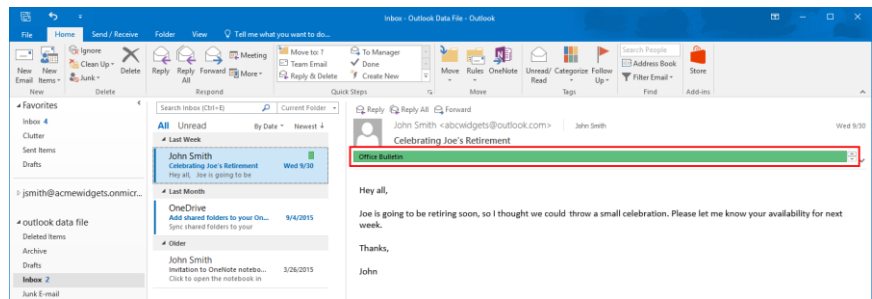
4. The selected message will now have been marked as unread. With the message still selected, click Home → Categorize → Green Category:



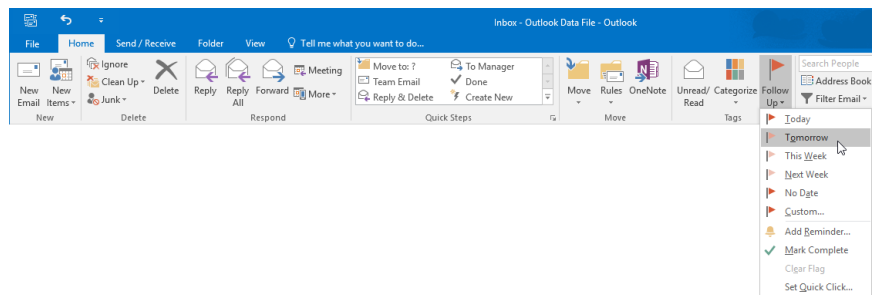
- As this is your first time using the green category, the Rename Category dialog box will be displayed. Type “Office Bulletin” into the Name text box and then click the Yes button:



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



- With the message still selected, click Home → Follow-Up → Tomorrow:



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



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

9. Close Microsoft Outlook 2016.

TOPIC B: Organize Messages Using Folders

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

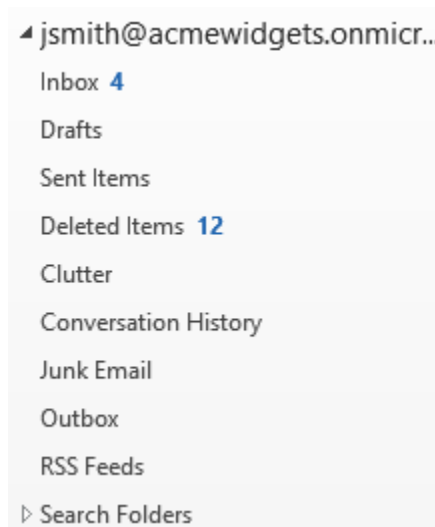
Topic Objectives

In this topic, you will learn:

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

DEFAULT E-MAIL FOLDERS

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



Let's take a look at each mail folder.

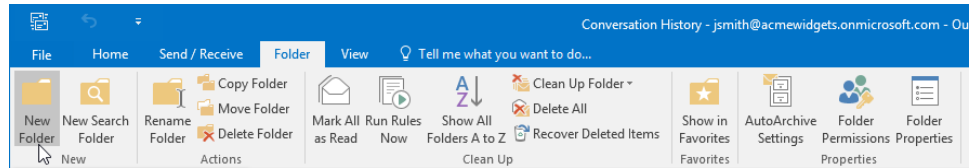
Inbox	This is where new mail is received.
Drafts	Unsent messages are saved here by default.
Sent Items	After a message is sent, a copy of it is stored here.
Deleted Items	This folder acts like the Recycle Bin in Windows. When you delete an Outlook item, it goes here first. To permanently remove the items in your Deleted Items folder, click Folder → Empty Folder while in the Deleted Items folder.
Clutter	Office 365 users have access to the Clutter folder. This is where low priority messages are automatically moved based on your previous reading behavior.
Conversation History	This folder will list conversation history for any contacts that you have interacted with using Microsoft Lync or Skype for Business.
Junk E-mail	E-mail marked as junk will be stored here.
Outbox	Messages you have created are stored here while Outlook connects to the server and sends the message.
RSS Feeds	Live feeds are stored here.
Search Folders	You can customize these folders to update based on search criteria.
Groups	Access shared workspaces. Only available with Office 365 accounts.

E-MAIL FOLDERS ON THE SERVER

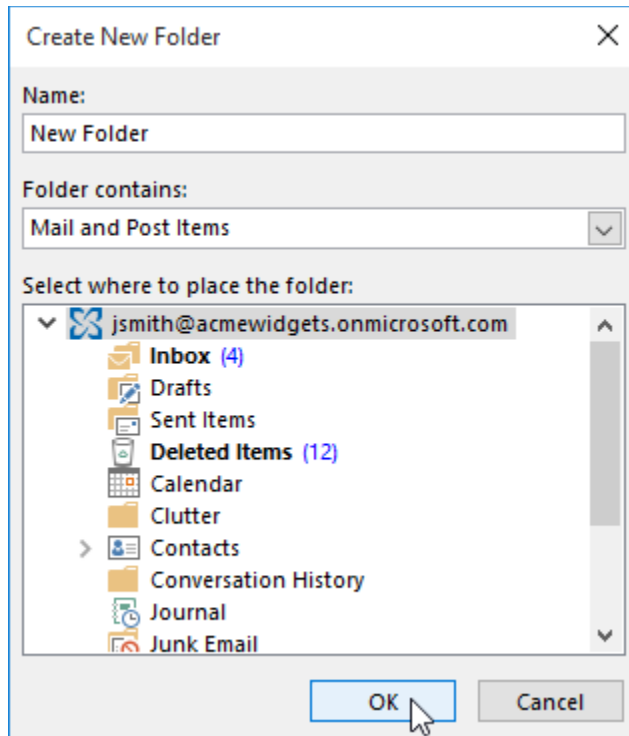
While the default e-mail folders cover storage needs for most situations, you also have the flexibility to create your own folders. Just like the default folders, you can use custom folders to store and save e-mails in a meaningful way. For example, if you are working on a large project that generates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

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

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



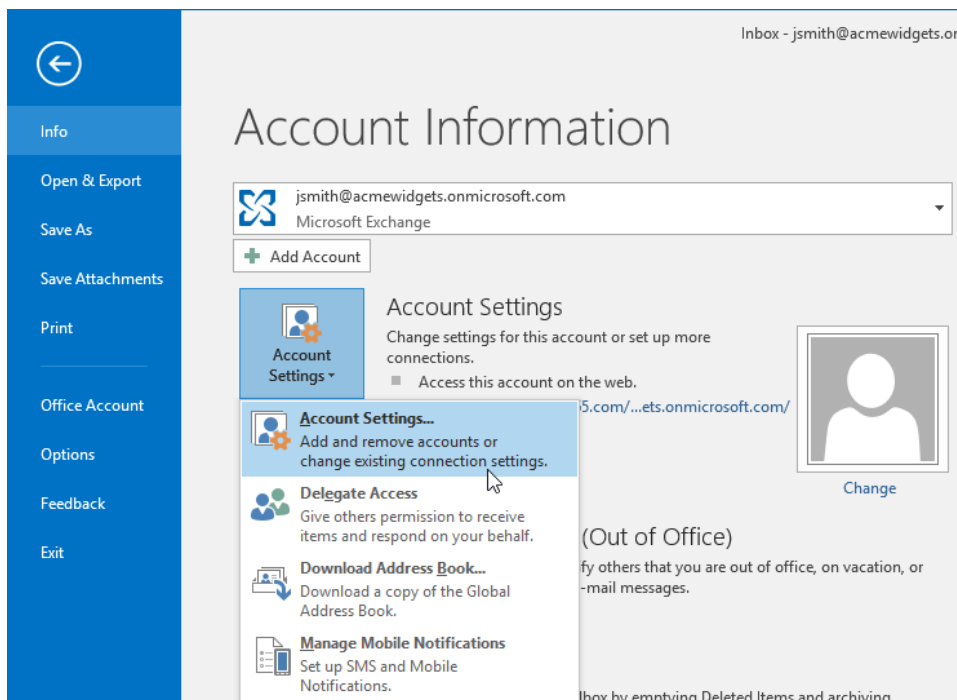
This action will display the Create New Folder dialog box. Using the controls in this dialog box, enter a name, choose the type of Outlook items that the new folder will contain, and select the location where you want the new folder to be placed. Click OK to create the folder:



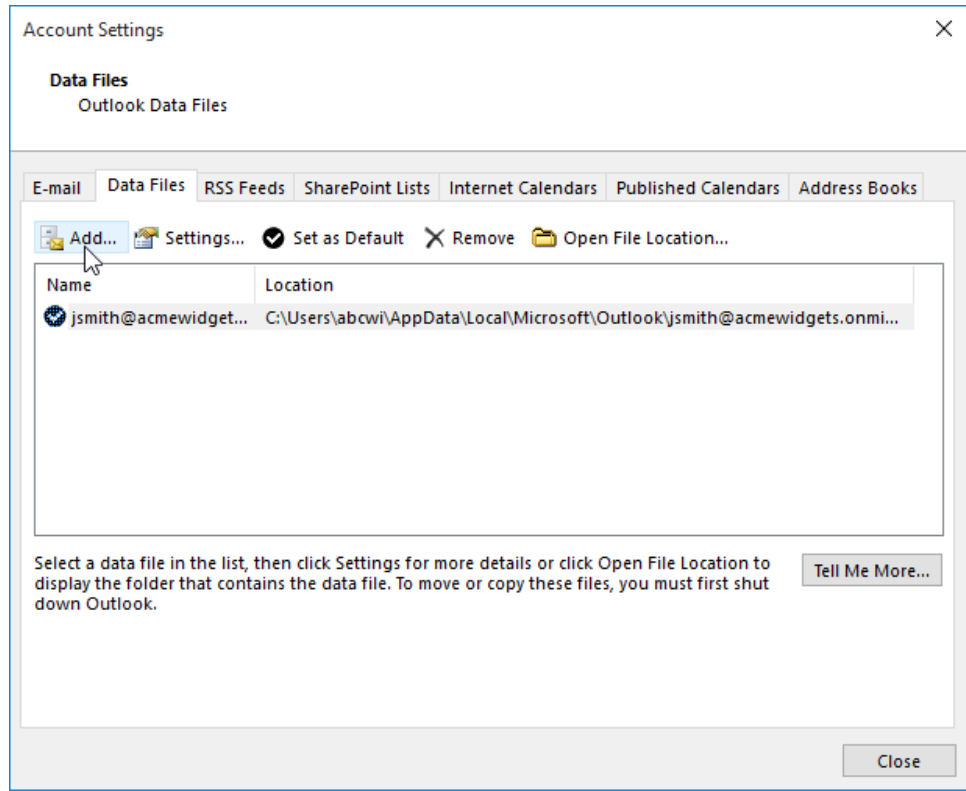
PERSONAL FOLDERS

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

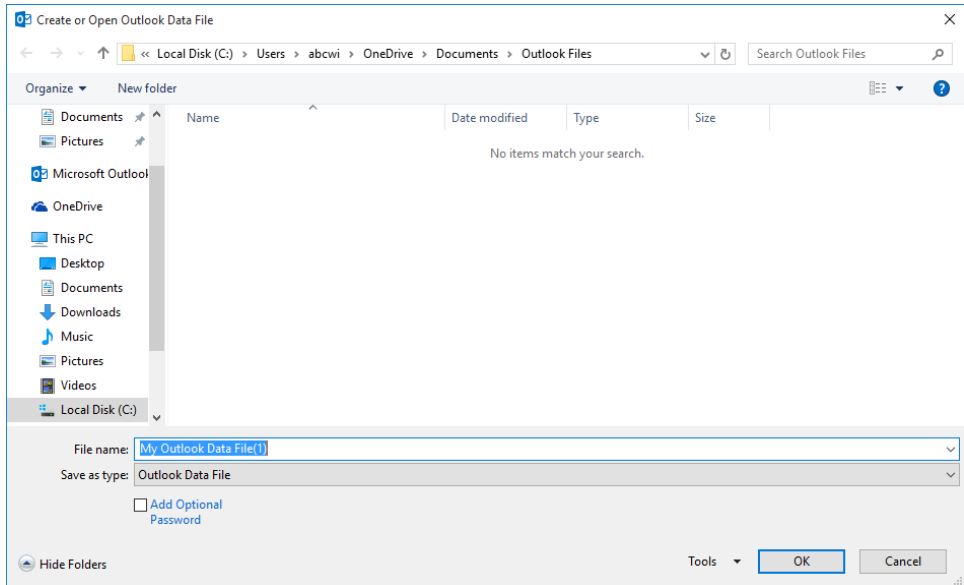
Personal folders are added as an Outlook Data File (.pst) and as such are managed in the Data Files tab of the Account Settings window. You can open this window by clicking File → Info → Account Settings → Account Settings:



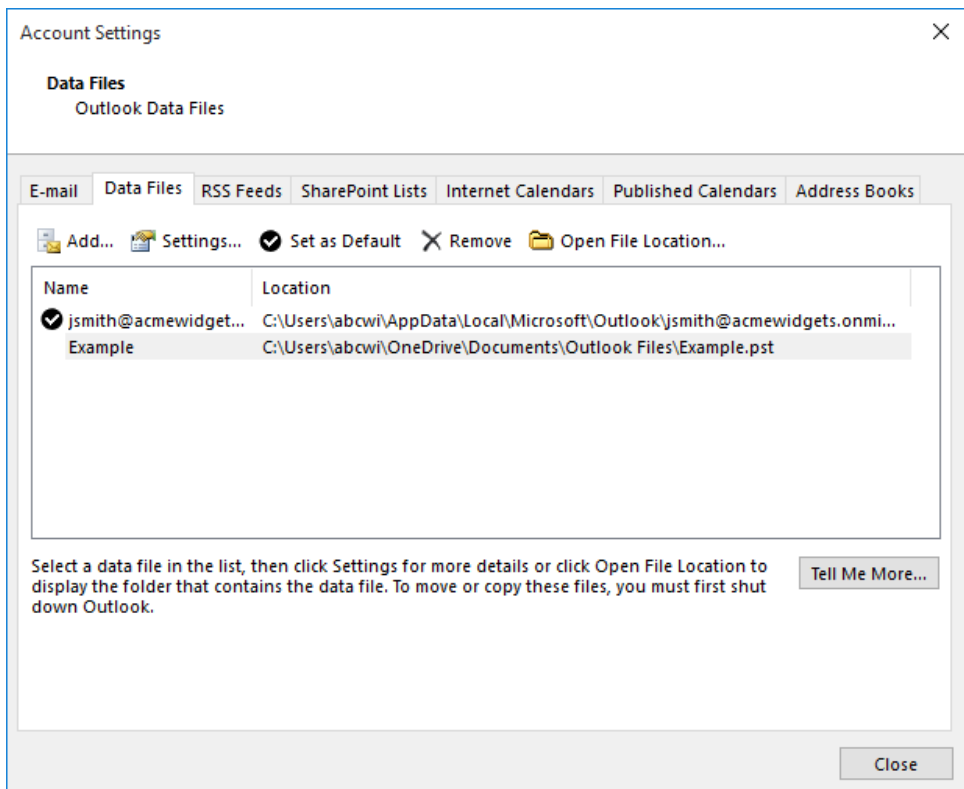
In the Account Settings window, click Add to get started:



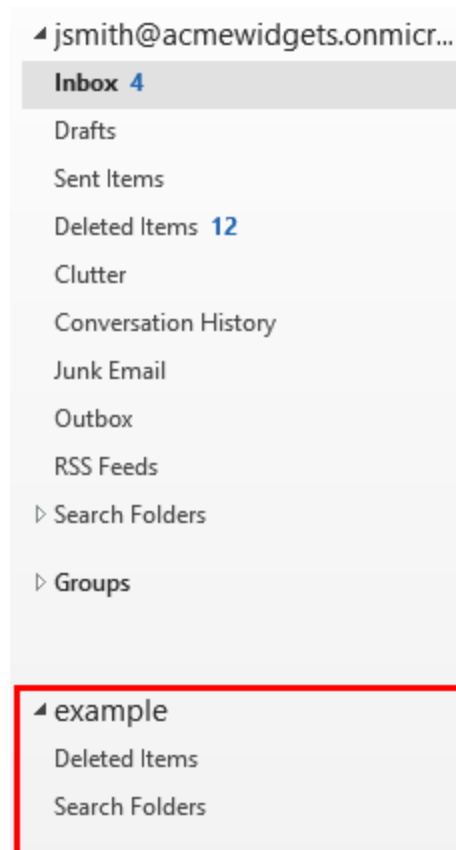
This will display the Create or Open Outlook Data File dialog box, open to the Outlook Files folder in the My Documents folder that is associated with your Windows user account. Using the controls in this dialog you can choose another location where you want the Outlook data file to be stored (if desired),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



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



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



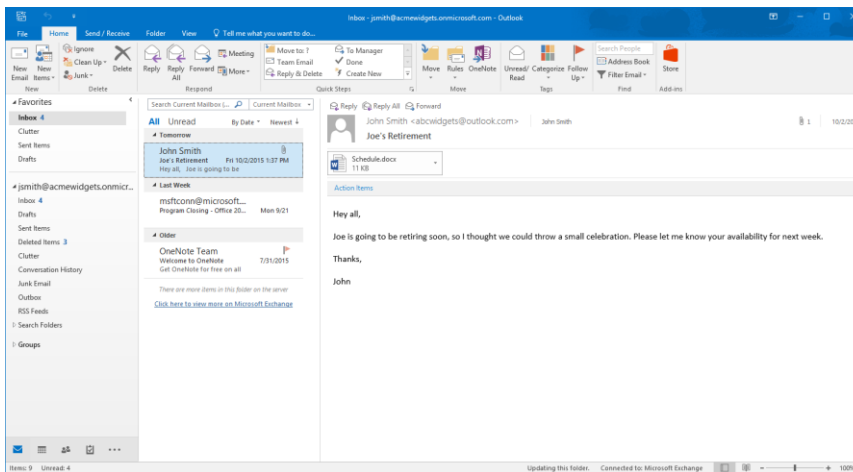
By default, new data files will include a Deleted Items folder and a Search Folders link, but you can add as many personal folders as you want by following the same steps as you would to add a regular folder to your mailbox.

ACTIVITY 4-2

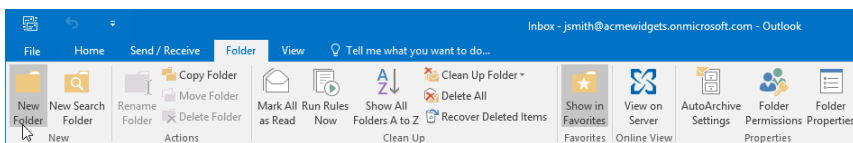
Organizing Messages Using Folders

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

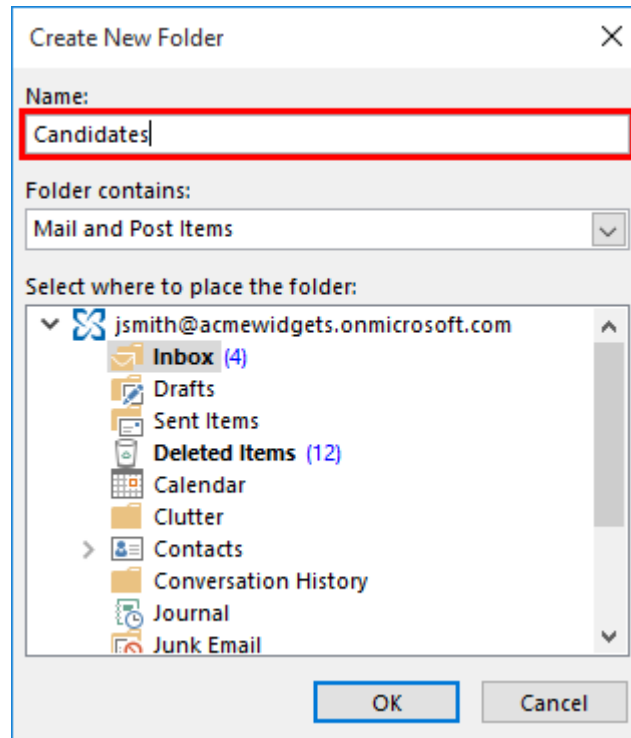
1. To begin, open Outlook 2016 to your Inbox:



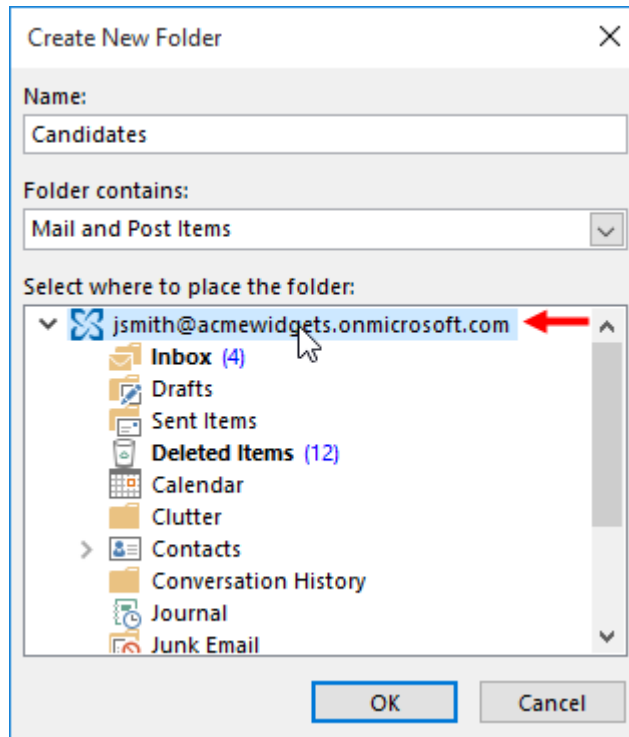
2. To create a new folder, click Folder → New Folder:



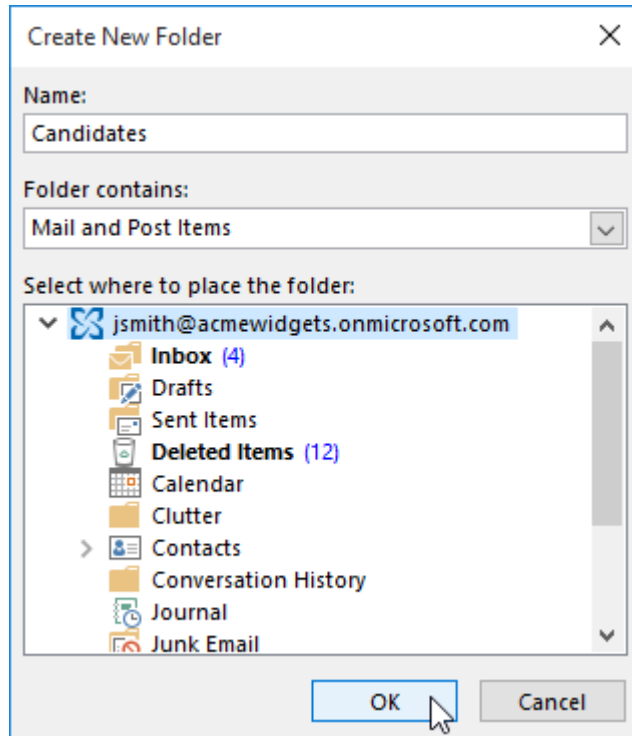
3. The Create New Folder dialog box will now be displayed. In the Name text box, type “Candidates:”



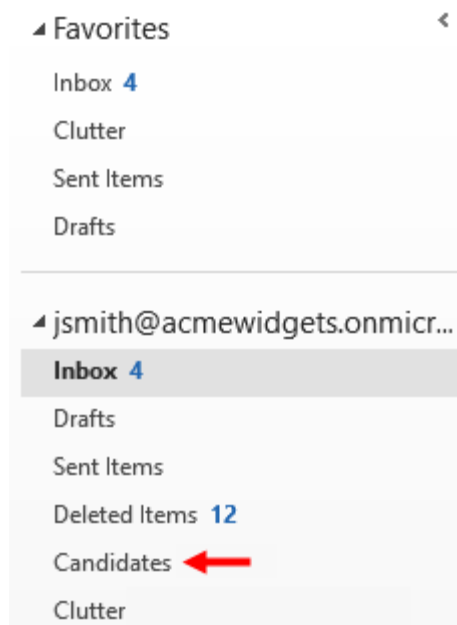
4. As this new folder is going to be used to store messages, you do not need to modify the “Folder contains” drop-down menu; however, you do need to choose where the folder will be placed. For this example, select the top-level item in the provided list:



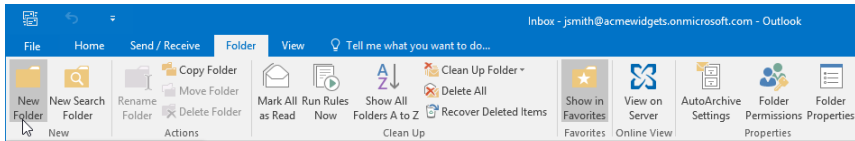
5. Click OK to create a new folder using the selected settings:



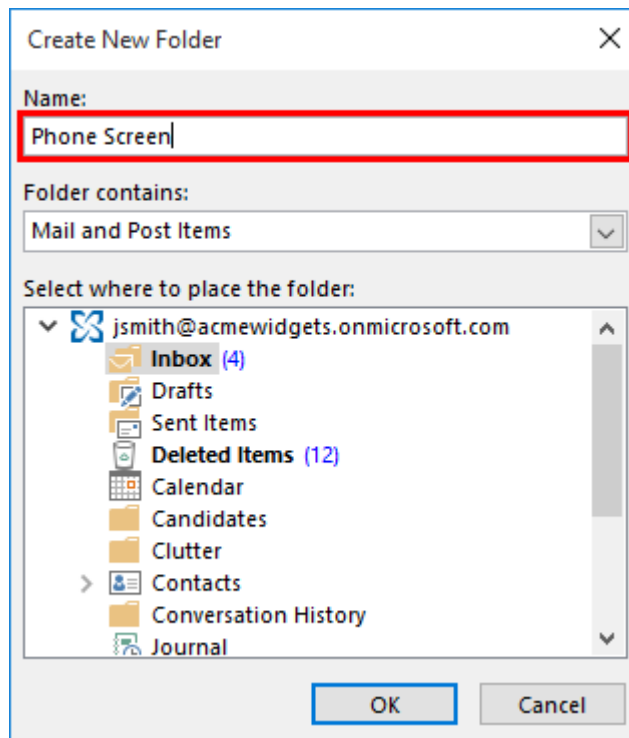
6. The new folder will now appear in the Navigation pane:



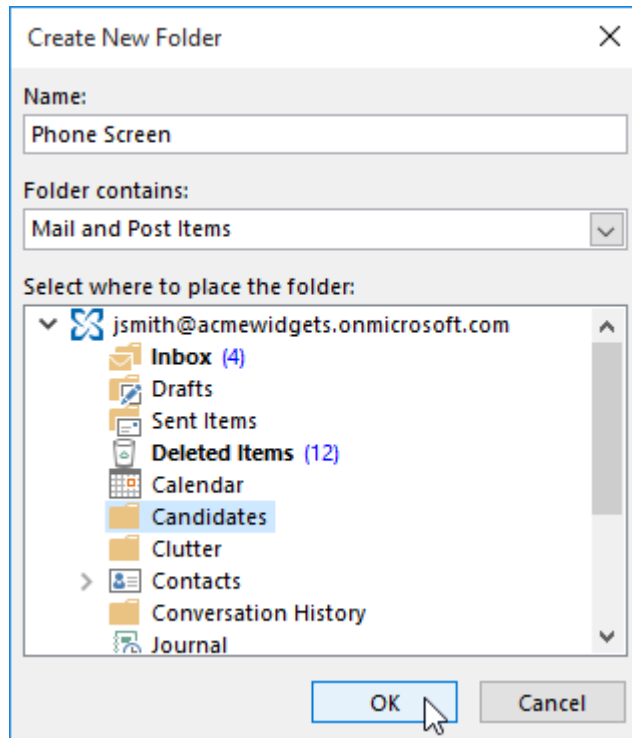
7. Now you need to create a subfolder within the Candidates folder for candidates that you would like to screen over the phone. Click Folder → New Folder:



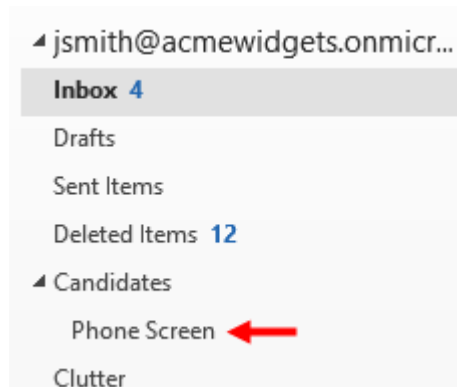
8. The Create New Folder dialog box will now be displayed. Type “Phone Screen” into the Name text box:



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



- The new subfolder will appear under the Candidates folder:



- Close Microsoft Outlook 2016.

Summary

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

REVIEW QUESTIONS

1. What is the command sequence to mark a message as unread?
2. What happens when you apply a color category for the first time?
3. What is the command sequence to set the follow-up quick click flag?
4. What happens when you choose to ignore a conversation?
5. What is the command sequence to create a new folder in your mailbox?

LESSON 5: MANAGING YOUR CALENDAR

Lesson Objectives

In this lesson you will learn how to:

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

TOPIC A: View the Calendar

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

Topic Objectives

In this topic, you will learn:

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


TYPES OF CALENDAR ENTRIES

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

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

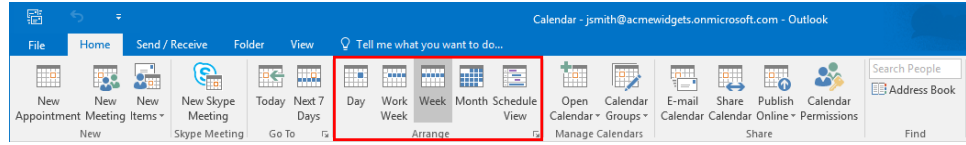
No matter which type of entry you add to a calendar, you have the option to schedule them as **recurring**. This means that you can have an activity appear on a regular basis going forward so that you do not have to manually enter them in each time. This feature is great for regular weekly meetings or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

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

Weekly Staff Meeting: 

CALENDAR GRID ARRANGEMENT OPTIONS

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

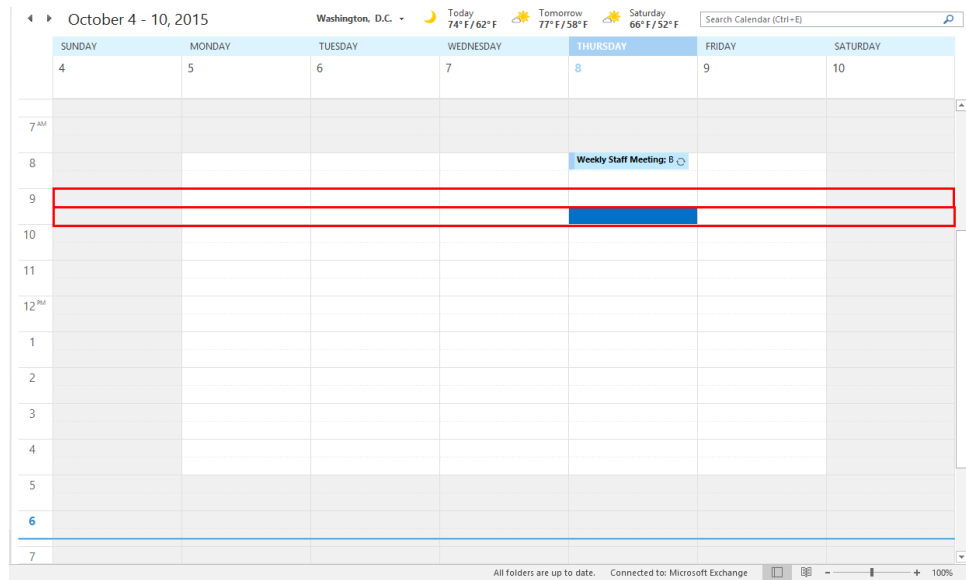


Notice that the current view is highlighted. Here is a breakdown of each option:

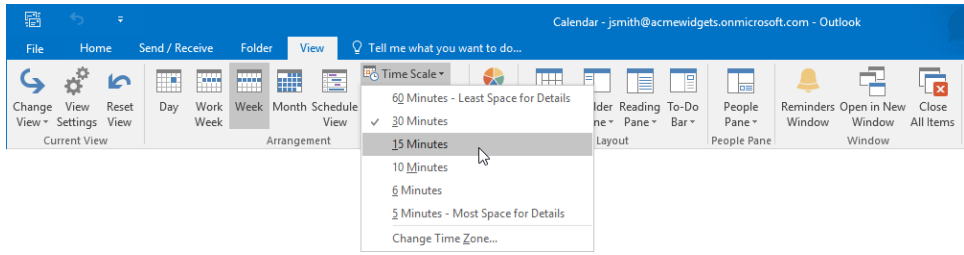
- **Day:** View one day at a time.
- **Work Week:** View a typical work week (Monday to Friday).
- **Week:** View an entire seven-day week.
- **Month:** View a month at a time.
- **Schedule View:** View a detailed schedule of the current date and time, compared against other calendars.

Time Scale Options

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



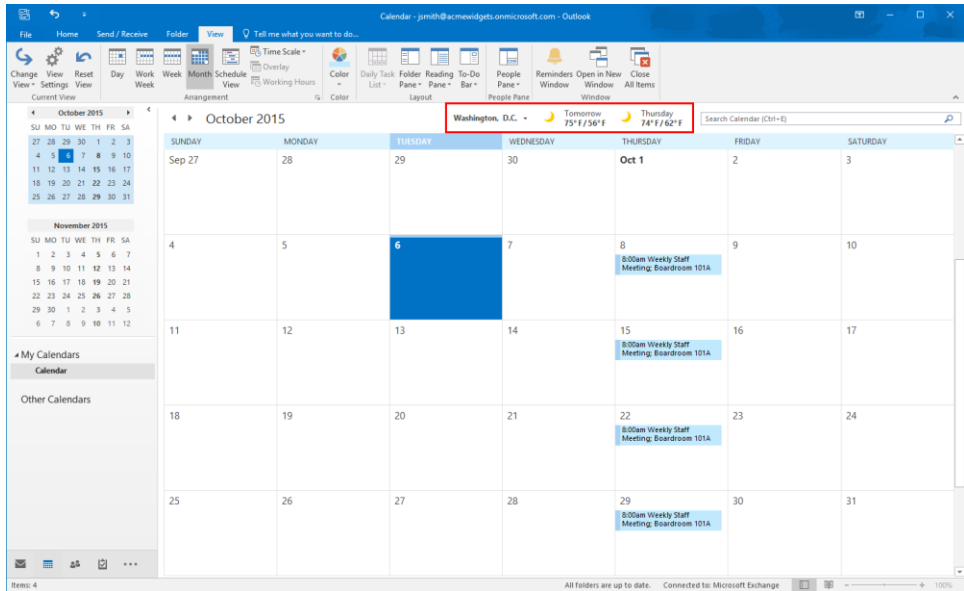
You can modify this aspect of your calendar by clicking View → Time Scale → [Time Scale]:



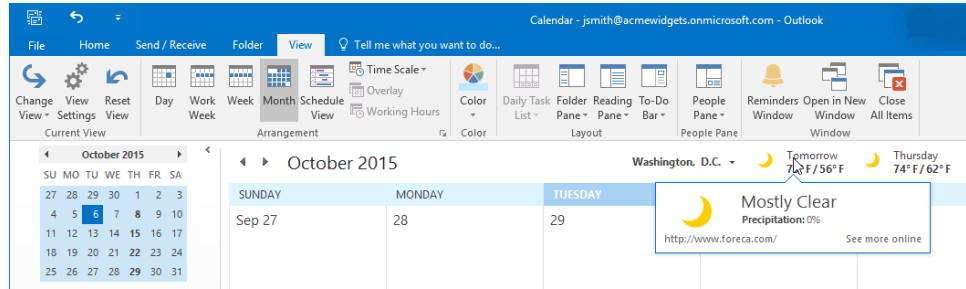
There are several different time scales that you can select from, with varying degrees of detail. Typically the 30 Minutes option will meet the needs of most people; however, those with busier schedules may want to consider one of the shorter options.

THE WEATHER BAR

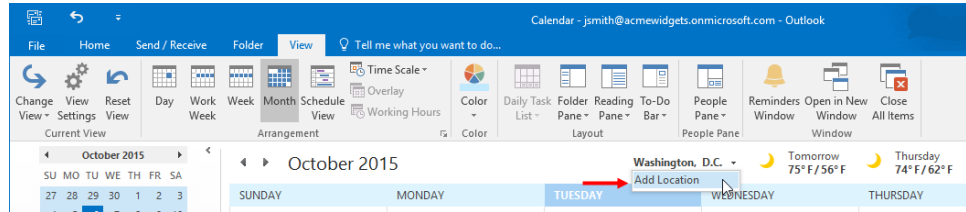
The Weather Bar appears above your calendar, just below the ribbon. This bar displays the weather conditions for the selected location for today, tomorrow, and the following day:



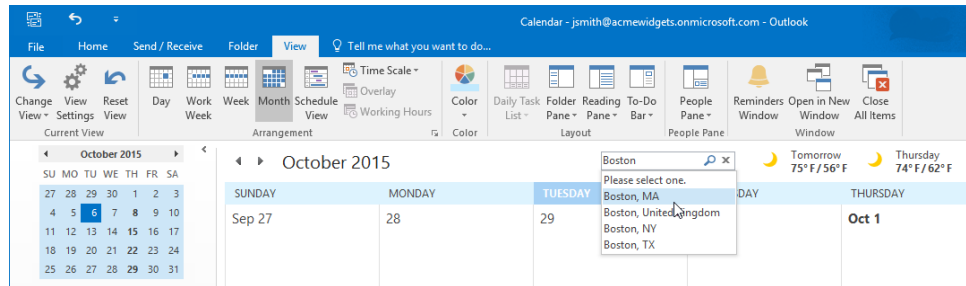
To view more detailed information about the weather reports, move your cursor over any of the two days on the bar. A pop-up will then display precipitation information and forecast details:



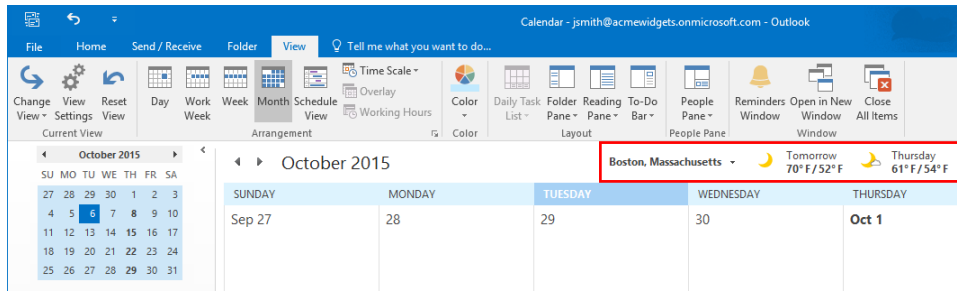
By default, the location is typically set to New York, NY or another major city. To change it, click on the city and click Add Location:



This action will display a search field in which you can enter the city where you reside. Type your city's name and press Enter, or click the small magnifying glass. After a moment, a list of results will be displayed in a small drop-down menu. Click the best matching result:



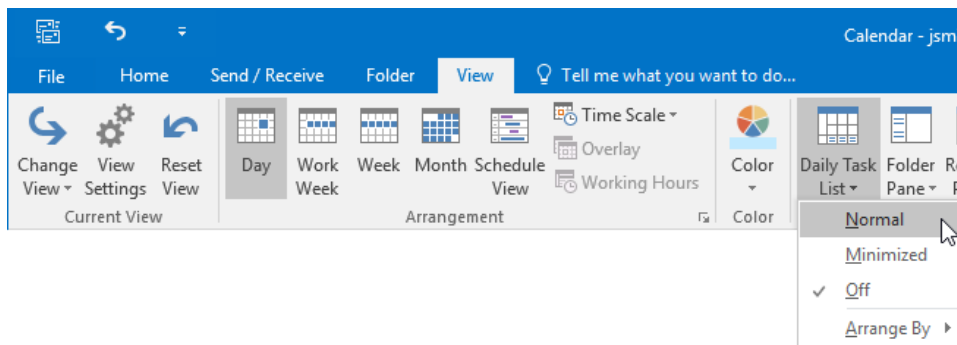
After a moment, the new weather reports will appear:



THE DAILY TASK LIST

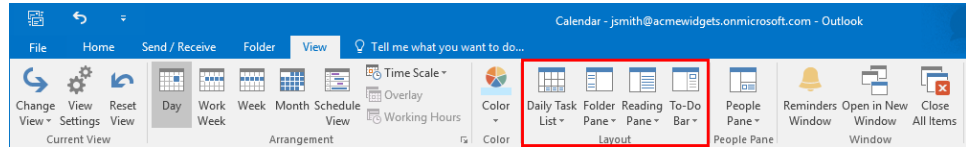
When the Daily Task List is displayed, it appears at the bottom of your calendar. This workspace will display any tasks that occur during the current time frame. While the name of the task will always be displayed, the details of the task (start date, due date, etc.) will only be displayed while using the Day calendar grid arrangement.

To toggle the Daily Task List on or off, click View → Daily Task List → [View Option]:



CALENDAR LAYOUT OPTIONS

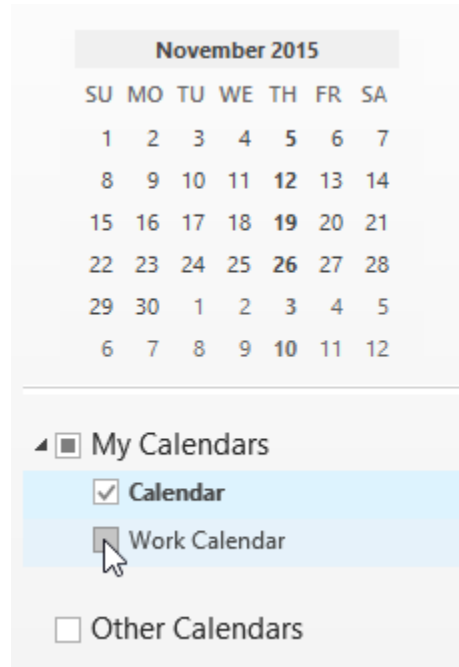
Like many aspects of Outlook 2016, the Calendar layout is very flexible. You can choose which components you would like to display, hide, or minimize. To modify what components are displayed and how, use the Daily Task List, Folder Pane, Reading Pane, and To-Do Bar drop-down commands within the Layout group of the View tab while in the Calendar workspace:



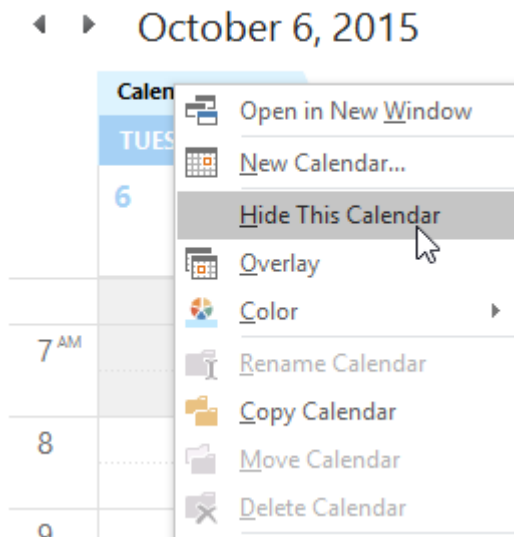
By default, the Navigation pane and Daily Task List are displayed. The Reading pane and To-Do Bar are both hidden from view.

Showing and Hiding Calendars

If you are working with multiple calendars, you can show or hide them by toggling their associated checkboxes in the My Calendars section of the Navigation pane:



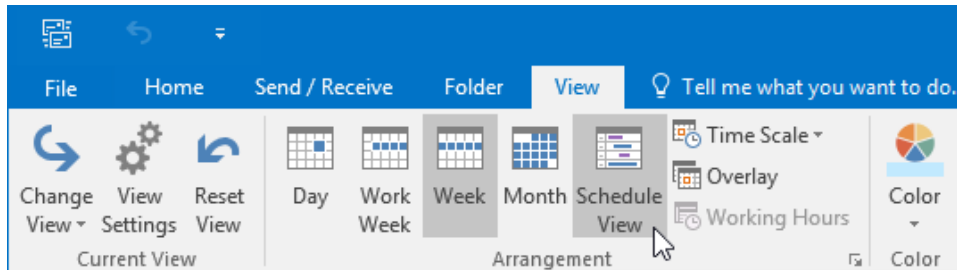
Alternatively, you can also right-click the tab for the calendar that you would like to hide and click Hide This Calendar:



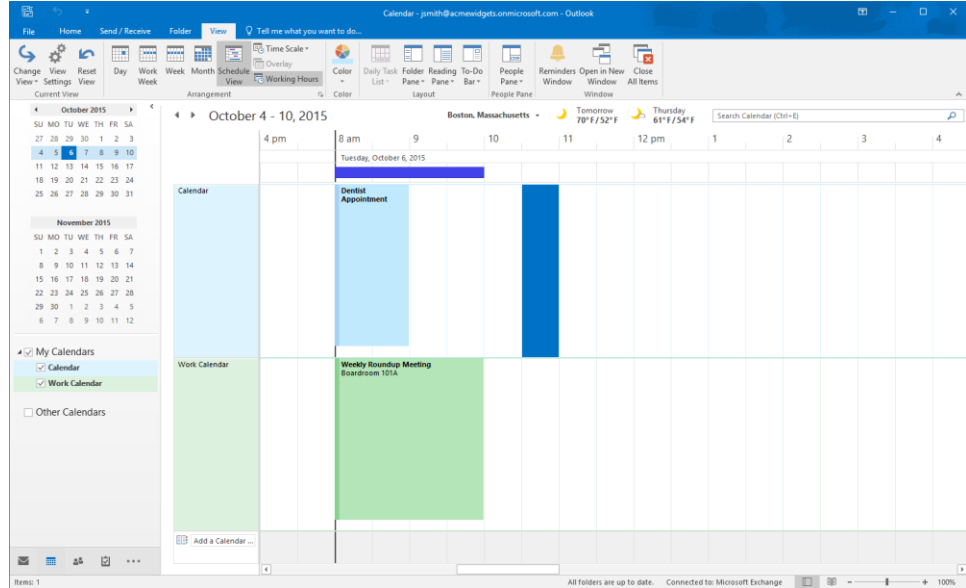
OVERLAYING CALENDARS WITH SCHEDULE VIEW

If you use multiple calendars, you may frequently find yourself trying to schedule appointments in one without causing conflicts with the other. **Schedule View** exists so that you can compare your calendars against each other easily and schedule appointments so that no conflicts occur.

To use the Schedule View, click View → Schedule View:

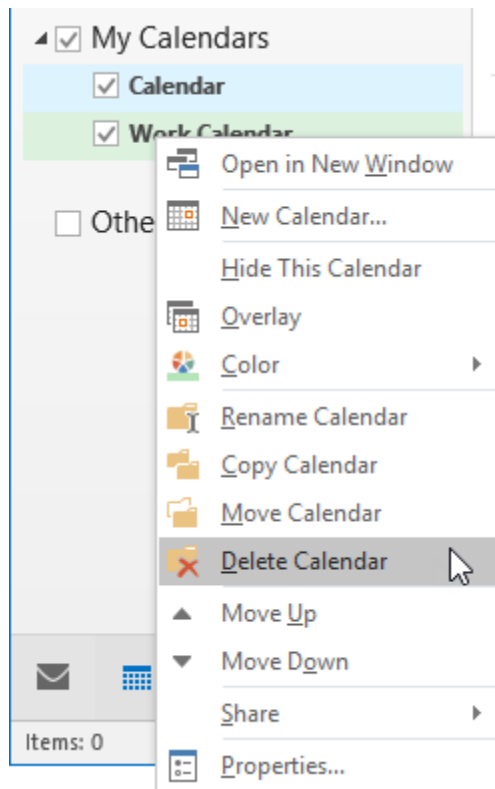


When applied, the Schedule View will stack any displayed calendars in the same view. This way you can easily identify any conflicts between the displayed calendars. You can also schedule appointments as you would in any other calendar view:

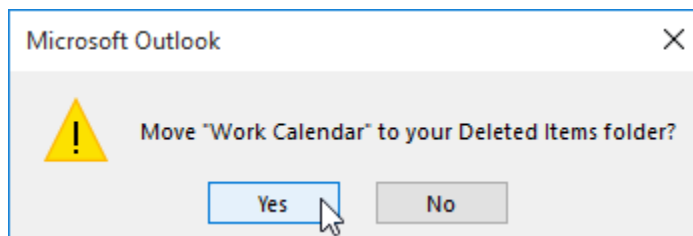


DELETING CALENDARS

You can delete any calendar (other than the default) from your mailbox by right-clicking its listing in the My Calendars section of the Navigation pane and clicking Delete Calendar:



A dialog box will appear in which you need to confirm this action. Click Yes:



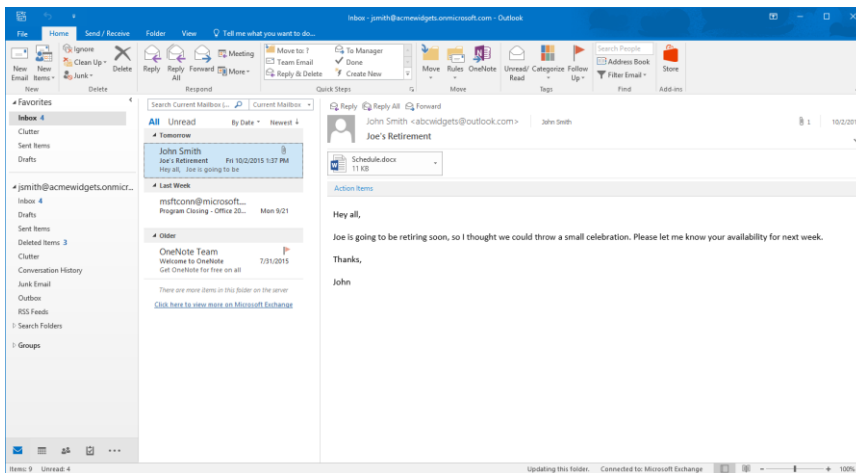
The calendar in question will then be moved to the Deleted Items folder.

ACTIVITY 5-1

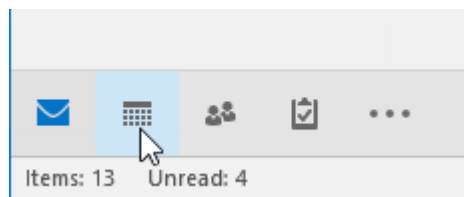
Customizing Your Calendar View

As you become more familiar with the Calendar workspace in Outlook 2016, you would like to examine some of the different ways that you can customize it.

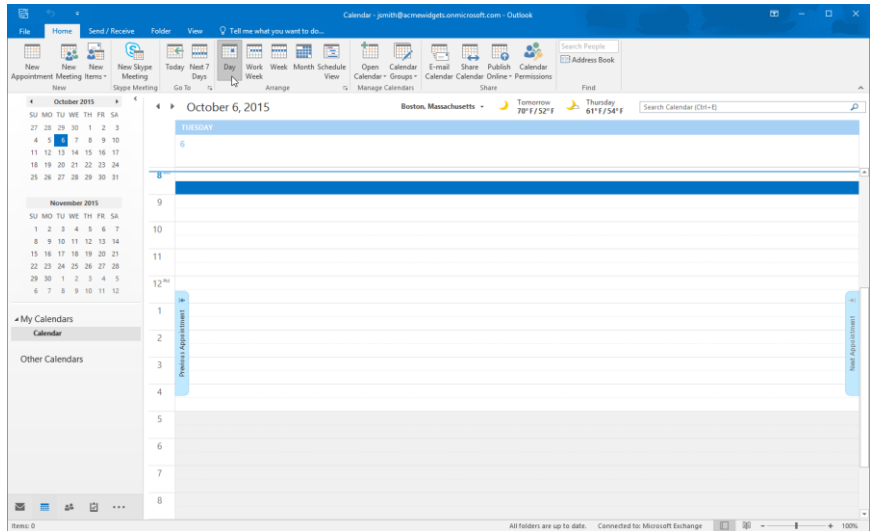
1. To begin, open Outlook 2016:



2. Display the Calendar workspace by clicking the Calendar button in the Navigation pane:

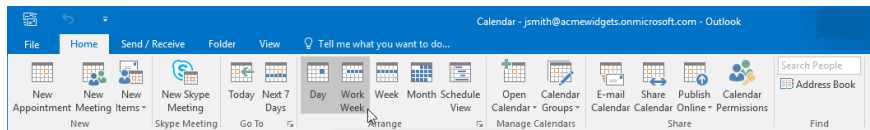


3. The Calendar workspace will now be displayed. Examine the Arrange group on the Home tab to ensure that the Day option has been selected. If it has not, select it now:

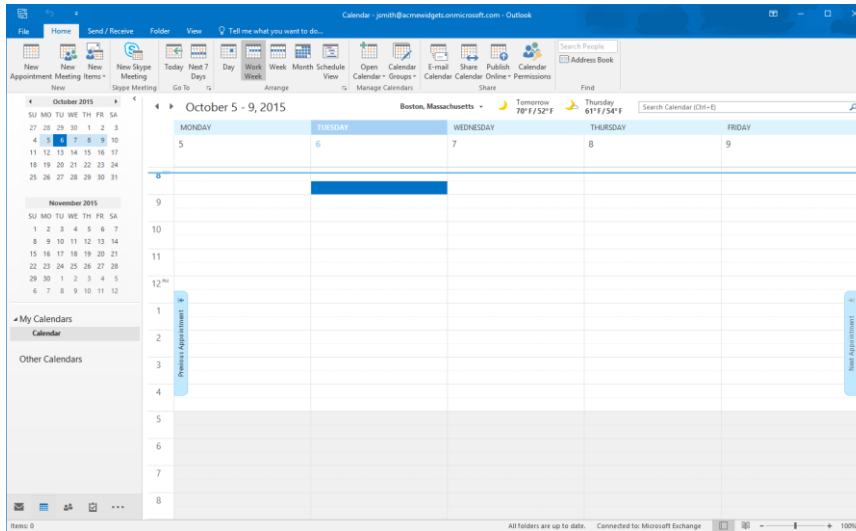


(If this option is selected, skip to the next step.)

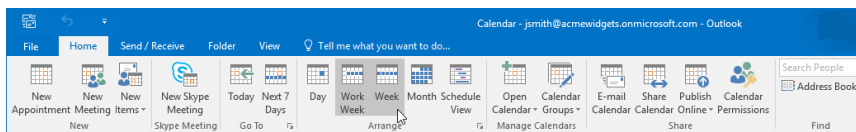
4. Now click Home → Work Week to view that option:



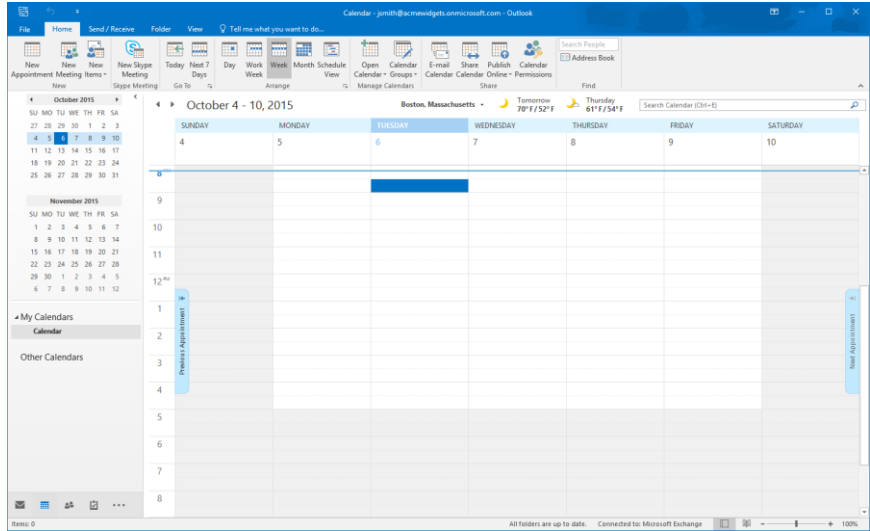
5. With the Work Week option applied, you will see that the weekend dates are hidden entirely and the current date will be selected:



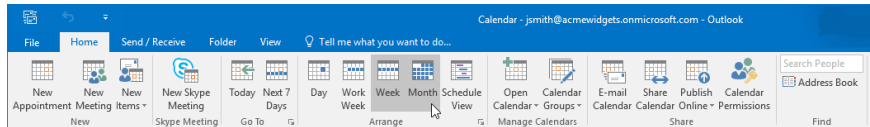
6. Click Home → Week:



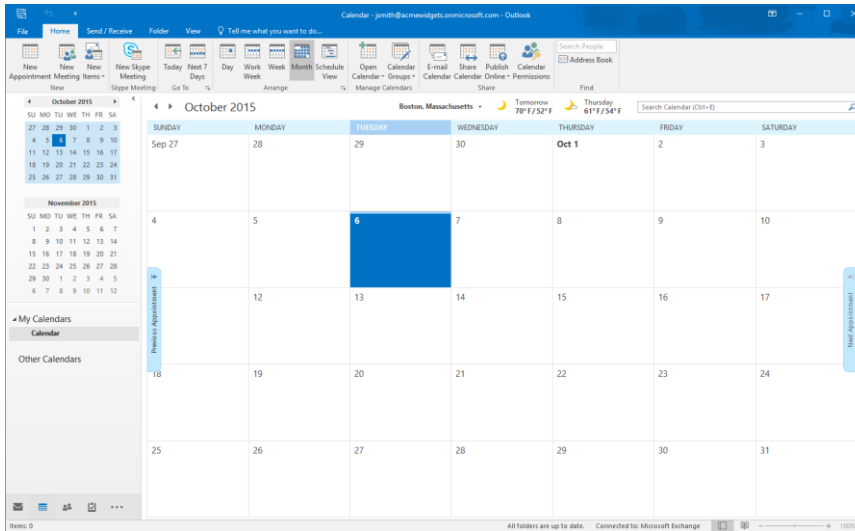
7. With the Week option applied, the calendar will include the entire seven-day week. Weekends are separated from the work week with shading:



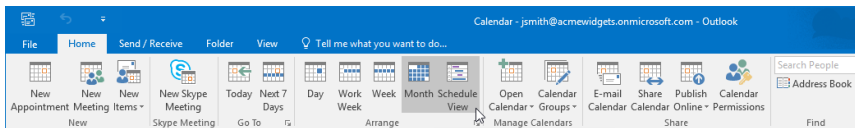
8. Click Home → Month:



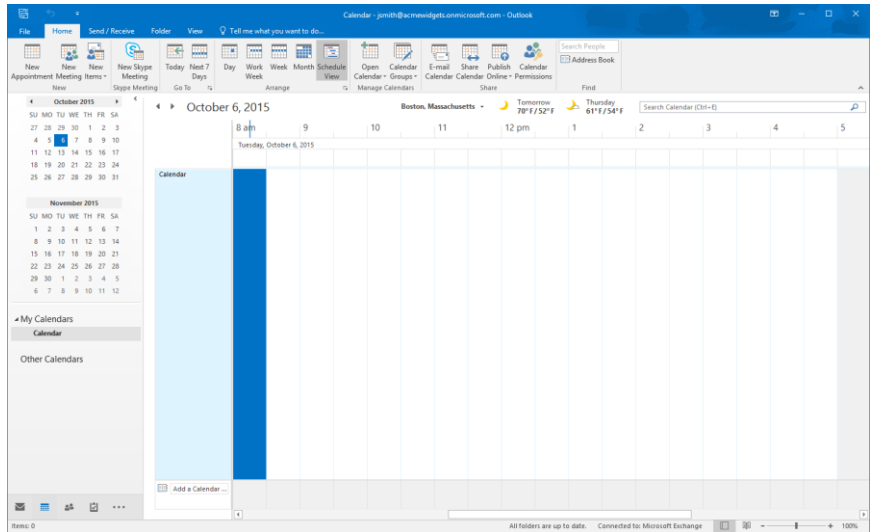
- 9. With the Month option applied, you will see that you have a much broader picture of your calendar:



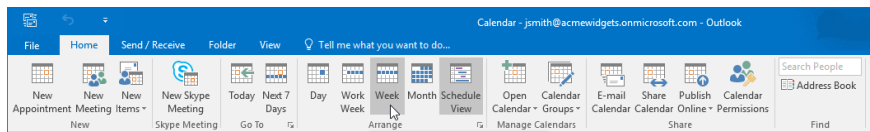
- 10. Click Home → Schedule View:



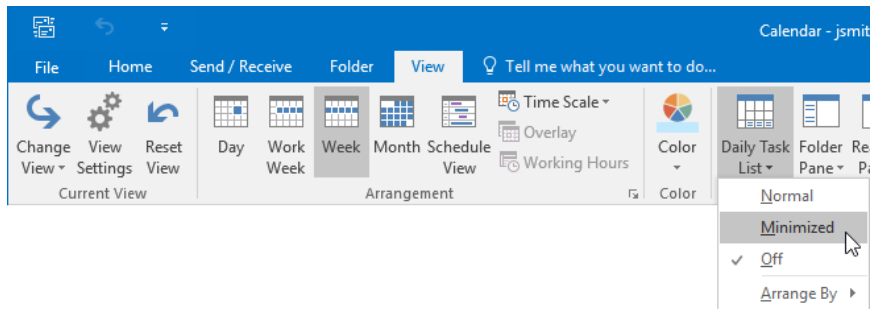
- 11. With the Schedule View applied, you will see a very detailed view of the current day and any planned activities. This is the option that you would choose if you wanted to compare one calendar with another:



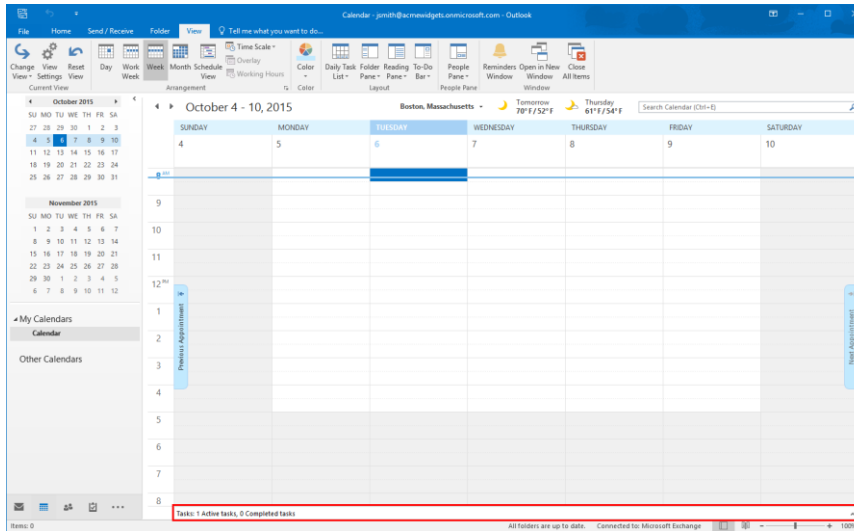
- 12. Return to the Week option by clicking Home → Week:



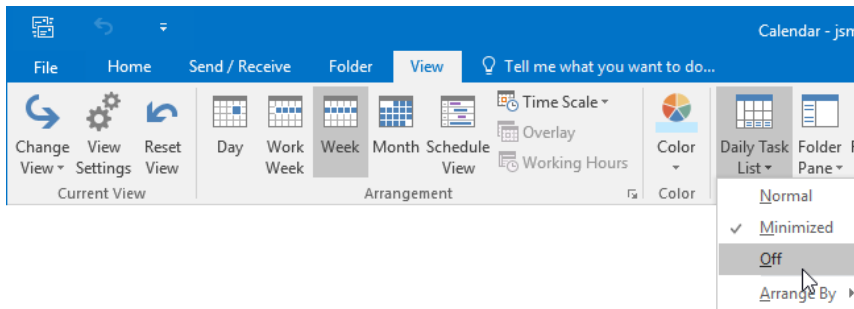
- 13. You would like to see how the Daily Task List will look when minimized. Click View → Daily Task List → Minimized:



14. You will see that the minimized state of the Daily Task List displays it as a thin bar along the bottom of the calendar:



15. Return the Daily Task List to its default state by clicking View → Daily Task List → Off:



16. Close Microsoft Outlook 2016.

TOPIC B: Manage Appointments

Once you have configured the Calendar workspace to your personal preferences, you can begin adding appointments and managing them. Over the course of this topic, you will learn more about appointments in Outlook and how they are managed in the Calendar workspace.

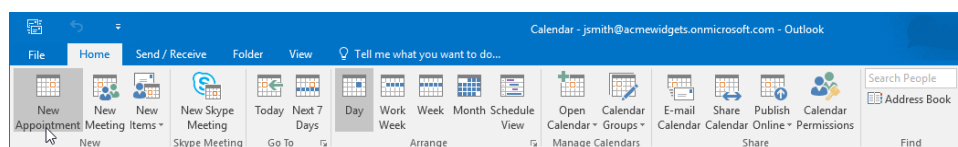
Topic Objectives

In this topic, you will learn:

- About the Appointment form
- How to create recurring events
- About reminders
- About the Show As options
- About the Private option
- How to categorize appointments
- How to set appointment priority
- How to search, print, and forward appointments

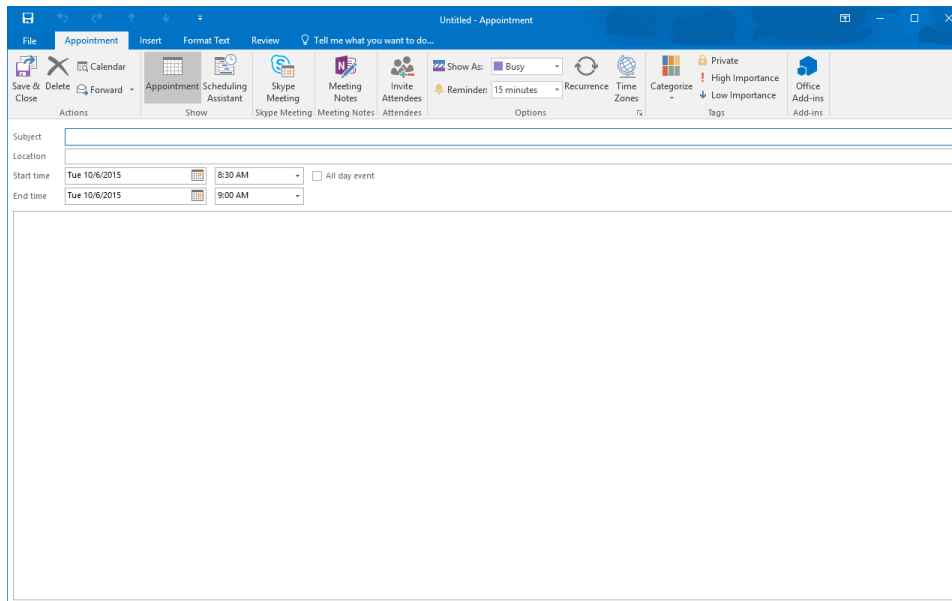
THE APPOINTMENT FORM

To add an appointment to your calendar, open the Appointment form by clicking Home → New Appointment while in the Calendar workspace:



(If you are not in the Calendar workspace, click Home → New Items → Appointment.)

The Appointment form includes a variety of different fields that are used to add the event’s details:

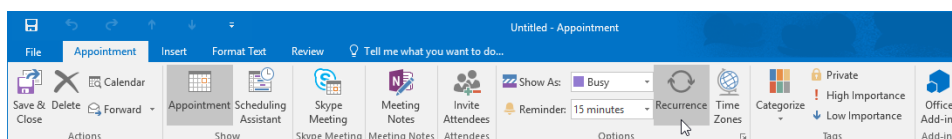


Here is an overview of the available fields.

- In the **Subject** field, you can enter a quick description of the appointment. This is what you will see when the appointment shows up on the calendar.
- In the **Location** field, you can enter where the appointment will take place.
- The “**Start time**” and “**End time**” menus allow you to choose when the appointment will start and end.
- Additionally, you can check the “**All day event**” checkbox if the event you are adding spans an entire day.
- Inside the **Appointment form body**, you can add more details or notes about the appointment.

CREATING RECURRING EVENTS

If your appointment repeats on a regular basis, you can schedule it as a recurring event. To this, click Appointment → Recurrence:



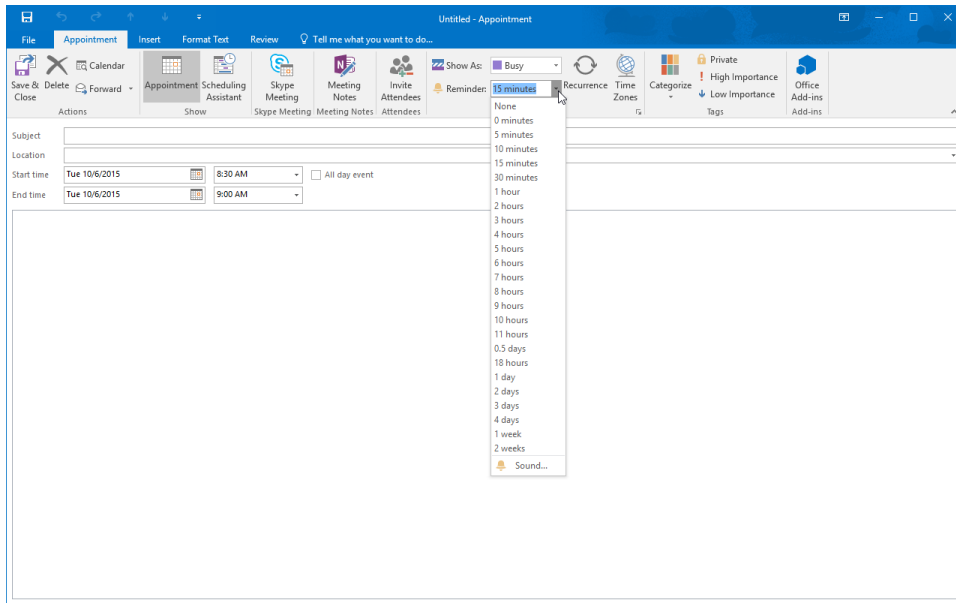
This action will display the Appointment Recurrence dialog box. Using its controls, you are able to choose the start time, end time, and duration for the recurring appointment. Next, you can choose a recurrence pattern (daily, weekly, monthly, or yearly). Finally, using the controls in the “Range of recurrence” section you are able to choose how long you want this recurring appointment to continue:

Click OK to save the recurrence settings. Note that you can remove a recurrence by clicking the Remove Recurrence button in this dialog box.

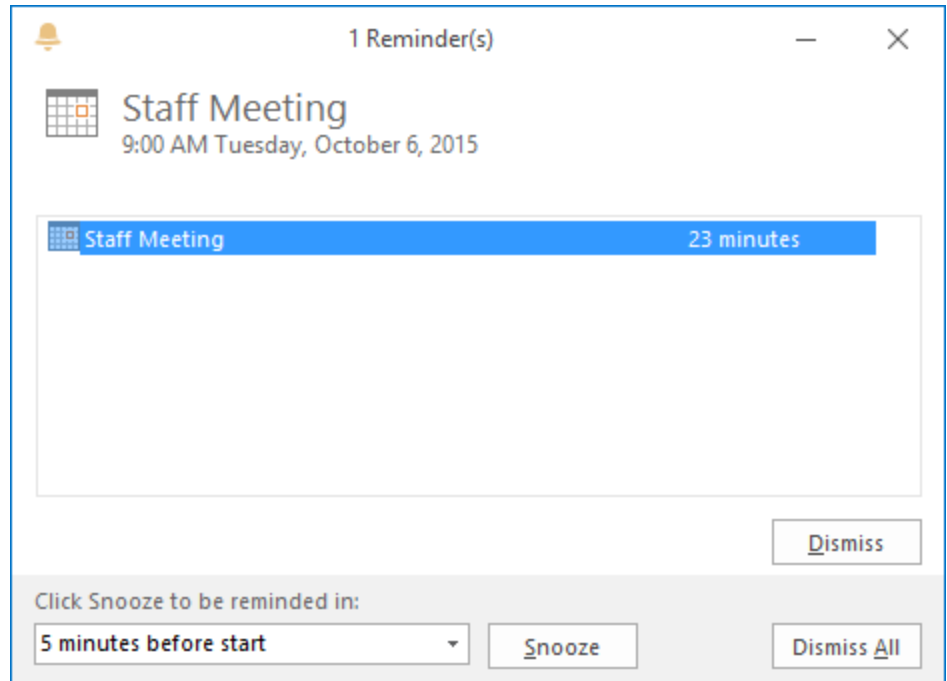
REMINDERS

When adding a new appointment to your calendar, you have the option to set a reminder. This will take the form of a visual and audio alert that will notify you when the appointment is coming up. Hourly appointments have a 15 minute reminder by default, while all-day events will include a reminder 18 hours prior to the event.

To modify these settings, click Appointment → Reminder → [Time]:

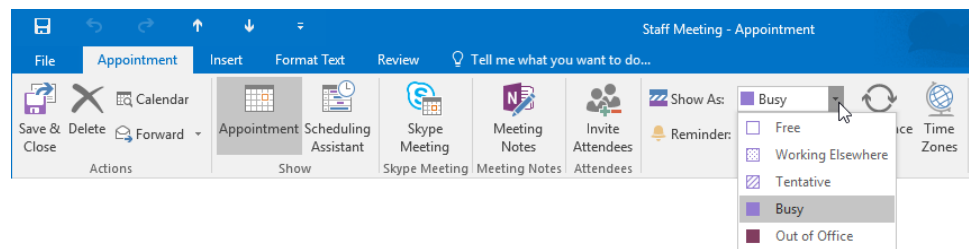


When the reminder is triggered by an upcoming event, it will appear in a separate dialog box. The appointment subject, start time, and location will be listed. You will be given an option to dismiss the reminder, as well as open the appointment to view its details. Additionally, you can choose to be reminded again by clicking the Snooze button. This action will remind you five minutes later by default, but you can customize this duration using the provided drop-down menu:



SHOW AS OPTIONS

When adding an appointment using the Appointment form, you have the option to indicate your status during this period. This helps anyone looking at your calendar to identify when you are and are not available. To choose a Show As option, click Appointment → Show As → [Show As Option]:



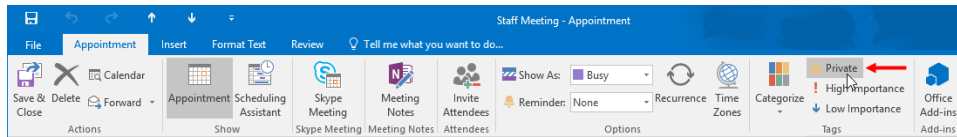
There are five options that you can choose from: Free, Working Elsewhere, Tentative, Busy, and Out of Office.

- The **Free** option will indicate to others that you are available during this time period even though you have an appointment.
- The **Working Elsewhere** option will indicate to others that you are available, but working at a different location than you normally do.
- The **Tentative** option indicates that you might be available.
- The **Busy** option indicates that you are unavailable during this time period.

- The **Out of Office** option shows you as being unavailable and out of the office entirely.

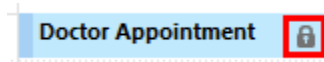
THE PRIVATE OPTION

When creating a new appointing using the Appointment form, you can mark it as private by clicking Appointment → Private:



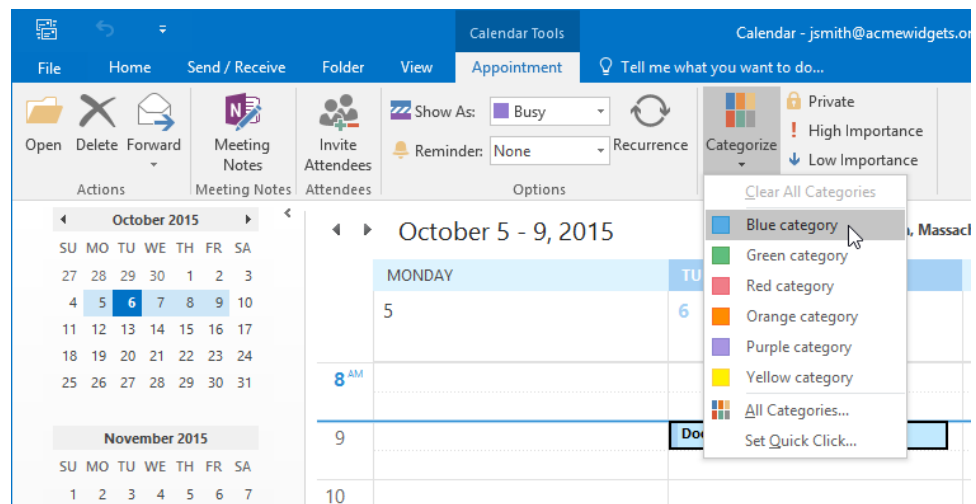
By marking an appointment private you can hide the details from anyone who is able to view your calendar, but still mark yourself as unavailable during the specified time.

You can identify such entries in your calendar by the lock icon:



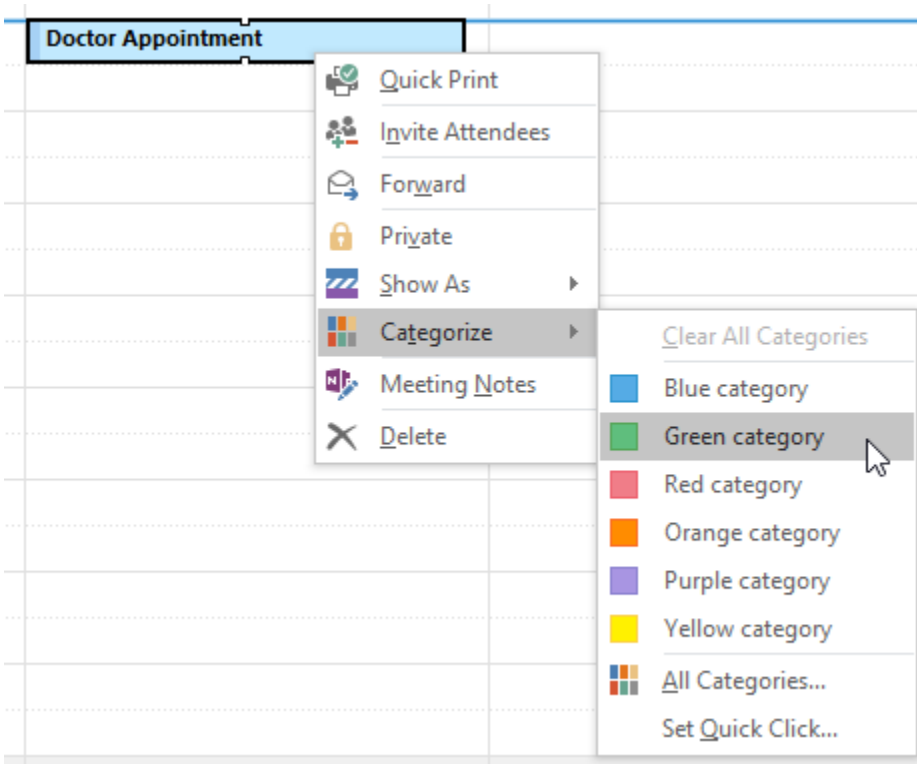
CATEGORIZING APPOINTMENTS

Like other Outlook objects, you are able to categorize appointments so that you can keep them better organized. To categorize an appointment, first select the appointment in question, and then click Calendar Tools – Appointment → Categorize → [Category]:

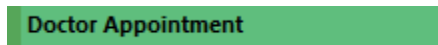


The Clear All Categories option in this menu will remove all categories from the item. To clear a single category, click Categorize and click the category to remove from the item.

Alternatively, you can right click an appointment and click Categorize → [Category]:



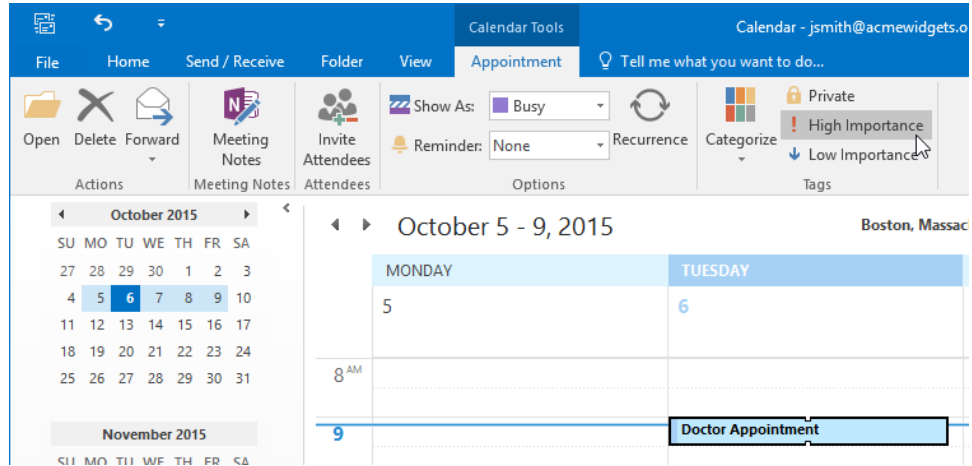
(Remember, when choosing a category for the first time, you will be prompted to give it a name.) Once it is categorized, an appointment will be shown in the color of the category that was selected:



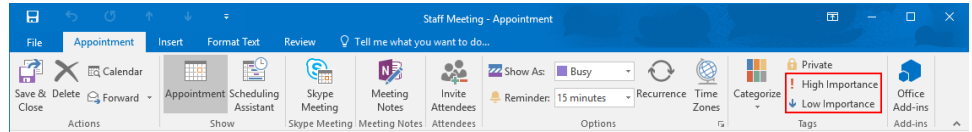
SETTING APPOINTMENT PRIORITY

Similar to messages, you are able to assign a priority level to an appointment. If it is a particular important appointment you can give it a high priority level, but if it is an appointment that can be moved you can give it a low priority level.

To set appointment priority, first select the appointment in question. Then, click Calendar Tools – Appointment and choose High Importance or Low Importance:



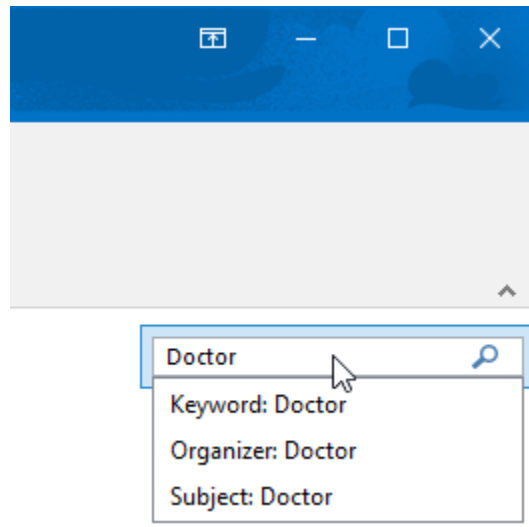
You can also find these commands on the Appointment tab when creating the appointment:



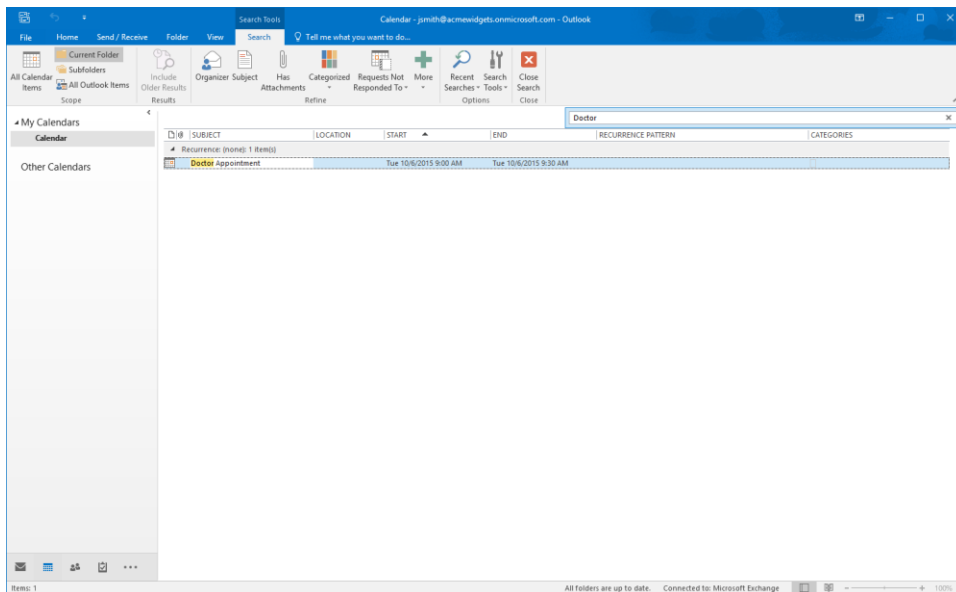
SEARCHING APPOINTMENTS

As your calendar becomes more crowded, it can become more difficult to find the specific appointment that you would like to work with. To make finding appointments simpler, a search text box has been provided near the top right-hand corner of the Calendar workspace.

To use this feature, first click inside of the search field (or press Ctrl + E) and type the keywords that you would like to search for:

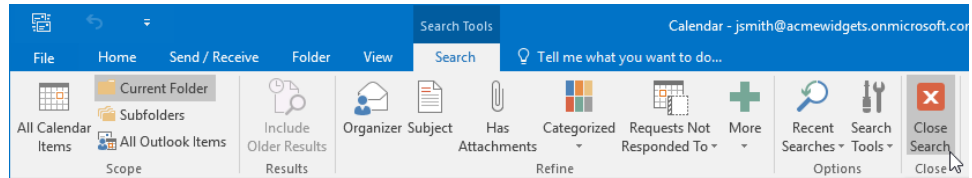


A list of results will immediately be shown that you can then work with:



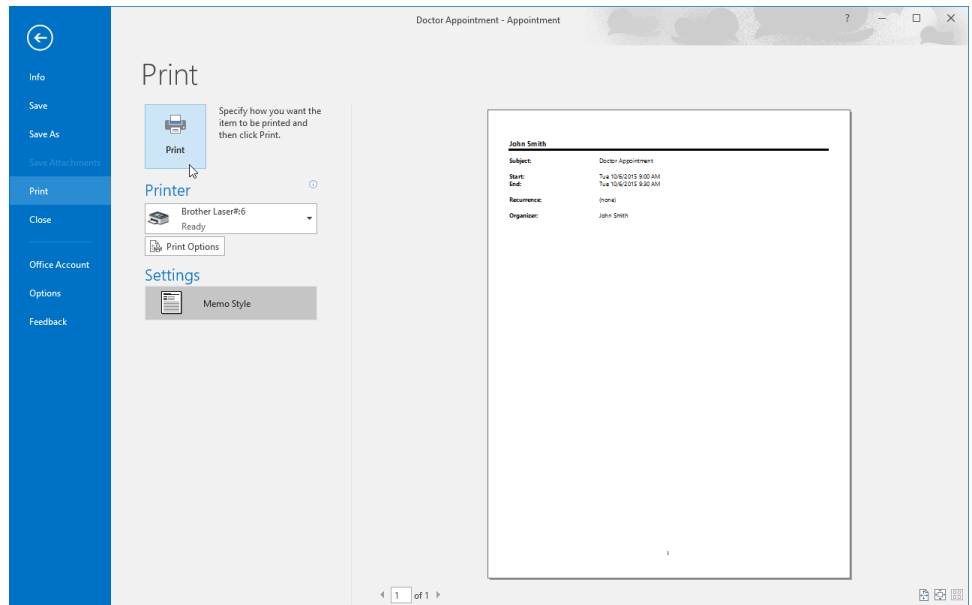
Additionally, the Search Tools – Search contextual tab will be displayed on the ribbon. Here, you can narrow down your search even further by adding more search criteria like subject, category, and much more.

When you have finished searching, click Search Tools – Search → Close Search:

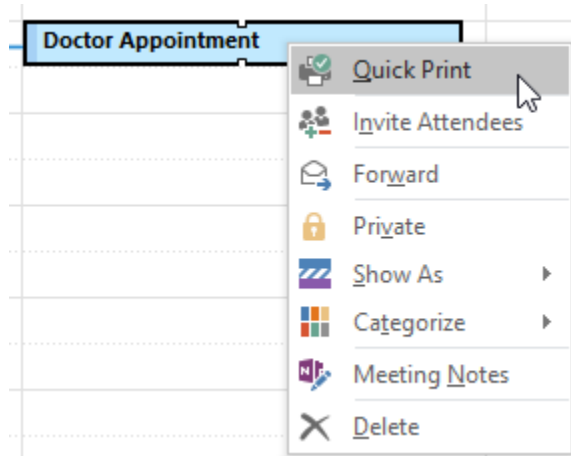


PRINTING APPOINTMENTS

To print an appointment from the Appointment form, click File → Print → Print:



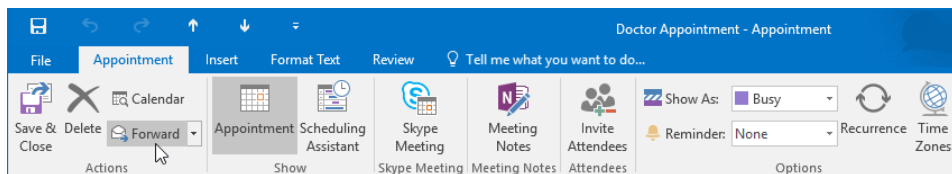
Alternatively, you can right-click on an appointment in your calendar and click Quick Print:



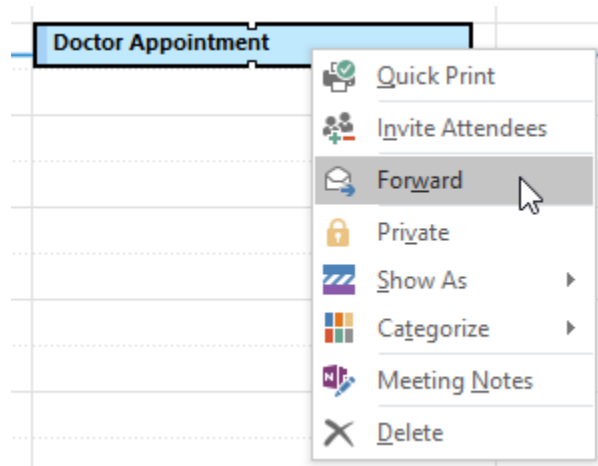
This option will print the appointment details using the default printer and its default configuration.

FORWARDING APPOINTMENTS

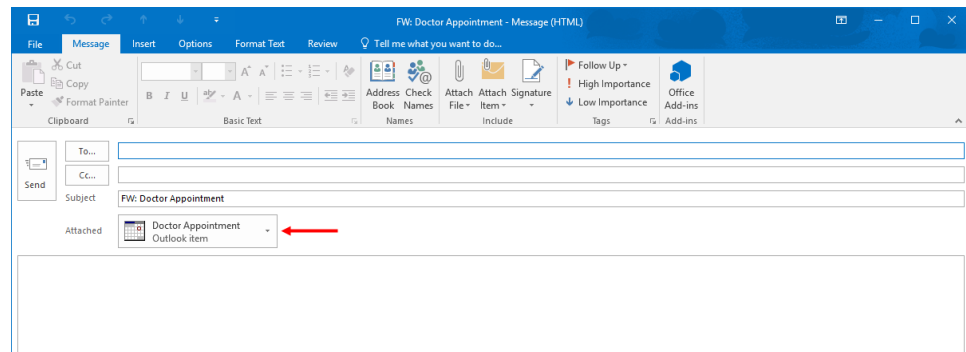
Outlook objects, including appointments, can be shared amongst other people who use Outlook as an e-mail client. To forward an appointment to other people so that they can view it and add it to their own calendars, click Appointment → Forward (with the Appointment form open):



Alternatively, you can right-click an appointment in your calendar and click Forward:



In either case, a new Message form will be displayed with the selected appointment included as an attachment:



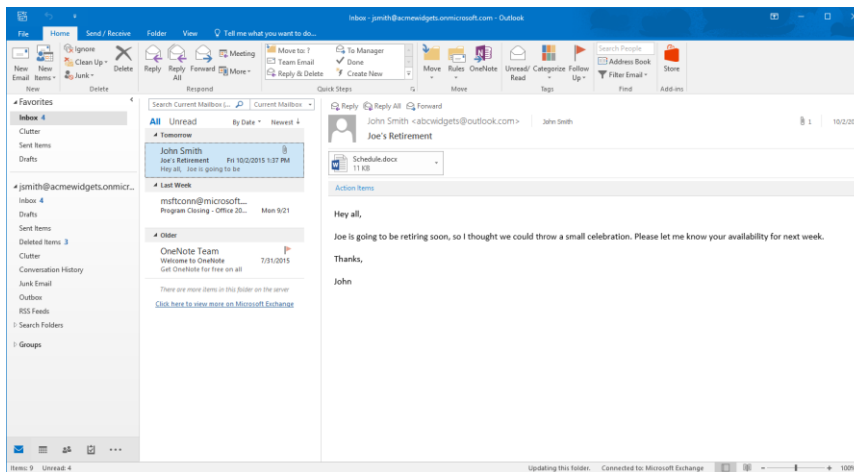
Simply complete and send the message as normal to finish the process.

ACTIVITY 5-2

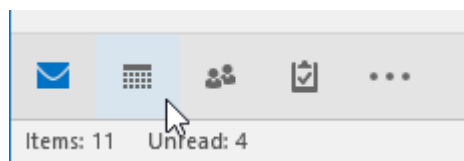
Managing Appointments

You have an upcoming doctor's appointment that you would like to schedule in your calendar.

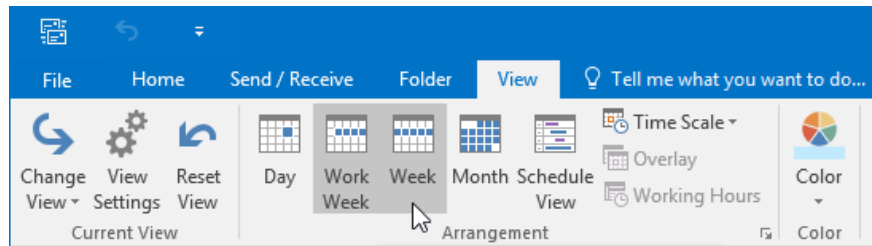
1. To begin, open Outlook 2016:



2. Display the Calendar workspace by clicking the Calendar button in the Navigation pane:

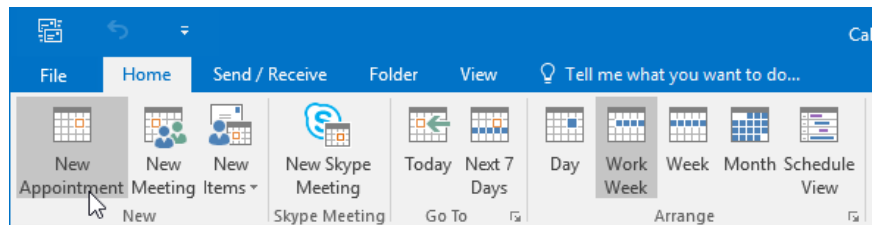


3. If the Week grid arrangement option is not already applied, click View → Week:

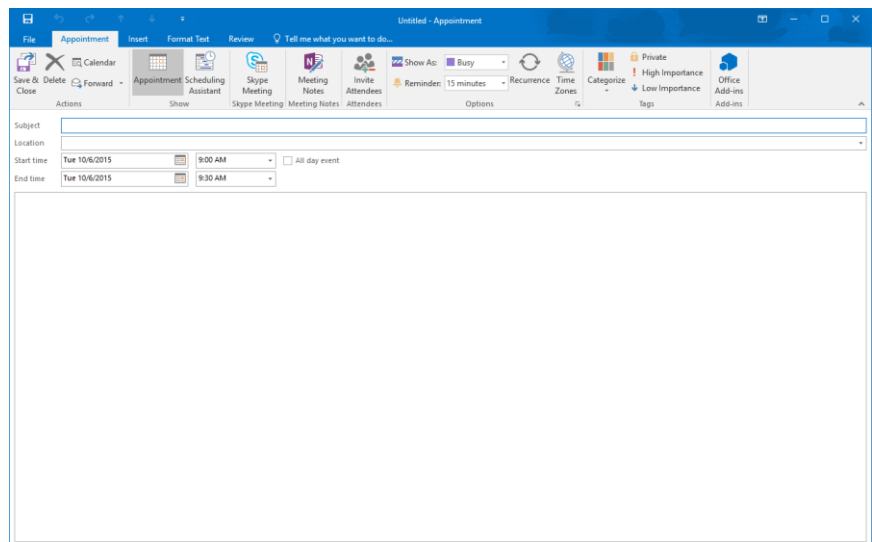


(If this option is already applied, skip to the next step.)

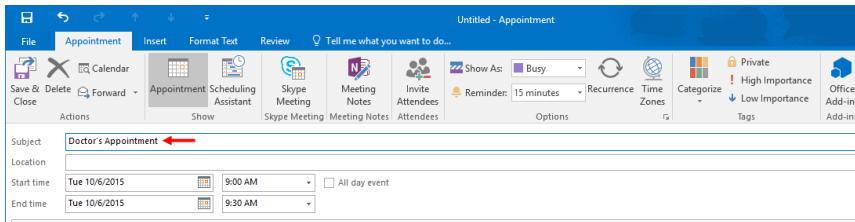
4. Create a new appointment by clicking Home → New Appointment:



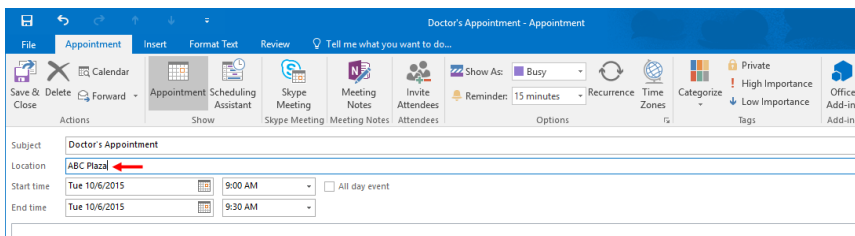
5. The Appointment form will now be displayed:



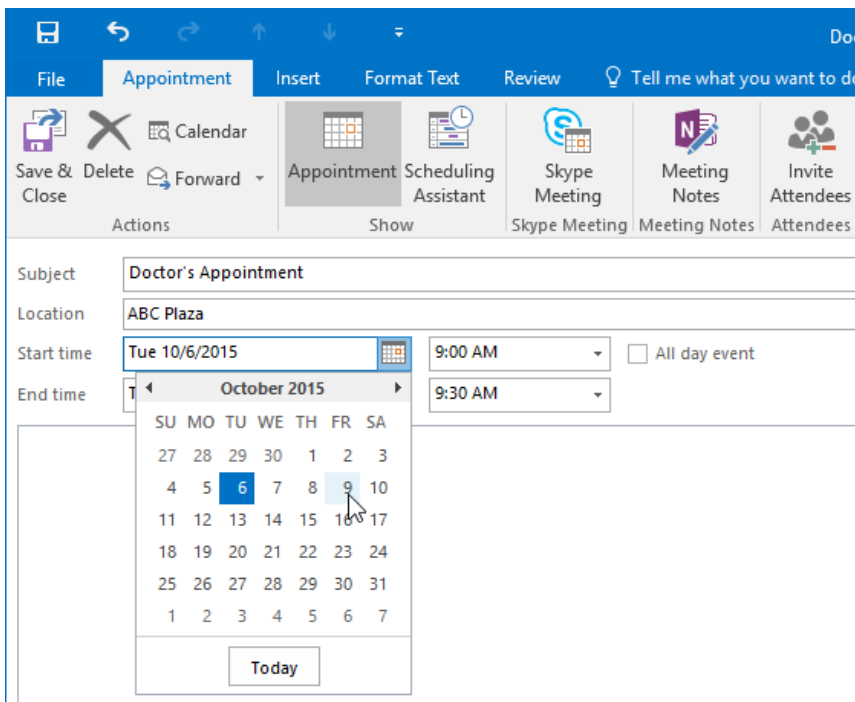
6. Inside the Subject field, type “Doctor’s Appointment:”



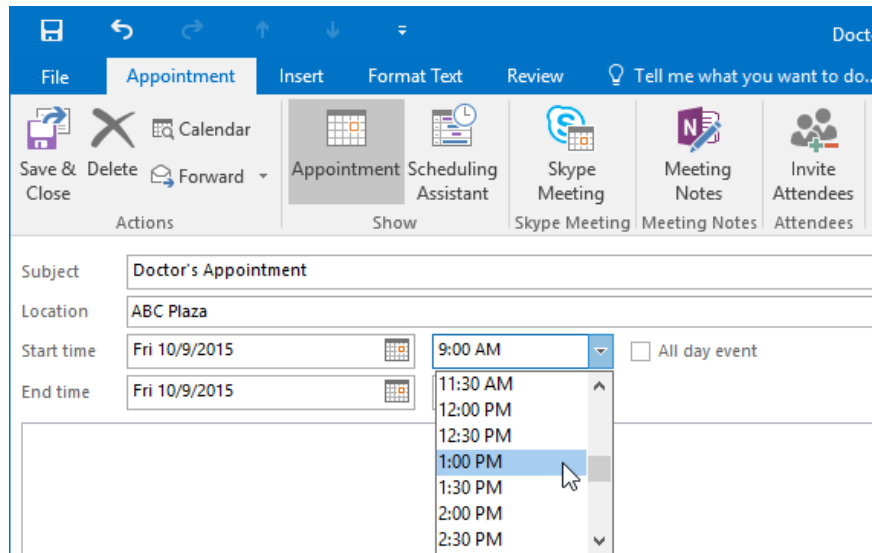
7. In the Location field, type “ABC Plaza:”



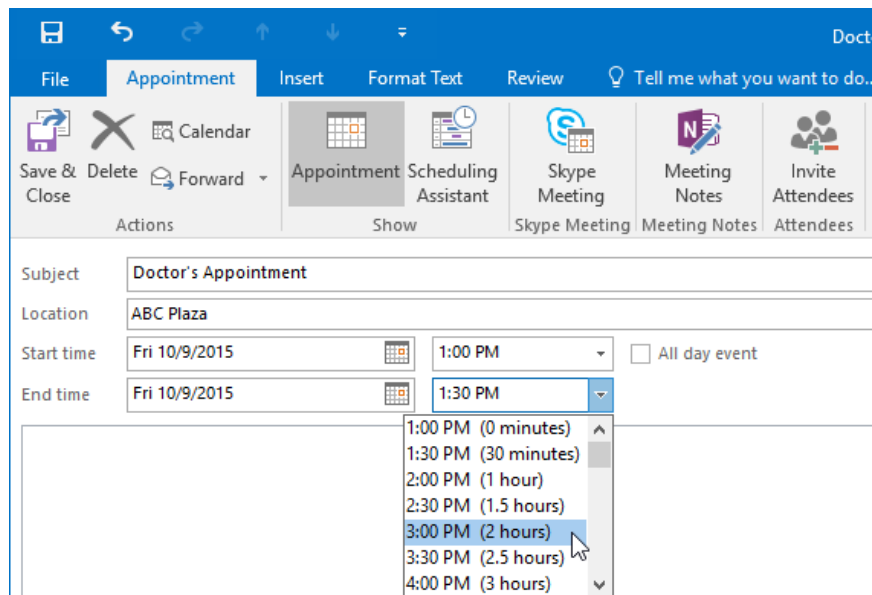
8. From the “Start time” drop-down menu, choose Friday of the current week:



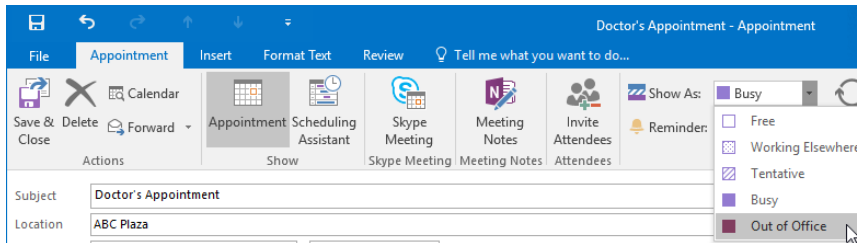
9. Next, choose 1:00 PM as a start time:



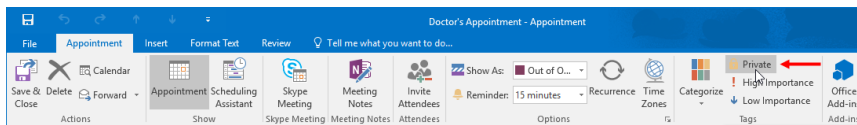
10. Examine the "End time" drop-down menus. You will see that the date now matches the one shown in the "Start time" field. Additionally, the end time has automatically been set to a half hour after the start time. For this example, choose 3:00 PM as an end time:



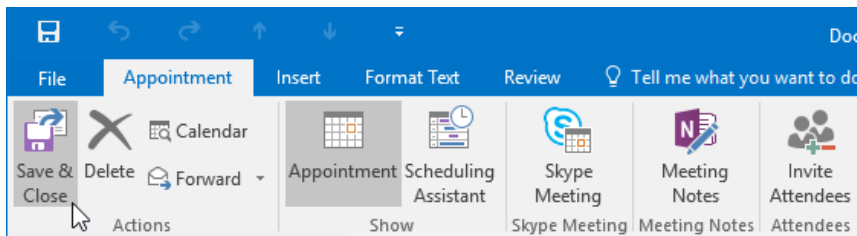
11. As you are going to be out of the office during this period, you need to change the Show As option to reflect that. Click Appointment → Show As → Out of Office:



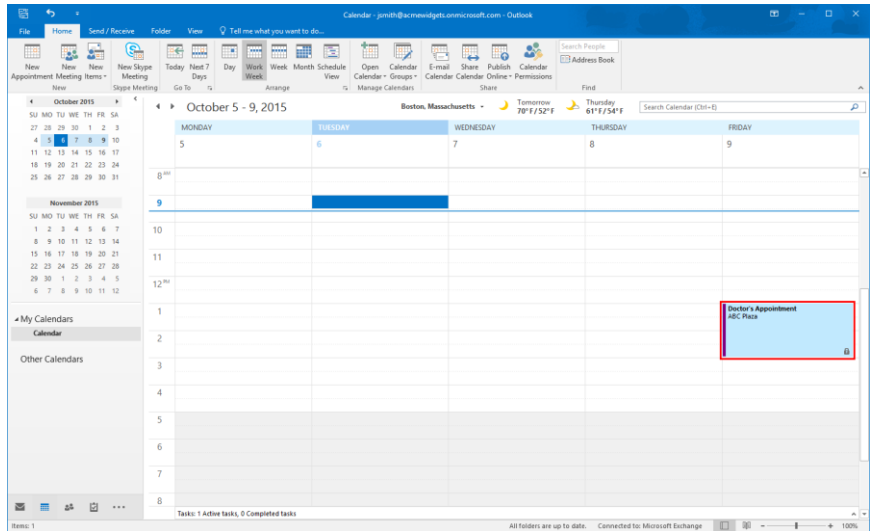
12. Now make this appointment private by clicking Appointment → Private:



13. Click Appointment → Save & Close:



- Returning to your calendar, you will see the new appointment. Note the lock in its lower right-hand corner that designates it as private:



- Close Microsoft Outlook 2016.

TOPIC C: Manage Meetings

Meetings are calendar events that involve other people and (optionally) organizational resources. By using Outlook's calendar to schedule meetings, you are better able to communicate with and manage attendees. Over the course of this topic, you will learn how to manage meetings in Outlook 2016.

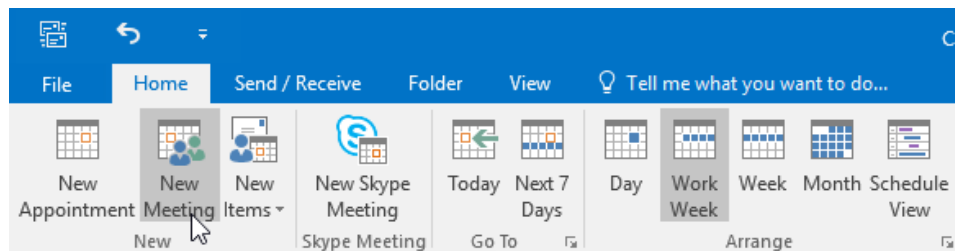
Topic Objectives

In this topic, you will learn:

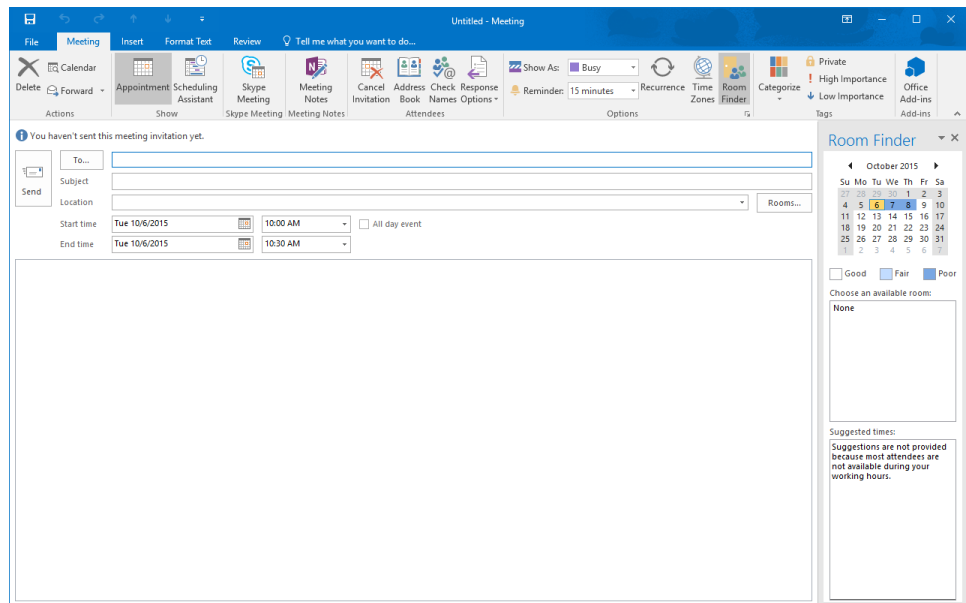
- About the meeting scheduling process
- About the Meeting form
- How to use the Room Finder and the Scheduling Assistant
- How to share meeting notes using OneNote
- About meeting response options
- How to respond to a meeting request
- How to update a meeting request
- How to cancel a meeting request
- How to propose a new time for a meeting

THE MEETING SCHEDULING PROCESS

To schedule a new meeting in your calendar, you must first create and send a meeting request. To do this, click Home → New Meeting while in the Calendar workspace:



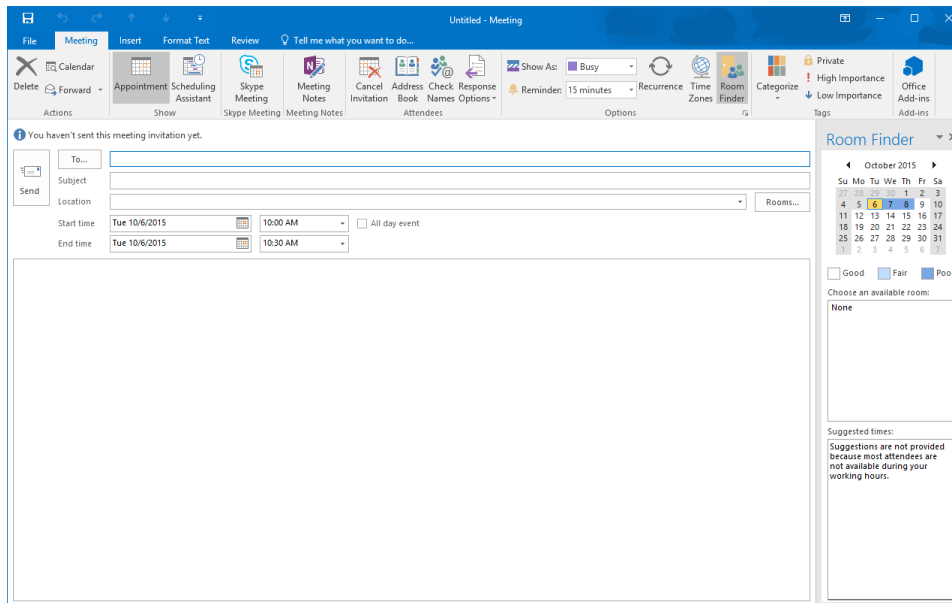
This action will display the Meeting form:



Using the controls in this form, you can then construct the meeting and send a meeting request. The meeting will automatically be added to your calendar (as the organizer). Recipients will then respond to the request and let you know if they are available to attend. If a recipient chooses to accept the invitation, the meeting will appear on their own calendar.

THE MEETING FORM

Upon clicking the New Meeting command on the Home tab or choosing to respond to a message with a meeting request (Message → Meeting), the Meeting form will be displayed in a separate window:



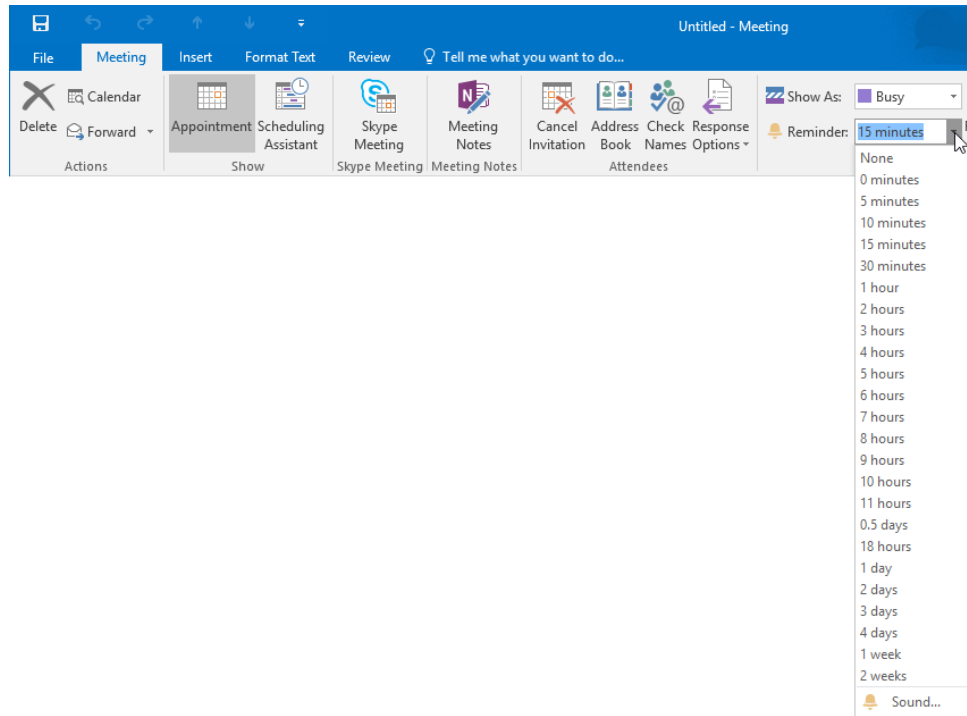
The Meeting form includes a variety of different fields:

- The **To** field allows you to enter the e-mail addresses of the meeting's attendees.
- In the **Subject** field, you can enter a quick description of the meeting that will appear on the calendar.
- In the **Location** field, you can enter where the meeting will take place. (If configured, you may have the option to choose from a selection of available rooms in your organization.)
- The **“Start time”** and **“End time”** menus allow you to choose when the meeting will start and end.
- Additionally, the **“All day event”** checkbox is provided if the event you are adding spans an entire day.
- Inside the **Meeting form body**, you can add more details or notes about the meeting.

Meeting Reminders

Just like appointments, you are able to set reminders for any meetings that you create or agree to attend. While the organizer of the meeting sets the default reminder time, each attendee can modify this option to suit their own preference.

To modify the reminder settings, open the meeting and click Meeting → Reminder → [Reminder Setting]:

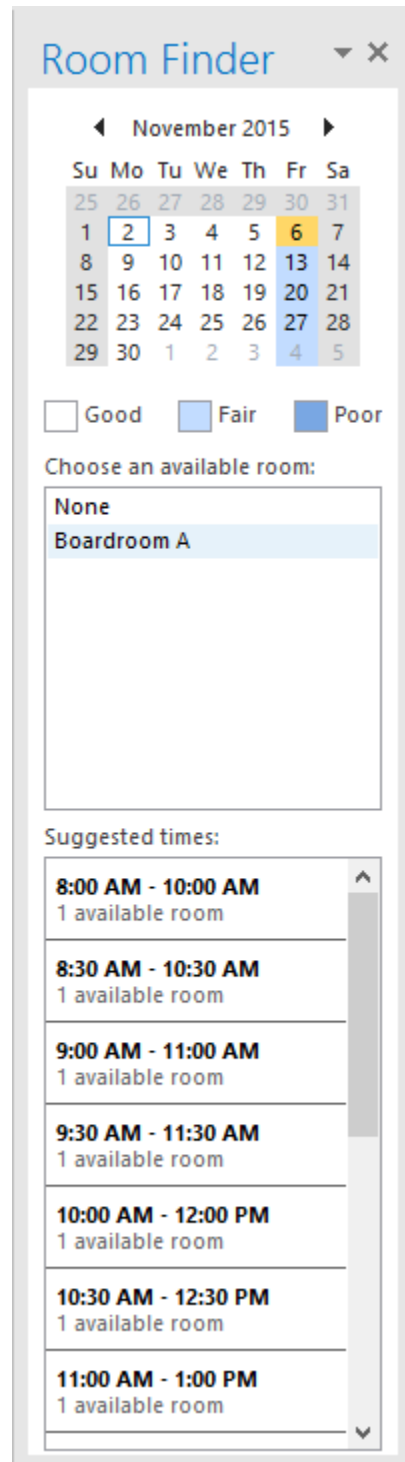


Resource Booking Attendant

The Resource Booking Attendant is used to facilitate any shared resources that your organization may have, including rooms that are used for meetings. It works by automating responses to booking or cancellation requests. Using this system, you are able to set policies that can controls how resources are shared and prevent double bookings. This feature can be enabled by your Microsoft Exchange Server administrator.

THE ROOM FINDER PANE

The Room Finder pane is used to help you find and select an available room for a meeting that you are organizing:

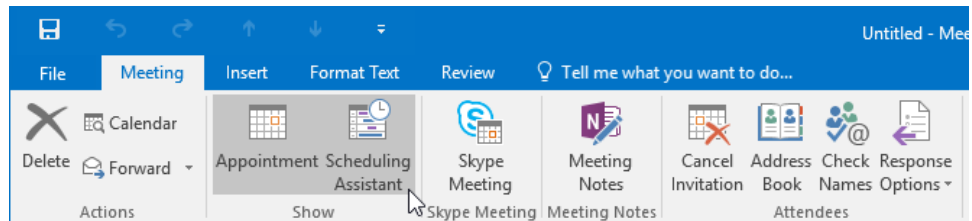


(If this pane is not already displayed, it can be opened by clicking Meeting → Room Finder. As well, you can add meetings to the Room Finder pane if necessary by clicking the Rooms button next to the Location field.)

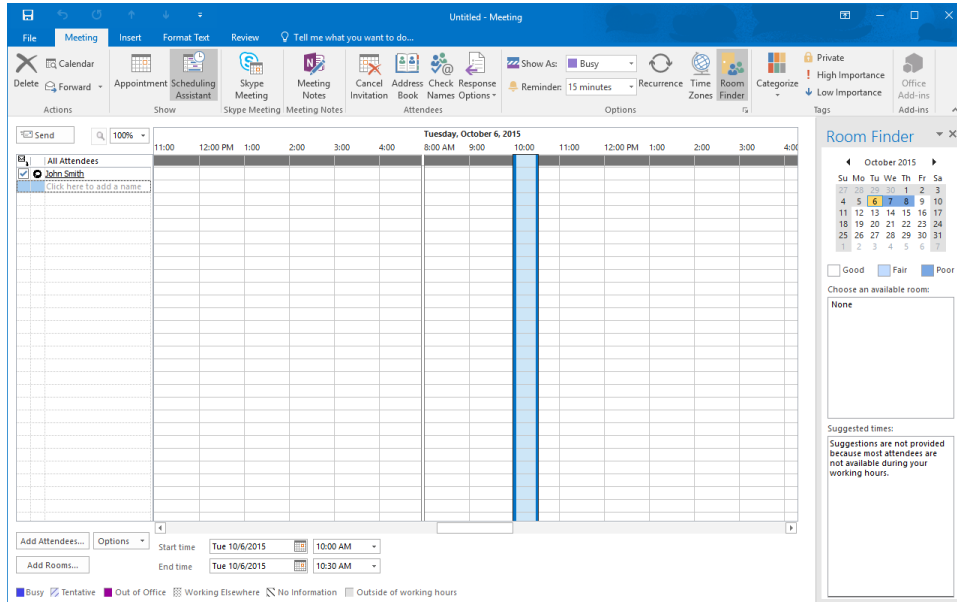
The Room Finder pane will show a calendar with the date of the meeting that you are organizing selected. Below the calendar, you will see any available rooms. The “Suggested times” section includes a list of times for your meeting where all invitees are available. Additionally, it will show you any conflicts that exist between attendees and the selected resource for the currently selected start and end times.

THE SCHEDULING ASSISTANT

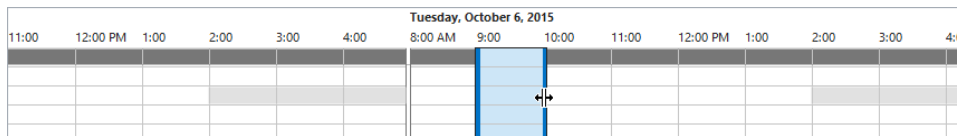
To help coordinate the meeting, the Scheduling Assistant has been provided. To use this feature, first populate the Meeting form with all of the attendees and resources that you require, and set the date when you would like the meeting to take place. Next, click Meeting → Scheduling Assistant:



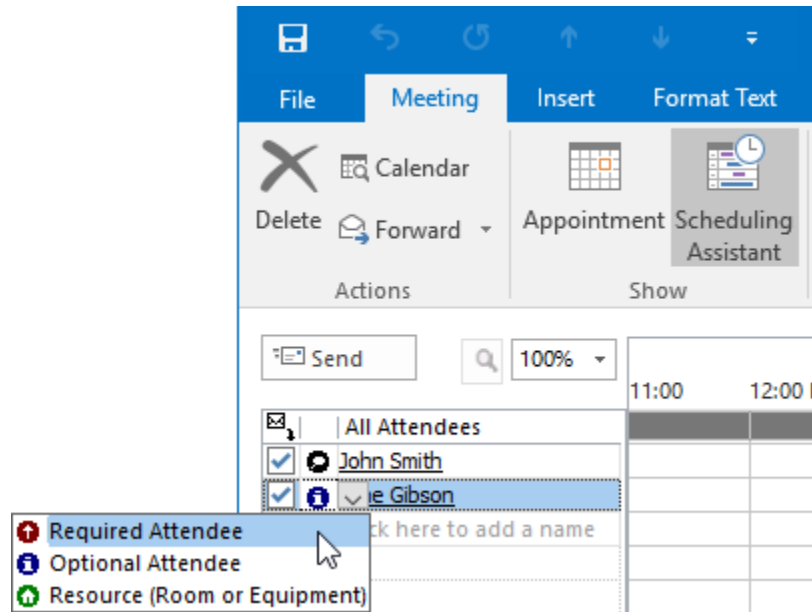
When activated, the Scheduling Assistant will display any conflicts between the availability of your attendees and any resources that you might require. This provides an easy and simple way to coordinate a meeting so that everyone can attend:



To set a time for the meeting, click and drag an area on the grid:

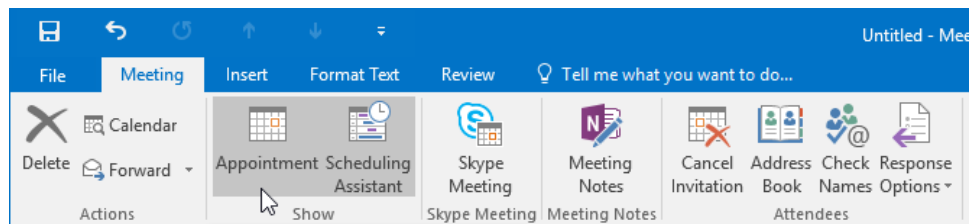


You can also click the Requirement column to choose whether this attendee will be required, optional, or just a resource (such as a room):



Toggle Between Meeting Form Views Using the Show Commands

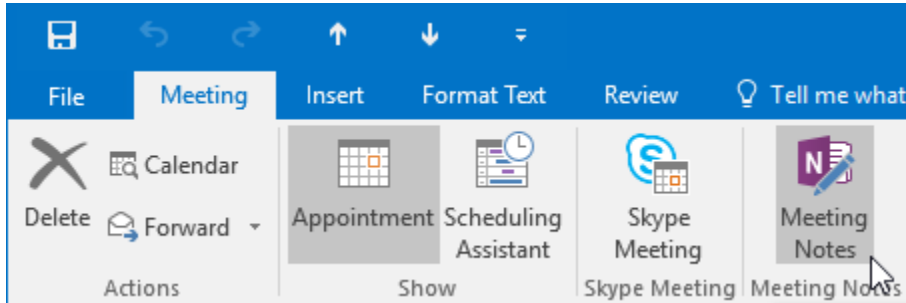
To toggle back to the Meeting form from the Scheduling Assistant, click Meeting → Appointment:



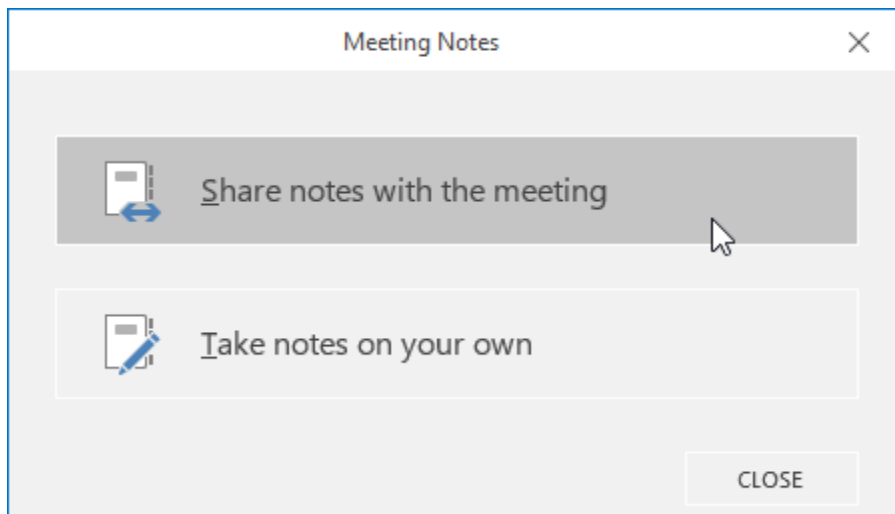
To return to the Scheduling Assistant, click Meeting → Scheduling.

SHARING MEETING NOTES USING ONENOTE

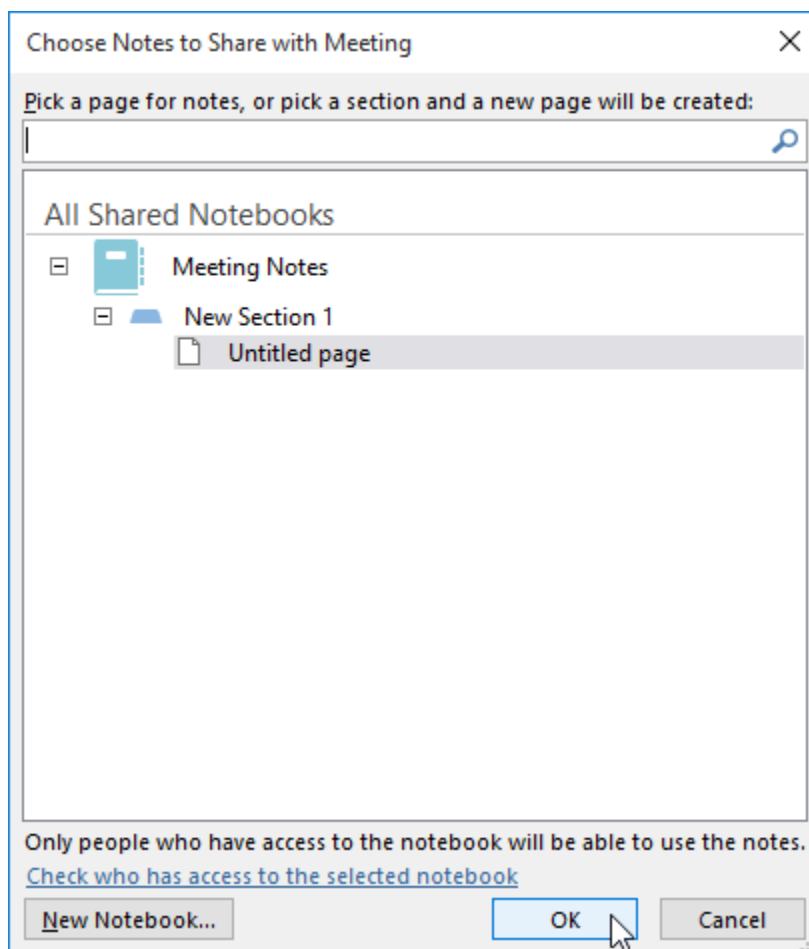
As people commonly take notes during meetings, Outlook offers an easy way to start taking notes with Microsoft OneNote and collaborate with other attendees. To do this, click Meeting → Meeting Notes:



This will display the Meeting Notes pop-up. Click “Share notes with the meeting:”



From there you can choose the OneNote notebook page that you would like to share with the attendees. Click OK once you have chosen a location:

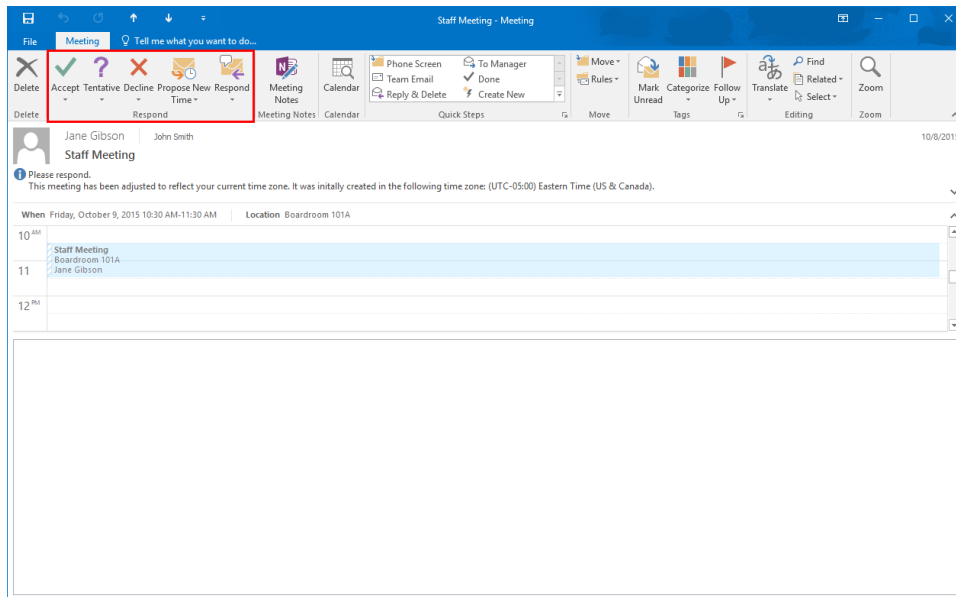


(Remember that the notebook with the page must be in a sharable location, such as your OneDrive account or on SharePoint.)

Now when you send out the meeting invite, the attendees will have a link to your meeting notes.

MEETING RESPONSE OPTIONS

When a meeting attendee receives a meeting request, they will be given the option to respond via buttons above the message in the Reading pane, or in the Meeting tab in the Meeting window:

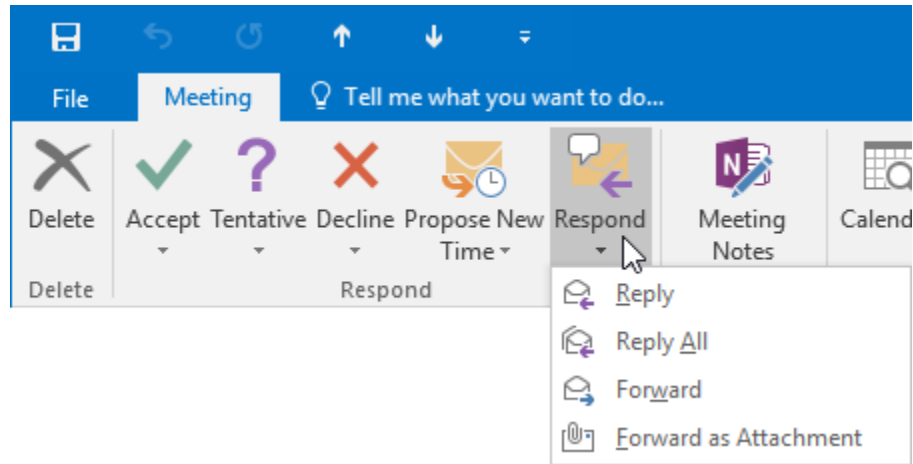


The options are as follows.

- **Accept:** Clicking Accept will add the meeting to your calendar and confirm your attendance. The Accept drop-down button includes options to accept and send a response to the meeting organizer, accept and not send a response, or accept and edit the response.
- **Tentative:** The Tentative option is used when you are not sure that you will be able to attend. Like the other options, you can choose to accept and send a response to the meeting organizer, accept and not send a response, or accept and edit the response.
- **Decline:** If you are unable to attend a meeting, you can choose the Decline option. You have the option to decline and send a response to the meeting organizer, decline and not send a response, or decline and edit the response.
- **Propose New Time:** If you have a scheduling conflict with a meeting request, you can propose a new time that works better for you (if the meeting organizer has enabled this option). Outlook will add the meeting to your calendar using your suggested time. The meeting organizer can then choose to accept or reject your proposal.

Other Response Options

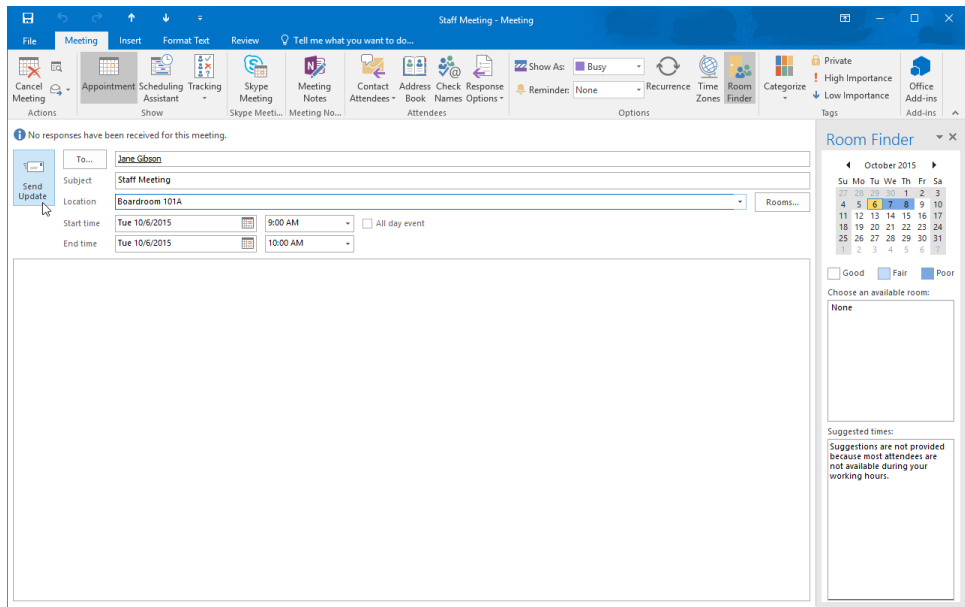
Aside from the basic meeting response options, you also have access to some other options using the Respond drop-down command:



Choosing one of the options under this command will interact with the message as if it were a regular e-mail. It will not respond to the meeting on your behalf.

UPDATING A MEETING REQUEST

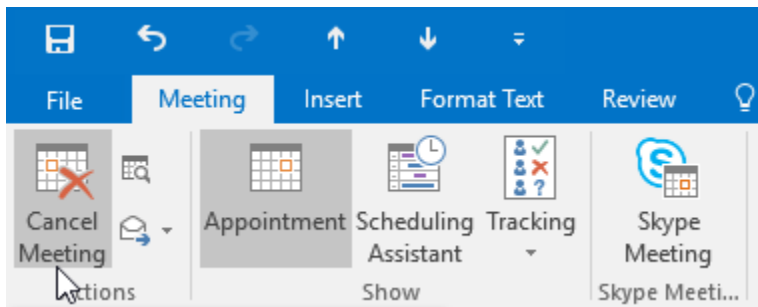
To update a meeting request, first open the meeting by double-clicking its entry in the calendar. From there, you can make any changes that you wish. For example, in this case the time was moved to one hour later than it was when the request was originally sent out:



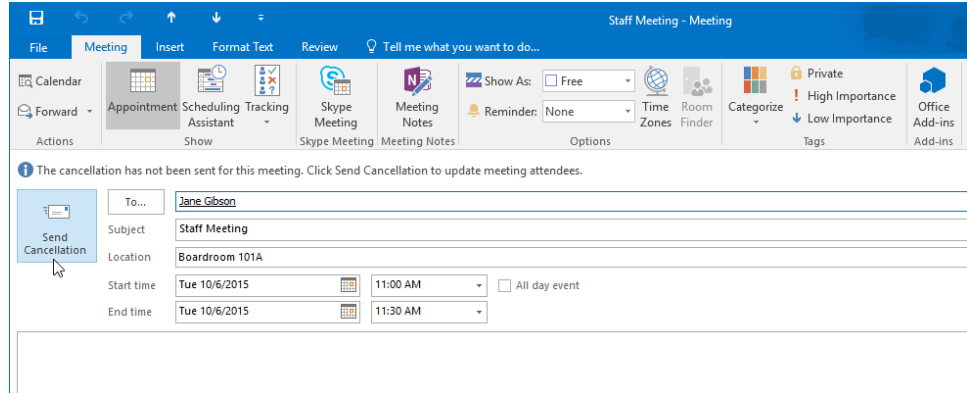
Whenever a change in the meeting has been made, the Send Update button will be shown instead of the Send button. Clicking the Send Update button will send a message to all the meeting participants to inform them of the change and apply that change to their individual calendars.

CANCELLING A MEETING

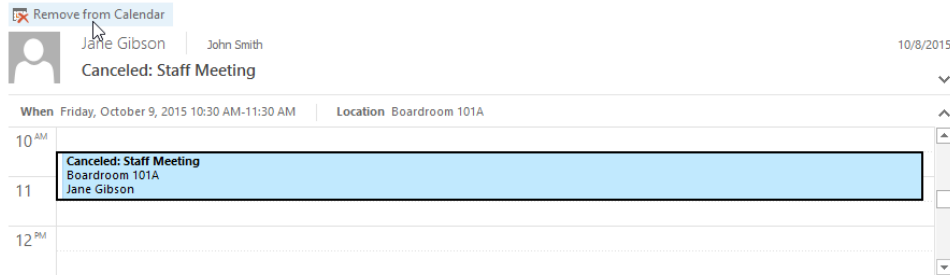
To cancel a meeting that you are the organizer of, first open the meeting. Then, click Meeting → Cancel Meeting:



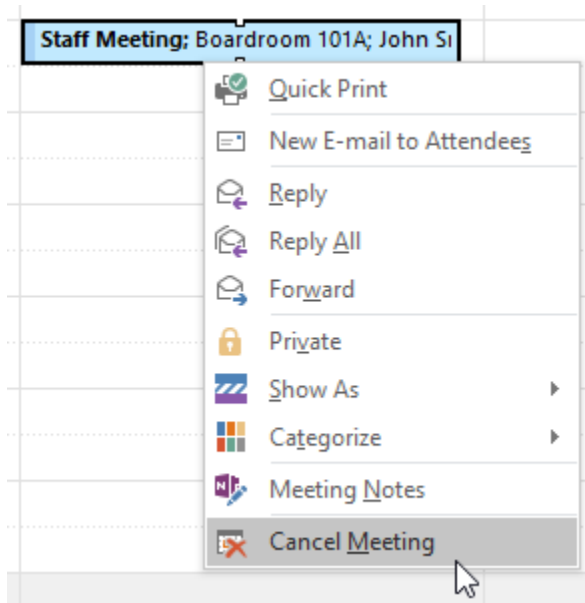
This action will allow you to send a cancellation message to the attendees of the meeting and remove it from your calendar:



When the attendees receive this message, the “Remove from Calendar” button at the top of the message will allow them to remove the meeting from their respective calendars:



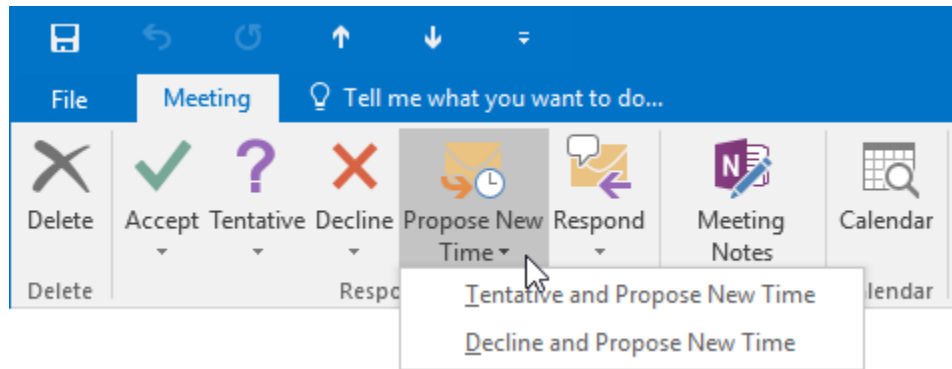
Alternatively, you can cancel a meeting by right-clicking on the meeting directly within the calendar and clicking Cancel Meeting:



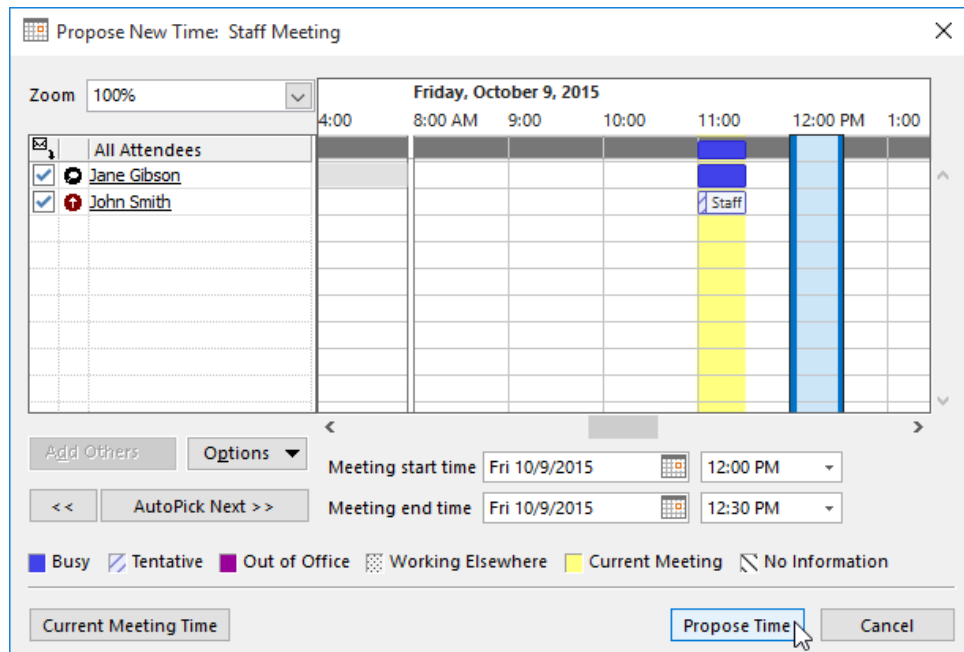
This action will display the Meeting form for the current meeting and allow you to send a cancellation notice.

PROPOSING A NEW TIME FOR A MEETING

If the organizer has enabled this option, you will see the Propose New Time drop-down command at the top of the meeting request in the Reading pane or on the Meeting tab:

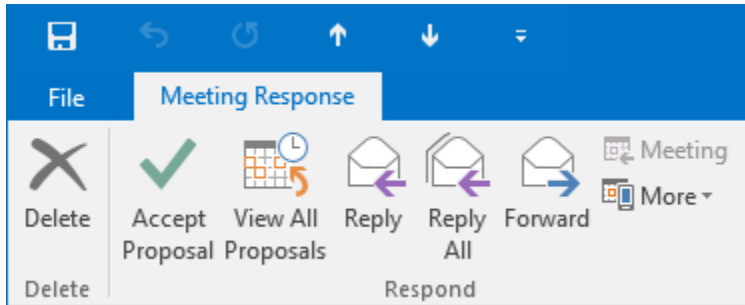


Clicking this drop-down command will give you the option to tentatively accept the meeting time and propose a new time, or decline the meeting request and provide a new proposed time. Clicking either option will display the Propose New Time dialog box:



Here, you will be able to see the schedules of all the invitees and choose a new time that you think would work better. Then, click Propose Time to send the request.

Once the organizer receives and views this message, they can then choose to accept the proposal or delete the message to reject it:

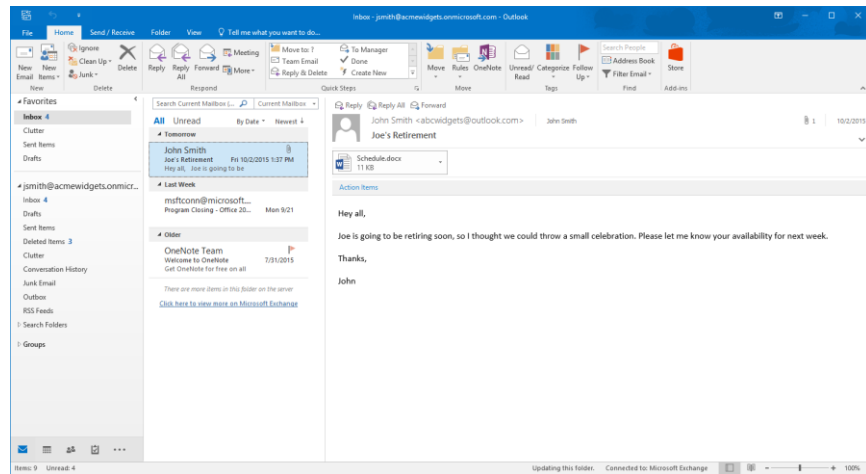


ACTIVITY 5-3

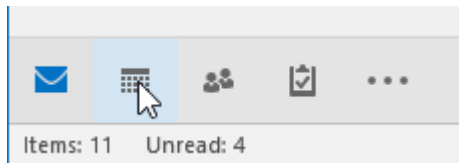
Creating and Managing Meetings

You have been asked to organize a meeting to go over the details of an upcoming project. This meeting needs to be held sometime next Monday. Students should pair up with another classmate for this activity and have access to a Microsoft Exchange Server or Office 365 e-mail account.

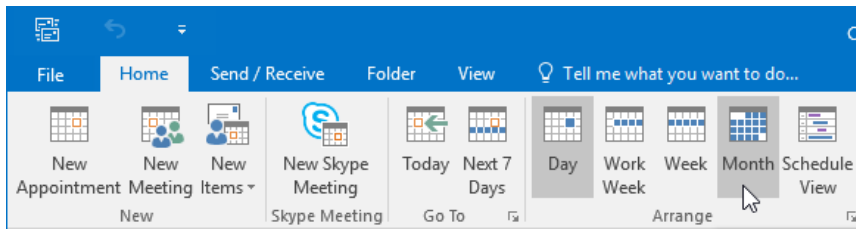
1. To begin, open Outlook 2016:



2. Display the Calendar workspace by clicking the Calendar button in the Navigation pane:

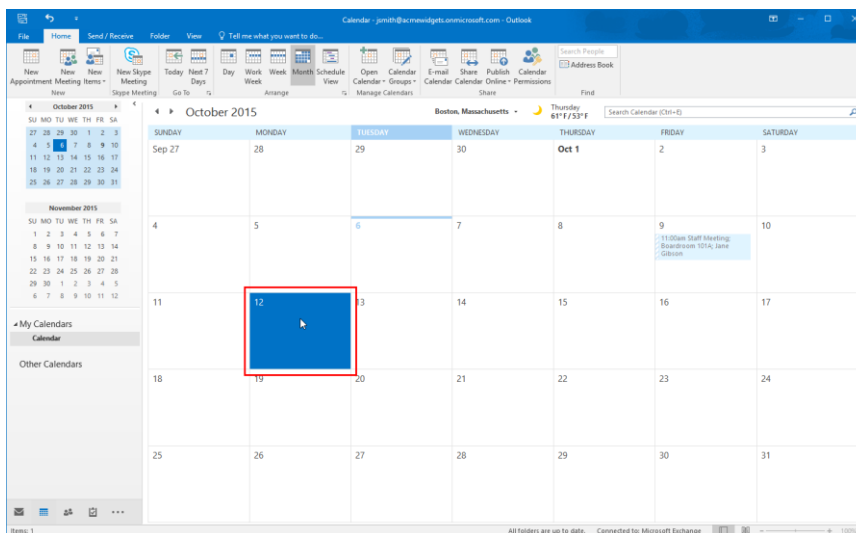


3. Apply the Month calendar grid arrangement by clicking Home → Month:

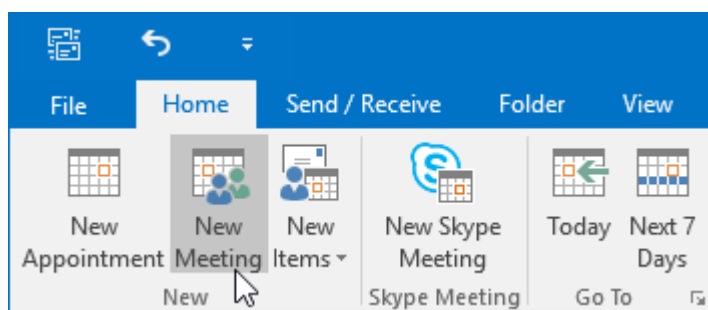


(If this view is already applied, skip to the next step.)

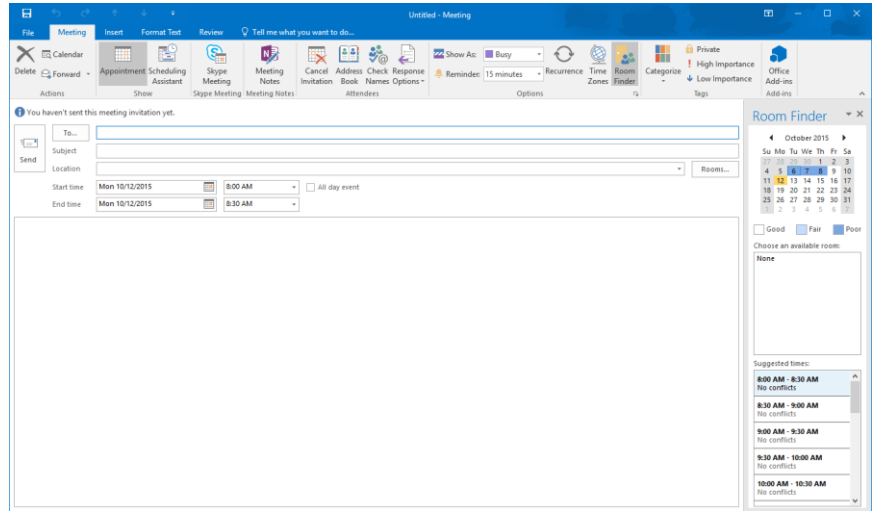
4. You will now see the calendar for the current month. Click to select the next Monday in the calendar:



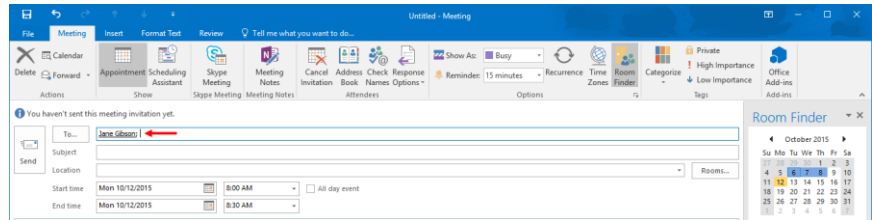
5. Click Home → New Meeting:



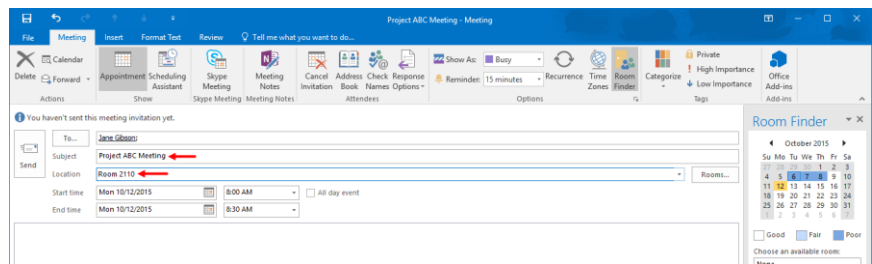
6. The Meeting form will now be displayed:



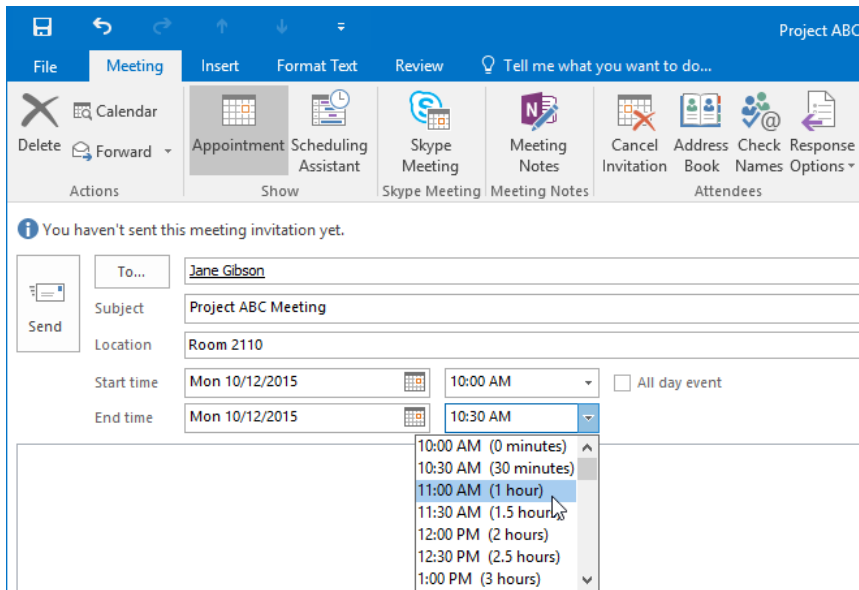
7. Inside the To field, type the e-mail address of your partner, whom you are inviting to the meeting:



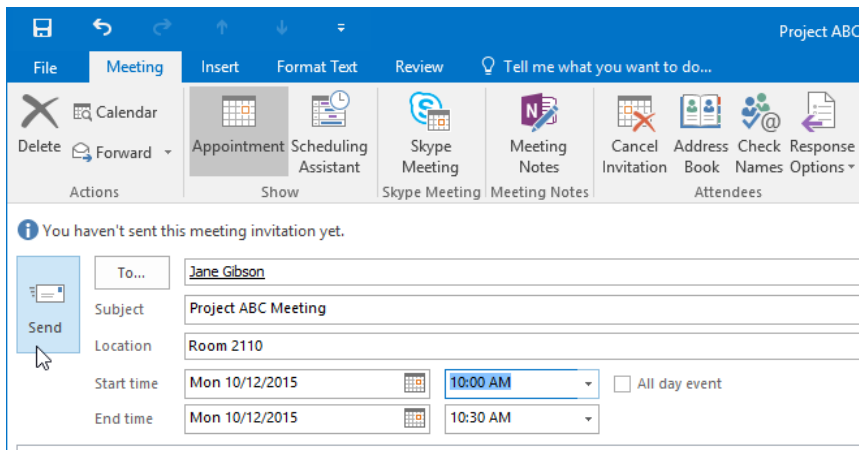
8. In the subject field, type “Project ABC Meeting.” In the Location field, type “Room 2110:”



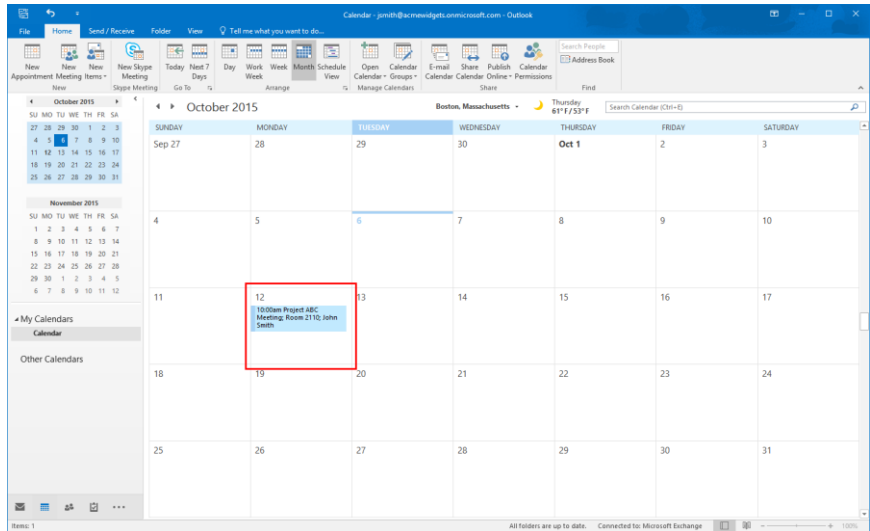
9. Ensure that the date is the one that you selected previous to opening the Meeting form. Then, set the “Start time” drop-down menu to 10:00 AM and the “End time” drop-down menu to 11:00 AM:



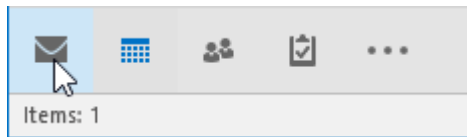
10. With the meeting now configured, click the Send button:



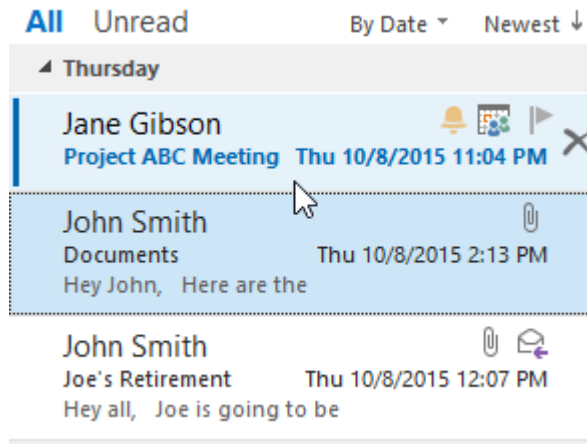
- 11. Back at your calendar, you will see the new meeting that you are organizing appears as an entry on the currently selected date:



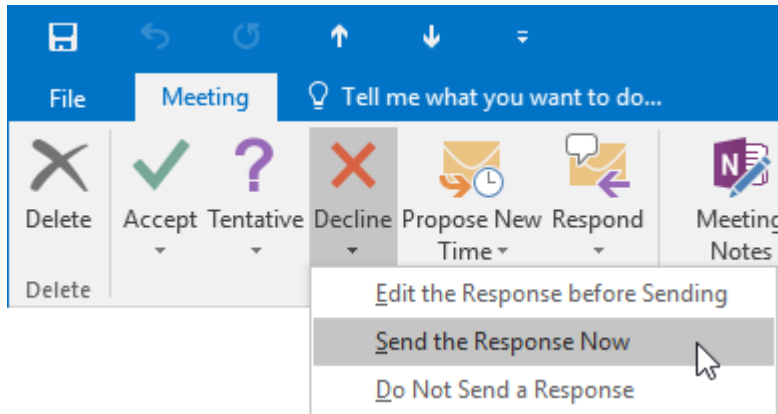
- 12. Return to the Mail workspace by clicking the Mail button in the Navigation pane:




- 13. The meeting request that your partner sent should now be displayed within your inbox. Double-click it to open it:



14. Review this information. You will see that it conflicts with the meeting request that you already sent out. Click Meeting → Decline → Send the Response Now:



15. Your partner will receive a message that you declined the meeting request. Additionally, you will receive a message that your partner also declined your own meeting request:

Thu 10/8/2015 11:07 PM
Jane Gibson
Declined: Project ABC Meeting
When Monday, October 12, 2015 10:00 AM-10:30 AM (UTC-08:00) Pacific Time (US & Canada).
Location Room 2110
 Jane Gibson has declined this meeting.

16. Close Microsoft Outlook 2016.

TOPIC D: Print Your Calendar

As the calendar in Outlook 2016 becomes a more important component in your day-to-day workflow, you may find the need to print a hard copy of it for reference. Over the course of this topic, you will learn about the various styles that you can use to print your calendar.

Topic Objectives

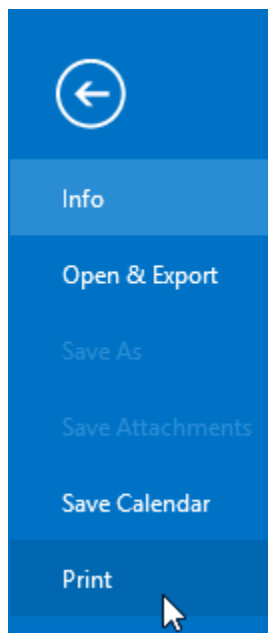
In this topic, you will learn:

- About calendar print styles

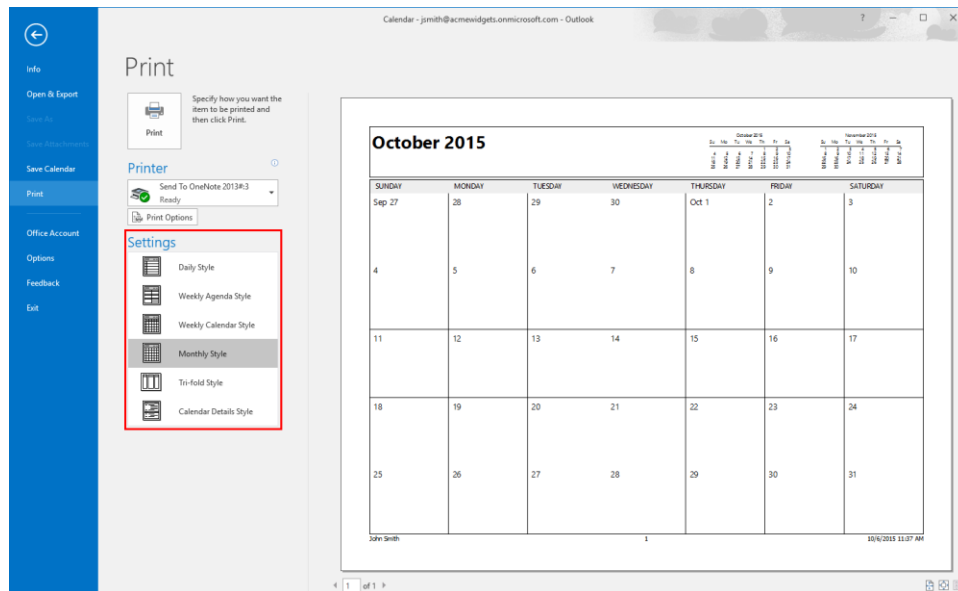
CALENDAR PRINT STYLES

While the process of printing your calendar is relatively straightforward, you do have several different print styles to choose from. These print styles control the amount of detail that is included for each event, as well as how your calendar will appear on the printed page.

To print your calendar, display the Calendar workspace and then click File → Print:



Within the Print category of Backstage view, the Settings section will include all of the various style options that you can choose from:



Below is a breakdown of what each print style will look like:

- **Daily Style:** Selected by default, the Daily Style will print all of the events for the current day. It divides the day into hourly time slots that are further divided into 30 minute rows. It also includes both the Daily Task List and an area for notes.
- **Weekly Agenda Style:** This style will display all of the events for the current week with each day of the week having its own area. Any events that are listed include its subject, start and end times, and location.
- **Weekly Calendar Style:** The Weekly Calendar Style will also display all of the events for the current week, but it will do so using a column for each day with each column divided into hourly time slots. Events that are listed include the subject, start and end times, and location.
- **Monthly Style:** The Monthly Style prints the current month out like a regular wall calendar. The days of the month are divided into a grid. Any events include the subject, start and end times, and location.
- **Tri-fold Style:** The Tri-fold Style is a three-paneled view that includes an agenda for the current day, a daily task list, as well as a grid for all of the days of the current week.

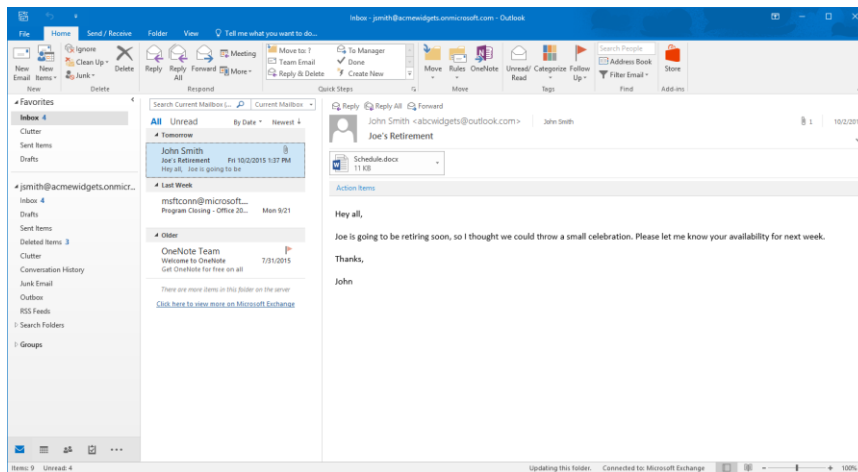
- **Calendar Details Style:** This style is similar to the Daily Style but will only print the events and their details that occur on the selected day. All of the information about the event is included.
- **Memo Style:** This style is only available if an event is selected within your calendar before you perform the Print command. This option will print all of the details of the selected event.

ACTIVITY 5-4

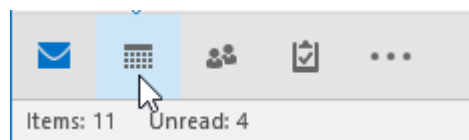
Printing Your Calendar

For quick reference, you would like to print your calendar for the current work week and post it in your office. A printer is required for this activity.

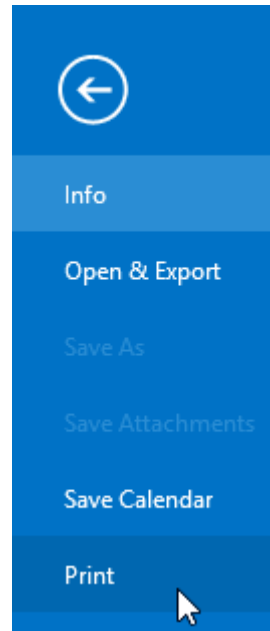
1. To begin, open Outlook 2016:



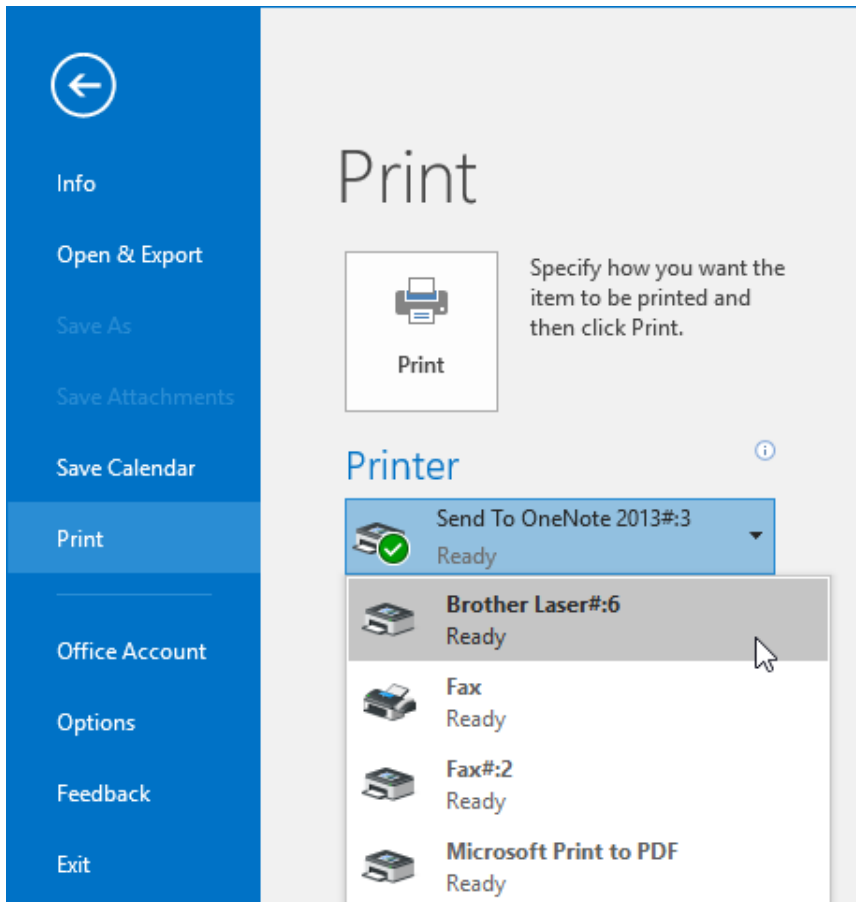
2. Display the Calendar workspace by clicking the Calendar button in the Navigation pane:



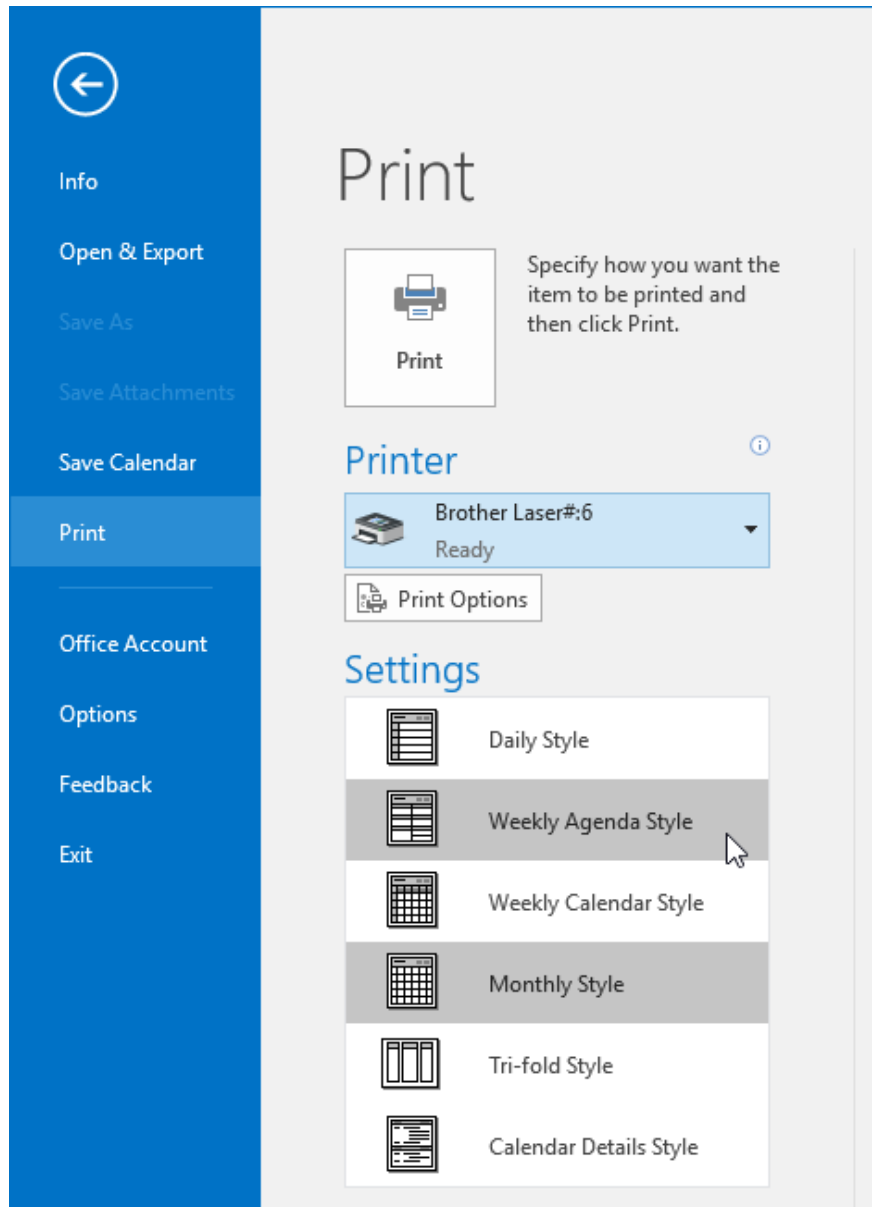
3. Click File → Print:



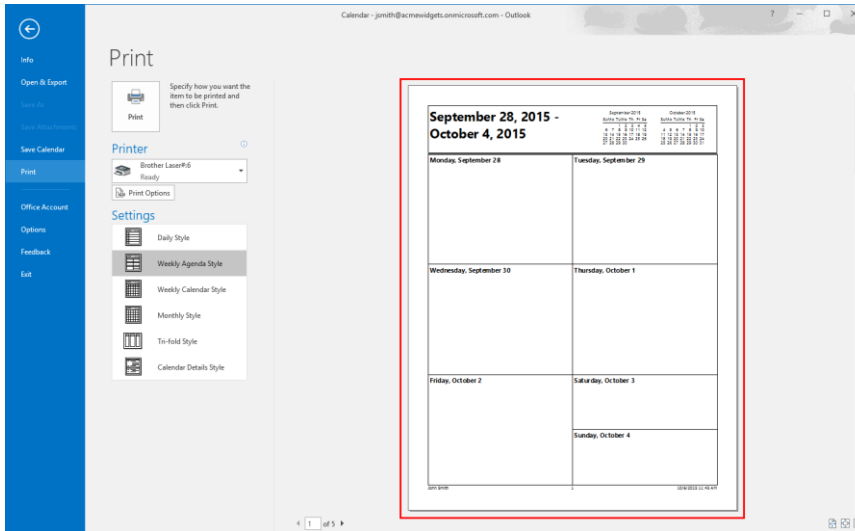
4. Click the Printer drop-down menu and choose the printer that you would like to print your calendar to:



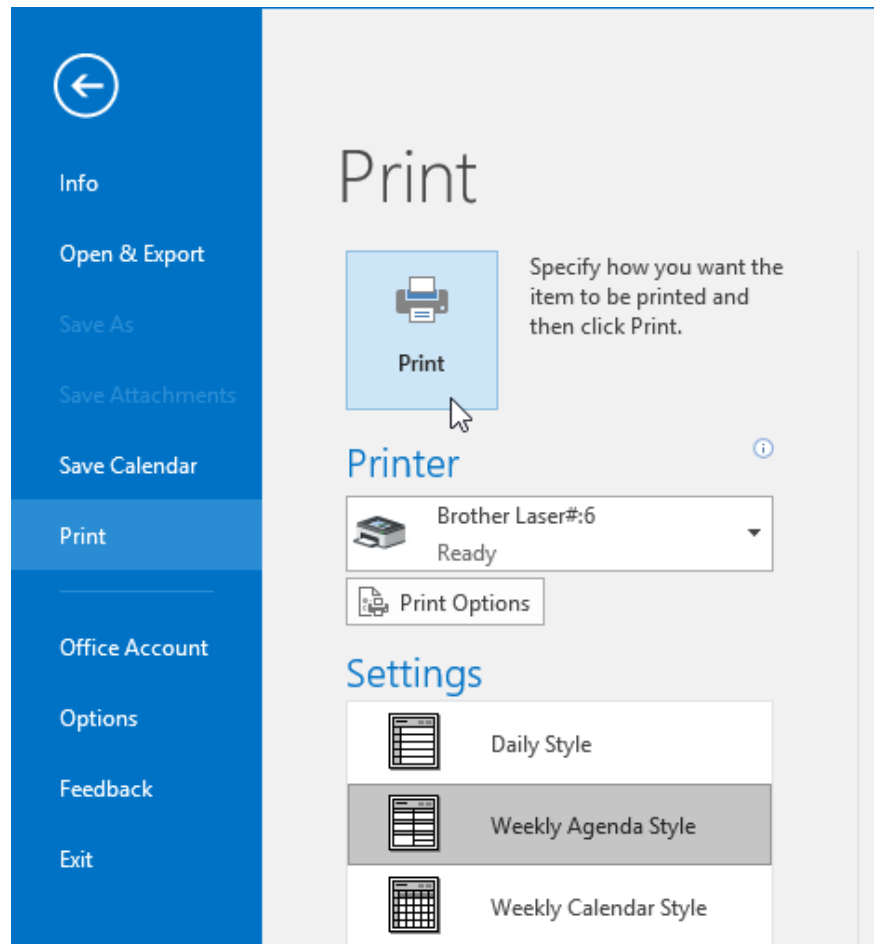
5. Next, you need to choose the calendar print style you would like to use. For this example, click Weekly Agenda Style:



6. Examine the print preview portion of the screen. You will see how your calendar will appear on the printed page:



7. Click Print:



8. A copy of your calendar in the Weekly Agenda Style will now have been printed to the printer that you specified. Close Microsoft Outlook 2016.

Summary

During this lesson, you learned about the many ways that you can manage your calendar and add both appointments and meetings. You should now feel comfortable working with the different types of calendar grid arrangements that are available, as well as adding and managing both appointments and meetings. You should also feel comfortable printing your calendar using a variety of different calendar print styles.

REVIEW QUESTIONS

1. **What are the five calendar views?**
2. **What is the default reminder for an appointment or meeting?**
3. **What is the keyboard shortcut to search your calendar?**
4. **What options are available when you propose a new time for a meeting request?**
5. **What print style would you choose if you wanted to show your tasks, daily timetable, and weekly schedule all on the same page?**

LESSON 6: MANAGING YOUR CONTACTS

Lesson Objectives

In this lesson you will learn how to:

- Create and update contacts
- View and organize contacts

TOPIC A: Create and Update Contacts

As the core functionality of Outlook 2016 revolves around communication and interaction with other people, saving and managing contact information is very important. Over the course of this topic you will learn all about contacts in Outlook 2016, including how to manage them and how to import them from other sources.

Topic Objectives

In this topic, you will learn:

- About contacts
- About the People workspace
- About the Contact form
- How to link notes to a contact
- Techniques for tagging contacts
- About secondary address books
- How to import, forward, and delete contacts

CONTACTS

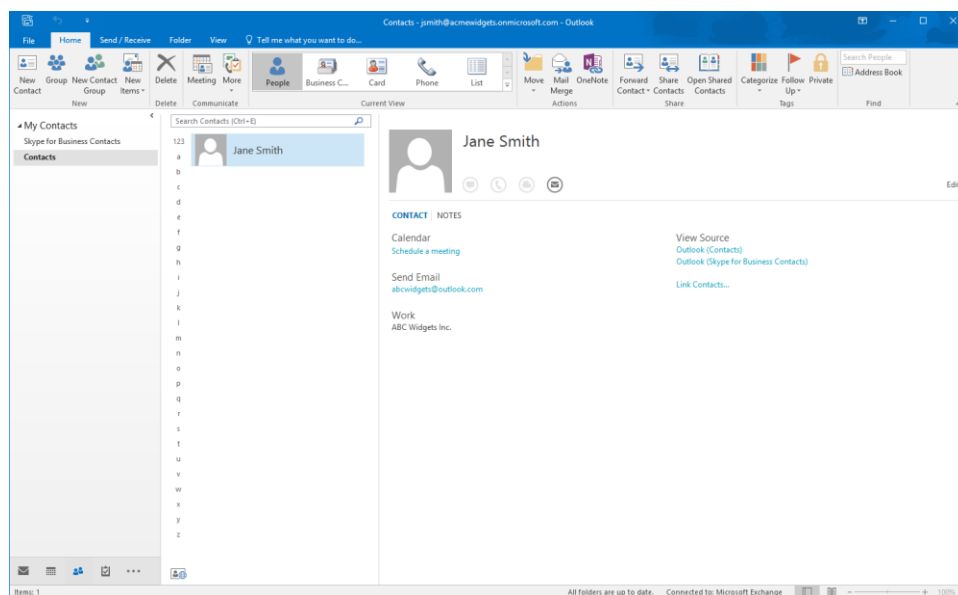
In Outlook 2016, the term “**contact**” is used to describe any individual whom you need to communicate, or have communicated, with. Just like a hard copy address book, Outlook contacts include the contact’s name, address, phone numbers, e-mail address(es), and other details like their job title and even photos. While Outlook 2016 is able to automatically create suggested contacts based on messages you send to recipients who are not already a contact, you also have the option to create contacts manually.

To view, create, and manage contacts in Outlook 2016, display the People workspace by clicking the People button in the Navigation pane:



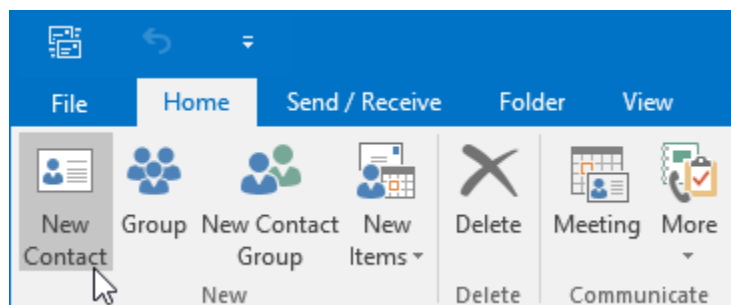
THE PEOPLE WORKSPACE

When the People workspace is displayed, you will see the ribbon, Folders pane, working area, and Reading pane. Inside the working area, you will see a list of contacts. The details for the selected contact will be displayed in the Reading pane:



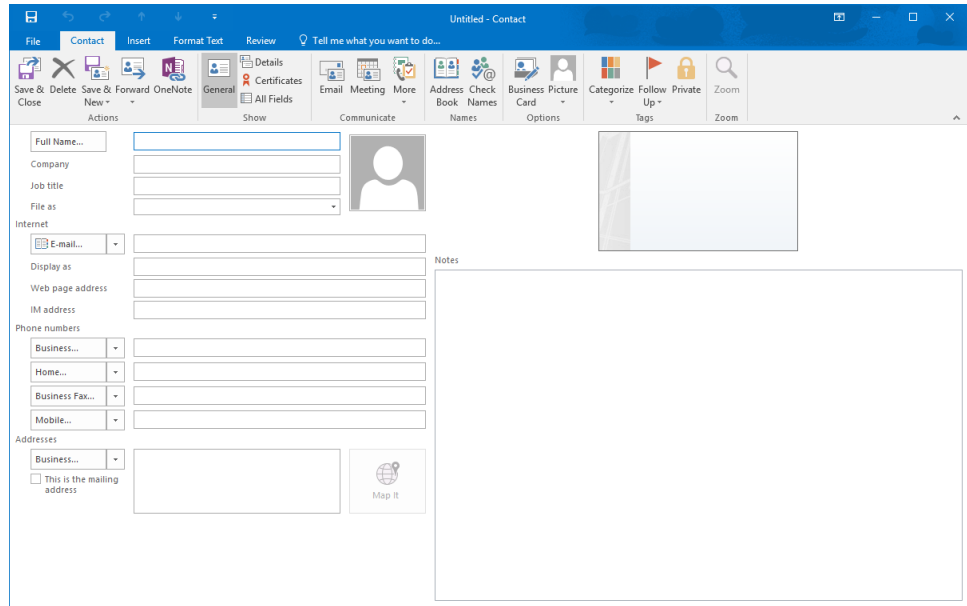
THE CONTACT FORM

Contacts are created and managed using the Contact form. To create a new contact using the Contact form, click Home → New Contact (while in the People workspace):



(If you are not in the People workspace, click Home → New Items → Contact.)

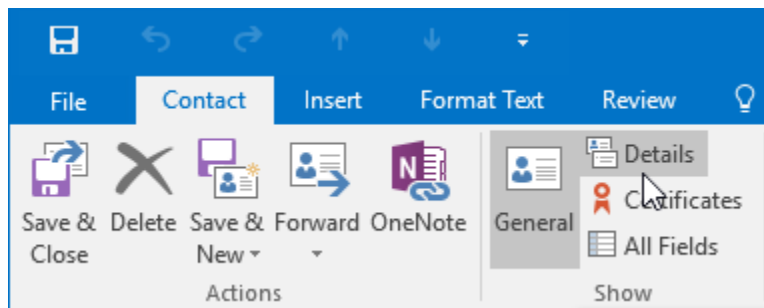
The Contact form will open, and you will see a variety of different fields to add the details about the new contact:



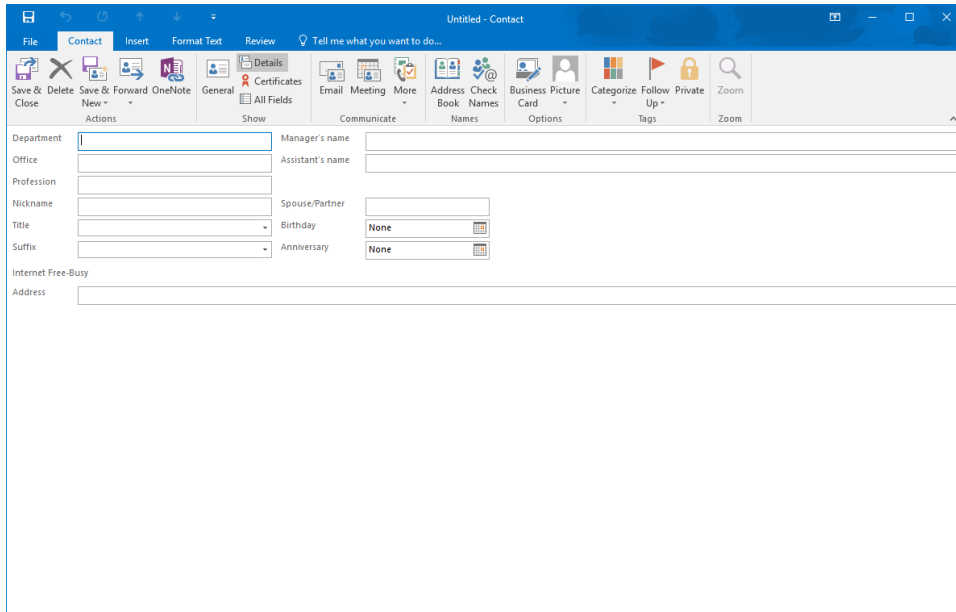
Keep in mind that you do not need to fill out every field. Only the Full Name field is required to save the contact.

The Details Command on the Contact Form

There are even more fields in the Contact form that are available by clicking Contact → Details:



With this command, the Details section will be displayed with additional fields that you can fill out:



Click the General command on the Contact tab to return to the normal view.

If you need to edit the contact later on, just double-click it from the People workspace. A condensed version of the Contact form will appear:

The screenshot shows a contact editing window for 'Darryl Durkin'. The window has a close button (X) in the top right corner. On the left, there is a placeholder for a profile picture. The main content area is divided into two sections: 'CONTACT' (selected) and 'NOTES'. Under 'CONTACT', there are several fields with expandable sections:

- Name:** Darryl Durkin
- Email:** dar.durki@example.org
- Phone:** (555) 422-3942
- IM:** (empty)
- Work:** Company: Metaldyne Corporation
- Address:** (empty)
- IM:** (empty)
- IM:** (empty)

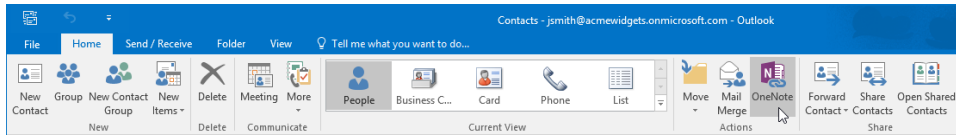
 On the right side, there is a section 'Changes Saved To' with the value 'Outlook (Contacts)'. At the bottom right, there are 'Save' and 'Cancel' buttons. A small ':.' icon is visible in the bottom right corner of the window frame.

Simply make your changes and click Save (which will become available once the contact is edited).

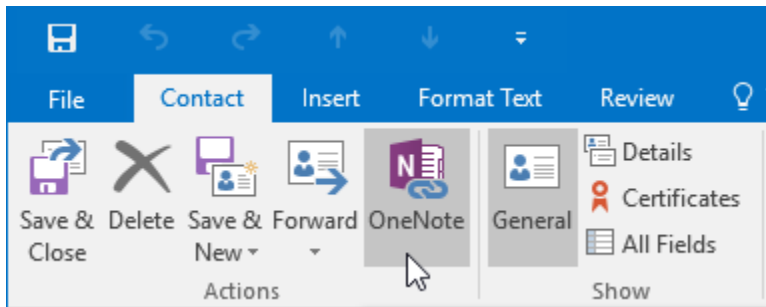
LINKING CONTACT NOTES TO A CONTACT

Contact notes can be generated in Microsoft OneNote automatically. They will include basic information about a contact, such as their name, contact information, and details.

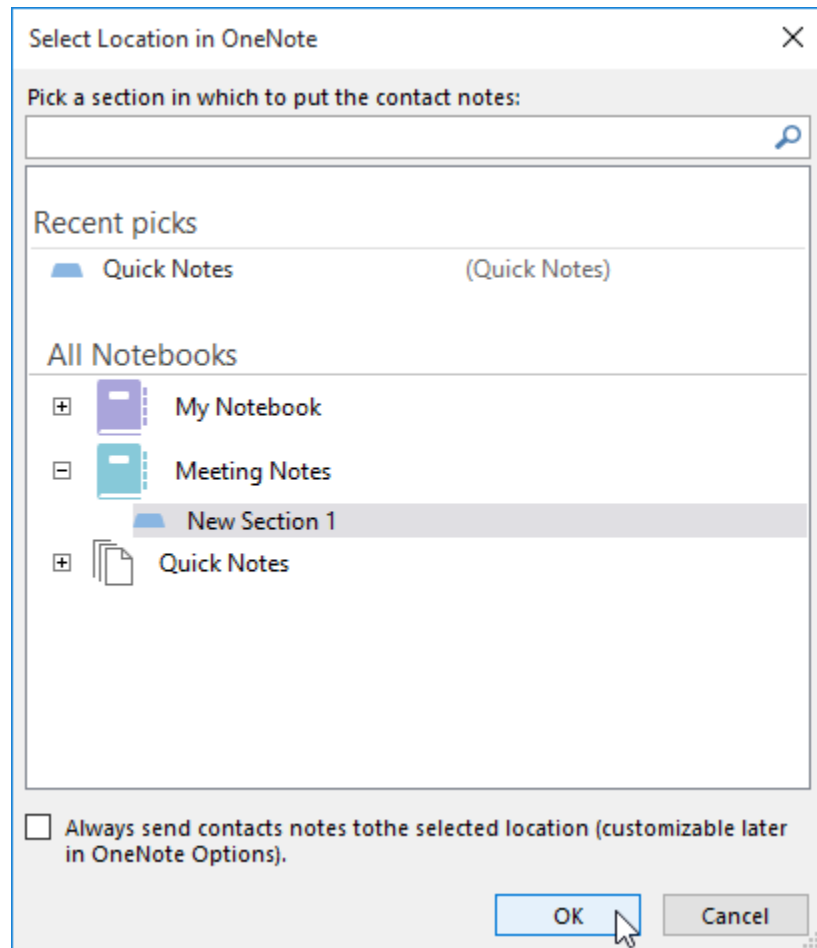
If you would like to create and link a page of notes to a specific contact in the People workspace, select the contact and click Home → OneNote:



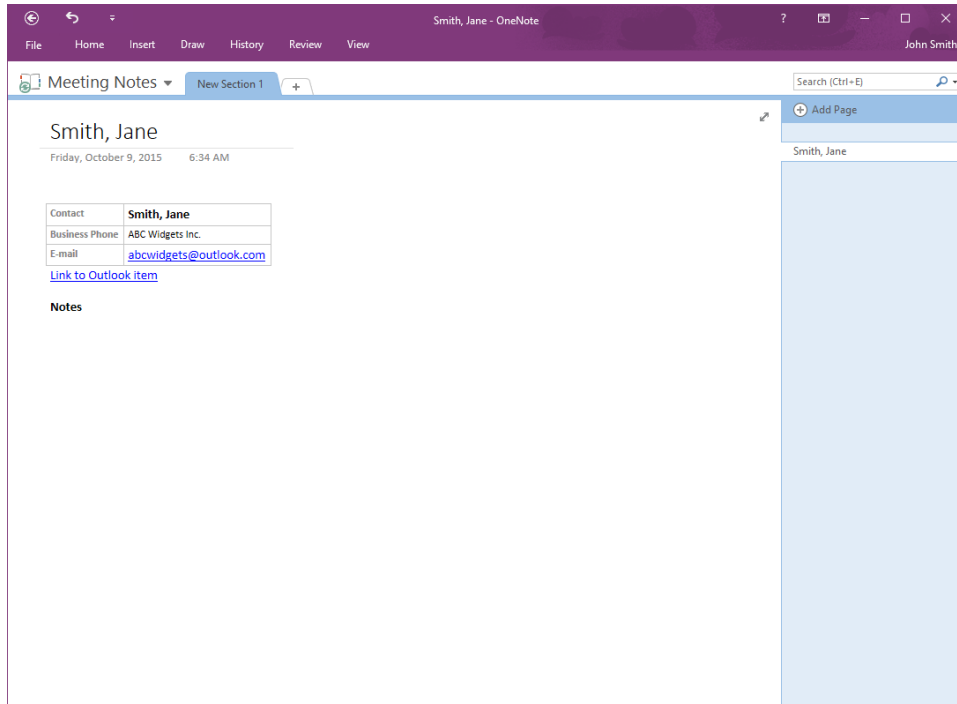
If you have the contact open in the Contact window, click Contact → OneNote:



In either case, the Select Location dialog box will be displayed. Here, you can choose the notebook and section in which you want the contact notes to be placed:



Once you click OK, the contact notes will be created and displayed in Microsoft OneNote:



These notes will now be linked to the contact, so they will be updated if the details of the contact change. Additionally, they can be accessed directly by clicking the OneNote command in either the People workspace or with the Contacts window open.

TAGGING CONTACTS

Like other Outlook objects, you are able to tag contacts to help group them together and keep yourself organized. You can find all of the tagging options within the Tags group of the Home tab while the People workspace is displayed:



Let's break down each option:

- **Categorize:** This drop-down command will allow you to categorize a selected or open contact. These categories can then be customized.
- **Follow Up:** In the same way as when used for messages, the follow-up flag reminds you to follow up with a contact by a specified deadline (today, tomorrow, this week, next week, etc.).
- **Private:** By tagging a contact as private, you can hide the details of this contact from anyone who is able to view your contacts list.

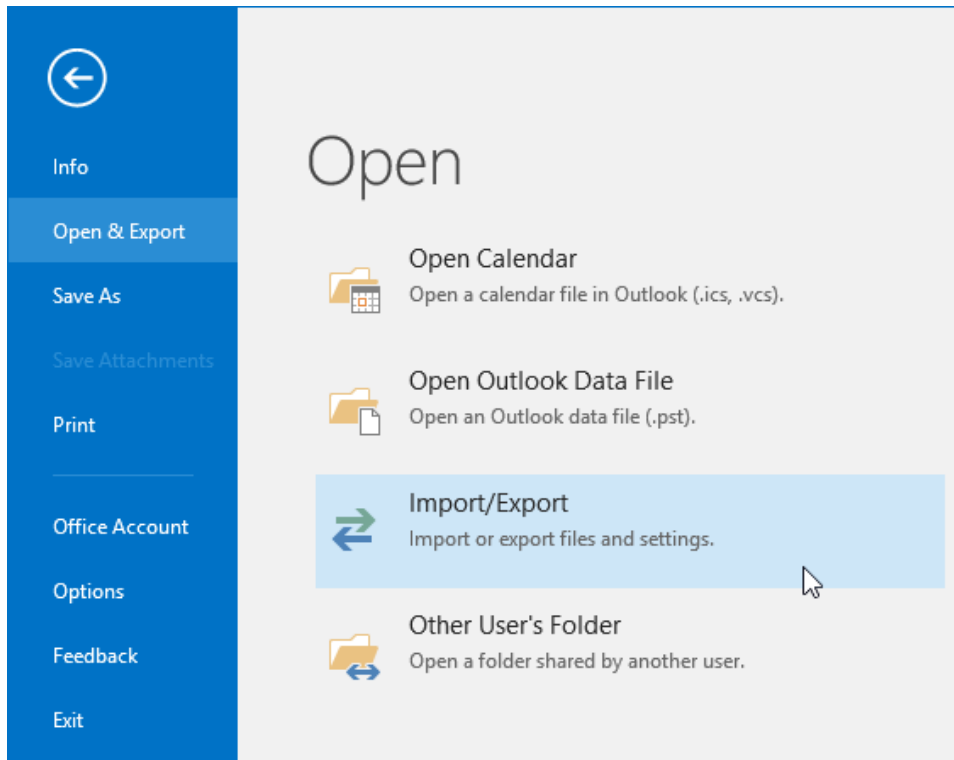
SECONDARY ADDRESS BOOKS

Any contacts that you add to Outlook 2016 will automatically be added to the default address book. However, you do have the option to create multiple address books. For example, you could use your default address book for internal contacts and a secondary address book for external ones.

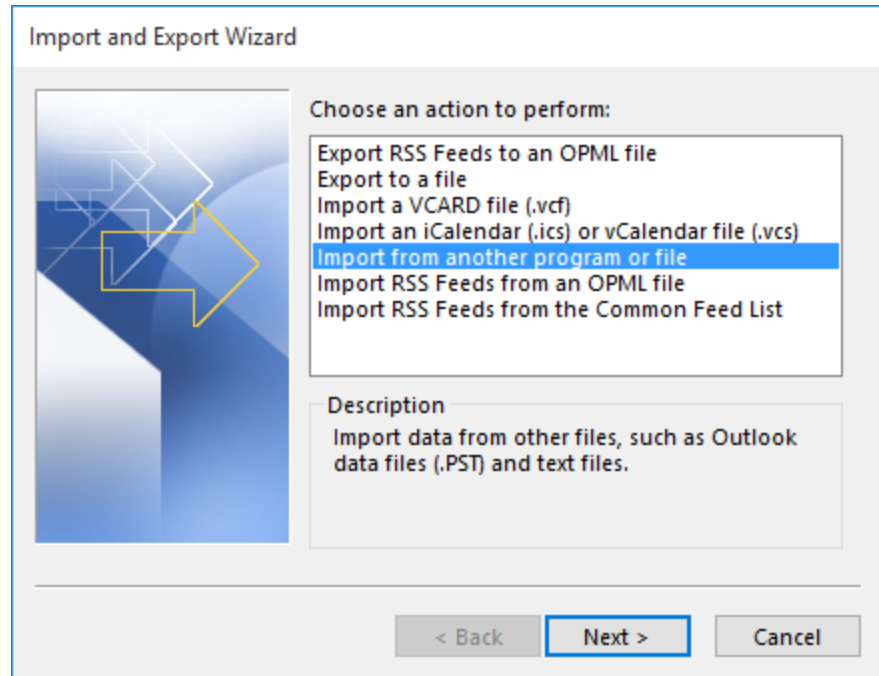
IMPORTING CONTACTS

If you are switching to Outlook 2016 from another mail client or you have contacts stored in another application, you can import them. However, they must be in a compatible file format, such as the Microsoft Excel Worksheet (.xls) or Comma Separated Value (.csv) file types.

To begin this process, open the People workspace. Then, click File → Open & Export → Import/Export:



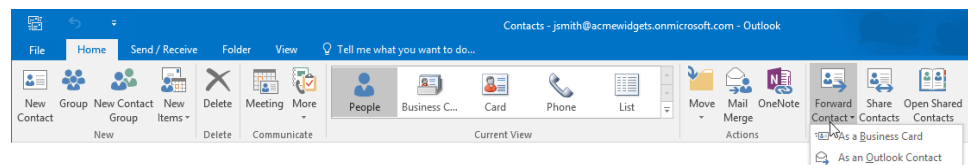
You will then be prompted to choose the type of file you are importing and Outlook will walk you through the process:



Note that you can also import contact information that is stored in vCard (.vcf) format by simply double-clicking on the vCard file while Outlook 2016 is open and clicking Home → Save & Close.

FORWARDING CONTACTS

If you would like to send one of your contacts to another person so that they can add it to their own list of contacts, you can forward it. To do this, click to select the contact in question and then click Home → Forward Contact:

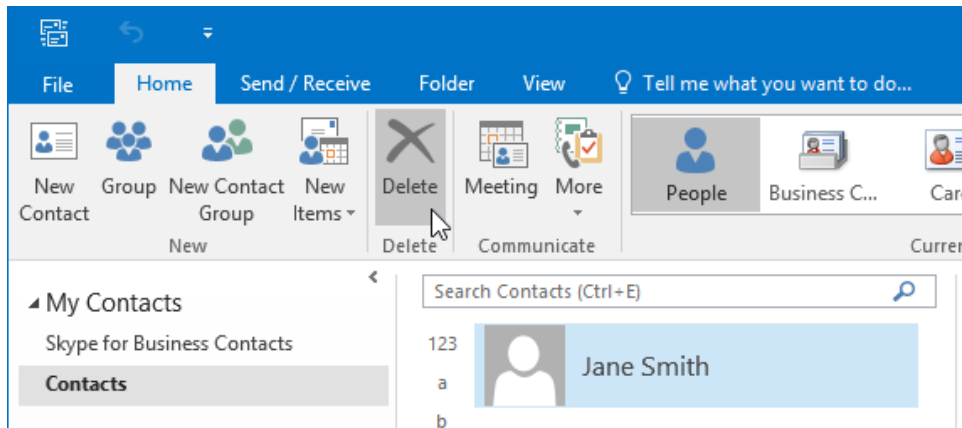


This drop-down command will give you two different forwarding options to choose from:

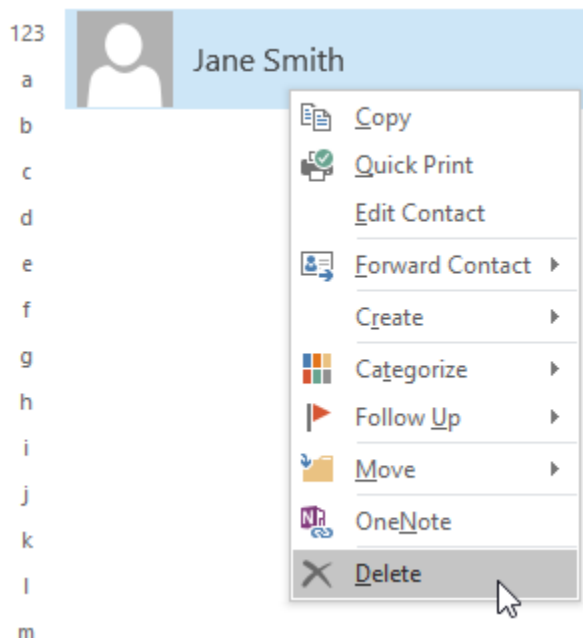
- **As Business Card:** Clicking this option will open a new message form with the selected contact attached as a business card. The business card will also be displayed directly in the body of the message.
- **As an Outlook Contact:** Clicking this option will open a new message form with the selected contact attached as an Outlook contact.

DELETING CONTACTS

To delete a contact from the People workspace, select the contact in question and then click Home → Delete:



Alternatively, you can right-click the listing for a contact in the working area and then click the Delete option:



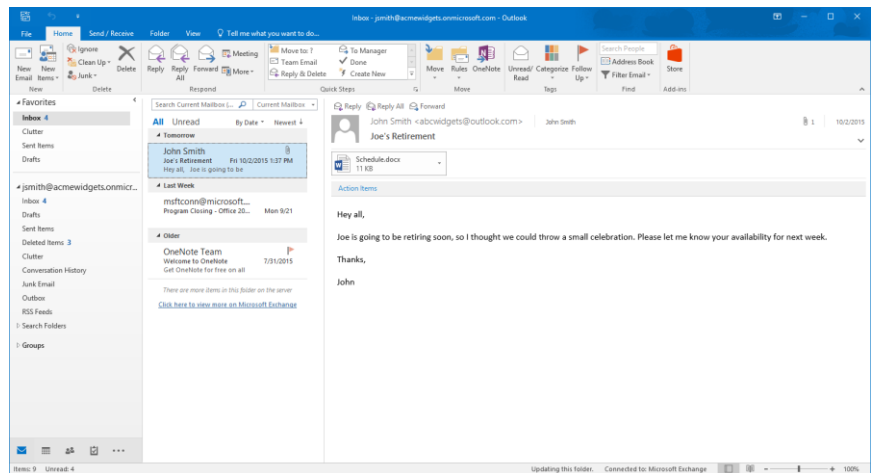
The selected contact will then be moved to the Deleted Items folder.

ACTIVITY 6-1

Creating and Updating Contacts

Now that you are using Outlook 2016 more and more in your workflow, you would like to take advantage of its powerful contact management features. To start, you need to add and update a few contacts.

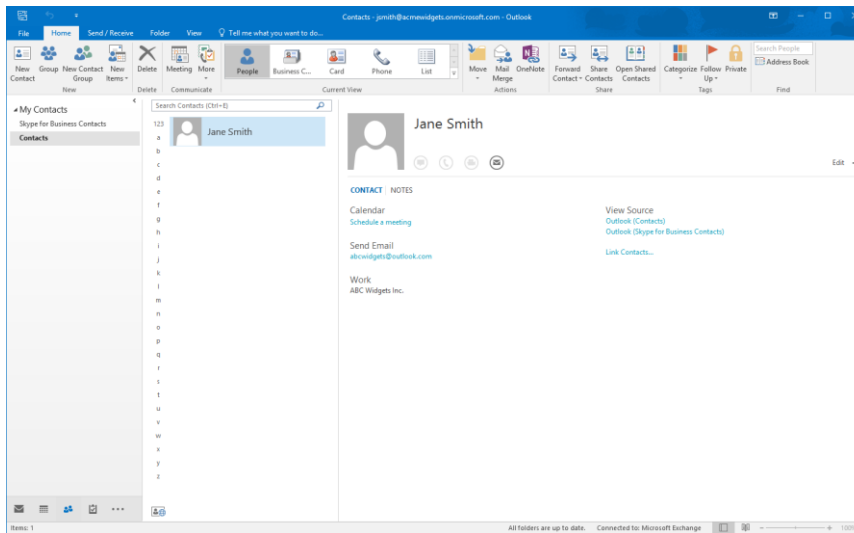
1. To begin, open Outlook 2016:



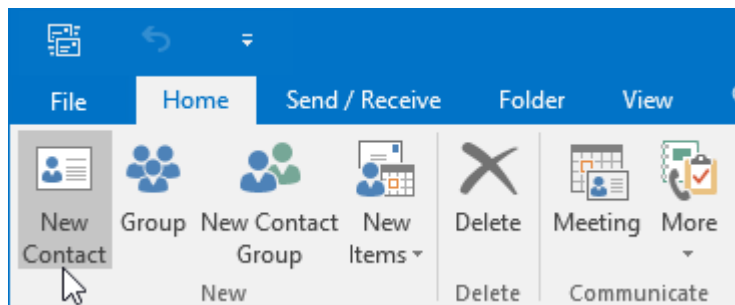
2. Display the People workspace by clicking the People button in the Navigation pane:



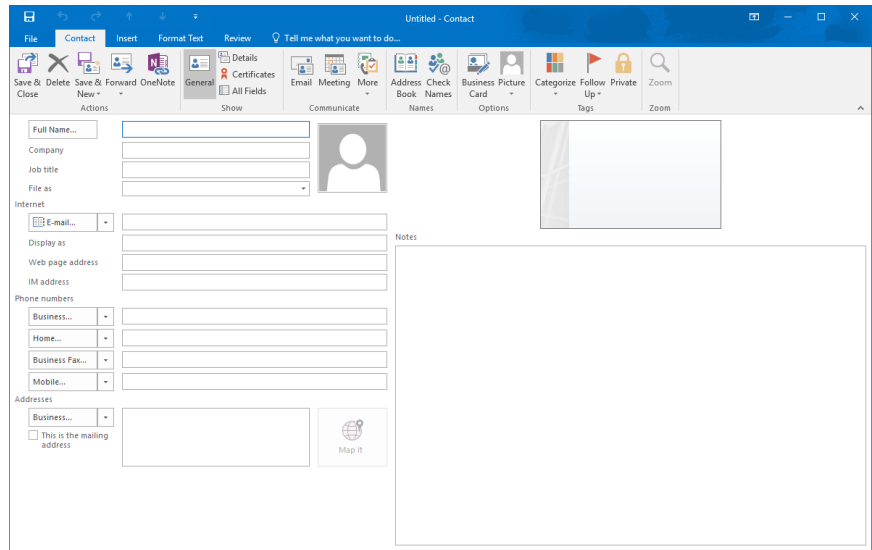
3. The People workspace will now be displayed. If you have any existing contacts, they will be listed here:



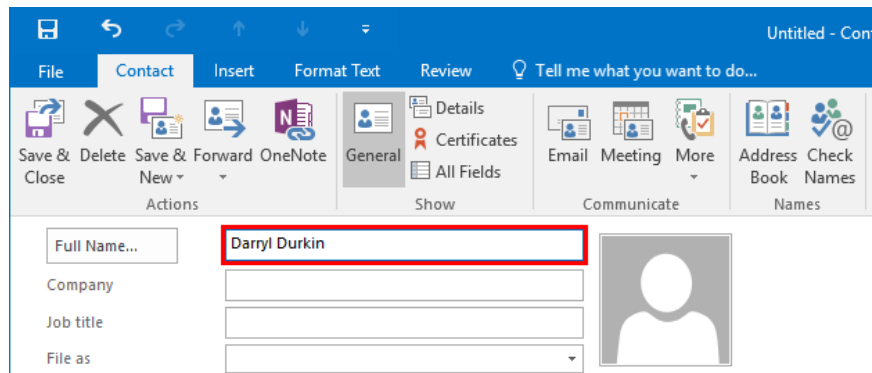
4. Start creating a new contact by clicking Home → New Contact:



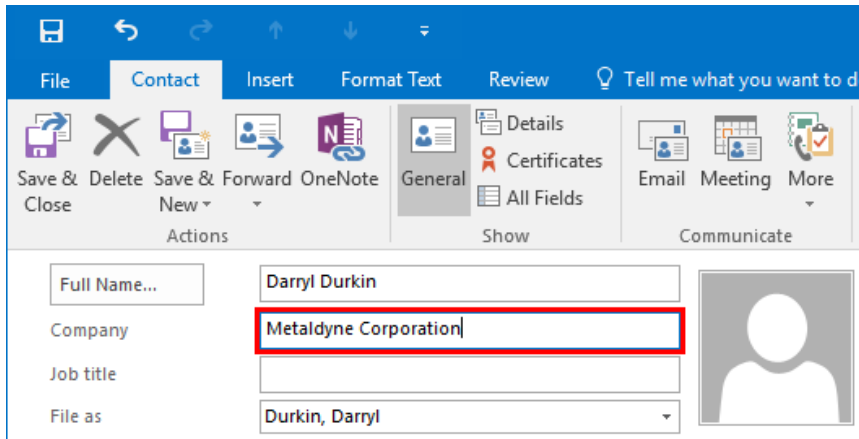
5. The Contact form will now be displayed in its own window:



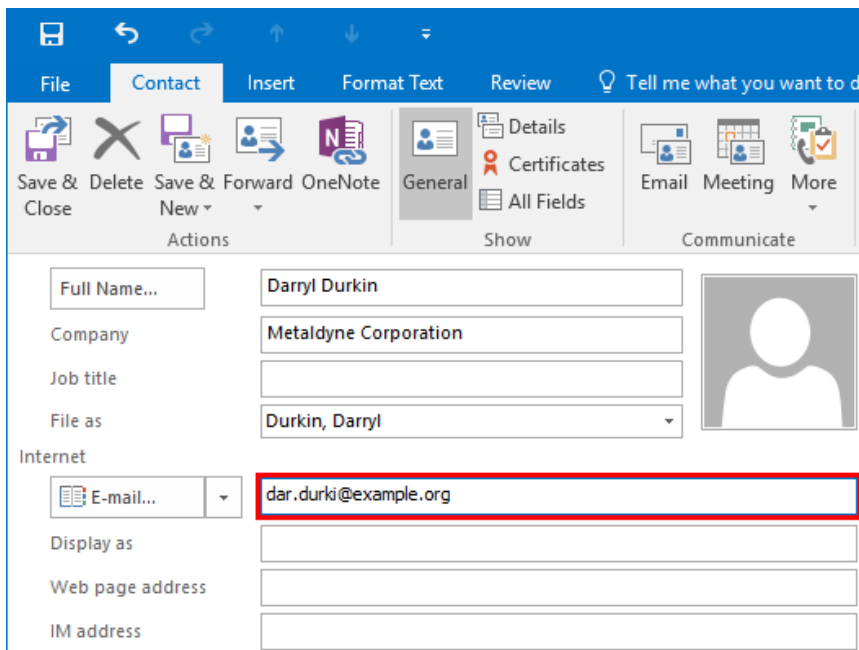
6. For this example, type “Darryl Durkin” into the Full Name field:



7. In the Company field, type “Metaldyne Corporation:”



8. Inside the E-mail field of the Internet section, type “dar.durki@example.org:”



9. Inside the Business field of the “Phone numbers” section, type “(555) 422-3942.”

The screenshot shows the Outlook Contact form for Darryl Durkin. The ribbon includes File, Contact, Insert, Format Text, and Review. The Contact ribbon has sections for Actions, Show, Communicate, and Names. The form fields are as follows:

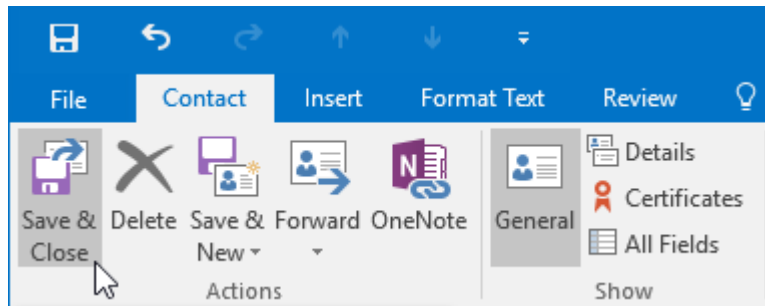
- Full Name: Darryl Durkin
- Company: Metaldyne Corporation
- Job title: (empty)
- File as: Durkin, Darryl
- Internet: E-mail: dar.durki@example.org
- Display as: Darryl Durkin (dar.durki@example.org)
- Web page address: (empty)
- IM address: (empty)
- Phone numbers: Business: (555) 422-3942 (highlighted with a red box)
- Home: (empty)
- Business Fax: (empty)
- Mobile: (empty)

10. Examine the preview of the contact card that appears near the top right-hand corner of the Contact form. You will see that it has been populated with the information that you have entered:

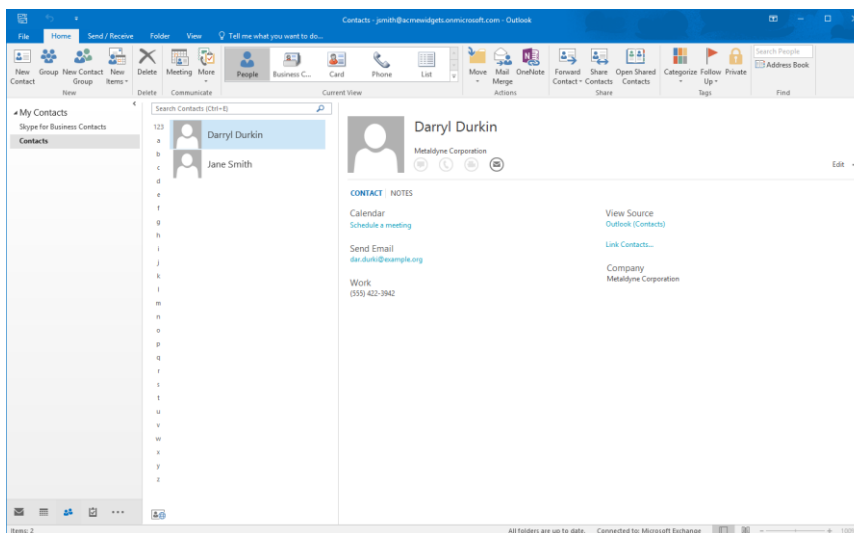
The screenshot shows the Outlook Contact form with a preview of the contact card. The preview card is highlighted with a red box and contains the following information:

- Name: Darryl Durkin
- Company: Metaldyne Corporation
- Email: dar.durki@example.org

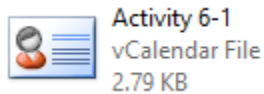
11. Click Contact → Save & Close:



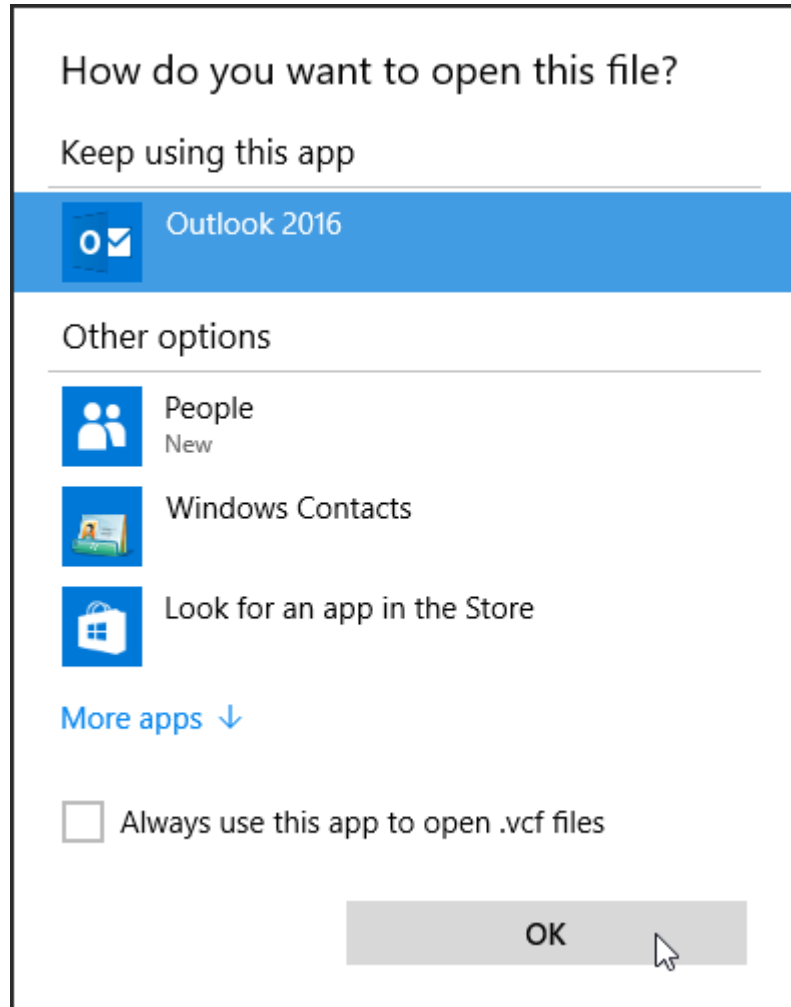
12. Returning to the People workspace, you will see a listing for the contact that you just entered in the working area:



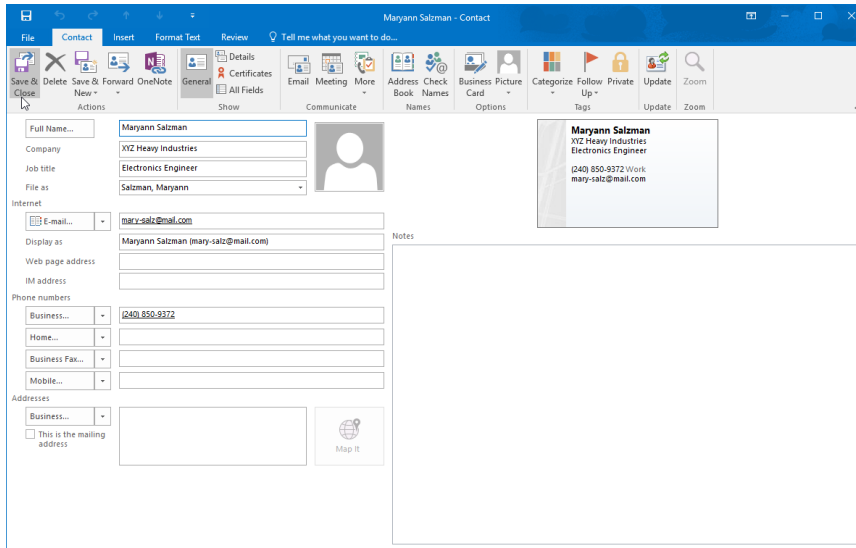
13. Next, you need to import a contact that was sent to you using the vCard format. Open your Exercise Files folder and double-click the Activity 6-1.vcf file:



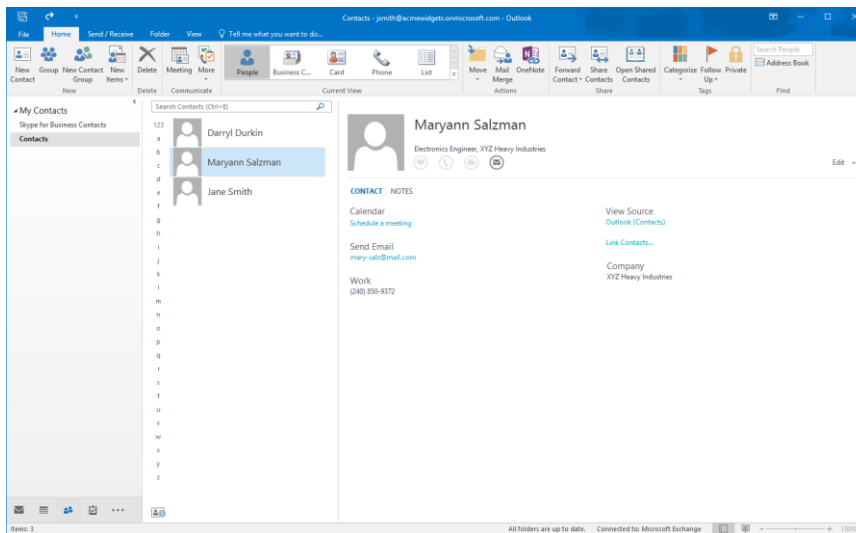
- Windows may display a pop-up dialog in which you can choose which application you want to use to open this file. Ensure that Outlook 2016 is selected and then click OK:



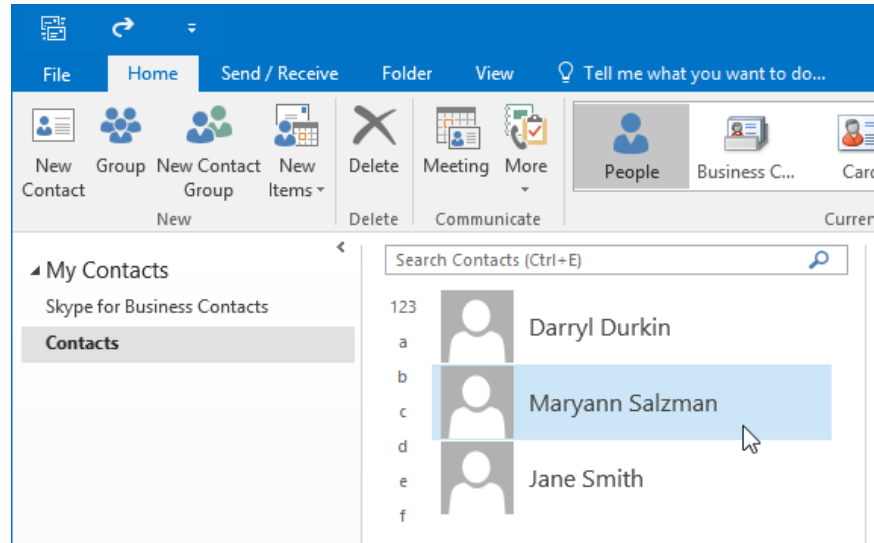
15. The contact will now appear in a separate Contact form. Click Home → Save & Close:



16. The contact will now appear with the other contact(s) in the working area of the People workspace:



17. You realize that the e-mail address for the contact that you just imported is out of date. Double-click on the listing for Maryann Salzman:



18. A pop-up will display the details of this contact. Replace the content in the Email field with “m.salzman@example.org:”

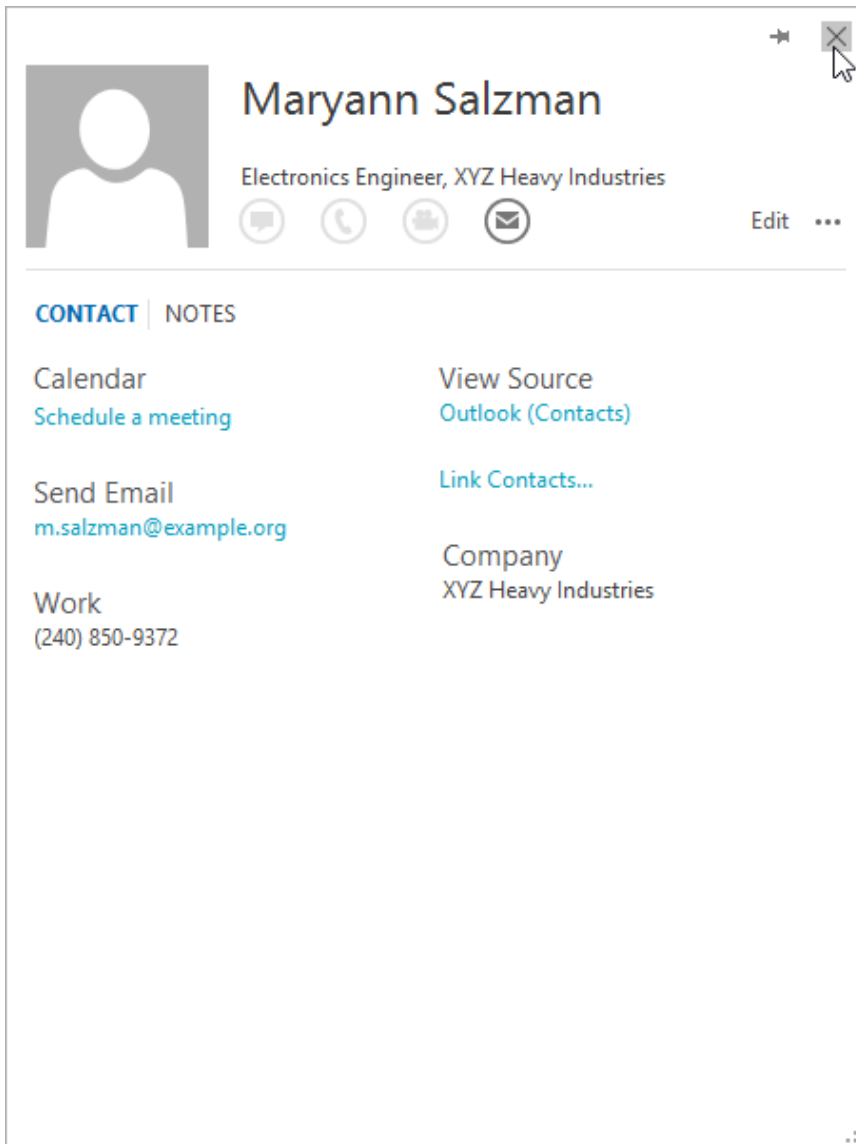
The screenshot shows a contact details window for Maryann Salzman. The window has a close button (X) in the top right corner. On the left, there is a placeholder for a profile picture. The name field contains "Maryann Salzman". Below the name, there are two tabs: "CONTACT" (selected) and "NOTES". Under the "CONTACT" tab, there are several sections, each with a plus icon in a circle to expand it: "Email", "Phone", "IM", "Work", "Address", and "Birthday". The "Email" section is expanded, showing the text "m.salzman@example.org" in a text box, which is highlighted with a red border. To the right of the "Email" section, it says "Changes Saved To Outlook (Contacts)". The "Work" section is also expanded, showing "Title" as "Electronics Engineer" and "Company" as "XYZ Heavy Industries". At the bottom of the window, there are "Save" and "Cancel" buttons.

19. Click the Save button:

The screenshot shows a contact form window for 'Maryann Salzman'. The form is divided into several sections:

- Name:** A text box containing 'Maryann Salzman'.
- CONTACT | NOTES:** A header section with 'CONTACT' selected.
- Email:** A section with a plus icon and a text box containing 'm.salzman@example.org'.
- Phone:** A section with a plus icon and a text box containing '(240) 850-9372'.
- IM:** A section with a plus icon.
- Work:** A section with a plus icon containing:
 - Title:** A text box containing 'Electronics Engineer'.
 - Company:** A text box containing 'XYZ Heavy Industries'.
- Address:** A section with a plus icon.
- Birthday:** A section with a plus icon.
- Changes Saved To:** A text box containing 'Outlook (Contacts)'.
- Buttons:** At the bottom right, there are 'Save' and 'Cancel' buttons. A mouse cursor is pointing at the 'Save' button.

20. The new e-mail address will now have been added to the contact. Click the Close button in the upper right-hand corner of this pop-up:



21. Close Microsoft Outlook 2016.

TOPIC B: View and Organize Contacts

As the number of contacts that you store in Outlook 2016 grows, so does the importance of being able to view and organize them. By knowing how to change the layout of the People workspace, you will be able to find the contacts that you are looking for in a more efficient manner. Over the course of this topic, you will learn all about viewing and organizing contacts in the People workspace.

Topic Objectives

In this topic, you will learn:

- About electronic business cards
- About contact views
- About the People pane
- How to use the Find tool
- About print styles for contacts

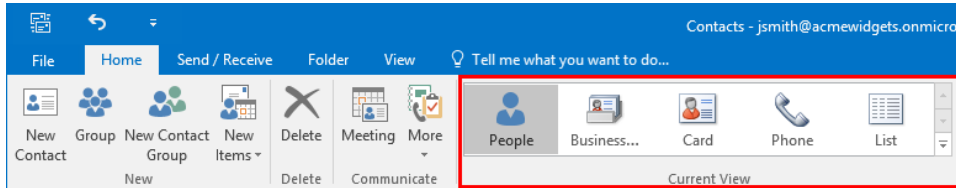
ELECTRONIC BUSINESS CARDS

Electronic business cards can be used with Outlook 2016 to easily share contact information with others. Much like their physical counterparts, they include all the contact information that has been added to them. Additionally, the design of an electronic business card is fully customizable so you can add elements such as logos and backgrounds.

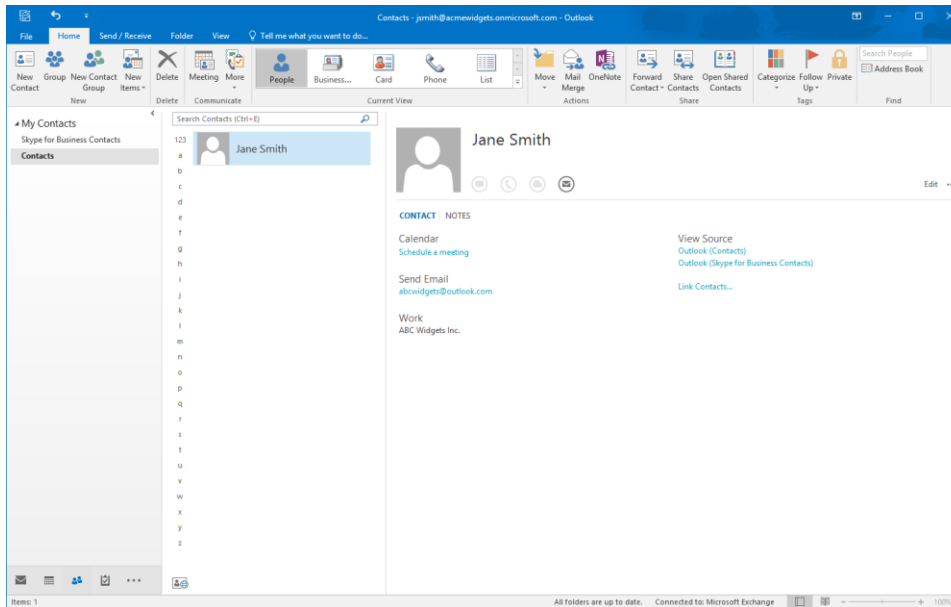
You are able to create your own electronic business card using Outlook 2016 and share it with anyone else by attaching it to an e-mail message. You even have the option to include your electronic business card in the signature line of your e-mail messages so that everyone you communicate with will instantly have access to it.

CONTACT VIEWS

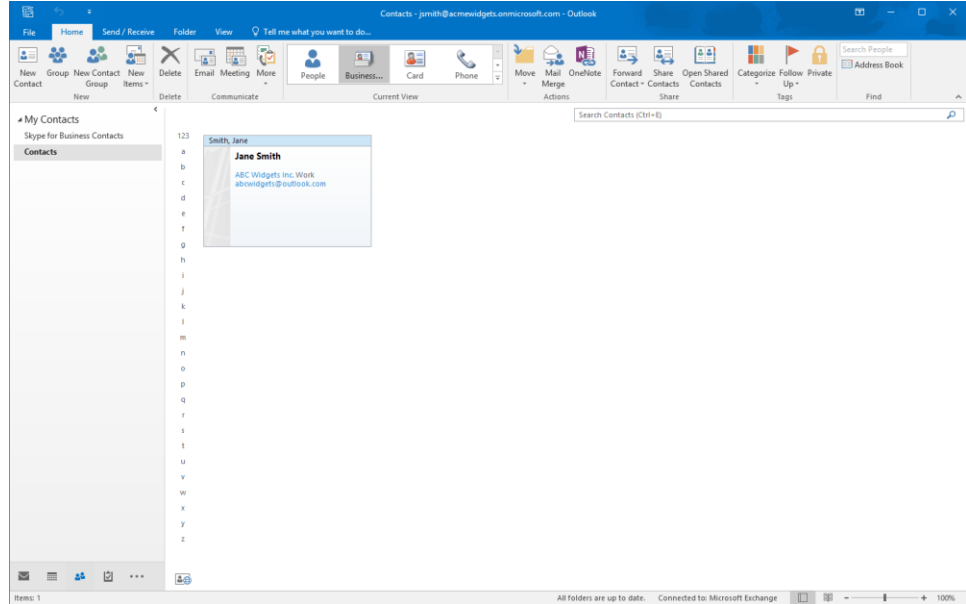
There are several different views that you can use to change how contacts are displayed in the People workspace. You can find all of these options inside the Current View group of the Home tab:



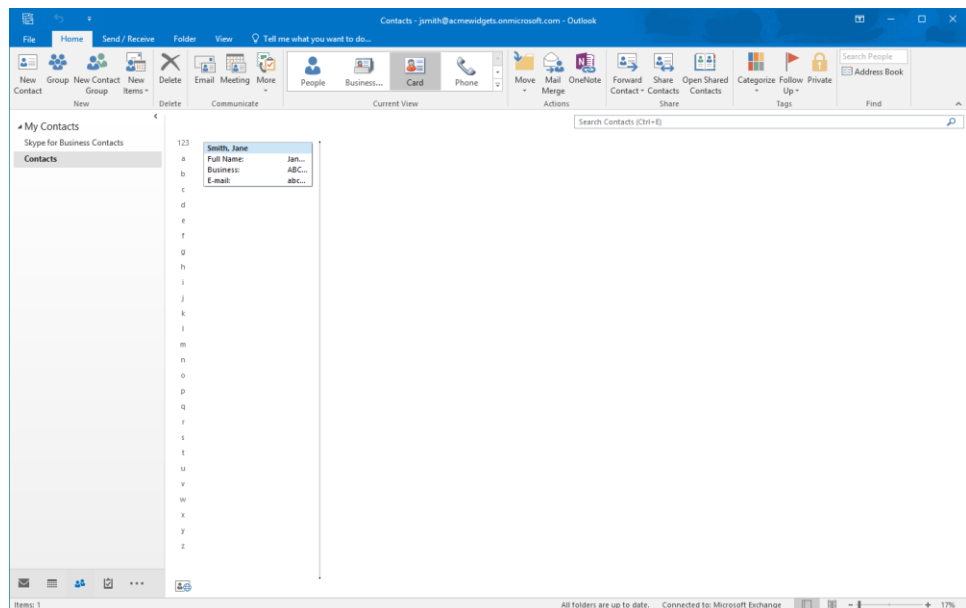
By default, the People workspace uses the People view. This will list all of your contacts in the working area, while the details will be displayed in the Reading pane:



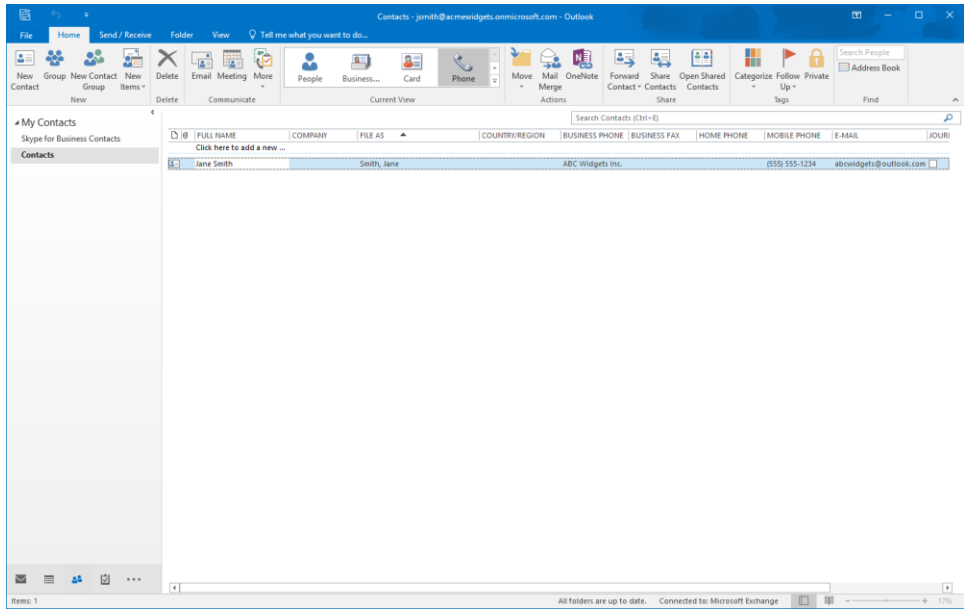
The **Business Card** view will display each contact as a small business card. Each business card will display varying degrees of information about the contact, but they will typically include at least the contact name and some contact information:



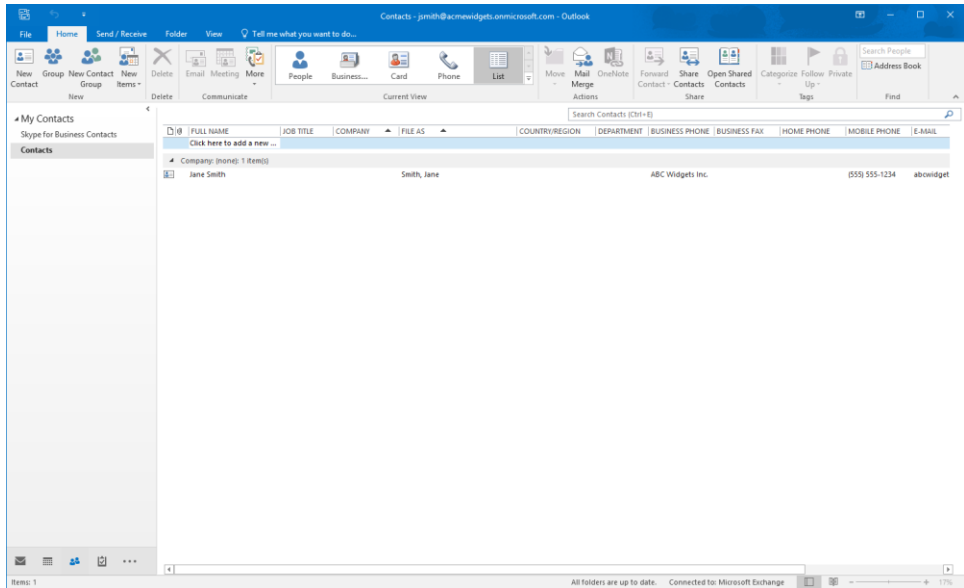
The **Card** view is similar to the Business Card view; however, it displays smaller cards for each contact in descending alphabetical order by last name. If you select a contact while in this view, you will see the details of the contact displayed in the Reading pane:



The **Phone** view will list your contacts in ascending order by their last name with their business phone number as the primary point of contact:

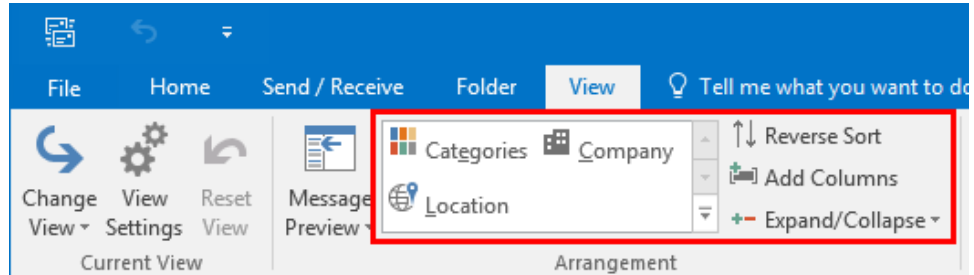


Finally, the **List** view will display your contacts as a list and group common contacts together. For example, if you have two or more contacts that work for the same company, they will be grouped together. Like the other views, contacts are sorted by last name in ascending alphabetical order:



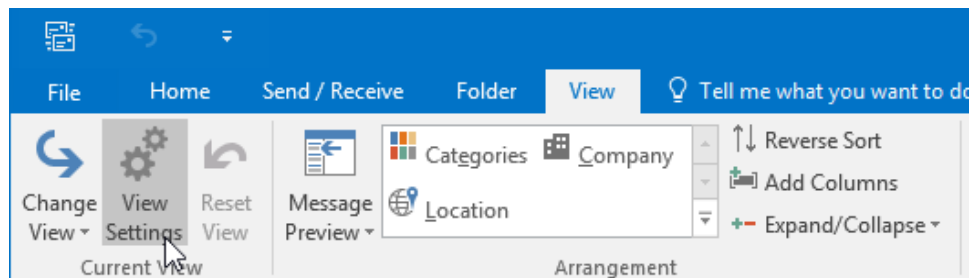
Sort Options

All of the contact views sort contacts by last name in ascending alphabetical order. To change this order in the Phone or List views, you can use the commands in the Arrangement group of the View tab:

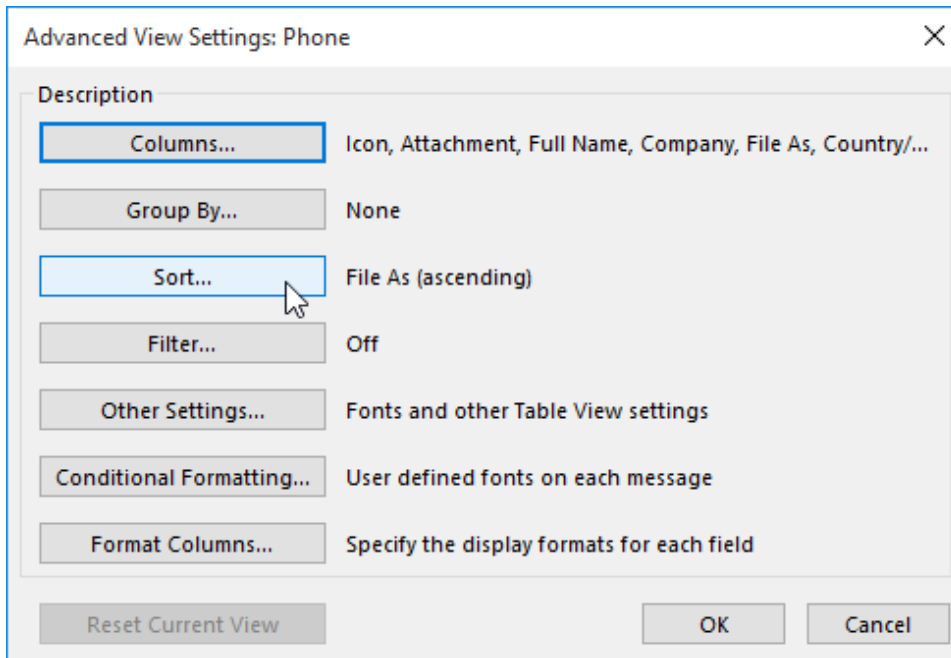


Clicking the **Reverse Sort** command will reverse whichever sort (ascending or descending) is currently applied to the opposite sorting order. Additionally, if you are using either the Phone or List views, you can choose to arrange your contacts by categories, company, or location.

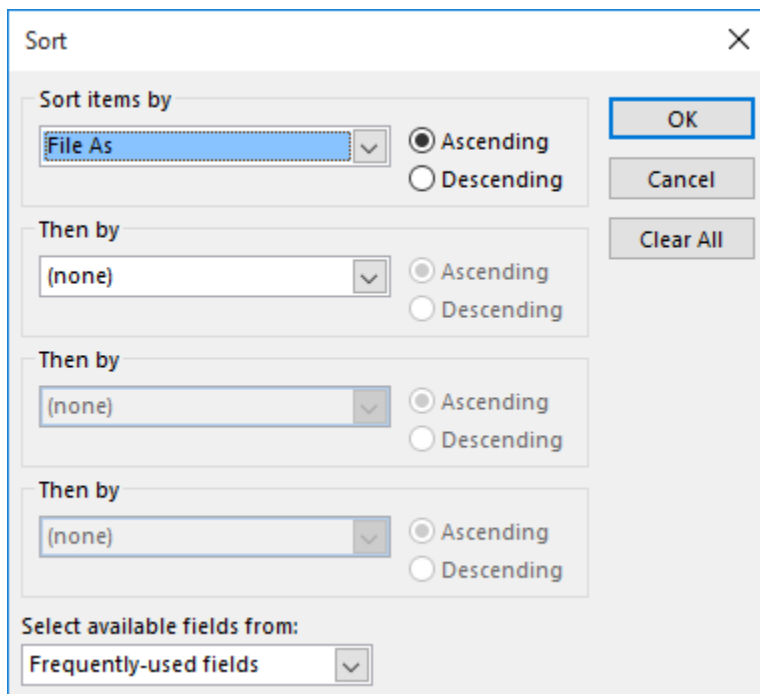
If you would like more control over how contacts are sorted, you can use the Sort dialog box. This dialog box is opened by clicking View → View Settings:



Once the Advanced View Settings dialog box is displayed, click the Sort button:

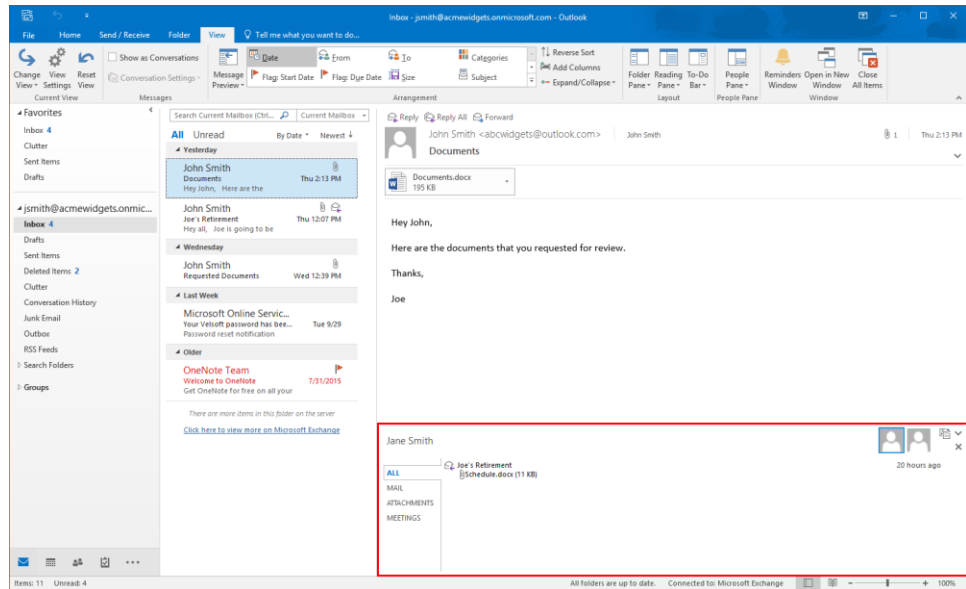


In the Sort dialog box, you can then choose how you primarily want items sorted, followed by three subsequent sort options:

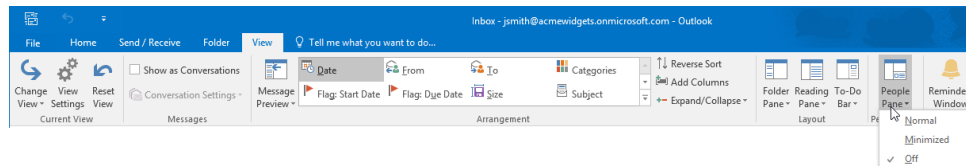


THE PEOPLE PANE

The People pane is intended to help you keep track of your contacts and your previous interactions with them. While it is minimized by default, the People pane can be expanded to dominate the lower half of the Reading pane in Outlook 2016:

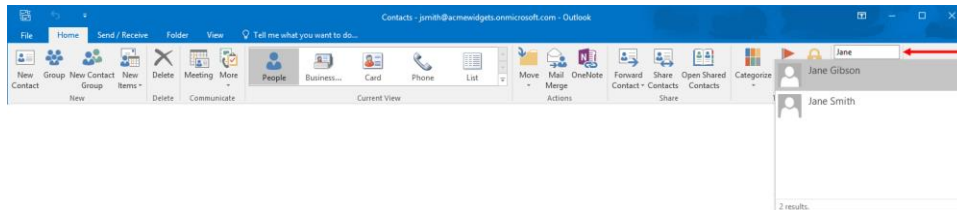


The People pane will include a picture of the contact (if one is available), as well as any recent e-mail conversations, upcoming calendar items, and more. You can change it to its minimized state by clicking the Minimized option or expand it by clicking the Normal option. To disable it entirely, click View → People Pane → Off:



THE SEARCH PEOPLE TOOL

If you have a lot of contacts in Outlook 2016, the Search People tool will become invaluable. It allows you to search through all of your contacts to find the exact contact that you need. To use this tool, click inside the “Search People” field on the Home tab and then type your search terms:



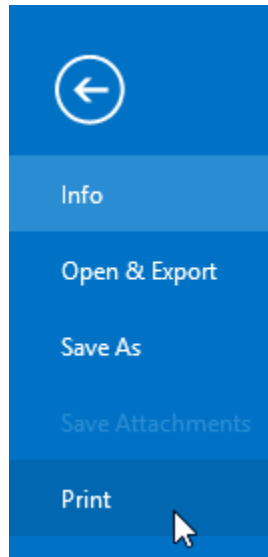
The results from your search will immediately be listed in a drop-down menu just below the text box. Click on the result that you would like to open and work with.

Search Terms

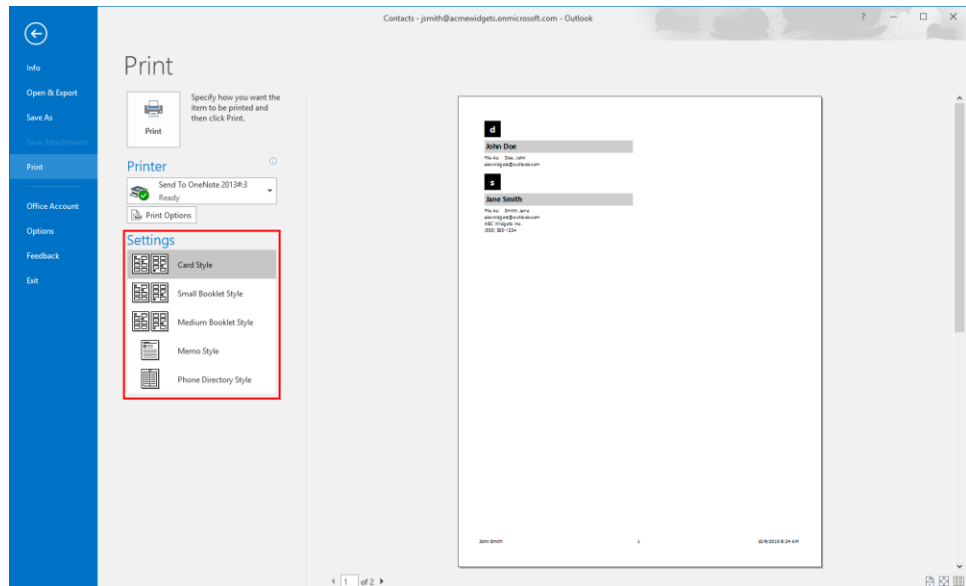
Note that when you are using the Find tool, Outlook will only search through contact names (first, last, and partial); Display As names; e-mail addresses; and company names.

CONTACTS PRINT STYLES

Occasionally you may find the need to print your contacts so that you have a physical reference. There are several different styles that you can choose from that each have a varying degree of information. You can find all of these styles by clicking File → Print while in the People workspace:



The print styles can be found inside the Settings section:



Below is a breakdown of what you can expect from each print style:

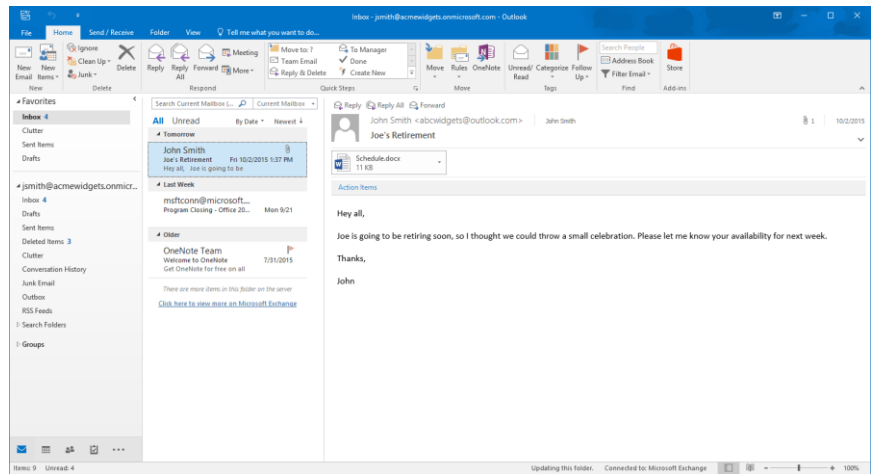
- **Card Style:** Choosing this option will print each contact as a business card with contact information. Like the Card view, contacts are listed in alphabetical order (ascending or descending).
- **Small Booklet Style:** This style will print out each contact on the page in such a way that it can be folded into a small booklet. Each contact includes their name and basic contact information. Like the other styles, contacts are sorted in alphabetical order (ascending or descending).
- **Medium Booklet Style:** Similar to the previous style, the Medium Booklet Style will print out contacts on a page so that they can be folded into a medium-sized booklet. Contacts are sorted in alphabetical order (ascending or descending).
- **Memo Style:** Choosing this style will only print out the information for one contact. It includes all of the contact information in a memo-like fashion. To choose which contact you would like to print using this style, you must first select the contact in question before clicking File → Print.
- **Phone Directory Style:** Printing your contacts using this style will have them appear as if they were listings in a phone book. Only the names of your contacts and their phone numbers will be printed. Contacts that are printed in this style are sorted in alphabetical order.
- **Table Style:** This particular style is the only available contact print style that you can select when you are using the Phone or List contact views. It will print all of your contacts in a tabular fashion, much the same way as they are displayed when using either of those views.

ACTIVITY 6-2

View and Organize Contacts

Now that you have added some contacts to Outlook 2016, you would like to see what different kinds of views are available in the People workspace. Additionally, you would like to print one of your contacts for reference. Students should complete Activity 6-1 before beginning this activity. A printer is also required for this activity.

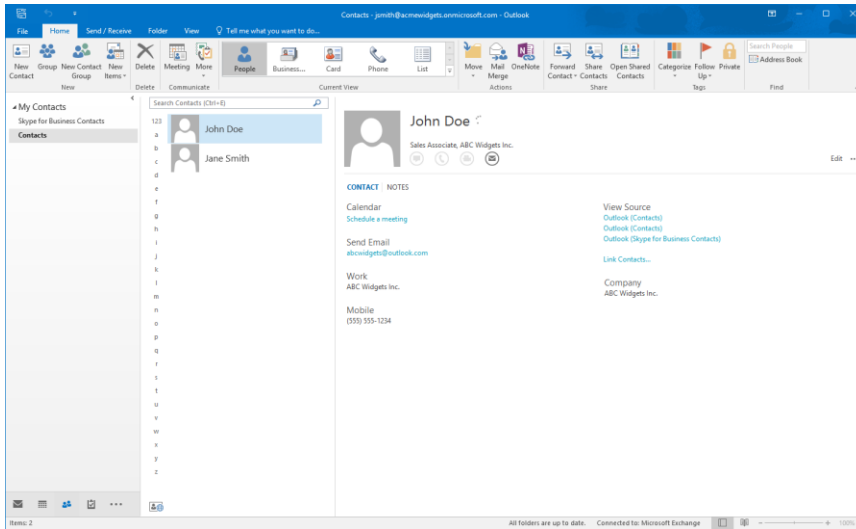
1. To begin, open Outlook 2016:



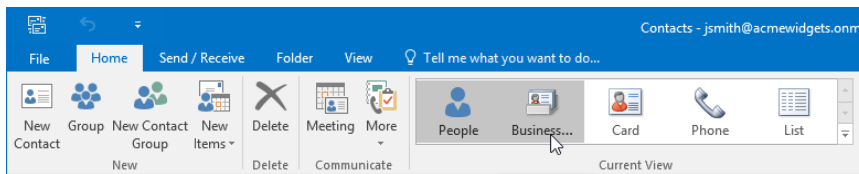
2. Display the People workspace by clicking the People button in the Navigation pane:



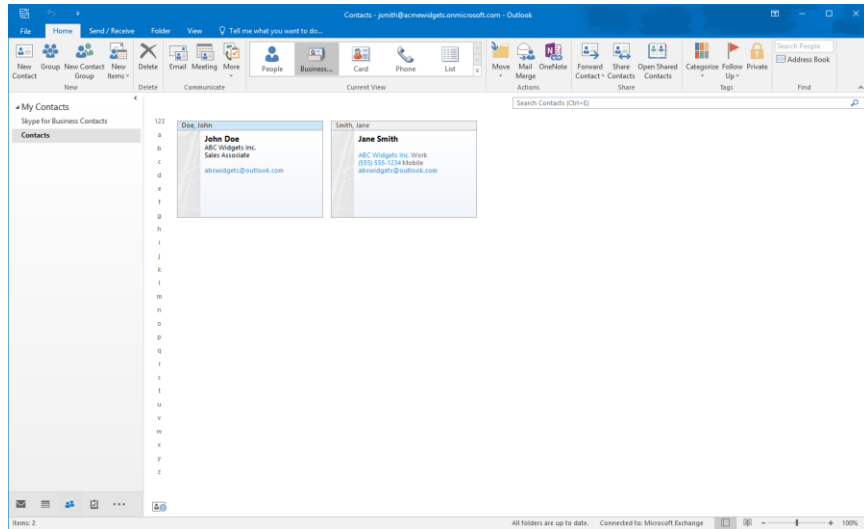
- By default the People contact view will be applied, so you will see each contact listed in the working area with the details shown in the Reading pane:



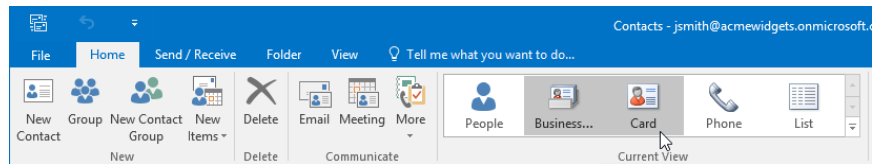
- Apply the Business Card contact view by clicking Home → Business Card:



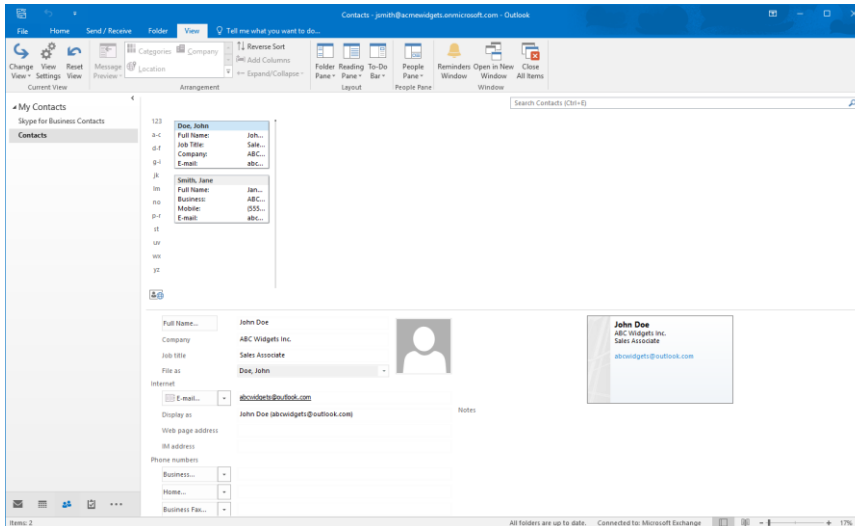
5. You will now see all of your contacts displayed as a collection of business cards:



6. Apply the Card contact view by clicking Home → Card:

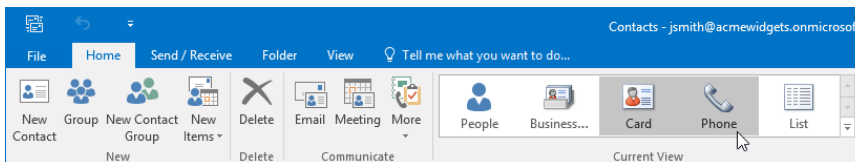


7. You will see that this view displays small cards for each contact. The details of the selected contact will be displayed in the Reading pane at the bottom of the workspace:



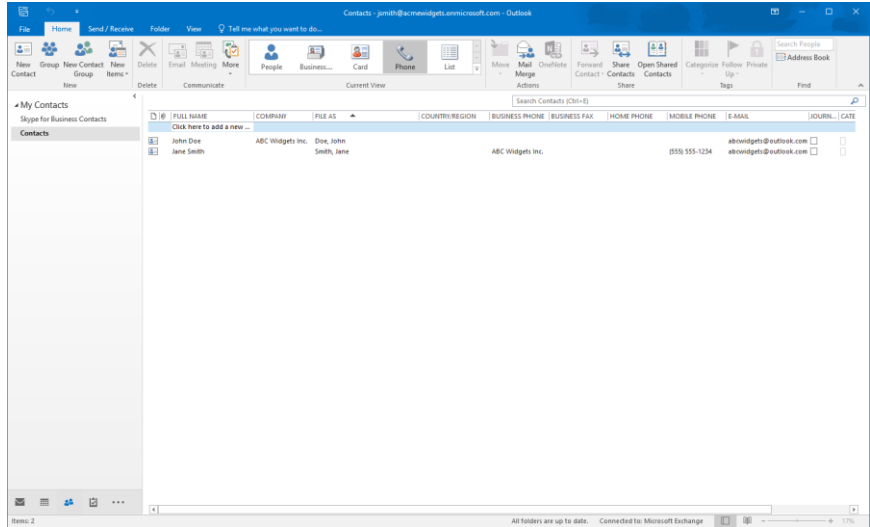
(If the Reading pane is not displayed, click View → Reading Pane → Bottom.)

8. Click Home → Phone to apply the Phone contact view:

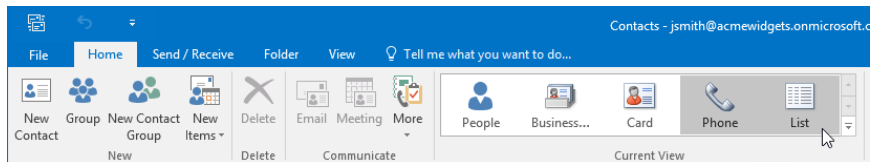


(If you do not see this view, click the down arrow in the Current View gallery to access it.)

9. With the Phone contact view applied, you will see that each contact is displayed in a list form with the telephone information displayed prominently:

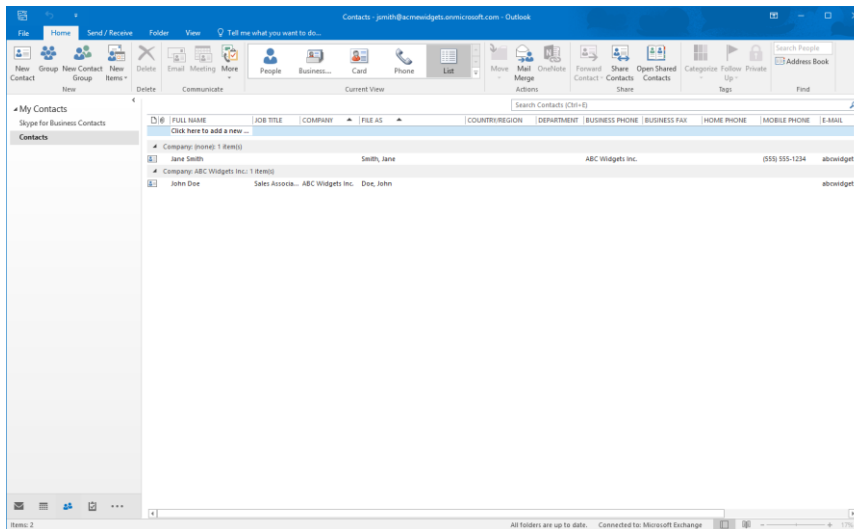


10. Click Home → List:

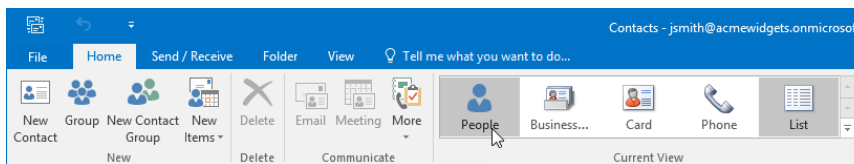


(If you do not see this view, click the down arrow in the Current View gallery to access it.)

11. You will see that each contact will be listed and grouped according to company information:

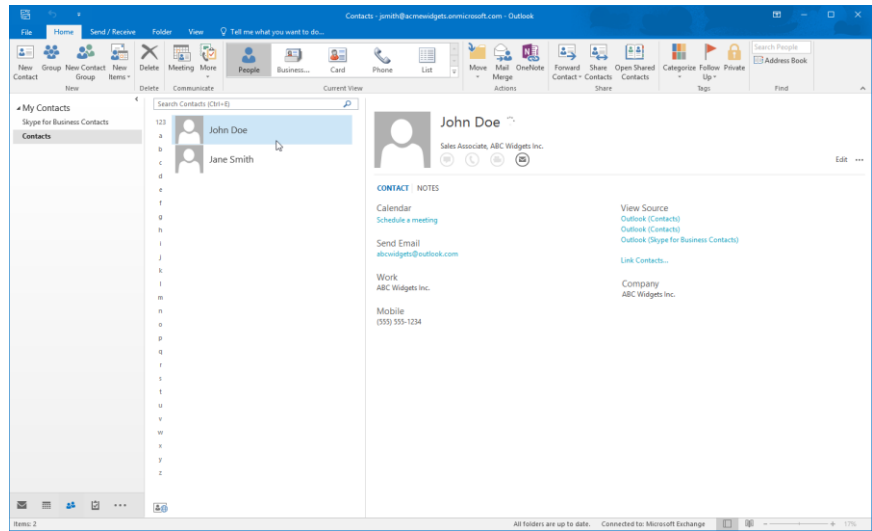


12. Return to the People contact view by clicking Home → People:

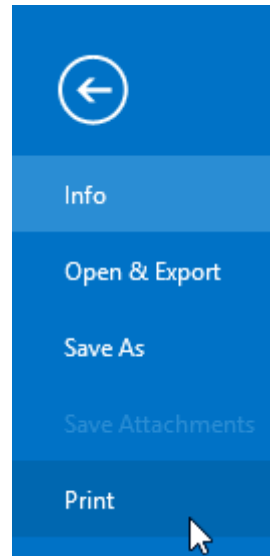


(If you do not see this view, click the up arrow in the Current View gallery to access it.)

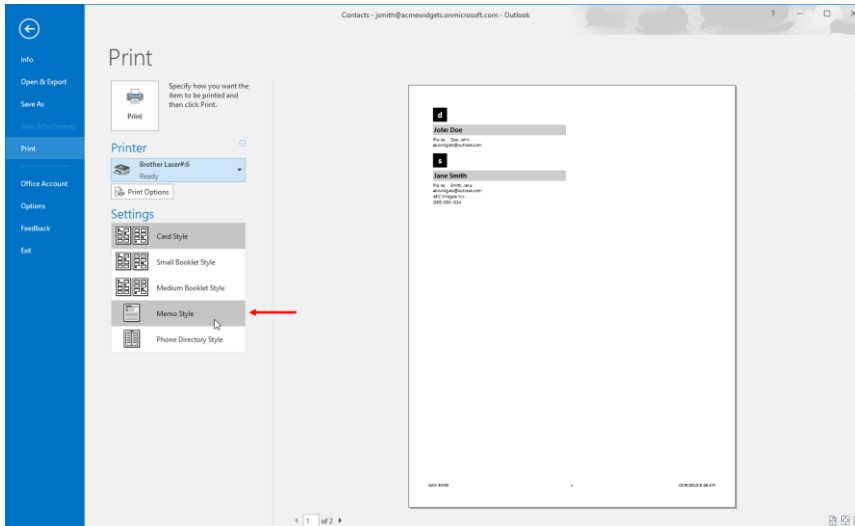
13. Click to select any one contact that you would like to print:



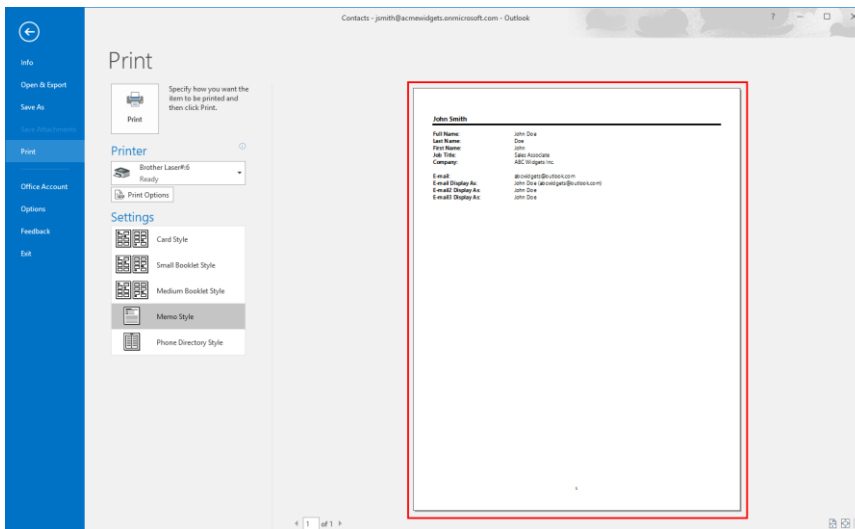
14. Click File → Print:



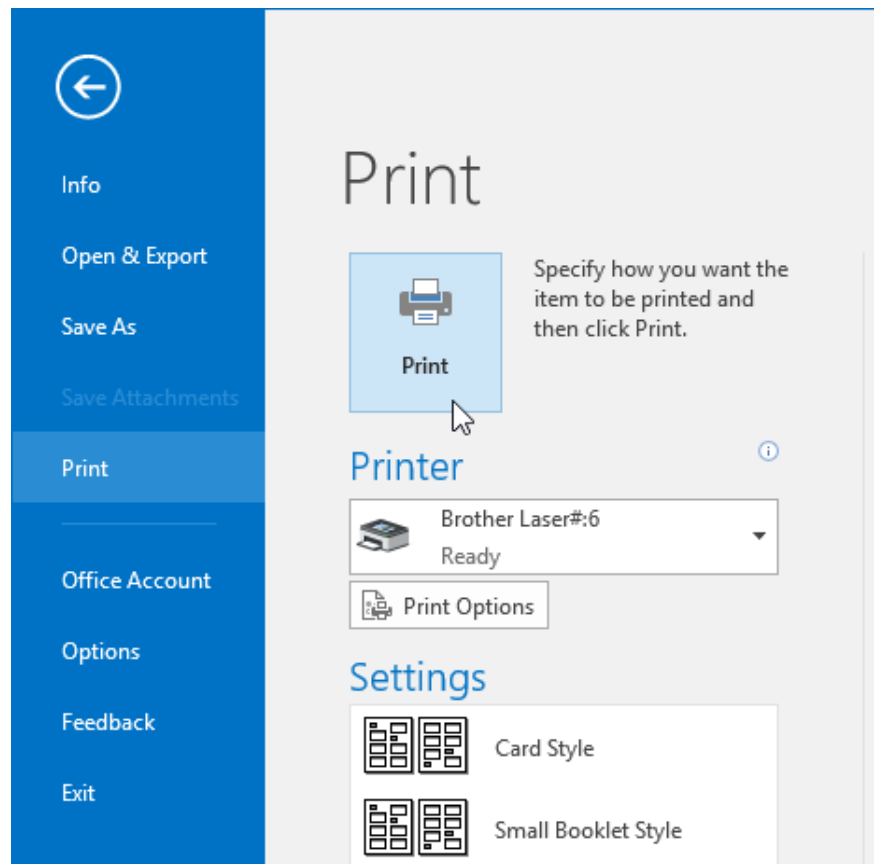
15. With the Print category selected, you will see a preview of how the currently selected contact view will appear on the printed page. Within the Settings section, click the Memo Style:



16. With the Memo Style applied, you will see the contents of the selected contact in the preview:



17. Ensure that the appropriate printer has been selected from the Printer drop-down command and then click the Print button:



18. The selected contact will now have been printed. Close Microsoft Outlook 2016.

Summary

During this lesson you learned how to create and update contacts in Outlook 2016, as well as how to view and organize them. You should now feel comfortable creating new contacts from scratch, as well as using the various contact views that are available in the People workspace.

REVIEW QUESTIONS

1. In what workspace are contacts listed in Outlook 2016?
2. How do you open the contact form?
3. What is the command sequence to forward your contact as a business card?
4. What are the five contact views?
5. What is the command sequence to display the People pane in the normal state?

LESSON 7: WORKING WITH TASKS AND NOTES

Lesson Objectives

In this lesson you will learn how to:

- Create and manage tasks
- Manage notes

TOPIC A: Create Tasks

Outlook 2016 not only provides a central place to keep your messages, calendar, and contacts organized; it also gives you the ability to schedule and manage tasks. For example, if you need to review a presentation by a specific date, you can create a task that will remind you to do just that. Over the course of this topic, you will learn all about tasks and how to create them.

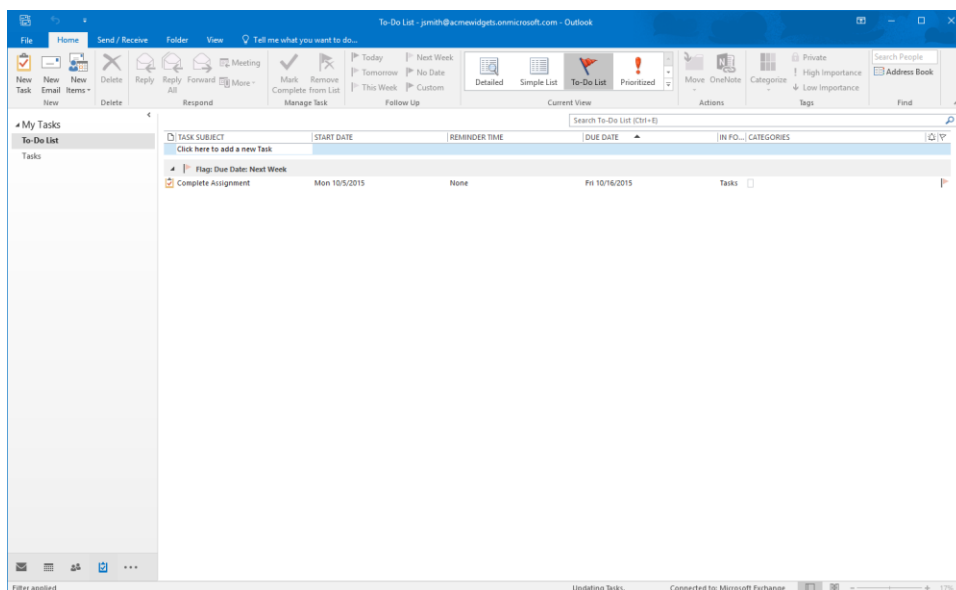
Topic Objectives

In this topic, you will learn:

- About tasks
- About the Task form
- How to create recurring tasks
- About task views
- About server tasks
- How to set task options
- How to print tasks

TASKS

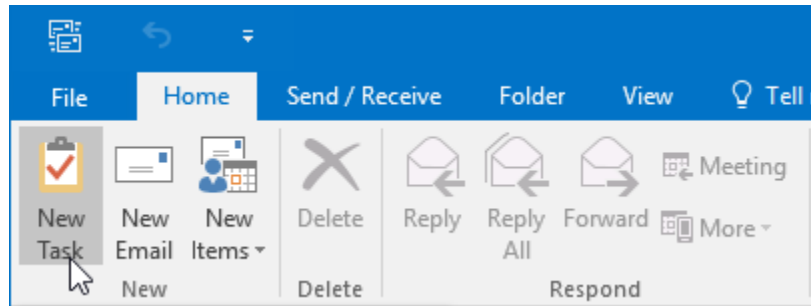
Tasks are a type of Outlook item that are used to define and track an activity that you need to complete by a specific date and/or time. You are able to assign tasks to yourself or other contacts, while contacts are able to assign tasks to you. All tasks are managed using the Tasks workspace:



This workspace will list any tasks that have been assigned to you by yourself or others.

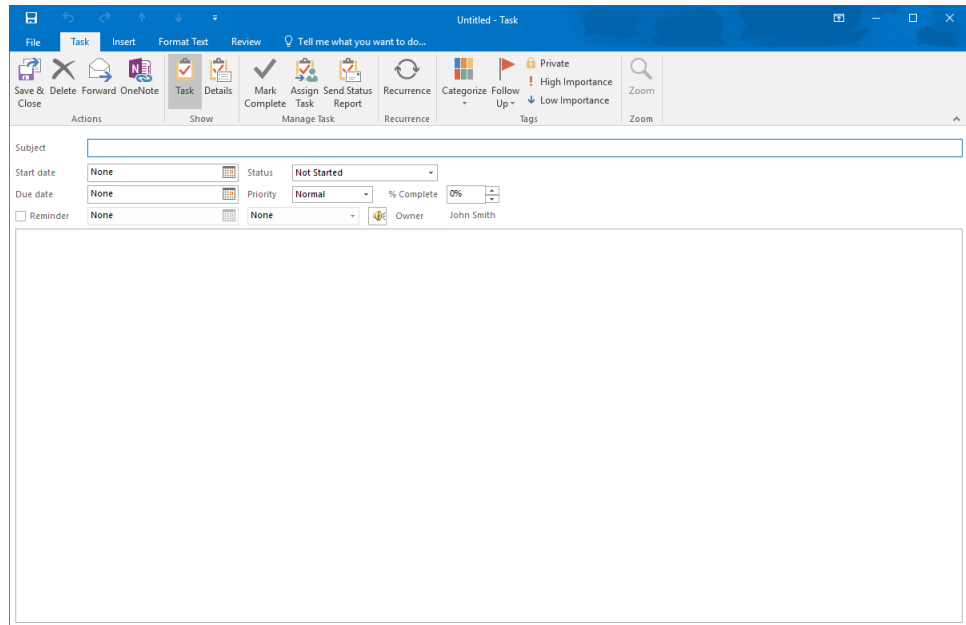
TASK FORM

To create a task, you first need to open the Task form. This is done by clicking Home → New Task while in the Tasks workspace:



(If you are not in the Tasks workspace, click Home → New Items → Task.)

When open, the Task form will provide you with several fields to create a new task:

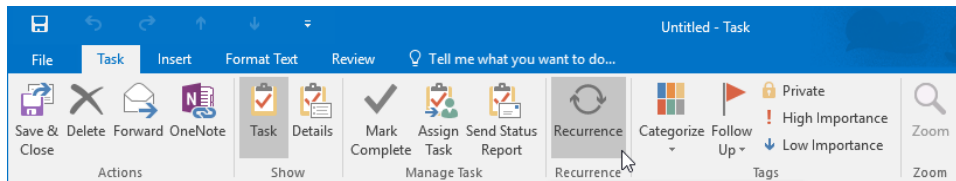


Here is an overview of these fields:

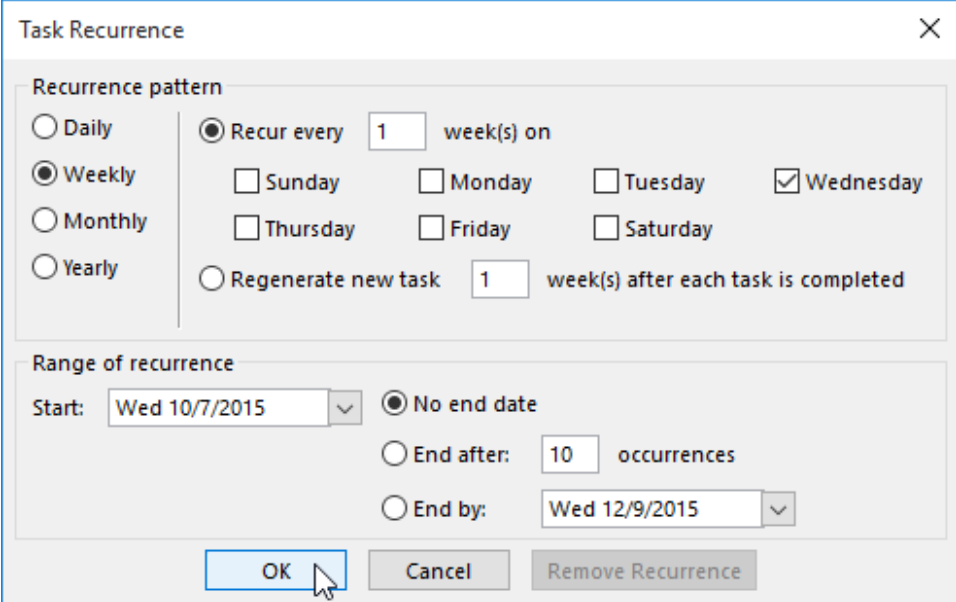
- Inside the **Subject** field you can enter a brief description of the task that you are adding.
- In the **“Start date”** and **“Due date”** fields, you can enter when you would like the task to begin and when you would like it to end.
- The **Status** drop-down menu allows you to specify the current stage the task is in (Not Started, In Progress, Completed, Waiting on someone else, or Deferred).
- The **Priority** drop-down menu is used to specify how important this task is (Low, Normal, or High).
- The **% Complete** increment box is used to specify the level of progress that has been achieved for the current task.
- The **reminder** controls are used to add a reminder to the task that you are creating.
- The **body** of the Task form can be used to add more specific information about a task.

CREATING RECURRING TASKS

Like calendar appointments, you can make tasks reoccur at a selected interval. To do this, open a task and click Task → Recurrence:



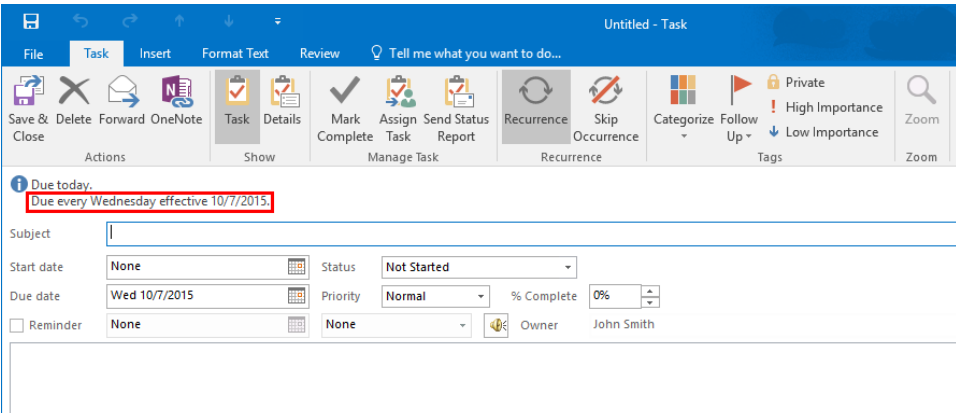
This action will display the Task Recurrence dialog box. Here, you can choose how often you want the task to reoccur, how long the recurrence should last, and when you want that recurrence to happen. Click OK when your options are set:



The image shows the 'Task Recurrence' dialog box in Outlook. It is divided into two main sections: 'Recurrence pattern' and 'Range of recurrence'. In the 'Recurrence pattern' section, the 'Weekly' radio button is selected. Under 'Recur every', the value '1' is entered in the text box, followed by 'week(s) on'. The days of the week are listed with checkboxes: Sunday, Monday, Tuesday, Wednesday (checked), Thursday, Friday, and Saturday. There is also an option for 'Regenerate new task' with a value of '1' week(s) after each task is completed. In the 'Range of recurrence' section, the 'Start' date is 'Wed 10/7/2015'. The 'No end date' radio button is selected. Other options include 'End after: 10 occurrences' and 'End by: Wed 12/9/2015'. At the bottom, there are three buttons: 'OK', 'Cancel', and 'Remove Recurrence'.

(Note the “Regenerate new task” radio button. Selecting this option will make the next task in a recurrence only happen if the previous task is marked as complete.)

You will then see the recurrence summary just below the ribbon in the Task form:



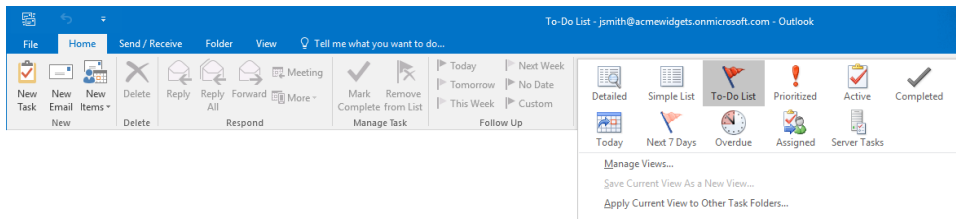
The image shows the Outlook Task form for an 'Untitled - Task'. The ribbon is visible with tabs for File, Task, Insert, Format Text, Review, and Tell me what you want to do... The Task ribbon is active, showing various task management icons. Below the ribbon, a notification bar indicates 'Due today. Due every Wednesday effective 10/7/2015.' The task details are as follows:

Subject			
Start date	None	Status	Not Started
Due date	Wed 10/7/2015	Priority	Normal
		% Complete	0%
Reminder	None	None	Owner: John Smith

(The Skip Occurrence command will become available once you have applied recurrence to a task. This command allows you to skip the current occurrence of a recurring task.)

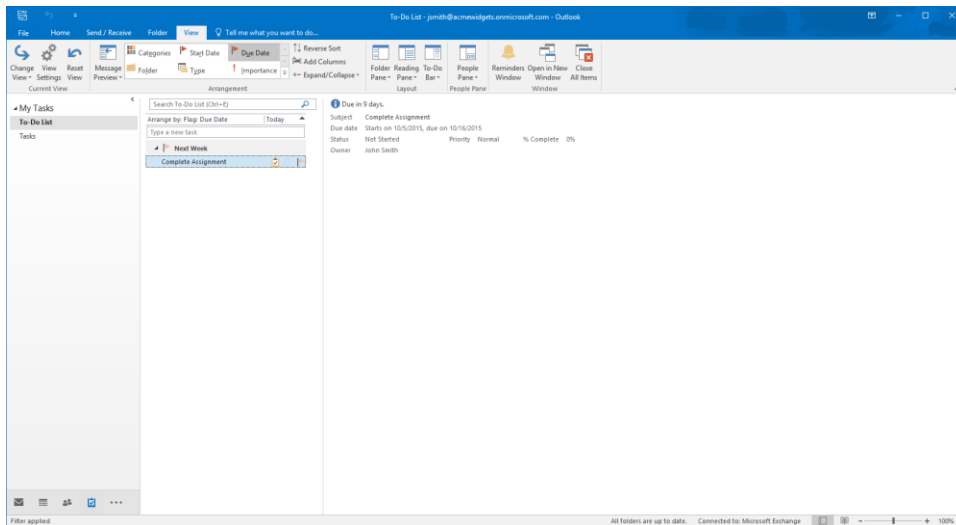
TASK VIEWS

There are many different views that are used to change how tasks are displayed in the Tasks workspace. You can find all of these different views inside the Current View group on the Home tab:



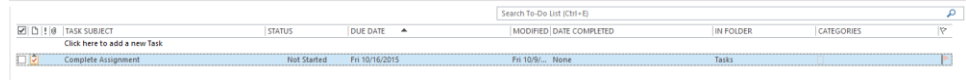
(We have clicked the More arrow to make the entire Current View gallery visible.)

By default the Tasks workspace will use the **To-Do List view**. This will display your tasks in the same way that they appear in the To-Do Bar, but it also includes the ability to arrange them by type, importance, start date, and more:

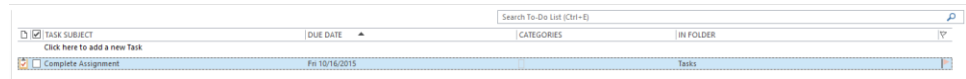


(Note that the Reading pane has been displayed on the right.)

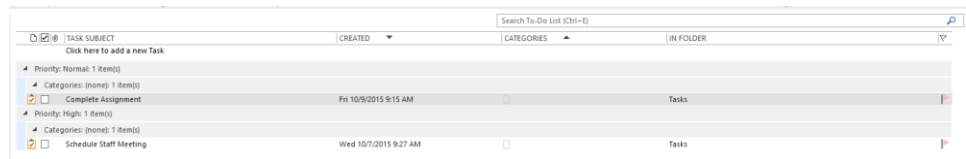
The **Detailed view** will list all tasks. Each entry will include the subject, status, due date, date modified, date completed, folder location, category information, and if the task was flagged for follow-up. You are able to sort the entries by clicking the column headers:



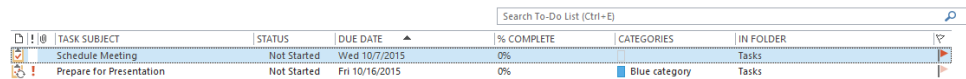
Just as it sounds, the **Simple List view** will list all of the tasks. Unlike the Detailed task view, this task view will only include the subject, due date, category, location, and follow-up flags for each task:



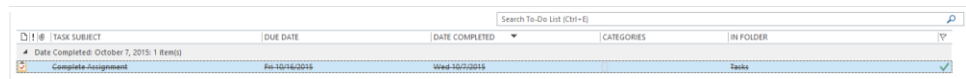
The **Prioritized view** will list your tasks based on their priority:



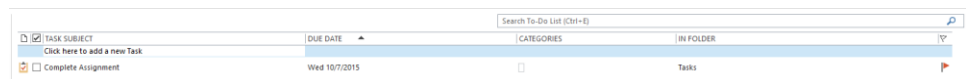
The **Active view** will only list tasks that are ongoing. Each task will include subject information, status, due date, percent complete, location, and category information:



The **Completed view** will display tasks that have been marked as completed. Each task will include the subject, due date, date completed, color category, and folder information:



The **Today view** is used to display only tasks that are due for the current date. Each task includes the subject information, due date, category information, folder location, and follow-up flags:



The **Next 7 Days view** will display any tasks that are due within the next week. This view includes subject information, status, due date, percent complete, category information, location, and follow-up flags:

TASK SUBJECT	STATUS	DUE DATE	% COMPLETE	CATEGORIES	IN FOLDER
Complete Assignment	Not Started	Wed 10/7/2015	0%		Tasks
Schedule Staff Meeting	Not Started	Fri 10/9/2015	0%		Tasks

The **Overdue view** is used to display any tasks that are past their due date. This view includes subject information, status, due date, percent complete, category information, location, and follow-up flags:

TASK SUBJECT	STATUS	DUE DATE	% COMPLETE	CATEGORIES	IN FOLDER
Schedule Staff Meeting	Not Started	Tue 10/6/2015	0%		Tasks

Finally, the **Assigned view** will display any tasks that have been assigned to you by someone else. This view includes the subject information, owner (who assigned the task to you), due date, status, location, and follow-up flags.

SERVER TASKS

Outlook 2016 can be synchronized with Project 2016 and SharePoint Server to assign tasks amongst an organization. Microsoft Exchange Server also supports task assignment and management.

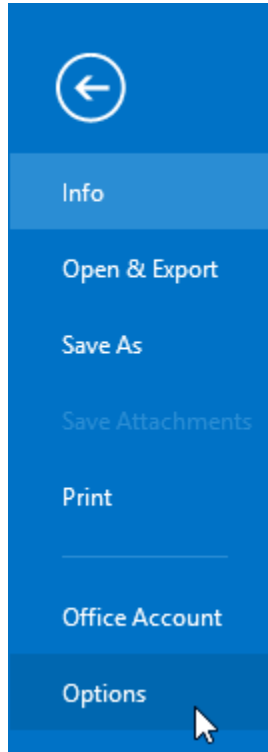
The **Server Tasks view** will show you any tasks that have been assigned to you via one of these services:

TASK SUBJECT	ASSIGNED TO	CUSTOM STATUS	CUSTOM PRIORITY	DUE DATE	IN FOLDER
Schedule Staff Meeting				Tue 10/6/2015	Tasks
Complete Assignment				Wed 10/7/2015	Tasks

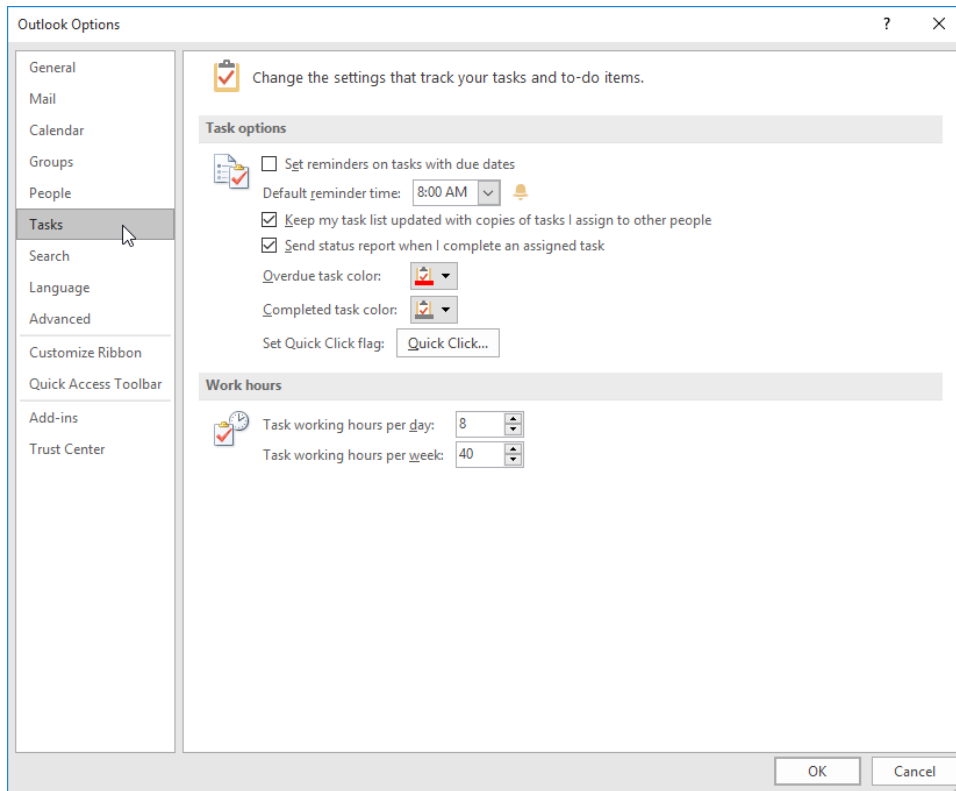
You can see each task's subject information, who they have been assigned to, status, priority level, due date, and folder location.

TASK OPTIONS

To configure many of the settings that control how tasks are created and displayed, you need to open the Outlook Options dialog box. To do this, click File → Options:



With the Outlook Options dialog box displayed, click the Tasks category. You will see that this category includes two sections:



The “**Task options**” section includes controls to customize how reminders are set, when status reports are sent, and task coloring options. The “**Work hours**” section is used to control the total work hours that you typically have in a day and over the average week.

PRINT TASKS

To print tasks, open the Tasks workspace and then click File → Print. With the Print category of Backstage view open, examine the Settings section. You will see that there are two print styles to choose from: Table Style and Memo Style.

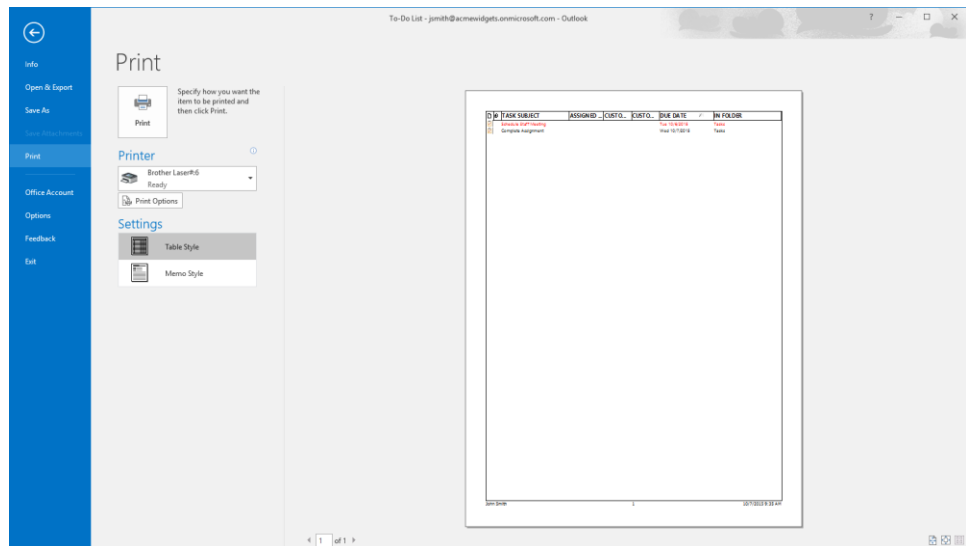
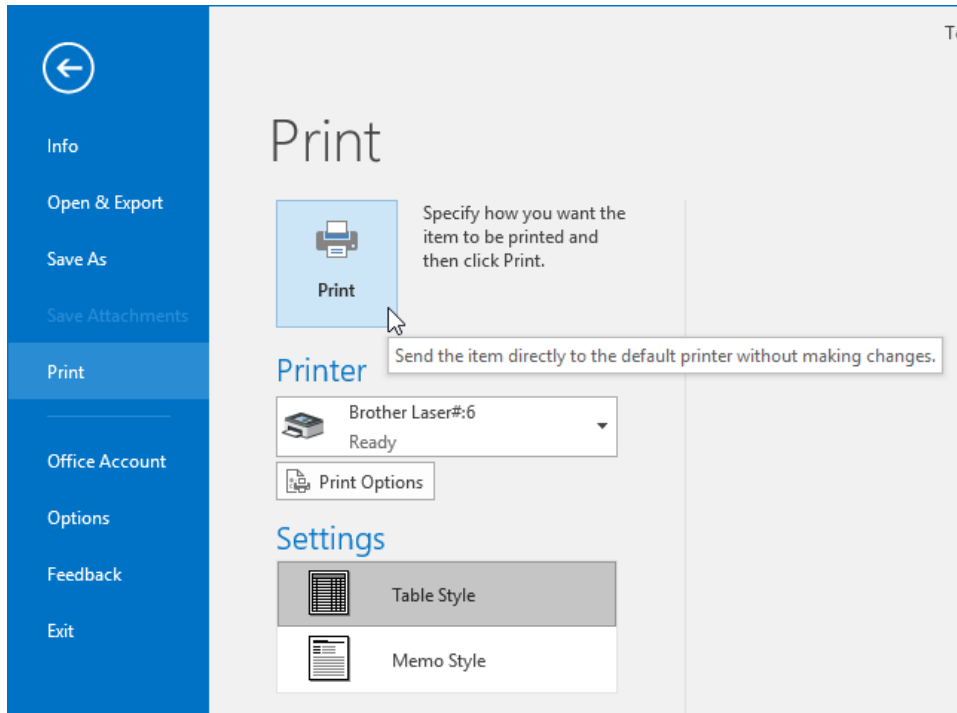


Table Style will print a list of all the tasks that you have assigned to you. It will include information like the task subject, who it is assigned to, due dates, and other information. The **Memo Style** will print the currently selected task in a memo-like fashion. This style is great if you would like to print all of the information that you have about one particular task.

Once you have chosen a print style, ensure that the appropriate printer is selected via the Printer drop-down command. Next, click the Print command:



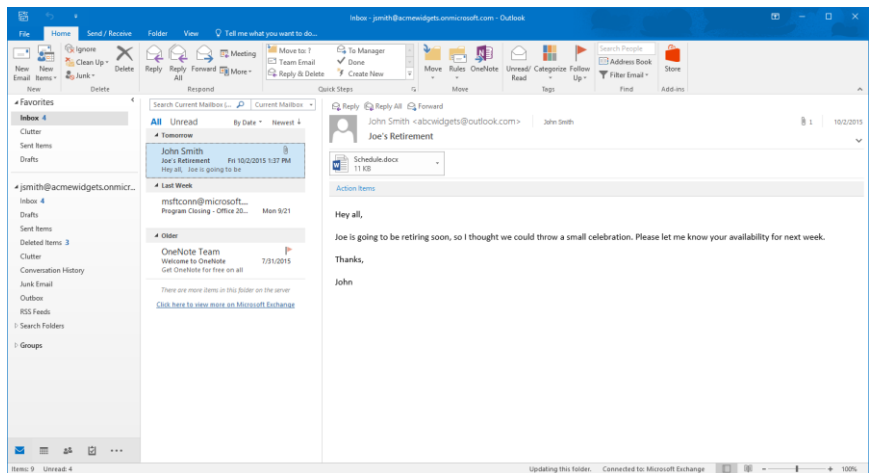
The data will then be sent to the printer and you will be returned to the Tasks workspace.

ACTIVITY 7-1

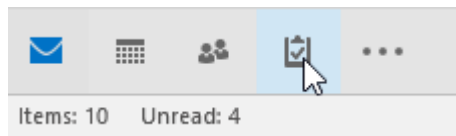
Creating Tasks

You team has been assigned a new project. You would like to add a task to Outlook 2016 that has been delegated to you by the project manager. A printer is required to complete this activity.

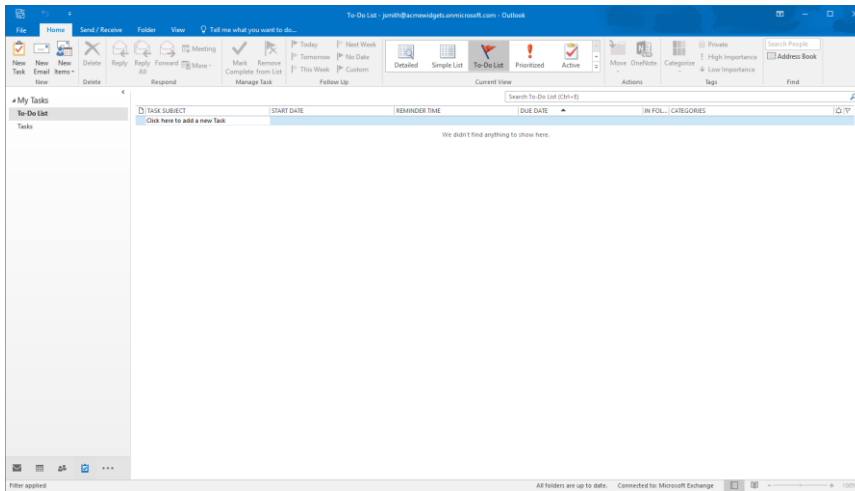
1. To begin, open Outlook 2016:



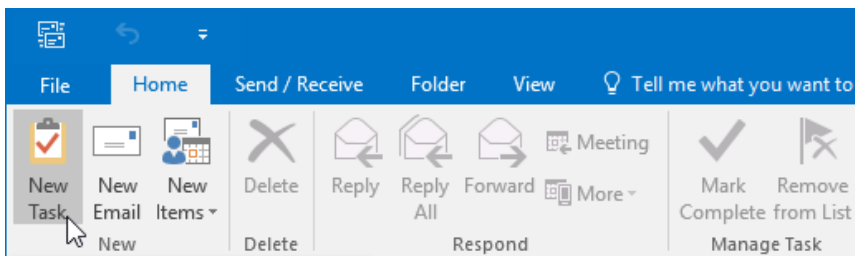
2. Display the Tasks workspace by clicking the Tasks button in the Navigation pane:



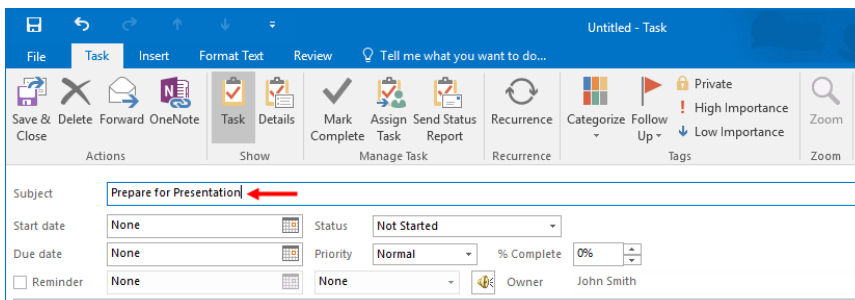
3. The Tasks workspace will now be displayed:



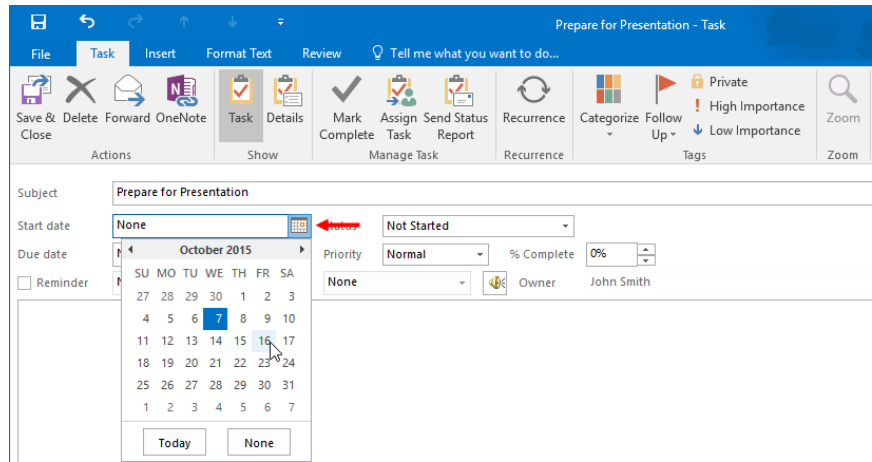
4. Create a new task by clicking Home → New Task:



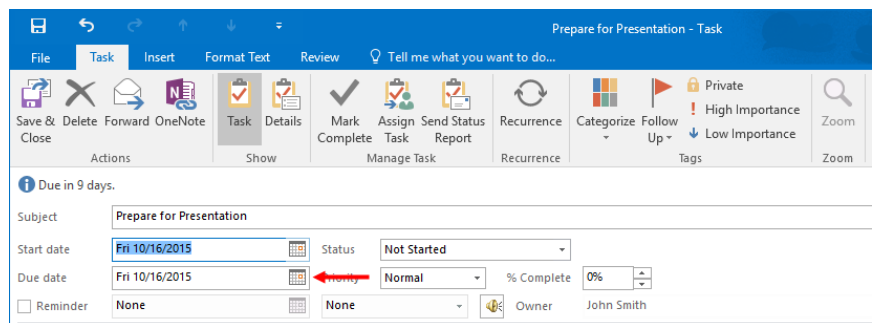
5. The Task form will now be displayed. In the Subject field, type "Prepare for Presentation:"



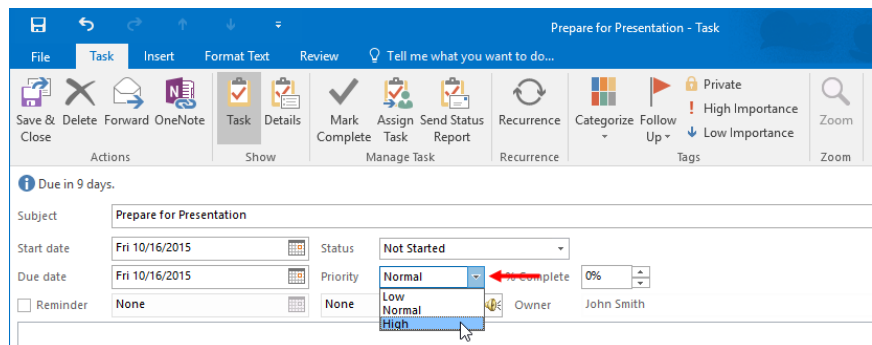
- Click the “Start date” drop-down menu and choose next Friday:



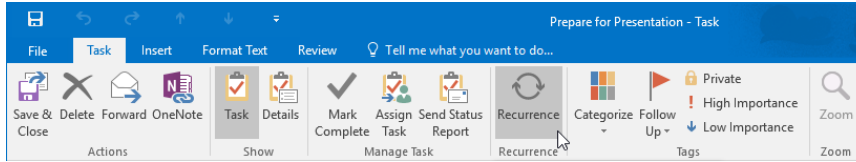
- You will see that the “End date” drop-down menu will automatically update to the same date as the one that was entered into the “Start date” field:



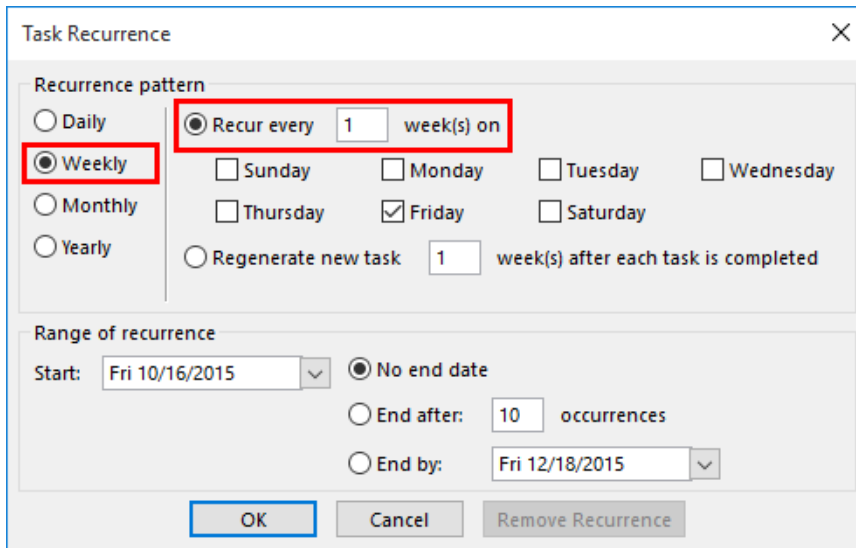
- Click the Priority drop-down menu and click High:



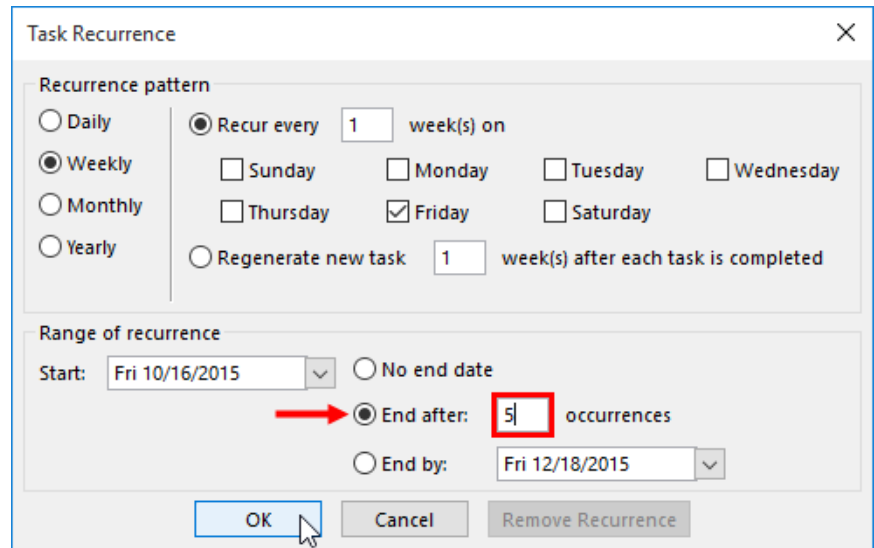
9. You need to make this task reoccur on a weekly basis. Click Task → Recurrence:



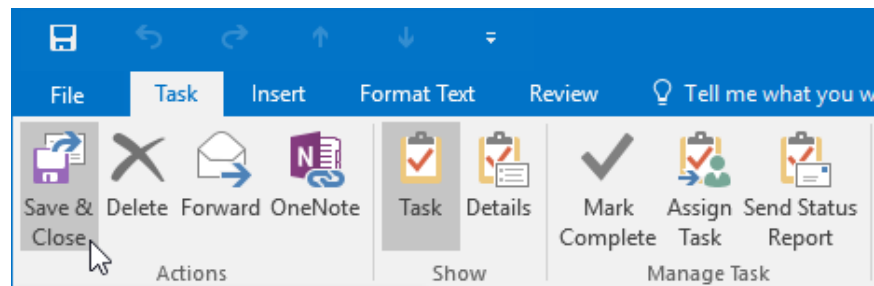
10. The Task Recurrence dialog box will now be displayed. Ensure that the Weekly radio button is selected and the “Recur every” text box is set to 1:



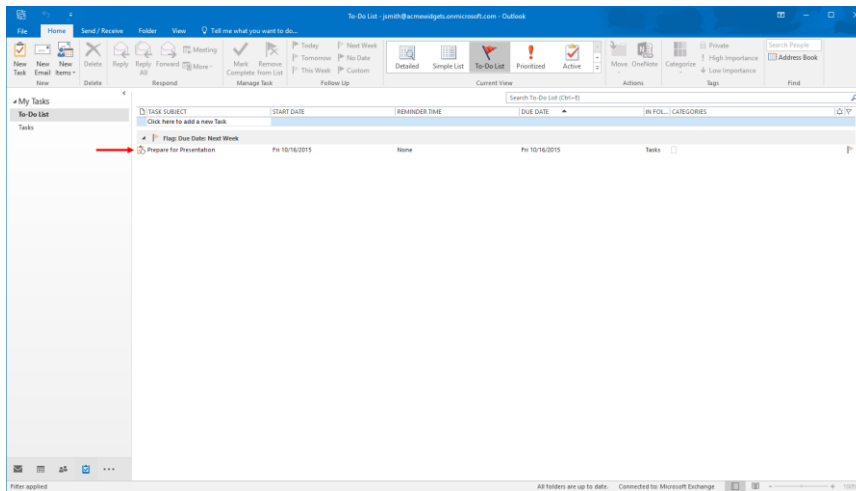
11. Click the “End after” radio button and enter “5” into the adjacent text box. Click OK:



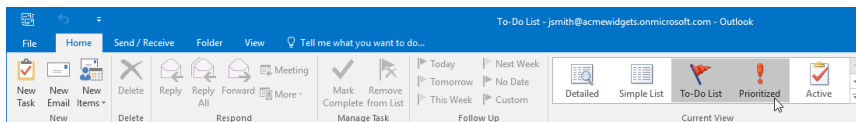
12. With the Task form now complete, click Task → Save & Close:



13. Returning to the Tasks workspace, you will see the new task that you just created:



14. Apply the Prioritized task view by clicking Home → Prioritized:

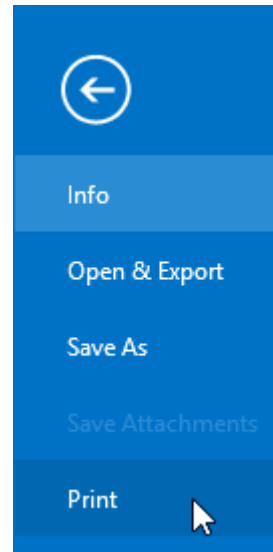


(You may need to expand the Current View gallery to see this view.)

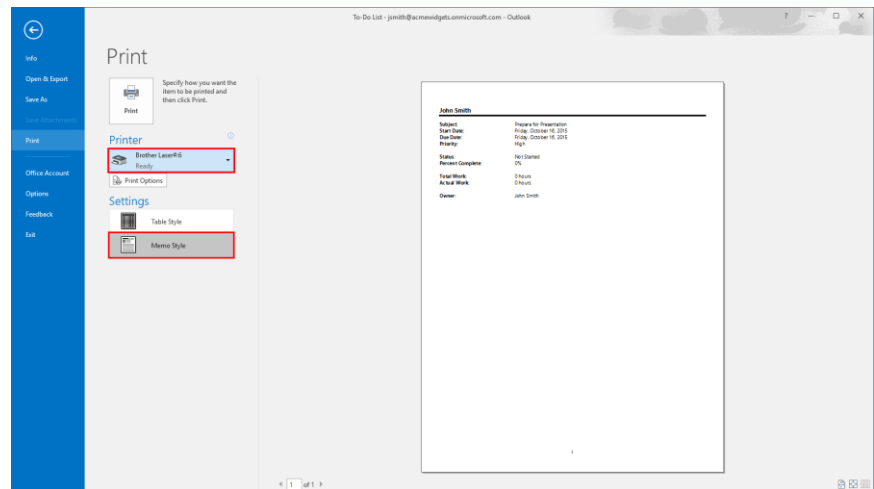
15. With the Prioritized task view applied, you will see the task that you just created in the Priority, High group. Click to select this task:



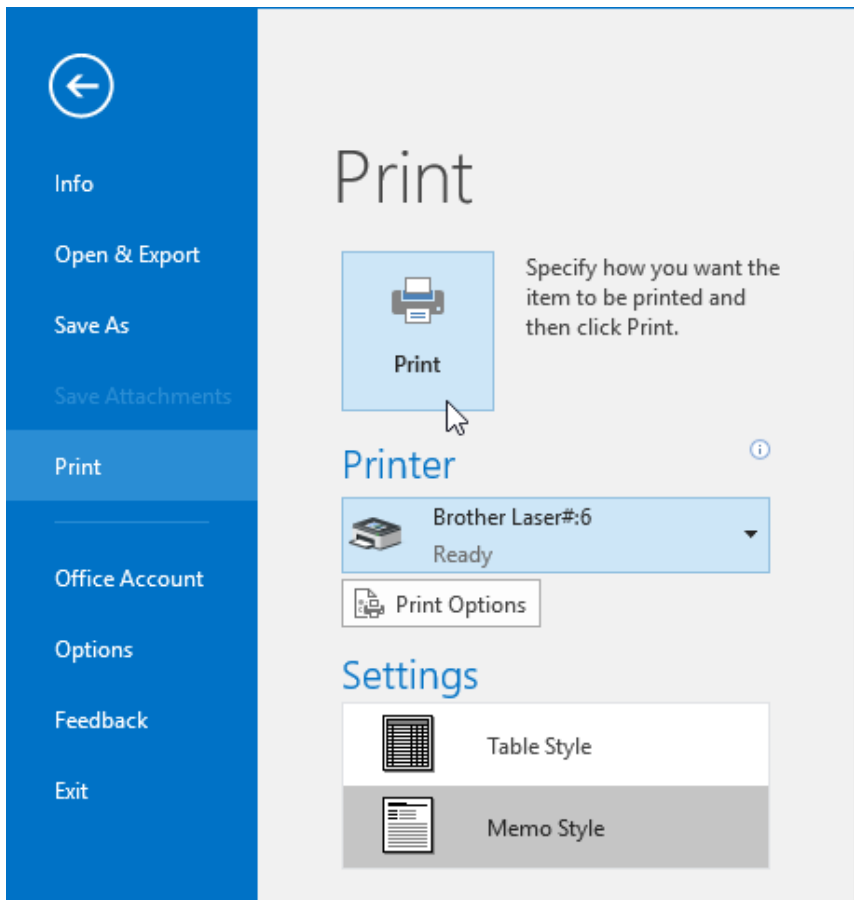
16. Click File → Print:



17. With the Print category of Backstage view now displayed, you will see a preview of how the selected task will look on the printed page. Ensure that that the Memo Style is selected and that the printer that you would like to print to is selected from the Printer drop-down command:



18. Click the Print command:



19. The selected task will now be printed. Close Microsoft Outlook 2016.

TOPIC B: Manage Tasks

As the number of tasks that you schedule grows, the ability to manage them becomes more and more important. Over the course of this topic, you will learn how to find the exact tasks that you would like to work with, assign tasks, tag tasks, and more.

Topic Objectives

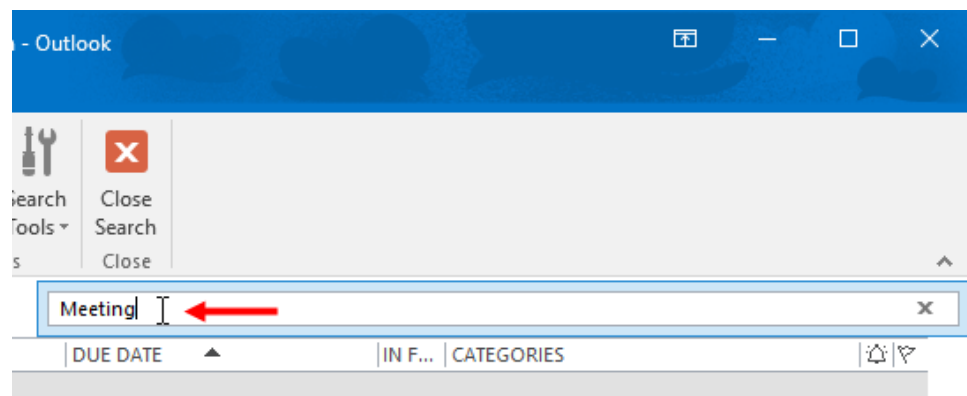
In this topic, you will learn:

- How to search tasks
- How to assign, tag, and move tasks
- How to mark a task as complete

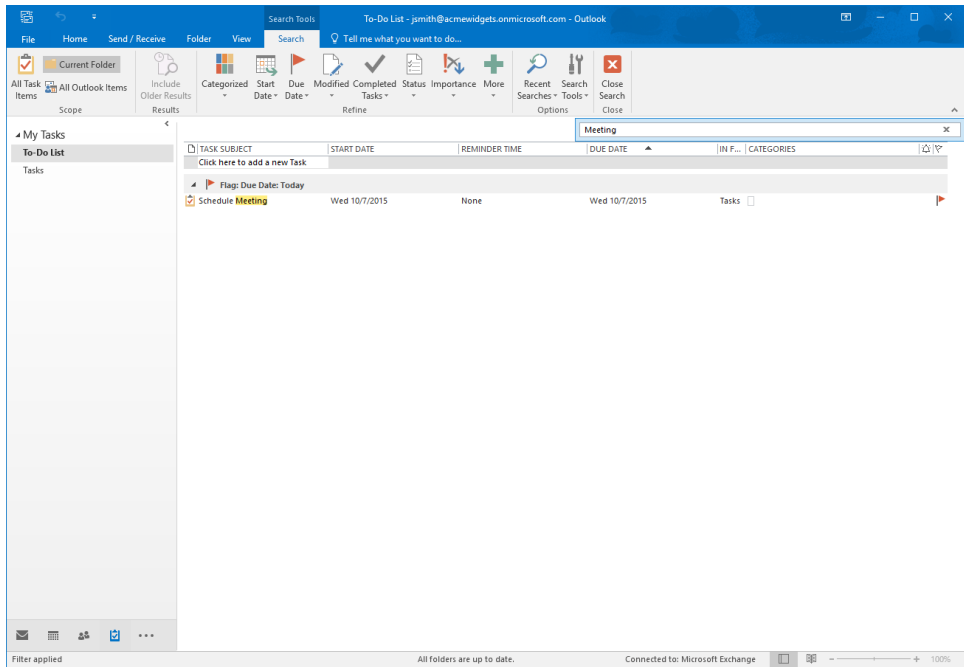
SEARCHING TASKS

With a long task list, it can become difficult to find a specific task that you would like to work with. To make finding specific tasks easier, a search field has been provided near the top right-hand corner of the Tasks workspace.

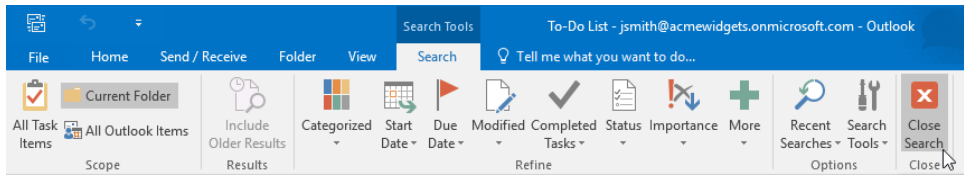
To use this feature, first click inside the field (or press Ctrl + E) and type the keywords that you would like to search for:



A list of results will immediately be shown that you can then work with:

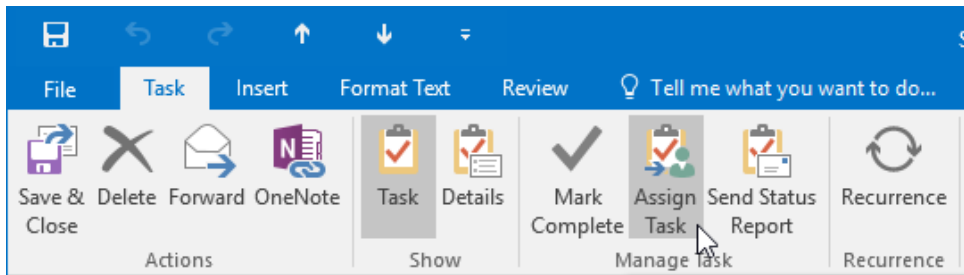


Additionally, the Search Tools – Search contextual tab will be displayed on the ribbon. Here, you can narrow down your search even further by adding more search criteria (like due date or importance). When you have finished searching, click Search Tools – Search → Close Search:



ASSIGN TASKS

To assign a task to another person, create a new task and then click Task → Assign Task:



The Task form will now include the To field. Here, you can enter the e-mail address of the person who will be assigned this task. You can also specify if you want to keep a copy of the task in your list and if you want to receive a status report when the task is complete:

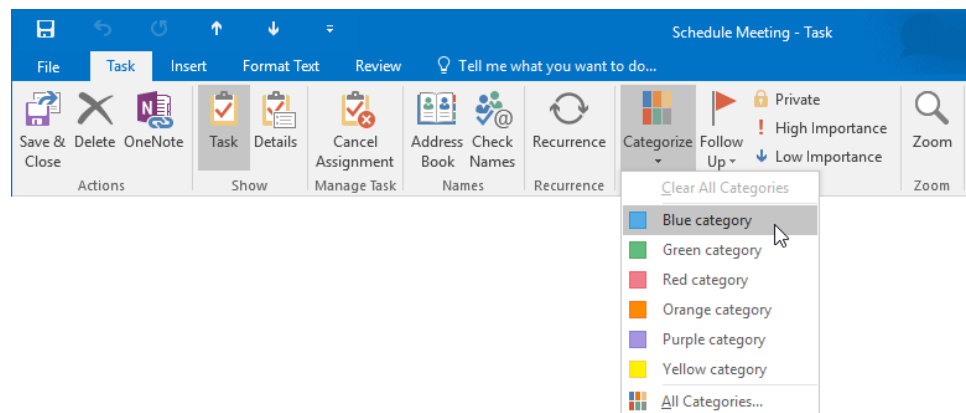
The screenshot shows the Outlook 'Task' ribbon with the 'Task' group selected. The task form is titled 'Schedule Meeting - Task'. The 'To...' field contains 'Jane Gibson'. The 'Subject' is 'Schedule Meeting'. The 'Start date' and 'Due date' are both 'Wed 10/7/2015'. The 'Status' is 'Not Started' and the 'Priority' is 'Normal'. The '% Complete' is '0%'. Two checkboxes are checked and highlighted with a red box: 'Keep an updated copy of this task on my task list' and 'Send me a status report when this task is complete'.

When you are done, click Send to assign the task. Or, click Save & Close to save the task and send it at another time.

TAGGING TASKS

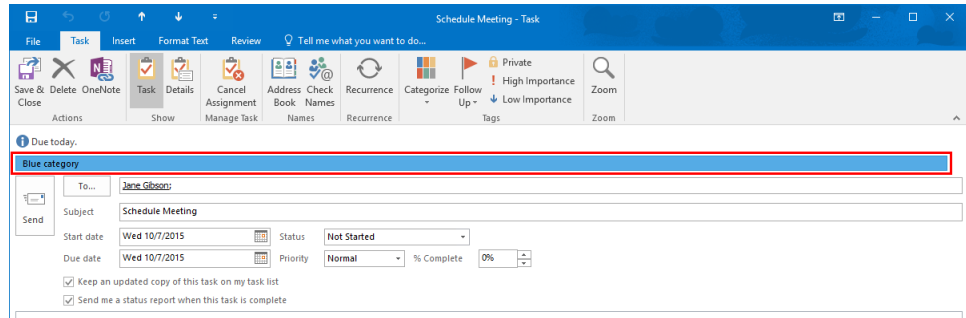
Categorizing Tasks

To help keep your tasks organized, you are able to assign color categories to them. To categorize a current task, click Task → Categorize → [Color Category]:



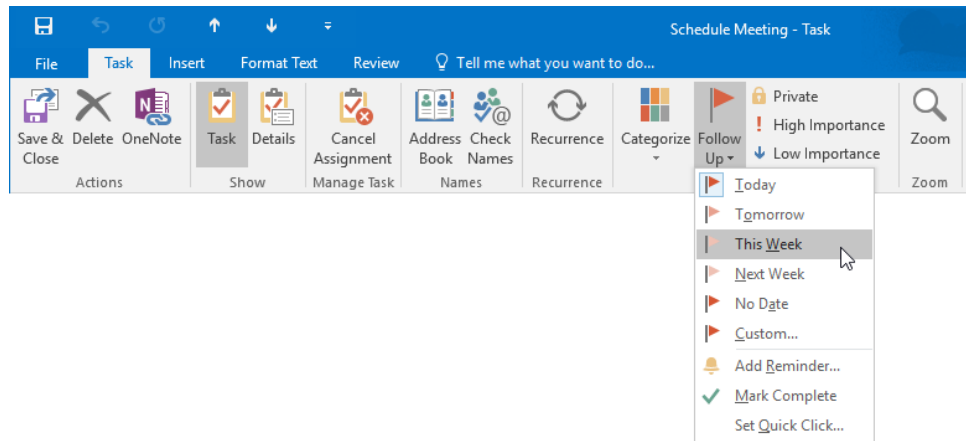
(Remember, when choosing a category for the first time, you will be prompted to give it a name.)

Once a category has been applied, you will see it displayed just below the ribbon:

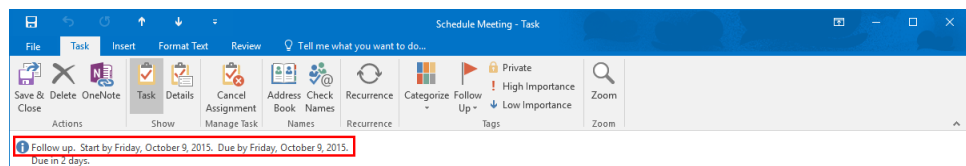


Flagging a Task for Follow Up

If you need to follow up on a task, you can flag it for follow-up. To do this, click Task → Follow Up → [Flag]:

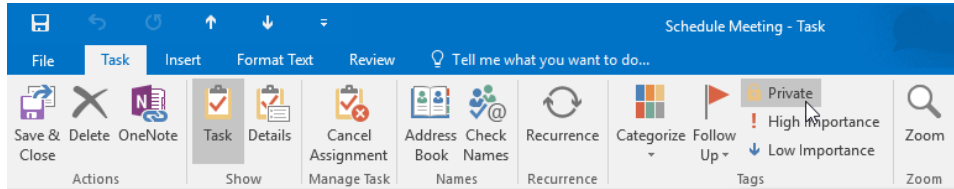


Once a follow-up flag has been applied, you will see a follow-up statement appear just below the ribbon:



Marking a Task as Private

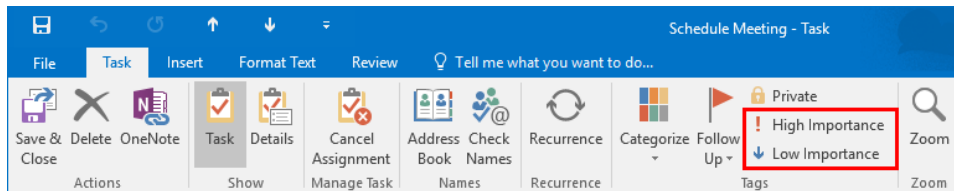
If you are using Microsoft Exchange Server and you do not want a task's details to be viewable by others, you can mark it as private. To do this, click Task → Private:



Following this action, the Private button will appear shaded in to indicate that it has been marked private.

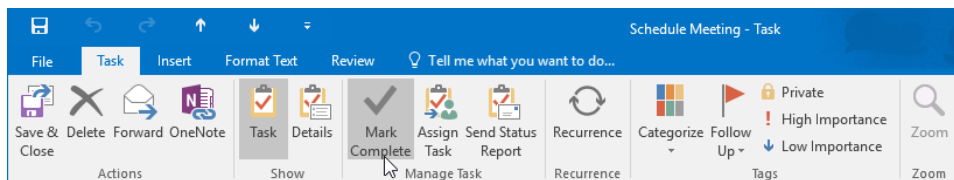
Applying a Priority Level

Priority levels help indicate how important a particular task is so that you can delegate your time more efficiently. You have the option to mark a task as High Importance or Low Importance. Both options are in the Tags group of the Task tab:

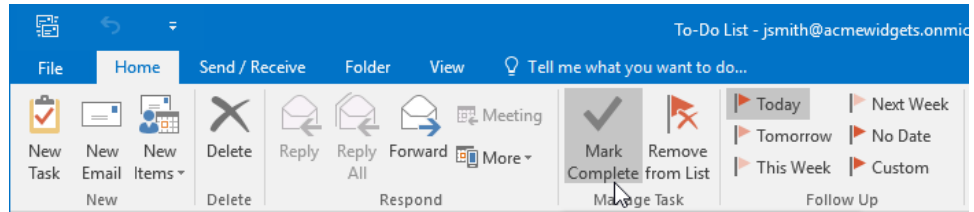


MARKING A TASK AS COMPLETE

Once you have finished a task that has been assigned to you, you should mark it as complete. To do this, click Task → Mark Complete with the task open:



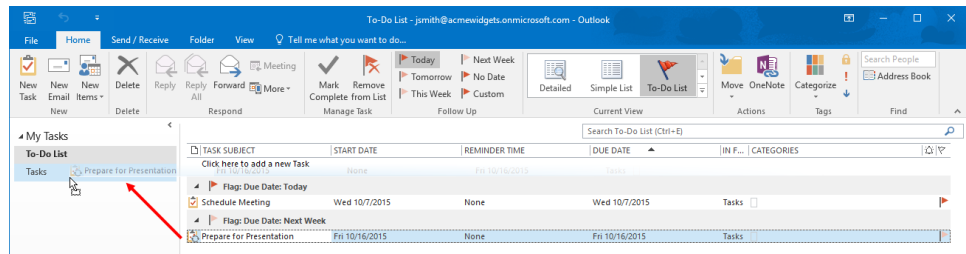
Alternatively, you can mark a task as complete from the Tasks workspace by clicking to select that task and then clicking Home → Mark Complete:



The selected task will then be removed from the To-Do List. Its subject line will have a strikethrough to indicate that it is done.

MOVING TASKS

To move a task from one folder to another, click and drag the task in question from the workspace into the destination folder in the Navigation pane:



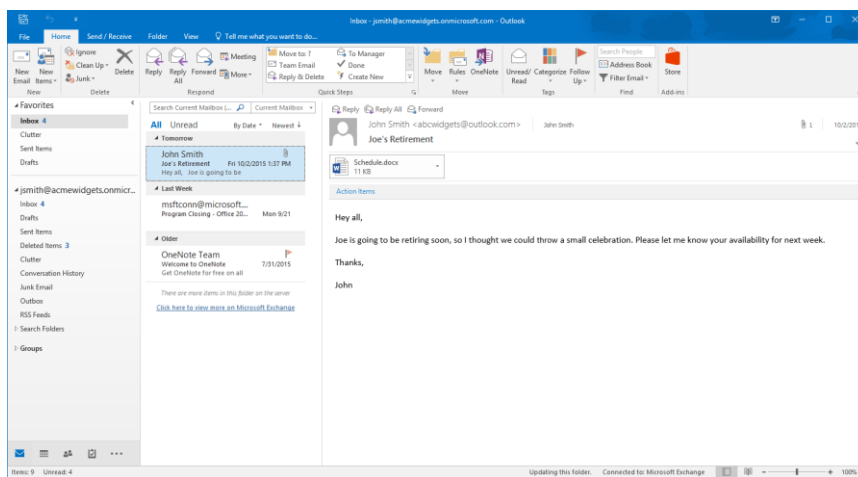
Releasing your mouse button will complete the move.

ACTIVITY 7-2

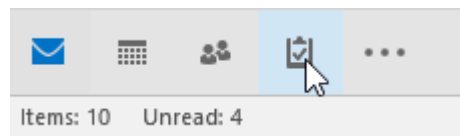
Managing Tasks

Now that your Tasks workspace has become populated with new tasks, you would like to manage them. Students will need to have created one task with “presentation” somewhere in its subject before starting this activity.

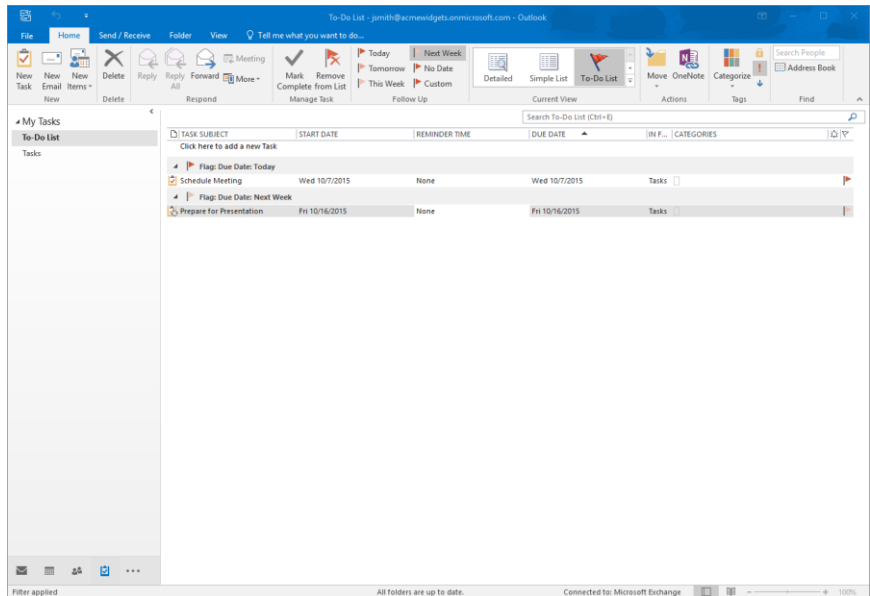
1. To begin, open Outlook 2016:



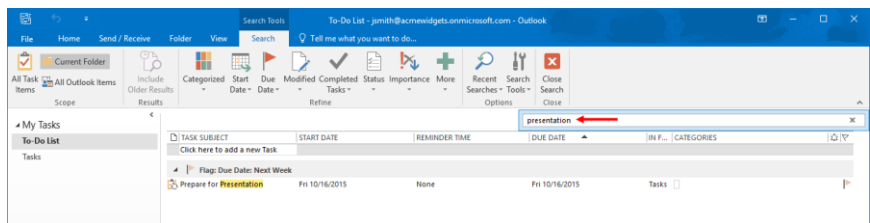
2. Display the Tasks workspace by clicking the Tasks button in the Navigation pane:



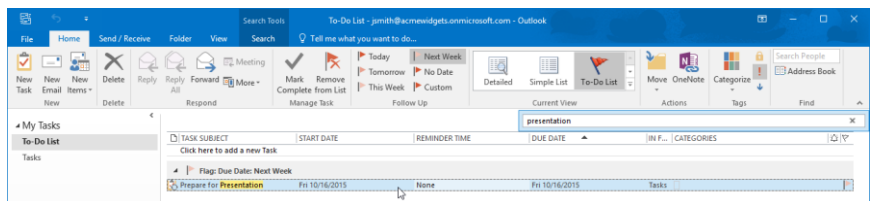
3. The Tasks workspace will now be displayed:



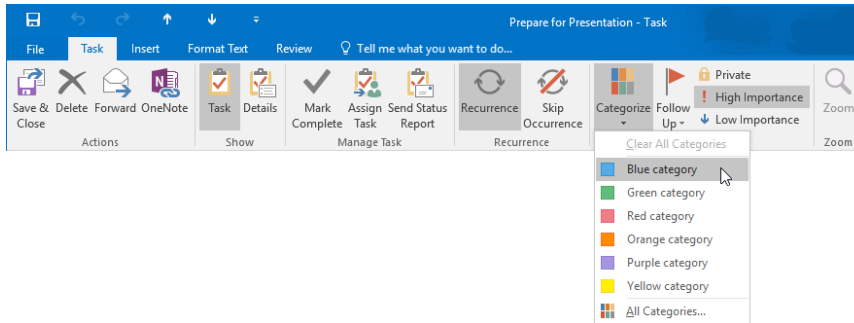
4. Press Ctrl + E to focus on the search text box. Type “presentation” and the results will immediately be displayed:



5. Double-click the top-most result:

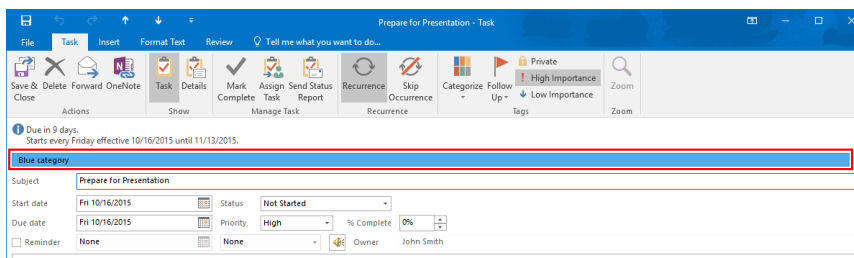


- The task will now be open in the Task window. Categorize this task using the blue category by clicking Task → Categorize → Blue Category:

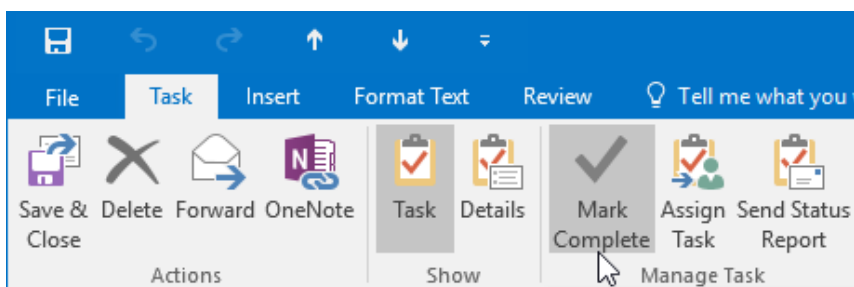


(If you are prompted to rename the category, click Yes to proceed.)

- You will see the blue category shown above the To field:



- Now mark this task complete by clicking Task → Mark Complete:



- Close the Task window and then close Microsoft Outlook 2016 to complete this activity.

TOPIC C: Manage Notes

Outlook 2016 provides you with a quick way to record, view, and manage short notes. In this topic, you will learn all about notes in Outlook 2016 and how to manage them.

Topic Objectives

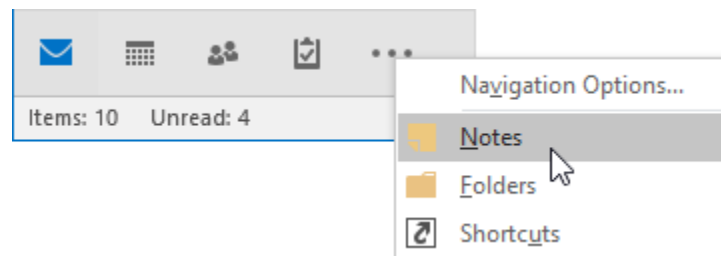
In this topic, you will learn:

- About notes and the Note form
- About note views
- How to categorize notes
- How to print notes

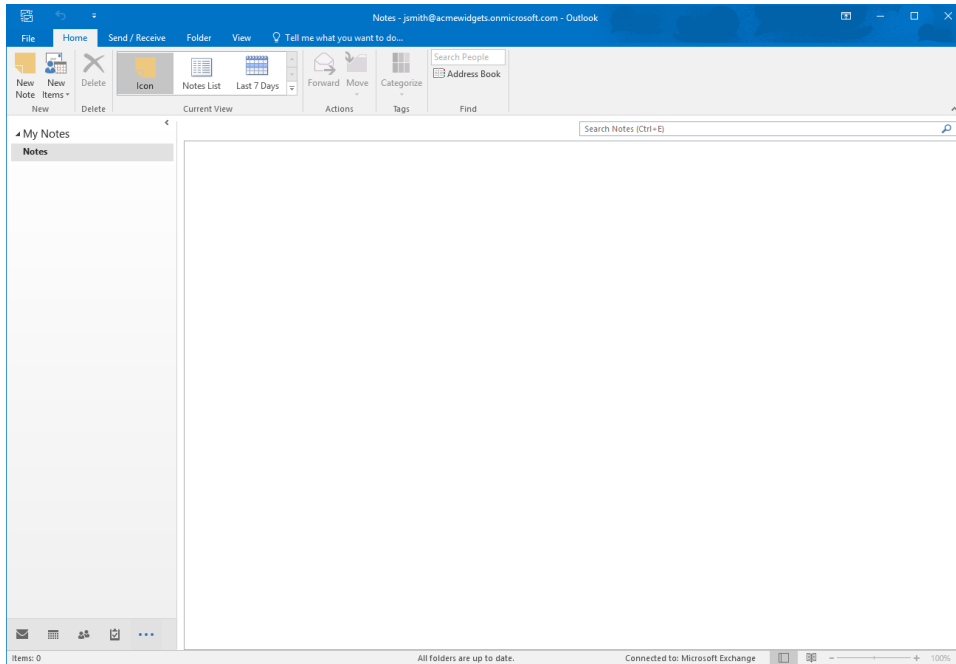
NOTES

Outlook's notes are quite similar to traditional sticky notes in their format and function. They allow you to record small bits of information that you might need to refer to later. For example, you could use a note to record a list of items that you need to pick up for an upcoming project or presentation.

All notes in Outlook are stored and managed in the Notes workspace. This is opened by clicking the More button at the bottom of the Navigation pane and then clicking the Notes option:

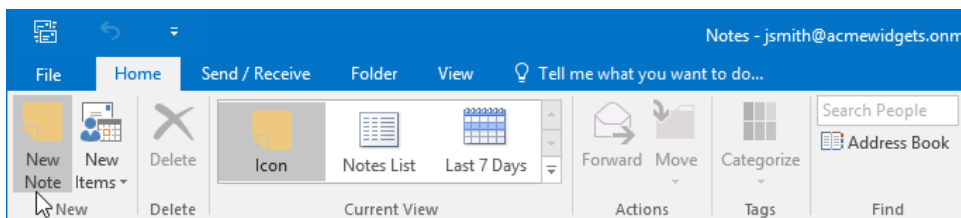


The Notes workspace will list any notes that exist. You will also see tools to create new notes:

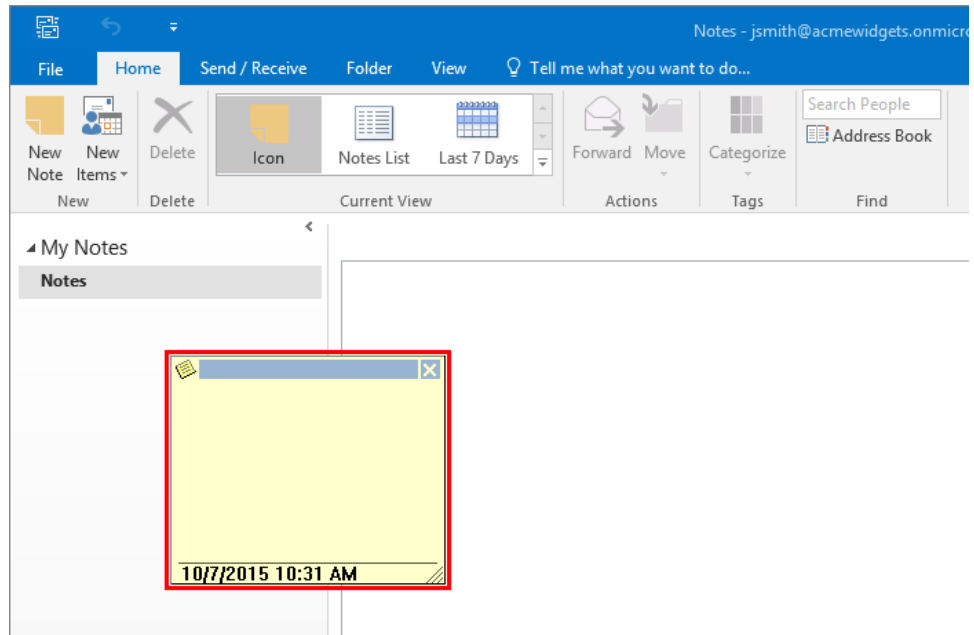


NOTE FORM

To create a new note, click the New Note command on the Home tab while in the Notes workspace:

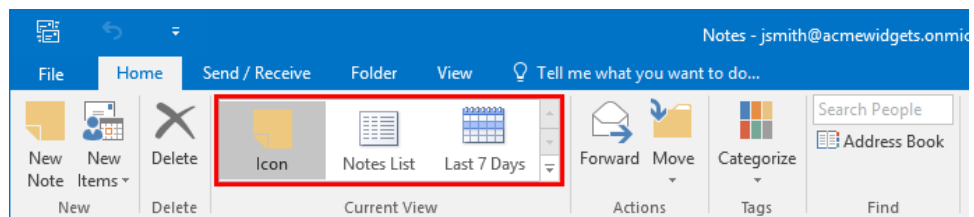


A new note will appear over the Outlook 2016 interface. At the bottom of the note will be the current date as well as the current time. Simply click and type to create the note:

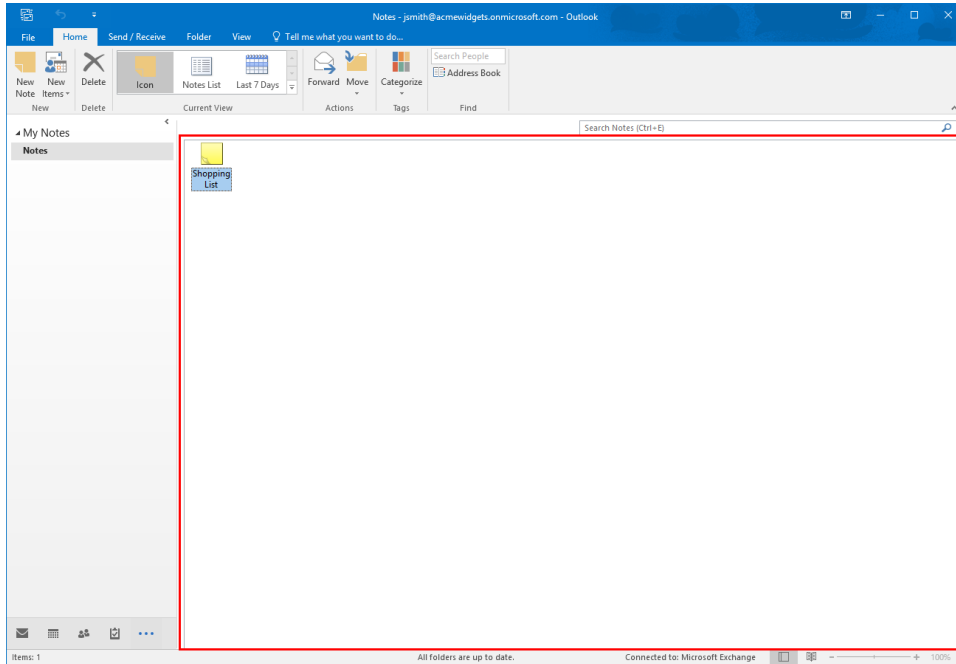


NOTE VIEWS

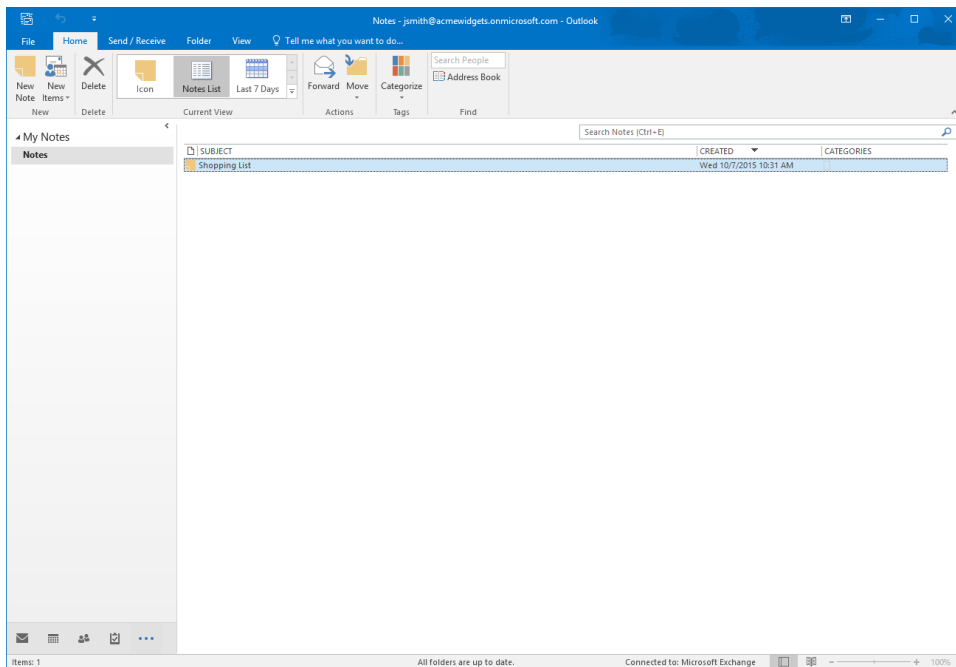
There are a few different views that are used to change how notes are displayed in the Notes workspace. You can find all of these different views inside the Current View group on the Home tab. Clicking on any of these views will apply them:



By default the **Icon view** will display all of your notes as small icons and arrange them in a grid. Each icon will display the first line from the note that it represents:



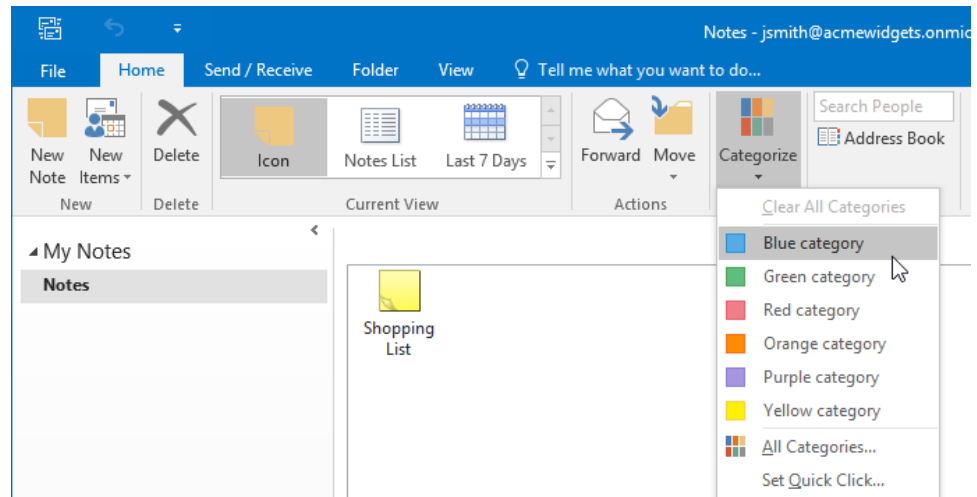
The **Notes List view** will display all of your notes as a simple list. Each item will include the first line from the note as a subject line, the date the note was created, and any categories that the note belongs to:



Finally, the **Last 7 Days view** will list notes that have been created in the past week in list form (similar to the Notes List view).

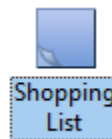
CATEGORIZING NOTES

Like other objects in Outlook 2016, you are able to categorize notes to help keep them organized. To begin, first click to select the note from the Notes workspace. Then, click Home → Categorize → [Category]:



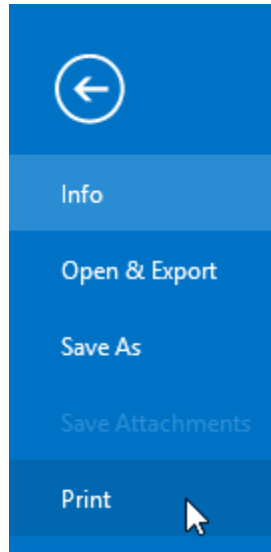
(Remember, when choosing a category for the first time, you will be prompted to give it a name.)

Once a note has been categorized, the color category that you selected will be applied to the note and its associated icon:

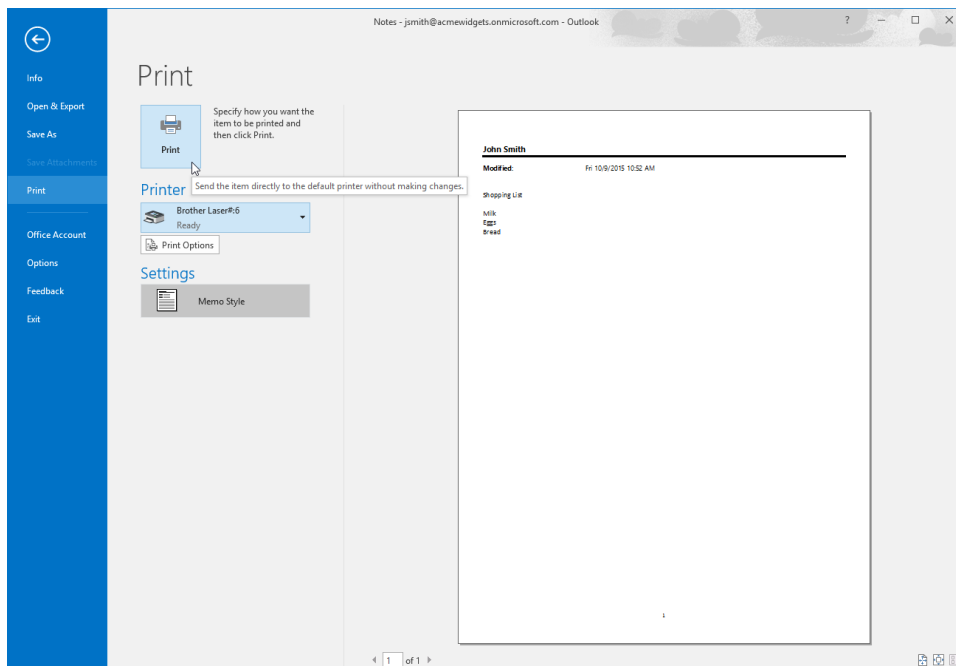


PRINTING NOTES

To print one or more notes, first click to select the note(s) that you would like to print from the Notes workspace. Next, click File → Print:



With the Print category of Backstage view selected, you will see a preview of how the selected note(s) will appear on the printed page. Ensure that you have the correct printer selected in the Printer drop-down menu and then click the Print command:



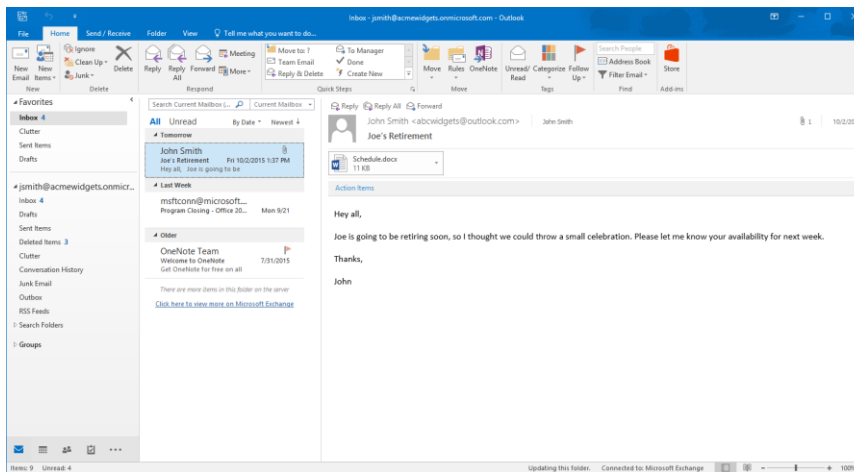
Note that there is only one print style: **Memo Style**. This will print the selected note in a memo-like fashion. This means that the printout will include the name of who created the note, when the note was last modified, and the contents of the note.

ACTIVITY 7-3

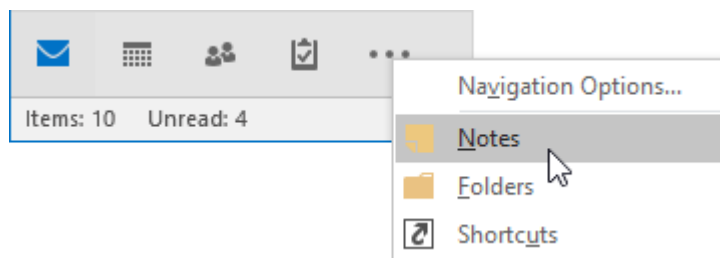
Creating and Managing Notes

To prepare for an upcoming presentation, you would like to create a note that includes what items you need to purchase.

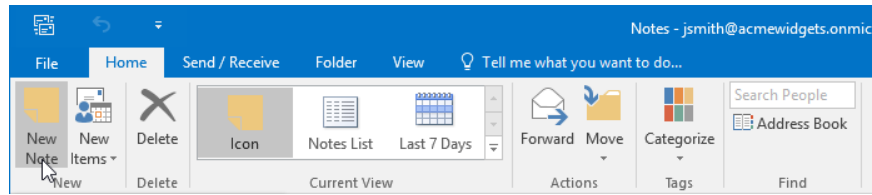
1. To begin, open Microsoft Outlook 2016:



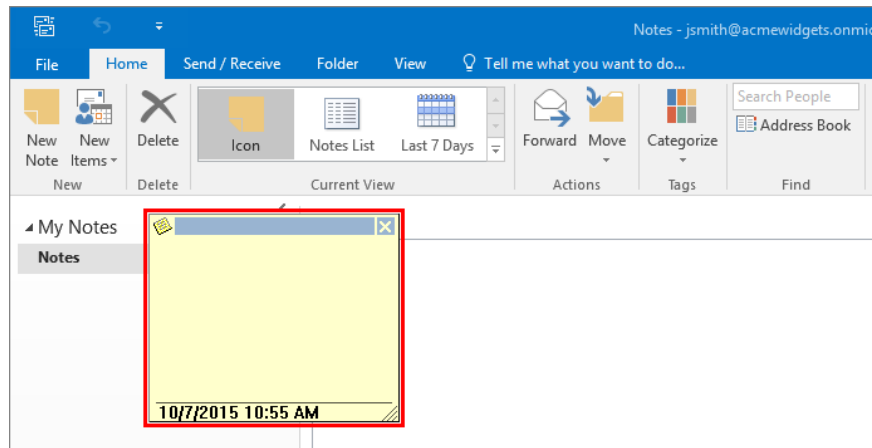
2. Display the Notes workspace by clicking the More button in the Navigation pane and then clicking the Notes button:



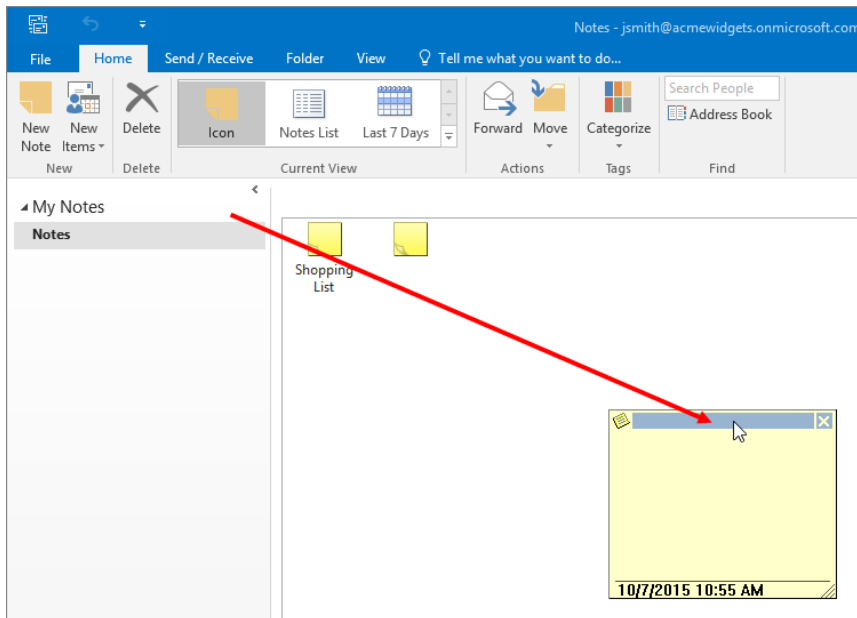
3. Create a new note by clicking Home → New Note:



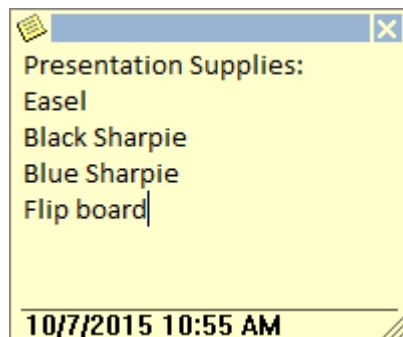
4. A new note will appear over the Outlook 2016 interface in a type of dialog box. At the bottom of the note will be the current date as well as the current time:



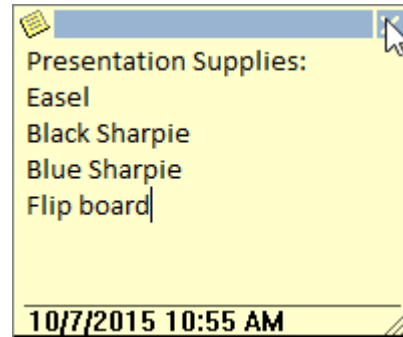
5. If you wish, you can click and drag this note by the title bar to move it to a new location:



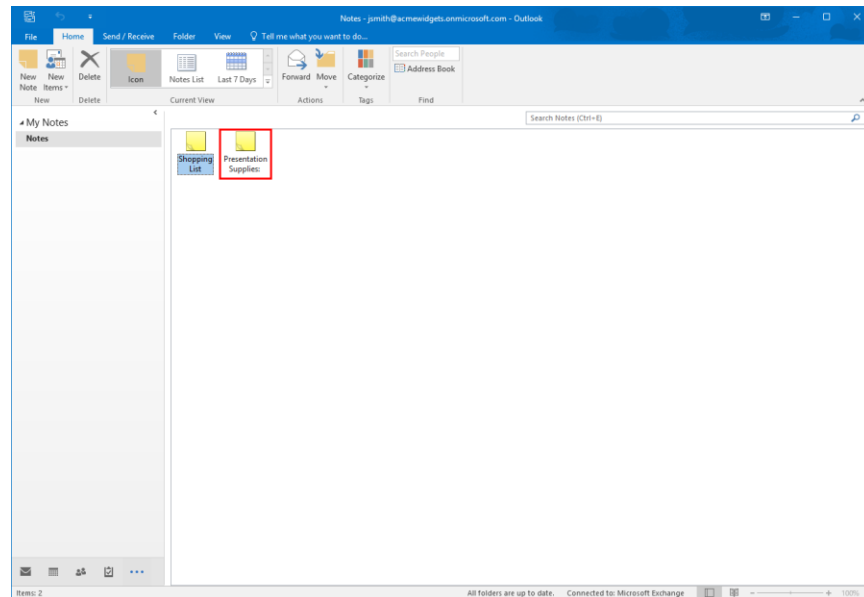
6. To start adding the content of the note, click inside of it and then start typing. For this example, type the following:



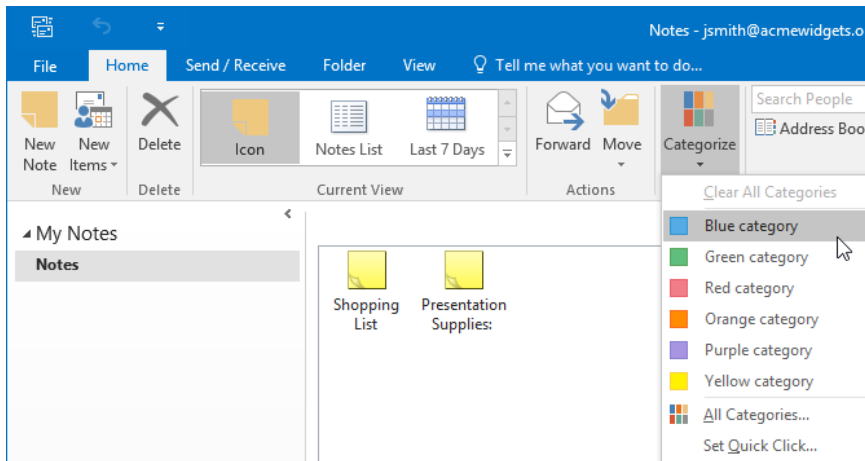
7. After you have finished recording the new note, click the Close button in its top right-hand corner:



8. Returning to the Notes workspace, you will see the new note listed:

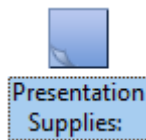


9. With the note that you just created selected in the Notes workspace, click Home → Categorize → Blue Category:

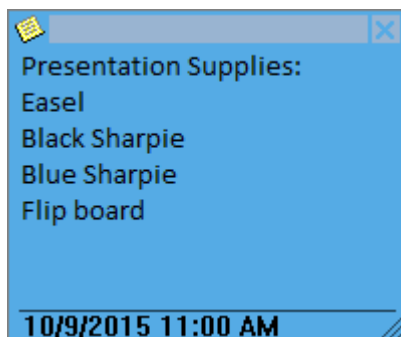


(If you are prompted to rename the category, click Yes to proceed.)

10. The selected note will now be categorized using the blue category:



11. Double-click on this note. You will see that the applied category color will also be represented by the note itself:



12. Close the open note and then close Microsoft Outlook 2016.

Summary

Over the course of this lesson you learned how to work with and manage tasks and notes. You should now be comfortable creating simple tasks, as well as managing them using the Tasks workspace. Additionally, you should be comfortable with the concept of notes in Outlook 2016, as well as how to create and manage them. You should also be familiar with the different ways that you can print both of these objects, as well as view them in their respective workspaces.

REVIEW QUESTIONS

1. **What is a server task?**
2. **What is the default reminder time for a task?**
3. **What is the command sequence to assign a task to someone else?**
4. **How do you move a task from one task list to another?**
5. **How do you open the Notes workspace?**

LESSON 8: CUSTOMIZING THE OUTLOOK ENVIRONMENT

Lesson Objectives

In this lesson you will learn how to:

- Customize the Outlook interface
- Create and manage Quick Steps

TOPIC A: Customize the Outlook Interface

Now that you are comfortable with the features and general interface in Outlook 2016, you can begin to customize it to suit your individual requirements. Over the course of this topic you will learn about the various ways that you can customize the Outlook interface.

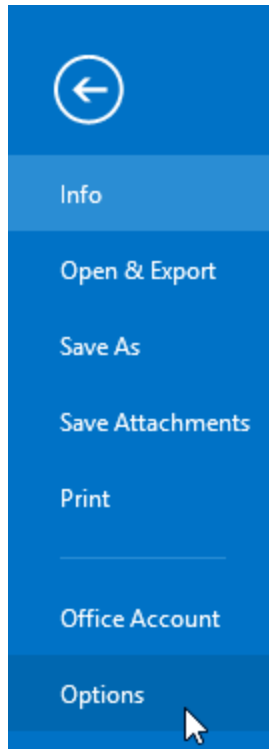
Topic Objectives

In this topic, you will learn:

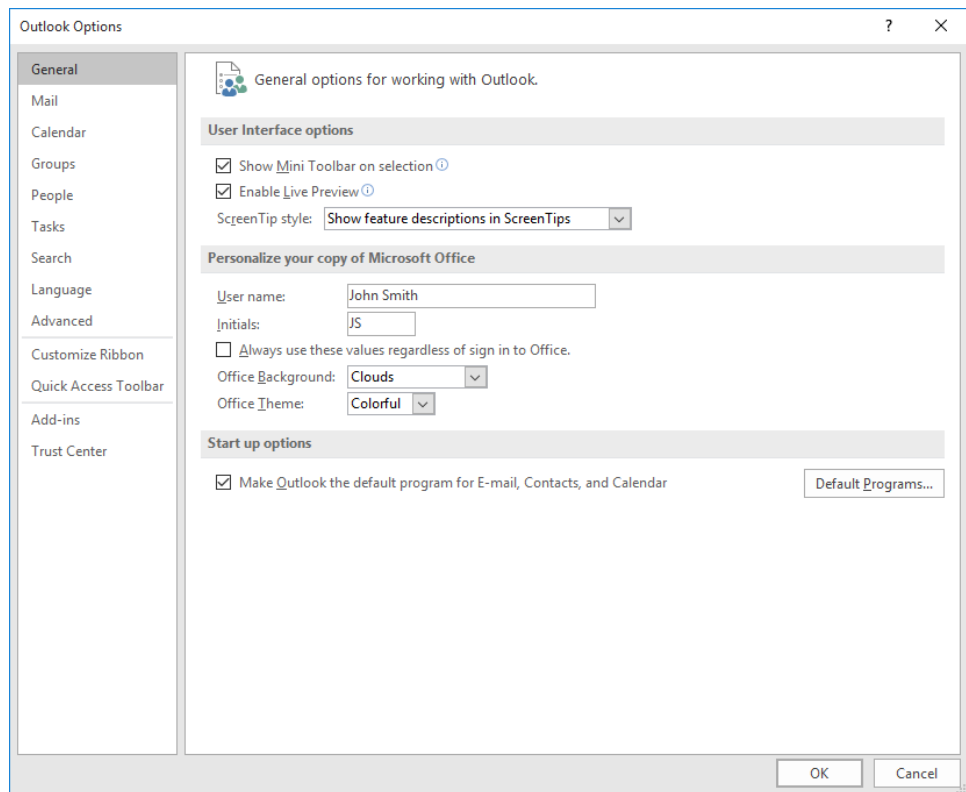
- How to set general Outlook options
- How to customize and move the Quick Access toolbar
- How to minimize and customize the ribbon interface
- How to reset interface customizations

SETTING GENERAL OUTLOOK OPTIONS

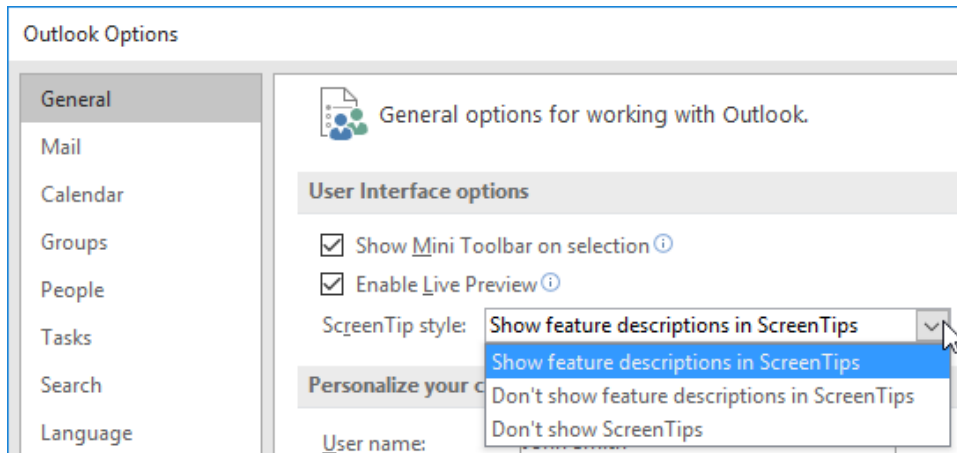
Outlook's customization options are found in the Outlook Options dialog. To access this dialog, click File → Options:



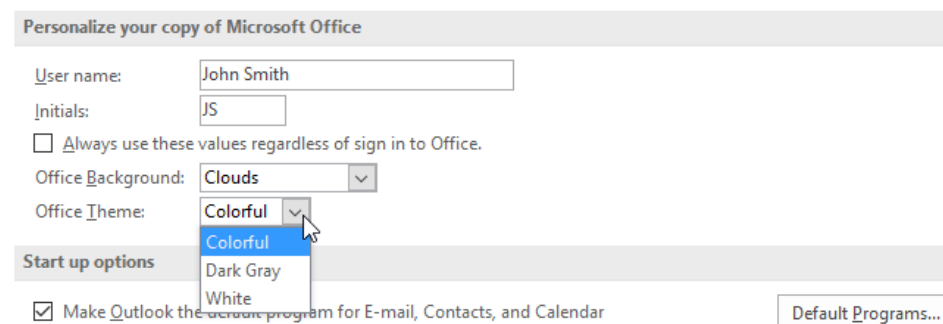
Next, ensure that the General category is displayed:



Inside the “User Interface options” section, you will see checkboxes to disable the mini toolbar and Live Preview. In addition, the “ScreenTip style” drop-down menu allows you to control how ScreenTips are displayed. By default, ScreenTips will display the title of the command, as well as a brief description about what it does. However, you have the option to hide these descriptions or even disable ScreenTips entirely:



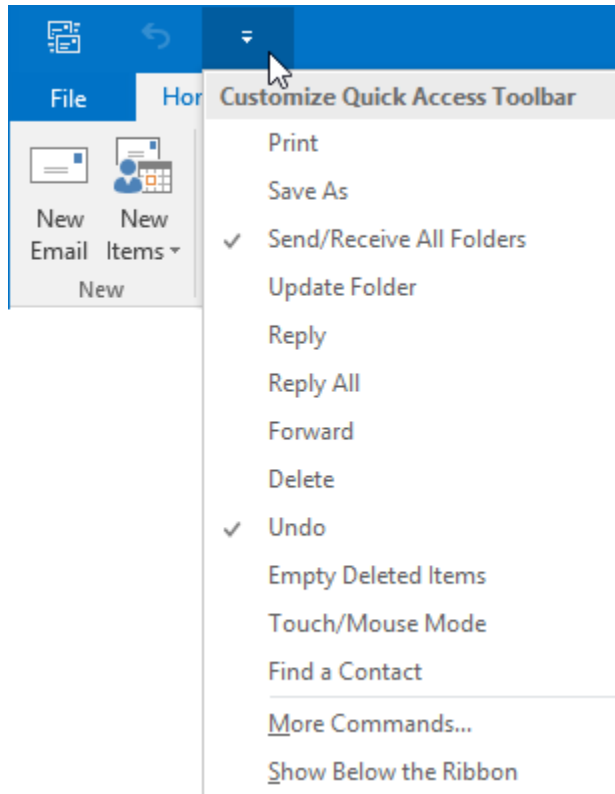
Inside the “Personalize your copy of Microsoft Office” section, you are able to choose the user name and initials that you would like to be associated with your copy of Microsoft Office. As well, you can change the Office theme that the Outlook interface uses from colorful (the default) to dark gray or white, and modify the Office background:



Below this section, there is a checkbox that will make Outlook the default program for handling e-mail messages, contacts, and calendars.

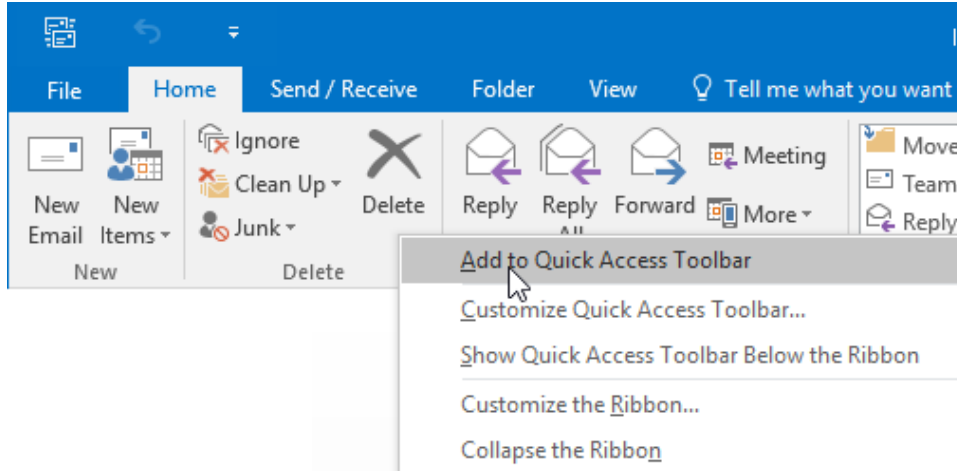
CUSTOMIZING QUICK ACCESS TOOLBAR BUTTONS

The Quick Access toolbar is provided to give you quick access to the commands you use most, so it makes sense that you can customize it. To add buttons to the Quick Access toolbar, click the drop-down arrow (▾) next to it:

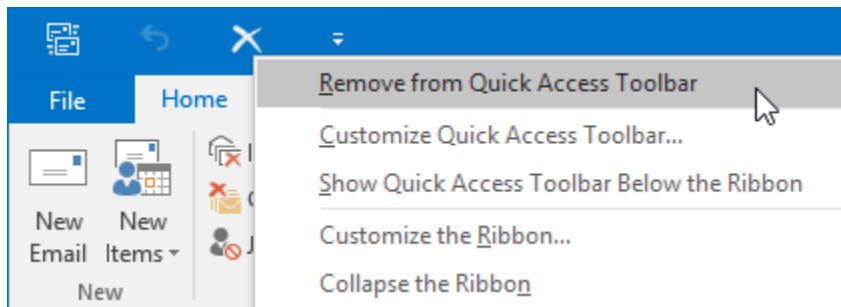


In the drop-down menu that appears, click on any commands you want to add to the toolbar. If a command has a check by it, it means it's active and on the toolbar. You can click on any of these commands to remove them from the toolbar.

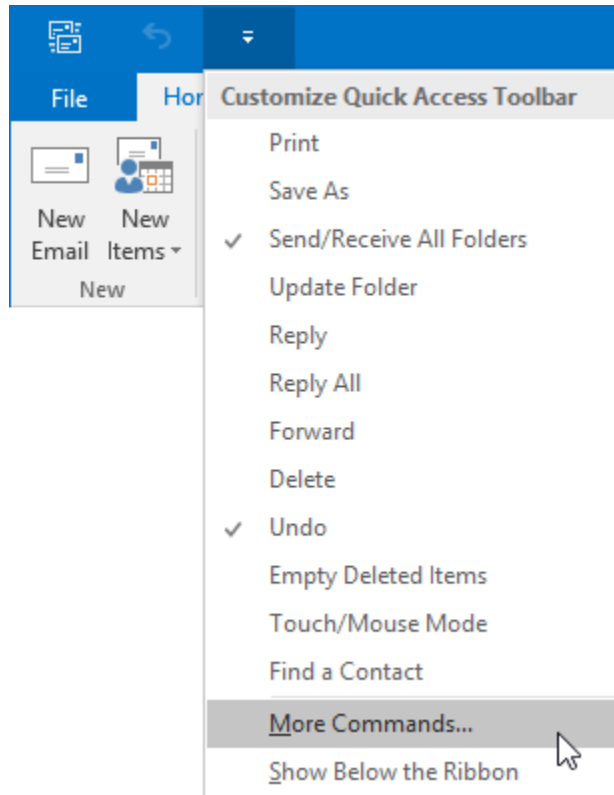
If the command that you would like to add to the Quick Access toolbar isn't listed in the drop-down arrow menu, you have a few different options available to you. First, you can right right-click almost any command on the ribbon and click "Add to Quick Access Toolbar:"



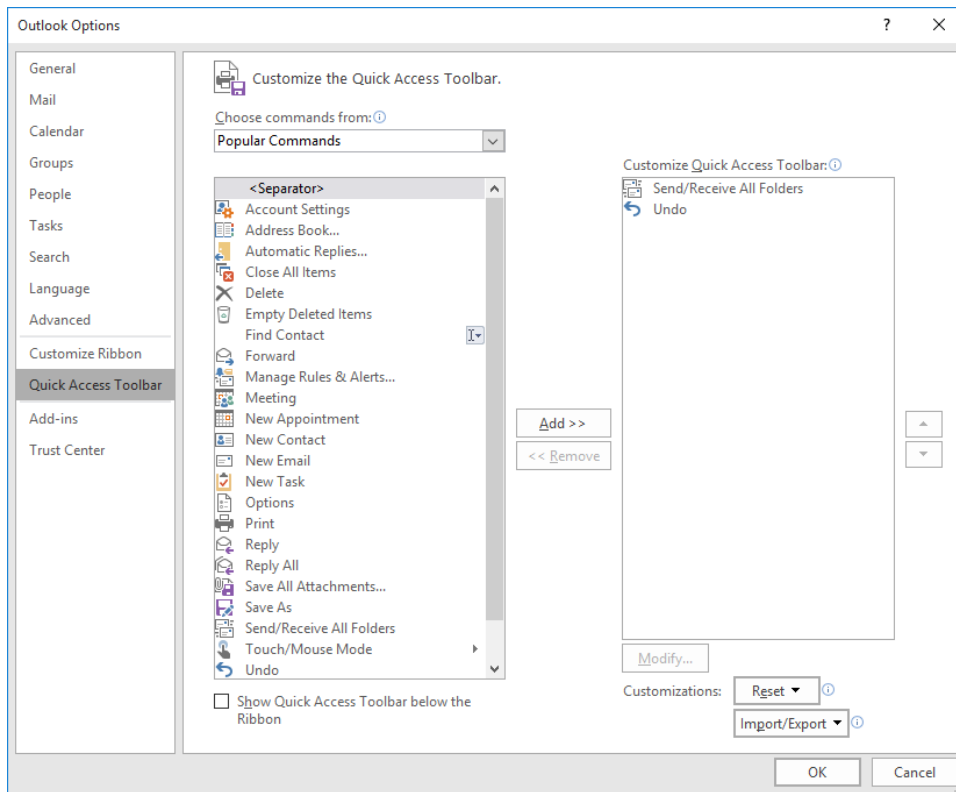
The selected command will then be immediately added to the Quick Access toolbar. From there, you can remove buttons from the Quick Access toolbar in a similar manner: right-click the command in question and then click "Remove from Quick Access Toolbar."



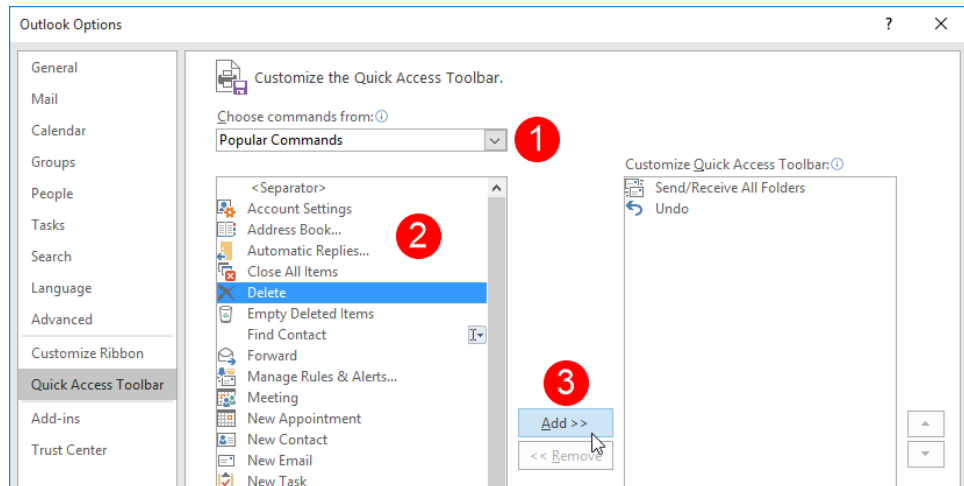
If you still cannot find the command that you would like to add to the Quick Access toolbar, click the drop-down arrow and click More Commands:



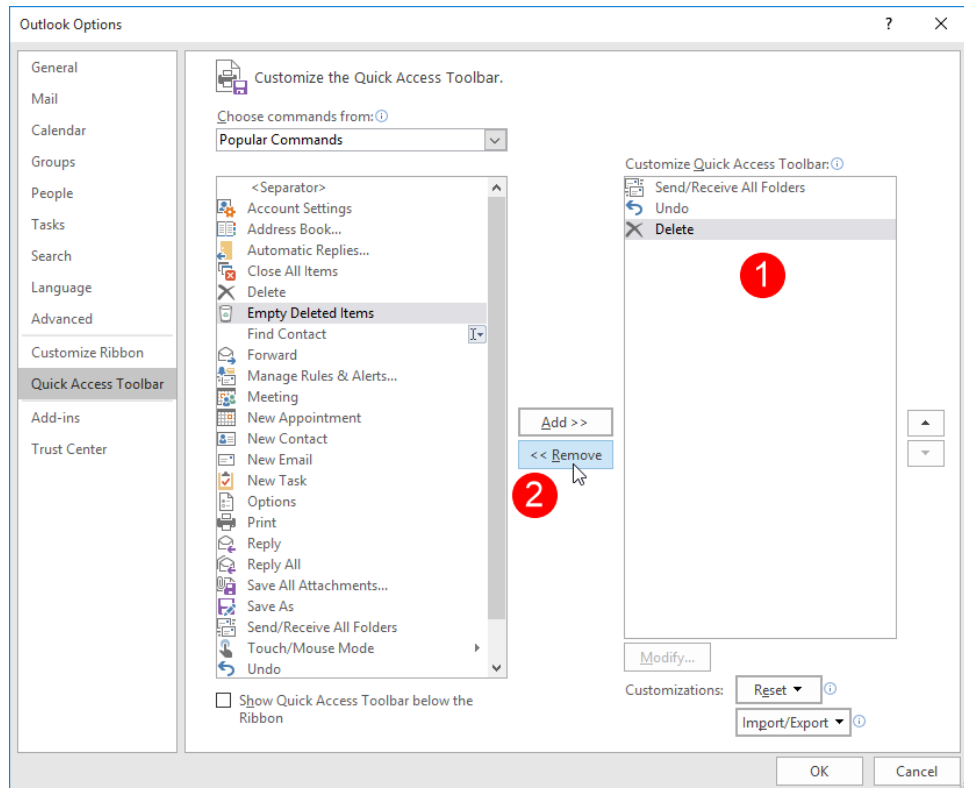
This action will display the Outlook Options dialog, open to the Quick Access Toolbar category:



Using the controls here, you are able to add commands to, and remove commands from, the Quick Access toolbar. By selecting a category from the “**Choose commands from**” drop-down menu (1) you can find exactly the **command** that you would like to add from the list (2). Once you have found the command in question, click to select it and then click the **Add button (3)**:



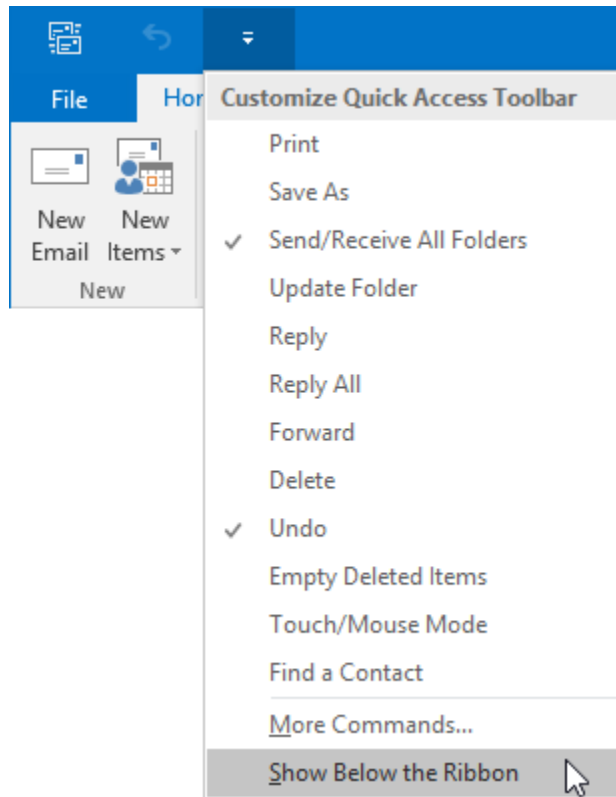
To remove a button, click to select it from the **list on the right (1)** and then click the **Remove button (2)**:



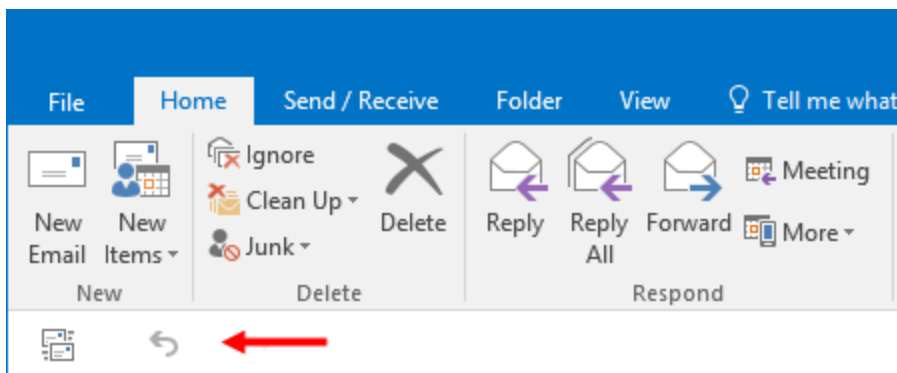
The changes will automatically be applied. Click OK to close the dialog box.

MOVING THE QUICK ACCESS TOOLBAR

If you prefer, you can move the Quick Access toolbar so that it appears below the ribbon rather than above it. To do this, click the Customize Quick Access Toolbar arrow and click “Show Below the Ribbon:”



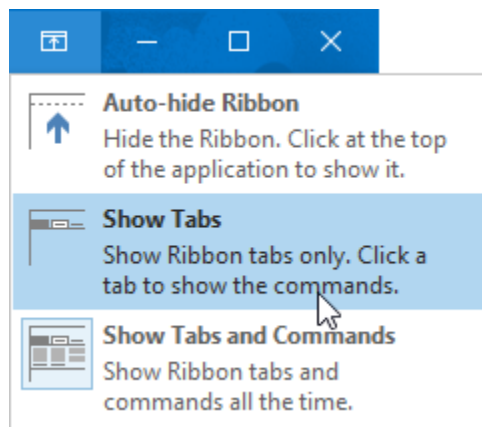
Here's what the Quick Access toolbar will look like if it is moved below the ribbon:



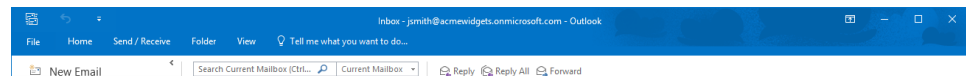
You can move the Quick Access toolbar back to above the ribbon by clicking the Customize Quick Access Toolbar arrow and then clicking “Show Above the Ribbon.”

MINIMIZING THE RIBBON INTERFACE

While the ribbon interface can be very useful, it can take up a lot of screen real estate. If you find yourself wanting more room to work with Outlook 2016, you can minimize the ribbon interface. To do this, click the Ribbon Display Options button near the upper right-hand corner of the Outlook window and then click Show Tabs:

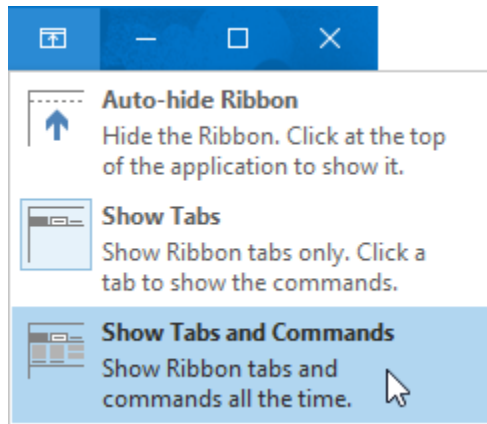


Once the ribbon interface has been minimized, you will only see the tab names:

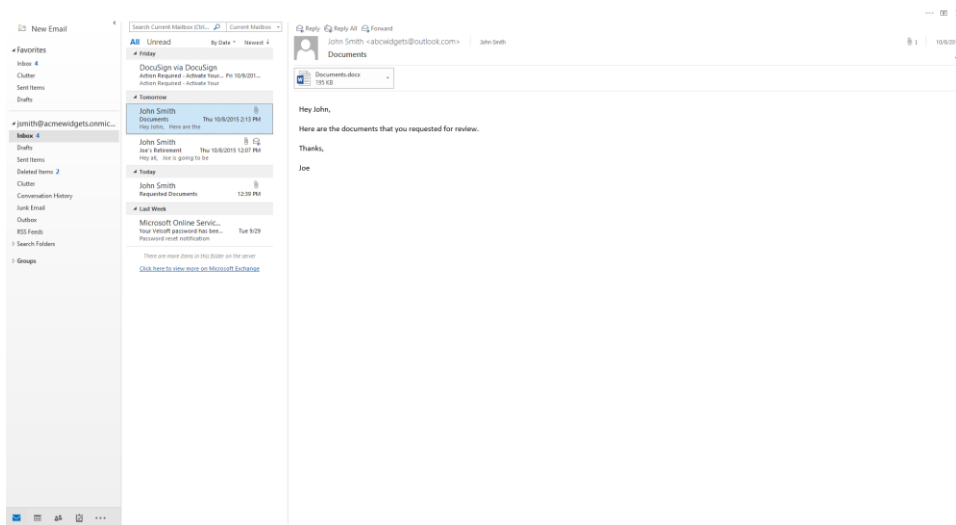


Clicking on any of these tabs will automatically expand the ribbon, while clicking a command or clicking elsewhere in the Outlook 2016 interface will minimize it again.

To return the ribbon back to its default expanded state, click the Ribbon Display Options button near the upper right-hand corner of the Outlook window and then click “Show Tabs and Commands:”

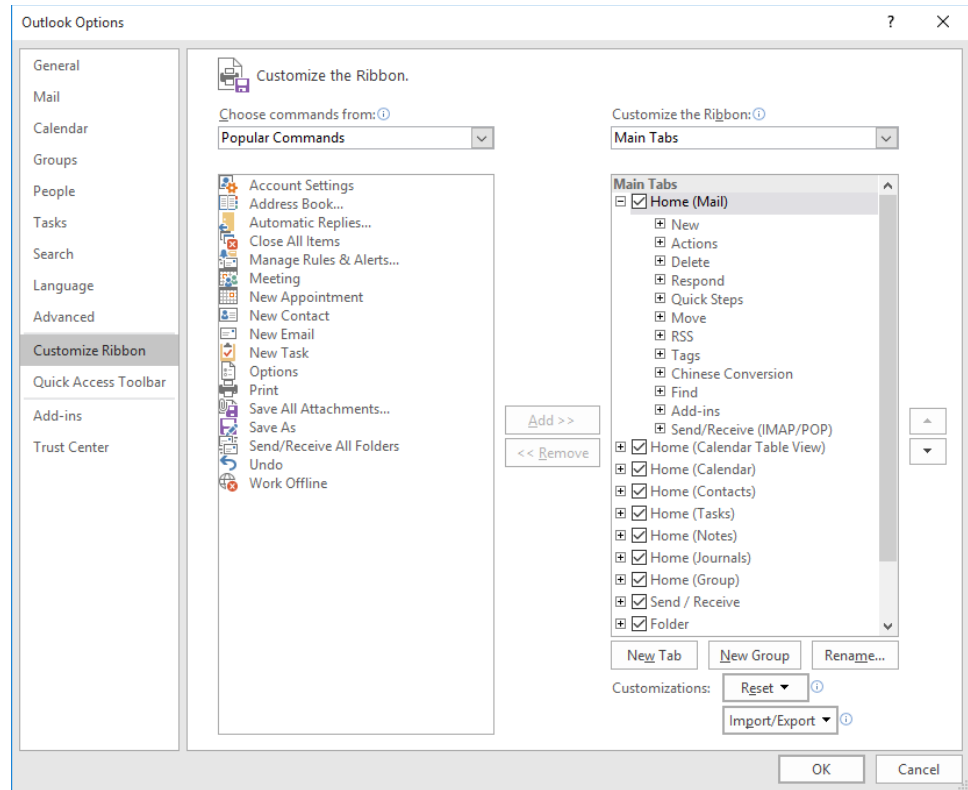


The “Auto-hide Ribbon” option on this menu will display the Outlook 2016 window full screen and hide the entire ribbon unless you move your cursor over that area:



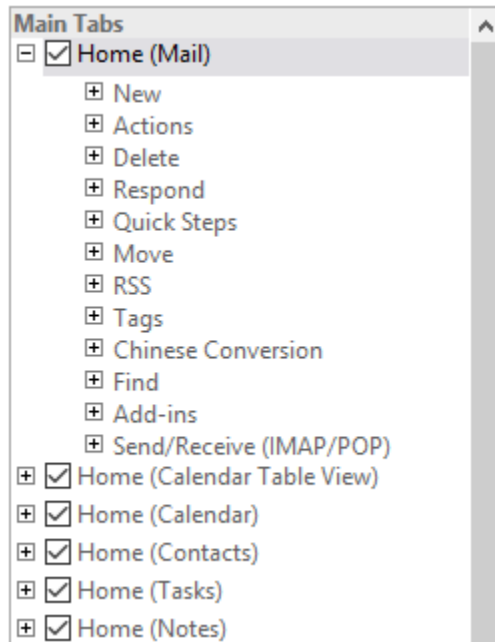
CUSTOMIZING THE RIBBON

You also have the option to customize the ribbon and what controls appear on it. To get started, click File → Options, and then click the Customize Ribbon category in the Outlook Options dialog box. This view should look familiar to you, since customization of the Quick Access toolbar is very similar:



Adding or Removing Tabs

The list on the right-hand side of the Customize Ribbon category shows all the main tabs in Outlook 2016:

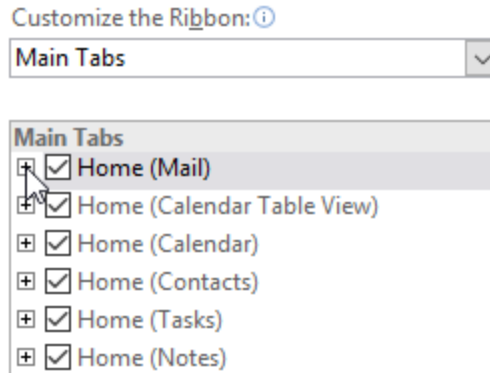


All tabs that include a checkmark are either visible or will be visible under the right conditions. For example, there is a Home tab for each Outlook workspace. The tab that is visible depends on the type of workspace that you are in.

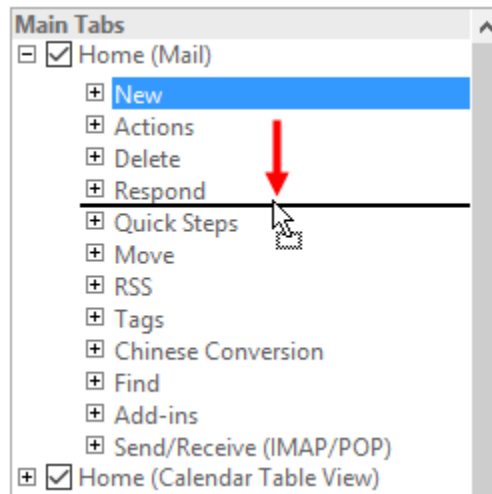
In order to add or remove a tab, check or uncheck the checkbox adjacent to the tab name. If you like, you can even have no tabs at all.

Arranging Tabs and Groups

You can rearrange the order of tabs, groups, and individual commands. First, expand a tab or group by clicking the + sign adjacent to it:

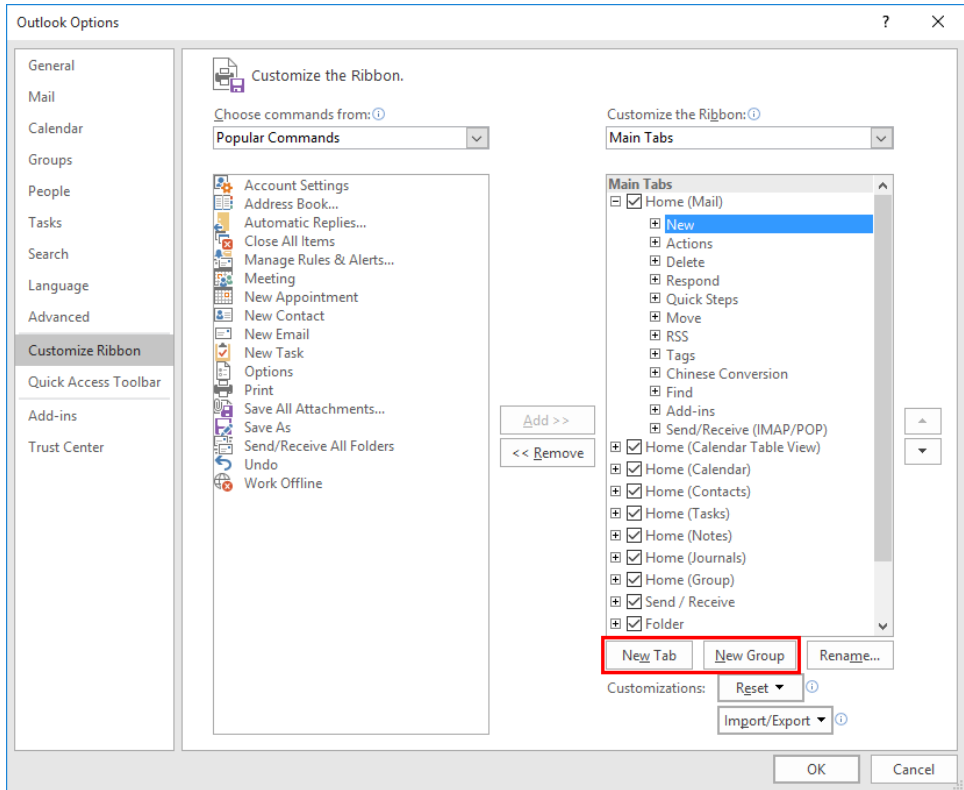


This will expand the contents of that particular tab or group. To rearrange items within either object type, select an item and then click the up or down arrows to the right of the list box. Or, click and drag to change the order:

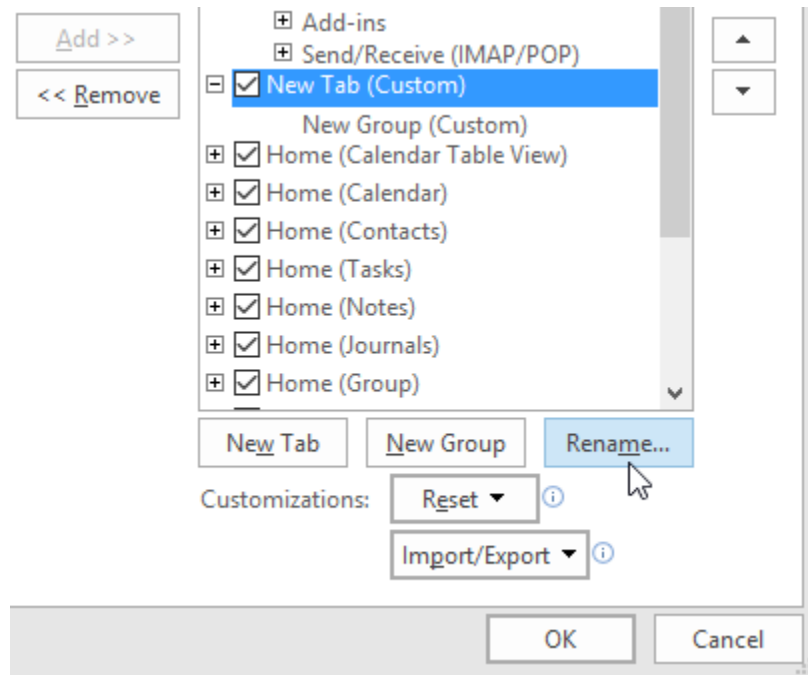


Creating New Tabs and Groups

You can create your own tabs and groups using the commands near the bottom right-hand corner of the Outlook Options dialog:



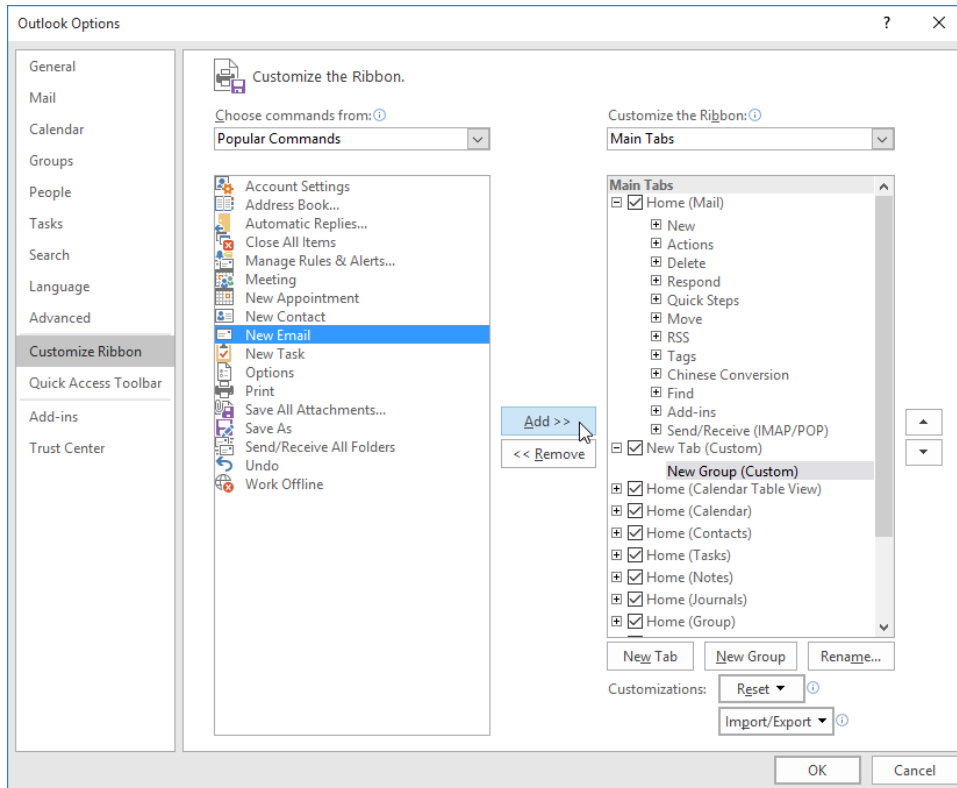
Click New Tab to create a tab and then fill it with as many groups as you would like. You can also select a new tab or group and use the Rename button to give the new item a meaningful name:



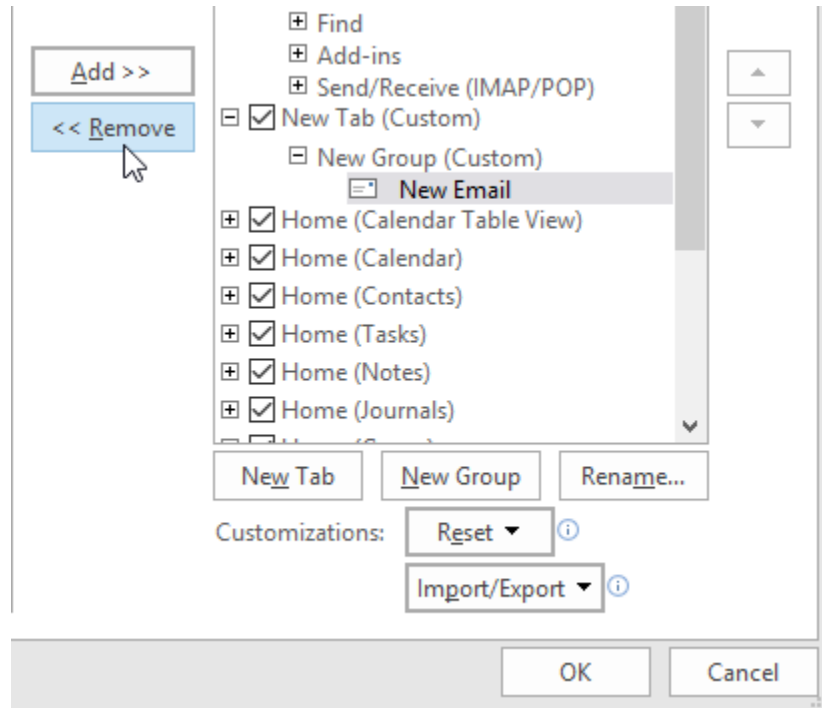
Note that if you select a custom tab and click the Remove button, that tab will be removed completely.

Customizing Group Commands

You can customize any groups that you have added, either to custom tabs or to the default tabs. To add a command to a custom group, expand the group that you want to fill with commands, select a command from the list on the left of the dialog box, and then click Add:

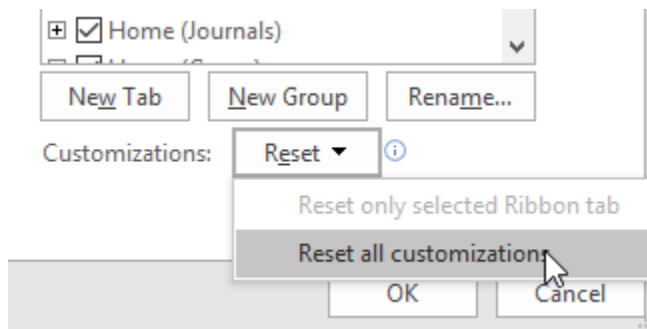


To remove a command, select it in the list on the right and click the Remove button:

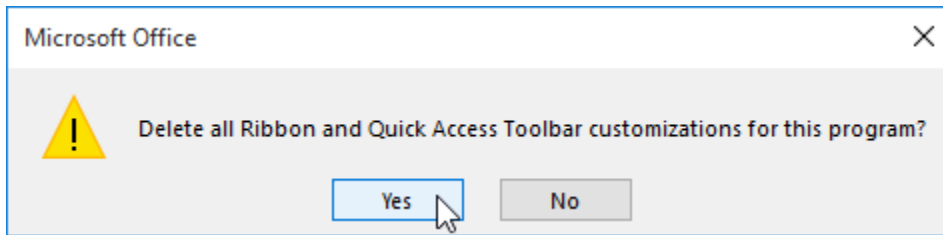


RESETTING CUSTOMIZATIONS

To reset all the interface changes that you have made, open the Outlook Options dialog to the Customize Ribbon category. Then, click Reset → Reset all customizations:



Click Yes when you are prompted to confirm the operation:

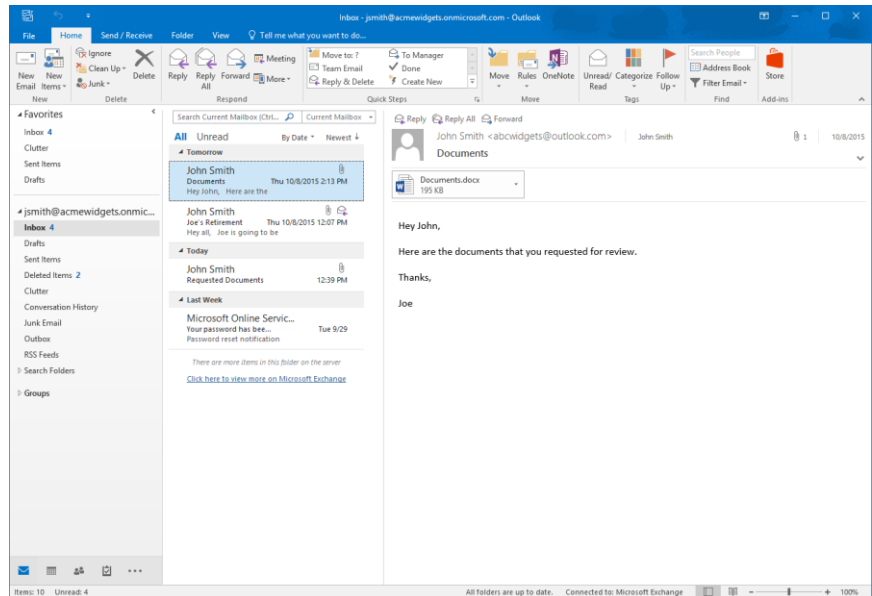


ACTIVITY 8-1

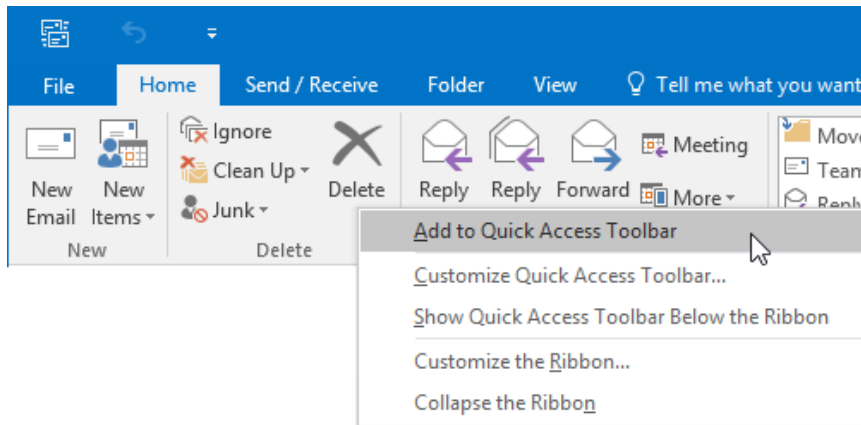
Customizing the Outlook Interface

As you have been incorporating Outlook 2016 more and more into your workflow, you would like to better customize it suit your needs.

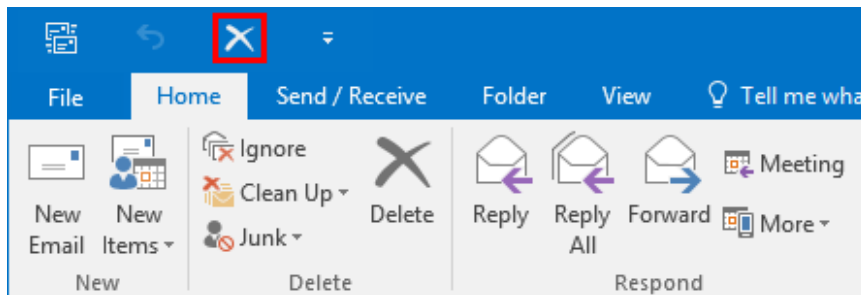
1. To begin, open Outlook 2016 to your Inbox:



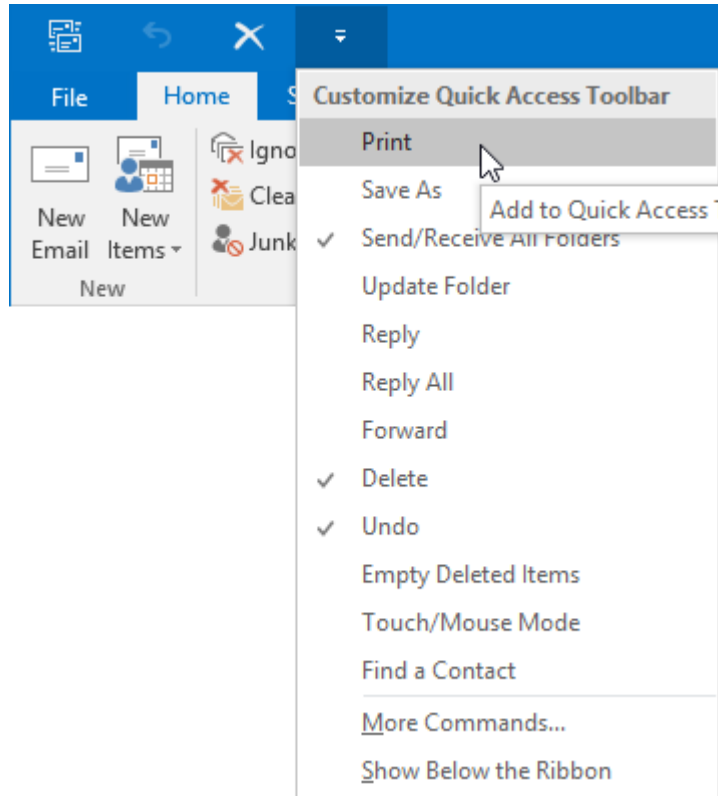
2. First, you would like to add the Delete command to the Quick Access toolbar so that you can access it more quickly. Right-click the Delete command on the Home tab and click “Add to Quick Access Toolbar:”



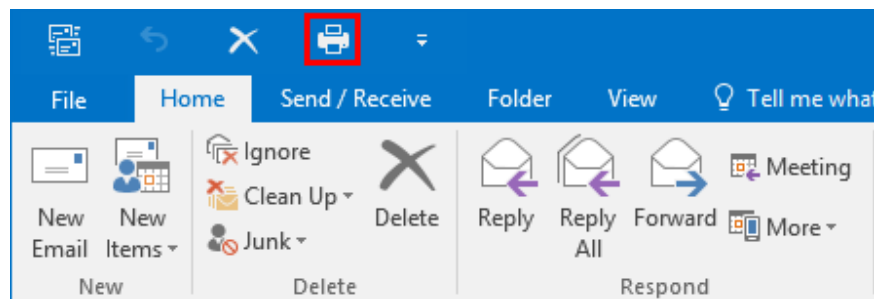
3. Examine the Quick Access toolbar. You will now see the Delete command:



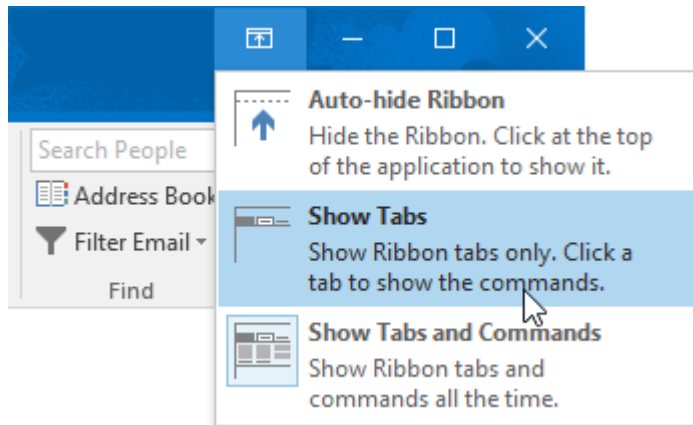
- Now you would like to add the Print command to the Quick Access toolbar. Click the drop-down arrow (▾) next to the Quick Access toolbar and click Print:



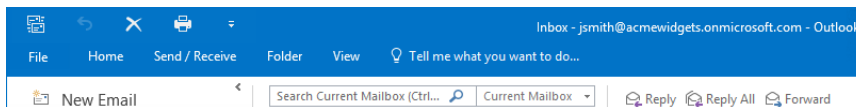
- Examine the Quick Access toolbar. You will now see that the Print command has been added to it:



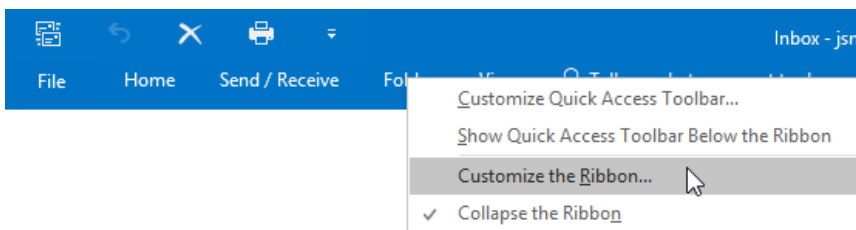
6. To save space in the Outlook 2016 window, you would like to minimize the ribbon. Click the Ribbon Display Options button near the upper right-hand corner of the Outlook window and then click Show Tabs:



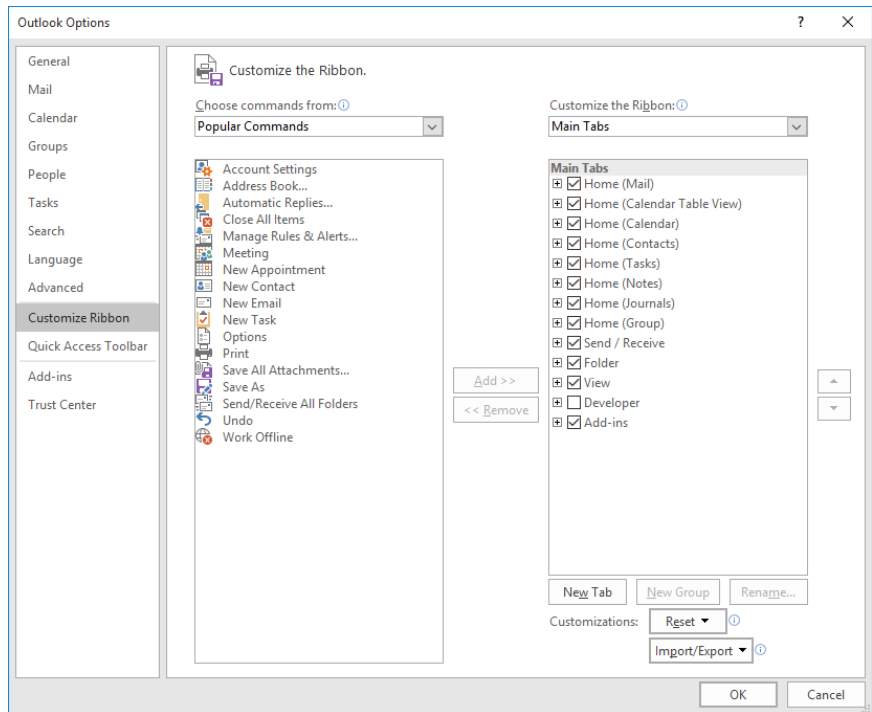
7. The ribbon will now be minimized with only the tab names displayed:



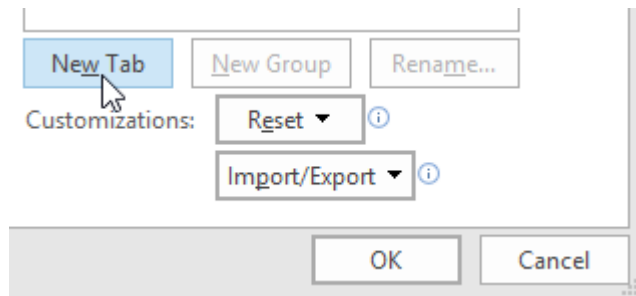
8. Now you need to create a new tab. Right-click any ribbon tab and click "Customize the Ribbon:"



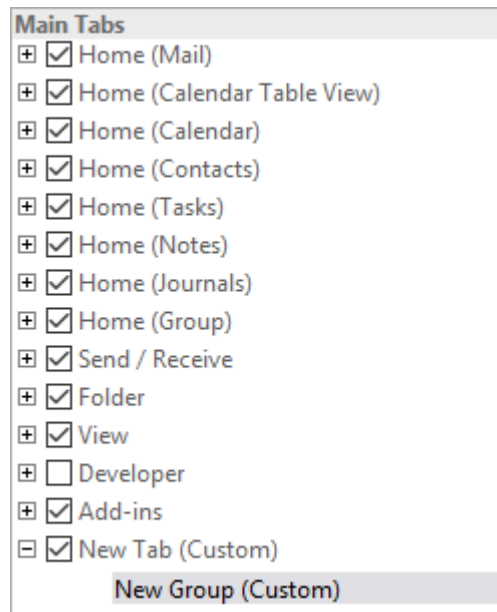
9. The Outlook Options dialog box will now be displayed with the Customize Ribbon category selected:



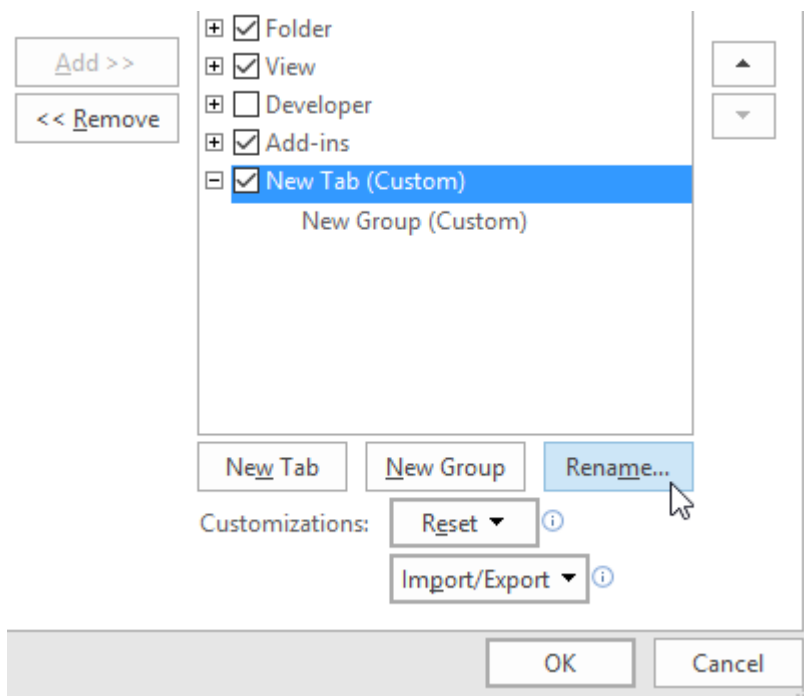
10. Near the lower right-hand corner of the Outlook Options dialog box, click the New Tab button:



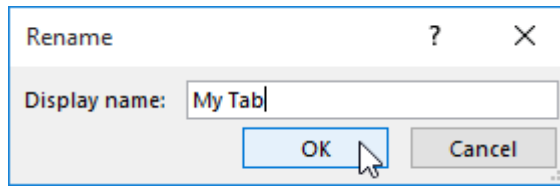
11. You will now see two new entries [“New Tab (Custom)” and “New Group (Custom)”] after the Add-Ins tab in the tabs list:



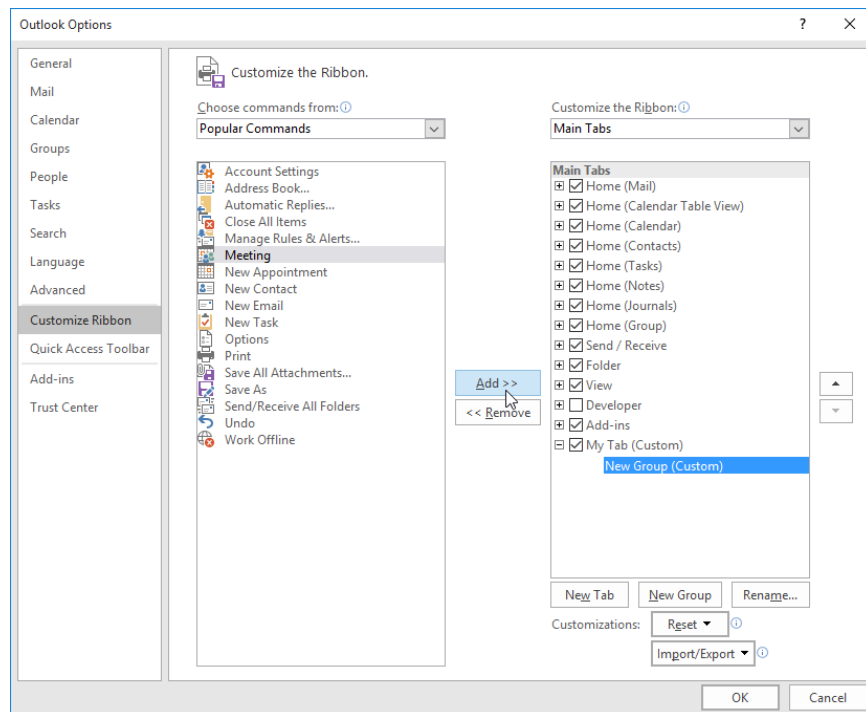
12. Select “New Tab (Custom)” and then click the Rename button:



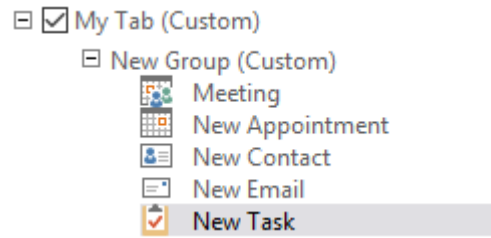
13. In the Rename dialog box, type “My Tab” and then click OK:



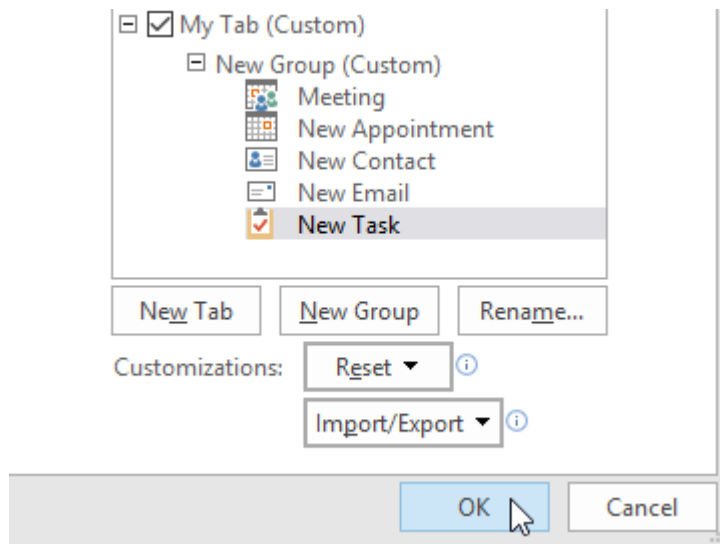
14. Click to select the “New Group (Custom)” group within My Tab (which you just created). Click to select the Meeting command from the “Choose commands from” list. Click Add:



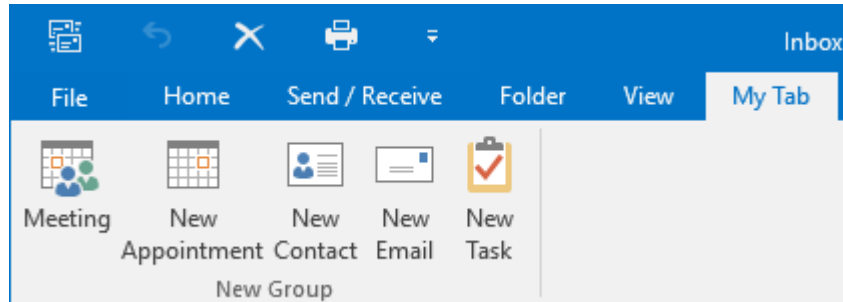
15. Repeat Step 14 to add the New Appointment, New Contact, New E-mail, and New Task commands to the new tab:



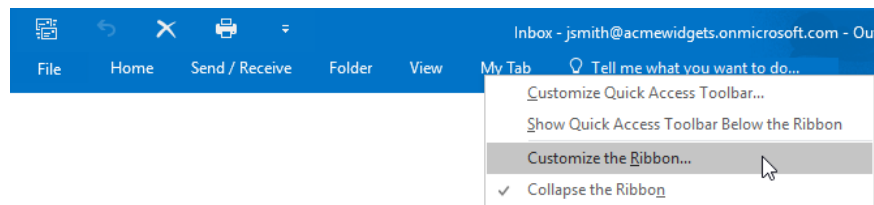
16. Click OK to apply the new changes and close the Outlook Options dialog box:



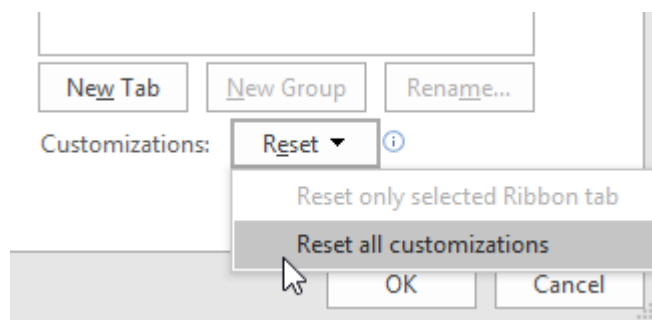
17. Back at the Outlook 2016 window, you will see your new tab on the ribbon. Click it to expand it and view the commands that you added to it:



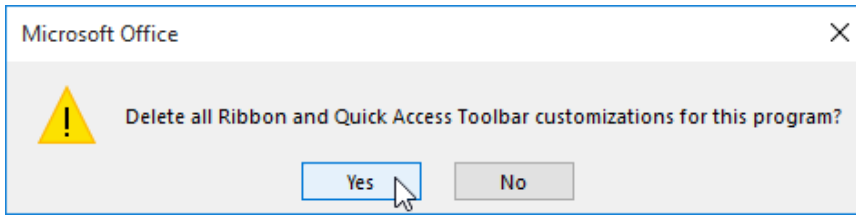
18. To reset the Outlook 2016 interface back to its default state, right-click on any tab and click “Customize the Ribbon:”



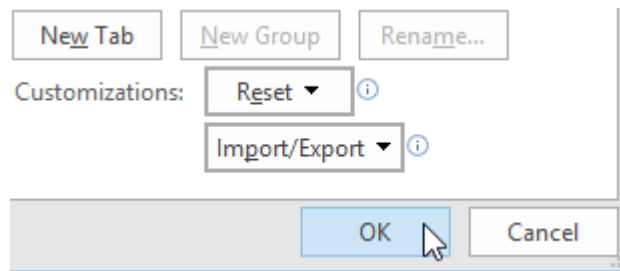
19. Next, near the lower right-hand corner of the Outlook Options dialog box, click Reset → Reset all customizations:



20. A dialog box will be displayed to confirm this operation. Click Yes to continue:



21. In the Outlook Options dialog box, click the OK button:



22. Close Microsoft Outlook 2016.

TOPIC B: Create and Manage Quick Steps

Quick Steps are used to help you complete common actions in a more timely and efficient manner. While there are a number of preconfigured Quick Steps to choose from, you also have the option to create your own. Over the course of this topic, you will learn all about Quick Steps and how to create them.

Topic Objectives

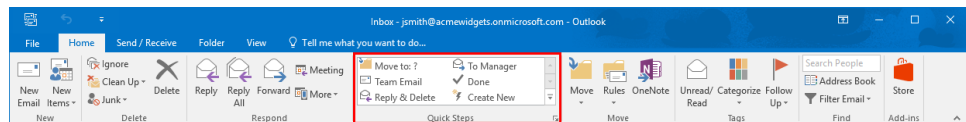
In this topic, you will learn:

- About Quick Steps
- How to use, create, and reset Quick Steps
- About the Manage Quick Steps dialog box

QUICK STEPS

Quick Steps are used to complete actions that typically require several steps with just one click. Similar to a macro, a Quick Step is essentially a shortcut to complete a procedure or action.

By default, Outlook 2016 includes several preconfigured Quick Steps, all of which are found in the Quick Steps group of the Home tab (while in the Mail workspace):



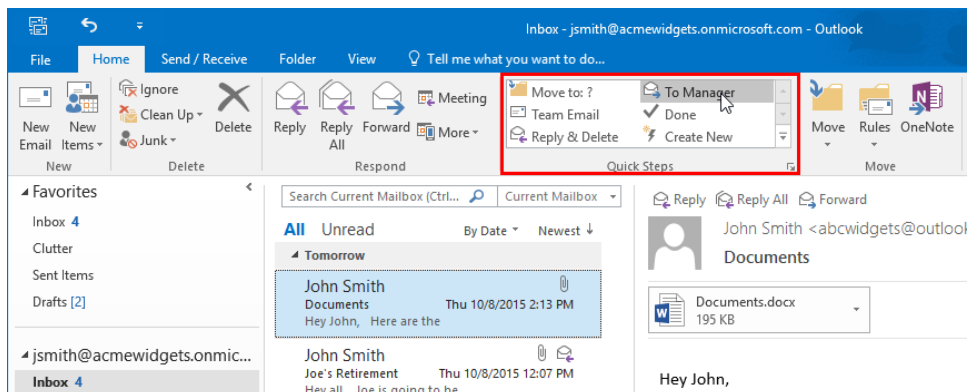
Clicking on any of these quick steps will execute them.

Below is a breakdown of what each Quick Step will do:

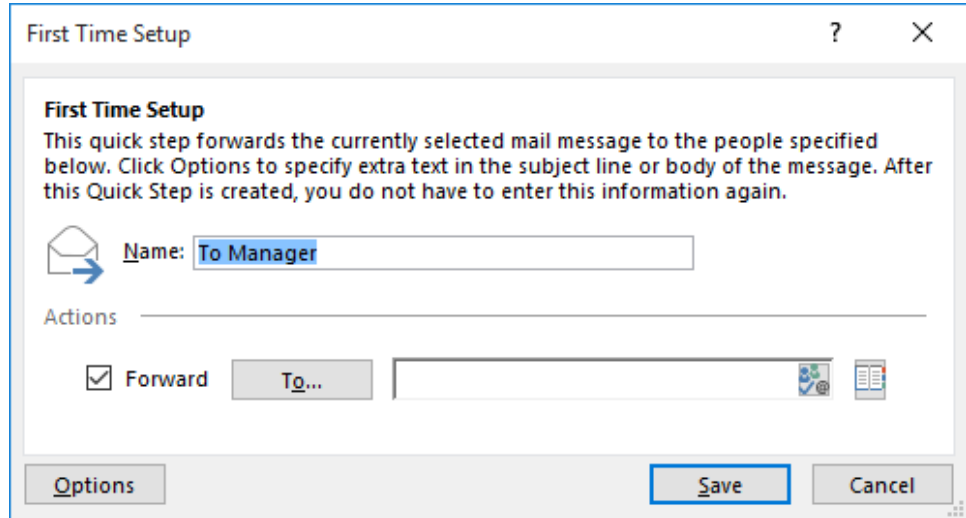
- **Move To?:** This Quick Step will mark the currently selected e-mail message as read and move it to a designated folder. If you are using this Quick Step for the first time, you will be prompted to set the designated folder.
- **To Manager:** Clicking this Quick Step will forward the currently selected e-mail message to your manager. The first time that you use this Quick Step, you will be prompted to enter the e-mail address that you would like to use.
- **Team E-mail:** This Quick Step will forward the currently selected e-mail message to all the members of your team. If you are using this Quick Step for the first time, you will be required to add those e-mail addresses.
- **Done:** Clicking this Quick Step will mark the currently selected e-mail message as read (or complete) and move it to a specified folder. If you are using this Quick Step for the first time, you will be prompted to set the designated folder.
- **Reply & Delete:** This Quick Step is used to reply to a selected e-mail message and delete the original message.
- **Create New:** This option will display the Edit Quick Step dialog box. Here, you are able to create a new Quick Step from scratch.

USING QUICK STEPS

To use a Quick Step, first select the item that you would like to work with. Then, click the Quick Step that you would like to use from the gallery on the Home tab. For example, here the To Manager Quick Step has been selected:

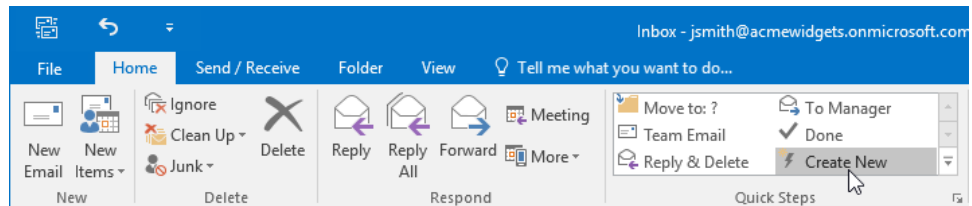


If you are using a Quick Step for the first time, you may need to configure it. In such cases, the First Time Setup dialog box will be displayed. This dialog will appear differently depending on the Quick Step that you select, and will walk you through the setup process:

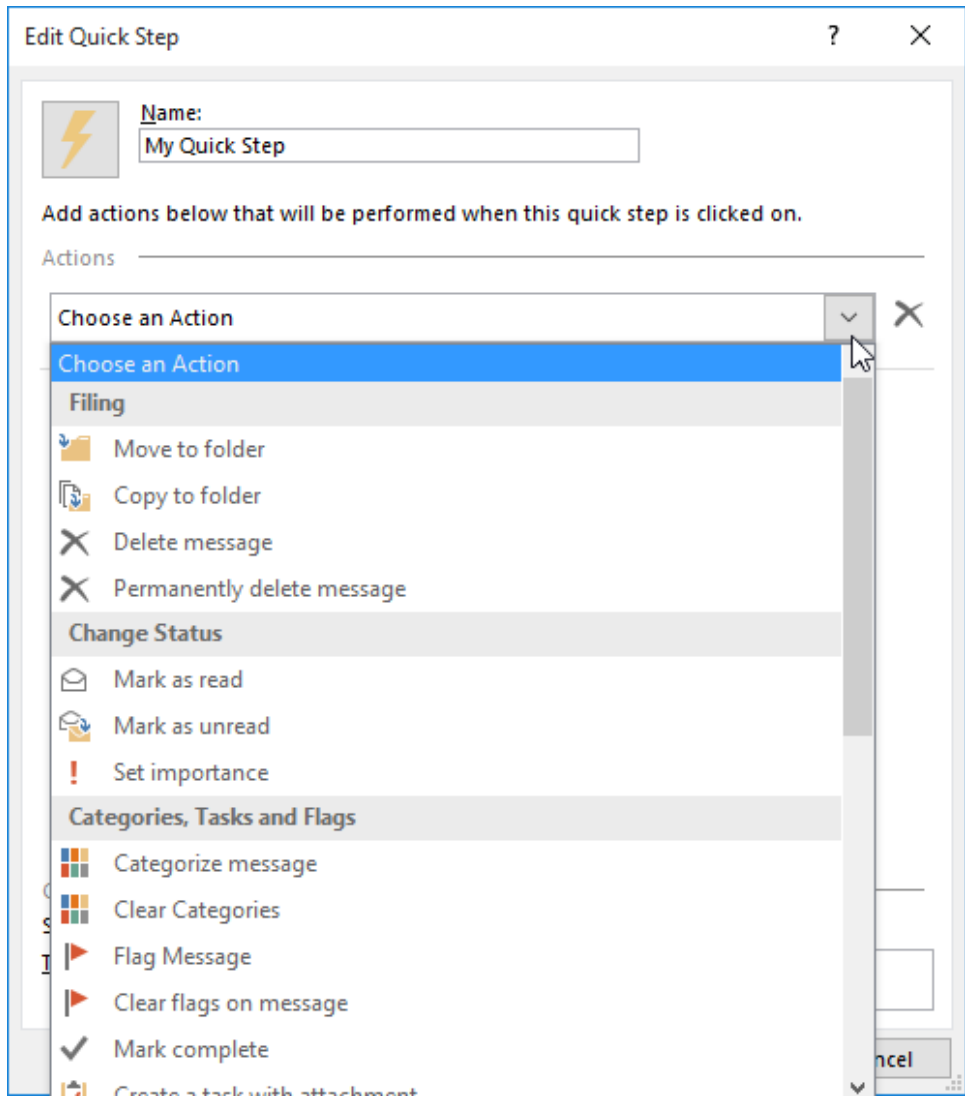


CREATING QUICK STEPS

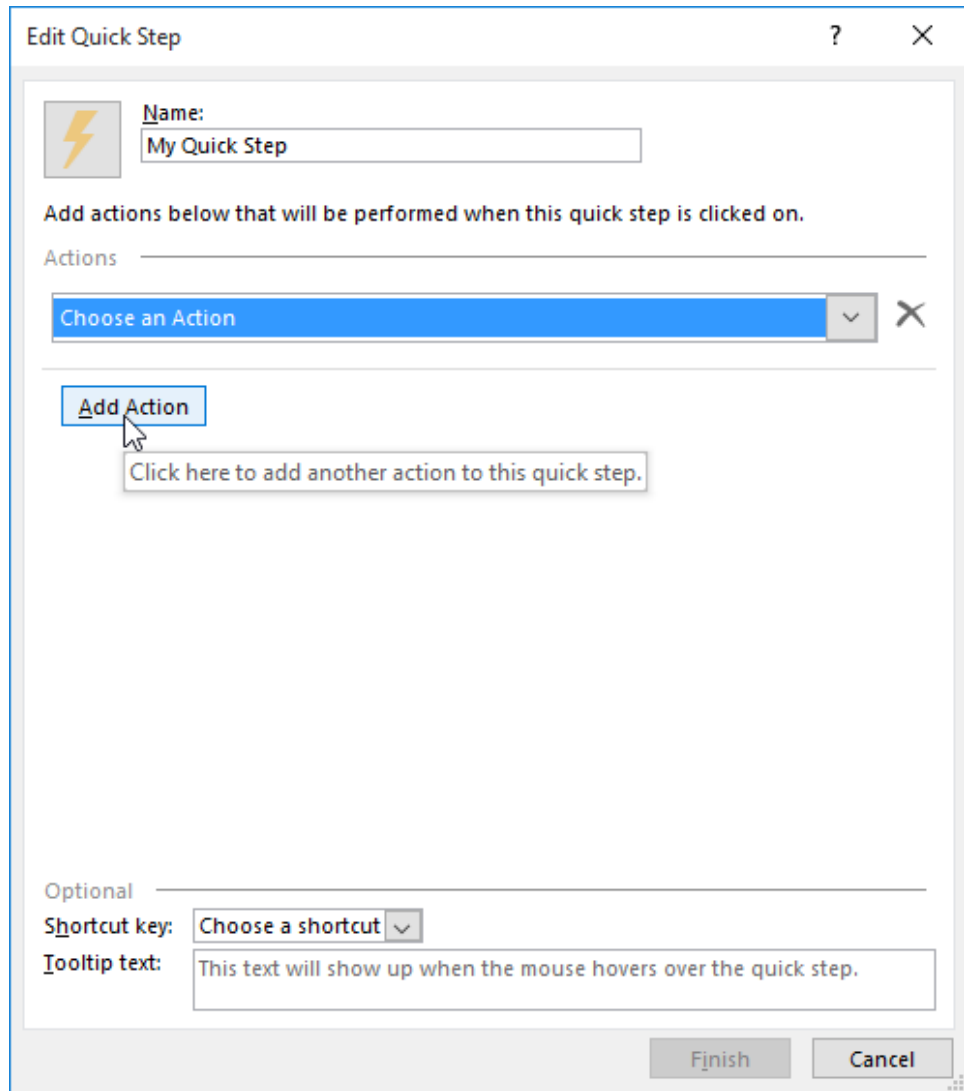
To create your own Quick Step, click the Create New command inside the Quick Steps gallery on the Home tab:



This action will display the Edit Quick Step dialog box. Here, you can give the new Quick Step a name and add the actions that you would like it to perform:

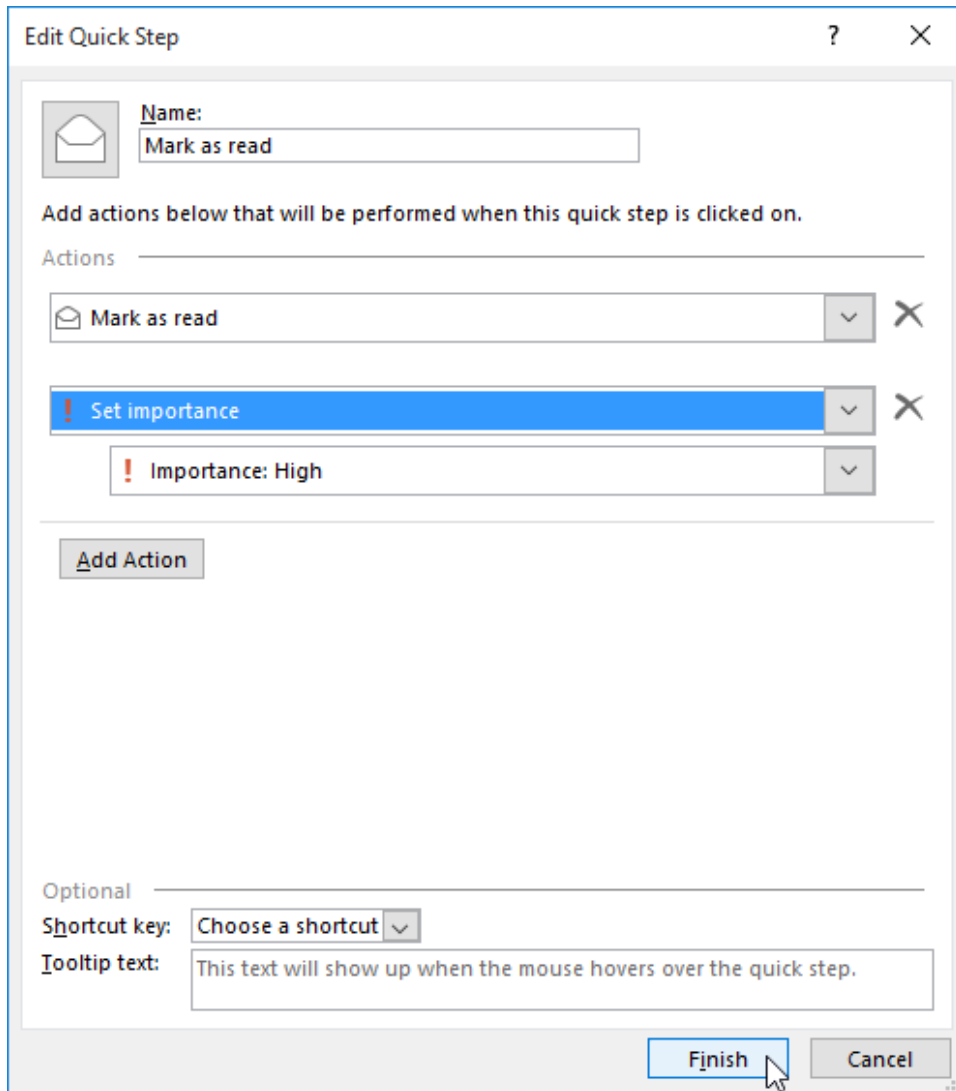


To add more than one action, click the Add Action button below the “Choose an Action” drop-down menu:

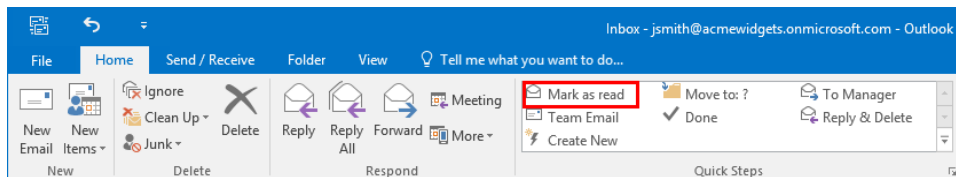


An additional menu will be displayed where you can choose the next action that you want the Quick Step to perform. You can repeat this procedure to create up to ten actions for the Quick Step!

When you are done configuring the new Quick Step, click Finish:

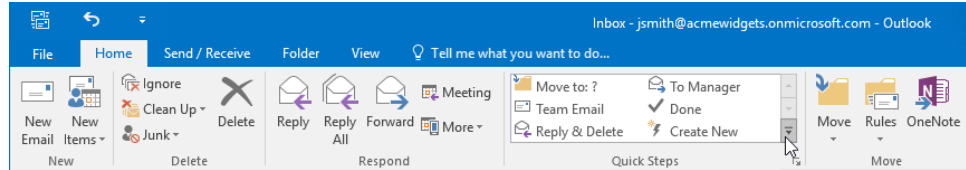


Returning to the Outlook 2016 window, you will see the Quick Step that you just created inside the Quick Steps gallery on the Home tab:

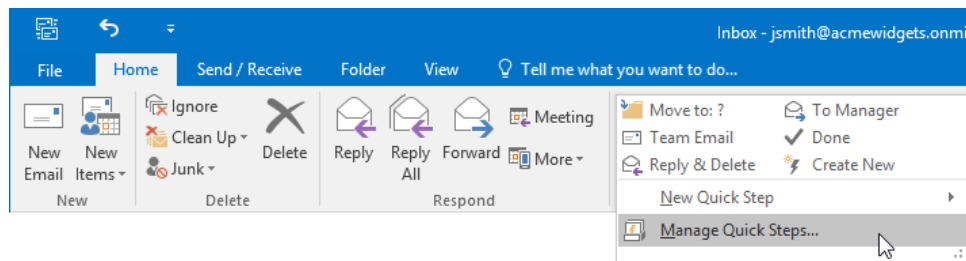


THE MANAGE QUICK STEPS DIALOG BOX

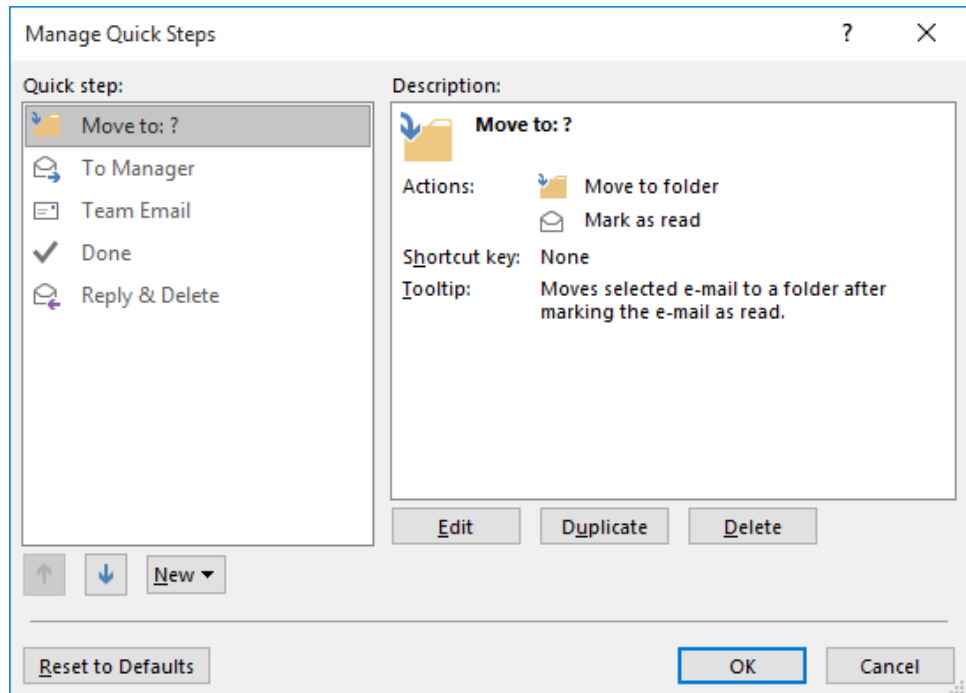
To manage the available Quick Steps, click the More arrow (⌵) in the lower right-hand corner of the Quick Steps gallery on the Home tab:



Click the Manage Quick Steps option from the expanded gallery:



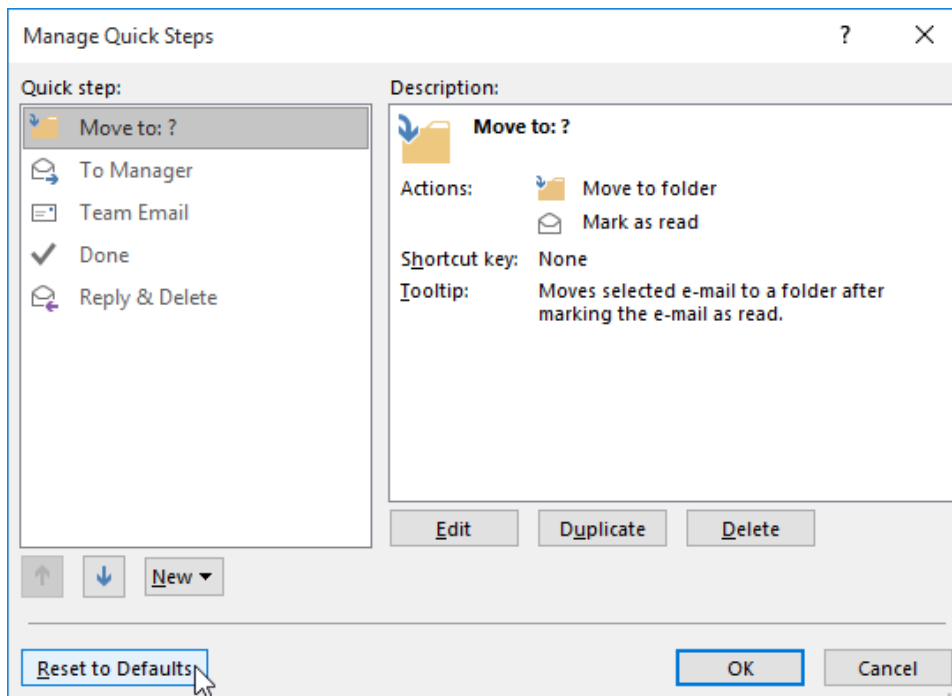
The Manage Quick Steps dialog box will open. On the left-hand side, you will see a list of existing Quick Steps. Clicking on any Quick Step item will display its details in the right-hand side of the dialog box:



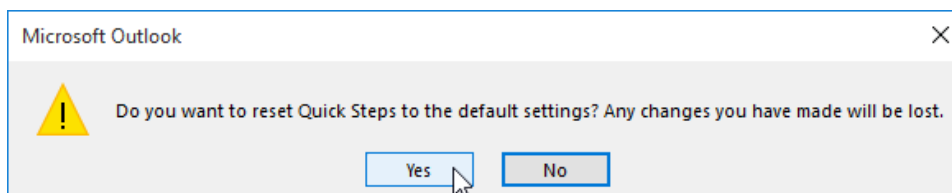
Below the description, you will find commands to edit, duplicate, or delete the Quick Step. You can also use the commands at the bottom of the Quick Step list to reorder the steps (which affects what steps you see in the gallery) or to create a new Quick Step. Click OK when you are finished making your changes.

RESETTING QUICK STEPS

To reset Quick Steps, open the Manage Quick Steps dialog and click “Reset to Defaults:”



This action will cause the following warning to be displayed. Click Yes to continue:



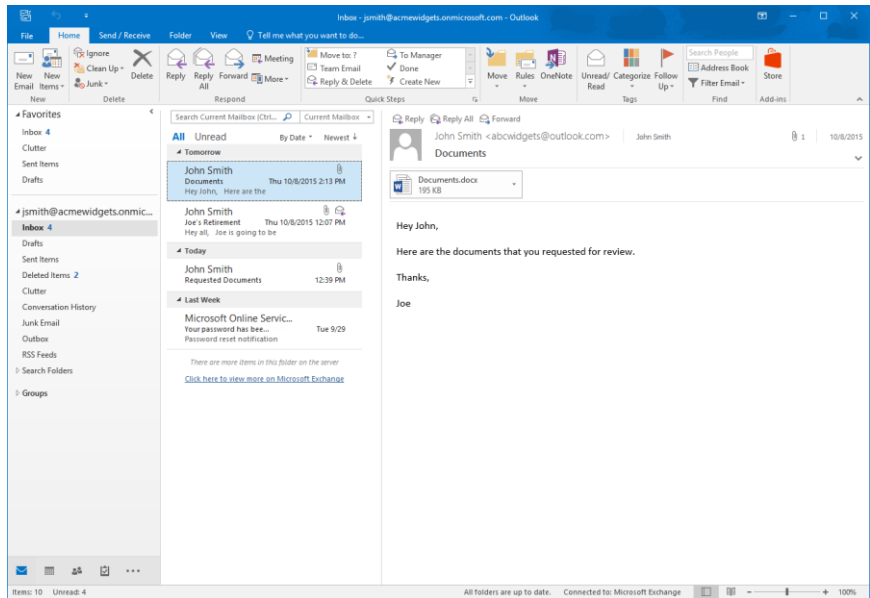
Any customized Quick Steps will be deleted, and any changes to default Quick Steps will be reversed.

ACTIVITY 8-2

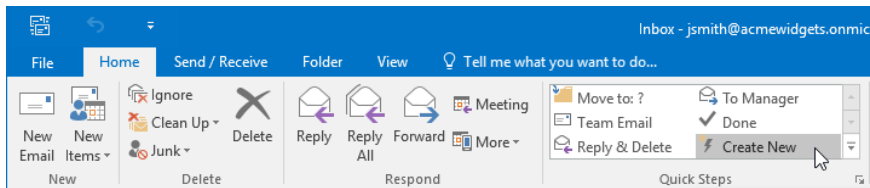
Creating and Managing Quick Steps

You would like to create a Quick Step that will mark a message as read and give it a lower importance level.

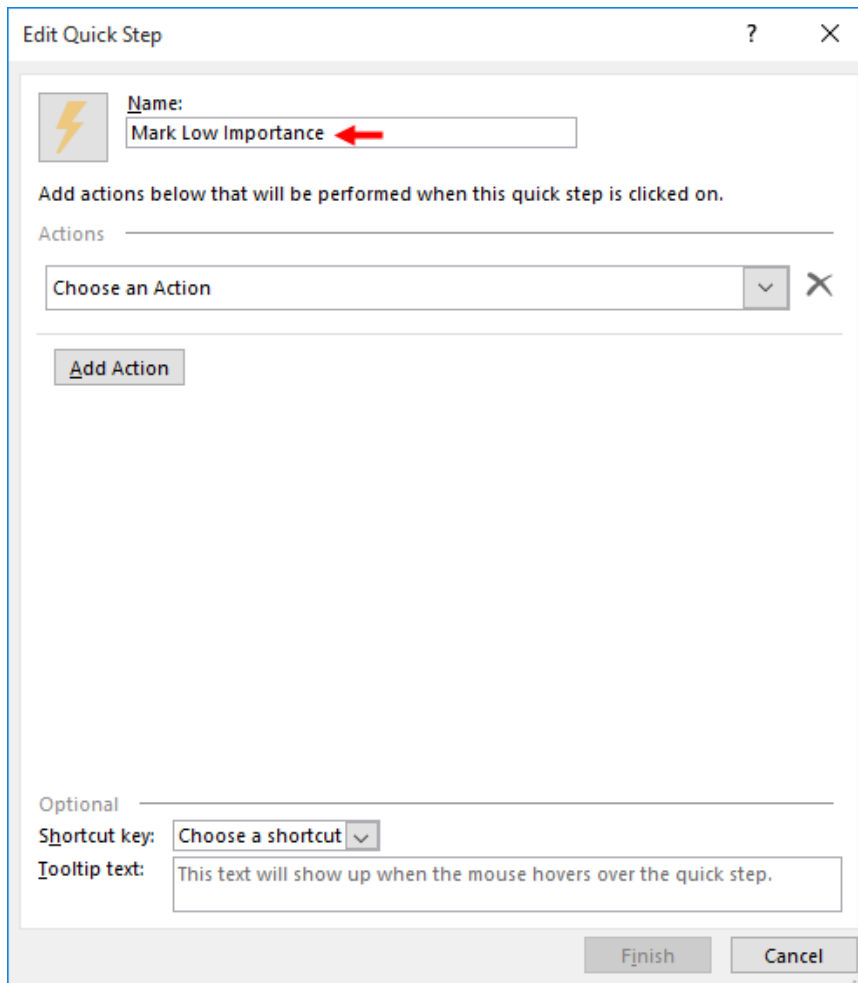
1. To begin, open Microsoft Outlook 2016:



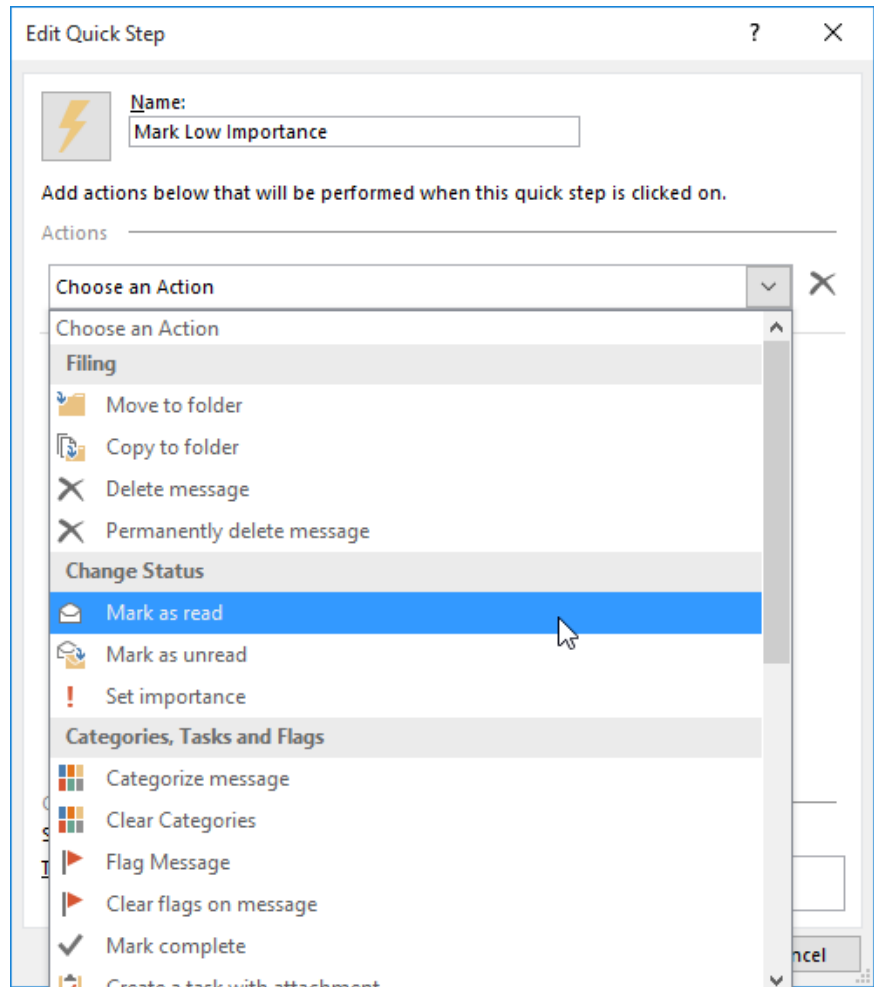
2. Start creating a new Quick Step by clicking the Create New option in the Quick Steps gallery on the Home tab:



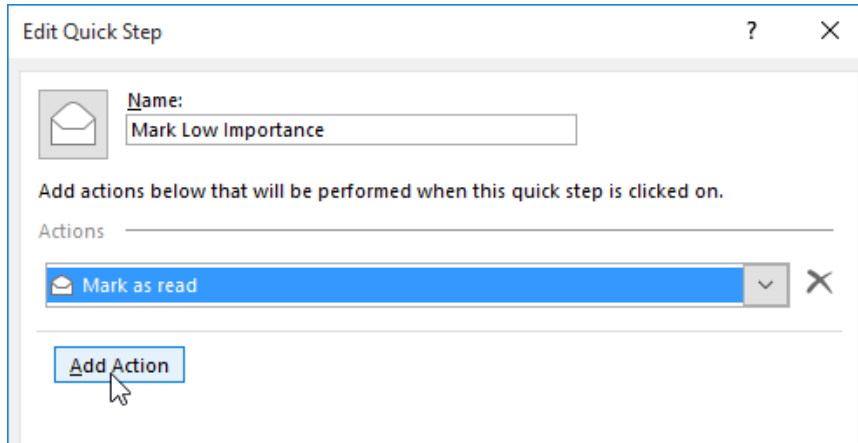
3. The Edit Quick Step dialog box will now be displayed. Inside the Name text box, type “Mark Low Importance:”



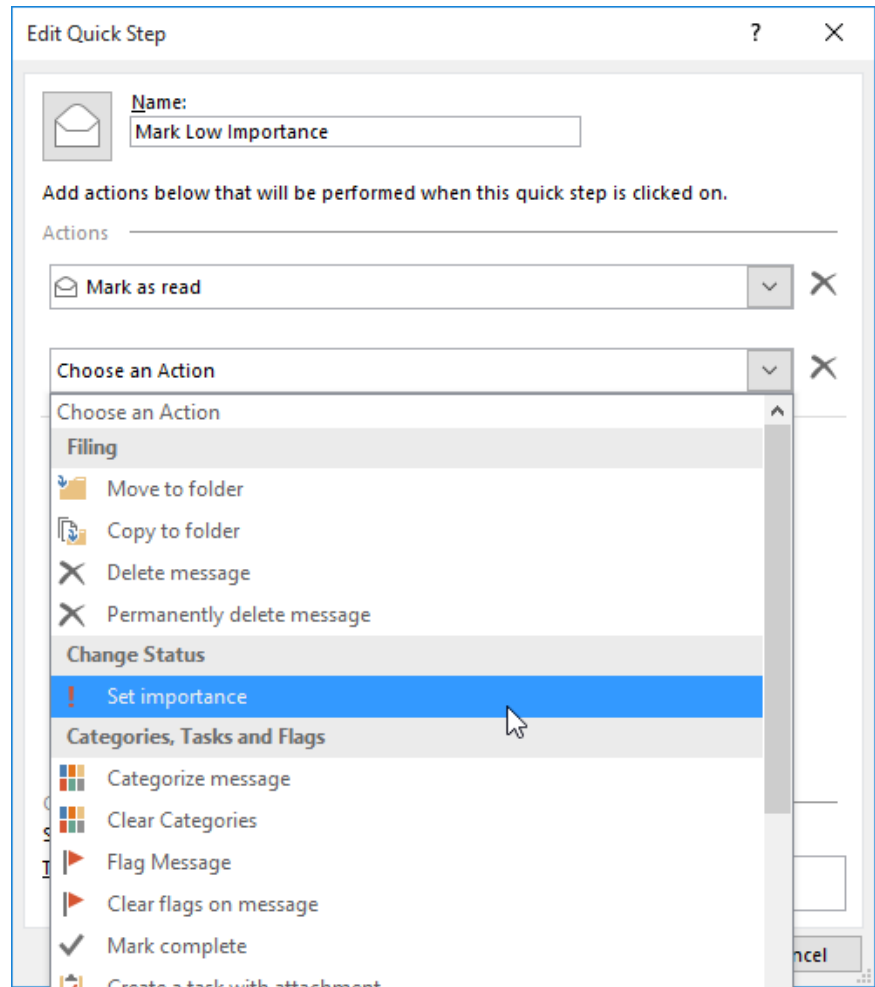
4. Next, you need to add an action to this Quick Step. Click the “Choose an Action” drop-down menu and then click “Mark as read:”



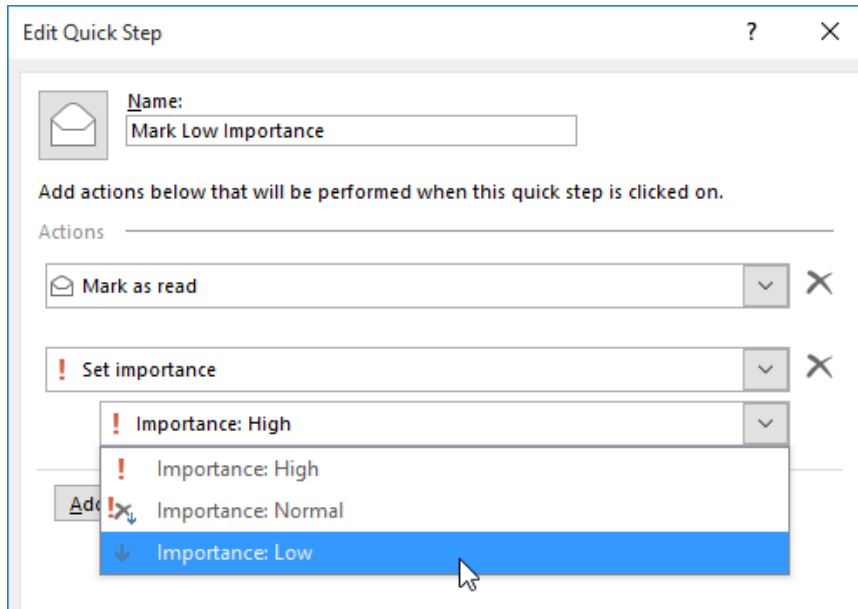
5. Click the Add Action button:



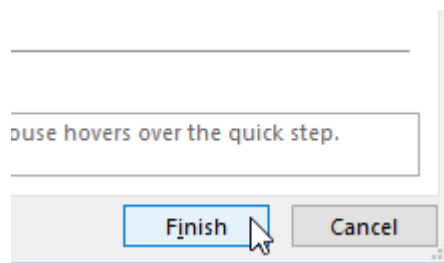
6. Click the new “Choose an Action” drop-down menu that appears and choose “Set importance:”



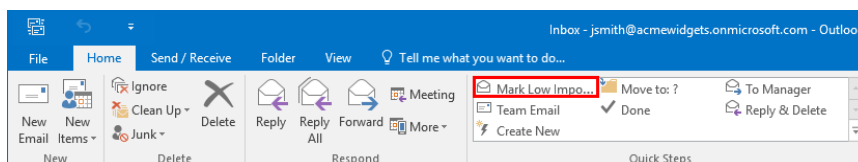
- The “Set importance” action requires more specific criteria to be added. Click the drop-down menu that appears below it and then click “Importance: Low.”



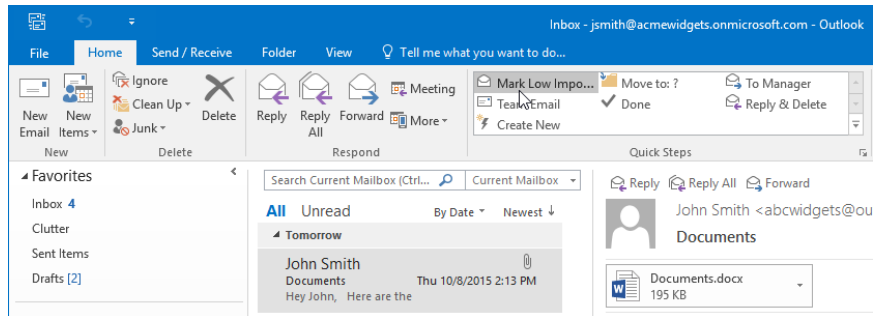
- With the new Quick Step now configured, click the Finish button to create it:



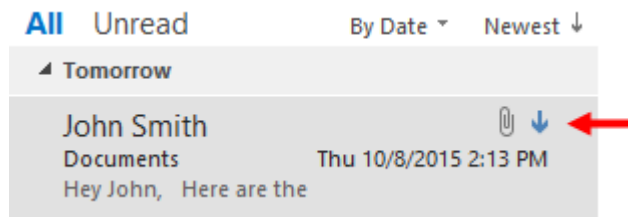
- Examine the Quick Steps gallery in the Home tab. You will see the Quick Step that you just created:



10. Click to select any message from your Inbox. Then, click the Mark Low Importance Quick Step from the Quick Steps gallery on the Home tab:



11. The selected message will be marked as read (if it wasn't already) and its importance will be set to low:



12. Close Microsoft Outlook 2016.

Summary

During this lesson you learned about the different ways that you can customize the Outlook environment and use Quick Steps to help save you time. You should now be comfortable customizing both the Quick Access toolbar and the ribbon. Additionally, you should be comfortable using the default Quick Steps as well as creating your own.

REVIEW QUESTIONS

1. How do you open the Outlook Options dialog box?
2. What is a quick way to remove a command from the Quick Access toolbar?
3. How do you minimize the ribbon interface?
4. What are Quick Steps?
5. How do you reset Quick Steps?

LESSON LABS

Lesson 1

LESSON LAB 1-1

Objective	To understand how to get started with Outlook 2016.
Briefing	Your organization is implementing Outlook 2016 as its e-mail client. A colleague doesn't know how to attach a file to an e-mail and has asked you to help.
Task	<p>First, find an article in Outlook Help on how to add an attachment to an e-mail message. Copy its contents.</p> <p>Create a new e-mail message and paste the copied article into the body of the new message. Enter "How to add an attachment" into the Subject field of the e-mail. Address this e-mail to your colleague and then send it.</p>
Hints	You can open Outlook Help by pressing the F1 key on your keyboard.

Lesson 2

LESSON LAB 2-1

Objective	To understand how to compose messages and check them for spelling and grammatical errors.
Briefing	You are sending a colleague a message about an upcoming presentation. Before you send it, you would like to check it for spelling and grammatical errors.
Task	<p>Pair up with another student. Create a new message and address it to your partner. In the Subject field, type “Presentation Supplies.” Enter the following text into the body of the message:</p> <p>For the upcoming presination, can you please bring your laptop along with an HDMI cord. We will need that to conect to the projector. Thanks.</p> <p>Use the spelling and grammar checker to check this text for any errors and make any corrections.</p>
Hints	You can launch the spelling and grammar checker by pressing F7 on your keyboard.
Follow-Up Questions	Try using the Address Book to find the e-mail address for your partner.

LESSON LAB 2-2

Objective To understand how to format message content and how to attach files to a message.

Briefing You created a message to remind a colleague to bring some supplies to an upcoming presentation. You would like to better format this message and include an attachment.

Task Remove the bold text effect that has been applied to the text in the body of the Sample Data message. Change the font to Arial and increase the font size to 12. Apply the underline text effect to the words “HDMI” and “laptop.”

Sample Data



Lesson Lab 2-2
Outlook Item
43.5 KB

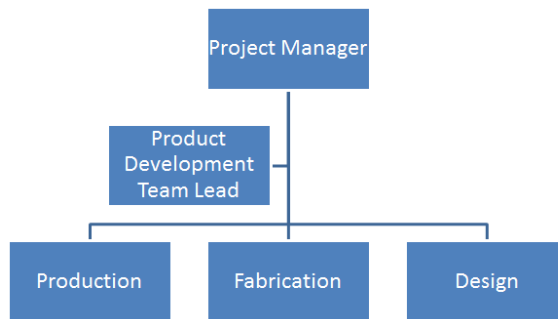


Lesson Lab 2-2
Microsoft PowerPoint Presentation
948 KB

Follow-Up Questions Attach the provided PowerPoint file to the message.

LESSON LAB 2-3

- Objective** To understand how to use SmartArt.
- Briefing** You are about to send an e-mail message to a colleague about an upcoming presentation, but you realize that an organization chart might need to be included in the presentation.
- Task** Below the first two lines of text in the body of the message, insert a SmartArt organization chart like this one:




- Hints** The Organization Chart is found in the Hierarchy category of the Choose a SmartArt Graphic dialog box.

- Sample Data**  Lesson Lab 2-3
Outlook Item
16.8 MB

- Follow-Up Questions** Ensure that your signature is configured to include your name and job title.

Lesson 3

LESSON LAB 3-1

Objective	To understand how to read and respond to messages.
Briefing	In continuing to plan for an upcoming presentation, you would like some feedback from your team. Unfortunately, after you send the message, you realize that you sent it to the wrong person.
Task	<p>Enable the Conversations feature if it hasn't yet been turned on.</p> <p>Open the Sample Data message. Add voting buttons to this message. Ensure that the Yes and No button are included. Send the message to a partner.</p> <p>Try to recall the message.</p>
Hints	To recall a message, open the send message and then click Message → Actions → Recall This Message. Note that Microsoft Exchange Server is required for this feature to work.
Sample Data	 Lesson Lab 3-1 Outlook Item 17.1 MB
Follow-Up Questions	Enable Message Preview and examine the results. If you like the results you can leave it enabled. If not, disable the feature.

Lesson 4

LESSON LAB 4-1

- Objective** To understand how to manage your messages.
- Briefing** You have received a message, but you are very busy at the moment. You would like to flag it for follow-up later today.
- Task** Exchange the Sample Data message with a partner. When you receive this message, mark it as read without opening it. Next, flag it for follow-up today.
- Create a new folder that is named “Personal” and is a subfolder of the Inbox folder.

Sample Data



Lesson Lab 4-1
Outlook Item
17.1 MB

Lesson 5

LESSON LAB 5-1

Objective	To understand how to view the calendar and manage appointments.
Briefing	You would like to add an upcoming presentation into your calendar as an appointment.
Task	Create a new appointment for next Friday between the hours of 10:00 and 11:00 AM. In the Subject field, type “Presentation.” In the Location field, type “Building C – Boardroom 102.” Ensure that the Show As setting is set to Out of Office.
Hints	You can create a new appointment by pressing Ctrl + N with the Calendar workspace open.
Follow-Up Questions	Try applying the Work Week calendar grid arrangement.

LESSON LAB 5-2

Objective	To understand how to manage meetings.
Briefing	You would like to create a new meeting for next Wednesday so that your team can get together and prepare for Friday's presentation.
Task	Pair up with another student. Create a new meeting for next Thursday between the hours of 2:00 and 4:00 PM. In the Subject field, type "Presentation Preparation." In the Location field, type "Boardroom." Enter your partner's e-mail address into the To field as a recipient. Send the meeting request.
Follow-Up Questions	Something has come up and you will need to reschedule the meeting for another date. Cancel the meeting that you just created.

Lesson 6

LESSON LAB 6-1

Objective	To understand how to manage your contacts.
Briefing	You would like to add more contacts to Outlook 2016.
Task	<p>Pair up with another student. Create a new contact for your partner. Include your partner's first and last name, company, job title, and e-mail address. Save this contact.</p> <p>Print the contact that you just created using the Memo Style.</p>
Follow-Up Questions	Try applying the Card contact view.

Lesson 7

LESSON LAB 7-1

Objective To understand how to work with tasks and notes.

Briefing To help keep yourself organized for the upcoming week, you would like to create a task as well as a note.

Task Open the Tasks workspace and create a new task. In the Subject field, type “Draft RFP.” Set the “Start date” to next Tuesday and the “Due date” to next Thursday.

Create a note that includes the following information:

Proposed members of the project team:
John Smith
Jane Doe
Jackie Johnson

Hints You can open the Notes workspace by clicking the Notes button in the Navigation pane.

Follow-Up Questions You had some extra time that you put towards the Draft RFP task. Change the percent complete for this task to 30%.

Lesson 8

LESSON LAB 8-1

Objective	To understand how to customize the Outlook 2016 environment.
Briefing	Now that you have become more familiar with Outlook 2016 and its interface, you would like to customize it.
Task	Customize the Quick Access toolbar so that it includes all of the commands that you most frequently use. Create a new Quick Step that will move a message to the Personal folder in your mailbox. (If you do not have a Personal folder, create one.)
Hints	You can quickly add or remove commands to or from the Quick Access toolbar using the drop-down arrow on its right-hand side.
Follow-Up Questions	Open the Outlook Options dialog box to the General category and ensure that Outlook 2016 is set to be the default program for e-mail, contacts, and calendar.

COURSE WRAP-UP

Post-Course Assessment

- 1. What type of program is Outlook 2016?**
 - A. Spreadsheet application
 - B. Calculator
 - C. E-mail client
 - D. Word processor
- 2. The Clutter folder is where _____ messages are automatically moved based on your previous reading behavior.**
 - A. Mailing list
 - B. Important
 - C. Low priority
 - D. Junk
- 3. What is the default message format in Outlook 2016?**
 - A. HTML
 - B. RTF
 - C. Text
 - D. Plain
- 4. How many lines does the Message Preview feature show by default?**
 - A. 1
 - B. 2
 - C. 3
 - D. 5
- 5. What happens when you apply a color category for the first time?**
 - A. The Outlook Options dialog box will be displayed
 - B. The Message dialog box will be displayed
 - C. The Rename Category dialog box will be displayed
 - D. Nothing
- 6. Which of the following is a calendar view?**
 - A. Daily
 - B. Work Weekend
 - C. Quarterly
 - D. Schedule View

- 7. What is the default reminder for an appointment or meeting?**
- A. 5 minutes
 - B. 15 minutes
 - C. 30 minutes
 - D. 1 day
- 8. Which of the following is a contact view?**
- A. Name
 - B. Business Card
 - C. Mobile Phone
 - D. Business
- 9. What is the default reminder time for a task?**
- A. 10:00 AM
 - B. 12:00 PM
 - C. 9:05 AM
 - D. 8:00 AM
- 10. What is the command sequence to open the Outlook Options dialog box?**
- A. Home → Properties
 - B. File → Outlook Options
 - C. File → Options
 - D. File → Properties

Course Summary

Congratulations on completing the first part of Microsoft Office Outlook 2016 training. During this course, you learned how to:

- Navigate the Outlook interface
- Perform basic e-mail functions
- Use Outlook help
- Create an e-mail message
- Check spelling and grammar
- Format message content
- Attach files and items to an e-mail message
- Enhance an e-mail message
- Manage automatic message content
- Customize reading options
- Work with attachments
- Manage your message responses
- Manage messages using tags, flags, and other commands
- Organize messages using folders
- View and print the calendar
- Manage appointments and meetings
- Create, update, view, and organize contacts
- Manage tasks and notes
- Customize the Outlook interface
- Create and manage Quick Steps

You should now feel comfortable with the elements of the Outlook 2016 interface and using it to complete basic e-mail management tasks. Additionally, you should be familiar with many of the productivity features that are found in Outlook. You should now understand how Outlook can be used to manage your contacts, work with tasks, and take notes. Finally, you should be comfortable customizing Outlook 2016 to suit your own unique workflow.

Next Steps

The next course in this series is Microsoft Office Outlook 2016 – Part 2. Topics to be covered will include:

- Configuring advanced message options
- Advanced message, calendar, contact, and task management
- Sharing workspaces with others
- Managing Outlook data files
- Managing e-mail security

We look forward to welcoming you to this upcoming workshop.

Answer Keys

LESSON 1 REVIEW QUESTIONS

1. What kind of application is Outlook 2016?

Outlook 2016 is an e-mail client and personal information manager.

2. How do you access Backstage view?

To access Backstage view, click the File tab.

3. What is the difference between Reply and Reply All?

The Reply command will allow you to compose a reply that will be sent to only the original sender. The Reply All command will compose a reply that will be sent to the original sender and anyone that was copied on the e-mail.

4. What is the Clutter folder?

The Clutter folder is where low priority messages are automatically moved based on your previous reading behavior. This feature is available with Office 365.

5. What options can be provided when using the Tell Me feature?

Typically you will see shortcuts to related commands as well as an option to open the traditional Help window and a command for Smart Lookup.

LESSON 2 REVIEW QUESTIONS

1. **What is the keyboard shortcut to launch the spelling and grammar checker?**

The keyboard shortcut to launch the spelling and grammar checker is F7.

2. **What is the default message format that is used in Outlook 2016 by default?**

The default message format that is used in Outlook 2016 by default is HTML.

3. **What does the attachment reminder feature do?**

This feature will remind you to attach an item to an outgoing message if it detects the word “attachments” or other related words.

4. **What are Quick Parts?**

Quick Parts are used to create and save specific pieces of content that are frequently reused so that you can quickly add them to future messages.

5. **What is the command sequence to configure signatures in Outlook 2016?**

Click Insert → Signature → Signatures.

LESSON 3 REVIEW QUESTIONS

1. What happens if you click a desktop alert?

If you click a desktop alert, the Outlook item that is related to the alert in question will be displayed in a separate window.

2. How many lines does the Message Preview feature show by default?

The Message Preview feature shows one line by default.

3. Are conversations enabled by default?

No, conversations are not enabled by default. This feature must be toggled on manually by clicking View → Show as Conversations.

4. How do you preview a file attachment?

To preview an attachment, click on the attachment listing in the message. Alternatively, you can right-click the attachment and click Preview.

5. What does the Resend command do?

The Resend option allows you to open a sent message, make changes to it, and resend it.

LESSON 4 REVIEW QUESTIONS

1. **What is the command sequence to mark a message as unread?**

Click Home → Unread/Read.

2. **What happens when you apply a color category for the first time?**

When you apply a color category for the first time, the Rename Category dialog box will be displayed. Here, you are able to give this new category a name and assign it a keyboard shortcut.

3. **What is the command sequence to set the follow-up quick click flag?**

This command sequence is Home → Follow-Up → Set Quick Click.

4. **What happens when you choose to ignore a conversation?**

The selected conversation and any new messages in it will automatically be moved to the Deleted Items folder.

5. **What is the command sequence to create a new folder in your mailbox?**

Click Folder → New Folder.

LESSON 5 REVIEW QUESTIONS

1. What are the five calendar views?

The five calendar views are Day, Work Week, Week, Month, and Schedule View.

2. What is the default reminder for an appointment or meeting?

The default reminder is 15 minutes.

3. What is the keyboard shortcut to search your calendar?

This keyboard shortcut is Ctrl + E.

4. What options are available when you propose a new time for a meeting request?

The options that are available include tentatively accepting the meeting time and proposing a new time, as well as declining the meeting request and also proposing a new time.

5. What print style would you choose if you wanted to show your tasks, daily timetable, and weekly schedule all on the same page?

In this case, you would choose the Tri-fold Style.

LESSON 6 REVIEW QUESTIONS

1. In what workspace are contacts listed in Outlook 2016?

Contacts are listed in the People workspace.

2. How do you open the contact form?

To open the contact form, click Home → New Contact.

3. What is the command sequence to forward your contact as a business card?

Click Home → Forward Contact → As a Business Card.

4. What are the five contact views?

The five contact views are People, Business Card, Card, Phone, and List.

5. What is the command sequence to display the People pane in the normal state?

Click View → People Pane → Normal

LESSON 7 REVIEW QUESTIONS

1. What is a server task?

A server task is any task that has been assigned to you via a service like Microsoft Exchange Server or Microsoft SharePoint Server.

2. What is the default reminder time for a task?

The default reminder time for a task is 8:00 AM.

3. What is the command sequence to assign a task to someone else?

Click Task → Assign Task.

4. How do you move a task from one task list to another?

To move a task from one task list to another, drag and drop the task in question from the open list to another list in the Navigation pane.

5. How do you open the Notes workspace?

To open the Notes workspace, click the More button at the bottom of the Navigation pane and then click the Notes option

LESSON 8 REVIEW QUESTIONS

1. How do you open the Outlook Options dialog box?

To open the Outlook Options dialog box, click File → Options.

2. What is a quick way to remove a command from the Quick Access toolbar?

Right-click on the target command and click “Remove from Quick Access Toolbar.”

3. How do you minimize the ribbon interface?

Click the Ribbon Display Options button near the upper right-hand corner of the Outlook window and then click Show Tabs.

4. What are Quick Steps?

Quick Steps are customizable groups of actions that are used to complete one or more common tasks quickly.

5. How do you reset Quick Steps?

To reset Quick Steps, open the Manage Quick Steps dialog and click “Reset to Defaults.”

POST-COURSE ASSESSMENT

1. What type of program is Outlook 2016?

- A. Spreadsheet application
- B. Calculator
- C. E-mail client
- D. Word processor

Outlook 2016 is an e-mail client.

2. The Clutter folder is where _____ messages are automatically moved based on your previous reading behavior.

- A. Mailing list
- B. Important
- C. Low priority
- D. Junk

The Clutter folder is where low priority messages are automatically moved based on your previous reading behavior.

3. What is the default message format in Outlook 2016?

- A. HTML
- B. RTF
- C. Text
- D. Plain

The default message format in Outlook 2016 is HTML.

4. How many lines does the Message Preview feature show by default?

- A. 1
- B. 2
- C. 3
- D. 5

The Message Preview feature shows one line by default.

5. What happens when you apply a color category for the first time?

- A. The Outlook Options dialog box will be displayed
- B. The Message dialog box will be displayed
- C. The Rename Category dialog box will be displayed
- D. Nothing

When you apply a color category for the first time, the Rename Category dialog box will be displayed.

6. Which of the following is a calendar view?

- A. Daily
- B. Work Weekend
- C. Quarterly
- D. Schedule View

The five calendar views are Day, Work Week, Week, Month, and Schedule View.

7. What is the default reminder for an appointment or meeting?

- A. 5 minutes
- B. 15 minutes
- C. 30 minutes
- D. 1 day

The default reminder is 15 minutes.

8. Which of the following is a contact view?

- A. Name
- B. Business Card
- C. Mobile Phone
- D. Business

The five contact views are People, Business Card, Card, Phone, and List.

9. What is the default reminder time for a task?

- A. 10:00 AM
- B. 12:00 PM
- C. 9:05 AM
- D. 8:00 AM

The default reminder for a task is 8:00 AM.

10. What is the command sequence to open the Outlook Options dialog box?

- A. Home → Properties
- B. File → Outlook Options
- C. File → Options**
- D. File → Properties

The command sequence to open the Outlook Options dialog box is File → Options.

APPENDICES

Keyboard Shortcut Quick Reference Sheet

Search	Go to the Search field	F3 or Ctrl + E
	Use Advanced Find	Ctrl + Shift + F
	Find a contact	F11
Toggle Workspaces	Go to Mail workspace	Ctrl + 1
	Go to Calendar workspace	Ctrl + 2
	Go to People workspace	Ctrl + 3
	Go to Tasks workspace	Ctrl + 4
	Go to Notes workspace	Ctrl + 5
	Go to Folder List view	Ctrl + 6
Message Management	Send an e-mail message	Alt + S
	Go to next message while in Message window	Ctrl + .
	Go to previous message while in Message window	Ctrl + ,
	Flag message for follow-up	Ctrl + Shift + G
	Delete item	Ctrl + D
	Print item	Ctrl + P
	Reply to an e-mail	Ctrl + R
	Reply to all recipients of an e-mail	Ctrl + Shift + R
	Open the Address Book	Ctrl + Shift + B
F O	Apply bold formatting	Ctrl + B

	Apply underlining	Ctrl + U
	Apply italic formatting	Ctrl + I
	Highlight text	Ctrl + Alt + H
	Align text to left	Ctrl + L
	Align text to right	Ctrl + R
	Increase font size	Ctrl + Shift + .
	Decrease font size	Ctrl + Shift + ,
	Create a link	Ctrl + K
	Check spelling	F7
	Undo	Ctrl + Z
	Redo	Ctrl + Y
Item Creation	Create a new item of the default type for the current workspace	Ctrl + N
	Create a new appointment	Ctrl + Shift + A
	Create a new meeting request	Ctrl + Shift + Q
	Create a new contact	Ctrl + Shift + C
	Create a new e-mail message	Ctrl + Shift + M
	Create a new task	Ctrl + Shift + K
	Create a new note	Ctrl + Shift + N

Mapping to Microsoft Office Exam Outlook 2016 77-731

Many of our courses can be used to prepare for Microsoft Office Specialist certifications. The following tables list the requirements for Microsoft Office Outlook 2016 Exam 77-731 and where they can be found in the Microsoft Outlook 2016 courseware.

<i>Skill Area 1: Manage the Outlook Environment for Productivity</i>		
<i>Skill Area</i>	<i>Key Lessons</i>	<i>Relevant Course Area</i>
Customize Settings	Customize reply messages	Part 1, Lesson 3-A
	Change text formats for all outgoing messages	Part 1, Lesson 3-A
	Customize the Navigation Pane	Part 2, Lesson 1-B
	Configure reviews	Part 1, Lesson 3-C
	Manage multiple accounts	Part 2, Lesson 1-B
	Add an account	Part 2, Lesson 6-B
Print and Save Information	Print message, calendar, contact, or task information	Part 1, Lesson 1-B Part 1, Lesson 5-D Part 1, Lesson 6-B Part 1, Lesson 7-A
	Save message attachments	Part 1, Lesson 2-D
	Preview attachments	Part 1, Lesson 3-B
	Save messages in alternate formats	Part 2, Lesson 2-F
	Export messages to a	Part 2, Lesson 6-A

	data file	
Perform Search Operations in Outlook	Create new search folders	Part 2, Lesson 2-D
	Search for items in messages, tasks, contacts, or calendars	Part 1, Lesson 5-B Part 1, Lesson 6-B Part 1, Lesson 7-B Part 2, Lesson 2-D
	Search by using advanced find	Part 2, Lesson 2-D
	Search by folder	Part 2, Lesson 2-D

<i>Skill Area 2: Manage Messages</i>		
<i>Skill Area</i>	<i>Key Lessons</i>	<i>Relevant Course Area</i>
Configure Mail Settings	Set fonts for new messages and responses	Part 1, Lesson 3-F
	Create, assign, and modify signatures	Part 1, Lesson 2-F
	Create and manage rules	Part 2, Lesson 1-C
	Create automatic replies	Part 2, Lesson 1-C
	Create messages by using Quick Parts	Part 2, Lesson 1-B
	Configure Junk Email and Clutter settings	Part 1, Lesson 1-B Part 2, Lesson 2-E
Create Messages	Create a message	Part 1, Lesson 1-B
	Add or remove message attachments	Part 1, Lesson 2-D
	Add cc and bcc to messages	Part 1, Lesson 1-B Part 2, Lesson 1-B
	Add tracking and voting options	Part 1, Lesson 3-C
	Forward and reply to messages	Part 1, Lesson 1-B
	Request a delivery or read receipt	Part 1, Lesson 3-C
	Redirect replies	Part 2, Lesson 1-B
	Flag outgoing messages for follow up, importance, and sensitivity	Part 2, Lesson 1-B
	Recall a message	Part 1, Lesson 3-C

Format a Message	Format text	Part 1, Lesson 2-C
	Insert hyperlinks	Part 2, Lesson 1-A
	Apply themes and styles	Part 1, Lesson 2-E
	Insert messages	Part 1, Lesson 2-D
	Add a signature to specific messages	Part 1, Lesson 2-F
Organize and Manage Messages	Sort messages	Part 2, Lesson 2-A
	Move messages between folders	Part 1, Lesson 1-B
	Add new local folders	Part 1, Lesson 4-B
	Apply categories	Part 1, Lesson 4-A
	Clean up messages	Part 1, Lesson 4-A
	Mark a message as read or unread	Part 1, Lesson 4-A
	Flag received messages	Part 1, Lesson 4-A
	Ignore messages	Part 1, Lesson 4-A
	Sort messages by conversation	Part 1, Lesson 3-A
	Delete messages	Part 1, Lesson 1-B
	Automate repetitive tasks by using Quick Steps	Part 1, Lesson 8-B
	Configure basic Auto Archive settings	Part 2, Lesson 2-F
	Delegate access	Part 2, Lesson 5-A

<i>Skill Area 3: Manage Schedules</i>		
<i>Skill Area</i>	<i>Key Lessons</i>	<i>Relevant Course Area</i>
Create and Manage Calendars	Create and add calendars	Part 2, Lesson 3-B
	Adjust viewing details for calendars	Part 1, Lesson 5-A
	Modify calendar time zones	Part 2, Lesson 3-A
	Delete calendars	Part 1, Lesson 5-A
	Set calendar work times	Part 2, Lesson 3-A
	Manage multiple calendars	Part 2, Lesson 3-B
	Manage calendar groups	Part 2, Lesson 3-C
	Display multiple calendars	Part 1, Lesson 5-A
	Share calendars	Part 2, Lesson 5-B
Create Appointments, Meetings, and Events	Create calendar items	Part 1, Lesson 5-B
	Create recurring calendar items	Part 1, Lesson 5-B
	Cancel calendar items	Part 1, Lesson 5-C
	Create calendar items from messages	Part 1, Lesson 1-B
	Set calendar item times	Part 1, Lesson 5-B
	Set up meetings by using the scheduling assistant	Part 1, Lesson 5-C

	Set free or busy status for calendar items	Part 1, Lesson 5-B
	Schedule resources	Part 1, Lesson 5-C
	Set up meeting location by using Room Finder	Part 1, Lesson 5-C
Organize and Manage Appointments, Meetings, and Events	Set calendar item importance	Part 1, Lesson 5-B
	Forward calendar items	Part 1, Lesson 5-B
	Configure reminders	Part 1, Lesson 5-B
	Add participants	Part 1, Lesson 5-C
	Respond to invitations	Part 1, Lesson 5-C
	Update individual or recurring calendar items	Part 1, Lesson 5-B
	Share meeting notes	Part 1, Lesson 5-C
	Categorize calendar items	Part 1, Lesson 5-B
Create and Manage Notes and Tasks	Create and manage tasks	Part 1, Lesson 7-A
	Create and organize notes	Part 1, Lesson 7-B

<i>Skill Area 4: Manage Contacts and Groups</i>		
<i>Skill Area</i>	<i>Key Lessons</i>	<i>Relevant Course Area</i>
Create and Manage Contacts	Create a new contact	Part 1, Lesson 6-A
	Delete contacts	Part 1, Lesson 6-A
	Import contacts from external sources	Part 1, Lesson 6-A
	Edit contact information	Part 1, Lesson 6-A
	Attach an image to a contact	Part 1, Lesson 6-A
	Add tags to contacts	Part 1, Lesson 6-A
	Share contacts	Part 2, Lesson 5-C
	Create and manage address books	Part 1, Lesson 6-A
Create and Manage Contact Groups	Create new contact groups	Part 2, Lesson 4-B
	Add contacts to existing contact groups	Part 2, Lesson 4-B
	Add notes to a contact group	Part 2, Lesson 4-B
	Update contacts within contact groups	Part 2, Lesson 4-B
	Delete contact groups	Part 2, Lesson 4-B
	Delete contact group members	Part 2, Lesson 4-B

Glossary

address book

A central repository for Outlook contacts.

appointments

An activity that does not require any attendee or resource management tools.

attachment

A file that has been included with an e-mail message.

AutoCorrect

Feature used to check for and correct common spelling and grammatical errors as you type.

color categories

Feature that is used to classify Outlook objects.

conversations

A feature in Outlook that will group and organize messages that share the same subject line into a single conversation thread.

contacts

Anyone that you have communicated with using Outlook 2016.

desktop alerts

Notifications that appear near the lower right-hand corner of the screen when events occur, such as a new e-mail message or upcoming due date.

electronic business cards

Used to easily share contact information with others.

e-mail client

Software application that facilitates sending, receiving, and managing e-mail.

Global Address List

A central list of all users, resources, and groups on a Microsoft Exchange Server.

Live Preview

Feature that allows you to see how formatting changes will appear before they are applied.

MailTips

A real-time feedback mechanism that will provide you with tips and information about the message that you are composing.

meetings

An Outlook object that includes attendee and resource management features.

Microsoft Exchange Server

A messaging system that provides mail server and user collaboration features in a business environment.

mini toolbar

A small floating toolbar that appears while hovering your cursor over a selected object or right-clicking. Typically contains some of the most popular commands related to the active object.

notes

Small digital objects that allow you to record pieces of information.

Peeks

Feature that allows you to preview a workspace's contents.

personal folders

A set of folders that are created and stored in an Outlook Data File (.pst). Stored on a local computer, separate from the mail account.

Quick Steps

Custom commands that will complete several actions with one click.

signature

Customizable closing text and/or graphics that accompany each e-mail that you send.

SmartArt

Feature that allows you to easily create and modify diagrams.

styles

A saved set of formatting options that are used to help keep message text consistent.

tasks

Outlook items that are used to define and track activities that need to be completed by a specific date and/or time.

Tell Me

Natural language help feature accessed directly on the ribbon interface.

themes

A combination of preset colors, fonts, and effects that allow you to apply a consistent look amongst all of the content that you create or add to an e-mail message.

WordArt

A tool that is used to stylize message text using various special effects.

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