

Microsoft Office Outlook 2016: Level 2

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ABOUT THIS COURSE

COURSE PREREQUISITES

This manual assumes the user has completed or has an understanding of the materials covered in the first part of the Microsoft Office Outlook 2016 courseware, including:

- Getting started with Outlook 2016
- Composing messages
- Reading and responding to messages
- Managing your messages, calendar, and contacts
- Working with tasks and notes
- Customizing the Outlook environment

COURSE OVERVIEW

Welcome to the second part of our Microsoft Office Outlook 2016 courseware. Outlook is Microsoft's powerful and easy-to-use personal information management program. This new version of Outlook incorporates some new features and connectivity options in efforts to make managing your e-mail and personal information easier than ever.

This course is intended to help all users get up to speed on the different features of Outlook and to become familiar with its more advanced selection of features. We will cover how to configure advanced message options, use advanced message management options, manage activities

using tasks, edit electronic business cards, share your workspaces with others, manage Outlook data files, and more.

COURSE OBJECTIVES

By the end of this course users should be comfortable in configuring advanced message options, using advanced message management options, managing activities using tasks, editing electronic business cards, sharing your workspaces with others, managing Outlook data files, and managing e-mail security.

HOW TO USE THIS BOOK

This course is broken up into seven 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: CONFIGURING ADVANCED MESSAGE OPTIONS

Lesson Objectives

In this lesson you will learn how to:

- Insert advanced characters and objects
- Modify message settings, properties, and options
- Use automatic replies

TOPIC A: Insert Advanced Characters and Objects

Outlook 2016 supports many different characters and objects that can be inserted into any message that you send. Over the course of this topic, you will learn about the various characters and objects that are supported by Outlook, as well as how to add them to any message that you compose.

Topic Objectives

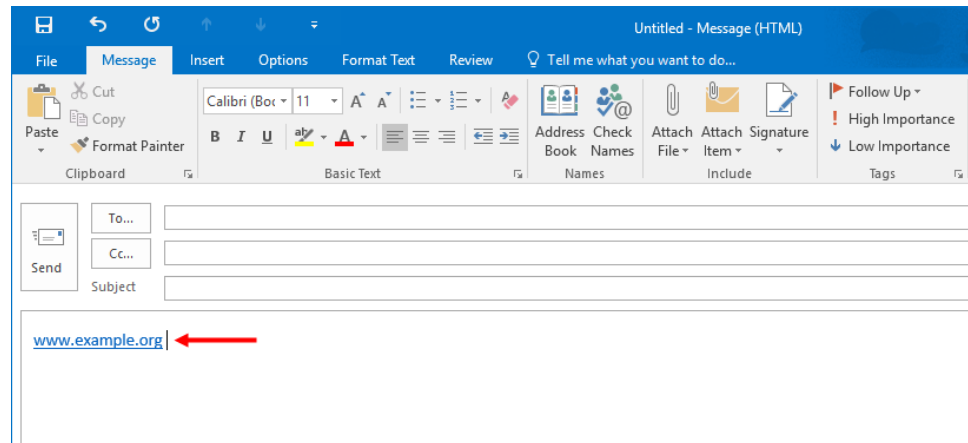
In this topic, you will learn:

- About hyperlinks
- About WordArt
- About equations
- About symbols
- About tables
- About charts
- About the types of charts that are available when composing an e-mail message
- About Quick Parts

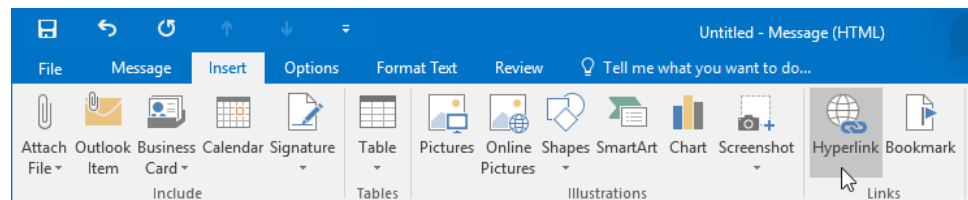
HYPERLINKS

Hyperlinks enable you to navigate around your computer, browse the Internet, and jump to different locations within the same file. Outlook lets you insert hyperlinks into any message that you compose.

To insert a hyperlink into a message, you only need to type the full website address (URL) followed by a space or the Enter key:

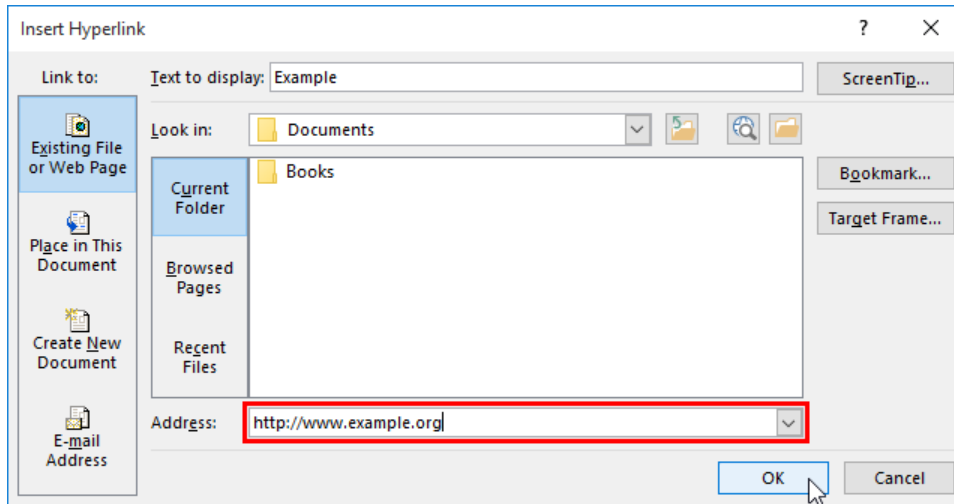


You can also make any existing text in the body of your message a hyperlink by selecting it and then clicking Insert → Hyperlink:



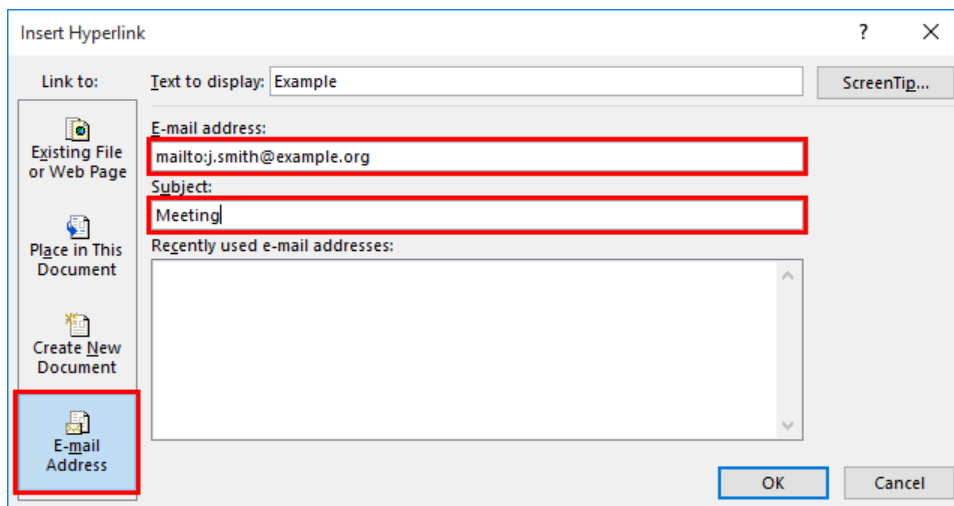
(Alternatively, you can also use the Ctrl + K shortcut.)

This action will display the Insert Hyperlink dialog box. Type the website address that you want the link to point to into the Address text box and click OK:



Note that Outlook will add “http://” to the front of any URL that is entered here.

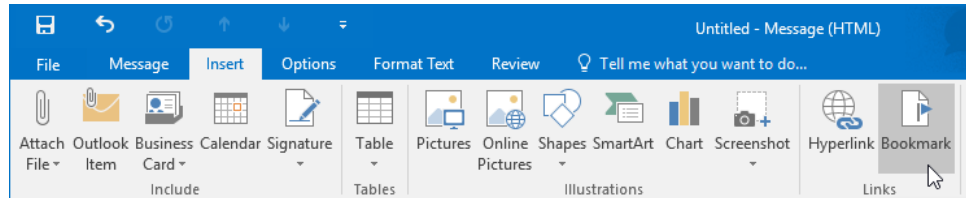
You can also link to an e-mail address by clicking the “E-mail Address” button on the left-hand side of the dialog box. Then, enter the e-mail address that you would like this link to point to and a subject for any message that will be created by clicking this link:



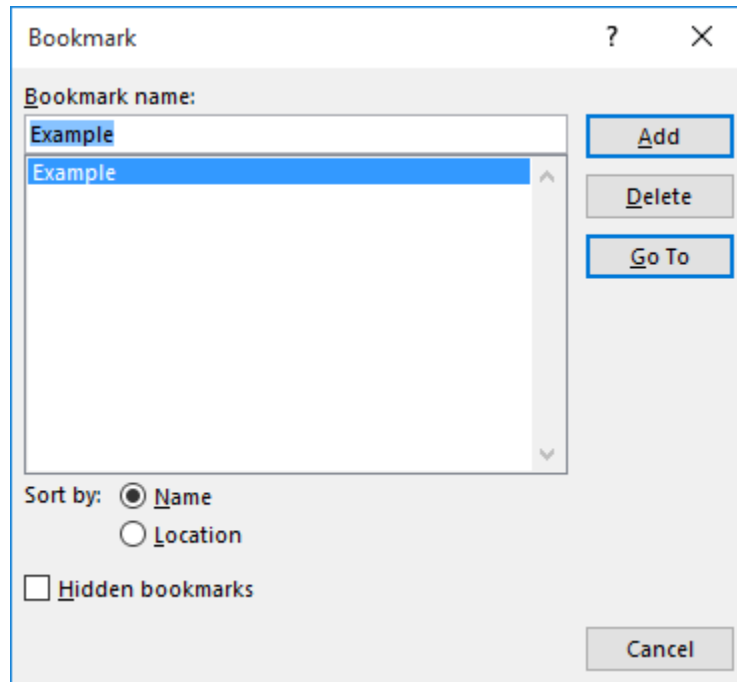
Note that Outlook will add the word “mailto:” in front of the e-mail address that is entered here. This identifies the link as an e-mail link rather than a website link.

Bookmarks

In addition to a typical hyperlink that points to a web page or e-mail address, you have the option to create a hyperlink that points to a specific location in the message. Called **bookmarks**, these types of links are created in a new message by clicking Insert → Bookmark:



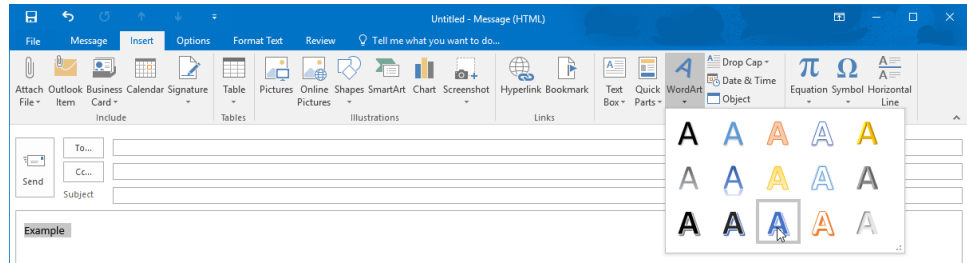
This action will display the Bookmark dialog box. Here, you can add bookmarks to specific portions of the message, delete existing bookmarks, and navigate to locations that have been previously bookmarked:



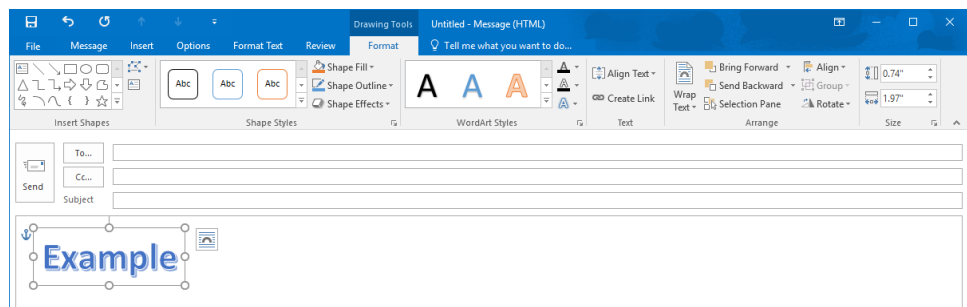
WORDART

WordArt applies graphical styles to selected text within a message. This gives you a quick way to give your messages a more unique style and bring attention to key points.

To apply WordArt to selected text in a message, click Insert → WordArt → [WordArt Style]:



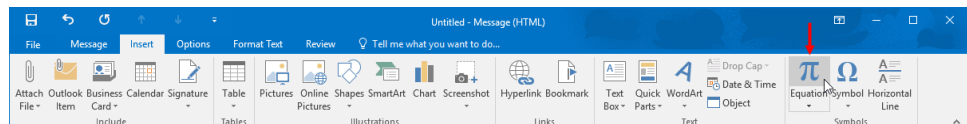
The selected text will then appear in the WordArt style that you selected:



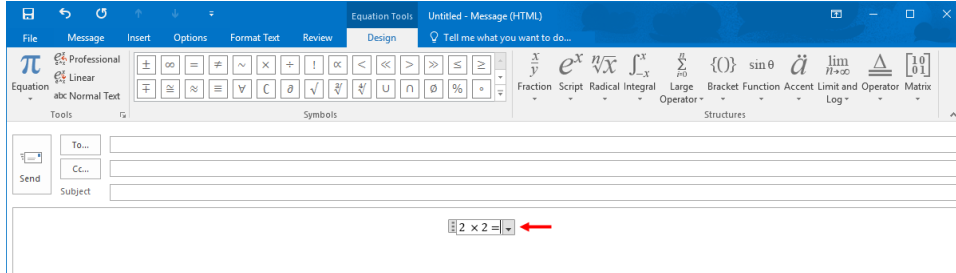
Once WordArt has been inserted into your message, it will automatically be selected. As well, the **Drawing Tools – Format** tab will appear on the ribbon and provide you with controls to tailor the appearance of the WordArt in a number of different ways.

EQUATIONS

Both simple and complex mathematical equations can be inserted directly into any message that you are composing. This is done by placing your cursor where you would like the equation to be inserted and then clicking Insert → Equation:



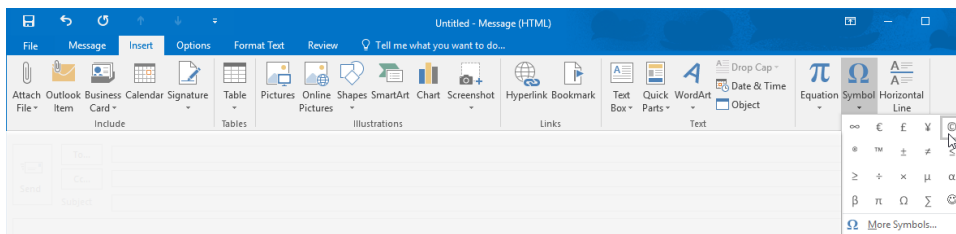
This action will display the **Equation Tools – Design** tab, as well as add an equation field to your message. By using the commands in the Symbols and Structures groups of this tab, as well as typing directly in the equation field, you can build the equation that you would like to add:



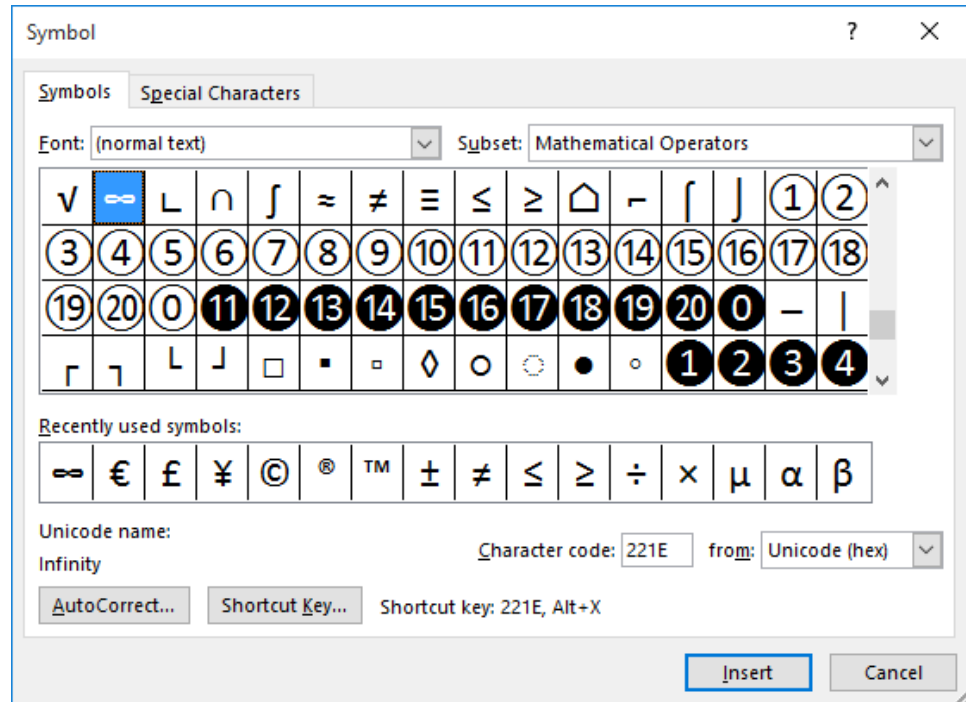
Note that equations are not able to actually calculate values and are intended to be used for display purposes only.

SYMBOLS

Symbols and other special characters can be inserted into a message by clicking **Insert** → **Symbol** → [Symbol]:

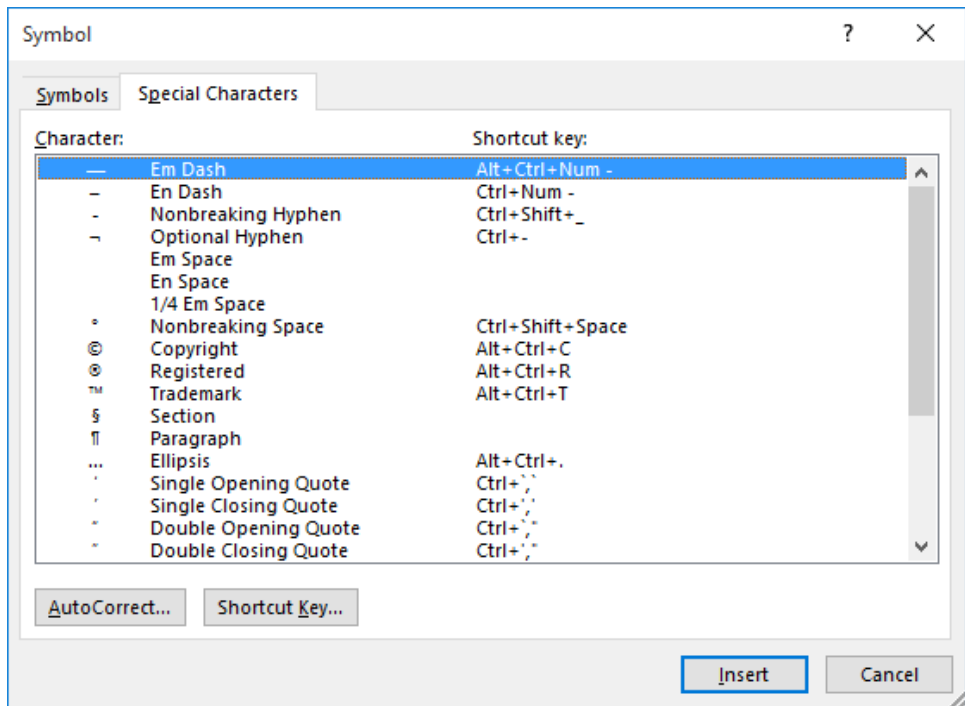


If you do not see the symbol that you would like to add listed in the Symbol drop-down menu, click More Symbols. This action will display the Symbol dialog box:



On the Symbols tab of this dialog box you are given access to a wide range of symbols. Once you select a symbol, you are given the option to assign a shortcut key to it by clicking the Shortcut Key button. Clicking the Insert button with a character selected will insert that character into your message where your cursor was last placed.

In the Special Characters tab of the Symbol dialog box, you are given a list of commonly used characters and what keyboard shortcuts have been assigned to them:



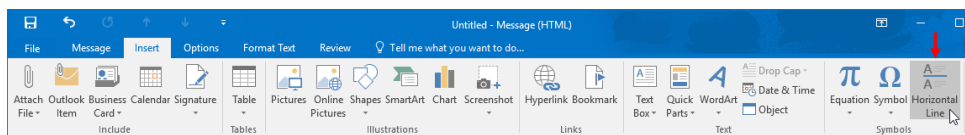
You can also select a special character and click Insert to add it to your message.

Horizontal Lines

Horizontal lines are useful in separating sections of content:

Section 1
Section 2

You can insert such lines into a message by placing your cursor in your message where you want the line to be placed and then clicking Insert → Horizontal Line:

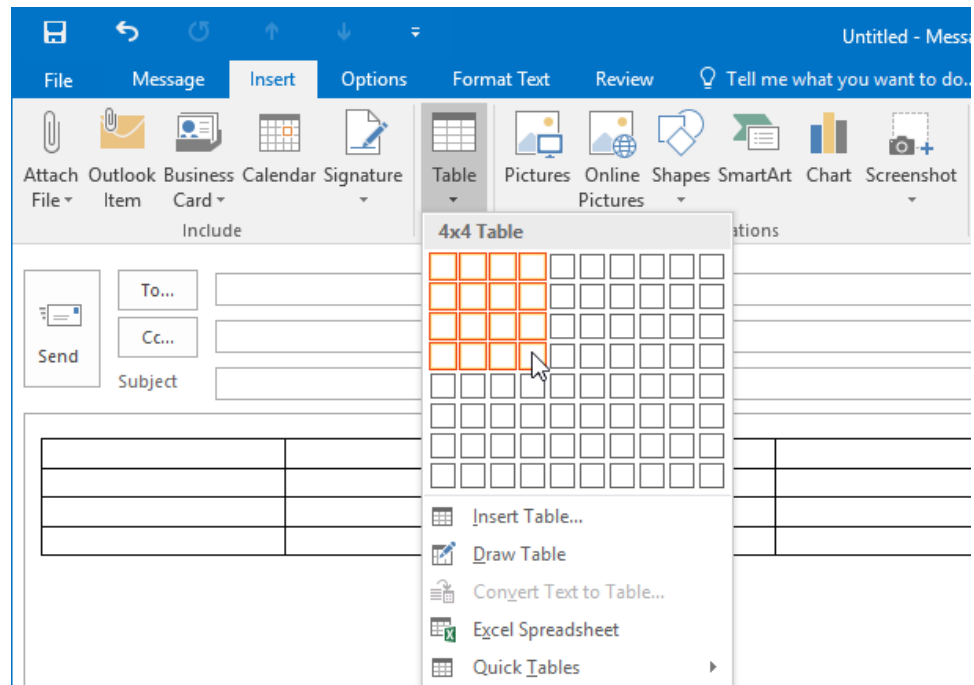


TABLES

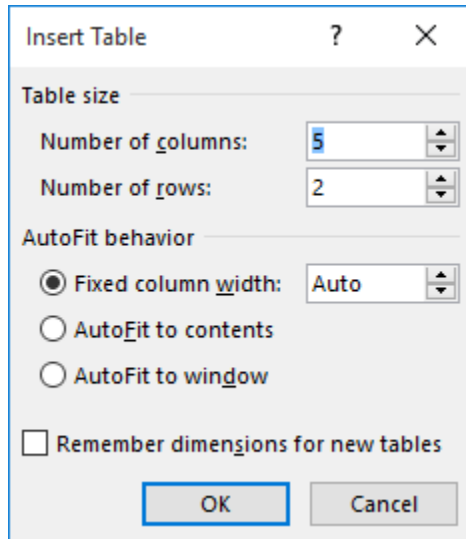
Tables are used to present information in a logical and organized fashion that is easy to read.

To insert a table into an Outlook item, click Insert → Table. This drop-down command will present you with a menu of options that allow you to add a table in a few different ways.

The most straightforward option is to drag your cursor over the provided grid on this menu and click to choose a table size:



If the dimensions of the table exceed those that are available by using the grid, click the Insert Table option. This will display the Insert Table dialog box. Using the controls in this dialog box, you can specify exactly how many rows and columns that you would like in the new table:

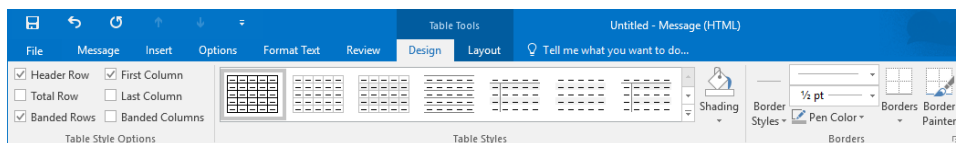


Once you click OK, the table will be added.

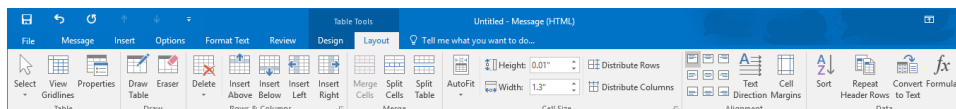
The Table Tools Contextual Tabs

When a table is inserted into an Outlook item or a table is selected, the Table Tools contextual tabs, including the Design and Layout tabs, will be displayed on the ribbon.

The **Design tab** allows you to add certain design elements to tables, including shading, border colors, as well as specialized rows and columns:

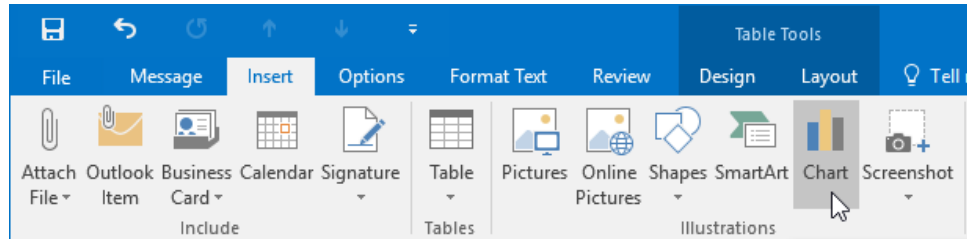


The **Layout tab**, on the other hand, includes commands to modify the number of rows and columns in a table, as well as set table dimensions, alignment options, and more:

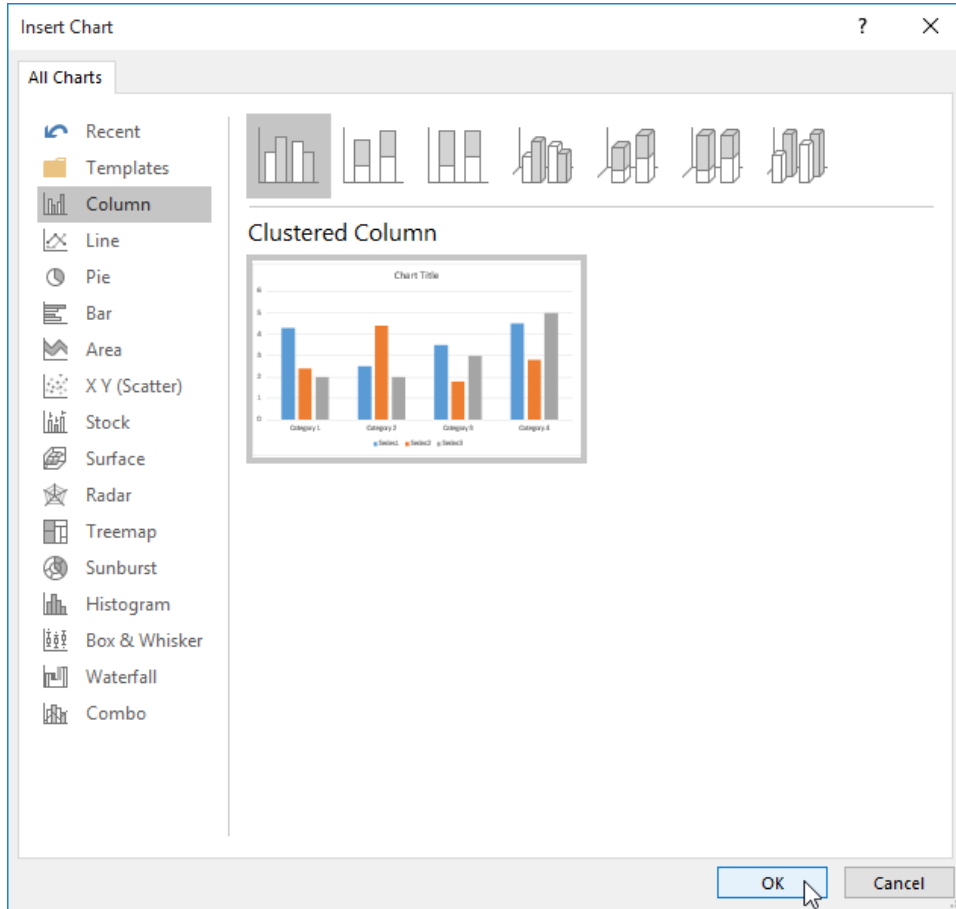


CHARTS

Charts are used to illustrate data in a graphical way. They can be added to an Outlook item by clicking Insert → Chart:

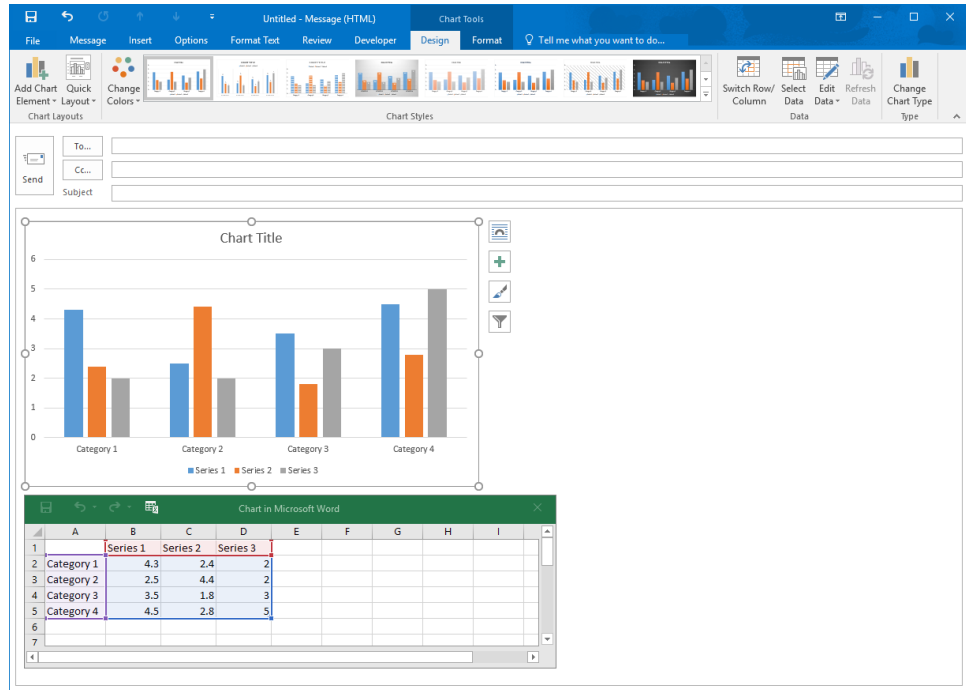


This action will display the Insert Chart dialog box. First, choose a chart template type from the left-hand side of this dialog box. Then, choose a specific chart option on the right-hand side. A preview of the selected chart option will be displayed in the main portion of this dialog box:



Click OK once your options are set.

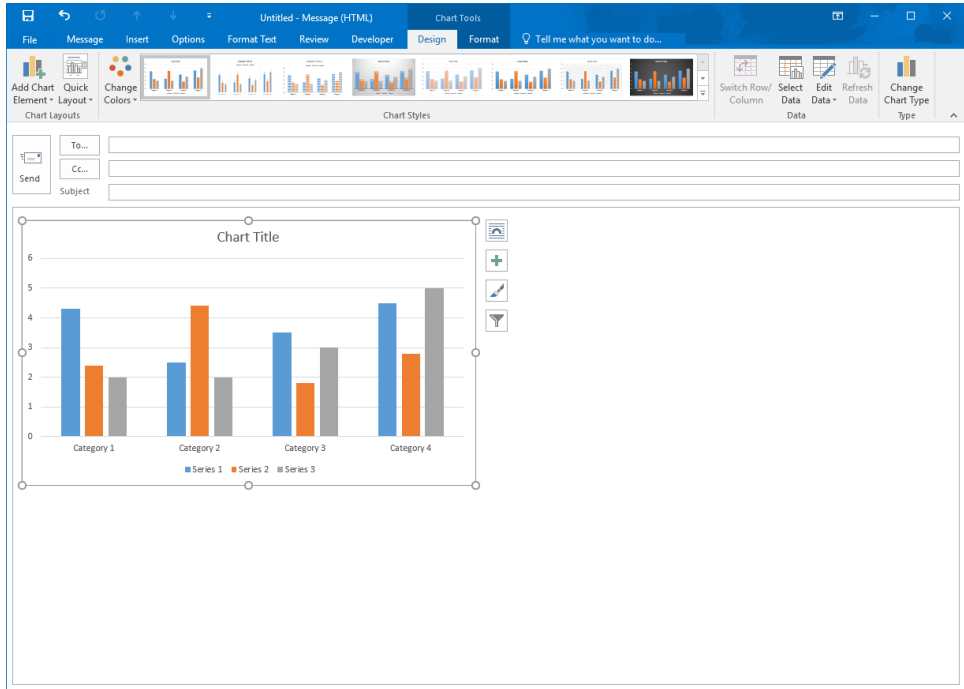
The chart will then be inserted into your message using some default data points. A small Excel window will also be opened automatically:



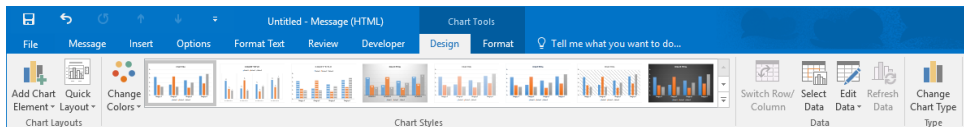
Inside the Excel window, a spreadsheet will be displayed where you can add all of the data that will be represented by the chart that you are building. Once you have finished, close the Excel window to apply these new values to the chart in your e-mail message.

The Chart Tools Contextual Tabs

When a chart is added to an Outlook item or a chart is selected, the Chart Tools contextual tabs (including the Design and Format tabs) will be displayed on the ribbon:



The **Design** tab includes commands that are used to modify the general style of the current chart, including colors, layouts, and the data that it uses:



The **Format** tab is used to add shapes, apply shape styles, apply WordArt styles, and apply arrangement and size changes:

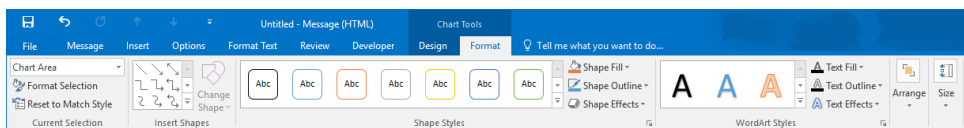
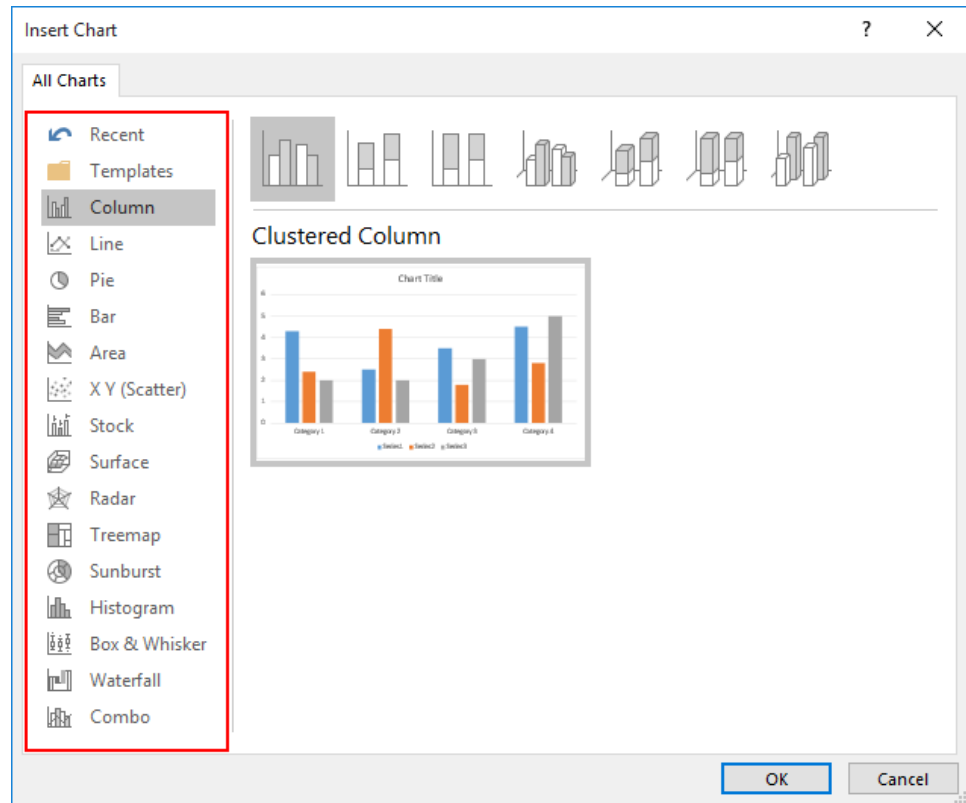


CHART TYPES

When inserting a chart into an Outlook item, you have several different chart types that you can choose from:



Below is a breakdown of each chart type that is available and what data each type is best suited to display:

- **Column:** Best suited to display data changes over time or to compare separate data points.
- **Line:** Typically used to display data changes over a period of time.
- **Pie:** Used to compare different data points in relation to a total. For example, you could use this chart type to show the total expenses of a company broken down by department.
- **Bar:** Typically this chart type is used to compare different data points. It is similar to the Column chart type, but instead has the X-axis as the vertical axis and the Y-axis as the horizontal axis.
- **Area:** This chart type is typically used to illustrate rates of change over a period of time, as well as include the total value in a trend.
- **X Y (Scatter):** Used to illustrate values from a variety of different trends and their relationship to one another.

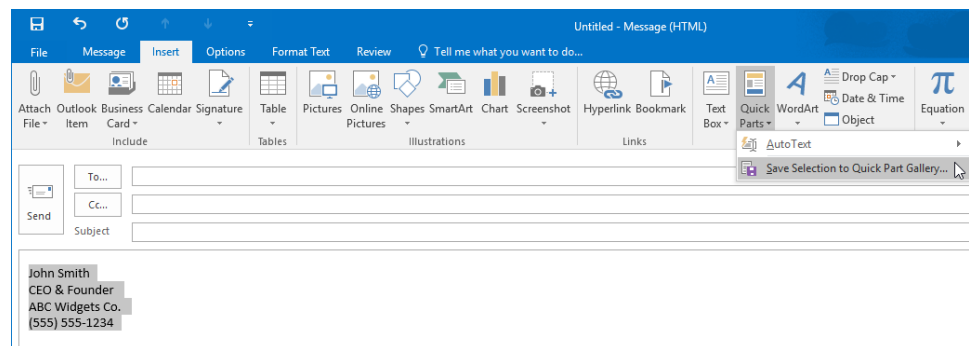
- **Stock:** As the name implies, this chart type is designed to show data fluctuations in a stock market.
- **Surface:** While more complex than other options, this chart type is used to find favorable patterns between two separate data sets.
- **Radar:** This chart type is used to compare values from multiple data sets all on the same chart with each separate data (category) on a separate axis. Typically, this chart type is best suited to identify outliers and commonalities between data points.
- **Treemap:** This chart type is designed to display hierarchical data through nested rectangles. Each branch of the tree is shown as a rectangle which is then tiled with smaller rectangles that show sub-branches.
- **Sunburst:** Displays data hierarchy as a series of rings where each ring represents the children of the ring it encloses.
- **Histogram:** A column chart that is designed to show frequency data.
- **Box & Whisker:** Also known as a box plot, this chart type is designed to depict groups of numerical data as boxes on the chart. These boxes will also have a line that extends from each end (whiskers) that are used to describe upper and lower quartiles.
- **Waterfall:** Sometimes referred to as a flying bricks chart or a Mario chart, this chart type represents data through a series of columns that are suspended in mid-air. These are typically used to understand how an initial value (e.g. sales revenue) is affected by positive or negative values (e.g. staff costs).
- **Combo:** This type of chart combines the features of the bar chart and the line chart. Typically, this type of chart is useful if you need to compare values in different categories.

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:

Create New Building Block ? X

Name: John Smith

Gallery: Quick Parts

Category: General

Description:

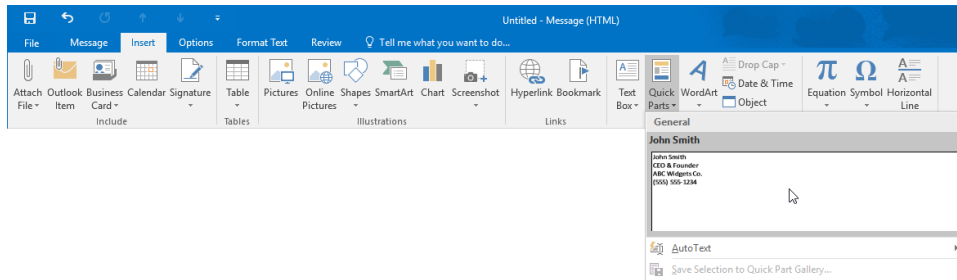
Save in: NormalEmail

Options: Insert content only

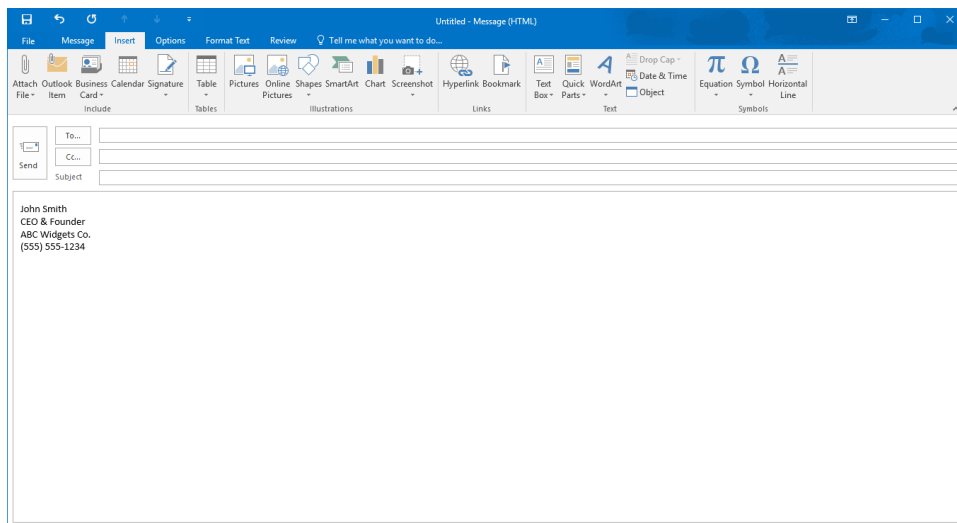
OK Cancel

Using Quick Parts

Once a Quick Part has been created, you can add it to a new 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

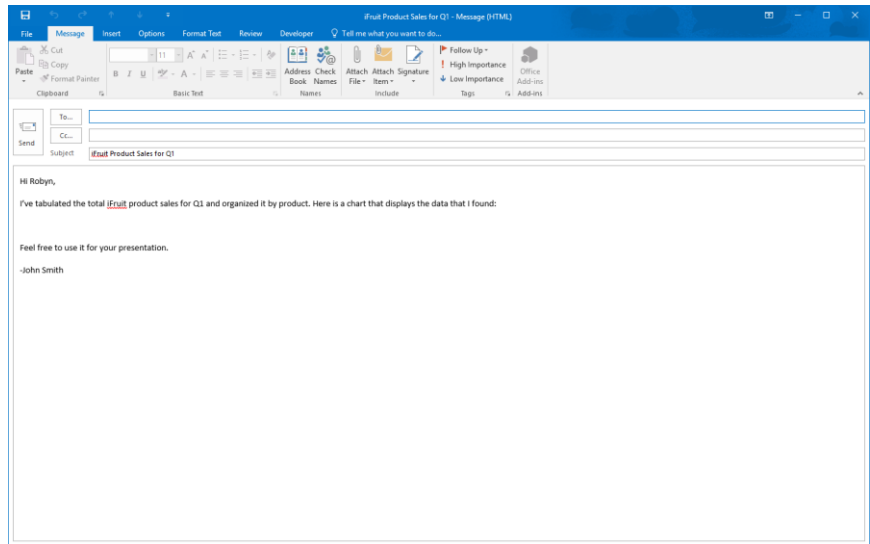
AutoText works under a similar premise, but allows you to create and reuse frequently added phrases. These phrases are added to the AutoText gallery which you can then use to insert saved phrases into an e-mail.

ACTIVITY 1-1

Inserting Advanced Characters and Objects into an Outlook Item

You need to send an e-mail to one of the sales executives in your company. While this e-mail is almost done, you need to add some special objects to make sure that the recipient has all of the information that they need.

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



2. First you need to insert a registered trademark symbol (®) after “iFruit” in the body of the message. Click to place your cursor in this location:

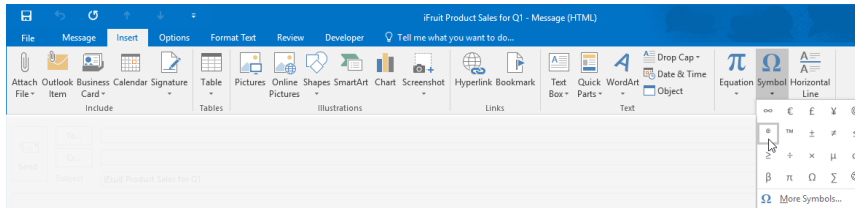
Hi Robyn,

I've tabulated the total iFruit product sales for Q1 and organized it by product. Here is a chart that displays the data that I found:

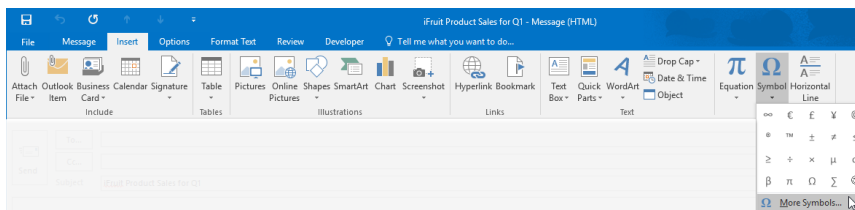
Feel free to use it for your presentation.

-John Smith

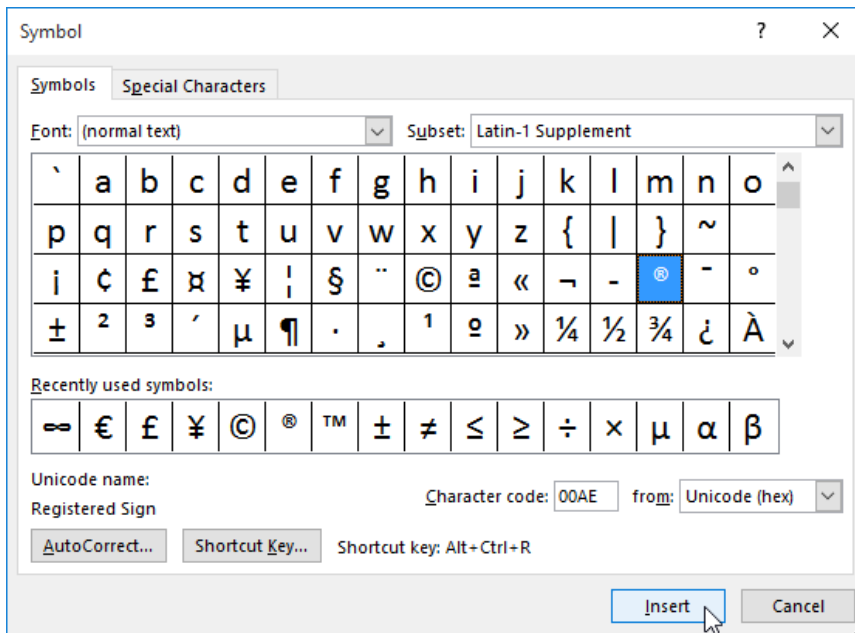
3. Click Insert → Symbol. If you see the registered trademark symbol listed in the drop-down menu, click it and skip to Step Six:



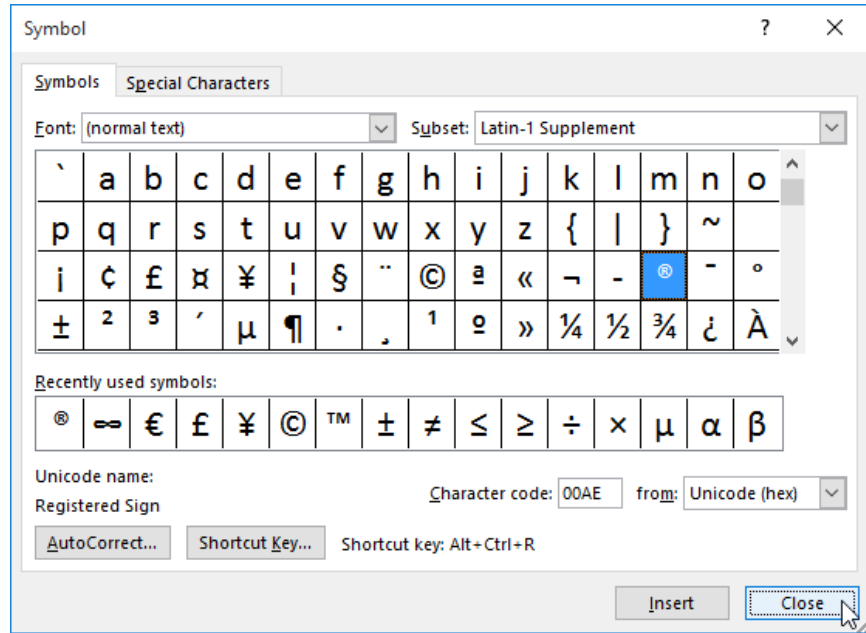
Otherwise, click the More Symbols option:



4. The Symbol dialog box will now be displayed. Scroll through the main gallery in this dialog box to find the registered trademark symbol and click to select it. Click Insert:



With the symbol now inserted into your message, close the Symbol dialog box:



5. Back at the message, you will now see the symbol in the location where your cursor was last placed:

Hi Robyn,
I've tabulated the total iFruit® product sales for Q1 and organized it by product. Here is a chart that displays the data that I found:

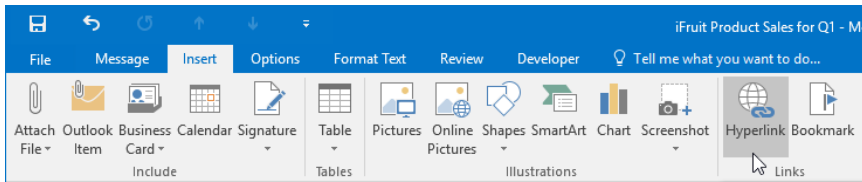
Feel free to use it for your presentation.
-John Smith

6. Next, you need to add a link to the product manufacturer's website. Use your cursor to select "iFruit" in the body of the message:

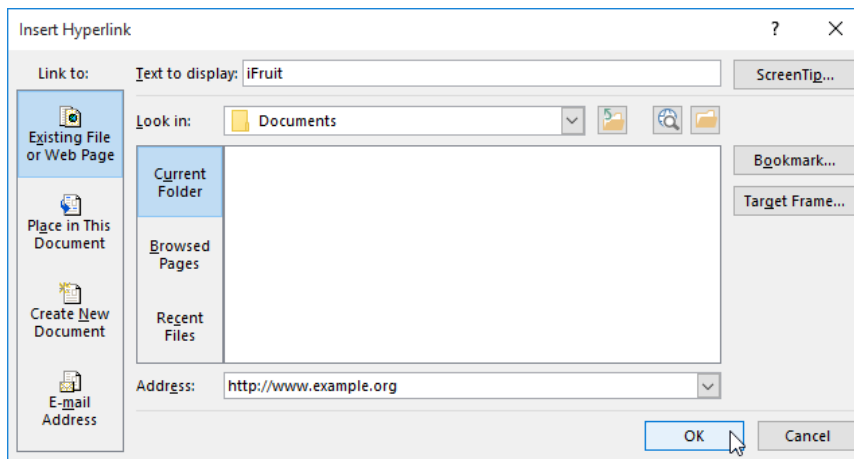
Hi Robyn,
I've tabulated the total iFruit® product sales for Q1 and organized it by product. Here is a chart that displays the data that I found:

Feel free to use it for your presentation.
-John Smith

7. Click Insert → Hyperlink:



8. The Insert Hyperlink dialog box will now be displayed. Ensure that the “Existing File or Web Page” option is selected in the “Link to” section on the left-hand side of the dialog box. Type “http://www.example.org” into the Address text box. Click OK:



9. Returning to the message, you will see that the previously selected text is now a hyperlink:

Hi Robyn,

I've tabulated the total [iFruit](http://www.example.org) product sales for Q1 and organized it by product. Here is a chart that displays the data that I found:

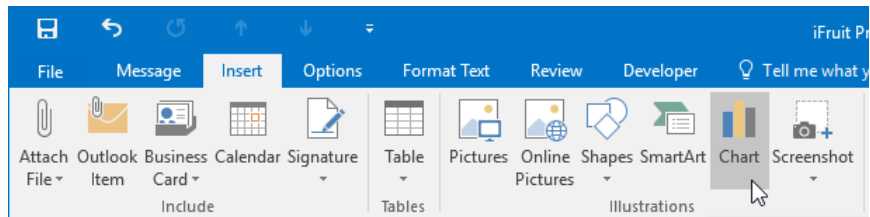
Feel free to use it for your presentation.

-John Smith

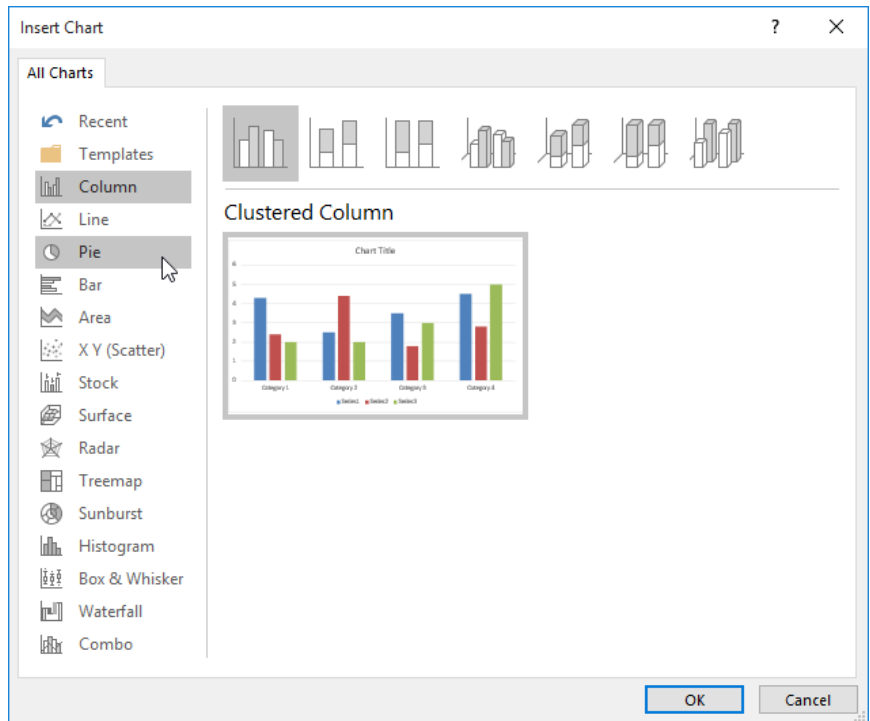
10. Finally, you need to add a chart to this message. Click in between the two middle lines of existing text in the message:

Hi Robyn,
I've tabulated the total [iFruit®](#) product sales for Q1 and organized it by product. Here is a chart that displays the data that I found:
| | ←
Feel free to use it for your presentation.
-John Smith

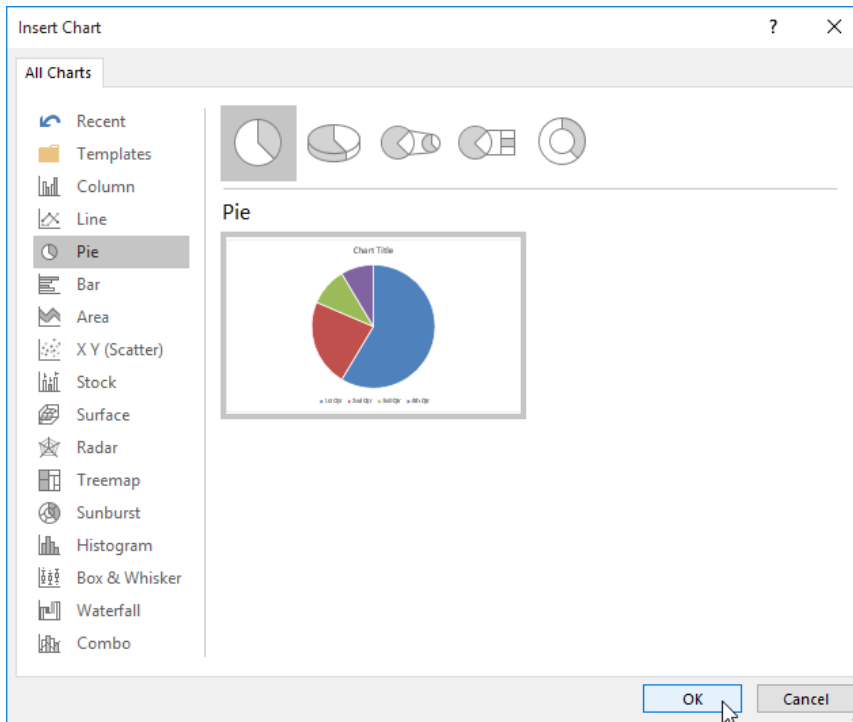
11. Next, click Insert → Chart:



12. The Insert Chart dialog box will now be displayed. In the section on the left-hand side of this dialog box, click the Pie chart type:



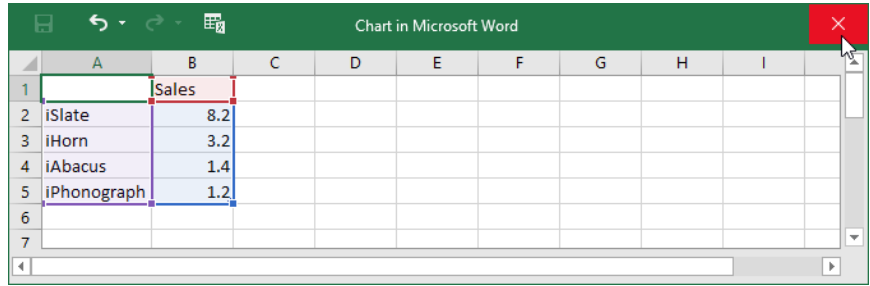
13. With the default pie chart style selected, click OK:



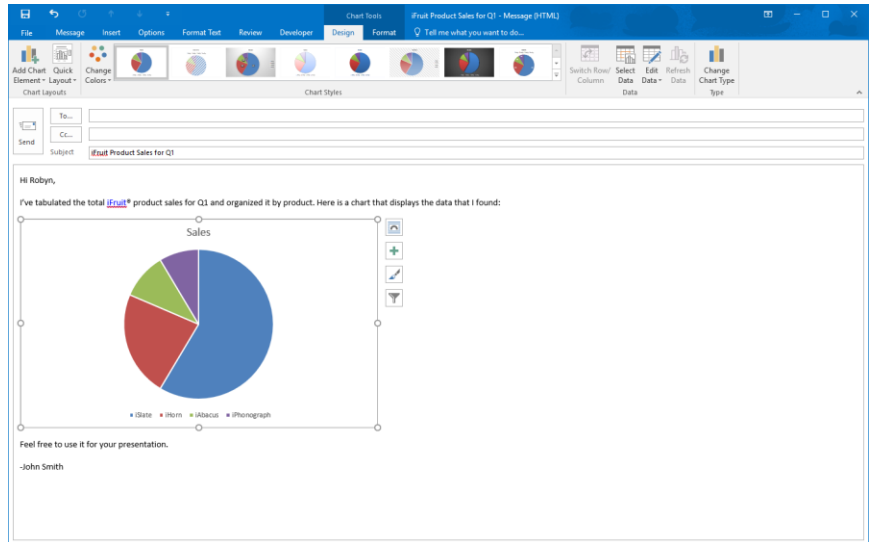
14. The chart will be inserted into your message where your cursor was last placed and a new spreadsheet will open in a small Excel window that is populated with some sample data. For this example, the sample data points can remain unchanged. Rename the data names to match the following image by typing directly into the cells:

	A	B	C	D	E	F	G	H	I
1		Sales							
2	iSlate	8.2							
3	iHorn	3.2							
4	iAbacus	1.4							
5	iPhonograph	1.2							
6									
7									

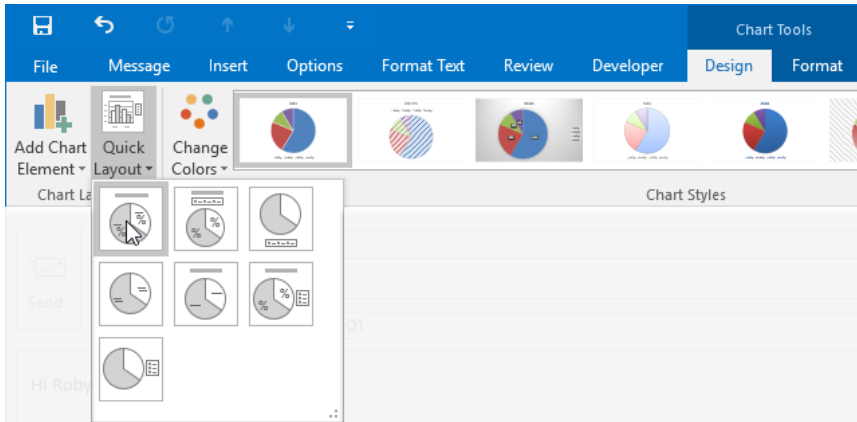
15. Close the Excel window:



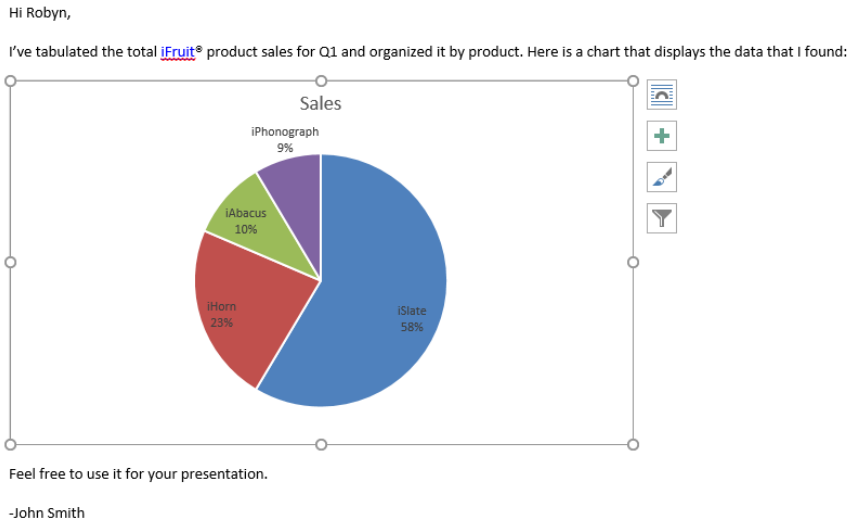
16. Returning to the message, you will see that the new chart has been inserted where your cursor was last placed. Additionally, the Chart Tools contextual tabs are displayed on the ribbon:



- 17. While the chart already looks pretty good, you would like to use a new layout. Click Chart Tools – Design → Quick Layout → Layout 1:



- 18. The chart will now have changed to incorporate the new layout which displays percentage values:



- 19. Enter a classmate’s e-mail address into the To field and click Send. Or, save your message as Activity 1-1 Complete. Close Microsoft Outlook 2016 to complete this activity.

TOPIC B: Modify Message Settings, Properties, and Options

Outlook 2016 includes dozens of different message settings and options that change how it works in just about every way that you can think of. While the default configuration is suitable for many, if not most, situations, it is important to know the full range of message options that Outlook has to offer.

Topic Objectives

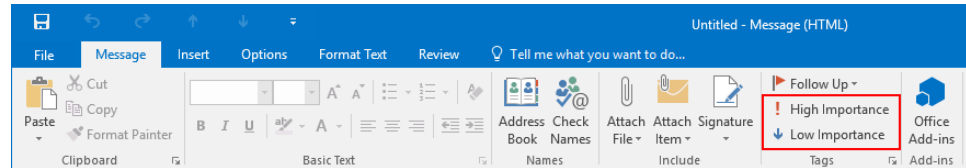
In this topic, you will learn:

- About importance levels
- About sensitivity levels
- How to use multiple e-mail accounts
- About the From option
- About the Bcc and From fields
- How to save sent messages to another folder
- How to re-direct replies
- About delivery options
- About language options
- About advanced options

IMPORTANCE LEVELS

Importance levels can be assigned to messages that you send out so that recipients will be able to quickly understand if the message content needs to be addressed as soon as possible or if it can be left to a later time.

When applying importance levels to a message, it is important to know that there are three levels to choose from: **low**, **normal**, and **high**. Each message that you send out will automatically be set to the normal importance level. If you would like to assign either a low or high importance level, you can do this by clicking one of those options in the Tags group of the Message tab while composing a message:



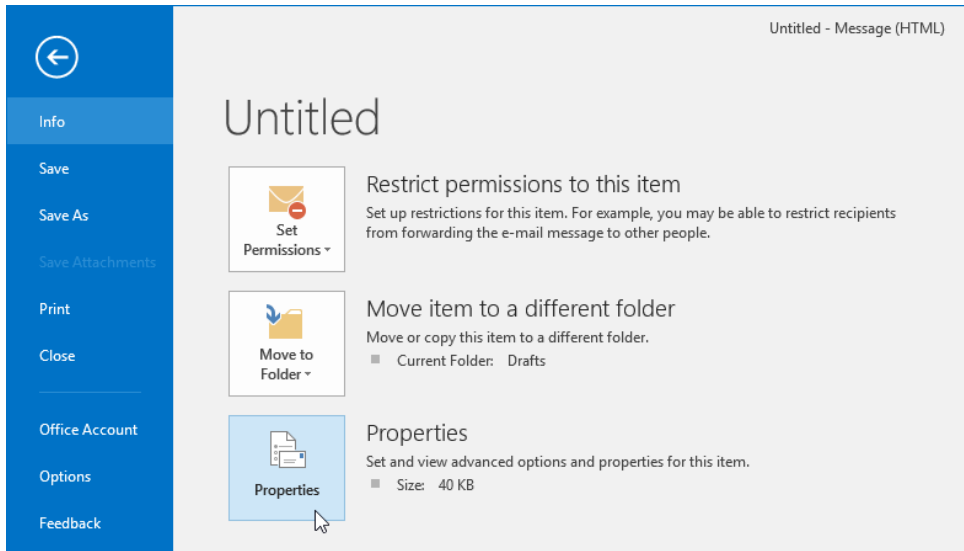
Once either of those options is selected, the selected command will appear shaded in. The recipient will see the applicable message icon representing the importance level next to the message when it appears in their inbox.

SENSITIVITY LEVELS

A somewhat similar feature is **sensitivity levels**. By applying a sensitivity level to a message, you can help ensure that any recipients of your message will understand how sensitive the contents of your message are and act accordingly.

Outlook 2016 supports four different sensitivity levels: **normal**, **personal**, **private**, and **confidential**. Every message that you send will automatically be assigned the normal sensitivity level.

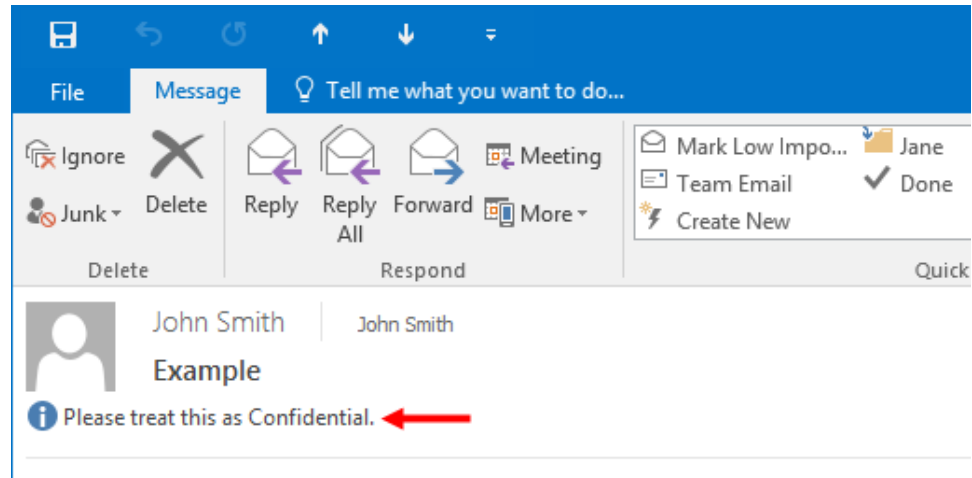
If you would like to assign a different sensitivity level, open the Properties dialog for the message that you are composing by clicking File → Info → Properties:



With the Properties dialog box displayed, click Sensitivity → [Sensitivity Level]:



Once you have applied a sensitivity level other than normal to a message and send it, the recipient will see text just below the subject that describes the selected sensitivity level:



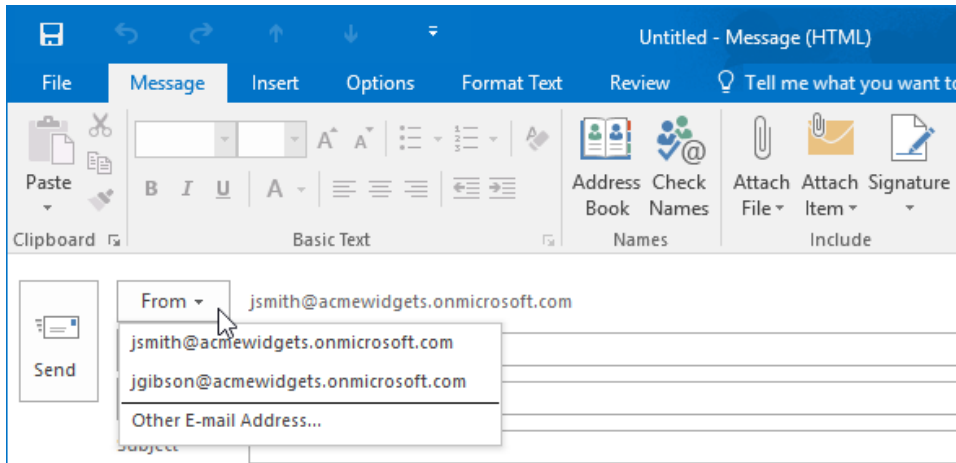
Note that sensitivity levels are only intended to advise recipients of sensitive content in a message. It does not, in any way, prevent recipients from acting against the interests of a selected sensitivity level.

MULTIPLE E-MAIL ACCOUNTS

Outlook 2016 can support up to ten different e-mail accounts at the same time. As any accounts that you add to Outlook 2016 use the same interface, you will be able to send and respond to items from any account that you have connected to in Outlook.

THE FROM OPTION

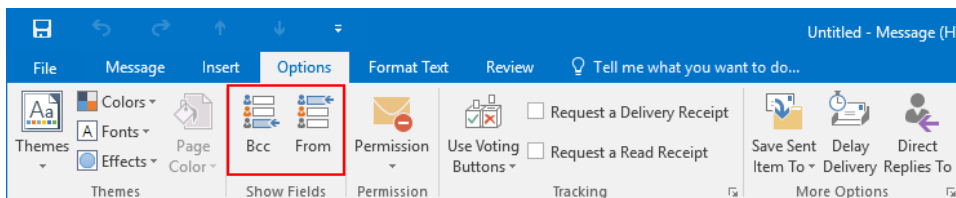
When you have configured Outlook 2016 to work with multiple accounts, you will have the option to send, respond, and forward messages using any of those accounts. The original account that was used to set up Outlook will be chosen by default as the sending account. However you can choose another account by clicking the From field when composing an item:



This drop-down menu will list any accounts have been configured with your installation of Outlook. Click on any of these options to use them.

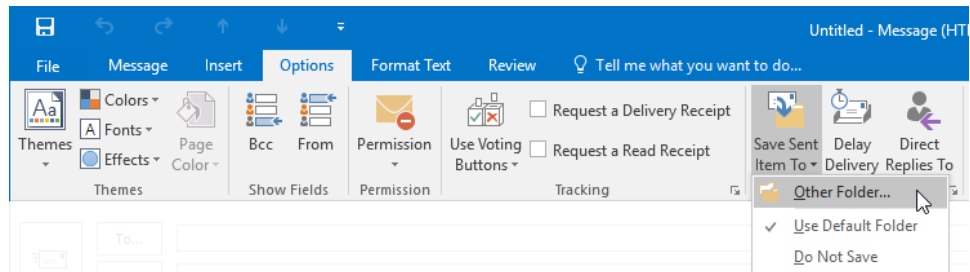
THE BCC AND FROM FIELDS

You can toggle the display of the From field, as well as the Bcc field, using the commands in the Show Fields group of the Options tab when you are composing a new message:

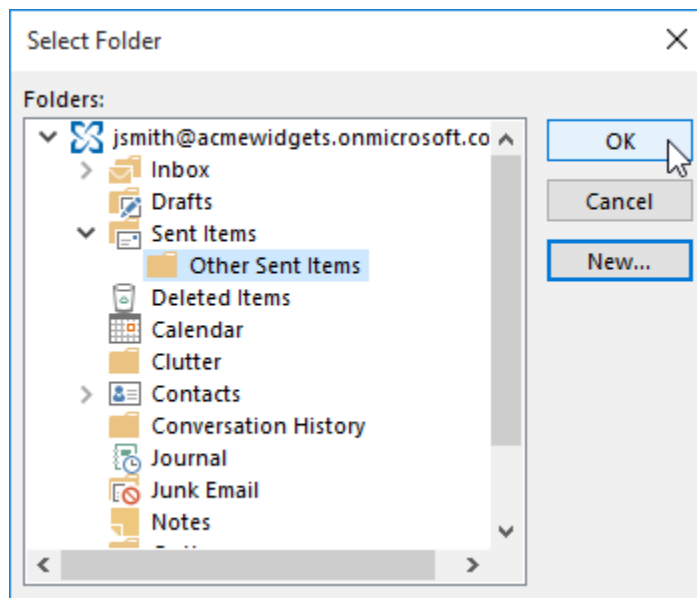


SAVING SENT MESSAGES TO ANOTHER FOLDER

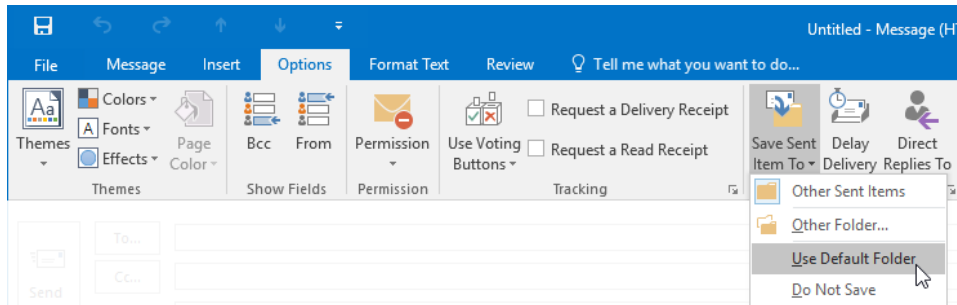
While any messages that you send are automatically saved to the Sent Items folder, you do have the option to choose another folder instead. To do this, click Options → Save Sent Item To → Other Folder:



Using the controls in the Select Folder dialog box, you can choose the folder that you want the message saved in:



This folder will be saved in the Save Sent Item To drop-down list for easy access later on. If you change your mind later, click Save Sent Item To → Use Default Folder:

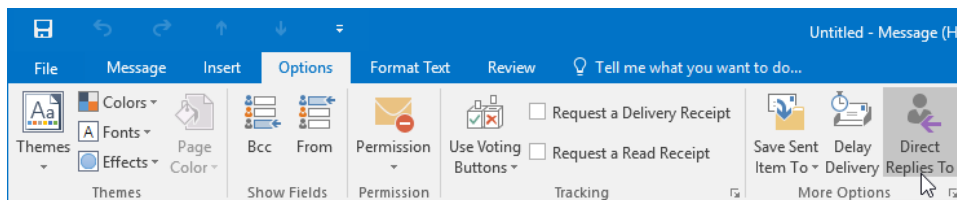


Note that you can also choose Do Not Save to eliminate the process of saving sent messages altogether.

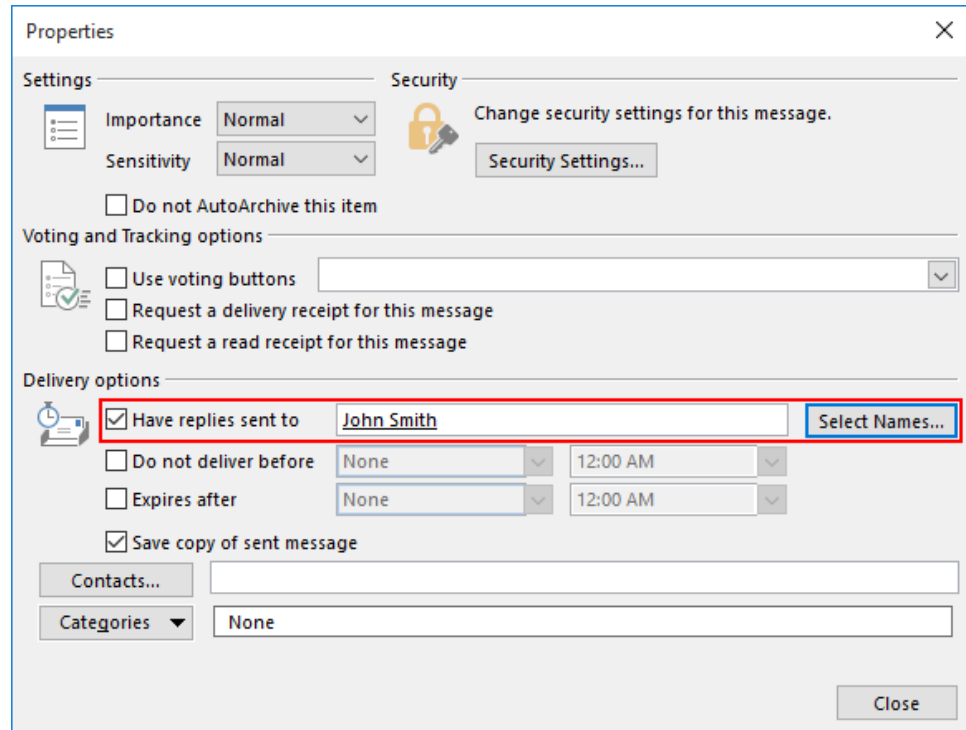
RE-DIRECTING REPLIES

In Outlook 2016 you will also find the option to re-direct replies sent in a response to a message that you send out, to another e-mail address. For example, if you wanted to send out a notice to collect sign-ups for an event, you could use this feature have all replies sent to another organizer's account.

To re-direct replies, click Options → Direct Replies To:



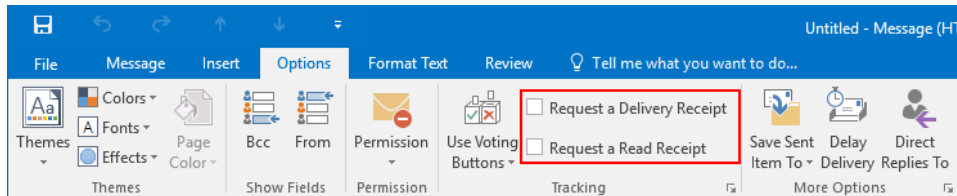
This action will display the Properties dialog box. In the “Delivery options” section, you will see that the “Have replies sent to” check box has been checked:



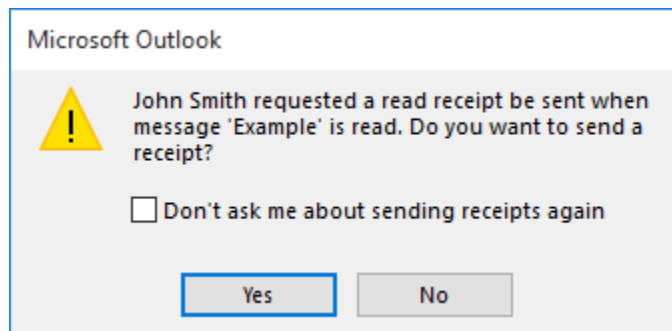
Inside the adjacent text box you will see your own e-mail address (or name) listed. You can replace your e-mail address with the e-mail address of the person that you want direct replies sent to. Alternatively, you can click the Select Name button to open your Address Book and choose a name from there.

DELIVERY OPTIONS

Outlook 2016 includes delivery options that can be used to let you know if someone has received or opened a message that you sent to them. Inside the Tracking group of the Options tab, you can check either of these options to be notified when the recipient has opened the e-mail (for delivery receipts) or read it (for read receipts):

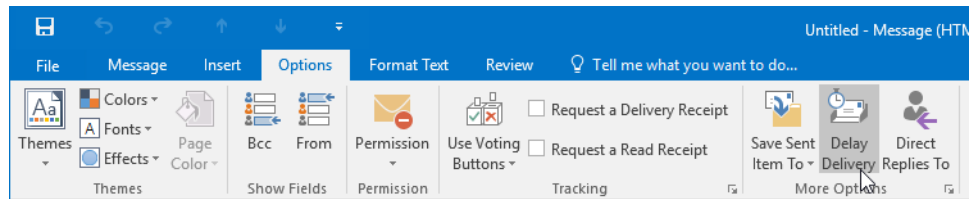


For **delivery receipts**, you will receive a confirmation e-mail when the message has been successfully delivered. When the recipient opens a message with a **read receipt**, they will be prompted to confirm whether or not they want to send confirmation that the message has been read:

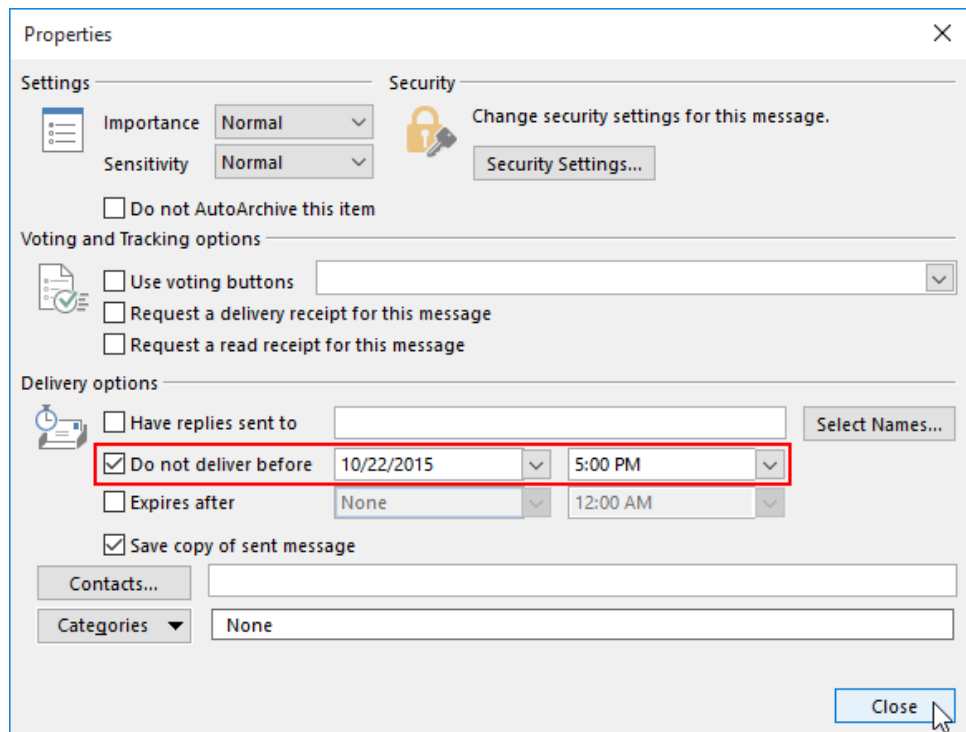


If the recipient clicks Yes, the sender will receive an e-mail that confirms to them that the message was read.

You also have the option to automatically send an outgoing message at a later time. To do this, click Options → Delay Delivery:



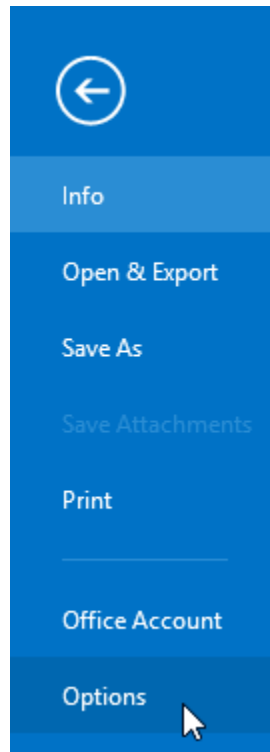
With the Properties dialog box open, choose the date and time that you would like the message to be sent. Then, click Close:



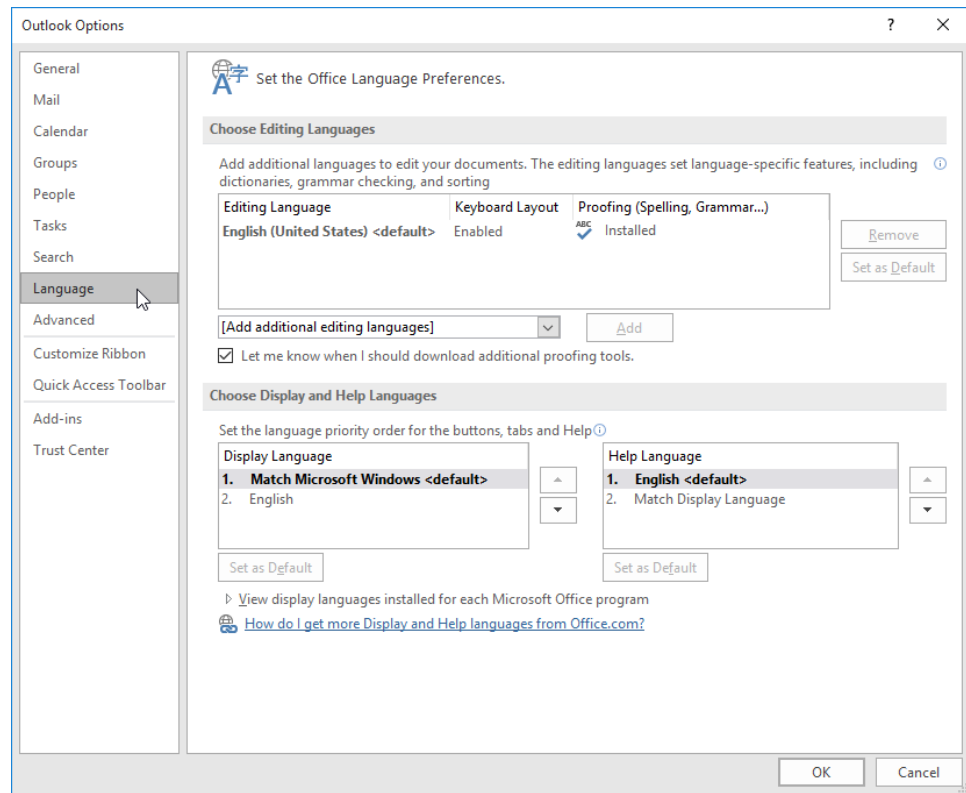
When this feature is enabled, the Delay Delivery command will appear shaded in on the ribbon. Clicking the Send button will store the message in the outbox until the designated time is reached.

LANGUAGE OPTIONS

To modify the language options for Outlook 2016, click File → Options to open the Outlook Options dialog box:



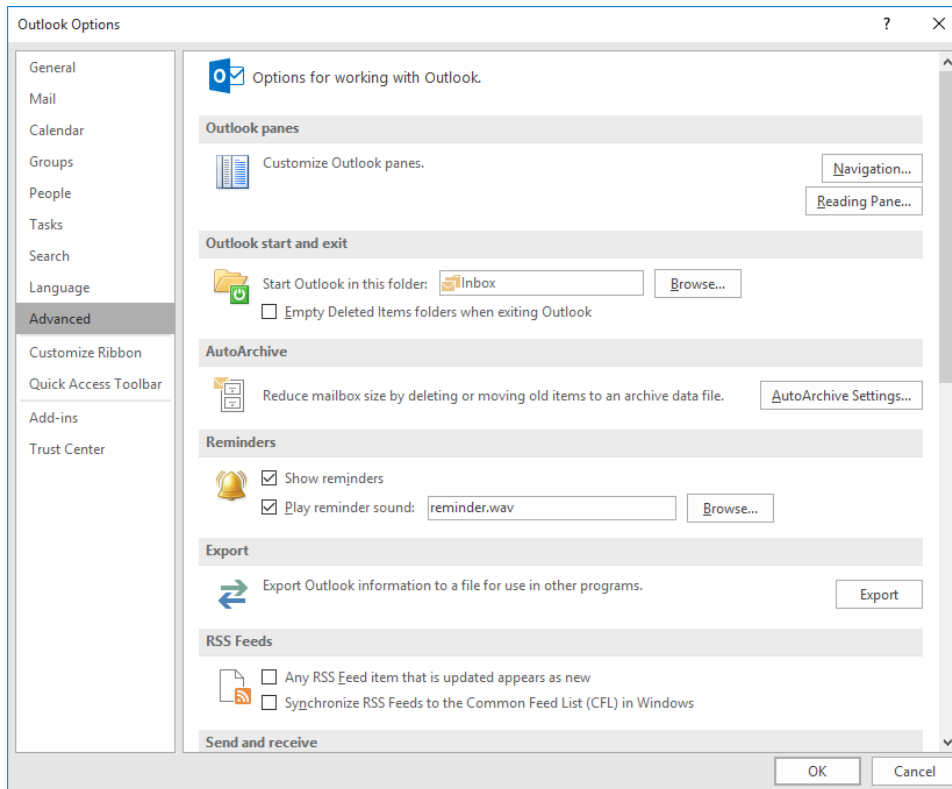
Then, select the Language category:



Here, you are able to select the default language that is used when composing and editing messages. You are also able to choose which language is used by the Outlook 2016 interface itself, including help files, ScreenTips, and more.

ADVANCED OPTIONS

Also in the Outlook Options dialog is the Advanced category. This category includes controls that allow you to configure some of the more advanced settings in Outlook 2016:



Here is an overview of each section of this category.

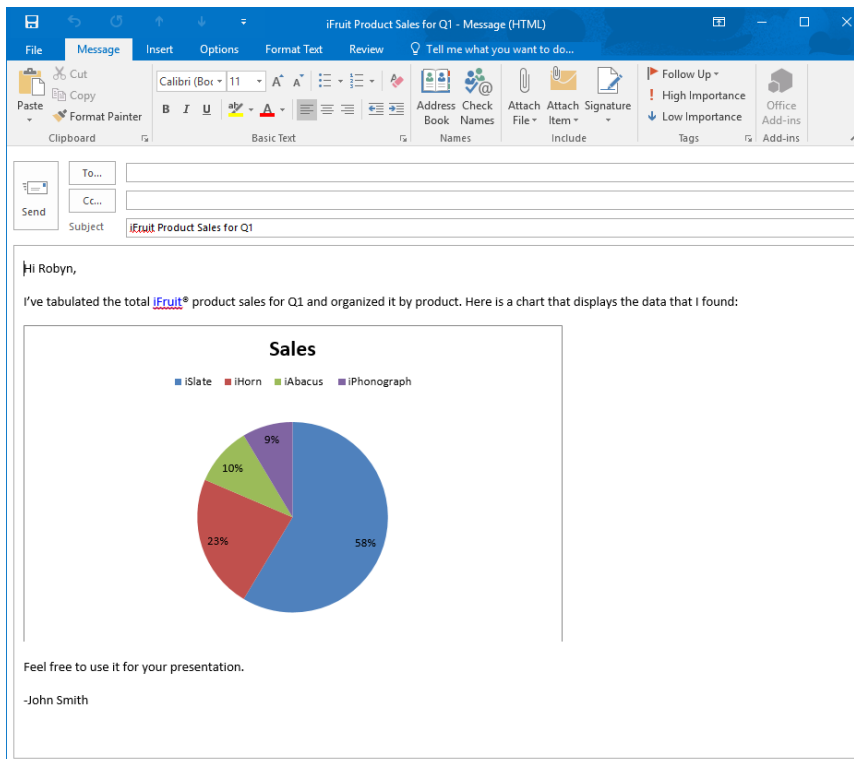
- **Outlook panes:** Customize how the Navigation pane, Reading pane, and To-Do Bar all appear and behave. This includes choosing which elements they display.
- **Outlook start and exit:** The controls in this section are used to choose which folder you would like to be displayed by default when Outlook is started. Additionally, you also have the option to automatically empty the Deleted Items folder when Outlook is closed.
- **AutoArchive:** Modify the settings that control the AutoArchive feature.
- **Reminders:** Toggle the reminders feature, as well as choose what the reminder sound is.
- **Export:** The command in this section is used to export data from Outlook to a file that can then be used in other programs.
- **RSS Feeds:** Choose how RSS feeds are updated and synchronized.
- **Send and receive:** Customize how messages are sent and received by Outlook.
- **Developers:** Configure options for custom forms.
- **International options:** Customize language, encoding, and other options when working with international accounts.
- **Display:** Toggle hardware graphics acceleration.
- **Other:** A collection of miscellaneous settings that control everything from notifying you when permanently deleting a message, to toggling animations on or off.

ACTIVITY 1-2

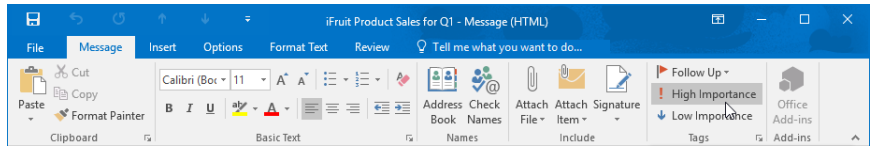
Modifying Message Settings, Properties, and Options

You are sending some important sales data that should not be shared with people outside of your organization. Additionally, the recipient has asked you not to send this message immediately, but only when they get back from vacation next Thursday.

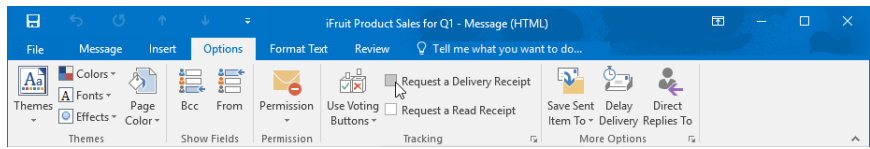
1. To begin, open Outlook 2016. Within your Exercise Files folder, double-click the Activity 1-2.msg file to open it. This message will be displayed in a separate Outlook window:



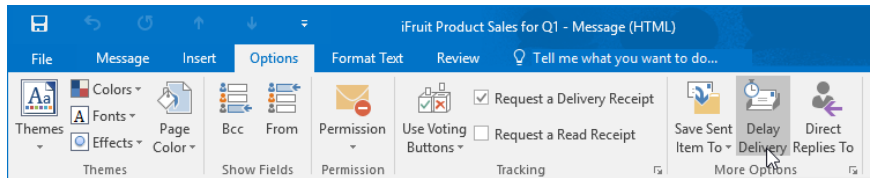
2. First, you should mark this message as important so that the recipient does not miss it. Click Message → High Importance:



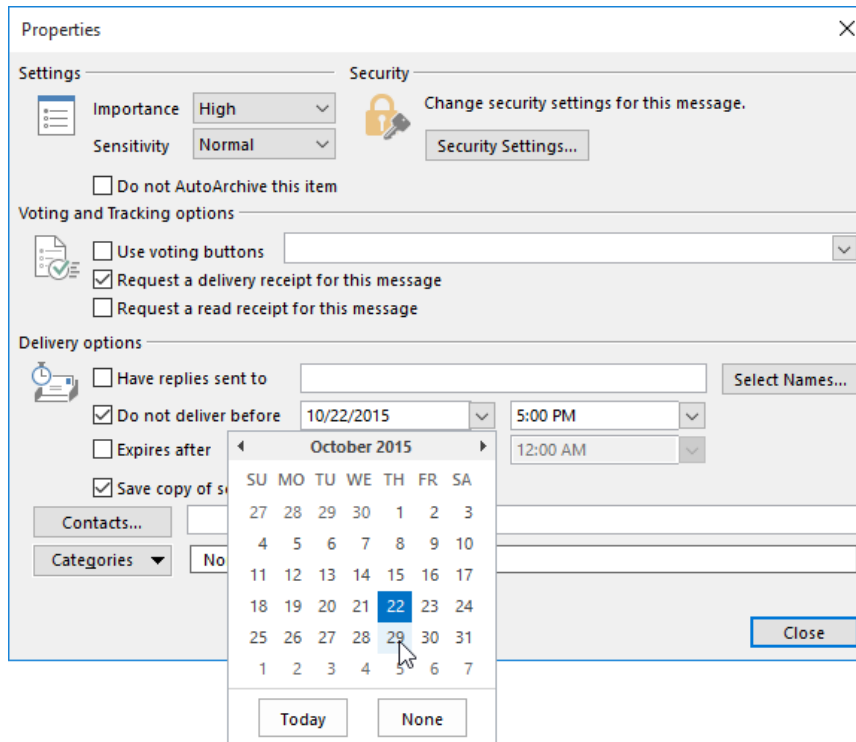
3. Next, you would like to ensure that the message is delivered. Click Options → Request a Delivery Receipt:



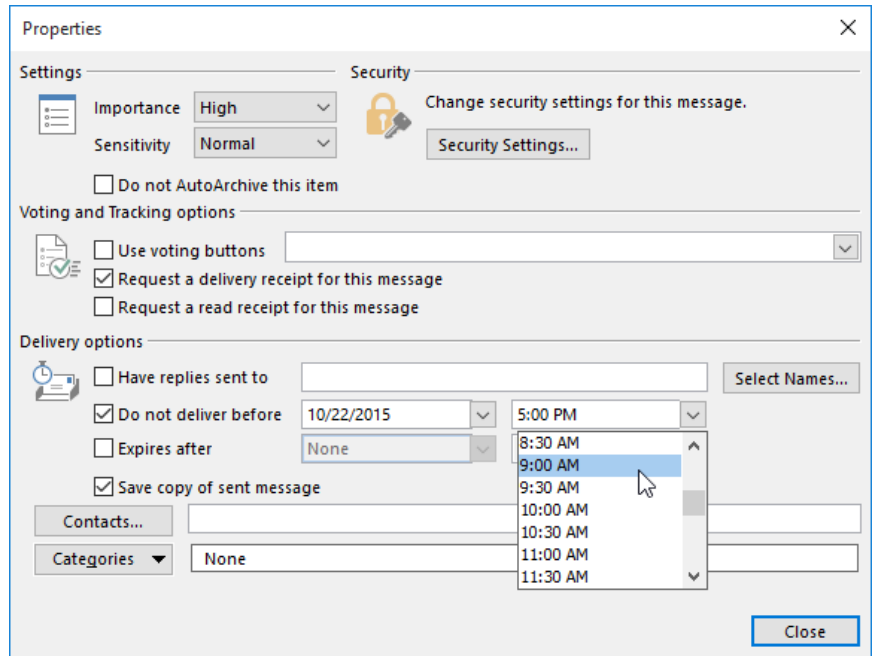
4. Now you need to delay the delivery to next Thursday. Click Options → Delay Delivery:



5. This action will display the Properties dialog box. Ensure that the “Do not deliver before” checkbox in the “Delivery options” section is checked. Click the adjacent date picker and choose Thursday of next week:



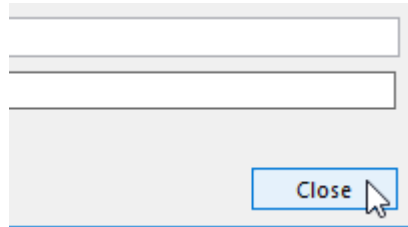
6. Change the adjacent time picker to 9:00 AM:



7. Now you need to pick a new sensitivity level. Click the Sensitivity drop-down menu and choose Confidential:



8. Click Close to apply the new settings:



9. Enter a classmate's e-mail address into the To field and click Send.
Or, save your message as Activity 1-2 Complete. Close Microsoft Outlook 2016 to complete this activity.

TOPIC C: Use Automatic Replies

If you go away on vacation or are otherwise unable to respond to any e-mail messages for significant length of time, you are able to configure Outlook to send an automatic reply on your behalf to anyone that sends you a message. Over the course of this topic, you will learn how to use and customize automatic replies.

Topic Objectives

In this topic, you will learn:

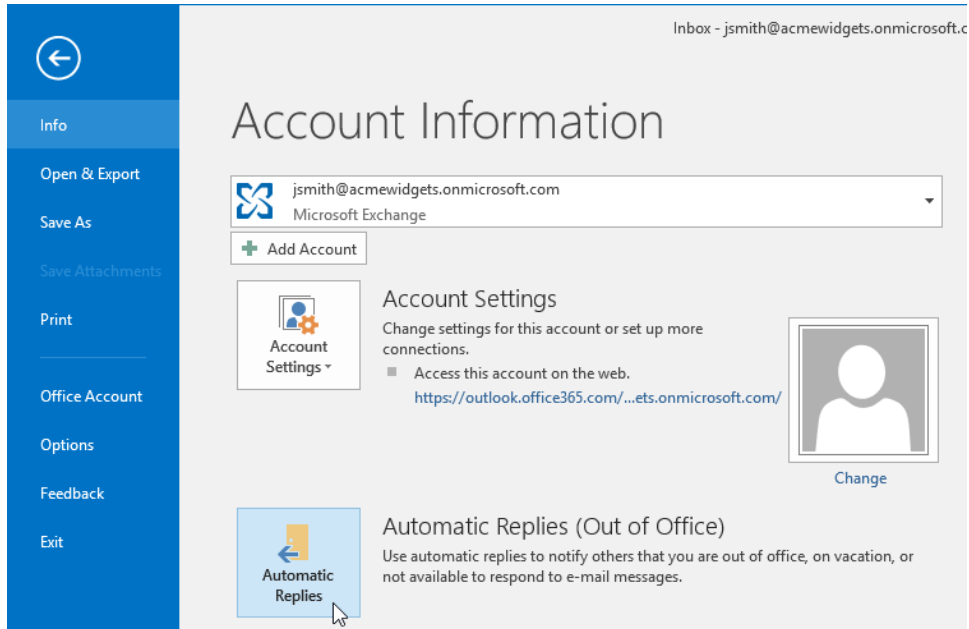
- About automatic replies
- About the Automatic Replies dialog box
- How to create and manage rules
- About automatic reply rules

AUTOMATIC REPLIES

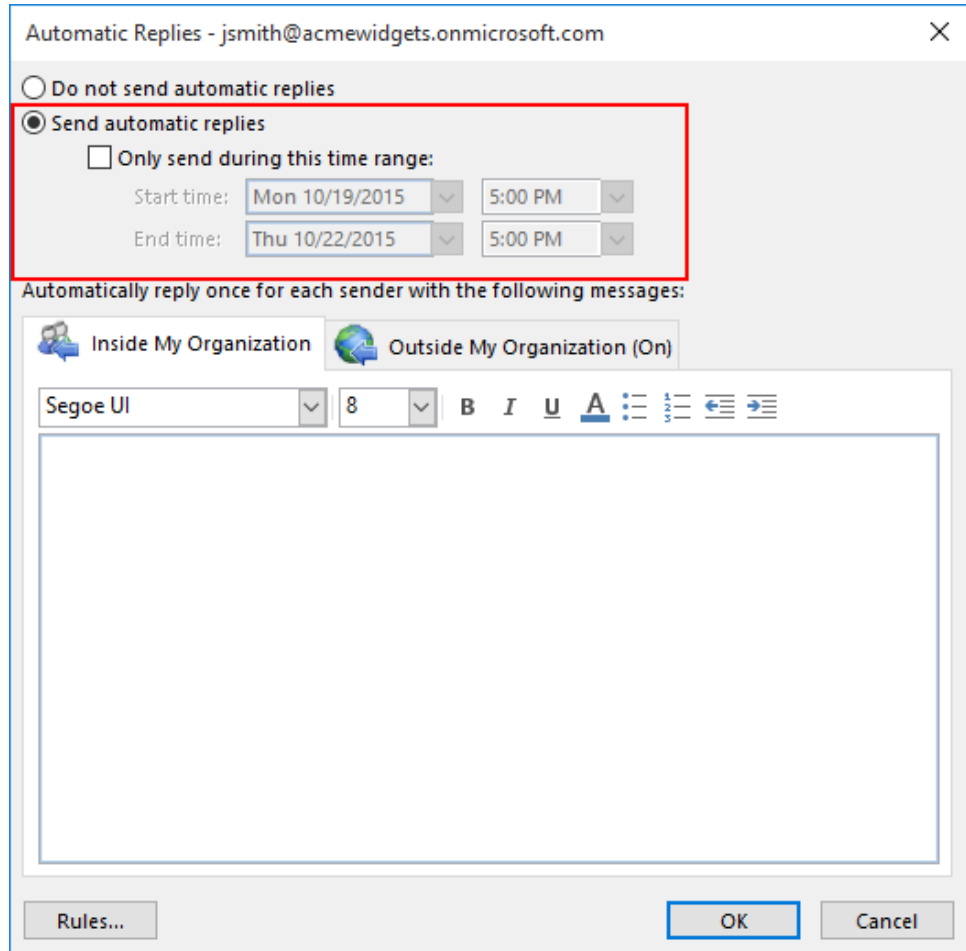
Automatic replies (sometimes referred to as “out-of-office replies”) are used to automatically reply to any message that you receive during a specified period. Typically this feature is most often used when you are on vacation or otherwise unable to respond to any incoming messages for a significant period of time. The messages that are sent out by this feature are fully customizable and are generally used to inform the sender about your absence and when you expect to be able to reply.

THE AUTOMATIC REPLIES DIALOG BOX

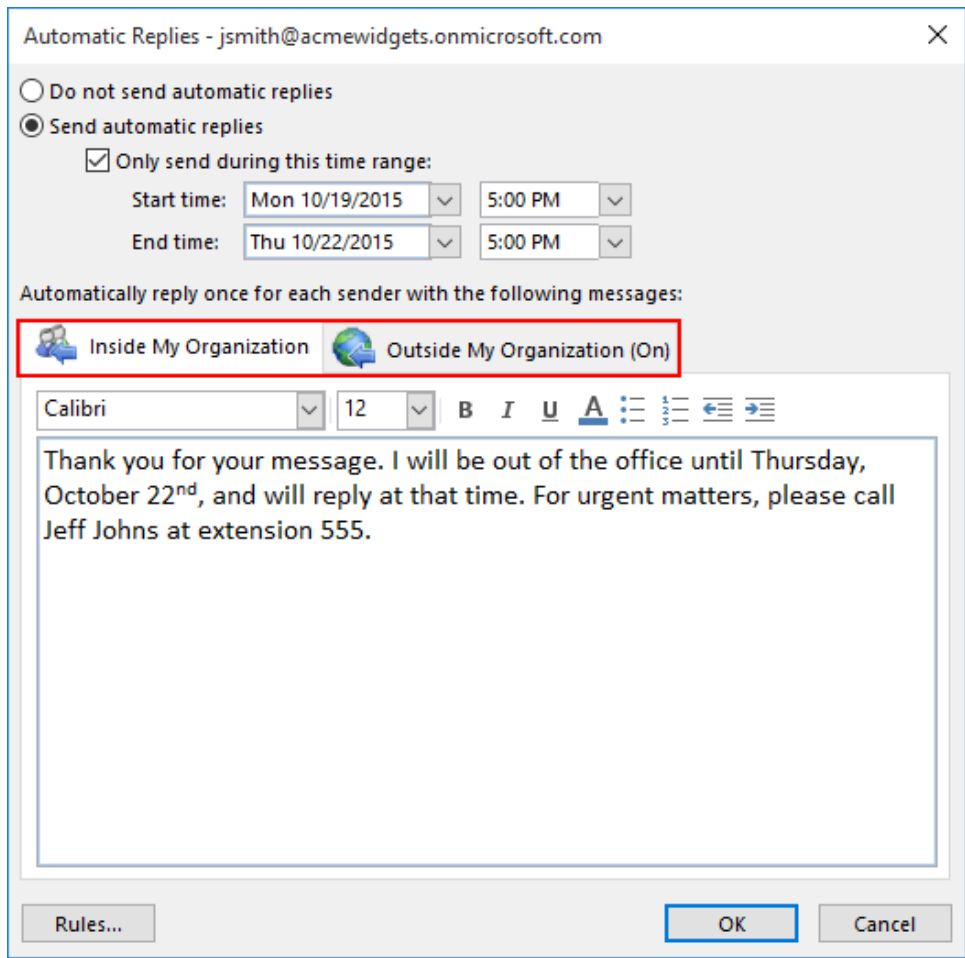
To configure automatic replies, click File → Info → Automatic Replies from the main Outlook window:



With the Automatic Replies dialog box displayed, click the “Send automatic replies” radio button. If you want to choose a specific time frame for when you want automatic replies to be sent, check the “Only send during this time range” check box and use the adjacent controls to choose the start and end times:

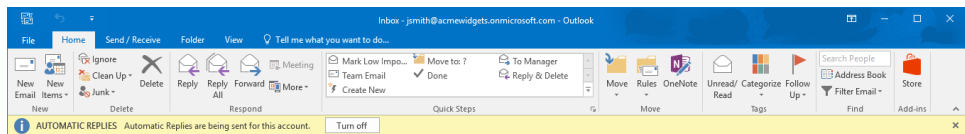


Finally, use the bottom part of the dialog to create your scripted message. Notice how you can create both internal and external messages:



Click OK to apply the settings.

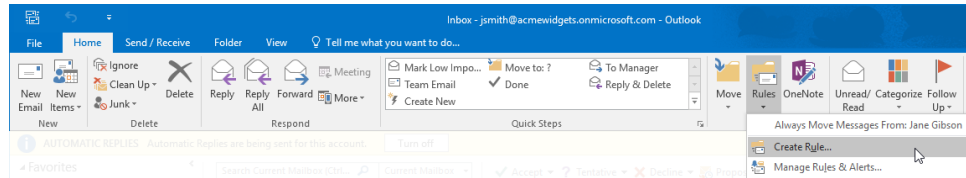
When the automatic replies feature is enabled, you will see a notification in the File menu and in the Message Bar. This notification will provide you with an option to turn off this feature:



CREATING RULES

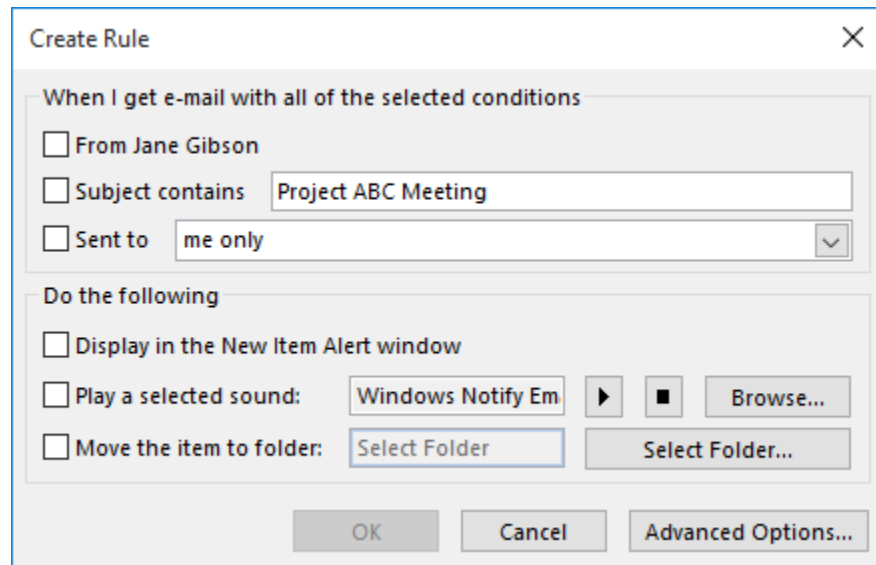
Rules can be configured to move e-mail to a specified location, play a specific sound, or display a New Item Alert window based on the sender, subject, and/or whom it was sent to.

To create a rule, first select a message that you would like to base the rule on. Next, open the Create Rule dialog by clicking Home → Rules → Create Rule:

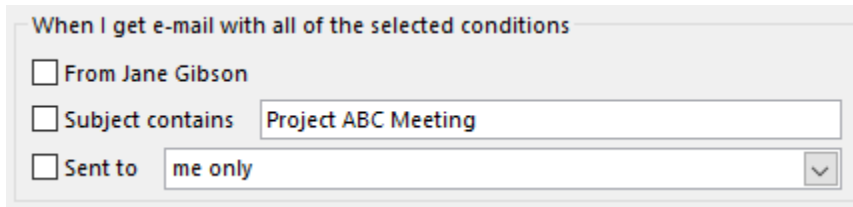


(You can also right-click an e-mail that you would like to base the rule upon and then click Rules → Create Rule.)

Either command sequence will display the Create Rule dialog box:



The first part of the box (“When I get e-mail with all of the selected conditions”) specifies which conditions are required in order for the rule to run:



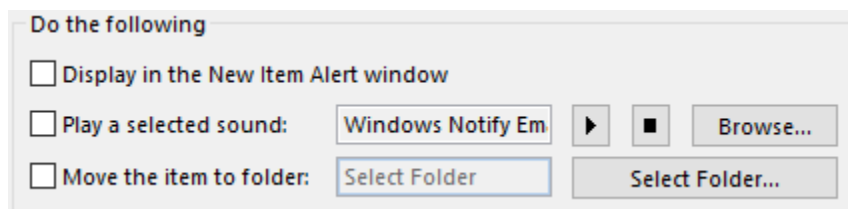
When I get e-mail with all of the selected conditions

- From Jane Gibson
- Subject contains
- Sent to

Here is an overview of these options.

- The **From** checkbox will already include the name of the person who sent the e-mail that you are using to create the rule. When checked, this control will ensure that every e-mail message sent to you by the specified person will be included by the rule.
- The **“Subject contains”** field will automatically be filled in with the subject of the e-mail that you are working with. Unlike the From option, this text box can be edited to anything that you want. Checking the corresponding checkbox will ensure that every e-mail message received by you with the specified subject line will be included by the rule.
- Finally, the **“Sent to”** drop-down menu is used to base the rule that you are creating on whom a message was sent to. This can include a distribution list (a pre-defined group of contacts) or any other recipients of the message that you are working with.

The “Do the following” section in the Create Rule dialog box includes controls that are used to set what actions will happen when the conditions set in the “When I get e-mail with all of the selected conditions” section are met:



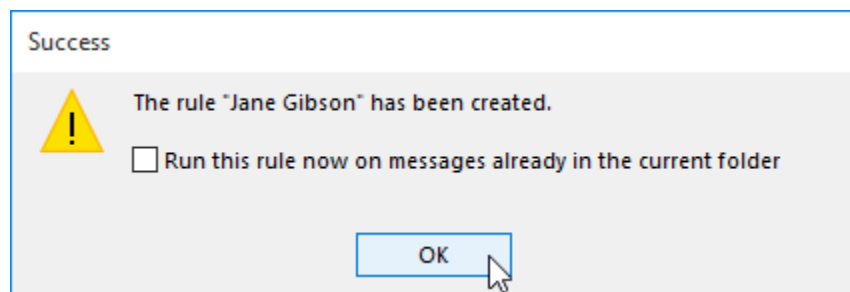
Do the following

- Display in the New Item Alert window
- Play a selected sound: - Move the item to folder:

Here is an overview of these options.

- When the **“Display in the New Item Alert window”** checkbox is checked, a special window will be displayed when an e-mail arrives that meets the conditions.
- Checking the **“Play a selected sound”** checkbox will have a specified sound play when a message arrives that meets the conditions outlined at the top of the Create Rule dialog box. Using the Browse button, you can choose a new and unique sound.
- Finally, checking the **“Move the item to folder”** checkbox will move e-mails that meet conditions you previously configured to a specified folder. Checking this checkbox will display a dialog box that can be used to specify the folder.

Once you have configured the conditions and actions for the rule that you are creating, click the OK button to complete the process. A dialog box will be displayed to notify you that the rule has been created. It will also provide you with an option to run this rule on messages that already exist in the current folder:

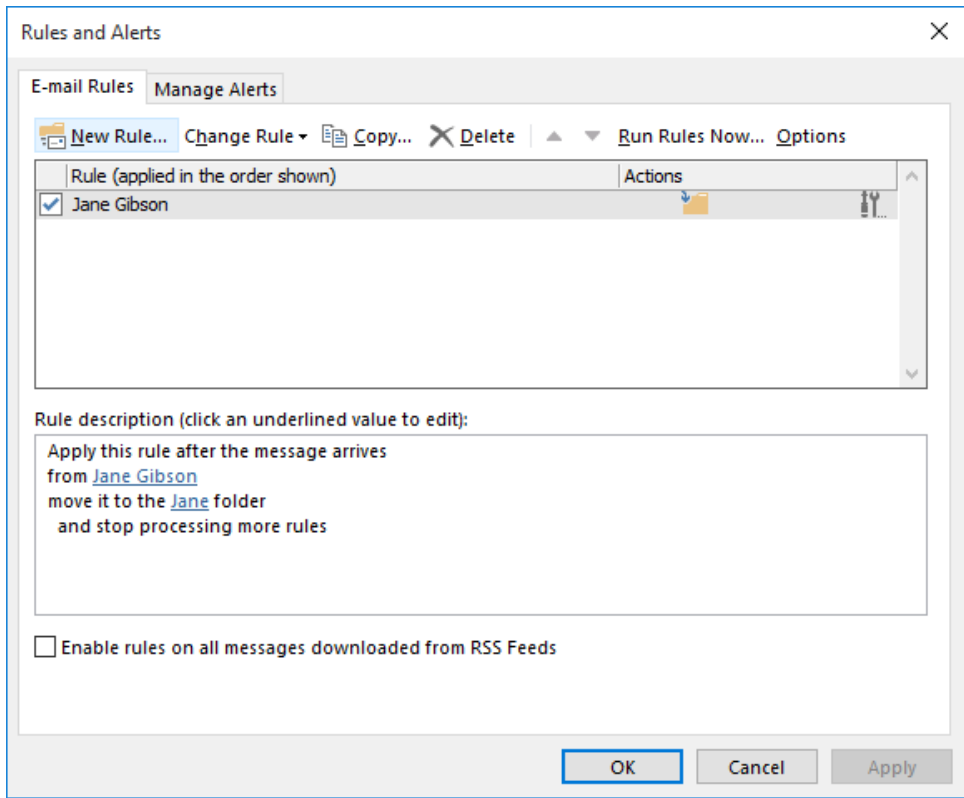


MANAGING RULES

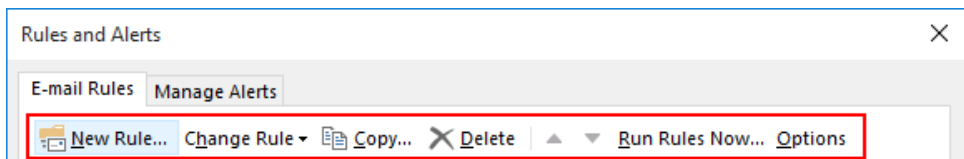
To manage existing rules, you will need to open the Rules and Alerts dialog using one of these command sequences:

- Click Home → Rules → Manage Rules & Alerts
- Right-click an e-mail and click Rules → Manage Rules & Alerts

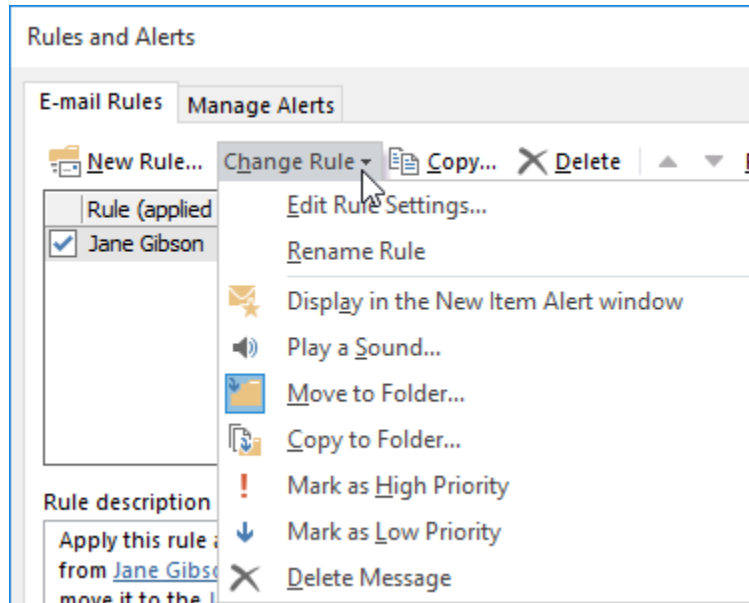
With either of these command sequences, you will then see the Rules and Alerts dialog box open to the E-mail Rules tab:



The toolbar at the top of the dialog gives you options to create a new rule; to change, delete, copy, or move the selected rule; or to run the rule now:

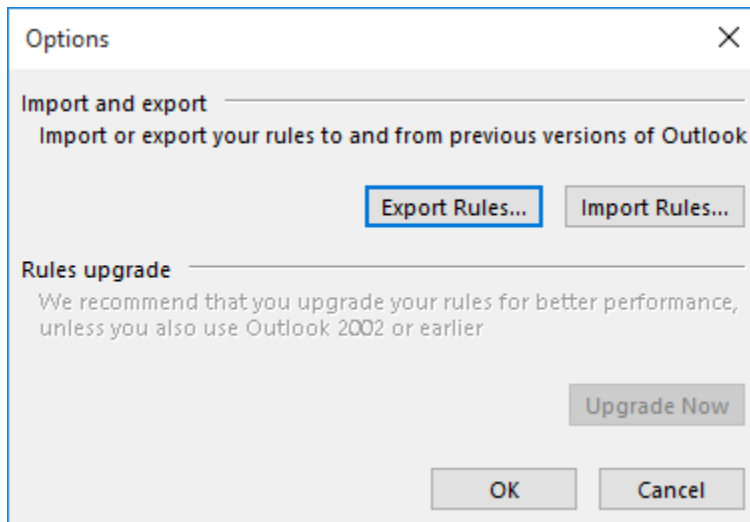


If you're just looking to make a quick change to a rule's action, the Change Rule button is the best way to do it. Clicking this button will display a menu of self-explanatory options:

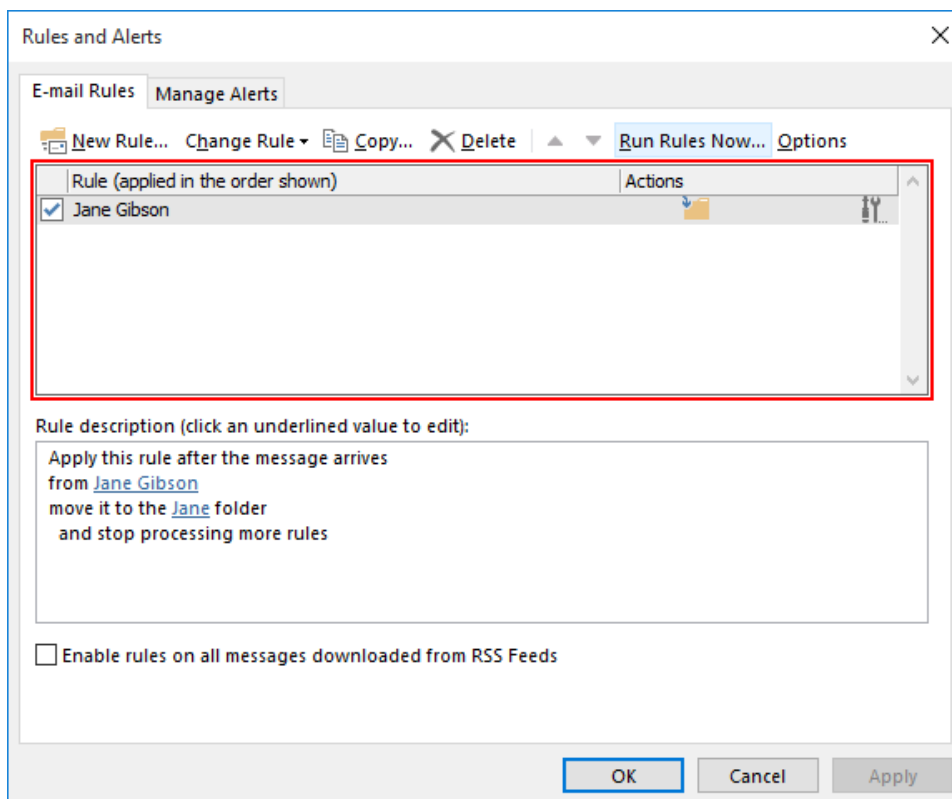


This drop-down menu gives you the option to rename the rule, as well as add or remove different options. The options that are already in use for the rule are highlighted with blue shading (for example, "Move to Folder" in the sample menu above). Clicking on an option that is shaded in will remove that action from the rule, while clicking an unshaded option will add that action to the rule.

Clicking the Options button will display the Options dialog box. This allows you to import, export, or upgrade your rules that were created and used in previous versions of Outlook:

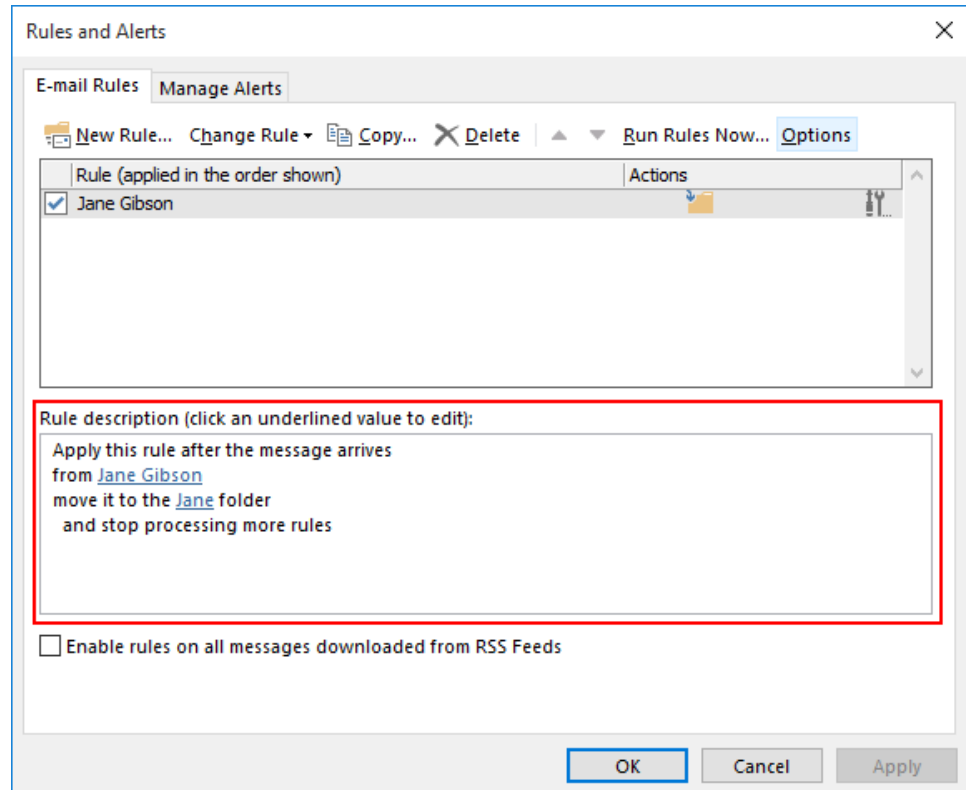


Below the toolbar in the Rules and Alerts dialog box, you will see a list of any existing rules and icons that represent their actions:



There's also a checkbox by the name of each rule. If the box is checked, the rule is on; if the box is unchecked, the rule is off. You can click the checkbox to change this on/off status.

Lower in this dialog box is a section that will provide you with details about the selected rule. For example, here you can see that the selected rule is applied to messages sent by Jane Gibson and it will move them to the Jane folder:

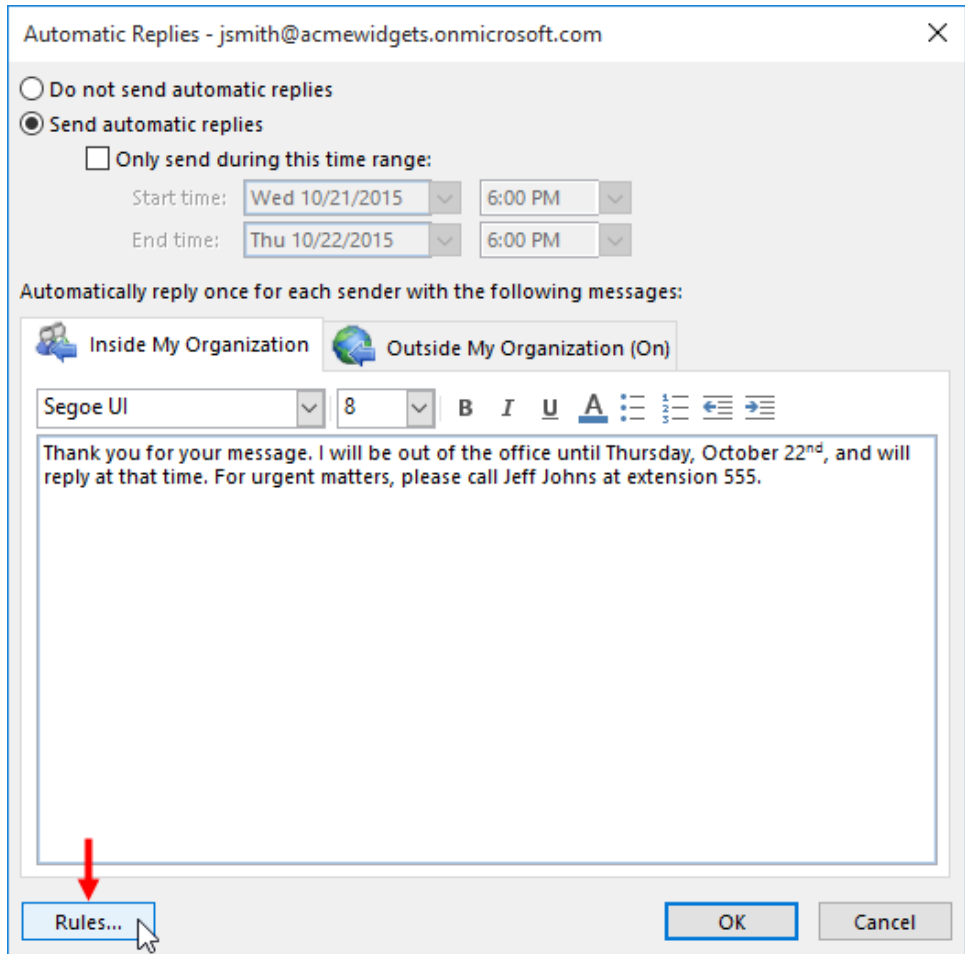


In this section, you can click the parts that are underlined in blue to change that action or value.

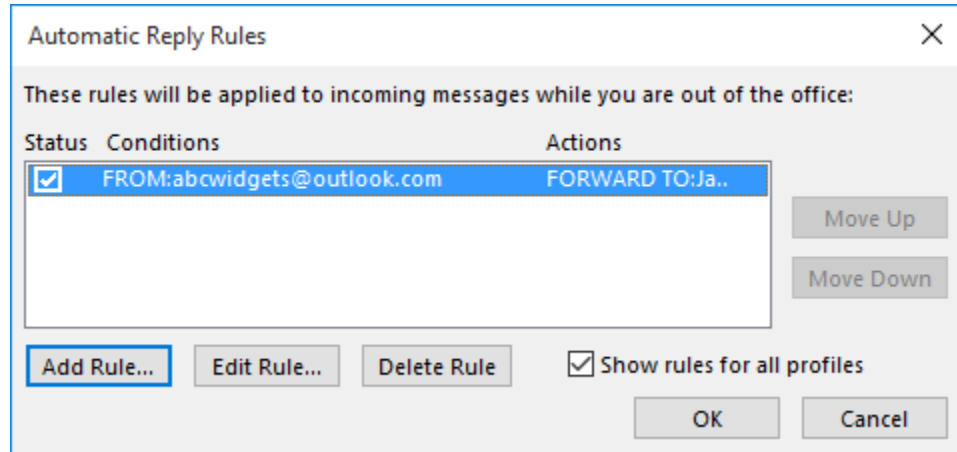
AUTOMATIC REPLY RULES

Aside from the standard rules that are used to manage your mailbox, you can also create rules that work with the automatic reply feature. Such rules can, for example, be used to forward any messages that you receive to someone else while you have automatic reply enabled.

To add or modify automatic reply rules, you first need to open the Automatic Replies dialog box. Then, click the Rules button in the lower left-hand corner:



This action will display the Automatic Reply Rules dialog box. Here, you are able to set actions and conditions for a new rule, much like when creating standard mailbox rules. For example, here you can see a rule that will forward any mail received from abcwidgets@outlook.com to another e-mail address:



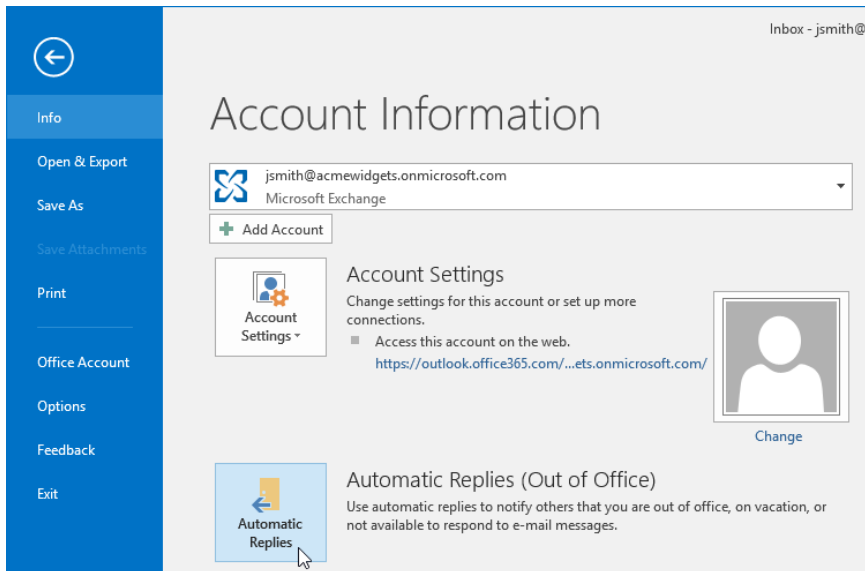
ACTIVITY 1-3

Using Automatic Replies

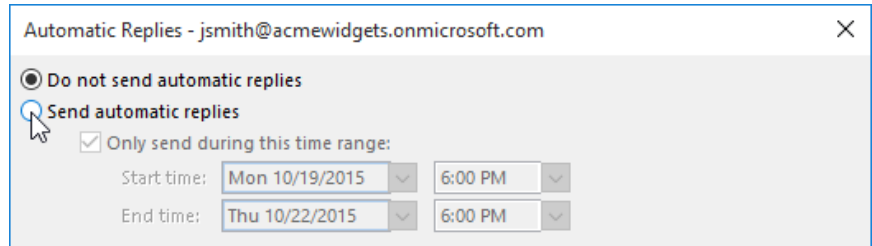
You are going to need to take time off for the next few business days. You would like to use the Automatic Replies feature to notify anyone who sends you an e-mail that you will respond to them when you return.

Students must use Microsoft Exchange Server e-mail accounts in order to complete this exercise.

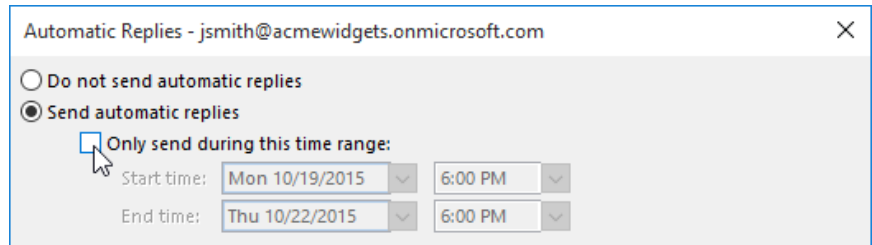
1. To begin, open Outlook 2016.
2. Click File → Info → Automatic Replies:



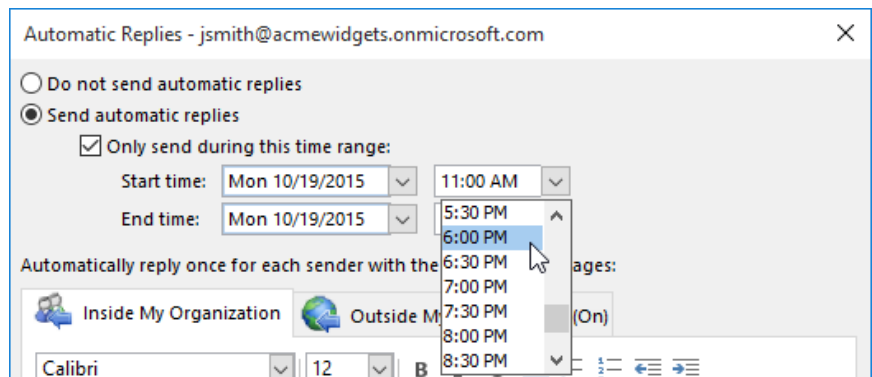
3. The Automatic Replies dialog box will now be displayed. Click the “Send automatic replies” radio button:



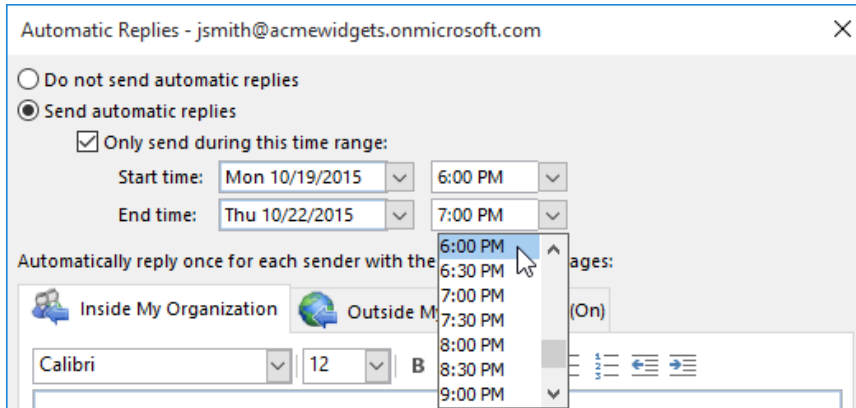
4. Now check the “Only send during this time range” checkbox:



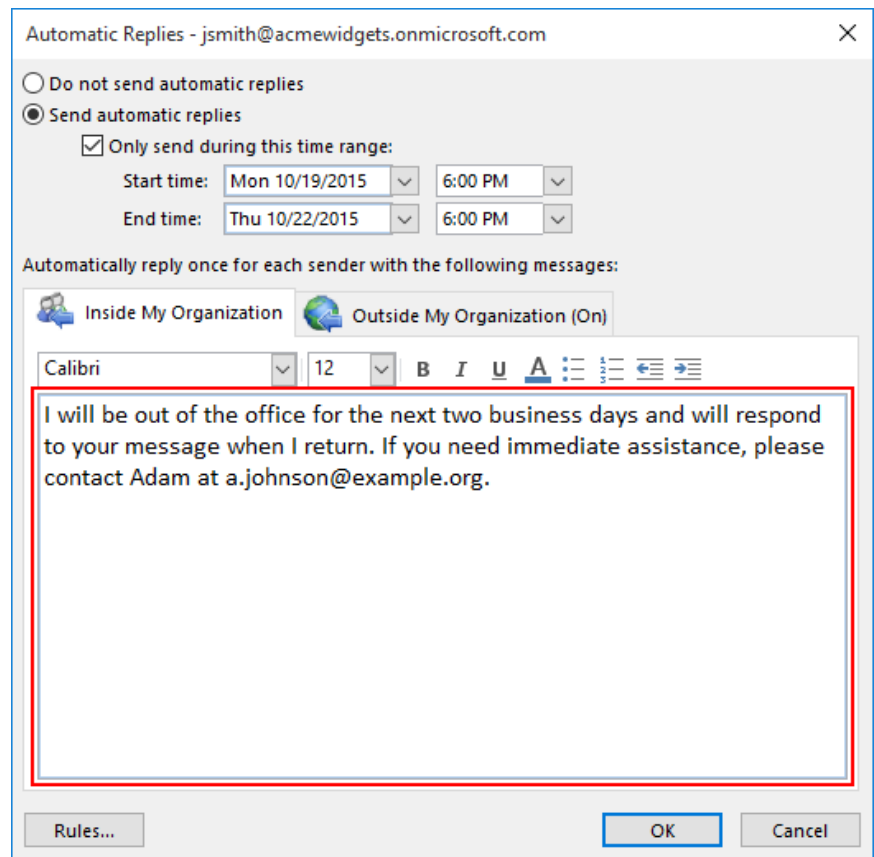
5. Using the “Start time” drop-down menu, choose today’s date and 6:00 PM as the start time:



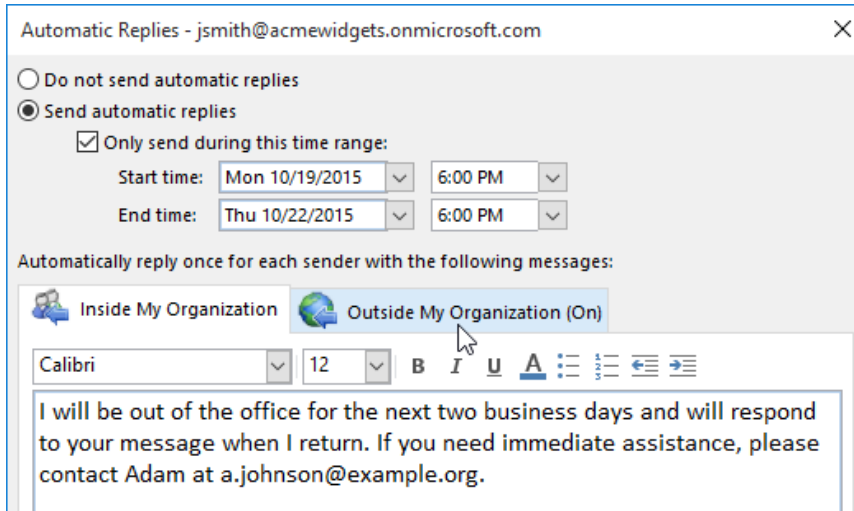
- Using the “End time” drop-down menu, choose whichever date is three business days after the start date. Choose 6:00 PM as the end time:



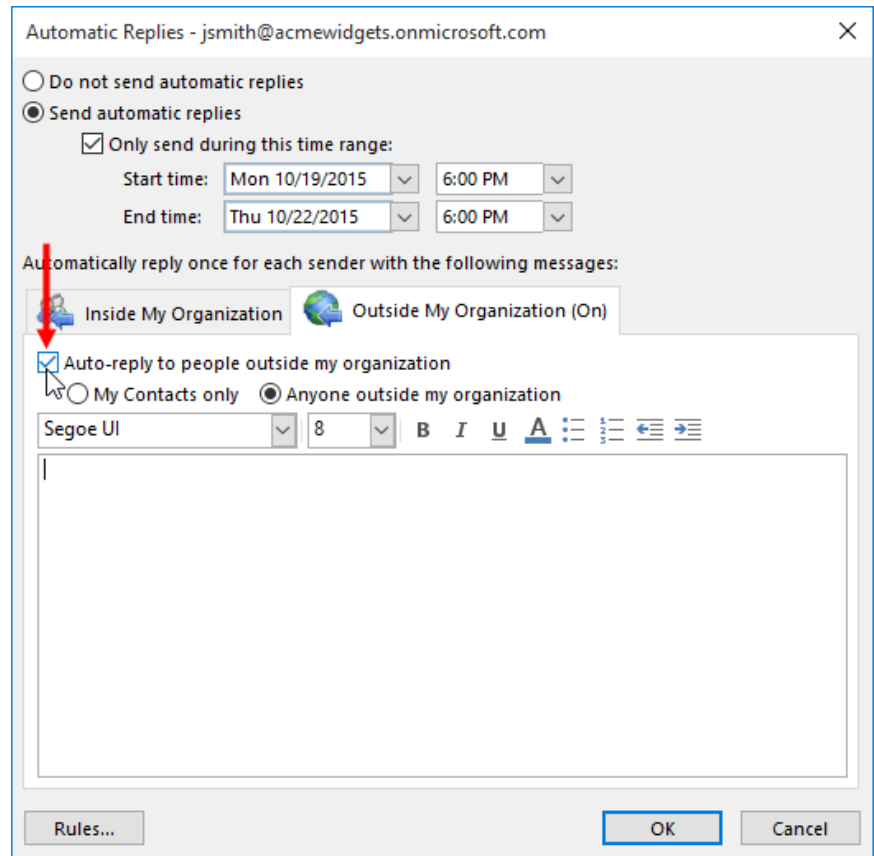
7. Within the Inside My Organization text area, type the following: “I will be out of the office for the next two business days and will respond to your message when I return. If you need immediate assistance, please contact Adam at a.johnson@example.org.”



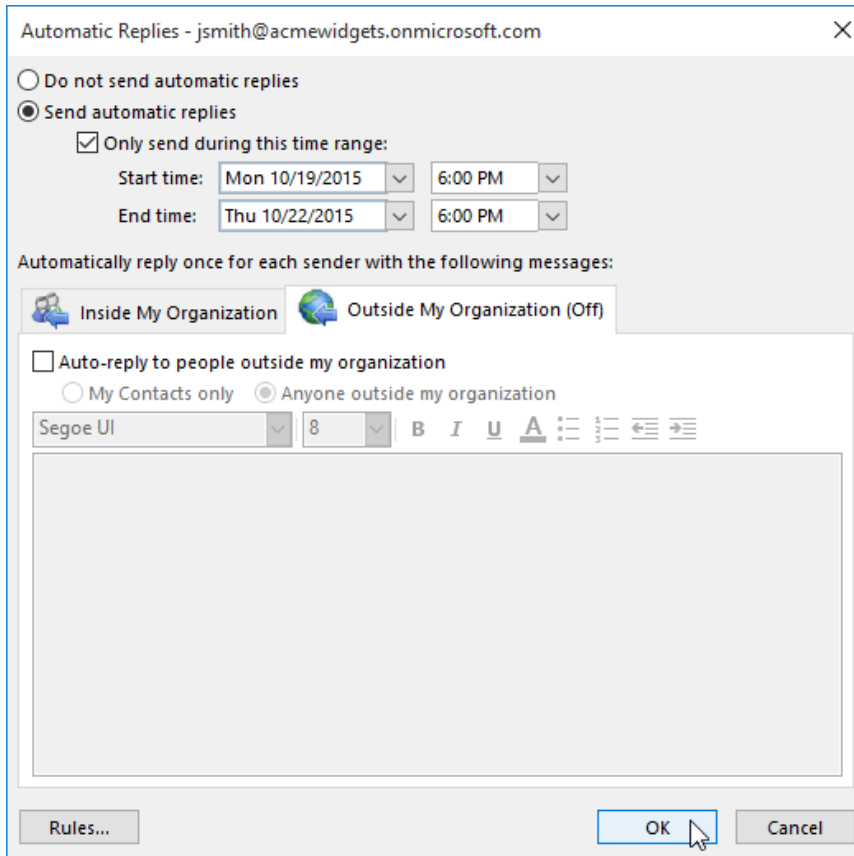
8. You do not want to automatically respond to any messages that you receive from outside of your organization, so click the Outside My Organization tab:



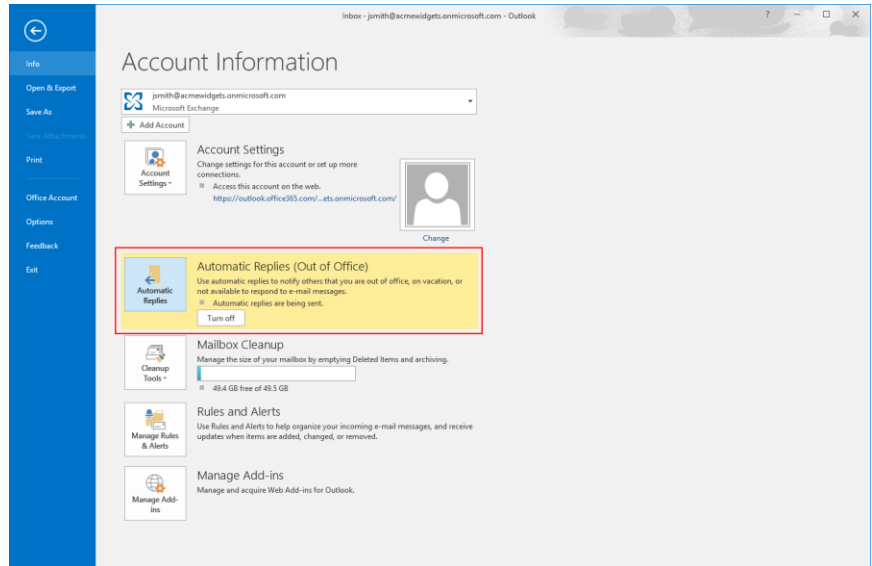
9. Deselect the “Auto-reply to people outside my organization” checkbox:



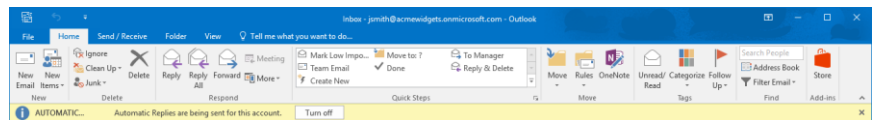
10. Click OK to apply the new settings:



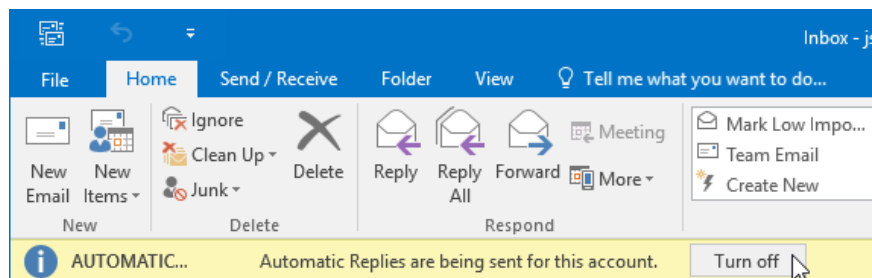
11. Returning to the Info category of the Backstage view, you will see that the Automatic Replies section is now highlighted to indicate that it has been enabled:



12. Return to the primary Outlook workspace by clicking the Back button. The Message Bar will indicate that auto-reply has been enabled:



13. At the last minute your plans have changed and you no longer need to take time off. Turn the Automatic Replies feature off by clicking the Turn Off button on the Message Bar:



14. With the Automatic Replies feature now disabled, close Outlook 2016 to complete this exercise.

Summary

Over the course of this lesson, you learned about the various ways that you can configure some of the advanced message options that Outlook has to offer. You should now feel comfortable inserting special objects into your messages, modifying importance and sensitivity levels, using multiple e-mail accounts, choosing delivery options, and implementing automatic replies.

REVIEW QUESTIONS

1. **What is the easiest way to enter a hyperlink into the body of a new message?**
2. **What is the combo chart type?**
3. **What are the four sensitivity levels that can be assigned to a message?**
4. **What is the command sequence to toggle the Bcc field in a new message?**
5. **Automatic replies can be different based on what?**

LESSON 2: ADVANCED MESSAGE MANAGEMENT

Lesson Objectives

In this lesson you will learn how to:

- Sort messages
- Filter messages
- Organize messages
- Search messages
- Manage junk mail
- Manage your mailbox

TOPIC A: Sort Messages

As you continue to use Outlook 2016, your mailbox will grow to include more and more messages. To help you find what you need, Outlook 2016 provides you with several sorting tools that you can use. Over the course of this topic, you will learn about these tools.

Topic Objectives

In this topic, you will learn:

- About sort criteria
- About the Sort dialog box

SORT CRITERIA

Outlook's sort criteria consists of a list of categories or other parameters that you can use to sort Outlook items. For example, you can use sort criteria to list all of the messages in your inbox in descending order by the name of the sender or if the message has an attachment.

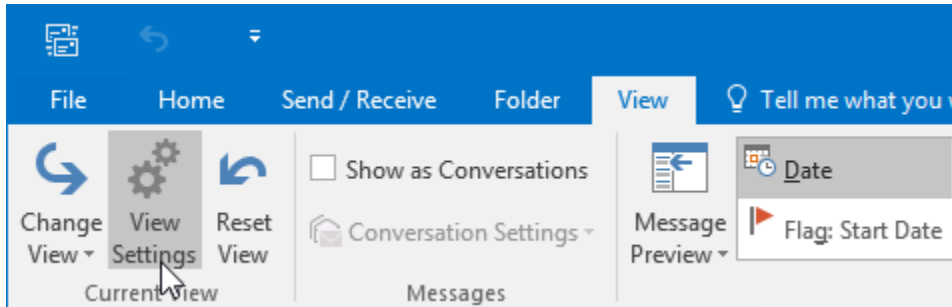
More than one sort criteria can be applied to Outlook items at once. This way you are able to sort items based on, for example, the sender as well as if the message has an attachment. This provides you with an excellent way to find exactly the message that you need.

Sorting vs. Conversations

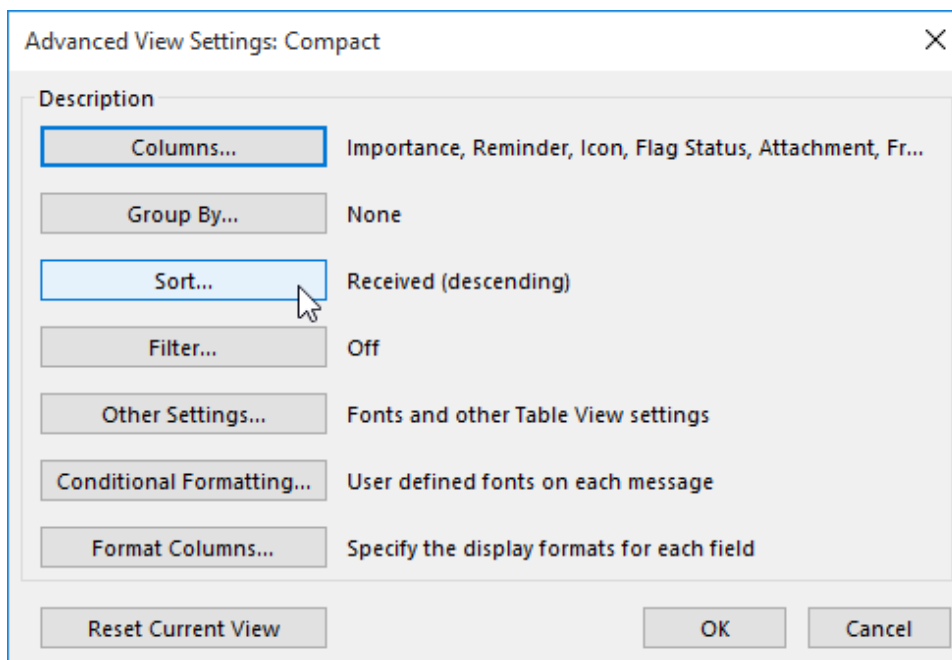
When conversations have been enabled, messages that are all part of the same discussion thread and share the same subject line will be grouped together. While this is somewhat similar to sorting, the conversations feature is a more permanent solution while sorting is typically a temporary measure to find a particular item.

THE SORT DIALOG BOX

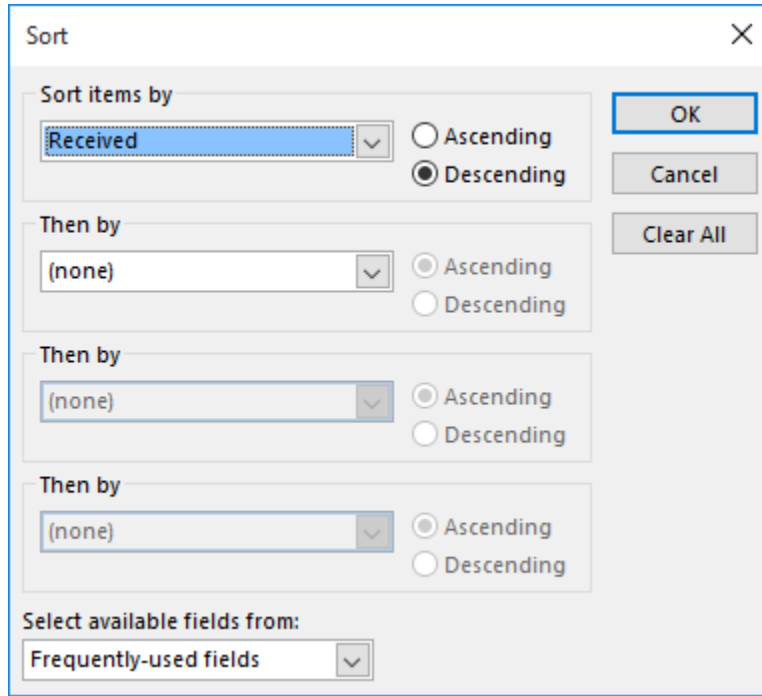
To sort Outlook items within a selected folder, you first need to display the Sort dialog box. To do this, click View → View Settings:



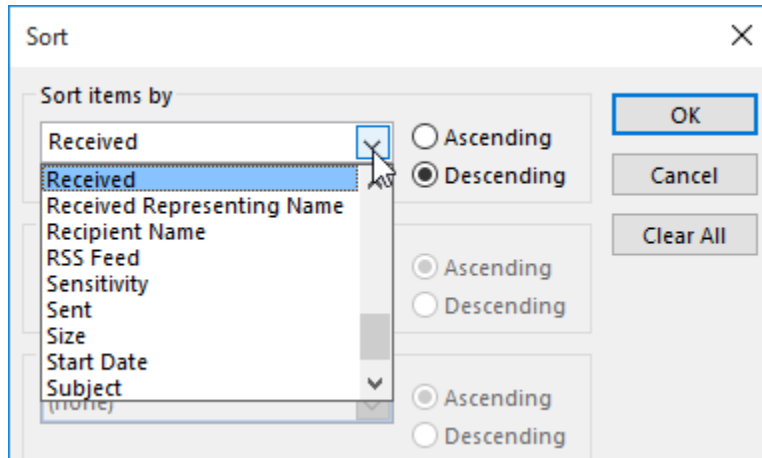
Once the Advanced View Settings dialog box is open, click the Sort button:



The Sort dialog box will then open. You can see that it consists of several drop-down menus that allow you to apply multiple sorting criteria:



Clicking the top drop-down menu will provide you with a list of criteria that you can use to sort Outlook items in the currently displayed folder:



Once an item is selected, you can then choose if you would like to sort these items in ascending or descending order. If you would like to add more sorting criteria, use the remaining drop-down menus in order. Once you click OK, the sorting criteria will be applied to the current folder.

ACTIVITY 2-1

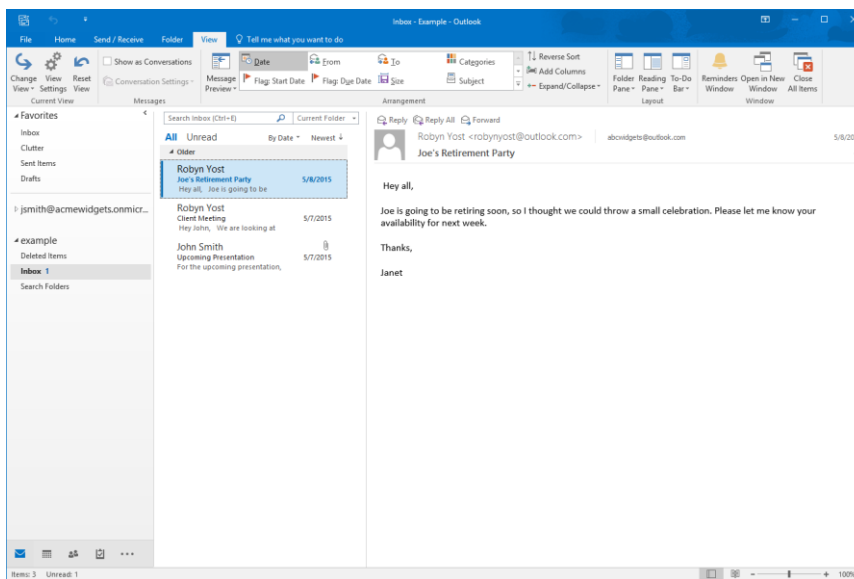
Sorting Messages

You need to find a particular message that includes an attachment and has a subject line that starts with U.

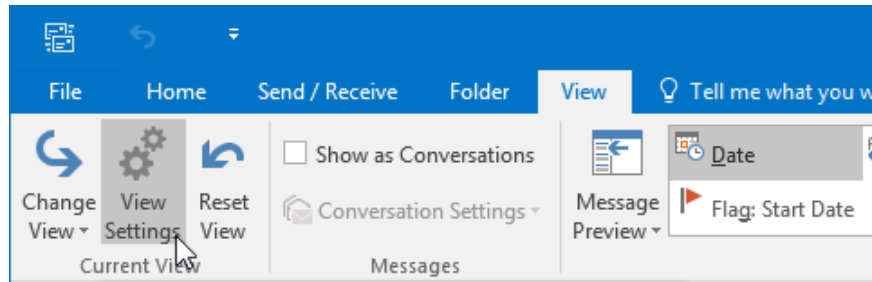
Before students begin, please have them follow these steps to open the Activity 2-1.pst file in their Exercise Files.

- Click the File menu, click Open & Export, and click Open Outlook Data File.
- Browse to Activity 2-1.pst in the Exercise Files folder. Click Open.

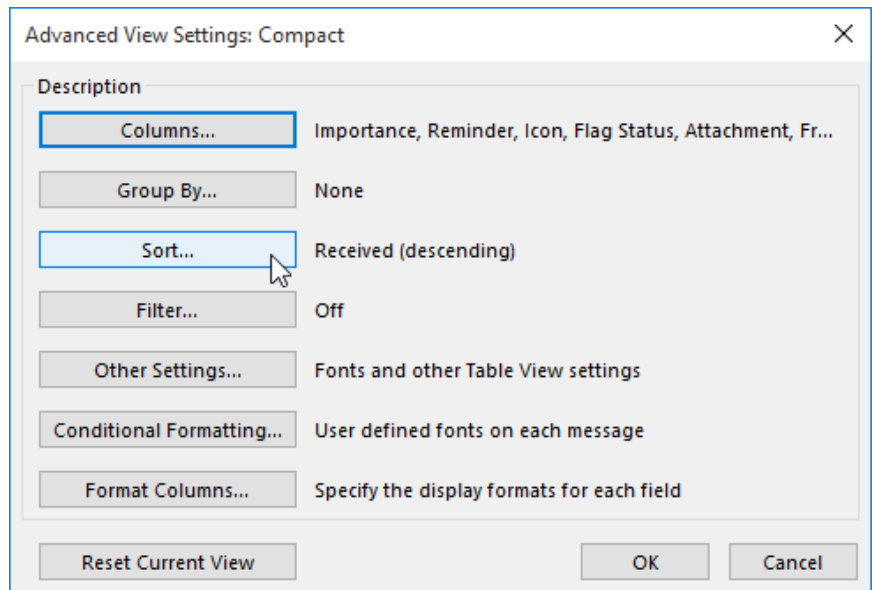
1. To begin, open Outlook 2016. Ensure that the Inbox for the “example” Outlook data file is displayed:



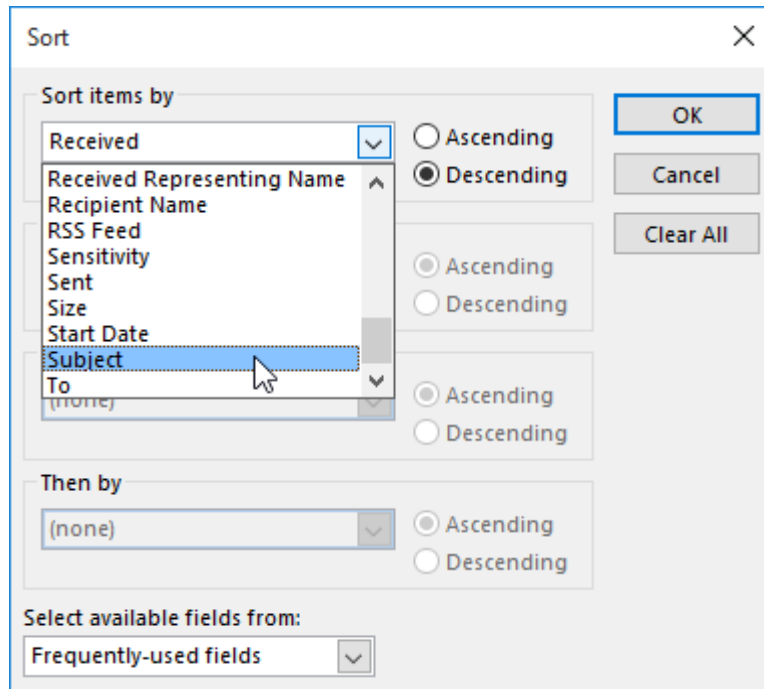
2. Click View → View Settings:



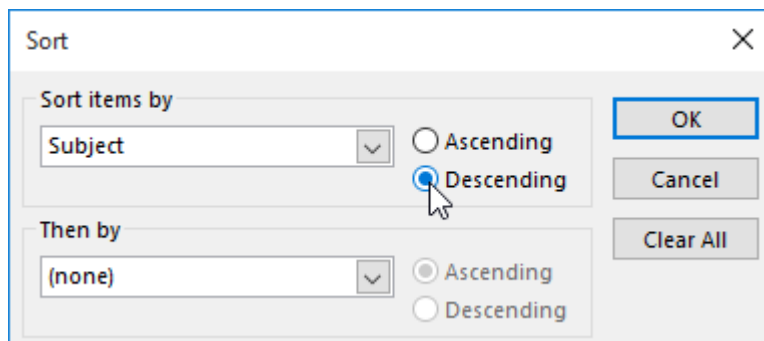
3. The Advanced View Settings dialog box will now be displayed. Click the Sort button:



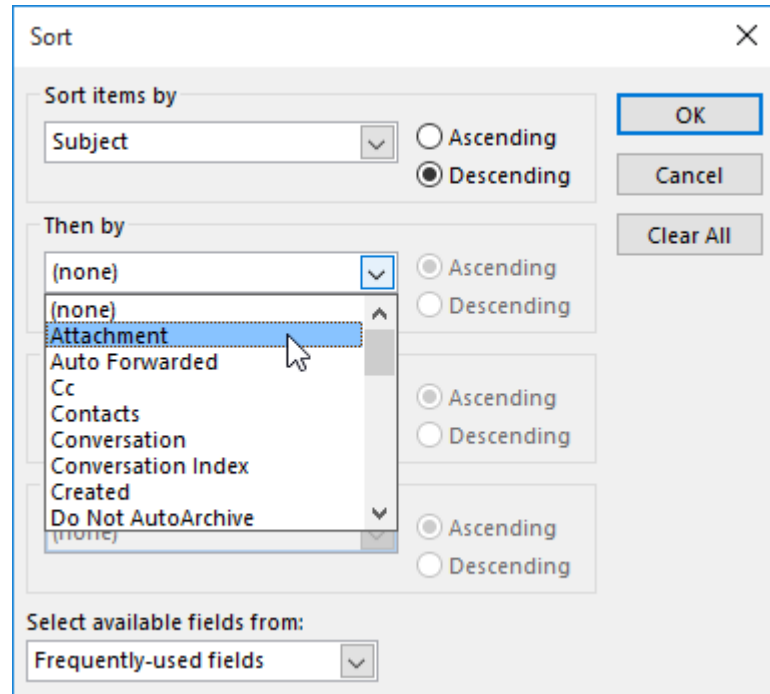
4. Now the Sort dialog box will be displayed. Click the “Sort items by” drop-down menu and click Subject:



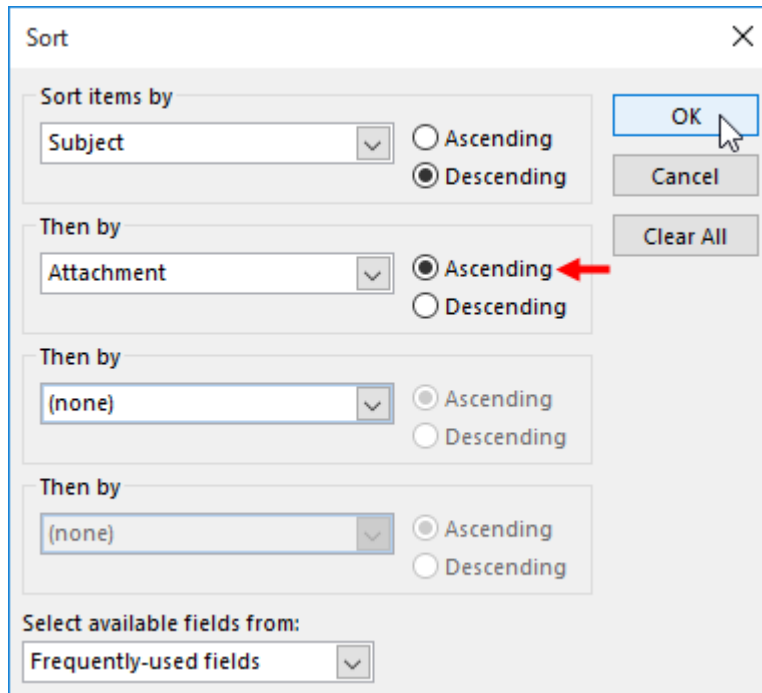
5. Ensure that the Descending radio button for this menu is selected:



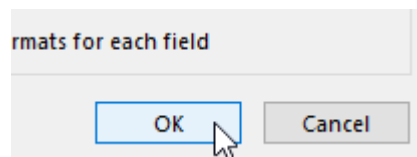
6. Click the “Then by” drop-down menu and choose Attachment:



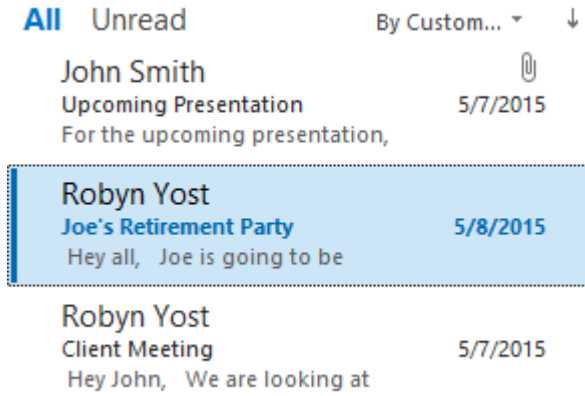
7. Ensure that the Ascending radio button adjacent to this drop-down menu is selected. Click OK to apply the sort:



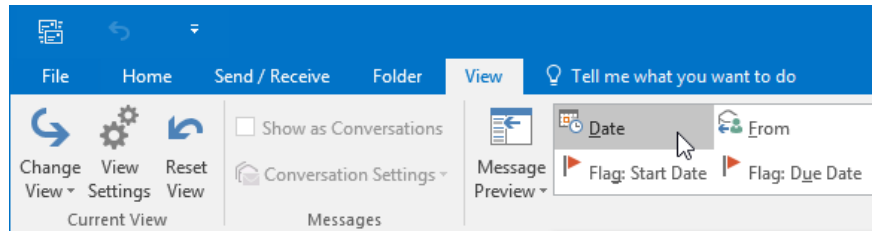
8. Click OK in the Advanced View Settings dialog box:



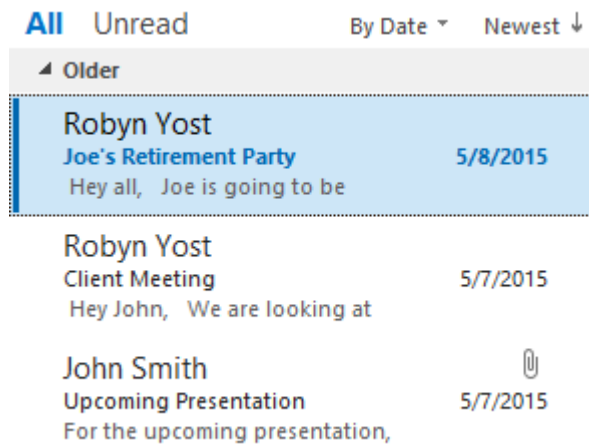
- 9. Examine the message list. You will see that the message from John Smith with “Upcoming Presentation” as a subject line, as well as an attachment, is at the top of the list:



- 10. Return to the default sort settings by clicking View → Date:



11. View the message list. You will see that it is now sorted by date once again with the newest message on top:



12. Close Microsoft Outlook 2016 to complete this exercise.

TOPIC B: Filter Messages

While sorting your messages can help you find the types of messages that you are looking for, filtering them will remove any messages that do not fit your specified criteria. Over the course of this topic, you will learn about message filtering and how to use the Filter dialog box to create your own filters.

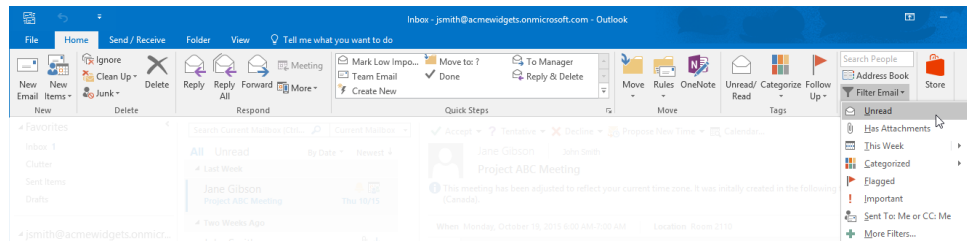
Topic Objectives

In this topic, you will learn:

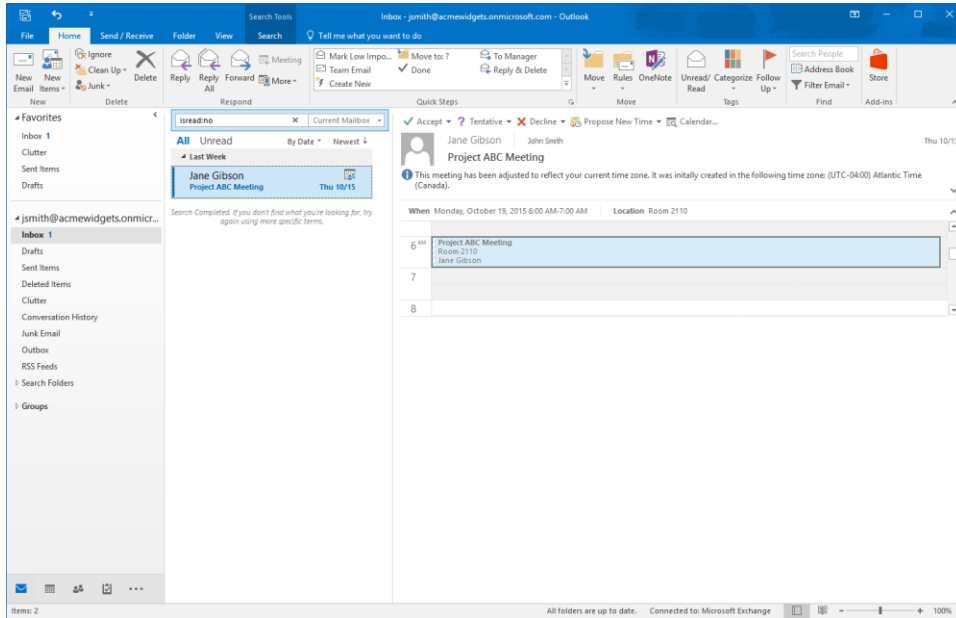
- About filters
- About the Filter dialog box

FILTERS

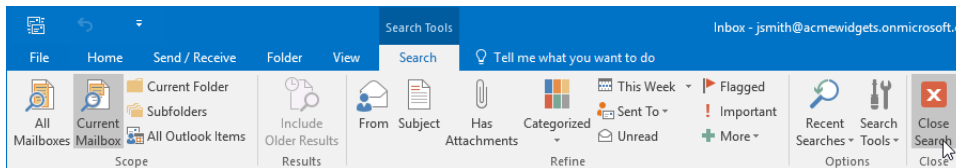
Filters can be applied to folders in your mailbox to display only those Outlook items that match specified criteria. To apply quick (but generalized) filter criteria, click Home → Filter Email → [Criteria]:



Once a filter has been applied, only items within the current folder that match the selected criteria will be displayed. For this example, the Unread filter was applied, so only unread messages are shown:

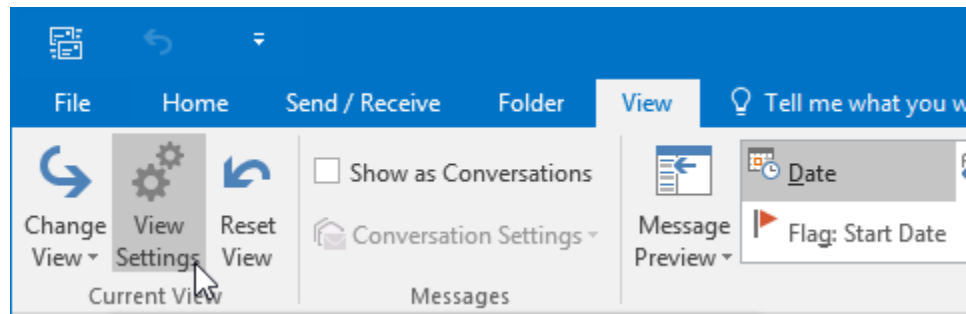


Notice that Outlook has actually performed a search for unread items in this folder only, and as a result has opened the Search Tools contextual tab. To clear the filter and see all items within the current folder, click Search Tools – Search → Close Search:

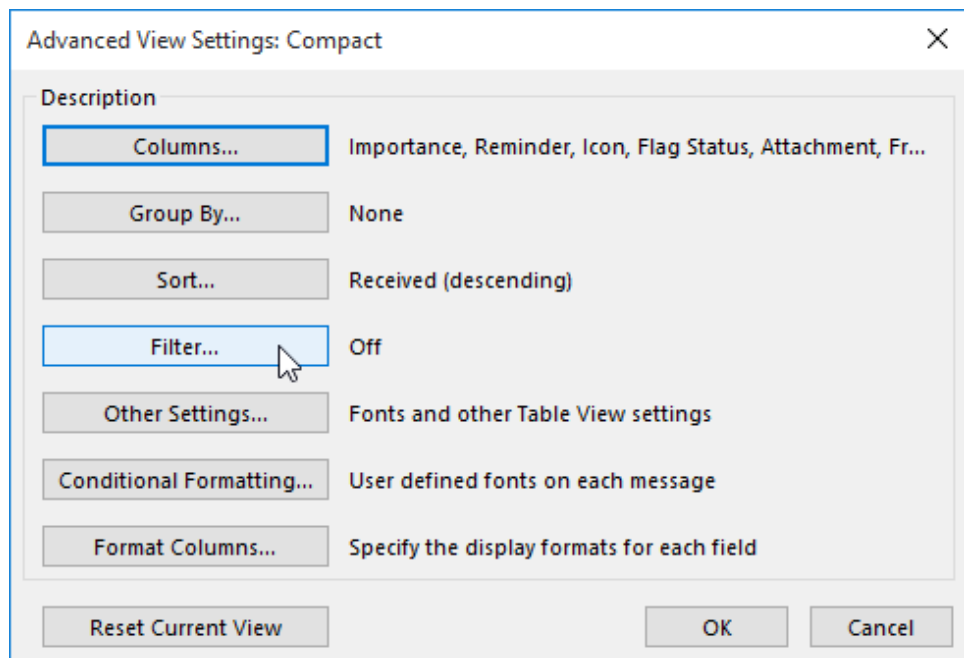


THE FILTER DIALOG BOX

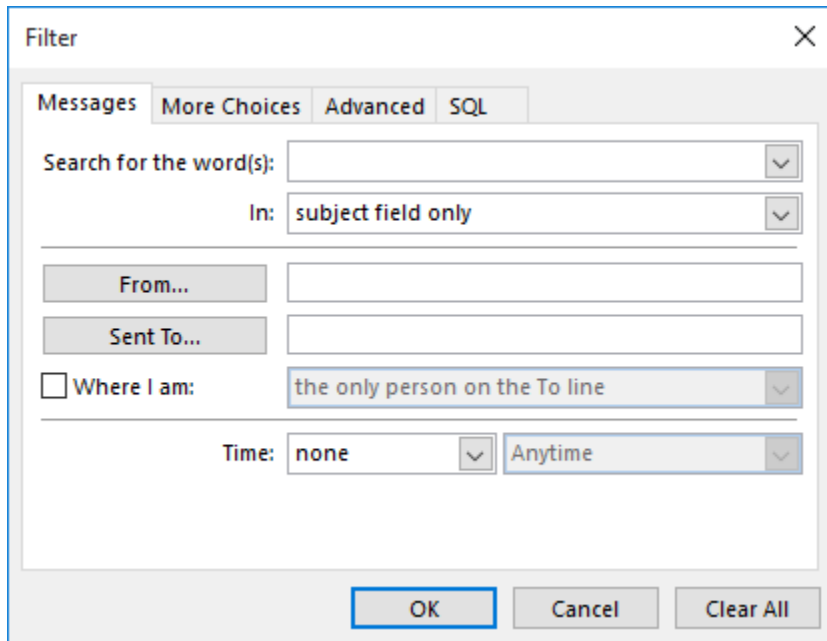
While the quick filters found in the Home → Filter E-mail drop-down menu cover many situations, the Filter dialog box allows you to apply more advanced filters. To open this dialog box, you need to display the Filter dialog box. To do this, click View → View Settings:



Then, with the Advanced View Settings dialog box displayed, click the Filter button:



Once open, you will see that the Filter dialog box is comprised of four tabs: Messages, More Choices, Advanced, and SQL.



Here are the commands that you can find in each tab:

- **Messages:** Displayed by default, the controls on this tab are used to set simple text criteria (such as keywords in the subject line of e-mail or who a message was sent from). You can even use the Time drop-down command at the bottom of this tab to show only messages that you received and sent during a specific time frame.
- **More Choices:** This tab adds more options to complement the Messages tab. Here, you are able to add additional criteria such as color category, importance level, and more.
- **Advanced:** This tab provides controls that allow you to add criteria based on a specified field. For example, if you wanted to filter for messages that have "ceo@example.org" in the CC line, you would use this tab.
- **SQL:** This tab allows you to use SQL code to create a filter. Note that if you want to use this option, ensure that the "Edit these criteria directly" checkbox is selected to enable the accompanying text area. Keep in mind that this will disable all of the other tabs in the Filter dialog box.

Unlike quick filters, any filters that you create using the Filter dialog box will not display the Search Tools – Search contextual tab when they are applied. In order to remove a filter that was applied using this method, you need to click the Clear All button on the Filter dialog box.

ACTIVITY 2-2

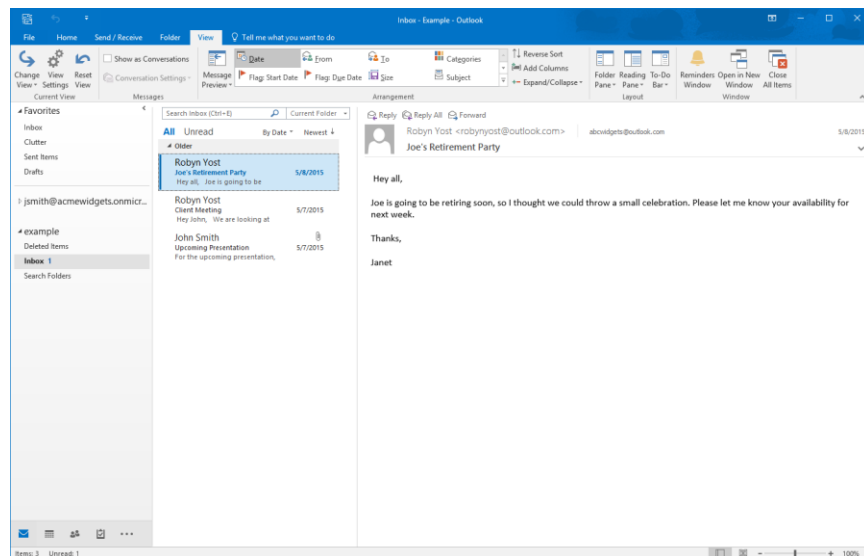
Filtering Messages

You need to find a particular message that includes an attachment and has a subject line that includes the word “presentation” somewhere inside of it.

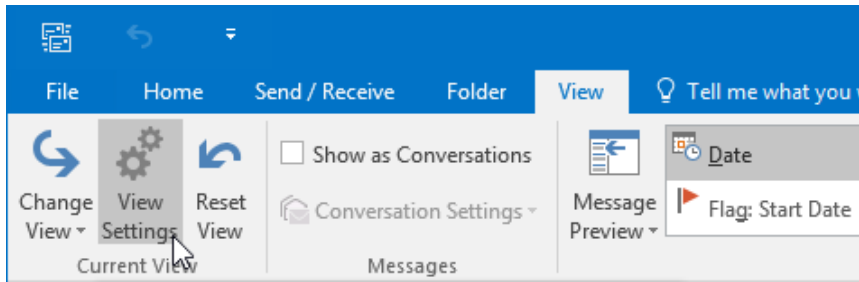
Before students begin, please have them follow these steps to open the Activity 2-2.pst file in their Exercise Files.

- Click the File menu, click Open & Export, and click Open Outlook Data File.
- Browse to Activity 2-2.pst in the Exercise Files folder. Click Open.

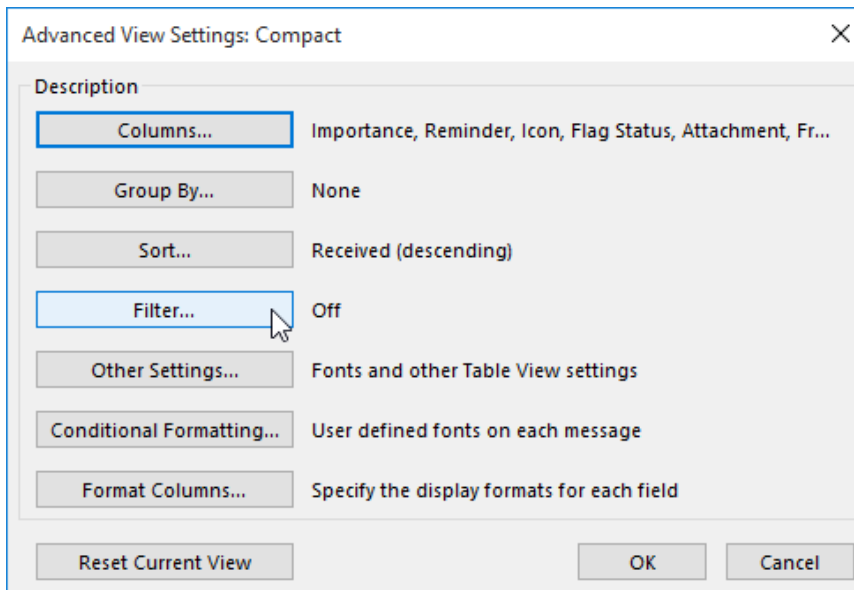
1. To begin, open Outlook 2016. Ensure that the Inbox for the “example” Outlook data file is displayed:



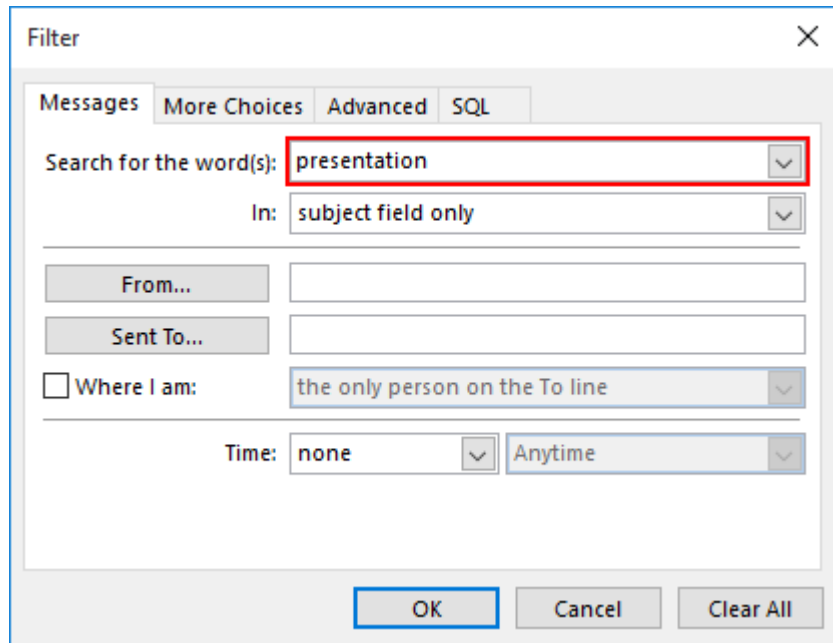
2. Click View → View Settings:



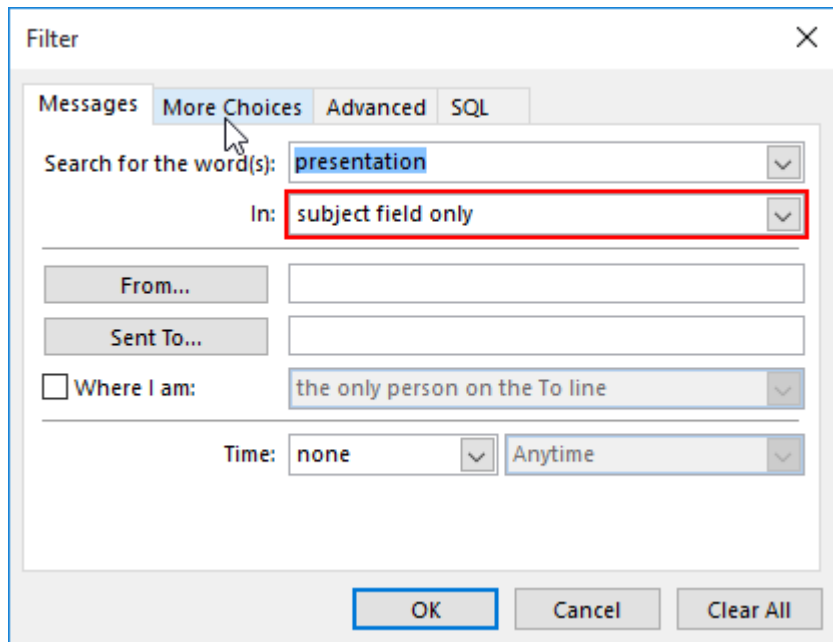
3. The Advanced View Settings dialog box will now be displayed. Click Filter:



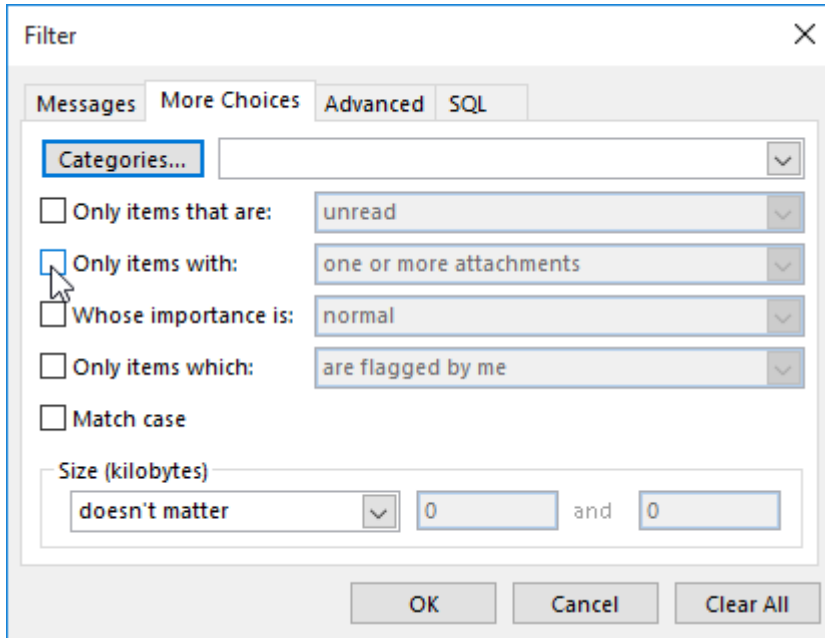
4. With the Messages tab in the Filter dialog box displayed, click inside of the “Search for the word(s)” text box and type “presentation.”



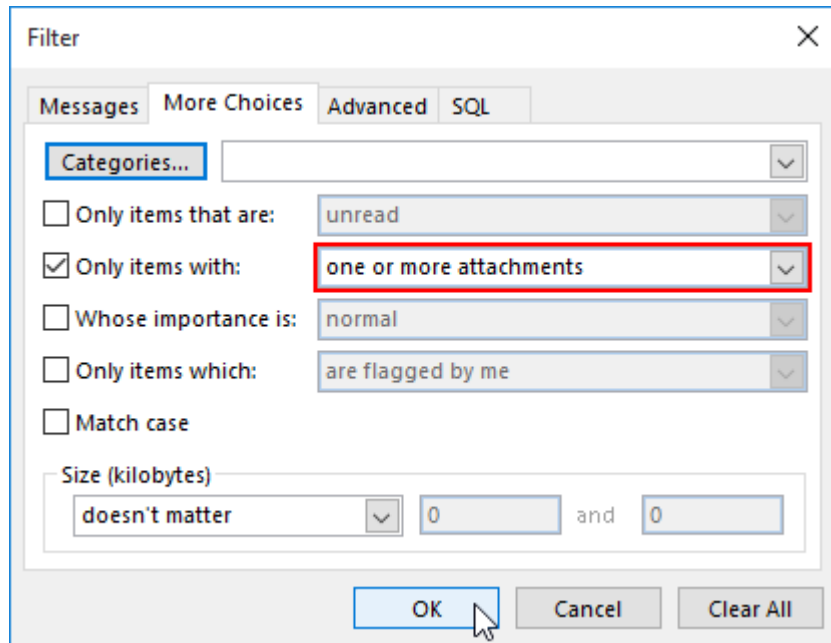
5. Ensure that the In drop-down menu has the “subject field only” option selected. Click the More Choices tab in the Filter dialog box:



6. With the More Choices tab displayed, check the “Only items with” checkbox:



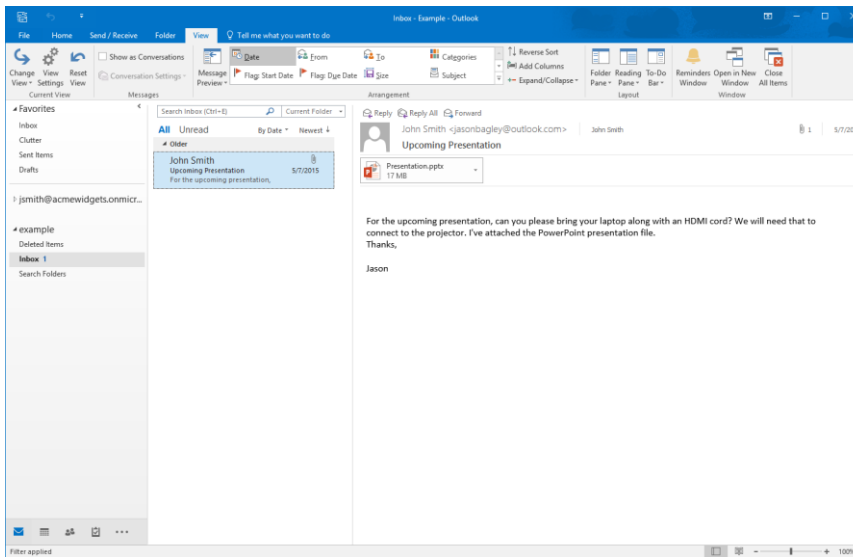
7. Ensure that this drop-down menu is set to “one or more attachments.” Click OK:



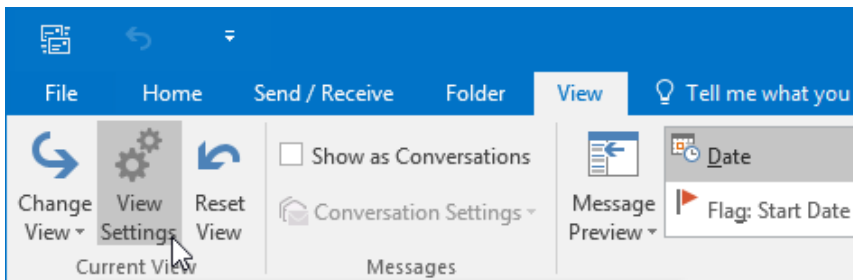
8. Click OK in the Advanced View Settings dialog box:



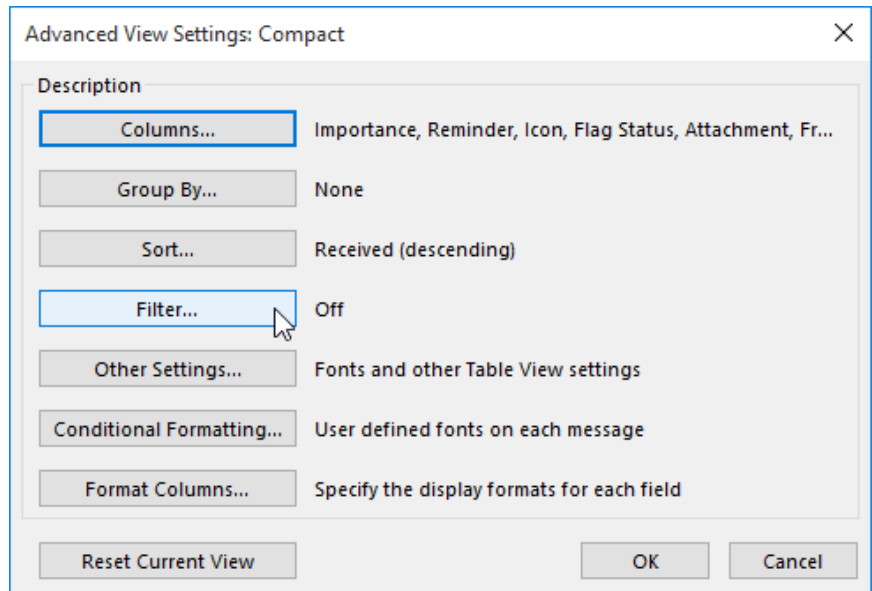
- Returning to the primary Outlook 2016 window, you will see that only one message has made it past the filter. In this case that means that this message includes “presentation” in the subject line and it includes a file attachment:



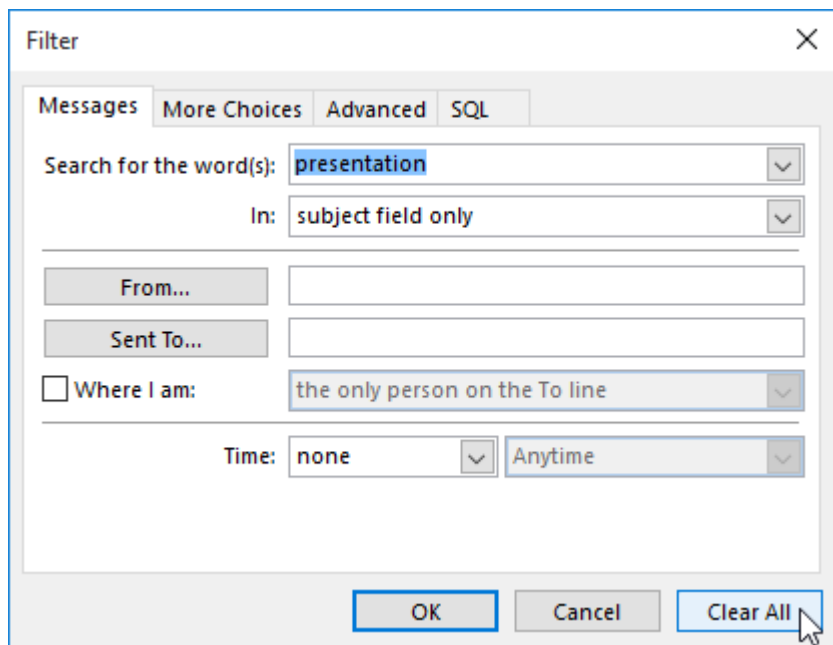
- Now that you found the message that you were looking for, you no longer need the filter. Click View → View Settings:



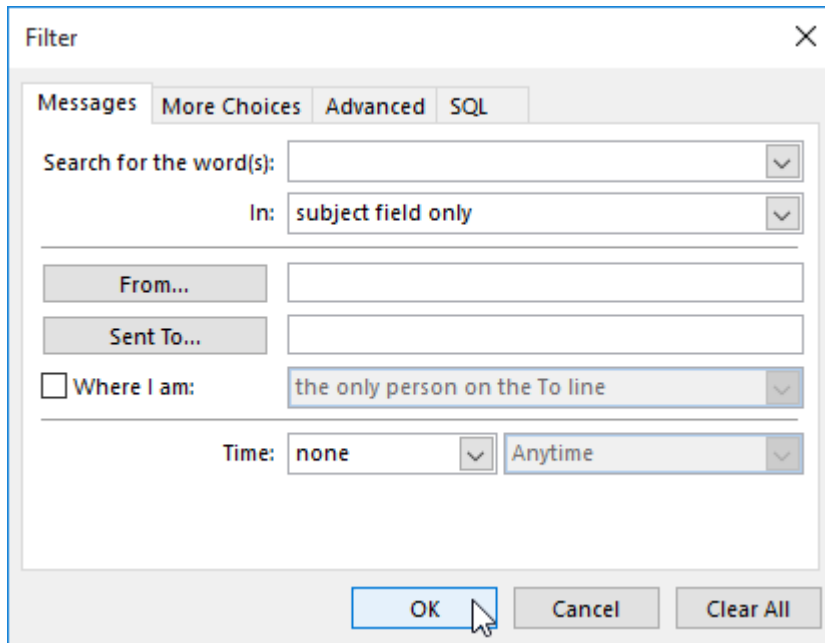
11. The Advanced View Settings dialog box will now be displayed. Click Filter:



12. The Filter dialog box will now be displayed. Click the Clear All button in the lower right-hand corner:



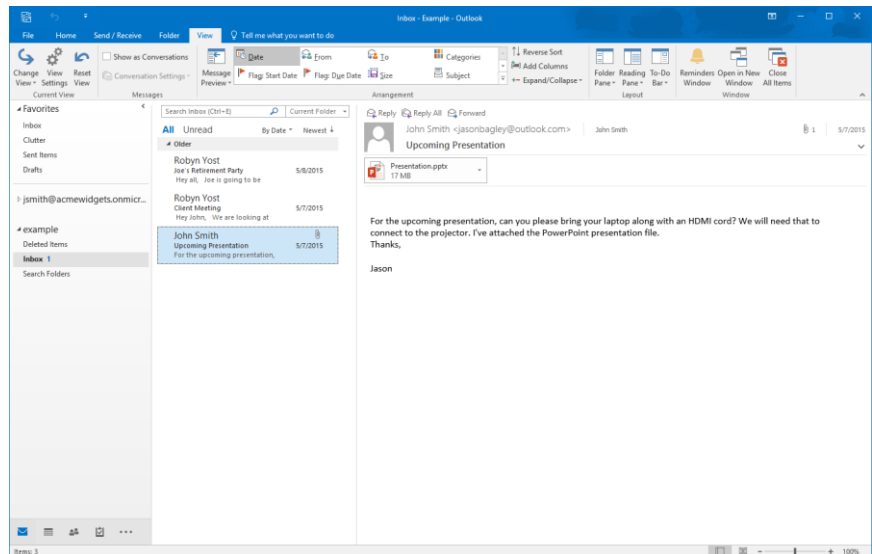
13. Any customizations that you previously made in this dialog box will now have been removed. Apply the new settings by clicking OK:



14. In the Advanced View Settings dialog box, click OK:



15. Returning to the Outlook 2016 window, you will see that all of the items in the currently selected folder will be displayed normally:



16. Close Microsoft Outlook 2016 to complete this exercise.

TOPIC C: Organize Messages

While sorting and filtering tools can be used to find messages based on a set of criteria, you also have the option to organize messages using conditional formatting. For example, you could use conditional formatting to have the subject line of messages from a specific e-mail address formatted in a certain way. Over the course of this topic, you will learn how to organize messages using conditional formatting.

Topic Objectives

In this topic, you will learn:

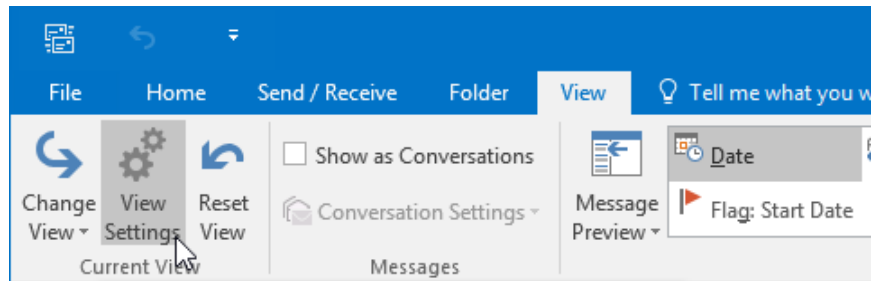
- About conditional formatting
- About the default conditional formatting rules
- About the Rules Wizard

CONDITIONAL FORMATTING

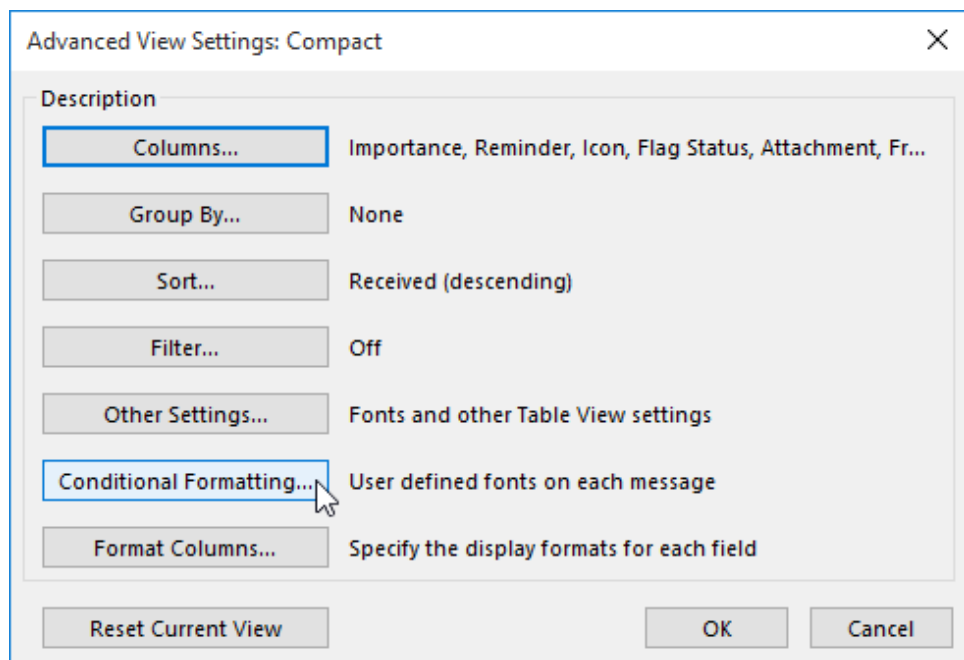
Conditional formatting is a common tool that is found in many different applications. As the name implies, it will apply formatting to objects based on a previously set list of conditions. In Outlook, this means that you can use conditional formatting to automatically format messages that you receive based on the sender or another condition like the subject line. By using conditional formatting efficiently, you can save yourself a lot of time when trying to keep your mailbox organized.

DEFAULT CONDITIONAL FORMATTING RULES

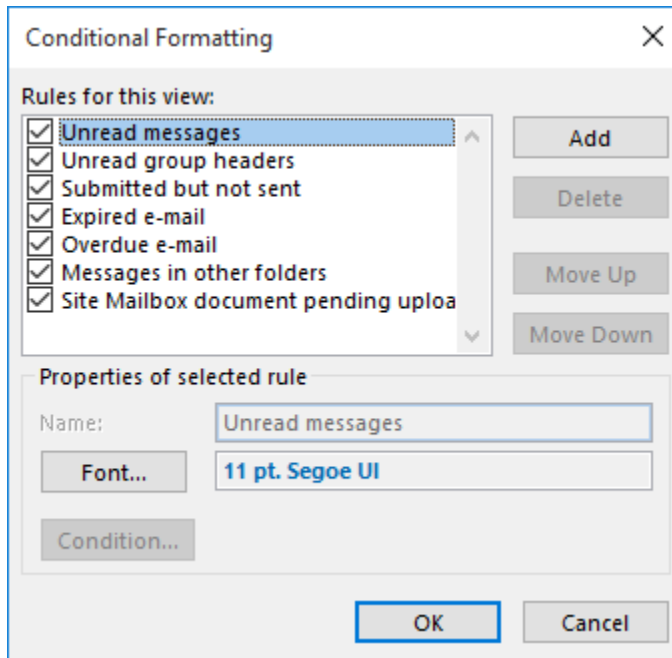
While conditional formatting is customizable by its nature, Outlook provides you with a few different preconfigured rules that are applied by default. To view and apply these rules, first click View → View Settings:



This action will display the Advanced View Settings dialog box. Click the Conditional Formatting button:



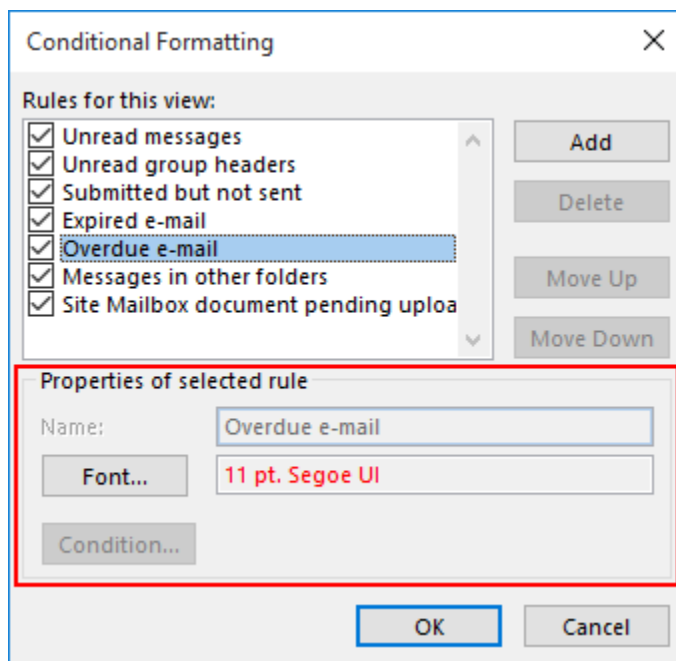
The Conditional Formatting dialog box will open. You will see all of the default conditional formatting rules in the “Rules for this view” list box:



There are seven default conditional formatting rules that you can choose from. Each rule will apply different font settings to messages that meet its criteria. For example, any unread messages will automatically have a bold blue font applied to their subject line:

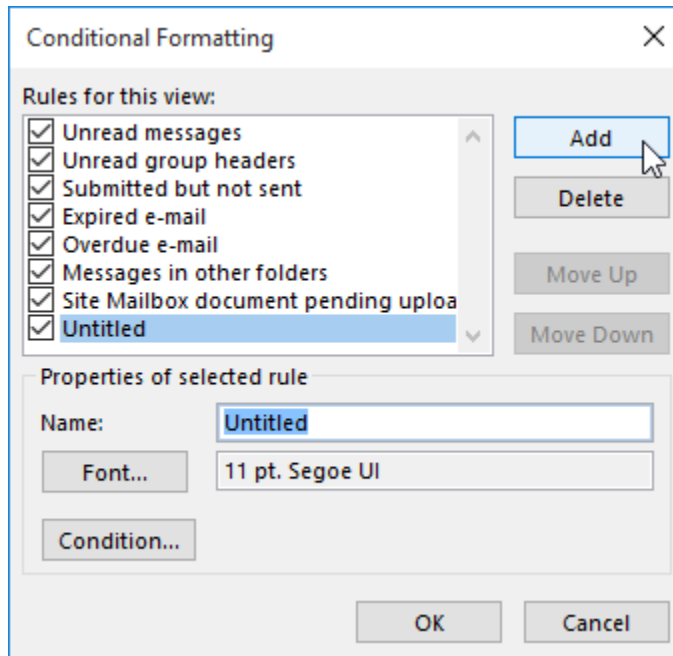


You can disable these default rules by deselecting their associated checkboxes. Or, you can modify their properties using the controls in the “Properties of selected rule” section:



Note that you cannot change the condition that is used for a default rule, nor can you delete a default rule.

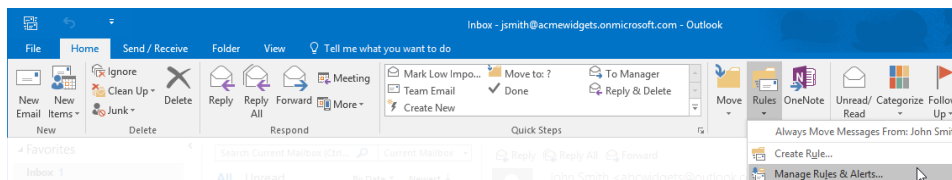
To create a new conditional formatting rule, click the Add button. This will add a new rule to the list and allow you to give it a new name. Using the controls in the “Properties of selected rule” section of this dialog box, you can then choose what font you want applied to a message if the condition is met, as well as choose the condition that you want this rule to be triggered by:



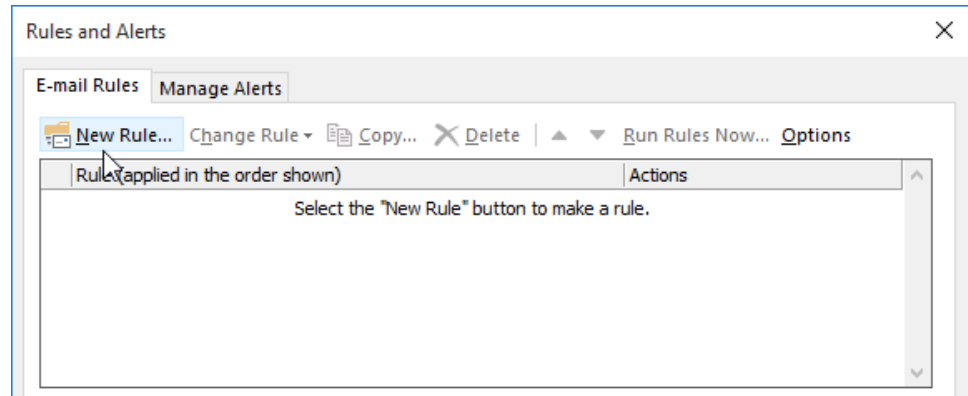
Click OK once you have finished creating your rule.

THE RULES WIZARD

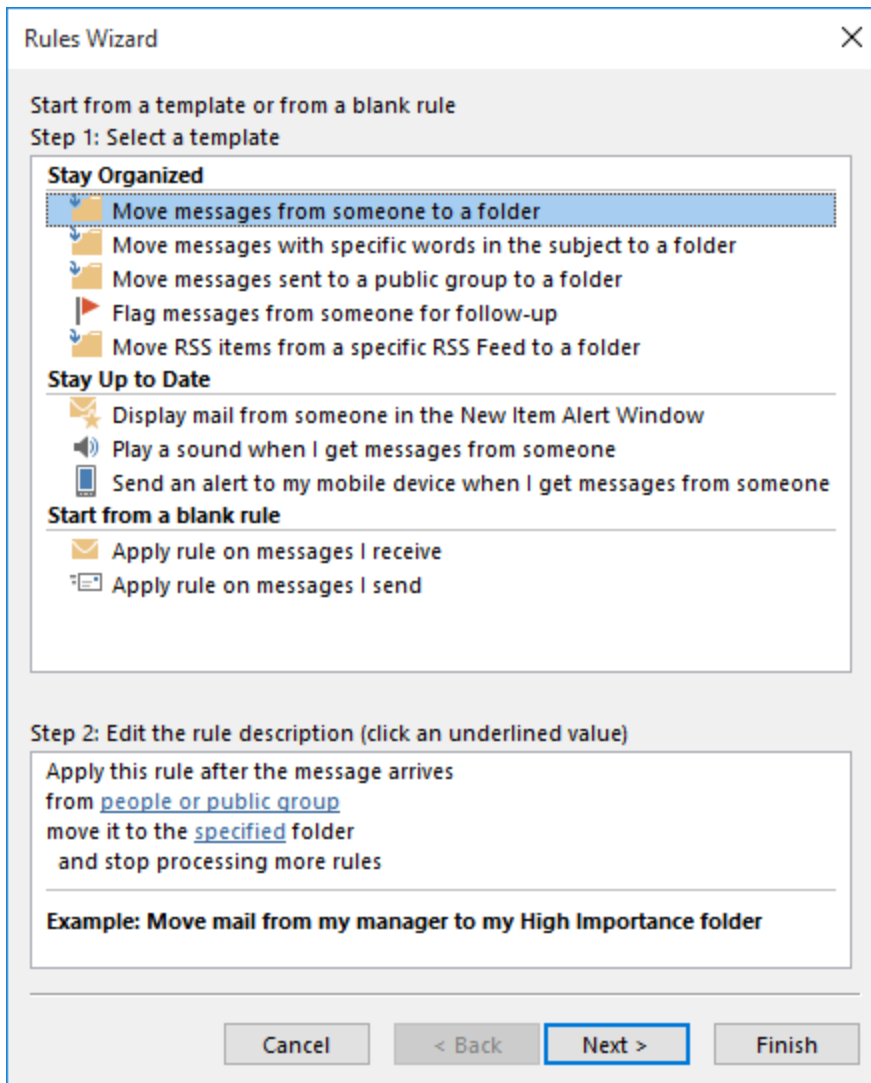
To create a new conditional formatting rule that goes beyond changing the font of a message, you need to use the Rules Wizard. To open this wizard, open the Rules and Alerts dialog box by clicking Home → Rules → Manage Rules & Alerts:



Inside the Rules and Alerts dialog box, click New Rule:



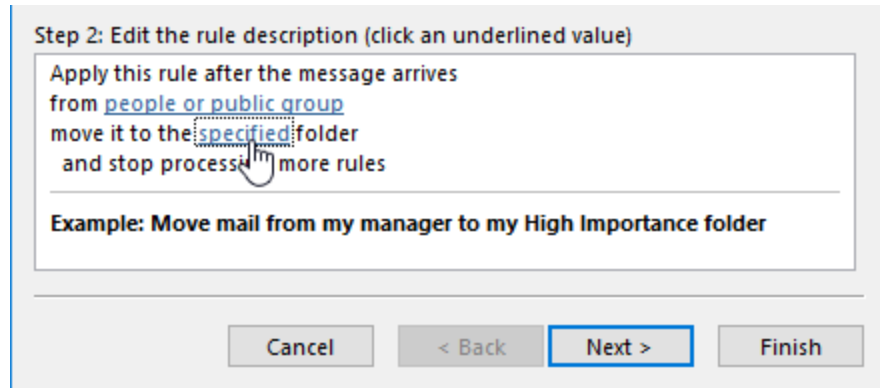
The first step is to choose a template that you would like to base the new rule on:



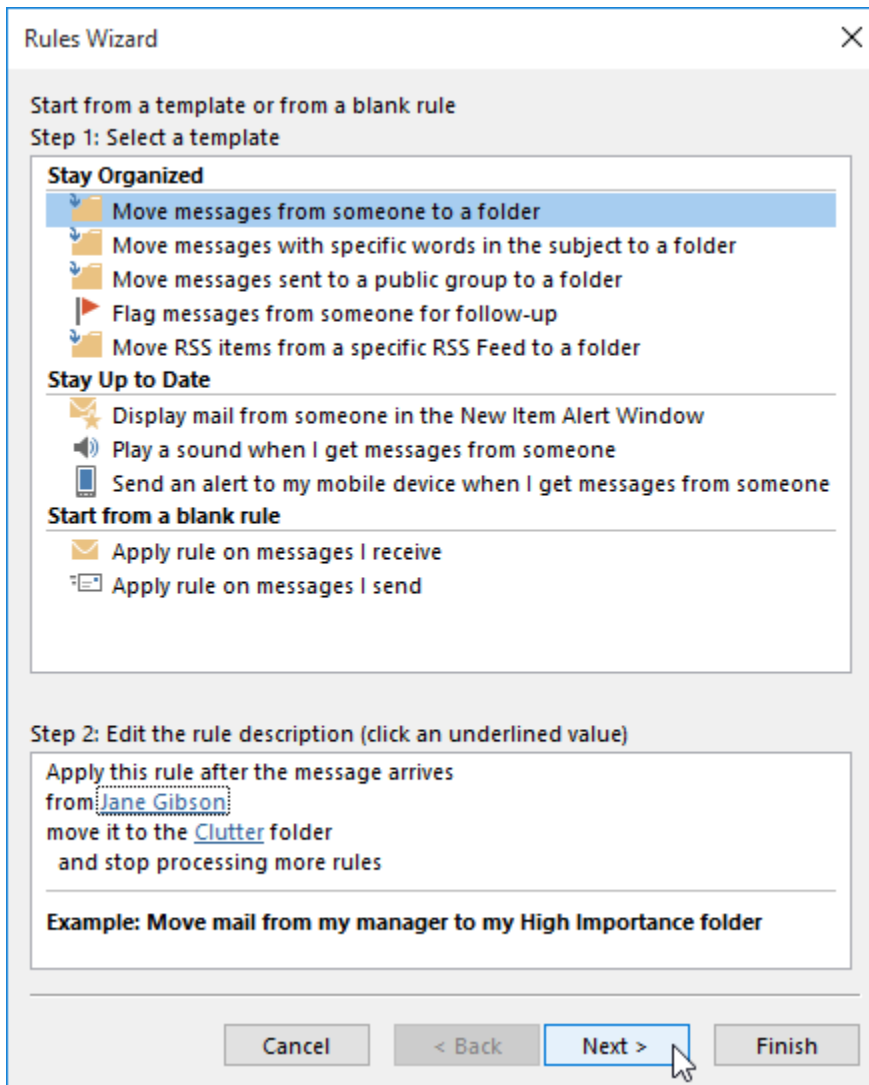
The templates are divided into three sections:

- **Stay Organized:** The templates in this section are used to move messages to other folders or flag them.
- **Stay Up to Date:** The templates in this section are used to control how you are notified when you receive a new message.
- **Start from a blank rule:** The two templates in this section are used to create rules based on messages that you receive or messages that you send.

Once you choose a template, you can specify the values that are needed for the rule to work in the “Step 2” section. This is done by clicking the blue underlined items and choosing from the options presented:



Once you have specified the values for the selected template, the remaining steps of the wizard will already be completed for you. To review them, click Next:



This screen will ask you to specify conditions in addition to the ones that you already specified (these will appear checked in the list):

Rules Wizard

Which condition(s) do you want to check?

Step 1: Select condition(s)

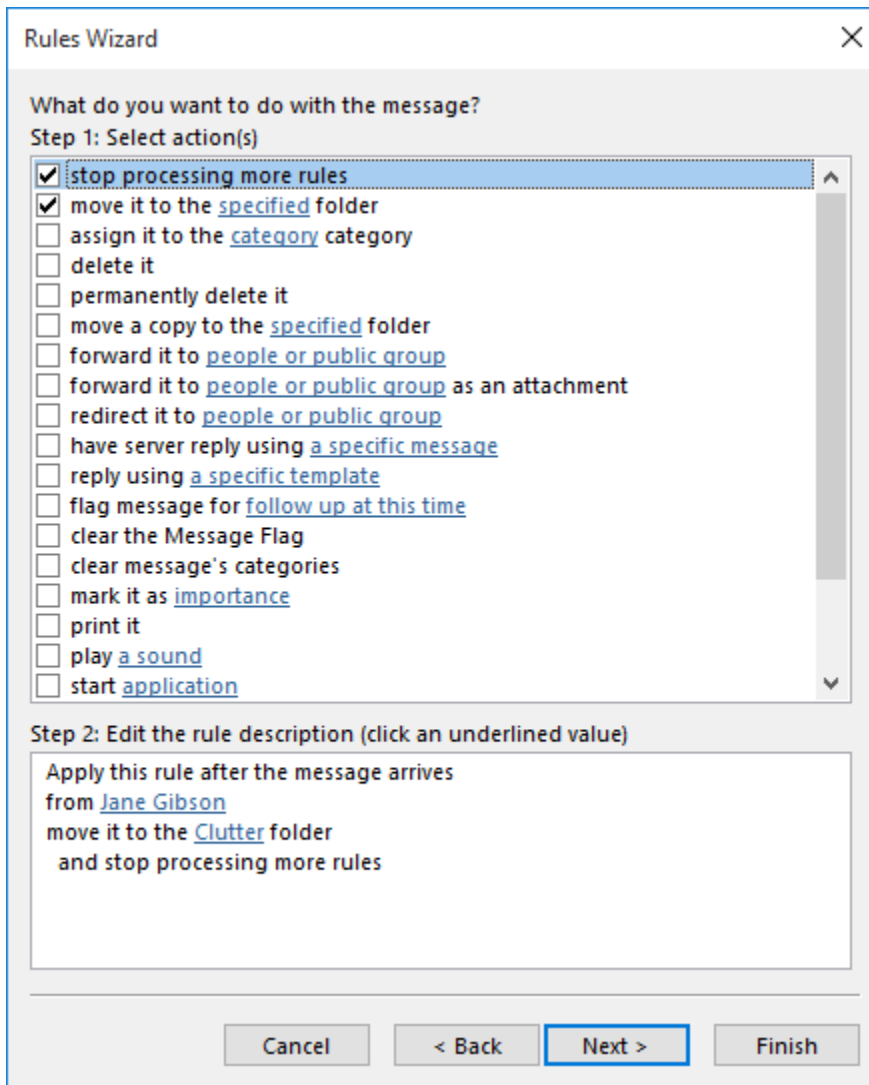
- from people or public group
- with specific words in the subject
- through the specified account
- sent only to me
- where my name is in the To box
- marked as importance
- marked as sensitivity
- flagged for action
- where my name is in the Cc box
- where my name is in the To or Cc box
- where my name is not in the To box
- sent to people or public group
- with specific words in the body
- with specific words in the subject or body
- with specific words in the message header
- with specific words in the recipient's address
- with specific words in the sender's address
- assigned to category category

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
from Jane Gibson
move it to the Clutter folder
and stop processing more rules

Cancel < Back Next > Finish

Clicking the Next button will display the next screen in the wizard. This is where you can modify what actions will take place when the conditions that you previously configured are met:



Clicking the Next button again will provide you with a screen that allows you to set exceptions to the rule that you are creating:

Rules Wizard

Are there any exceptions?

Step 1: Select exception(s) (if necessary)

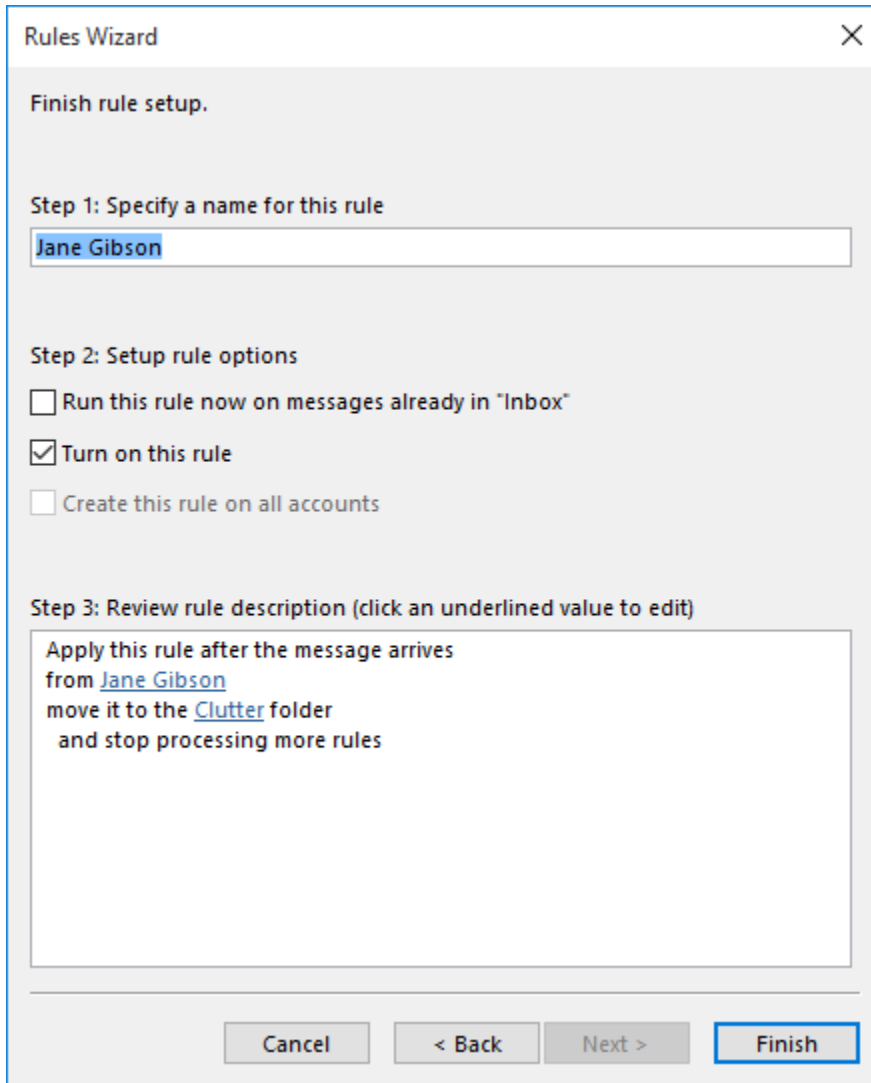
- except if from people or public group
- except if the subject contains specific words
- except through the specified account
- except if sent only to me
- except where my name is in the To box
- except if it is marked as importance
- except if it is marked as sensitivity
- except if it is flagged for action
- except where my name is in the Cc box
- except if my name is in the To or Cc box
- except where my name is not in the To box
- except if sent to people or public group
- except if the body contains specific words
- except if the subject or body contains specific words
- except if the message header contains specific words
- except with specific words in the recipient's address
- except with specific words in the sender's address
- except if assigned to category category

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
from Jane Gibson
move it to the Clutter folder
and stop processing more rules

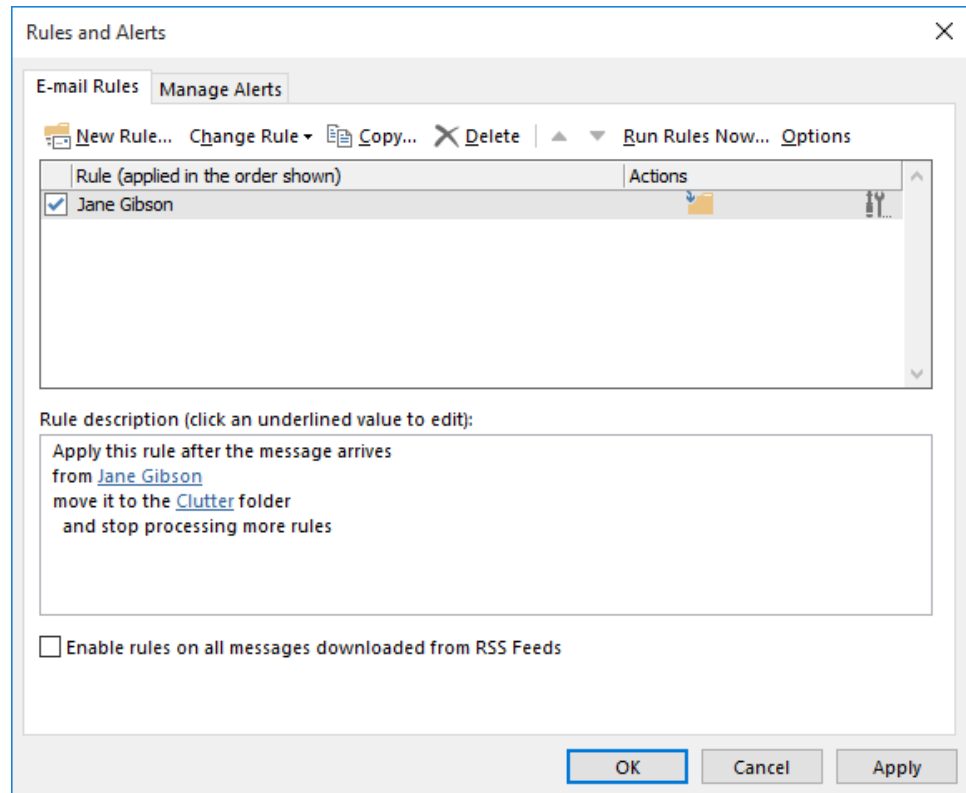
Cancel < Back Next > Finish

Click Next once more. In the final stage of the wizard, you will see options to specify a name for this rule, as well to turn on this rule and apply it to messages in the current folder:



At the bottom of this screen, you will see a summary of the conditions, actions, and exceptions for the rule you've created.

Once you're done, click Finish to complete the rule and return to the Rules and Alerts dialog box:



Here, you can click Apply and OK to save your changes, or click Cancel to cancel and remove your changes. (Be careful; if you've added a rule but you cancel out of the Rules and Alerts dialog box, that rule will be deleted.)

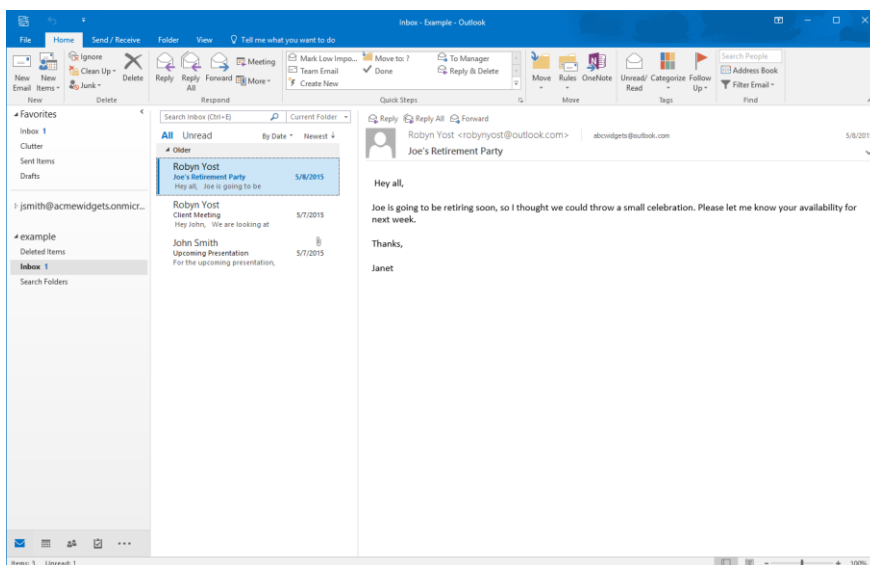
ACTIVITY 2-3

Organizing Your Messages

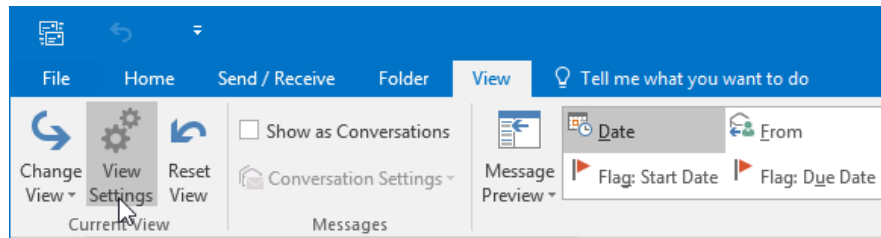
To keep your mailbox organized and prioritize important messages, you would like to move any messages that are sent to you from your company's CEO to a special folder. Additionally, you would like these messages to be marked with red text.

Before students begin, please have them follow these steps to open the Activity 2-3.pst file in their Exercise Files.

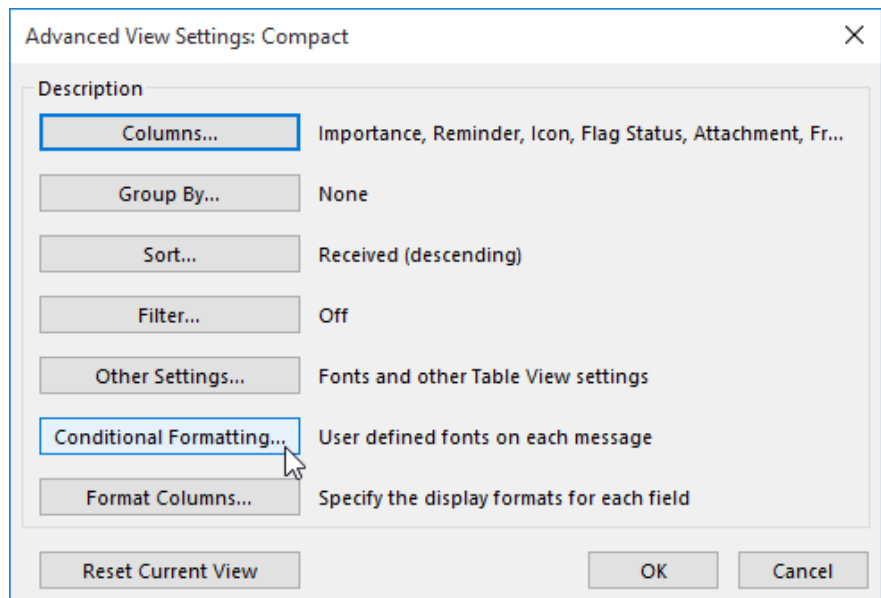
- Click the File menu, click Open & Export, and click Open Outlook Data File.
 - Browse to Activity 2-3.pst in the Exercise Files folder. Click Open.
1. To begin, open Outlook 2016. Ensure that the Inbox for the Example Outlook data file is displayed:



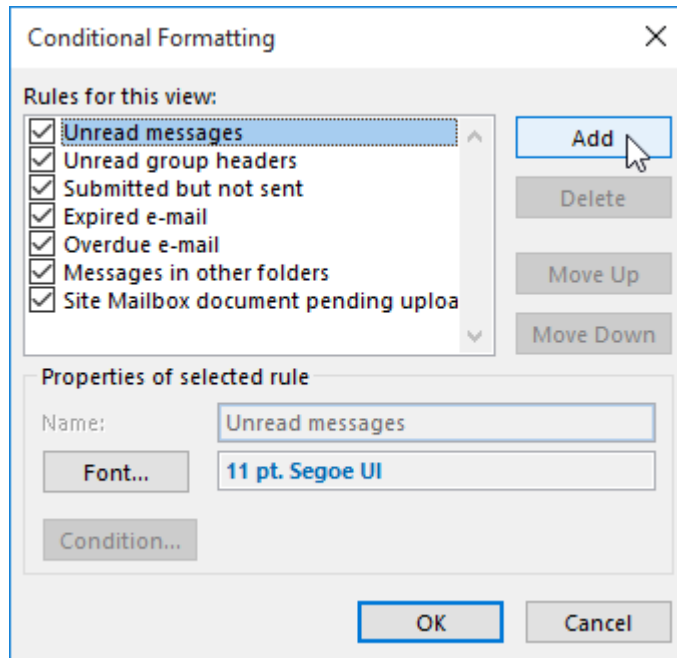
2. First you need to create a conditional formatting rule. Click View → View Settings:



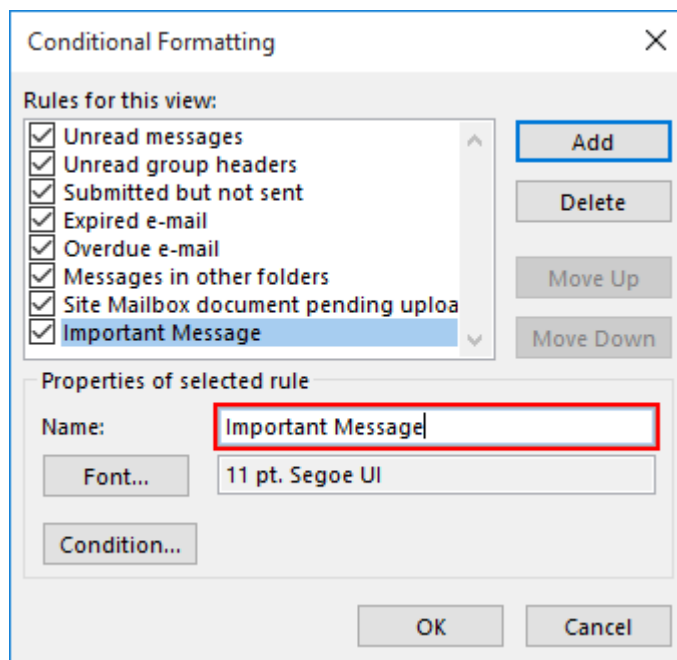
3. With the Advanced View Settings dialog box displayed, click the Conditional Formatting button:



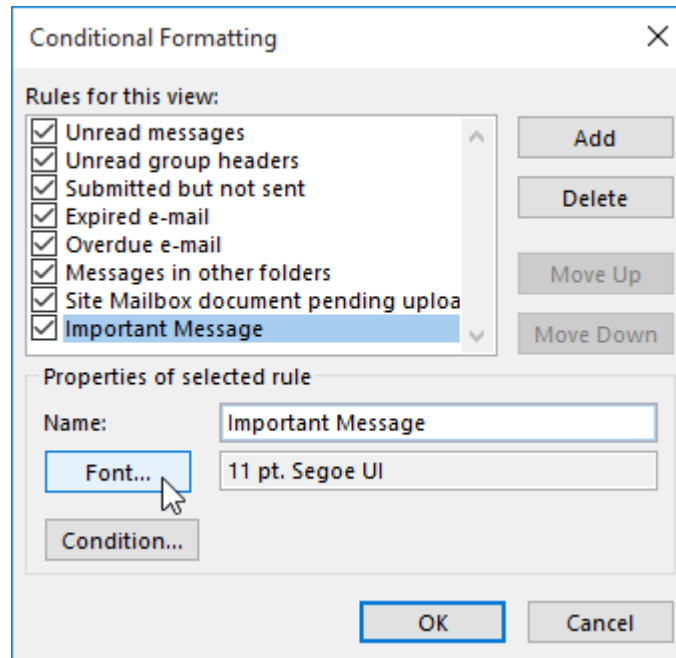
4. The Conditional Formatting dialog box will now be displayed. Click the Add button:



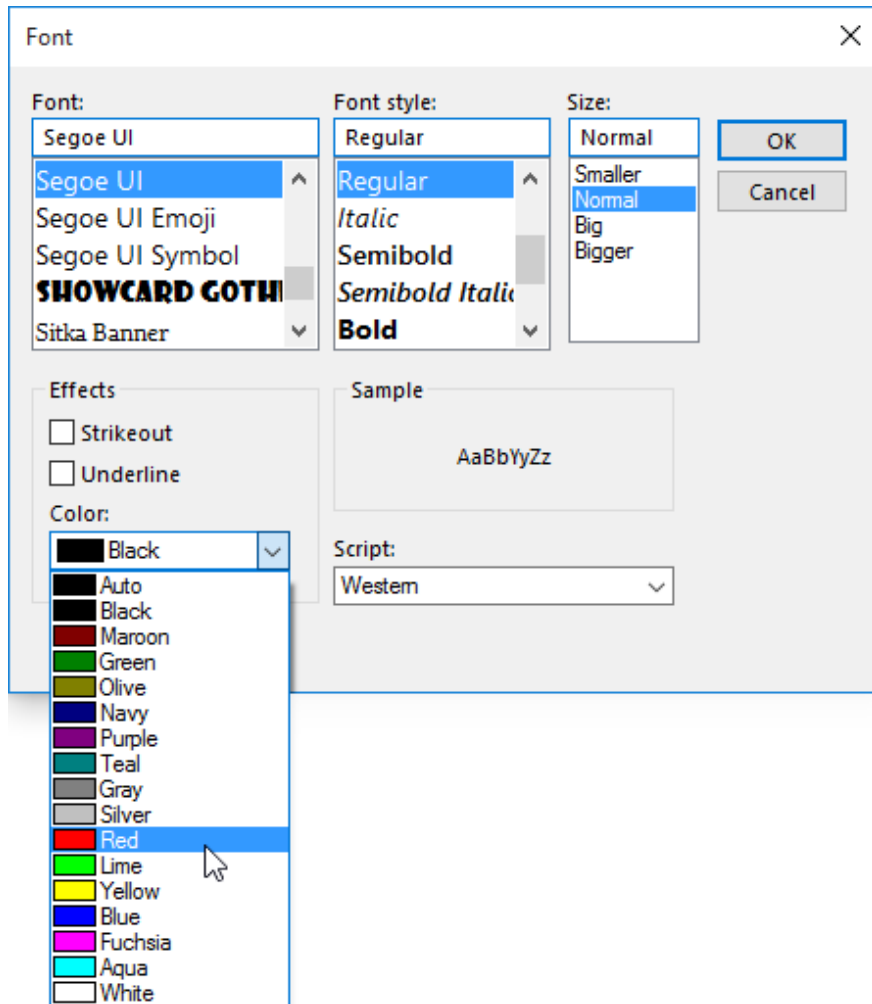
5. The controls in the “Properties of selected rule” section will now be enabled. Inside the Name text box, type “Important Message:”



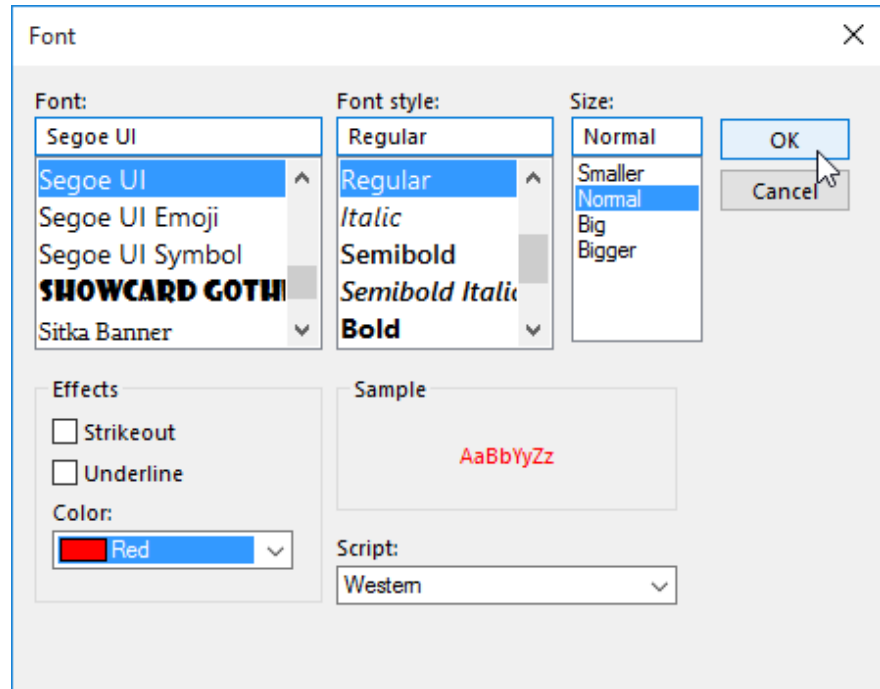
6. Click the Font button:



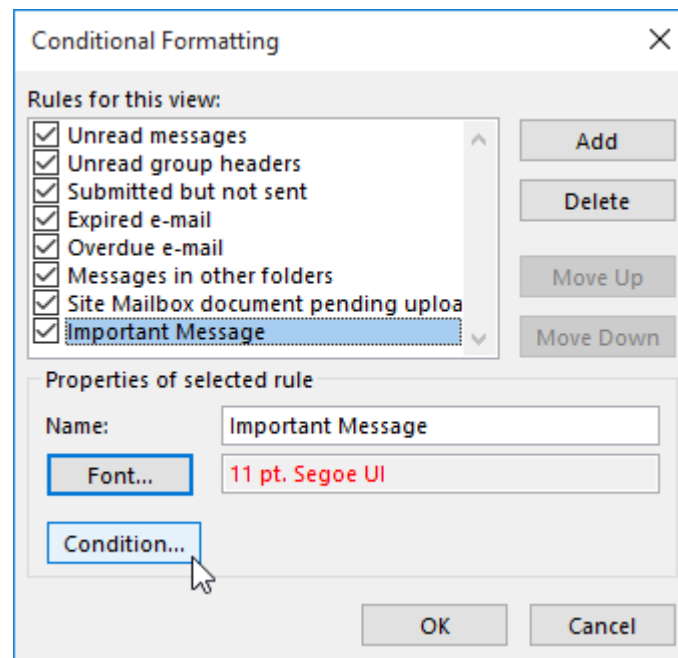
7. The Font dialog box will now be displayed. Click the Color drop-down menu and choose Red:



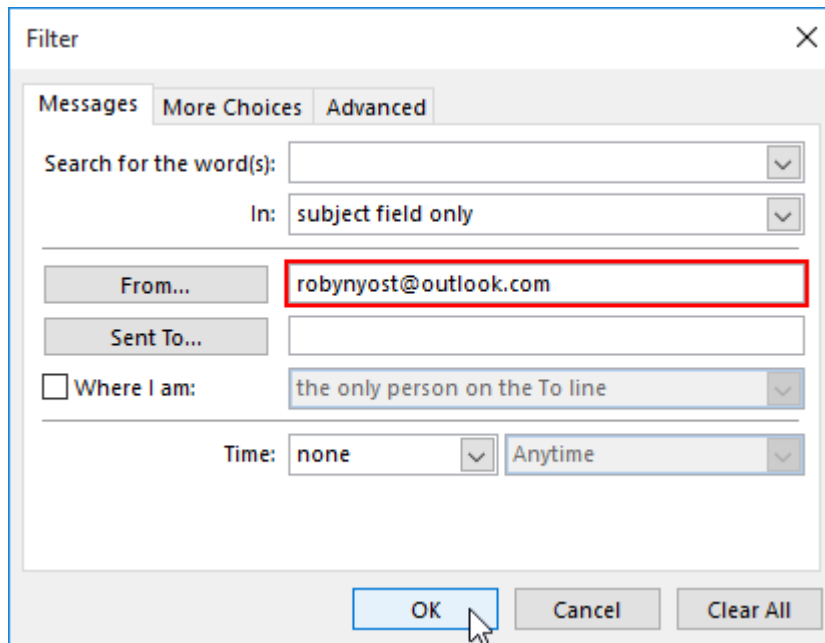
- Click OK to apply the new color settings:



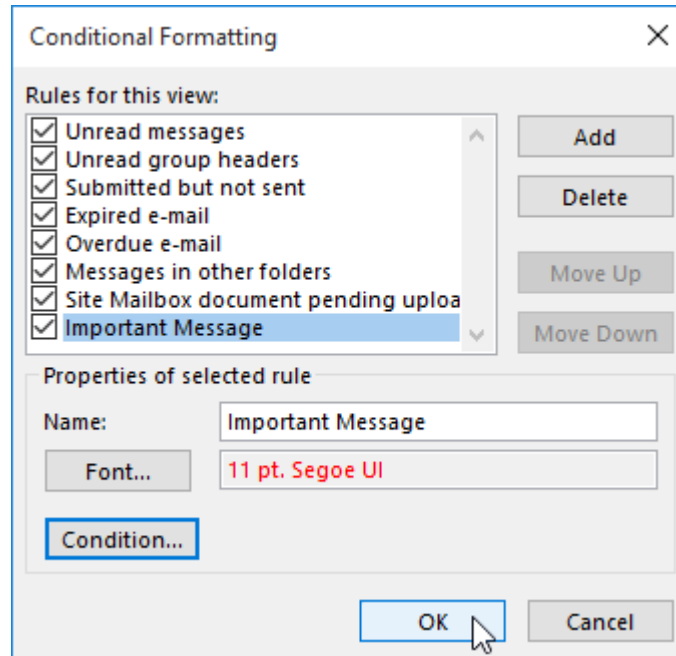
- Back in the Conditional Formatting dialog box, click the Condition button:



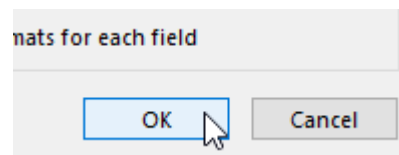
10. The Filter dialog box will now be open to the Messages tab. Inside the From text box, type “robynyost@outlook.com” and then click OK:



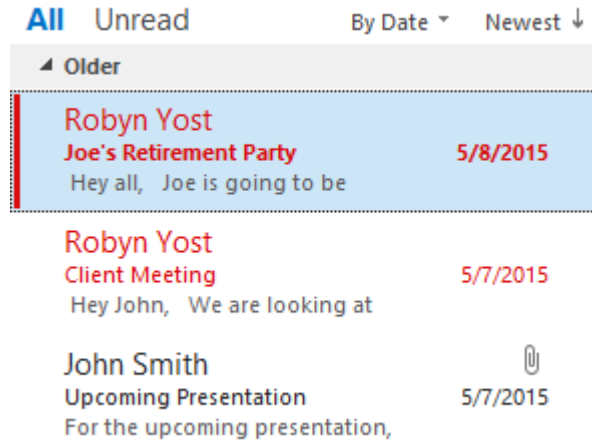
11. Click OK in the Conditional Formatting dialog box:



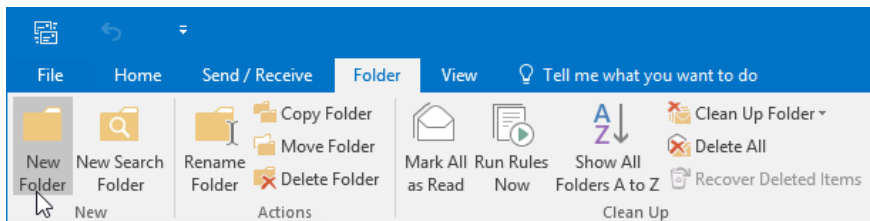
12. Click OK In the Advanced View Settings dialog box:



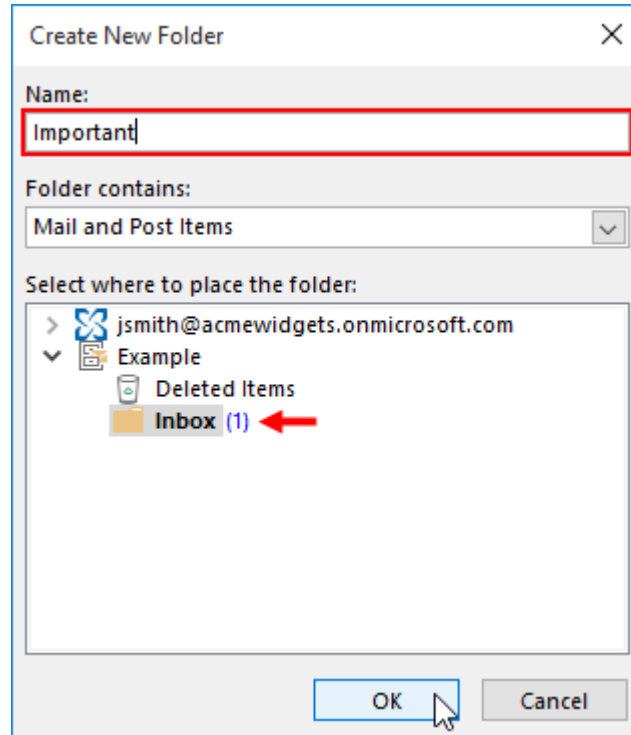
13. Immediately, you will see that two messages in your mailbox have red text. This indicates that they were sent from the e-mail address that you specified in the Filter dialog box:



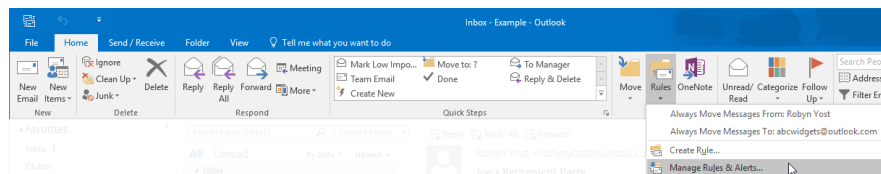
14. Next, you need to create a rule that will move any messages from a specified e-mail address into a separate folder. First, create the new folder by clicking Folder → New Folder:



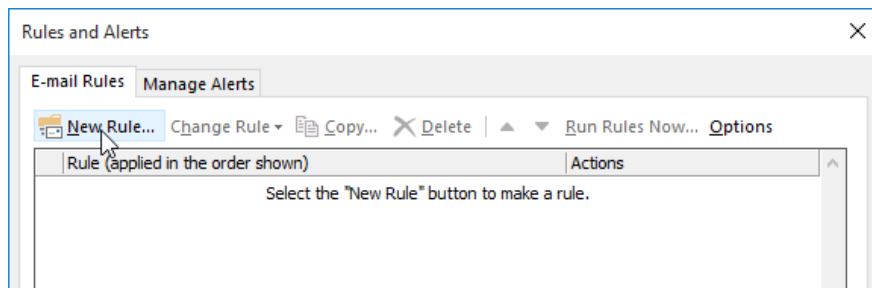
15. The Create New Folder dialog box will now be displayed. Type “Important” into the Name text box. Ensure that the Inbox folder in the Example mailbox is selected. Click OK:



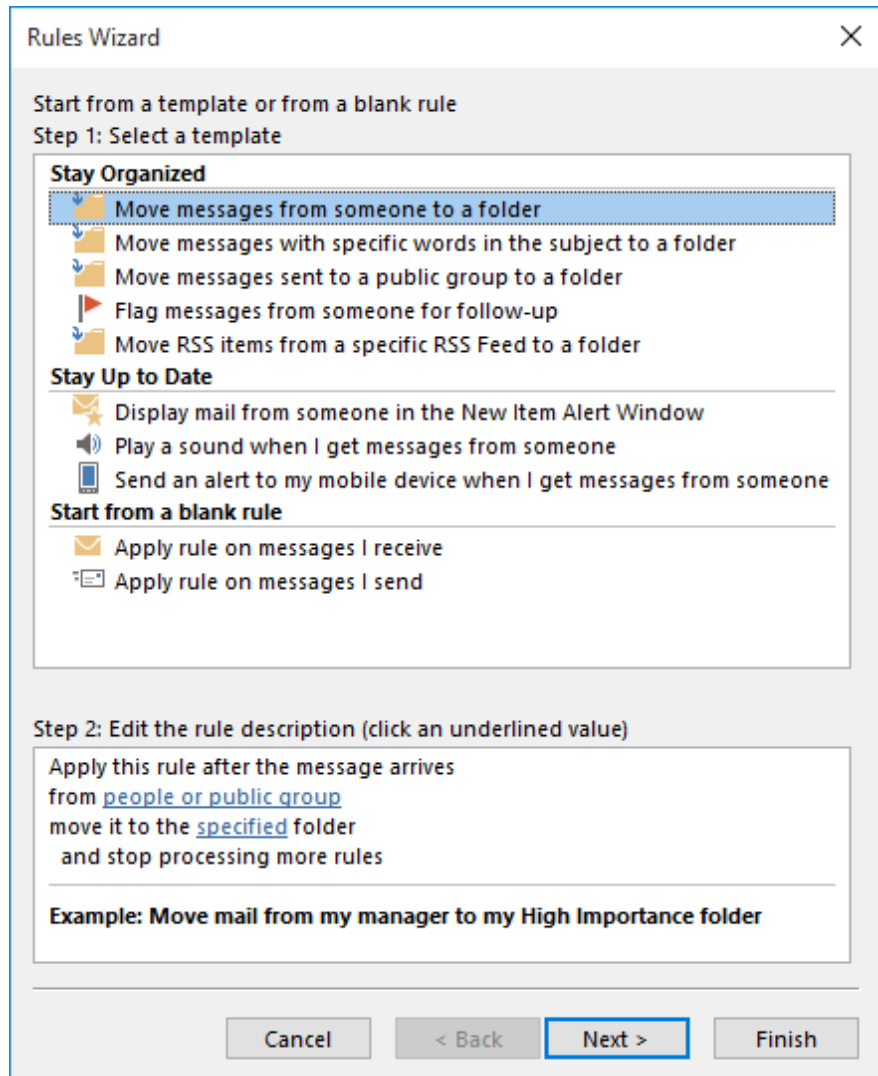
16. Start creating the new rule by clicking Home → Rules → Manage Rules & Alerts:



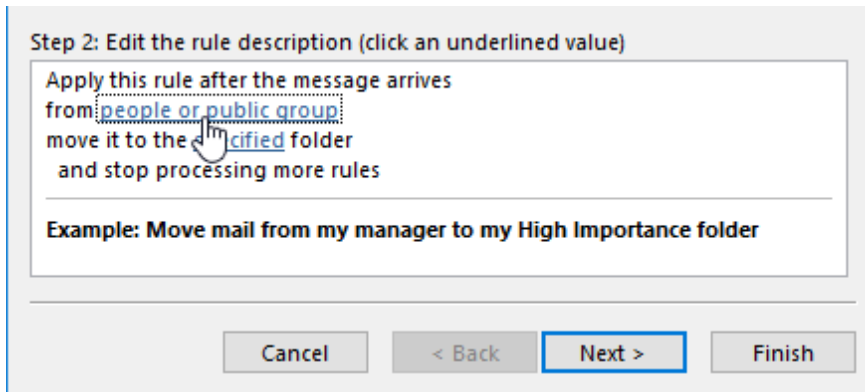
17. The Rules and Alerts dialog box will now be displayed. Near the upper left-hand corner of this dialog, click New Rule:



18. The Rules Wizard will now be displayed. Ensure that the “Move messages from someone to a folder” template is selected:



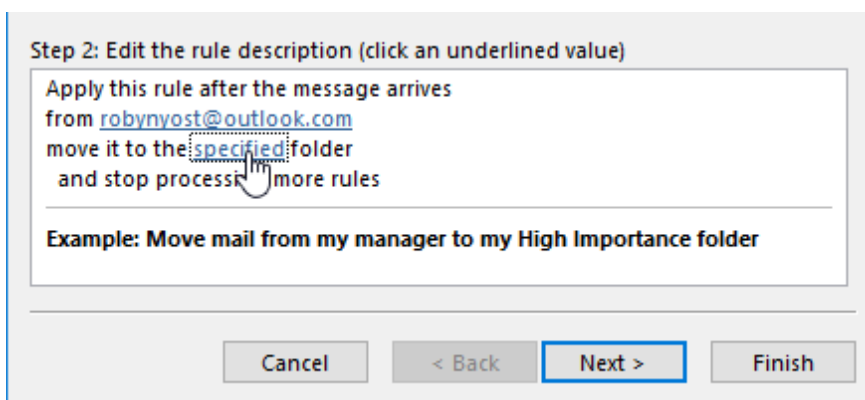
19. Inside the “Step 2” section of this dialog box, click the “people or public group” text:



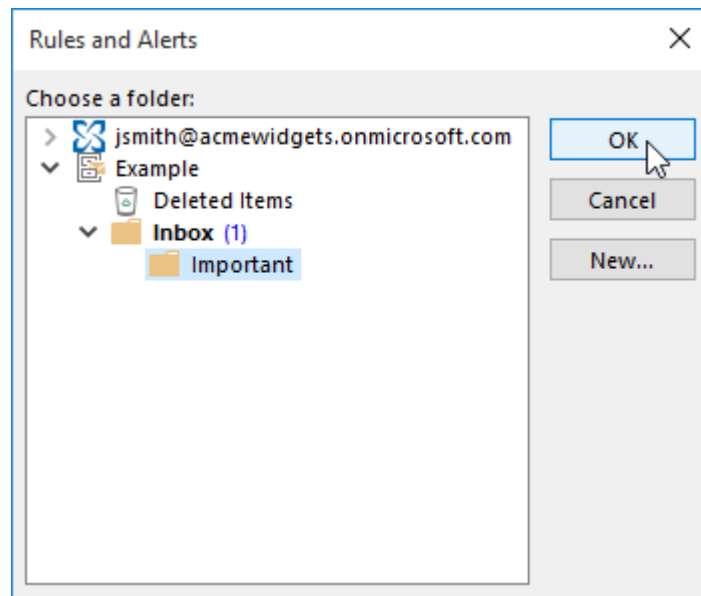
20. This action will show the Rule Address dialog box. Type “robynyost@outlook.com” into the From text box. Click OK:



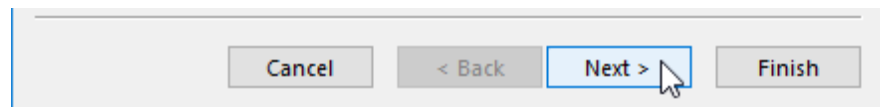
21. Returning to the Rules Wizard dialog box, click the blue “specified” text in the “Step 2” section:



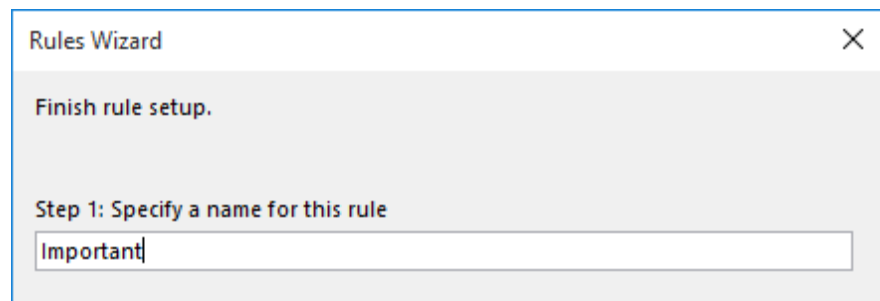
22. A dialog will now be displayed that you can use to choose the folder that you would like messages from the specified e-mail address to be moved to. For this example, choose the Important folder that you just created. Click OK:



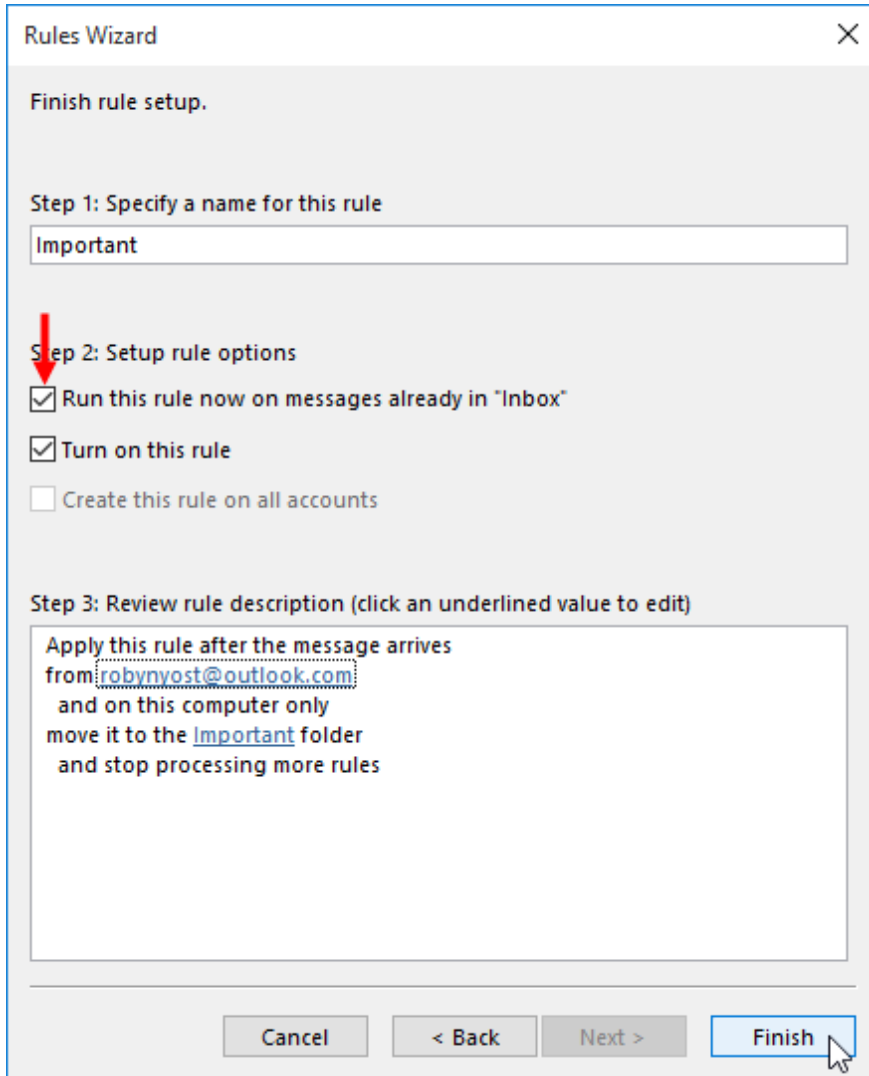
23. In the bottom of the Rules Wizard, click Next four times:



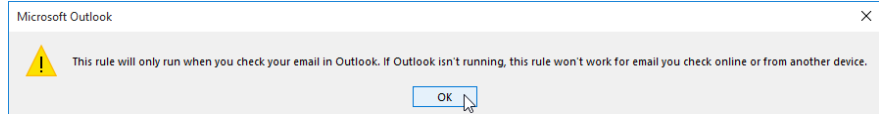
24. Now that you have reached the end of the wizard, you can give this new rule a name as well as set other options. In the top-most text box, type "Important:"



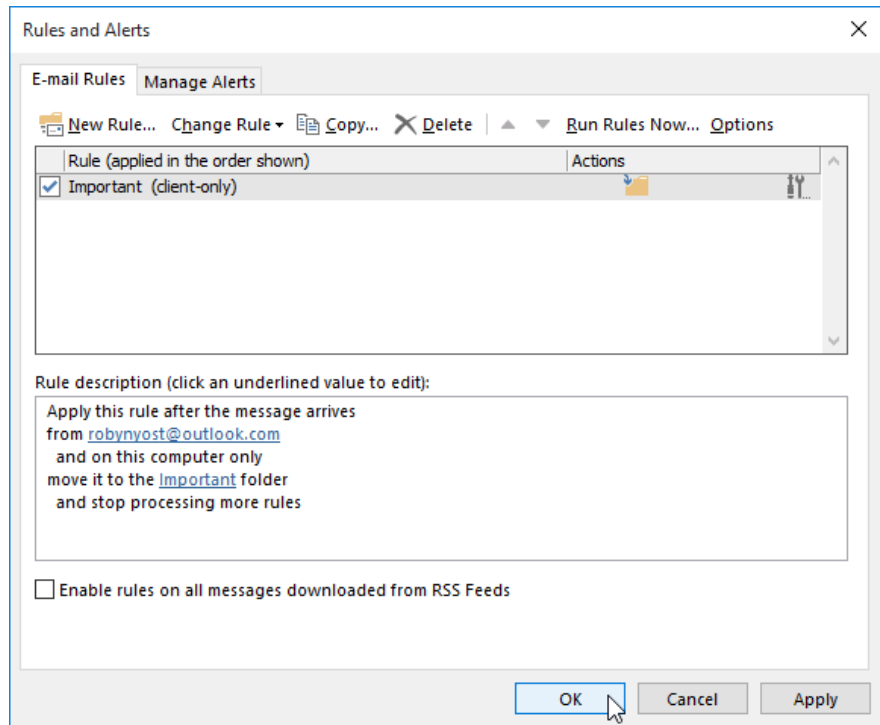
25. Ensure that the “Run this rule now on messages already in ‘Inbox’” checkbox is checked. Click Finish:



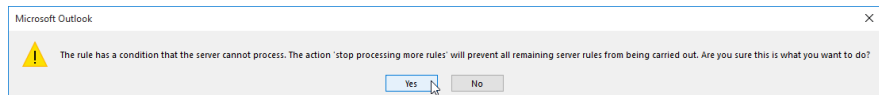
- 26. A warning dialog box will be displayed that warns you this rule will only run when you check your e-mail in Outlook. If Outlook isn't running, this rule will not work for e-mail that you check online or using another device. Click OK to continue:



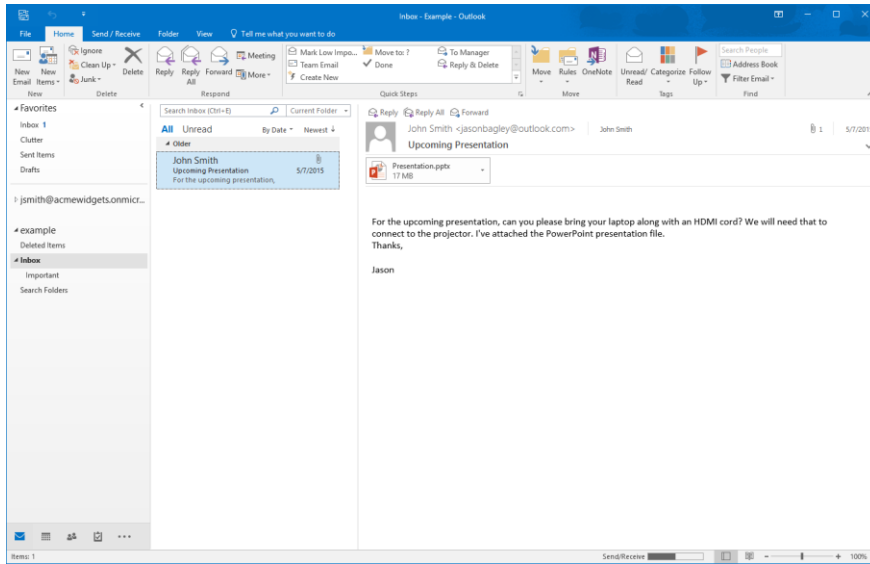
- 27. Returning to the Rules and Alerts dialog box, you will see the new rule listed. Click OK:



- 28. A dialog box may be displayed that will indicate that the rule that was created includes a "stop processing more rules" action that will prevent other rules from being completed. Click Yes:



29. Returning to the Outlook window, you will see that all of the messages from “robynyost@outlook.com” have automatically been moved to the Important subfolder:



30. Close Microsoft Outlook 2016.

TOPIC D: Search Messages

While keeping your messages organized is important, it is also equally important to know how to find messages using the search tools that are available to you. Over the course of this topic, you will learn how to use Outlook's search tools to find specific items.

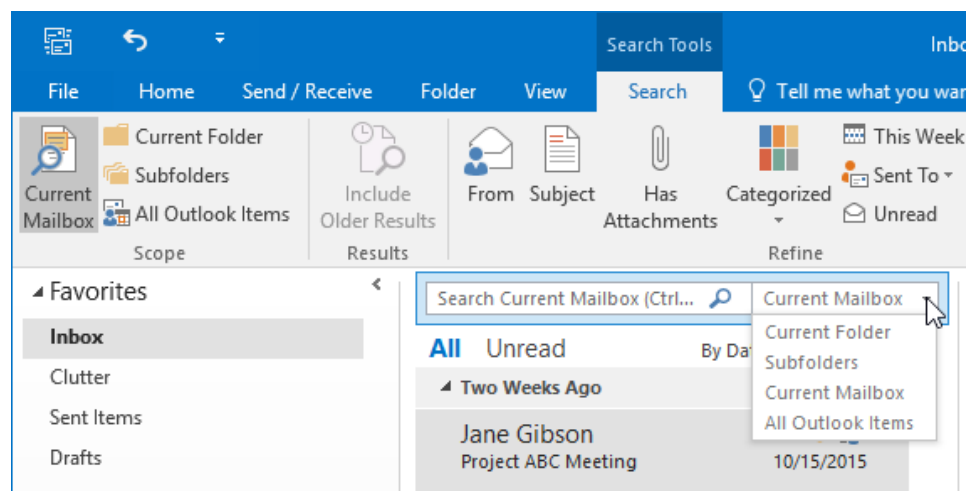
Topic Objectives

In this topic, you will learn:

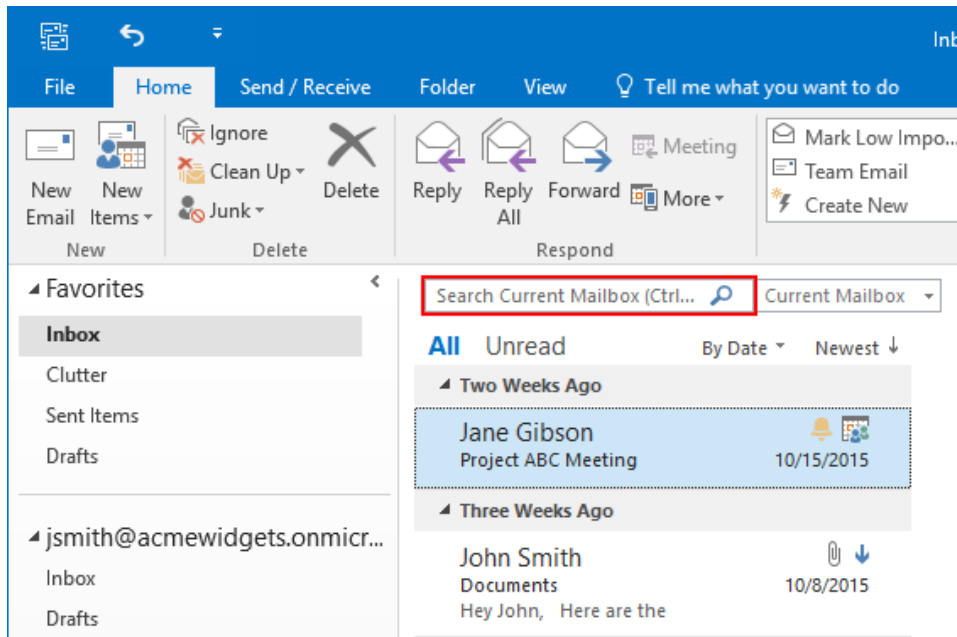
- About instant search
- About the Search Tools contextual tab
- About the Advanced Find dialog box
- About search options
- About search folders
- About custom search folders

INSTANT SEARCH

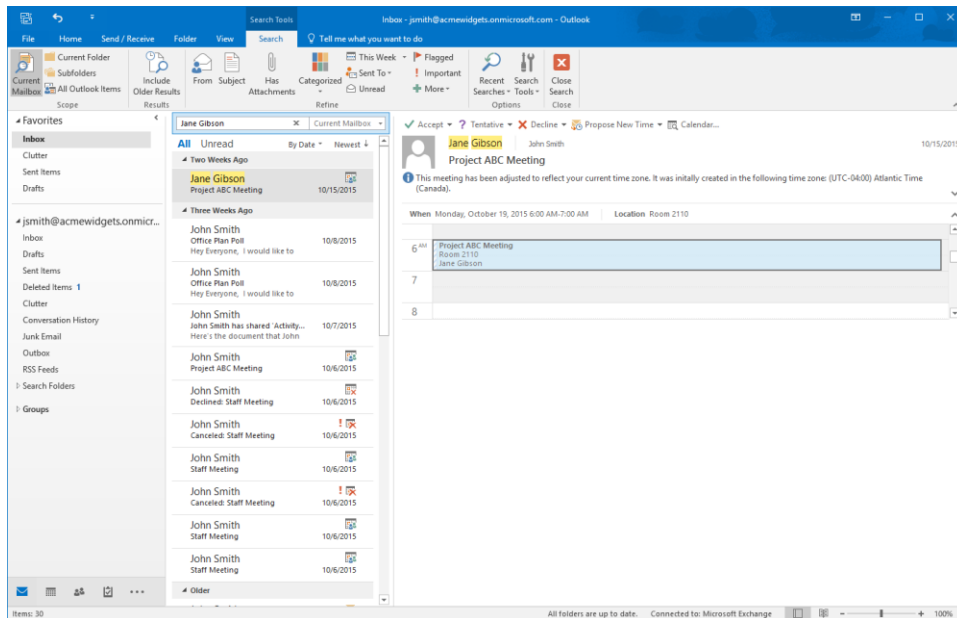
Outlook 2016 provides you with **instant search**, a feature that is used to quickly and easily search through all of the Outlook items in the current mailbox. You can narrow down the scope of the search by clicking the drop-down menu that is adjacent to the **Instant Search Bar** and clicking on one of the options listed:



To execute a search, type search keywords into the **Instant Search bar** at the top of the items list:



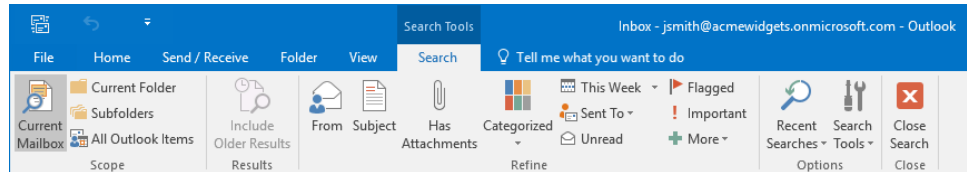
Outlook will then search as you type your keyword(s) and the results will be displayed in the items list:



Note that the terms you search for will be highlighted in the message within the relevant results.

THE SEARCH TOOLS CONTEXTUAL TAB

When you perform a search, the **Search Tools – Search** contextual tab will be displayed on the ribbon:



Let's review its options.

Scope Group

Here, you can choose to search in:

- The current mailbox (default)
- The current folder
- All subfolders
- All Outlook items

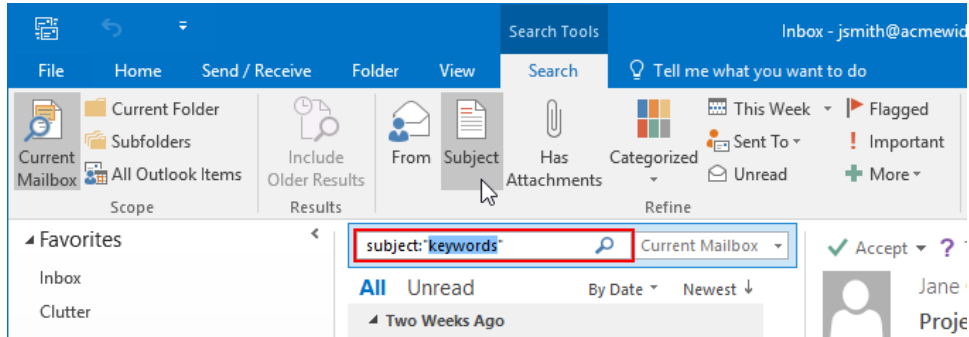
These buttons are toggles, meaning that they can be clicked on or off to view different search results. Toggling some options may un-toggle others; for example, you can't search in the Current Mailbox and the Current Folder at the same time.

Results Group

The results group contains only the **Include Older Results** command. Toggling this command will remove the limit on the number of results for the current search. Keep in mind that this might slow down the search processing time.

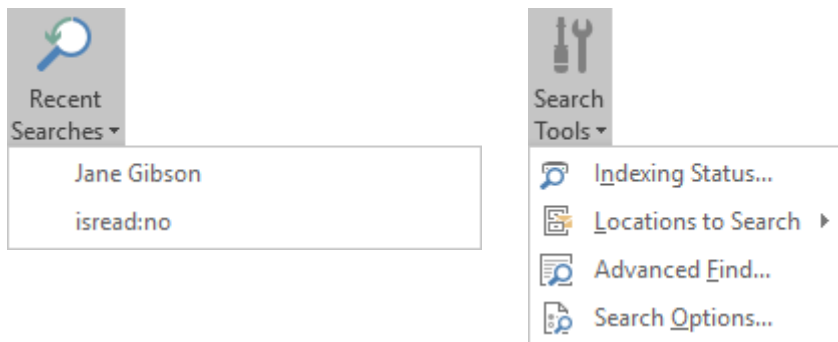
Refine Group

In addition to search terms, you can add lots of additional criteria to your search using the commands in this group. For example, here we clicked Subject and are now prompted to add keywords relating to that criteria:



Options Group

Here you can access recent searches or view advanced search tools:



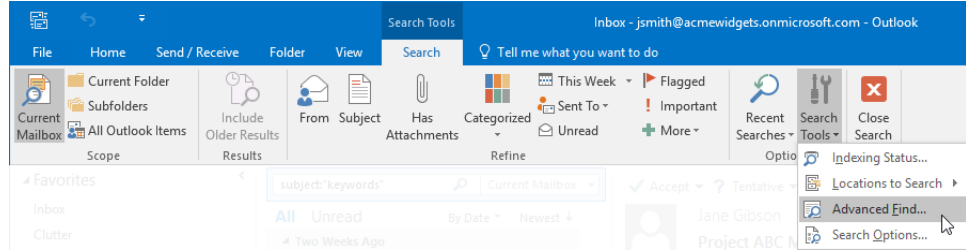
Close Group

Close the Search Tools contextual tab and clear the search.

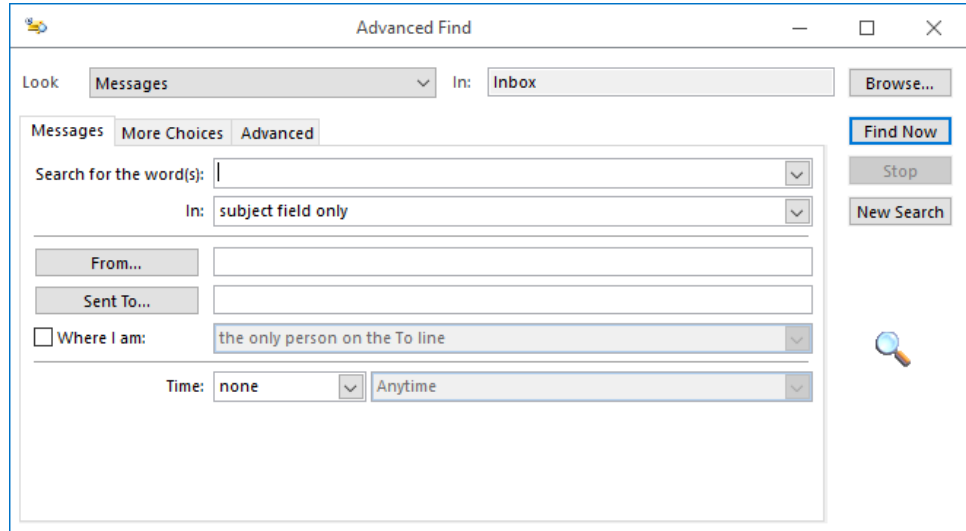
THE ADVANCED FIND DIALOG BOX

While the Instant Search tool is a quick solution for finding items using simple keywords, the **Advanced Find** tool allows you to search for items using a much wider set of criteria.

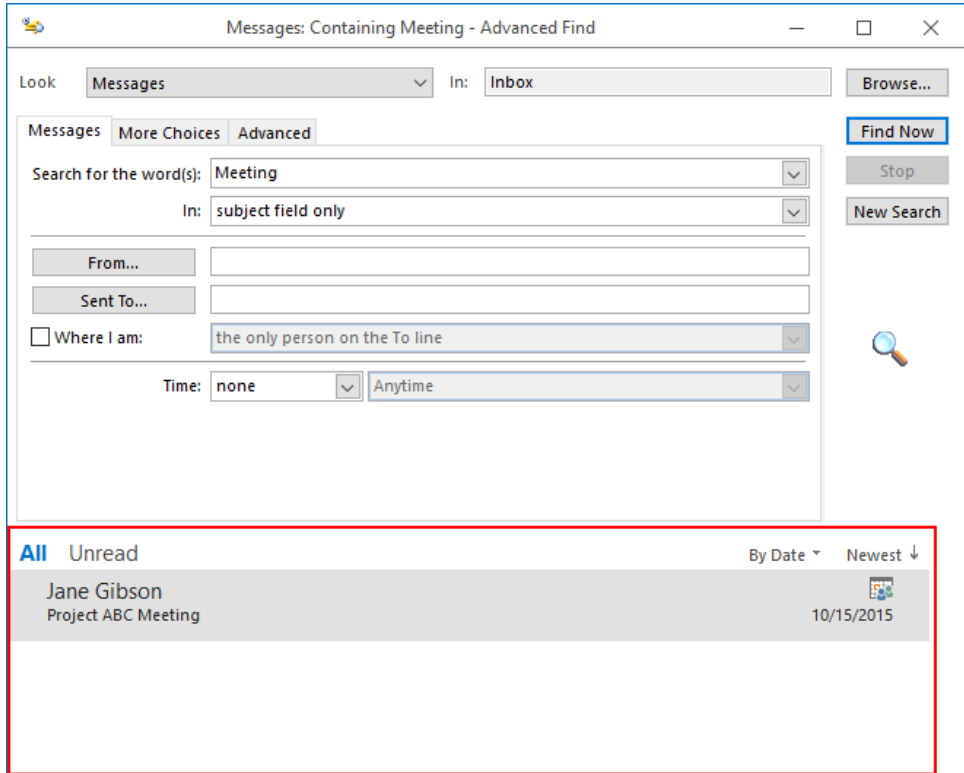
To use this tool, you first need to open the **Advanced Find dialog box**. To begin, click inside the Instant Search text box to display the Search Tools – Search contextual tab. Next, click Search Tools – Search → Search Tools → Advanced Find:



Once open, you will see that the Advanced Find dialog box includes many different types of criteria that you can use to help you find the item that you are looking for:



Any items that are returned by a search using the Advanced Find dialog box are listed directly inside the dialog box in the results pane. This section will automatically expand from the bottom of the dialog box whenever a new search is executed:



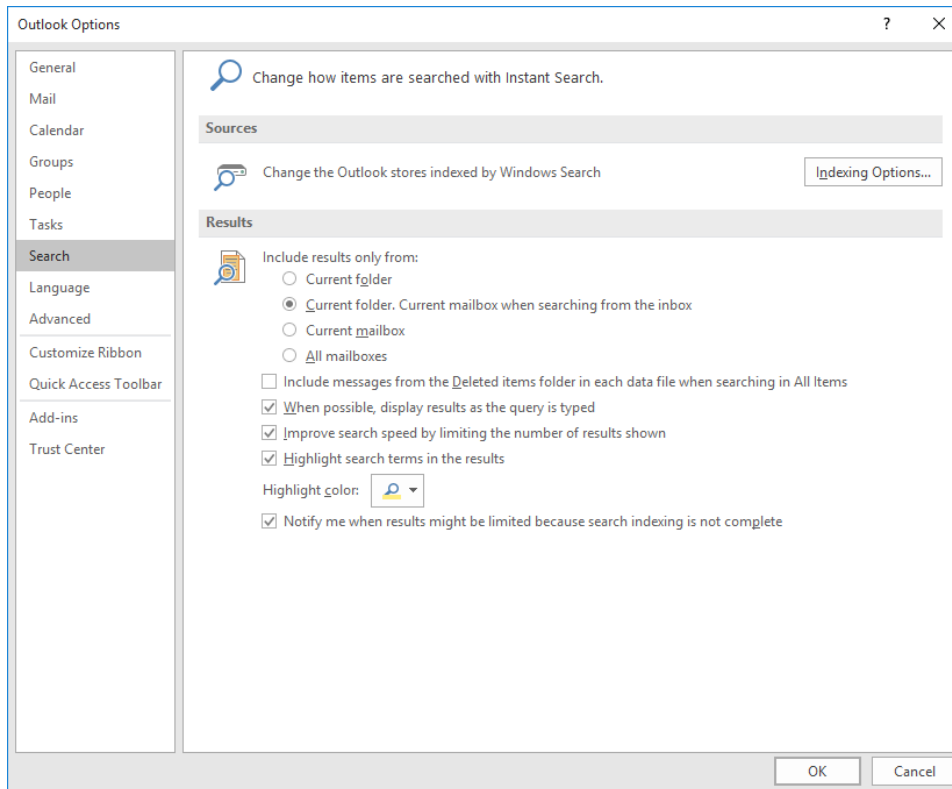
Components of the Advanced Find Dialog Box

The Advanced Find dialog box contains many different components that allow you to add different criteria to your search. Below is a brief breakdown of some of those components:

- **Look for drop-down menu:** Choose the type of object that you would like to look for. While it is set to **Messages** by default, you can also change it to look for appointments and meetings, contacts, files (Outlook and Exchange), notes, and tasks. You can also set it to search for any type of Outlook item if you are unsure of the type of the object that you are looking for.
- **In field/Browse button:** These controls are used to specify the location or folder in which you would like to search. The In field will display the location, while the Browse button allows you to select a different one.
- **Messages tab:** The controls in this tab are used to set basic search criteria such as keywords, location, sender and recipient information, and even time ranges.
- **More Choices tab:** The controls in this tab include more specific criteria that allow you to narrow down your search results even further. For example, this tab allows you to set criteria such as color category, attachments, status, and more.
- **Advanced tab:** The controls in this tab are used to narrow down your results based on criteria that relate to a selected field.
- **Find Now button:** Clicking this button will execute a search using the criteria that you set.
- **New Search button:** Clicking this button will clear any information that you entered into the Advanced Find dialog box and allow you to start a new search from scratch. If the results pane is displayed, it will close when this button is clicked.
- **Results pane:** The results pane will automatically expand from the bottom of the Advanced Find dialog box when a new search is executed. This pane will list all of the results that the search has found.

SEARCH OPTIONS

To configure how the search feature behaves in Outlook, you first need to open Outlook Options dialog by clicking File → Options. Next, click the Search category:



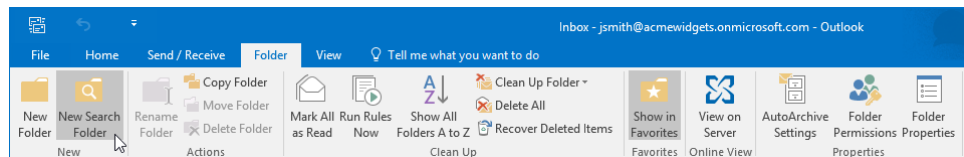
Inside the Sources group you can find the Indexing Options button. Clicking this button will open the Indexing Options dialog box where you can choose how Outlook items are indexed by Windows Search.

The Results section includes a variety of different controls. At the top, you can choose from where you would like to include search results by default. Lower you can find check boxes that can be used to include messages from the “Deleted items” folder, display results as the query is typed, improve search speed by limiting results, highlight search terms in the results, and notify you when results are limited because indexing is incomplete.

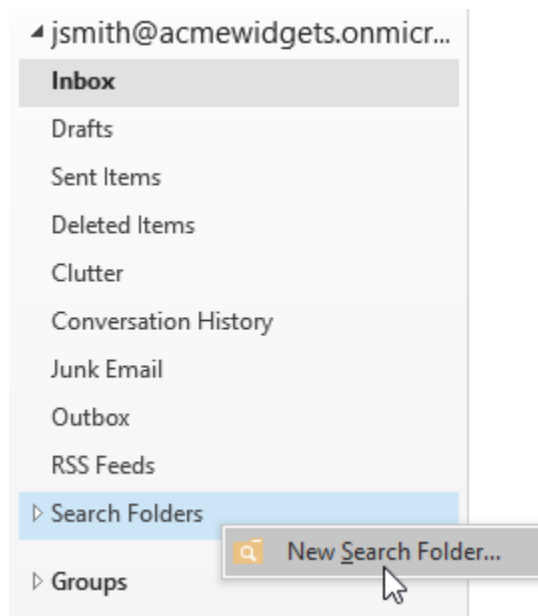
SEARCH FOLDERS

Despite their name, **search folders** do not actually store objects. Rather, they are virtual folders that are used to display items from your mailbox that match a specific criteria. Any items that are displayed in a search folder are still stored in their original locations. In this way, search folders act as a quick and easy way to find objects based on a set of criteria that you look for on a frequent basis.

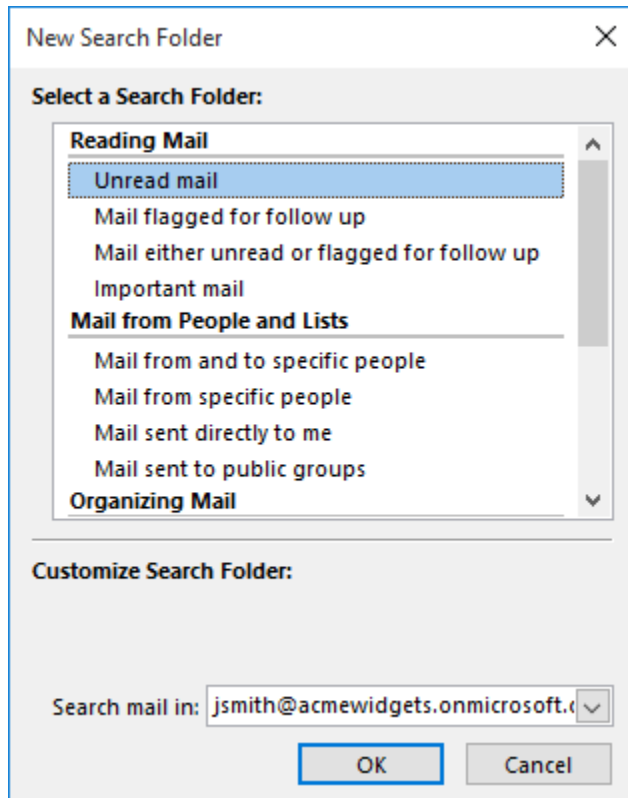
While there are no search folders shown inside your mailbox by default, you can add search folders that have already been created for you. To do this, click Folder → New Search Folder:



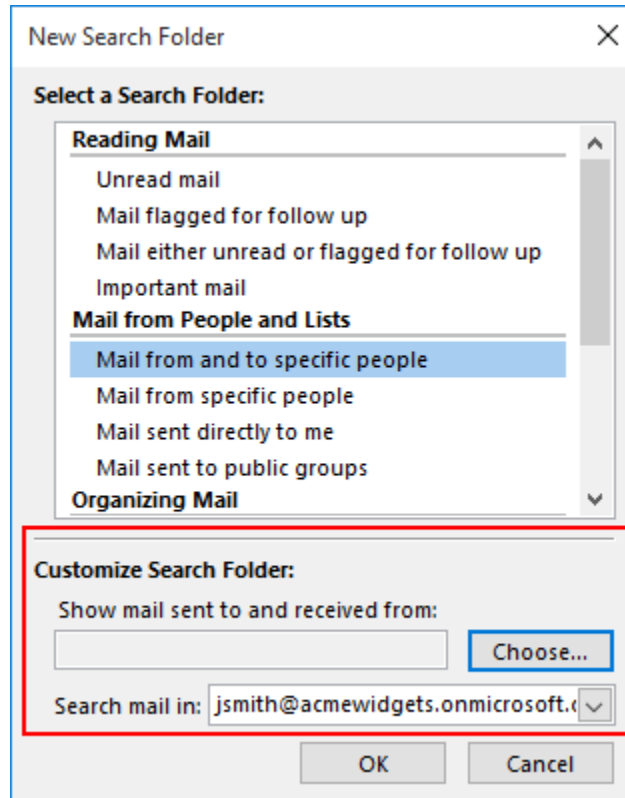
Or, right-click the Search Folders entry in the Navigation Pane and click New Search Folder:



When you perform either of these actions, the New Search Folder dialog box will appear:

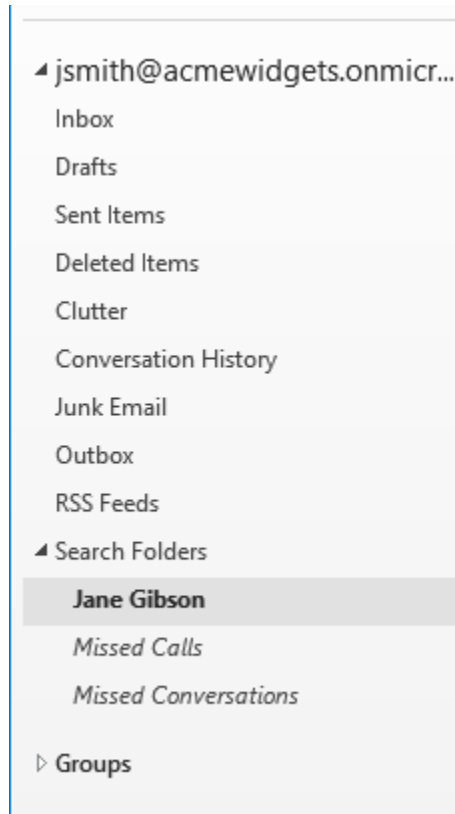


This dialog box includes three separate categories of default search folders that you can create. By clicking on any one of the templates listed, you can then add criteria to that template using the controls in the Customize Search Folder section of the New Search Folder dialog box:

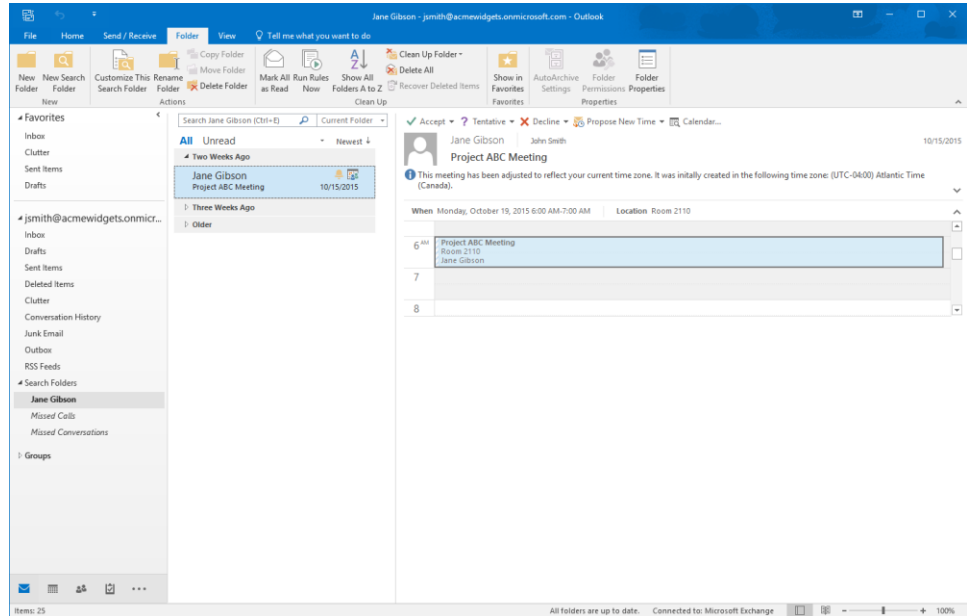


(Note that you can choose which mailbox you would like this new search folder to search through using the “Search mail in” drop-down menu.)

When you are ready, click the OK button to create the new search folder. The folder will then be listed inside the Search Folders item in the Navigation pane:

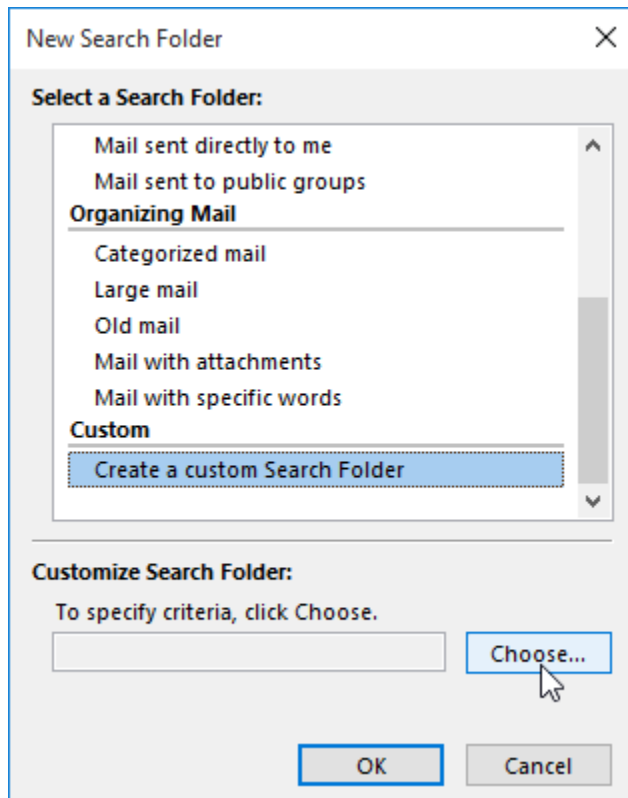


Clicking on the search folder will display its results inside the items list. In this example, only messages received from jgibson@acmewidgets.onmicrosoft.com are shown:

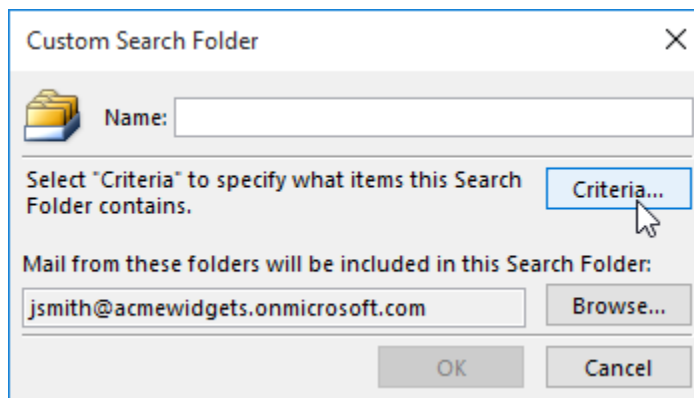


CUSTOM SEARCH FOLDERS

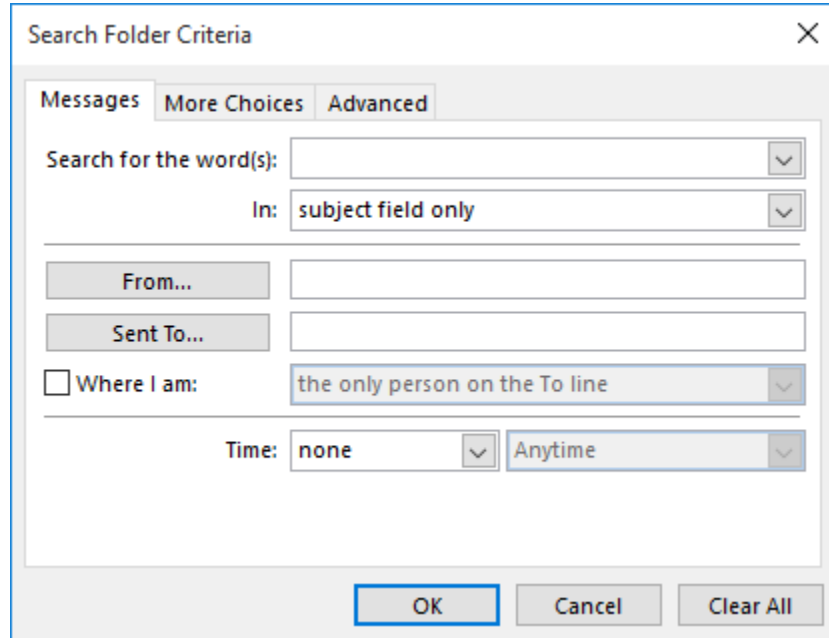
Aside from the default search folders that you can add, you also have the option to create custom search folders. To do this, open the New Search Folder dialog box and select the “Create a custom Search Folder” option. Next, click the Choose button:



When you click Choose, you will be asked to name your rule, configure its criteria, and choose which folders will be included:



Clicking the Criteria button will display the Search Folder Criteria dialog box. This dialog box contains dozens of different options that you can use to add a wide variety of different criteria. You may notice that this dialog box is configured in much the same way as the Advanced Find dialog box:



Once you have chosen the criteria that the new search folder is to look for, click OK to apply the new settings. Next, click OK in both the Custom Search Folder and New Search Folder dialog boxes. The new folder will then appear in the Search Folders list in the Navigation pane.

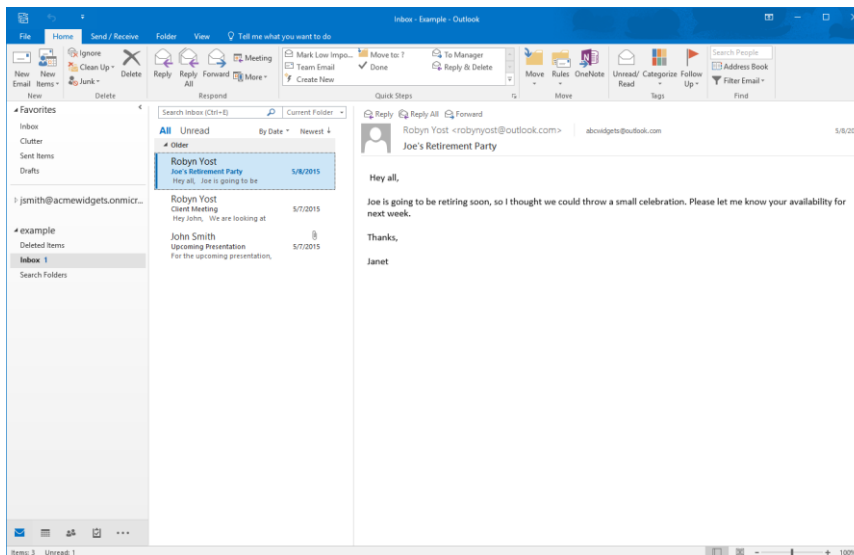
ACTIVITY 2-4

Searching Messages

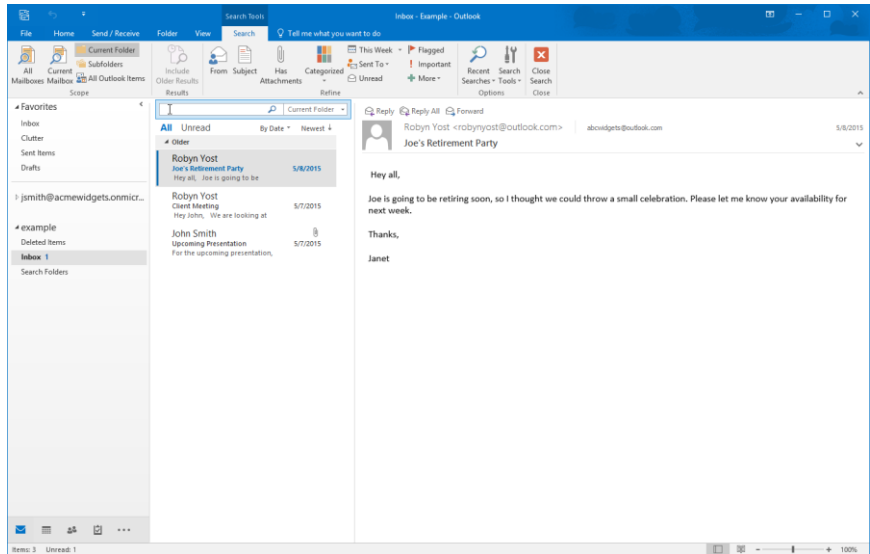
You need to find a message that contains an attachment. As you find yourself doing this often, you would like to create a search folder that will list all messages in your inbox that contain an attachment.

Before students begin, please have them follow these steps to open the Activity 2-4.pst file in their Exercise Files.

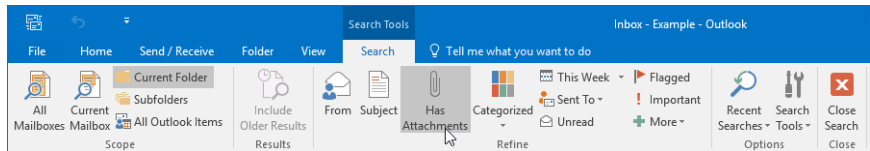
- Click the File menu, click Open & Export, and click Open Outlook Data File.
 - Browse to Activity 2-4.pst in the Exercise Files folder. Click Open.
1. To begin, open Outlook 2016. Ensure that the Inbox for the “example” Outlook data file is displayed:



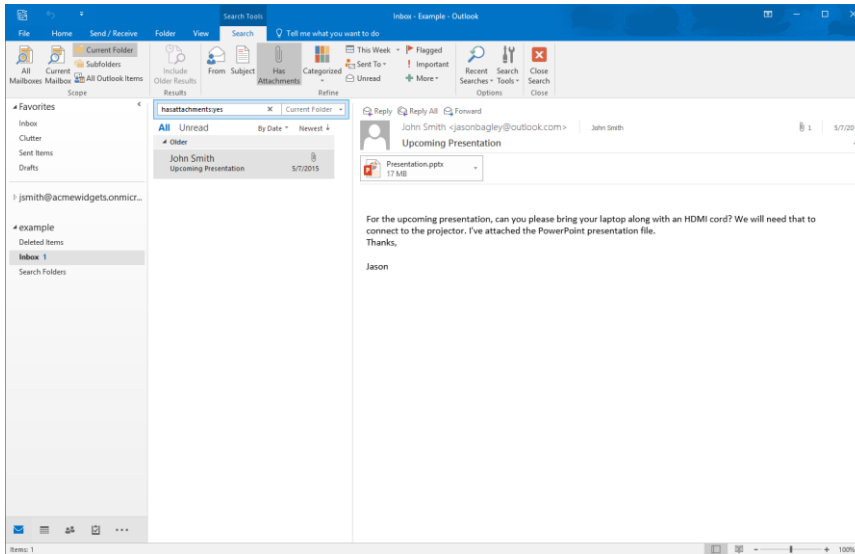
2. Click inside the Instant Search bar at the top of the message list. This will display the Search Tools – Search tab on the ribbon:



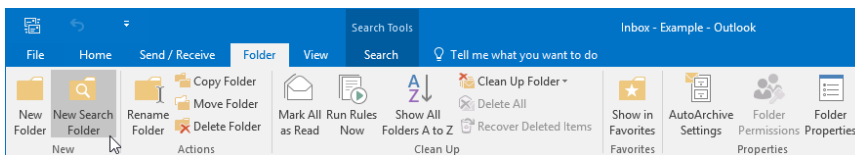
3. As you are looking for a message with an attachment, click Search Tools – Search → Has Attachments:



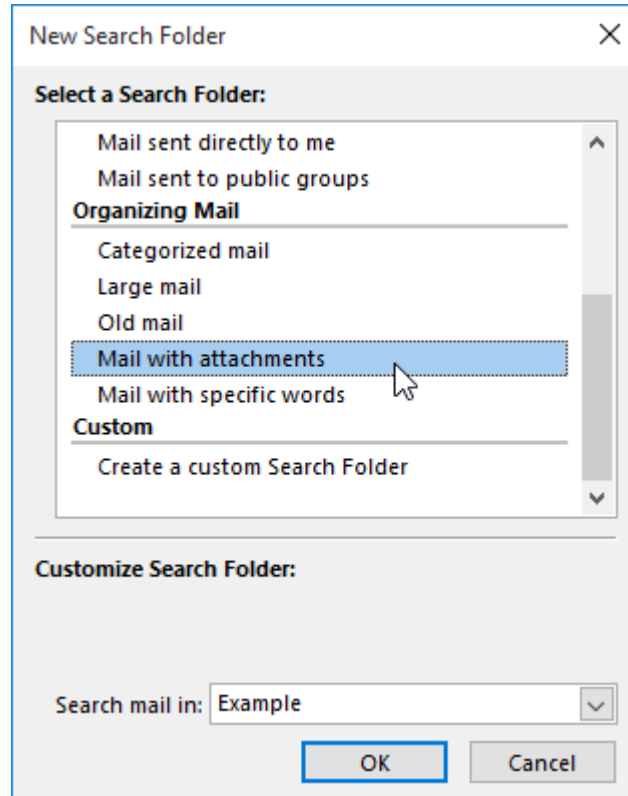
4. Inside the Instant Search bar, you will see that the text “has attachments:yes” has been entered. Any messages in the Inbox that contain an attachment will now be listed:



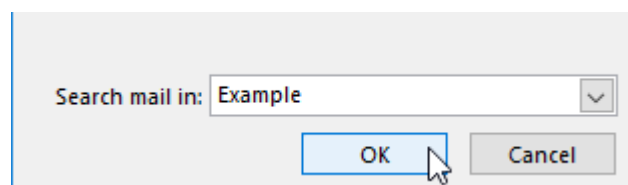
5. As you find yourself tracking down old messages that have important attachments often, you would like to create a search folder that will do all of the work for you. Click Folder → New Search Folder:



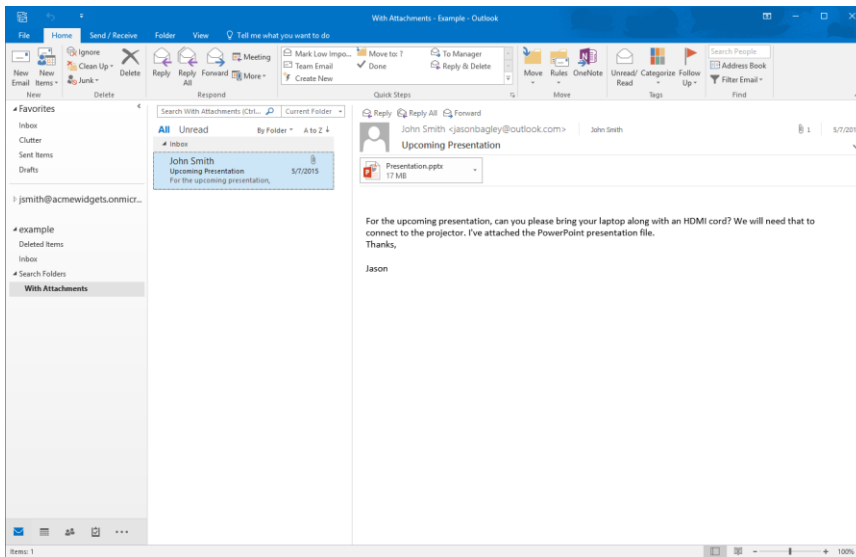
6. The New Search Folder will now be displayed. In the “Select a Search Folder” list box, scroll to the bottom of the list. Click the “Mail with attachments” option to select it:



7. Ensure that the “Search mail in” drop-down menu is set to Example. Click OK:



8. The new search folder will now have been created and it will be listed in the Search Folder list in the Navigation pane. It will automatically be displayed and you will see any messages that contain an attachment:



9. Close Microsoft Outlook 2016 to complete this exercise.

TOPIC E: Manage Junk Mail

Chances are that if you have ever had an e-mail account, you have at one time or another had to deal with junk mail. Outlook is able to handle this type of mail automatically by moving messages that it perceives as being junk to the Junk E-mail folder in your mailbox. This way you don't have junk mail cluttering up your inbox, but you still have access to those messages if required. Over the course of this topic, you will learn about junk mail and the different ways that you can manage it.

Topic Objectives

In this topic, you will learn:

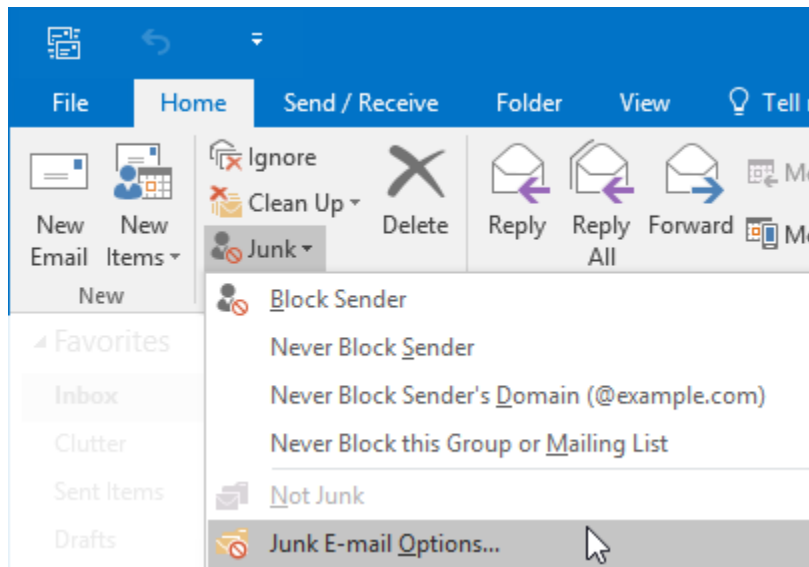
- About spam
- About the junk e-mail filter
- How to use the Not Junk option
- About the Safe Senders and Blocked Senders lists

SPAM

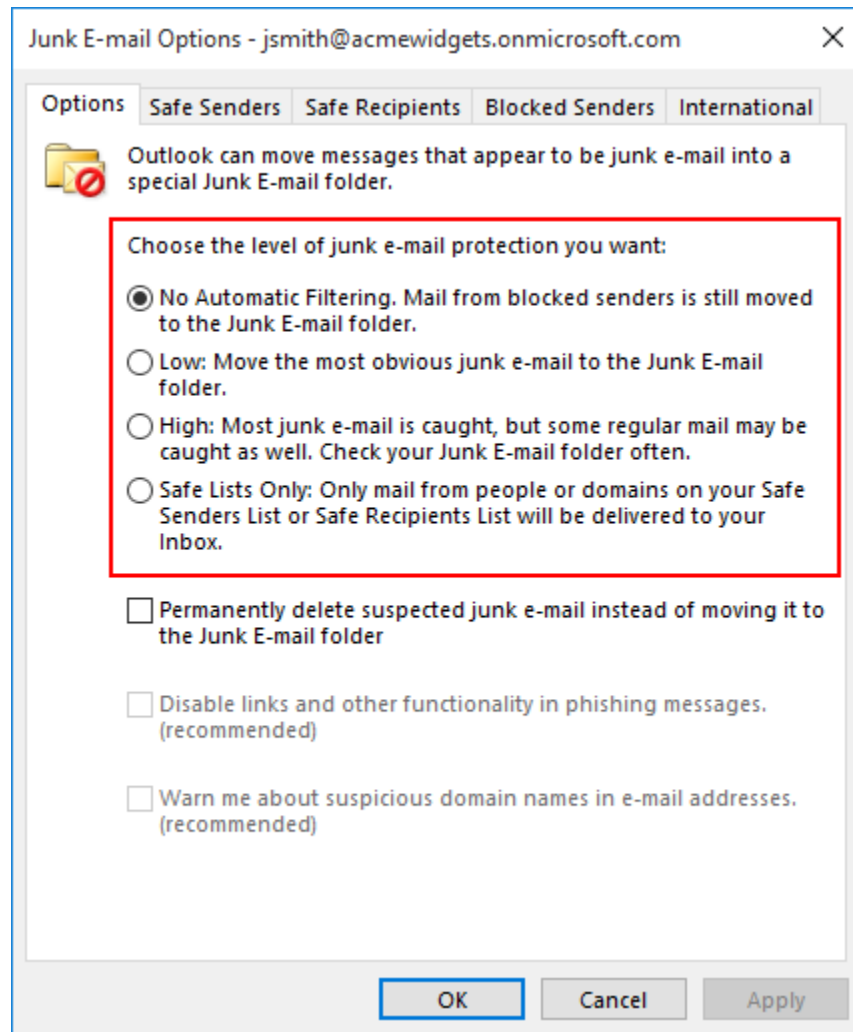
One not-so-great thing that happens after you've been using e-mail for a while is **spam**. Like that stack of flyers and "great offers" you find in your postal mailbox, spam is usually advertisements or possibly even scams and other malicious messages. Spam is also referred to as junk mail, or in Outlook's case, **junk e-mail**.

JUNK E-MAIL FILTER

The **junk e-mail filter** is used by Outlook to control what messages are placed in the Inbox and what messages are placed in the Junk E-mail folder. You can control how strict this filter is by adjusting its settings. To do this, click Home → Junk → Junk E-mail Options:



This action will display the Junk E-mail Options dialog box. Here, you can choose between several different levels of protection that you would like to apply to your mailbox:



By default, Outlook chooses the **No Automatic Filtering** level for you. This option turns off the junk e-mail filter completely. This is typically because you are using an Office 365 account or something similar where junk e-mail is handled by the mail server. All messages except those on the Blocked Senders list will be moved to your inbox. **Low** will move any e-mail that's obviously junk to the Junk E-mail folder. If you choose the **High** level, you risk some of your wanted e-mail going to the Junk E-mail folder, but you have less of a chance of encountering spam in your inbox. The **Safe Lists Only** option is also available, but it is very restrictive. Choosing this option will put all e-mail in the Junk E-mail folder, except for messages from people that are on your Safe Senders list. (This will be discussed later in this topic.)

Lower in this dialog box, there are a few options to customize the currently applied junk e-mail filter level:

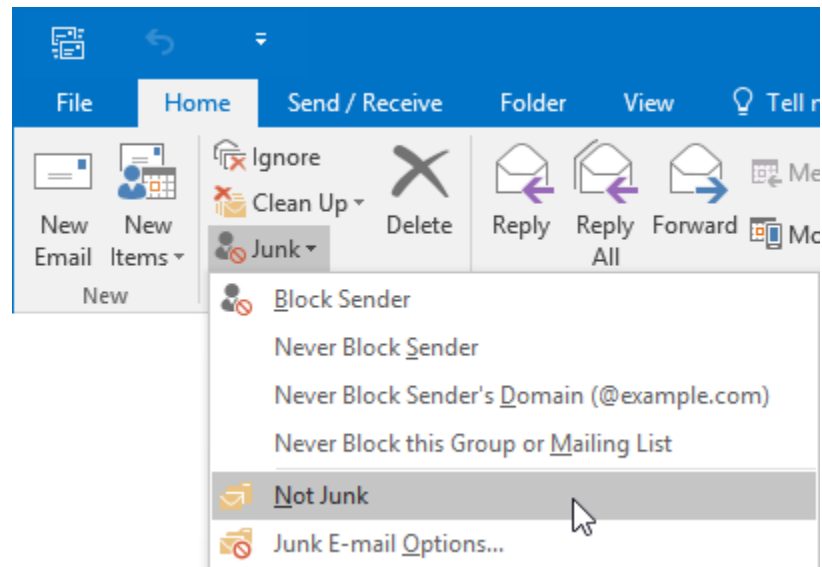
- Permanently delete suspected junk e-mail instead of moving it to the Junk E-mail folder
- Disable links and other functionality in phishing messages. (recommended)
- Warn me about suspicious domain names in e-mail addresses. (recommended)

(Note that these options are not available when no automatic junk e-mail filtering has been applied.)

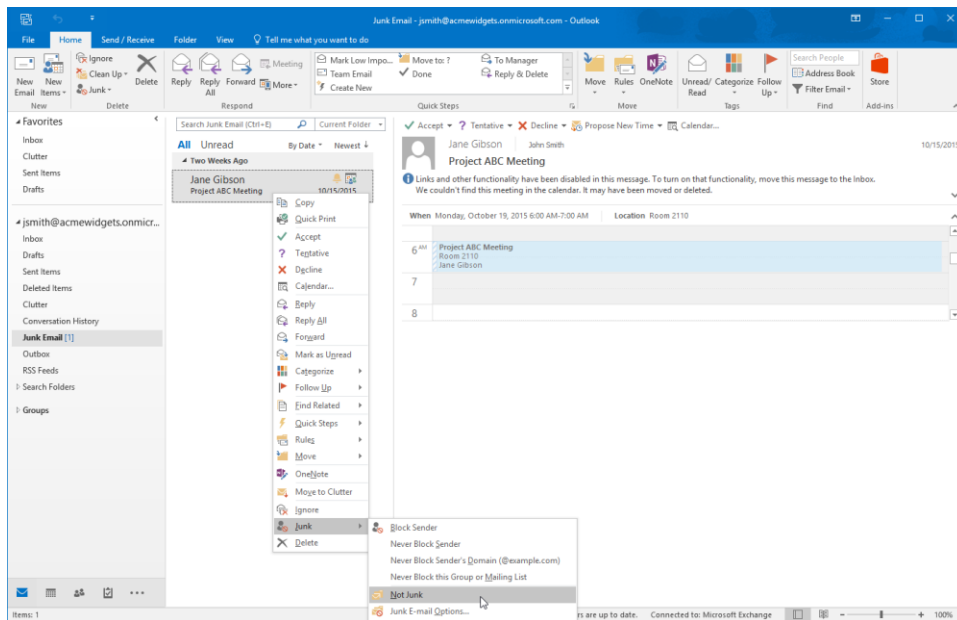
The first option tells Outlook to delete anything it thinks is junk e-mail. This option is not recommended because Outlook isn't perfect; there are times it will mark an e-mail as junk when it's really something you want to read. If you have this option turned on, the e-mail will just be deleted and you won't have the option to retrieve it from the Junk E-mail folder. The remaining two options will be enabled by default and protect you against messages that may be trying to steal your information and/or login credentials by masquerading as an e-mail from a legitimate organization (like your bank). It is recommended that you leave these settings unchanged from the defaults.

THE NOT JUNK OPTION

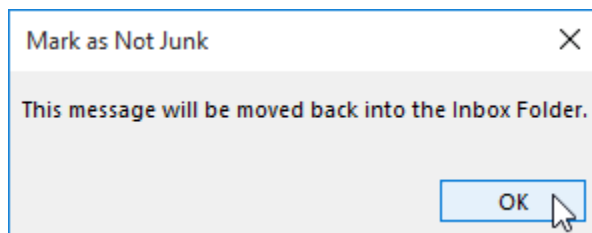
If you display the Junk E-mail folder and find a message that is not junk e-mail and has been filtered incorrectly, you should mark it as not junk. To do this, select the message in question and then click Home → Junk → Not Junk:



Or, you can right-click directly on the message and click Junk → Not Junk:



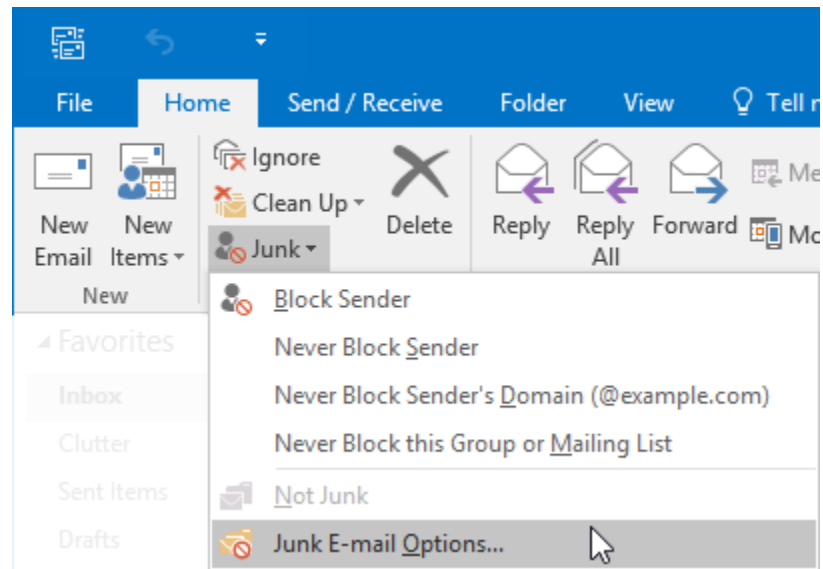
In either case, a dialog box will be displayed that indicates that the message will be moved back into the Inbox folder. Click OK to continue and complete the process:



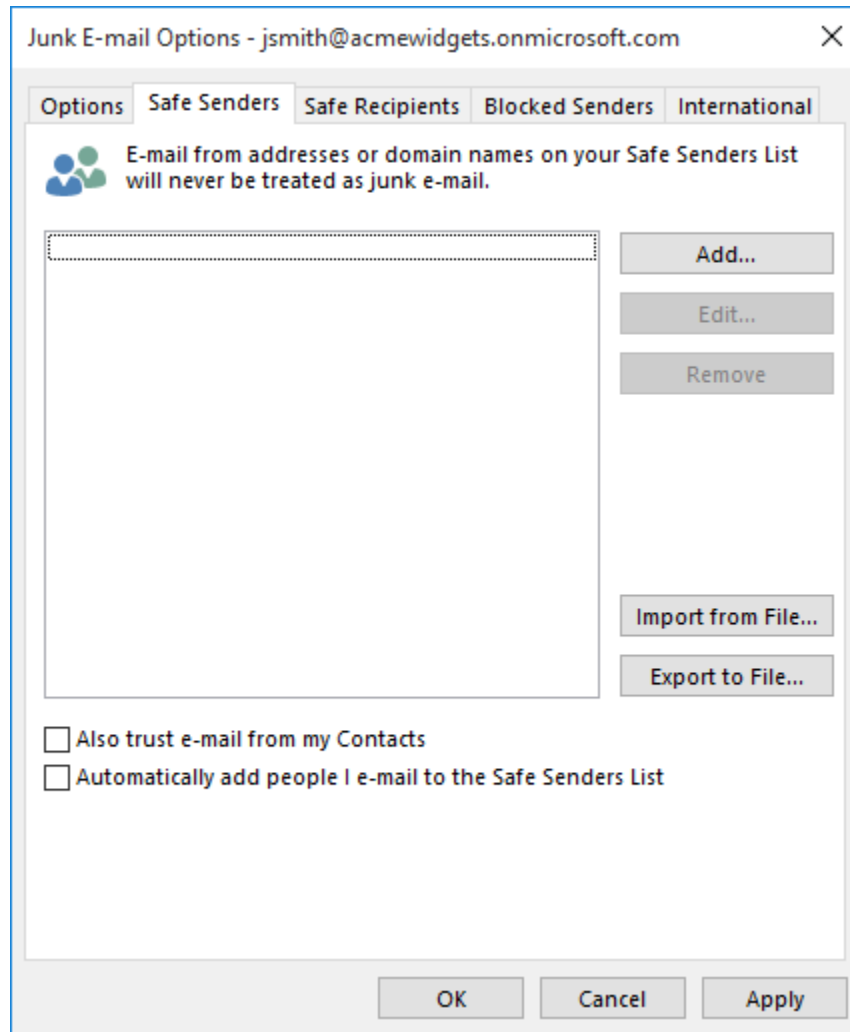
SAFE SENDERS LIST

The **Safe Senders list** stores e-mail addresses and domain names that you explicitly trust. This means that any e-mail that is received from the addresses or domains in this list will always be filtered into the inbox.

To modify this list, click Home → Junk → Junk E-mail Options:



This action will open the Junk E-mail Options dialog. Click the Safe Senders tab to display the appropriate list:



Adding someone to this list means that their e-mail will never be treated as junk, nor will Automatic Download or phishing settings apply to them. To add a new domain or e-mail address to this list, click the Add button.

You can also use the bottom two checkbox controls to make your contacts safe senders and add people that you send e-mail to, to the Safe Senders list.

Safe Recipients List

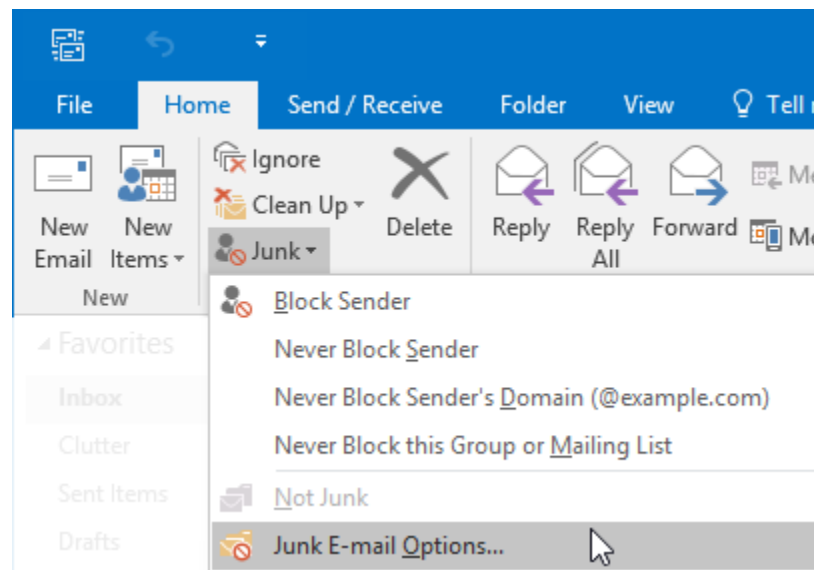
If you belong to mailing lists or distribution lists, you may often receive e-mail from them that is intended for you, but has a different recipient address from yours (such as the list address). To prevent e-mail such as this from being filtered into the Junk E-mail folder, you can add the list

address to the Safe Recipients list. This is done using the Add command in the Safe Recipients tab of the Junk E-mail Options dialog box.

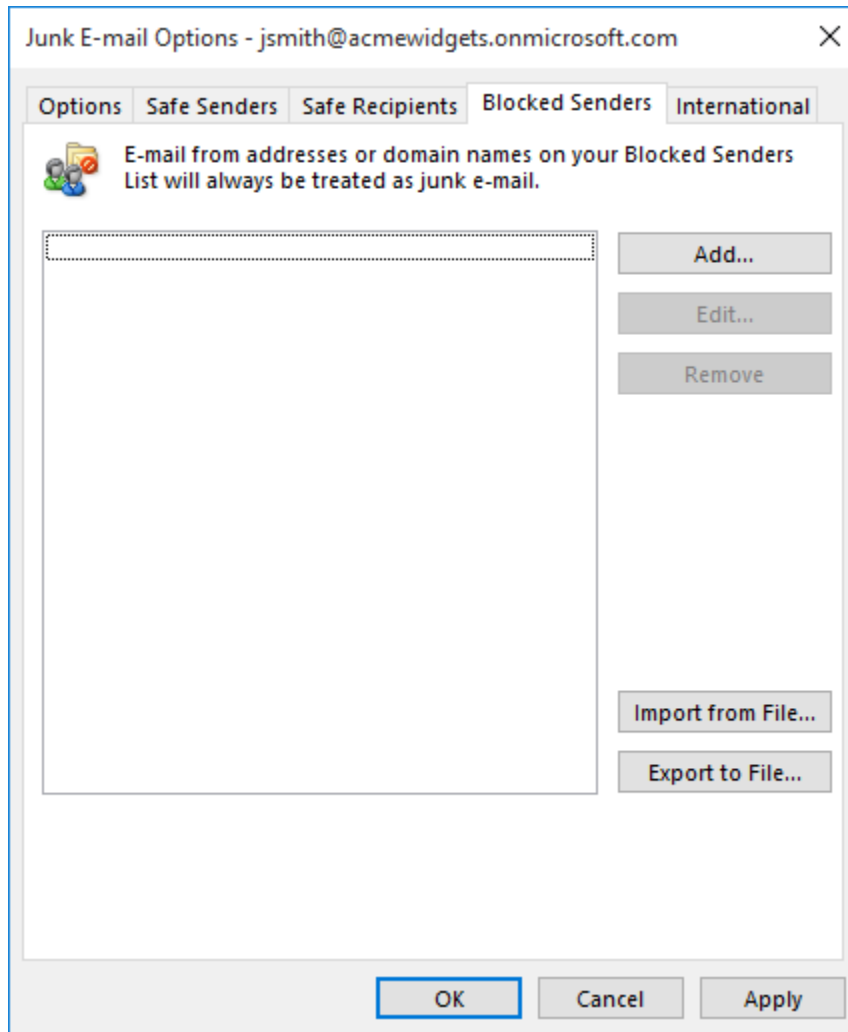
BLOCKED SENDERS LIST

The **Blocked Senders list** operates using the same concept as the Safe Senders list, but instead blocks e-mail from reaching your inbox. If you receive an e-mail from a domain or e-mail that is in this list, it will automatically be moved directly to the Junk E-mail folder.

To set options for this list, click Home → Junk → Junk E-mail Options:



This will open the Junk E-mail Options dialog. Click the Blocked Senders tab to display the appropriate list:



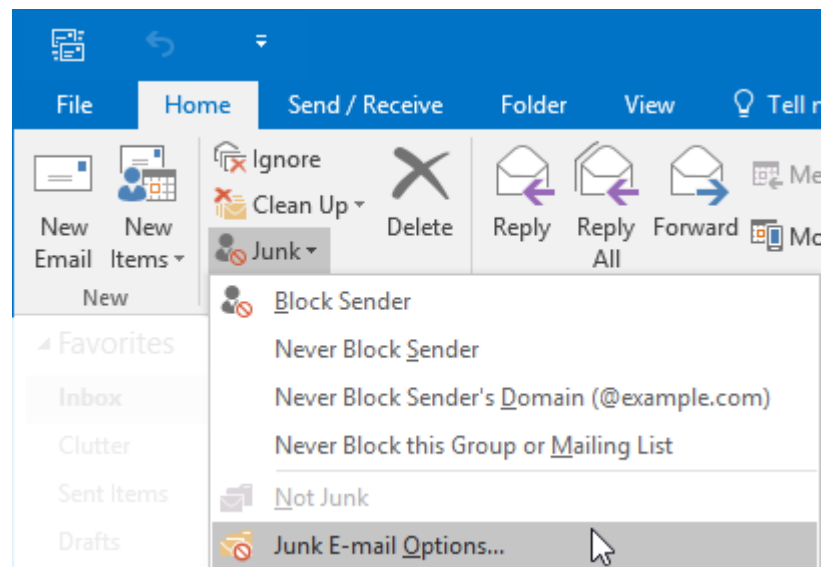
As you can see, the Blocked Senders tab looks similar to the Safe Senders tab. However, any addresses and domains added to this list will always be marked as junk e-mail, even if the junk mail filter is turned off. Like the Safe Senders tab, click the Add button to add blocked senders. You can add specific addresses, such as john@example.org, or just a domain, like example.org.

ACTIVITY 2-5

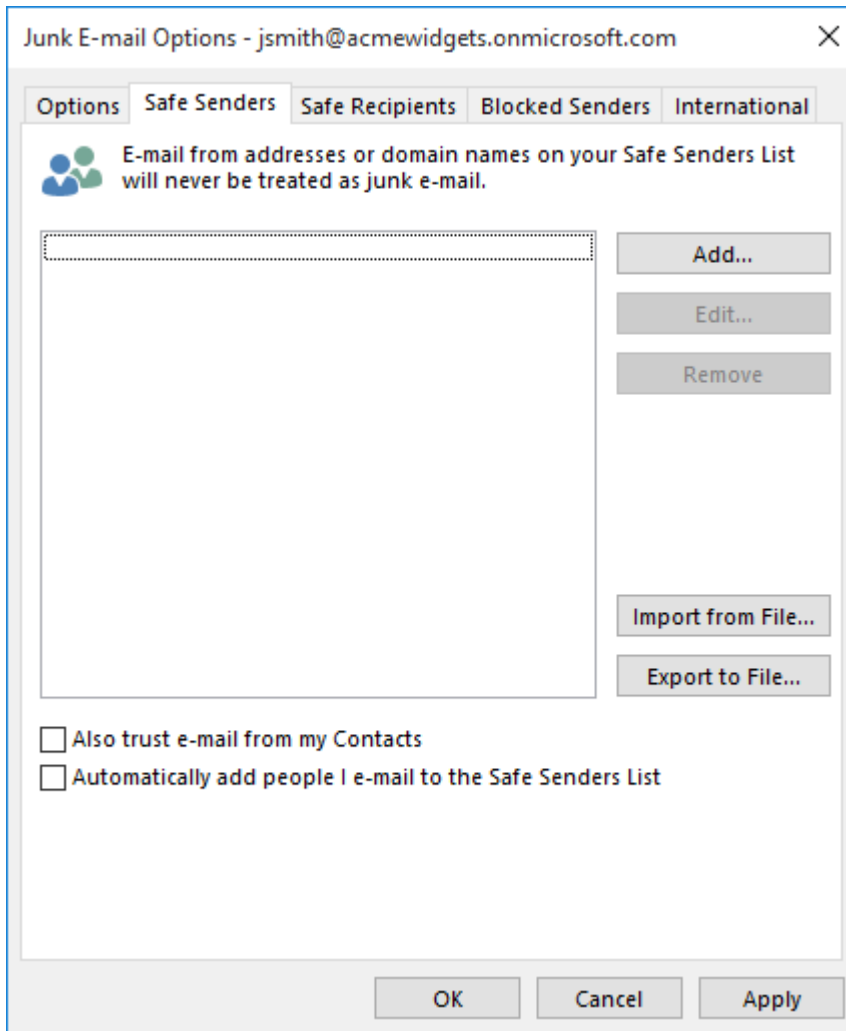
Managing Junk Mail

While the junk filtering works most of the time, you have found that messages from a coworker seem to be filtered into the Junk E-mail folder frequently. Additionally, you keep getting e-mail from a newsletter that you unsubscribed from. You are going to use Outlook's junk mail filtering capabilities to solve both of these problems.

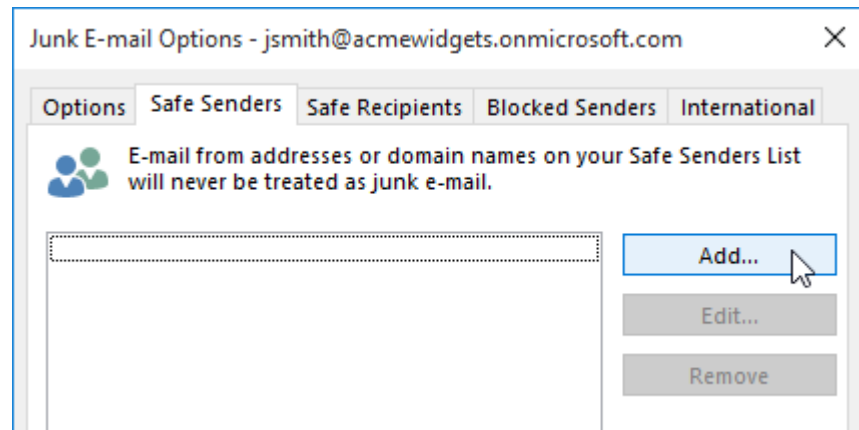
1. To begin, open Outlook 2016.
2. Open the Junk E-mail Options dialog box by clicking Home → Junk → Junk E-mail Options:



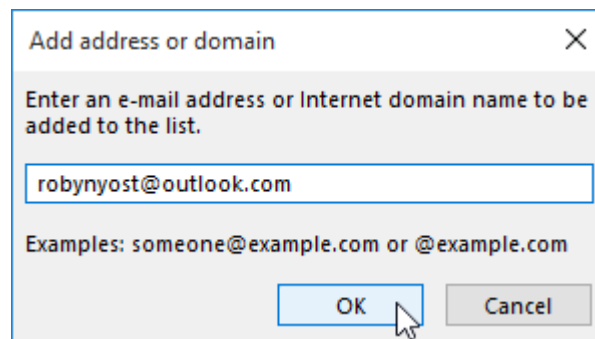
3. With the Junk E-mail Options dialog box displayed, click the Safe Senders tab:



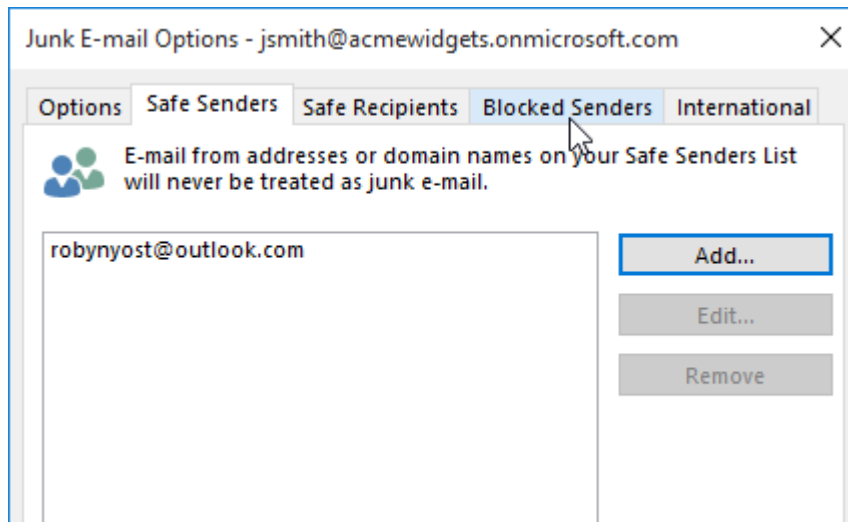
4. Click the Add button:



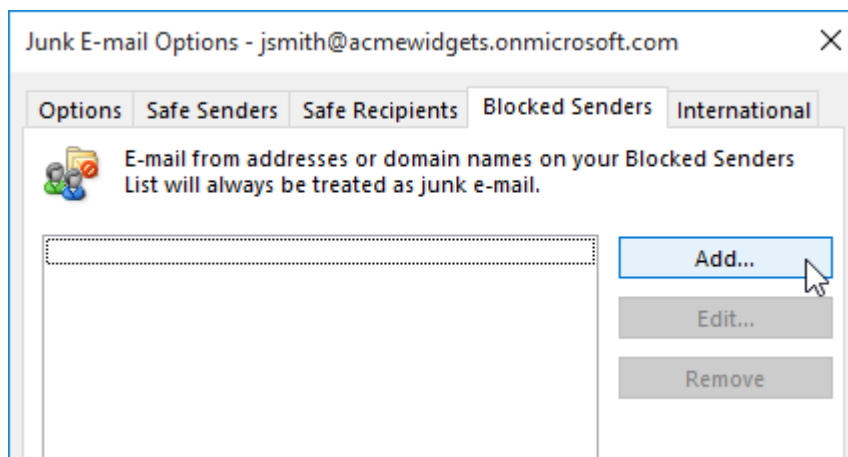
5. The "Add address or domain" dialog box will now be displayed. Type "robynyost@outlook.com" into the provided text box and click OK:



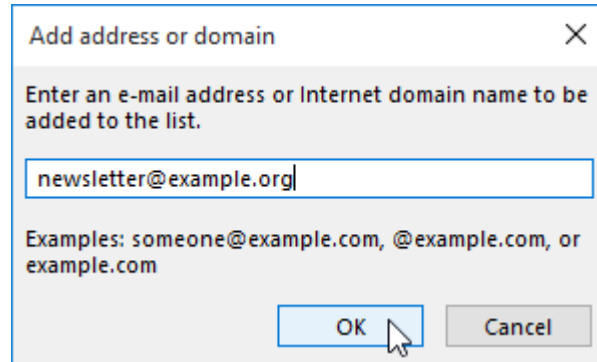
6. Now click the Blocked Senders tab:



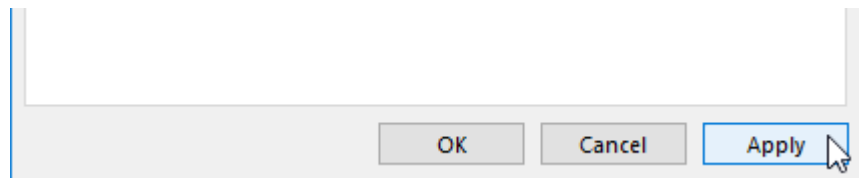
7. You need to add the e-mail address of that newsletter that won't stop e-mailing you to the blocked list. Click the Add button:



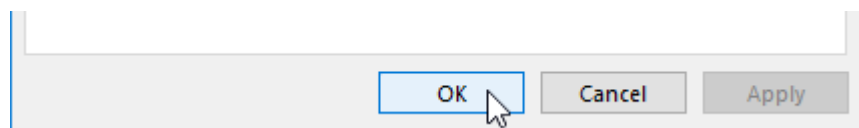
- The “Add address or domain” dialog box will now be displayed. Type “newsletter@example.org” into the provided text box and then click the OK button:



- In the bottom right-hand corner of the Junk E-mail Options dialog box, click the Apply button:



- Click OK to apply the new settings and close the Junk E-mail Options dialog box:



- Close Microsoft Outlook 2016 to complete this exercise.

TOPIC F: Manage Your Mailbox

Another important aspect of managing your e-mail is the ability to manage your mailbox. Specifically, you need to be aware of the size limits of your mailbox to ensure that you don't exceed them. Over the course of this topic, you will learn how to manage the size of your mailbox using a variety of different tools.

Topic Objectives

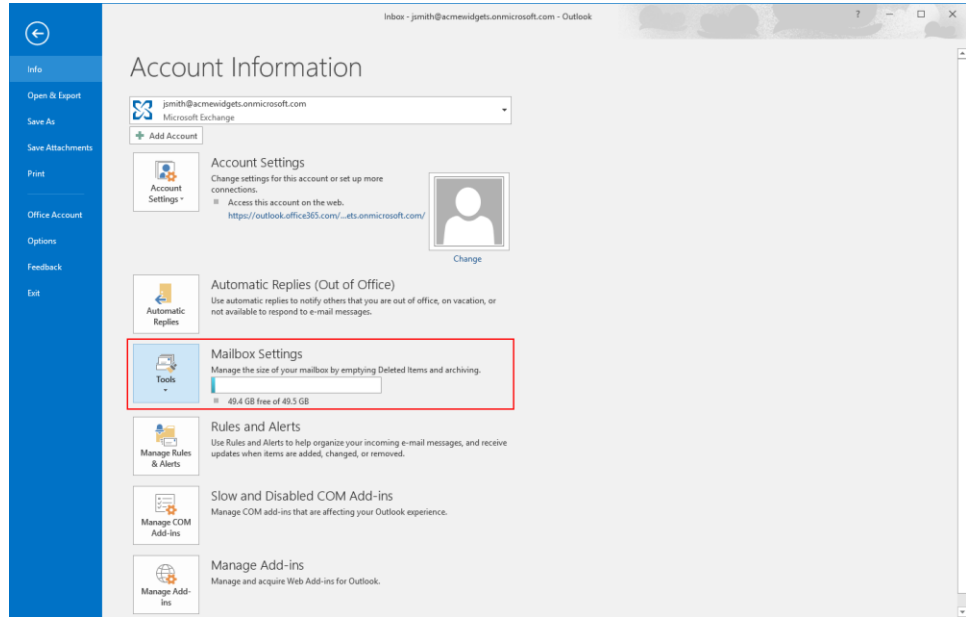
In this topic, you will learn:

- About mailbox sizes
- About alternate message formats
- About archiving (including manual archive and AutoArchive)
- About cleanup tools

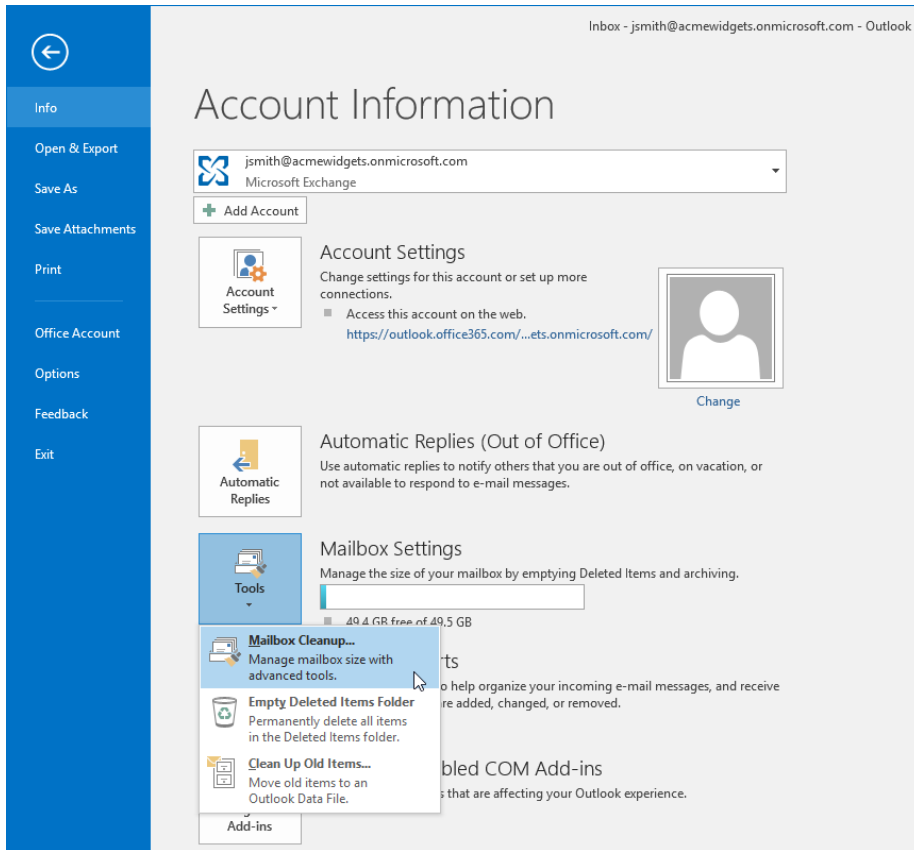
MAILBOX SIZE

Any mailbox that is powered by Microsoft Exchange Server has a limited amount of space allocated to it. The amount of space that is dedicated to each mailbox is decided by the system administrator. If your mailbox exceeds the amount of space allocated to it, you will start losing functionality (such as being prevented from sending new e-mails or even receiving them).

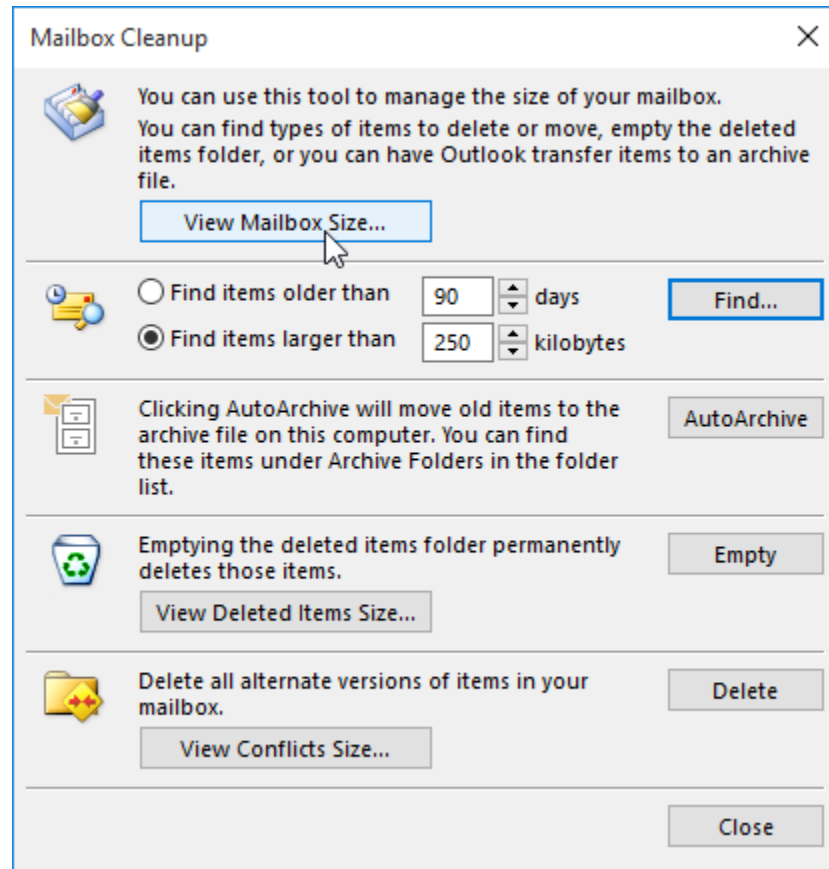
You can view the size of your mailbox by clicking File → Info, and examining the Mailbox Settings section. There you will see a progress bar that shows you the amount of mailbox space available and how much of that space is already taken up:



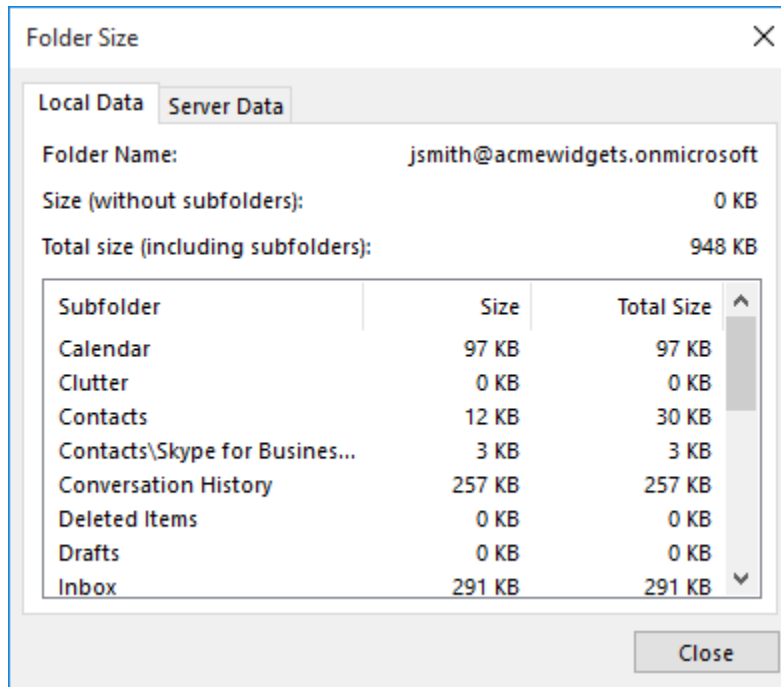
For a more detailed view, click File → Info → Tools → Mailbox Cleanup:



This action will display the Mailbox Cleanup dialog box. At the top of this dialog box, click View Mailbox Size:



The Folder Size dialog box will then be displayed. The sizes for the various components of your mailbox, as well as a total size, will be displayed:



Soft and Hard Mailbox Limits

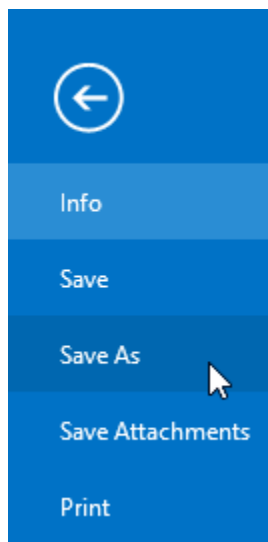
While every mailbox that is hosted on a Microsoft Exchange Server has a size limit, there are actually two different limits to consider: **soft lower** and **hard upper**. If your mailbox is close to the soft lower size limit, you will be notified of this fact through an automated e-mail message. If you continue to exceed this limit, you will still be able to receive new messages but you will be unable to send messages. In order to be able to send new messages, you will need to clean out and reduce the size of your mailbox.

Should your mailbox reach or surpass a hard upper limit, you will be unable to send or receive messages. Again, in order to be able to use your e-mail account you will need to reduce the size of your mailbox. Until then, any messages that you receive may be returned to their original sender as undeliverable.

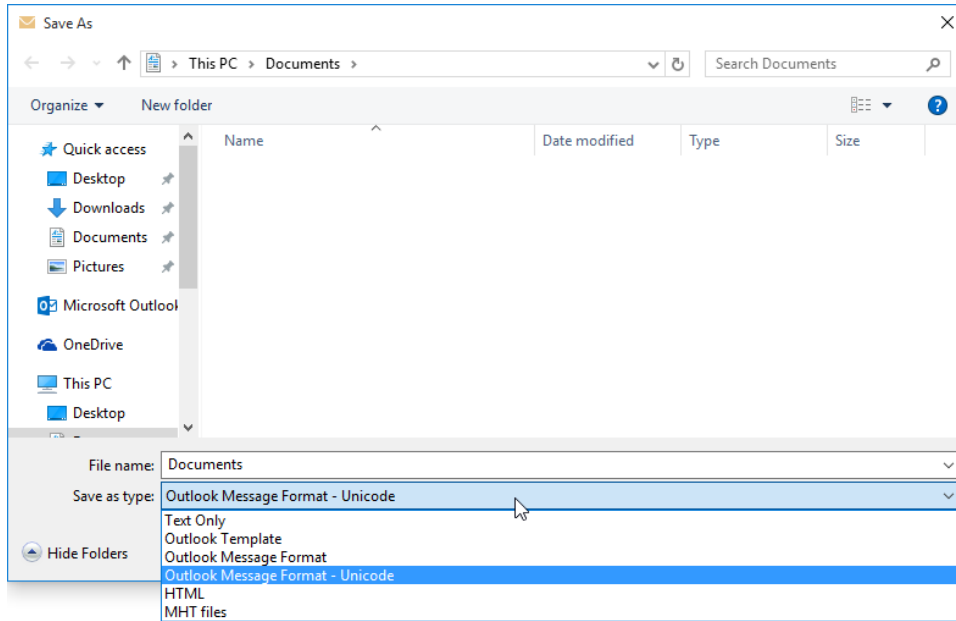
ALTERNATE MESSAGE FORMATS

If you are close to or are exceeding your mailbox's size limits, but have important messages that you cannot delete, you have the option to save them to alternative messages formats. By doing this, you are able to save the message outside of Outlook, but still have access to it. Additionally, you can save messages into formats that can be used with or without Outlook.

To save a message in an alternative message format, first click to select the message in question. Next, click File → Save As:



This action will display the Save As dialog box. Using the controls in this dialog box, you are able to choose where you want your message to be saved. To provide the message that you are saving with a unique file name, type a name inside the “File name” text box. Finally, clicking the “Save as type” drop-down menu allows you to choose the format that you would like to use to save your message:



The various alternative message formats available to you all have different uses, as well as pros and cons:

- **Text Only:** Using this message format will save the current message as a simple text file. This means that any formatting from the original message will be lost, but the basic content will remain. You do not require Outlook to open these types of files.
- **Outlook Template:** By saving a message in this format, you can reuse its basic structure to create a new message.
- **Outlook Message Format:** Choosing this format will save a message as an Outlook message file that can only be opened using Outlook.
- **Outlook Message Format - Unicode:** This will also save the message as an Outlook message file; however, this format is also compatible with other language formats. You would typically use this option if you were going to open this message with an installation of Outlook that uses a different language.
- **HTML:** This option will save your message as a web page that can be opened in any web browser.
- **MHT files:** This message format will save the message as a web-archive file that will include any external resources from the message in the saved file. You would generally use this format if your message contains embedded content, like images.

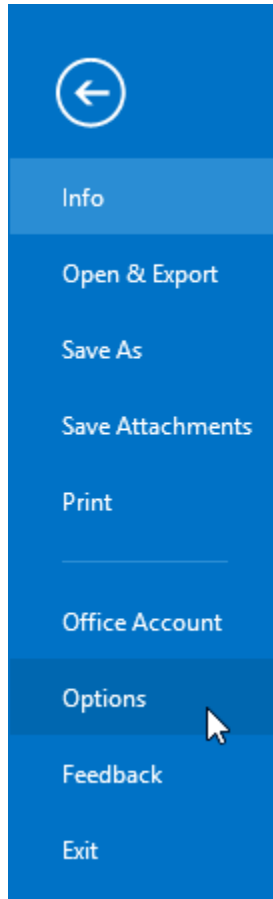
ABOUT ARCHIVING

The archiving process in Outlook moves items from your mailbox and typically stores them locally on your own computer. This process exists to help you clean out older Outlook items from your mailbox and reduce the amount of space your mailbox takes up.

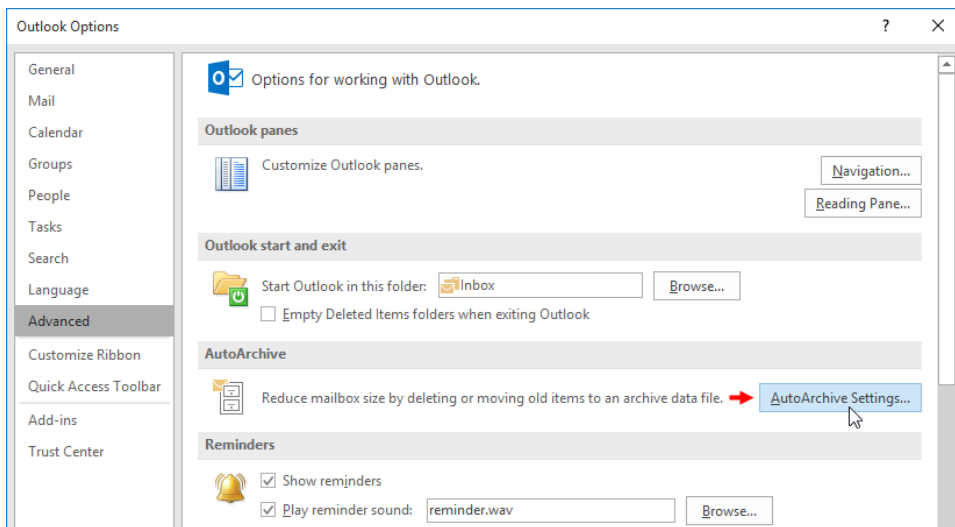
AUTOARCHIVE

The archiving process can be automated by using the AutoArchive feature. This will automatically archive (or delete) any Outlook items that have existed in your mailbox for a set period of time.

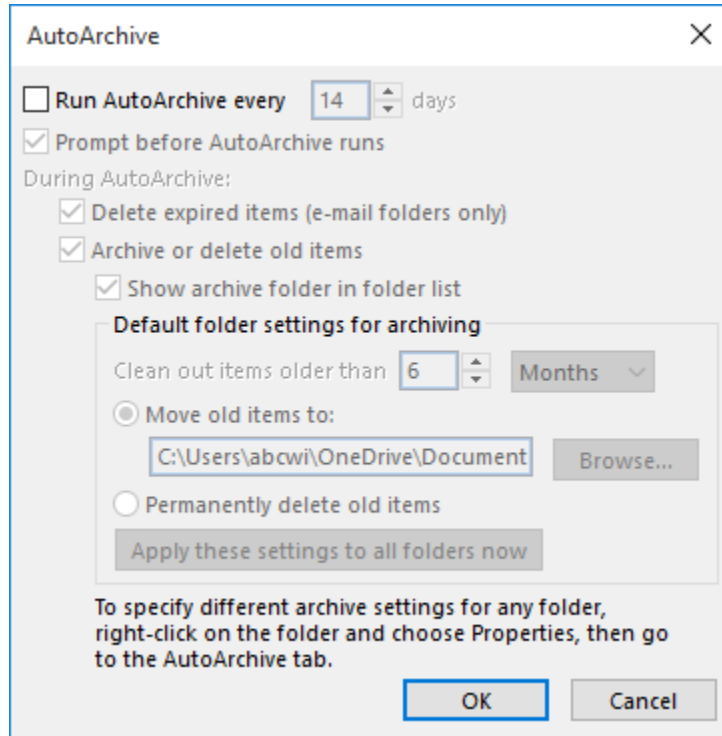
To configure the AutoArchive feature, first open the Outlook Options dialog box by clicking File → Options:



With the Outlook Options dialog box open, click the Advanced category and then click the AutoArchive Settings button:



This action will display the AutoArchive dialog box:

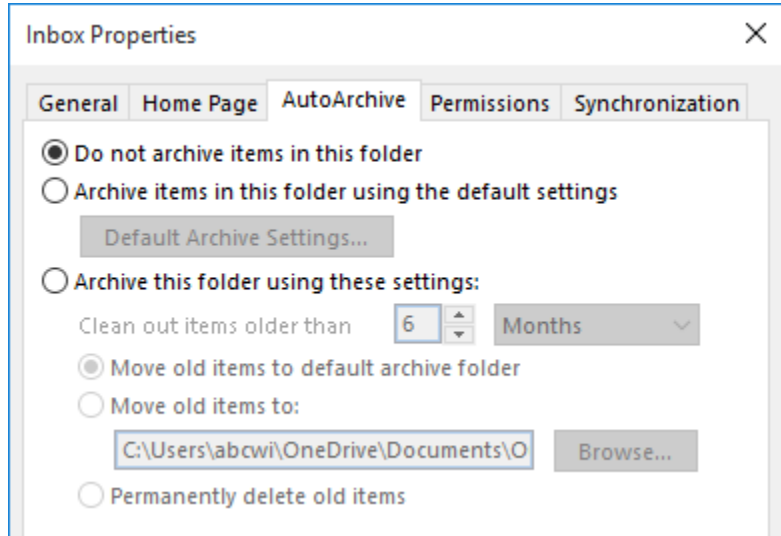


Let's examine all of the options that this dialog box has to offer:

<p>Run AutoArchive every [X] days</p>	<p>If you want AutoArchive to run automatically, check this box. Then, enter how often in days you want it to run.</p>
<p>Prompt before AutoArchive runs</p>	<p>If this box is checked, Outlook will let you know when it's about to archive your data. If it's unchecked, the archiving process will happen in the background.</p>
<p>Delete expired items</p>	<p>If e-mail has been sent to you with an expiry date, this option will delete messages whose expiration date has passed. (This does not apply to other items, like calendar appointments or tasks, which may have occurred in the past.)</p>

<p>Archive or delete old items</p>	<p>Check this box to confirm that you want to archive or delete old items. If this is not checked, the options below it will be grayed out.</p>
<p>Show archive folder in folder list</p>	<p>This will display your archive folder in the list with your other personal folder files, giving you easy access to your old data. (The folder will not appear until Outlook performs an archive.)</p>
<p>Clean out items older than [X] months</p>	<p>You can choose how old items must be to be archived using this option. Pick a number between 1 and 99, and then choose days, weeks, or months from the drop-down menu. (For example, if you have 6 months selected and AutoArchive runs on June 1, it will archive all items time-stamped before January 1 of that year.)</p>
<p>Move old items to</p>	<p>Choose the location of the archive folder. (By default, the file will be named archive.pst and it will be placed in the default Outlook location.)</p>
<p>Permanently delete old items</p>	<p>Instead of moving old items to a folder, you can tell Outlook to permanently delete them. Be careful; if you choose this option there will be no way to recover what Outlook deletes.</p>
<p>Apply these settings to all folders now</p>	<p>Make sure you click this button to apply these archive settings to all folders.</p>

Note that you can also set AutoArchive options for each individual folder by right-clicking that folder, clicking Properties, and clicking the AutoArchive tab. Here are the options that you will see:

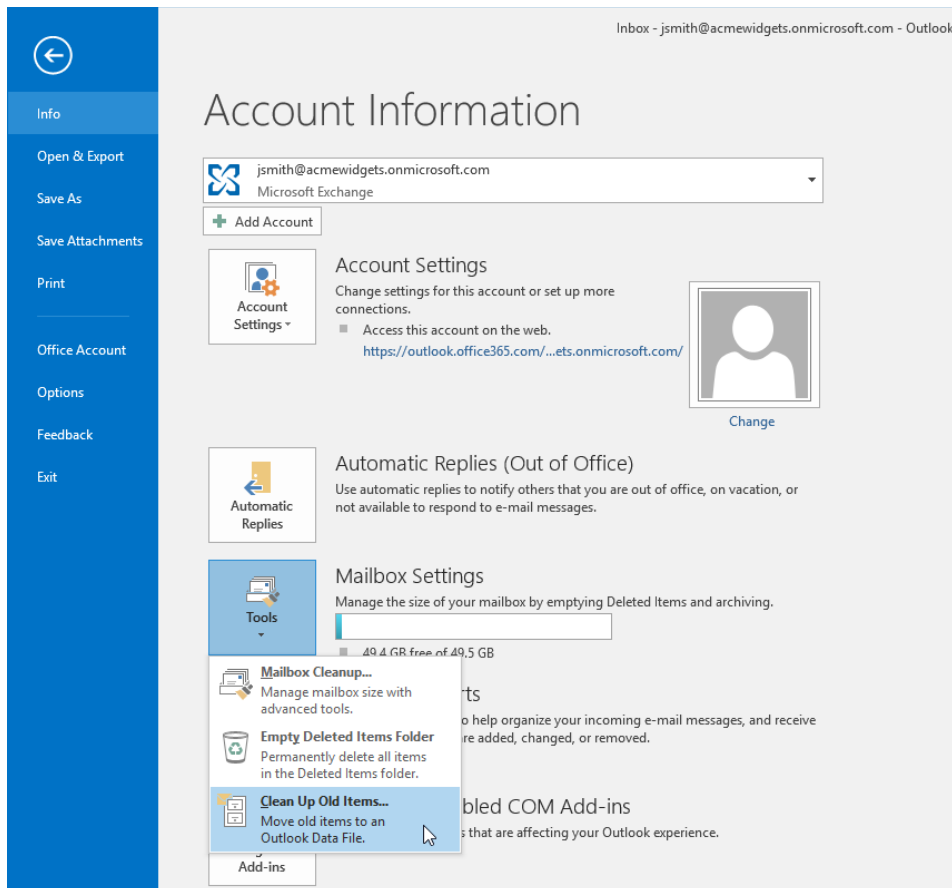


While similar to the AutoArchive dialog box, this tab contains some unique controls:

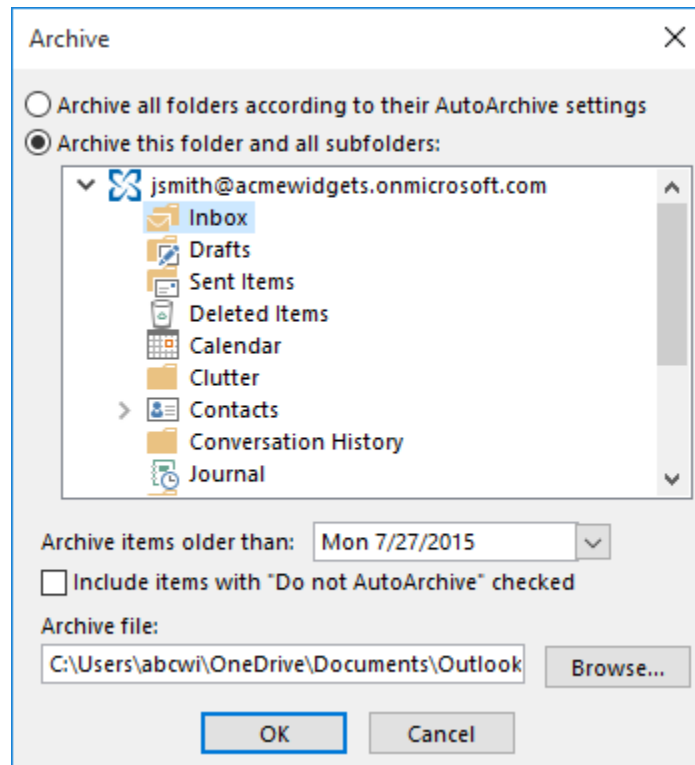
Do not archive items in this folder	Excludes this folder from any archiving options that are set.
Archive items in this folder using the default settings	Tells Outlook to use the default archiving options for this folder. (You can click Default Archive Settings to go back to the main AutoArchive window that we just looked at.)
Archive this folder using these settings	Set different AutoArchive options for this folder only.

MANUALLY ARCHIVING

If you would like to have more control over when Outlook archives, or if you need to archive earlier than AutoArchive calls for, you have the option to archive manually. To start the process, click the folder you want to archive. (If you want to archive all your folders, click your top-level mailbox folder.) Then, click File → Info → Tools → Clean Up Old Items:



This action will display the Archive dialog box:



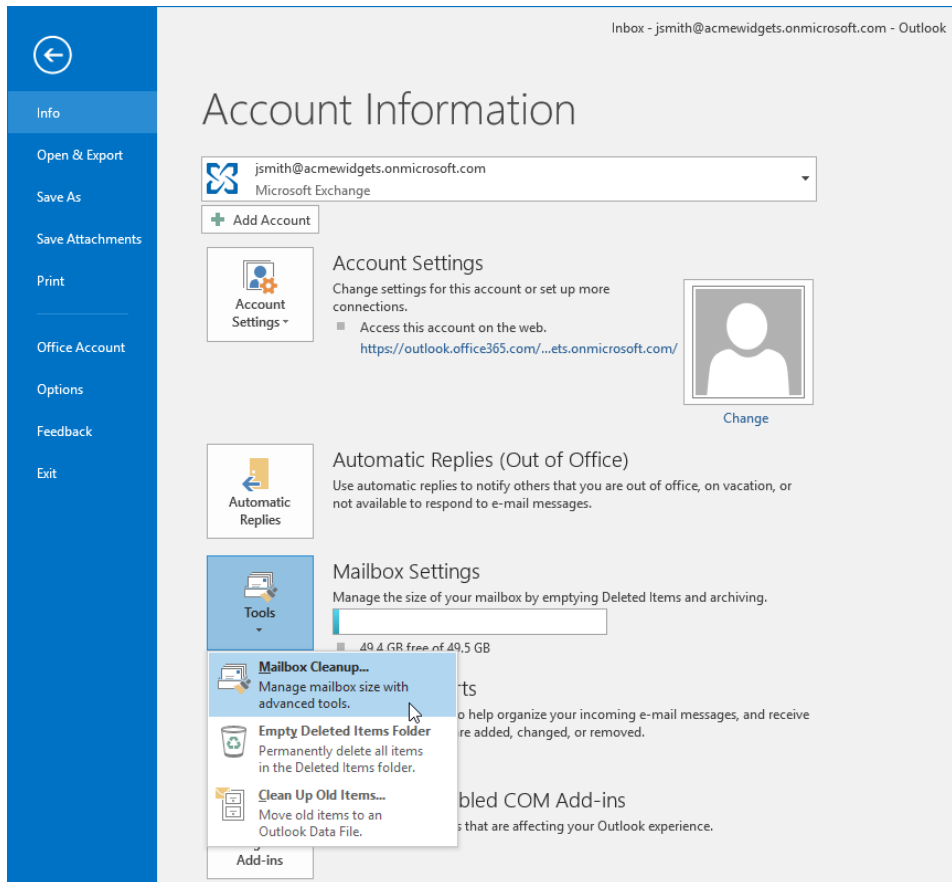
By default the “Archive this folder and all subfolders” radio button will be selected. This means that any folder that is selected in the list box (and any subfolders contained within it) will be archived. If you select the “Archive all folders according to their AutoArchive settings” radio button, you will perform a complete archive using the settings outlined by the AutoArchive feature.

At the bottom of this window you can specify the date; everything before this date will be archived. (If you click the drop-down arrow next to the date, Outlook will give you a calendar to choose from.)

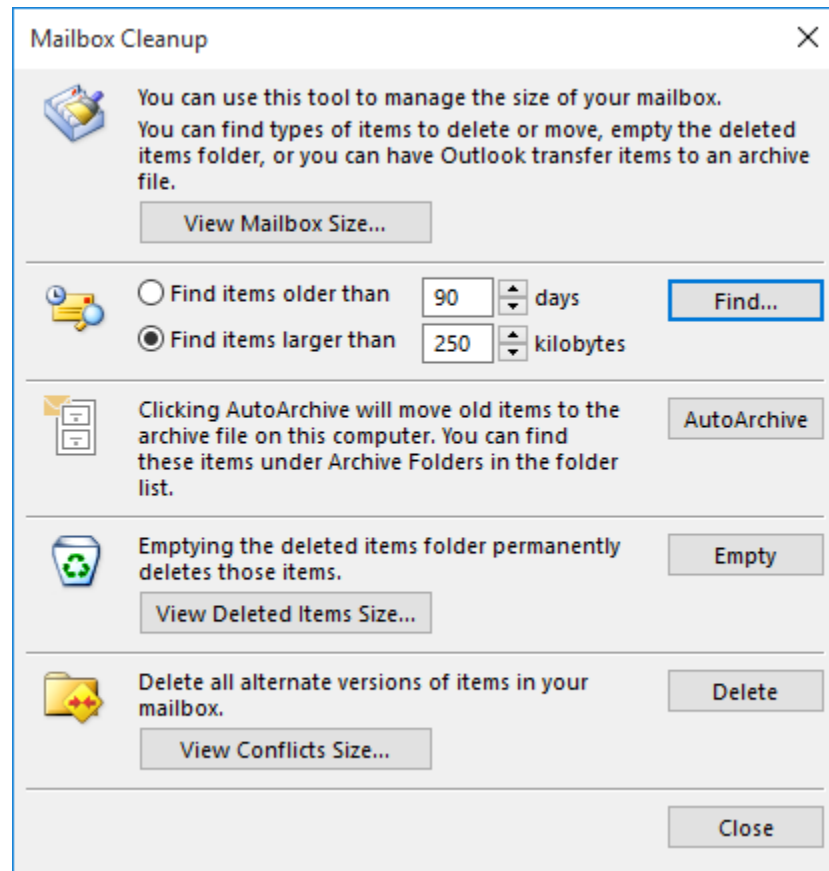
You can also tell Outlook to ignore any exceptions that were made earlier by checking the “Include items with ‘Do not AutoArchive’ checked” option. Last but not least, you can specify a file to save to. When you are ready, click OK to run the archive feature.

CLEANUP TOOLS

Aside from the archive features, you also have access to other methods to help clean up your mailbox. To view these options, click File → Info → Tools → Mailbox Cleanup:



This action will display the Mailbox Cleanup dialog box:



There are several options in this dialog box that you can use to help reduce the size of your mailbox:

View Mailbox Size	Gives you the overall size of your mailbox if you're using Microsoft Exchange Server. All users will see the size of each folder in the mailbox, as well as its total size.
Find	Do a search based on the date or size of items. This can help you organize or delete old or large messages. (When you click Find, an Advanced Find window will appear with your results.)
AutoArchive	Archives your data based on AutoArchive settings. (Default settings will be used if you haven't specified any yet.)
Deleted Items Folder	Check the size of your Deleted Items folder, or empty it.
View Conflicts Size	If you're on a network like Microsoft Exchange Server, you can view different versions of items in your mailbox and delete the ones you don't need. (If you're not on a network, this option is not available.)

Once you're done using the tools in this window, just click Close to go back to the File menu.

ACTIVITY 2-6

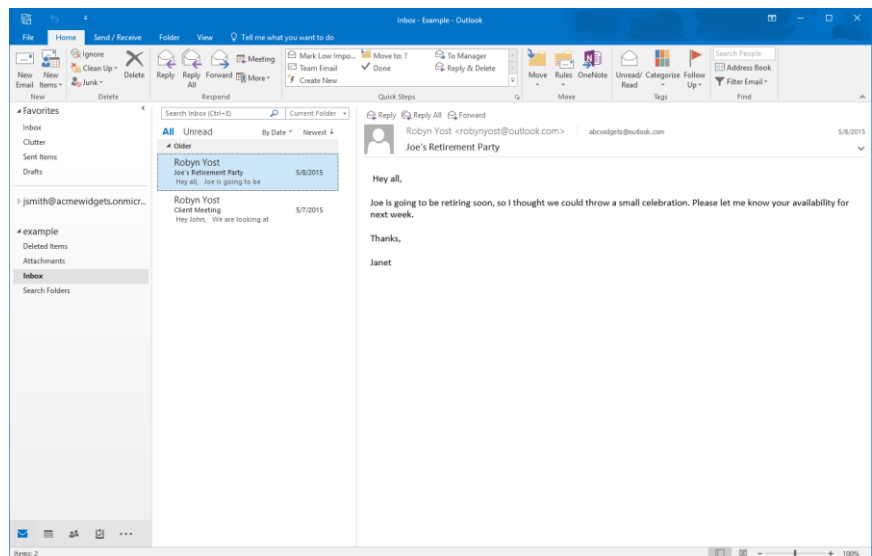
Managing Your Mailbox

The mailbox that you are using is getting close to the soft lower mailbox limit. To help reduce the size of your mailbox, you need to archive the messages in the Attachments folder. First, you need to find out exactly how much space your mailbox is currently taking up.

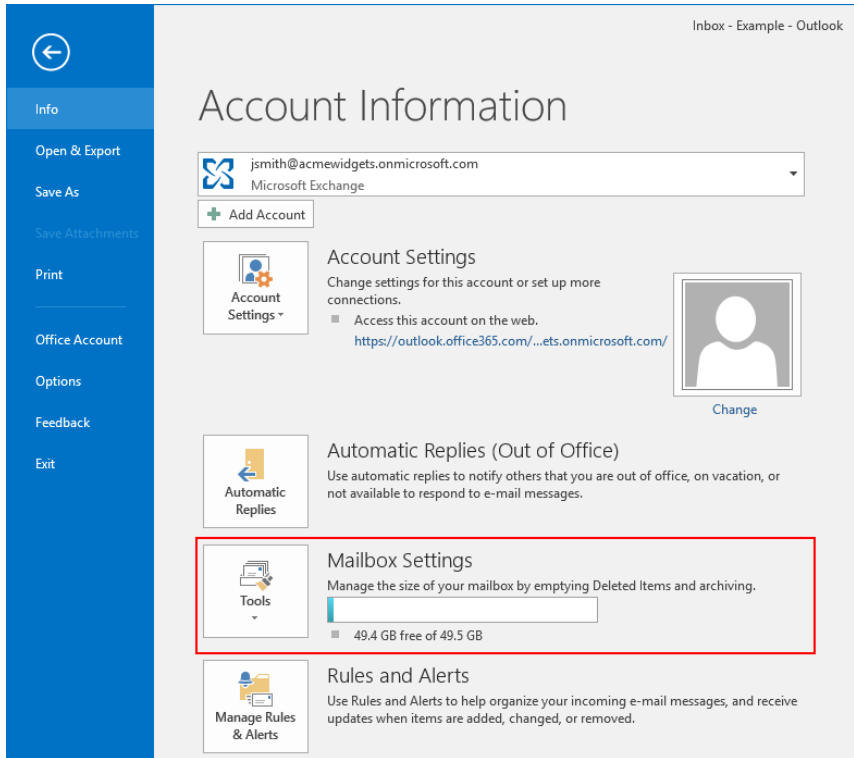
Before students begin, please have them follow these steps to open the Activity 2-6.pst file in their Exercise Files.

- Click the File menu, click Open & Export, and click Open Outlook Data File.
- Browse to Activity 2-6.pst in the Exercise Files folder. Click Open.

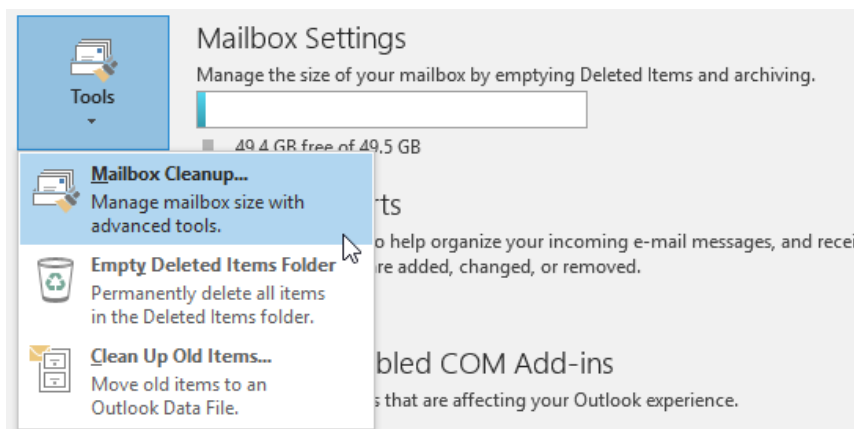
1. To begin, open Outlook 2016. Ensure that the Inbox folder for the “example” Outlook data file is displayed:



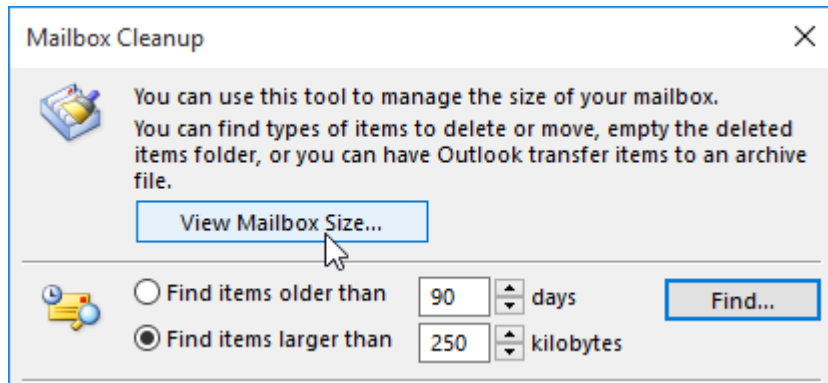
2. First, you need to find out the size of your mailbox. Click File → Info. You will see the current size of your mailbox compared to its maximum possible size:



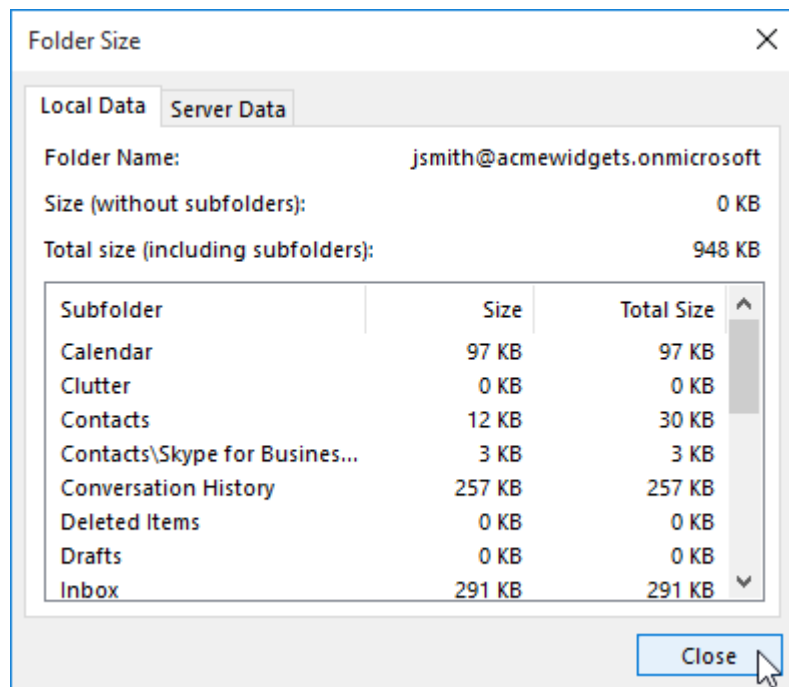
3. For more detailed information, click Tools → Mailbox Cleanup:



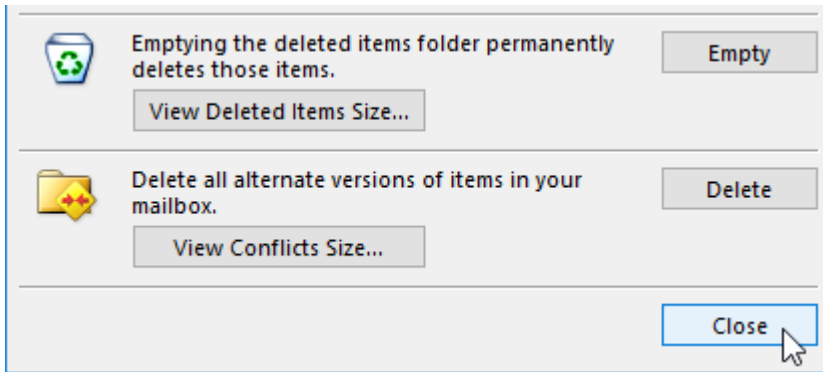
4. The Mailbox Cleanup dialog box will now be displayed. Near the top of this dialog box, click the View Mailbox Size button:



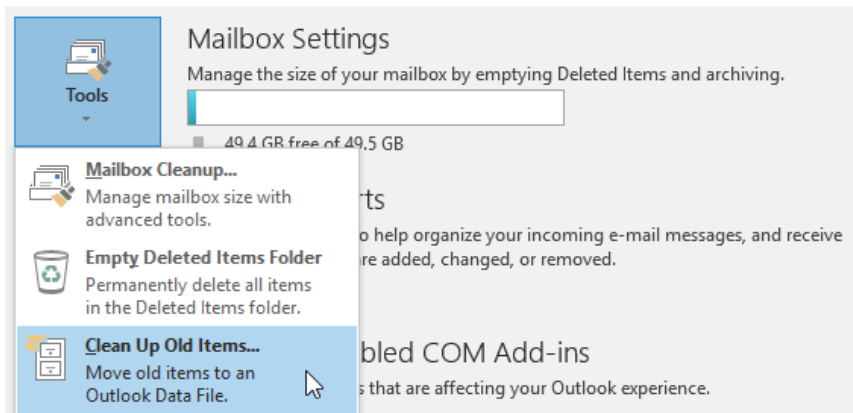
5. The Folder Size dialog box will now be displayed and show you the detailed size of your default mailbox (not the data file). Review this information and then click the Close button:



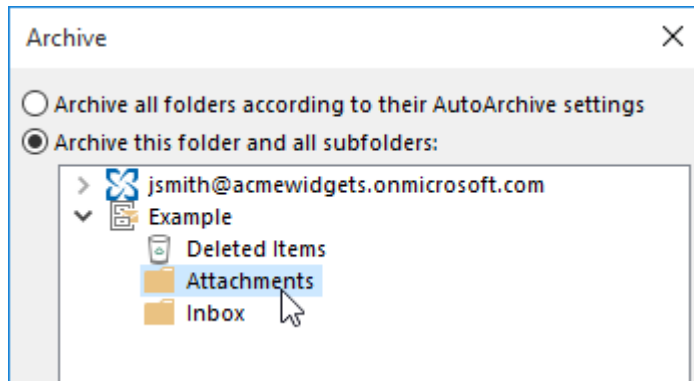
6. Returning to the Mailbox Cleanup dialog box, click the Close button:



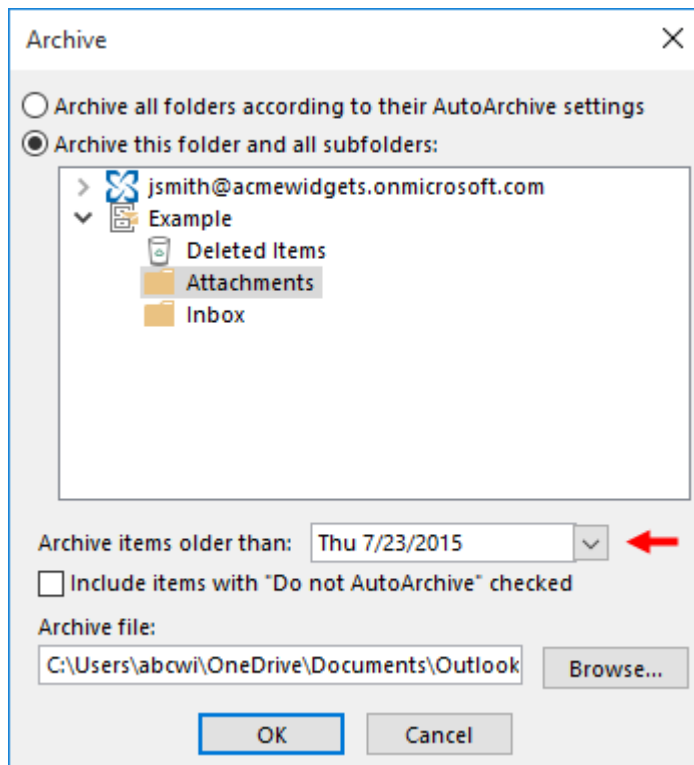
7. With the Info category of the File menu still displayed, click Tools → Clean Up Old Items:



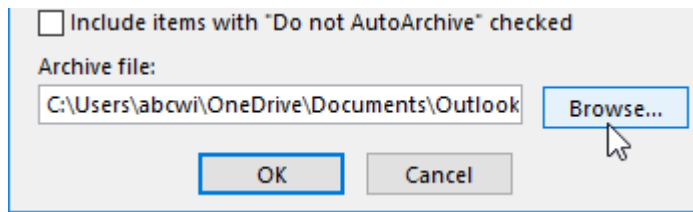
8. The Archive dialog box will now be displayed. Ensure that the “Archive this folder and all subfolders” radio button is selected. Click to select the Attachments folder from under the Example heading:



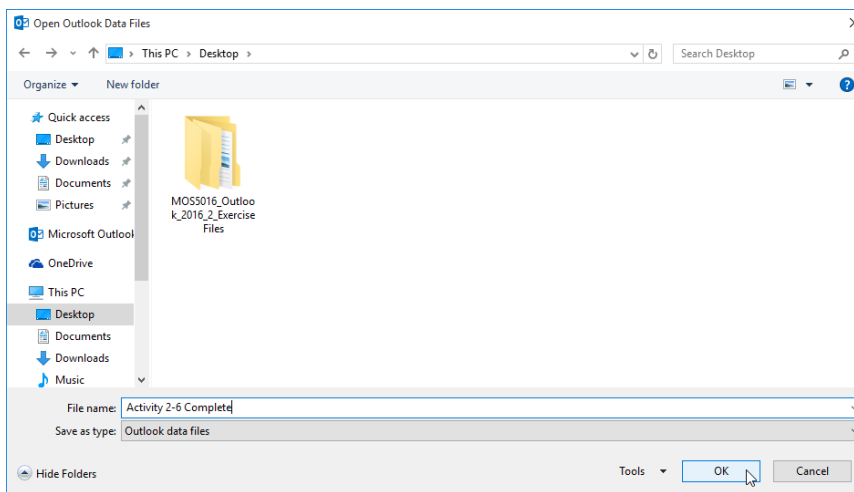
9. Lower in this dialog box, ensure that the current date is displayed in the “Archive items older than” drop-down menu:



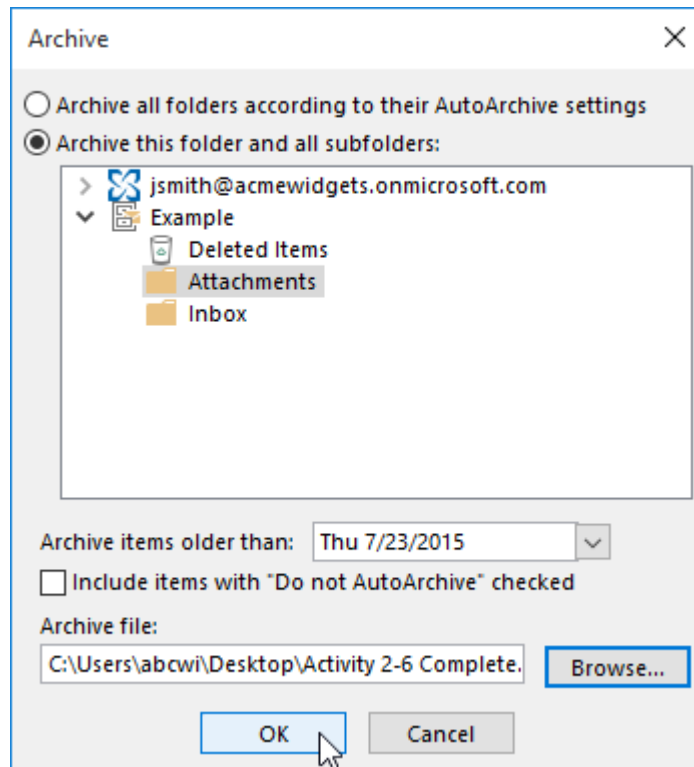
10. Next, you need to choose where you would like to export the resulting archive file. Click the Browse button:



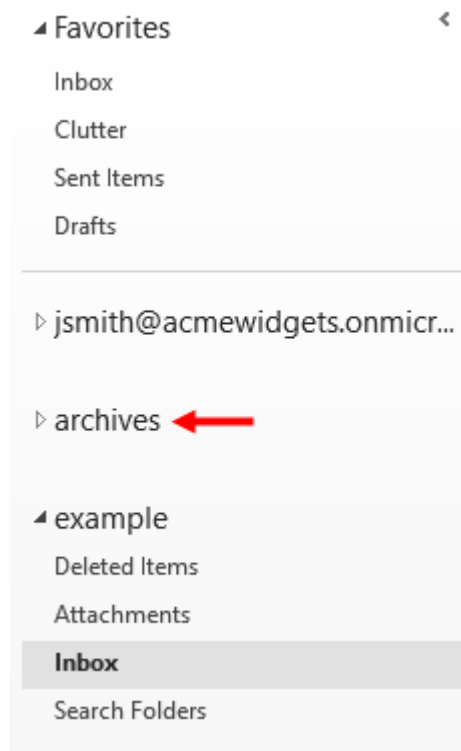
11. The Open Outlook Data Files dialog box will now be displayed. Use the controls in this dialog box to navigate to the desktop. Within the "File name" text box, type "Activity 2-6 Complete." Click OK:



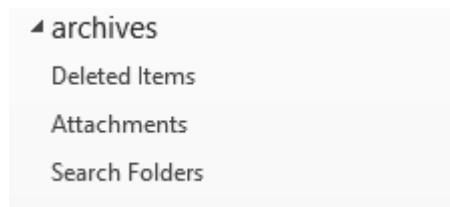
12. Back in the Archive dialog box, click OK to run the archive tool:



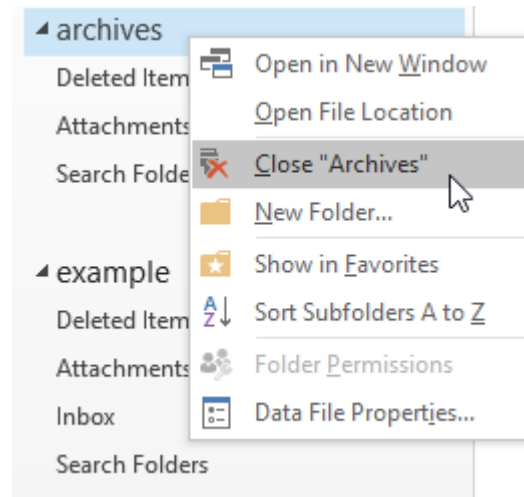
13. Click the Back tab to return to the Mail workspace. In the Navigation pane, you will see that a folder called Archives has been added:



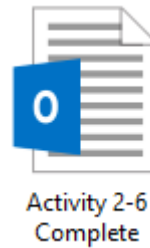
14. Expand this folder. You will see that the Attachments folder appears as one of its subfolders:



15. Close both the Example and Archives folder by right-clicking on each and clicking Close:



16. Close Outlook 2016 to complete this exercise. You will see that the Activity 2-6 data file that you created through the archive tool exists on your desktop:



Summary

Over the course of this topic, you learned about many of the advanced message management tools that are available to you. You should now feel comfortable sorting, filtering, and organizing messages within your mailbox. Additionally, you should now be able to effectively search your mailbox for specific Outlook items. Finally, you should be able to manage junk mail using junk e-mail filters, as well as manage the size of your mailbox.

REVIEW QUESTIONS

1. **What dialog box do you first need to open in order to display either the Sort dialog box or the Filter dialog box?**
2. **What does conditional formatting do?**
3. **Where can you find the options that configure how search works in Outlook 2016?**
4. **What is the default junk e-mail filter level?**
5. **What is the easiest way to view the size of your mailbox?**

LESSON 3: ADVANCED CALENDAR AND TASK MANAGEMENT

Lesson Objectives

In this lesson you will learn how to:

- Manage advanced calendar options
- Manage additional calendars
- Manage meeting responses
- Assign and manage tasks

TOPIC A: Manage Advanced Calendar Options

To configure your calendar to suit your own unique workflow and needs, you have access to many different advanced calendar options. Over the course of this topic, you will learn about these options and how to use them.

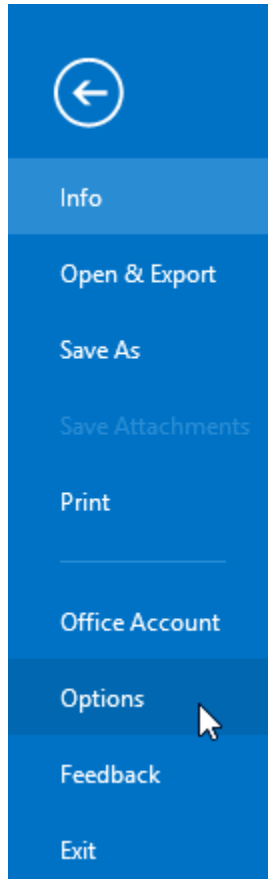
Topic Objectives

In this topic, you will learn:

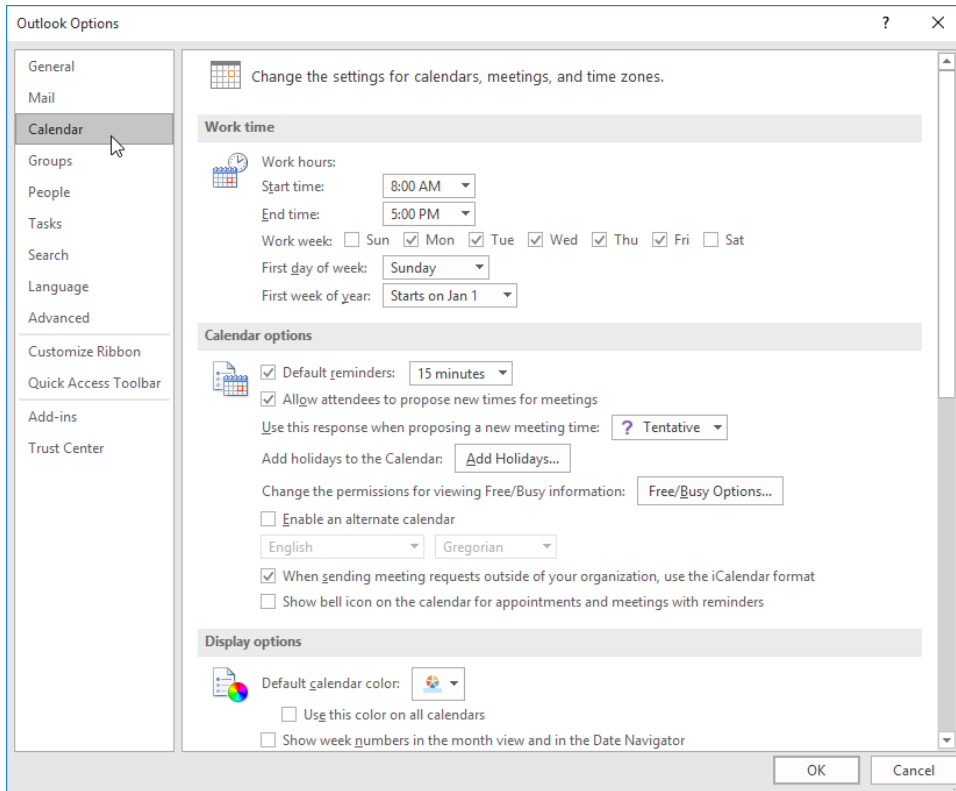
- About calendar settings
- About work time options
- About calendar options
- About display options
- About time zone options
- About other calendar options

ACCESS CALENDAR SETTINGS

To control how your calendar looks and works, first open the Outlook Options dialog box by clicking File → Options:




Then, click the Calendar category:



This category is comprised of several different sections. For the remainder of this topic, we will examine each of these sections.

WORK TIME OPTIONS


Work time


 Work hours:
 Start time: 8:00 AM
 End time: 5:00 PM
 Work week: Sun Mon Tue Wed Thu Fri Sat
 First day of week: Sunday
 First week of year: Starts on Jan 1

Inside the **“Work time”** section, you can find controls that allow you to specify when your typical work day starts and ends. Additionally, you can choose the days of your work week as well as what the first day of the week is and the first week of the year.

CALENDAR OPTIONS

Calendar options




 Default reminders: 15 minutes
 Allow attendees to propose new times for meetings
 Use this response when proposing a new meeting time: ? Tentative
 Add holidays to the Calendar: [Add Holidays...](#)
 Change the permissions for viewing Free/Busy information: [Free/Busy Options...](#)
 Enable an alternate calendar
 English Gregorian
 When sending meeting requests outside of your organization, use the iCalendar format
 Show bell icon on the calendar for appointments and meetings with reminders

The **“Calendar options”** section includes controls to set the following options:

- Default reminders
- Allow attendees to propose new times for meetings
- Choose a default response when a new meeting time is proposed
- Add holidays to your calendar
- Change who can view your free/busy information
- Toggle an alternate calendar
- Use the iCalendar format when sending meeting requests to people outside of your organization
- Toggle a small bell icon on appointments and meetings that have a reminder

DISPLAY OPTIONS

Display options

 Default calendar color: 

Use this color on all calendars

Show week numbers in the month view and in the Date Navigator

When in Schedule View, show free appointments

Automatically switch from vertical layout to schedule view when the number of displayed calendars is greater than or equal to:


Automatically switch from schedule view to vertical layout when the number of displayed calendars is fewer than or equal to:

The “**Display options**” section allows you to choose exactly how your calendar is displayed in Outlook. This includes the following settings:

- Default calendar color
- Toggle week numbers in the month view and in the Date Navigator
- Show or hide free appointments while in the Schedule View
- Toggle week numbers in the Month view as well as the Date Navigator
- Toggle when Schedule View switches to and from the vertical layout, as well as set how many calendars can be displayed before the views are changed

TIME ZONE OPTIONS

Time zones

 Label:

Time zone:

Show a second time zone

Label:

Time zone:

The controls in this section are used to configure the time zone that Outlook will use. Additionally, you will also find the option to show a second time zone. This is useful if you find yourself travelling between two time zones on a frequent basis or if you often work with people who are in other areas.

OTHER CALENDAR SETTINGS

The last three sections in the Calendar category of the Outlook Options dialog box are “Scheduling assistant,” “Resource scheduling,” and “Weather:”

The screenshot shows the Outlook Options dialog box with the Calendar category selected. It is divided into three sections:

- Scheduling assistant:** Contains two checked checkboxes: "Show calendar details in ScreenTip" and "Show calendar details in the scheduling grid".
- Automatic accept or decline:** Contains a checkbox for "Automatically accept or decline meeting requests." which is checked. To the right is a button labeled "Auto Accept/Decline...".
- Weather:** Contains a checked checkbox for "Show weather on the calendar". Below it is the text "Show temperature in:" followed by two radio buttons: "Celsius" (unchecked) and "Fahrenheit" (checked).

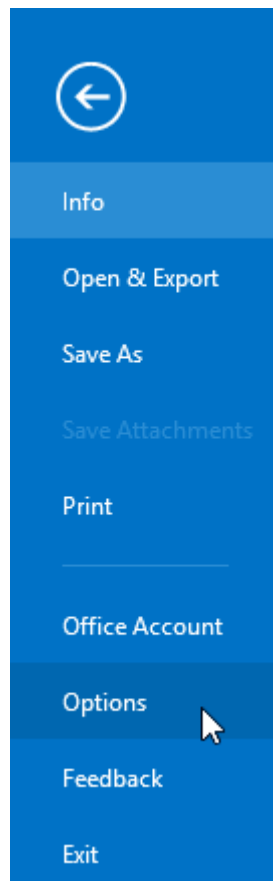
In the “**Scheduling assistant**” section, you are able to choose when calendar details are shown. The “**Resource scheduling**” section is used to manage any resources that are available to you via a Microsoft Exchange Server. The “**Weather**” section allows you to toggle the weather on the calendar, as well as choose between the Celsius and Fahrenheit units.

ACTIVITY 3-1

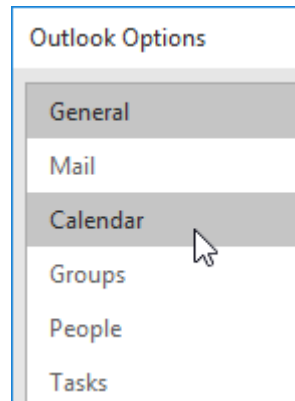
Managing Advanced Calendar Display Options

Currently you work 8:00 AM to 6:00 PM, Monday to Thursday. You need to update your calendar in Outlook to reflect this schedule. Additionally, as you frequently conduct business in Japan, you would like to add Japanese holidays to your calendar and add Tokyo time as a second time zone.

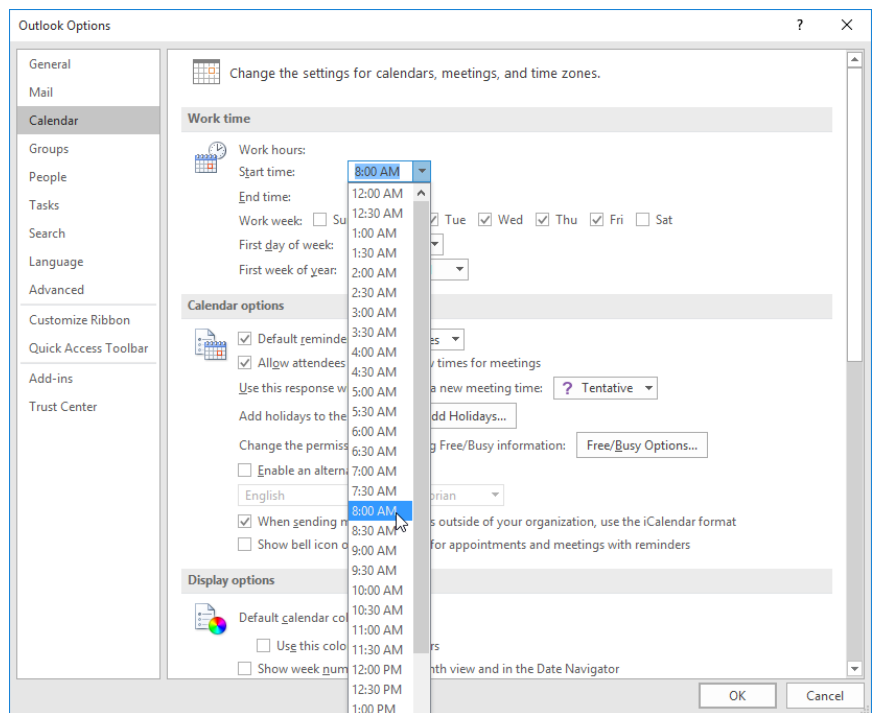
1. To begin, open Outlook 2016.
2. Open the Outlook Options dialog box by clicking File → Options:



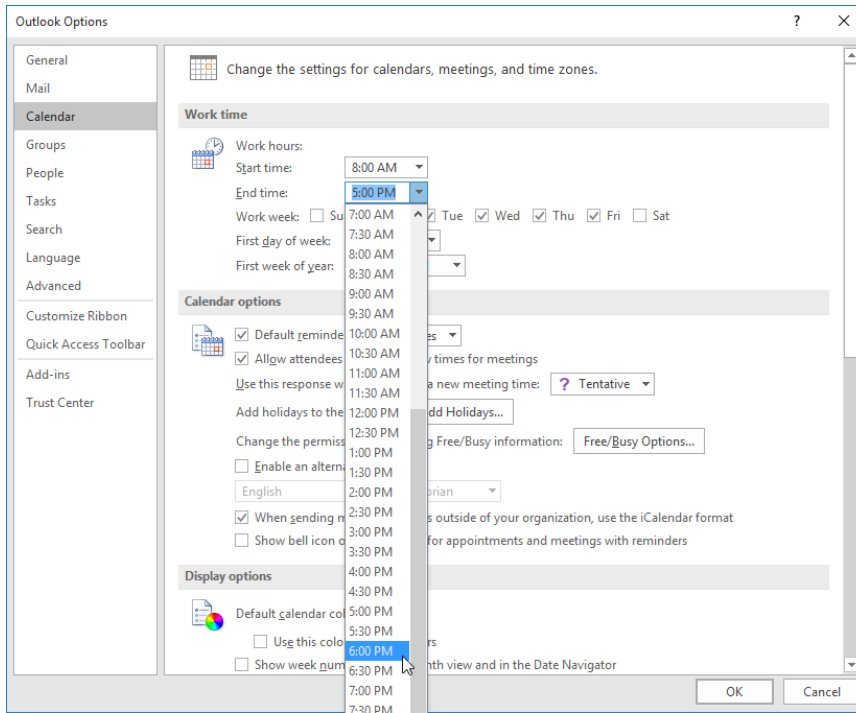
3. With the Outlook Options dialog box open, click the Calendar category:



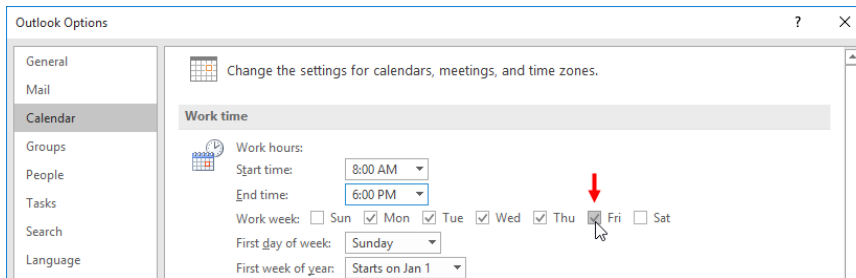
4. First you need to modify how your work week is shown in the calendar. Inside the “Work time” section, click the “Start time” drop-down menu and choose 8:00 AM:



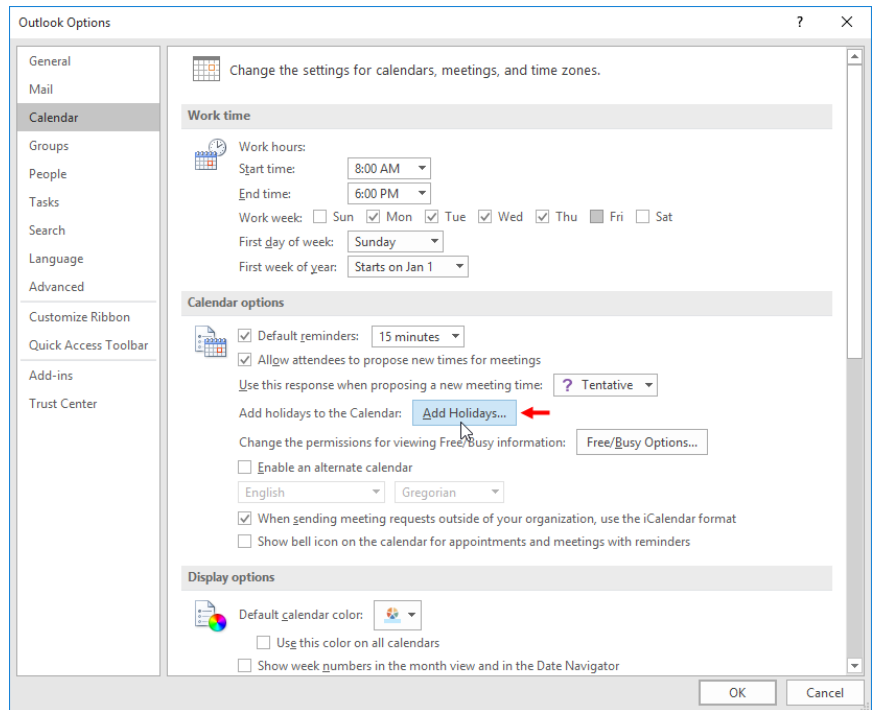
5. Next, click the “End time” drop-down menu and choose 6:00 PM:



6. Deselect the “Fri” checkbox:



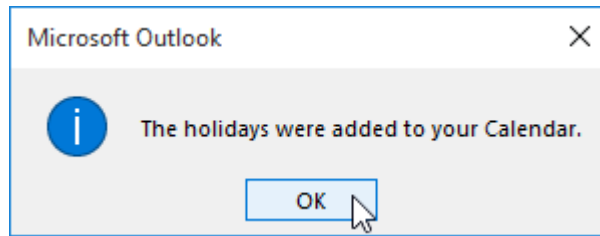
- Now you need to add Japanese holidays to your calendar. Inside the “Calendar options” section, click the Add Holidays button:



- The Add Holidays to Calendar dialog box will now be displayed. Find the Japan check box and check it while leaving your current country's check box still selected. Click OK:

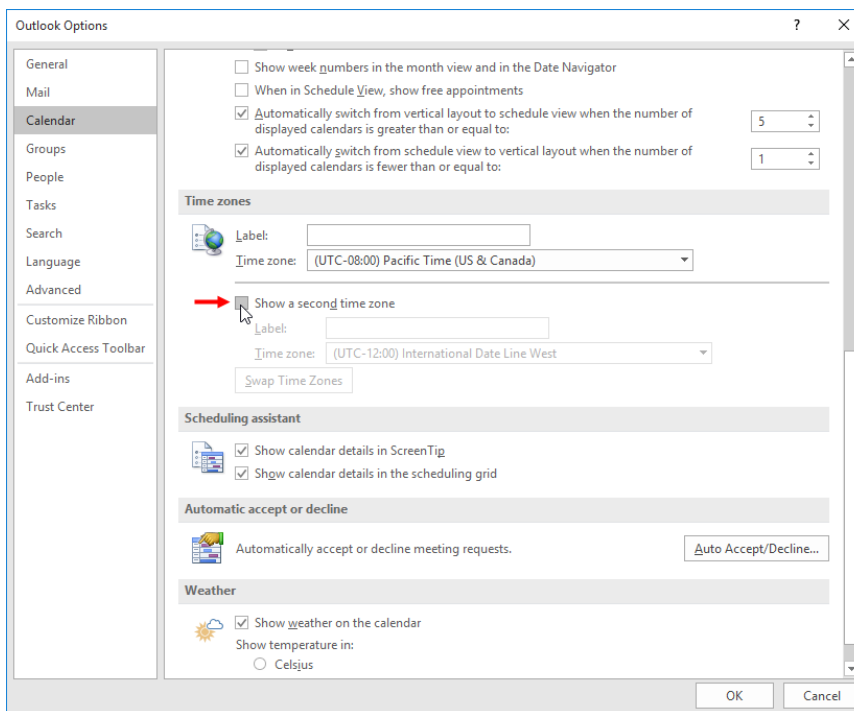


9. After a few moments Outlook will import the holidays to your calendar. In the subsequent dialog box, click OK:

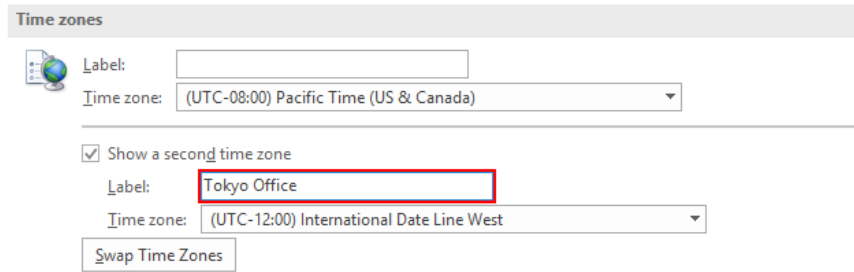


(If you see a prompt about duplicate holidays, click No to skip importing them.)

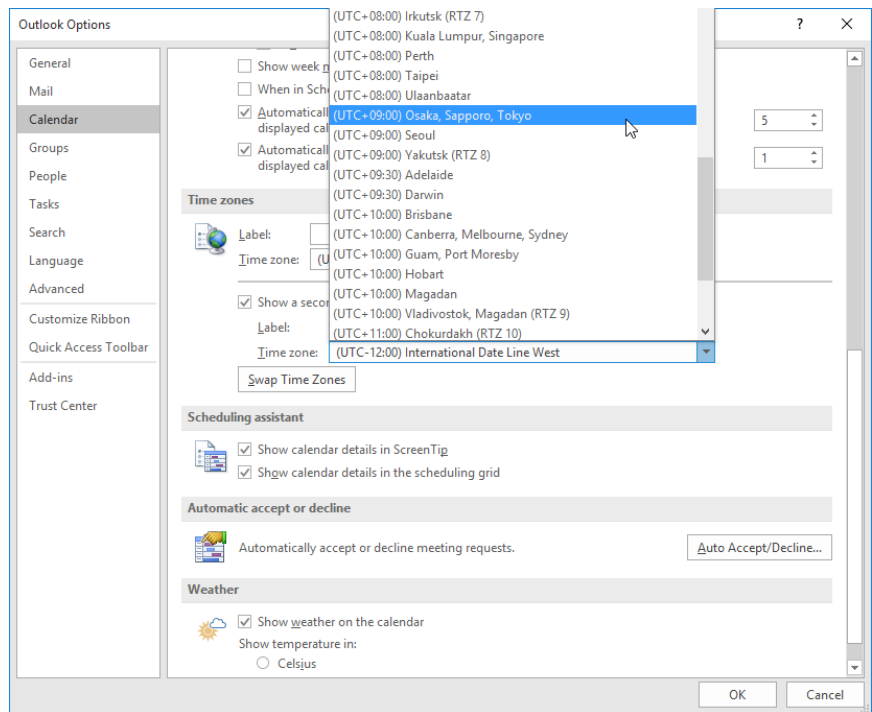
10. Now all you need to do is add the time zone for Tokyo. If the Outlook Options dialog box has closed, re-open it to the Calendar category. Next, inside the "Time zones" section, check the "Show a second time zone" checkbox:



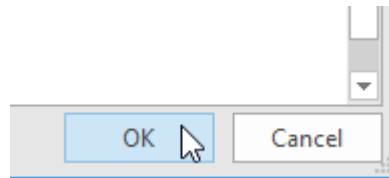
11. In the Label text box, type “Tokyo Office:”



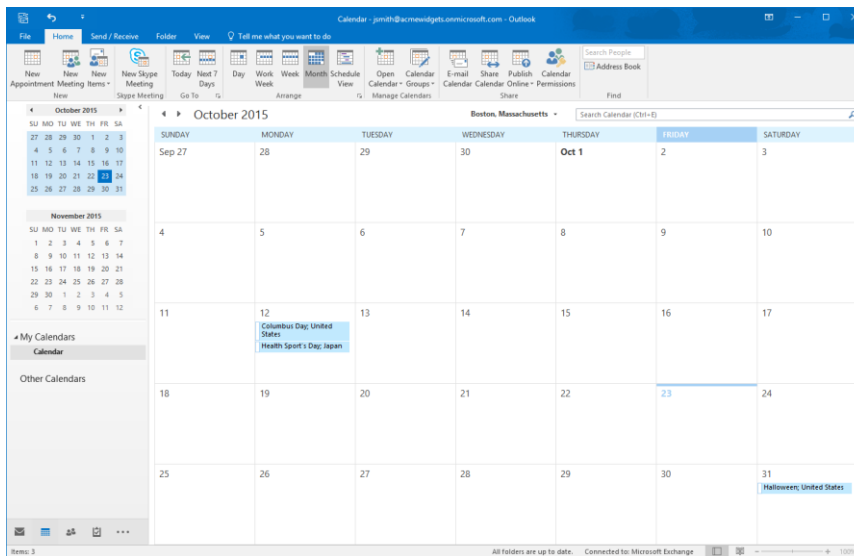
12. Using the “Time zone” drop-down menu, select “(UTC +09:00) Osaka, Sapporo, Tokyo:”



13. Apply all of these new settings by clicking the OK button in the lower right-hand corner of the Outlook Options dialog box:



14. View your calendar using the Month arrangement. You will see that the new holidays have been added:



(If you wish, switch to the Work Week arrangement to view how your work week is now displayed.)

15. Close Microsoft Outlook 2016 to complete this exercise.

TOPIC B: Manage Additional Calendars

The ability to manage additional calendars is an important one. You can use this feature to separate your personal appointments and your professional ones by placing them on separate calendars. Additionally, you are able to add the calendars of other people so that you can have a better understanding of their schedule and use it to better be able to schedule appointments. Over the course of this topic you will learn all about how to manage additional calendars in Microsoft Outlook 2016.

Topic Objectives

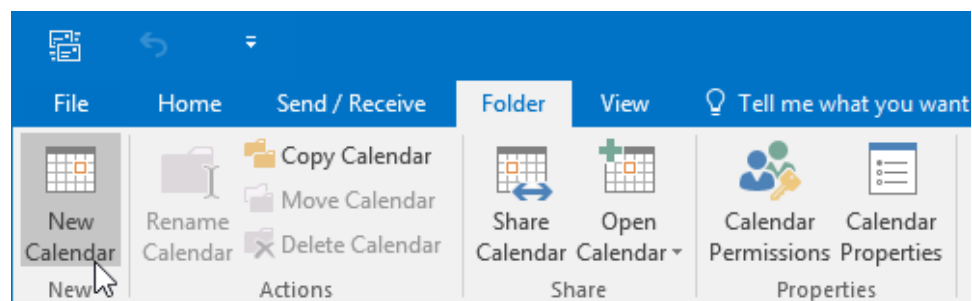
In this topic, you will learn:

- About adding additional calendars
- About overlay calendars
- About calendar groups
- How to create calendar groups

ADDITIONAL CALENDARS

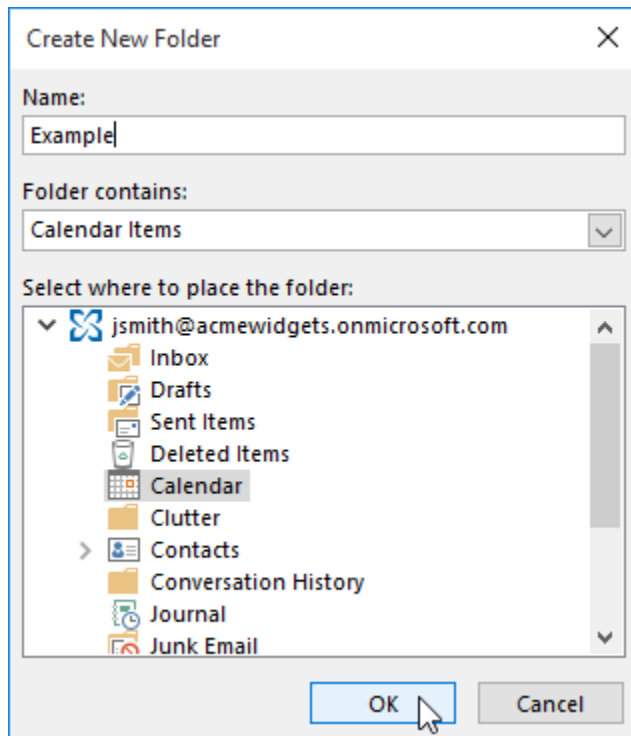
There are lots of different reasons that you may want to add additional calendars to the Calendar workspace in Outlook. For example, if you find yourself scheduling personal appointments on the same calendar that you use for work, you can add another calendar to keep them separate. You could also add an additional calendar that is dedicated to keeping track of an important project. However, no matter the reason that you are adding an additional calendar, the process is the same.

To create an additional calendar from scratch, open the Calendar workspace and click Folder → New Calendar:

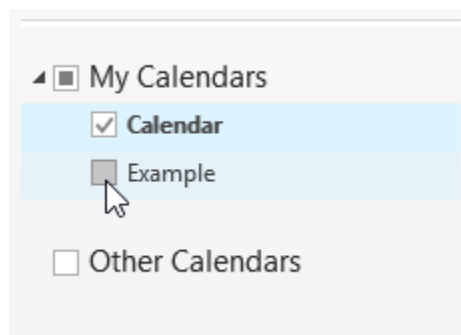


(Alternatively, you could click Folder → Open Calendar → Create New Blank Calendar.)

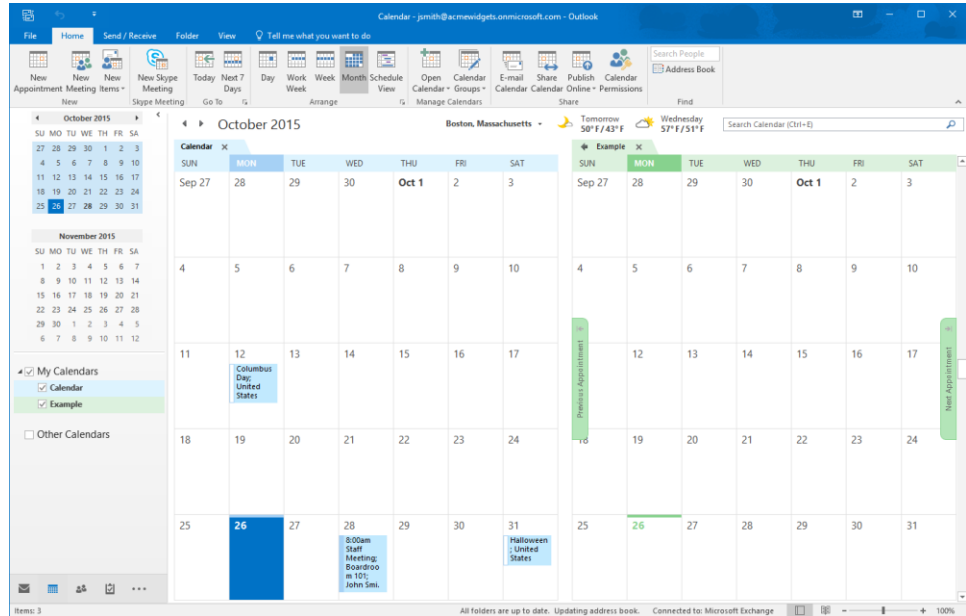
This action will display the Create New Folder dialog box. Type the name for your new calendar into the Name text box. Next, in the “Select where to place the folder” list, ensure that the Calendar item is selected and then click OK:



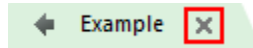
The new calendar will be created and listed in the Navigation pane under the My Calendars section. Click its associated check box to display it alongside the currently shown calendar:



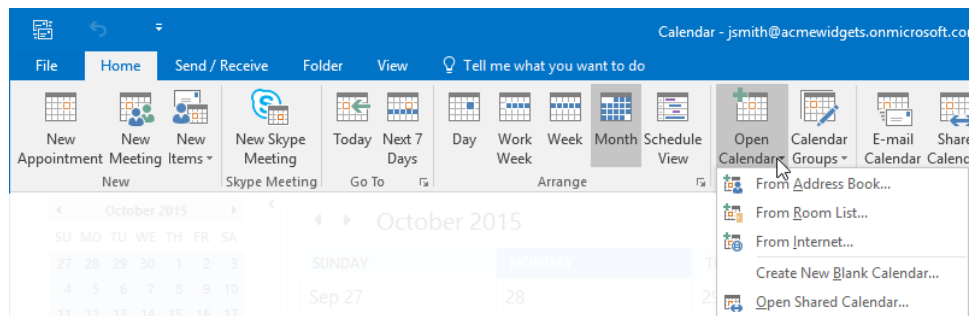
In this case you can see that the default calendar and the Example calendar are displayed next to each other. Note that color coding has been applied to help separate these calendars from one another:



You can hide any displayed calendars by deselecting their associated check boxes in the Navigation pane, or by clicking the small X that appears in the right side of their tab:

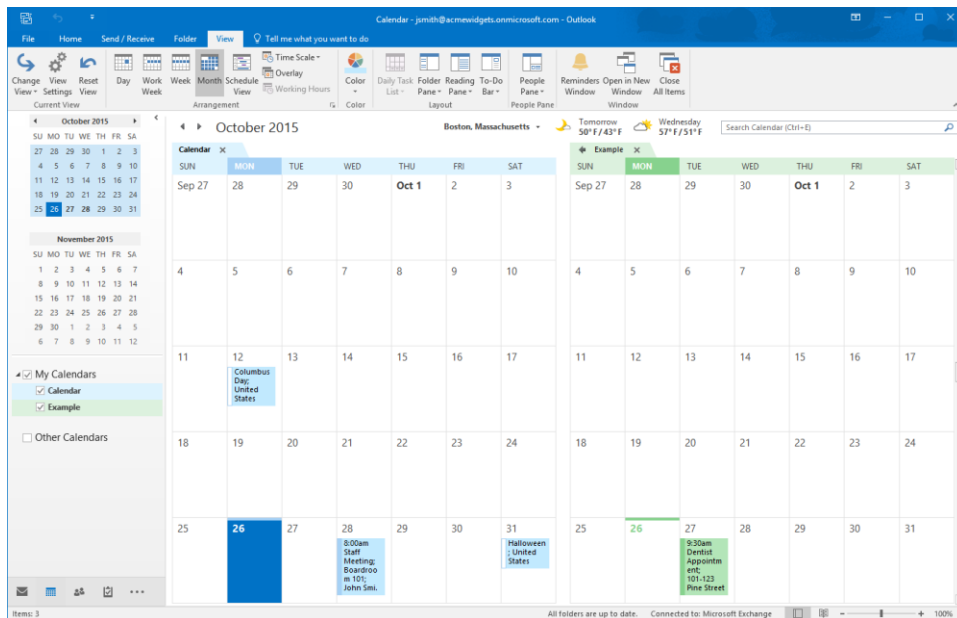


Rather than adding a new blank calendar to the Calendar workspace, you do have the option to add existing calendars from those who are in your Address Book, the scheduling calendar for any room that your organization uses (and have added to Exchange), calendars available on the Internet, and any shared calendars that you have been given access to. You can find all of these options in the Calendar workspace by clicking Home → Open Calendar:

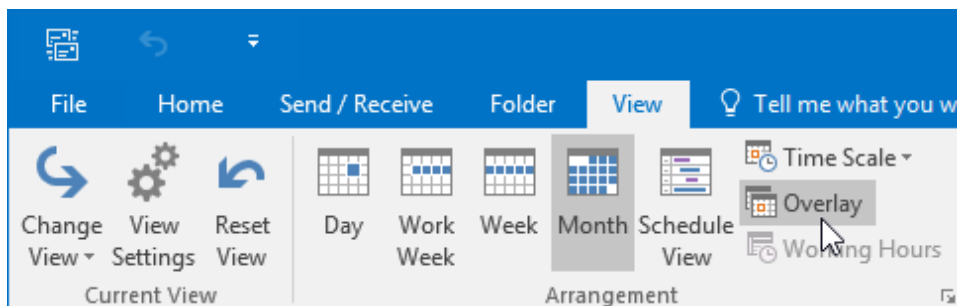


OVERLAY CALENDARS

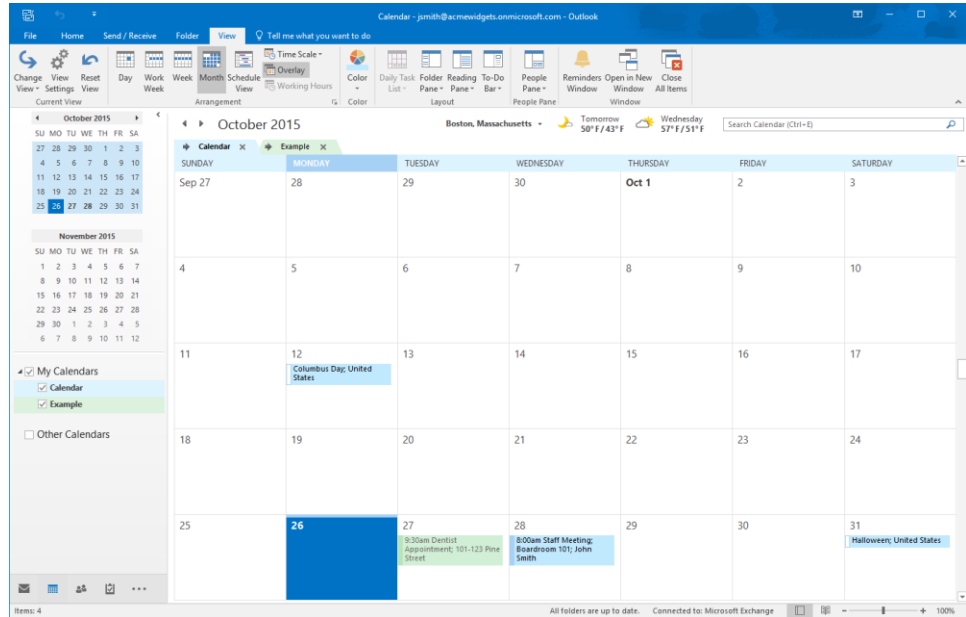
By default, any additional calendars that are added to the Calendar workspace in Outlook are placed side-by-side with any existing calendars. This configuration allows you to compare calendars, as well as focus on one calendar without the other getting in the way:



However, for some situations it can be useful to have additional calendars overlaid into one merged calendar. To toggle this option, click View → Overlay:



Any calendars that are currently open or are opened in the future will be shown on just one calendar. Appointments are color-coded to help you differentiate which items appear in which calendar and all secondary calendar appointments will appear slightly transparent:



You can switch which calendar is the primary one by clicking on the tab of the calendar that you would like to switch to, just below the ribbon:



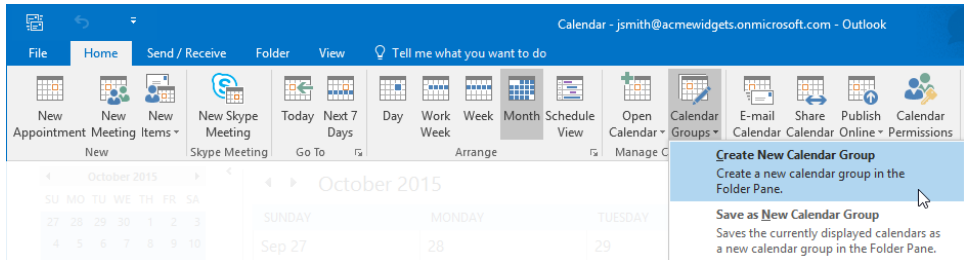
To return to the default side-by-side configuration, toggle the View → Overlay command.

CALENDAR GROUPS

Calendar groups are collections of user calendars that are displayed within the Calendar workspace in Outlook 2016. Typically you would create these groups so that you could quickly view the free/busy information for multiple people and coordinate a meeting using that information.

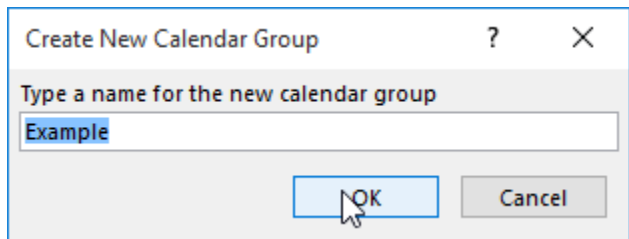
CREATING CALENDAR GROUPS

To create a new calendar group, first open the Calendar workspace. Then, click Home → Calendar Groups → Create New Calendar Group:

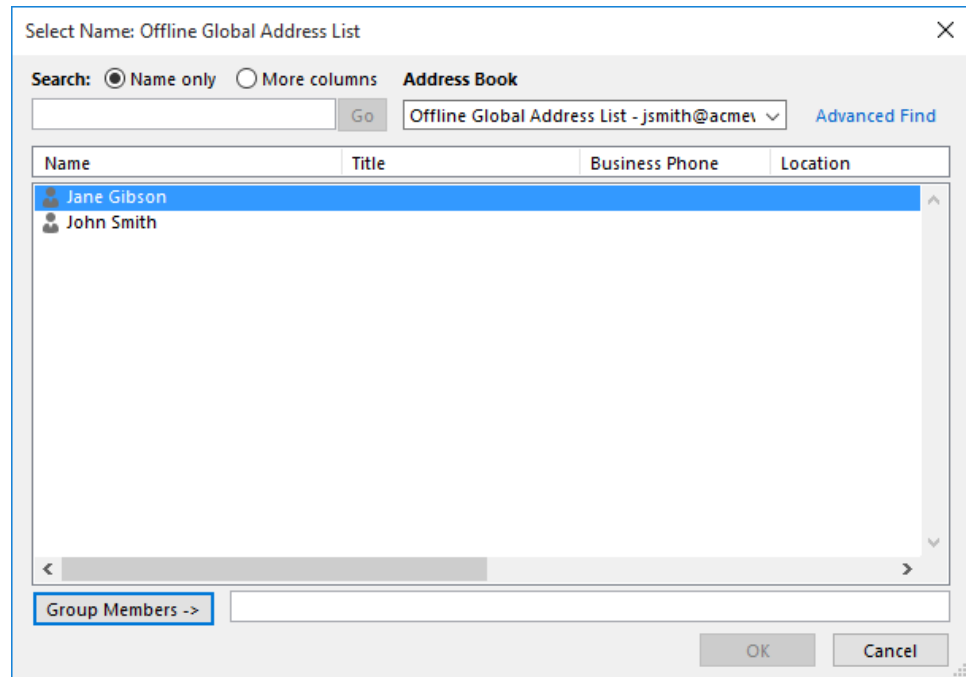


(Alternatively, you could click “Save as New Calendar Group” if you are viewing multiple calendars at once in the Calendar workspace and would like to save those calendars as a group.)

At this point you will be prompted to give the new calendar group a name:

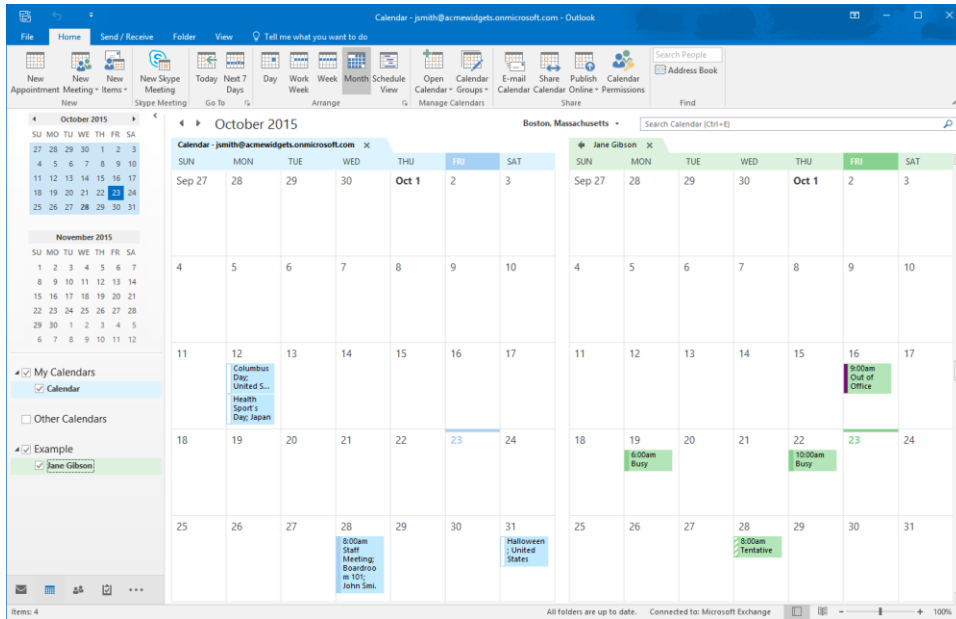


Once you do so, you will be given the option to select the contacts whose calendars you would like to add to the group:



Simply click the desired contact(s) and click the Group Members button to add them. Click OK when you are finished.

After adding contacts as group members and clicking the OK button, you will be returned to the Calendar workspace in Outlook. The new calendar group will be listed in the Navigation pane using the group name that you previously set. Checking the checkbox that corresponds to the group name will display all of the calendars in the group (including your own) at once:

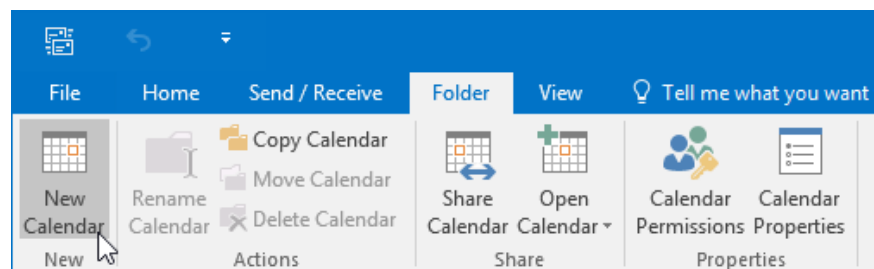


ACTIVITY 3-2

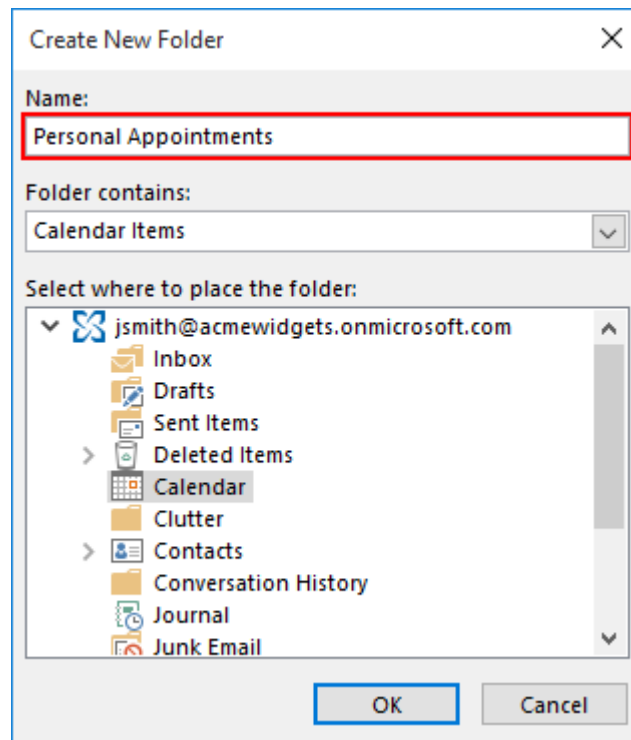
Managing Additional Calendars

To help keep your work and personal appointments separate, you would like to add a new additional calendar to the Calendars workspace. Additionally, you would like to overlay these two separate calendars so that they are displayed at the same time on the same calendar.

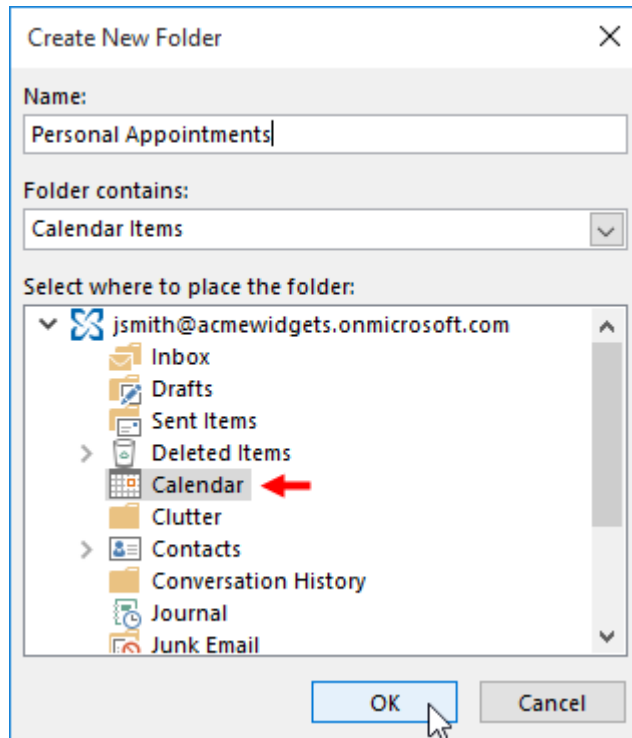
1. To begin, open Outlook 2016 and ensure that the Calendar workspace is displayed.
2. Click Folder → New Calendar:



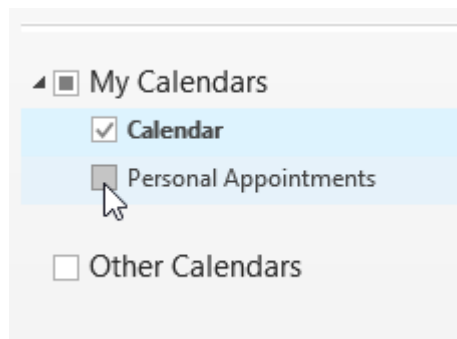
3. The Create New Folder dialog box will be displayed. Type “Personal Appointments” into the Name text box:



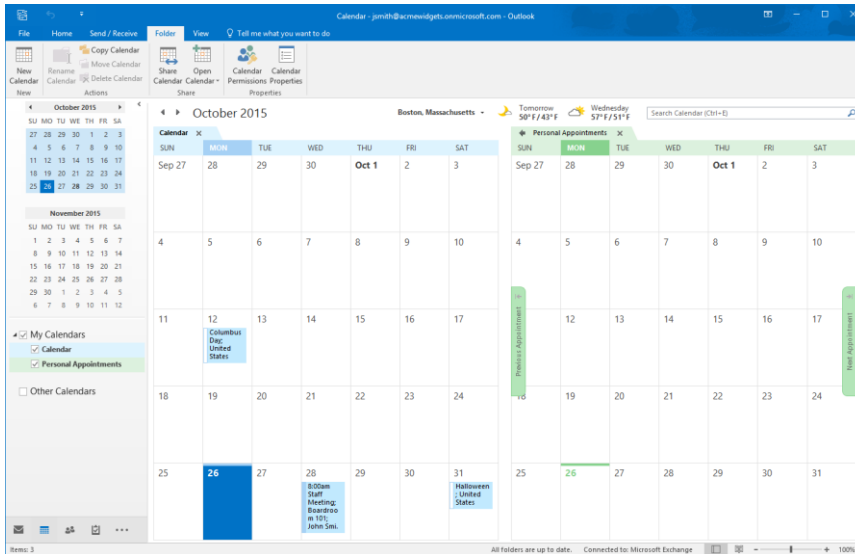
4. Ensure that the Calendar item is selected in the “Select where to place the folder” list. Click OK:



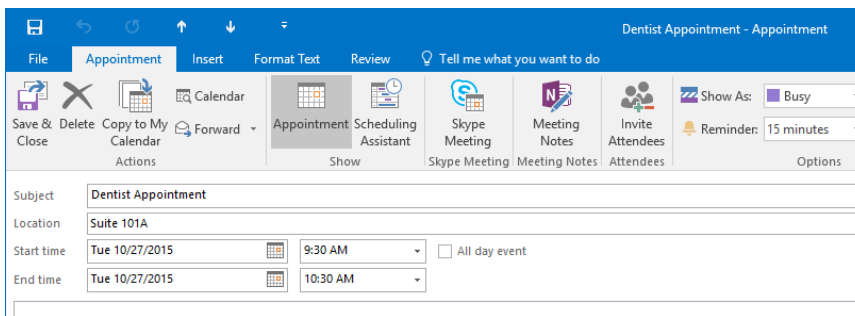
5. The new calendar will be created and you will be able to see it listed in the Navigation pane, inside the My Calendars section. Check its associated check box to display it:



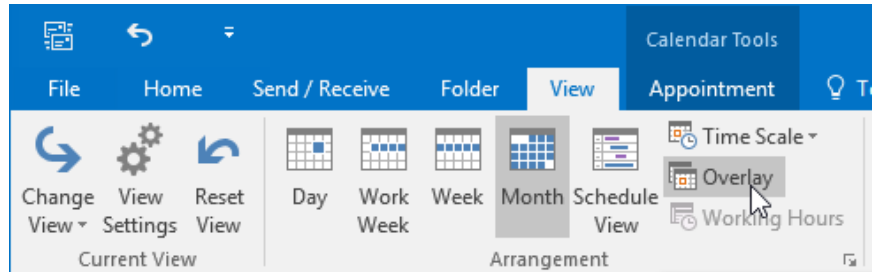
- Both your default calendar and the new Personal Appointments calendar will be displayed side-by-side in the Calendar workspace:



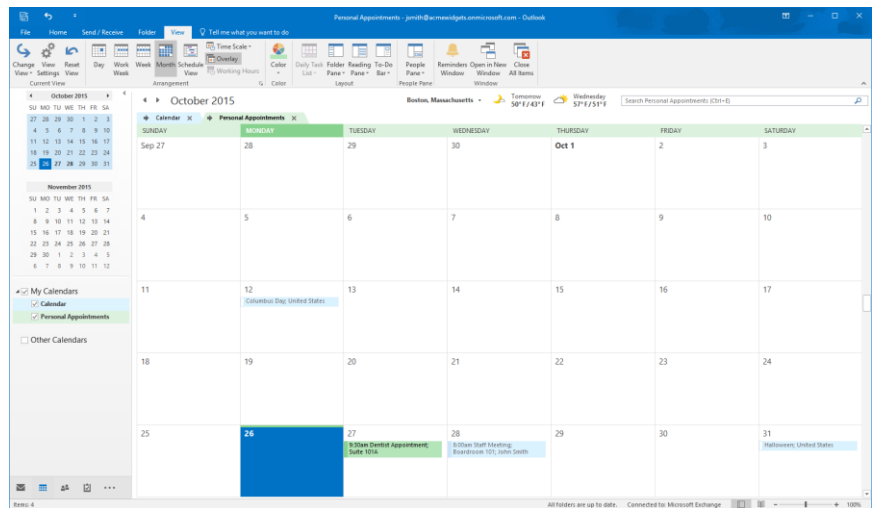
- In the Personal Appointments calendar, create a new appointment for tomorrow from 9:30 AM to 10:30 AM. In the Subject field, type "Dentist Appointment" and the Location field type "Suite 101A:"



- Now you need to overlay these two calendars so that they show all of their appointments in the same, merged calendar. Click View → Overlay:



- The two calendars will now be overlaid with each other and appointments from both calendars will be displayed:



(Note that if you still had a date in the Personal Appointments calendar selected, Outlook will make that the primary calendar.)

- Close Microsoft Outlook 2016 to complete this activity.

TOPIC C: Manage Meeting Responses

Once you have found an appropriate time that works for all attendees and you send out a meeting request, you then need to deal with the responses. Over the course of this topic you will learn about the various meeting responses that you may receive, as well as how to manage them.

Topic Objectives

In this topic, you will learn:

- About meeting responses
- How to manage meeting responses
- About the Tracking command

MEETING RESPONSES

When you send a meeting request to a group of contacts, you will receive a range of automatic responses. These responses are sent to you automatically when a recipient of the request chooses to accept, tentatively accept, or decline your invitation. While these responses are easily manageable when working with a small group, larger groups and more frequent meetings can cause your mailbox to be cluttered with them.

MEETING RESPONSE MANAGEMENT

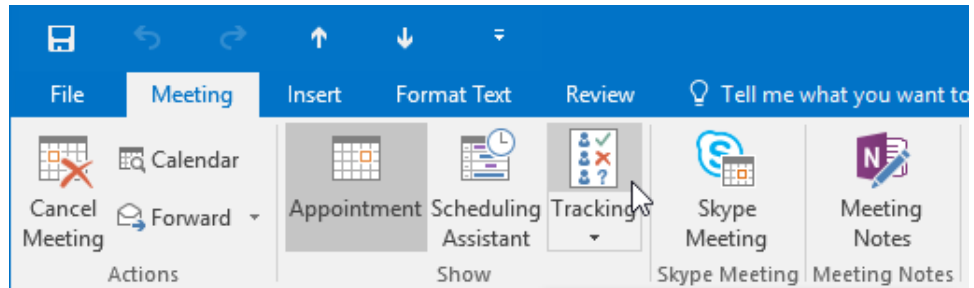
The primary method to manage meeting responses is the **Rules** feature. This feature allows you to have the responses moved to a folder that is dedicated to hold these types of messages, or even delete them automatically.

You can also use Outlook's built-in Tracking function, which will be discussed next.

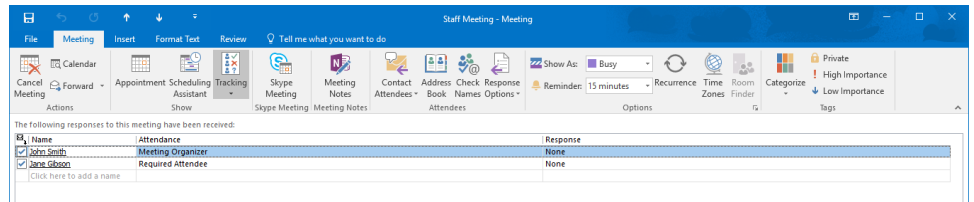
THE TRACKING COMMAND

While managing the automatic messages that you receive in response to a meeting request can be handled using the Rules feature, the **Tracking command** has been provided so that you can easily see how your attendees have responded. It does this by presenting all of your attendees in a list with their attendance status, as well as their responses.

To use the Tracking command, open the meeting entry from your calendar and click Meeting → Tracking:



You will then see the list of attendees and their responses.

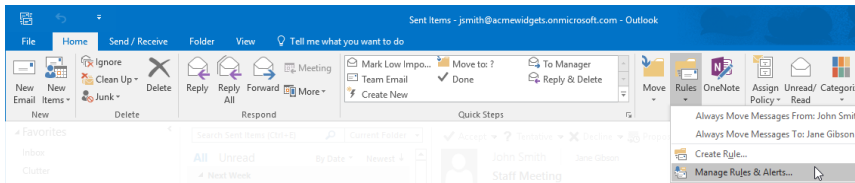


ACTIVITY 3-3

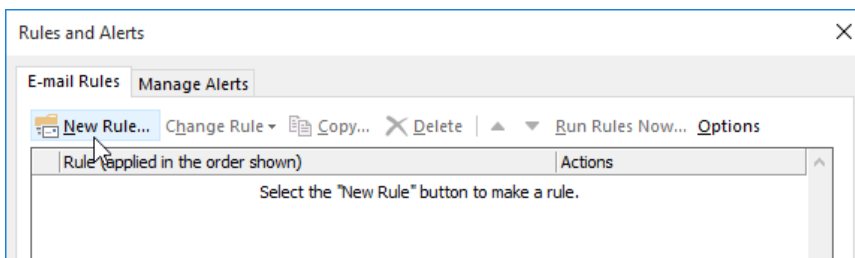
Manage Meeting Responses

You are frequently required to organize meetings and the responses are cluttering up your inbox. To help manage these responses, you would like to create a rule that will move all of these responses to a specific folder.

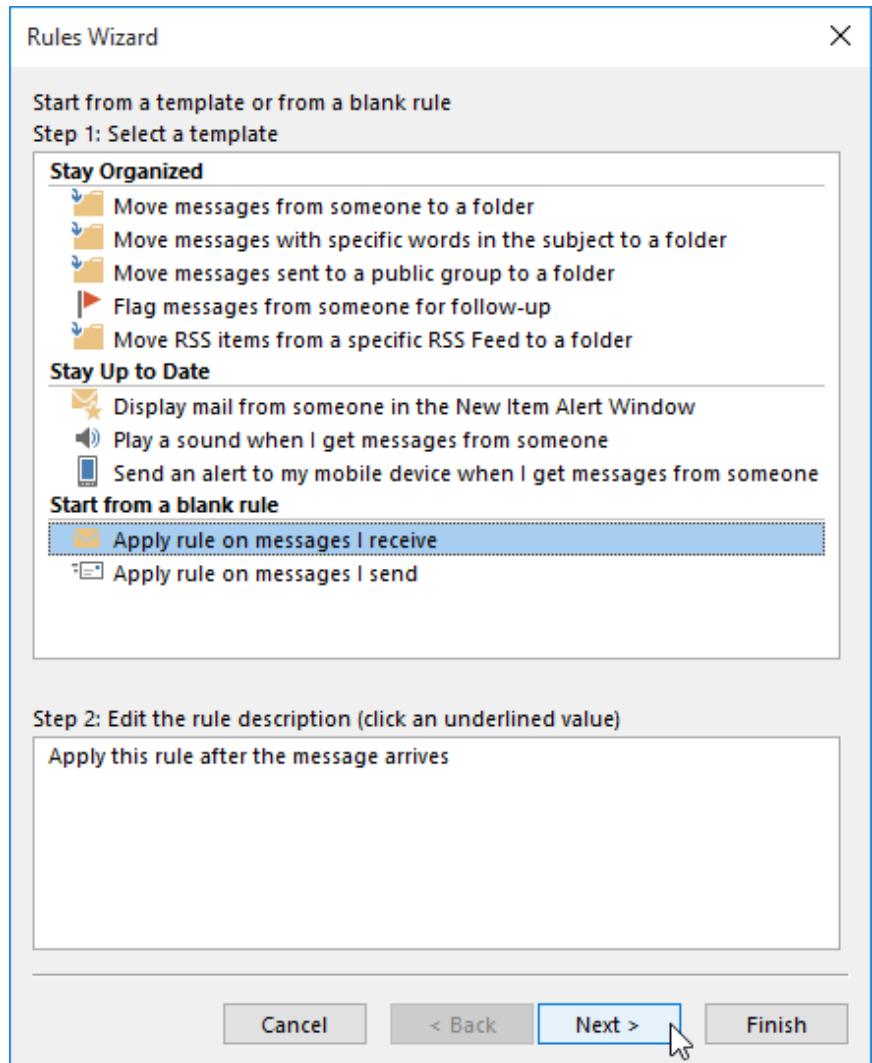
1. To begin, open Outlook 2016 and ensure that the Mail workspace is displayed.
2. Click Home → Rules → Manage Rules & Alerts:



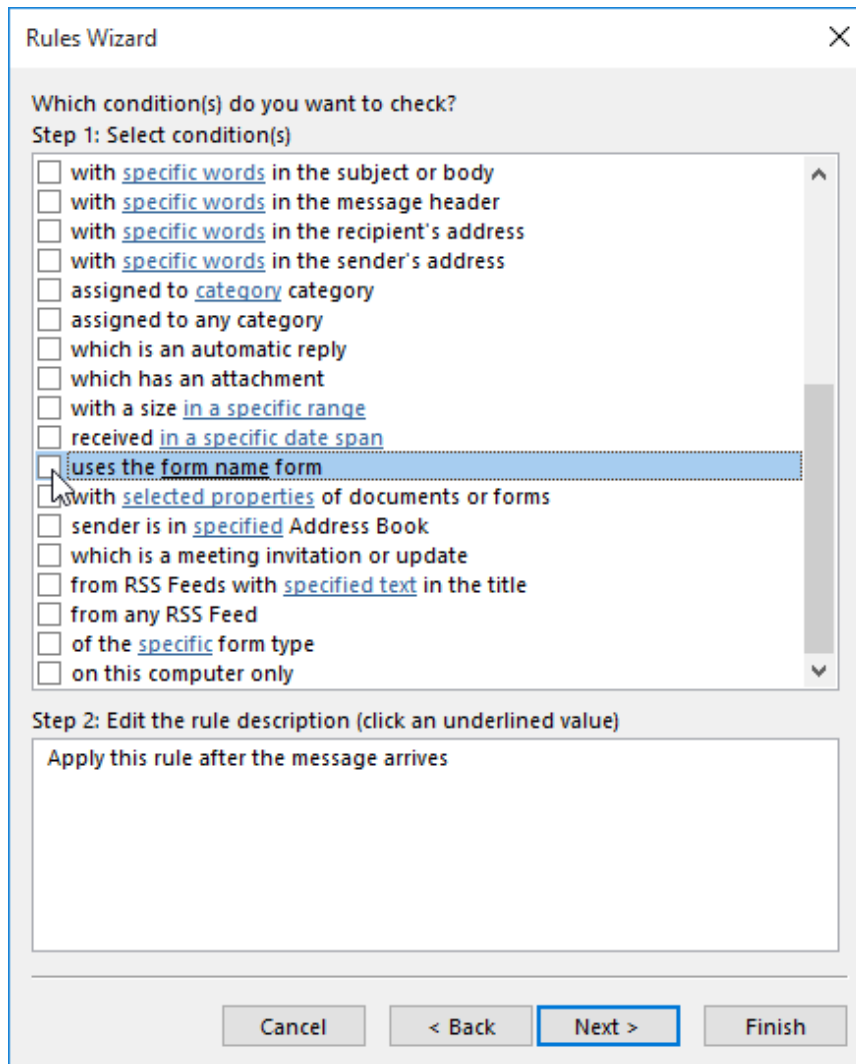
3. The Rules & Alerts dialog box will now be displayed. Click the New Rule button near the upper left-hand corner:



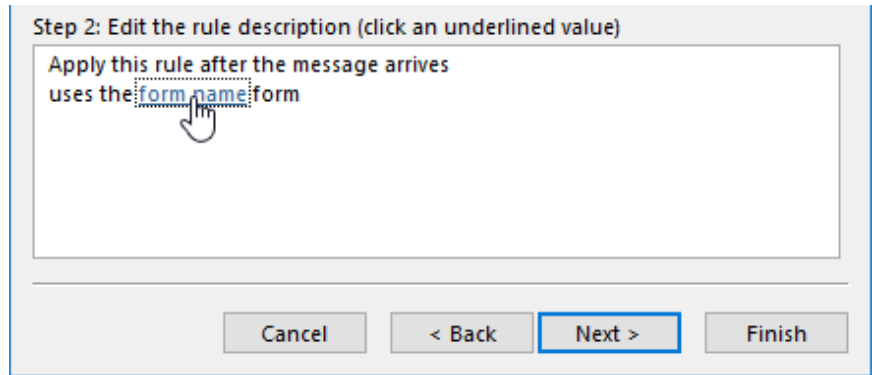
4. Inside the Rules Wizard, click to select the “Apply rule on messages I receive” option and click Next:



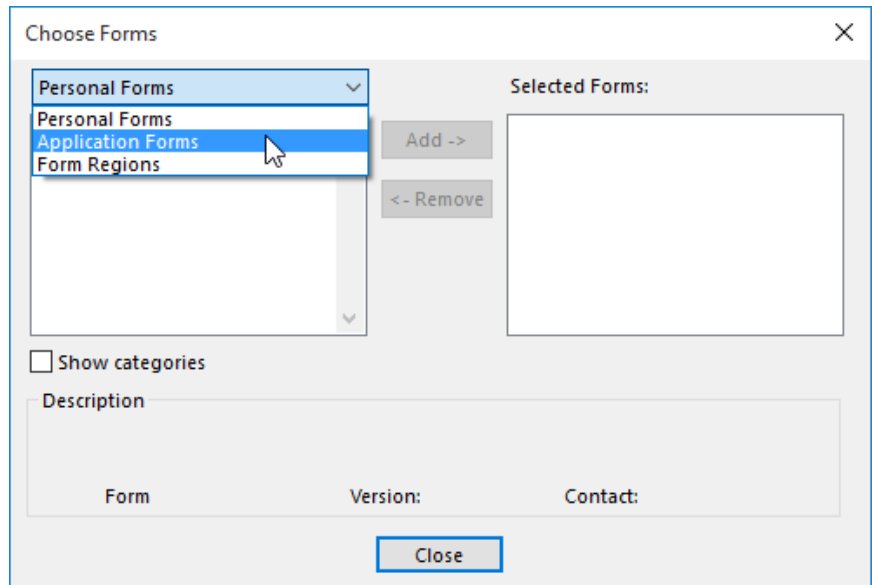
5. At this point you need to add conditions for this new rule to work. Scroll down through the various conditions that are listed. Check the “uses the form name form” checkbox:



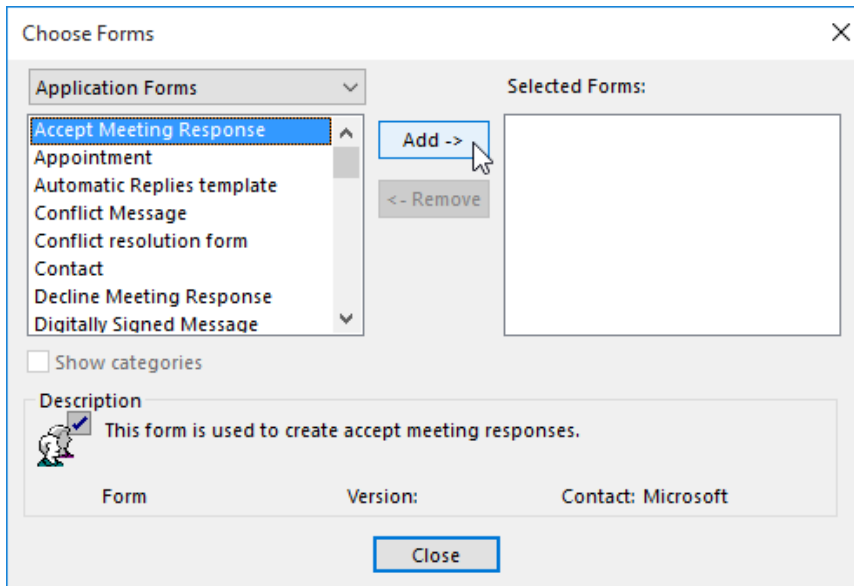
6. Lower in this dialog box, click the underlined text “form name:”



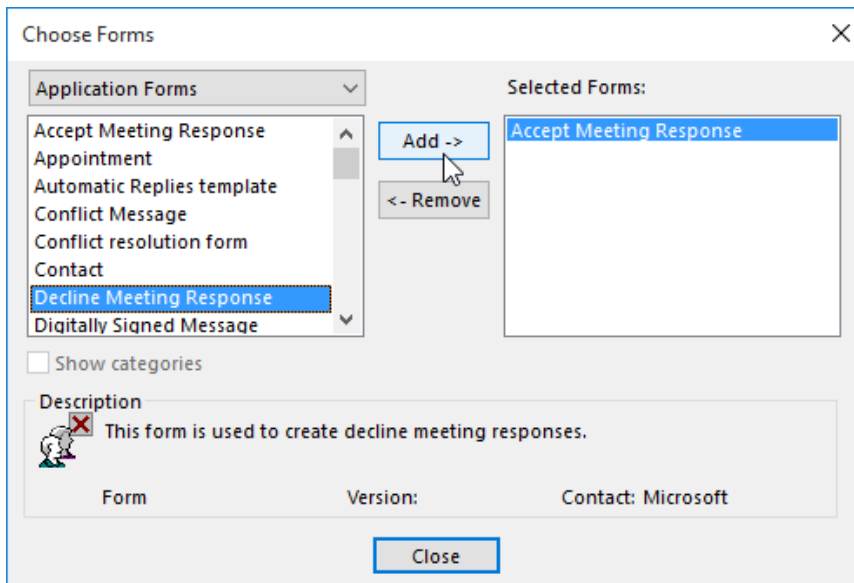
7. The Choose Forms dialog box will now be displayed. Click the drop-down menu near the upper left-hand corner of this dialog box and click “Application Forms:”



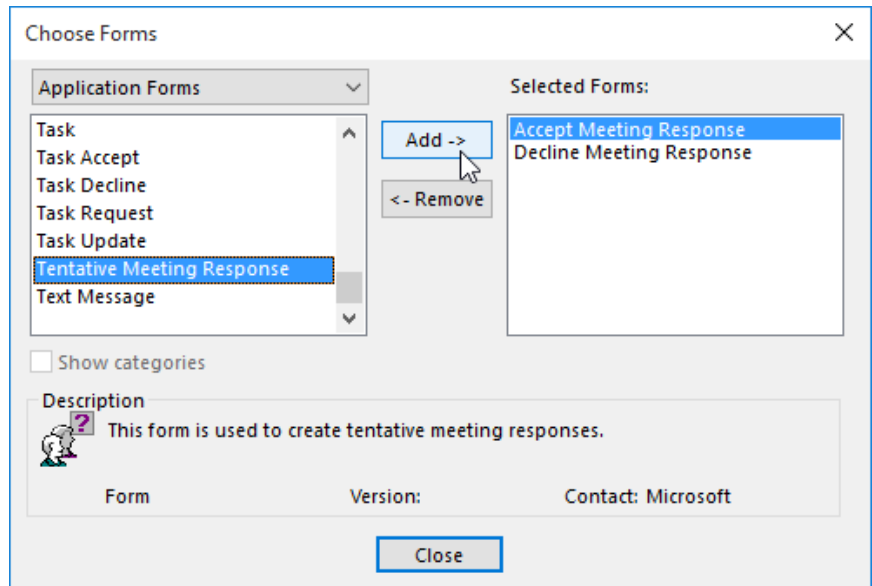
- From the options listed, click the Accept Meeting Response option and then click Add:



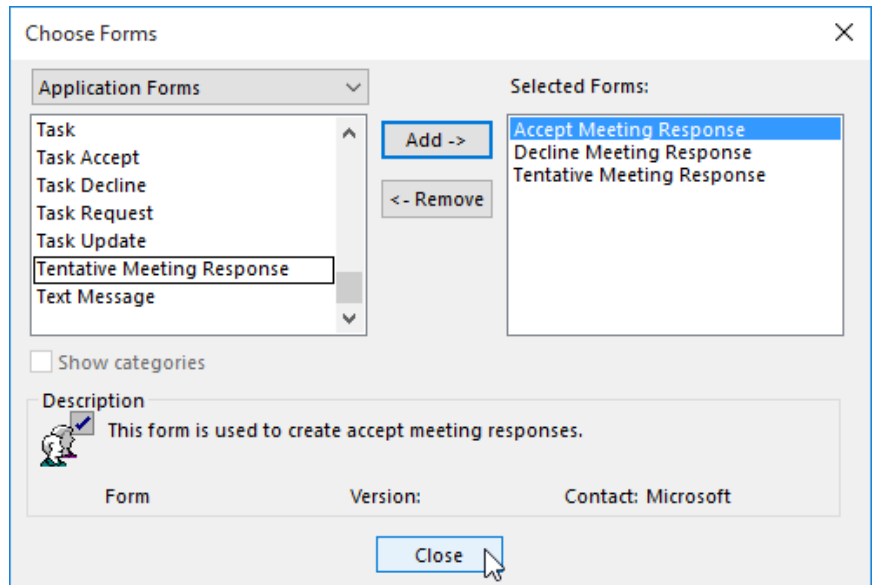
- Lower in this list, click the Decline Meeting Response option and then click the Add button:



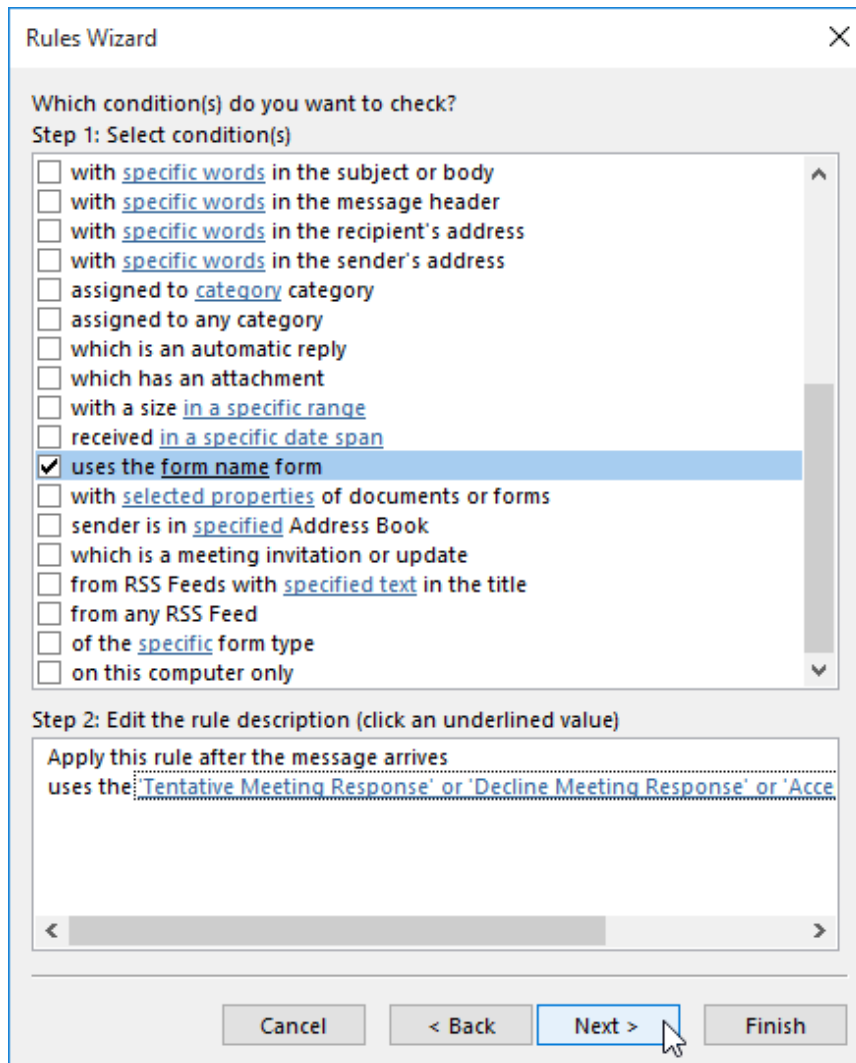
- Next, scroll through the options and click to select the Tentative Meeting Response option. Click Add:



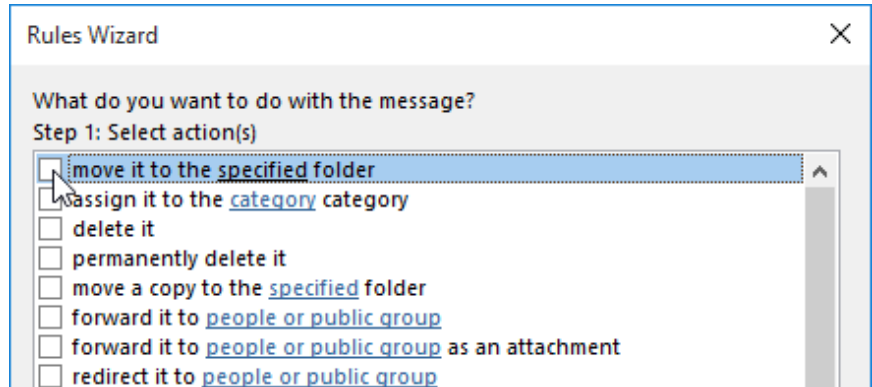
- Click the Close button:



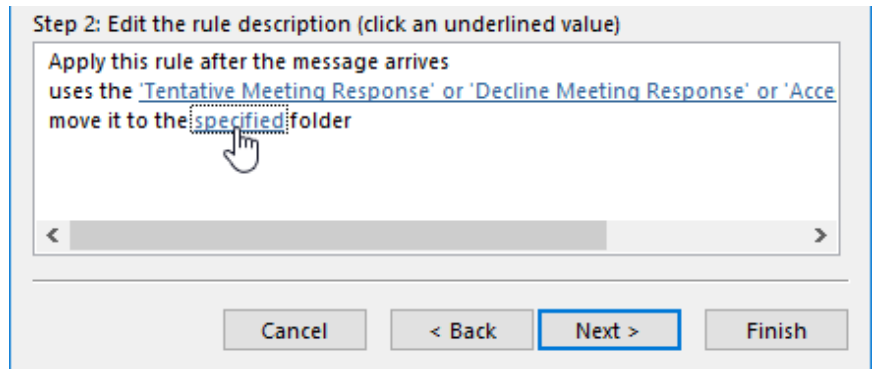
12. Back in the Rules Wizard, click Next to continue:



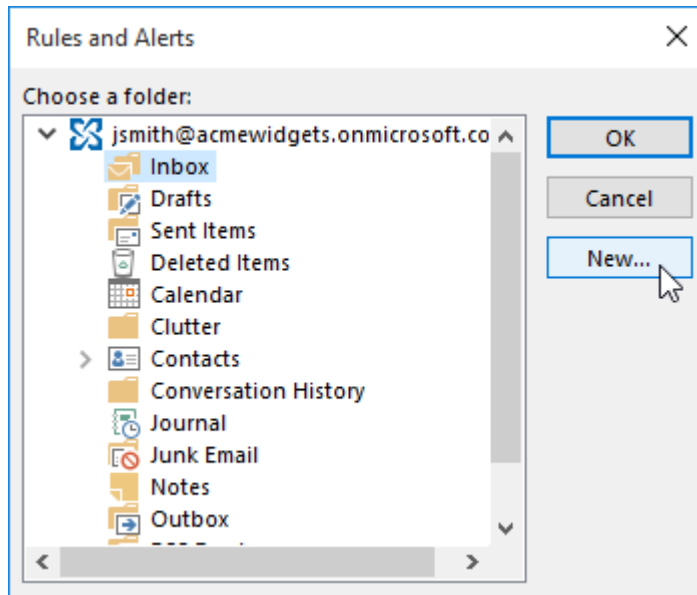
13. At this point in the Rules Wizard, you need to choose what action you would like to take when you receive such a message. For this example, check the “move it to the specified folder” action:



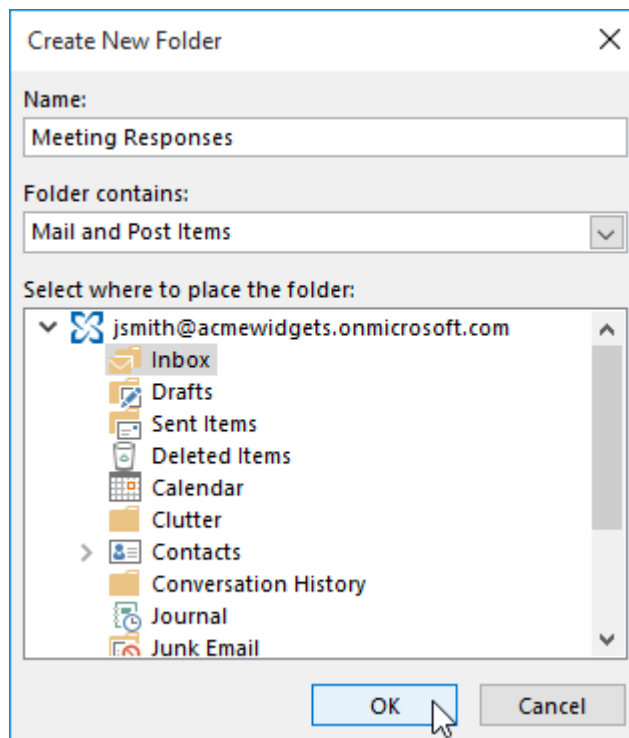
14. Lower in the dialog box, click the underlined text “specified:”



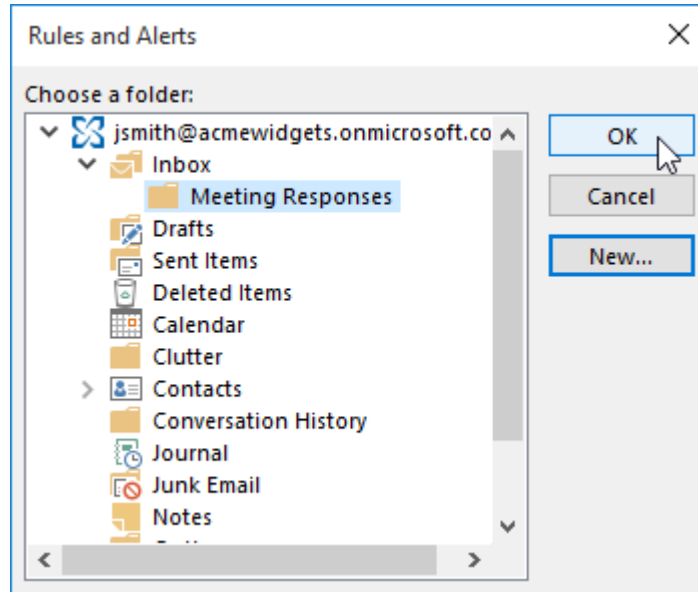
15. The Choose Folder dialog box will now be displayed. From the provided list, click the Inbox option. Click New:



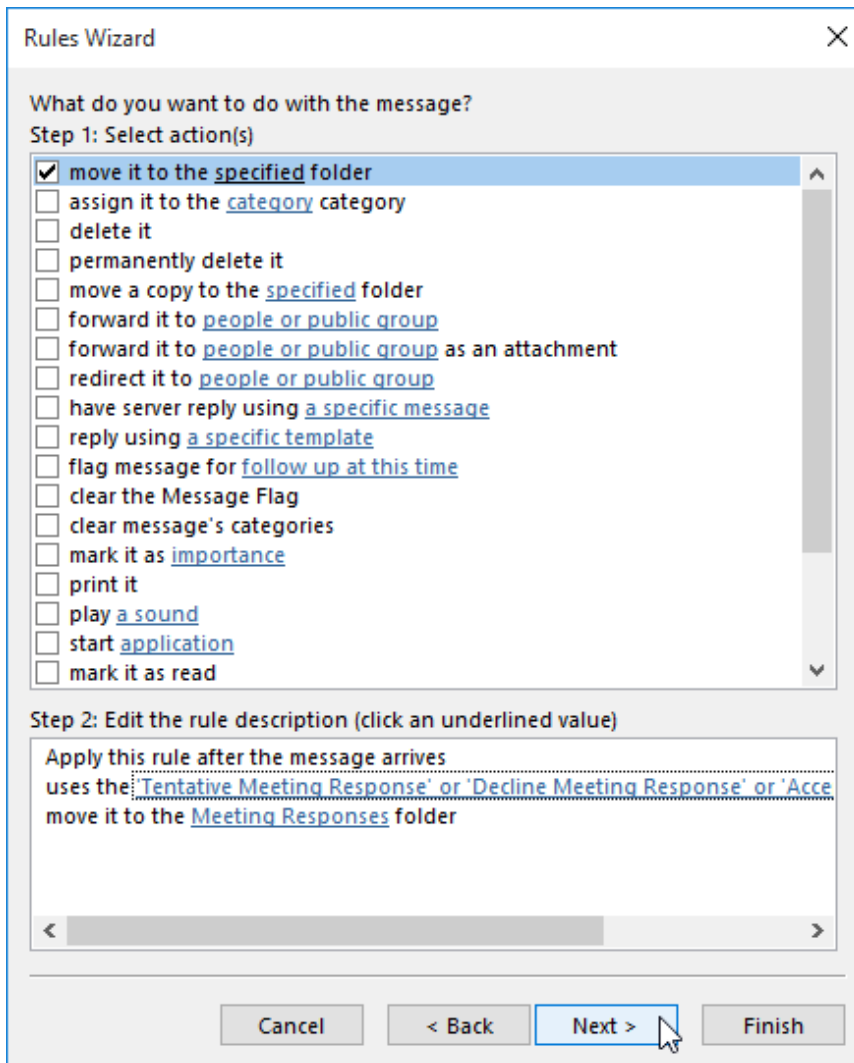
16. The Create New Folder dialog box will now be displayed. Inside the Name text box, type "Meeting Responses" and then click OK:



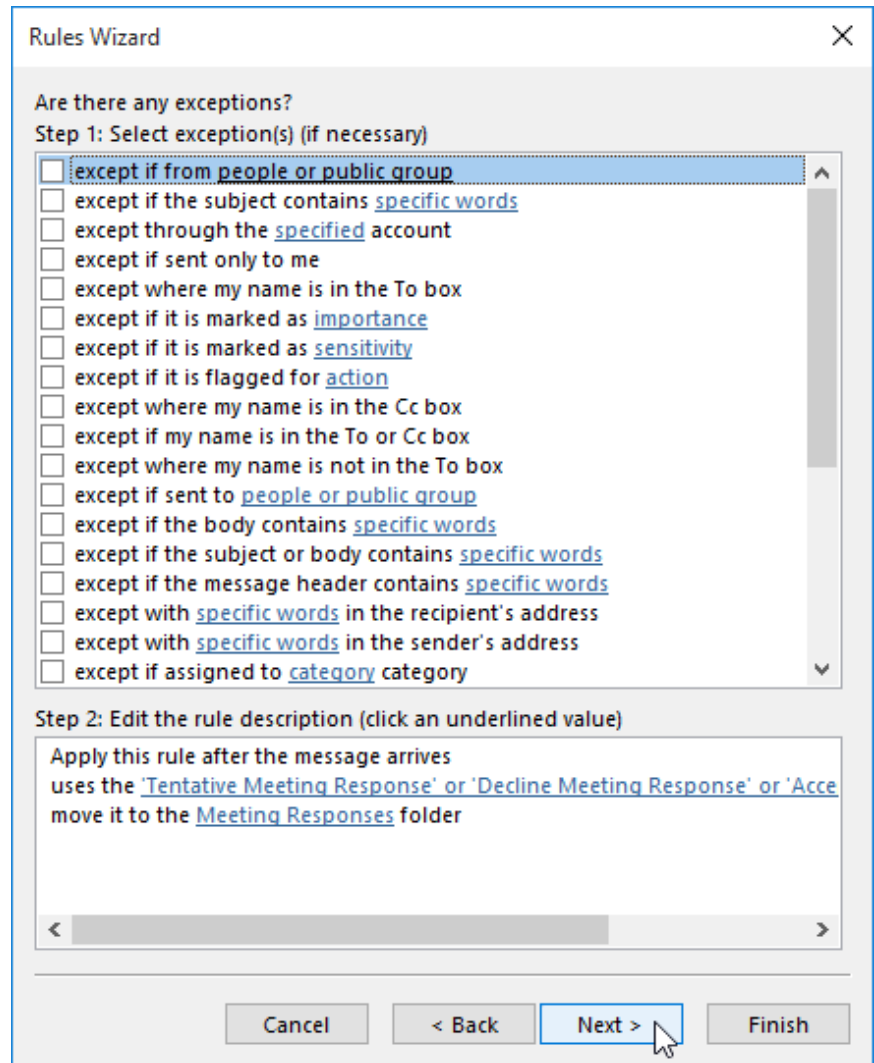
17. Returning to the Rules and Alerts dialog box, ensure that the folder that you just created is selected. Click OK:



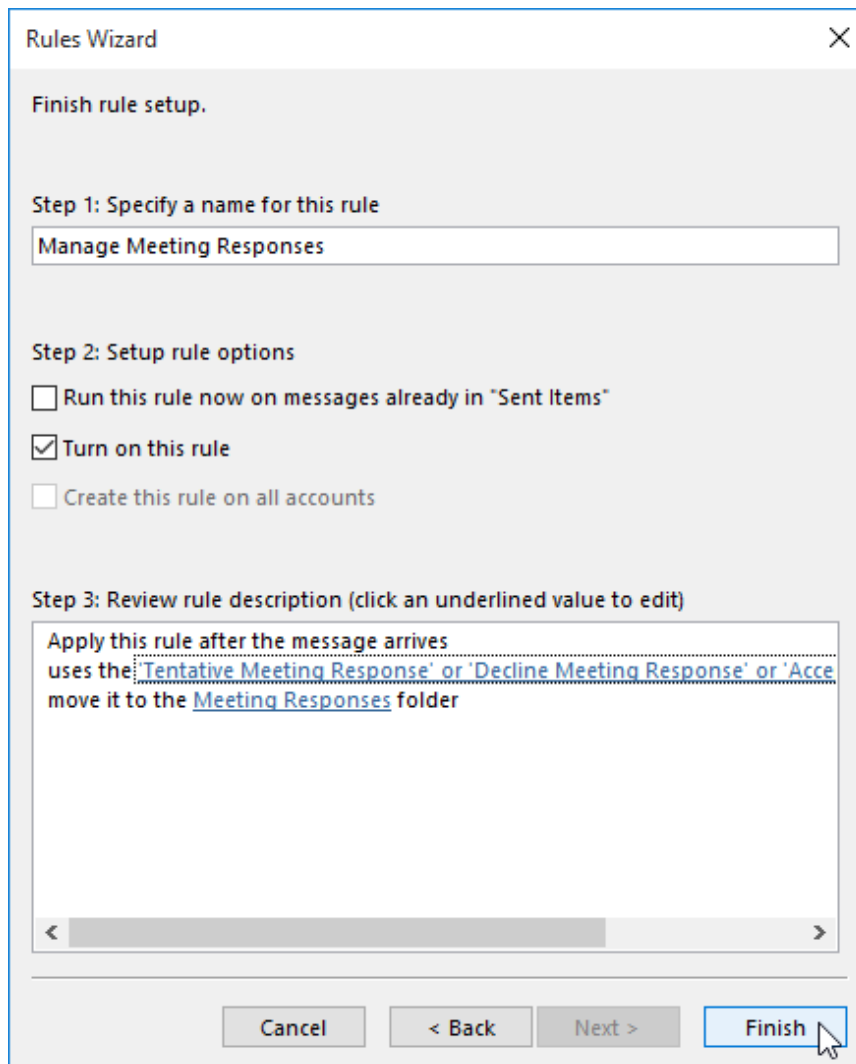
18. Returning to the Rules Wizard, click the Next button:



19. For this example, you will not need any exceptions to this rule. Click Next to continue:



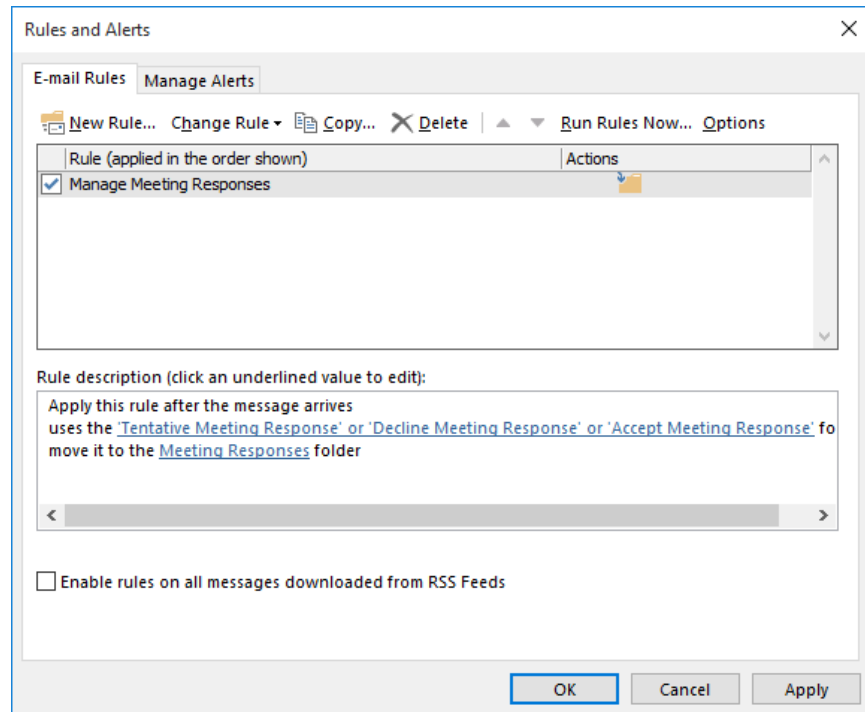
20. Now that you have reached the last stage of this wizard, you are given the option to give this new rule a name as well as modify a few other options. Type “Manage Meeting Responses” into the first text box and then click Finish:



21. If you see a warning dialog box that informs you that this rule is client-only, click OK to continue.

(A client-only rule is a type of rule that will only run while Outlook is open. In this case, that means that if you receive a meeting response while Outlook is closed, it will still go to your inbox.)

22. Back at the Rules and Alerts dialog box, you will see the new rule listed here. You will note that it has been enabled automatically:



(Note that if you do not wish to use this rule, you can deselect its corresponding checkbox.)

23. Close Microsoft Outlook 2016 to complete this exercise.

TOPIC D: Assign and Manage Tasks

To keep track of and manage tasks, Outlook has provided the Tasks workspace. Using this workspace you are able to create new tasks and assign them to yourself or others to complete. Over the course of this topic, you will learn how to assign tasks to other people and manage them.

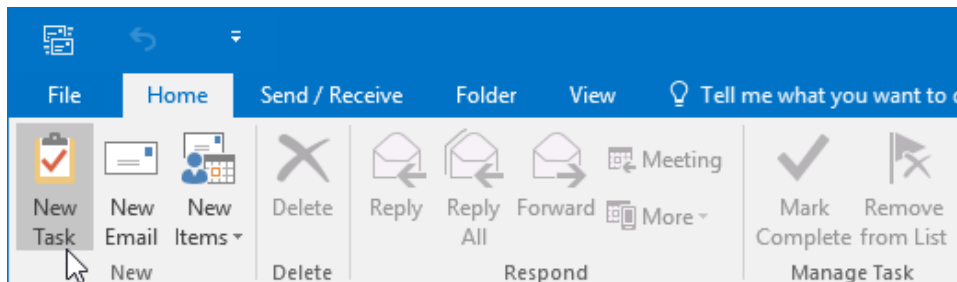
Topic Objectives

In this topic, you will learn:

- About the Task Request form
- About task reply options
- How to view task details
- How to send status reports
- About task options

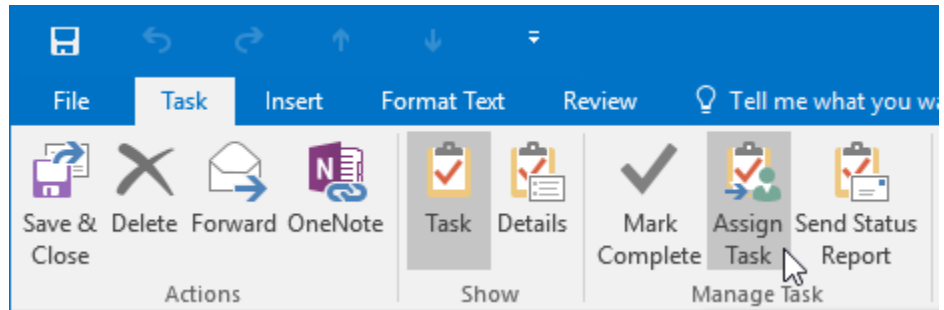
THE TASK REQUEST FORM

The Task Request form is used to create a new task, assign it to another user, and request updates. To display this form, open the Tasks workspace and then click Home → New Task:

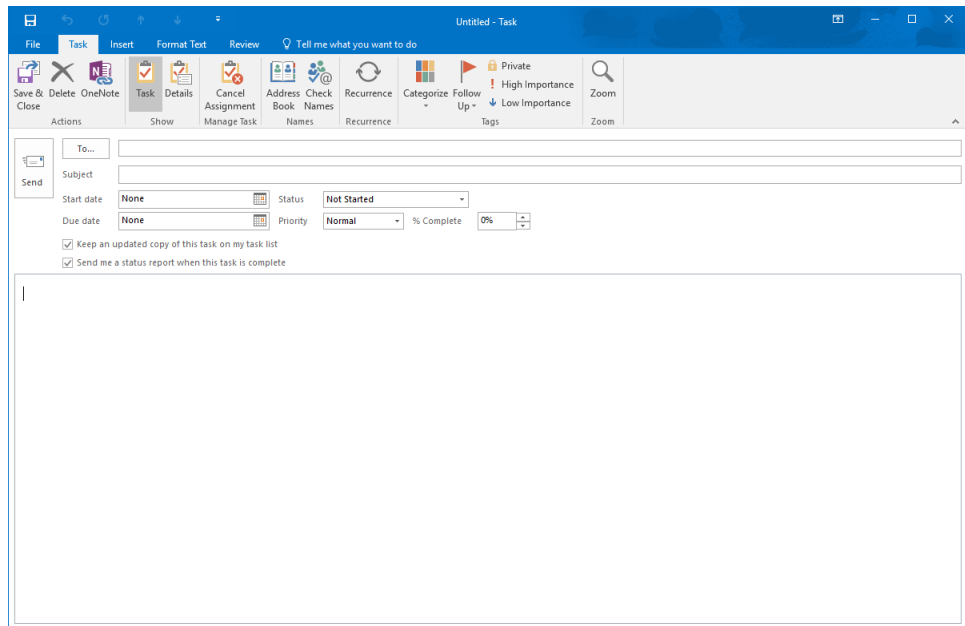


(Alternatively, you can also display the Task Request form while in the Mail workspace by clicking Home → New Items → Task.)

With the Task window displayed, click Task → Assign Task:



The Task window will then change to incorporate Task Request form tools:



Here is a breakdown of the various controls in this form:

- **To:** Just like a regular e-mail message, you can enter recipient information into this text box. The recipient(s) that you enter here are then assigned this task when it is sent.
- **Subject:** Enter a brief description of what the task is.
- **Start date:** Use this date picker to choose a start date for this task.
- **End date:** Use this date picker to choose an end date for this task.
- **Status:** Using this drop-down menu, you are able to assign this task a status (Not Started, In Progress, Completed, Waiting on someone else, or Deferred).
- **Priority:** This drop-down menu is used to assign a priority level for the current task (Low, Normal, or High).
- **% Complete:** This increment box allows you (or the recipient) to choose the percentage of completion for the task.
- **Keep an updated copy of this task on my task list:** Checked by default, this will display the task in your Tasks list. Deselect this option if you would prefer this not to happen.
- **Send me a status report when this task is complete:** Checked by default, this option will have you notified via a status update when the task is completed.
- **Task body:** In this large text area, you can enter the details about the task.

Status Options

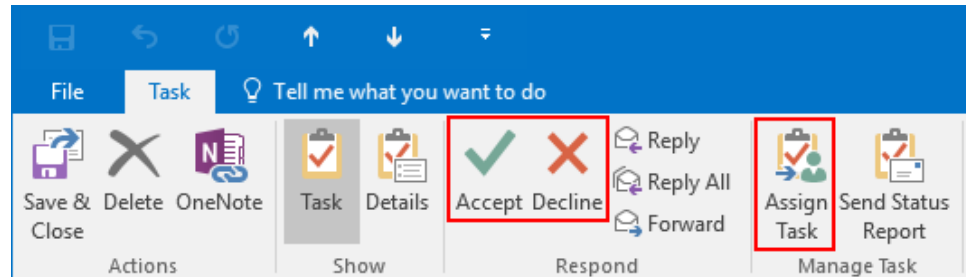
Tasks that you assign to yourself or others can have one of five status levels. Some of these levels will directly affect the content of the % Complete field and vice versa. Below is a breakdown of what each status option does and what its effects are:

- **Not Started:** This is the default status of every task that is created and assigned. If this status is selected, the % Complete field will automatically be set to 0%.
- **In Progress:** This status is used to indicate that the task is being actively worked on. If the % Complete field is changed to any value other than 0% and 100%, this status will be applied automatically.
- **Completed:** Used to indicate when a task is done. This status will automatically change the % Complete field to 100%.
- **Waiting on someone else:** This status is chosen when the task needs work or assistance provided by someone else. When this status is chosen, the % Complete field can be any value between 0% and 99%.

- **Deferred:** Choosing this status option indicates that the task has been put aside until a later date. When this status is chosen, the % Complete field can be any value between 0% and 99%.

TASK REPLY OPTIONS

Once a task has been assigned to you, you will be provided with different reply options inside the Respond and Manage Task groups in the Task window:



Depending on the reply that you choose, a series of actions will take place:

- **Accept:** By clicking the Accept option, your response will immediately be sent to the person who assigned you this task. The task will then be moved to the Tasks list in the Tasks workspace. From here, you can then work with the task as you would any other.
- **Decline:** Clicking this option will return the task to the sender indicating that you declined the request. The task request will automatically be deleted from your message list and the sender can then assign the task to someone else if they wish.
- **Assign Task:** Clicking this command allows you to reassign this task to someone else. They can then choose to accept or decline it. If they choose to accept it, then they will take complete ownership of the task, but their response is sent to you instead of the original sender.

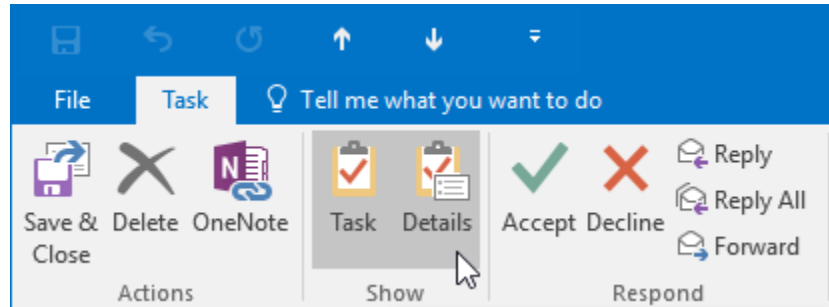
To-Do List vs. Tasks List

It is important to remember that the To-Do list and the Tasks list are not the same thing. While you can find both of these options inside the Navigation pane of the Tasks workspace, they have different purposes. The To-Do List is designed to list any Outlook item that has been flagged for follow-up. On the other hand, the Tasks list will only display actual tasks that were created by, or assigned to, you. This means that tasks can be shown in both the To-Do List and Tasks List; however, the To-Do List

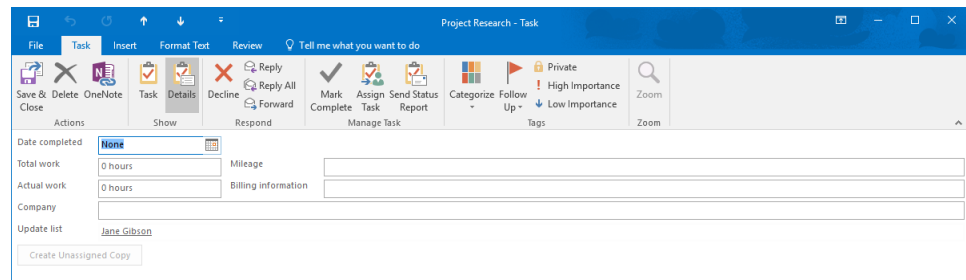
will also show any other Outlook items that have been marked for follow-up.

TASK DETAILS

More details can be added to a task using the Details portion of the Task window. To access this view, click Task → Details:



Once displayed, you can see that the Details section includes several additional controls:



(Note that if this task was sent to you, these text boxes will appear grayed out until you accept the task.)

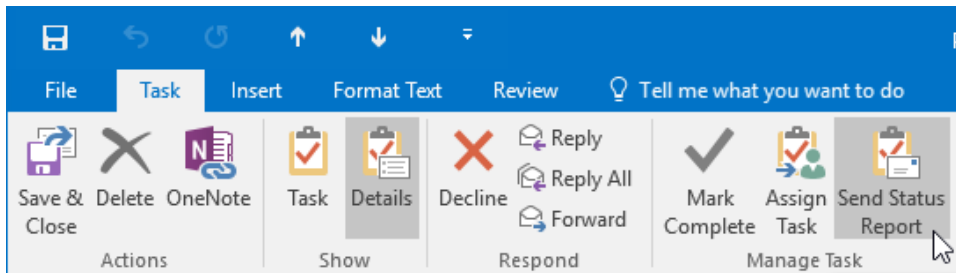
Here is a breakdown of the various controls that you can find in this form:

- **Date completed:** This date picker control allows you to select an exact date to indicate when the current task was completed.
- **Total work:** Enter the total number of hours that were spent on this task.
- **Actual work:** Enter the actual number of hours that were spent on this task.
- **Company:** Enter the organization whose resources you used to complete the task, or who this task was completed for.
- **Mileage:** Track mileage that was used in the completion of this task.
- **Billing information:** Any information required for billing purposes can be entered here.
- **Update list:** View who has been assigned this task.

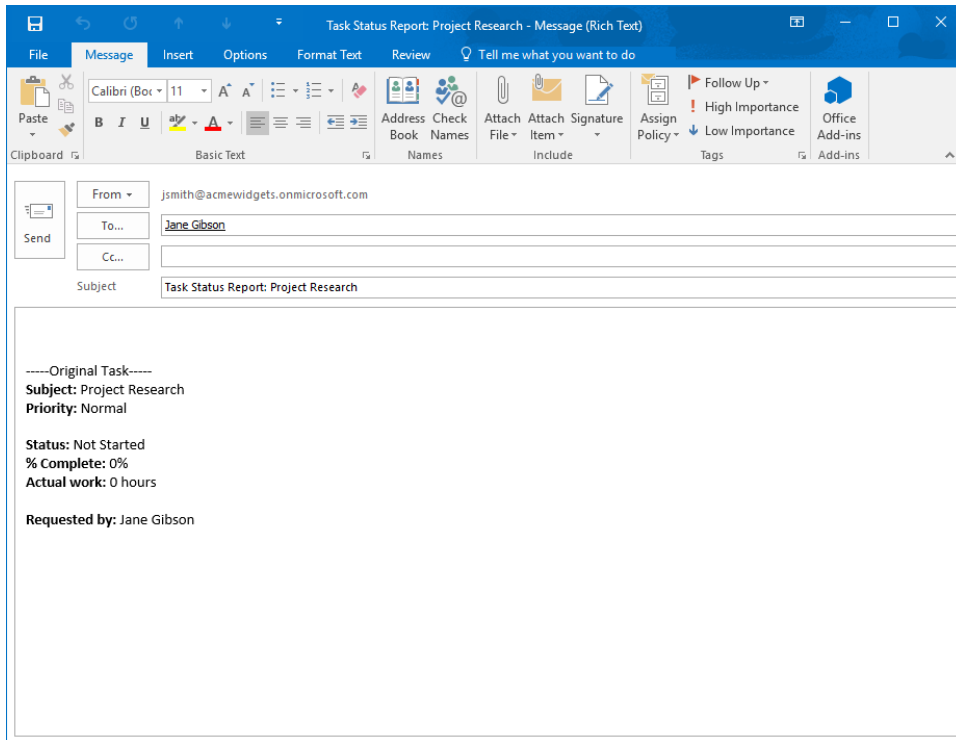
STATUS REPORTS

Status reports are messages that are sent to the person who assigned a task. They detail the overall completion progress of the task, including important information like the percentage of completion, hours spent on the task, and more.

To send a status report, open the task and click Task → Send Status Report:

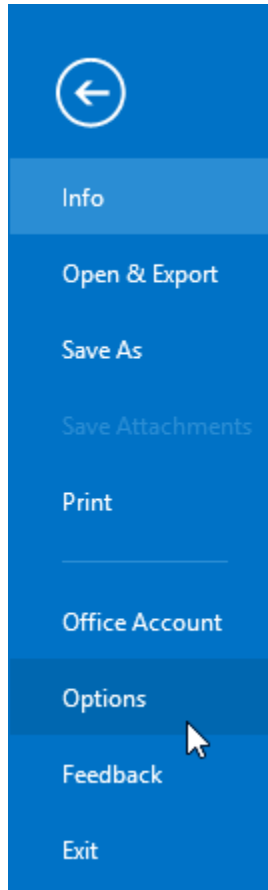


The status report will look just like a regular message, but with the task information listed in the body of the message. Just modify the message as needed, add a recipient, and then click the Send button:

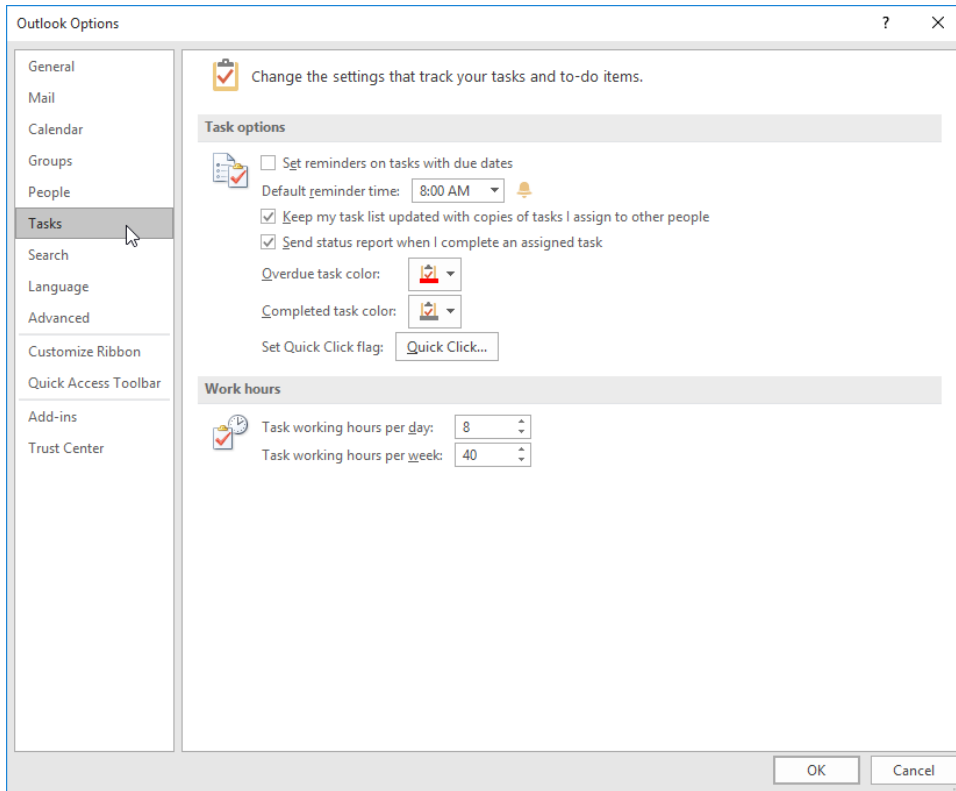


TASK OPTIONS

To change the default options for tasks, open the Outlook Options dialog box by clicking File → Options:



Then, display the Tasks category:



Here, you can choose the color of overdue and completed tasks and set update and reminder options. (Note that the update and reminder options will apply to future tasks only, while the color options will apply to all tasks.) When you have finished setting your options, click OK to apply them.

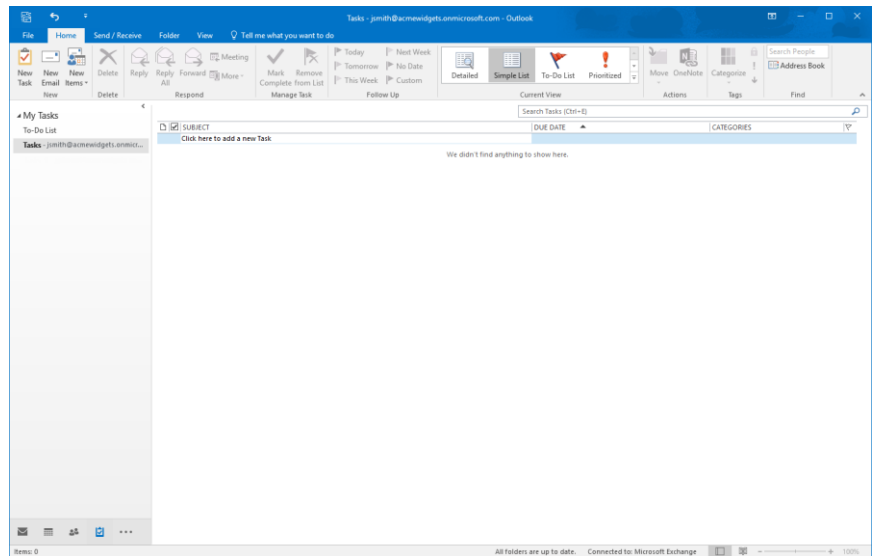
ACTIVITY 3-4

Assigning and Managing Tasks

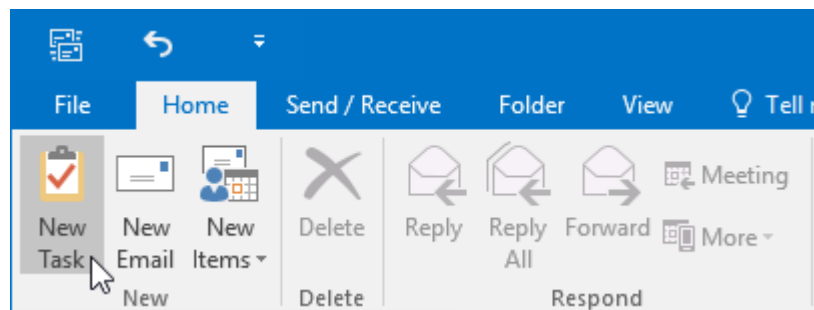
You need a colleague on your team to conduct some research for a project that you are both working on. In this activity, you will create a task and assign it to them.

Note that students need to pair up in order to complete this exercise. Both students should use a Microsoft Exchange Server e-mail account within the same organization.

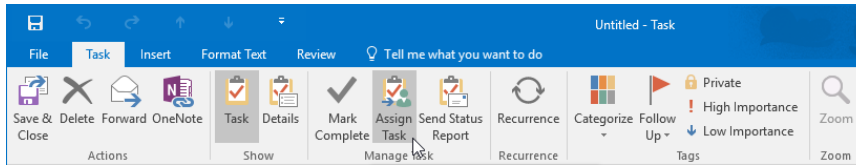
1. To begin, open Outlook 2016 and display the Tasks workspace:



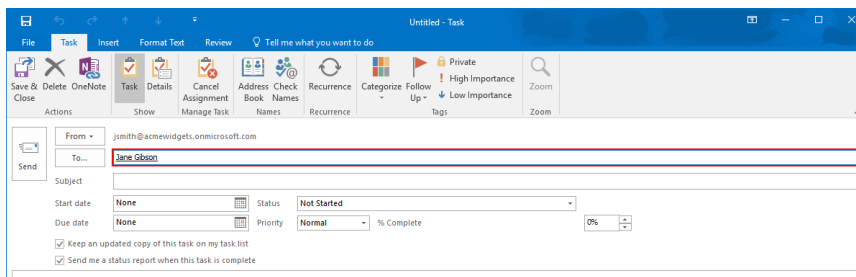
2. Create a new task by clicking Home → New Task:



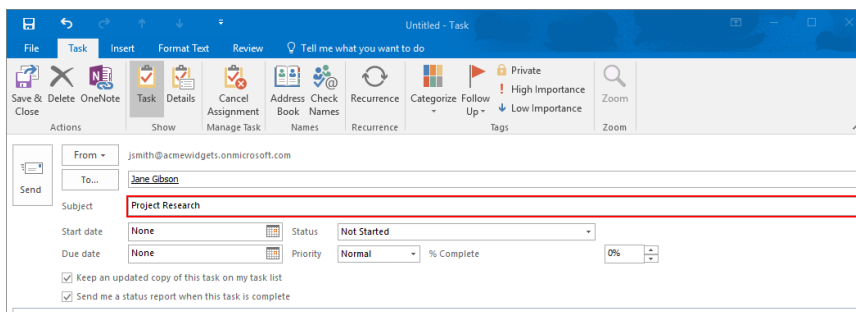
- The Task window will now be displayed. As you are assigning this task to someone else, click Task → Assign Task:



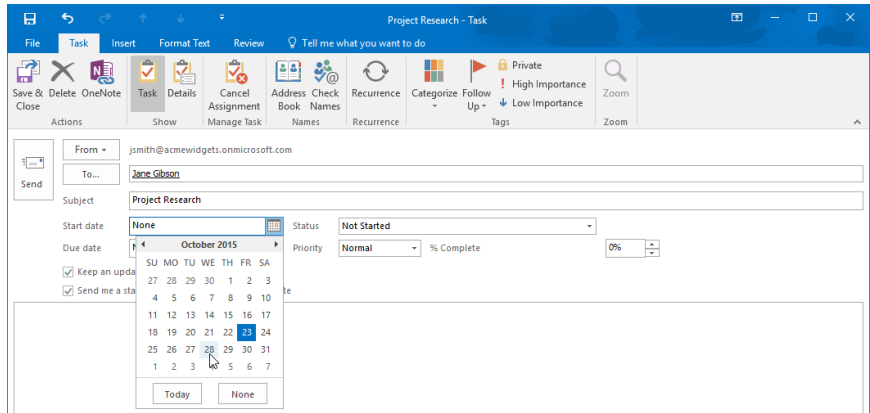
- The Task Request form will now be displayed. Type your partner's e-mail address into the To text box:



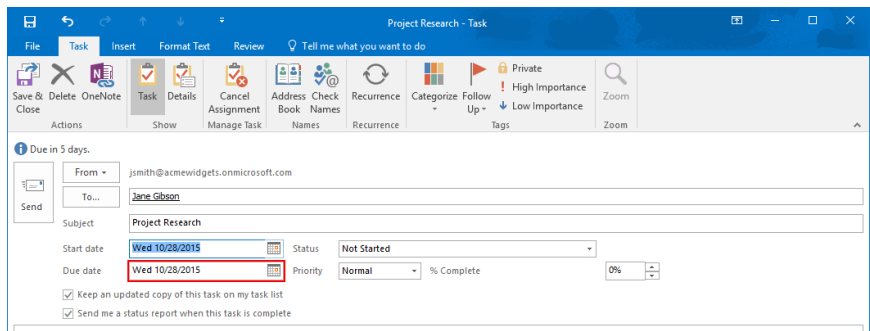
- In the Subject text box type "Project Research:"



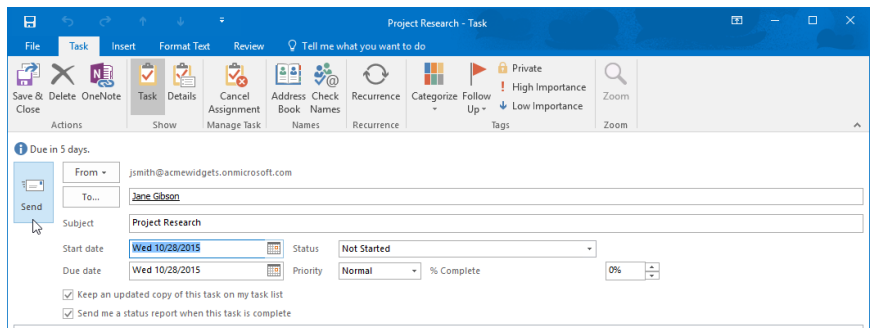
- Click the “Start date” date picker control and choose a date that is three business days from the current date:



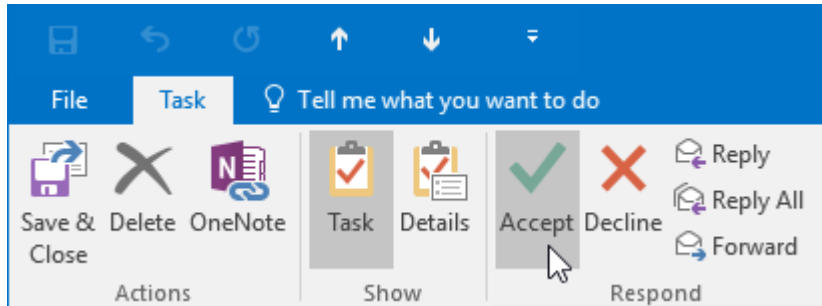
- Ensure that the “Due date” has the same date as the “Start date:”



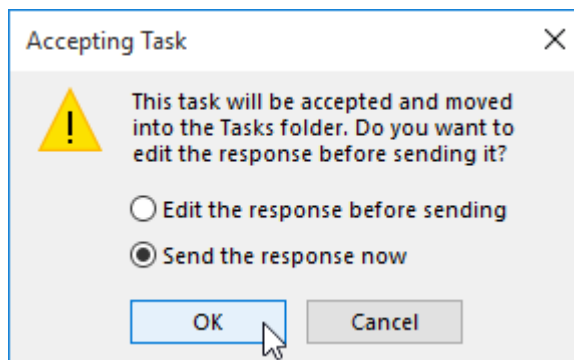
- Click Send:



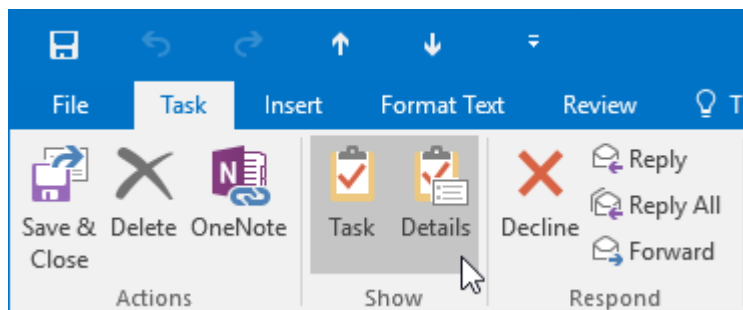
- The Task window will close and the task request will be sent to your recipient. If you have received a task from your partner, open that message and click Task → Accept:



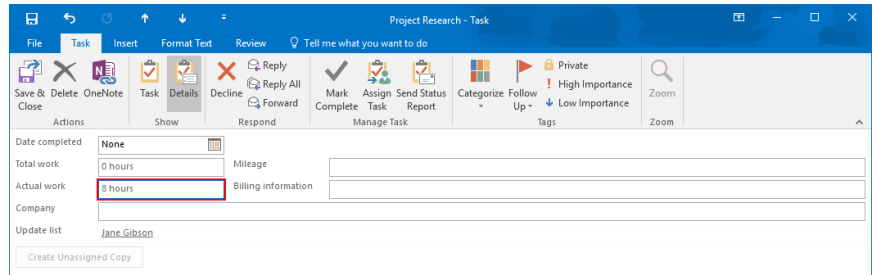
- If you see the Accepting Task dialog box displayed, ensure that the “Send the response now” radio button is selected and click OK:



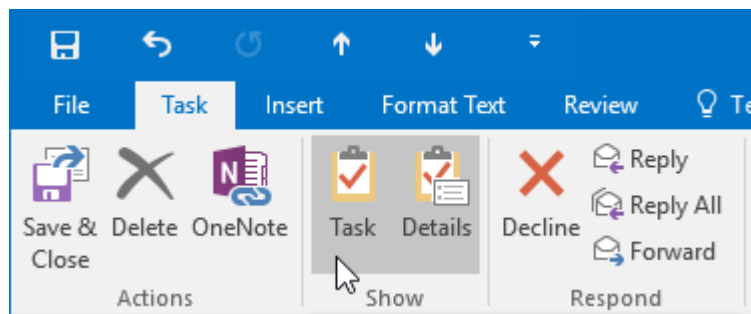
- Reopen the task that you accepted from inside the Task workspace. In the Task window, click Task → Details to display the Details portion:



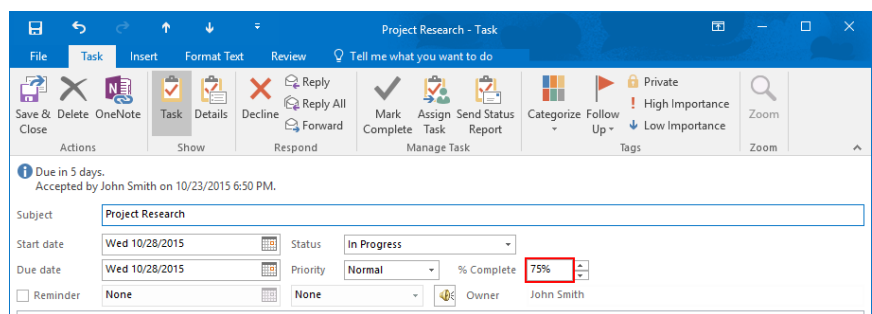
- Review the fields that are available in the Details section. Type “8 hours” into the “Actual work” text box:



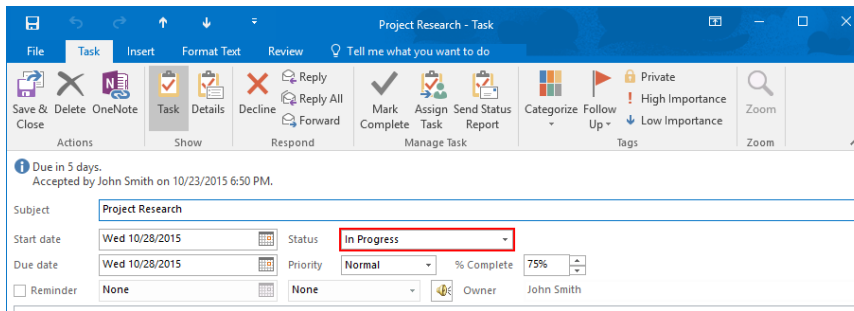
- Return to the regular task view by clicking Task → Task:



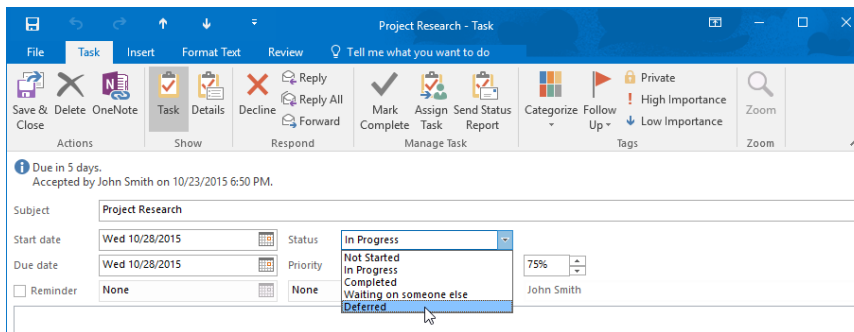
- Back at the regular task section, change the % Complete field to 75%:



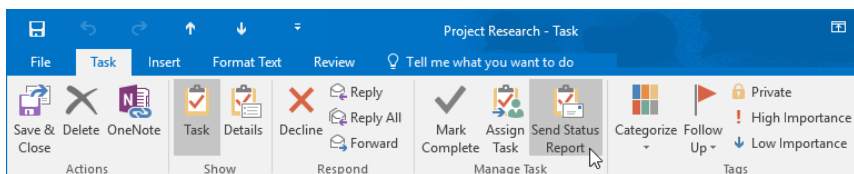
15. Examine the Status field. You will see that it has automatically been updated to "In Progress."



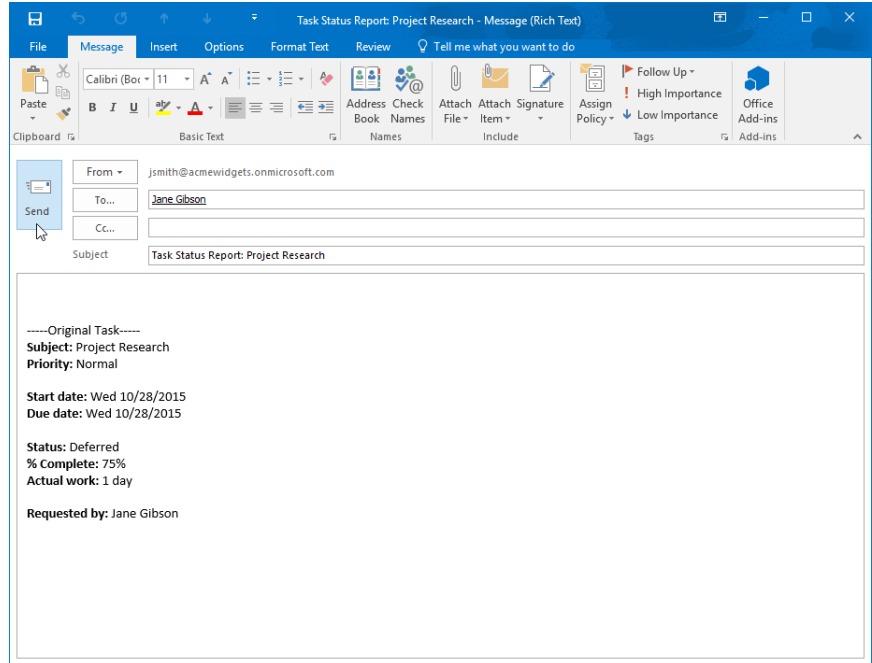
16. Change the Status drop-down menu to Deferred:



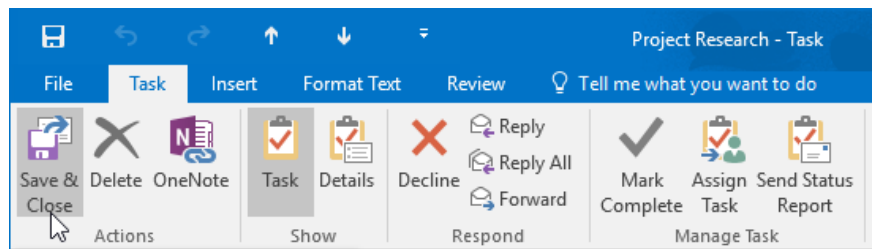
17. Now you need to send a status report back to your partner who assigned you this task. Do this by clicking Task → Send Status Report:



18. A Message window will open and display task information in the body of the message. Ensure that the To field has been filled in with your partner's e-mail address. Click Send:



19. Returning to the Task window, click Task → Save & Close:



20. Close Microsoft Outlook 2016 to complete this exercise.

Summary

During this lesson you learned about many of the advanced tools and methods that you can use to manage your calendar. At this point you should now be comfortable with modifying the calendar display, time zone, and other options. You should also be able to manage and create multiple calendars and calendar groups to facilitate planning and better organization. Finally, you should now know how to manage meeting responses in a proactive manner, as well as create and delegate tasks.

REVIEW QUESTIONS

1. How do you open the Outlook Options dialog box?
2. Where can you toggle the weather information that appears on your calendar?
3. What is the command sequence to create a new calendar group?
4. How do you view a list of meeting attendees and their attendance statuses?
5. How do you view and/or add more details to a task?

LESSON 4: ADVANCED CONTACT MANAGEMENT

Lesson Objectives

In this lesson you will learn how to:

- Edit an electronic business card
- Manage advanced contact options
- Forward contacts
- Export contacts

TOPIC A: Edit an Electronic Business Card

Electronic business cards have the same purpose as physical ones and they include much of the same information. Outlook includes the ability to receive, send, create, manage, and edit electronic business cards to help populate your contacts list and keep it organized. Over the course of this topic, you will learn all about electronic business cards and how you can edit them in Outlook 2016.

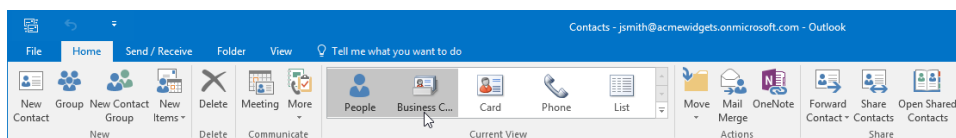
Topic Objectives

In this topic, you will learn:

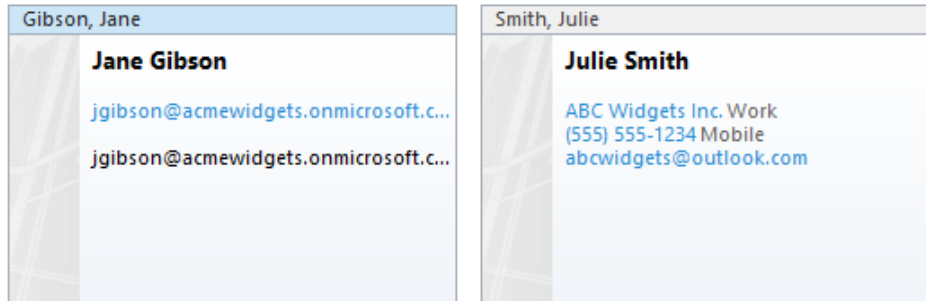
- About the default electronic business card
- About the Edit Business Card dialog box

DEFAULT ELECTRONIC BUSINESS CARDS

Whenever you add a new contact to Outlook 2016, it will automatically create an electronic business card for that person. Each new electronic business card will use the same default template that includes many of the pieces of information that you have added with the contact. To view your contacts as business cards, open the People workspace and click View → Business Card:



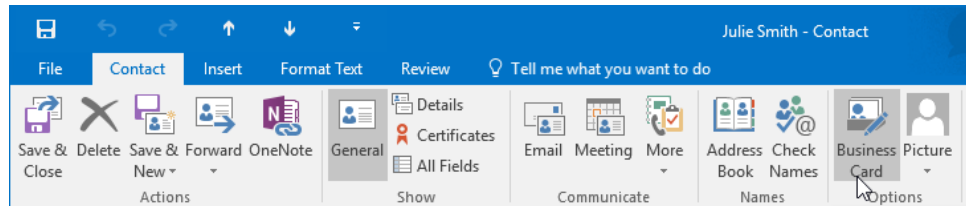
When contacts are displayed as business cards, you will see that each business card includes the contact name, phone number, e-mail address, company, job title, and much more:



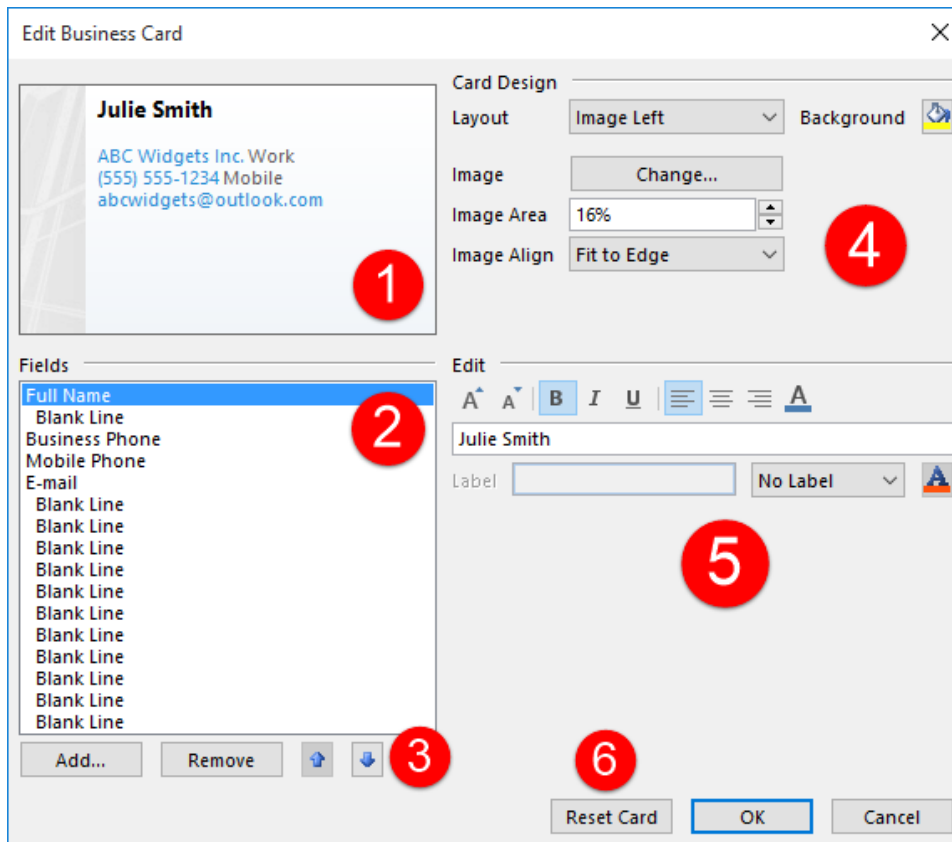
While the default electronic business card layout does a decent job at providing you with some of the most important information about a contact, you do have the option to edit it to your own liking.

THE EDIT BUSINESS CARD DIALOG BOX

In order to edit the layout of an electronic business card, you first need to open the Edit Business Card dialog box. To open this dialog box, first open the contact that you would like to work with and then click Contact → Business Card:



The Edit Business Card dialog box will open:



The **preview area (1)** at the top of the dialog box will give you an idea of how the current business card looks using the current settings. The **Fields section (2)** lists all of the fields that can be displayed on the business card. Additionally, this section also provides you with **controls to manage those fields (3)** by adding, removing, and rearranging them as needed.

On the right-hand side of the dialog box, the **Card Design section (4)** includes controls that are used to change the layout of the business card, as well as customize the background color and even add an image. Below this section, the **Edit section (5)** is used to customize how the font for various fields appears in the business card. For example, you are able to apply various text effects, alignment, and color options.

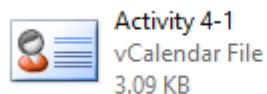
Clicking the **Reset Card button (6)** will reset all of the options in this dialog box back to their default settings. Or, click OK to apply your changes and close this dialog box.

ACTIVITY 4-1

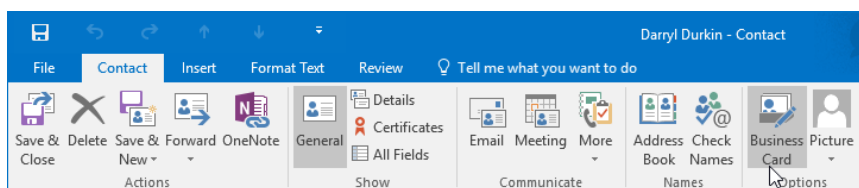
Editing an Electronic Business Card

You have created a contact for a new employee that has just joined your team. You would like to customize his electronic business card to show only his name, company, work e-mail, and work phone number.

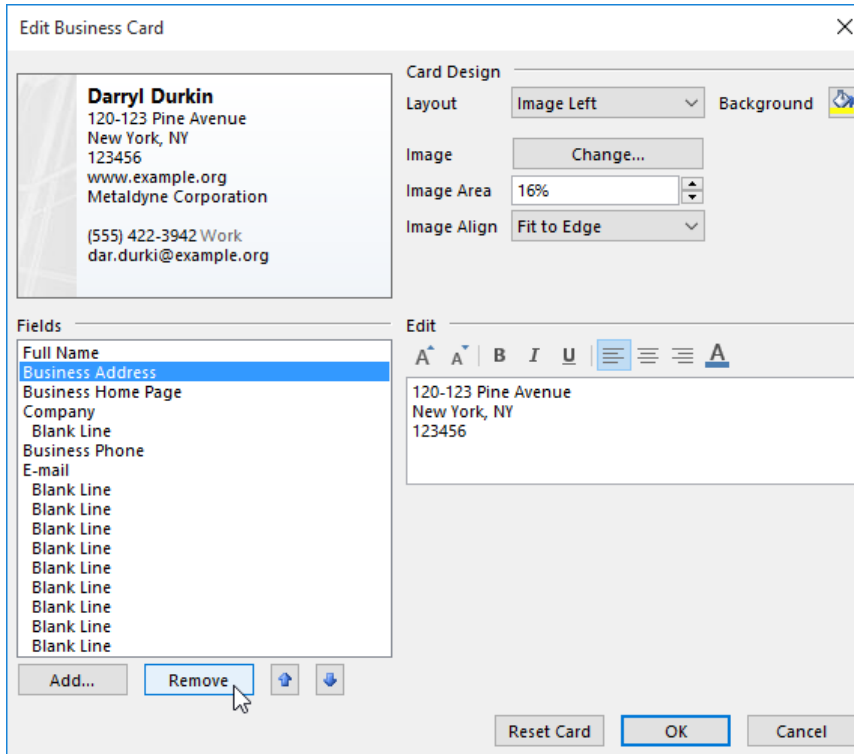
1. To begin, open Outlook 2016. Then, double-click the Activity 4-1.vcf file within your Exercise Files folder:



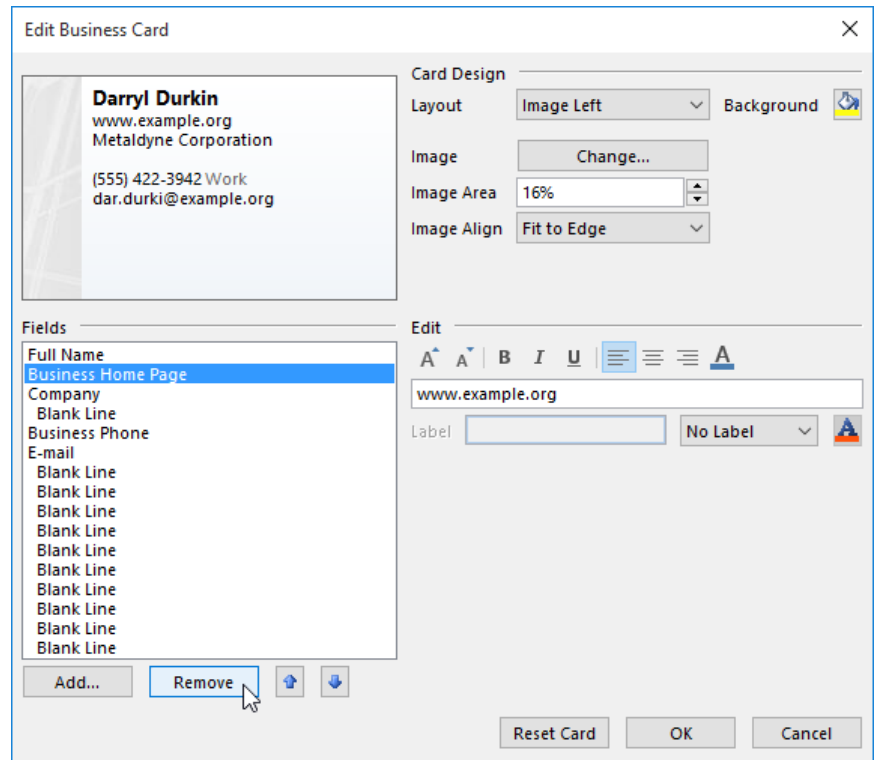
2. With the contact for Darryl Durkin now open, you will be able to see what his electronic business card looks like. To start editing it, click Contact → Business Card:



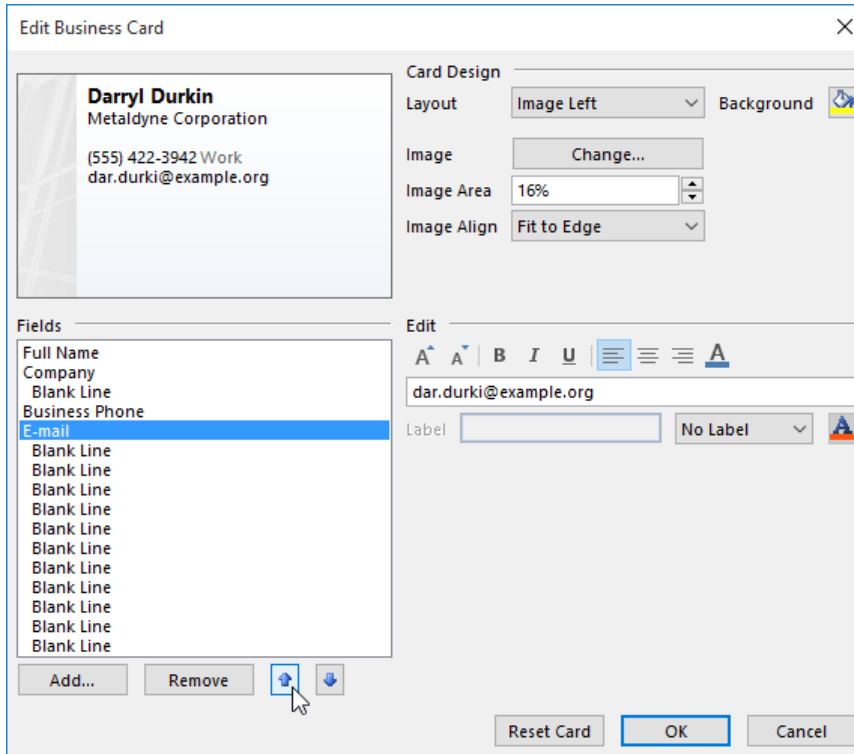
3. The Edit Business Card dialog box will now be displayed. Inside the Fields section, click to select the Business Address field and then click Remove:



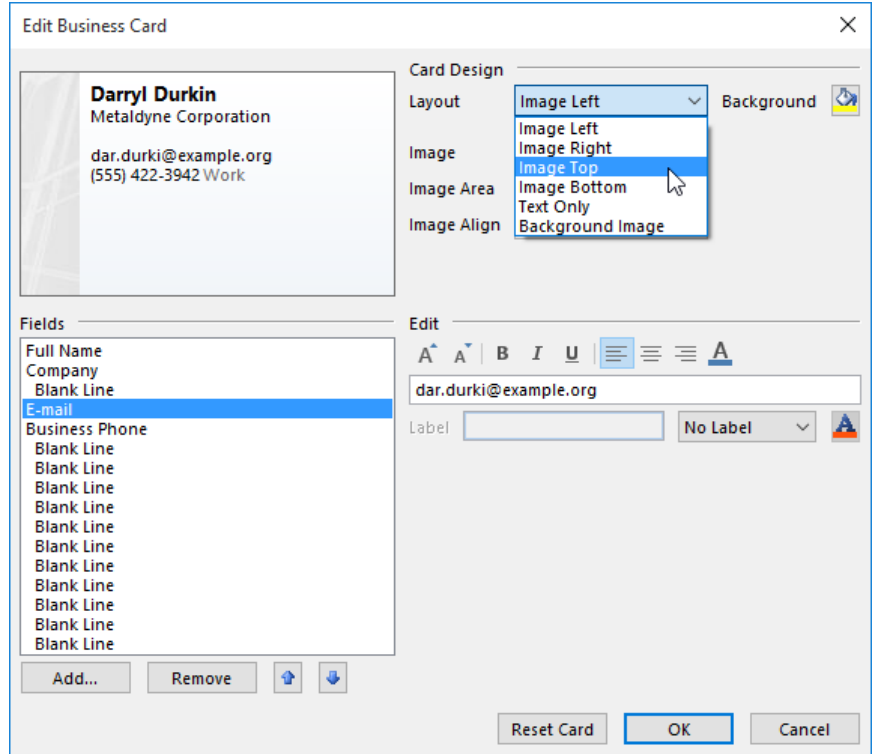
4. In the same section, ensure that the Business Home Page field is selected and click Remove:



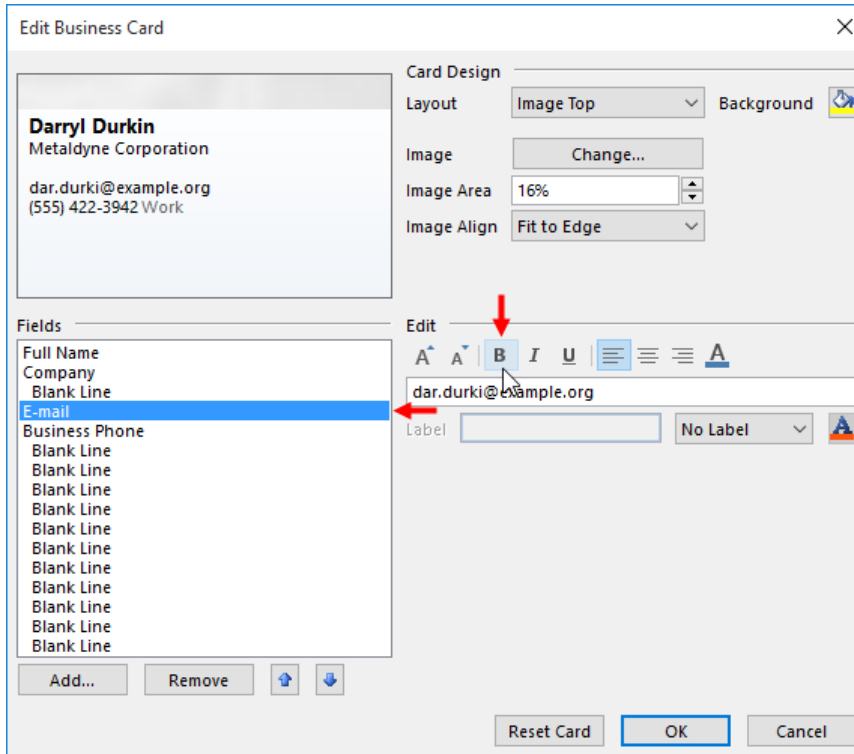
5. You would like the e-mail address to appear above the business phone number. Still in the Fields section, click to select the E-mail field and then click the Move Field Up button:



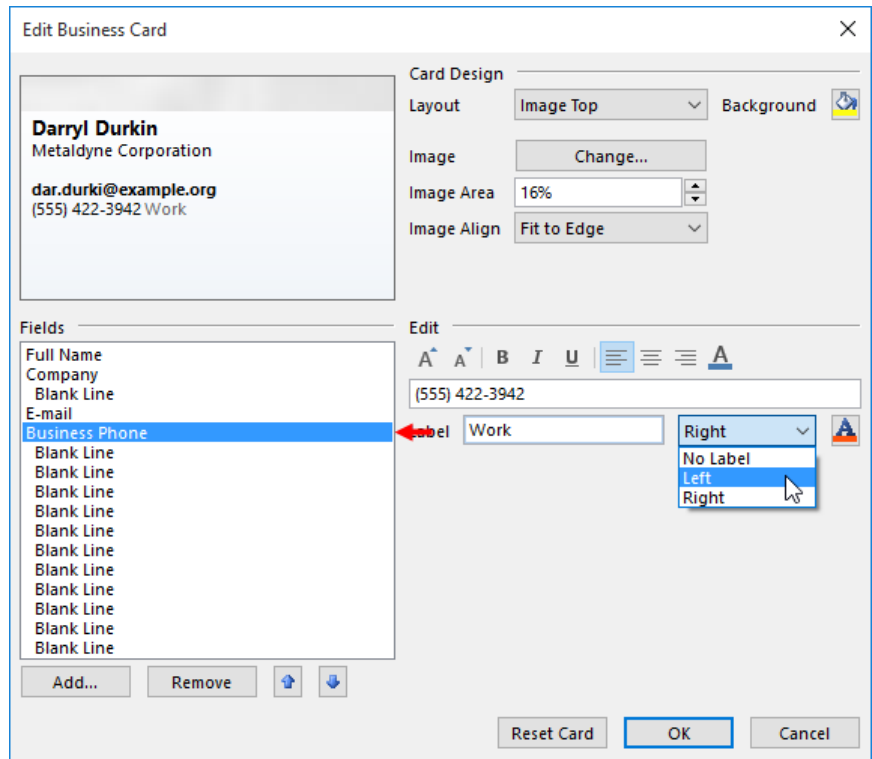
- The E-mail field will now appear above the Business Phone field. Next, let's modify the layout by clicking the Layout drop-down command and choosing the Image Top option:



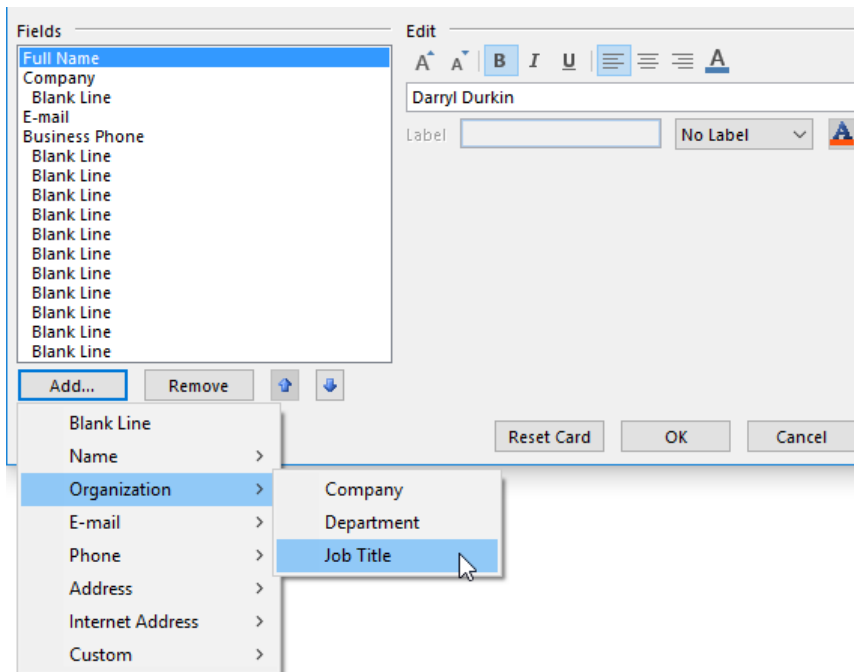
7. With the layout now tweaked, you would like to edit how some of the text is displayed. Inside the Fields section, click to select the E-mail field. Then, inside the Edit section, click Bold:



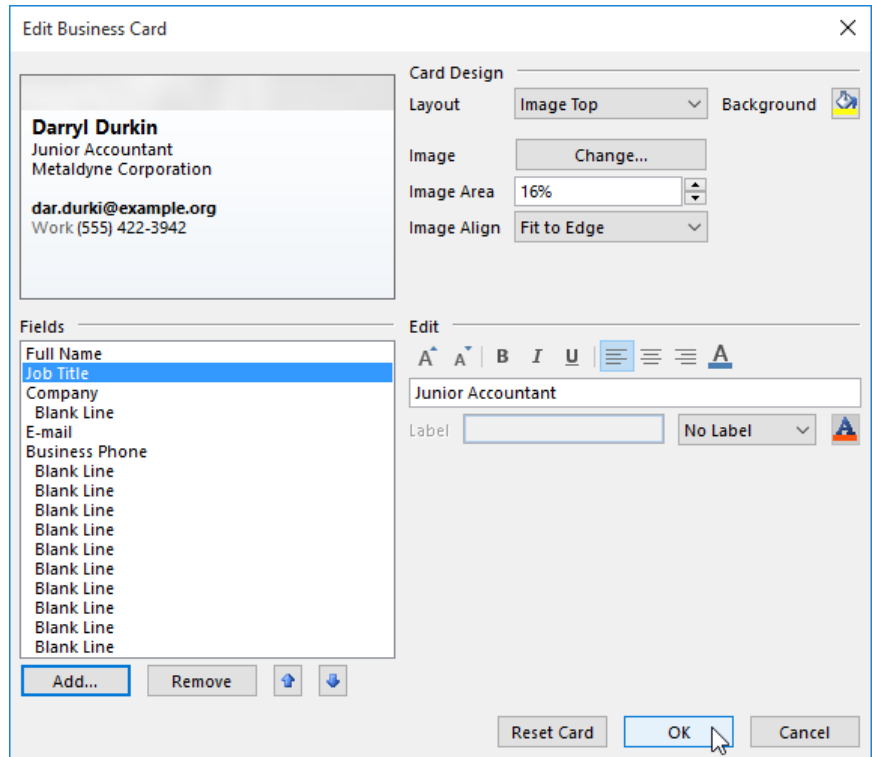
- Next, you would like to move the label for the Business Phone field (Work) from the right side of the field to the left. Inside the Fields section, click to select the Business Phone field. Next, inside the Edit section, click the Label drop-down menu and choose Left:



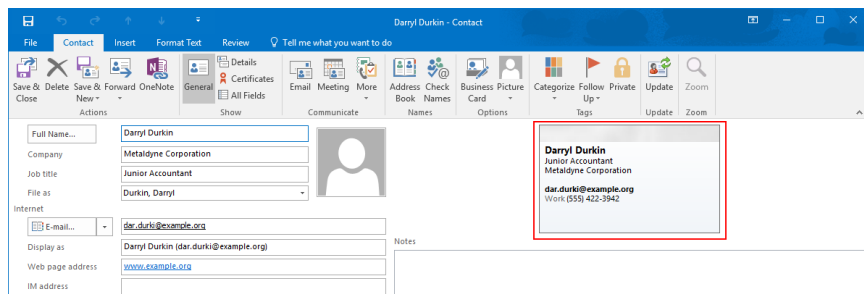
9. On second thought, you think you should include Darryl's job title. Inside the Fields section, click to select the Full Name field. Next, click Add → Organization → Job Title:



10. Click OK to apply the new settings:



11. Back at the Contact window, examine the preview for the business card. You will see that it has changed to incorporate the edits you made:



12. Save the contact to your desktop and close Microsoft Outlook 2016 to complete this exercise.

TOPIC B: Manage Advanced Contact Options

To help configure and maintain your contacts, Outlook has provided you with a variety of advanced contact options. These options include changing how contacts are displayed in the People workspace, as well as how the information in these contacts is used throughout Outlook. Over the course of this topic, you will learn all about managing advanced contact options. You will also learn how to create and manage contact groups.

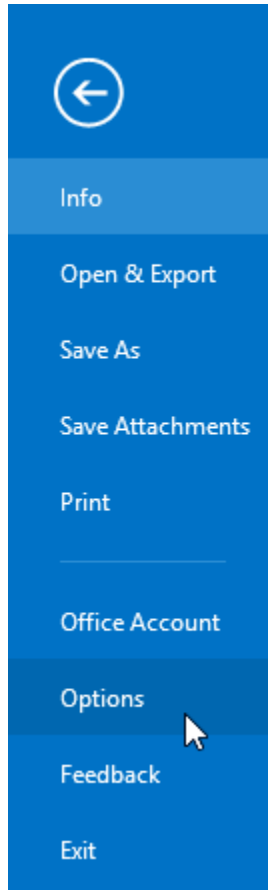
Topic Objectives

In this topic, you will learn:

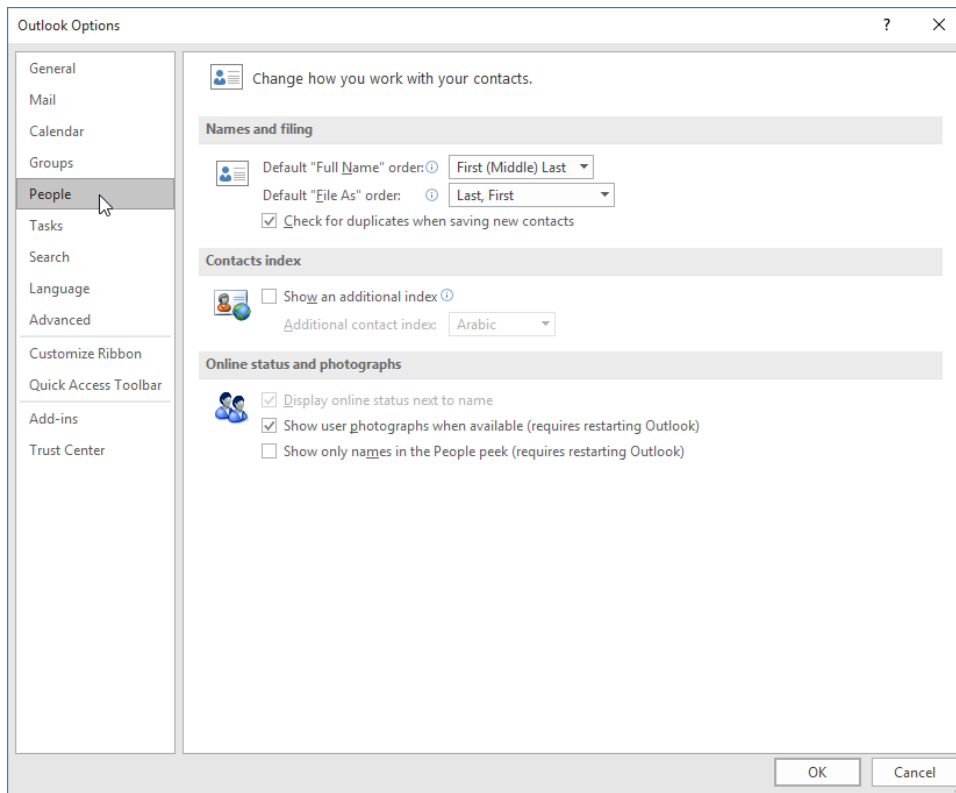
- About People workspace options
- About contact groups
- How to manage contact group membership
- How to show notes about a contact group
- How to send a message to a contact group
- How to forward a contact group
- How to delete a contact group

PEOPLE OPTIONS

Most of Outlook's advanced contact options are managed in the Outlook Options dialog box. To open this dialog box, click File → Options:



Next, click the People category:



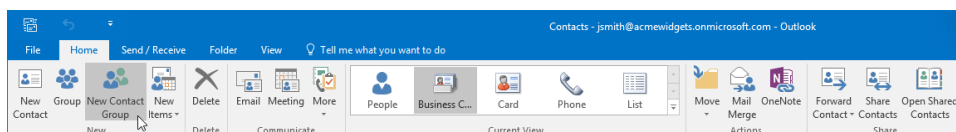
The options here are fairly straightforward. From top to bottom, you can:

- Change how names are filed
- Show an extra index
- Toggle user photographs and toggle names in the People peek feature

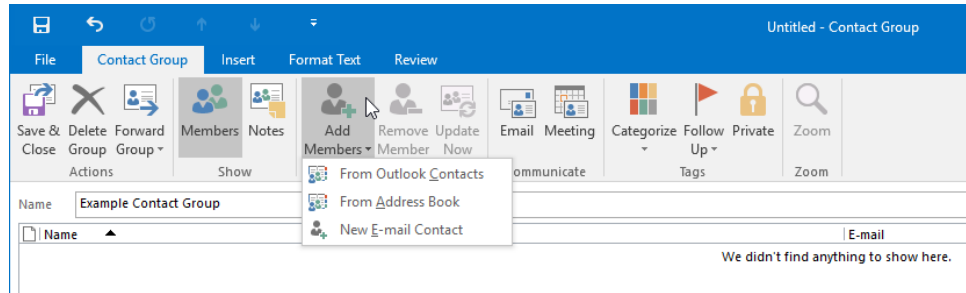
CONTACT GROUPS

A **contact group**, formerly known as a **distribution list**, allows you to create a single contact that represents multiple people. This makes sending group e-mails easy and efficient.

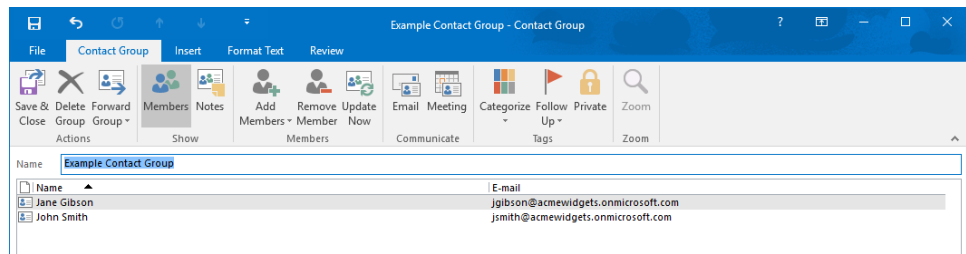
To create a new contact group, open the People workspace and click Home → New Contact Group:



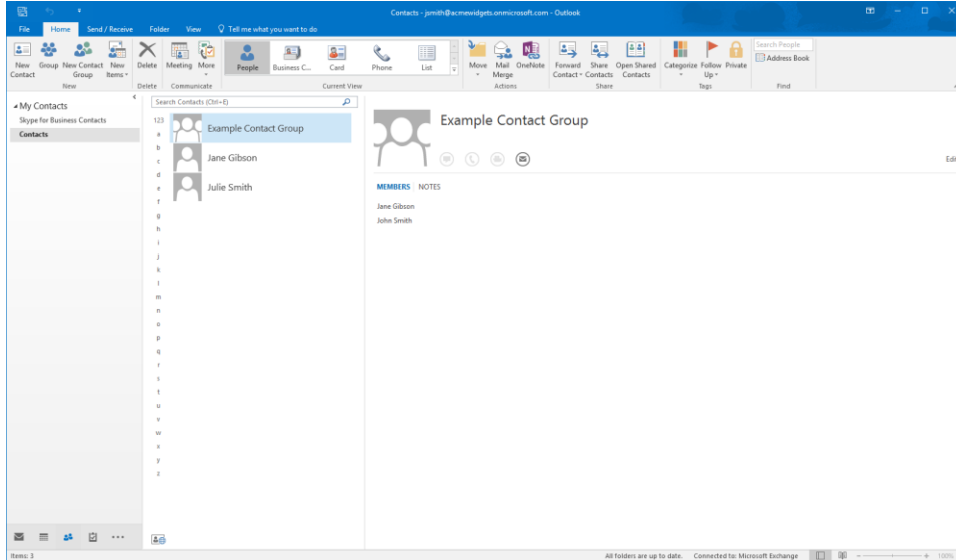
This action will display the Contact Group window. Here, you will be given the opportunity to assign a name to this new group by typing into the Name text box. By clicking Contact Group → Add Members, you can add members to this contact group from your Outlook contacts or the Address Book. You can also create new contacts from scratch by clicking New E-mail Contact:



Any members of a contact group will be listed in the main area of the Contact Group window. In this example, you can see that this group includes Jane Gibson and John Smith:

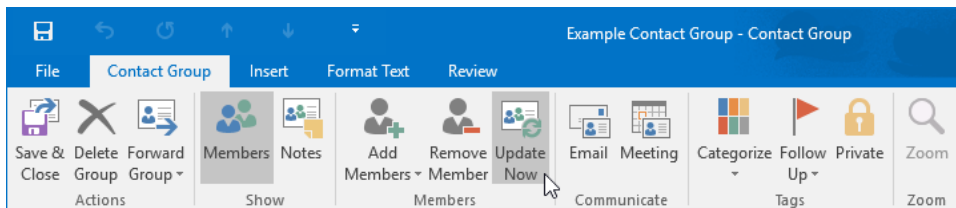


Clicking Contact Group → Save & Close will save the new contact group and return you to the People workspace. There, you will see the new contact group listed. You will see that the default profile photo for a contact group helps in differentiating it from regular contacts:



The Update Now Command

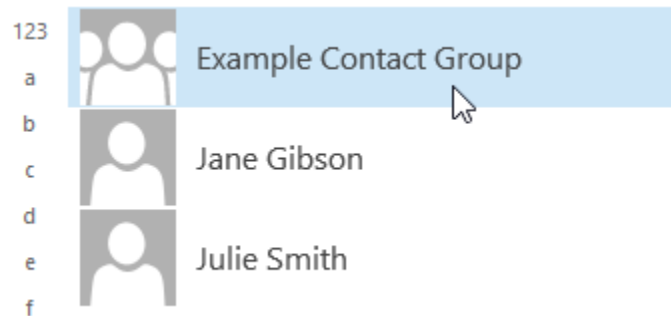
To keep the information of any group members added to the group from your Address Book up to date, click Contact Group → Update Now:



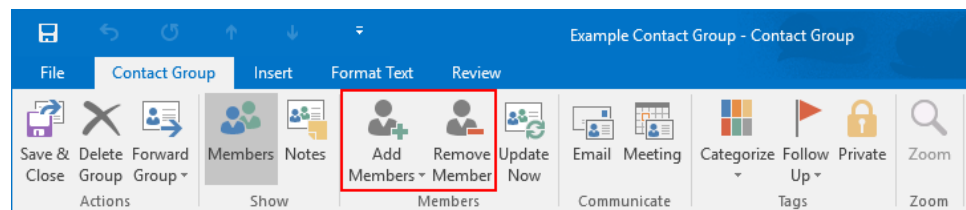
This action will immediately sync the details of the distribution list members with the information stored about them in the Address Book.

MANAGE CONTACT GROUP MEMBERSHIP

Once a contact group has been created, you can manage it at any point. To open a contact group in the Contact Group window, double-click its listing in the People workspace:



To manage the members of this group, use the commands in the Members group on the Contact Group tab:



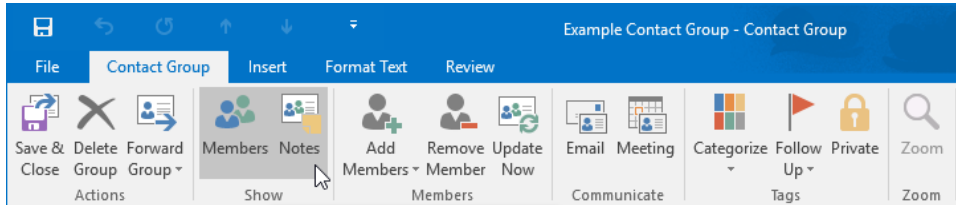
Here is an overview of these commands:

- New members can be added to this group from either the Address Book, your contacts, or from scratch using the **Add Members** drop-down command.
- The **Remove Member** command will remove the selected contact from the current contact group.

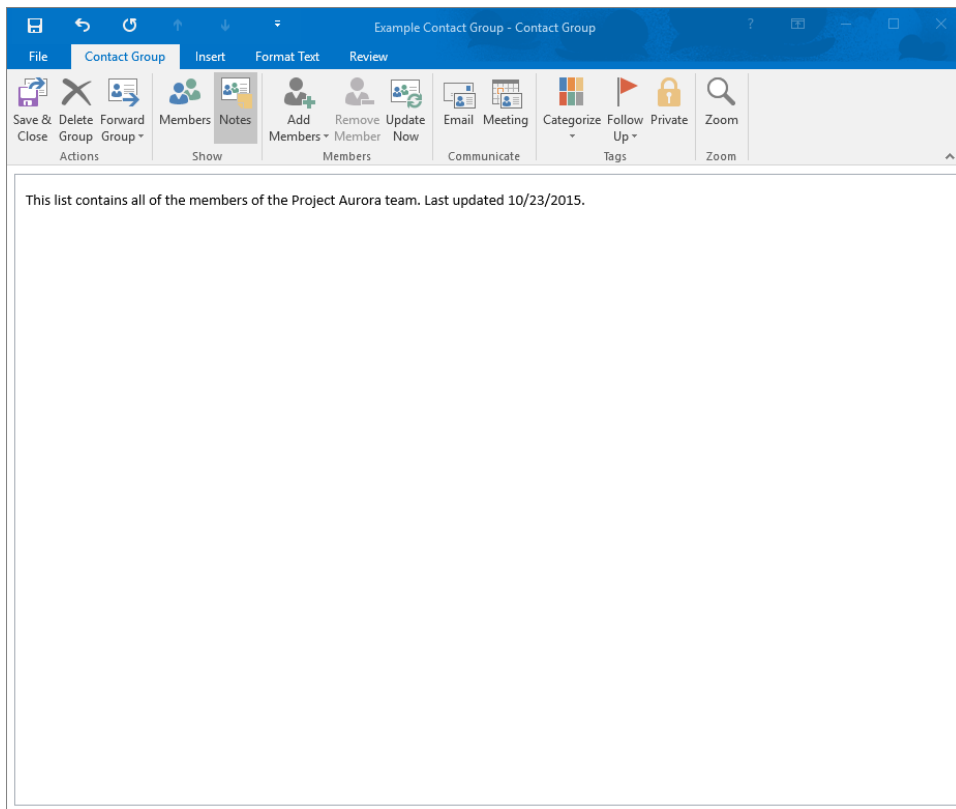
After making your changes, click Contact Group → Save & Close.

SHOW NOTES ABOUT A CONTACT GROUP

You can add helpful information about a contact group using the Notes feature. With the Contact Group window open for the contact group that you are working with, click Contact Group → Notes:



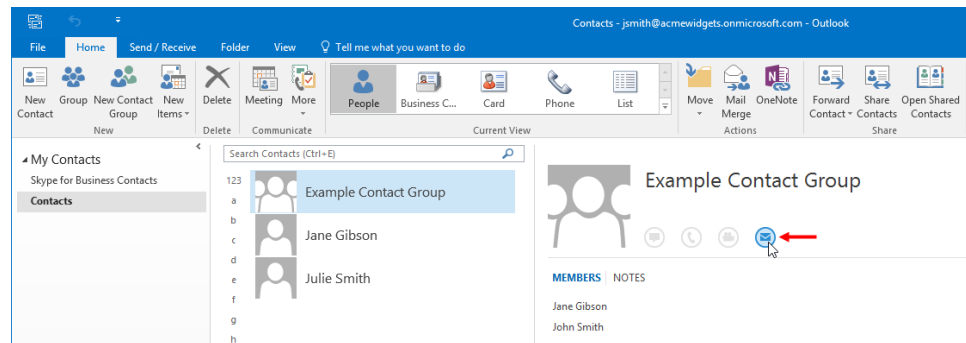
The body of the Contact Group window will change to incorporate a large text area. In this area you can type any notes that relate to the current contact group, such as its purpose and when it was last updated:



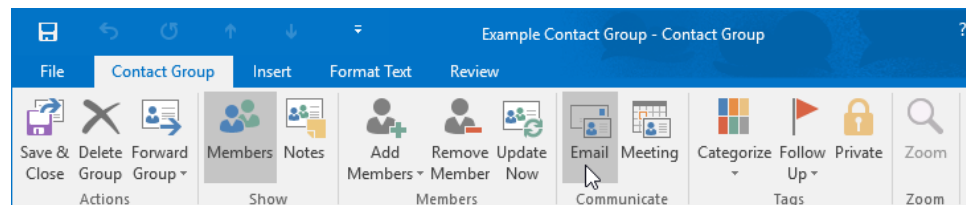
After viewing or making any changes to the Notes section, you can return to the members list by clicking Contact Group → Members.

SEND A MESSAGE TO A CONTACT GROUP

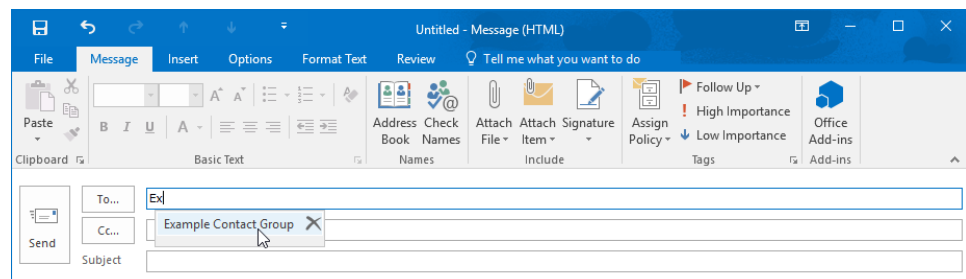
The primary purpose of a contact group is to send a message to a group of people in a more efficient manner. You can do this in few different ways. The first is to select the contact group from inside the People workspace and then click the “Send e-mail message” icon in the reading pane:



If you open a contact group in the Contact Group window, you can send a message to that group by clicking Contact Group → Email:

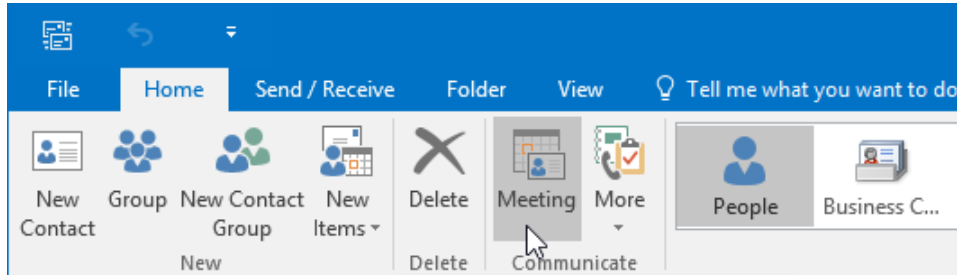


Either of these actions will open an e-mail message addressed to the contact group. You can also create a new e-mail message from scratch, type the name of the contact group into the To field, and click its listing when it is suggested:

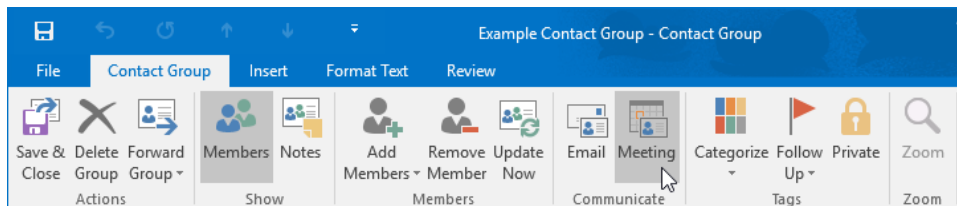


Send a Meeting to a Contact Group

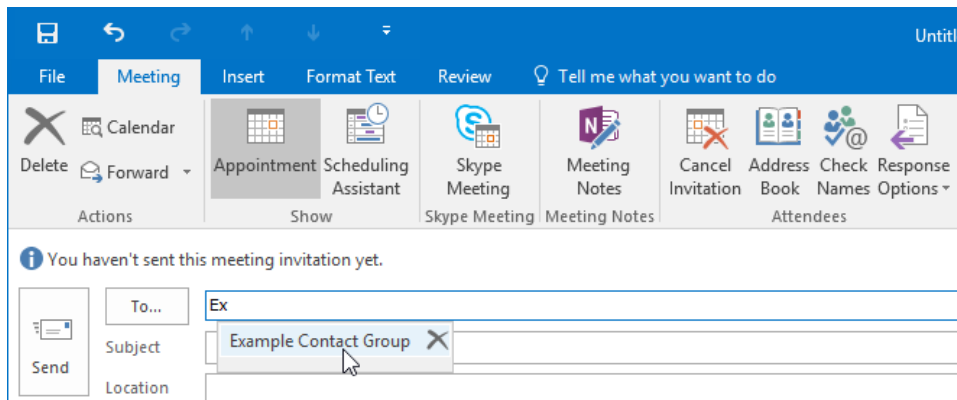
You are also able to send a meeting request to a contact group in similar ways. First, you can select the contact group from the People workspace and click Home → Meeting:



If you open a contact group in the Contact Group window, you can send a meeting request to that group by clicking Contact Group → Meeting:



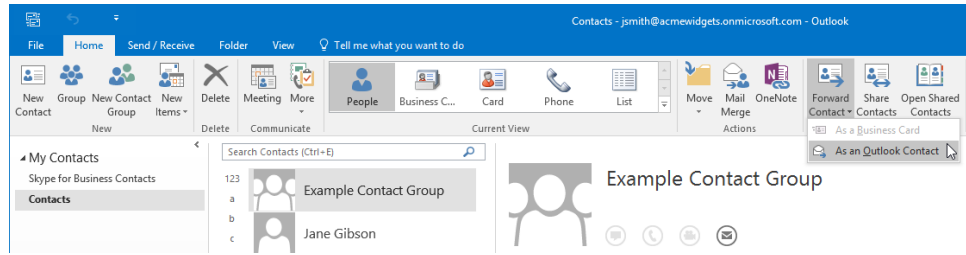
Either of these actions will open a meeting request addressed to the contact group. You can also create a new meeting request from scratch, type the name of the contact group into the To field, and click its listing when it is suggested:



FORWARD A CONTACT GROUP

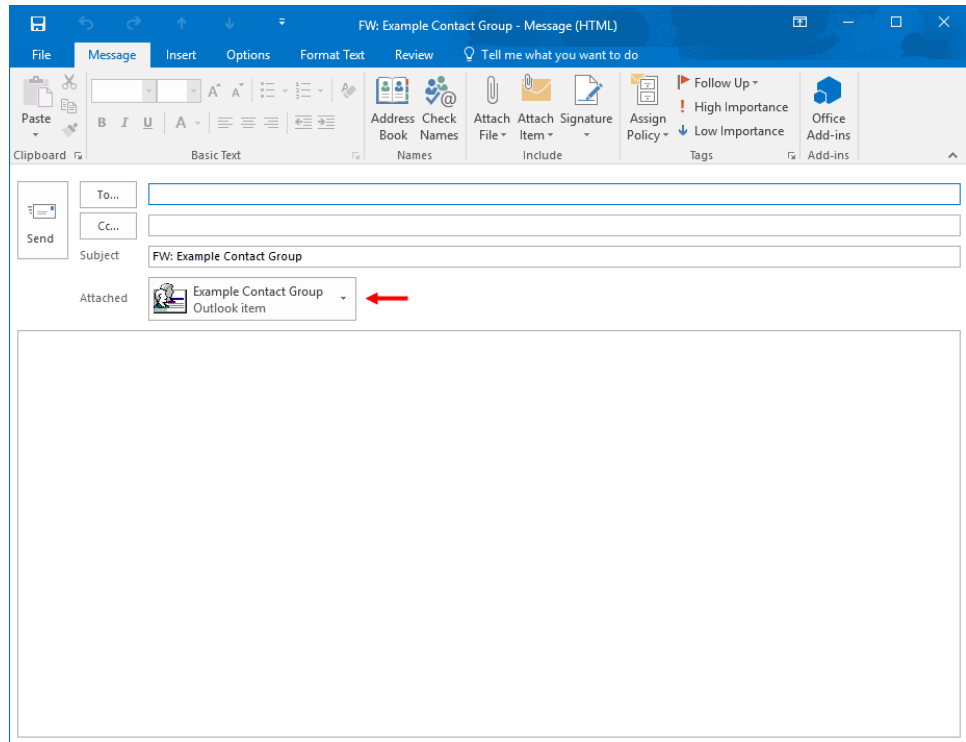
If someone else needs the contact group information, you can forward the contact card to them. To do this, first click to select the contact group

in question from inside the People workspace. Then, click Home → Forward Contact → As an Outlook Contact:



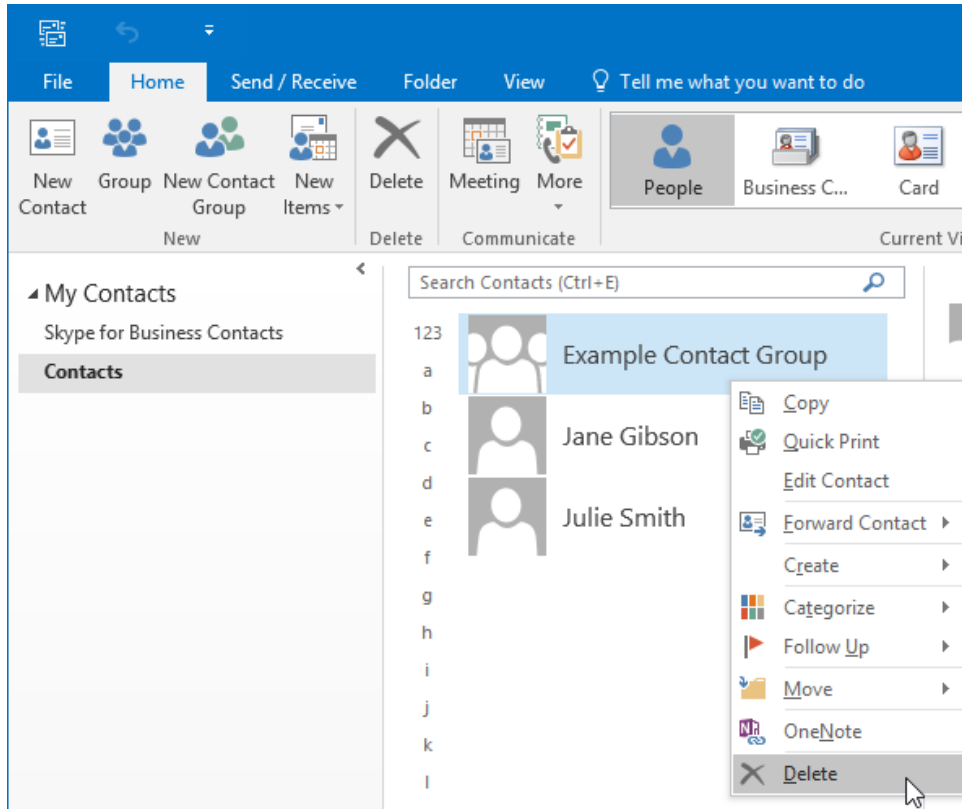
(Alternatively, you can forward a contact group that is open in the Contact Group window by clicking Contact Group → Forward Contact → As an Outlook Contact.)

A new Message window will open with the selected contact group as an attachment. From there you can send the message to anyone that you would like, even the to the contact group itself:

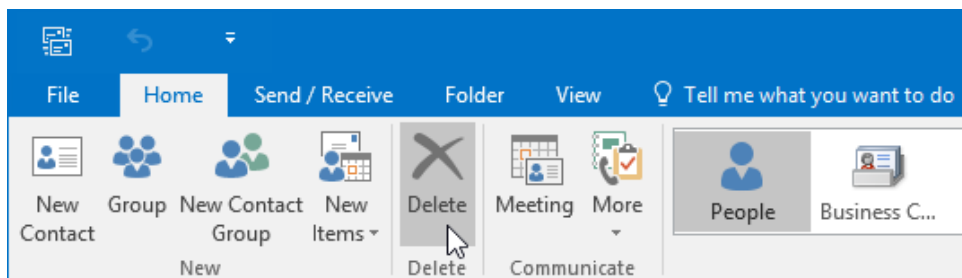


DELETE A CONTACT GROUP

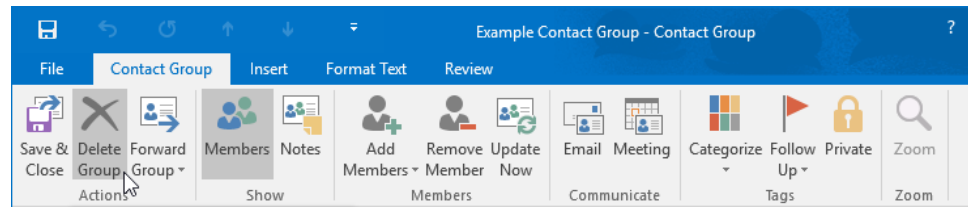
To delete a contact group that you do not use anymore, right-click on the listing for that group in the People workspace and click Delete:



Alternatively, you can click to select the group and then click Home → Delete:



Or, open the contact group in the Contact Group window and click Contact Group → Delete Group:

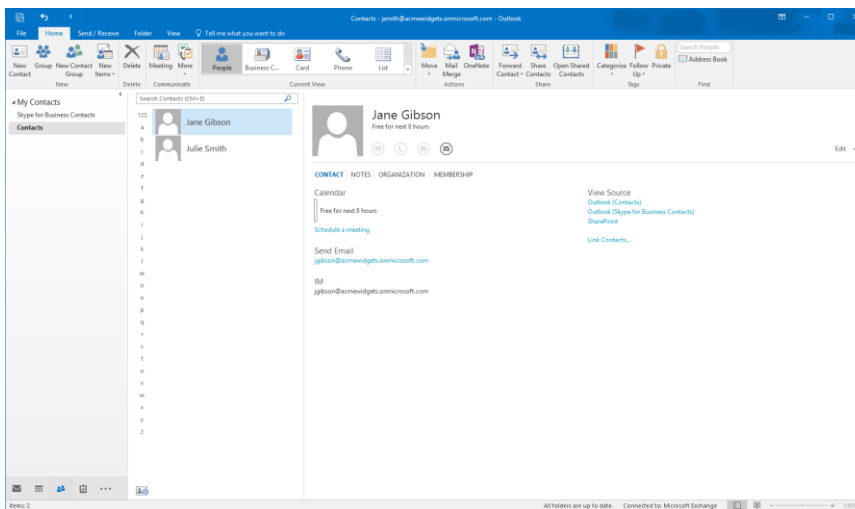


ACTIVITY 4-2

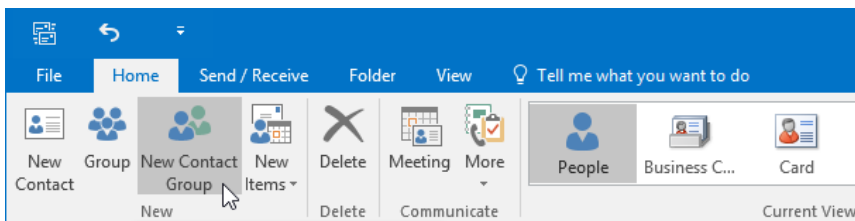
Managing Advanced Contacts Options

You have been put in charge of a team that is going to be developing a new product for your organization. As you are going to need to communicate with your team on a daily basis, you would like to create a contact group for them.

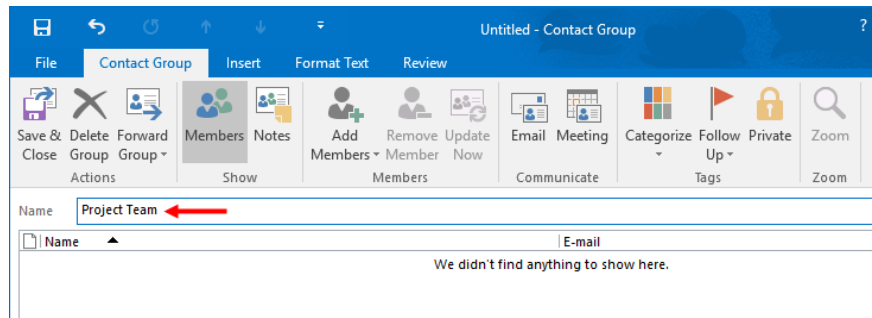
1. To begin, open Outlook 2016 and ensure that the People workspace is displayed:



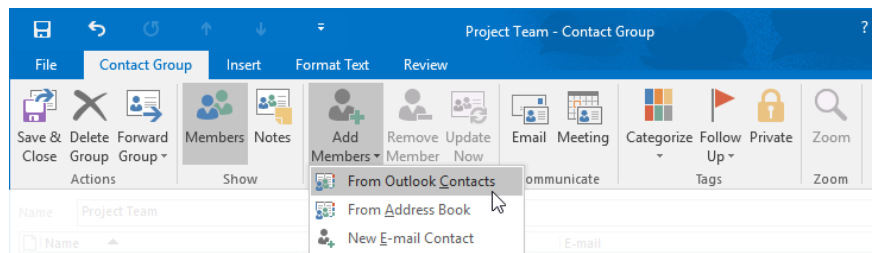
2. Start creating a new contact group by clicking Home → New Contact Group:



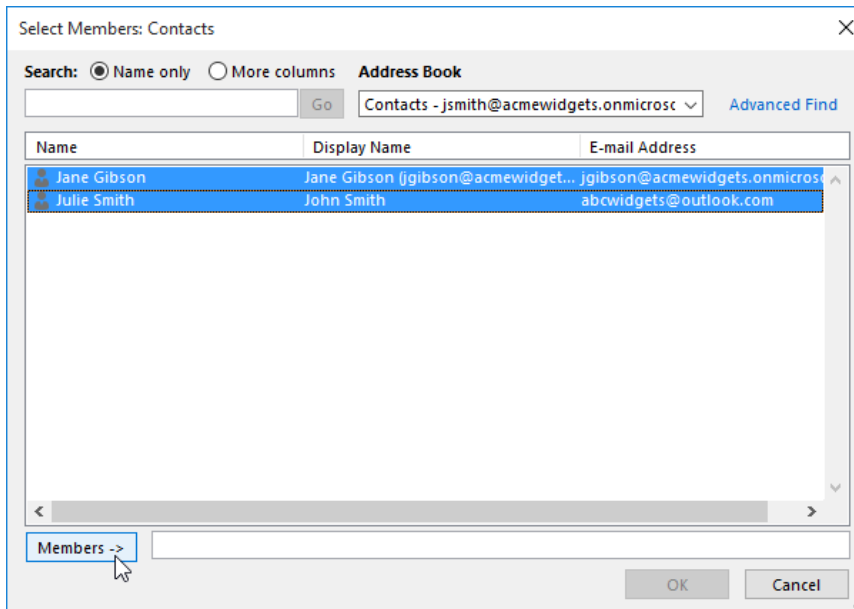
3. The Contact Group window will now be displayed. Inside the Name text box, type "Project Team:"



4. Start adding members to this new contact group by clicking Contact Group → Add Members → From Outlook Contacts:

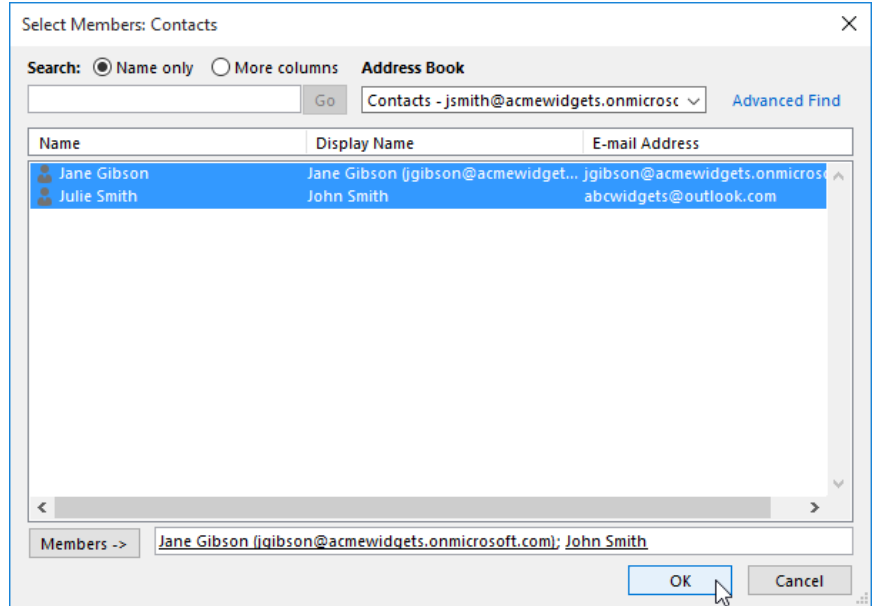


5. The Select Members dialog box will now be displayed. While holding down the Ctrl key on your keyboard, click on any two contacts that are listed to select them. Next, click the Members button in the lower left-hand corner:

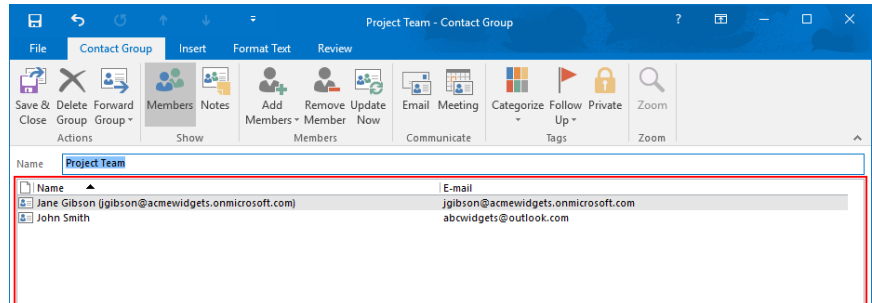


(If you do not have any existing contacts, right-click a blank area of this dialog box and click New Entry to create a new contact.)

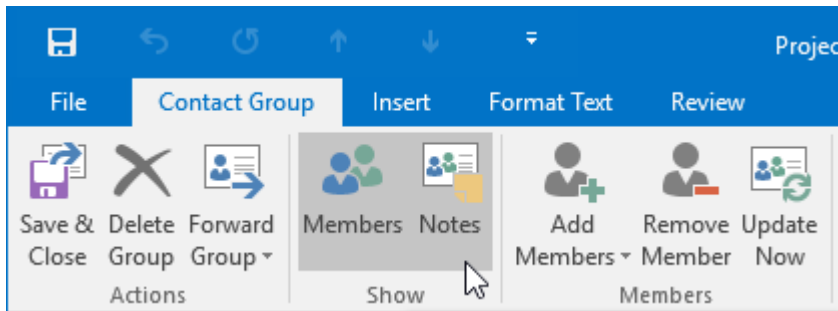
- The contacts that you selected will now be listed inside the text area in the lower portion of this dialog box. Click OK to apply the new settings:



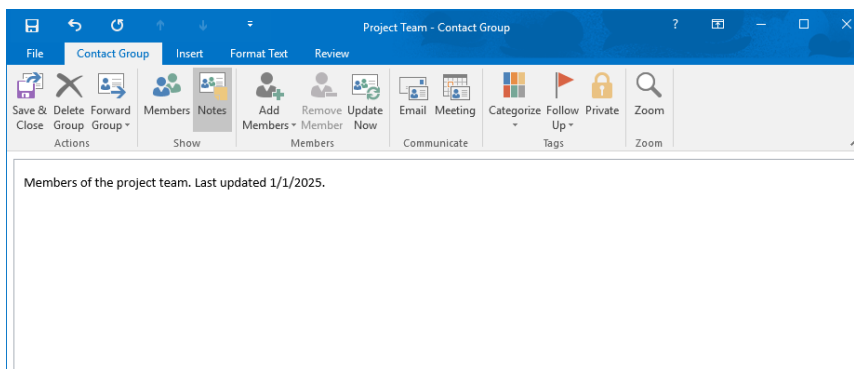
- The new members that you added to the group will now be listed inside the main body of the Contact Group window:



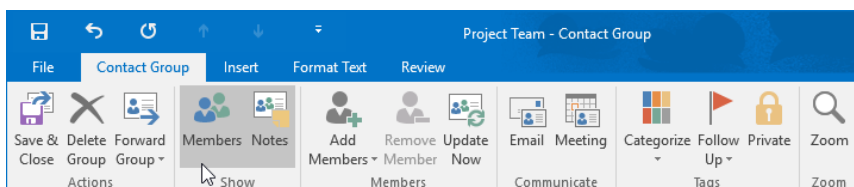
8. Show the notes for this contact group by clicking Contact Group → Notes:



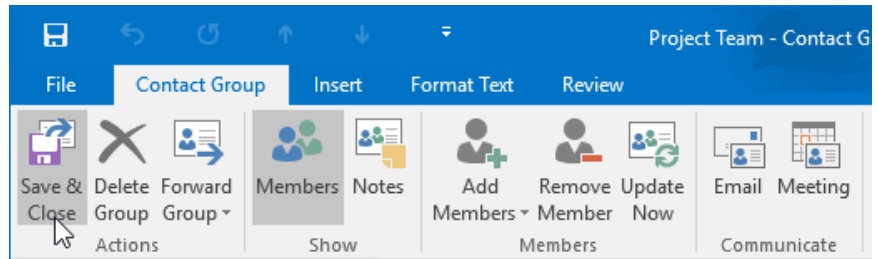
9. Into the provided text area, type “Members of the project team. Last updated 1/1/2025.”



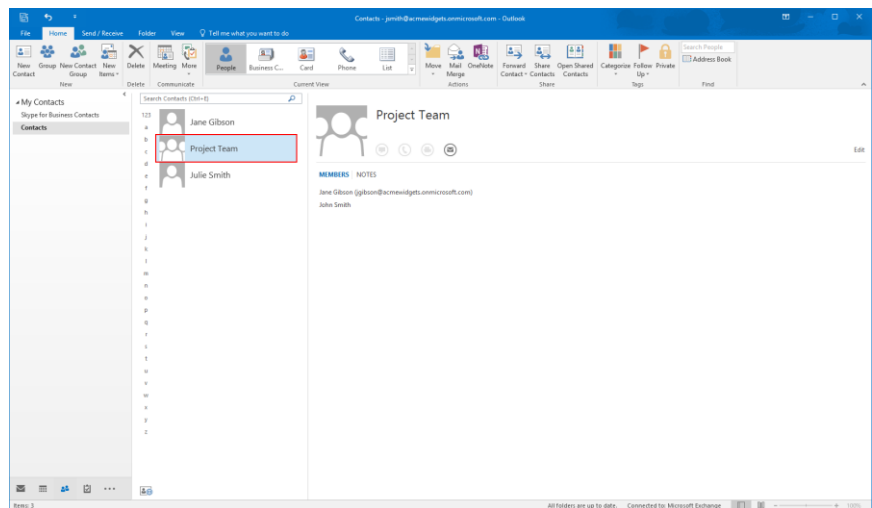
10. Return to the members list by clicking Contact Group → Members:



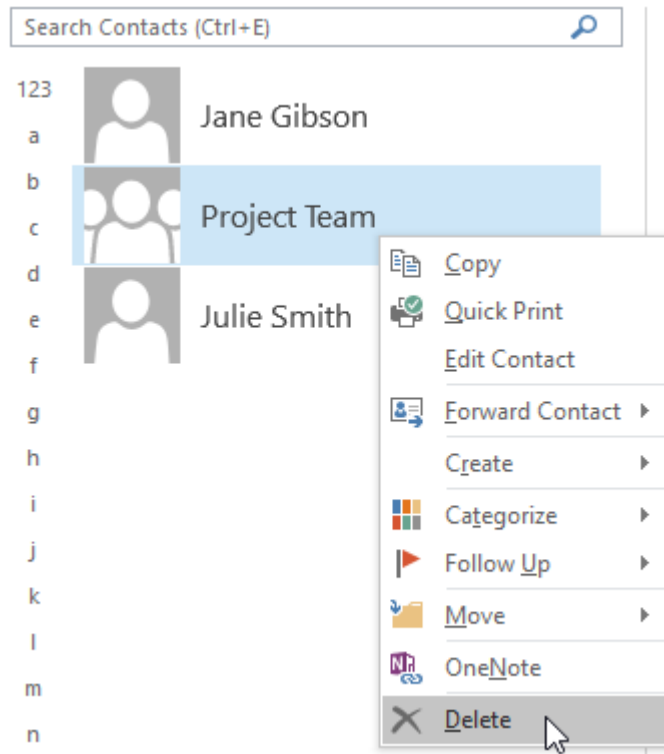
11. Save this group by clicking Contact Group → Save & Close:



12. Returning to the People workspace, you will see a listing for the new contact group that you just created:



- 13.** At the last minute, the project that the team had been assigned to was cancelled and its members have been reassigned. As you do not need this contact group anymore, right-click on its listing and click Delete:



- 14.** The contact group will immediately be deleted from the People workspace. Close Microsoft Outlook 2016 to complete this exercise.

TOPIC C: Forward Contacts

As you build up your contacts and update them to have the latest information, you may need to share them amongst your colleagues. Outlook 2016 has built-in functionality to forward your contacts to others inside and outside of your organization using a variety of different formats. Over the course of this topic, you will learn how to forward contacts using these different formats.

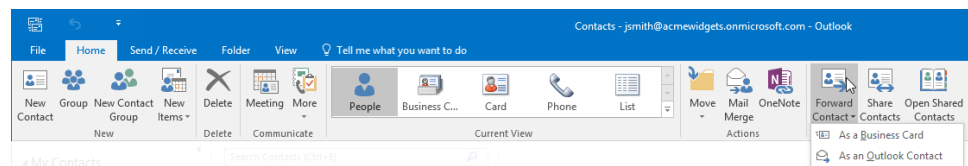
Topic Objectives

In this topic, you will learn:

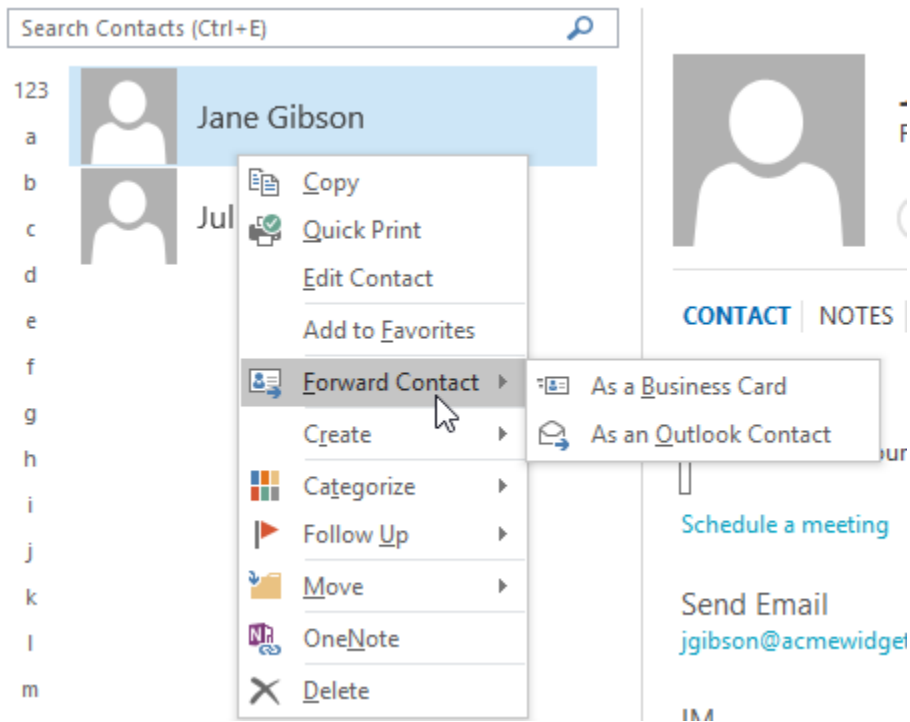
- About the formats that can be used to forward a contact

FORMATS TO FORWARD A CONTACT

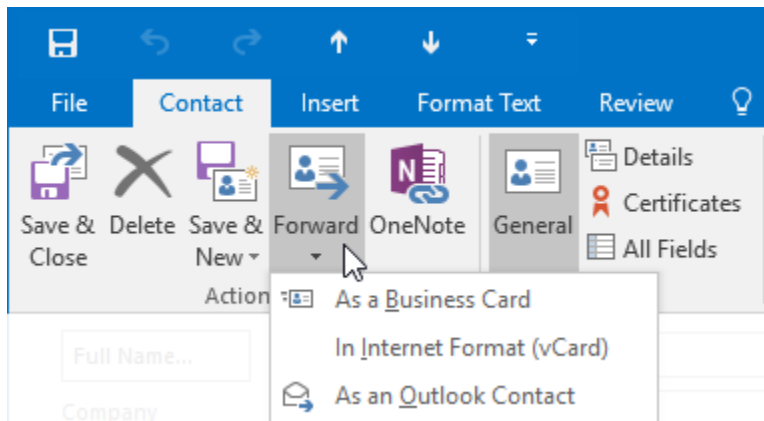
To forward a contact to another person that is inside or outside of your organization, there are a few different methods available to you. First, you can click to select the contact that you would like to forward from inside the People workspace and then click Home → Forward Contact → [Format]:



You can also right-click directly on a contact that is listed inside the People workspace and click Forward Contact → [Format]:



Finally, you can forward a contact that is open in the Contact window by clicking Contact → Forward → [Format]:



All of these methods will give you similar options. These include:

- **As a Business Card:** Will attach a .vcf file to a new message and insert the business card into the message itself. Once received by the recipient, it can be viewed and saved to their own contacts list no matter if they use Microsoft Outlook or not. The business card itself will also be shown in the body of the e-mail.
- **In Internet Format (vCard):** Will attach a .vcf file containing contact information to a new message. Once received by the recipient, it can be viewed and saved to their own contacts no matter if they use Microsoft Outlook or not.
- **As an Outlook Contact:** Will attach an .msg file containing contact information to a new message. Only recipients with Microsoft Outlook will be able to view and store contacts in this format.

Any format that you choose will open a new Message window with the contact attached in the format that you selected. From there, you can address this message to anyone that you wish.

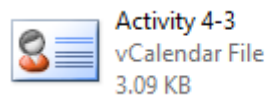
ACTIVITY 4-3

Forward Contacts

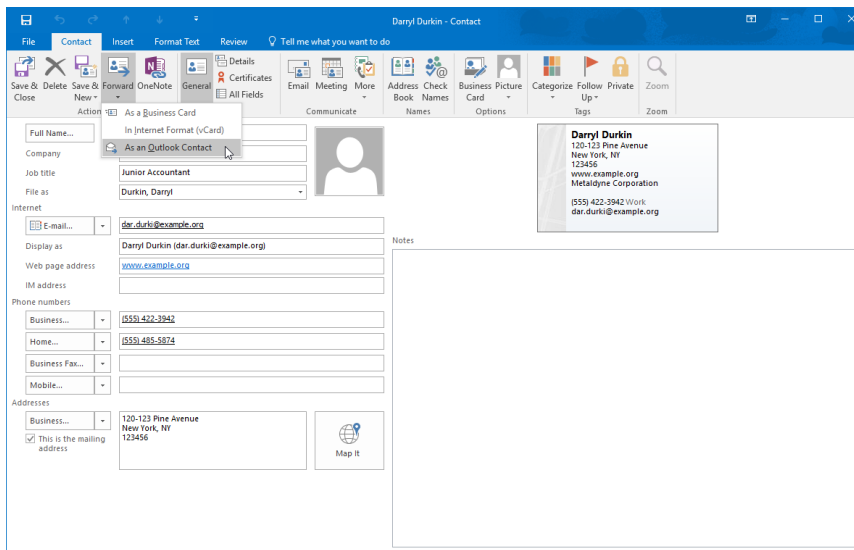
A colleague of yours is going to be taking over some of your duties and will become the point of contact for one of your clients. You need to forward the contact information for that client to your colleague.

Note that students should partner up in order to complete this exercise.

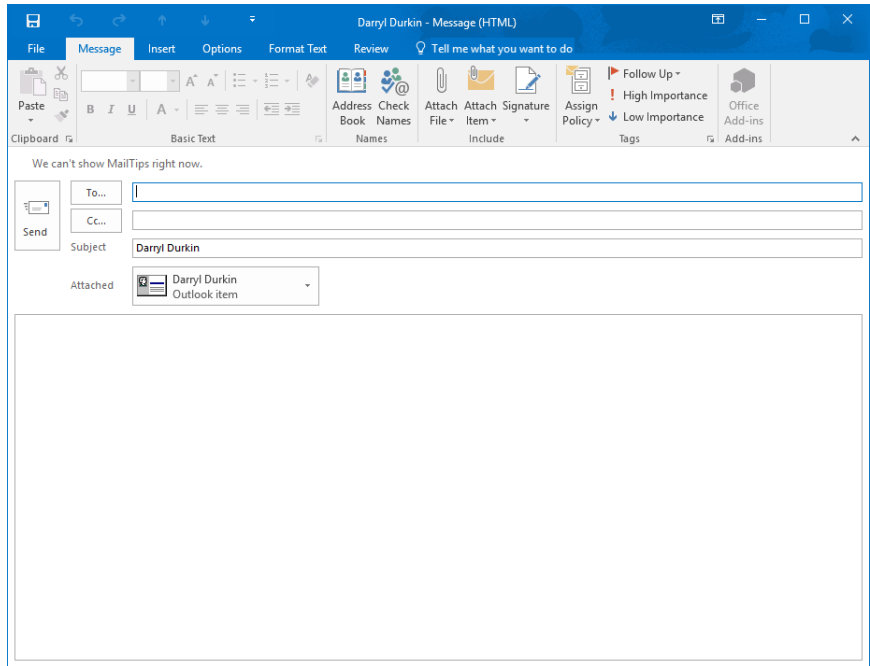
1. To begin, open Outlook 2016. Then, double-click the Activity 4-3.vcf file within your Exercise Files folder:



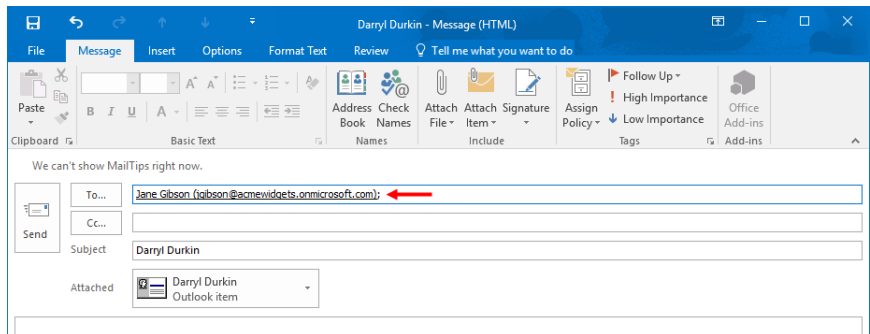
2. The contact for Darryl Durkin will now open. Next, click Home → Forward → As an Outlook Contact:



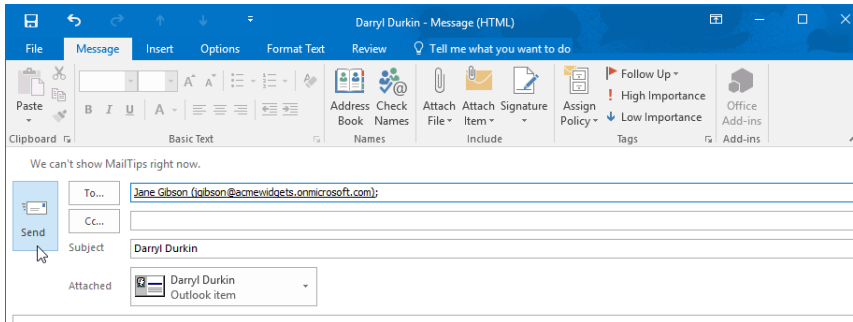
3. A Message window will open with the selected contact included as an attachment:



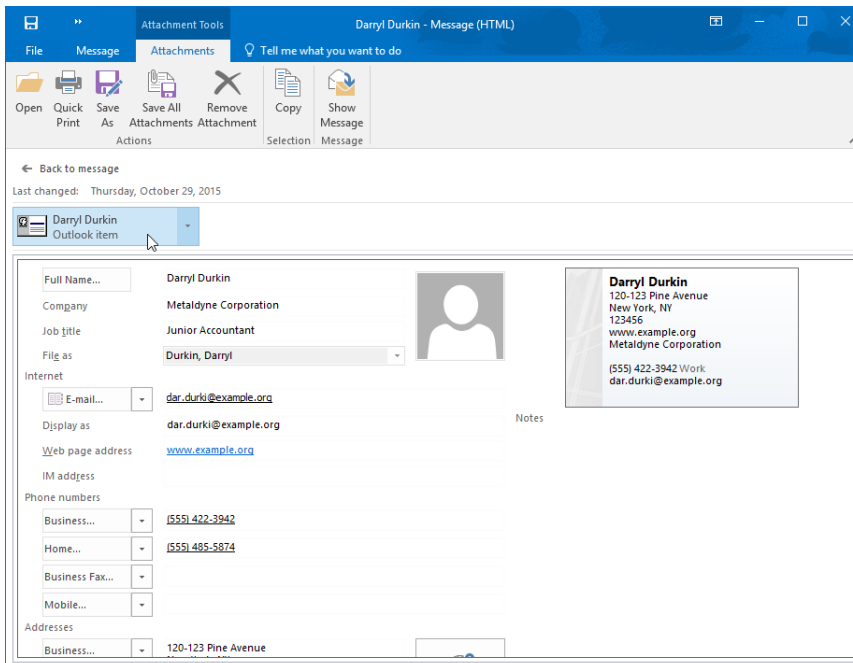
4. Inside the To field, type the e-mail address of your partner:



- As the Subject field has already been completed with the name of the contact, click the Send button:



- When you receive the contact information from your partner, examine the message in the Message window and click on the attachment to view its contents:



- Close the message and then close Microsoft Outlook 2016 to complete this exercise.

TOPIC D: Export Contacts

If you want to use your contact information with other applications, you will need to know how to export them. Over the course of this topic, you will learn all about exporting contacts from Outlook into a variety of different formats.

Topic Objectives

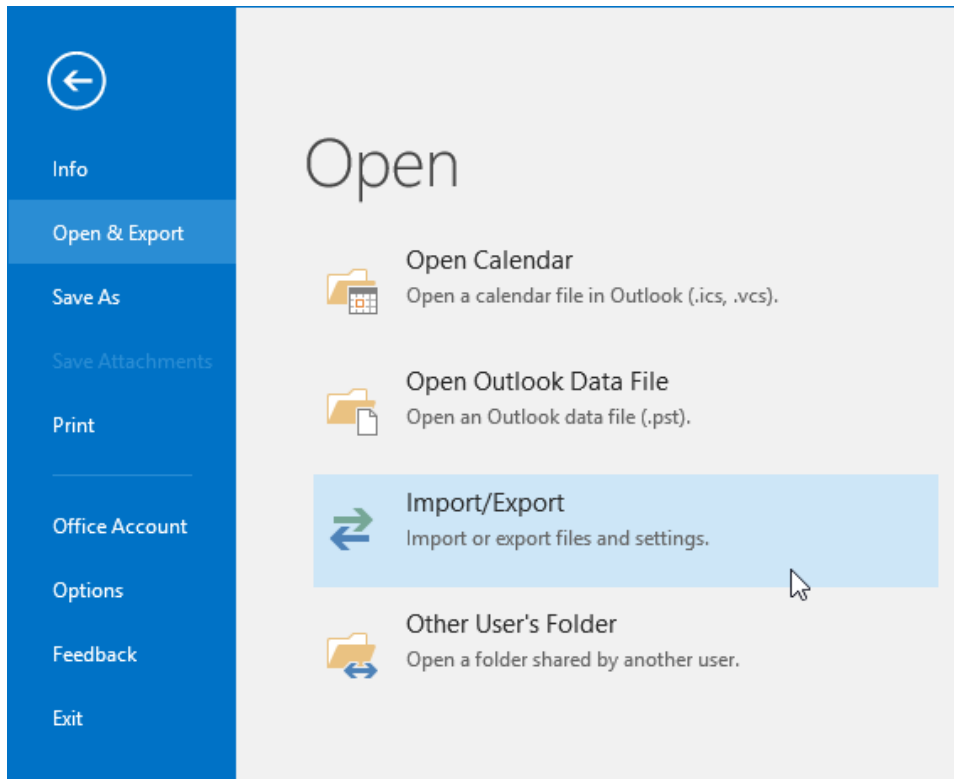
In this topic, you will learn:

- About the Export option
- About fields

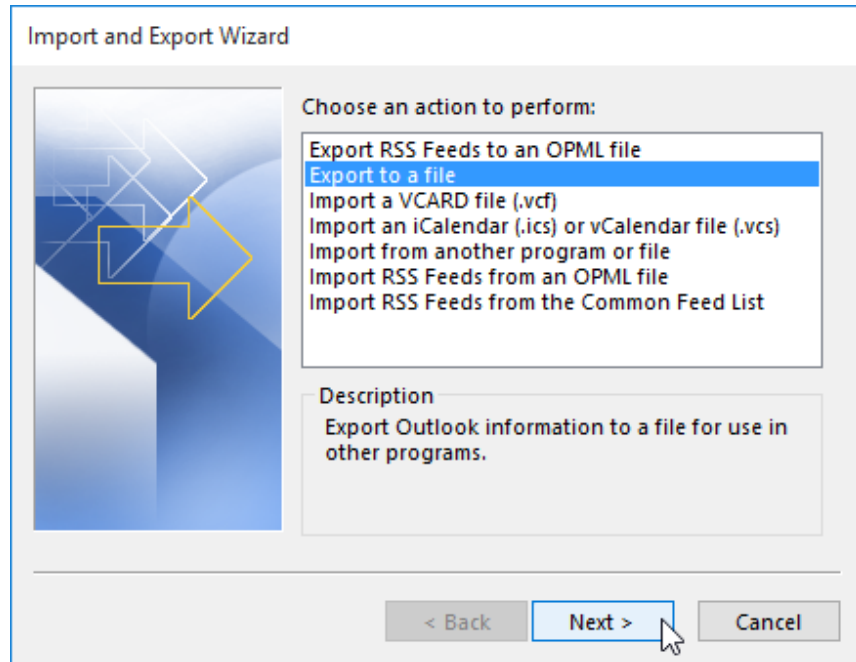
THE EXPORT OPTION

Exporting is a great way to back up your Outlook data (including contacts), as well as enable you to use it with other applications. Exporting your data doesn't remove it from Outlook; it just makes a copy of whatever items you select to another file.

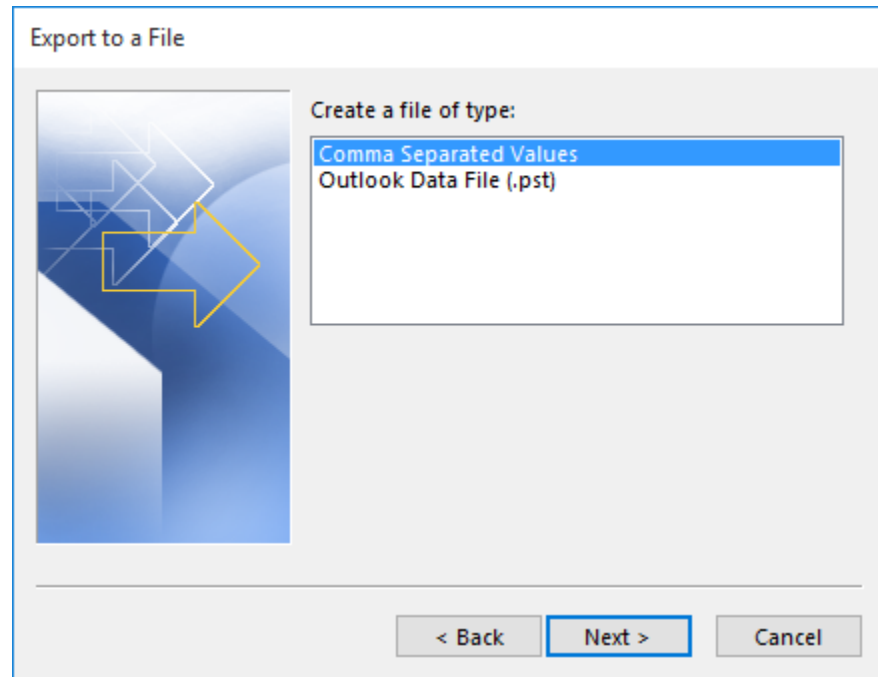
To use the export option, first select the contacts or folder that you would like to export. Then, click File → Open & Export → Import/Export:



This action will display the Import and Export Wizard. From the options presented, click “Export to a file” and then click Next:



The following screen will present you with a few different file types that you can choose from:



Here's an overview of these file types:

- **Comma Separated Values:** CSV file stores tabular data in plain text, where each line of the file is a data record. Each record then consists of one or more fields that are separated by commas.
- **Outlook Data File:** Exports your data as a .pst file.

After choosing a file type, click Next. You can then continue the wizard to choose a location where you want the exported data to be saved. You will also be given the chance to customize a few other settings depending on the data type you are exporting to and the original data.

FIELDS

Fields are containers that are allocated to hold specific information. Each of these fields are identified by a unique name. They are used to map content between different formats and are used extensively when transferring data between applications.

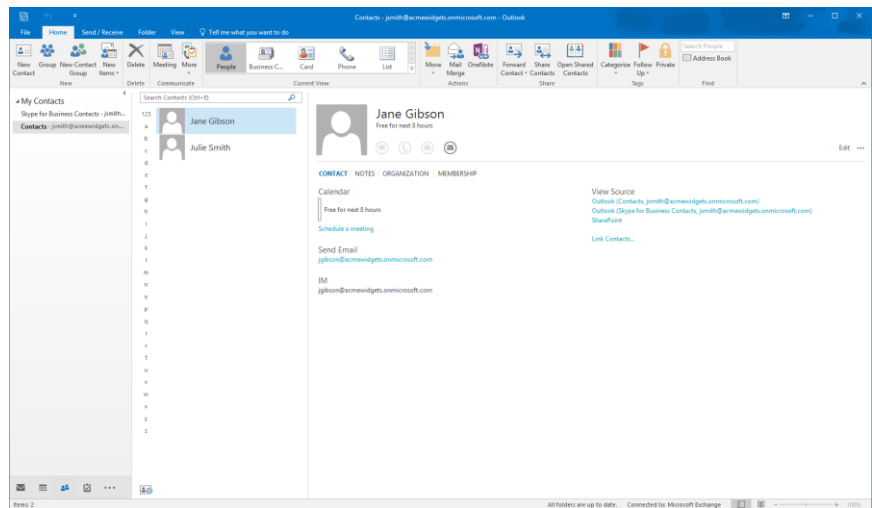
For example, suppose that you are exporting your contact list into a CSV file. As this is a table-based format, each field in the contact needs to be mapped to a column in the table of the file. Each individual contact that you export will then become a separate row (record) in the table.

ACTIVITY 4-4

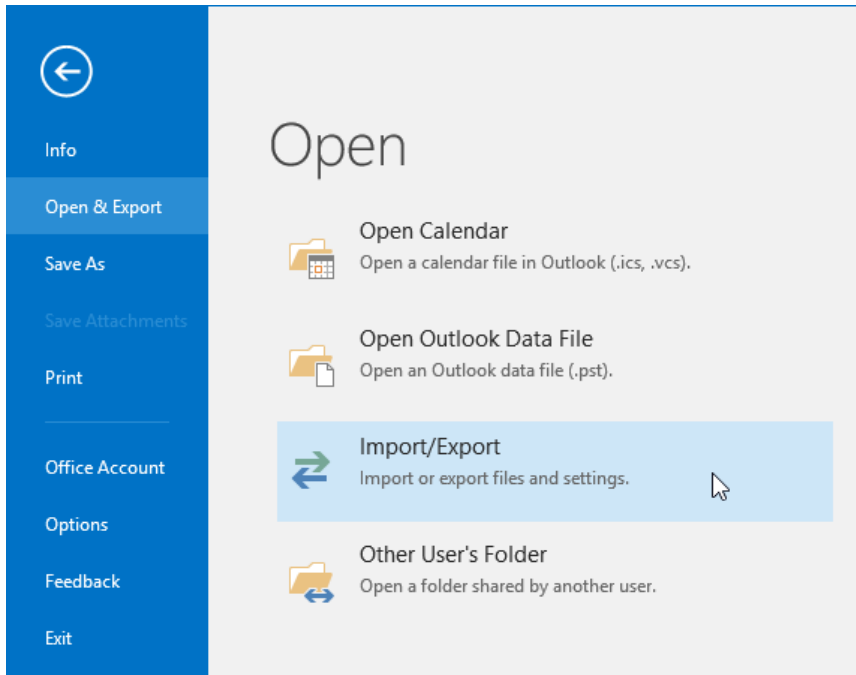
Exporting Contacts

You would like to export your contacts into a CSV file so that you can import them into another application.

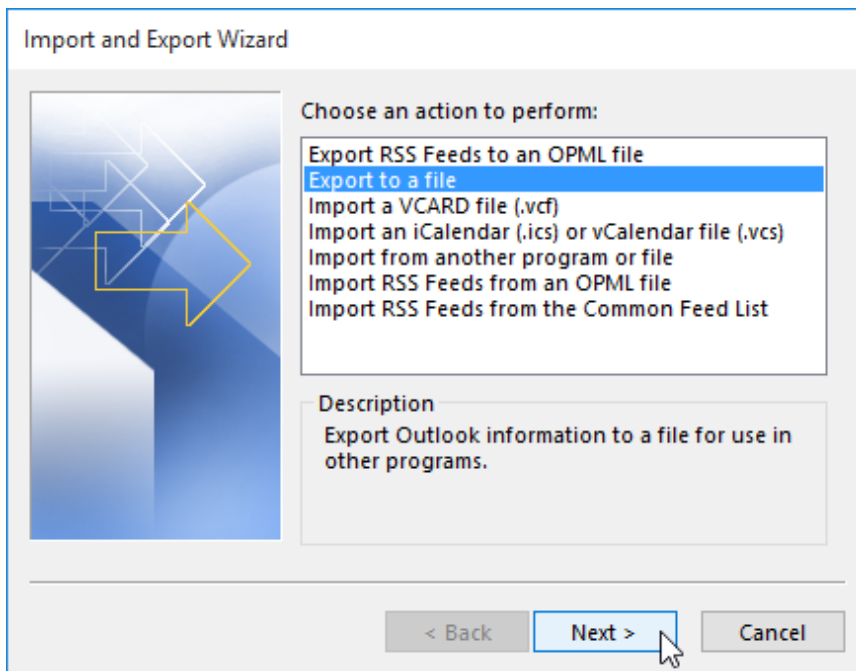
1. To begin, open Outlook 2016 and ensure that the People workspace is displayed:



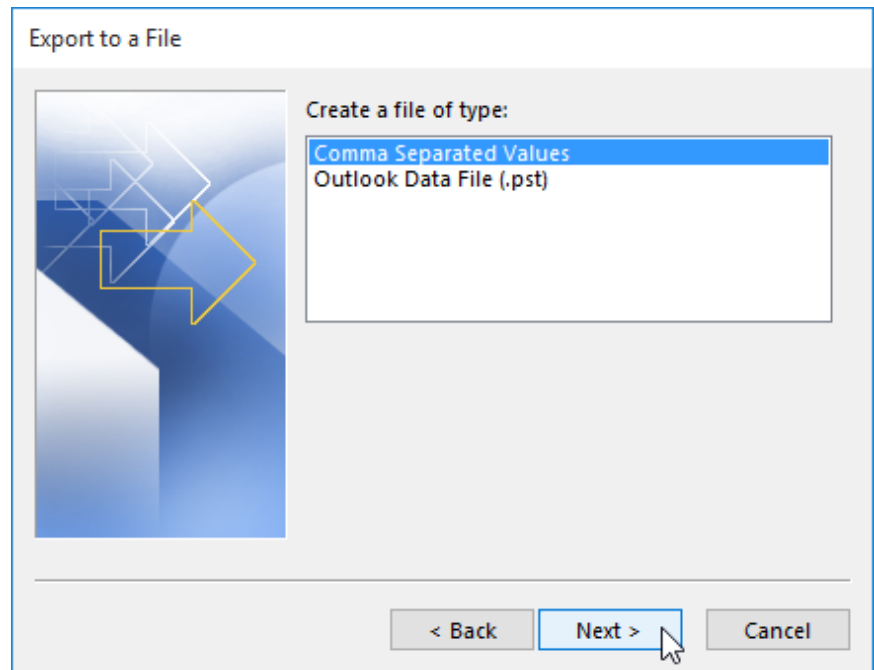
2. Click File → Open & Export → Import/Export:



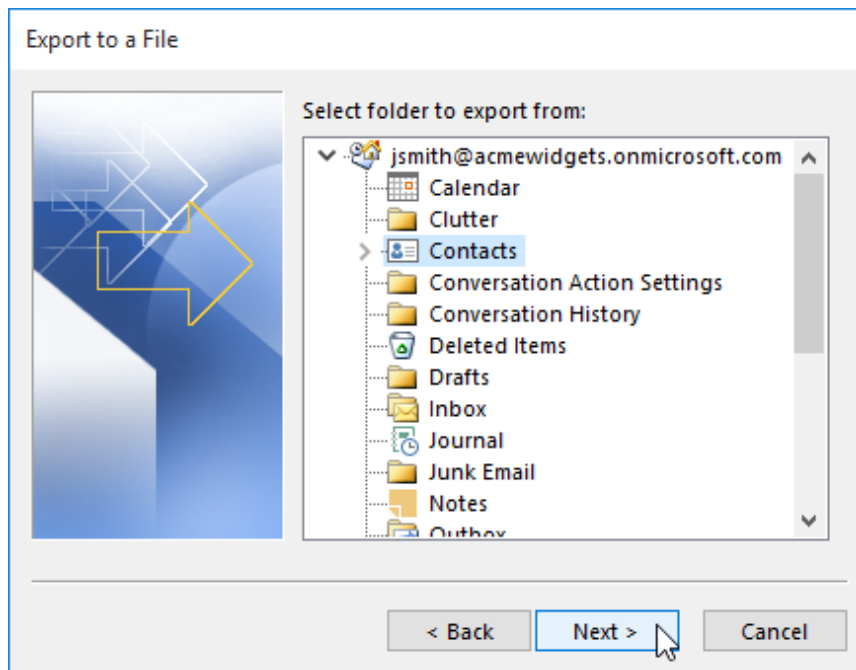
3. The Import and Export Wizard will now be displayed. Click to select the “Export to a file” option and then click the Next button:



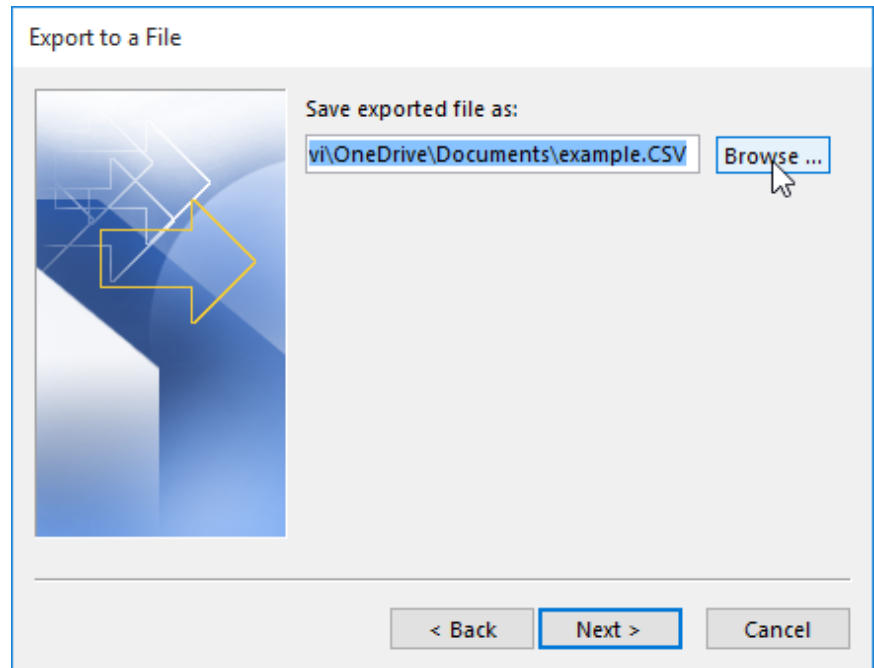
4. A list of file types that you can export your contacts to will now be shown. Click the “Comma Separated Values” option and then click Next:



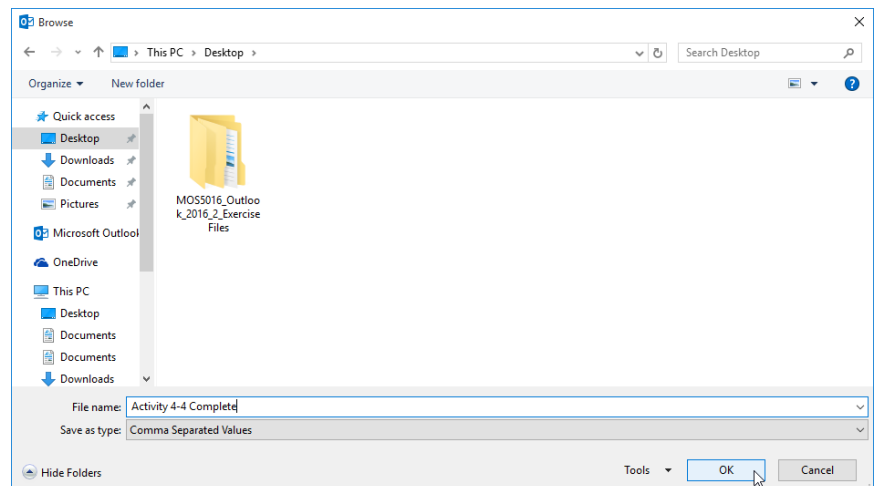
5. In the following screen, ensure that the Contacts folder is selected and then click Next:



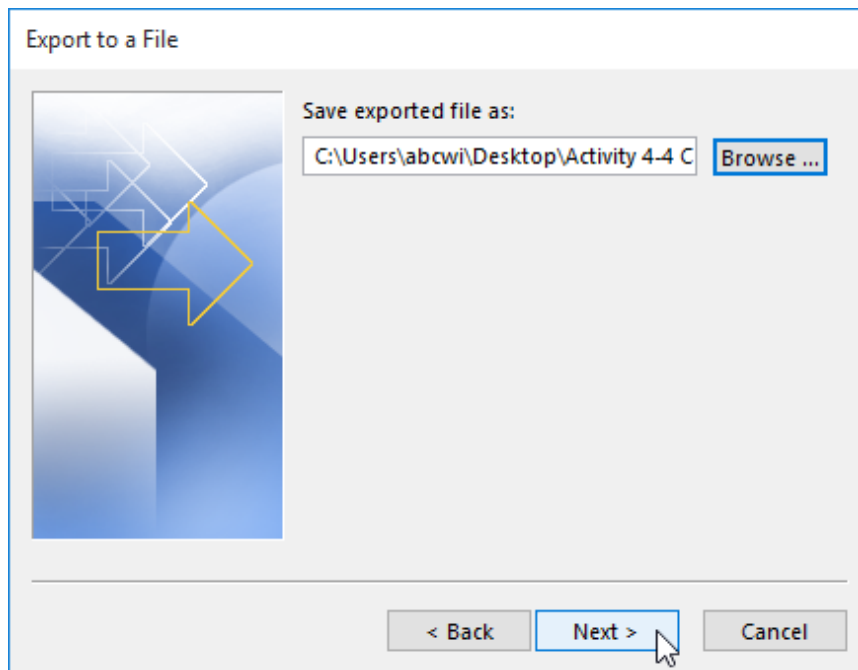
- Now you need to choose a name and location to save this exported data to. Click Browse:



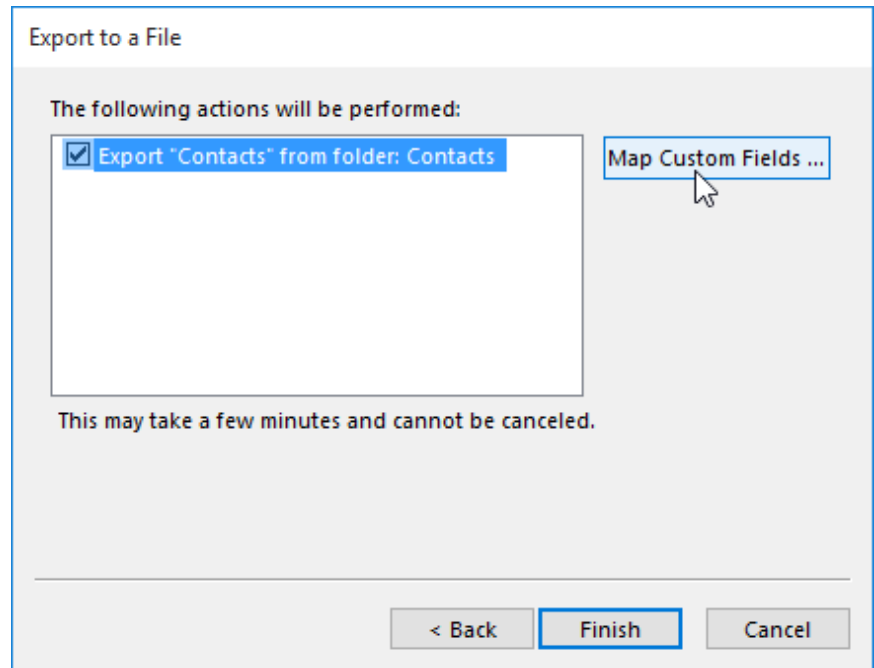
- With the Browse dialog box now open, use its controls to display your computer's desktop. Type "Activity 4-4 Complete" into the "File name" text box and then click OK:



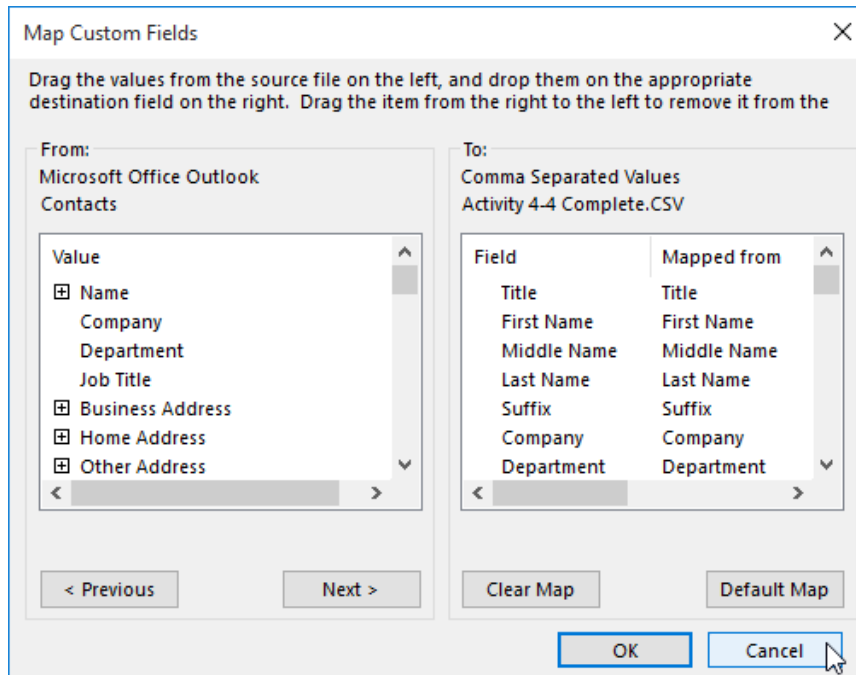
8. Returning to the Export to a File wizard, you will see the file location listed inside the text box. Click Next:



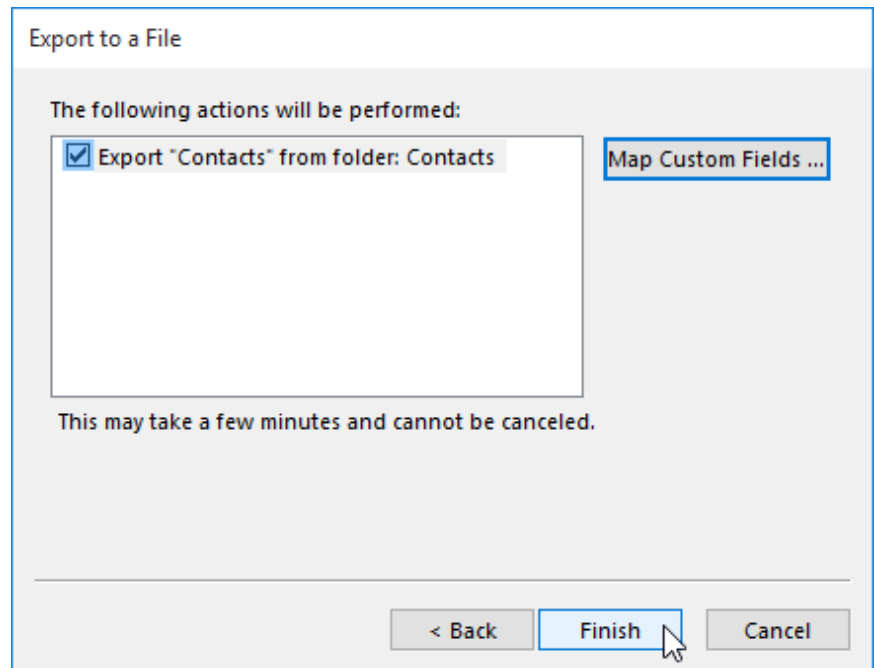
9. The last stage of the wizard will now be displayed. Click Map Custom Fields:



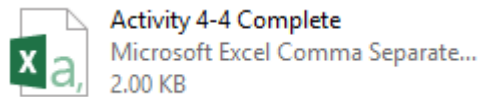
10. The Map Custom Fields dialog box will now be displayed. Examine the To section. You will see how the fields from a contact (Title, First Name, Last Name, etc.) are mapped to a fields in the CSV file that you are exporting the data to (Title, First Name, Middle Name, etc.). For this example the default settings are fine, so click Cancel to return to the wizard:



11. Now that you are back at the Export to a File wizard, click Finish:

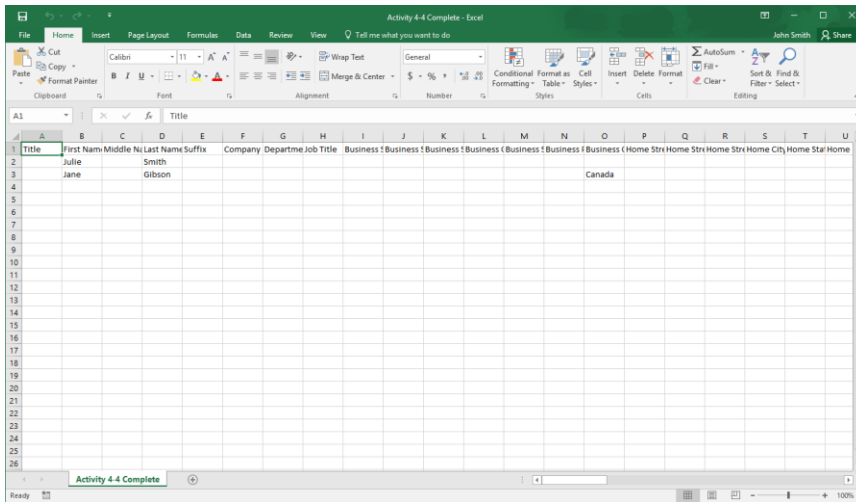


12. After a few moments, the data will be exported to your desktop as a CSV file. Double-click on this file to open it:



(If you do not have Microsoft Excel installed on your computer, skip to Step 14.)

13. You will now see all of the exported contact data listed in rows:



14. Close both Microsoft Excel and Microsoft Outlook to complete this exercise.

Summary

During this lesson you learned about the various settings and options that are available to you when managing contacts. You now know how to edit an electronic business card, as well as manage advanced contact options. Additionally you should now feel comfortable creating contact groups, forwarding contacts to other people, as well as exporting contacts (and other Outlook items) to different formats.

REVIEW QUESTIONS

1. How do you view your contacts as business cards?
2. What is a contact group?
3. How do you delete a contact group using the ribbon?
4. What are the three possible options that you can use to forward a contact?
5. What is the command sequence to launch the Import and Export Wizard?

LESSON 5: SHARING WORKSPACES WITH OTHERS

Lesson Objectives

In this lesson you will learn how to:

- Delegate access to mail folders
- Share your calendar
- Share your contacts

TOPIC A: Delegate Access to Mail Folders

An often forgotten Outlook feature is the ability to delegate access to your mail folders to other people if you are using a Microsoft Exchange e-mail account. This would be useful, for example, if you wanted to have someone handle your e-mail on your behalf while you were away. During this topic you will learn how to delegate access to your mail folders.

Topic Objectives

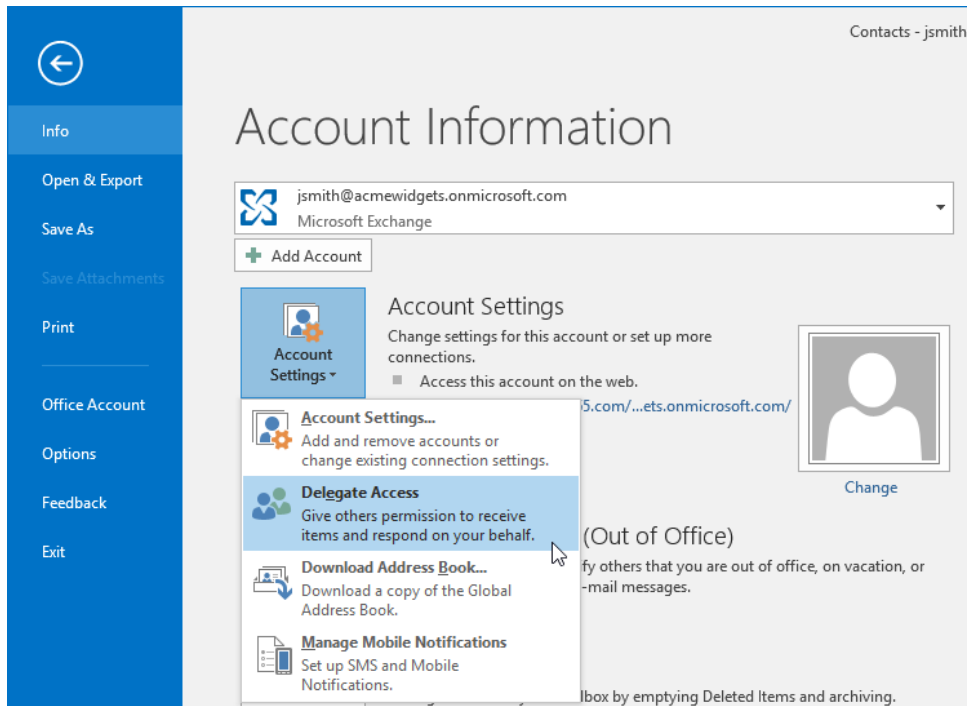
In this topic, you will learn:

- About delegates
- About permission roles

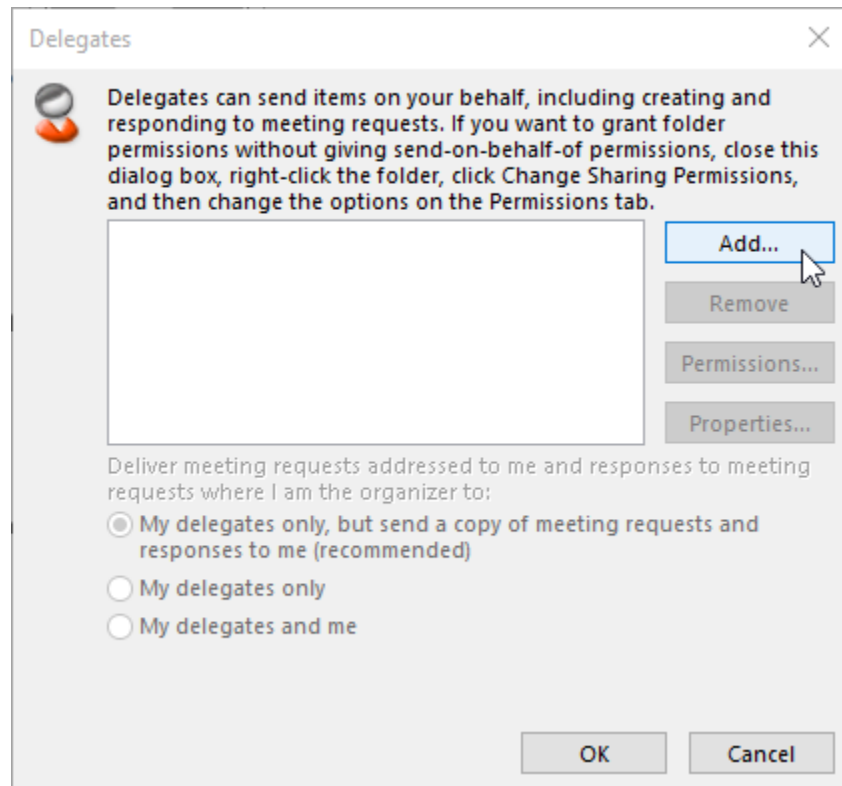
DELEGATES

In Outlook, the term “delegates” refers to any users who have access to another user’s mail folders. This can potentially enable them to receive, respond to, and send e-mail on that user’s behalf depending on the level of access that has been given to them.

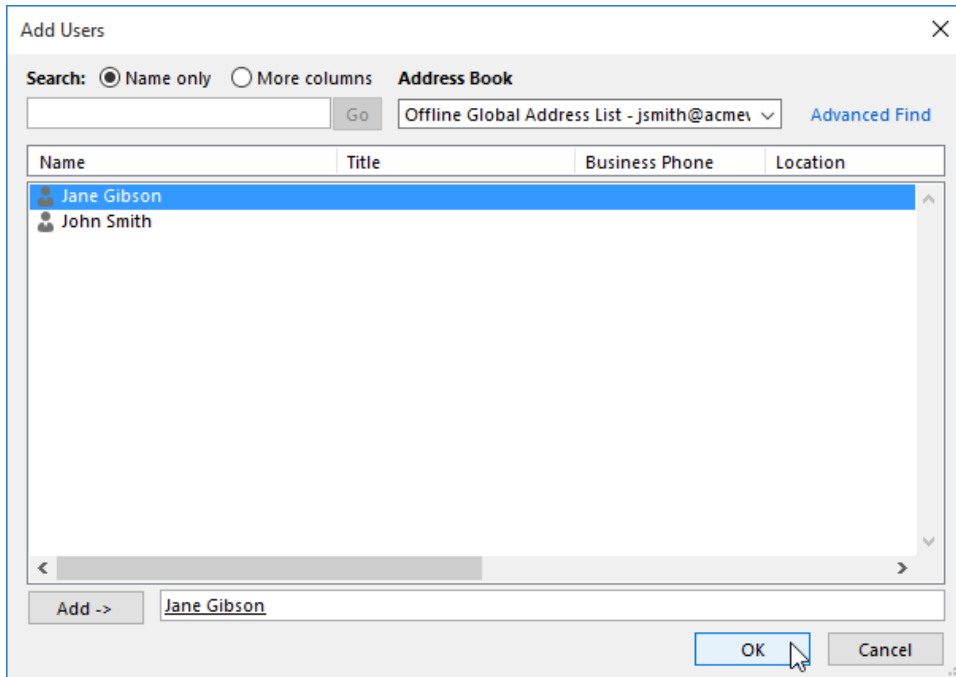
To set up delegate access, click File → Info → Account Settings → Delegate Access:



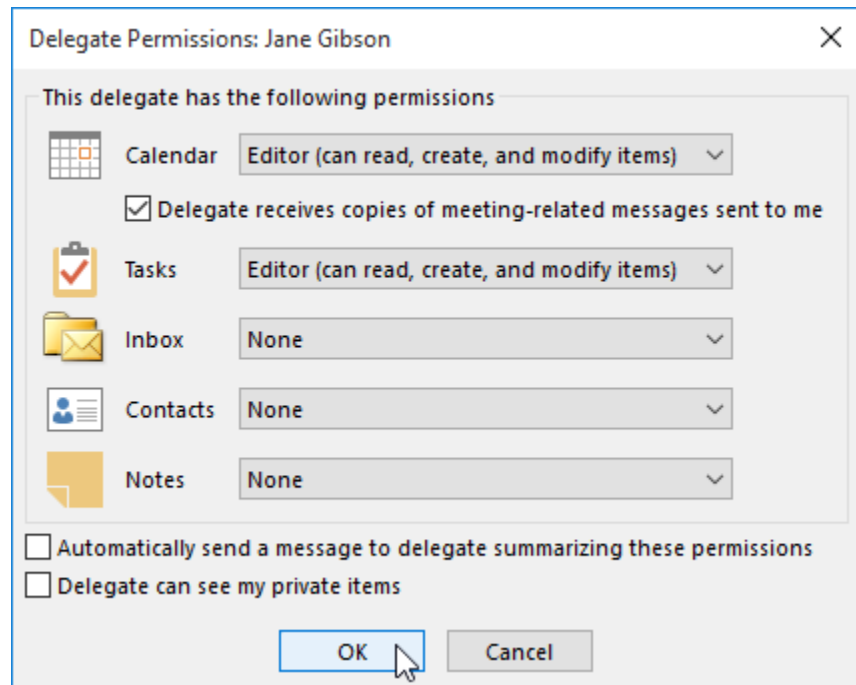
This action will display the Delegates dialog box. Click Add:



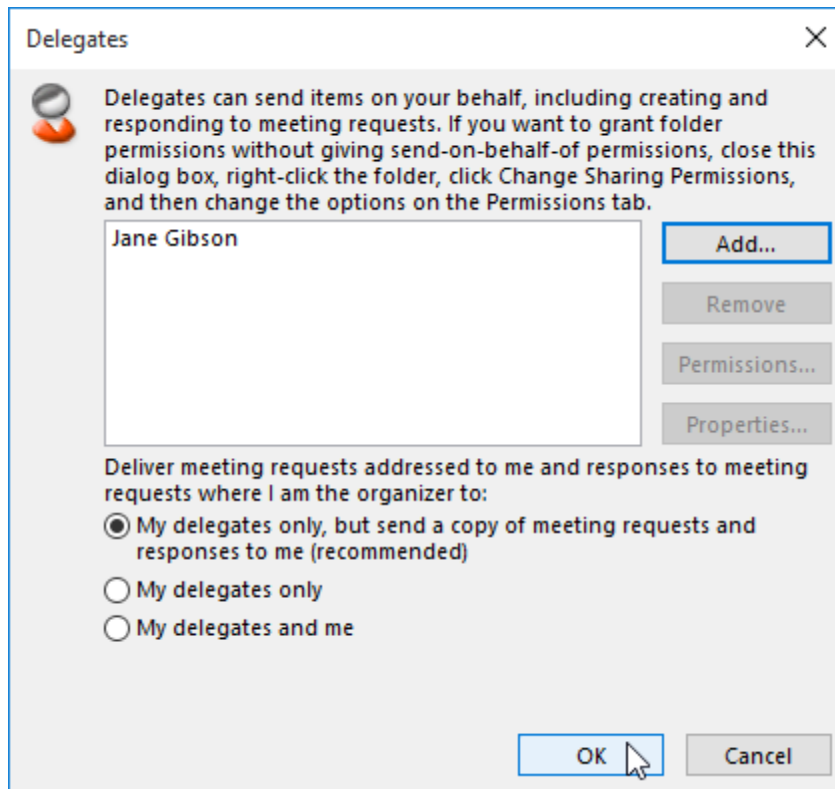
The Add Users dialog box will then display contacts from your Address Book. Choose the desired delegate from the user list and click Add. Click OK when you are finished:



At this point, the Delegate Permissions dialog box will open and provide you with options to customize exactly what the delegate will have access to. When you are ready to continue, click OK:

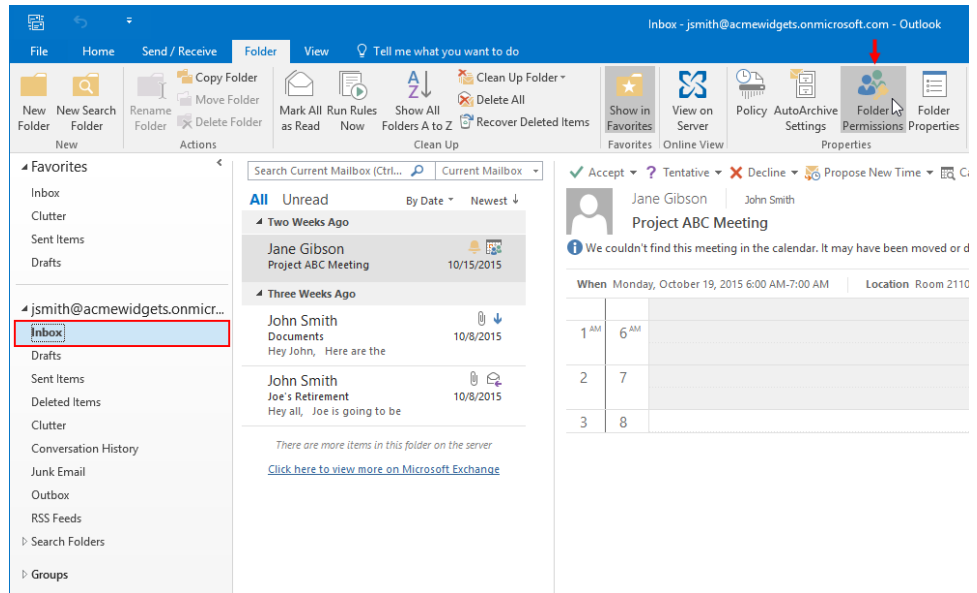


The Delegates dialog box will then reflect any delegates that you have added, as well as give you the option to choose how meeting requests are handled. Click OK to complete the process:

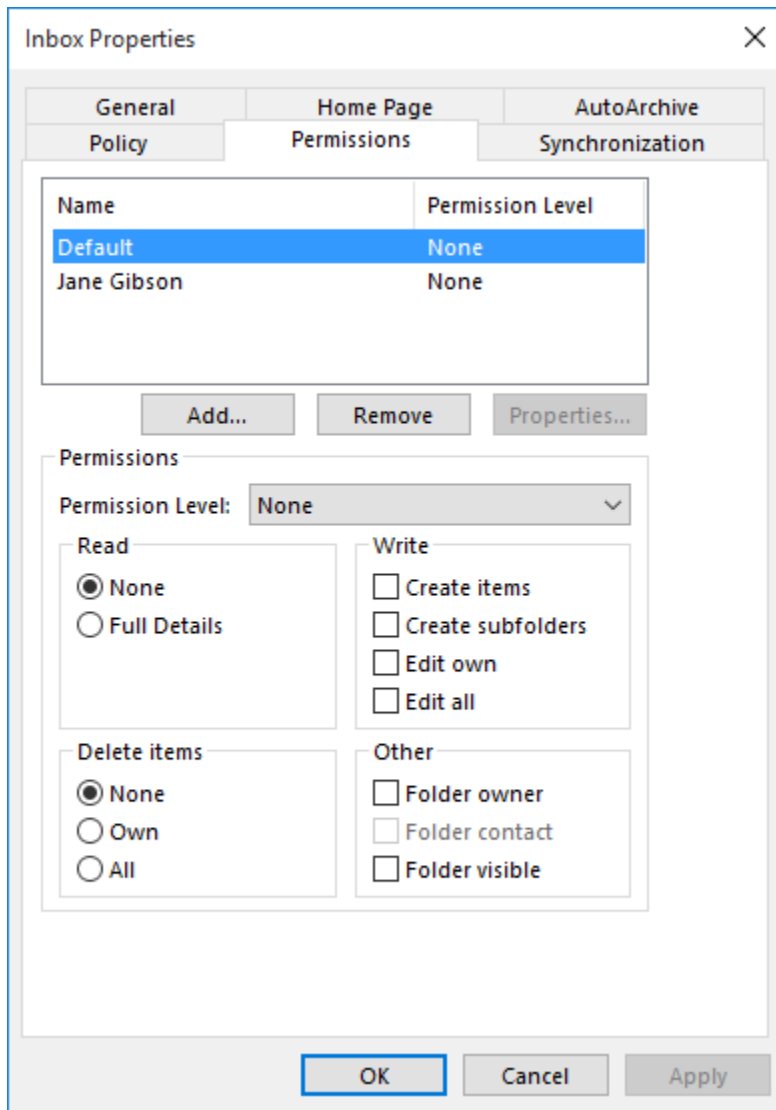


PERMISSION ROLES

Permission roles are used to control what delegates can have access to. To set permission roles on your Exchange Server mailbox, click the top level of the mailbox (typically your e-mail address) or choose a specific folder in the Navigation pane. Next, click Folder → Folder Permissions:

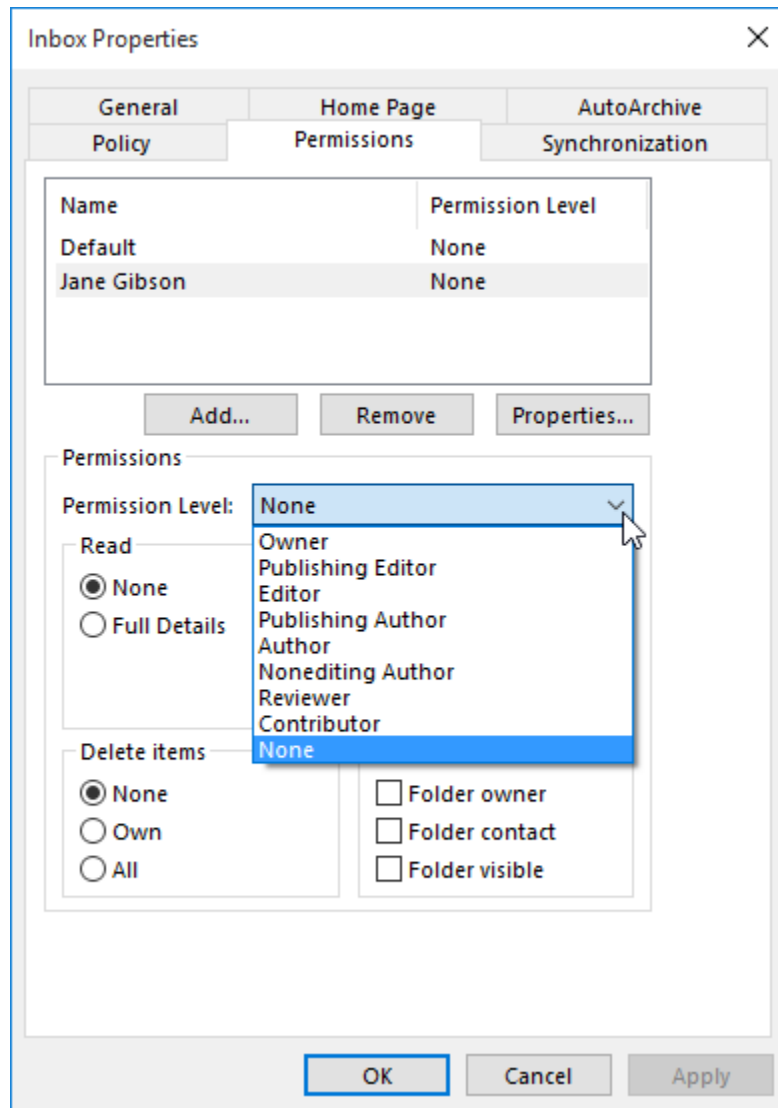


The Properties dialog will then open to the Permissions tab and provide you with controls that you can use to choose exactly who has access to the selected folder and what they can do:



(You can assign new delegates to this folder by clicking the Add button and remove existing ones using the Remove button.)

Each name that is listed at the top of dialog can be assigned a permission role that will automatically assign appropriate permissions for each category. To do this, click to select the name of the user that you would like to assign a permission level to and then click the Permission Level drop-down menu:



There are lots of different permission levels that you can choose from, including the following:

- **Owner:** This permission level can be assigned to only one person and is usually the owner of the account. This permission role provides total permissions for everything, including read, create, modify, and delete options.
- **Publishing Editor:** This role allows a delegate to read, create, modify, and delete any item within the selected folder or account. They are also able to create subfolders.
- **Editor:** This role gives the delegate permission to read, create, modify, and delete items. They do not have permission to create subfolders.
- **Publishing Author:** This role gives delegates the ability to read and create items and subfolders. However, they can only edit or delete items that they have created.
- **Author:** If a delegate is assigned this role, they are able to create items, but they will only be able to edit or delete the items that they themselves have created.
- **Nonediting Author:** This role will give a delegate the ability to read and create items.
- **Reviewer:** A delegate given this role will only be able to read items. They will not be able to create or edit items.
- **Contributor:** A delegate given this role cannot view or read existing content, but they can create items.
- **None:** This role will provide the delegate with no ability to read or take action on items.
- **Custom:** Using the controls in lower portion of this dialog box, you specify exactly what combination of read, write, delete, and other permissions you would like to apply to a user.

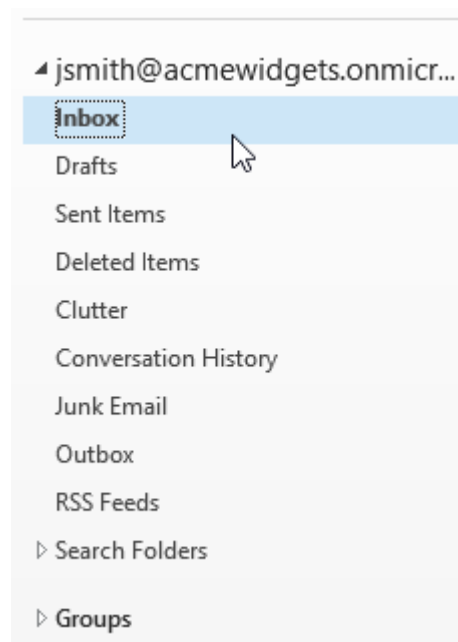
ACTIVITY 5-1

Delegating Access to Mail Folders

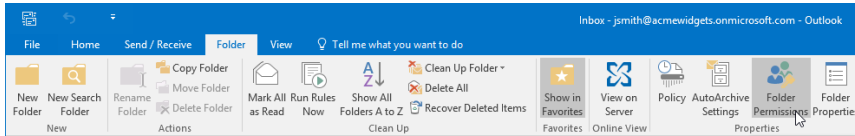
You are going away for a few days and you would like one of your colleagues to be able to keep an eye on your Inbox folder; however, you only want to give them read access.

Note that students will need to pair up in order to complete this exercise. Both students must be using a Microsoft Exchange Server e-mail account within the same organization.

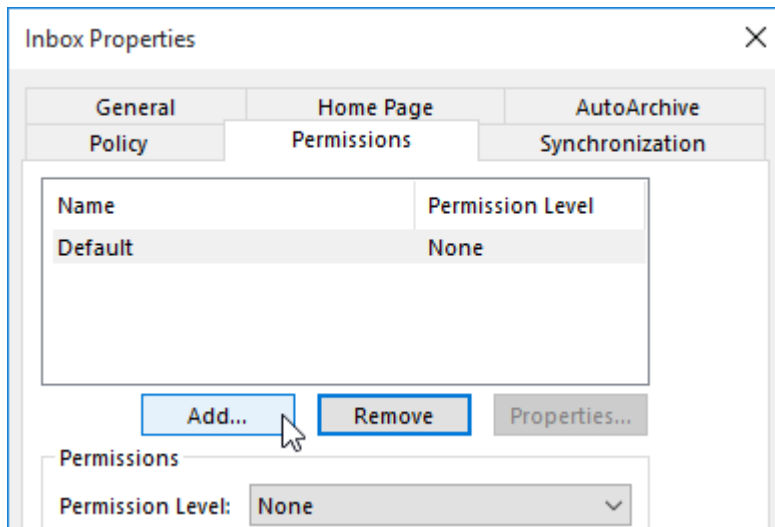
1. To begin, open Outlook 2016 and ensure that the Mail workspace is displayed.
2. In the Navigation pane, click to select your Inbox folder:



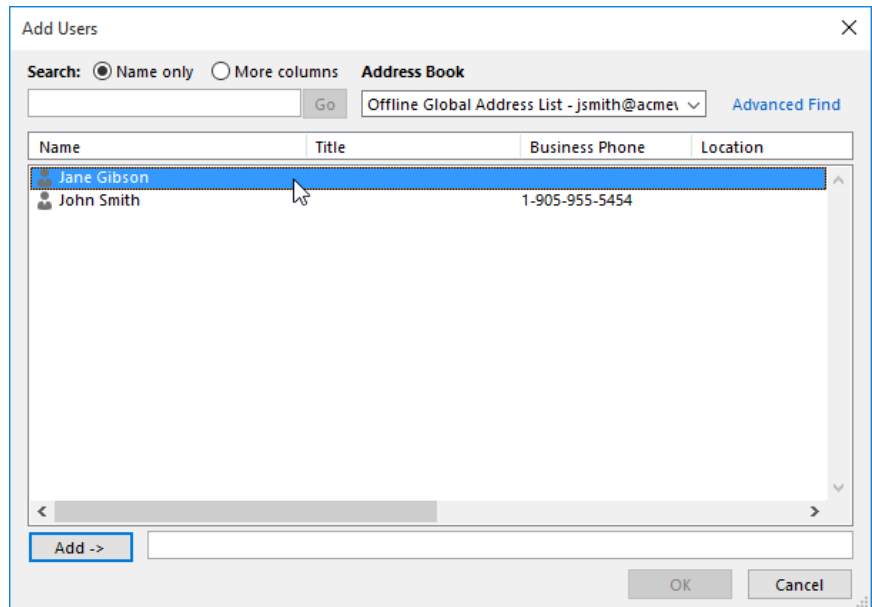
3. Click Folder → Folder Permissions:



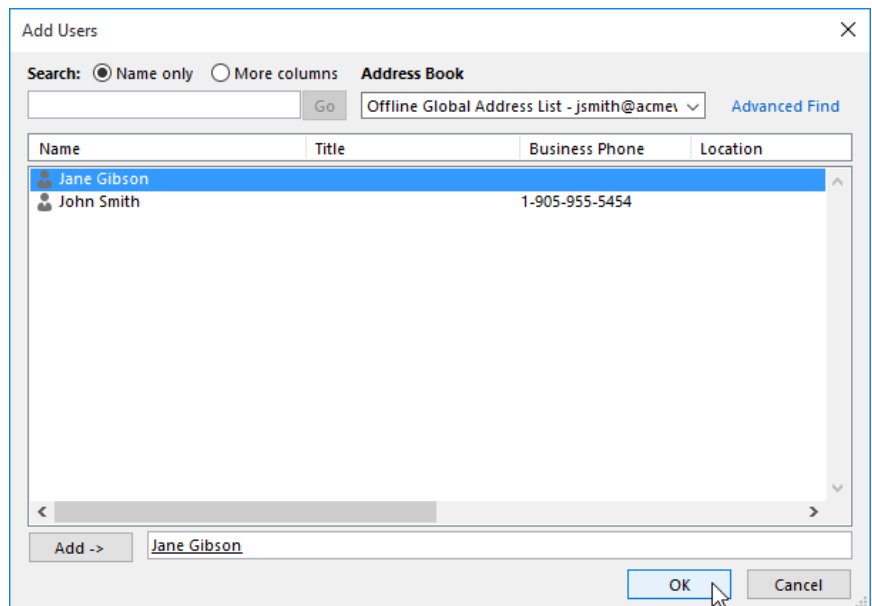
4. The Properties dialog box will now be displayed with the Permissions tab shown. Click the Add button:



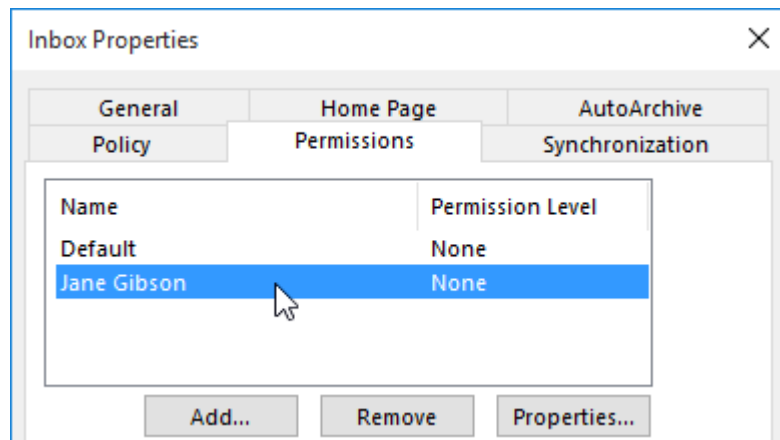
5. In the Add Users dialog box, locate the contact listing for your partner and click on it to select it:



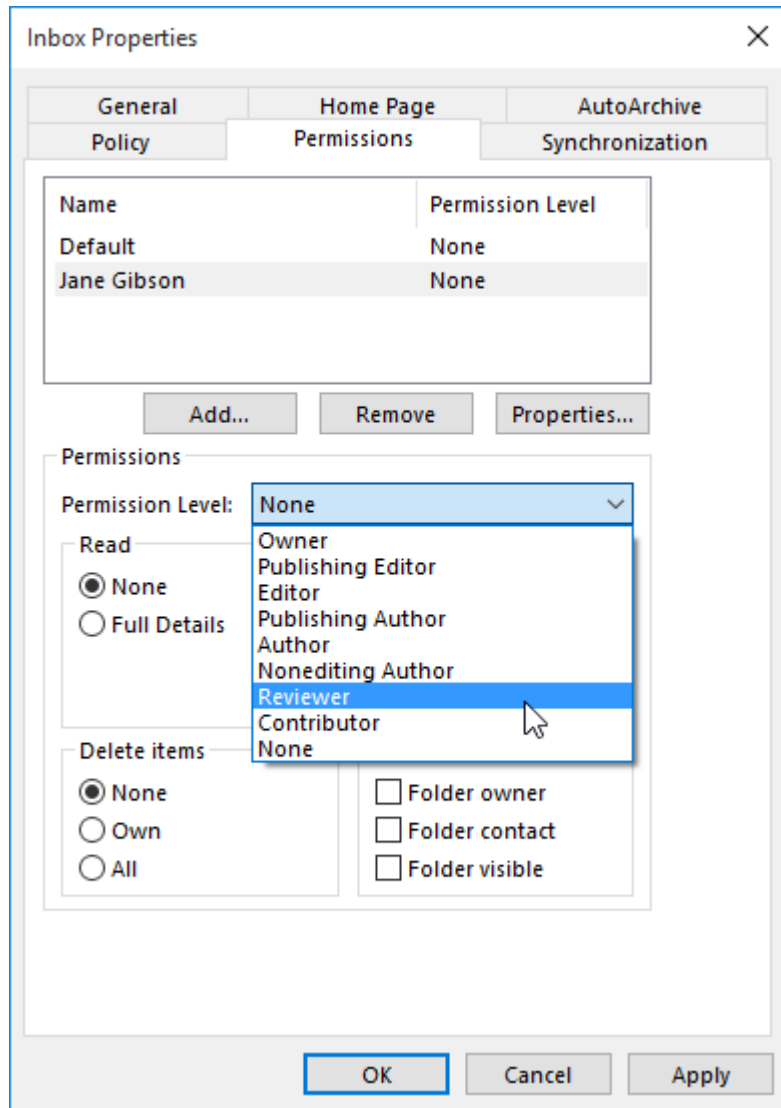
6. Click the Add button and then click OK:



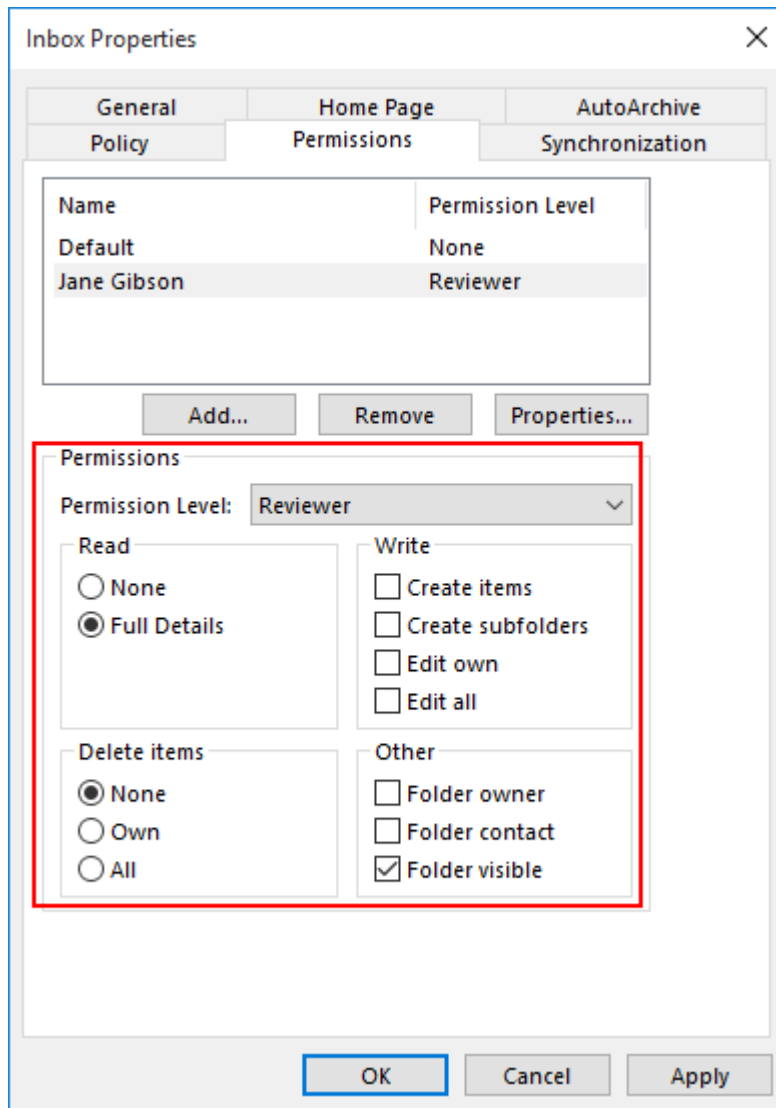
7. The name of your partner will now be listed in the upper half of the Properties dialog box. Click to select that name:



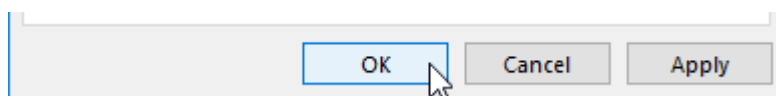
8. With the name of your partner selected, click the Permission Level drop-down and click the Reviewer permission role:



- Review the controls in the Permissions section. You will see that they have changed to incorporate the settings from the Reviewer permission role:



- Click OK to apply the new settings:



11. Close Microsoft Outlook 2016 to complete this exercise.

TOPIC B: Share Your Calendar

To facilitate the planning of meetings, tasks, and appointments, you can share your calendar with other people. Depending on the permission level that you choose, you can allow others to view what items you have entered into your calendar, and your busy and free moments. Over the course of this topic, you will learn how to share your calendar.

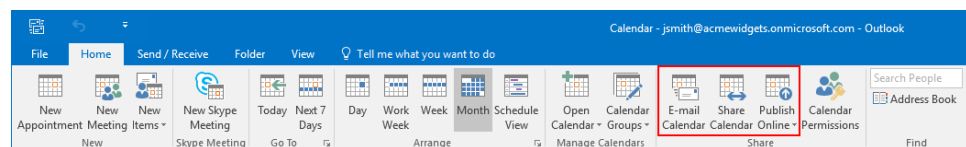
Topic Objectives

In this topic, you will learn:

- About the share calendar options

SHARE CALENDAR OPTIONS

There are a few different ways that you can share your calendar with other people. You can find all of these options within the Share group of the Home tab while the Calendar workspace is displayed:



Here is an overview of these options:

- Clicking the **E-mail Calendar** command allows you to send a snapshot of your calendar as an attachment. This snapshot will only encompass a specified date range.
- The **Share Calendar** option allows you to grant other Outlook users permission to access your calendar. Like other sharing options, you can customize the level of detail that you would like to share with others.
- Finally, the **Publish Online** command allows you to publish your entire calendar on the Internet. This will allow anyone you choose to view the calendar whether they use Outlook or not.

Internet Calendars

Internet Calendars are simply calendars that are shared (and sometimes managed) through the Internet. For example, Google Calendar and Microsoft Calendar are both types of Internet Calendars. These types of calendars usually use iCalendar format (.ics). This is a standard format that facilitates the sharing of calendar information between people regardless of the application that they are using to view or manage their calendar information.

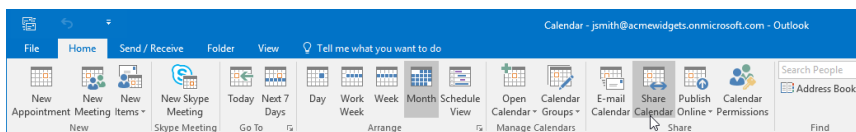
ACTIVITY 5-2

Sharing Your Calendar with Another User

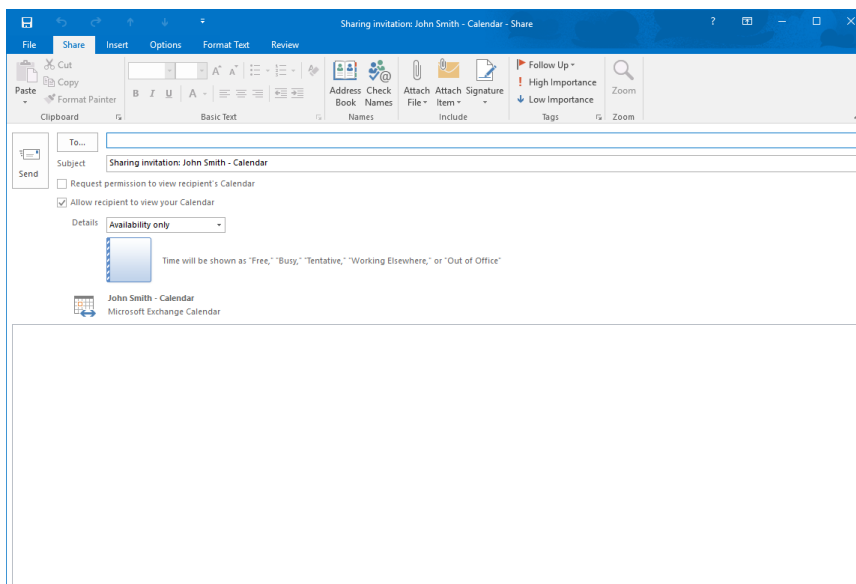
As you and a colleague will be working closely with one another for a new project, you would like to share your calendar with them so that you can more easily coordinate meetings.

Note that students will need to pair up in order to complete this exercise. Both students must be using a Microsoft Exchange Server e-mail account within the same organization.

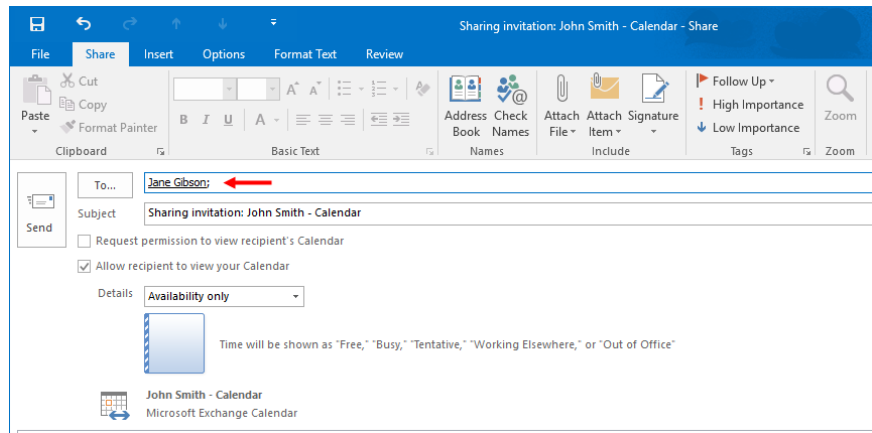
1. To begin, open Outlook 2016 to the Calendar workspace.
2. Click Home → Share Calendar:



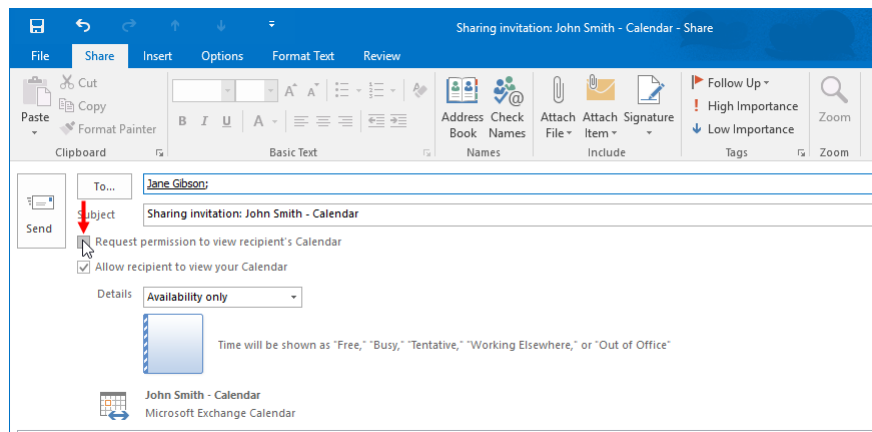
3. A special message window will now be open:



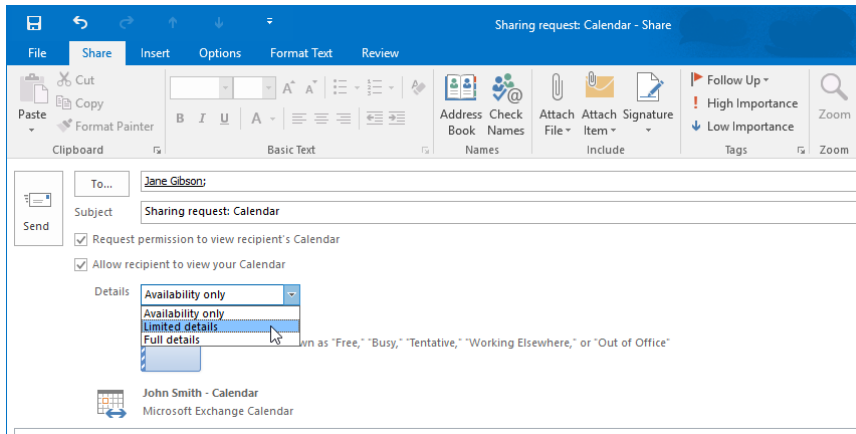
4. Inside the To field, enter the e-mail address of your partner:



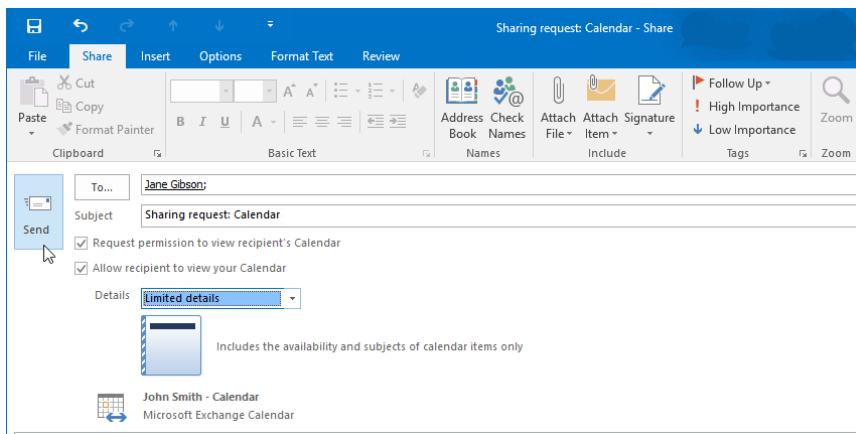
5. As you would also like to view your partner's calendar, check the "Request permission to view recipient's Calendar" checkbox just below the Subject field:



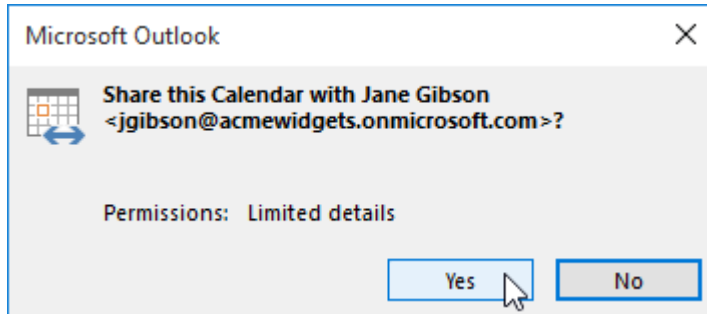
- At this point you can choose the level of detail that you would like to share with the recipient. By default the “Availability only” detail level will be applied. This will only show your calendar in sections of “Free,” “Busy,” “Tentative,” or “Out of Office.” Using the Details drop-down menu, choose the “Limited details” option:



- Now any items that appear within your calendar will include the related subject. Click the Send button:



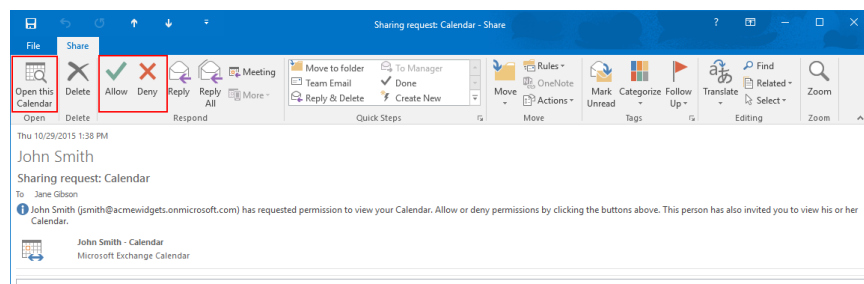
8. A dialog box will appear that asks you to confirm your choice to share your calendar with the recipient you entered, using the selected permission level. Click Yes:



9. Outlook will prepare and then send your message to the recipient.

(Note that you may see an error indicating that you cannot share your calendar with someone due to the selected permission level. If this is the case, change the permission level back to “Availability only” and try again.)

10. Now, you and your partner should see the calendar sharing request in your inboxes with commands to allow or deny them. Additionally, you will be able to open the calendar by clicking Share → Open this Calendar:



11. Close Microsoft Outlook 2016 to complete this exercise.

TOPIC C: Share Your Contacts

Just as you can share your calendar, you can share your contacts with other people as well. Over the course of this topic you will learn how to share your contacts with others, as well as view contacts that have been shared with you.

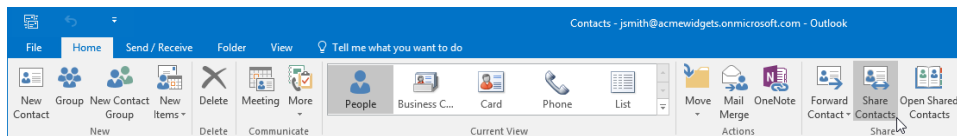
Topic Objectives

In this topic, you will learn:

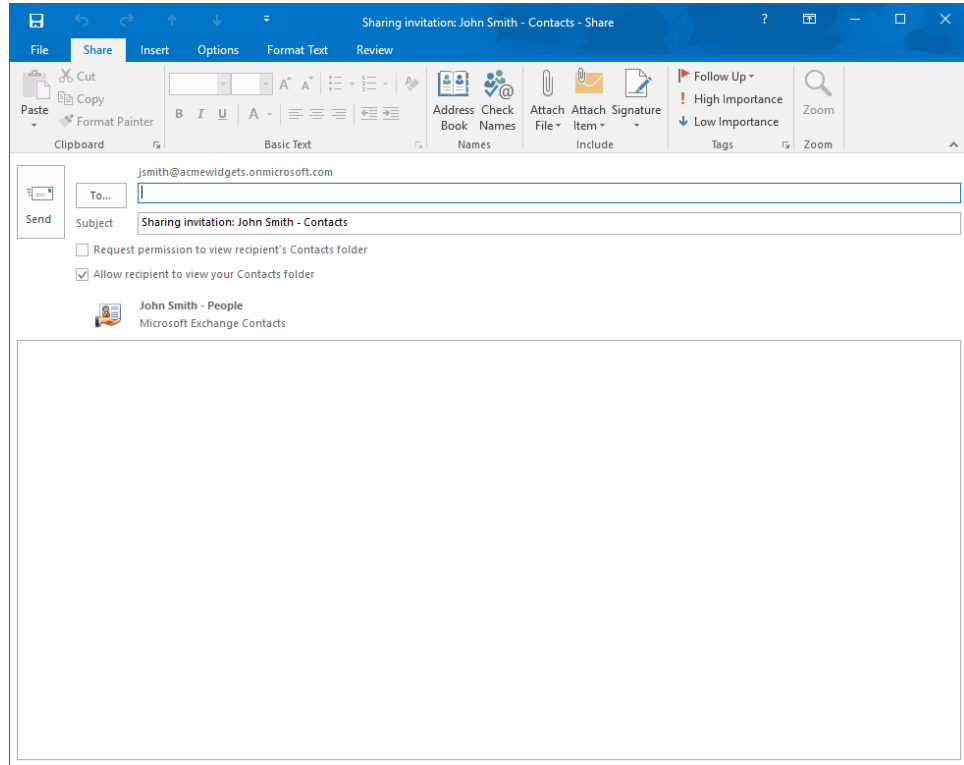
- About the Share Contacts command
- How to view shared contacts

SHARE CONTACTS COMMAND

If your mailbox uses Microsoft Exchange Server, you are able to share contacts by clicking Home → Share Contacts while the People workspace is displayed:

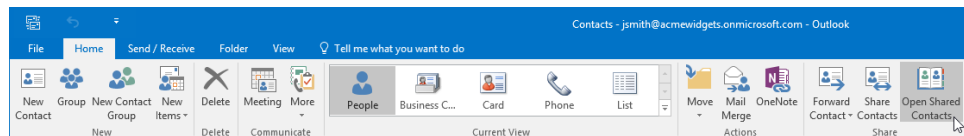


This action will display a special message window that includes your contacts as a kind of attachment. Using the provided controls, you can enter the e-mail address of anyone that you would like to share your contacts with, as well as request permission to view their contacts:



VIEW SHARED CONTACTS

If another person has shared their contacts with you, you will receive an e-mail notifying you of this. You can then view their contacts using the link provided in the e-mail or by clicking Home → Open Shared Contacts while in the People workspace:



Any time that you open shared contacts, a folder containing those contacts will appear in the Navigation pane under the Shared Contacts header.

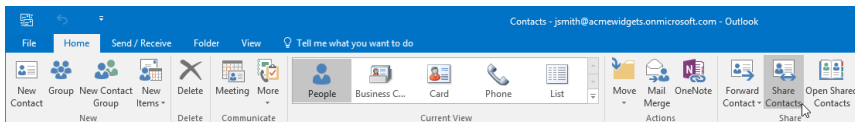
ACTIVITY 5-3

Sharing Your Contacts

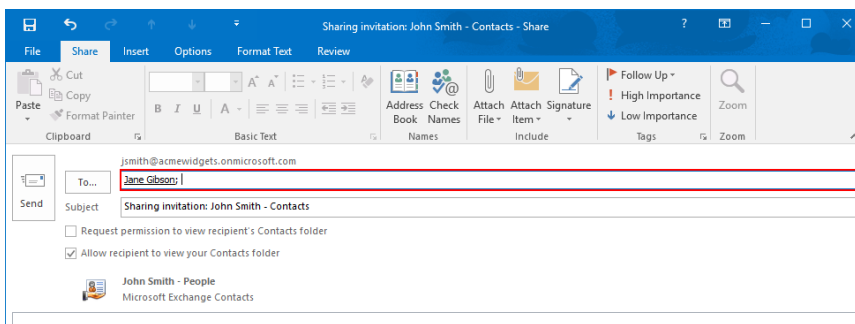
You are going on vacation for a week and another member of your team needs to communicate with your clients. You would like to share your contacts with your colleague so that they have all the contact information that they need.

Note that students will need to pair up in order to complete this exercise. Both students must be using a Microsoft Exchange Server e-mail account within the same organization.

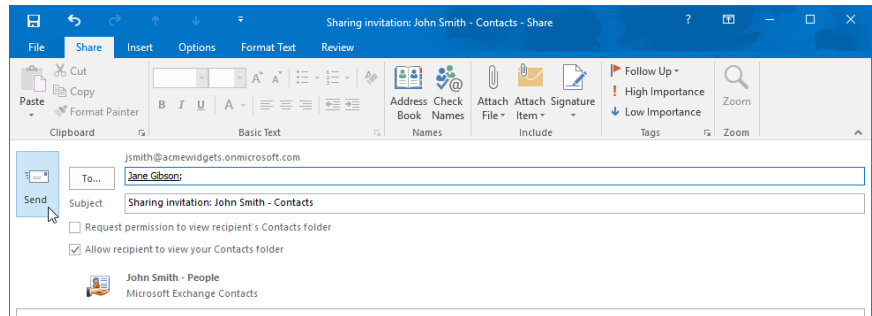
1. To begin, open Outlook 2016 and display the People workspace.
2. Click Home → Share Contacts:



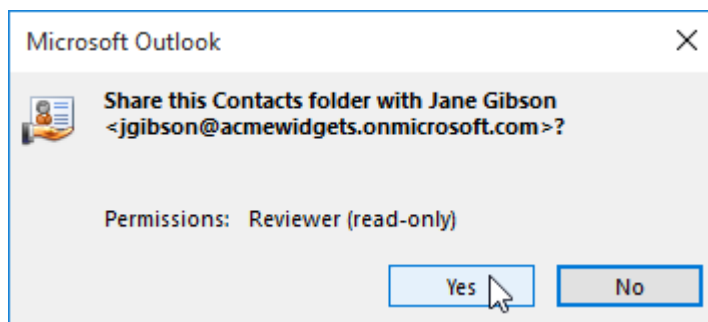
3. A special message form will now be displayed. Type your partner's e-mail address into the To text box:



4. Click Send:



5. A dialog box will appear that asks you to confirm your choice of sharing your Contacts folder with the recipient you entered. Click Yes to continue:



6. The message will be sent and your contacts will now be shared with the recipient. Close Microsoft Outlook 2016 to complete this exercise.

Summary

Over the course of this lesson, you learned about the various ways that you can share Outlook information with others. You should now be able to share both your calendar and your contacts with others inside and outside of your organization. Additionally, you should also be comfortable delegating access to mail folders in your account.

REVIEW QUESTIONS

1. **Who are delegates?**
2. **What is the command sequence to start setting the permission roles for a selected folder or mailbox?**
3. **What are the three options available to you that you can use to share your calendar?**
4. **What are the three detail levels that are available when you are sharing your calendar with another person?**
5. **What is the command sequence to view any shared contacts that you have available?**

LESSON 6: MANAGING OUTLOOK DATA FILES

Lesson Objectives

In this lesson you will learn how to:

- Back up Outlook data files
- Change data file settings

TOPIC A: Back Up Outlook Items

It is generally a good idea to back up important data on a regular basis, including Outlook data. Outlook data files save copies of individual Outlook items in a single file. Over the course of this topic you will learn how to back up Outlook items using Outlook data files.

Topic Objectives

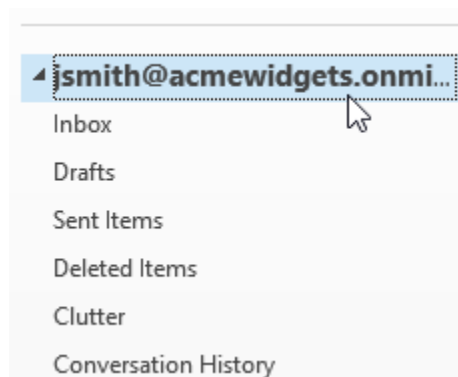
In this topic, you will learn:

- About Outlook data files

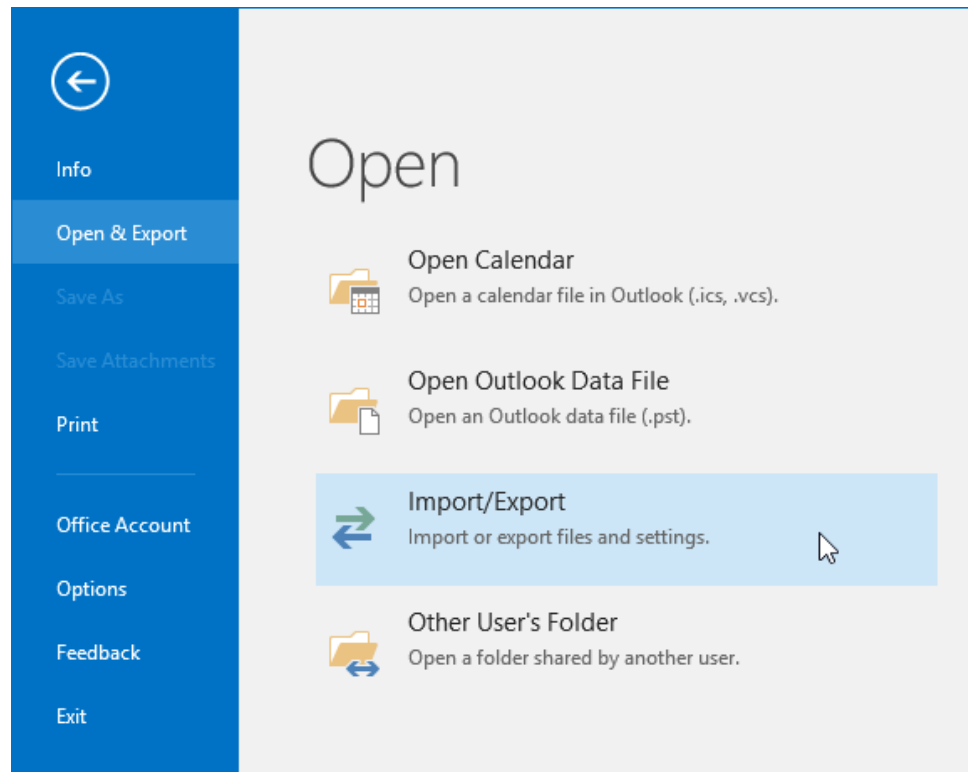
OUTLOOK DATA FILES

Outlook data files are used to hold all of the items that exist in your Outlook mailbox. These files are created automatically when you first set up an e-mail account on your computer and will grow as you accumulate more items. To provide more mobility and give you an opportunity to back up your data, you are able to create more Outlook data files that you can then store elsewhere. You can then open this file and have access to all of your data at the time you backed it up from any copy of Microsoft Outlook 2016.

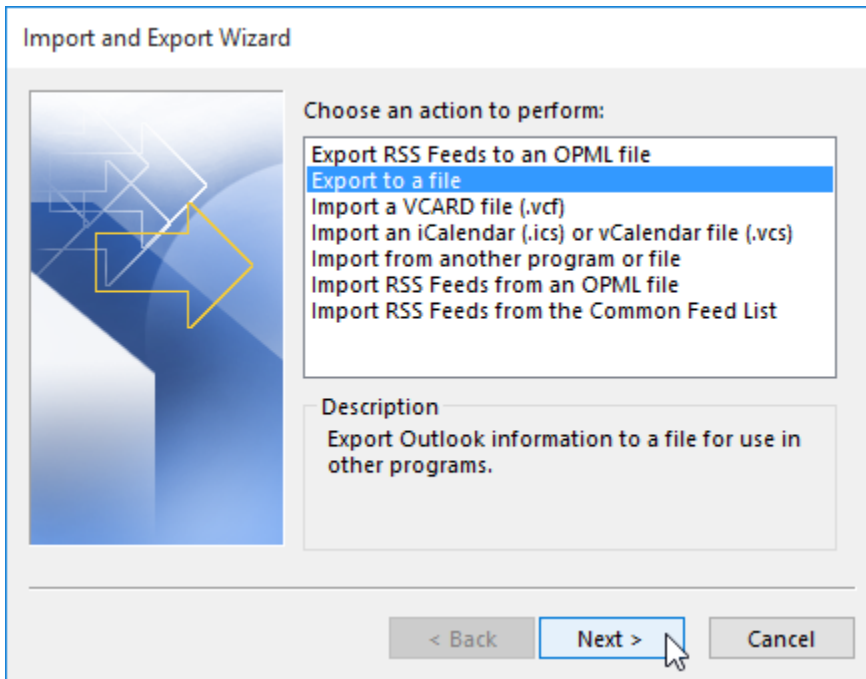
To back up the data in your mailbox, ensure that the top level item in the Navigation for your mailbox is selected (usually your e-mail address):



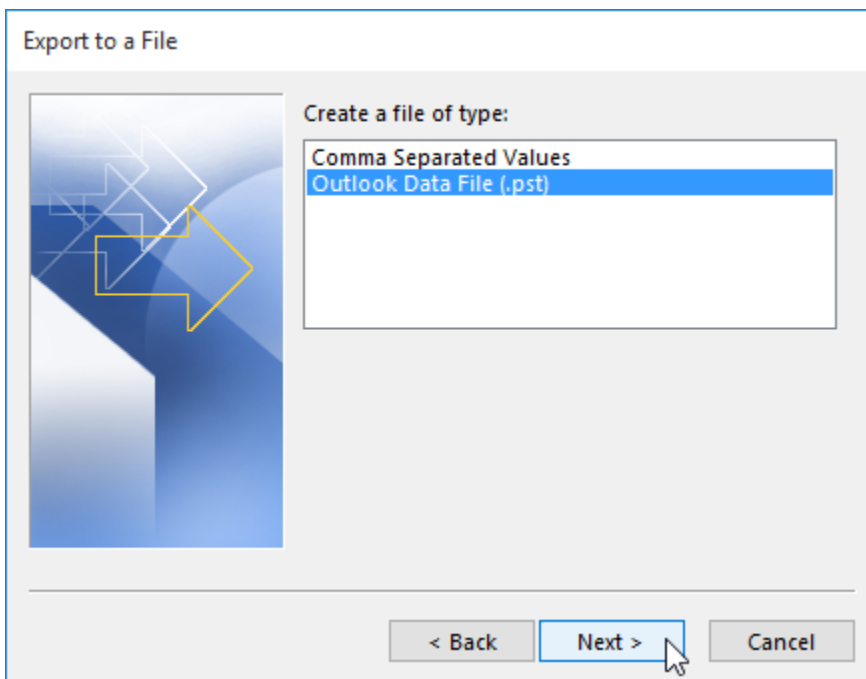
Next, click File → Open & Export → Import/Export:



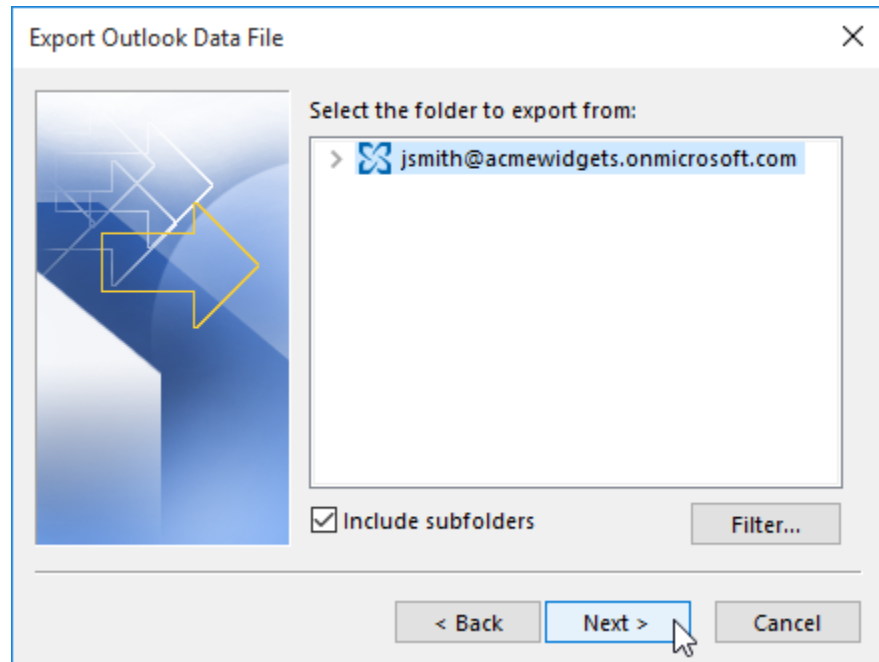
The Import and Export Wizard will then be displayed. Here, select the “Export to a file” option and click Next:



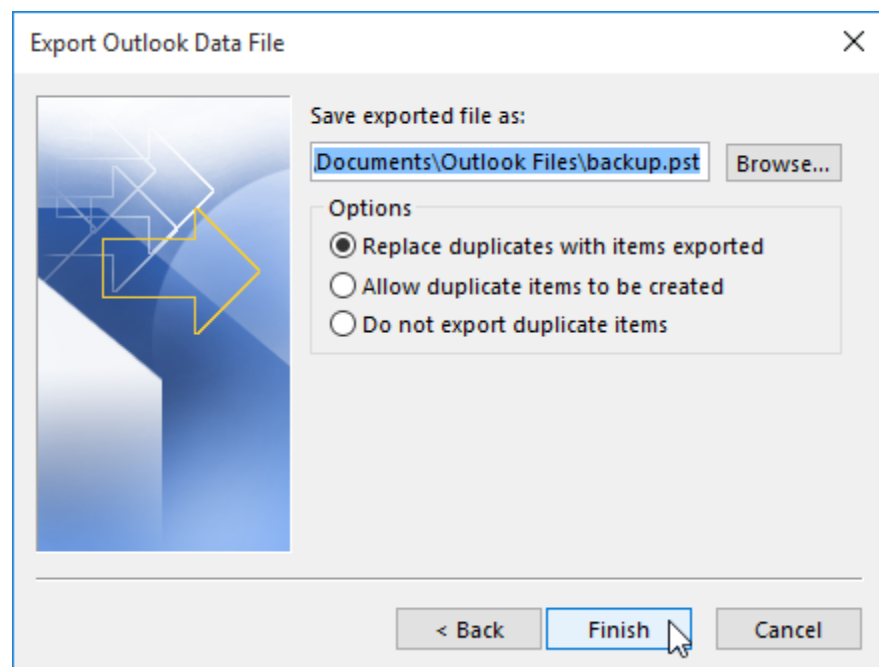
The next stage will offer a few different file types that can be chosen from. In this case, you would click “Outlook Data File (.pst)” and click Next:



If you would like to back up your whole mailbox, ensure that it is selected and click Next:



Finally, you can choose where you want the data file exported to and what file name will be used. Click Finish to start the save process:



Note that while you will be prompted to give this new data file a password to protect its contents, this step is optional.

Outlook Data Files and Version Compatibility

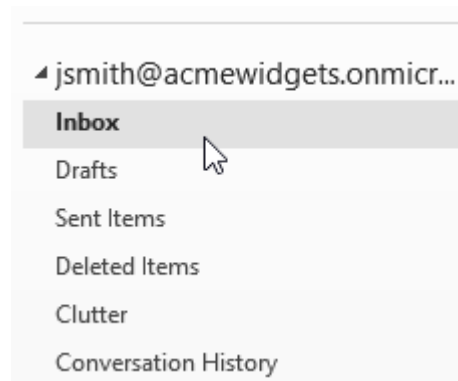
Outlook data files that are saved using Outlook 2016 are compatible with Outlook 2007, Outlook 2010, and Outlook 2013; however, some items in that file may not be. In this case it is recommended that you open the data file rather than import it directly into Outlook.

ACTIVITY 6-1

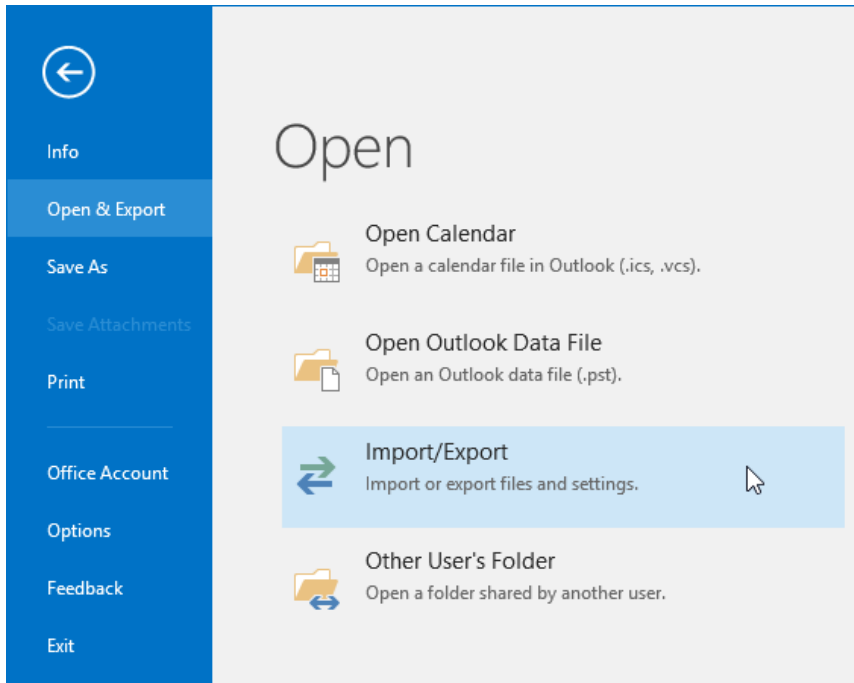
Backing Up Outlook Items

Your inbox is starting to grow and its contents contain very important information. To ensure that this information is never lost, you would like to back up your inbox to an Outlook data file.

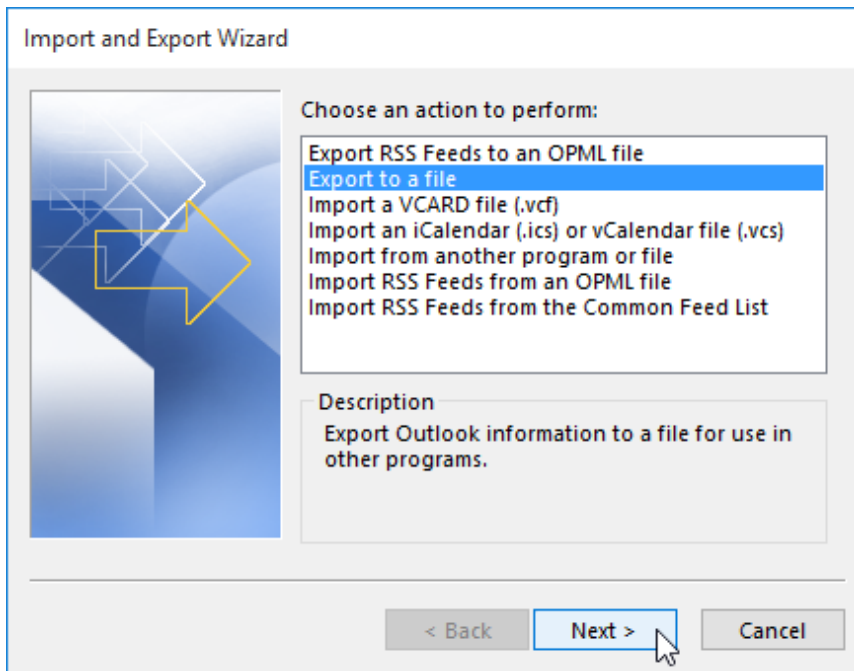
1. To begin, open Outlook 2016 and display the Mail workspace.
2. Ensure that your Inbox is selected within the Navigation pane:



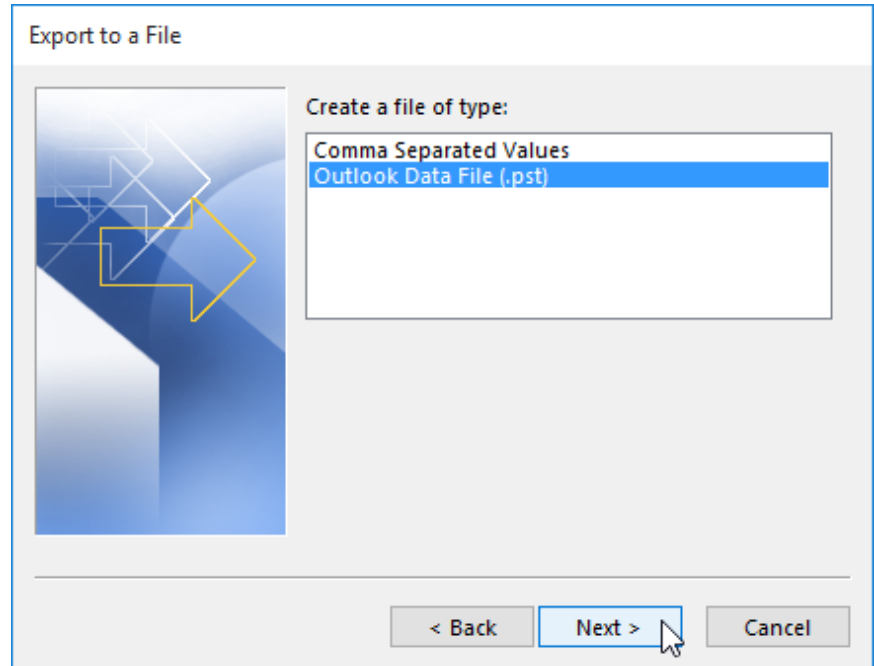
3. Click File → Open & Export → Import/Export:



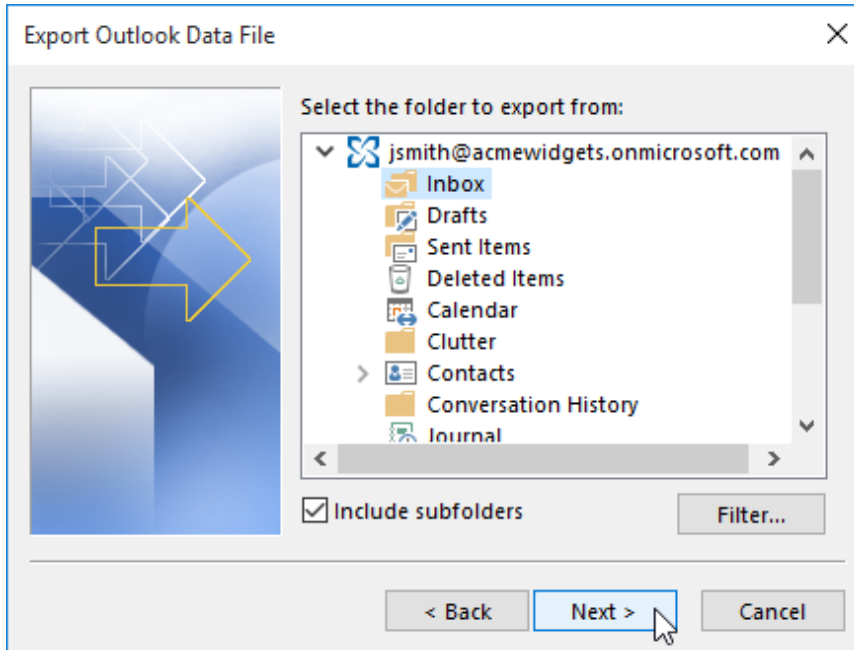
4. The Import and Export Wizard will now be displayed. Click the "Export to a file" option and click Next:



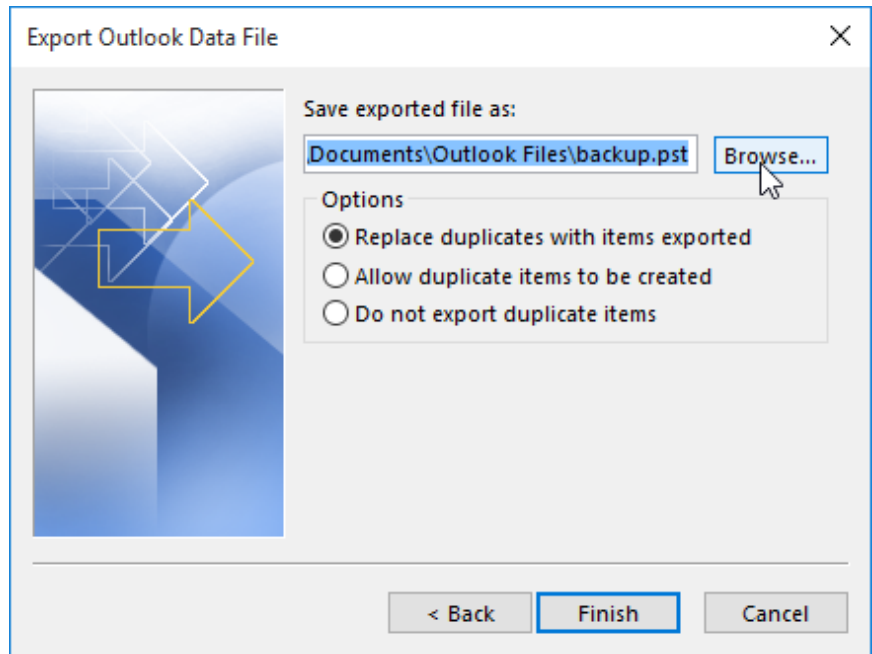
5. Here, you need to choose the file type that you would like to export to. Click "Outlook Data File (.pst)" and click Next:



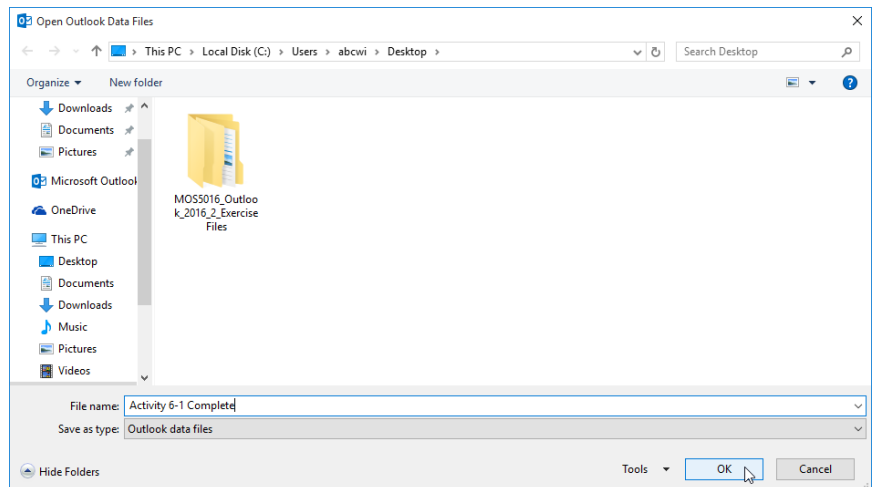
6. Now you are able to choose what folder(s) you would like to include in the data file that you are exporting. Ensure that the Inbox folder is selected and click Next:



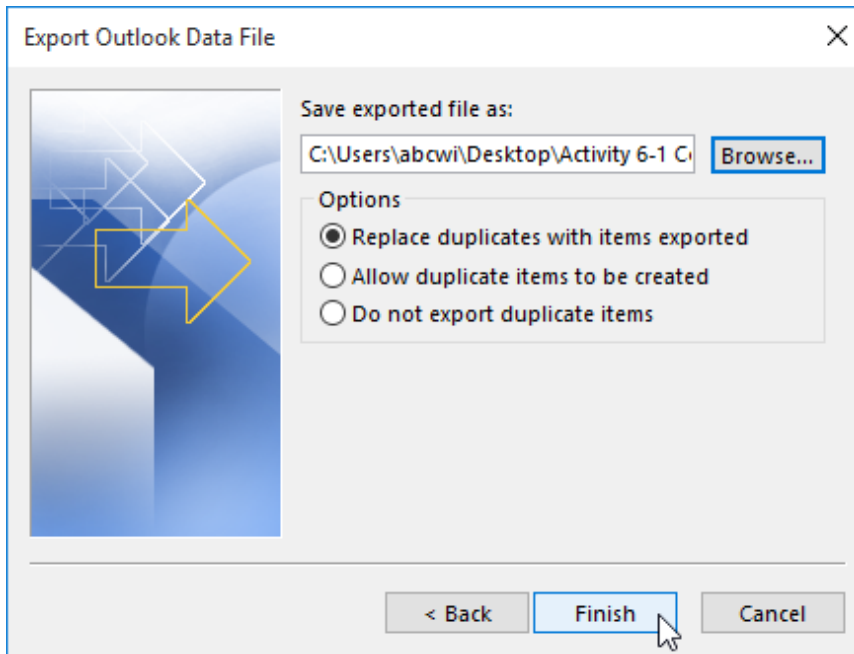
7. You have now reached the last stage of the wizard. At this point you need to choose where the data file will be saved to. Click Browse:



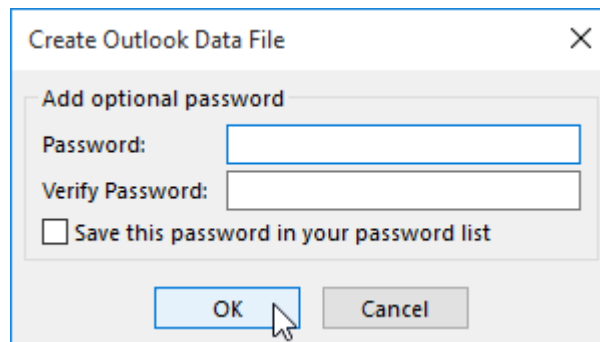
8. The Open Outlook Data Files dialog box will now be displayed. Use the controls in this dialog box to display your desktop. Type "Activity 6-1 Complete" into the "File name" text box and click OK:



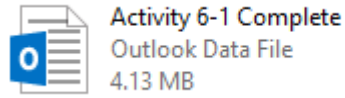
9. The new file name and location will now be displayed in the “Save exported file as” text box. Click Finish:



10. A dialog box will now be shown that asks you add an optional password. Typically you would do this if your information is sensitive, but it is not required. For this example leave the password fields blank and click OK to skip this step:



- 11.** Your Inbox folder will now have been backed up into an Outlook data file that has been created on your desktop:



- 12.** Close Microsoft Outlook 2016 to complete this exercise.

TOPIC B: Change Data File Settings

Once you have created an Outlook data file, you can still customize certain aspects of it, including the display name and password. Both of these features will be covered during this topic.

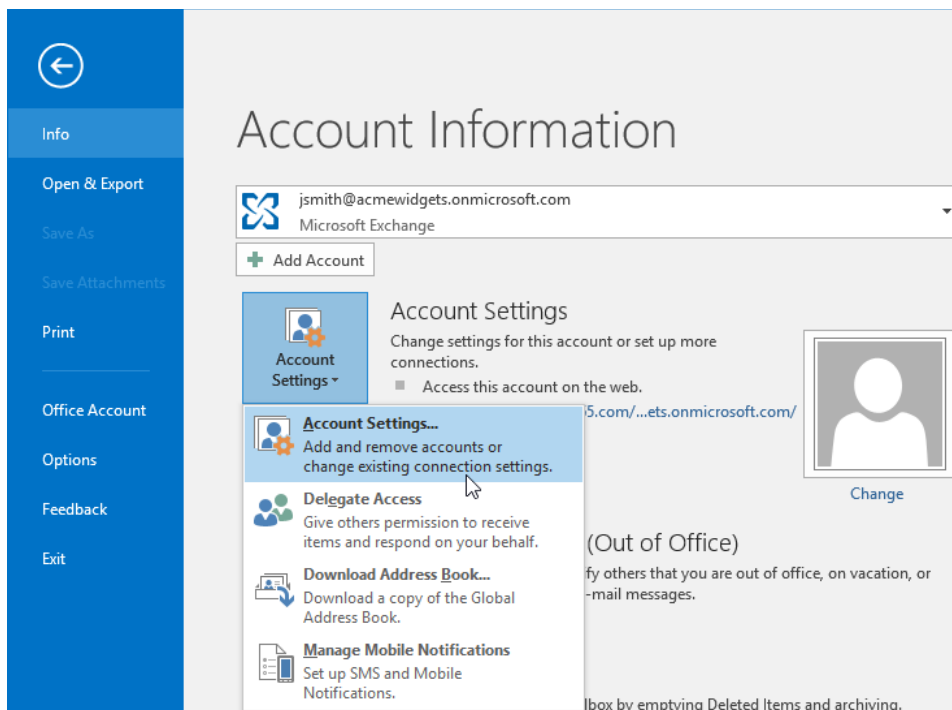
Topic Objectives

In this topic, you will learn:

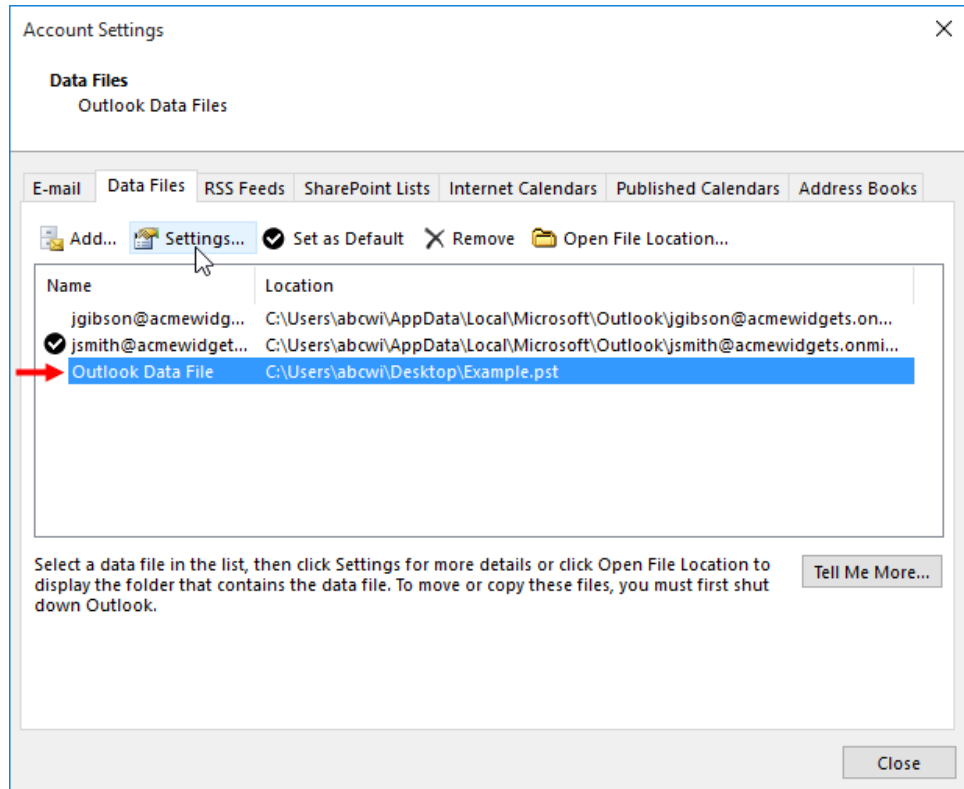
- About data file settings
- How to add a new e-mail account

DATA FILE SETTINGS

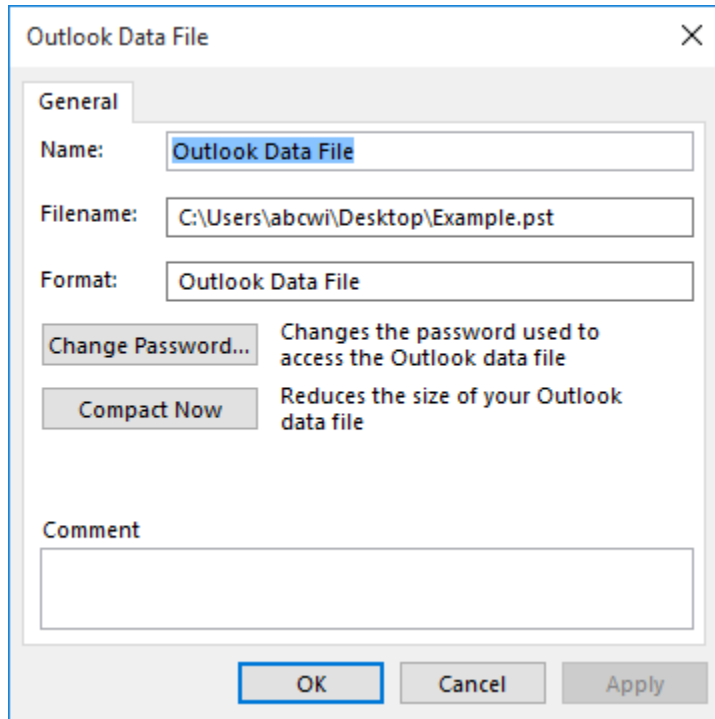
To view and modify the settings for a data file, first open that data file in Outlook using the File → Open & Export → Open Outlook Data File command sequence. Next, click File → Info → Account Settings → Account Settings:



Inside the Account Settings dialog box, display the Data Files tab. Select the data file whose properties you would like to view and then click the Settings button:



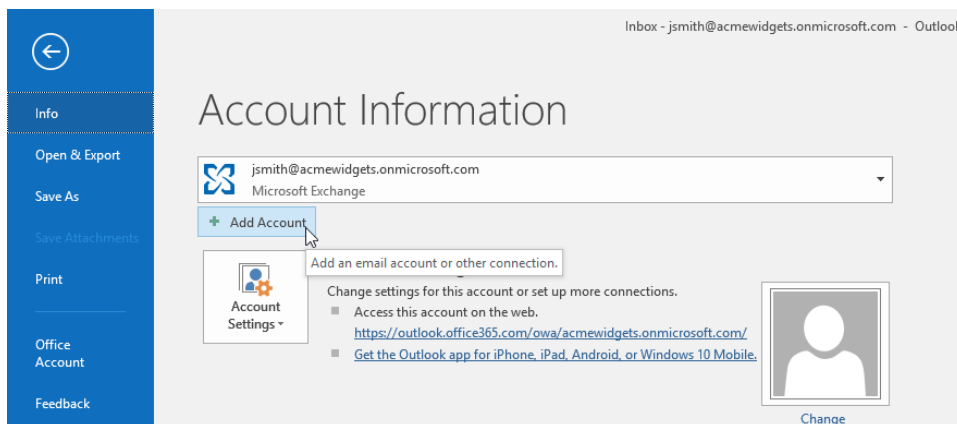
This action will display the Outlook Data File dialog box. The settings in this dialog box can be used to change the display name, change the password (or apply one), compact the file to reduce its file size, and add comments:



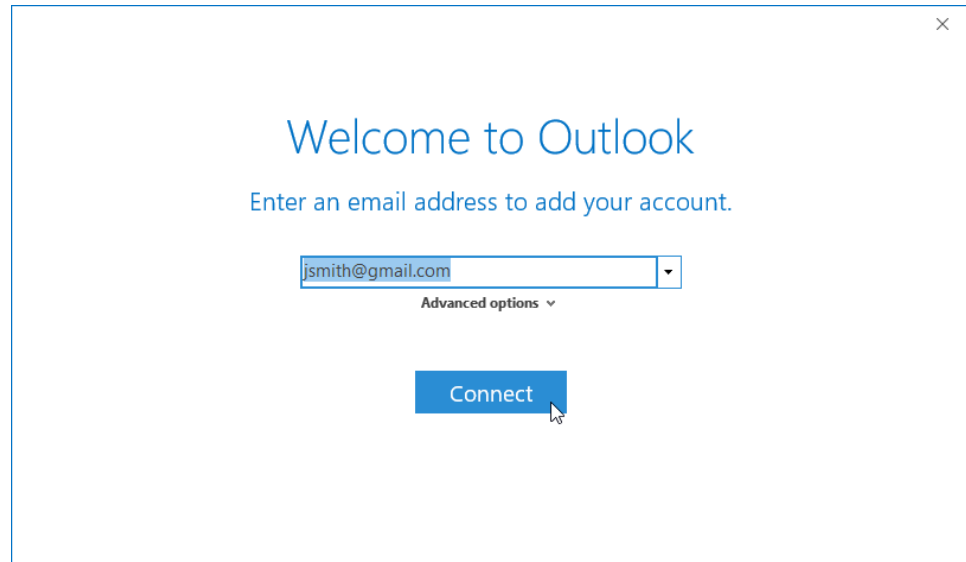
Click OK to save your changes.

ADD A NEW E-MAIL ACCOUNT

To add a new e-mail account to Outlook, click File → Info → Add Account:



Then, the Welcome to Outlook dialog will open. Enter your e-mail address in the provided field and click Connect:



Then, enter your password and click Connect:



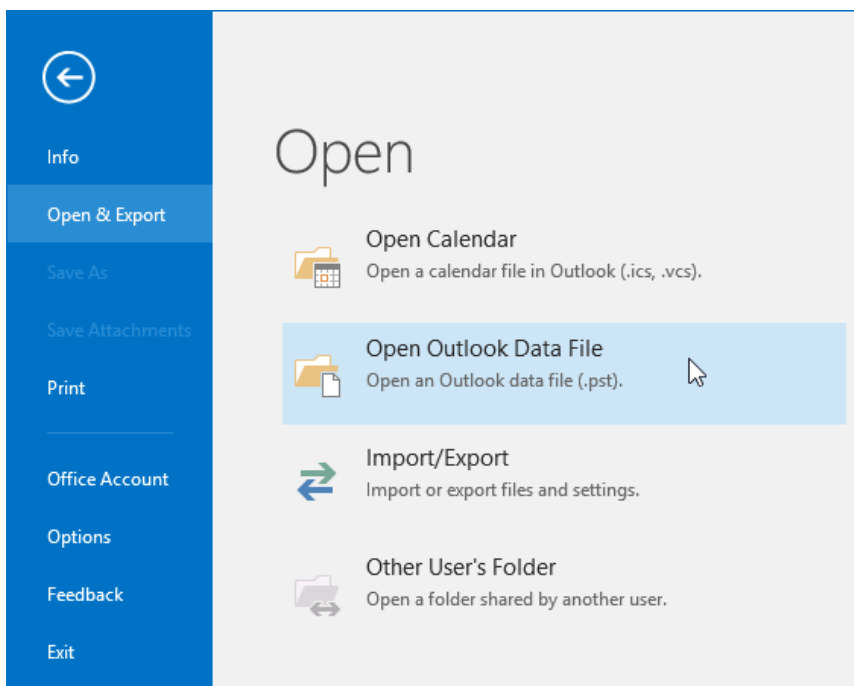
The account will then be added to Outlook. It will be accessible from the Navigation pane as a separate set of folders.

ACTIVITY 6-2

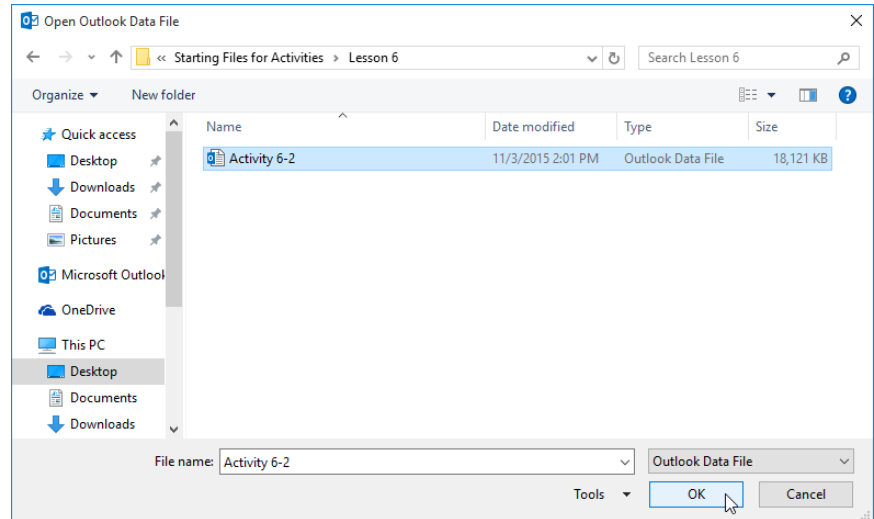
Changing Data File Settings

While you have recently backed up your Inbox folder by saving it as an Outlook data file, you would like to make a few minor changes to the details of that file.

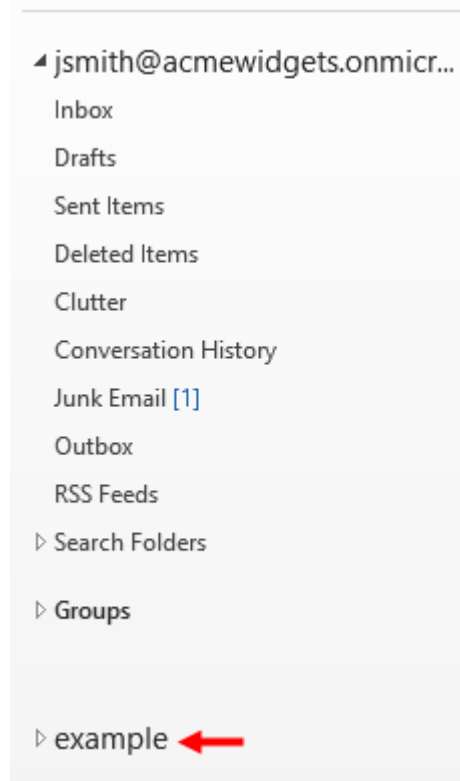
1. To begin, open Outlook 2016. Open the Activity 6-2 data file by clicking File → Open & Export → Open Outlook Data File:



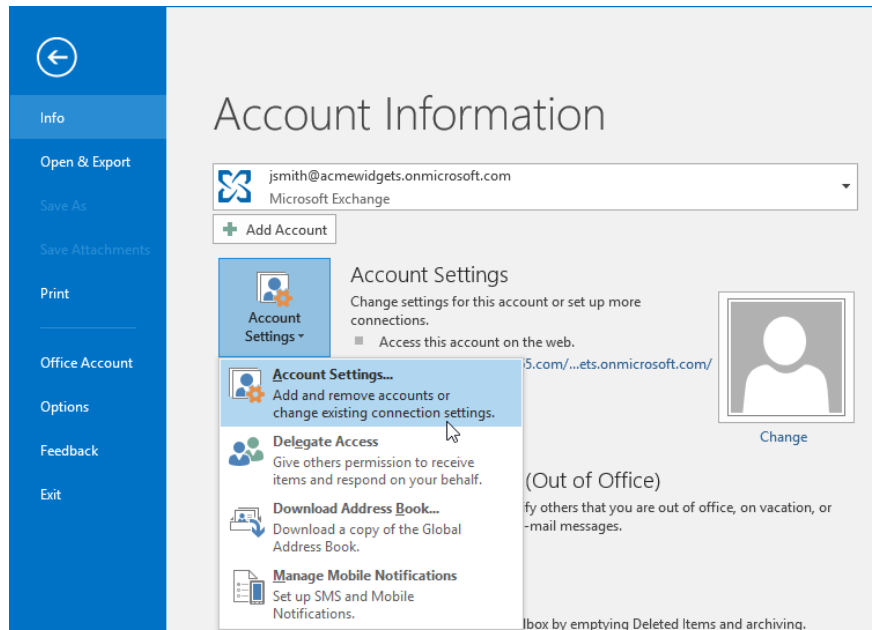
2. The Open Outlook Data File dialog box will now be displayed. Inside your Exercise Files folder, find and select the Activity 6-2.pst file. Click OK:



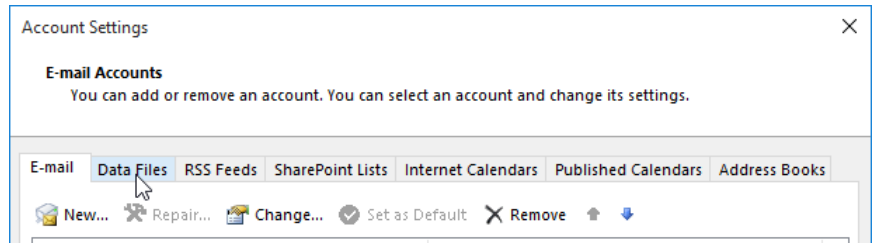
3. The selected Outlook data file will now be open within the Navigation pane:



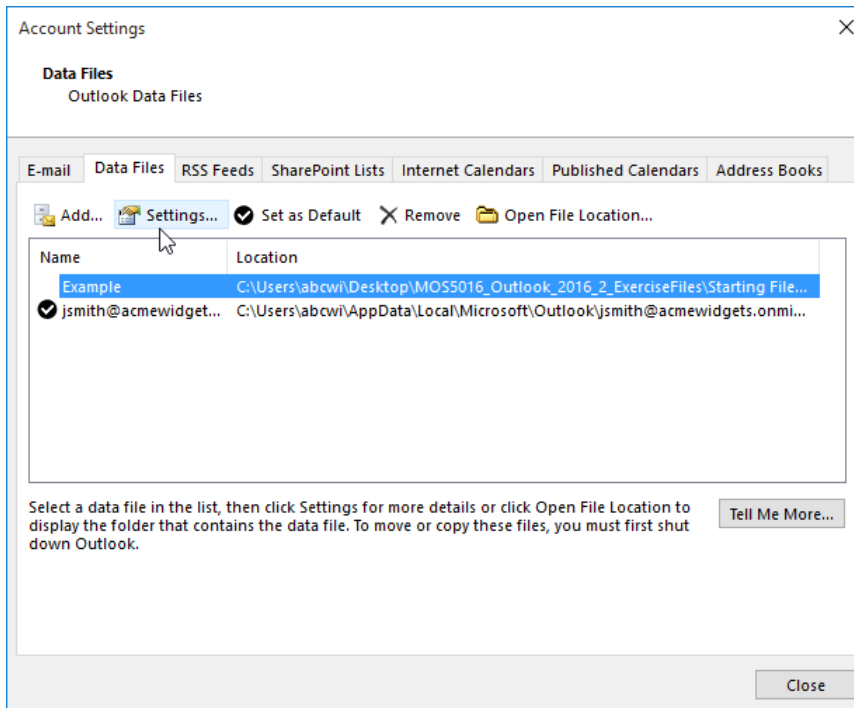
4. Open the Account Settings dialog box by clicking File → Info → Account Settings → Account Settings:



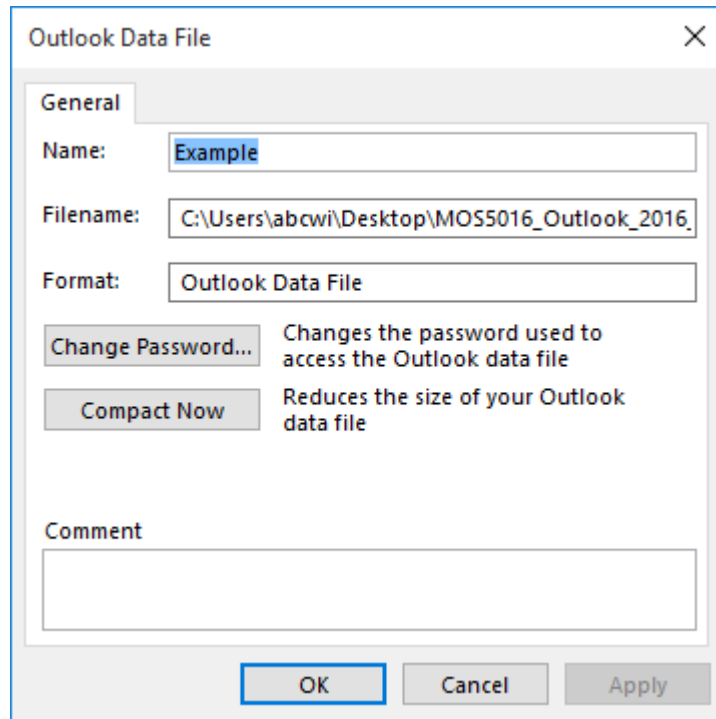
5. The Account Settings dialog will now be shown. Click the Data Files tab:



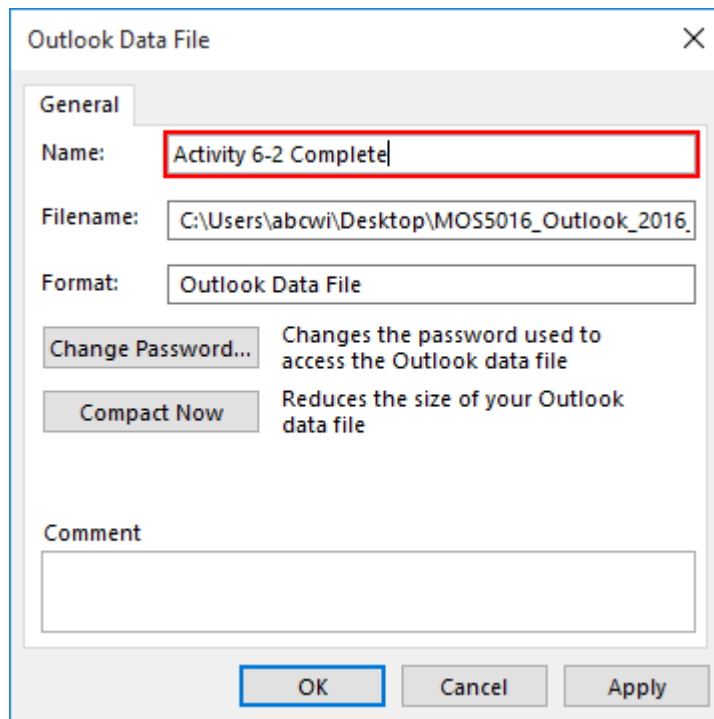
6. All of the currently open Outlook data files will be listed. Click to select the Example data file and then click Settings:



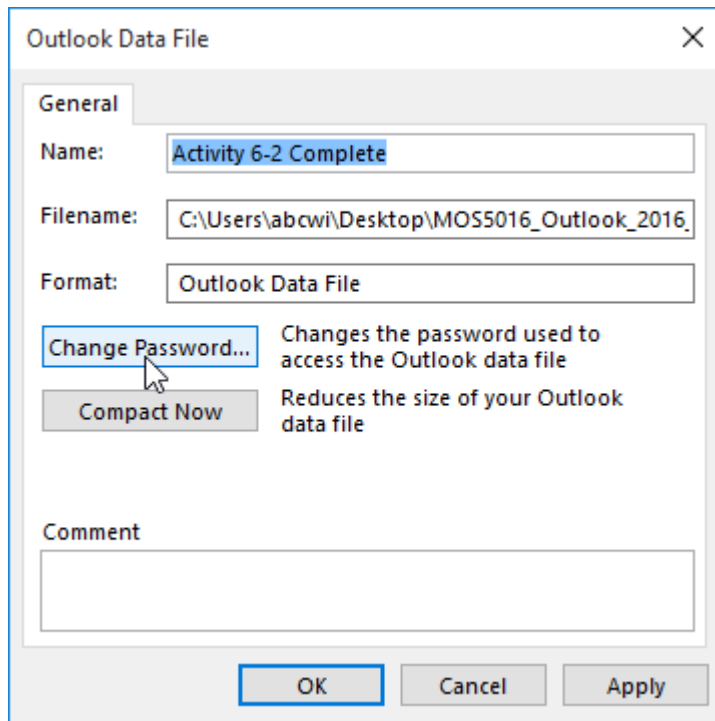
7. The Outlook Data File dialog box will now be displayed with the settings for the data file that you just opened:



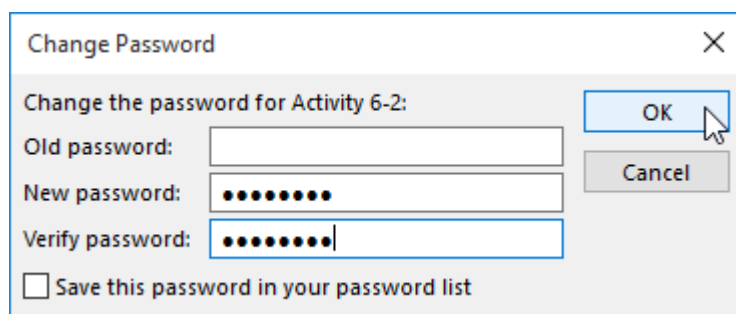
8. Change the display name by replacing the text inside the Name text box with "Activity 6-2 Complete."



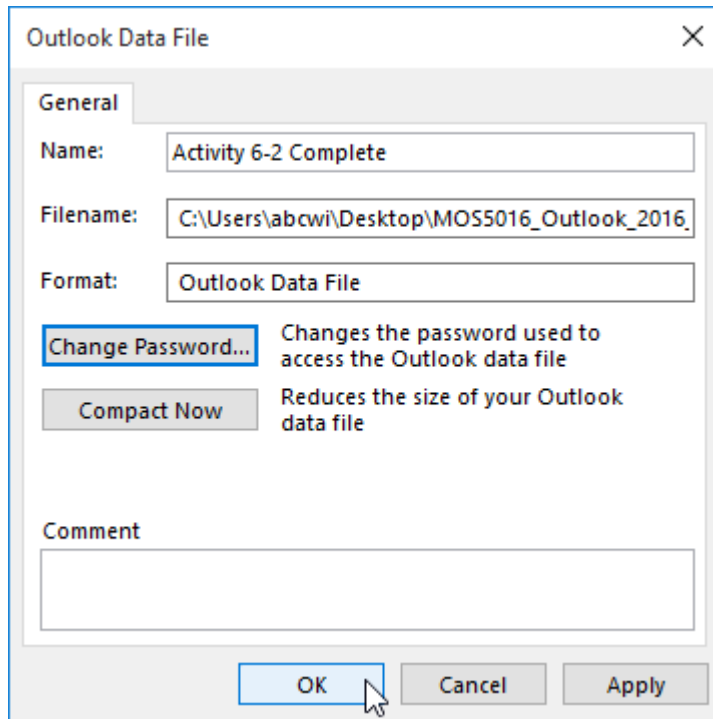
9. Now click the Change Password button:



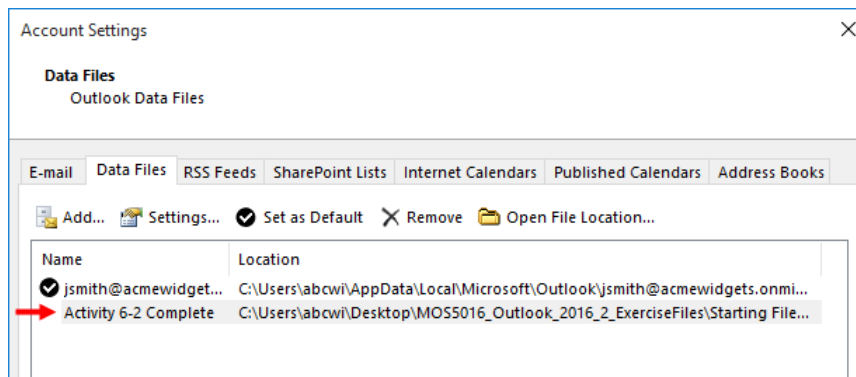
10. The Change Password dialog box will now be displayed. As there is no password currently applied to this data file, leave the “Old password” text box blank. Next, type “password” into the two remaining fields and click OK:



11. With the new password now applied, click OK to apply the new settings and close this dialog box:



12. Back at the Account Settings dialog box, you will now see the new name you applied:



13. Click Close to close this dialog box and then close Outlook 2016 to complete this exercise.

Summary

Over the course of this lesson, you learned how you can use Outlook data files to back up your data. Additionally, you learned how to modify the settings of any data file that you currently have open in Outlook 2016 and how to add a new e-mail account.

REVIEW QUESTIONS

1. What is the file extension for an Outlook data file?
2. What is the command sequence to display the Import and Export Wizard?
3. What do you do if you do not want a password applied to a data file that you are exporting?
4. What dialog box do you first need to open before accessing data file settings?
5. What settings can be modified for an Outlook data file?

LESSON 7: MANAGING E-MAIL SECURITY

Lesson Objectives

In this lesson you will learn how to:

- Configure e-mail message security settings

TOPIC A: Configure E-mail Message Security Settings

It is important to remember that e-mail is inherently insecure. Due to its design and protocols, e-mail is not protected while in transit from one e-mail address to another. However, Outlook does provide support for encryption, digital signatures, and other features that can help protect your data. During this topic, you will learn about some of the e-mail message security settings that Outlook has to offer.

Topic Objectives

In this topic, you will learn:

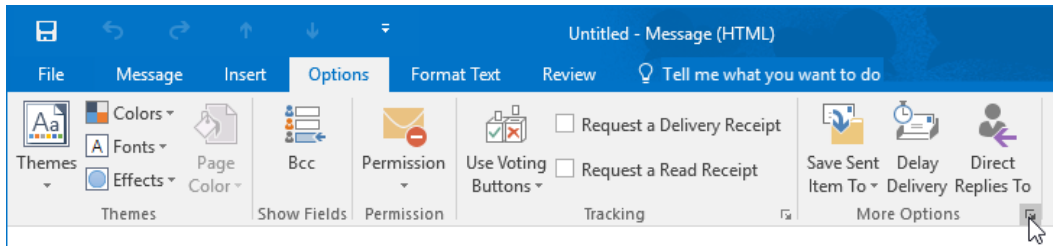
- About encryption
- About digital signatures
- About digital ID's
- About Information Rights Management (IRM)

ENCRYPTION

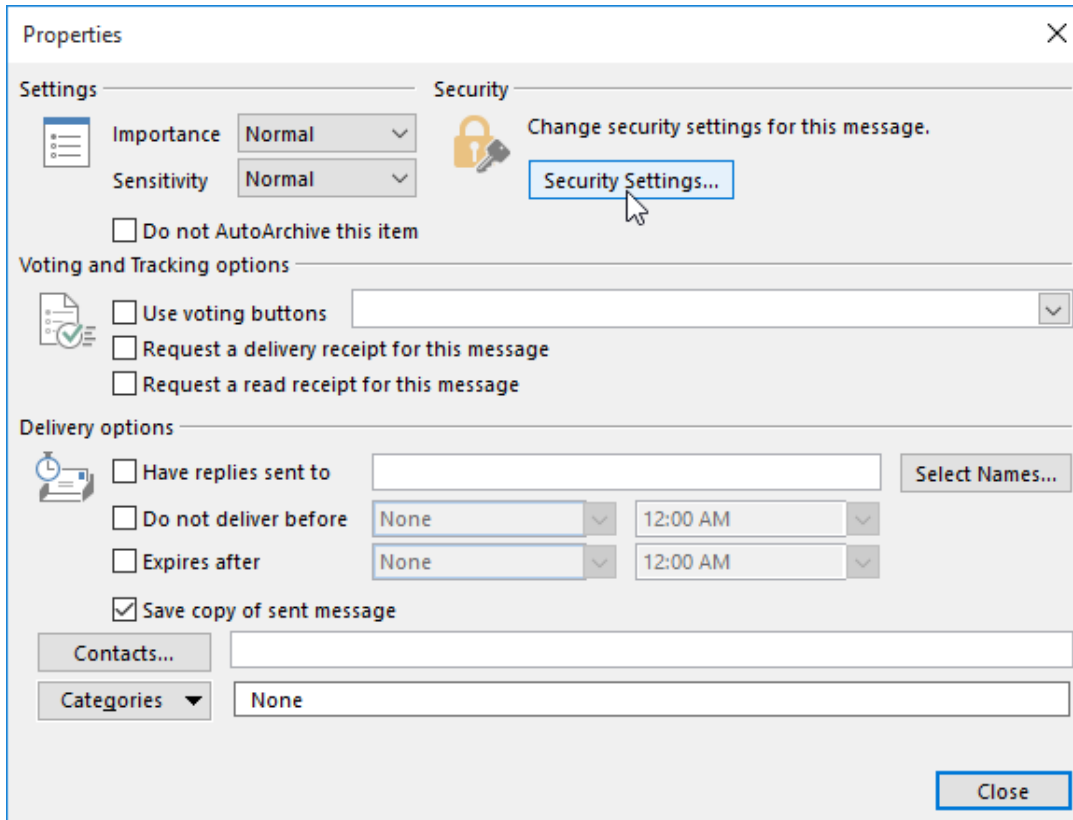
Encryption is the process of changing a file or object so that it is unreadable unless an encryption key is provided. This process is powered by complex algorithms that vary in strength and are used to both encrypt and decrypt items.

Outlook 2016 natively supports basic encryption that can be used to encrypt both the message that you send and any attachments that have been included. The type of encryption that it uses is called asymmetric cryptography (also known as public-key cryptography); this means that two separate keys are used to encrypt and decrypt your messages. The first key is called a **public key** and it is used to actually encrypt your message. The second key is the **private key**, which your recipient must have in order to actually read the encrypted message that you are sending. This whole system relies on a digital ID, which acts as a type of identification.

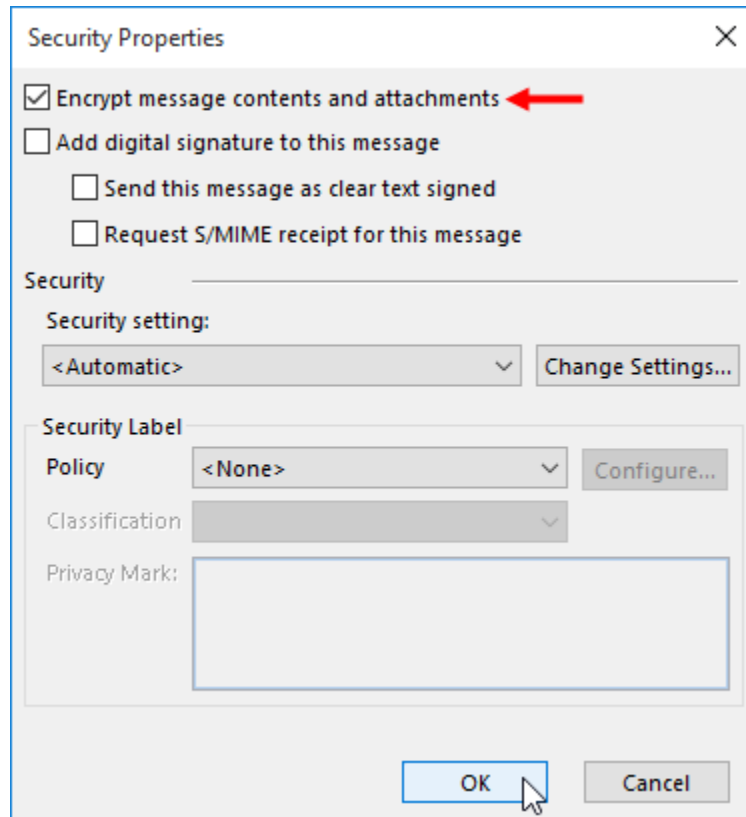
To encrypt a single message, open it in the Message window and click the Message Options dialog box launcher button in the lower right-hand corner of the More Options group on the Options tab:



This action will display the Properties dialog box. Click the Security Settings button:



In the Security Properties dialog box, check the “Encrypt message contents and attachments” checkbox and click OK:



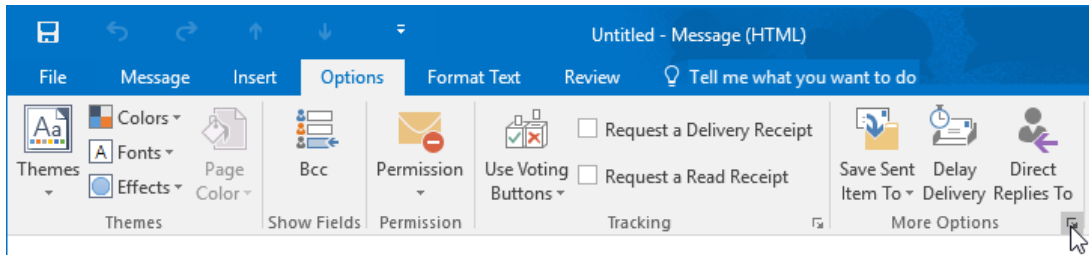
Close the Properties dialog box. At this point you can then continue to compose and send your message.

(Note that if you do not have a digital ID enabled, an error message will be displayed.)

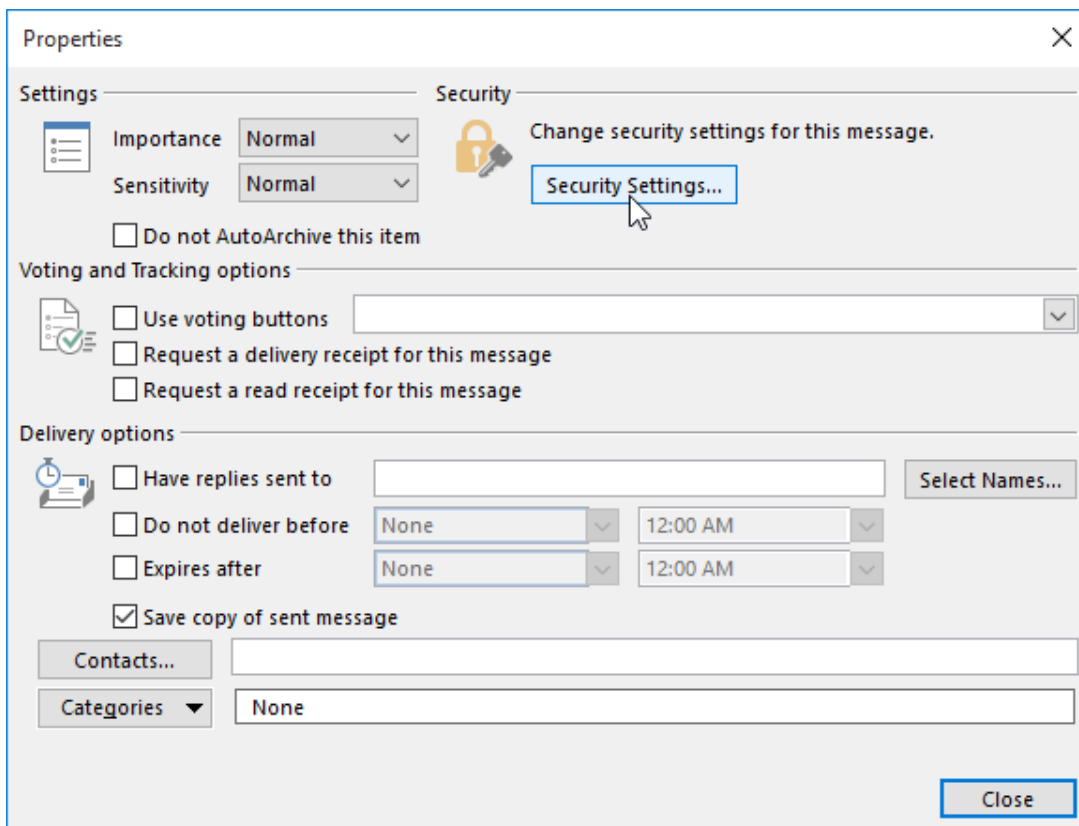
DIGITAL SIGNATURES

Digitally signing electronic files is like signing a check or a legal document: the signature confirms your identity. For electronic messages like e-mail, it also provides reassurance to the recipient that the message really came from you. Additionally, digital signatures will become invalid if the information was modified in any way during transit, notifying you of any tampering.

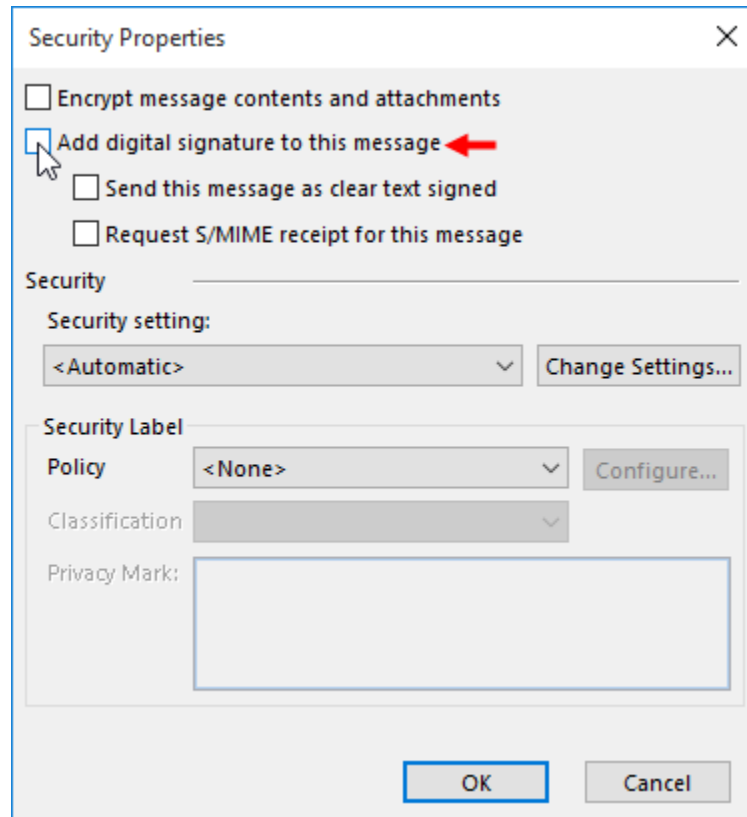
To digitally sign a message that you are sending, click the Message Options dialog box launcher button in the lower right-hand corner of the More Options group on the Options tab:



This action will display the Properties dialog box. Click the Security Settings button:



Inside the Security Properties dialog box, check the “Add digital signature to this message” checkbox:



You can then choose to send this message as clear text signed if recipients don't use an e-mail client that supports S/MIME security. Additionally, you can choose to be notified when the message is received without being tampered with by requesting an S/MIME receipt. As the name implies, this feature requires that the receiver uses an e-mail client that supports the S/MIME security standard. (You will learn more about this security standard shortly).

Click OK to apply your new settings and close the Properties dialog box. From there you can continue to compose and send your message, which is now digitally signed. (Note that if you do not have a digital ID enabled, an error message may be displayed.)

Secure/Multipurpose Internet Mail Extensions

Secure/Multipurpose Internet Mail Extensions (S/MIME) is a standard e-mail protocol that is used to provide e-mail encryption as well as digital signatures. It does this using your digital ID.

DIGITAL ID

A **digital ID**, also known as a **digital certificate**, is used to identify who you are. Many applications, including Outlook, use digital ID's to help prove your identity to the recipient of a message or file. Typically a digital ID is comprised of your public key, name and e-mail address, certification authority that issued your digital ID, expiration date, and few other items.

INFORMATION RIGHTS MANAGEMENT

Information Rights Management (IRM) is used by both regular users and administrators to control access to documents and other files. By doing this it can prevent sensitive information from being forwarded, copied, or printed by unauthorized users. Additionally, once permissions for a file have been restricted, those restrictions will apply to a file no matter where it is stored as these permissions are stored within the files themselves.

When working with Outlook 2016, IRM can be used to control how recipients can interact with any messages and attachments that you send them. This includes preventing recipients from being able to forward a message, print a message, and/or copy its contents.

Windows Rights Management Services

In order to use IRM in conjunction with Outlook 2016, you need to have Windows Rights Management Services (RMS) installed on your computer. While Windows Vista, Windows 7, Windows 8, and Windows 10 all include this functionality by default, you will need to download and install RMS if you use Windows XP.

Summary

During this lesson you learned about some of the security features that Outlook has to offer. You should now be comfortable with the idea of encryption and how digital signatures work to protect your messages. Additionally, you should now be familiar with the concept of digital ID's and Information Rights Management.

REVIEW QUESTIONS

1. **If you encrypt a message that has an attachment, is the attachment encrypted as well?**
2. **What are the two types of encryption keys that are required in order for asymmetric cryptography to work?**
3. **What do digital signatures do?**
4. **What type of organization provides digital ID's?**
5. **What is Information Rights Management used for?**

LESSON LABS

Lesson 1

LESSON LAB 1-1

- Objective** To understand how to configure advanced message options.
- Briefing** You need to send a progress update to one of the executives in your company. While you already have the text of the message entered, you would like to add a chart, as well as change the important and sensitivity levels.
- Task** In the space that has been provided in the Sample Data message, insert a line chart. Use the default data that appears in the Excel worksheet; however, remove the data from the fifth row. Change "Series" to "Product" in each instance. Change "Category 1" to "April," "Category 2" to "May," and "Category 3" to "June."
- Change the sensitivity level to Confidential and the importance level to High.
- Hints** When you are done, save your message as Lesson Lab 1-1 Complete.

Sample Data



Lesson Lab 1-1
Outlook Item
19.0 KB

Lesson 2

LESSON LAB 2-1

Objective	To understand how to sort, filter, and organize messages.
Briefing	Your mailbox is starting to grow and you would like to make sure that important messages are brought to your attention.
Task	<p>Sort the messages in your inbox by the date received, then by attachment. Ensure that the date received criteria is sorted in descending order while the attachment criteria is in ascending order.</p> <p>Add conditional formatting that will help identify any message that you receive from your instructor or supervisor as important.</p>
Hints	When adding the conditional formatting, try having the messages sent by your instructor or supervisor marked with bold red text to help them stand out.
Follow-Up Questions	Try applying a filter that will only display messages from your instructor or supervisor.

LESSON LAB 2-2

Objective	To understand how to search your messages and manage your inbox.
Briefing	You are continuing to organize your inbox. As you frequently communicate with your supervisor, you would like to create a search folder that only lists e-mails from them. Additionally, you need to archive your inbox.
Task	<p>Create a search folder that will display only e-mails sent to you by your instructor or your supervisor.</p> <p>Archive your inbox so that items older than three months are archived.</p>
Hints	It may be a good idea to leave the default archive file location unchanged so that you don't accidentally delete it.
Follow-Up Questions	Add your instructor or supervisor's e-mail address to the Safe Senders list.

Lesson 3

LESSON LAB 3-1

Objective	To understand how to manage advanced calendar and availability options.
Briefing	You would like to make sure that your calendar and availability options are configured properly.
Task	Ensure that the work time, work week, and time zone options correspond to your schedule and location. Make sure that the Free/Busy permission level for your calendar is set to “Free/Busy time.”
Hints	Remember that you can check the Free/Busy information settings for your calendar by clicking the Free/Busy Options button in the Calendar category of the Outlook Options dialog box.
Follow-Up Questions	If you have not already done so, add holidays celebrated by your country to your calendar.

LESSON LAB 3-2

Objective	To understand how to work with calendar groups and manage meeting responses.
Briefing	You are going to be working closely with a colleague, so you would like to create a calendar group to facilitate planning.
Task	<p>Pair up with another student. Create a calendar group that includes your partner's calendar.</p> <p>Create a meeting request for 1:00 PM tomorrow and send it to your partner. Once they have responded, use the Tracking command to view the information for this meeting.</p>
Follow-Up Questions	Have your partner send you a meeting request for tomorrow at 2:00 PM, but decline the request.

Lesson 4

LESSON LAB 4-1

Objective	To understand how to edit electronic business cards and manage contacts.
Briefing	You would like to modify your colleague's electronic business card to include only the most important information. Additionally, you want to share a contact group that includes the other members of your team with your partner.
Task	<p>Pair up with another student. Ensure that your partner is an Outlook contact. Modify their electronic business card to include only their name, job title, phone number, and e-mail address.</p> <p>Create a contact group that includes at least two contacts. Forward this contact group to your partner.</p>
Hints	You can forward a contact group by clicking Home → Forward Contact → As an Outlook Contact.

LESSON LAB 4-2

Objective	To understand advanced contact options and how to export contacts.
Briefing	A colleague of yours needs the information from one of your contacts. Additionally, you would like to back up your Contacts folder.
Task	<p>Pair up with another student. Forward one contact from your contacts list to your partner as a business card.</p> <p>Then, export your contacts folder as an Outlook data file (.pst) to your desktop.</p>
Hints	You can access the Import and Export Wizard by clicking File → Open & Export → Import/Export.

Lesson 5

LESSON LAB 5-1

Objective	To understand how to delegate access to mail folders and share your calendar with others.
Briefing	Due to unforeseen circumstances, you will be unable to attend work for the next week. To ensure that your obligations are taken care of, you would like to share your calendar with a colleague and delegate access to your inbox to them.
Task	Pair up with another student. Delegate access to your inbox to this person. Ensure that they have only read permissions. Then, share your calendar with your partner using e-mail.
Hints	To delegate access to your inbox, click File → Info → Account Settings → Delegate Access.

Lesson 6

LESSON LAB 6-1

Objective	To understand how to back up Outlook items and manage Outlook data files.
Briefing	As your inbox contains lots of important information, you would like to back it up to protect it from data loss.
Task	Backup your Inbox folder as an Outlook data file (.pst) using a password of your choice. To ensure that it was backed up properly, open this data file. Change the display name to Lesson Lab 6-1.
Hints	To open an Outlook data file, click File → Open & Export → Open Outlook Data File.
Follow-Up Questions	Change the password for your Outlook data file to “password.”

COURSE WRAP-UP

Post-Course Assessment

1. **What does Bcc stand for?**
 - A. Blind Carbon Copy
 - B. Backup Carbon Copy
 - C. Business Credit Card
 - D. Business Communication Cards

2. **What is the default junk e-mail filter setting?**
 - A. No Automatic Filtering
 - B. Low
 - C. High
 - D. Safe Senders list only

3. **What happens if your mailbox exceeds its soft lower limit?**
 - A. You will stop receiving e-mail
 - B. Old items in your mailbox will be deleted
 - C. You won't be able to send messages
 - D. Your account will be frozen

4. **Where can you quickly view the size of your mailbox?**
 - A. File → Info
 - B. Home → Print
 - C. File → Open
 - D. File → Office Account

5. **What is a calendar group?**
 - A. A collection of user's calendars
 - B. A type of meeting
 - C. A type of appointment
 - D. A group of users who can see your calendar

6. **Which of the following is a format that you can use to forward a contact?**
 - A. Business card
 - B. Outlook contact
 - C. Internet Format (vCard)
 - D. All of the above

- 7. The three response options that are available when you receive a task request are Accept, Decline, and _____.**
- A. Tentative Accept
 - B. Assign Task
 - C. Tentative Decline
 - D. Busy
- 8. Which of the following is a permission role?**
- A. Nonediting Author
 - B. Designer
 - C. Junior Editor
 - D. All of the above
- 9. What is the file extension for an Outlook data file?**
- A. .txt
 - B. .psd
 - C. .pst
 - D. .exe
- 10. What are the two separate keys that are used to encrypt and decrypt your messages?**
- A. Detail Key and Simple Key
 - B. 256 Bit Key and 128 Bit Key
 - C. Public Key and Private Key
 - D. Encrypt Key and Decrypt Key

Course Summary

Congratulations on completing the second part of Microsoft Outlook 2016 training. During this course, you learned how to:

- Insert advanced characters and objects into messages
- Modify message settings, properties, and options
- Use automatic replies
- Sort, filter, organize, and search messages
- Manage junk mail
- Manage your mailbox
- Manage advanced calendar and availability options
- Create calendar groups
- Manage meeting responses
- Assign and manage tasks
- Edit an electronic business card
- Manage advanced contact options
- Forward and export contacts
- Delegate access to mail folders
- Share your calendar and your contacts
- Back up Outlook items
- Change data file settings
- Manage e-mail security

You should now feel comfortable changing advanced message options and using advanced message management tools. Additionally, you should be familiar with many of the management features that are available in the Calendar and People workspaces. You should now understand how Outlook can be used to delegate tasks to other people, share your workspaces with others, and record activity in the journal. Finally, you should be comfortable backing up the items in your mailbox and have an understanding of how e-mail security can be managed.

Answer Keys

LESSON 1 REVIEW QUESTIONS

- 1. What is the easiest way to enter a hyperlink into the body of a new message?**

The easiest way to enter a hyperlink into the body of a new message is to simply type the URL and add a space at the end or press the Enter key.

- 2. What is the combo chart type?**

The combo chart type will combine the features of the bar chart and the line chart. This could be useful if you are comparing values in different categories.

- 3. What are the four sensitivity levels that can be assigned to a message?**

The four sensitivity levels that can be assigned to a message are normal, personal, private, and confidential.

- 4. What is the command sequence to toggle the Bcc field in a new message?**

To toggle the Bcc field in a new message, click Options → Bcc.

- 5. Automatic replies can be different based on what?**

Automatic replies can be different based on if the message that is received is from an internal e-mail address or one from outside the organization.

LESSON 2 REVIEW QUESTIONS

- 1. What dialog box do you first need to open in order to display either the Sort dialog box or the Filter dialog box?**

In order to display either the Sort dialog box or the Filter dialog box, you first need to open the Advanced View Settings dialog box.

- 2. What does conditional formatting do?**

Conditional formatting will apply formatting to objects based on a previously set list of conditions.

- 3. Where can you find the options that configure how search works in Outlook 2016?**

The options to configure how search works in Outlook 2016 are found in the Outlook Options dialog box, inside the Search category.

- 4. What is the default junk e-mail filter level?**

The default junk e-mail filter level is No Automatic Filtering.

- 5. What is the easiest way to view the size of your mailbox?**

The easiest way to view the size of your mailbox is to click File → Info, and then examine the Mailbox Settings section.

LESSON 3 REVIEW QUESTIONS

1. How do you open the Outlook Options dialog box?

To open the Outlook Options dialog box, click File → Options.

2. Where can you toggle the weather information that appears on your calendar?

You can toggle the weather information that appears on your calendar, within the Calendar category of the Outlook Options dialog box.

3. What is the command sequence to create a new calendar group?

The command sequence to create a new calendar group is Home → Calendar Group → Create New Calendar Group.

4. How do you view a list of meeting attendees and their attendance statuses?

To view a list of attendees and their attendance statuses, click Meeting → Tracking.

5. How do you view and/or add more details to a task?

To view and/or add more details to a task, click Task → Details with the Task window open.

LESSON 4 REVIEW QUESTIONS

1. How do you view your contacts as business cards?

To view your contacts as business cards, open the People workspace and click View → Business Card:

2. What is a contact group?

A contact group is a single contact that represents multiple people in a list. This makes sending group e-mails easy and efficient.

3. How do you delete a contact group using the ribbon?

To delete a contact group using the ribbon, click to select the contact group listing in the People workspace and then click Home → Delete.

4. What are the three possible options that you can use to forward a contact?

These three formats are “As a Business Card,” “In Internet Format (vCard),” and “As an Outlook Contact.”

5. What is the command sequence to launch the Import and Export Wizard?

The command sequence to launch the Import and Export Wizard is File → Open & Export → Import/Export.

LESSON 5 REVIEW QUESTIONS

1. Who are delegates?

Delegates are any users who have access to another user's mail folders.

2. What is the command sequence to start setting the permission roles for a selected folder or mailbox?

This command sequence is Folder → Folder Permissions

3. What are the three options available to you that you can use to share your calendar?

The three options that can be used to share your calendar are E-mail Calendar, Share Calendar, and Publish Online.

4. What are the three detail levels that are available when you are sharing your calendar with another person?

The three detail levels that are available when you are sharing your calendar with another person are "Availability only," "Limited details," and "Full details."

5. What is the command sequence to view any shared contacts that you have available?

The command sequence to view contacts that have been shared with you is Home → Open Shared Contacts (while in the People workspace).

LESSON 6 REVIEW QUESTIONS

1. What is the file extension for an Outlook data file?

The file extension for an Outlook data file is .pst.

2. What is the command sequence to display the Import and Export Wizard?

This command sequence is File → Open & Export → Import/Export.

3. What do you do if you do not want a password applied to a data file that you are exporting?

In this situation, you would leave the password fields in the Create Outlook Data File dialog box blank and click OK to continue.

4. What dialog box do you first need to open before accessing data file settings?

In order to access data file settings, you first need to open the Account Settings dialog box.

5. What settings can be modified for an Outlook data file?

The available data file settings include the ability to change the display name, change the password (or apply one), compact the file to reduce its file size, and add comments.

LESSON 7 REVIEW QUESTIONS

1. **If you encrypt a message that has an attachment, is the attachment encrypted as well?**

Yes. If you encrypt any message that includes an attachment that attachment will be encrypted as well.

2. **What are the two types of encryption keys that are required in order for asymmetric cryptography to work?**

The two types of encryption keys that are required in order for asymmetric cryptography to work are the private key and the public key.

3. **What do digital signatures do?**

Digital signatures confirm your identity to the message receiver and prove that the message was not tampered with during transit.

4. **What type of organization provides digital ID's?**

Certificate Authorities (CA's) provide digital ID's.

5. **What is Information Rights Management used for?**

Information Rights Management (IRM) is used by both regular users and administrators to control access to documents and other files.

Post-Course Assessment

1. What does Bcc stand for?

- A. Blind Carbon Copy
- B. Backup Carbon Copy
- C. Business Credit Card
- D. Business Communication Cards

Bcc stands for Blind Carbon Copy.

2. What is the default junk e-mail filter setting?

- A. No Automatic Filtering
- B. Low
- C. High
- D. Safe Senders list only

The default junk e-mail filter setting is No Automatic Filtering.

3. What happens if your mailbox exceeds its soft lower limit?

- A. You will stop receiving e-mail
- B. Old items in your mailbox will be deleted
- C. You won't be able to send messages
- D. Your account will be frozen

If your mailbox exceeds its soft lower limit, you won't be able to send messages; however, you will still receive mail.

4. Where can you quickly view the size of your mailbox?

- A. File → Info
- B. Home → Print
- C. File → Open
- D. File → Office Account

To quickly view the size of your mailbox, click File → Info and examine the Mailbox Settings section.

5. What is a calendar group?

- A. A collection of user's calendars
- B. A type of meeting
- C. A type of appointment
- D. A group of users who can see your calendar

A calendar group is a collection of user's calendars that are displayed within the Calendar workspace.

6. Which of the following is a format that you can use to forward a contact?

- A. Business card
- B. Outlook contact
- C. Internet Format (vCard)
- D. All of the above

All of these options are formats that you can forward a contact as.

7. The three response options that are available when you receive a task request are Accept, Decline, and _____.

- A. Tentative Accept
- B. Assign Task
- C. Tentative Decline
- D. Busy

The three response options that are available to you when you receive a task request are Accept, Decline, and Assign Task.

8. Which of the following is a permission role?

- A. Nonediting Author
- B. Designer
- C. Junior Editor
- D. All of the above

Nonediting Author is a permission role.

9. What is the file extension for an Outlook data file?

- A. .txt
- B. .psd
- C. .pst
- D. .exe

The file extension for an Outlook data file is .pst.

10. What are the two separate keys that are used to encrypt and decrypt your messages?

- A. Detail Key and Simple Key
- B. 256 Bit Key and 128 Bit Key
- C. Public Key and Private Key
- D. Encrypt Key and Decrypt Key

The two separate keys that are used to encrypt and decrypt your message are the Public Key and the Private Key.

APPENDICES

Keyboard Shortcut Quick Reference Sheet

Search	Go to the Search text box	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
	Go to Shortcuts view	Ctrl + 7
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

Message Formatting	Insert a hyperlink	Ctrl + K
	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 + ,
	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 contact group	Ctrl + Shift + L
	Create a new e-mail message	Ctrl + Shift + M
	Create a new task	Ctrl + Shift + K
	Create a new task request	Ctrl + Alt + Shift + U
	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

action

A component of a rule that will complete a task when conditions are met.

Address Book

A central repository for Outlook contacts.

appointments

An activity that does not require any attendee or resource management tools.

archiving

The process of moving items from your mailbox and storing them elsewhere with the primary goal of saving mailbox space.

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.

calendar group

A collection of user calendars that are displayed within the Calendar workspace.

color categories

Feature that is used to classify Outlook objects.

contacts

Anyone that you have communicated with using Outlook 2016. Can also be created manually.

contact group

A collection of contacts that items can be addressed to with one name.

digital ID

A form of identification that is used to identify the sender to a message recipient. Also known as a digital certificate.

digital signature

A security feature that confirms the identity of the sender and verifies that content has not been tampered with during transit.

electronic business cards

Used to easily share contact information with others.

encryption

The process of changing a file or object so that it is unreadable unless an encryption key is provided.

e-mail clients

Software applications that facilitate 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.

meetings

An activity and 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 selected text or right-clicking. Typically contains some of the most popular commands.

notes

Small digital objects that allow you to record pieces of information.

personal folders

A type of folder that is created and stored in an Outlook Data File (.pst). Typically stored on a local computer, separate from the mail account.

rules

Instructions that will complete an action if a preconfigured condition is met.

Search Folders

Virtual folders that link to items based on criteria that you have previously set.

spam

Unsolicited e-mail that targets a wide range of e-mail addresses. Often referred to as junk mail.

styles

A saved set of formatting options that are used to help keep 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.

WordArt

A tool that is used to stylize message text using various special effects.

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