Microsoft Outlook 365 Email, Calendar And Contacts

Evaluation Only
Sample Book

A Step-By-Step Training Guide And Workbook

Supports:
Outlook 2013
Outlook 2016

Jeff Hutchinson

eLearnLogic

Microsoft Outlook 365
Email, Calendar, And Contacts
Supports Outlook 2010, 2013, and 2016.

Outlook is a tool we use on a daily basis. Therefore, we want to take advantage of any time-saving tips and ways to improve efficiency. **Rules** and **Quicksteps** are a few techniques to accomplish tasks quicker, and using sending options can improve the quality of sending **Email**.

This **Step-By-Step Workbook** will provide a better understanding of the **Microsoft Outlook** interface, **TriPane** layout, different **Views**, and the **Ribbon System**. It will also teach skills needed to send **Emails** using special options such as **Delivery Receipt**, **Read Receipt**, **Voting**, **Importance**, **Sensitivity**, **Delay Delivery**, and replies sent to multiple recipients. Additionally, receiving **Email** options such as moving to folders automatically, **Quick Steps**, and **Rules** will also be covered. The manual will explain how to apply color-coding in **Calendars, Notification, Recurring Events,** as well as how to manage multiple **Calendars**. Students will also learn how **Contacts** can be used to store information for remembering important people, as well as the integration of **Email and Calendar**. This manual will also cover **Microsoft Exchange** features for those who are connected to an **Exchange** server. It will also review several less popular productivity features such as **Tasks** and **Notes**. Furthermore, in the **Appendix**, we have included many examples of creating **Rules**, **Configure/Setup Email Options, Import/Export, Mail Merge, Email Broadcast Techniques,** and the **Zero Email System**.

Copyright and Release Information

This document was updated on **6/25/2020** (Version 1) and is designed for **Outlook 365.** The icons have changed for **Outlook 2007, 2010, 2013, and 2016** but the commands are very similar. This guide is the sole property of Jeff Hutchinson and **eLearnLogic.** Any emailing, copying, duplication, or reproduction of this guide, must be approved by Jeff Hutchinson in writing. However, students who take a class or purchase the guide are free to use it for personal development and learning.
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About the Author

Jeff Hutchinson is a computer instructor teaching a variety of classes around the country. He has a BS degree from BYU in Computer-Aided Engineering and has worked in the Information Technology field supporting and maintaining computers for many years. He also previously owned a computer training and consulting firm in San Francisco, California. After selling his business in 2001, he has continued to work as an independent computer instructor/consultant around the country. Jeff Hutchinson lives in Utah and also provides training for Utah Valley University Community Education system, offering valuable computer skills for the general knowledge of students, career development, and career advancement. Understanding the technology and the needs of students has been the basis for developing this material. Jeff Hutchinson can be contacted at jeffhutch@elearnlogic.com or (801) 376-6687.

Design Strategy

This workbook is designed in conjunction with an Online-Instructor-Led course (for more information see: www.elearnlogic.com). Unlike other computer guides, students will not need to review lengthy procedures in order to understand a topic. All that is necessary are the brief statements and command paths located within the guide that demonstrate how a concept is used. There are many **Step-By-Step Practice Exercises** and more comprehensive **Student Projects** used to better understand a concept. Furthermore, students will find that this workbook guide is often used as a reference to help users understand concepts quickly. An index is also provided on the last page of the workbook to reference important topics as necessary. However, if more detail is needed for study, the Internet can be used to search a concept. Also, if student's skills are weak due to lack of use, they can refresh their knowledge quickly by visually scanning the concept needed and then testing them out using the application.

Manual Organization

The following are special formatting conventions:

- **Numbered Sections** on the left are the **Concepts** covered.
- **Italic Text** is used to highlight commands that will perform the **Concept** or procedure in completing the practice exercises.
- **Practice Exercises** are a **Step-by-Step** approach to demonstrate the **Concept.**
- **Student Projects** are a more comprehensive approach to demonstrate the **Concept.**
- **Dark, Grayed-Out Sections** are optional/advanced **Concepts.**
- **Bolded** items are important **Concepts,** terminology, or commands used.
- **Tip** - These are additional ideas about the Concept.

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Exercise Download

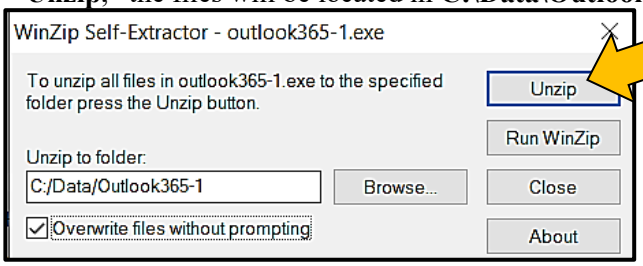
Exercises are posted on the website and can be downloaded to your computer.

Please do the following:

Open Internet Explorer. Or Google Chrome:

Type the web address: **elearnlogic.com/download/outlook365-1.exe**

You might get several security warnings, but answer yes and run through each one. When you click "**Unzip**," the files will be located in **C:\Data\Outlook365-1** folder.



If there are any questions or problems, please contact Jeff Hutchinson at:

JeffHutch@elearnlogic.com

Alternative Download and for **Mac** users, download the file and save it in the above folder.

elearnlogic.com/download/outlook365-1.zip

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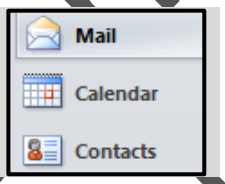
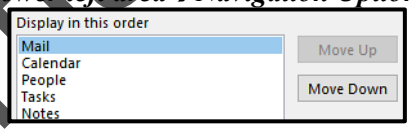
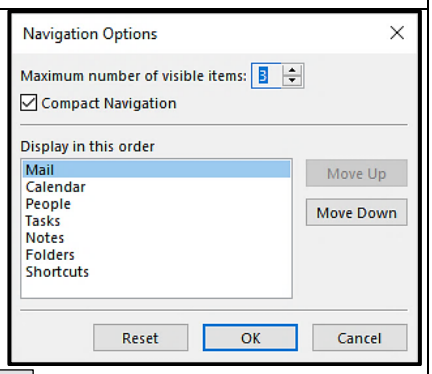
Chapter 1 - Interface and Navigation

Understanding the interface is key to using this program effectively.

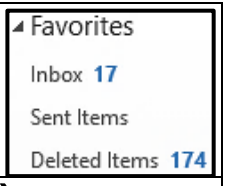
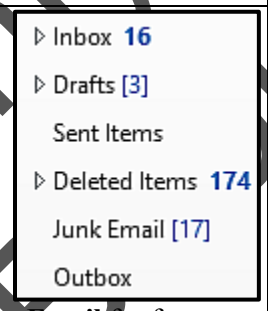
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Section 1: Core Concepts

Concept	**Explanation** / *Command string in italic.*
1.1 Major Modules	This will display (in the lower-left corner) the **Major Modules** for **Outlook** such as **Email**, **Calendar**, **People/Contacts**, **Tasks**, **Notes,** and **Folder List**. The interface has changed slightly in different **Outlook** versions, but the functionality is the same. **Outlook 2013**  **Outlook 2016**  **Outlook 365**  **Outlook 2010** - The **Module** name was **Contacts** but is now called **People Pane**. However, you will see the word **Contacts** on several screens.  **Ctrl** **1** **keys - Switch to the Mail View.** **Ctrl** **2** **keys - Switch to the Calendar View.** **Ctrl** **3** **keys - Switch to the People View.** **Ctrl** **4** **keys - Switch to the Tasks View.** **Ctrl** **5** **keys - Switch to the Notes View.** **Ctrl** **6** **keys - Switch to the Folder list in the Folder Pane.** **Ctrl** **7** **keys - Switch to the Shortcuts.** **Ctrl** **8** **keys - Open Journal.** **Ctrl** **Shift** **B** **keys - Open the Address Book.**
1.2 Navigation Options	You can view or **Hide** the **Major Modules** and Shortcuts. ***Click on the*** ··· ***to the right of shortcuts located in the lower-left corner).***
Practice Exercise 1 Change Order	1. ***Click the More Options*** ··· ***located in the lower left area → Navigation Options →***   2. ***Move the order of items:*** Move Up or Move Down. 3. ***The Maximum number of visible items: 4***

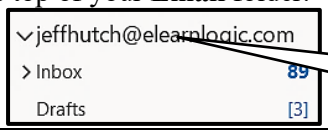
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1.3 Favorites	These are sometimes called **Shortcuts** and they allow access to major icons. They are located on the top left side above the **Email Folder Pane.** 
Practice Exercise 2 *Favorites*	**To add additional Favorites**: ***Right-click on the Outbox folder→ Add To Favorites***. **To remove Shortcuts:** ***Locate the Outbox in the Favorites area (upper left side of the screen)→Right-click on Outbox→ Remove From Favorites.***
1.4 Email Folders	The next group of **Folders** are the most commonly used. **Inbox Folder** - The **Inbox** is used to store **Email** received from an **Email** server usually located on the internet. **Drafts Folder** - When you exit or save a message, it is automatically placed in the **Drafts Folder.** This can be useful if you want to reread the message at a later time before you send it out. It can also be used to store prewritten or predefined emails that are sent out regularly. **Sent Items Folder -** After the **Email** is **Sent**, this **Folder** stores **Email** for future reference. It can be useful if a recipient claims they did not receive your Email. You can then verify it was **Sent**. **Delete Items Folder** - When you **Delete** an **Email**, it is stored here until you permanently **Delete** it. **Tip:** To permanently **Delete** the **Email**: ***Right-click on the "Delete Items" folder→ Empty Folder.*** **Tip:** It may be called the **Delete** folder. **Outbox Folder** - This is where **Email** is stored when it is in the process of sending. The Email waits there until the internet or **Exchange Server** can accept it. Then, a copy is redirected to the **Sent Items** folder. 
Practice Exercise 3 *Drafts*	1. ***Create a new message, address it, and enter a subject.*** 2. ***Click the Save Button***  ***or Close*** . ***Notice the number next to the Drafts folder increased.*** 3. ***Select the Drafts folder to open the saved message.*** 
Practice Exercise 4 *Sent Items*	***Send an Email to another student→Check the Sent Items folder after it is Sent.*** Sent Items
1.5 Open New Window	This will **Open a New Window** of an **Email Folder** or **Module** such as **Email,**  **Calendar, or**  **People** located on the left side of the screen. ***Right-click on any module located on the left side of the screen→Open New Window***
Practice Exercise 5	1. ***Right-click on the***  ***People icon (located in the lower left corner)→ Open New Window.*** 2. ***Right-click on the*** Sent Items ***Sent Items folder→***  ***Open New Window.***

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1.6 Outlook Today

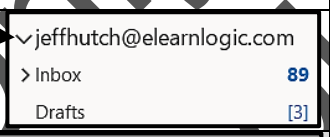
The **Outlook Today** page displays a summary of **Appointments**, **Tasks**, and **Email** messages. You can view the **Outlook Today** screen by clicking on the name at the top of your **Email** folder.





Practice Exercise 6 Outlook Today

Select the top folder in the Email folder list and Outlook Today will be displayed.



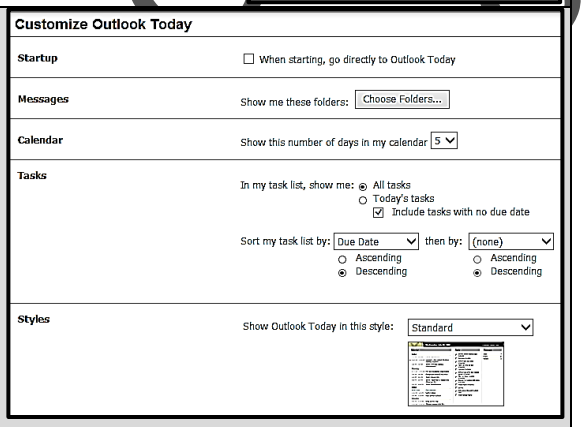
1.7 Customize Outlook Today

Click on the Customize Outlook Today ***located on the Top Right of the Outlook Today screen:***

Startup - This will open **Outlook Today** when **Outlook** is already opened.

Message - You can check the folders you want to be displayed.

Calendar - This will display a specific number of days from the current day.

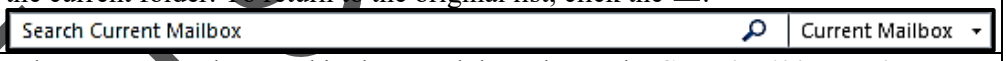


Tasks - This will display **Tasks** when the due date is coming up.

Styles - Additional styles can be downloaded from the internet.

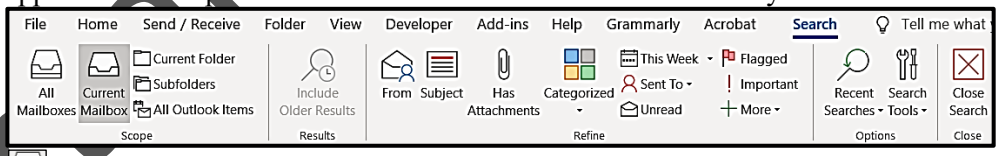
1.8 Instant Search

This is probably the most valuable feature in **Outlook**. It allows you to **Search** the **Email** folder for keywords on any topic, and is located on the top of the **Email** list available in **Contacts, Calendar,** and **Tasks**. When you click in the **Search** box, a contextual **Search Ribbon Tab** appears on the top. The default assumes searching the current folder. To return to the original list, click the ☒.



1.9 Search Ribbon Tab

When you type a keyword in the search box above, the ***Search Ribbon Tab*** appears on the top of the interface. This can be used to fine-tune your search.



All Mailboxes - This will Search in All **Email** folders.

Current Mailbox - This is usually the default **Mailbox** folder.

Current Folder - This is the default and will only search in an active opened folder.

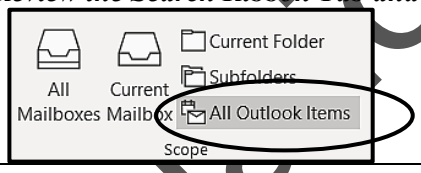
Subfolders - This will **Search** in the **Subfolders** under an opened folder.

All Outlook Items - This will search in **People**, **Calendar,** and **Email** folders.

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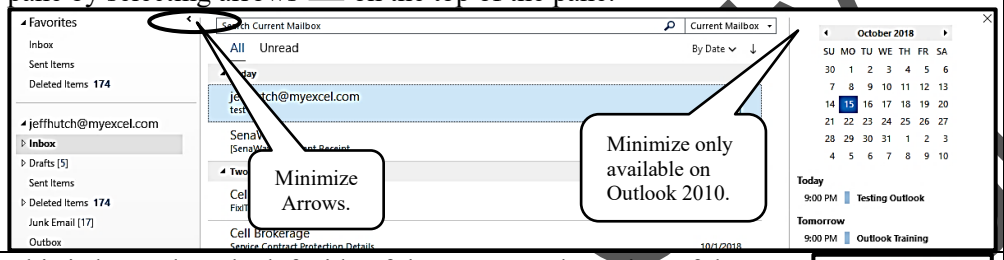
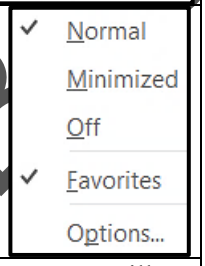
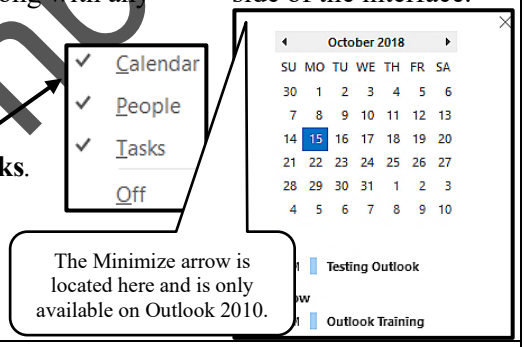
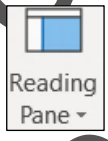
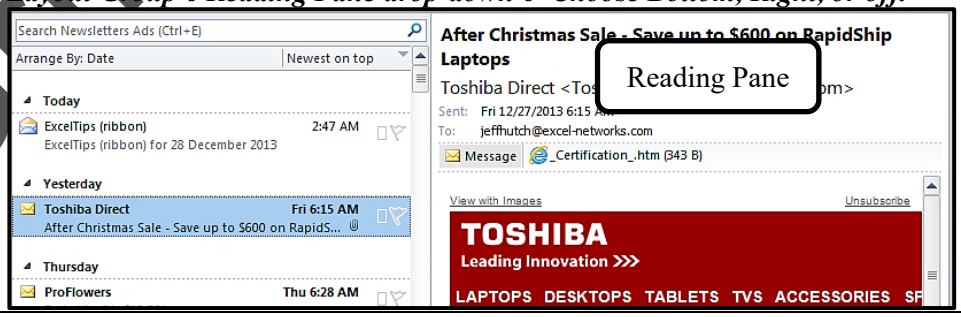
	 **Include Other Results** - By default, search results are limited and don't always display all results. After you enter search criteria, choose this option to display all search results.  **From** - This will search **Email From** a specific person.  **Subject** - This will search **Email** with a keyword in the **Subject** field.  **Has Attachment** - This will search **Items** that have **Attachments**.  **Categorized** - This will search **Items** that have been assigned a specific **Category**.  **This Week** - This will search **Items** within **This Week**.  **Sent To** - This will search an **Email Sent To** a specific person.  **UnRead** - This will search for an **Email** that has not been read.  **Flagged** - This will search an **Email** that has been **Flagged**.  **Important** - This will search **Items** that have been flagged as Important.  **More** - This will list many other usable search methods.  **Recent Searches -** This will list the keywords used in previous **Searches**.  **Search Tools -** This provides the following **Tools: Indexing Status, Locations to Search, Advanced Find,** and **Search options.**  **Close Search -** This will **Close** the **Search Ribbon Tab.**
1.10 Search Criteria	This concept explains the different ways to search for **Email**. **The basic format is*: keyword:(SearchCriteriaValue)***. For example, ***from:tom*** You can also use logical operators **AND, NOT, OR, <, >, =,** and so forth to refine your search, and examples are provided below. Logical operators must be typed in uppercase letters. **Tom** - Items containing tom, TOM, ToM, or any other combination of uppercase and lowercase letters. Instant Search is not case sensitive. **tom jensen** - Items containing both tom and jensen, but not necessarily in that order. **tom AND jensen** - Items containing both tom and jensen, but not necessarily in that order. Note that logical operators such as **AND**, **NOT**, and **OR** must be in uppercase letters. **tom NOT jensen** - Items containing tom, but not jensen. **tom OR jensen** - Items containing tom, jensen, or both. **"tom jensen"** - Items containing the exact phrase tom jensen. Note the use of Double Quotes (") so that the search results match the exact phrase within the quotes. **from:"tom jensen"** - Items sent **From** tom jensen. Note the use of **Double Quotes** (") so that the search results match the exact phrase within the quotes. **from:"tom jensen" about:"status report"** - Items sent **From** tom Jensen where status report appears in the subject line, body, and attachment contents. Note the use of **Double Quotes** (") so that the search results match the exact phrase within the quotes. **hasattachment:yes** - These are items that **Have Attachments**. You can also use hasattachment:true to get the same results.

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	attachments:presentation.pptx - These are items that have **Attachments** named presentation.pptx, (or if the attachment contains presentation.pptx within its contents). **subject:"tom jensen"** - Items whose **Subject** contains the phrase tom jensen. **subject:tom jensen** - Items with tom in the **Subject** line and with jensen anywhere else in the document. **cc:"tom more"** - Items in which the display name tom jensen is on the **CC** line. **cc:tomjensen@test.com** - Items in which the **Email** address tomjensen@test.com is on the **CC** line. **bcc:tom** - Items in which tom is on the **BCC** line. **messagesize:<10 KB** - Items whose **Size** is less than **10 kilobytes**. Note the use of the "less than" comparison operator (<). **messagesize:>5 MB** - Items whose **Size** is larger than **5 megabytes**. Note the use of the "greater than" comparison operator (>). **received:=1/1/2006** - Items that arrived on **1/1/2006**. Note the use of the "equals" comparison operator (=).
Practice Exercise 7 Search All Outlook Items	1. ***Search your inbox using the criteria above.*** 2. ***Change the keyword to a word that is in your Inbox.*** 3. ***Review the Search Ribbon Tab and change it to All Outlook Items*** 

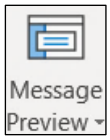
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Section 2: Inbox Layout

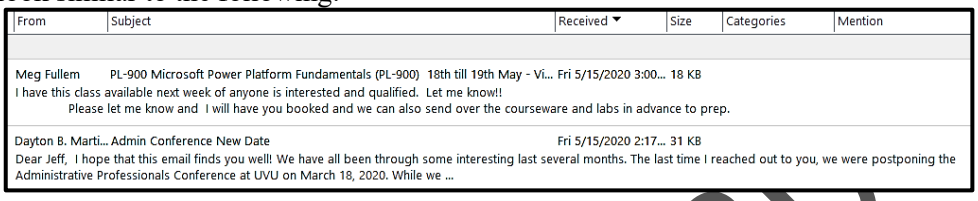
Concept	Explanation / *Command string in italic.*
1.11 Vertical Tri-Pane	The main **Navigation** pane is located on the left, **Email** list is in the middle, and the **To-Do Bar** is on the right side of the screen. You can also change the size of the **Tri-Pane** by moving the edges or bar between panes, and minimize the pane by selecting arrows on the top of the pane. 
1.12 Folder Pane 	This is located on the left side of the screen and consists of the first third of the **Tri-Pane** screen above. **To add or remove it:** ***View Ribbon Tab →Layout Group →*** ***Folder Pane dropdown arrow →***  **Tip**: In previous versions, this was called the **Navigation Pane**.
1.13 To-Do Bar 	The **To-Do Bar** incorporates information from different **Outlook** elements to make them immediately available. The **Date Navigator**, **Appointments**, along with any current **Tasks** will appear. The **To-Do Bar** will display on the right side of the interface. **To Turn the To-Do Bar on:** ***View Ribbon Tab →Layout Group →*** ***To-Do Bar dropdown arrow→*** **Select: ☑ Calendar, ☑ People, and ☑ Tasks.** **Tip**: **Outlook 2010** allowed you to minimize the **To-Do Bar** to the side of the screen. However, this is no longer available in later versions. 
1.14 Reading Pane 	The **Reading Pane** automatically displays an **Email** message when selected. You can change the size of a **Reading Pane** by dragging the top or left border between the message list and the **Reading Pane**. It can also be turned on in the **Calendar**, **Contacts**, **Notes,** and **Tasks Panes**. ***View Ribbon Tab →*** ***Layout Group →Reading Pane drop-down → Choose Bottom, Right, or off.*** 

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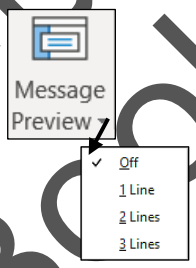
1.15 Message Preview



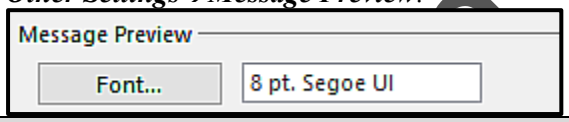
This will display 1, 2, or 3 lines of the **Email** under the title. Also, there is an option to turn it off completely. When 2 lines of an **Email** are displayed, it will look similar to the following:



To turn the **Message Preview** on:
View Ribbon Tab→Arrangement Group→ Message Preview:



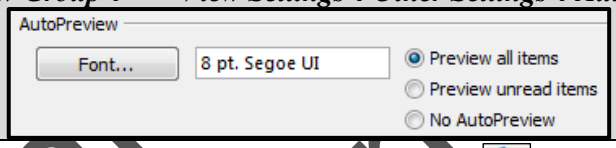
To change the font size, go to: ***View Ribbon Tab→ Current View Group→*** ***View Settings→ Other Settings→Message Preview***:



1.16 Autopreview

Outlook 2010 Only

The name of the **Message Preview** feature was called **Autopreview** in **Outlook 2010.** The feature has been moved to: ***View Ribbon Tab→Message preview*** in **Outlook 2013.** To turn the **AutoPreview** feature on: ***View Ribbon Tab→Current View Group→*** ***View Settings→Other Settings→AutoPreview***:

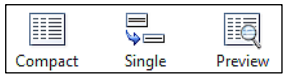


1.17 Change Views



View Ribbon Tab→Current View Group→ ***Change View***.

Compact - This will tighten up your **Email** to fit more on a single screen.

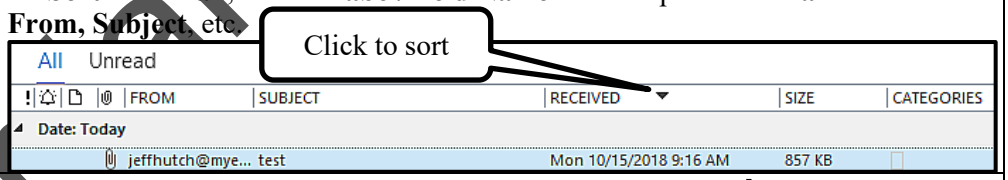


Single - This will display **Email** messages with a small space between them for reading purposes.

Preview - This will remove the **Reading Pane** and display all **Email**.

1.18 Sort Fields

To **Sort** the **Email**, click a **Label/Field Name** on the top of the **Email** such as **From, Subject**, etc.



Practice Exercise 8 Sort

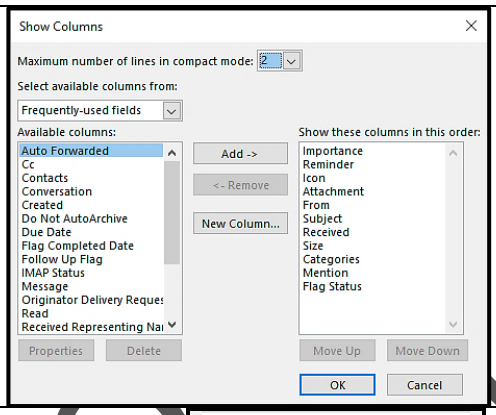
In the Inbox, click on the From Label/Field Name to Sort it→Type a letter of one of the names of the recipient in the list to jump to that letter.

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1.19 Add Fields

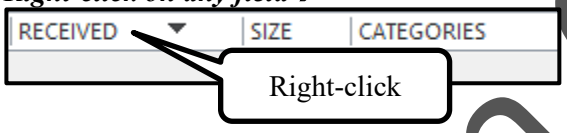
This **Adds New Labels/Field Names** to the top row **Label** area.
View Ribbon Tab → Current View Group → ***View Settings →Column.***

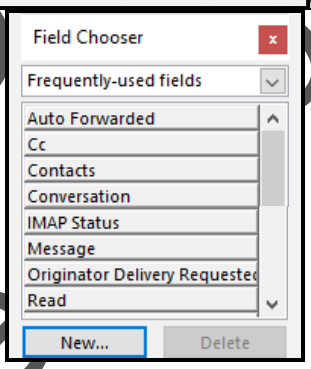
Tip: Another technique is to use the field chooser:
Right-click on any Label → ***Field Chooser.***



Practice Exercise 9
Field Chooser

Right-click on any field →

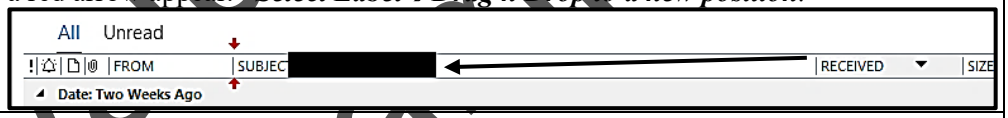




Field Chooser Options →Select "Received" field →
Drag to the desired position next to another Label/Field Name.
Also, you could Right-click on a Label/Field Name →
View Settings →Columns→Add/Remove Fields.

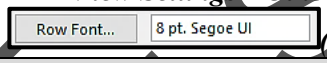
1.20 Move Columns

This allows you to **Move Labels/Field Names** to a different position when you see a red arrow appear. ***Select Label →Drag n Drop to a new position.***



1.21 Font Size

To adjust a displayed font size: ***View Ribbon Tab →Current View Group →***
View Settings →Other Settings Button →Row Font Button →



(Make changes) → OK → OK.

1.22 Quick Access

This could be used to place commonly used commands such as **"Send/Receive."**
Click the down arrow in the upper left corner →More Commands.
Choose commands from: All commands →Select command → Add >> ***Button.***

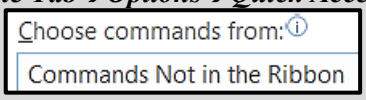
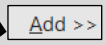
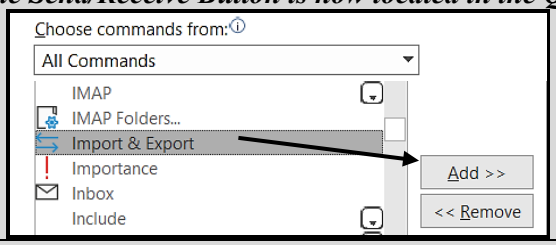
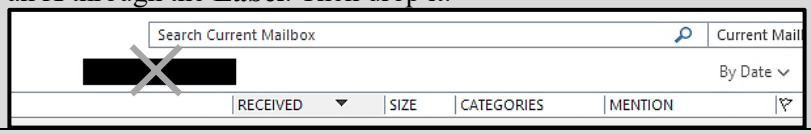
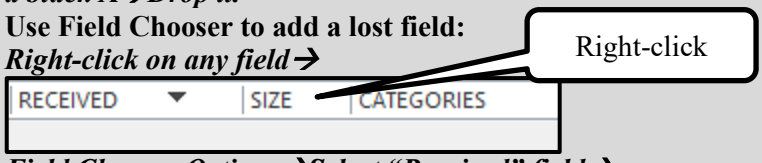
Outlook 365



Older Versions of Outlook



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Practice Exercise 10 Quick Access	***File Tab →Options →Quick Access toolbar →***  ***→Import/Export →***  ***Button →***  ***.*** ***The Send/Receive Button is now located in the Quick Access toolbar.*** 
1.23 Remove Fields	Select a **Label/Field Name** and drag upward until you see it turn black or it shows an **X** through the **Label**. Then drop it. 
Practice Exercise 11 Add/Remove Fields	1. **Remove a Label/Field Name:** ***Select the "Received" field upward until you see a black X →Drop it.*** 2. **Use Field Chooser to add a lost field:** ***Right-click on any field →***  ***Field Chooser Options →Select "Received" field →*** ***Drag to the desired position next to another Label/Field Name.***

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Chapter 2 - Sending Email

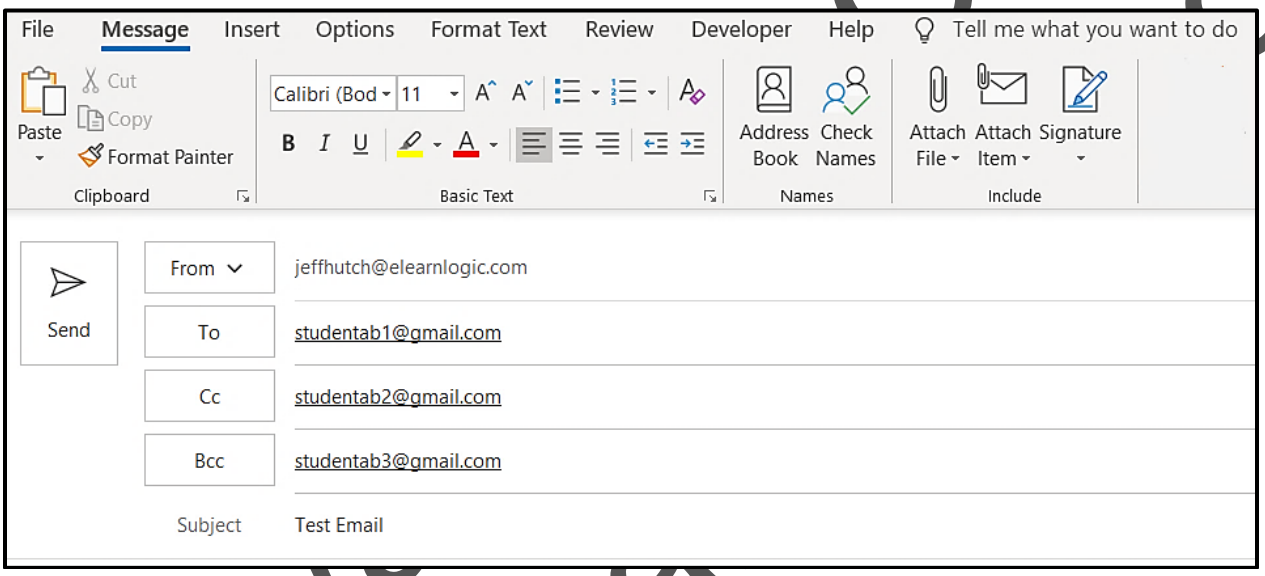
It is a simple process to **Send** an **Email**. However, additional options can also be added to this process.

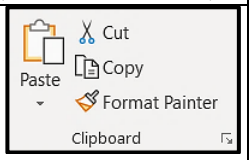
Chapter Table Of Concepts

[Section 1: Message Ribbon Tab](#) - **This section requires you to open a new Email.**
[Section 2: Options Ribbon Tab](#)
[Section 3: Advanced Sending Options](#)
[Section 4: Exchange Features](#)

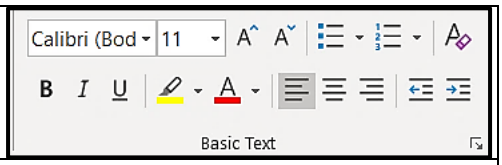
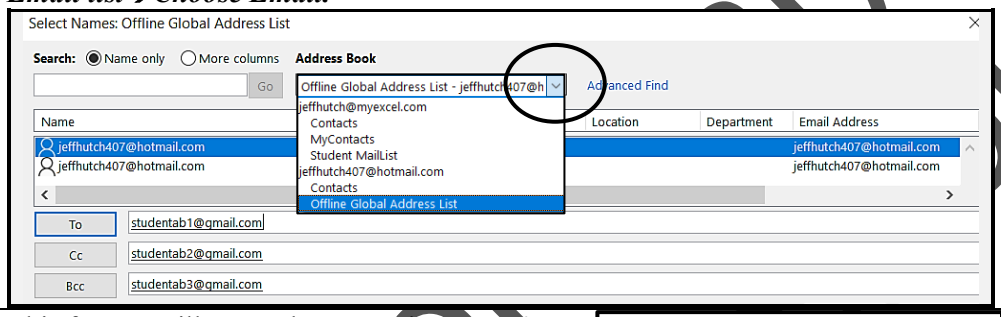
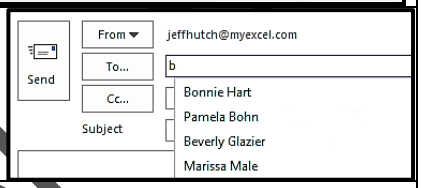
Section 1: Message Ribbon Tab

Here we will create a new **Email** and show the **Message Ribbon Tab**. These are the basic email sending options available.



Concept	Explanation / *Command string in italic.*
2.1 New Email 	**This is the most used command to create a new Email message:** 2010  ***Email Pane→Home Ribbon Tab→New Group→ New Email.*** **Tip**: Keyboard Command **Ctrl** **Shift** **M** keys - **Create a Message.** Keyboard Command **Ctrl** **N** keys - **Create a New Email (in the Mail Pane).**
2.2 Clipboard	When you **Copy** and **Paste** formulas to a different cell, the reference changes to a **Relative Position**. For example, if you **Copy** a formula that references cell **A1,** and then **Copy** it down one cell, it will then reference cell **A2**.  When pasting data from the internet or another document, you might want to paste using plain text to strip out all formatting. **When Pasting text use:** ***Paste dropdown arrow→***  ***Keep Text Only (T).*** **Tip**: Keyboard Command for **Copy** is **Ctrl** **C**, **Paste** is **Ctrl** **V**, and **Cut** is **Ctrl** **X** keys.

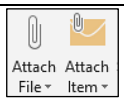
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2.3 Basic Text	These are the **Basic Text** formatting tools available. Press the **Arrow** in the lower right corner to get additional options. 
2.4 Address Book 	This will provide access to available **Names, Email,** and **Contact** information.
Practice Exercise 12 Address Book	***Place your cursor in the To field→Press the dropdown arrow→Choose another Email list→Choose Email.*** 
2.5Auto-Complete List	This feature will remember a previous **Email,** and when you type the first few letters of the same **Email,** it will complete the **Email Address**. 
Practice Exercise 13 Auto-Complete List	***Home Ribbon Tab→New Group→ New Email → To:(Type the first few letters of the Email).*** **Tip: To clear the AutoComplete list:** ***File Tab→Options→Mail Tab→Send Email category→*** Empty Auto-Complete List . **Tip: To turn the Auto-Complete List feature on:** ***File Tab→Options→Mail Tab→ Send Email category→*** ☑ Use Auto-Complete List to suggest names when typing in the To, Cc, and Bcc lines
2.6 Manually Entering Emails	To send **Multiple Email** addresses, you can use semicolons between them. If you use **spaces** or the **Enter** key, semicolons will be created automatically. 
2.7 Check Names 	If there are syntax issues with the **Email Address** (such as missing a @ or a special character is used), this will tell you which **Email Address** is in violation.
2.8 Attach Files (Paper Clip) 	You can insert any type of file into a message known as an **Attachment.** The icon to the right is for **Outlook 2010.**  **Tip: To Remove an Attachment:** ***Press the dropdown arrow next to the Attached File and press*** ✕ Remove Attachment
Practice Exercise 14 Attachments	***Home Ribbon Tab→New Group→ New Email→ To: Send to yourself→ Subject: Statement of Work→Message Ribbon Tab→ Include Group→ Attach File →*** Browse This PC... → ***C:\Data\Outlook365-1\Statement Of Work.docx→*** Insert → ***Send.***

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2.9 Attach Item

An **Item** is any item inside **Outlook** (not an external file) and can be used to send as an attachment to an **Email**. This includes **Email**, **Contact**, **Calendar**, **Tasks**, **Notes,** etc.



Practice Exercise 15 Attach Item

Home Ribbon Tab →New Group → New Email →Message Ribbon Tab → Attach Item Button →(Choose an Item).

2.10 Signature Changes

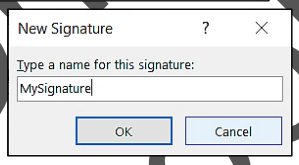
A **Signature** is a way to place a salutation in every new message created.

Practice Exercise 16 Signature

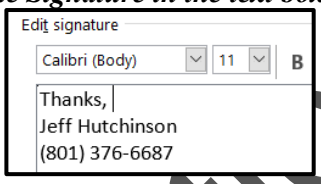
1. **To create a Signature:** ***File Tab →Options →Mail →*** Signatures... ***Signatures Button***.



2. New ***→Type in the signature name: MySignature →*** OK



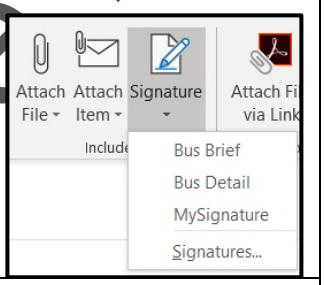
3. ***Type the Signature in the text box.***



→ Save → OK

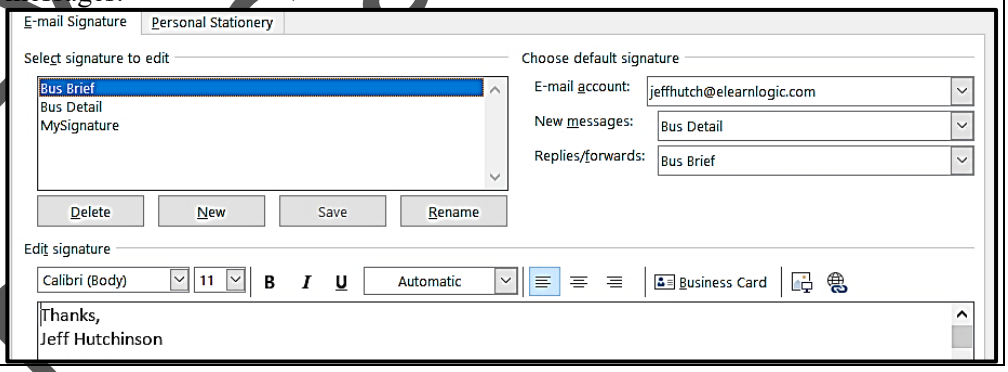
When you begin a **New Email**, you can always add, change, or remove a salutation at any time:
New Email →Message Ribbon Tab →

Include Group → ***Signature drop-down →***
Choose a new salutation: ***MySignature.***



2.11 Selecting Default Signatures

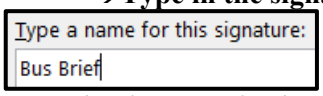
You can create multiple **Signatures** to use when designing messages. You can also set a default **Signature** for new messages, as well as for **Replies** and **Forwarded** messages.



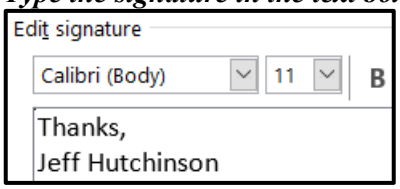
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Student Project A Signature

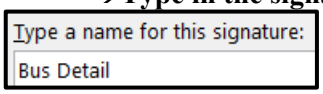
1. ***Home Ribbon Tab → New Group →*** ***New Email.***
2. ***Message Ribbon Tab → Include Group →***
   Signature drop-down → Signatures.
3. New **→Type in the signature name**: ***Personal*** → OK



4. ***Type the signature in the text box.***



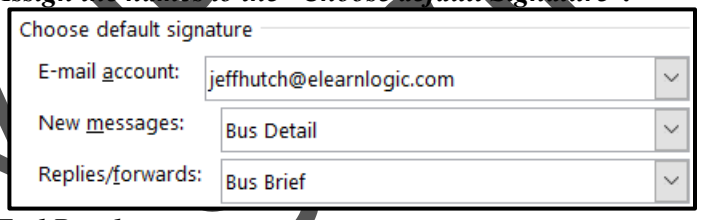
5. New **→Type in the signature name**: ***Personal*** → OK



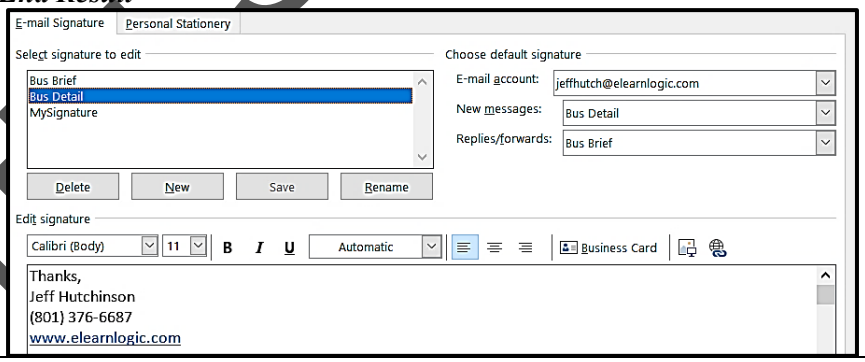
6. ***Type the signature in the text box.***



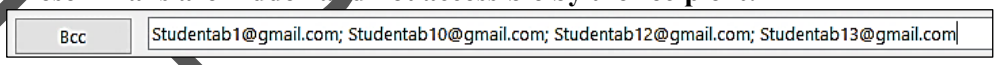
7. ***Assign the names to the "Choose default Signature".***



8. ***End Result***



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2.12 From Field	Use an **Email** address that has your full name because this is what the recipient will see. If you have multiple **Email** addresses installed in **Email Accounts**, check to see which one looks more presentable to the reader. **For example,** ***john.johnson@eib.com or jjohnson@eib.com.***
2.13 To Field	Recipient addresses are usually stored in a **People/Contacts** folder or **Exchange Server** folders. The following are a few rules to follow: 1. If you type in multiple **Email** addresses, separate them with a semicolon (;). 2. When you send an **Email** to someone, the recipient is expected to read the **Email** and respond. Otherwise, if you are just sending information, then add them to the **CC** field.
Practice Exercise 17 *New Email*	**Start a New Email to see how it is displayed:** ***Home Ribbon Tab→New Group →*** ***New Email→Studentab1@gmail.com; Studentab2@gmail.com.***
2.14 CC Field	This is a **Carbon Copy.** A copy of an **Email** will be **Sent** to a person who has an interest in the information but does not need to reply.
2.15 BCC Field	This is a **Blind Carbon Copy** or **Email Sent** to a different person without the "**To**" person's knowledge. This is **not** to be used if the "To Recipient" would be upset that you copied an **Email** to someone else. However, it could be used to send a copy of an **Email** to yourself. One warning is if the **"BCC"** person does a **Reply All**, the **"To"** person will also get a reply. **Tip**: To keep **BCC** permanently open: ***Start New Email→Options Ribbon Tab→ Show Fields Group→Choose***  ***BCC button.***
2.16 BCC Group List	Often the **BCC** fields are used to send multiple **Emails**, especially if you want an **Email** to be hidden from all recipients. On the other hand, lists that are placed in the **CC** field have the potential to be placed on a **Junk Mail** list. Therefore, this is why you would want to hide the distribution list in the **BCC** field.
Practice Exercise 18 *CC & BCC*	***Home Ribbon Tab→New Group→*** ***New Email→To: studentab1@gmail.com →CC: (your Email address)→BCC: studentab2@gmail.com.*** Notice: The **Email** you received does not display the **BCC** recipient. **Everyone will have free access to these Email addresses:**  **These Emails are hidden and not accessible by the recipient:**  Studentab1@gmail.com; Studentab10@gmail.com; Studentab12@gmail.com; Studentab13@gmail.com
2.17 Subject Field	Take time to write a good **Subject** line. Too often, the **Subject** is last on the list to craft. We will list some good and bad **Subject** lines to review so your **Email**s will be more effective: 1. **Six Words - The subject should be a short statement of six words or less.** **Good example:** "Sales Meeting Canceled." **Bad example:** "Sales meeting canceled due to overwhelming sales." 2. **Company Name - Try to use the company name as part of the subject statement.** Subject: "elearnlogic - Computer Training Specials" 3. **Summary - Begin your message at the Subject line** and only provide a quick summary of what the **Email** is about. **Good example:** "Sales Meeting Rescheduled." **Bad example:** "The sales meeting is rescheduled to Wednesday." 4. **Action - A good Subject states an action** that requires the recipient to do something. **Good Examples:** "Sales Meeting Canceled," "Class Dates to

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	Schedule," "Class Survey - Provide Feedback," "Computer Training Special." **Bad Examples:** elearnlogic - Class Information, Increase Your Productivity." 5. **Splitting - Try splitting your subject into several statements** such as: "Increase Productivity / Expand Computer Skills", or "Class Survey - Provide Feedback." 6. **FW or RE - Don't put FW: or RE: in subject line** unless it is an actual Forward or Reply. This is a violation of the Federal CAN-SPAM act. Example: "RE: elearnlogic - Read About It." 7. **Email Discussions -** When having an **Email** discussion, or responding to **Email** in a **back-and-forth discussion**, don't change the **Subject** line text. This makes it easier to follow the **Email** discussion and the sorting will group all **Email**s. The **Subjects** "RE: Rooms to Rent", "Rooms to Rent" and "FW: Rooms to Rent" will be grouped. 8. **Unique Subject - Change the Email discussion Subject line** so your reply will be unique. If there are numerous **CCs** on the list, this would make sure your address name stands out. Also, if the **Subject** has truly changed, you might not want to be grouped with the original message. 9. **Three Qualities - There are three points to remember**: 1) Is it relevant to the target audience? 2) Is it consistent with the body of the **Email**? 3) Is it credible? Bad example: eLearnLogic - 110% savings on your next class.
2.18 Body Area Greeting	This will define how you address the receiver of the **Email**. The following are a few rules to follow depending on the relationship or how well you know the receiver of the **Email**: 1. **First Name -** Use the first name in most cases. First names are used to address the recipient in a casual manner. Example: "Dear Jeff." 2. **First and Last name -** If you've *never* communicated with the recipient, you should use first and last names such as "Dear Jeff Hutchinson." 3. **Formal Salutation -** This can be used where appropriate such as "Mr., Ms., Mrs., or Dr." Some experts claim the formal salutation should be used to address new recipients, but it is not commonly used. 4. **Last Name only -** If only the last name is available, then it might be appropriate to use the formal salutation. Example: Mr. Hutchinson. 5. **Group Email -** You could use generic greetings such as "Good Morning, Good Afternoon, Good Morning Team." 6. **Informal greeting possibilities -** "Hi Jeff, Hello Jeff, Dear Jeff."
2.19 Body Area Leading Paragraph	This will introduce or grab the reader's attention. If you lose them now, the reader will not read any further. The following are a few rules to follow: 1. Identify yourself, the company, and possibly your position. Example: I am your sales Representative from elearnlogic serving your account. 2. If you are using a list, the first paragraph will explain how you are presenting the information. Example: The list below contains classes you might be interested in attending. 3. It should also contain the action you expect the recipient to take. The action could be moved from here and added to the closing statement of the **Email**. Example: You can call me directly or call our customer service department to register.

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2.20 Body Area

This is the main point you are trying to get across. Keep the core message direct and simple. The following are a few suggestions to follow:

1. It is best to provide a **Bullet** or **Number List** to ease reading.
   Example: - Microsoft Word 365 Level 1
   - Microsoft Excel 365 Level 1
2. If bullets lists are not automatically generated, you can **use a star (*) or dash**.
   Example: * Microsoft Word 365 Level 1
   * Microsoft Excel 365 Level 1
3. A bullet list is best if topics have **Equal Priority**.
   Example: - Microsoft Word 365 Level 1
   - Microsoft Excel 365 Level 1
4. A **Number List** is best if topics have different priorities and the first topic listed is the most important item or for a process.
   Example: Classes are listed by the highest demand classes first:
   1. Microsoft Excel 365 Level 1
   2. Microsoft Word 365 Level 1
5. **Paragraph Structure** - Keep the paragraphs short with separate ideas to improve readability.
6. **Avoid abbreviations** whenever possible. If used, and the recipient does not understand the jargon, they may avoid answering the **Email** due to misunderstanding. Example: ***lol, btw, etc***.
7. If you are unsure the **Email** will tab properly, to test it, **Email** it to yourself.

2.21 Body Closing Paragraph

This is an **Action** statement or what you want the recipients to do. The following are a few suggestions:

1. This provides some required action. Example: You can contact customer service to register for a class at customerservice@elearnlogic.com or call (800) 333-3333.
2. The **Closing Paragraph** should be simple and as brief as possible. Long **Closing Paragraphs** will weaken the core message. **Good example:** "I want to thank you for your time." " I hope to hear from you soon." " I will be awaiting your reply."

2.22 Body Signature

The goal of a **Signature** is to identify the sender. The following are a few possible ideas:

1. Keep the closing **Signature** simple such as "Thank You," "Good Luck," or "Regards," etc.
2. Too much information could be over-kill; however, not enough information may appear unprofessional. **Example**:

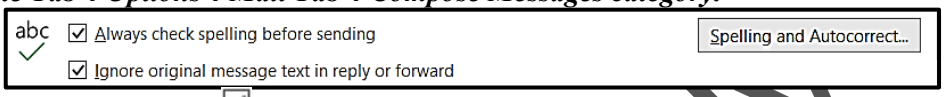
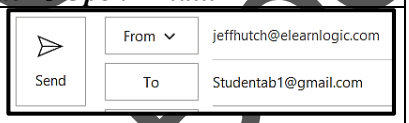
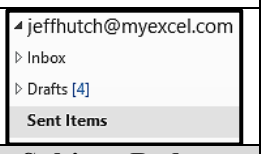
Good Example:	**Bad Example:**
Thank You, Jeff Hutchinson Marketing Manager (801) 407-6388	Regards, Jeff Hutchinson

3. A common professional signature follows:

Salutation:	Thank You,
Name:	Jeff Hutchinson
Title:	Marketing Director
Company:	elearnlogic
Direct Phone:	Direct (801) 376-6687
Web:	www.elearnlogic.com

4. Graphic images, including stationary, sometimes appear as a broken image.

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Practice Exercise 19 Body Signature	***Use the guidelines listed above to craft a message to someone and convince them to take this class. List 3 items you feel were valuable to you.***
2.23 Always Spell Check	When the **Email** is **Sent**, this will do a quick **Spell Check** before sending.
Practice Exercise 20 Always Spell Check	***File Tab →Options →Mail Tab →Compose Messages category.***  **Tip: Outlook 2013:** ☑ ***Always Spell Check*** **Outlook 2010:** ☑ ***Always Check.***
2.24 Save A Draft	This is primarily used when creating and **Sending Email**. It allows you to save an **Email** to a temporary folder to be edited or **Sent** at a later time. ***Home Ribbon Tab →New Group →*** ***New Email →*** ***To: Studentab1@gmail.com →*** ***Press the close*** ✖ **→** Yes **→Open the drafts folder →Open Email.***
2.25 Sending A Message	Press the **Send Button** in the **Home Ribbon Tab**.  **Tip**: Keyboard Command **Alt** **S** keys - **Send the Email.**
2.26 Manual Send/Receive	Press the **"Send/Receive All Folders"** in the **Send/Receive** ***Ribbon Tab***. By default, the system checks every 30 minutes. However, this feature will send the **Email** immediately. If you click on **Send/Receive Group**, you can customize the defaults.  **Tip**: Keyboard Command **Ctrl** **M** keys - **Send and Receive All Messages.**
Practice Exercise 21 Send/Receive	You can also use the **Quick Access** toolbar located in the upper left corner of the screen. ***Send/Receive Ribbon Tab →Send/Receive Groups →*** ***All Account Groups.***
2.27 Viewing Sent Items	You can **View** all **Messages** that have been **Sent**. ***Choose the Sent Items Folder.*** 
2.28 Most Common Mistakes Made	The above concepts are techniques used to craft an **Email** in the **Subject**, **Body**. etc. The following are some common mistakes when sending **Email**. 1. **A vague subject line -** The **Subject Line** not only lets the person receiving the message know what the **Email** is about, but also provides him or her with a reason to read it. The **Subject Line** acts as the window into the message and can also indicate its urgency. 2. **No sign-off -** A **Weak Signature** is almost as bad as a weak handshake: Both convey a lack of professionalism. Too much advertisement information in your signature diminishes your effectiveness. 3. **Too Casual -** Many people take a **Casual Approach** when using **Email**. However, what you write is a reflection of your professional self, so take the time to craft complete sentences, use proper grammar, and check spelling. 4. **Going On and On -** This strategy might work for the **Energizer Bunny**, but your goal when crafting a message should be to keep it short. 5. **Striking the wrong note -** Unfortunately, it's easy for the tone to be lost with the written word, especially in shorter messages. An attempt at humor, for instance, maybe read as something offensive or inappropriate. If you're not sure how something you wrote will be interpreted, err on the side of caution and leave it out.

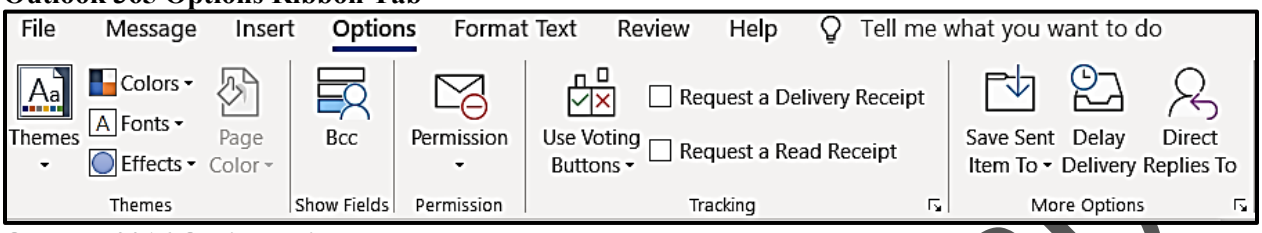
Evaluation Only
Sample Book

	6. **Weighing others down -** Limit the distribution of massive files to people who need them. 7. **Sending to the wrong box -** Before you send a message, always double-check the list of recipients. Many **Email** programs automatically fill in the information you've previously typed, such as the **Email** addresses of frequent contacts. If you have multiple people in your Contacts folder with similar names, you could mistakenly choose the wrong person and send him or her a message intended for someone else. 8. **Mixing business and pleasure -** When the information is confidential or sensitive, this move could limit your career. Any time you use your work **Email** account, the message should be business-related. Have your friends send non-work-related **Email** to your account so you can check it at home or on the internet. 9. **Over Emailing -** Do you find yourself typing a long message in order to avoid confusion on the recipient's part? Do you hesitate to click **Send** because you think your contact might forward your message to someone who shouldn't see it? **Email** is best suited for quick communication, and, in situations like these, it's wise to call your colleague or speak to him or her in person instead.
2.29 Emoticons Electronic Abbreviations	These should only be used if you have a personal relationship with the recipient. You can't assume that the recipient will understand these symbols. :-) = Happy :-(= Sad :-D = Laughing or very happy ;-) = Winking ":-| = Undecided :-o = Shocked x-(= Really upset :-/ = Skeptical or Confused} BTW = By The Way FYI = For Your Information FAQ = Frequently Asked Questions IOW = In Other Words IMHO - In My Humble Opinion LOL - Laughing Out Loud
2.30 Email Addiction Desktop	When constantly reading **Email**, it disrupts thought process and the ability to be able to focus on projects. It is suggested you allocate specific times to read **Email** and process as many as possible. Critically evaluate your **Email** reading times. **Smart Phones -** This adds a new element to our ability to constantly read **Email**. It is suggested to use **Smart Phones** in order to check for critical **Email** when you are on the go, and allocate other specific times to process incoming **Email**.

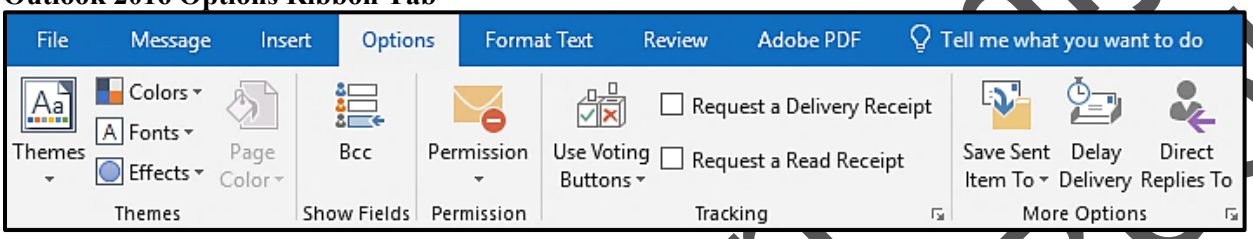
For Partial

Section 2: Options Ribbon Tab

Outlook 365 Options Ribbon Tab

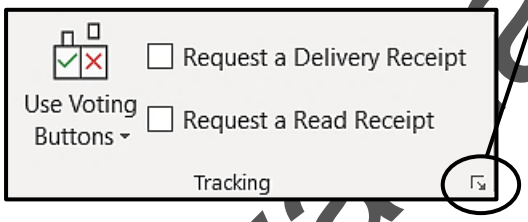


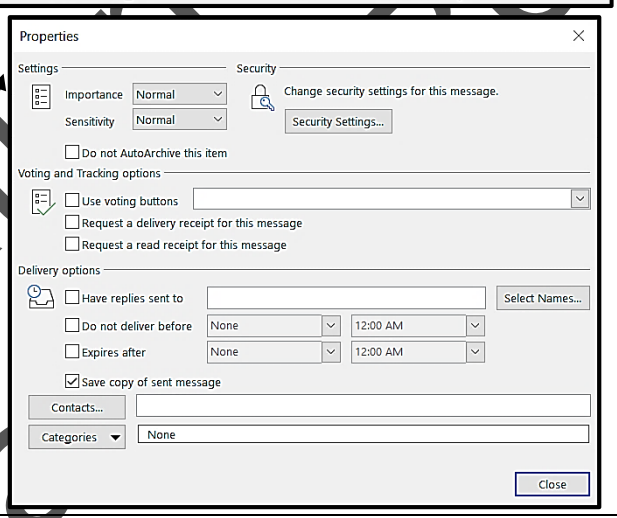
Outlook 2016 Options Ribbon Tab

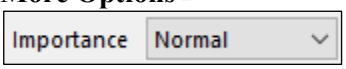
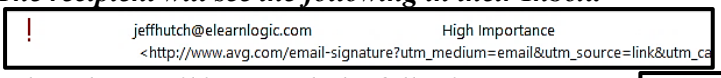


Advanced Options:

New Email → Options Ribbon Tab → Tracking Group → Press the  ***in the lower-left corner.***





Concept	Explanation / *Command string in italic.*
2.31 Message Settings Importance	The default **Importance** setting is **Normal. High Importance** appears in the recipient's **Inbox** with a red exclamation mark ! High Importance. **Low Importance** appears with a blue, down-pointing arrow ↓ Low Importance. **Tip**: This also available at: ***New Email → Message Ribbon Tab → Tags Group → Click*** ! High Importance ***or*** ↓ Low Importance. **More Options** 
Practice Exercise 22 Importance and Sensitivity	**Email** yourself and set the **Importance** level to **High**. 1. ***Home Ribbon Tab → New Group →*** ***New Email → To: Yourself → Subject: Important.*** 2. ***Message Ribbon Tab → Tags Group →*** ! High Importance ***Button →*** ***Send.*** 3. ***The recipient will see the following in their Inbox.***  4. ***When the Email is opened, the following will be displayed in the Banner.*** 

For Evaluation Purposes Only
Partial Sample

2.32 Message Settings Sensitivity

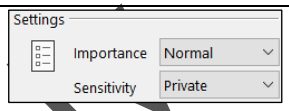
The default **Sensitivity** setting is **Normal.** If you select a setting of **Personal, Private**, or **Confidential**, the message will be delivered with a message in the **InfoBar** (bar on top of the message) asking the recipient to treat the message as **personal, private,** or **confidential.**

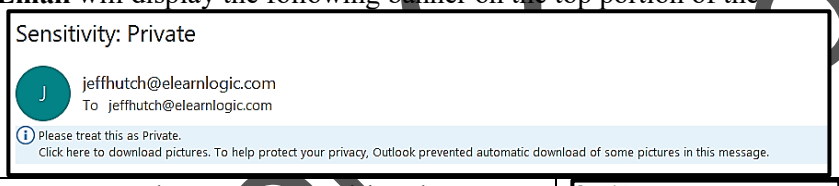


Practice Exercise 23
Sensitivity
Private

Set the **Sensitivity** level to **Private** and **Email** yourself.

1. ***Home Ribbon Tab →New Group →*** ***New Email →***
   To: Yourself →
   Subject: Sensitivity: Private
2. ***Options Ribbon Tab →Tracking Group →***
   More options → Sensitivity: Private → Close → ***Send.***
3. The **Sent Email** will display the following banner on the top portion of the **Email**.



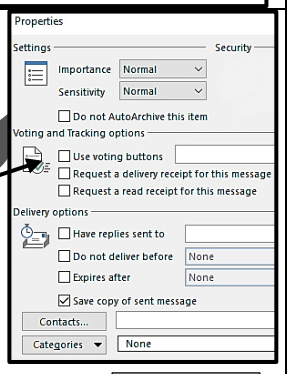


2.33 Voting

Voting allows you to send a message requiring the **Recipient** to answer a question (called a **Vote**). The **Recipient** will see an additional **Voting Button** located at the top of the **Email** to respond.

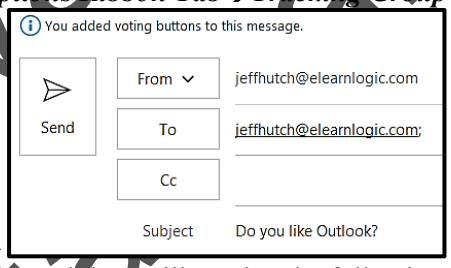
Options Ribbon Tab →Tracking Group →

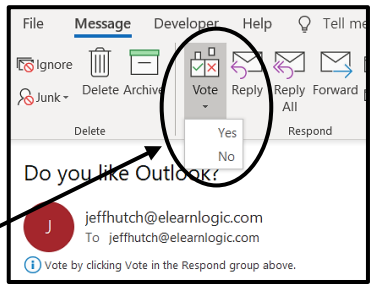
Use Voting Buttons or Options Arrow.



Practice Exercise 24
Voting

1. ***Home Ribbon Tab →New Group →*** ***New Email →***
   To: Your Neighbor →
   Subject: Do you Like Outlook?
2. ***Options Ribbon Tab →Tracking Group →*** ***Use Voting Button →*** Yes;No
   →Press ***Send.***





3. The recipient will receive the following message and the **Voting** button will be located in the **Message Ribbon Tab.**

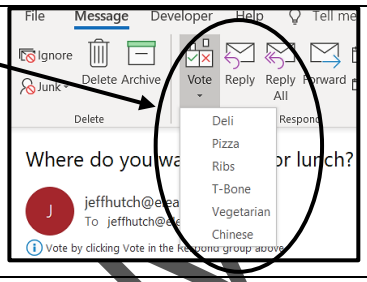
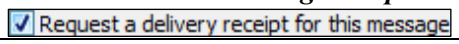
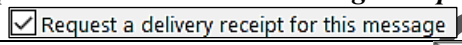
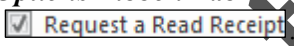
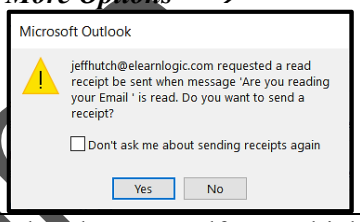
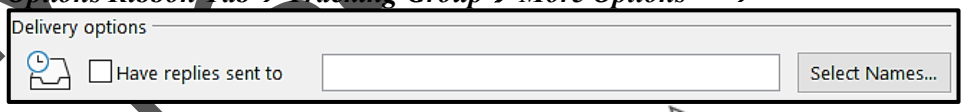
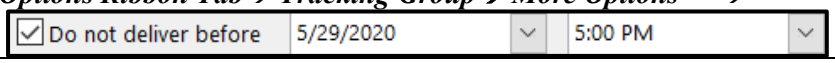
Practice Exercise 25
Custom Voting

1. ***Home Ribbon Tab →New Group →*** ***New Email →***
   To: Your Neighbor →
   Subject: Where do you want to eat for lunch?
2. ***Options Ribbon Tab →Tracking Group →*** ***Options Arrow →*** **Type the following in the Voting Box:** ***Deli;Pizza;Ribs;T-Bone;Vegetarian;Chinese***



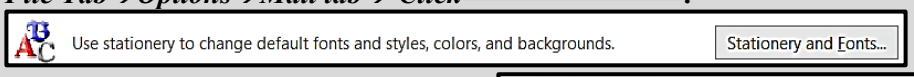
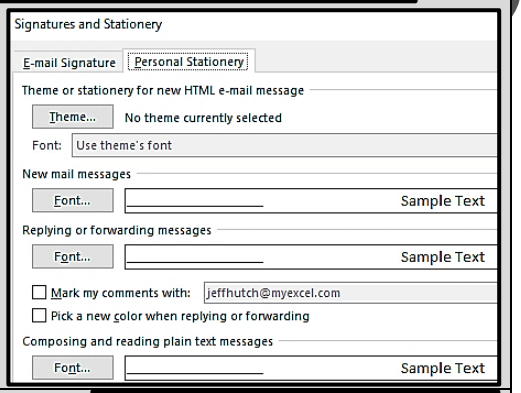
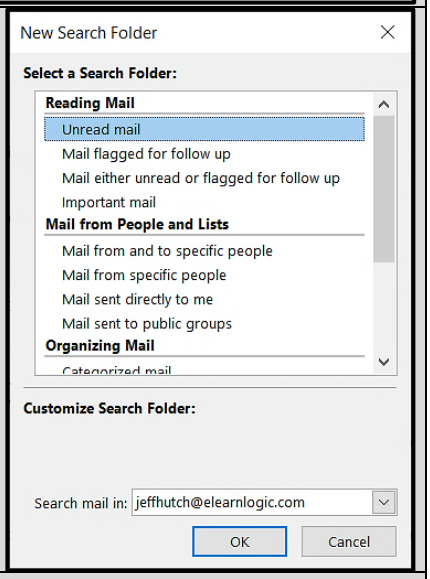
3. ***Press*** ***Send.***

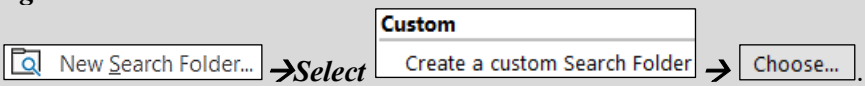
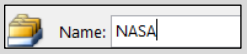
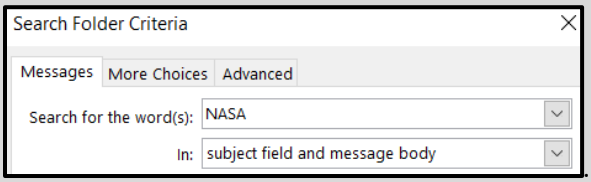
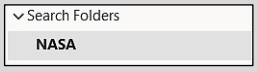
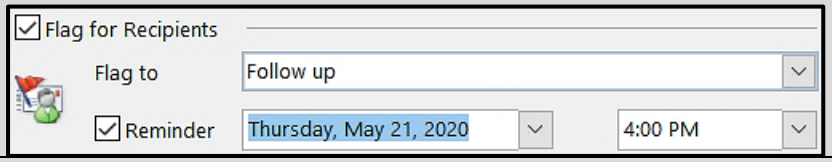
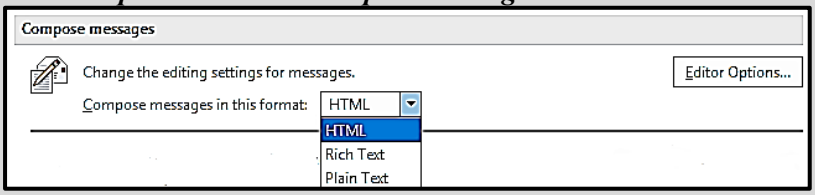
For Evaluation Only
Participant Sample Book

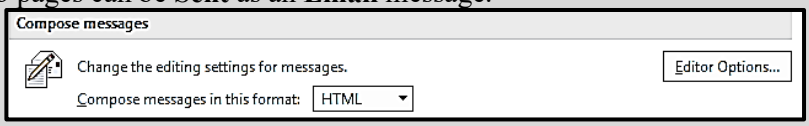
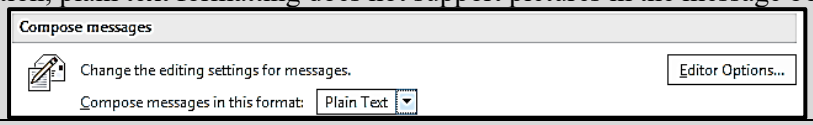
	4. ***The result will look like the following:*** The recipient will receive the following message and the **Voting** button will be located in the **Message Ribbon Tab.** **Tip:** You might want to add a message in the **Body** of the **Email** referring to the **Voting** button in case the recipient is not familiar with the feature. 
2.34 Request Delivery Receipt	You will receive a response **Email** from the recipient **Email** system if it was **Delivered**. **Tip:** Some **Email** servers will not send a response. ***Options Ribbon Tab → Tracking Group → More Options*** → 
2.35 Request Read Receipt	A **Read Receipt** will prompt the receiver when the **Email** is opened. The receiver has the option of answering **Yes/No** to respond. ***Options Ribbon Tab → Tracking Group → More Options*** → 
Practice Exercise 26 Read Receipt	1. ***Home Ribbon Tab → New Group → New Email.*** ***To: Yourself →*** ***Subject: Are you reading your Email*** 2. ***Options Ribbon Tab → Tracking Group → More Options*** →  3. ***Press Send.*** 4. ***When you receive the Email, open it and respond to the following prompt.*** 
2.36 Delivery - Have Replies Sent To	This is used to have replies **Sent** to recipients other than yourself, or multiple people. This could be used as a survey to return to multiple people.
Practice Exercise 27 Delivery Options	1. ***Home Ribbon Tab → New Group → New Email.*** 2. ***Options Ribbon Tab → Tracking Group → More Options*** →  3. ***Add several Email addresses in the box above → Press Send.***
2.37 Delivery - Do Not Deliver Before	This is used to specify a date on which you want to send a message. In other words, it means **Delaying** the message. It could be useful if a person receiving an **Email** is on vacation for a week. **Delaying** the **Email**, it will be located at the top of the **Inbox** when they return. Also, if you know the **Recipient** won't be in the office until after lunch, you can **Delay** the message until 1pm so they will receive the **Email** when they return to the office.
Practice Exercise 28 Delay Message	1. ***Home Ribbon Tab → New Group → New Email.*** 2. ***Options Ribbon Tab → Tracking Group → More Options*** → 

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Section 3: Advanced Sending Options

Concept	Explanation / *Command string in italic.*
2.38 Inserting A Hyperlink Into A Message	You can **Insert** a **Hyperlink** into the body of a message or the message subject. **Hyperlinks** are connections to other files or websites.
Practice Exercise 29 Hyperlink	***Create a new message and type the following text in the message box: "Check out this website:"→Press the*** **Enter** ***key→Type*** http://www.elearnlogic.com ***→ Press*** the **Enter** ***key→ hold the*** **Ctrl** ***key and then click the URL.***
2.39 Stationery	This is used to reformat the look and layout of an **Email** message. ***File Tab→Options→Mail tab→ Click*** Stationery and Fonts... .  **Tip:** If the recipient **Email** is set up as plain text format, the **Stationery** will convert to an attachment. 
2.40 Search Folders	This is located on the bottom of the folder list in the **Search** folder. You can create a custom search folder by **Right-clicking** on it. **Find the Search Folder located on in left side of the interface:** ***Click on*** Search Folders ***Search Folders→*** **Then choose:** ***New Search Folder:*** **Unread Mail Search Folder -** New messages are delivered to the **Inbox** folder, but also appear in the **Unread Mail Favorite** folder. **Favorite** folders do not store messages. Rather, they show views of messages that meet specified criteria. 
Practice Exercise 30 Unread Mail	1. **If you do not have an Unread folder:** ***Right-click on the Search Folders (located on the bottom of the left-side Navigation Pane)→*** New Search Folder... ***→Choose Unread Mail→*** OK . 2. ***Send an Email to your neighbor→Check the Unread Mail folder.*** 3. **To show it in favorites:** ***Right-click on the Unread Mail folder→ Add To Favorites.***

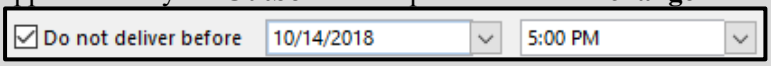
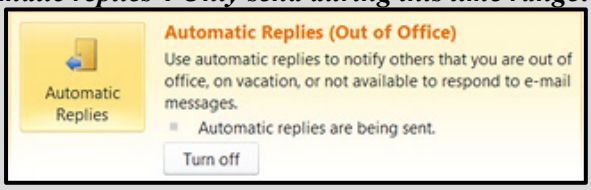
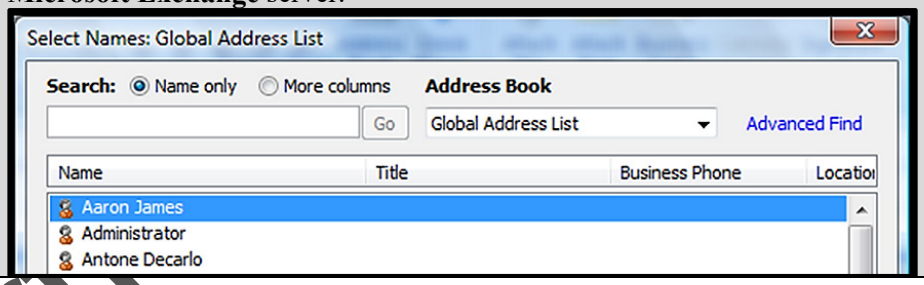
Practice Exercise 31 Custom Search Folder	Create a **Custom Search** folder called **NASA** to list all keywords in **Emails** with the name. 1. ***Right-click on the Search Folders*** →  ***Select*** . 2.  →  3. ***Press*** OK → OK → OK →**Review the results:**  . **Test It:** ***Send an Email to yourself with the word NASA in the Subject or Body of the email.***
2.41 Flag For Follow-Up	This is a **Sending Option** used to notify the receiver of an important event. 1. ***Home Ribbon Tab →New Group →*** ***New Email.*** 2. ***Message Ribbon Tab →Tags Group →*** Follow Up . 
Practice Exercise 32 Flagged Email	This will send an **Email** to your neighbor in the class and remind them that at 3:00 pm there will be a conference call at 4:00 pm. 1. ***Home Ribbon Tab →New Group →*** ***New Email.*** ***To: Your Neighbor →*** ***Subject: Conference Call Reminder.*** 2. ***Message Ribbon Tab →Tags Group →*** Follow Up ***dropdown Arrow →*** Custom... : 
2.42 Message Formats	In **Outlook**, messages are composed in the **Message window** providing several message formats to be used to create and edit **Email**. They include **HTML**, **Outlook Rich Text**, and **Plain Text**. Keep in mind, that if the recipient uses plain text to read **Email**, then your nicely formatted message will not be formatted the way you would think. **HTML** is an **Outlook** default, but it can be easily changed. If you have a critical **Email**, you may want to see what it looks like in **Plain Text** format before you send. Therefore, send it to yourself to see what it looks like first. ***File Tab →Options →Mail →Compose Messages.***  **Hypertext Markup Language - (HTML)**This is the default message format. **HTML** is the format used to create web pages for publication on the **World Wide Web**. **HTML** formatted messages can include text formatting, background colors,

	graphics, and multimedia objects such as animation, sound, and video clips. Entire web pages can be **Sent** as an **Email** message.  **Plain Text** - This is a format that all **Email** programs understand. It does not, however, support many types of text formatting, such as **Bold** and **Italic**. In addition, plain text formatting does not support pictures in the message body. 
Practice Exercise 33 Editor	***File Tab →Options →Mail Format Tab →Compose Messages →Plain Text →*** OK ***→Create a new mail message.*** ***Notice the text (Plain Text) in the Message window title bar.***

For Evaluation Partial Sample Book

Section 4: Exchange Features

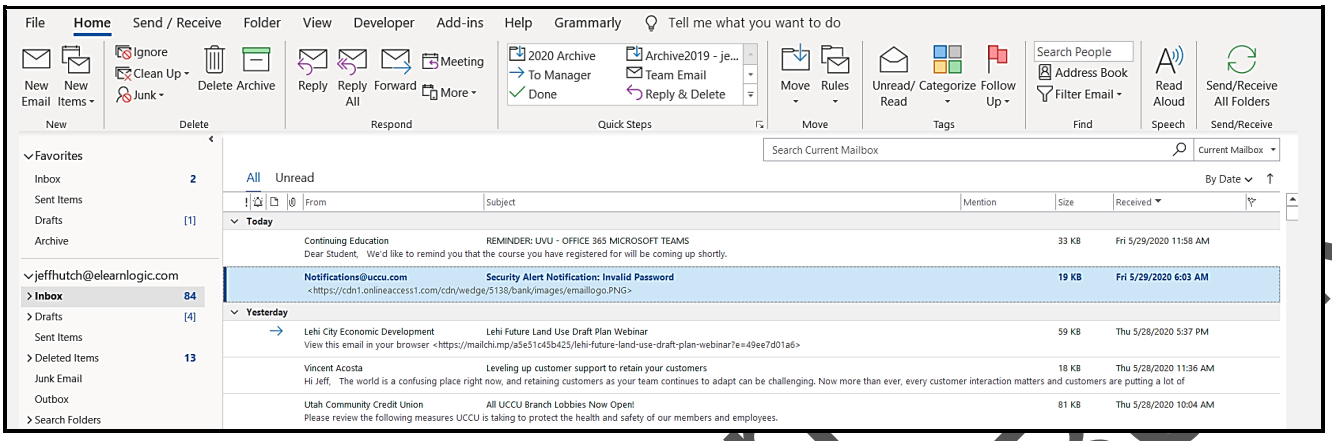
Exchange is an **Email** server used in conjunction with **Outlook**.

Concept	Explanation / *Command string in italic.*
2.43 Delivery Do Not Deliver Before	This is used to delay the sending of a message. On **Exchange,** the message disappears from your **Outbox** and is queued on the **Exchange** server. 
2.44 Out of Office Assistant	This automatically responds to an incoming **Email** once if you are out of the office. ***File Tab →Automatic Replies Button (in the middle section) →Send automatic replies →Only send during this time range.***  **Tip:** If you do not specify a time range, you must check **"Do not send automatic replies."** ☑ **Inside organization** - This is an option in "**Out of Office Assistant**" and when this is checked, the system will not reply to any **Email** message coming from **Inside** the **Organization**. ☑ **Outside organization** - This is an option in "**Out of Office Assistant**" and when this is checked, the system will not reply to any **Email** message coming from **Outside** the **Organization.** **Turn off Out Of Office Assistance** - Click in the lower-left corner of the screen to turn off the **Out of Office Assistance** or turn it off in the ***File Tab***.
2.45 Outlook Rich Text (RTF)	This message format is one that previous versions of **Outlook** as well as client programs using the **Microsoft Exchange** Server understands. It supports text formatting, such as bullets, linked objects, and alignments.
2.46 Global Address List	The **Global Address List** is pulled off the entire company **Email** list from the **Microsoft Exchange** server. 

Part

Chapter 3 - Receiving Email

In this chapter, we will discuss receiving **Email** and the overall organization of **Email**.

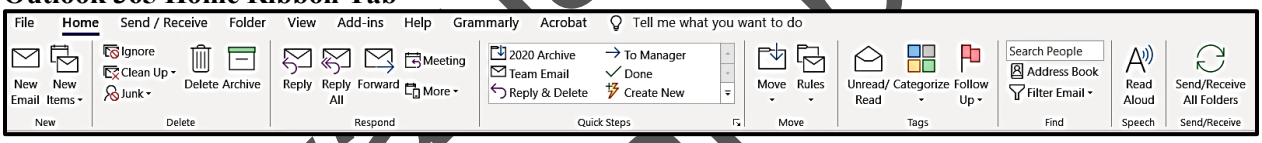


Chapter Table Of Concepts

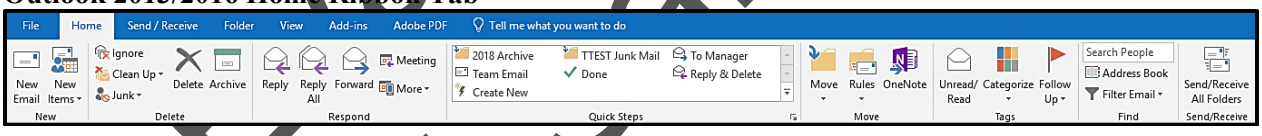
[Section 1: Home Ribbon Tab](#)
[Section 2: View Ribbon Tab](#)
[Section 3: Advanced Receiving Email Options](#)
[Section 4: Exchange Features](#)

Section 1: Home Ribbon Tab

Outlook 365 Home Ribbon Tab

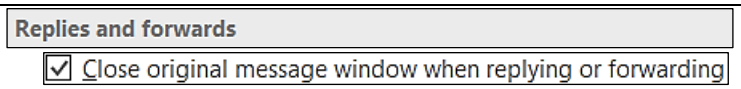


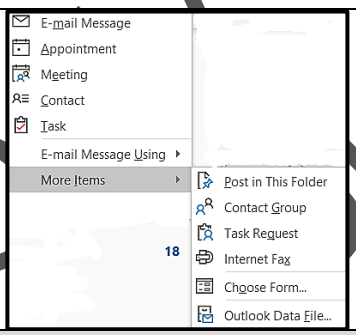
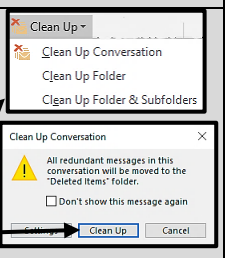
Outlook 2013/2016 Home Ribbon Tab

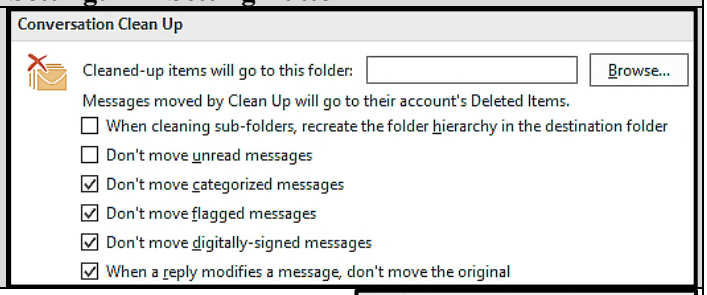
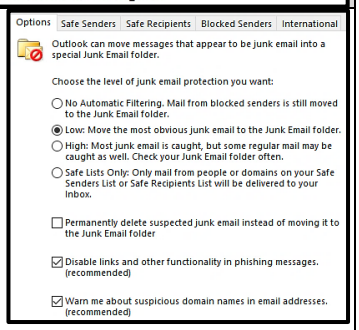


Concept	Explanation / *Command string in italic.*
3.1 Message Window	When you double-click on an **Email** message, the **Message Window** opens. After reading the message, you can either close the **Message Window** or open another message. When you reply within the **Message Window**, it remains open. The following option will close the message window when you reply to a message. ***File Tab →Options →Mail Tab →*** ☑ Close original message window when replying or forwarding
Practice Exercise 3.1 Message Window	1. ***File Tab →Options →Mail Tab →Uncheck the following:*** Replies and forwards ☐ Close original message window when replying or forwarding 2. ***Open an existing Email Message →Message Ribbon Tab →Respond Group →***  ***Reply.*** 3. ***Notice the Message window remains open behind the replied message and you must click***  ***in the upper right corner to close it.*** 4. ***File Tab →Options →Mail Tab → Check the following:***

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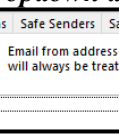
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<tr><td></td><td>

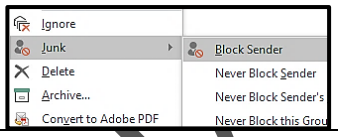
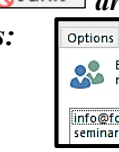
5. Open an existing Email message→Message Ribbon Tab→Respond Group→  Reply.
6. Notice the Message window closes when you Reply.</td></tr>
<tr><td>3.2 New Email</td><td>This creates a New Blank Email.</td></tr>
<tr><td>3.3 New Items</td><td>This creates a New Items such as one of the following Items.

</td></tr>
<tr><td>3.4 Ignore Conversions </td><td>This can be used if you no longer want to receive conversation messages. By checking this option, all past, present, and future messages will be moved to the deleted items folder. Select the conversations→Home Ribbon Tab→Delete Group →  Ignore. Tip: Use this with caution.</td></tr>
<tr><td>3.5 Clean Up Conversation </td><td>This will remove all duplicate Emails except the last Email that contains the full Conversation.
1. View Ribbon Tab→Arrangement Group→  Date→  Show Conversation→Select the desired conversation.
2. Home Ribbon Tab→Delete Group→  Clean-Up→ Clean-Up conversation
3. Clean-Up Button→  .


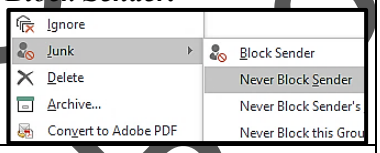
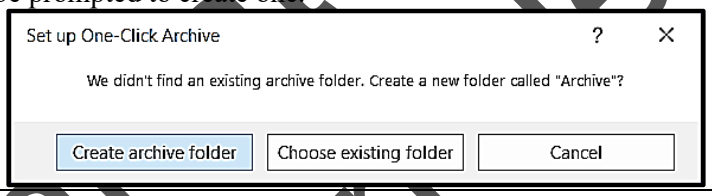
Conversation Cleans Up Setting: The Setting Button will define exclusion with duplicate Email.
Also, messages in the Sent Items folder will not be affected.
File Tab→Options→ Mail Tab→ Conversation Clean Up:

</td></tr>
<tr><td>3.6 Junk Mail </td><td>This will look for the Email that fits the criteria as Junk Mail and will move it to the Junk Email folder. To change the setting:
Home Ribbon Tab→Delete Group→  Junk drop-down→  Junk Mail Options→ Options Tab:
No Automatic - No Filter
Low-This will catch the most Junk Mail.
High-This will catch some Non-Junk Mail or the Email you need to read.


Safe Senders Only - This will only receive Email from Safe Senders. They can be defined by adding an Email address in the Contacts folder or adding them to the Safe Senders Tab.</td></tr>
</table>

For Participant Only

<table>
<tr><td>3.7 Block Senders</td><td>If you are receiving unwanted Email, you can Block Senders.
Home Ribbon Tab→Delete Group→
Junk dropdown arrow→
Junk Email Options:

Block Senders Email:
Right-click on any Email →Junk→Block Sender.
</td></tr>
<tr><td>3.8 Add Safe Sender</td><td>If a valid Email appears in the Junk folder, you can add it to the Safe Senders list.
Home Ribbon Tab→Delete Group→
Junkdropdown arrow→Junk Email Options:

Never Block Sender:
Right-click on any Email message→Junk→Never Block Sender.
</td></tr>
<tr><td>3.9 Delete
</td><td>This will  Delete a selected item.</td></tr>
<tr><td>3.10 Archive
</td><td>This will move a selected Email to the Archive folder. If you don’t have one, you will be prompted to create one.
</td></tr>
<tr><td>3.11 Reply
</td><td>This drops any attachments and Replies to the sender of an Email. It can be done from the Home Ribbon Tab if you open the Email, or you can also Right-click on an Email message. The subject will display an RE: in the subject line.
Tip: Keyboard Command Ctrl R keys - Reply to an Email.
</td></tr>
<tr><td>3.12 Reply All
</td><td>This will Reply to All recipients on the TO or CC lines. This should be used sparingly.
Tip: Keyboard Command Alt L keys - Reply to All.
</td></tr>
<tr><td>Practice Exercise 35 Challenge Question</td><td>If you cc 20 people and all 20 people perform a Reply All, how many messages will be floating across the internet including your Email?
The Answer is upside down: 0ᄀᄀ. Use “Reply All” sparingly.</td></tr>
<tr><td>3.13 Forward
</td><td>This is used to include an attachment Sent to the same sender or another recipient. It will display FW: in the subject.
Tip: Keyboard Command Ctrl F keys - Forward an Email.
</td></tr>
<tr><td>Practice Exercise 36 Forward</td><td>Continue from the previous practice exercise.
When you receive an Email, test out the Reply, Reply All, and Forward to see which method keeps the attachment.
Answer: The Forward will keep the Attachment and Reply will drop it.</td></tr>
</table>

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Partial Sample Book

3.14 Meeting

This will create a **Meeting** with the person addressed in an **Email** and will place the **Body** of the **Email** in the **Notes** field of the **Meeting Request**.

Tip: You can also drag n drop an **Email** to the **Calendar** icon located in the lower-left corner of the interface.

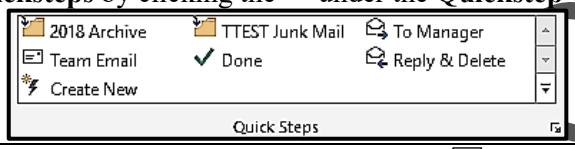
3.15 Forward As Attachment

If an **Email** has an attachment, this will **Forward** it and reattach the file.

More→ Forward as Attachment

3.16 Quick Steps

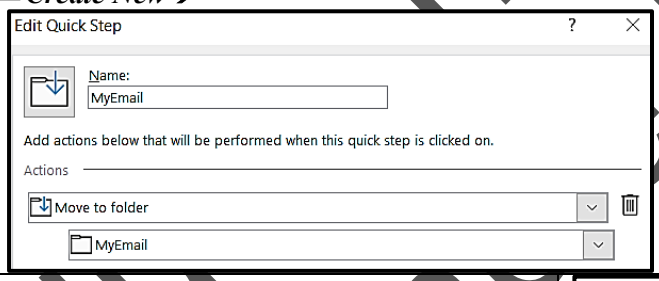
Quick Steps are a predefined command used to perform an action quickly. ***Home Ribbon Tab →Quickstep Group →"Move to ?."*** **Tip:** You can create custom **Quicksteps** by clicking the under the **Quickstep *Group*.**



Practice Exercise 37
Move To Folder

Home Ribbon Tab →Quickstep Group → ***Dropdown arrow →***

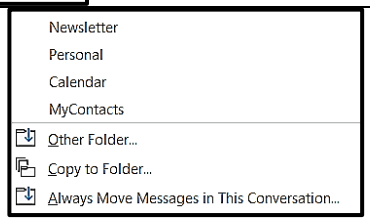
Create New →



3.17 Move

Move

This will **Move** a selected **Email** to a specific folder in the **Navigation Pane**. Use the **Shift** and the **Ctrl** keys to select multiple **Emails** and drag n drop them to the appropriate **Folder**.



Practice Exercise 38
Move To Folder

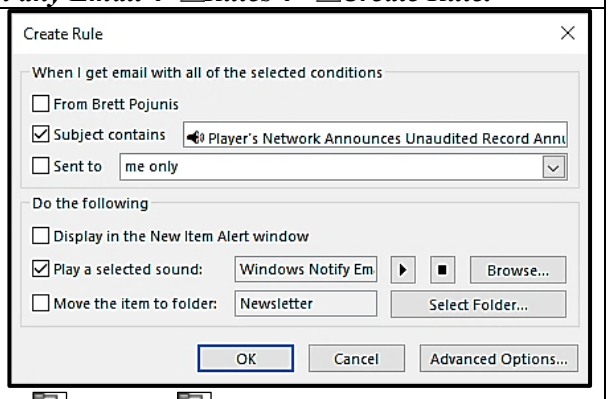
Select the Email in the Inbox →Drag the Email to the MyEmail folder.

3.18 Create Rule

This is a simple way to **Create** a **Filter** on incoming messages in order to process them automatically. ***Right-click on any Email →Rules →Create Rule.***

Practice Exercise 39
Create Rule

Rule1: ***Right-click on any Email →Rules →Create Rule →***
Subject contains: Time Magazine →
Play a selected sound: Windows Notify.wav.
Tip: The **C:\Winsows\Media folder** usually contains additional sounds.



Rule 2: ***Right-click on any Email →Rules →Create Rule →***
From →Move the item to folder →Choose folder.

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3.19 Manage Rules And Alerts

This provides a more advanced way to **Filter** incoming **Email**.

Right-click on Email → Rules → Manage Rules and Alerts.

Tip: Home Ribbon Tab → Rules dropdown arrow → Manage Rules and Alerts.

Practice Exercise 40
Manage Rules An Alerts

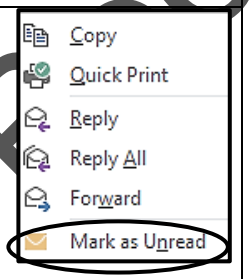
1. ***Right-click on Email → Rules → Manage Rules and Alerts.***
2. ***New Rule →*** Apply rule on messages I receive → Next >.
3. with specific words in the subject ***→Specific Words: PC Weekly, Newsletter, Tips, and Tricks →*** Next > ***→***
4. ***Move a copy to a specified folder →Specified Folder: Newsletters →*** Next >
5. ***No Exceptions →*** Next > ***→Name: Newsletters →*** Finish.

3.20 Mark As Unread

Unread/ Read

When you receive a message, it is **Marked As Unread** and formatted as bold until you read it. You can change the **Read** status of a message by manually **Marking it As Read or Unread.** This is useful if you receive a message that you don't have time to **Read** immediately. You can mark is as **Unread** when you return to **Read** your **Email**.

Tip: Keyboard Command **Ctrl Q** keys - **Mark as Read.**
Keyboard Command **Ctrl U** keys - **Mark as Unread.**



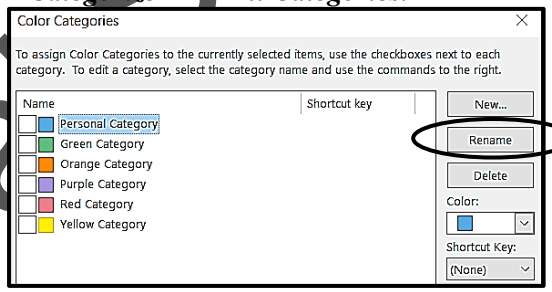
Practice Exercise 41
Categories1

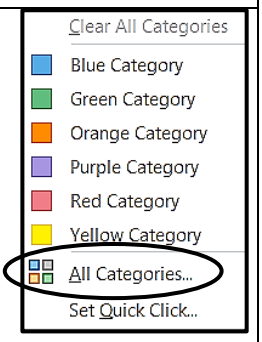
Right-click on a message →Mark as unread.
Tip: You can also click on the ***Home Ribbon Tab →Tabs Group →*** ***Unread/Read Button.***

3.21 Categories

Email can be assigned or filed into **Categories** in order to organize all **Email**.

View Ribbon Tab →Tabs Group →Categorize.
These categories can be customized, renamed, and recolored:
View Ribbon Tab →Tabs Group →
Categorize →All Categories.





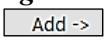
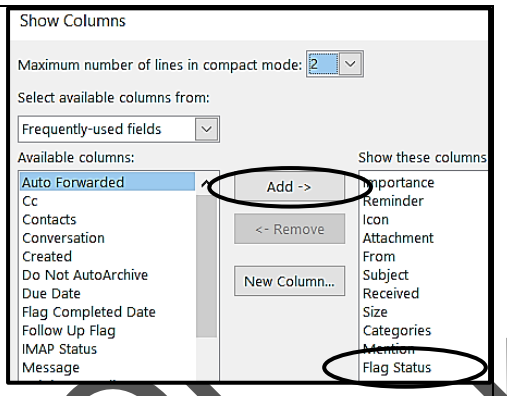
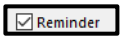
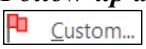
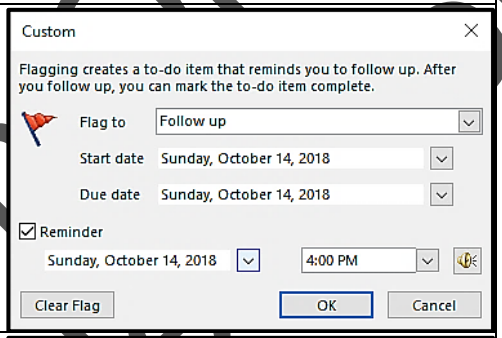
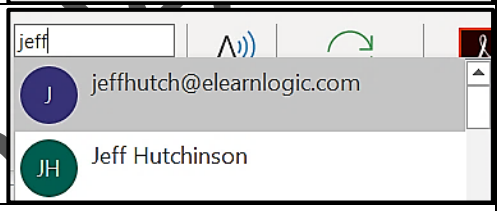
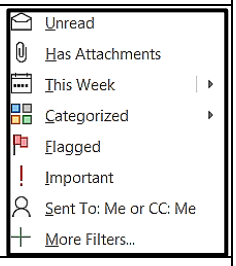
Tip: You can also assign a **Keyboard Shortcut Key** to a **Category**.

Tip: Outlook 2010: ***View Ribbon Tab →Arrangement Group →Categories***.

Practice Exercise 42
Categories2

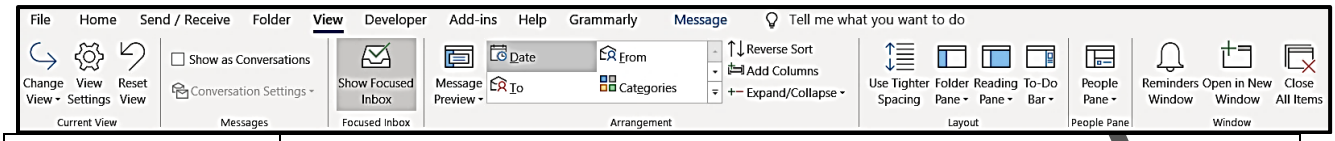
1. ***Open an existing Email message →Message Ribbon Tab →Tabs Group →***
Categorize dropdown arrow →Choose Purple.
2. ***Message Ribbon Tab →Tabs Group →***
Categorize dropdown arrow →Choose All Categories.
3. ***Rename the Blue Category to Personal Category.***

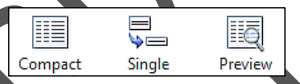
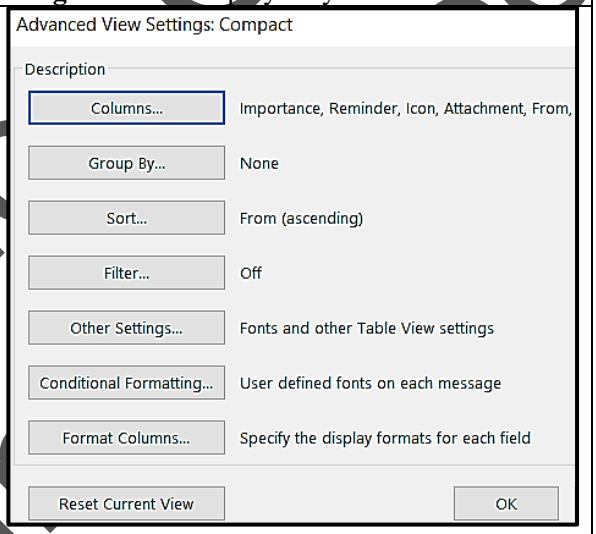
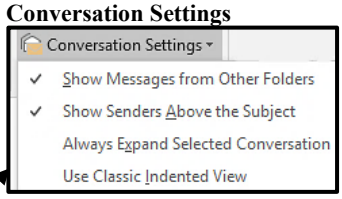
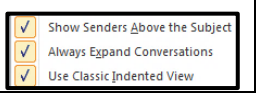
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3.22 Flagging 	This is a way to identify an important **Email**. It is usually located on the far-right side of an **Email** list and initially looks like a ghost icon . After selecting, it turns red . **Tip: If it is not located on the right side:** ***View Ribbon Tab → Current View Group →***  ***View Settings →***  ***→Select the Flag Status if necessary and press the***  ***Button →The Flag Status should be to the right side.***	
3.23 Flagging With Reminder 	***Home Ribbon Tab →Tags Group →*** ***Follow-up dropdown***  ***→***  ***→Fill out the form to remind you when to follow-up.*** **Tip:** This creates a **Task** in order to remind you when it is due.	
3.24 Search People 	This will **Search** your **Address Book** for existing **Email** based on a **Keyword Search**.	
3.25 Address Book 	This will provide access to available **Names, Email,** and **Contact** information. **See Chapter 2 Section 1 for details.**	
3.26 Filter Email 	This will **Filter** the current **View** based on one of the following **Filter** techniques:	
3.27 Send/Receive All Folders 	This will retrieve a **New Email** from the mail server.	

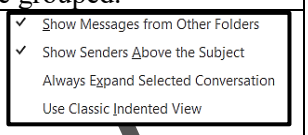
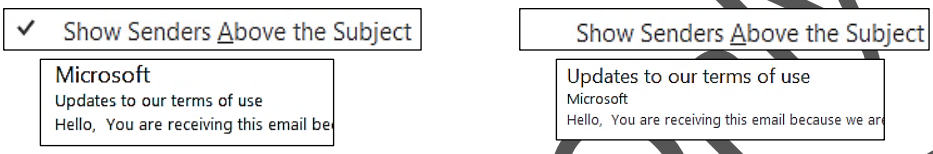
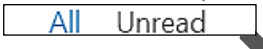
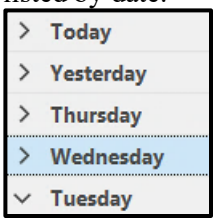
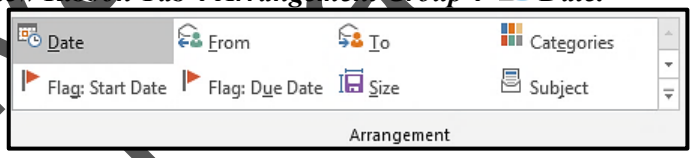
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Section 2: View Ribbon Tab



Concept	Explanation / *Command string in italic.*
3.28 Change Views	***View Ribbon Tab →Current View Group →***  ***Change View.*** **Compact -** This will tighten up your **Email** to fit more on a single screen. **Open In New Window.** **Single -** This will display your **Email** messages with a small space between **Emails** for reading purposes. **Preview -** This will remove the **Reading Pane** and display all your **Email**. 
3.29 View Settings 	**Columns** - This will add or remove **Column Labels**. **Group By** - This will set the default display **Grouping** of **Email**. **Sort** - This will set default **Sorting** when **Outlook** is opened. **Filter** - This will eliminate specific **Emails** by **Filtering**. **Other Settings** - This will format the look, layout, and font size displayed in the **Email** window. **Conditional Formatting** - This will format all **Email** under specific **Conditions**. **Format Columns** - This will format the **Columns**. **Reset Current View** - This will **Reset** all changes made in the **View Settings** to the original default state.  This is the same as the ***View Ribbon Tab →Current View Group →***  ***Reset View***
3.30 Reset View 	This will **Reset** all changes made in the **View Settings** to the original default state.
3.31 Show As Conversation 	**Conversations** are several **Emails** that have been forwarded and replied to while discussing an issue. This is sometimes referred to as a **Thread** and **Outlook** will keep these together. 1. ***View Ribbon Tab →Message Group →***  ***Show as Conversations*** ***Conversation Settings.*** **Conversation Settings**  **Tip: Outlook 2010:** ***View Ribbon Tab →Arrangement →*** ***Show as Conversations →Conversation Settings.*** 

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Practice Exercise 43 Conversation	***Send your neighbor an Email→The neighbor will then Reply to the Email →*** ☑ ***Show as Conversation.*** **Tip**: As you reply multiple times, all of these **Emails** will be grouped.
3.32 Conversation Settings 	✓ **Show Messages from Other Folders -** This will include other folders that are part of this conversation.  ✓ **Show Senders Above the Subject -** Example as follows:  ✓ **Always Expand Selected Conversation -** When you refresh a folder by clicking on another folder and then returning to the **Conversation** folder, it will always expand to show the entire **Conversation.** ✓ **Use Classic Indented View -** This will override several of the options above including **Expanding Selected Conversation.**
3.33 Show Focused Inbox 	This will change the title on top of the **Email** list. **Focused Index Off (not highlighted)**  **Focused Index On (highlighted)** 
3.34 Message Preview 	This will display 1, 2, 3 lines of the information of incoming email under the title. **See Chapter 1 Section 2 for more details.**
3.35 Arrangement	This is a quick way to layout or **Group Email** to view it by specific **Arrangements**. The **Date Arrangement** seems to be the most popular. **Tip: Date Arrangement - Email** will be listed by date. 
Practice Exercise 44 Arrangement	***View Ribbon Tab→Arrangement Group→*** ***Date.***  If the **Arrangement** above does not **Arrange Email** in groups (similar to the **Date** to the left), then turn on the following: ***View Ribbon Tab→Current View Group→View Settings→Group→***  **Tip: In Outlook 2013**: ***View Ribbon Tab→Arrangement Group→Arrange By→ Date.***
3.36 Reverse Sort 	This will **Reverse** the **Sort** of a column from ascending to descending order using a table layout **Arrangement.** You can also click on the **Column Label** to reverse the sort of a field.

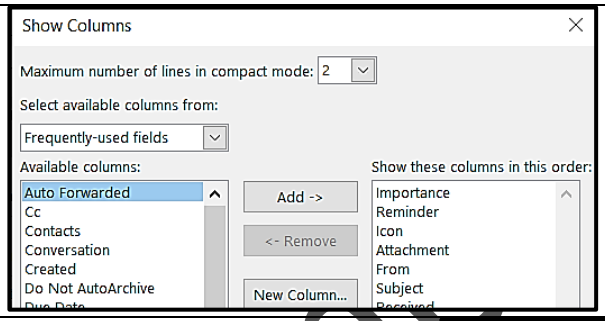
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3.37 Add Columns



This opens the **Show Columns** interface to add additional **Columns**.

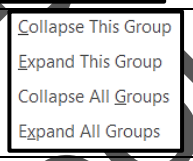
Tip: You can also:
Right-click on any Label→ Field Chooser.



3.38 Expand /Collapse



This will **Expand/Collapse** an **Arrangement** based on the following options.

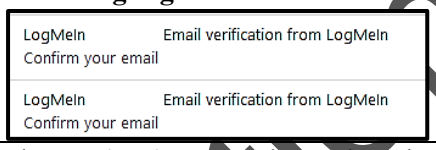


3.39 Use Tighter Spacing

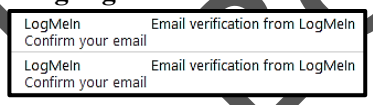


This will **Tighten** the distance between **Email** messages.

Not Highlighted/Not Selected



Highlighted or Selected



3.40 Folder Pane



This is the **Navigation Pane** located on the left of the **Tri-Pane** layout.

Refer to Chapter 1 Section 1 for more details.

3.41 Reading Pane



This is located to the right or bottom of the selected **Email** in the **Email Pane**.
Refer to Chapter 1 Section 1 for more details.

3.42 To-Do Bar

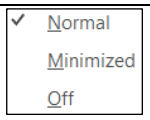


This is located on the right side of the **Tri-Pane** layout and opens a **Mini-Calendar**, **Contacts,** and **Task Pane**.
Refer to Chapter 1 Section 1 for more details.

3.43 People Pane

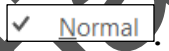


This will display the **People Pane** in the **Reading** window view. You must have the **Reading Pane** window in either the right or bottom position in order for it to be active.



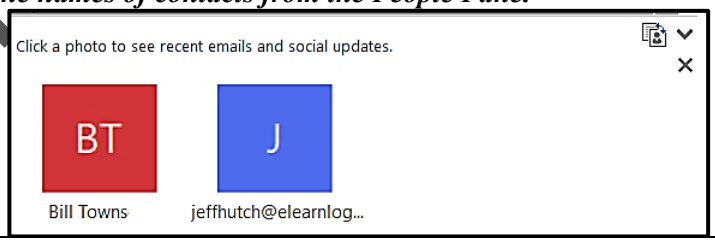
Practice Exercise 45

1. ***View Ribbon Tab→Layout Group→Reading Pane drop-down→ Choose Bottom or Right.***

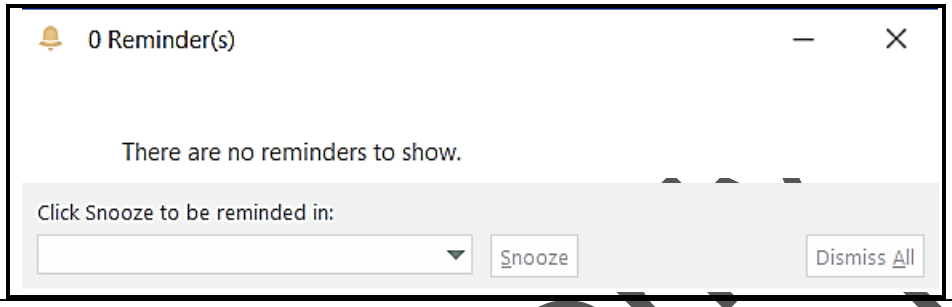
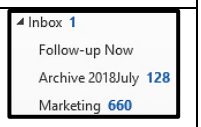
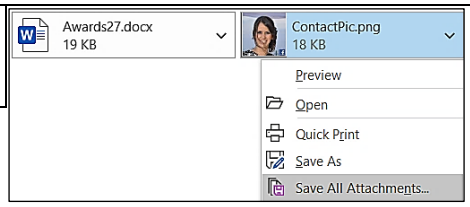
2. ***View Ribbon Tab→People Pane Group→***  ***People Pane dropdown arrow→*** 

.

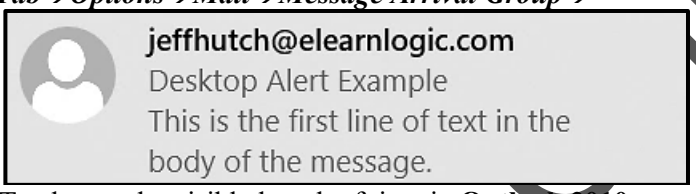
3. ***In the Reading Pane view→Click***  ***icon→the selected Email will display the names of contacts from the People Pane.***



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3.44 Reminders Window 	If there are active **Reminders** defined, then the **Reminders** pop-up windows will appear when a **Reminder** is due. 
3.45 Open In New Window 	This will **Open** any **Selected Folder** in a **New Window** so you can display them side-by-side. ***Select a folder or Email in a folder→View Ribbon Tab→ Windows Group→***  ***Open In New Window.***
3.46 Close All Items 	This will **Close** any **Opened Email** or any **Item Opened** in **Outlook**.
Practice Exercise 46 Close All Items	***Double-click on any Email to Open it→View Ribbon Tab→ Windows Group→***  ***Close All Items.***
3.47 Create Folders 	**Folders** can be created almost anywhere, but an **Inbox** is the most common location. 
Practice Exercise 47 Create Folder	***Right-click on the Inbox folder (located in the left Navigation Pane)→***  ***New Folder→ Name: MyEmail.***
3.48 Saving A File Attachment	If you receive a message with an **Attachment**, you can open it and edit it as needed. When finished, be sure to save it to another filename in a different folder for permanent storage.
Practice Exercise 48 Save Attachment	1. ***Send an Email to yourself and attach file Newreps.docx located in C:\Data\Outlook365-1\Newreps.docx.*** 2. ***When you receive the file, double-click on the Attachment→File Tab→ Save As: MyNewReps.docx.***
3.49 Save All Attachments	When you receive an **Email** with multiple attachments, you have the option to **Save All Attachments** at the same time.  ***Or Press the dropdown arrow above.***
Practice Exercise 49 Save All Attachments	***Open Email with multiple Attachments→ Select one Attached file→ Attachments Ribbon Tab→***  ***Save all attachments Button.***

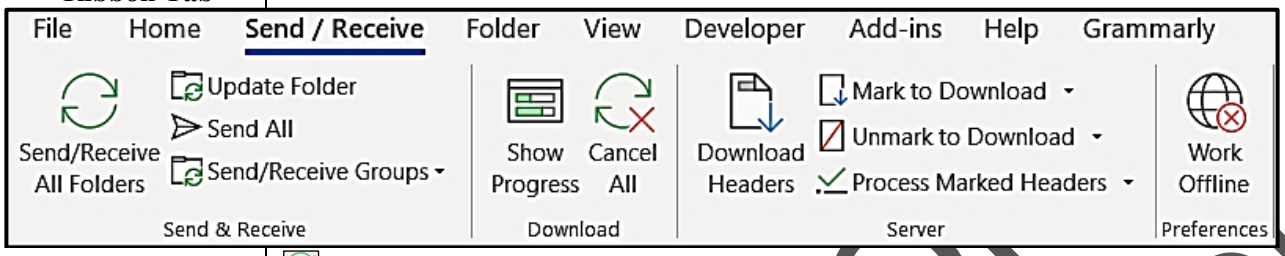
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3.50 Desktop Alert	A **Desktop Alert** is a semi-transparent message box that appears in front of the current window for a few moments when a new **Email** message is received, a **Meeting** request in the **Calendar** is due, or a **Task** request is due. The **Desktop Alert** announces who the item is from and the subject. Clicking the **Desktop Alert** opens an item. One reason why you would want to turn this option off is if you're connecting in a remote meeting and don't want your **Personal Message** and **Calendar** announcements displayed. ***File Tab →Options →Mail →Message Arrival Group →*** ☑ Display a Desktop Alert.  **Tip**: This feature is not supported on an **iPad** device. **Tip:** To change the visible length of time in **Outlook 2010**: ***File Tab →Options →Mail Tab →Desktop Alert Settings Button***.
Practice Exercise 50 Desktop Alert	Send an **Email** to yourself and watch for the **Desktop Alert** to pop up. **Verify the Desktop Alert is turned on:** ***File Tab →Options →Mail →Message Arrival Group →*** ☑ Display a Desktop Alert. **Test It:** ***Send a Message to yourself to see the Desktop Alert appear in the lower right corner →Click on the Desktop Alert to open the Email.***

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Section 3: Advanced Receiving Email Options

Concept	Explanation / *Command string in italic.*
3.51 Send/Receive Ribbon Tab	These are **Send / Receive** options. The following is the ***Send / Receive Ribbon Tab.***



Send/Receive All Folders - This will **Send/Receive Email** from all accounts.
Tip: Keyboard Command F9 key.

Update Folder - This will **Send/Receive Email** or items in the selected **Folder**. **Tip**: Keyboard Command Shift F9 keys.

Send All - This will **Send** your message only It can be used if a large **Email** to be received is processing and you only want to send new **Email** out.

Send/Receive Groups - Different mailboxes are organized by **Groups** and each **Group** can be processed independently. Click on the dropdown arrow and choose **Define Send/Receive Groups** to specify the **Automatic Send/Receive** options.

Show Progress - This will open the dialog box to show **Send/Receive Progress.**

Cancel All - If the **Send/Receive** is taking too long, it can be **Cancelled**.

Download Headers - This will **Download** and display only **Email Headers,** including the sender and subject of an **Email**.

Mark to Download - This allows you to **Mark** specific **Email** to be **Downloaded**. It is useful if large **Emails** are preventing you from **Downloading** critical smaller ones.
Tip: Keyboard Command Ctrl Alt M keys.

Unmark to Download - This will **Unmark** the **Download**.
Tip: Keyboard Command Ctrl Alt U keys.

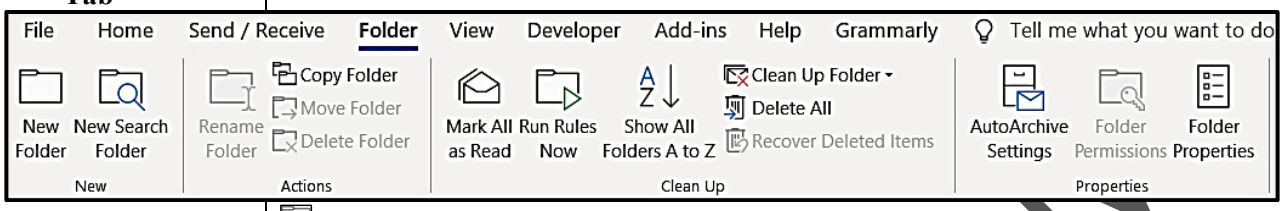
Progress Marked Headers - This displays **Progress** of **Marked Headers** being downloaded.

Work Offline - This will prevent new **Email** from being downloaded.

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3.52 Folder Ribbon Tab

These are **Folder** related options. ***Folder Ribbon Tab.***



New Folder - This will create a **New Folder** from a selected **Folder** in the **Navigation Pane**. **Tip**: you can also **Right-click** any folder in the **Navigation Pane** and choose **New Folder**. **Tip**: Keyboard Command **Ctrl** **Shift** **E** keys.

New Search Folder - A **Search Folder** will display **Email** with a **Filter** applied to it such as **Unread Email** or a **Custom Search**. **Tip**: You can also **Right-click** on the **Search Folders** in the **Navigation Pane**.
Tip: Keyboard Command **Ctrl** **Shift** **P** keys.

Rename Folder - This will change the name of a selected **Folder**. Also, you can **Right-click** on any **Folder** to **Rename** it.

Copy Folder - This will **Copy** a selected **Folder** to a different location in the Navigation Pane.

Move Folder - This will **Move** a selected **Folder** to a different location in the **Navigation Pane**.

Delete Folder - This will **Delete** a selected **Folder**.

Mark All As Read - This will **Mark All Message As Read** or format as **Non-Bold**

Run Rules Now - This will apply or **Run Rules** in your current mailbox.
See Appendix A for more details.

Show All Folders A to Z - This will **Display All Folders** in alphabetical order.

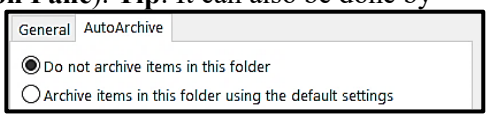
Clean Up Folder - This will remove redundant **Conversations** in a selected **Folder**.

Delete All - This will **Delete All** items in a selected folder.

Recover Deleted Items - This will **Recover** or move **Deleted Items** back to an original folder.

Add to Favorites - This will place a shortcut of the **Folder** in the **Favorites Area** (located in the top of the **Navigation Pane**). **Tip**: It can also be done by **Right-clicking** on any **Folder**.

AutoArchive Settings - This will open the **AutoArchive Dialog Box**.



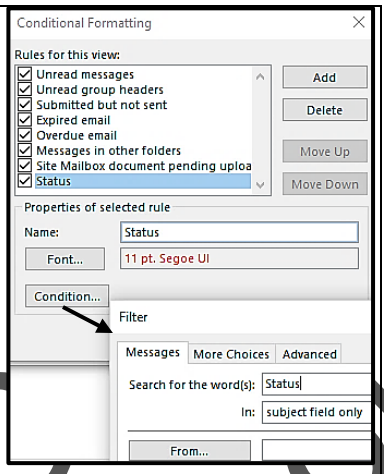
File Tab → Options → AdvancedTab →  ***button.***

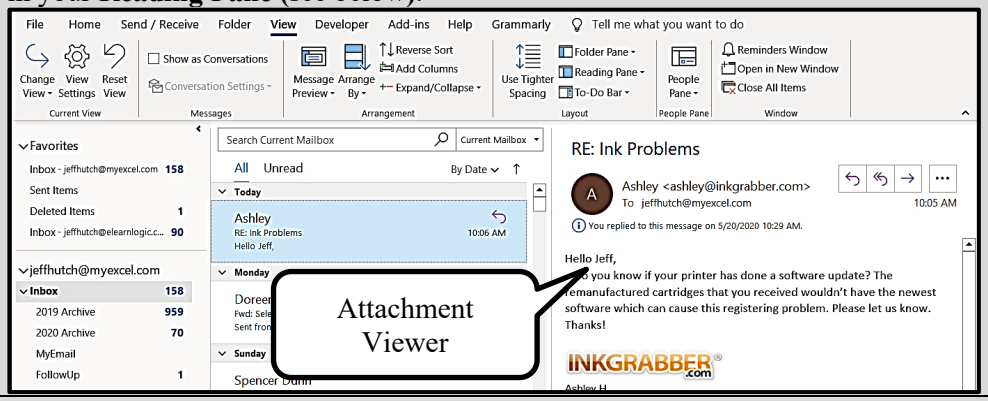
Folder Permissions - This will allow you to view and edit the sharing **Permissions** for a selected **Folder**. **Tip:** You must be connected to an **Exchange Server**. **Tip**: You can also **Right-click** on any **Folder** below.

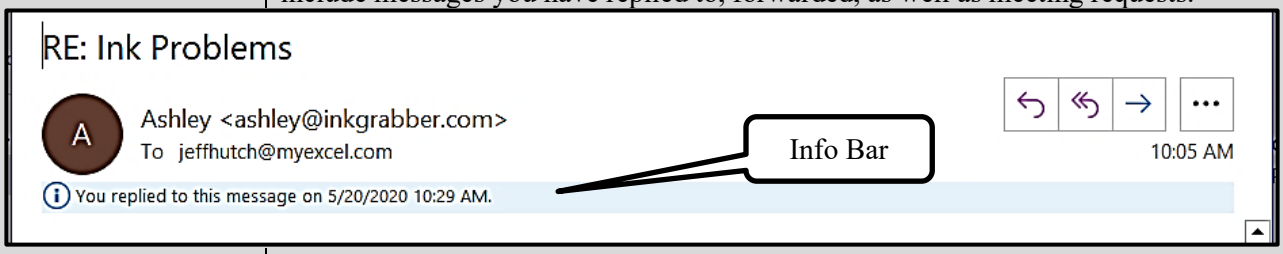
Folder Properties - This will open the **Properties** for a selected **Folder**.

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3.53 Conditional Formatting	This allows you to change the color and format of incoming **Emails**. ***View Ribbon Tab →Current View Group →*** ***View Settings →Conditional Formatting.***
Practice Exercise 51 *Conditional Formatting*	1. ***View Ribbon Tab →Current View Group →*** ***View Settings →Conditional Formatting →*** Add. 2. **Name:** ***Status*** 3. **Font:** ***Color: Red*** 4. ***Condition Button →*** ***Search for the words: Status →*** **In:** ***Subject Field Only →*** OK → OK. 5. ***Start a New Email →*** **To:** *(send to yourself)* **→** **Subject:** ***Status →*** ***Message area: This is a status test Email → Send*** .
3.54 Attachment Viewer	The **Attachment Previewer** allows you to view the contents of a **File Sent** to you in your **Reading Pane** (see below).
3.55 InfoBar	The **InfoBar** appears at the top of messages that you have acted on. These actions include messages you have replied to, forwarded, as well as meeting requests.
Practice Exercise 52 *Infobar*	***Open several messages in your Inbox and review the Infobar and message contents.***







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3.56 Hiding and Displaying Header Fields	By default, the **To**, **Cc** (**Carbon Copy**), and **Subject** fields appear in the message header within the Message window. Fields are boxes that contain specific pieces of information such as a message recipient's name. You can add the **BCC (Blind Carbon Copy)** and **From** fields to the message header, if desired. When you add names to the **BCC** field, all recipients in the field receive a message, but do not see other names in the **BCC** field.
Practice Exercise 53 Bcc	***Inbox Pane→ New Email→Options Ribbon Tab: Click Bcc button.*** 
3.57 Email Icons **Outlook 2010**	**Outlook 2010 Icons** are displayed to the left of the **Email** in the Icon column. The following are the most common Icons displayed: **Unread Email** **Read Email** **Attachment** **Forward** **Replied** **Read Receipt Failed** **Read Receipt Complete** **Meeting Request accepted** **Digital Signature attached to Email** **Assigned Task**

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Partial Sample

Section 4: Exchange Features

Exchange is an **Email** server used in conjunction with **Outlook**.

Concept	Explanation / *Command string in italic.*
3.58 How To View Public Folders Using The Folder List	**Public** folders are centralized in order for everyone to access the **Exchange** server. ***Click in the lower-left corner of the screen on the folder list icon***  ***→Scroll down in the folder list until you see the Public Folder.***

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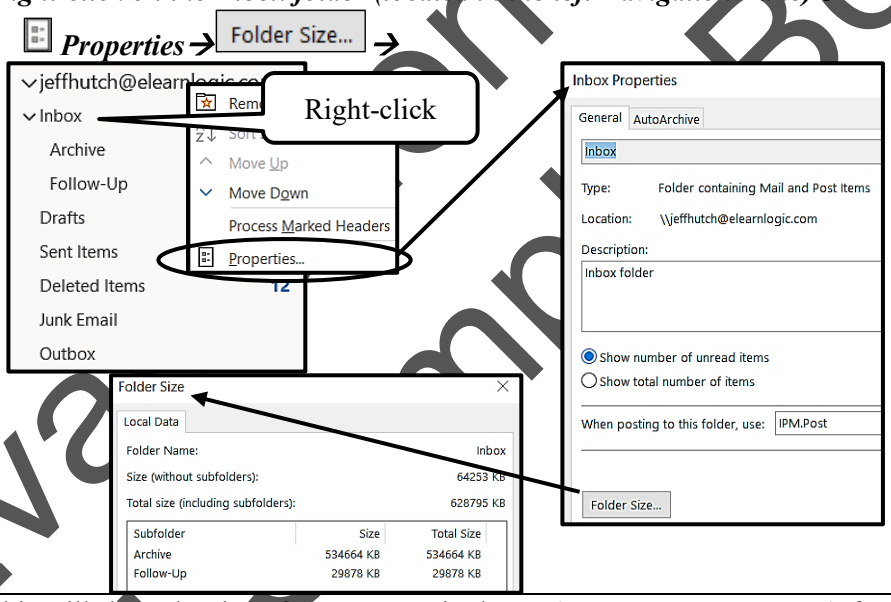
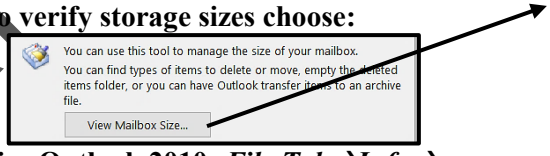
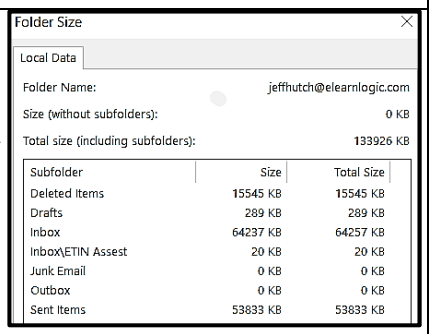
Chapter 4 - Email Management

Understanding the interface and some of the advanced features is key to using the program effectively.

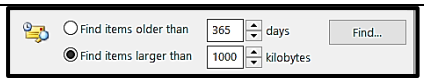
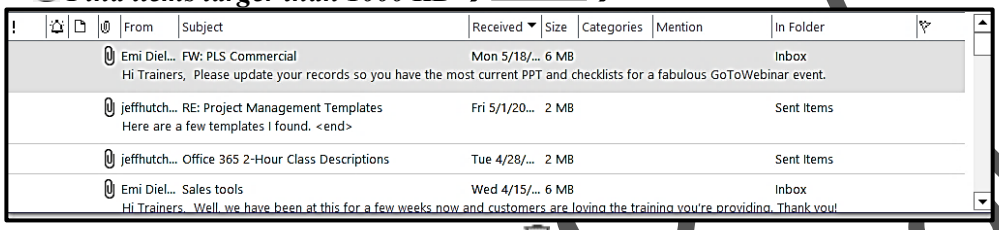
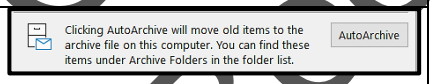
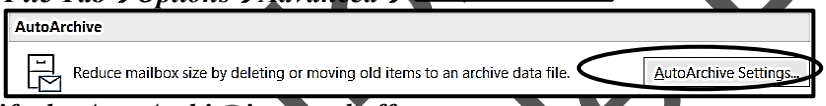
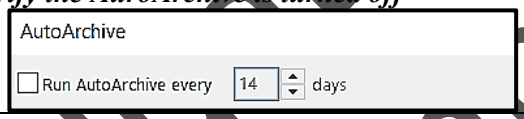
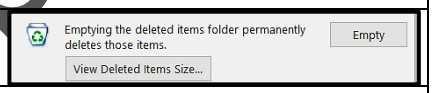
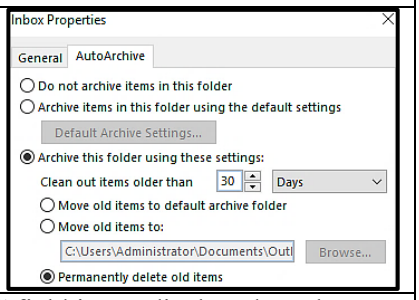
Chapter Table Of Contents

[Section 1: Core Concepts]
[Section 2: Exchange Features]

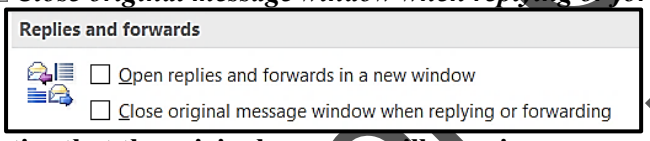
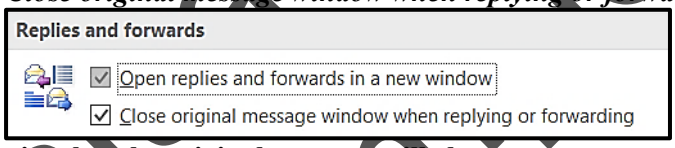
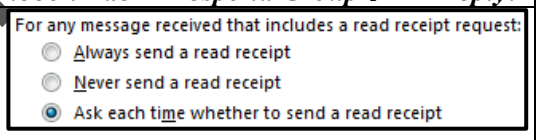
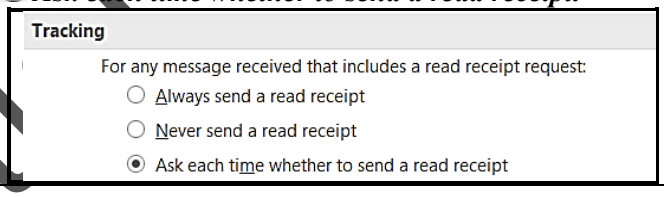
Section 1: Core Concepts

Concept	Explanation / *Command string in italic.*
4.1 Folder Storage Size	Email folders can grow in **Size** due to attachments and graphics images. It is easy to check the **Folder Size** by **Right-clicking** on the **Folder** and choosing **Properties**.
Practice Exercise 54 Folder Size	To check the **Folder Storage Size:** ***Right-click on the Inbox folder (located in the left Navigation Pane)*** → ***Properties*** → Folder Size... → 
4.2 View Mailbox Size	This will show the size of **All Folders** in the **Mailbox**. To remove **Email** from **Deleted Items** or **Junk Email**, **Right-click** on a **Folder** and choose **Empty Folder**.
Practice Exercise 55 Mailbox Size	This will display **All Mailbox Folder Sizes.** ***File Tab*** → ***Tools*** → ***Mailbox Cleanup.*** **To verify storage sizes choose:**   **Tip: Outlook 2010:** ***File Tab → Info → Cleanup Tools → Mailbox Cleanup.*** **Another way to check the Mailbox size:** ***Right-click on the top folder (located in the left Navigation Pane) such as:*** jeffhutch@elearnlogic.com → ***Data File Properties*** → Folder Size... → ***Local Data Tab.***

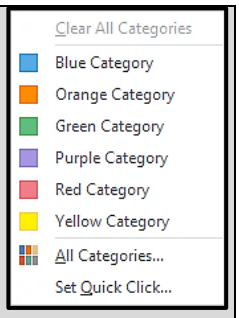
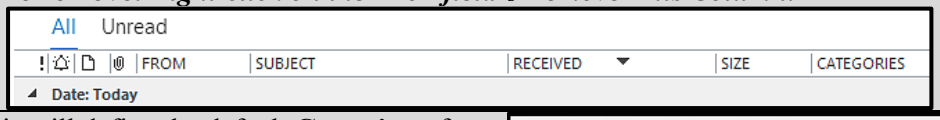
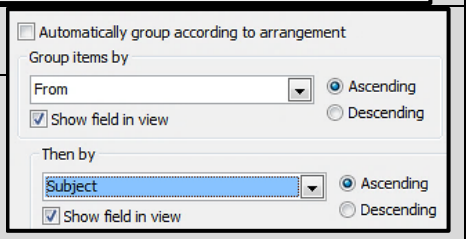
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4.3 Find Emails	This will allow you to **Search** for a specific sized email or older **Emails** in order to remove them.
Practice Exercise 56 *Find Emails*	This will **Search** for files older than one **Year** or sizes greater than one MB:  1. ***File Tab →*** ***Tools →*** ***Mailbox Cleanup →*** ◉ ***Find items larger than 1000 KB →*** Find... →  2. **To Delete:** ***Select Items →Right-click →*** ***Delete.***
4.4 AutoArchive	This will run the **AutoArchive** feature by clicking the AutoArchive Button. 
Practice Exercise 57 *AutoArchive*	**The AutoArchive Options can be changed in:** ***File Tab →Options →Advanced →*** AutoArchive Settings...  ***Verify the AuroArchive is turned off*** 
4.5 View Deleted Items Size	This will **Empty** the **Deleted Items** folder. 
4.6 Auto Empty Folder	This will **Automatically Delete Email** on a set number of days. It can be done by using the **AutoArchive** feature at the folder level.
Practice Exercise 58 *Auto Empty Delete Items Folder*	Use the **AutoArchive** to **Auto Empty Delete Items Folder** every 30 days. ***Right-click on the Delete Items folder (located in the left Navigation Pane) → Properties →AutoArchive Tab →*** ◉ ***Archive this folder using these settings.*** ***Clean out items older than 30 Days.*** ◉ ***Permanently delete old items.*** 
4.7 Permanently Display The BCC Field	By default, when you start a new **Email,** the **BCC** field is not displayed. To keep this open **Permanently,** choose the **BCC** option in the **Options Ribbon Tab**.
Practice Exercise 59 *Permanently Display The BCC Field*	**To keep the BCC field Permanently available:** ***Home Ribbon Tab →New Email → Options Ribbon Tab →Show Fields Group →Check the***  ***BCC Button.*** **BCC Button** 

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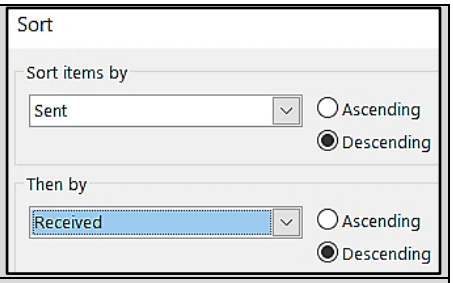
4.8 Always Spell Check	This will go through a **Spell Check** each time you send an **Email**.
Practice Exercise 60 Always Spell Check	This will do a **Spell Check** on each **Email** before **Sending**: ***File Tab →Options →Mail Label → Compose Messages →*** ☑ ***Always check spelling before sending.*** 
4.9 Close Window When Replying	When you open a message and decide to **Reply**, the original message will remain open and you will need to manually close the original message after sending. However, this option will **Close** the original message when you do a **Reply**:
Practice Exercise 61 Reply/Forward	**Make sure the option is turned off:** 1. ***File Tab →Options →Mail Tab →Replies and forwards label →*** ☐ ***Close original message window when replying or forwarding →*** OK  2. **Notice that the original message will remain open:** ***Open an existing message →Home Ribbon Tab →Respond Group →*** ***Reply.*** 3. **Turn on the option: *File Tab →Options →Mail Tab →*** ***Replies and forwards label →*** ☑ ***Close original message window when replying or forwarding.***  4. **Notice that the original message will close:** ***Open an existing message →Home Ribbon Tab → Respond Group →*** ***Reply.***
4.10 Auto-Reply To Read Receipt *Practice Exercise 62 Read Receipt*	You want to make sure you are prompted for **Read Receipt** requests. Otherwise, **Read Receipts** will process without your knowledge:  ***File Tab →Options →Mail Tab →Tracking section label →*** ◉ ***Ask each time whether to send a read receipt.*** 

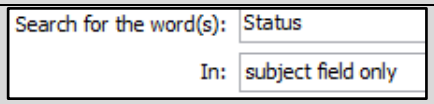
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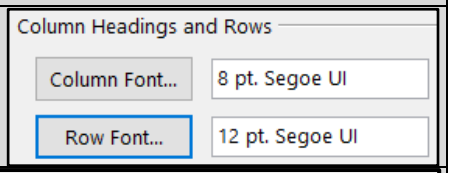
4.11 Categories	**Categories** can be created and assigned to **Email** or tasks in order to define their importance. You might define using Urgent, Information, or by company name to locate the item when needed. 
Practice Exercise 63 *Categorize Email*	1. To **Categorize** and **Email**: ***Select the Email to Categorize →Home Ribbon Tab →Tags Group →*** ***Categorize →(Choose Category).*** 2. **To Sort by Category:** ***Home Ribbon Tab →Find Group →*** ***Filter Email →*** ***Categorized →(Choose Category).***
4.12 Resending A Message	If someone did not **Receive** your **Message**, check the **Sent Items** folder and resend it. Another technique may be to open a sent **Email** in the **Sent Items** folder and press **Forward**. This will add the **Date** the **Email** was originally sent.
Practice Exercise 64 *Resend Email*	***Open the Sent Items folder (located in the left Navigation Pane) →Open the Email to resend →Message Ribbon Tab → Move Group →*** ***Actions →*** ***Resend this message.*** 
4.13 Recalling A Message	This feature will allow you to remove an **Email Sent** from a recipients **Inbox**. If a person has opened the message, it will not **Recall**. Instead, you will receive a message indicating if **Recall** was successful or not. If it was successful, then it **Recalled** the message and removed it from the **Recipients Inbox**.
Practice Exercise 65 *Recall This Email*	1. ***Go the Sent Items folder →Open the message Sent.*** 2. ***Message Ribbon Tab →Move Group →*** ***Actions drop-down →*** ***Recall this message →*** Recall This Message... → OK. 3. ***Close the message, go to the Inbox and wait for the results.***
4.14 Adding Columns	Sometimes columns disappear such as in the **Subject** field. When this happens, these columns/fields can be added using **View Settings**. Another option to use is the **Field Chooser** which can be opened by **Right-clicking** on any **Label/Field Name** within the top of the **Inbox** page.
Practice Exercise 66 *Adding Columns*	1. ***View Ribbon Tab →Current View Group →*** ***View Settings → Columns →*** ***Available Columns: Select "To" field →*** Add -> ***Button.*** 2. **Move the position:** ***Select the*** Move Up ***Button →*** Move Up ***Button →*** OK. 3. **To remove:** ***Right-click on the "To" field →Remove This Column.*** 
4.15 Group By	This will define the default **Grouping** of **Email** when you open **Outlook**. 
Practice Exercise 67 *Group By*	1. **Define the default Grouping of Email:** ***View Ribbon Tab → Current View Group →*** ***View Settings →Group By →Unselect*** ☐ ***Automatically group according to arrangement →*** ***Group items by: From →Then by: Subject →*** OK → OK. 2. **Turn back to Auto:** ***View Ribbon Tab →Current View Group →*** ***View Settings →Group By →*** ☑ ***Automatically Group according to arrangement →*** OK → OK.

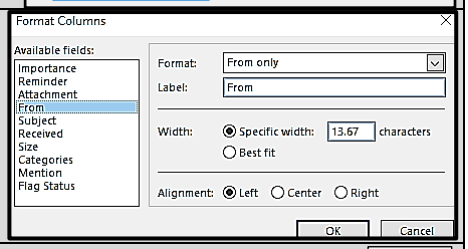
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4.16 Sort	This will define the default **Sorting** of **Email** when you open up **Outlook**.
Practice Exercise 68 Sort Defaults	***View Ribbon Tab →Current View Group →*** ***View Settings → Sort →*** ***Sort items by: Sent →*** ***Then by: Received →*** OK → OK.
4.17 Filter	This will define the default **Filtering** in the Inbox:
Practice Exercise 69 Filter	***View Ribbon Tab →Current View Group →*** ***View Settings → Filter →Search for the words(s): Status →In: subject field only →*** OK → OK. **Reset:** ***View Ribbon Tab →Reset View.***
4.18 Other Settings	This will define the default size of text in the **Inbox**:
Practice Exercise 70 Other Settings	***View Ribbon Tab →Current View Group →*** ***View Settings →Other Settings →Row Font: 12 pt. Segoe UI →*** OK → OK. **Tip:** The default size is usually 8 pt.
4.19 Format Columns	This will **Format** the **Columns** of **Email**:
Practice Exercise 71 Format Columns	***View Ribbon Tab →Current View Group →*** ***View Settings → Format Column →Available fields: Received →*** **Centered →** OK → OK.
4.20 Reset Current View	This will **Reset** the setting back to factory defaults.
Practice Exercise 72 Reset View	**Reset View:** ***View Ribbon Tab →Current View Group →*** ***Reset View.***
4.21 Rule Storage Limit	The storage limit for **Outlook2010/Exchange** is **32KB** which is approximately 60 rules. If you reach this limit, you can delete unused rules and combine them to fit.
4.22 Group By Box	This will create groups similar to the ***View Ribbon Tab →Arrangements Group***. (The **Arrangement** feature can be found in **Chapter 3 Section 1**). ***Right-click on any field →Group By →Then drag the field just above the Labels/Field Names.***

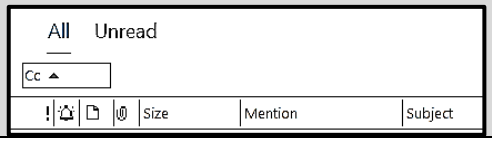




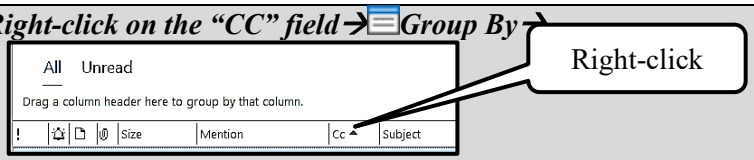
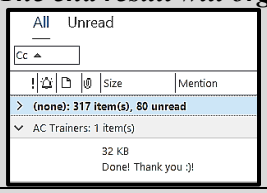
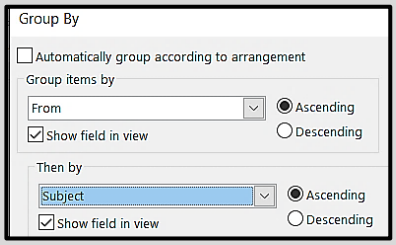
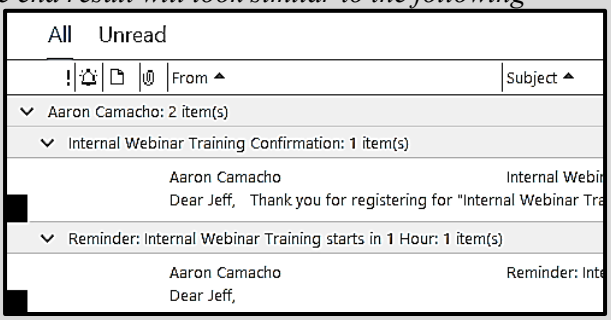
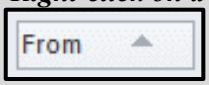
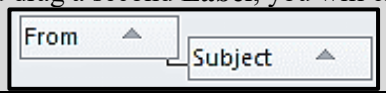


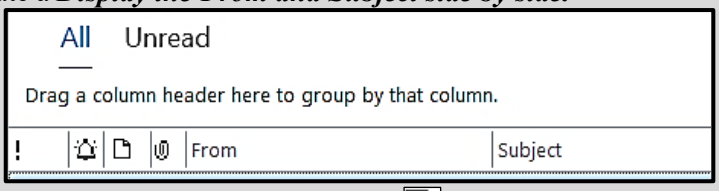
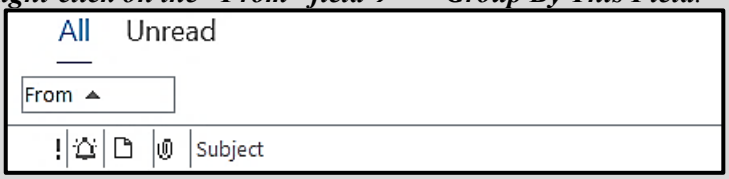
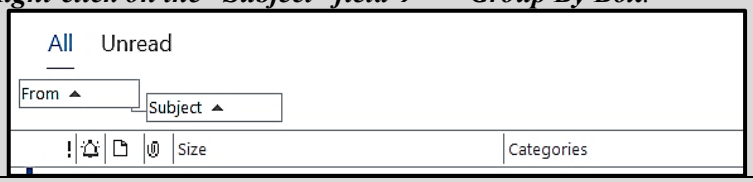
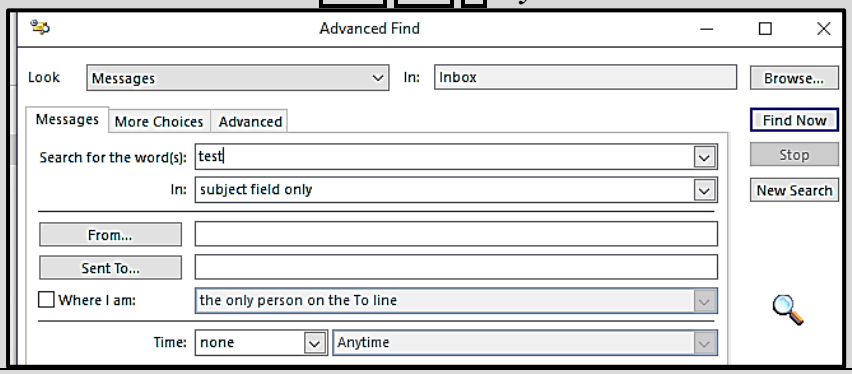
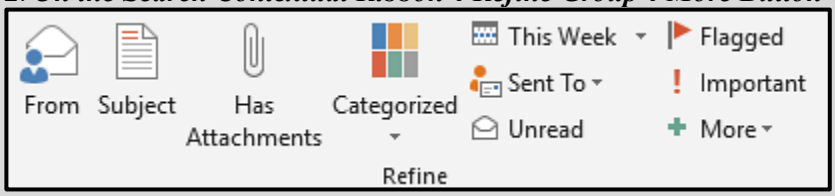


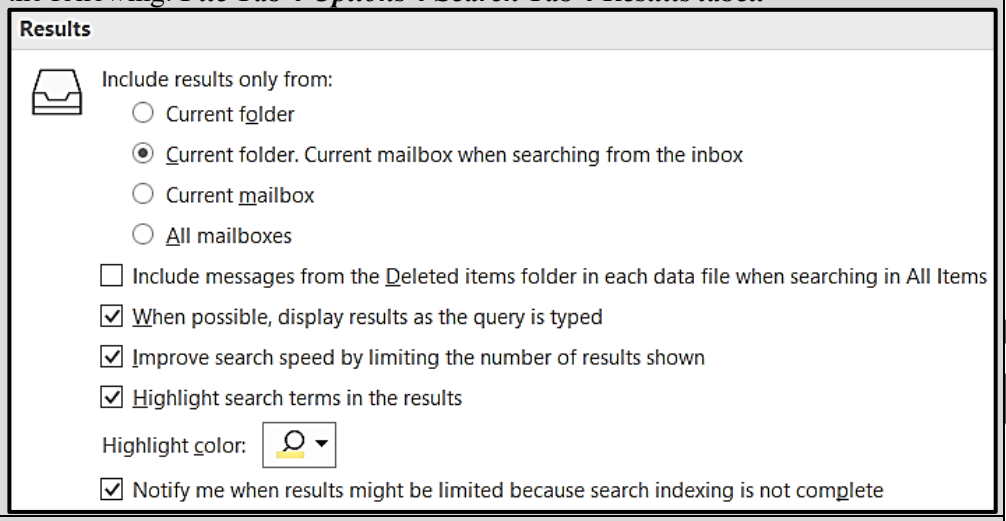
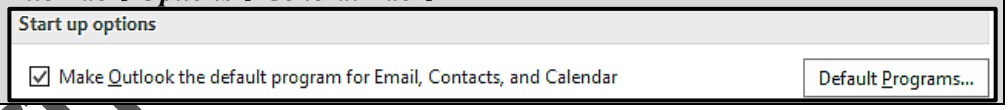




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Practice Exercise 73 *Group By Box*	1. ***Right-click on the "CC" field→Group By→***  2. ***Then drag the CC field into the option below:***  3. ***The end result will organize or Group the email based on the CC field:*** 
4.23 Group By This Field	This allows you to create custom **Groups** and **Subgroups**.
Practice Exercise 74 *Group By This Field*	***View Ribbon Tab→Current View Group→***  ***View Settings→Group→***  **Tip**: To turn this feature off, check the default option of ☑ **Automatically group according to the Arrangement.** *The end result will look similar to the following*  **Tip**: **Another way to accomplish this is to:** ***Right-click on a Label/Field Name→Group By This field.***  If you drag a second **Label**, you will create a subgroup. 

Practice Exercise 75 *Group By Box*	Create a ***Display the From and Subject side by side.***  1. ***Right-click on the "From" field → Group By This Field.***  2. ***Right-click on the "Subject" field → Group By Box.*** 
4.24 Collapse/ Expand Groups	**This relates to the previous concept:** ***Right-click on the group title in the Email area → Collapse all Groups.***
4.25 Advanced Find Multiple Criteria	1. ***Home Ribbon Tab → Find Group →*** Filter Email ***→ More Filters.*** 2. ***On the Search contextual Ribbon Tab → Options Group →*** ***Search Tools →*** ***Advanced Find or*** the **Shift** **Ctrl** **F** ***keys.*** 
4.26 Refine Filter	A **Filter** is different from a sort because it will reduce the amount of information displayed. You can choose multiple criteria to filter the **Email**.
Practice Exercise 76 *Refine Filter*	1. ***Home Ribbon Tab → Find Group →*** Filter Email ***→ More Filters.*** 2. ***On the Search Contextual Ribbon → Refine Group → More Button → Body.***  **Tip**: In **Outlook 2013**: The **Refine Group** name has now become the **Respond Group** in **2013.**

4.27 Indexing Options	**Indexing** will speed up your search. However, make sure your options are set to the following: ***File Tab →Options →Search Tab →Results label.*** 
4.28 Creating An Quick Part Entry	**Quick Parts** are blocks of text that you may wish to frequently use in messages. These blocks can include not just text, but also graphics and logos. **Quick Part** entries are excellent ways to store items such as addresses, letter salutations, logos, or copyright notices. They can save time, ensure fewer errors, and maintain consistency when creating messages. **Quick Parts** are available to any future message that you create.
Practice Exercise 77 Quick Parts	1. ***Create a new message →Type Mike's Sporting Goods, Corporate Headquarters →Select text.*** 2. ***Insert Ribbon Tab →Click***  ***→ Save Selection to Create New Building Block →*** **Name:** ***Test →*** OK. 3. ***Go back to Quick Parts to use the new text.***
4.29 Dial Contact	If you are connected to a modem or automated dialing system, you can have **Outlook** call the contact.
4.30 Create Letter	This is no longer supported in **Outlook 2007, 2010**, or **2013**. However, it did work in **Outlook 2003.**
4.31 Default Program	When you are on the internet and a web page needs to open the **Default Program** on the computer, this feature will open **Outlook**. ***File Tab →Options →General Tab →*** 

Part

Section 2: Exchange Features

Exchange is an **Email** server used in conjunction with **Outlook**.

Concept	Explanation / *Command string in italic.*
4.32 Recover Deleted Items	**Exchange** servers keep **Deleted Items** for a specified period of time (usually one month). Delete **Email**: ***Right-click on the Deleted folder (located in the left Navigation Pane)→Empty Folder.*** **Recover Deleted Email**: ***Right-click on the Delete Items folder→ Recover deleted items.***
4.33 Web App	**Exchange** provides a **Web-Based** interface to your **Email**. To determine the web link: ***File Tab→Info→Account Settings→The path will be displayed if you have web access.***
4.34 Alerts	This is an **Exchange** feature to set **Alert** conditions**:** ***File Tab→Manage Rules and Alerts→Manage Alert Tab.***

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Chapter 5 - People Pane

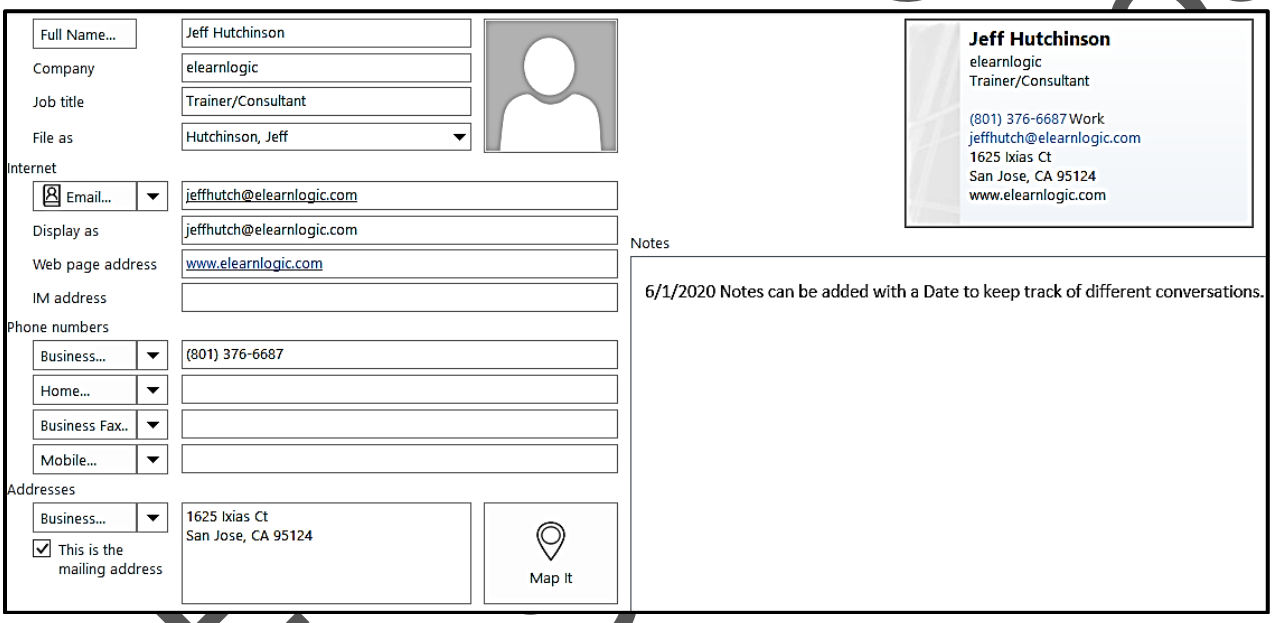
The **People Pane** is used to store the **Contact** information in a folder for future recall. The primary component is the **Email** address, but other personal information can also be saved. The **People Pane** in **Outlook** integrates with other **Outlook** components used to communicate with other **People**. In previous versions of **Outlook,** this feature was called the **Contacts Pane** and is still known by that name today.

Chapter Table Of Contents

[Section 1: Creating Contacts]
[Section 2: Contact Manipulation]

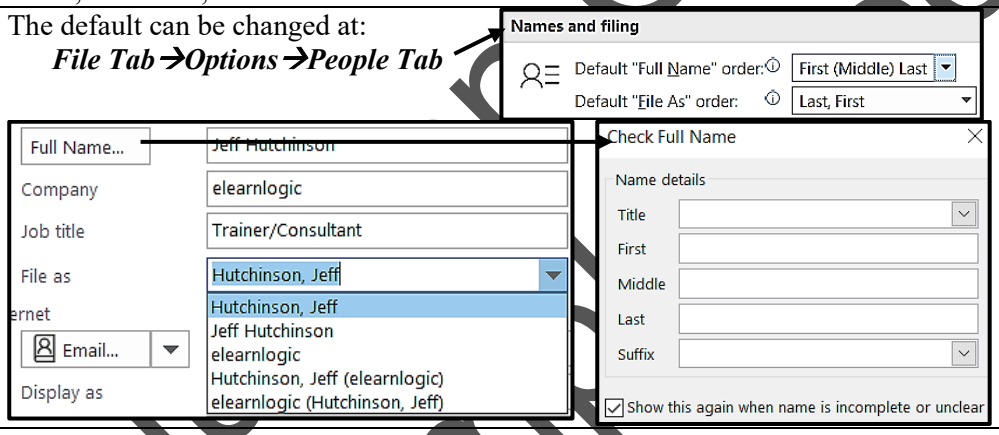
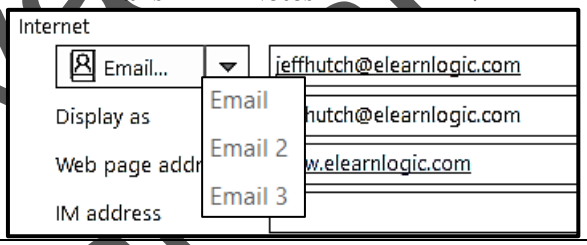
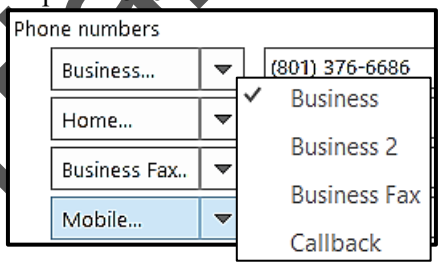
Section 1: Contact Manipulation

You can use the **General** page to enter a contact's name, job title, company, address, phone number, **Email**, and web page. The **Display As** box allows you to enter the contact's name as you want it to appear in the **To** box in any **Email**s you create using the **Contacts**.



Concept	Explanation / *Command string in italic.*
5.1 New Contact	This will **Create** a new **Contact** screen (see above). **Option 1 -** ***People Pane→Double click in the blank contact area→fill out the contact information.*** **Option 2 -** ***Home Ribbon Tab→New Group→***  ***New Contact.*** **Tip**: Keyboard Command **Ctrl** **Shift** **C** keys - **Create a Contact.** Keyboard Command **Ctrl** **N** keys - **Create a New Contact (in the People Pane).**
Practice Exercise 78 New Contact	***Click the***  ***Contacts Button (located in the lower left corner of the interface)→ Home Ribbon Tab→New Group→***  ***New Contact→ Enter the information)→Press***  ***Close & Save when finished***

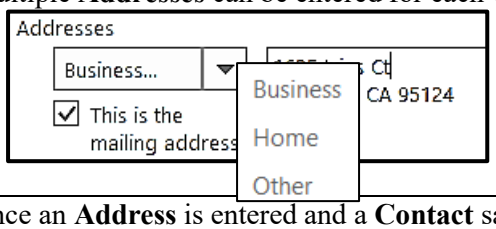
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Practice Exercise 79 *Contacts*	***Click the***  ***People Button (located in the lower left corner of the interface →Home Ribbon Tab→New Group→***  ***New Contact→*** ***Create the following Contacts:*** Ted Johnson — 832-223-3322 — Studentab1@gmail.com Janet Grant — 743-334-5467 — Studentab2@gmail.com
5.2 Full Name	When you enter the **Full Name** of a **Contact**, you need to define how it will be displayed in the **People Pane**. Als, click on the **Full Name** button to verify each word is placed in the proper field. **Full Name** - When you enter the **Full Name**, the system will break the name into different fields. **Display As** - By default, it displays the name in the **People Pane** such as "Last, First", First Last, etc.
Practice Exercise 80 *Full Name*	The default can be changed at: ***File Tab→Options→People Tab*** 
5.3 Internet	Multiple **Emails** can be entered for each **Contact**. Some choose to place the alternate **Emails** in the **Notes** field. 
5.4 Phone Numbers	Multiple **Phone** numbers can be entered for each **Contact**.  Tip: When you place two **Phone Numbers** in one box, such as **Business** and **Business 2**, only one will be visible.

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5.5 Addresses

Multiple **Addresses** can be entered for each **Contact**.



5.6 Generate Map



Once an **Address** is entered and a **Contact** saved, a **Map** can be generated.

Open Contact with an address→Click on the  ***"Map It" icon (button next to the address).***

Tip: In previous versions, it displayed the following icon.



5.7 Adding A Contact's Picture

Insert A Picture of a contact into the **General Page** of the **Contact Window**. **Outlook** accepts a large number of picture formats, including **BMP, JPG, GIF, TIF, WMF,** as well as other formats. ***Click on the Picture to add an image.***
Tip: In **Outlook 2010 Right-click on the Picture**.



Practice Exercise 81 Contact Picture

Insert A Picture of a contact into the **General Page** of the **Contact Window**. **Outlook** accepts a large number of picture formats, including **BMP, JPG, GIF, TIF, WMF,** as well as other formats. ***Click on the Picture to add an image.***

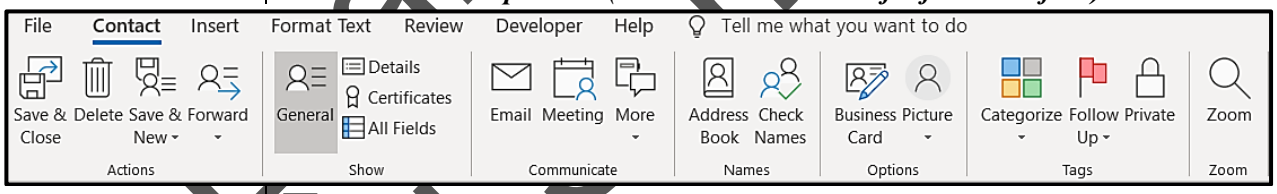
Practice Exercise 82 Contact Picture Outlook 2010

In **Outlook 2010, Right-click on the Picture.** ***Open any Contact→Click on Picture icon→C:\Data\Outlook365-1\ContactPic.png→*** Open.

5.8 Contact Ribbon Tab

This is the main **Ribbon** used to manipulate a **Contact**.

Click the  ***People icon (located in the lower left of the interface).***



Save & Close - This **Saves** the opened **Contact** and **Closes** it.

Delete - You can **Delete A Contact** by using the **Delete Button.**
See Chapter 5 Section 2

Save New - This **Saves** a **Contact** as a new item.

Forward - This **Forwards** a **Contact** to another person via Email.
See Chapter 5 Section 2

General - This pane/layout can be used to **Edit Primary Information**.

Details - This will let you edit **Details** or **Secondary Information**.

Certificates - This Displays the **Certificate** page of contact used to store the **Digital ID** which will send encrypted email to this **Contact**.

All Fields - This Displays **All** available **Fields**.

Email - This will send an **Email** to a **Contact**. See Chapter 5 Section 2.

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Meeting - This will send an **Email** to a **Contact**. See Chapter 5 Section 2.

More - This Provides sending the **Contact** by **Calling**, **Open Web Page**, **Assign a Task**, or **Map it.** See Chapter 5 Section 2.

Address Book - This will provide access to available **Names, Email,** and **Contact** information**.** See Chapter 5 Section 2.

Check Names - This will **Check Email** names to make sure they will send.

Business Card - This will display the **Contact** in a **Business Card** layout. See Chapter 5 Section 2 for layout.

Picture - This will add a **Picture** to a **Contact**.

Categorize - This will **Categorize** and color code a **Contact**. See Chapter 5 Section 2.

Follow Up - This will set a **Flag** to remind you of an event. See Chapter 5 Section 2.

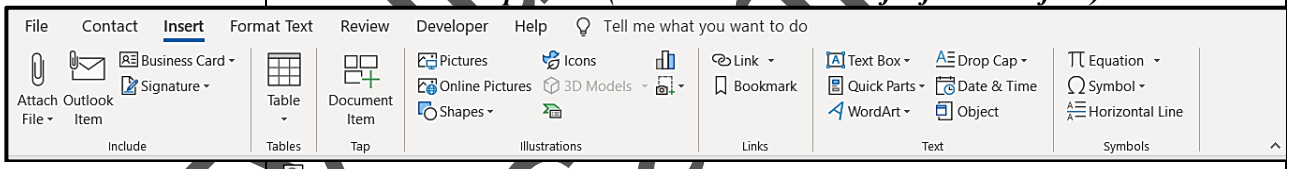
Private - On the **Exchange Server**, this will mark the item as **Private** so no one will see the **Contact** listed. See Chapter 5 Section 2.

Zoom - This will **Zoom** in or out of the **Contact**.

5.9 Insert Ribbon Tab

This **Ribbon** will insert objects into the contact.

Click the People icon (located in the lower left of the interface).



Attach File - This **Attaches** a **File** to a **Contact**.

Outlook Item - This **Attaches** an **Outlook Item** to a **Contact**.

Business Card - This will display a **Contact** in a **Business Card** layout. See Chapter 5 Section 2 for layout.

Signature - This lists the previously defined **Signatures**.

Table - This creates a **Table**.

Document Item - This will insert a **Document** from a file location.

Pictures - This inserts locally stored **Pictures**.

Online Pictures - This gets **Pictures** off the **Internet**.

Shapes - This inserts **Shape** objects.

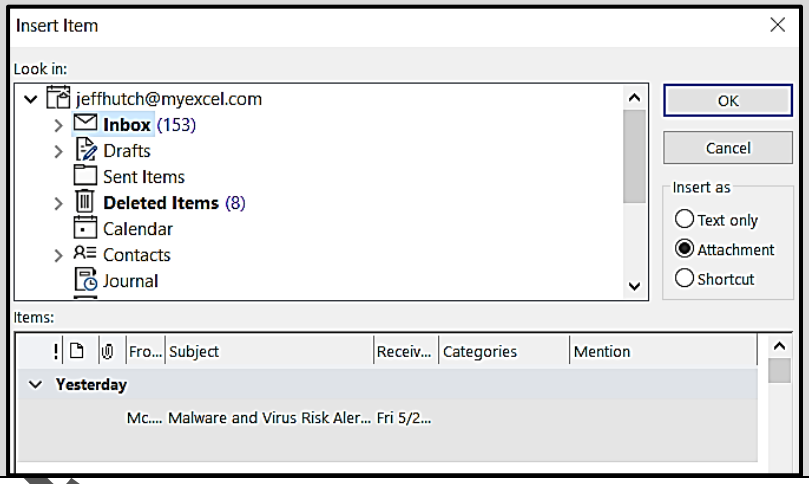
Icons - This inserts **Icons**.

3D Models - This inserts a **3D Model**.

SmartArt- This inserts **SmartArt**.

Charts - This inserts a **Chart.**

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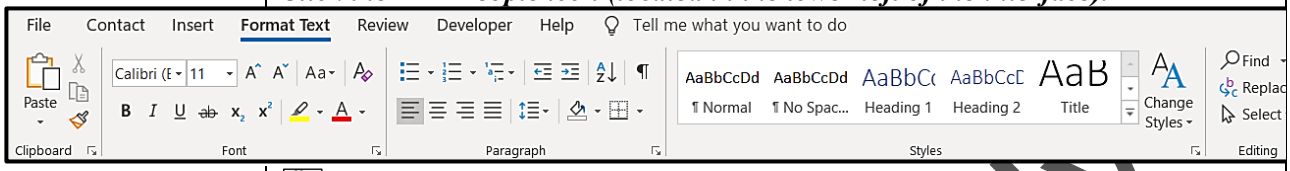
	Screenshot - This will take a **Screenshot** of the opened window. **Link -** This will insert a **Hyperlink** to a Web Site, Document, or place in Outlook. **Bookmark -** This will insert a **Bookmark** in the opened **Contact Notes** field. You can then create a **Link** to the **Bookmark** within the **Contact Notes**. **Text Box -** This will insert a **Text Box** used to highlight Notes, Quotes, etc. **QuickParts -** This will open the **QuickParts** library used to store **Quotes** and text. **WordArt -** This will add **WordArt** that provides the animated text**.** **DropCap -** This will add large capital letters to a paragraph. **Date & Time -** This will insert the **Date** and **Time**. **Object -** This will insert an **Embedded Object** from another **Office Application.** **Equation -** This will insert an **Equation** which is a quadratic formula**.** **Symbol - This will insert a Symbol** that is not on the keyboard. **Horizontal Line -** This will add a **Horizontal Line** across the entire page.
Practice Exercise 83 *Link To Item*	The **Actions Group** allows you to link other **Outlook** resources to a specific contact such as **Email**, **Notes**, or **Calendars**. ***Open a Contact →Insert Ribbon Tab →Include Group →*** **Outlook** ***Item →Choose Email or Contact Folder →*** OK **.** 

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5.10 Format Text Ribbon Tab

This **Ribbon** provides **Format** capabilities.

Click the** **People icon (located in the lower left of the interface).



Paste - This will **Paste** a **Copied** item**.**

Cut - This will **Cut** an item.

Copy - This will **Copy** an item.

Format Painter - This will **Copy Format** from another piece of text.

Font Group - This is used to **Format Characters.**

Paragraph Group - This is used to **Format Paragraphs.**

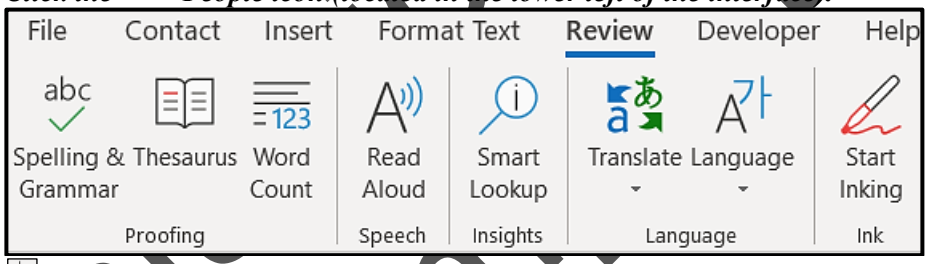
Styles - This will **Format** text as a **Style.**

Editing Group - This will include **Find, Replace,** and **Selections** tools.

5.11 Review Ribbon Tab

This **Ribbon** provides text checking and verifying.

Click the** **People icon (located in the lower left of the interface).



Spelling & Grammar -This will perform a **Spell** and **Grammar** check.
Tip: Keyboard Command F7 key.

Thesaurus -This will find alternate words to use.
Tip: Keyboard Command **Shift** F7 keys.

Word Count - This will **Count** the number of words, characters, and lines.

Read Aloud - This will **Read** the text using a text interrupter program.

Smart Lookup - This will **Lookup** a selected work on the **Internet.**

Translate - This will **Translate** text to a different language.

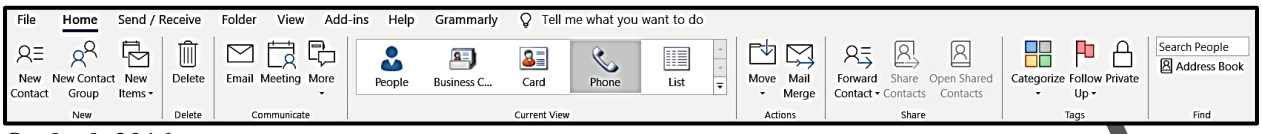
Language - This will change the **Language** for proofing tools.

Start Inking - This will draw using a freehand **Ink** pen**.**

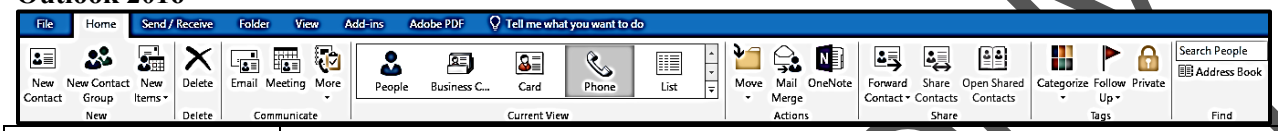
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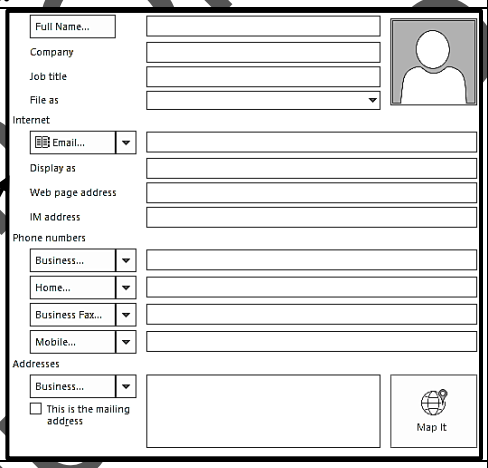
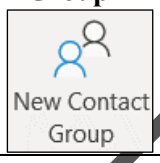
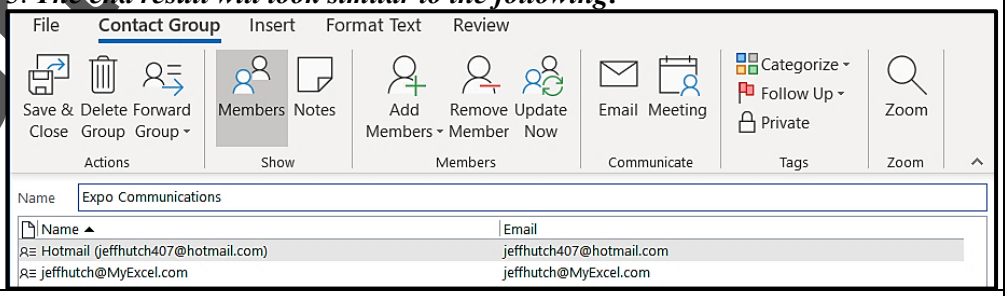
Section 2: Home Ribbon Tab

Outlook 365



Outlook 2016



Concept	Explanation / *Command string in italic.*
5.12 New Contact 	You can use the **General** page to enter a contact's name, job title, company, address, phone numbers, **Email**, and web page.
Practice Exercise 84 New Contact	***Click the***  ***Contacts Button (located in the lower left corner of the interface)→ Home Ribbon Tab→New Group→***  ***New Contact→ Enter the information).*** ***Press***  ***Close & Save when finished*** 
5.13 New Contact Group 	A **Group** is a collection of names and addresses that are usually related in some way. You can then send an **Email** using the **Group** and expand it to see all individual **Email**s. Then, remove one if necessary. **Tip: Groups** in **Outlook 2010/2013** used to be called **Distribution Lists** in previous versions of **Outlook**.
Practice Exercise 85 Contact Group	1. ***People Pane→Home Ribbon Tab→New Group→***  ***New Contact Group→*****Name:** ***(Group name).*** 2. **In the New Contact Group Dialog:** ***Contact Group Ribbon Tab→***  ***Show Group→***  ***Add Members dropdown arrow→ Add Email from one of the following:*** 3. ***The end result will look similar to the following:*** 
5.14 Expand Groups	This will allow you to **Expand** the list to remove a specific **Email**.

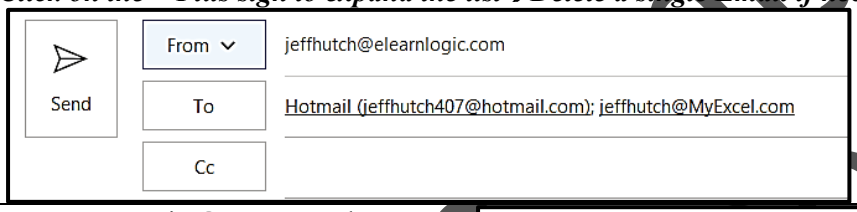
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Practice Exercise 86 Group

1. ***Open the Contacts folder→Select the Expo Communications Contact from the previous practice exercises.***
2. ***Home Ribbon Tab→Communicate Group→***  ***Email→***



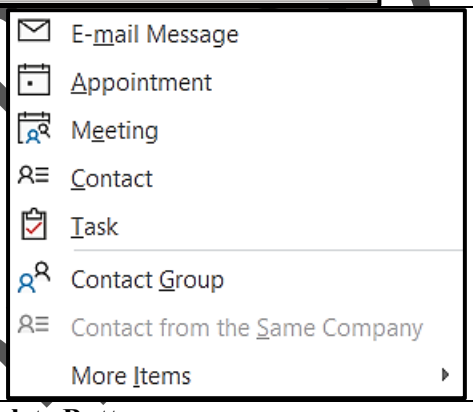
3. ***Click on the + Plus sign to expand the list→Delete a single Email if necessary.***



5.15 New Items



These are **Items** in **Outlook** such as **Email Messages, Appointments, Meetings, Contacts, Tasks, Contact Groups,** etc.



5.16 Delete



You can **Delete A Contact** by using the **Delete Button.**

Practice Exercise 87 Delete

In the People Pane→ Right-click on a Contact→  ***Delete.***
or *Select a Contact→Press the* **Delete** ***key.***

5.17 Email

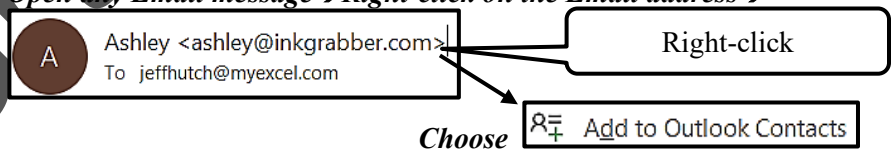


Sometimes, it's easier to find a **Contact** first, then set up the meeting.

Practice Exercise 88 Email

People Pane→ Contact Ribbon Tab→ Communicate Group→  ***Email.***

Click the  ***Email Button (located in the lower-left corner of the interface)→ Open any Email message→Right-click on the Email address→***

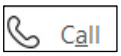
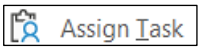
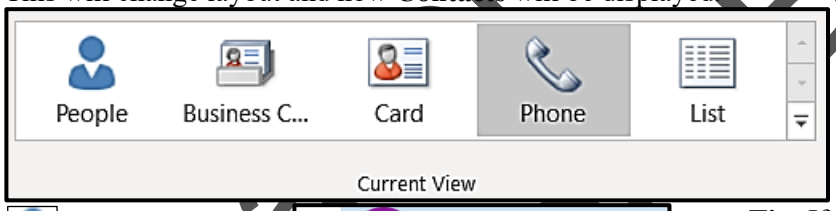
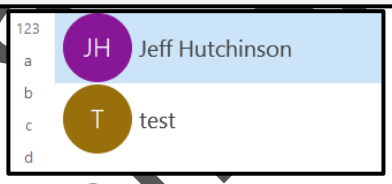
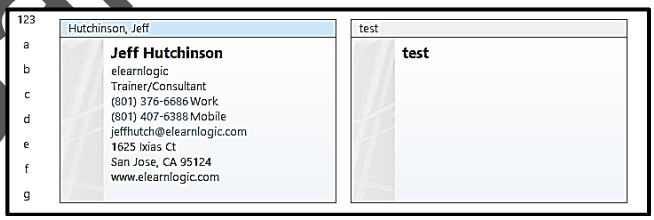


Choose

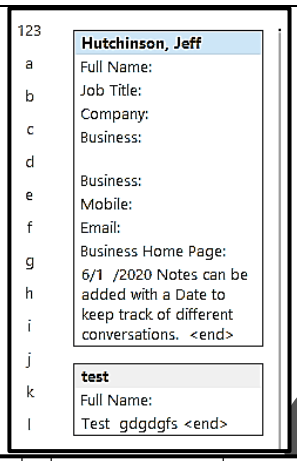
Create A Contact Drag & Drop - ***Select Email (don't open it)→Drag n drop Email to the***  ***People folder.***

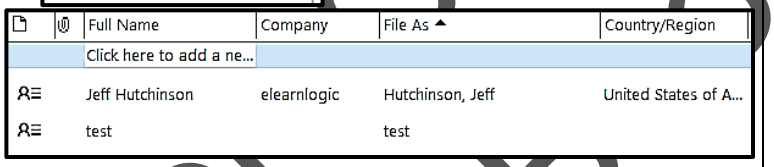
Tip: Once created, you may need to minimize the main **Email** screen to see a new contact in the background. Another advantage of this feature is that it inserts an **Email** in the notes field.

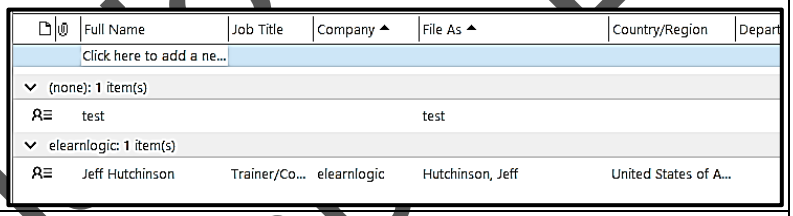
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5.18 Meeting 	Sometimes it is easier to find the **Contact** first then set up a **Meeting**.
Practice Exercise 89 Meeting	***People Pane →Contact Ribbon Tab → Communicate Group →***  ***Meeting.***
5.19 More 	This will send information in the Contact by:  - This will make a call if you have a **Phone** connected to the system or mobile device.  - This will **Open** a **Web Page** defined in the **Contact**.  - This will **Assign** a **Task**.  - This will **Map** the **Contact** address.
5.20 Current View	This will change layout and how **Contacts** will be displayed.   **People View** This will display pictures in **Contact**.  **Tip**: If pictures are available, they would be displayed to the left.  **Business Card View** The display will show information in a **Business Card layout.**  **Tip**: Notice the **ABC Letters** listed on the right side. Click on a letter to navigate to those **Business Cards**.

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<table>
<tr>
<td></td>
<td>
Card View
This will stack Cards on top of each other.


Phone View
This will display like a database report.


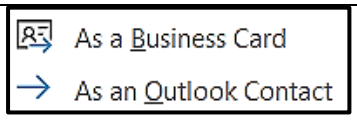
List View
This will display a Contacts in a List layout.


</td>
</tr>
<tr>
<td>5.21 Move

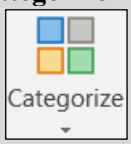
</td>
<td>This will Move a selected Contact to a specific folder in the Navigation Pane. Use the Shift and the Ctrl keys to select multiple Emails and drag n drop them to the appropriate Folder.</td>
</tr>
<tr>
<td>5.22 Mail Merge

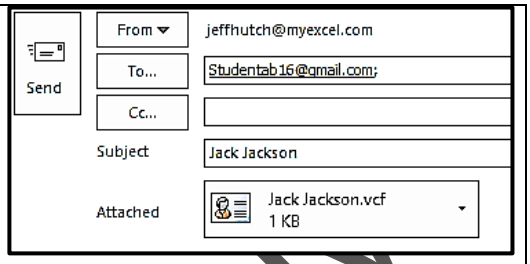
</td>
<td>This will merge Contacts with a form letter to email multiple people. The advantage is each Email sent, using Mail Merge, will send the message from you directly to a single Email.

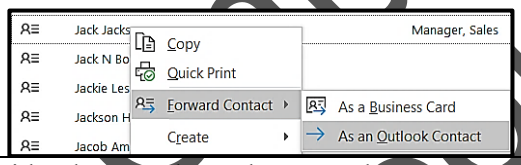
Refer to Appendix D - Mail Merge for more details.</td>
</tr>
<tr>
<td>5.23 Forward Contact

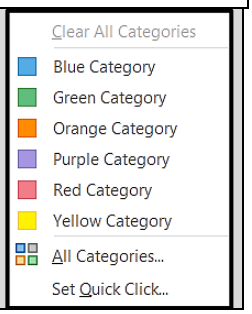
</td>
<td>This allows you to Email Contact to a co-worker or other recipient.

</td>
</tr>
</table>

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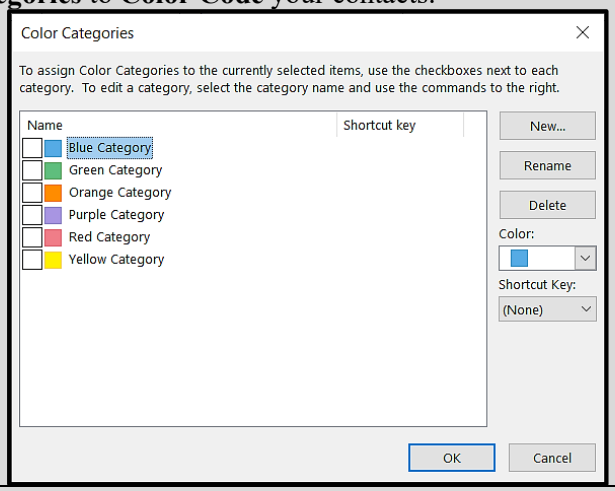
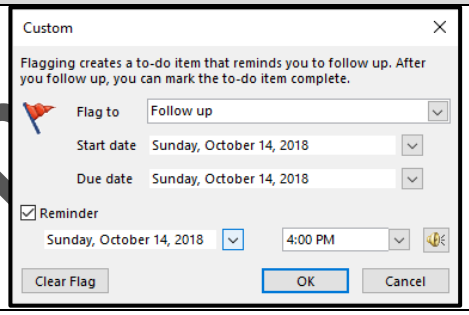
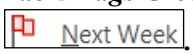
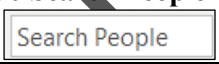
Practice Exercise 90 Forward Contact	***Home Ribbon Tab→Share Group→Forward Contact→*** ***Tip: Right-click on the Contact→*** ***Forward Contact→*** ***As a Business Card.*** ***Or*** ***As an Outlook Contact.*** **Tip**: Also available in: ***People Pane →Actions Group→Forward Contact.***
5.24 Share Contact 	This will allow you to **Share Contacts** with other people on the network. **Tip:** You must be connected to an **Exchange Server**.
5.25 Open Shared Contacts 	This will allow you to **Open** another person's **Shared Contact**. **Tip:** You must be connected to an **Exchange Server**.
5.26 Categorize 	The new **Color Category** feature provides a quick and visual way to identify and locate information. Create **Color**





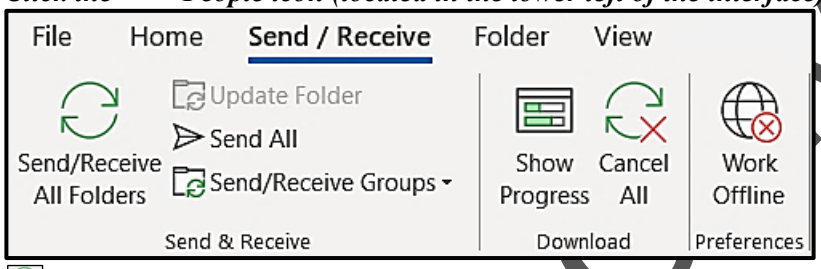


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Practice Exercise 91 *Categorize Contact*	***Click on a contact →Home Ribbon Tab →Tabs Group →***  ***Categorize dropdown arrow:*** **Tip**: **Outlook 2010** it is called **Color Categories: Categories** to **Color Code** your contacts. 
Practice Exercise 92 *Categorize Blue*	***Click on a contact →Home Ribbon Tab →Tags Group →→***  ***Categorize dropdown arrow →Click***  ***All Categories Button →***  ***Blue Category.***
5.27 Follow Up 	When you flag a contact, you can also select from **Today, Tomorrow, This Week, Next Week, No Date,** and **Custom** to establish a due date. 
Practice Exercise 93 *Flag For Follow-up*	1. ***Open a contact →Contact Ribbon Tab →Tags Group →***  ***Follow-up dropdown arrow →*** . 2.  ***Follow-up dropdown arrow →***  ***Add Reminder →*** ***(choose defaults displayed).***
5.28 Flagging A Contact For Follow-Up	You can add a **Flag** to a **Contact** as a reminder or call for **Follow-up.** This feature is helpful when you need to follow-up on conversations or requests from your contacts. When you set a **Follow-up Flag,** it creates a **Task**. ***Home Ribbon Tab →Tags Group →***  ***Flag For Follow-Up →***  ***Today.***
5.29 Private 	On the **Exchange Server**, this will mark an item as **Private** so no one will see the **Contact** listed.
5.30 Search People 	This will **Search** your **Address Book** for existing **Email** based on a **Keyword Search**.
5.31 Address Book 	This will provide access to available **Names, Email,** and **Contact** information**.**

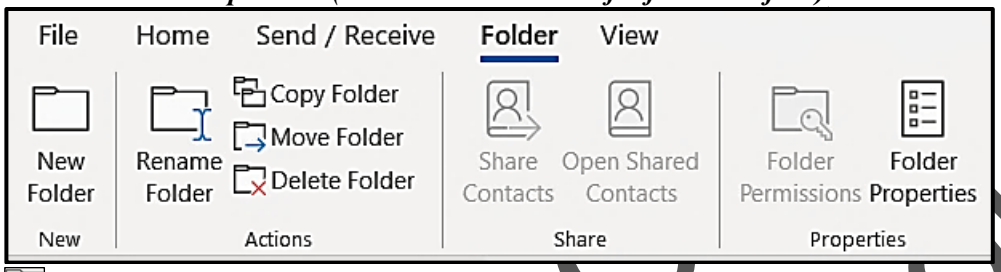
For Evaluation Partial Sample

Section 3: Send/Receive Ribbon Tab

Concept	Explanation / *Command string in italic.*
5.32 Send/Receive Ribbon Tab	These are **Send / Receive** options. The following is the ***Send / Receive Ribbon Tab.*** ***Click the***  ***People icon (located in the lower left of the interface).***   **Send/Receive All Folders** - This will **Send/Receive Email** from all accounts. **Tip**: Keyboard Command **F9** key.  **Update Folder** - This will **Send/Receive Email** or items in the selected **Folder**. **Tip**: Keyboard Command **Shift**, **F9** keys.  **Send All** - This will **Send** a message only and will not receive anything. It can be used if a large **Email** is being received or processing and you only want to send new **Email** out.  **Send/Receive Groups** - Different mailboxes are organized by **Groups** and each **Group** can be processed independently. Click on the dropdown arrow and choose **Define Send/Receive Groups** to specify the **Automatic Send/Receive** options.  **Show Progress** - This will open the dialog box to show **Send/Receive Progress**.  **Cancel All** - If the **Send/Receive** is taking too long, it can be **Cancelled**.  **Work Offline** - This will prevent new **Emails** from being downloaded.

For Evaluation Copy Partial Sample Book

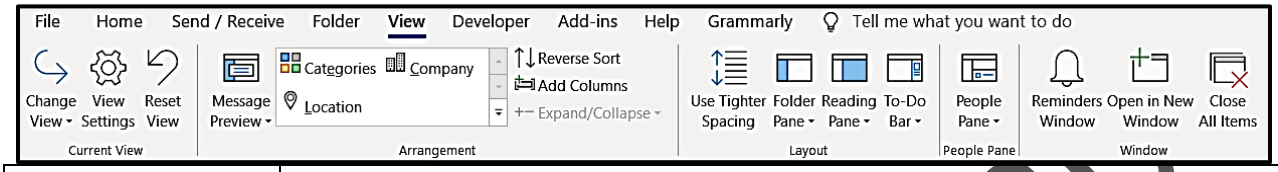
Section 4: Folder Ribbon Tab

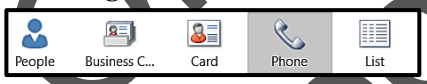
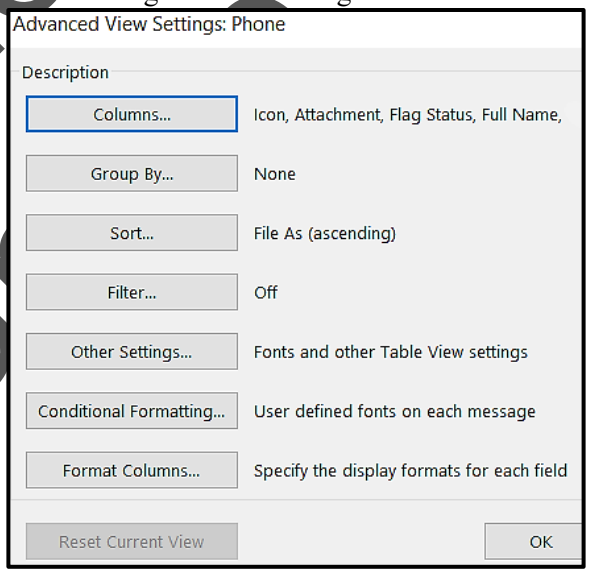
Concept	Explanation / *Command string in italic.*
5.33 Folder Ribbon Tab	These are **Folder** related options. ***Folder Ribbon Tab.*** ***Click the***  ***People icon (located in the lower left of the interface).***  **New Folder** - This will create a **New Contact Folder** from a selected **Folder** in the **Navigation Pane**. **Tip**: You can also **Right-click** on any folder in the **Navigation Pane** and choose **New Folder**. **Tip**: Keyboard Command **Ctrl** **Shift** **E** keys. **Rename Folder** - This will change the name of a selected **Folder**. Also, you can **Right-click** on any **Folder** to **Rename** it. **Copy Folder** - This will **Copy** a selected **Folder** to a different location in the Navigation Pane. **Move Folder** - This will **Move** a selected **Folder** to a different location in the **Navigation Pane**. **Delete Folder** - This will **Delete** a selected **Folder**. **Share Contacts** - This will allow you to **Share Contacts** with other people on the network. **Tip:** You must be connected to an **Exchange Server**. **Open Shared Contacts** - This will allow you to **Open** another person's **Shared Contact**. **Tip:** You must be connected to an **Exchange Server**. **Folder Permissions** - This will allow you to view and edit the sharing **Permissions** for a selected **Folder**. **Tip:** You must be connected to an **Exchange Server**. **Folder Properties** - This will open a **Properties** for a selected **Folder**. **Tip**: You can also **Right-click** on any **Folder**.
Practice Exercise 94 New Contact Folder	You can also create additional **Contact Folders** to organize your **Email** contacts: ***Right-click on contacts folder*** → ***New Folder*** → **Name:** ***MyContacts***.

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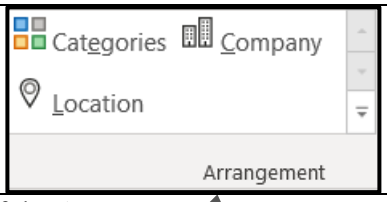
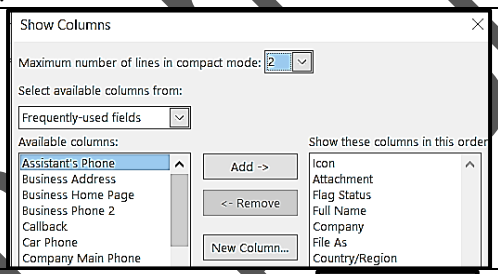
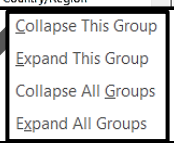
Section 5: View Ribbon Tab

Click the**  **People icon (located in the lower left of the interface).



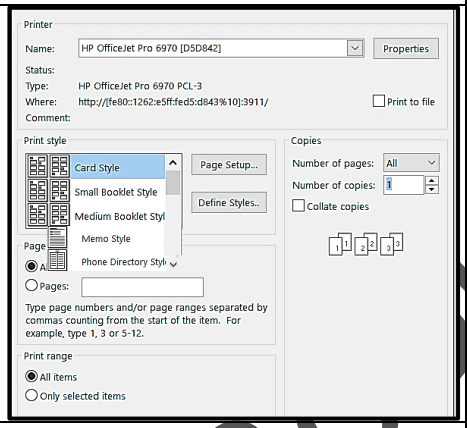
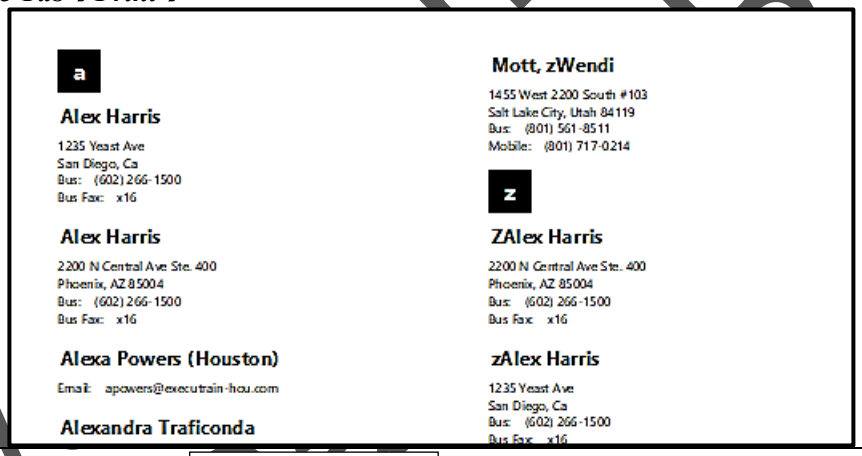
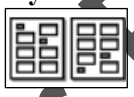
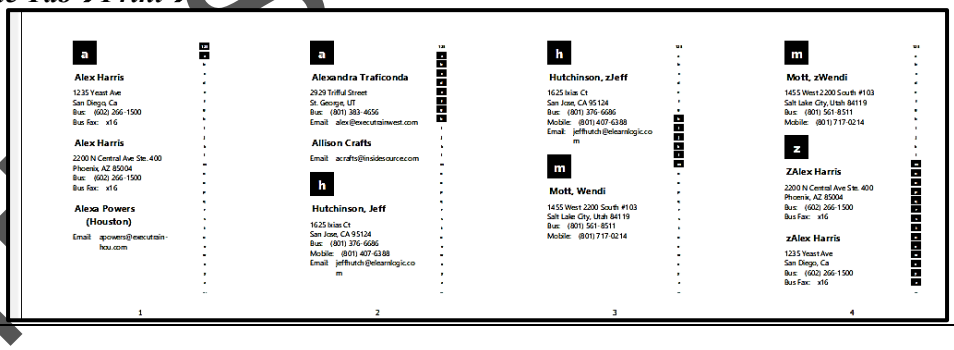
Concept	Explanation / *Command string in italic.*
5.34 Change Views	***View Ribbon Tab →Current View Group →***  ***Change View.***  **People -** This will display pictures in **Contact**. **Business Cards -** This is the display information in a **Business Card** layout. **Card -** This will stack **Cards** on top of each other. **Phone -** This will display like a database report. **List -** This will display **Contacts** in a **List** layout. [See Chapter 5 Section 2 for layout.]
5.35 View Settings 	Each View (above) will activate different settings. The following is an overview: **Columns** - This will add or remove **Column Labels**. **Group By** - This will set the default display **Grouping** of **Email**. **Sort** - This will set the default **Sorting** when **Outlook** is opened. **Filter** - This will eliminate specific **Emails** by **Filtering**. **Other Settings** - This will format the look, layout, and font size displayed in the **Email** window. **Conditional Formatting** - This will format **Email** under specific **Conditions**.  **Format Columns** - This will format your **Columns**. **Reset Current View** - This will **Reset** all changes made in **View Settings** to the original default state. This is the same as ***View Ribbon Tab →Current View Group →***  ***Reset View***
5.36 Reset View 	This will **Reset** all changes made in **View Settings** to the original default state.
5.37 Message Preview 	This will display 1, 2, 3 lines of information within the incoming email under the title. [See Chapter 1 Section 2 for more details.] **Tip:** This feature is available in the **Phone** and **List** views.

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5.38 Arrangement	This is a quick way to layout or **Group Contacts** to view by specific **Arrangements**. ***View Ribbon Tab→Arrangement Group:*** 
5.39 Reverse Sort	This will **Reverse** the **Sort** ascending/descending of the **Arrangement**. **Tip:** You can also **Sort** contacts by a specific field when you open **Outlook:** ***View Ribbon Tab→Current View Group→*** ***View Settings→*** Sort... ***Sort→Sort items by: (Enter the sort field).***
5.40 Add Columns	This opens the **Show Columns** interface to add additional **Columns**. **Tip**: You can also: ***Right-click on any Label/Field Name→ Field Chooser.*** **Tip:** This feature is available in the **Phone** and **List** views. 
5.41 Expand/Collapse	This will **Expand/Collapse** the **Arrangement** based on the following options. **Tip:** This feature is available in the **List** view. 
5.42 Use Tighter Spacing	This will **Tighten** the distance between **Email** messages. **Not Highlighted/Not Selected** **Highlighted or Selected**
5.43 Folder Pane	This is the **Navigation Pane** located on the left of the **Tri-Pane** layout. **Refer to Chapter 1 Section 1 for more details.**
5.44 Reading Pane	This is located to the right or bottom of the selected **Contact** in the **People Pane**. **Refer to Chapter 1 Section 1 for more details.**
5.45 To-Do Pane	This is located on the right side of the **Tri-Pane** layout and opens a **Mini-Calendar**, **Contacts**, and **Task Pane**. **Refer to Chapter 1 Section 1 for more details.**
5.46 People Pane	This will display the **People Pane** in the **Reading Window View**. You must have the **Reading Pane** window active in either the right or bottom position for it to be active.
5.47 Reminders Window	If there are active **Reminders** defined, then the **Reminders** pop-up windows will appear when the **Reminder** is due.
5.48 Open in New Window	This will **Open** any **Selected Folder** in a **New Window** so you can display them side-by-side. ***Select a Contact folder→View Ribbon Tab→ Windows Group→ Open In New Window.***
5.49 Close All Items	This will **Close** any **Opened Contact** or any **Item Opened** in **Outlook**. ***Double-click on a Contact to Open it→View Ribbon Tab→ Windows Group→ Close All Items.***

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Section 6: Print Contacts

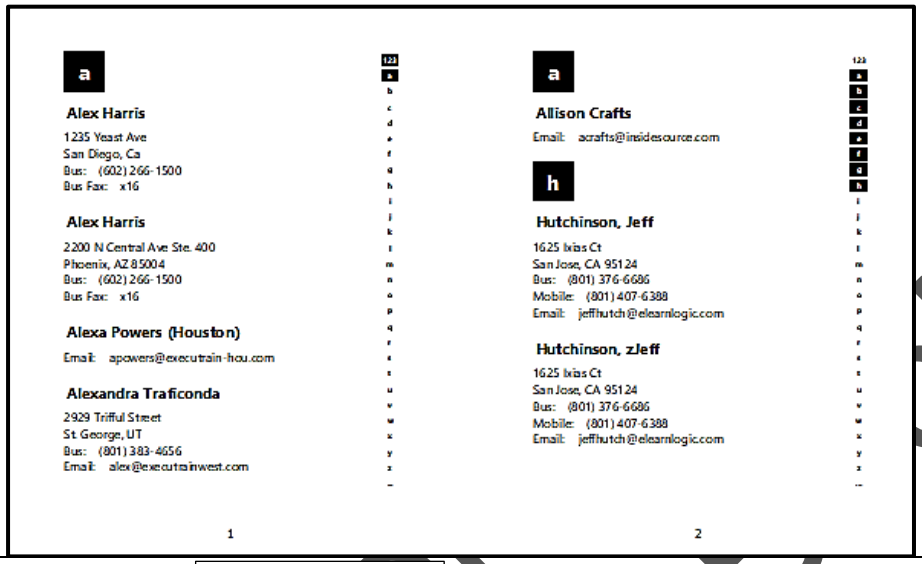
Concept	Explanation / *Command string in italic.*
5.50 Printing Contacts Information	You can **Print** a contact list and individual contact information in a number of different ways. ***File Tab →Print →*** Print Options. 
5.51 Card Style 	***File Tab →Print →*** Card Style 
5.52 Small Booklet Style 	***File Tab →Print →*** Small Booklet Style 

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5.53 Medium Booklet Style



File Tab → Print → Medium Booklet Style



a

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Bus Fax: x16

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Phoenix, AZ 85004
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Alexa Powers (Houston)
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Alexandra Traficonda
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Email: alex@executrainwest.com

1

a

Allison Crafts
Email: acrafts@insidesource.com

h

Hutchinson, Jeff
1625 Ixias Ct
San Jose, CA 95124
Bus: (801) 376-6686
Mobile: (801) 407-6388
Email: jeffhutch@elearnlogic.com

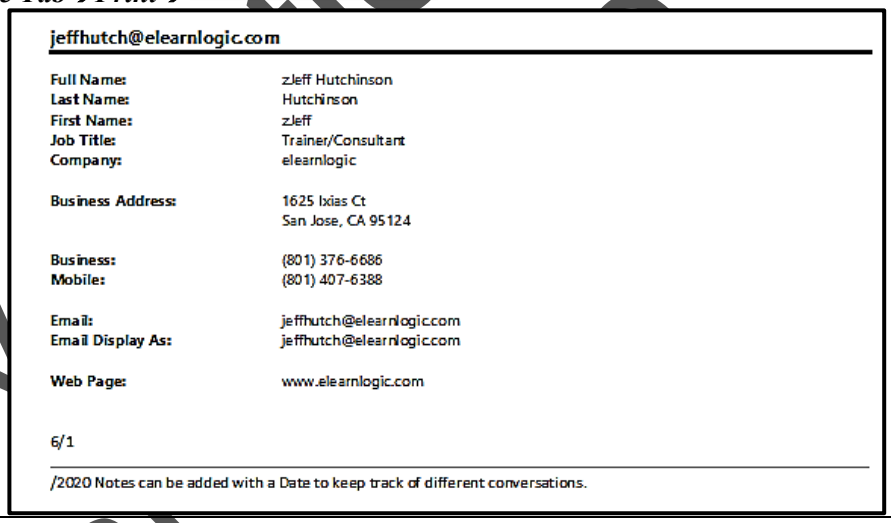
Hutchinson, zJeff
1625 Ixias Ct
San Jose, CA 95124
Bus: (801) 376-6686
Mobile: (801) 407-6388
Email: jeffhutch@elearnlogic.com

2

5.54 Memo Style



File Tab → Print → Memo Style



jeffhutch@elearnlogic.com

Full Name:	zJeff Hutchinson
Last Name:	Hutchinson
First Name:	zJeff
Job Title:	Trainer/Consultant
Company:	elearnlogic
Business Address:	1625 Ixias Ct San Jose, CA 95124
Business:	(801) 376-6686
Mobile:	(801) 407-6388
Email:	jeffhutch@elearnlogic.com
Email Display As:	jeffhutch@elearnlogic.com
Web Page:	www.elearnlogic.com

6/1

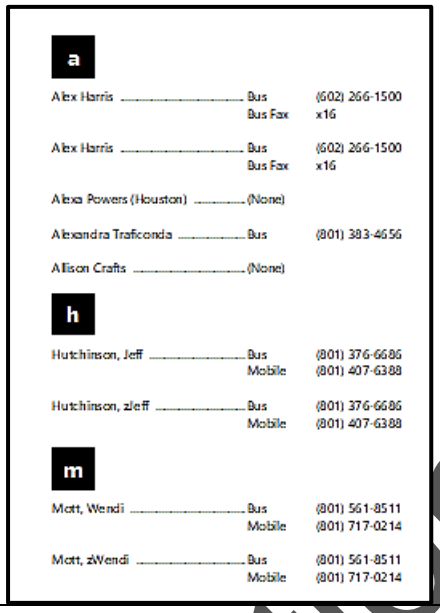
/2020 Notes can be added with a Date to keep track of different conversations.

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5.55 Phone Directory Style



File Tab → Print → Phone Directory Style



a

Alex Harris	Bus	(602) 266-1500
	Bus Fax	x16
Alex Harris	Bus	(602) 266-1500
	Bus Fax	x16
Alexa Powers (Houston)	(None)	
Alexandra Traficonda	Bus	(801) 383-4656
Allison Crafts	(None)	

h

Hutchinson, Jeff	Bus	(801) 376-6686
	Mobile	(801) 407-6388
Hutchinson, zJeff	Bus	(801) 376-6686
	Mobile	(801) 407-6388

m

Matt, Wendi	Bus	(801) 561-8511
	Mobile	(801) 717-0214
Matt, zWendi	Bus	(801) 561-8511
	Mobile	(801) 717-0214

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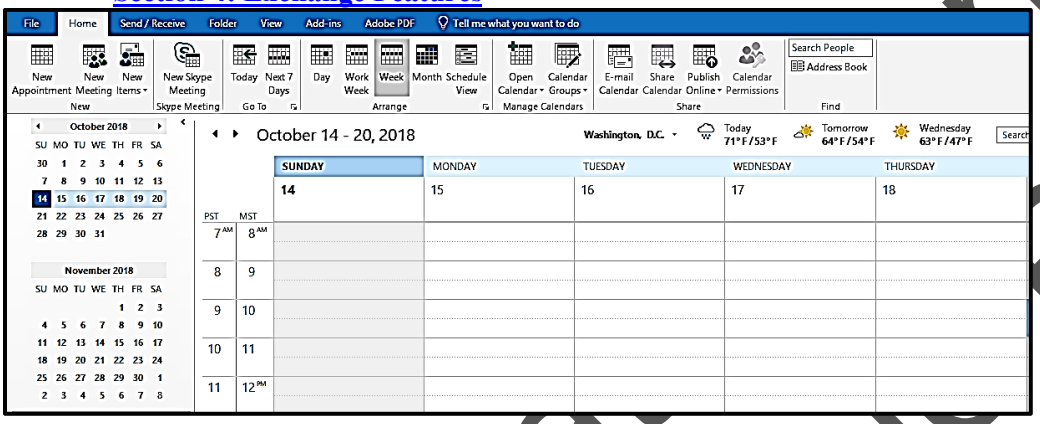
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Partial Sample Book

Chapter 6 - Calendar Pane

Calendars are used for organizational purposes to remember **Appointments** and events. We will cover how to integrate **Calendars** with **Email**, **Tasks,** and **Contacts**. This chapter will cover creating how to create **Appointments**, **Meetings,** and multiple **Calendars**.

Chapter Table Of Contents

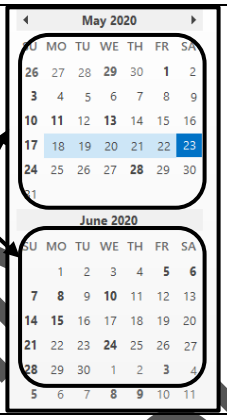
[Section 1: Navigation / Interface]
[Section 2: New Appointment / Meeting]
[Section 3: Multiple Calendars]
[Section 4: Exchange Features]



Section 1: Navigation / Interface

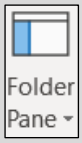
Concept	Explanation / *Command string in italic.*
Practice Exercise 95 *New Calendar*	Before starting, create a new empty **Calendar** to add class events. This will prevent cluttering up your main **Calendar**. *Calendar Pane →Right-click on the Calendar (located under the mini-calendars) →New Calendar →***Name:** *Class.*
6.1 Calendar Pane	Click on the **Calendar icon** (located on the lower-left corner of the interface). The **Calendar** can be displayed in **Days**, **Weeks**, **Months**, or **Schedule View** by clicking buttons on the **Home Ribbon Tab**.
6.2 Date Navigator	This is a **Small Monthly Calendar** in the left top portion of the **Calendar Pane** and displays **Calendar** months in traditional **Calendar** format. It may display one, two, or more small **Calendar** months by dragging the bar below the **Calendar** down. When you click on a specific Date, it will open the events on that Date. A blue highlight will show the Current Date. When you drag to highlight multiple dates, the highlighted dates will be displayed. Drag bar up or down.
Practice Exercise 96 *Navigation*	1. *Calendar icon →Click tomorrow's date in the Date Navigator.* 2. *Select/Drag from Monday to Friday of this week.* Drag to select multiple dates. 3. *Click the first Wednesday of the current month →Hold the* Ctrl *key and click The second Wednesday of the current month.*

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	4. ***Click today's date→Click** next to the month name→ **Click and hold the name of a month in the Date Navigator and drag to select the previous month.*** 5. ***Click** Month in the Home Ribbon Tab→ **Drag the vertical border between the Navigation Pane and the scheduling area to display several columns of months in the Date Navigator.*** 6. ***Return the width of the Navigation to display only one column of months in the Date Navigator→ Click the Day Button to return the Calendar to the day format.*** 
6.3 Today Button 	This takes you to the **Current Date**. ***Home Ribbon Tab→Go To Group→** Today.*
6.4 Calendar Views	The **Day/Week/Month View** is the default view for a **Calendar,** but you can display **Calendar** items in several views. Additional **Calendar** views are available on the **Change View** submenu. Most **Calendar** views apply a filter and display only the **Calendar** items that meet the view criteria, such as active or **Recurring Appointments** only. **Tip**: Useful Keyboard Commands **Alt 1** keys - **Show one day in the Calendar.** **Alt 2** keys - **Show two days in the Calendar.** **Alt 3** keys - **Show three days in the Calendar.** **Alt 4** keys - **Show four days in the Calendar.** **Alt 5** keys - **Show five days in the Calendar.** **Alt 6** keys - **Show six days in the Calendar.** **Alt 7** keys - **Show seven days in the Calendar.** **Alt 8** keys - **Show eight days in the Calendar.** **Alt 9** keys - **Show nine days in the Calendar.** **Alt 0** keys - **Show ten day in the Calendar.** **Alt 0** keys - **Show ten day in the Calendar.** **Alt -** *(minus)* keys - **Show week view.** **Alt =** *(equal)* keys - **Show month view.**
Practice Exercise 97 Filter	**To set a filter:** 1. ***View Ribbon Tab→Current View Group→** View Settings →Filter.* 2. **You can also sort the items:** ***View Ribbon Tab→Current View Group→** Change View drop-down arrow→ List→Click on any Label/Field Name to Sort.*
6.5 Zoom Slider	The **Zoom Slider** is located in the lower right corner and changes the layout from **Normal** to other **Zoom** layouts. This works with **Day**, **Work Week**, and **Week Arrangements**. 

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6.6 Folder Pane

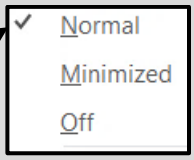


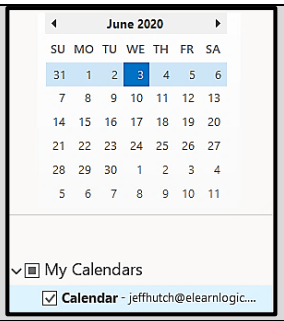
This is located on the left side of the interface and contains **Mini-Calendar**, **Calendar** ☑ check boxes, and **Calendar Groups**.

View Ribbon Tab →Layout Group →

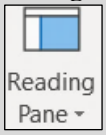


Folder Pane dropdown arrow





6.7 Reading Pane



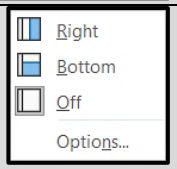
This will open a view that is tied to the selected event (located to the right or bottom of the selected **Calendar Event)**.

To add or remove it:

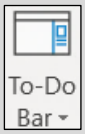
View Ribbon Tab →Layout Group →



Reading Pane dropdown arrow.



6.8 To-Do Bar

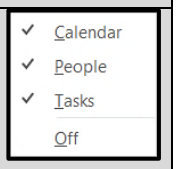


This is located on the right side of the **Tri-Pane** layout and opens a **Mini-Calendar**, **Contacts,** and **Task Pane**.

View Ribbon Tab →Layout Group →



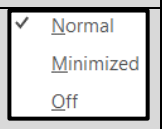
To-Do Bar dropdown arrow.

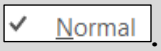


6.9 People Pane



This will display the **People Pane** in the **Reading** window view. You must have the **Reading Pane** window active (either the right or bottom position) in order for it to be active.

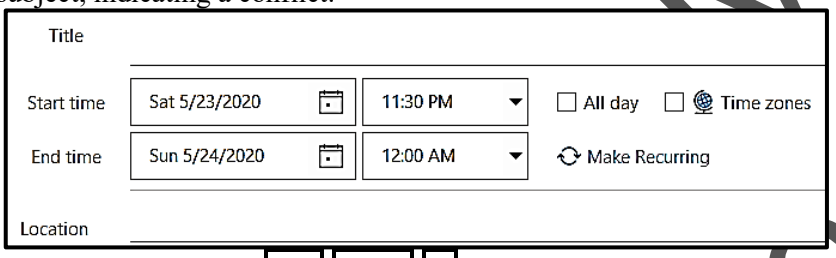
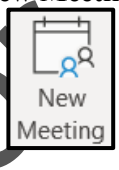
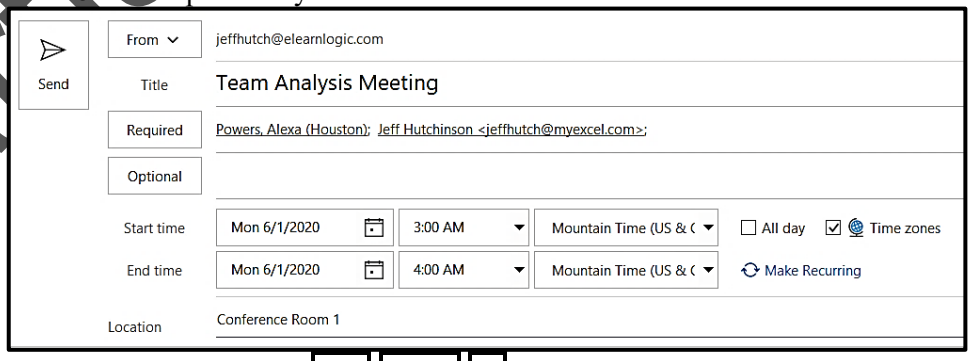


1. ***View Ribbon Tab →Layout Group →Reading Pane drop-down → Choose Bottom or Right.***
2. ***View Ribbon Tab →People Pane Group →***  ***People Pane dropdown arrow →*** 

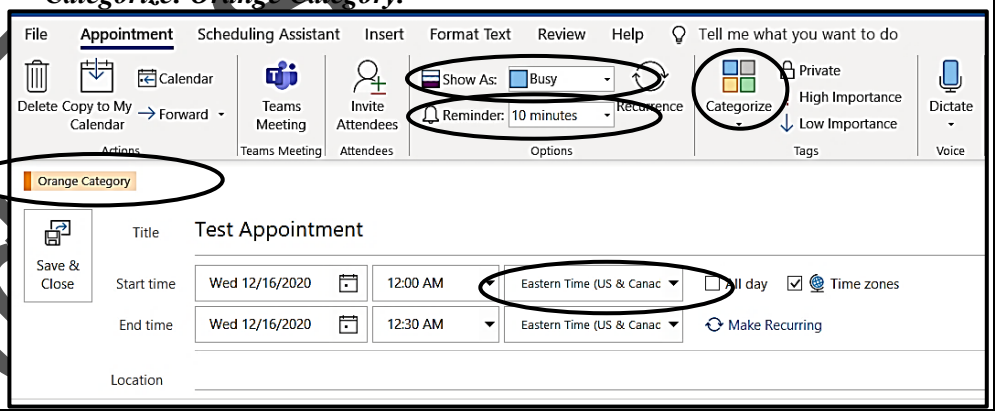
3. ***The Calendar details will be displayed.***

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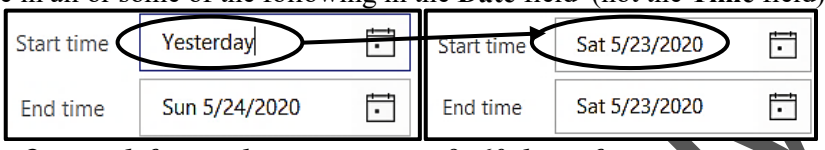
Section 2: New Appointment/Meeting

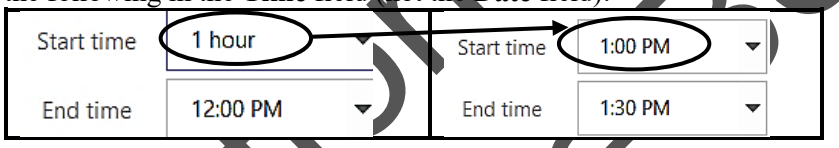
Concept	Explanation / *Command string in italic.*
6.10 New Appointment 	Click on the **New Appointment Button** for activities that do not involve notifying other people or scheduling resources. This **Window** allows you to enter a subject, location, and start and end times for an **Appointment**. If the **New Appointment** conflicts with another **Appointment**, a message will appear above the subject, indicating a conflict.  **Tip**: Keyboard Command **Ctrl** **Shift** **A** keys - **Create an Appointment.** Keyboard Command **Ctrl** **N** keys - **Create a New Appointment (in the Calendar Pane).**
6.11 New Appointment From Email	If you receive an important **Email** but you don't have time to read it and respond, you can schedule an **Appointment** to review at a later time. To do this, you can drag and drop an **Email** to the **Calendar icon** (located in the lower left corner of the interface) to create a **New Appointment** to review **Email** at a later time. The **Email Subject** will define the **Title** and the **Body** of the **Email** will go in the **Appointment Notes**. At this point, all you need to do is set a **Date/Time** and **Save** the **New Appointment**. **Tip**: The value of this feature is to reduce the number of important **Emails** from the **Inbox** and schedule a time to read them when you have time.
Practice Exercise 98 Appointment From Email	**To create an Appointment from an Email:** 1. ***Click on the Email Pane (located in the lower-left corner of the interface).*** 2. ***Select an Email→Drag n Drop the email in the Calendar Pane (located in the lower-left corner of the interface).*** 3. ***Schedule a time to review the Appointment→ Save and Close.***
6.12 New Meeting 	This is located next to the **New Appointment Button** that allows you to invite others to a meeting. You can choose **New Appointment** and then invite attendees. If you click on the "**To**" button, you can add attendees from your global address list or the contacts folder. If you have **Email** addresses, you can type them in on the "**To**" line separated by semicolons.  **Tip**: Keyboard Command **Ctrl** **Shift** **Q** keys- **Create a Meeting Request.**

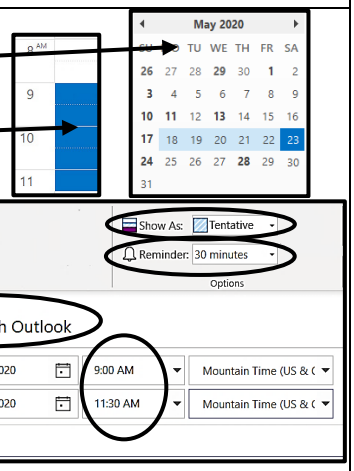
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6.13 New Meeting From Email	This will create a **New Meeting** from an existing **Email** by selecting it and choosing the **Meeting** button. The **Email Subject** will define the **Title**, the sender will go in the **Required** field, and the **Body** of the **Email** will go in the **Meeting Notes**. At this point, you will need to set a **Date/Time** and **Send** the **Email** invitation to all required attendees.
Practice Exercise 99 Meeting From Email	**To create a Meeting from an Email:** 1. ***Click on the Email Pane (located in the lower-left corner of the interface).*** 2. ***Highlight the Email→Home Ribbon Tab→Respond group→Meeting button.*** 3. ***A meeting request is created.*** 4. ***Set a Date/Time for the meeting→Send the Meeting request.***
6.14 Reminders	You can also attach **Reminders** to **Appointments** and indicate an amount of time before the **Appointment** that the **Reminder** will activate. With this option, you can also choose a **Reminder** alarm when the **Reminder** activates.  **Tip**: There are more **Alarm Sounds** located in: **C:\Windows\Media** folder.
6.15 Categorize 	**Meeting** and **Appointments** can be **Color-Coded** and **Renamed**. This can be used to quickly identify them and indicate the type of meeting such as **Personal**, **Work**, **Tradeshow** events, etc. This can be accomplished by pressing the ***Categorize button.*** **Tip: Categories can be customized and Renamed:** ***Opening an existing event→Meeting Ribbon Tab→Tags Group→ Categorize dropdown arrow→All Categories→Rename category.***
Practice Exercise 100 New Appointment	***Calendar Pane→Home Ribbon Tab→New Group→New Appointment:*** ***Title: Test Appointment*** ***Start Time: Any Future Date/Time*** ***Show as: Busy*** ***Reminder: 10 Min*** ***Time Zone: Eastern Time*** ***Categorize: Orange Category.*** 

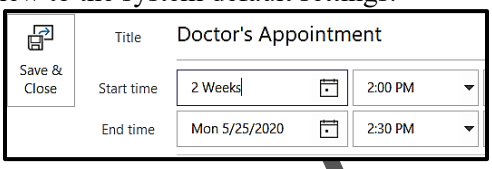
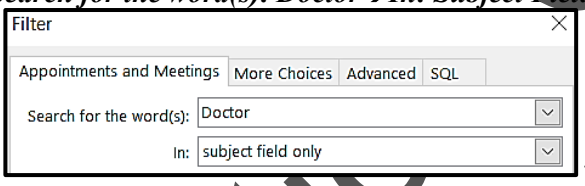
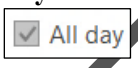
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<table>
<tr><td>6.16 Autodate</td><td>This feature allows you to enter a description of a Date or Time in words, rather than in Date Format. Outlook automatically converts the description to a Date Format for you. This feature is called “Smartdate.”</td></tr>
<tr><td>Practice Exercise 101
Autodate</td><td>Type in all or some of the following in the Date field (not the Time field):


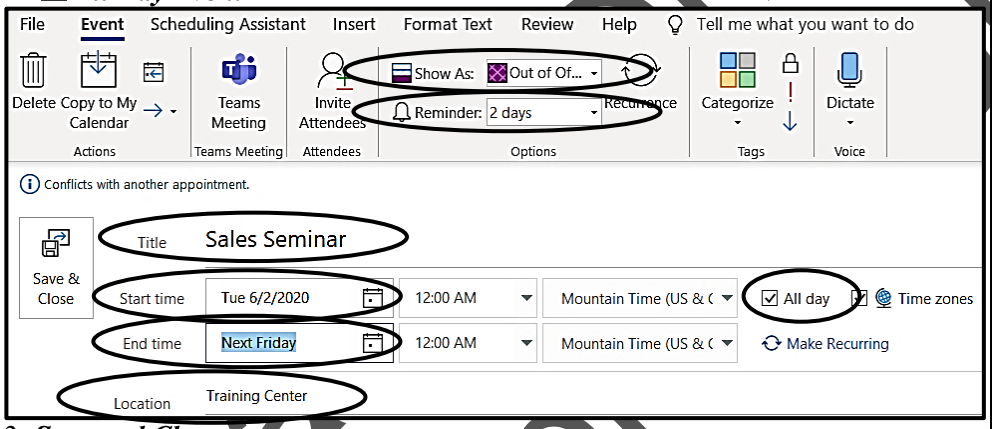
1. One week from today
2. July twenty-third
3. March 28th
4. Yesterday
5. Tomorrow
6. first of September
7. This Fri
8. 2 days from now
9. 60 days after
10. 3 wks ago
11. Next week
12. Christmas
13. Two weeks before Christmas
14. Halloween
15. 3 weeks before 1/1/2009
16. 3rd Tuesday in August</td></tr>
<tr><td>Practice Exercise 102
Autotime</td><td>Type the following in the Time field (not the Date field):


1. Noon
2. Midnight
3. Nine o’clock am
4. Five- twenty P.M.
5. Now
6. Yesterday
7. Tomorrow
8. 1 hour</td></tr>
<tr><td>6.17 Create Event
By Selection</td><td>An Event (Appointment or Meeting) can be created by selecting a time range on the interface. Use your Mouse to select and drag your mouse to create a Time Range.</td></tr>
<tr><td>Practice Exercise 103
Mouse Drag</td><td>1. Calendar Pane →Click the next business day in the Date Navigator.
2. In the middle screen, drag to select from 9:00 am to 11:30 am.
3. Press the Enter key and type the title.
4. Calendar Pane →
Home Ribbon Tab →New Group →
New Appointment:
Title: Research Outlook
Location: Library
Show as →Tentative
Click Reminder →Click 30 Min.
5. Categorize the Button in the Options group → Purple Category.
6. Save and Close.

</td></tr>
</table>

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Practice Exercise 104 *Change View* *To Filter*	This will set the default **Filter** in the **List View** to help you understand the **View Settings Filter** feature. Then, **Reset** the view to the system default settings. 1. ***Calendar Pane→ Home Ribbon Tab→New Group→ New Appointment:*** ***Title: Doctor's Appointment*** ***Start date: 2 weeks from today*** ***Start time: at 2:00pm***  2. ***Save and Close.*** 3. ***View Ribbon Tab→Current View Group→ Change View→List.*** 4. ***View Ribbon Tab→Current View Group→ View Settings→Filter→ Search for the word(s): Doctor→In: Subject Field Only→***  → OK → OK. 5. **Test It:** ***View Ribbon Tab→Current View Group→ Change View→List.*** ***Notice the only event that appears is the Doctor Appointments.*** 6. ***View Ribbon Tab→Current View Group→ Change View→Calendar.*** ***Notice the Calendar View displays all Appointments.*** 7. ***View Ribbon Tab→Current View Group→ Change View→List.*** 8. ***View Ribbon Tab→Reset View.***
6.18 Scheduling All Day Event 	An **All Day Event** is any activity that lasts one day or more. Examples of these **Events** include activities such as trade shows, vacations, and multi-day seminars. They appear as banners that span the top of the date or dates of the event. When other users view your schedule in **Exchange**, events appear as **Busy** time. Check the  checkbox.

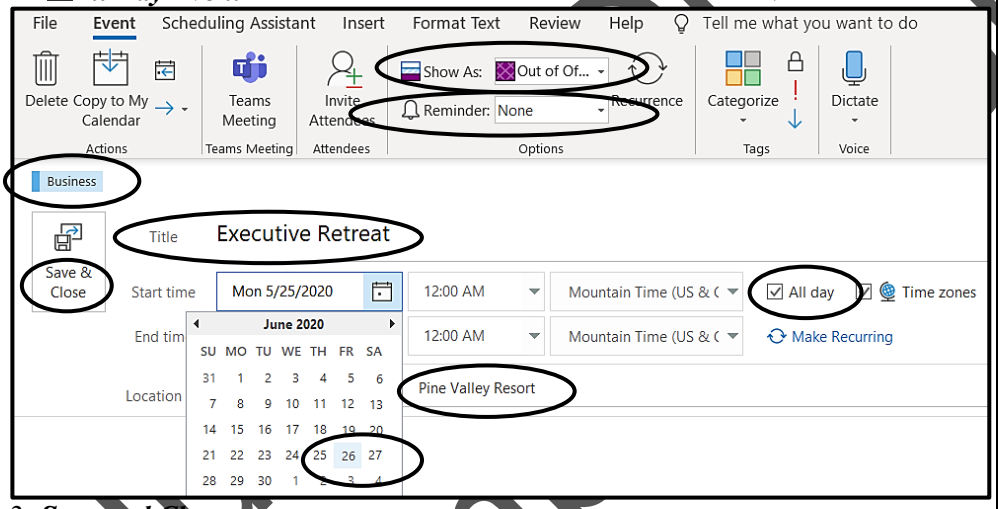
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Practice Exercise 105 *All-Day Event*	1. ***Calendar Pane → Home Ribbon Tab → New Group →*** ***New Appointment:*** 2. **Enter the following All Day Event:** **Title:** ***Sales Seminar*** **Location:** ***Training Center*** **Start time:** ***Next Tues*** **End Time:** ***Next Fri*** **Reminder:** ***2 days*** **Show as:** ***Out of Office*** ☑ ***All Day Event***  3. ***Save and Close.*** **Test It:** View the event in the month, week, and day views.

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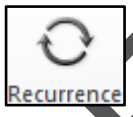
Practice Exercise 106
All-Day Event

1. ***Calendar Pane → Home Ribbon Tab → New Group →***
New Appointment:
2. **Enter the following All Day Event:**
Title: ***Executive Retreat***
Location: ***Pine Valley Resort***
Start time: ***Last Friday of Following Month***
Category: ***Business (See Category concept to rename to Business)***
Reminder: ***None***
Show as: ***Out of Office***
☑ ***All Day Event***

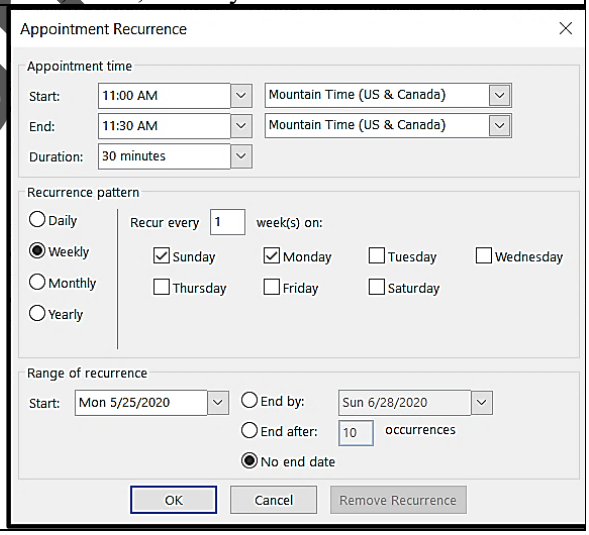


3. ***Save and Close.***
Test It: View the event in the month, week, and day views.

6.19 Recurrence

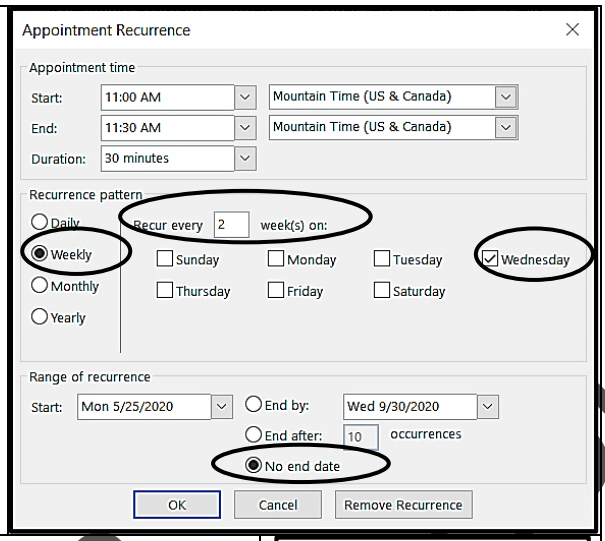


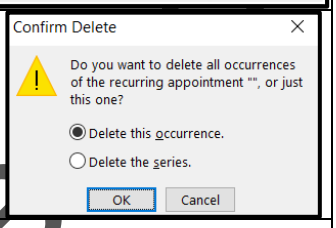
The **Recurrence Button** can be used for both **Appointments** and events that happen regularly which can be daily, weekly, monthly, or yearly. An example of an annual event would include a birthday, holiday, or anniversary. An example of a regular meeting would be a monthly staff meeting, quarterly review, or a weekly planning meeting.

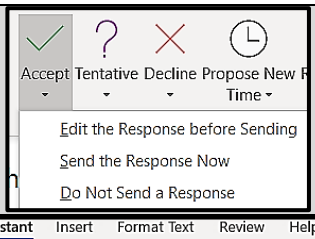


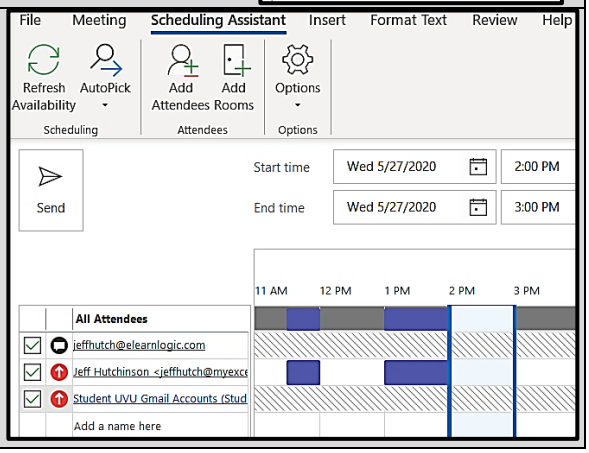
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Practice Exercise 107 *Recurring*	1. ***Calendar Pane → Home Ribbon Tab → New Group →*** ***New Appointment:*** **Title:** ***Meeting*** 2. ***Appointments Ribbon Tab → Options Group →*** ***Recurrence.*** 3. ***Schedule a meeting:*** ***Every other week*** ***Wednesday*** ***No end date.***
6.20 Deleting Calendar Items	You can always **Delete Appointments** and events. **Recurring** items may prompt you to delete all future occurrences or just the one occurrence. When you **Delete** meetings, you are prompted to send a cancellation notice.
Practice Exercise 108 *Delete*	1. ***Select Appointment → Delete key.*** or 2. ***Select an Appointment → Appointment Series Ribbon Tab → Actions Group →*** ***Delete button.***
6.21 Moving Calendar Items	You can move **Calendar** items to different time slots and dates. **Method 1** - Simply drag the item to the new time slot or date. **Method 2** - Open an **Appointment** and change the date or time.
Practice Exercise 109 *Move date*	Drag any **Appointment** to a different date or time. Then, expand the time by dragging the lower edge downward.
6.22 Accepting/ Declining Meeting Requests	As other users schedule meetings, you may receive **Meeting Requests** in your **Inbox**. After you open the **Email**, you have the option of **Accepting**, **Declining**, or submitting a **Tentative** response.
6.23 Scheduling Assistant	The **Schedule Assistant** is used to easily **Schedule Appointments** with multiple participants. When a participant (the person you are inviting) has already scheduled times marked as **Free** or **Busy**, the **Scheduling Assistant** will be able to display when they are available for a meeting. This will allow you to find the best time for your meeting based on their availability.

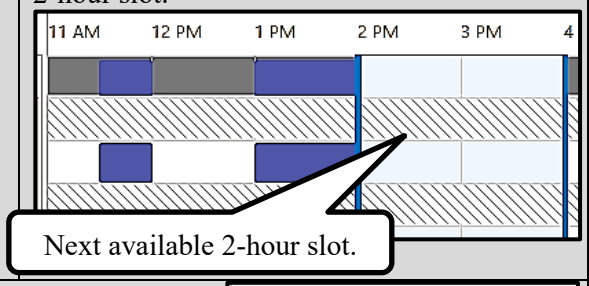
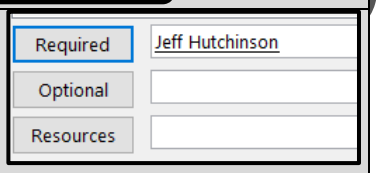
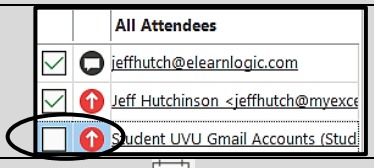








Free Valuation Sample Book

6.24 Refresh Availability	This will **Refresh** the **Attendees Availability** if the **Attendee** has changed their **Calendar** while you are in the **Scheduling Assistant**.
6.25 AutoPick	This will search for the next available date slot if a scheduling conflict occurs. The **AutoPick** tool can automatically locate free time slots for specified invitees. (If you have many **Attendees** the next available slot for all **Attendees** to attend could be weeks out). **Tip:** The **Autopick** feature was not available in **Outlook 2010**. There are meetings scheduled from 11:30-12 and 1-2 below. The **AutoPick** will jump over all meetings to find the next available 2-hour slot. 
6.26 Add Attendees	This will allow you to **Add** additional **Attendees** to a meeting.  **Required** - These are Attendees that are invited and are **Required** to attend **Optional** - These are people that are informed concerning a meeting but are *Not Required* to attend. An example of this can be your boss who needs to know of the meeting but doesn't need to attend. **Resources** - These are conference rooms that do not require a response to the meeting invite.
6.27 Add Rooms	This will provide a list of **Conference Rooms** to add to your meeting. **Tip**: If you are on an **Exchange Server,** the **Conference Rooms** will be available if the **IT** department has set it up.
6.28 Options	There are two options available. ***Click on Schedule Assistant Ribbon Tab → Options →***  1. ☑***Show Only my working Hours:***  This will block the meeting name details. 2. ☑***Show Calendar Details:***  This will show the meeting name details.
6.29 Don't Send Email	If you **Don't** want to **Send** a meeting request to a particular attendee, click the ☐ **Checkbox** next to their name. 
Practice Exercise 110 Group Meeting	1. ***Calendar Pane → Home Ribbon Tab → New Group →*** ***New Meeting:*** **Title:** ***Group Meeting*** 2. ***Click on Assistant Ribbon Tab → Attendees Group →*** ***Add Attendees.*** 3. ***Turn off the*** ☐ ***Checkboxes.*** 4. ***Send.*** 5. ***Uncheck Attendees (so they will not receive an Email notice).***

6.30 Teams Meeting

Microsoft Teams is **Microsoft's** solution to replace **Skype Video Meeting**.

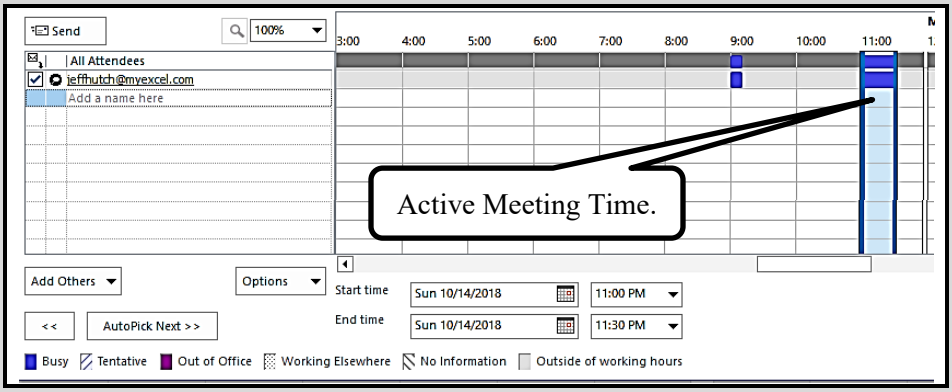
When you create a new meeting, The **Teams** Icon will create a link to have your **Attendees** attend in a **Remote Video Meeting** session. **See the Teams Courseware for more details at:** www.amazon.com/dp/1691229652

6.31 Outlook 2010 Schedule View

The features for **Scheduling Assistant** for **Outlook 2010** is located on the bottom portion of the screen but provides the same functionality.

Calendar Tab→Home Ribbon Tab→Schedule View.

Outlook 2010 View

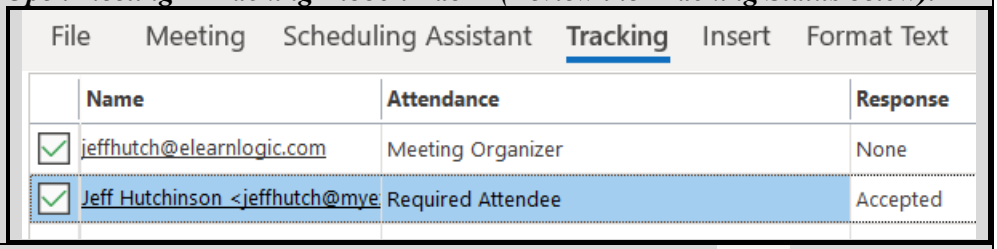


Add Others - This will add additional **Attendees**.
AutoPick - This will find a time slot available for all **Attendees**.
Options - This will reveal a meeting name or keep it hidden.

6.32 View Tracking Status

Responses to meeting requests are delivered to your **Inbox** and can be **Tracked** in the **Meeting Window**. You can access the meeting planner directly:

Open meeting→Tracking Ribbon Tab→ (Review the Tracking Status below).



Practice Exercise 111 Tracking

1. ***Calendar Pane→ Home Ribbon Tab→New Group→ New Meeting:***
   To: Add several names
   Title: Inventory Meeting
   Location: My Office
   Date: Next Thursday
   Time: 8 am
2. ***Send***
3. **Recipient:** ***Open Meeting Request→Accept→ Send Request Now.***
4. ***View Tracking Status: Open Meeting→Meeting Ribbon Tab→Tracking→ View Tracking Status.***

Attendance	Response
Meeting Organizer	None
Required Attendee	None
Required Attendee	None
Optional Attendee	Accepted

6.33 Updating a Meeting

When you **Update** a **Meeting**, you can change the attendees, time, location, or resources for any meeting for which you are the organizer, as well as the status of the meeting. You cannot change information for meetings that you did not organize. ***Open a Meeting→Meeting Ribbon Tab→Change the date and time→***  ***Send Update***

6.34 Canceling A Meeting



You can also **Cancel** a scheduled meeting. When you **Cancel** a meeting that you have already created, and to which you have sent invitations, you should always send **Cancellation** notices to meeting attendees. This will also remove the event from their **Calendar**.

 ***Calendar Pane→Open Meeting→Meeting Ribbon Tab→Actions Group→***  ***Cancel meeting Button***. **Tip: Outboook 2010** icon 

Student Project B1 Recurring Appointments

Create a new **Calendar** and enter the following meetings:

Subject	Time	Start Date	Notes
Return Outlook Review	10-11	Next Monday	Single Event Only
Lunch Time Reminder	12-1	Next Monday	MTWTF
Group Meeting	1-3	Next Thursday	Every Other Thursday
Dept. Meeting	10-12	Next Friday	Every 3 weeks on Fri
Weekly Planning	8-9	Next Monday	Every Monday Morning
Project Meeting	10-11	Next Friday	1st Friday of Every Month
Process Improvement	4-5	Next Wednesday	3rd Wednesday of Every Month
Financial Review	3-4	Next Friday	Last Friday of Every Month
Manager Meeting	1-4	Next Wednesday	4th Wednesday
Pay Bills Reminder	8-9	Next 15th	15th of Every Month

Student Project B2 Extra Credit

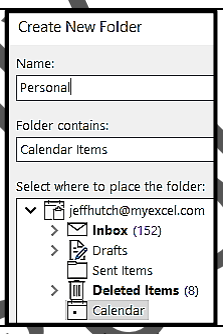
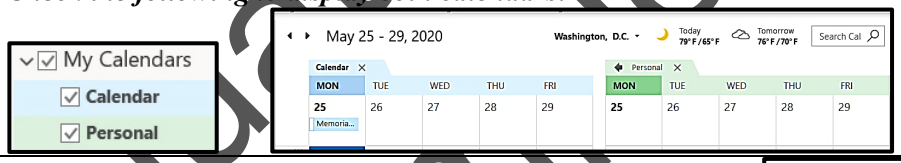
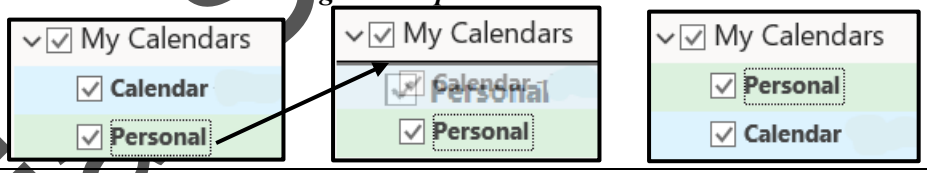
These are additional **Appointments** that may be more difficult to schedule. In some cases, they can't be scheduled using the standard **Calendar** tools.

Subject	Time	Start Date	Notes
Department Holiday	1-5	Friday	2nd Friday in December
Regular Status Meeting	10-11	Next Tuesday	Tuesday & Thursday End of Every Month
MFG Meeting	2-3	Next Thursday	Quarterly Meeting occurring the 5th Thursday of Every Month
HR Meeting	9-10	Next Friday	2nd & 4th Friday Every Month

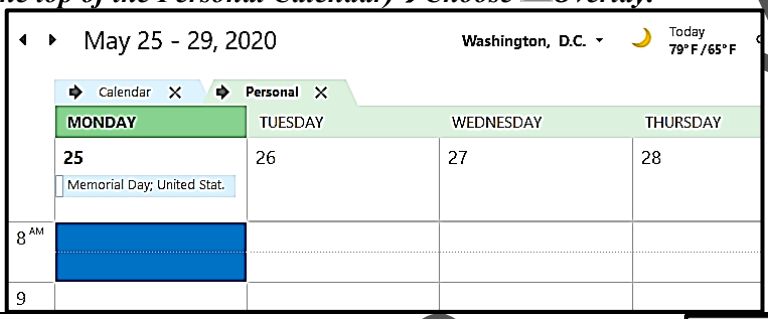
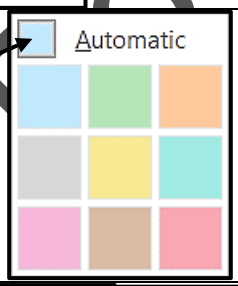
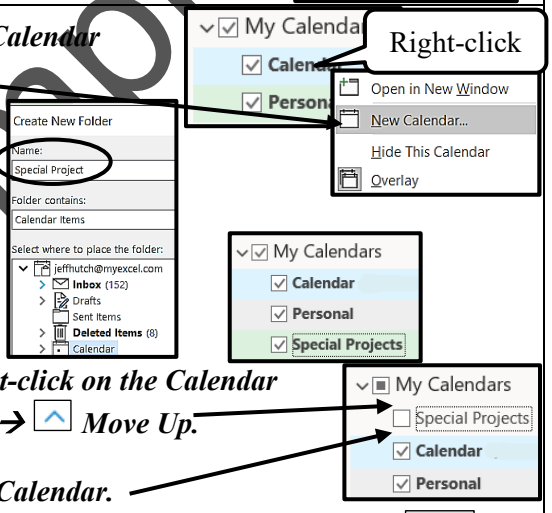
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Section 3: Multiple Calendars

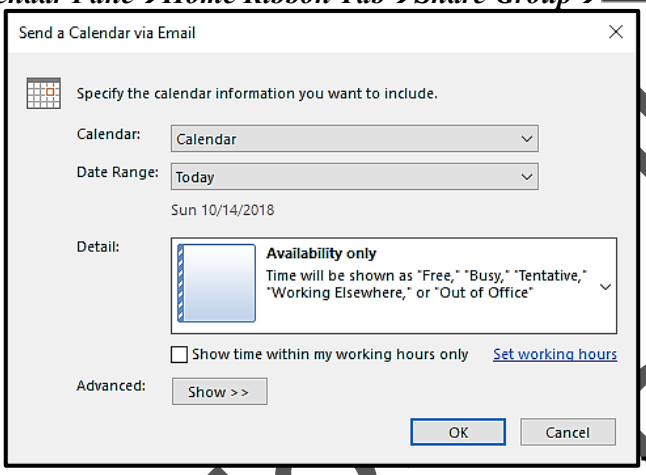
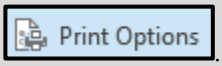
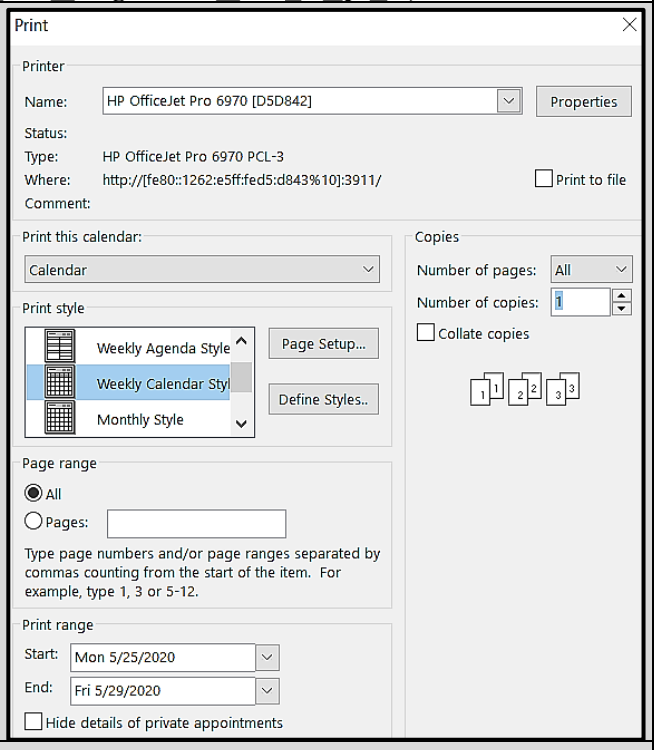
Multiple Calendars can be used for different events such as personal, work, tradeshow, group scheduling, department vacations, etc. These **Calendars** can be placed side-by-side or placed on top of each other (overlay) to see how they relate to each other. You can also share **Calendars** with others and put personal events on a different **Calendar**.

Concept	Explanation / *Command string in italic.*
6.35 Create Secondary Calendar 	A **Secondary Calendar** can be used for different events such as personal, work, tradeshow, department vacations, etc. 
Practice Exercise 112 *New Calendar*	***Folder Ribbon Tab →New Group →***  ***New Calendar →*** **Name: *Personal.***
6.36 Viewing Side-by-Side Calendars	This will allow you to display multiple **Calendars** side-by-side by pressing the check mark on the left pane. You can display up to 30 **Calendars** side-by-side.
Practice Exercise 113 *View Calendar Side-By-Side*	Display both **Main Calendar** and **Personal** (from the previous practice exercise) **Calendars Side-By-Side** on the same screen. ***Check the following to display both calendars:*** 
6.37 Change Calendar Order	The order of the tabs on the top can be adjusted by changing the order listed on the left pane. This can be done by dragging the **Calendar** to change positions or **Right-clicking** and choosing **Move Up** or **Move Down.** 
Practice Exercise 114 *Change Calendar Order*	To change **Calendar** order: ***Select one Calendar and Drag and drop to the new location.*** 

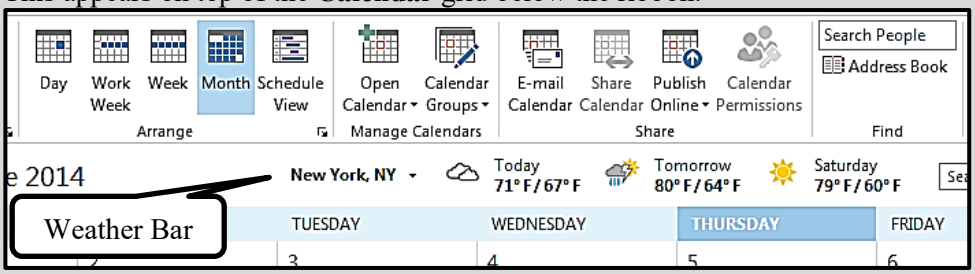
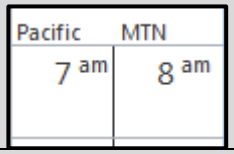
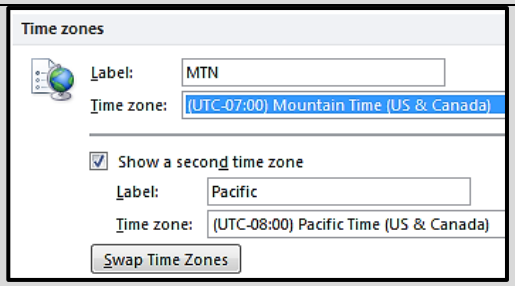
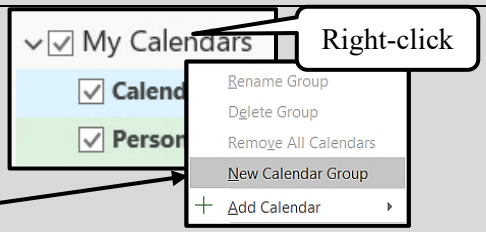
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6.38 Overlay Calendars	Several **Calendars** can be placed on top of each other to see how the events interrelate. For example, you might have a **Work Calendar** that is shared with other co-workers and a **Personal Calendar** you don't want others to see. You want to **Overlay** the **Calendars** to see if any event conflicts.
Practice Exercise 115 Overlay	***Display both Calendars side-by-side → Right-click on the Personal Tab (located on the top of the Personal Calendar) → Choose Overlay.*** 
6.39 Calendar Color	Each **New Calendar** is assigned a default color. When you create an event, this will be the default color. **The color can be changed by:** ***Right-clicking on the Calendar → Color*** 
Practice Exercise 116 New Calendar	1. ***Calendar Pane → Right-click Calendar Check box → New Calendar.*** 2. **Name:** ***Special Project →*** OK 3. **Change Default Color:** ***Right-Click on Special Projects → Change it to Light Pink.*** 4. **Overlay several Calendars:** ***Right-click on the Calendar Tab → Overlay.*** 5. **To change Calendar order:** ***Right-click on the Calendar Check (located in the Left Screen → Move Up.*** 6. ***Uncheck the Special Projects Calendar.*** 7. ***Right-click the Special Projects Calendar → Delete Calendar →*** Yes. 

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6.40 Emailing Your Calendar As A Snapshot	**Outlook** allows you to send a **Calendar** or **Calendars** to other people in an **Email** message. The **Calendar** appears within the body of the message as a **Calendar Snapshot**. You can specify which **Calendar** to send and the level of detail that you wish to display to the **Email** recipient.
Practice Exercise 117 *Email Calendar*	***Calendar Pane→Home Ribbon Tab→Share Group→ Email Calendar***  → OK → ***To: (Email to yourself)→ Send.*** ***(Double-click the Email containing the Calendar Snapshot)***
6.41 Printing Calendar Information	You can **Print Calendar** information and individual **Calendar** items in daily, weekly, monthly layout, trifold, or **Calendar** details style. ***File Tab→Print→***  
Practice Exercise 118 *Print*	***Calendar Pane→File Tab→Print→Scroll the Print style list box as necessary and click Monthly Style→*** OK .

Faculty Book

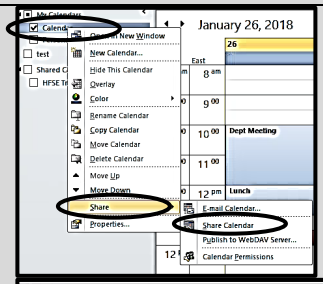
6.42 Weather Bar	This appears on top of the **Calendar** grid below the ribbon.  **Tip:** This feature is not available in **Outlook 2016** but is available in **Outlook 365.**
6.43 iCalendar	**iCalendar** is a standardized **Calendar** format used to send to recipients. ***Open Calendar item →Appointment →Forward →Forward as iCalendar.***
6.44 Additional Time Zone	***File Tab →Options →Calendar → Time Zones →*** ☑ ***Show a second time zone*** The **Second Time Zone** will be displayed in the **Calendar** day view as follows:  
6.45 Add Holidays	***File Tab →Options →Calendar →Calendar Options →*** Add Holidays... ***button.***
6.46 Calendar Groups	This will allow you to **Group** multiple **Calendars** into a single category. For example, if you were managing several **Calendars** for a specific purpose, you could **Group** those **Calendars**. ***Right-click on MyCalendar →*** ***New Calendar Group.*** 

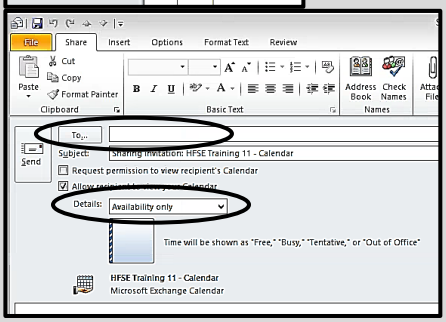
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Section 4: Exchange Features

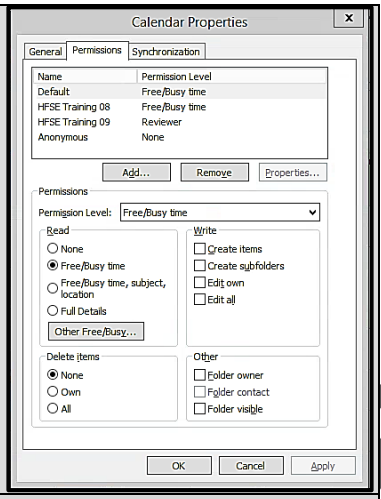
Exchange is an **Email** server used in conjunction with **Outlook**.

Concept	Explanation / *Command string in italic.*
6.47 Room Finder	**Outlook** does the work for you by looking through the availability of all recipients listed, and automatically suggests the best times everyone can meet.
6.48 Autopick **Outlook 2013/2016**	If a scheduling conflict occurs, the **AutoPick** tool can automatically locate free time slots for specified invitees. You can use **AutoPick** for all required invitees and one resource. **Tip**: The **Autopick** feature is not available in **Outlook 2010**.
6.49 Free And Busy times	A planner displays **Free And Busy Times** for every attendee invited to a meeting. If a time slot is blank, the attendee is free. If a time slot is colored, the attendee is either busy or tentatively busy. You can right-click on any attendee's busy time slot in the planner for more information concerning that attendee's schedule.
6.50 Delegation/ Folder Permissions	You can set **Permissions** of who can view your **Calendars** in an **Exchange** Environment. ***File Tab →Account Settings →Delegates Access →*** Add.
6.51 Shared Calendars	If you are working in a network environment, you can access other users' **Calendars** and allow them to access yours. The events will appear as **Busy**, **Tentative**, **Out of Office**, No Information, and Outside of working hours. 1. ***Calendar Pane →Right-click on Calendar →Share →*** ***Share Calendar →*** ***To: (User name) →*** ***Details: Availability*** ***Limited Details*** ***Full Details*** ***→ Send →*** Yes. 2. ***Go to the new user account →*** ***Open Email sent →*** ***The info bar will provide a message →*** ***Open this Calendar Button.***





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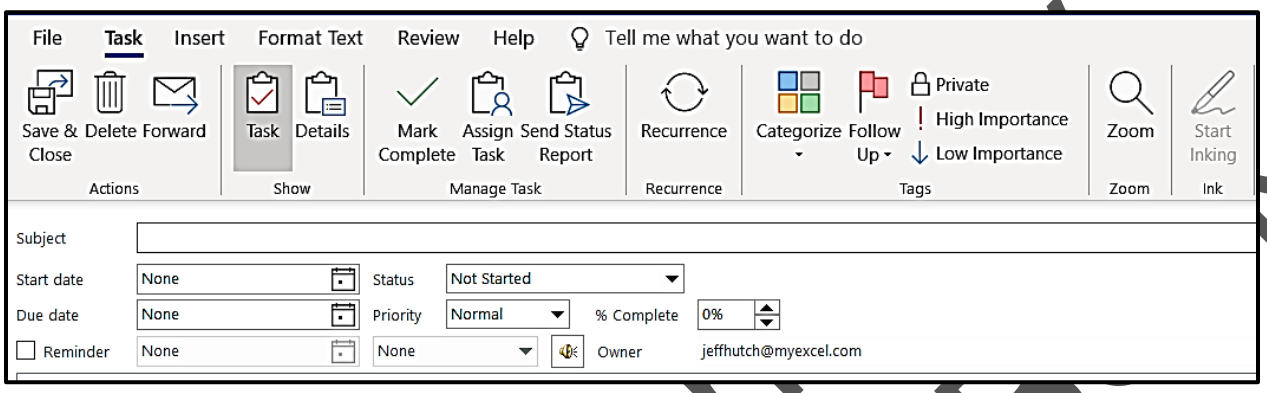
6.52 Calendar Properties	***Right-click on the Calendar (located under the mini-calendar) → Properties → Permissions →*** ***Here you can fine-tune the Permissions.*** **Tip:** The default Permissions will give large groups access. ***File Tab →Other user's folder →*****Name:** ***(Enter Name) →Folder Type: Calendar →*** OK **.** 
6.53 Resources or Conference Room	If an **Exchange** server is set up properly, **Conference Rooms** can be added as a **Resource**. When you invite a **Resource** to a meeting, it is automatically scheduled. If the **Resource** is free, it will accept the meeting. However, if the **Resource** is not free, it will automatically reject the invitation. A **Resource** can be a room, **Projector**, or **Equipment.**
6.54 Free and Busy Times	A planner displays the **Free And Busy Times** of every attendee invited to a meeting. If a time slot is blank, the attendee is free. If a time slot is colored, then the attendee is either **Busy** or tentatively **Busy**. You can right-click on any attendee's busy time slot in the planner for more information concerning that attendee's schedule.
6.55 Set Free/Busy Time Options	***File Tab →Options → Calendar →Calendar Options →Free/Busy Options Button***. **6.35 Set Free/Busy Time Options**
6.56 Calendar Groups	This allows you to combine multiple people's **Calendars** into a single consolidated **Calendar**. You must have the rights to access other's **Calendars** on **Exchange**. ***Calendar →Calendar Groups →Create New Calendar Group →Add other users from Exchange.***
6.57 Creating Group Calendars	**Group Calendars** can be created for a particular **Group** or team of people and/or resources. When you want to plan a meeting, you can open the **Group Calendar**, view the availability of everyone in the group at a single glance, and then schedule a meeting.
Practice Exercise 119 Group Calendars	***Calendar Pane →Right-click on My Calendar →New Calendar Group.***
6.58 Calendar Permissions	This will allow others on **Exchange** to view your **Calendar**. ***Calendar →Right-click on the desired Calendar →Permissions Tab → Permissions/Level: Reviewer.***
6.59 Open Other Users Folder	***File Tab →Open →Open Outlook Data File →*****Name:** ***(User Name) →****Folder Type: Calendar*

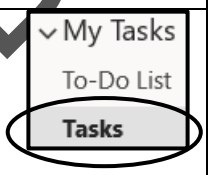
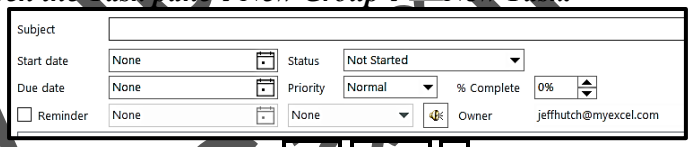
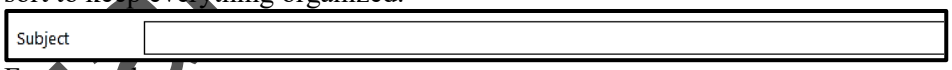
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Chapter 7 - Tasks Pane

This will keep track of important action items or things to do. This can be done using paper lists or a spreadsheet, but **Outlook** will provide **Reminders** and **Tracking**. There are two major classic features such as **Tasks** and recently added **To-Do Lists.**

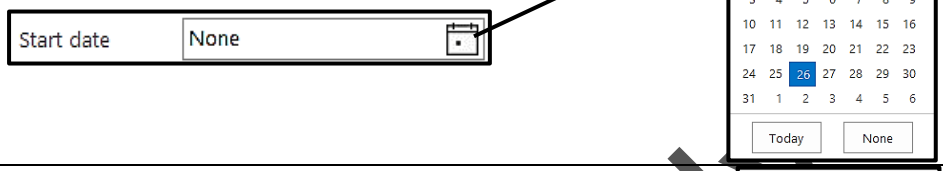


Concept	Explanation / *Command string in italic.*
7.1 Tasks	Open the **Task** pane to view defined **Tasks** and **To-Do Lists**. ***Click the Tasks icon (located in the lower-left corner of the interface)→Click Tasks on the left side of the Tasks Pane.*** **Tip:** If the **Tasks** icon is not listed, click on the 3 dots → **Task.** 
Practice Exercise 120 *New Task*	**To create a New Task:** ***Open the Task pane→New Group→ New Task.***  **Tip**: Keyboard Command **Ctrl Shift K keys - Create a New Task.** Keyboard Command **Ctrl N** keys - **Create a New Task (in the Task Pane).**
7.2 Subject	When entering **Tasks** to keep track of day-to-day activities, it might be helpful to name the **Task Name** (subject) based on group or prioritization**.** Then, you can sort to keep everything organized.  For example: Starting a **Task** name with the number 1 could indicate Follow-up **Tasks.** Example: 1-Follow-up with Janet. Starting a **Task** name with the number 2 could indicate personal actions. Example: 2-Call son's 4th-grade teacher. Starting a **Task** name with the number 3 could indicate work action items. Example: 3-Complete software project. Also, instead of using numbers, you can use words such as Follow-up, Personal, Work, etc.
Practice Exercise 121 *Group*	***Come up with a system that makes sense to you to keep your Tasks organized.***
	Group 1
	Group 2
	Group 3

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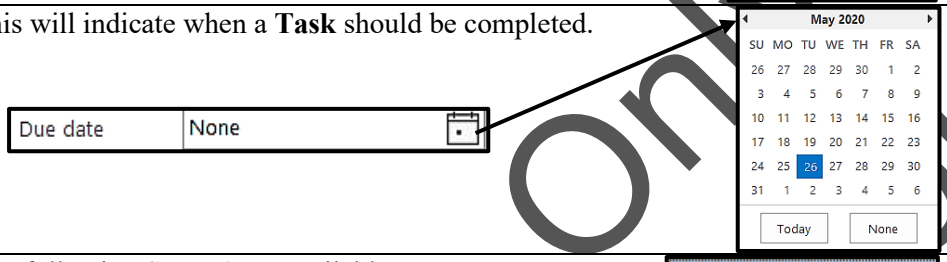
7.3 Start Date

When you create a **Task,** you have the opportunity to establish when the **Task** will begin.



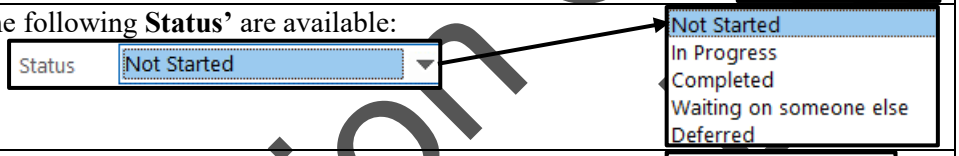
7.4 Due Date

This will indicate when a **Task** should be completed.



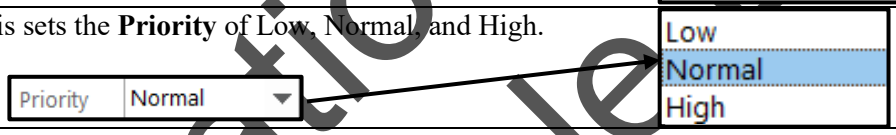
7.5 Status

The following **Status'** are available:



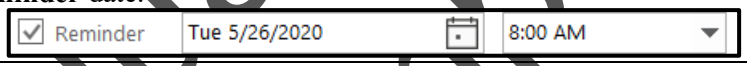
7.6 Priority

This sets the **Priority** of Low, Normal, and High.



7.7 Reminder

Each **Task** can set a **Reminder** to notify you of a completion date or any **Reminder** date.

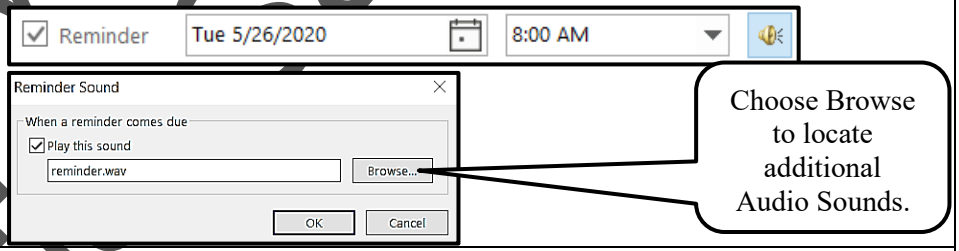


7.8 Sound Reminder



Sound Audio Clips can be added to the **Reminder** to play when due.
Tip: Additional sounds can be found in **C:\Windows\Media folder.**

Open a Task → Click on the ☑ Reminder checkbox → Click the Sound icon.



7.9 Percent Complete

The Percentage of increments are 25%, 50%, 75%, and 100%, but you can also type in any value desired.

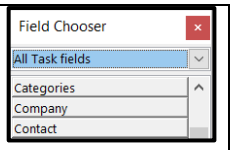
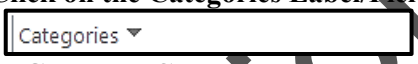
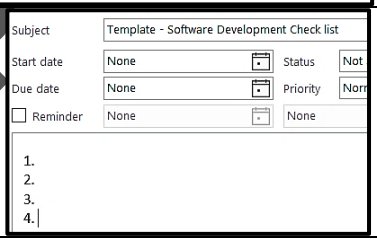


7.10 Owner

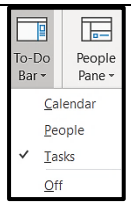
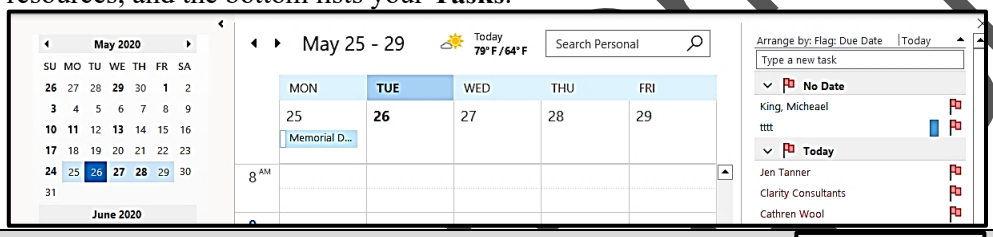
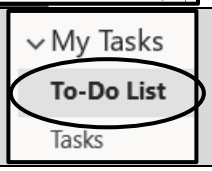
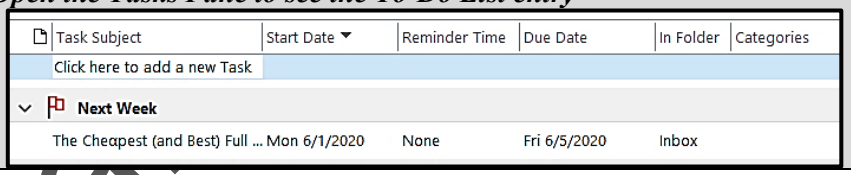
An **Owner** is the person who created a **Task**.



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7.11 Categories	You can use the **Categories** feature to prioritize your **Tasks**. You can also assign a color to a **Task** and sort by color **Category**. Once you assign a **Color Category** to a **Task,** the **Task Category** can be sorted by clicking on the **Categories Label/Field Name**. **To add the Category to the interface:** ***Right-click on any Label/Field Name→ Field Chooser→All Task Fields→Categories.*** 
Practice Exercise 122 *Calendar* *Category*	1. **To assign a Task to a Category in the main screen:** ***In Tasks Pane→Select the desired Task →Home Ribbon Tab→ Tags Group→ Category Button →(Choose Category)*** 2. **To assign a Category to an opened Task:** ***Open a Task→ Tasks Ribbon Tab →Tags Group→ Category Button→ (Choose Category)*** 3. **To sort Categories in the main interface:** **Click on the Categories Label/Field Name:**  4. **To Group by Category:** ***View Ribbon Tab →Arrangement Group→ Categories.***
7.12 Text Area	You can enter **Notes** to describe a **Task** more clearly. 
7.13 Copy Task	You can simply **Copy and Paste** a **Task** to create a new, similar **Task**. This will, in turn, create a template of action items for future reference. 
7.14 Assign A Task	**You can assign a Task to a different person**. Click on the **Assign Task** button and entering an **Email** address. **Once you assign a Task, the following can be accomplished:** **Reply To A Task Request** - When you receive a **Task** request from another person, you must **accept or reject** the **Task** request. **Sending Task Update** - You can press the **Update Button** to a previously assigned and accepted **Task** requesting an update. An **Email** will automatically be sent. **Tracking Assigned Tasks** - When a **Task** is complete, the recipient marks it as complete and an **Email** will be automatically be sent to you indicating it is complete. A status will then be updated in your **Task** as complete.

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Practice Exercise 123 *Assign Task*	***Open a Task → Task Ribbon Tab → Manage Task Group →***  ***Assign Task.***
7.15 To-Do Bar	You can display a **Daily Task List** in your **Outlook Calendar** or **Email** interface**.** This useful integration lets you view your **Tasks** in conjunction with **Appointments** in your **Calendar.** The **Daily Task List** displays **Tasks** requiring follow-up action for the current date. **Tasks** that are not marked as complete will be carried forward. If you check all three checkboxes, it will display a **Calendar** on top to show your **Appointments**, **People** (**Contacts**) will provide quick access to resources, and the bottom lists your **Tasks**.  
7.16 To-Do List Tasks	You can view all your **To-Do Lists** on the **Tasks Pane** by opening it and choosing the **To-Do List**. These are created automatically when you mark an **Email** or **Contact** with a **Follow-up Tag**. 
Practice Exercise 124 *Display* *To-Do List*	View and use the **Daily Task List** with your **Calendar.** ***Select the***  ***Calendar Button located in the lower-left corner of the interface →*** ***View Ribbon Tab → Layout Group →***  ***To-Do Bar →*** ✓ ***Tasks.*** This will display **Tasks** on the right side of the **Tri-Pane** layout.
Practice Exercise 125 *Create To-Do* *Item*	1. ***Click the***  ***Email icon (located in the lower-left corner of the interface).*** 2. ***Select an Email → Home Ribbon Tab → Tags Group →***  ***Follow Up dropdown arrow →***  ***Next Week.*** 3. ***Open the Tasks Pane to see the To-Do List entry*** 
7.17 Create Task From Email	This can be useful if you need to follow-up on an **Email**. A copy of the **Email** message will be placed in the **Task Notes** field.
Practice Exercise 126 *Drag n Drop* *Email*	1. ***Go to the Email Pane → Identify Email.*** 2. ***Drag n Drop Email message to the Task Pane.*** 
7.18 Add Task To Calendar	This can be useful if you need to follow-up on an **Email**. A copy of an **Email** message will be placed in the **Task Notes** field.
7.19 Attach File To Task	This can be useful if you have documentation related to a **Task**.

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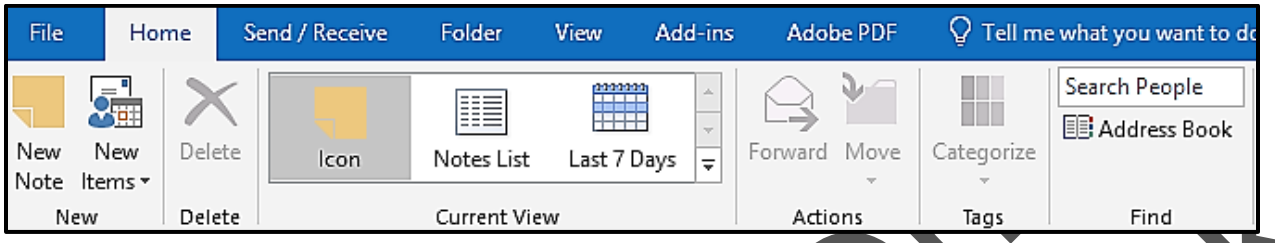
7.20 Share Task	This will allow you to **Share** a **Task** by providing a Link. **Tip**: You can only send the **Link** to a **Microsoft Account** such as Outlook.com, Hotmail.com, or Live.com.
Practice Exercise 127 *Share Task*	1. ***Open the Task Pane and select the To-Do pane.*** 2. ***Right-click on the Task you want to Share→Share Task List.*** 3. ***Choose Create Invitation Link→Create sharing invitation→Copy link.*** 4. ***Open the Email Pane→Paste the link in the body of the message.*** **To stop Sharing:** ***Right-click→Sharing options→More options→Stop Sharing.***
7.21 Save And Close	You must **Save** and **Close** a **Task** in order to finalize it.

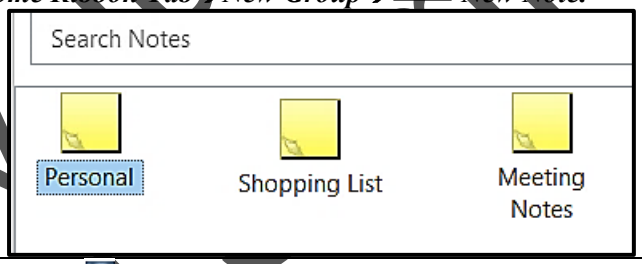
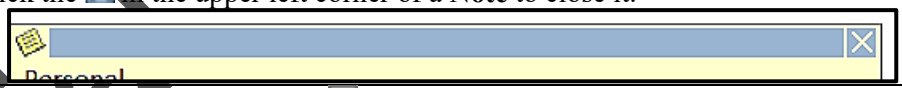
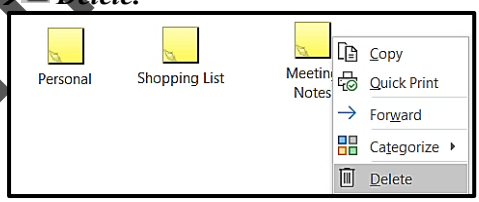
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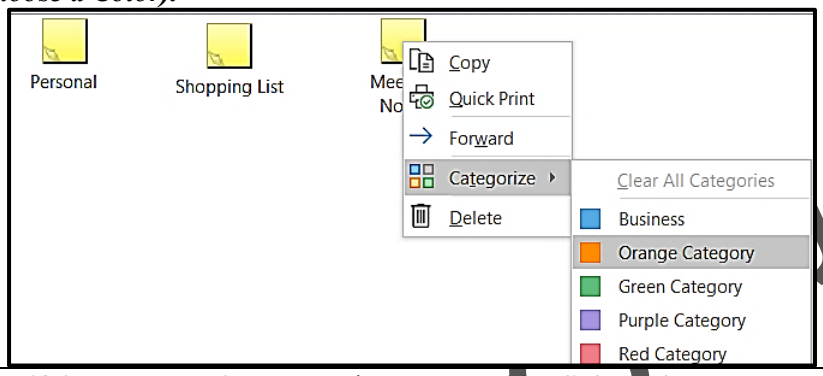
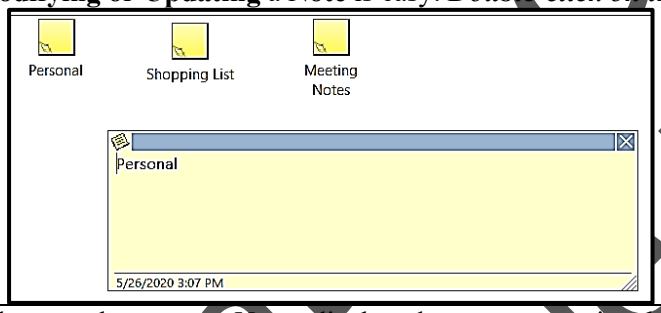
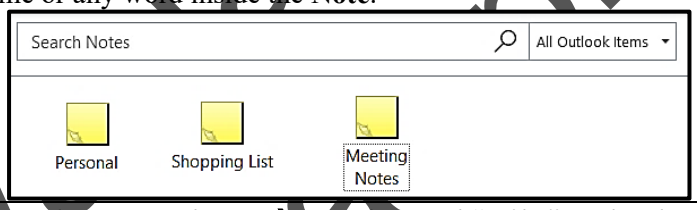
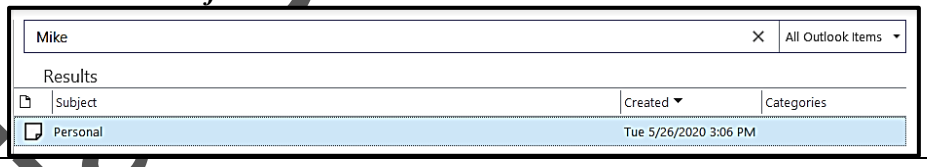
Chapter 8 - Notes Pane

This is a way to keep a list or take **Notes** in a **Meeting**. It is a quick, easy tool to use.



Concept	Explanation / *Command string in italic.*
8.1 Notes	Click the **Notes** button in the lower-left corner of the **Navigation Pane**.
8.2 Note Name	The first word in the **Note** will become the name of the **Note**.
Practice Exercise 128 *New Note1*	***Home Ribbon Tab→New Group→***  ***New Note.*** or ***Double click on the body white work area.*** **Tip**: Keyboard Command **Ctrl** **Shift** **N** keys - **Create a Note.** Keyboard Command **Ctrl** **N** keys - **Create a New Note (in the Notes Pane).**
Practice Exercise 129 *New Note2*	**Create the following Notes:** ***Home Ribbon Tab→New Group→***  ***New Note.*** 
8.3 Close Note	Click the  in the upper left corner of a **Note** to close it. 
8.4 Delete Note	**Option 1 -** ***Right-click on the***  ***Note icon (located on in the lower left corner) →*** ***Delete.***  **Option 2 -** ***Home Ribbon Tab→Delete Group→***  ***Delete.*** **Option 3 -** ***Select the Note→Press the*** **Delete** ***key.***

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8.5 Color A Note	You can **Color-Code** your **Notes**. ***Right-click→Categorize dropdown arrow→ (choose a Color).*** 
8.6 Modify A Note	**Modifying or Updating** a **Note** is easy: ***Double-click on the Note.*** 
8.7 Search Note	When you have many **Notes** displayed, you can type in a keyword to **Search** for a name or any word inside the **Note**. 
Practice Exercise 130 Search Note	***Open the Personal Note→Type the word "Mike" under the word Personal→ Close the Note by pressing the ☒ in the upper right corner→Type the word Mike in the Search field.*** 

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Appendix A - Rules Wizard

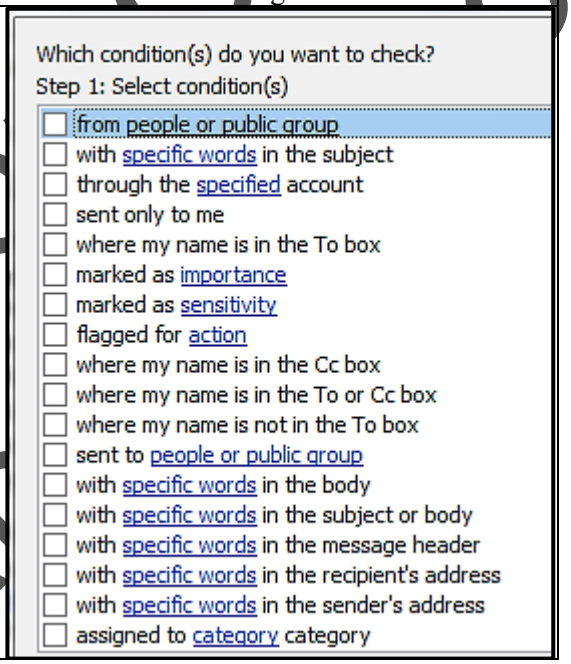
Rules will allow you to find incoming or outgoing **Emails,** manipulate them or move them to a specified folder.

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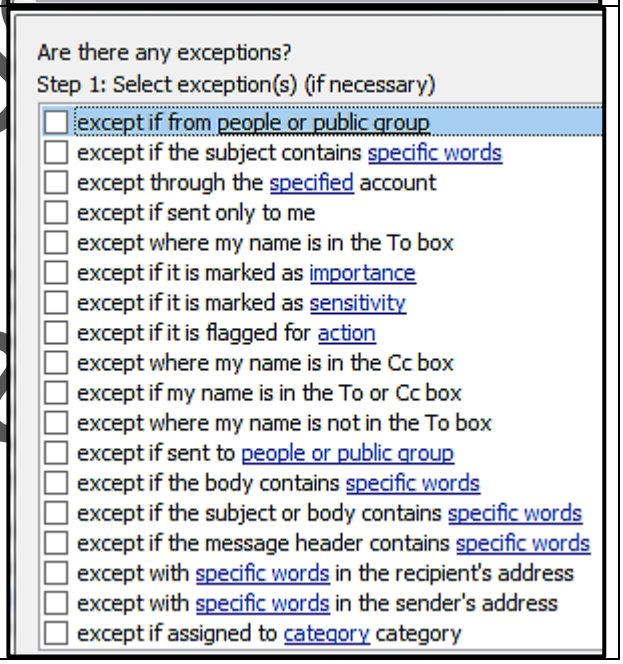
[Section 1 - Core Concepts]
[Section 2 - Exchange Features]

Section 1 - Core Concepts

Concept	Explanation / *Command string in italic.*
A.1 Start From A Blank Rule	You can start a **New Rule** and apply it to either a message you are **Sending** or **Receiving.** The **Rule** will be applied to all accounts receiving **Email**.
A.2 Condition	You need to select only one option because when you add multiple criteria, you must meet all **Conditions** in order for the action to occur. If a **Rule** has several criteria in one **Condition**, then it generates an OR **Condition** and any criteria can be true. The following are the most commonly used: 1. **From people or public group.** 2. **With specific words in the subject.** 3. **With specific words in the Body.** 4. **With specific words in the subject or body.** 5. **With specific words in the message header.**



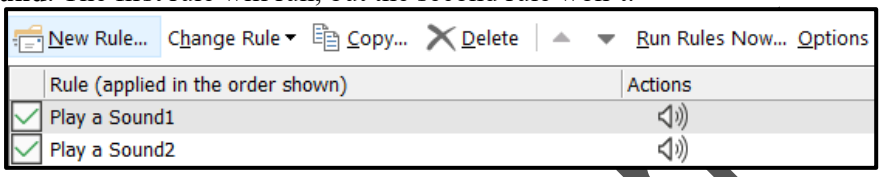
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A.3 Action	This is what you are going to do with the message once you have selected a **Condition**. The following are the most commonly used options: 1. **Move it to a Specified Folder.** **2. Assign it to the category.** **3. Delete it.** **4. Forward it to people or public group.** **5. Mark as important.** **6. Play a sound.**	
A.4 Exception	**Exceptions** are usually not set, but are available. We rarely have **Exceptions.** However, if the wrong Email is processed, then you might look at what options are available.	

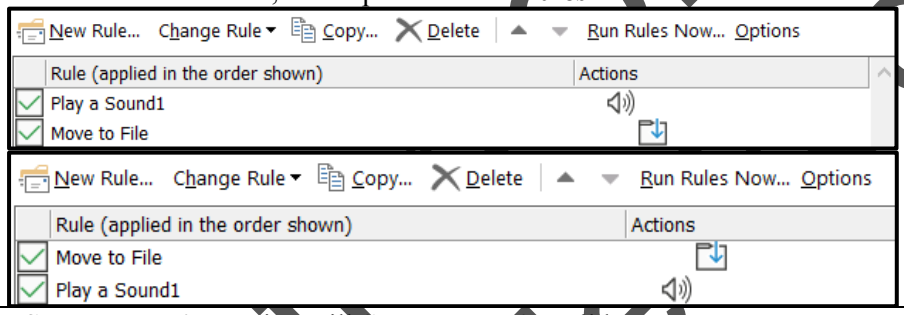
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A.5 Order of Processing

Outlook Processes Rules from top to bottom. If two **Rules** conflict using the same attribute such as color, the first **Rule** will win. It will process two **Rules** as long as it is not using the same attribute.
The following example below shows two rules using the same attribute of **Play a Sound**. The first rule will run, but the second rule won't.

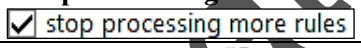


In the two examples below, it doesn't matter which order they are in because once the condition is identified, it will process both **Rules**.



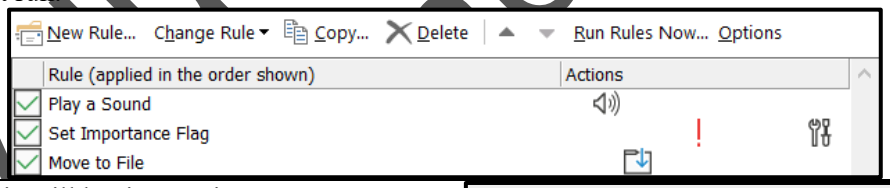
A.6 Stop Processing

The **Stop Processing** action will **Stop Processing** all later **Rules.**



Practice Exercise 131 Stop Processing

Rule 2 (below) has a **Stop Processing Rule** which means the third **Rule** will not run.

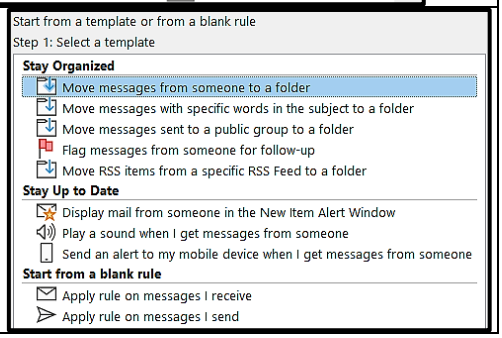


A.7 New Rule

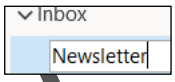
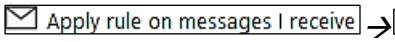
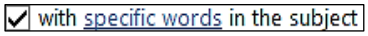
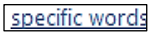
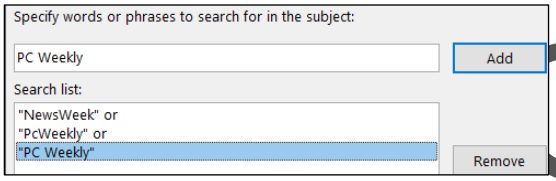
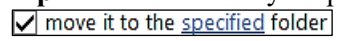
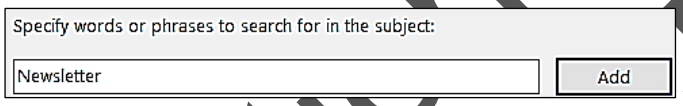
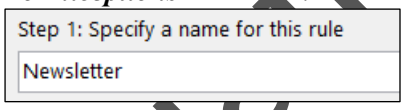
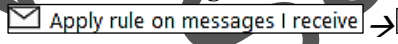
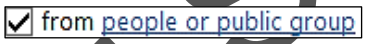
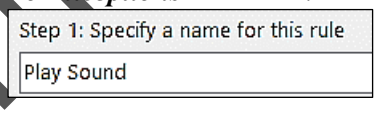


This will begin creating a **New Rule** based on one of the defined criteria. Usually, we will use the:
Apply rule on messages I receive.

File Tab→Manage Rules and Alerts →New Rule→



Partial Sample Book

Practice Exercise 132 *Specified Folder*	As you sign-up to various monthly newsletters (such as Newsweek, PCWeekly, New York Times), these monthly newsletters, over time, become a weekly **Email** message once they have your **Email** address. To reduce the volume of **Email**, you can move these to a **Folder** that can be read at your leisure. **Move the Email as it is received from a sender to a specific folder:** 1. ***Create a folder under the Inbox called Newsletter.***  2. ***File Tab →Manage Rules and Alerts →New Rule →***  3.  ***→Click***  ***in the lower section →***  →Add →OK →Next >. **Tip**: Notice PCWeekly is spelled 2 different ways to catch all occurances. 4.  ***→Click***  ***in the lower Section →***  →Add →Next >. 5. ***No Exceptions →*** Next >.  6. →Finish. **Test It:** ***Send Email from Email account A to Email account B →*** ***Title: Newsletter →Send (you should see the Email in the Newsletter folder).***
Practice Exercise 133 *Play Audio*	**Play** a specified **Audio** notification when you receive an **Email** from a specific sender. For example, if you work with specific people that require a level of urgency, then a **Sound** will alert you to urgent **Email**. 1. ***File Tab →Manage Rules and Alerts →New Rule →***  2.  ***→Click***  ***in the lower section →***  →OK →Next >. 3.  ***→Click***  ***in the lower section →*** ***C:\Data\Outlook365-1\tada.wav →*** Open →Next >. 4. ***No Exceptions →*** Next >.  5. →Finish. **Test It:** ***Send Email from jeffhutch@elearnlogic.com →*****Subject:** ***Play Sound →Send (you should hear the sound, Tada).*** **Tip:** An alternate location for sound files **C:\Windows\Media\.**

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Practice Exercise 134 *Category*	Assign a **Category** to an **Email** from a specific sender. For example, if you use the **Category** feature to segregate **Emails**, then this is a way to **Categorize** your **Email** automatically. 1. ***File Tab →Manage Rules and Alerts →New Rule →*** Apply rule on messages I receive → Next >. 2. from people or public group → ***Click*** people or public group ***in the lower section →*** From jeffhutch@elearnlogic.com → OK → Next >. 3. assign it to the category category ***→Click*** category ***in the lower section → (Choose Category) →*** OK → Next >. 4. ***No Exceptions →*** Next >. 5. Step 1: Specify a name for this rule: Assign Category → Finish. **Test It:** ***Send Email from jeffhutch@elearnlogic.com →Subject: Assign Category →Home Ribbon Tab →Filter Email →Categorized → (Choose Category).***
Practice Exercise 135 *Forward*	**Forward** any message from a specific sender to another person automatically. For example, if you are out of the office and important **Email** must be processed by someone, then this is a great option. 1. ***File Tab →Manage Rules and Alerts →New Rule →*** Apply rule on messages I receive → Next >. 2. from people or public group → ***Click*** people or public group ***in the lower section →*** From jeffhutch@elearnlogic.com → OK → Next >. 3. forward it to people or public group → ***Click*** people or public group ***in the lower section →*** To studentab1@gmail.com → OK → Next >. 4. ***No Exceptions →*** Next >. 5. Step 1: Specify a name for this rule: Forward to studentab1 → Finish. **Test It:** ***Send Email from jeffhutch@elearnlogic.com → Subject: Forward to Studentab1 →Send.***

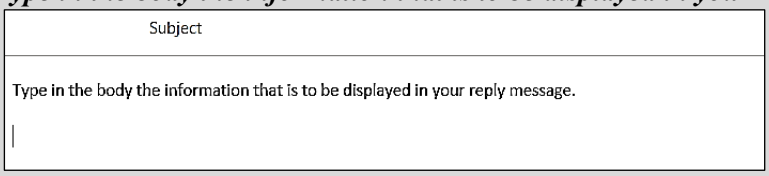
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Practice Exercise 136 Reply with Template

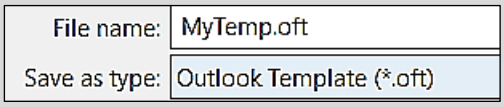
If reading **Email** is your primary responsibility, then this feature could be used to quickly communicate with your customers. Here, you can **Automatically reply to a sender** using a keyword in the subject. This can be used to provide information to customers quickly such as a help desk stating the support response commitments or to provide documentation based on keywords.

Define an **Automatic Reply Template**:

1. ***Home Ribbon Tab →New Email.***
2. ***Format Text Ribbon Tab → Format Group→*** Aa Plain Text →
3. ***Type in the body the information that is to be displayed in your reply message***



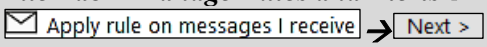
4. ***File Tab →Save As →***

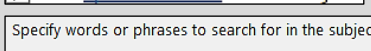


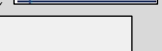
Tip: ***Save it in the folder: C:\Users\(username)\AppData\Roaming\Microsoft\Templates)***

The following will define a **Rule** for **Automatic Reply** to the incoming **Email**:

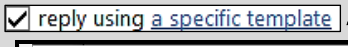
5. ***File Tab →Manage Rules and Alerts →*** ***New Rule →***



6. 

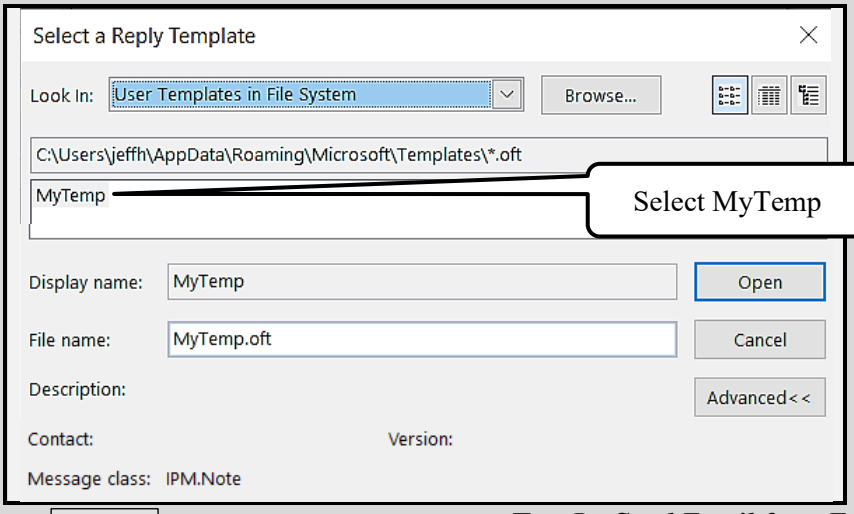
→ Click 

in the lower section →

7. 

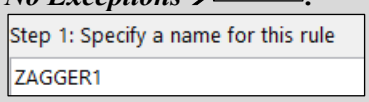
→Click 

in the lower section →



→ Open → Next >.

8. ***No Exceptions →*** Next >.



9. → Finish

.

Test It: ***Send Email from Email account A to Email account B → Subject: ZAGGER1 →Send (you should see the template in account A).***

Practice Exercise 137 *Flag Message*	**Flag** a **Message** from a specific sender for follow-up or action: 1. ***File Tab →Manage Rules and Alerts →New Rule →*** Apply rule on messages I receive → Next >. 2. from people or public group → ***Click*** people or public group ***in the lower section →From: jeffhutch@elearnlogic.com →*** OK → Next >. 3. flag message for follow up at this time → ***Click*** follow up at this time ***in the lower section →*** **For:** ***Today →*** OK → Next >. 4. ***No Exceptions →*** Next >. 5. Step 1: Specify a name for this rule: Flag → Finish. **Test It:** ***Send Email from jeffhutch@elearnlogic.com → Subject: Flag message →Send.***
Practice Exercise 138 *Important Message*	**Mark** a **Message** from a specific sender as **Important**. 1. ***File Tab →Manage Rules and Alerts →New Rule →*** Apply rule on messages I receive → Next >. 2. from people or public group → ***Click*** people or public group ***in the lower section →*** From: jeffhutch@elearnlogic.com → OK → Next >. 3. mark it as importance → ***Click*** importance ***in the lower section →*** **Specify the importance to set:** ***High →*** OK → Next >. 4. ***No Exceptions →*** Next >. 5. Step 1: Specify a name for this rule: Automatic Importance → Finish. **Test It:** ***Send an Email from jeffhutch@elearnlogic.com → Subject: Automatic Importance →Send.***
Practice Exercise 139 *Delete It*	**Delete** a message from a domain. This can be useful if you are receiving many messages from different people at the same company. 1. ***File Tab →Manage Rules and Alerts →New Rule →*** Apply rule on messages I receive → Next >. 2. with specific words in the message header →***Click*** specific words ***in the lower section →*** ***@russamarketing.com →*** Add → OK → Next >. 3. delete it → Next >. 4. ***No Exceptions →*** Next >. 5. Step 1: Specify a name for this rule: Delete JunkVendor → Finish. **Test It: You can only test this by changing the name "junk vendor" to an Email you have previously received.**
Practice Exercise 140 *Me Mail*	This will stop all **Rules** if an **Email** was sent directly to you: 1. ***File Tab →Manage Rules and Alerts →New Rule →*** Apply rule on messages I receive → Next >. 2. sent only to me → Next >. 3. stop processing more rules → Next >. 4. ***No Exceptions →*** Next >. 5. Step 1: Specify a name for this rule: Sent Only to Me → Finish.

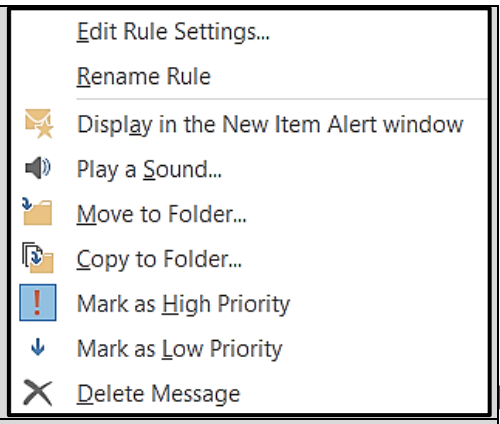
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A.8 Change Rule

Change Rule

This will add or **Change** an existing **Rule** to include one of the following options.

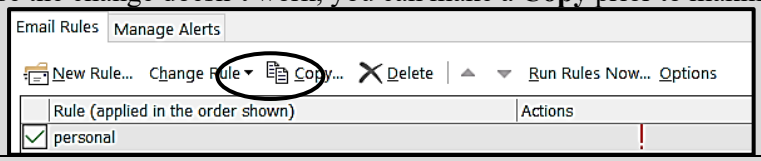
File Tab→Manage Rules and Alerts→Select desired Rule→Change Rule dropdown arrow→Choose an option.



A.9 Copy

Copy...

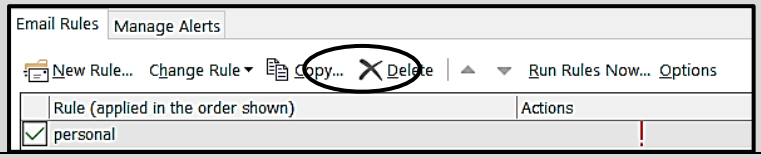
If you want to make changes to a **Rule** but also want to keep the origonal just in case the change doesn't work, you can make a **Copy** prior to making a change.



A.10 Delete

Delete

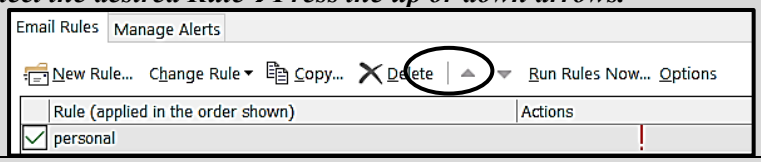
This will **Remove** the selected **Rule.**



A.11 Move Rule

The small arrows will allow you to change the order that **Rules** will process.

Select the desired Rule→Press the up or down arrows.

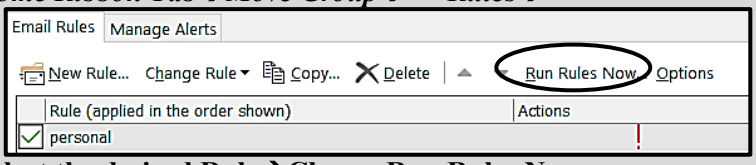


A.12 Run Rules Now

Run Rules Now...

Often times, a **Rule** is created after you receive **Email** to be filtered. In this case, however, you can **Run Rules** in your current mailbox to test the **Rule.**

Home Ribbon Tab→Move Group→ Rules→

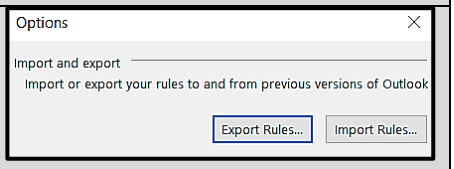


Select the desired Rule→Choose Run Rules Now.

A.13 Import/Export Rules

Options

If you are upgrading your system or moving to a different computer, you can **Export** the defined **Rules** and **Import** them to a different computer.



A.14 Move Action

Once a **Move Rule** moves a message to a folder, no other **Rules** will be processed on that message because it is physically unavailable in the **Inbox**. However, a copy **Rule** will continue processing other **Rules** because it is still physically in the **Inbox.**

A.15 Client-Side Rules	**Client Rules** will only run when **Outlook** is open. If you create a **Client-Side Rule** to notify recipients you are out of the office, **Outlook** must be open in order for it to run.
A.16 Junk Email	**Junk Email** vendors are constantly changing a sender's **Email** address which will bypass the block sender's list. As **Junk Mail** vendors get more sophisticated, we too must increase our knowledge of techniques to filter **Email**. The **Rules** feature is one technique you might want to consider.
A.17 Junk Mail Rules	**Junk Mail Rules** run before custom **Rules**. **Refer to Appendix E concerning how Junk Mail Rules are processed.**

Section 2: Exchange Features

A.18 Server Side Rule	**Server-side** rules are stored on an **Exchange Server** so the client application (local installed **Outlook**) does not need to be open in order to process a **Rule**. **Server-Side Rules** take priority over all **Client-Side Local Rules** regardless of the order of the **Rules** listed. One example of a **Server-Side Rule** is the **Out of Office Assistant.**

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Appendix B - Configure Email Options

This will allow you to connect **Outlook** to your **Internet** or **Exchange** accounts. All **Email** accounts can be available in **Outlook** to view, sort, and read. However, when new **Email** arrives on your internet or **Exchange** accounts, it will be downloaded automatically if you are using a POP protocol. In this chapter, we will show you how to set up **POP** and **IMAP** connections to your Internet and **Exchange** accounts.

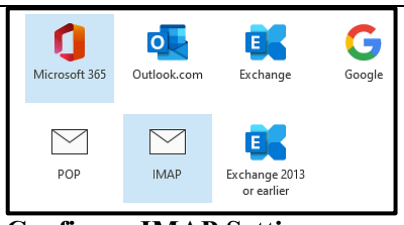
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[Section 2 - Exchange Features](#)

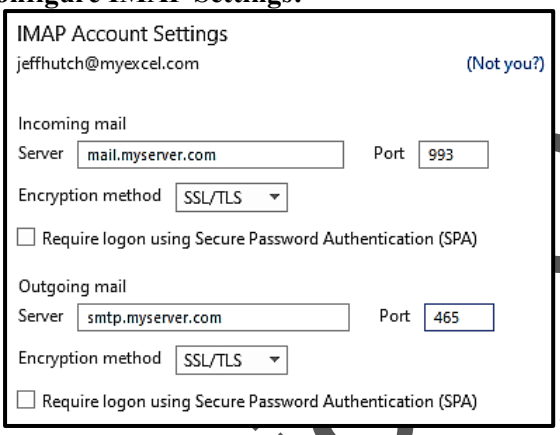
Section 1: Setup POP and IMAP Accounts

Concept	Explanation / *Command string in italic.*
Practice Exercise 141 *Google Accounts*	Create a **Google** account at https://account.google.com to use with this material. If you are using this material in conjunction with our **Remote Online** classes, the instructor will also assign a **Gmail** account.
B.1 Outlook Data Files	When you create a **POP** or **IMAP Email** account, it will create an **Outlook Data File(.pst),** sometimes referred to as a **Personal Folders File (pst). IMAP** will automatically create a new **Outlook** data file. **POP** also has the option of creating a new **Outlook Data File** or adding **Email** to an existing **Outlook** data file. This means you can have two **POP** accounts going to the same inbox within **Outlook**.
B.2 Outlook Data File Location	When you configure **Email**, the **Outlook Data File** can be created on a local hard disk. In **Windows 10**, the **Outlook** data files are located in **C:\Users\(username)\AppData\Local\Microsoft\Outlook** or **C:\Users\(username)\Documents\Outlook Files.** One technique is to have each POP account have separate data files to store the Email. Another technique is to have each POP account share the same data file. In other words, you would have one large data file.
B.3 IMAP Account	All **Email** from the internet server will be downloaded to an **Outlook IMAP** account. Any **Email** that is deleted from the **Outlook** account will be deleted from the internet server account. This is because the accounts are in sync. If your **Outlook** account is removed, all **Emails** will remain on the internet account. If you add **Outlook** on a new computer and configure **IMAP**, all **Email** will be restored from the internet account. One common problem is, however, you need to be connected to the internet in order to use the account because some public **WiFi** networks block **IMAP** accounts.
Practice Exercise 142 *IMAP* *Outlook 365*	1. ***Open Outlook → File Tab → Info →***  ***Account Settings →*** ***Account Settings → Email Tab →***  ***New Button:*** 2.  3. **Choose Email protocol:**

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Partial Sample Book



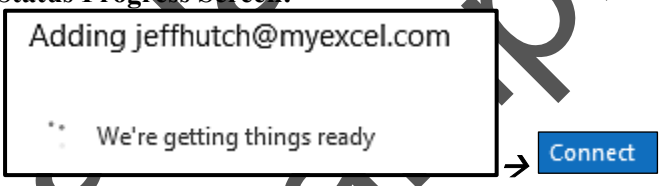
4. **Configure IMAP Settings:**



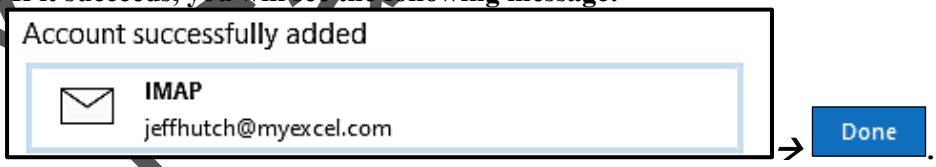
5. **Set Password:**



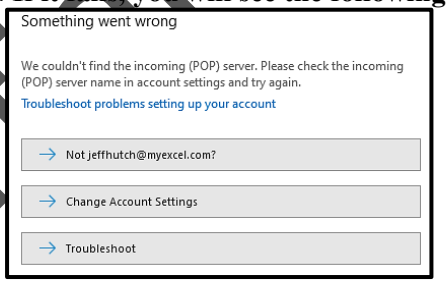
6. **Status Progress Screen:**



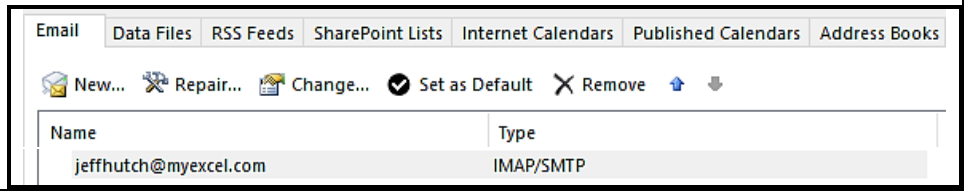
7a. **If it succeeds, you will see the following message:**



7b. **If it fails, you will see the following message:**



8. **Final Result:**



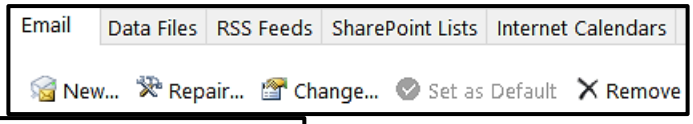
For Evaluation Only
Participant Example Book

Practice Exercise 143 *IMAP* *Outlook 2010*	1. ***Open Outlook →File Tab →Info →Account Settings →Account Settings →Email Tab →New Button →*** ◉ ***Email Account →*** Next > **.** 2. **Your Name:** ***Student1 →Email Address: studentab1@gmail.com →Password: myoutlook →*** Next > . 3. ***(autoconfigure) →*** Finish **.** **Test It:** Test the account settings and delete account*:* ***File Tab →Info →Account Settings →Account Settings →Email Tab →(Select Student Account) → Remove Button →Yes.***
Practice Exercise 144 *IMAP Manual configuration* *Outlook 2010*	1. ***Open Outlook →File Tab →Info →Account Settings →Account Settings → Email Tab →New Button →*** ◉ ***Email Account →*** Next > . 2. ◉ ***Manually configure server settings →*** Next > ***→*** ◉ ***Internet Email →*** Next > . 3. **Internet Email Settings - Your Name:** ***student1 →Email Address → studentab1@gmail.com →Account Type: IMAP →Incoming mail server: imap.gmail.com →*** **Outgoing mail server:** ***smtp.gmail.com →*** **Username:** ***studentab1 →*** **Password:** ***myoutlook →More settings.*** 4. **General Tab - Mail Account:** ***studentab1@gmail.com →*** **Reply Email:** ***studentab1@gmail.com.*** 5. **Outgoing Server Tab -** ☑ ***My outgoing server (SMTP) requires authentication →*** ◉ ***Use same settings as my incoming mail server.*** 6. **Advanced Tab - Incoming server (IMAP):** ***993 →Use the following type of encrypted connection: SSL →*** **Outgoing server (SMTP):** ***25 → Use the following type of encrypted connection: TLS →*** OK ***→*** Next > ***→Close →*** Finish **.** **Test It:** Test the account settings and delete account*:* ***File Tab →Info →Account Settings → Account Settings → Email Tab → (Select Student Account) →Remove Button →Yes.***
B.4 POP Account	When you add a **POP** protocol to **Outlook**, all **Email** from the internet account will be downloaded and placed in the **Inbox**. As new **Email** is delivered to the internet account, it is downloaded automatically. If you add multiple **POP** accounts, they can use a separate **Outlook Data File** for storage or both accounts can use the same **.PST** storage location. You will need to contact each internet provider to determine any special instructions needed and specifically identify the internet ports (25/110) used, but oftentimes the defaults work just fine.

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Partial Sample Book

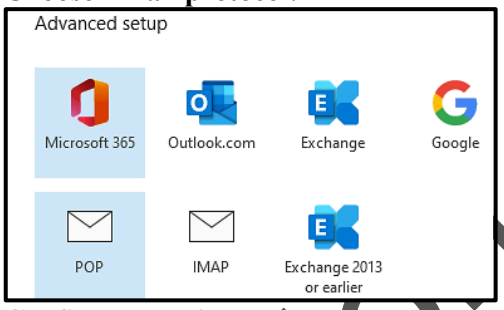
Practice Exercise 145
POP Account
Outlook 2020

1. ***Open Outlook → File Tab → Info → Account Settings → Account Settings → Email Tab → New Button:***

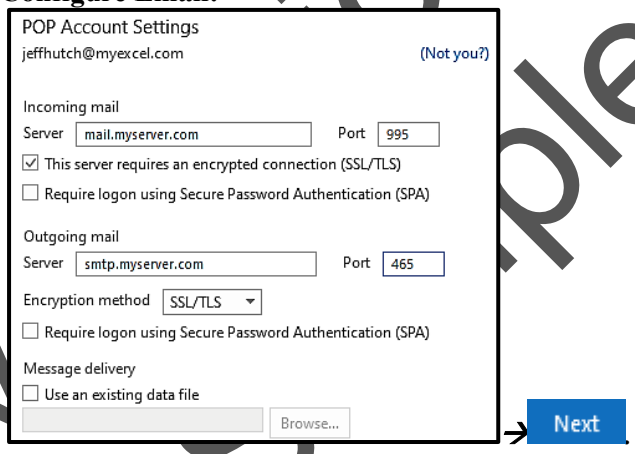


2. 

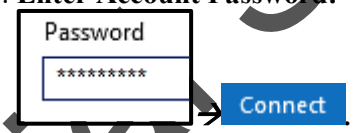
3. **Choose Email protocol:**



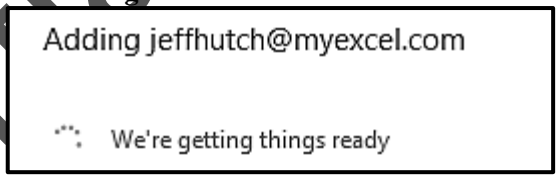
4. **Configure Email:**



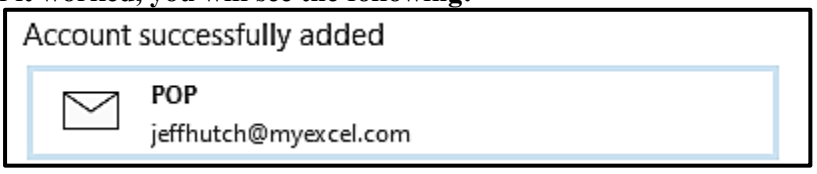
5. **Enter Account Password:**



6. **Status Page:**

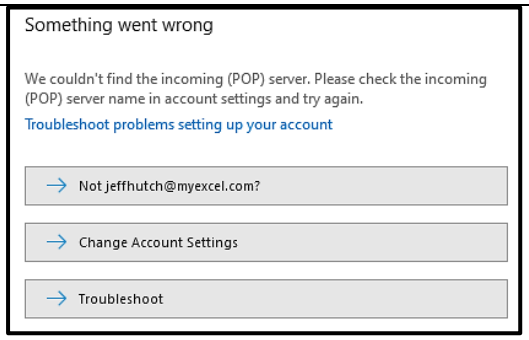


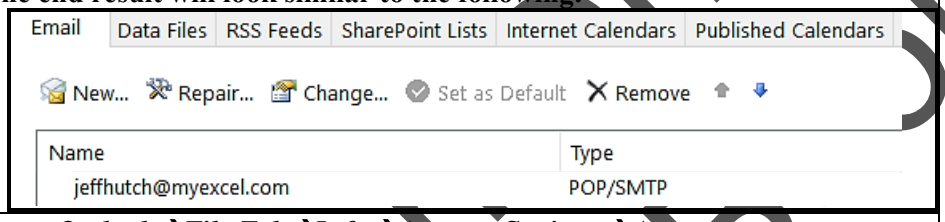
7a. **If it worked, you will see the following:**



7b. **If it failed, you will see the following message:**

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<table>
<tr><td></td><td>

8. The end result will look similar to the following:

</td></tr>
<tr><td>Practice Exercise 146
POP Account
Outlook 2010</td><td>1. Open Outlook → File Tab → Info → Account Settings → Account Settings → Email Tab → New Button → ◉ Email Account → Next > .
2. ◉ Manually configure server settings → Next > .
3. ◉ Internet Email → Next > .
4. Internet Email Settings - Your Name: student1 → Email Address → studentab1@gmail.com → Account Type: POP3 → Incoming mail server: pop.gmail.com → Outgoing mail server: smtp.gmail.com → Username: studentab1 → Password: myoutlook → ◉ New Outlook Data File (Tip: if you choose Existing you can use the same Data File for 2 POP accounts) → More settings.
5. General Tab - Mail Account: studentab1@gmail.com →
Reply Email: studentab1@gmail.com.
6. Outgoing Server Tab - ☑ My outgoing server (SMTP) requires authentication → ◉ Use same settings as my incoming mail server.
7. Advanced Tab - Incoming server (POP3): 995 → ☑ Use the following type of encrypted connection (SSL) → Outgoing server (SMTP): 25 → Use the following type of encrypted connection: TLS →
Leave a copy of messages on the server → ☐ Remove from server after 14 days → OK → Next > → Close → Finish .
Test It: Test the account settings and delete account.
File Tab → Info → Account Settings → Account Settings → Email Tab → (Select Student Account) → Remove Button → Yes.
Tip: Other possible ports to try 110/465.</td></tr>
<tr><td>B.5 SSL
Encryption</td><td>Secure Sockets Layer (SSL) is an Encryption protocol designed to provide communication security over the Internet. If the internet provider uses SSL, you must add it to the configuration of the Email.</td></tr>
<tr><td>B.6 TLS
Encryption</td><td>Transport Layer Security (TLS) is an Encryption protocol designed to provide communication security over the Internet. If the internet provider uses TLS, you must add it to the configuration of the Email. See Advanced Tab in POP Account exercise above.</td></tr>
</table>

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Partial Sample Book

B.7 RSS Feeds In Outlook	This is a built-in feature that pulls information from news and blog sites: **In a Web Browser:** ***Go to the website: www.Freerssfeed.org →*** ***Click on the***  ***Icon → Copy the link: select link →*** **Ctrl** **C** ***keys →*** **In Outlook:** ***Right-click on the RSS folder in Outlook →Add a new RSS feed → Paste the RSS Link: Click in the box:*** **Ctrl** **V** ***keys →*** Add ***→*** **Test It:** To test the **RSS feed**: ***Go to the RSS folder to see the RSS Feed.***
B.8 Search Locations	One aspect of creating multiple accounts is assuming all **Email** accounts are set up to be **Searched** if all locations are chosen. ***Home Ribbon Tab →Filter Email → More Filters →On the Search Contextual Ribbon →Search Tools → Locations to Search →Make sure the accounts are checked.***

Section 2: Exchange Features

B.9 Exchange Server Configuration	Only one **Exchange Server Configuration** can be added per **Outlook** installation. However, multiple **POP** and **IMAP** accounts can be added to **Outlook**.
B.10 Work Offline	There is a feature to **Work Offline** and when configured, it stores **Email** on the local **Outlook Data File (.ost).**
B.11 Exchange Setup	This can be customized depending on the implementation and setup of an **Exchange Server**.

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Partial Sample

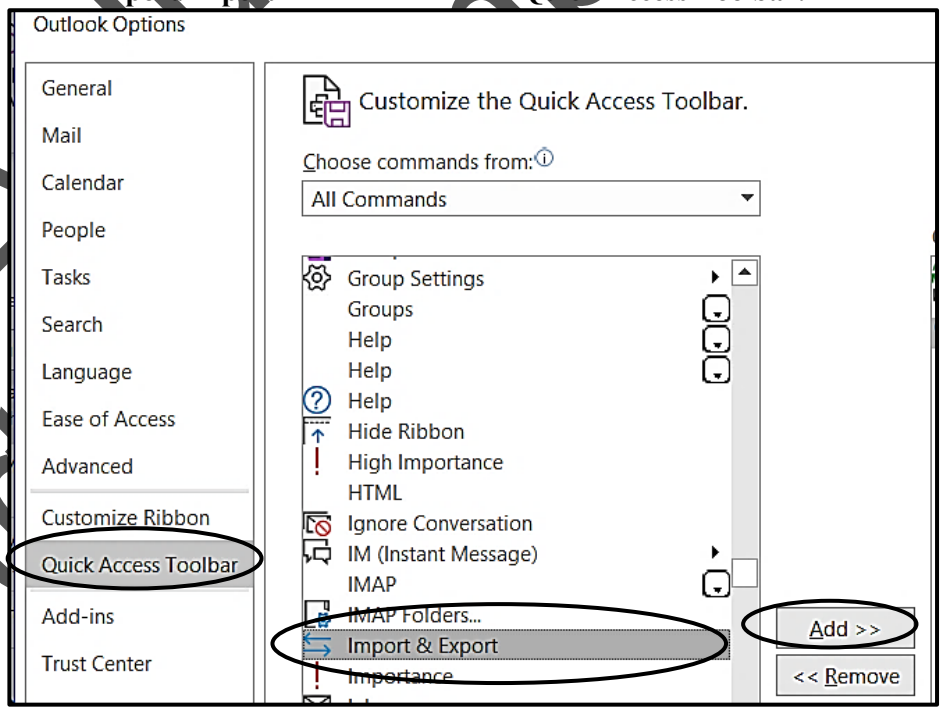
Appendix C - Import /Export

Over time, **Outlook** items will begin to accumulate. To keep your **Mailbox** from becoming too large and cluttered, you can either delete items or **Archive** them. **Archiving** removes items from their original folders and places them in corresponding folders in a file called **ARCHIVE.PST**. You may need to clean out your **Email** folders and save them to a backup file for future recall. The **Import/Export** feature can use the same file structure **(.pst),** but the **Import/Export** feature has to be executed manually.

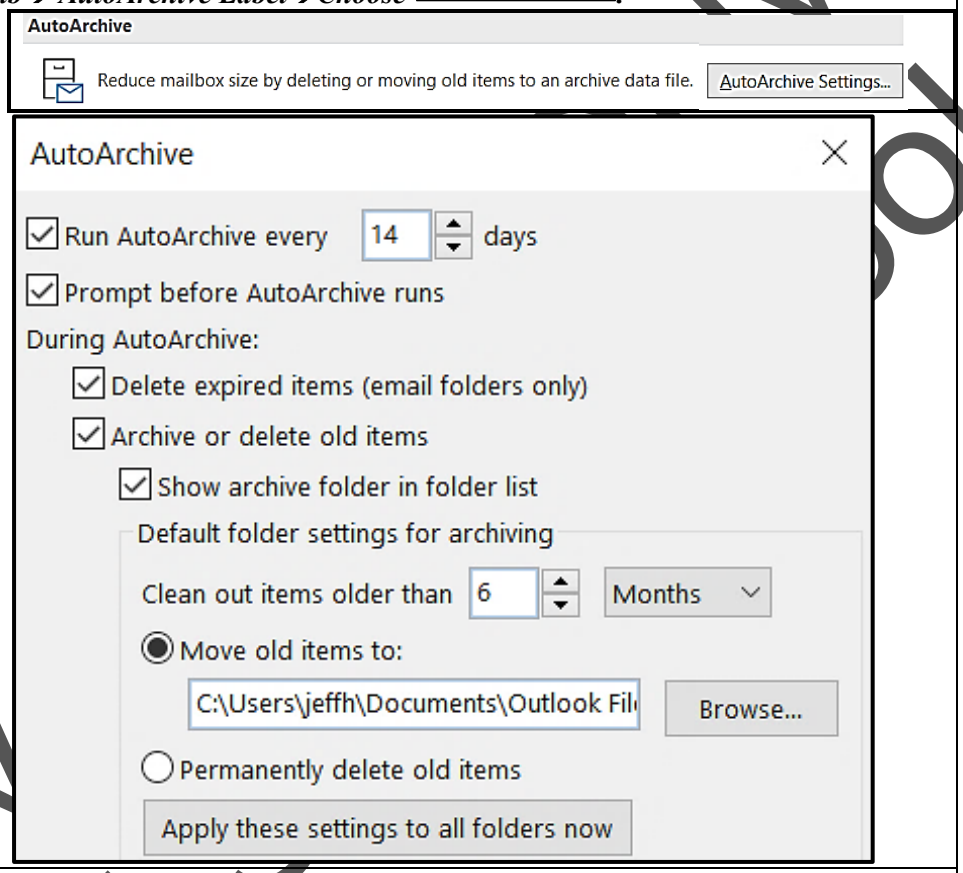
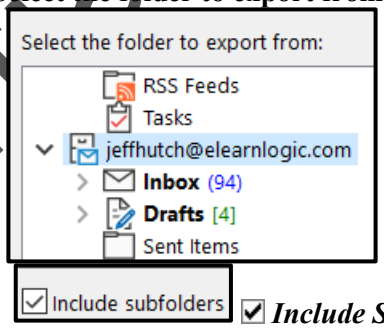
Chapter Table Of Contents

[Section 1 - Core Concepts]
[Section 2 - Exchange Features]

Section 1: Core Concepts

Concept	Explanation / *Command string in italic.*
C.1 Quick Access Toolbar	This is located on the top left of the **Outlook** interface.  It is used to provide easy access to commonly used commands: ***File Tab → Options → Quick Access Toolbar →(Choose Command)*** → Add >> → OK.
Practice Exercise 147 Import/Export	1. ***File Tab → Options → Quick Access Toolbar →***  . 2. ***Select the***  ***command →*** Add >> → OK. The **Import/Export** will be added to the **Quick Access Toolbar:** 

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C.2 AutoArchive Setup	**AutoArchive** is a tool that pulls Email and stores them based on parameters chosen. Default parameters will pull Email and store it in an Archive file. The problem is most users don't know how to restore Email that has disappeared. **Tip**: **To restore an Archived file:** ***File Tab→Open & Export→Open Outlook Data File***
Practice Exercise 148 AutoArchive	**Outlook,** by default, automatically runs every 14 days and archives items older than 6 months. To configure **AutoArchive**: ***File Tab→Options→ Advanced Tab→ AutoArchive Label→Choose*** AutoArchive Settings... . 
C.3 Export	1. ***File Tab→Options→Advanced Tab→Export Label→Export Button→*** 2. **Choose an action to perform:** ***Export to a file→*** Next > ***→*** 3. **Create a file of type:** ***Outlook Data File(*.pst)→*** Next > ***→*** 4. **Select the folder to export from:** ***(Choose the top-level folder)***  ***Include Subfolders→*** Next > ***→*** 5. **Save exported files as:** ***C:\Data\Outlook365-1\Backup2-2-2020→*** ***Replace duplicates with items exported→*** Next > ***→*** 6. Finish ***→*****Password:** ***No (It is not necessary to specify a password).***

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C.4 View Exported Data

This will connect to the data file and display it in your folder list:

1. ***File Tab → Open & Export →***
   Open Outlook Data File →
   (Choose the Data file) → OK ***Button.***
2. ***(The Opened Data File will be displayed in the folder list on the left side of the interface).***
3. ***Expand the file by clicking*** > ***→Drag n Drop the desired files to the active folders.***



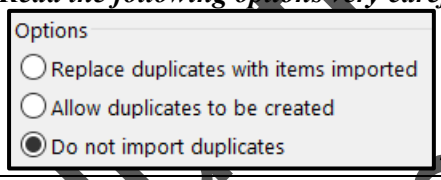
Tip: If you copy the files, they will remain in the **Backup Outlook Data File**.

Tip: In **Outlook 2010** use**:** ***File Tab →Open →*** ***Open Outlook Data File.***

C.5 Import

There is no need to **Import** unless you want to bring items in permanently and replace Active folders with a backup file. The method above is the best approach because you can selectively choose items desired.

1. ***File Tab →Options →Advanced →Export Label →Export Button →***
2. **Choose an action to perform:**
   Import from another program or file → Next > **→**
3. **Select file type to import from:** ***Outlook Data File(*.pst) →*** Next > **→**
4. **File to Import:** ***(Choose the file to import).***
5. ***Read the following options very carefully so you won't lose valuable items.***

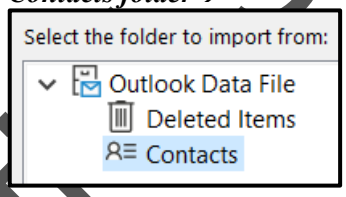


→ Next > → Finish.

C.6 Import Contact

Open the **Contacts** folder and display the **Address Cards** view, if necessary.

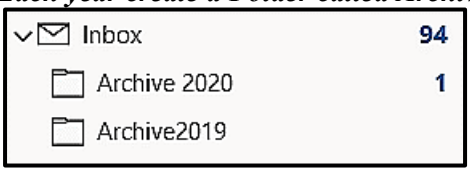
1. ***File Tab →Open&Export →*** ***Import/Export →***
   Import from another program or file → Next >.
2. Outlook Data File (.pst) → Next >.
3. Browse... → ***C:\Data\Outlook365-1 →Contacts.pst →*** Open → Next >.
4. ***Contacts folder →***



→ Finish.

Tip: In **Outlook 2013***: File Ribbon Tab →Open & Export →Import/Export.*

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Partial Sample Book

C.7 Alternative Backup Technique	Store all previous year's **Email** in a separate folder. Then, use the export features to export each folder to a specific location. 1. ***Each year create a Folder called Archive2020:***  At the beginning of 2020, export **Archive 2019** to a file called **Archive2019.pst**: 2. ***File Tab →Options →Advanced Tab →Export Label →Export Button →*** 3. **Choose an action to perform:** ***Export to a file →*** Next > ***→*** 4. **Create a file of type:** ***Outlook Data File(*.pst) →*** Next > ***→*** 5. **Select a folder to export from:** ***Archive2019*** 6. **Save exported files as:** ***C:\Data\Outlook365-1\Archive2019 →*** ◉ ***Replace duplicates with items exported →*** Next > ***→*** 7. Finish ***→*****Password:** ***No (It is not necessary to specify a password).***

Section 2: Exchange Features

C.8 Outlook Data File	Often, **Exchange** puts disk storage limitations on the number of items stored in **Outlook**. You can create an **Outlook Data File** to store them on the local C: drive: 1. **Create a blank folder:** ***Right-click on the Inbox (located in the left Navigation Pane) →*** 🗀 ***New Folder →*** **Name:** ***Backup.*** 2. **Create Outlook data File:** ***File Tab →Options →Advanced Tab → Export Label →Export Button →Choose an action to perform: Export to a file →*** Next > ***→*****Create a file of type:** ***Outlook Data File(*.pst) →*** Next > ***→*** 3. ***Select a folder to export from: Choose Backup →*** **Save exported files to:** ***C:\Data\Outlook365-1\Backup.pst →*** 4. Finish ***→No (do not specify a password).*** 5. **Add Outlook Data File:** ***File Tab →Open →Open Outlook Data File → C:\Data\Outlook365-1\Backup.pst →*** Open ***.*** 6. **Drag n Drop an Email to the new Outlook Data File -** Once you create a **Personal Data File (.pst)** using **Archive** or **Export,** you can attach the file **(.pst)** as a separate mailbox.
C.9 AutoArchive On Exchange	Often, **Exchange** servers impose storage limitations on the amount of **Email** stored. You can create a **Data File** located on the C: or stored folder to store **Email** permanently as well as for long-term storage.
C.10 Size Limits	Often, **Exchange** administrators will limit the storage size of **Outlook** information. If you are always facing limitations, you can use the **Archive** feature to remove **Outlook Data.**

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Appendix D - Mail Merge

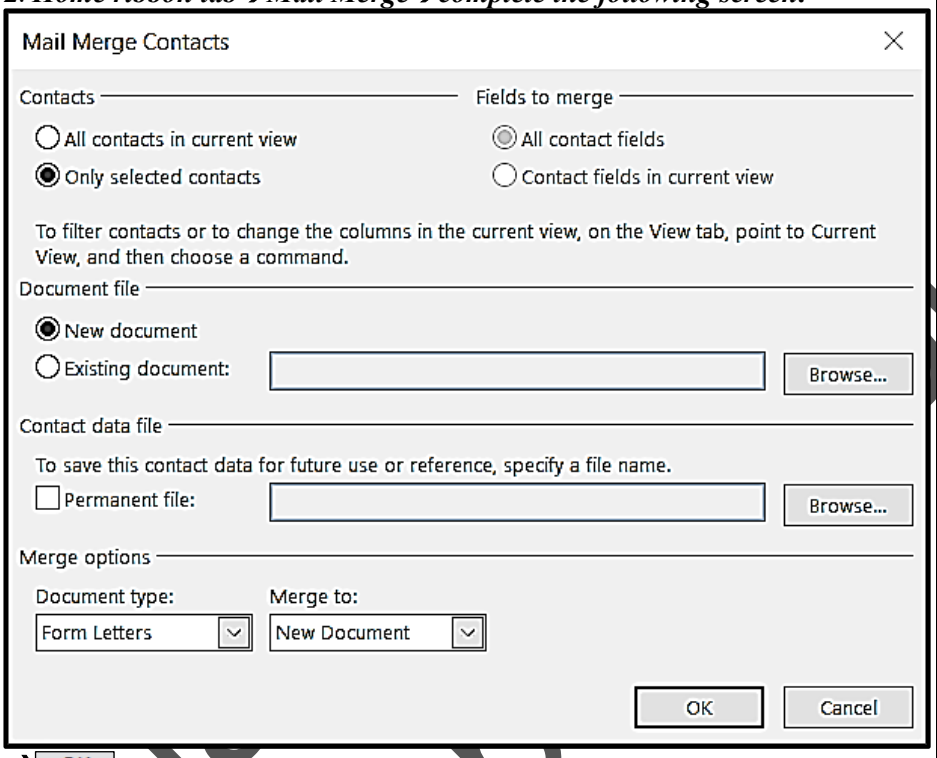
This is a way to merge a database (**Outlook, Excel, or Access**) with a document in order to create multiple **Email**s with the names in the body of the massage. Here, we will focus on merging an **Email** message with a list of **Email** addresses. This can be used to send **Emails** directly from you (with no other **Email** address) to your customers on a mass scale.

D.1 Word Mail Merge	When you send **Emails** to multiple people on the **CC** line, an **Email** may be perceived as non-important. Also, when you **BCC** multiple people, the recipient may not see their name in the "**To**" line and consider it non-important. The best approach is to send **Emails** directly to a recipient. However, doing this manually can take forever. That's where **Word Mail Merge** comes in. You can send a common message directly to multiple people, one at a time, with a single command.
Student Project C1 Create A Beta List	**First, create a Beta contacts folder to test this feature.** 1. ***Click on the Peoples Pane (located in the lower-left corner)→ Right-click on the Contacts folder (located in the left Navigation Pane) →*** ***New Folder→Rename to: Beta Mail List.*** 2. ***Add several Email addresses in the Beta Mail List: Studentab1@gmail.com; Studentab1@gmail.com; Studentab1@gmail.com.***
Student Project C2 Create Message	Open the document in Microsoft Word to be sent out. **Create a message similar to the following which will be the body of the Email:** Dear XXX, ***This is a test only - Please disregard*** **Tip**: The reason why this is created before doing **Mail Merge** is to keep a folder of previous messages sent for reference.
Student Project C3 Mail Merge	**Start Mail Merge:** ***Mailing Ribbon →Start Mail Merge →*** ***Step by Step Mail Merge Wizard →*** **Mail Merge Step 1 of 6:** ***Email messages →*** Next >. **Mail Merge Step 2 of 6:** ***Use the current document →*** Next >. **Mail Merge Step 3 of 6**: ***Select from Outlook contacts (or Use an existing list if the mail list is stored in Excel) →Choose People Pane → Choose the "Beta Mail List" folder →*** OK → OK → Next >. **Mail Merge Step 4 of 6:** ***Select XXX →More →First →Insert →Close →*** Next >. **Mail Merge Step 5 of 6: →** Next >. **This is used to see if the Email looks the way you want.** **Mail Merge Step 6 of 6:** ***Choose the "Electronic Mail" button →Subject line: (type in the subject) →*** ☑ ***All →*** OK.

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Partial Sample Book

D.2 Mail Merge

1.  ***People pane → Select several contacts using*** **Shift** ***or*** **Ctrl** ***keys.***
2. ***Home ribbon tab → Mail Merge → complete the following screen:***



→ OK

2. **In Word:** ***Choose Edit Recipient to see what was chosen →*** OK.
3. ***Type the Email message in Word.***
4. ***Finish and Merge → Send Email Messages → Subject: Test →*** OK.

For Evaluation Only
Partial Sample

Appendix E - Email Broadcast

If you want to broadcast **Emails** to your customers, there are some rules you must follow to prevent them from going to the Junk Mail filter. We will also discuss picking the best times to send **Emails**. An **Email** should be carefully constructed and approved by multiple staff.

E.1 Junk Mail Folder	The newer versions of **Outlook** use sophisticated routings that look for a combination of keywords. If found, they will categorize the **Email** as junk. It will require several flags (categories found) to consider it to be **Junk Mail.** We will present several of these examples in the following information, but it is best to avoid them altogether.
E.2 Junk Content Filters	**Junk mail** filters work by looking for keywords. The following are phrases that **Microsoft Outlook** uses to identify **Junk Email** in the body or subject of an **Email**: advertisement, !, $, free, money back, cards accepted, removal instructions, extra income, be amazed, your income, subject to credit approval, earn xxxx per week, check or money order, print out and fax, call now, 000, !!, $, Dear friend, for free?, for free!, Guarantee, satisfaction, absolute, more info, visit, SPECIAL PROMOTION, one-time mail, $$, order today, order now!, money-back guarantee, 100% satisfied , or ///////////////.
E.3 Adult Content Filter	**Microsoft Outlook** also looks for keywords such as xxx, over 18, over 21, adults, adults only, be 18, 18+, adult web, must be 21, adult en, erotic, sex, xxx!, free, or adult.
E.4 Email Tone	These Rules will determine if a recipient takes an action based on the seriousness or integrity perceived. **Rule 1 -** Remain consistent and friendly. **Rule 2 -** Eliminate qualifiers such as: almost, probably, in my opinion, and "I" statements. **Rule 3 Inquire -** Your leading paragraph must contain questions and actions such as a time frame to expect a response. **Rule 4 Inform -** Use lists and short paragraphs. State why the information is important. **Rule 5 Persuade -** State the problem you are addressing, outline ideas clearly, and conclude with the benefits.
E.5 Formatting Guidelines	Recipients will react to your **Email** based on how it is formatted. **Rule 1 Uppercase/Lowercase -** Uppercase characters suggest shouting, all lowercase characters reduce credibility (the perception that you are not able to write properly). Therefore, using proper case characters is best. **Rule 2 Double Space -** Don't use it at all. **Rule 3 Jargon/Clichés -** When they cause confusion, it takes away from the original message. Example: "Open a can of worms." **Rule 4 Proper use of Font -** Special formatting and font adjustments used for emphasis might not get converted.
E.6 To And From Lines	**The To or From line should not contain:** friend@, public@, success@, sales@, mail@, or hello@. This is sometimes used in conjunction with a large **BCC** list. Example: friend@elearnlogic.com.
E.7 Safe Senders List	When you send a broadcast **Email**, you can request to add the **Email** to the **Safe Senders** list. Also, **Email** located in a recipient's contacts folder is considered a "safe list" **Email** which will prevent future blocks. Add the following test: To make sure you continue to receive **Email** from us -- please add-Jeffhutch@elearnlogic.com to your contacts, safe list, or contacts folder.

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E.8 Best Time To Send	**Rule 1 -** Tuesday and Wednesday between 9 am and 2 pm are the best times to send **Emails**. Thursday is the second best. **Rule 2 -** Friday and Monday are not preferred. However, some groups such as sales organizations may prefer your message these days because it may be a slower time or low workload. **Rule 3 -** Design **Emails** to be viewed in the **Preview Pane.** Fifty percent of your **Email** recipients will only look at what appears in the window screen and will not scroll further down the page. There are five inches or less in which to squeeze your best content or offer. **Rule 4 - Eight Second Rule.** The average **Email** recipient will spend no more than eight seconds reviewing **Email**. To test this feature, open an existing **Email** and close it in 8 seconds. Try to remember what you see.

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Appendix F - Zero Email System

The Zero **Email** system is action-based and is designed to process **Email** quickly so you won't have to continually reread it. If more time is needed for response, move the **Email** to the "Immediate Action" folder. Informational **Email** can be stored in the "Reread" folder for later, and all other mail will go to the "Archive" or "Delete" folders. People should not read email every 5 minutes, but at specific intervals during the day. Of course, the goal is to read, respond, and get it out of the way as quickly as possible. Time is limited and the attention to address big issues becomes gradually diminished if we are constantly reading and rereading **Email**s. Although there are many avenues of streaming information, including **Email**, everyone must develop their own system of processing it quickly in order to get important work done. Therefore, in this chapter, we will develop the Zero **Email** technique.

F.1 Outlook Folders	Only maintain a few folders and as you continue to process **Email**, they will fall into the appropriate location**.** **Inbox** **Immediate Action** **ReRead** **Archive** **Other**
F.2 Initial Email Process	Some **Emails** you receive can be responded to by typing 2 to 4 lines. This could be a meeting invitation, request for information, agreement response, someone sending you a friendly message, or any message requiring quick action. Other **Email** responses can be rather lengthy and you may need to drag the **Email** to **Contacts** or **Calendar** in order to schedule a time to process it. Then, you can move the **Email** to an **Archive** folder.
F.3 Immediate Actions Folder	If the **Email** requires a more thought out response or you need to do some research, place it in the "**Immediate Action**" folder and continue to process your **Email**. When you reach zero in the **Inbox**, you have met your goal and can start taking action on the "**Immediate Action**" folder **Email**.
F.4 ReRead Folder	This is informational **Email** that you can read when you have time. Nothing will be placed here that requires a response, only an optional response. It could be an ad that interests you, a CC'ed **Email**, or an offer from a vendor that you may want to consider.
F.5 Archive Folder	When you process your **Email**, it will be stored here. You can use search features to find the **Email** if needed at a future date. All your processed or read mail will be located here.
F.6 Other	You may create other folders to hold specific types of **Email**. These should be temporary and all **Email** should be moved to the **Archive** folder once you have accomplished your objectives.
F.7 Rules Wizard	Moving **Email** to the Archive folder is very straight forward. **Refer to Appendix A for more information.**
F.8 Subject Rule	You would create a **Rule** to look for a specific keyword in the **Subject**. You, then, add multiple keywords to the **Rule** to identify more **Emails**.
F.9 Body Rule	You would create a **Rule** to look for a specific keyword in the **Body**. You then add multiple keywords to the **Rule** to identify more **Emails**.
F.10 Body/ Subject Rule	You would create a **Rule** to look for a specific keyword in the **Subject** or **Body**. You, then, add multiple keywords to the **Rule** to identify more **Emails**.

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F.11 Email Address Rule	You would create a **Rule** to look for a specific **Email** address. You, then, add multiple **Email** addresses to the **Rule** to identify more **Email**.
F.12 Delete folder	Use the **Delete** folder to get rid of **Emails** you do not want.
F.13 Junk Mail Folder	An **Email** will be redirected to the **Junk Mail** folder when flagged as **Junk Mail**. You will need to look at this from time to time to make sure good **Email** has not been flagged as **Junk**.
F.14 Junk Mail Filter	Take advantage of third-party **Junk Mail** filter services. This is how it works: All internet **Email** is redirected to the filter service. Then, your **Email** is sent to your internet provider **Email** account. Talk to your internet provider to see if they support any specific vendor or if they provide filtering for an additional cost. This will drastically reduce your **Junk Mail.**
F.15 Categories	You can create a **Rule** or manually file **Email** into specific **Categories**. Make sure you modify your **Category** names to reflect the system used to process **Email**. Keep your **Categories** generic. For example, don't name a **Category** "ProjectA" because "ProjectA" may be completed in a short period of time.
F.16 Flagging	You can create a **Rule** or manually **Flag Email** desired.
F.17 Quicksteps	Create **Quicksteps** to help you process your **Email**. **Quicksteps** examples are: Move to Archive, Flag Important **Email**, etc. **See Chapter 3 Section 1 for more details.**
F.18 Schedule Time to Read	You can't process **Email** if you are checking your inbox every 5 minutes or on-demand. Set specific times to process **Email** and give yourself a time limit to process each **Email**. If you can't process it quickly, then move it to the **Immediate** folder. You must choose your **Email** processing intervals (such as every 1hr, 2hrs, 3 times a day, morning, noon, and afternoon, or twice a day).
F.19 Other Internet Accounts	These are lower priority Email accounts. You may choose a different time of the day or week to process other **Email** accounts such as: once per day. Depending on the level of an **Emails** importance.
F.20 Set Expectations	Our coworkers may expect us to read **Emails** more often. If this is the case, discuss **Email** information in a staff meeting and communicate with the team about a new way to be more efficient. You might be an inspiration to others who are bogged down with **Email**.
F.21 Other Means of Information	Keep in mind that **Email** is only one vehicle to communicate. Don't forget other means of communication such as phone, meetings, personal interaction, blogs, RSS feeds, Facebook, Twitter, and Instagram.
F.22 Building a System	Come up with a system to process your **Email**, write it down, and stick with it.
F.23 Industry Acceptance	This processing technique is becoming more accepted. For more information, you can search the internet for the keyword "Inbox Zero."
F.24 Folder Organization	Folders used to store **Email** in categories can get cluttered. Before you create folders, make sure the method used is logical so you will be able to process and retrieve stored messages quickly. Low priority **Email** should be stored for later reading and high priority **Email** must be processed immediately. If you don't have time to process high priority **Email**, you need to identify it in order to process it at a later time. After the **Email** is saved, you do not want to waste time hunting for **Email** later.
F.25 Folder Traditional	The traditional layout is to create folders for each major subject and file **Email** accordingly. Keep names somewhat general such as "Newsletters," and file all Newsletter related items together.

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F.26 Folder High Power	Create 3 folders: 1) **Action or Urgent** - Store in this folder things that need to be read immediately and require a response. 2) **Read** - **Email** that requires no action but information that you want to read. 3) **Archive** - When you are finished with the **Email** it is stored here. This is a technique designed for fast processing of **Email**. It can be processed immediately, replies can be sent, and then **Email**s can be saved in the Archive folder. Remember to allocate a specific amount of time for **Email** reading, with the goal to get through all **Emails** as quickly as possible.
F.27 Folder Backup	At the end of the year, you might copy all **Emails** to a backup folder and **Archive**. This will prevent your **Inbox** from getting too big.

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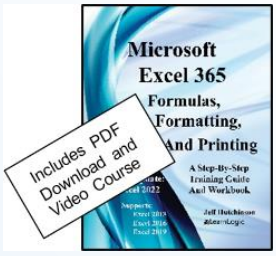
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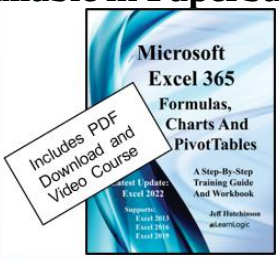
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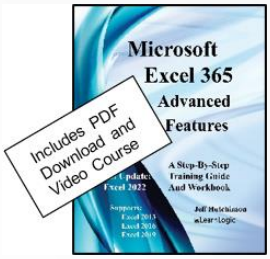
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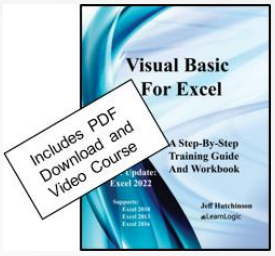
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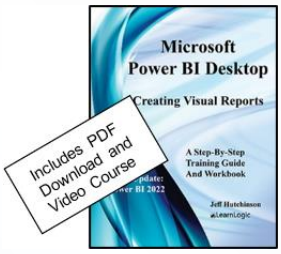
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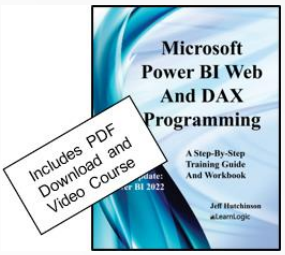
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Jeff Hutchinson is a corporate computer trainer and consultant. He teaches **Microsoft** and **Adobe** products from beginning to advanced topics. Jeff has a BS degree from BYU in Computer-Aided Engineering and owned a computer training and consulting firm in San Francisco, California for several years. He currently works as an independent computer instructor and these training guides are based on topics most commonly taught.

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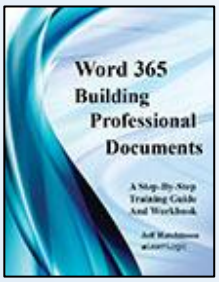


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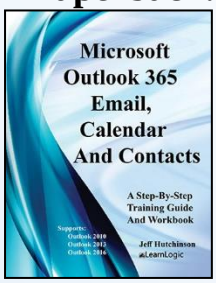


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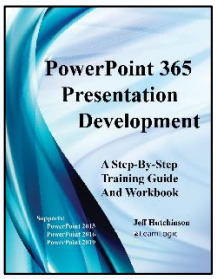
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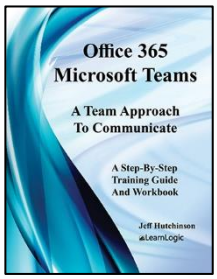
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