



microsoft® office outlook®

A Professional Approach

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Approved Courseware

What Does This Logo Mean?

It means this courseware has been approved by the Microsoft® Office Certification Program to be among the finest available for learning *Microsoft® Office Outlook® 2007*. It also means that if you complete and fully understand this courseware, you will be prepared to take an exam certifying your proficiency in this application.

What Is a Microsoft Office Specialist?

A Microsoft Office Specialist is an individual who has passed exams that certify his or her skills in one or more of the Microsoft Office desktop applications such as Microsoft Word, Microsoft Excel, Microsoft PowerPoint, Microsoft Outlook, or Microsoft Access. The Microsoft Office Specialist Program is the only program in the world approved by Microsoft for testing proficiency in Microsoft Office desktop applications. This testing program can be a valuable asset in any job search or career advancement.

More Information

To learn more about becoming a Microsoft Office Specialist, visit www.microsoft.com/officespecialist. The availability of Microsoft Office certification exams varies by application, application version, and language. Visit the site listed above for exam availability.

preFace

Microsoft® Office Outlook® 2007: A Professional Approach is written to help you master Microsoft Outlook. The text takes you step-by-step through the Outlook features that you're likely to use in both your personal and business life.

Case Study

Learning about the features of Outlook is one thing, but applying what you learn is another. That's why a Case Study runs through the text. The Case Study offers the opportunity to learn Word in a realistic business context. Take the time to read the Case Study about AllWood Mills, Inc., a fictional business located in Dubuque, Iowa. All the application exercises for this course involve AllWood Mills.

Organization of the Text

The text includes three units. Each unit is divided into smaller lessons. There are six lessons, each self-contained, but building on previously learned procedures. This building block approach, together with the Case Study and the features listed next, enables you to maximize the learning process.

Features of the Text

- Objectives are listed for each lesson.
- Required skills for the Microsoft Certification Exam are listed for each lesson.
- The estimated time required to complete each lesson up to the Lesson Applications section is stated.
- Within a lesson, each heading corresponds to an objective.
- Easy-to-follow exercises emphasize "learning by doing."
- Key terms are italicized and defined as they are encountered.
- Extensive graphics display screen contents.
- Toolbar buttons and keyboard keys are shown in the text when used.
- Large toolbar buttons in the margins provide easy-to-see references.
- Lessons contain important Notes, useful Tips, and helpful Reviews.
- A Lesson Summary reviews the important concepts taught in the lesson.
- A Command Summary lists the commands taught in the lesson.
- Concepts Review includes true/false, short answer, and critical thinking questions that focus on lesson content.
- Skills Review provides skill reinforcement for each lesson.
- Lesson Applications ask you to apply your skills in a more challenging way.
- On Your Own exercises let you apply your skills creatively.
- Unit Applications give you the opportunity to use the skills you learn throughout a unit.
- Includes an Appendix of Microsoft's Certification standards, a Glossary, and an Index.

Microsoft Office Certification Program

The Microsoft Office certification program offers certification for each application, and an overall “Office Specialist” option once enough exams have been passed. This certification can be a valuable asset in any job search. For more information about this Microsoft program, go to www.microsoft.com/officespecialist. For a complete listing of the skills for the Outlook 2007 certification exam and a correlation to the lessons in the text, see Appendix: Microsoft Office Certification.

Professional Approach Web Site

Visit the Professional Approach Web site at www.mhhe.com/pas07 to access a wealth of additional materials.

Conventions Used in the Text

This text uses a number of conventions to help you learn the program and save your work.

- Text to be keyed appears either in **red** or as a separate figure.
- Filenames appear in **boldface**.
- Options that you choose from tabs and dialog boxes, but that are **not** illustrated buttons, appear in green; for example, “Choose **Print** from the Office menu.”
- You’re asked to save each document with your initials followed by the exercise name. For example, an exercise might end with this instruction: “Save the document as *[your initials]5-12.*” Documents are saved in folders for each lesson.

If You Are Unfamiliar with Windows

If you’re unfamiliar with Windows, review the “Windows Tutorial” available on the Professional Approach Web site at www.mhhe.com/pas07 before beginning Lesson 1. This tutorial provides a basic overview of Microsoft’s operating systems and shows you how to use the mouse. You might also want to review “File Management” to get more comfortable with files and folders.

Screen Differences

As you practice each concept, illustrations of the screens help you follow the instructions. Don’t worry if your screen is different from the illustration. These differences are due to variations in system and computer configurations.

installation requirements

You'll need Microsoft Office Outlook 2007 to work through this textbook. Outlook 2007 needs to be installed on the computer's hard drive or on a network. Use the following checklists to evaluate installation requirements.

Hardware

- Computer with 500MHz or higher processor and at least 256MB of RAM
- CD-ROM drive and other external media of your choice for saving files
- 1.5GB or more of hard disk space for a "Student" Office installation
- 1024 × 768 or higher-resolution video monitor
- Printer (laser or ink-jet recommended)
- Mouse
- Modem or other Internet connection

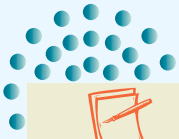
Software

- Outlook 2007 (from Microsoft Office Systems 2007)
- Windows XP with Service Pack 2 or later, or Windows Vista or later operating system
- Browser and Internet access

windows tutorial

If you are not familiar with Windows, review this “Windows Tutorial” carefully. You will learn how to

- Use a mouse.
- Start Windows.
- Use the taskbar, menus, Ribbon, dialog boxes, and other important aspects of Windows.



NOTE

All examples in this tutorial refer specifically to Windows Vista. If you are using any other version of Windows, your screen might differ slightly from the images shown in this tutorial. However, because most basic features are common to all versions of Windows, this tutorial should be helpful to you no matter which version of Windows you use.

If you are familiar with Windows but need help navigating Windows files and folders, refer to the section “File Management.” There you will find information on how Windows stores information and how to use Windows Explorer, a tool for managing files and folders.

Computers differ in the ways they can be set up. In most cases, when you turn on your computer, Windows loads automatically and the Windows log-on screen appears. When you see the Windows log-on screen, you need to log on and key a password. In order to log on, you need to know how to use the mouse, a device attached to your computer.

Using the Mouse

A *mouse* is a pointing device that is typically attached to your computer. Optical versions, which are not attached, are also available. The mouse is your access to the computer screen, allowing you to accomplish specific tasks. It operates through a pointer, a screen object you use to point to objects on the computer screen. The normal shape for the mouse cursor is an arrow. To move the pointer arrow on the screen, you roll the mouse on any flat object, or on a mouse pad, which has a smooth surface designed for easy mouse rolling. Although you can use the keyboard with Windows, you will probably find yourself using the mouse most of the time.

To use the mouse to point to an object on the computer screen:

1. Turn on the computer (if it is not on already). Windows loads, and the log-on screen appears. The screen includes a log-on name and picture assigned to you by your instructor.

To log on, you need to move the mouse pointer to the log-on name that was assigned. The pointer on the computer screen mirrors the actions made by the mouse when you roll it. Place your hand over the mouse and roll it to the left. The pointer on the screen moves to the left.

2. Roll the mouse to the right, and watch the pointer on the screen move to the right.
3. Practice rolling the mouse in all directions.
4. Roll your mouse to the edge of the pad, and then lift it up and place it back in the middle of the pad. Try it now to see how it works. When you feel that you can control the mouse position on the screen, roll the mouse to the name you have been assigned.

To log on, you will need to click the name to select it. Mouse clicks are covered in the next section; instructions for logging onto Windows Vista are covered in succeeding sections.

Clicks and Double-Clicks

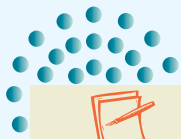
A mouse typically has two buttons at the front (the edge of the mouse where the cord attaches)—one on the left (primary) and one on the right (secondary). A mouse might also have a center button or a wheel.

Single-click actions with the mouse are used to position the pointer at a specific screen location. To perform a single click:

1. Roll the mouse around on the mouse pad until the pointer on the screen is over an object on the screen. Remember that the direction in which you move the mouse on the pad represents the pointer's movement on the screen.
2. Press and release the left mouse button once. Pressing and releasing the mouse button is referred to as a *click*. The computer tells you that the action has been performed when the object you click is *highlighted* (typically, the color of the selected object changes) to indicate to you that it has been *selected*. In Windows, you often need to select an object before you can perform an action. For example, you usually need to select an object before you can copy it.

Pressing and releasing the mouse button twice is referred to as a *double-click*. When you double-click an object on the screen, it is selected—the object is highlighted—and an action is performed. For example:

- When you double-click a folder, it is highlighted and opens to a window showing the items the folder contains.
- When you double-click a word in a text file, it is selected for a future action. In a text file, the pointer becomes an I-beam for selecting text in the document.



NOTE

Whenever you are told to “click” or “double-click” an object on the computer screen, use the left mouse button.

Selecting and Highlighting

You can also select a larger object such as a picture or a block of text by using the mouse.

1. Position the pointer on one side of the object, and hold down the left mouse button.
2. Roll the mouse until the pointer reaches the other side of the object.
3. Release the mouse button. The selected object is highlighted.

Drag and Drop—Moving an Object Using the Mouse

You can use the mouse to move an object on the screen to another screen location. In this operation, you select an object and drag the mouse to move the selected object, such as an icon. The operation is known as *drag and drop*.

1. Using the mouse, move the pointer over the object you want to drag.
2. Perform a single-click action by pressing the left mouse button but keep it pressed down. The selected object will be highlighted.
3. With the left mouse button still depressed, roll the mouse until the pointer and selected object are placed at the desired new location.
4. Release the mouse button to drop the object. The object is now positioned at the new location.

Using the Right Mouse Button

Pressing and quickly releasing the right mouse button is referred to as a *right-click*. Although the right mouse button is used less frequently, using it can be a real time-saver. When you right-click an icon, a *shortcut menu* appears with a list of commands. The list of commands displayed varies for each icon or object.

As you progress in this tutorial, you will become familiar with the terms in Table 1, describing the actions you can take with a mouse.

TABLE 1 Mouse Terms

TERM	DESCRIPTION
Point	Roll the mouse until the tip of the pointer is touching the desired object on the computer screen.
Click	Quickly press and release the left mouse button. Single-clicking selects objects.
Double-click	Quickly press and release the left mouse button twice. Double-clicking selects an object and performs an action such as opening a folder.
Drag	Point to an object on screen, hold down the left mouse button, and roll the mouse until the pointer is in position. Then release the mouse button (drag and drop).
Right-click	Quickly press and release the right mouse button. A shortcut menu appears.
Select	When working in Windows, you must first select an object in order to work with it. Many objects are selected with a single click. However, depending on the size and type of object to be selected, you may need to roll the mouse to include an entire area: Holding down the left mouse button, roll the mouse so that the pointer moves from one side of an object to another. Then release the mouse button.

Pointer Shapes

As you perform actions on screen using the mouse, the mouse pointer changes its shape, depending on where it is located and what operation you are performing. Table 2 shows the most common types of mouse pointers.

TABLE 2 Frequently Used Mouse Pointers

SHAPE	NAME	DESCRIPTION
	Pointer	Used to point to objects.
	I-Beam	Used in typing, inserting, and selecting text. When the I-beam is moved to a selected location, it turns into a blinking bar.
	Two-pointed arrow	Used to change the size of objects or windows.
	Four-pointed arrow	Used to move objects.
	Busy	Indicates the computer is processing a command. While the busy or working in background pointer is displayed, it is best to wait rather than try to continue working.
	Working in background	Note: Some of the working in background actions will not allow you to perform other procedures until processing is completed.
	Hand	Used to select a <i>link</i> in Windows' Help or other programs.

Starting Windows: The Log-on Screen

The Windows Vista log-on screen allows several people to use the same computer at different times. Each person is assigned a user account that determines which files and folders you can access and your personal preferences, such as your desktop background. Each person's files are hidden from the others using the computer. However, users may share selected files using the Public folder. The log-on screen lists each user allocated to the computer by name.

If the administrator has added your name to a given computer, the log-on screen will include your name. If the computers are not assigned to specific individuals, you may find a box for Guest or for a generic user. If your computer is on a network, your instructor might need to provide you with special start-up instructions.

After you have logged on to Windows Vista, the desktop is the first screen you will see. It is your on-screen work area. All the elements you need to start working with Windows appear on the desktop.

1. If you have not already turned on the computer, do so now to begin the Windows Vista loading process. The Windows log-on screen appears.



NOTE

On some computers, the log-on screen does not appear automatically. You might have to press the following keys, all at once, and then quickly release them:

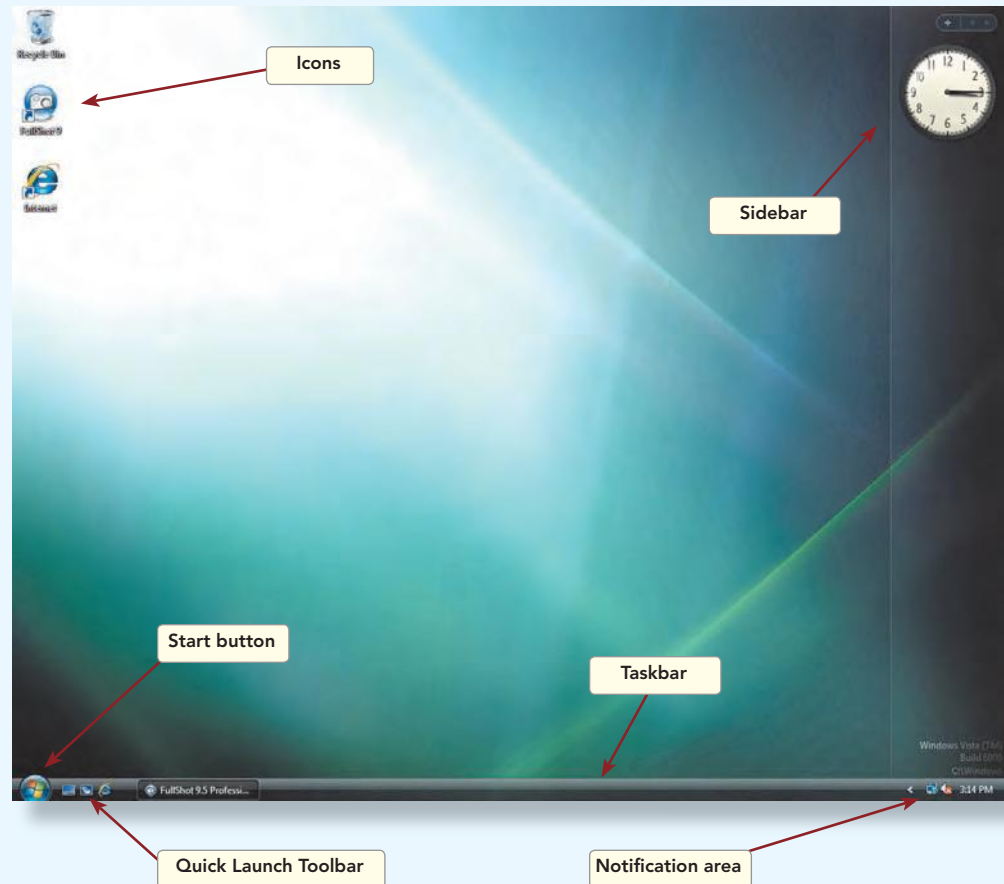
Ctrl + **Alt** + **Delete**.

2. Click your name to select it. The Password box appears with an I-beam in position ready for you to type your password.
3. Type your password.
4. Click the arrow icon to the right of the box. If you have entered the password correctly, the Windows desktop appears. If you made an error, the Password box returns for you to type the correct password.

The Windows Desktop

The Desktop includes the Start button, taskbar, and sidebar. You may also see icons on the desktop that represent folders, programs, or other objects. You can add and delete icons from the desktop as well as change the desktop background. The Start button is your entry into Vista functions.

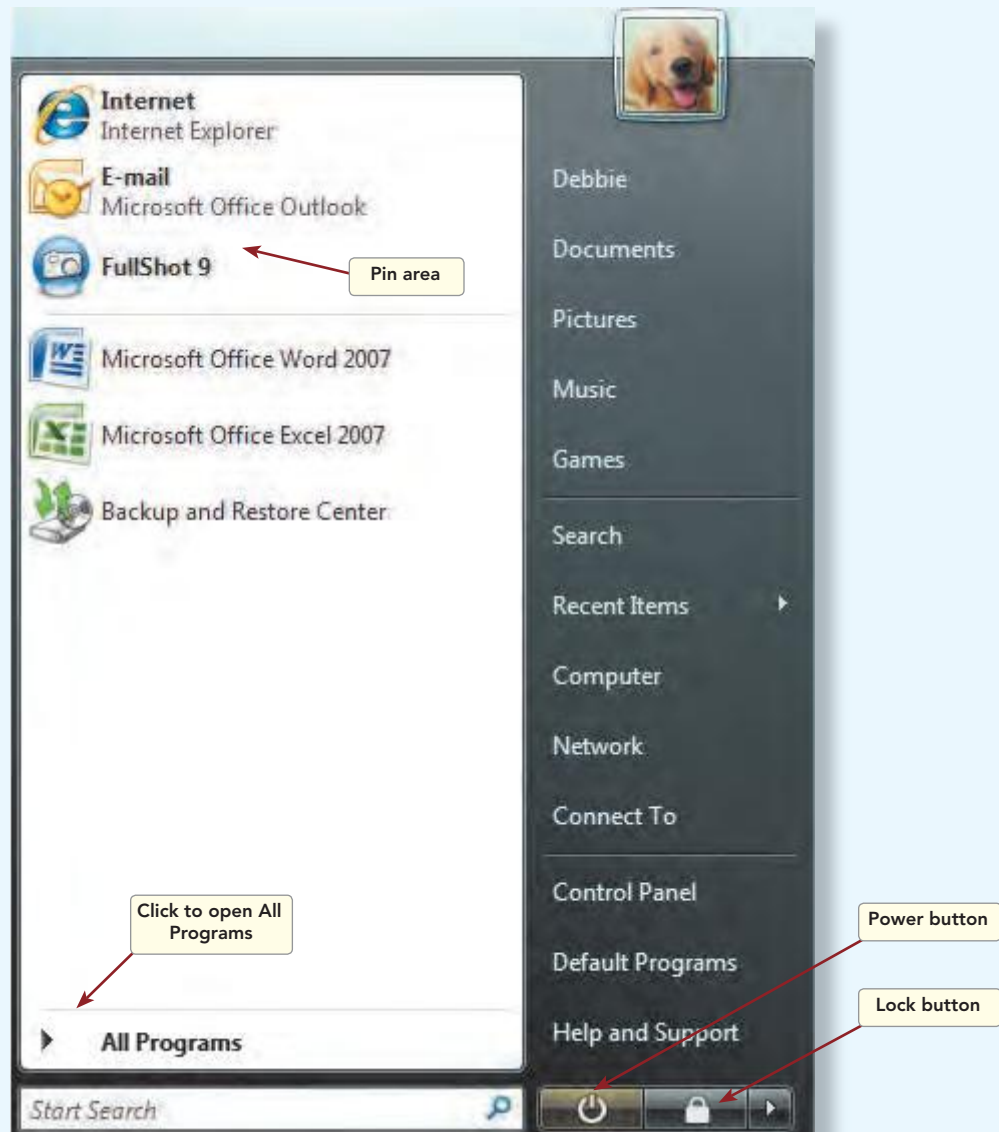
Figure 1
Windows Vista
Desktop



Using the Start Menu

Click the taskbar Start button to open the Start menu. You can also press the Windows logo key on the keyboard to open the Start menu. Use the Start menu to launch programs, adjust computer settings, search for files and folders, and turn off the computer. If this is a computer assigned to you for log-on, your Start menu may contain items that differ from those of another user assigned to the same computer. To open and learn about the Start menu, first click the Start button on the Windows taskbar. The Start menu appears.

Figure 2
Start menu



The left pane consists of three sections divided by separator lines. The top section, called the *pin area*, lists programs that are always available for you to click. These can include your Internet browser, e-mail program, your word processor, and so forth. You can remove programs you do not want listed, rearrange them, and add those you prefer.

Below the separator line are shortcuts to programs you use most often, placed there automatically by Windows. You can remove programs you do not want listed, rearrange them, but not add any manually.

All Programs displays a list of programs on your computer and is used to launch programs not listed on the Start menu.

Below the left pane is the *Search box* which is used to locate programs and files on your computer.

The right pane is also divided into three sections. It is used to select folders, files, and commands and to change settings. Use the icons at the bottom of the right pane to save your session, lock the computer, restart, switch users, and shut down.

Table 3 describes the typical components of the Start menu.

TABLE 3 Typical Components of the Start Menu

COMMAND	USE
Left Pane	
Pin area	Lists programs that are always available. You can add and delete items to the pin area.
Internet	Connects to the default browser.
E-mail	Connects to the chosen e-mail service.
Below the First Separator Line	
Programs	Lists programs that you use most often. You can add to and rearrange the programs listed.
Below the Second Separator Line	
All Programs	Click to display a list of programs in alphabetical order and a list of folders. Click to open a program.
Start Search	Use to search programs and folders. Key text and results appear.
Right Pane	
Personal folder	Opens the User folder.
Documents	Opens the Documents folder.
Pictures	Opens the Pictures folder.
Music	Opens the Music folder.
Games	Opens the Games folder.
Search	Opens the Search Results window. Advanced Search options are available.
Recent Items	Opens a list of the most recent documents you have opened and saved.
Computer	Opens a window where you can access disk drives and other hardware devices.
Network	Opens the Network window where you can access computers and other devices on your network.
Connect To	Opens a window where you can connect to a different network.
Control Panel	Opens the Control Panel.
Default Programs	Opens the Default Programs window where you can define default programs and settings.
Help and Support	Opens the Windows Help and Support window. Help offers instructions on how to perform tasks in the Windows environment.
Power button	Turns off the computer.
Lock button	Locks the computer, or click the arrow beside the Lock button to display a menu for switching users, logging off, restarting, or shutting down the computer.

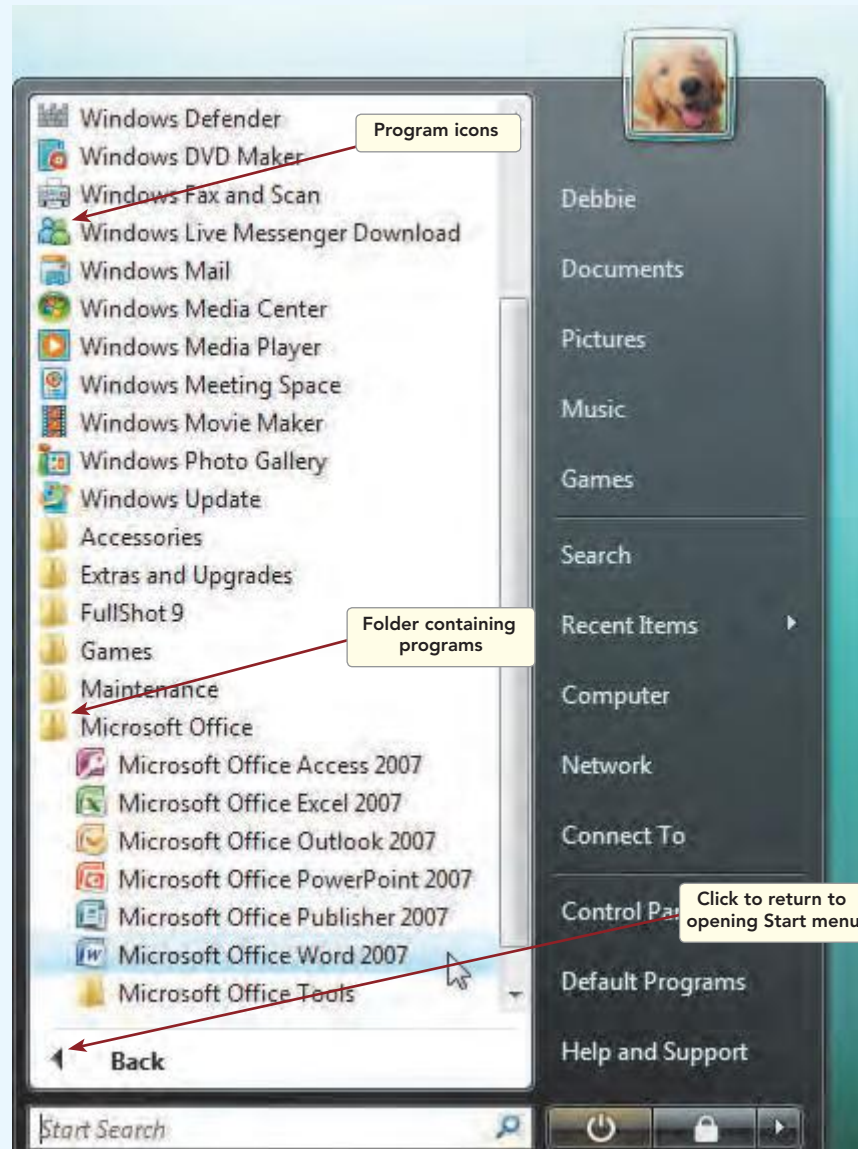
Using the All Programs Command

Most programs on your computer can be started from the All Programs command on the Start menu. This is the easiest way to open a program not listed directly on the Start menu.

1. To open the All Programs menu, click the Start button. The Start menu appears.

2. Click **All Programs** or the triangle to the left near the bottom of the left pane. The All Programs menu appears, listing the programs installed on your computer. Every computer has a different list of programs. Notice that some menu entries have an icon to the left of the name and others display a folder. Click a folder, and a list of programs stored in that folder appears. Click a program to open it. Point to a program to see a short description of the program.

Figure 3
All Programs
window



3. Click **Microsoft Office** to open a list of programs in the Microsoft Office folder. Click **Microsoft Office Word 2007**. (See Figure 3.) In a few seconds, the program you selected loads and the Word window appears. Notice that a button for the program appears on the taskbar. Leave Word open for the present.

Customizing the Start Menu

Both the Start menu and the desktop can be customized. You can add shortcuts to the desktop if you prefer, and you can add and delete items from the Start menu. However, if your computer is used by others, the administrator may limit some customization functions.

To add a program to the pin area of the Start menu:

1. Select the program you want to add to the pin list from the All Programs menu, and right-click it. A shortcut menu appears.
2. Click **Pin To Start Menu** on the shortcut menu. The program will be added to the pin list in the left pane above the first separator line.

To remove a program from the pin area of the Start menu:

1. Select the program you want to remove from the pin list, and right-click. A shortcut menu appears.
2. Click **Unpin From Start Menu**. The program will be removed from the pin list.

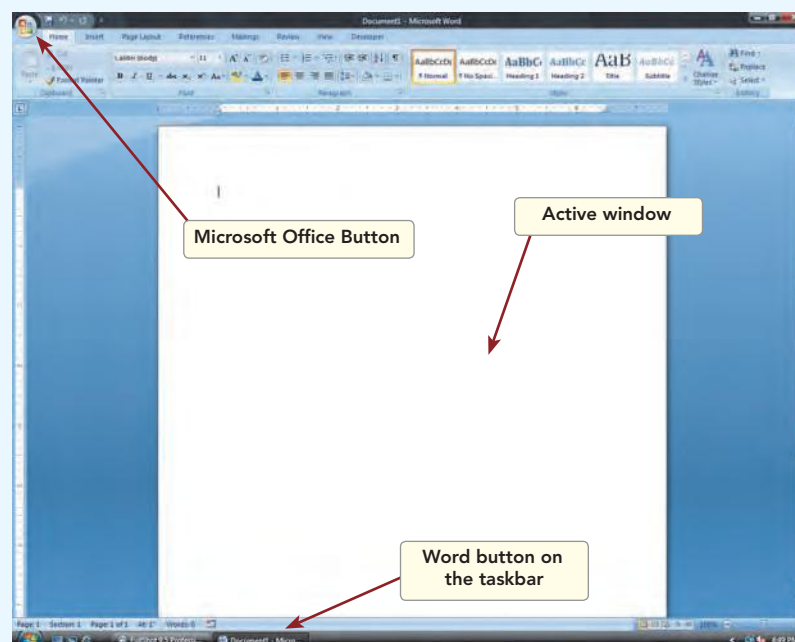
To change the order in which programs are listed in the pin area:

1. Point to the program icon.
2. Drag the icon to the desired position.

Using the Taskbar

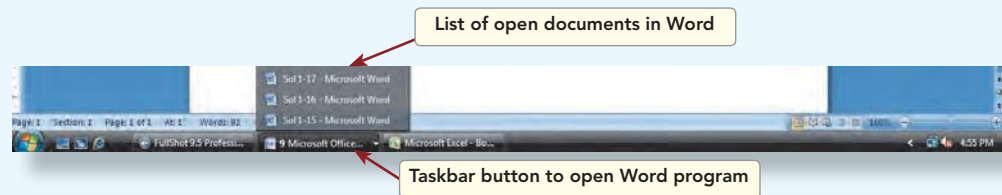
The taskbar at the bottom of your screen is one of the most important features in Windows Vista. The taskbar is divided into several segments, each dedicated to a different use. It shows programs that are running, and you can use the taskbar to switch between open programs and between open documents within a program. If your computer has the Aero interface, a thumbnail preview appears when you move the mouse over a button on the taskbar.

Figure 4
The Desktop with
the taskbar and the
Word window



Windows displays a button on the taskbar for each opened program and document. Notice that there is a button for Word, showing the Word icon and the name of the program. Point to the Word button to view a thumbnail of the document window. Since the taskbar can become crowded, Windows combines access to documents or programs under single buttons. The button shows the name of the program (Microsoft Office Word) and the number of items in the group (9). The shape of the arrow varies, depending on what the button contains. Clicking the button opens the menu of available items.

Figure 5
Button contents for
Word documents



Taskbar Notification Area

The *notification area* is on the right side of the taskbar, where the current time is usually displayed. Along with displaying the time, tiny icons notify you as to the status of your browser connection, virus protection, and so forth. It is also known as the *system tray*. In the interest of removing clutter, the notification area hides most of the icons. Clicking the Show Hidden Icons button (a left-pointing arrow) “hides” or “unhides” the icons in the notification area. Click the left-pointing arrow next to the icons to expand the notification area. Click the right-pointing arrow to hide the notification area.

TIP

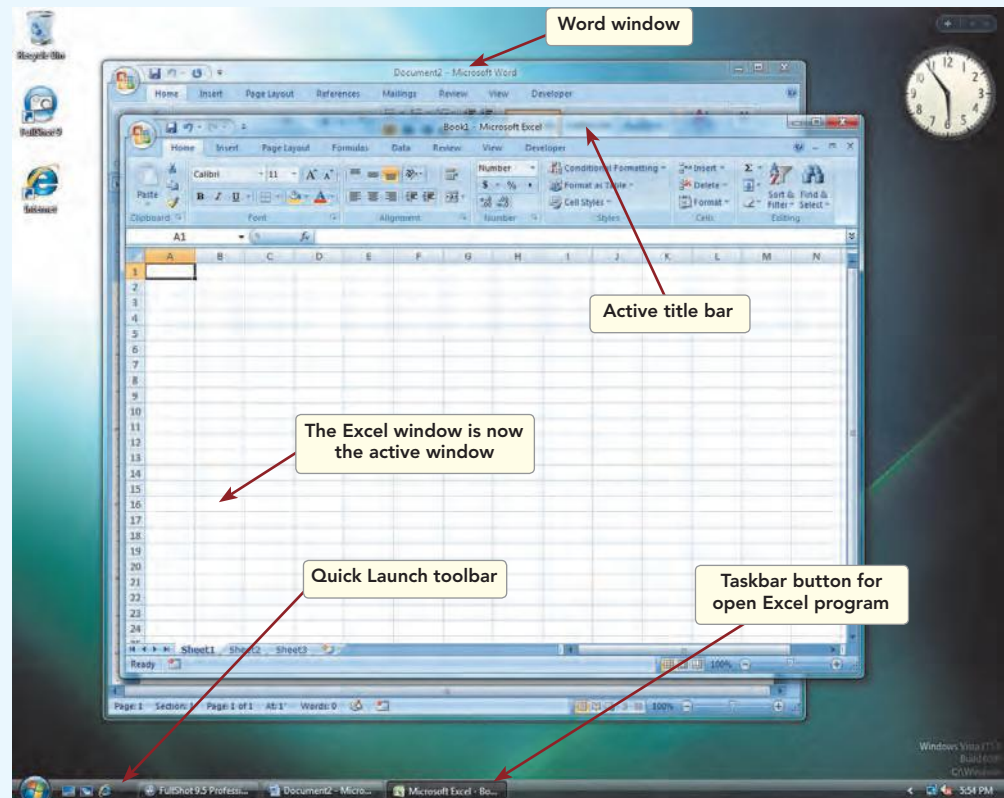
If you are not sure of what an item is or does, pointing to it without clicking displays a ScreenTip with a short description.

The Active Window

The window in which you are working is called the *active window*. The title bar for the active window is highlighted, and its taskbar button is also highlighted. The program window for Microsoft Word that you opened earlier should still be open. To examine additional features of the taskbar, open a second program, Microsoft Excel, a spreadsheet program in Microsoft Office.

1. If Word is not open, click the **Start** button and then click **All Programs, Microsoft Office, Microsoft Office Word 2007** from the Start menu. The Word window displays.
2. Click the **Start** button and then click **All Programs, Microsoft Office, Microsoft Office Excel 2007** from the Start menu. The Excel window displays. Notice how the Excel window covers the Word window, indicating that the window containing Excel is now active. Notice, too, that a new button for Excel has been added to the taskbar.

Figure 6
Excel (the active window) covering the Word window



3. Click the button on the taskbar for Word, the first program you opened. Word reappears in front of Excel. Notice the change in the appearance of the title bar for each program.
4. Click the button on the taskbar for Excel. Notice that you switch back to Excel.
5. Click the button on the taskbar to return to Word.
6. Locate the Quick Launch toolbar to the right of the Start button, and point to the Switch between windows button .
7. Click the Switch between windows button, and notice the desktop view.
8. Click the Excel window.



Changing the Size of the Taskbar

You can change the size of the taskbar using your mouse if your toolbar is crowded. It is usually not necessary, because of the multiple document style buttons and other hide/unhide arrows on the taskbar. Before you can change the size of the taskbar, it may be necessary for you to unlock it. To unlock the taskbar, right-click an open area of the taskbar and click **Lock the Taskbar** to remove the checkmark. A checkmark is a toggle command. Click to turn it off, and click a second time to turn it on.



1. Move the pointer to the top edge of the taskbar until it changes from a pointer to a two-pointed arrow . Using the two-pointed arrow, you can change the size of the taskbar.

2. With the pointer displayed as a two-pointed arrow, hold down the left mouse button and move the arrow up until the taskbar enlarges upward.
3. Move the pointer to the top edge of the taskbar once again until the two-pointed arrow displays. Hold down the left mouse button, and move the arrow down to the bottom of the screen. The taskbar is restored to its original size.

Using Menus

Windows uses a system of menus that contain a choice of options for working with programs and documents. Most Windows programs use a similar menu structure. These operations are either mouse or keyboard driven. They are called commands because they “command” the computer to perform functions needed to complete the task you, the user, initiate at the menu level.

Executing a Command from a Menu

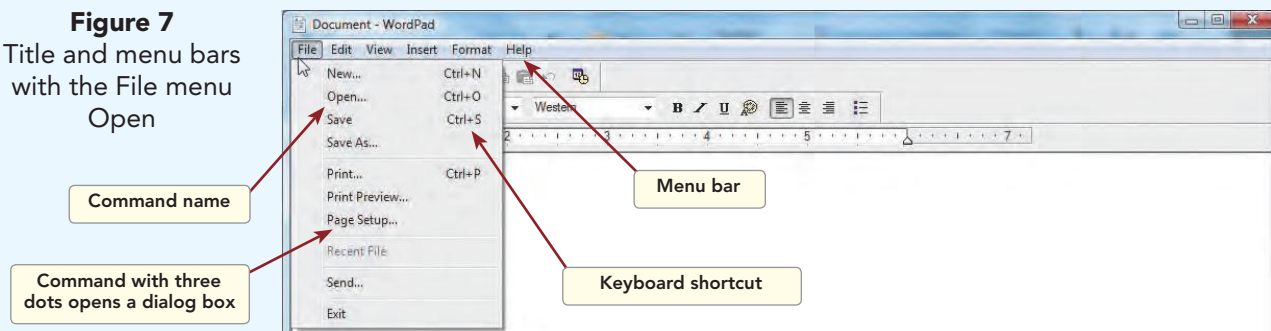
In Windows, a program may display a *menu bar*, a row of descriptive menu names at the top, just below the title bar. You open a menu by clicking the menu name listed in the menu bar. When a menu is opened, a list of command options appears. To execute a particular command from an open menu, press the left mouse button and then drag down and release the chosen option (click and drag). You can also click the command once the menu is open.

Keyboard Menu Commands

For people who prefer to use the keyboard to a mouse, Windows has provided keyboard commands for many menu items. You can use the keyboard to open menus and choose menu options.

Some menu items include not only the name of the command but a combination of keyboard keys. For example, under the File menu in WordPad, the Save command contains the notation **Ctrl+S** to its right. This means that you can also execute the command by pressing the **Ctrl** key together with the **S** key to save a document.

Figure 7
Title and menu bars
with the File menu
Open



Other Menu Symbols

Three dots following a menu option indicate that a dialog box is displayed when that menu option is chosen. (Dialog boxes, discussed later, are small windows requesting and receiving input from a user.) Some commands also display a check box. Click an empty check box to select the option. A checkmark will appear in the square and indicates the option is selected. To turn off the option, click the check box to remove the checkmark. Commands that appear gray or dimmed are currently not available.

Perform the following steps for keyboard command practice:

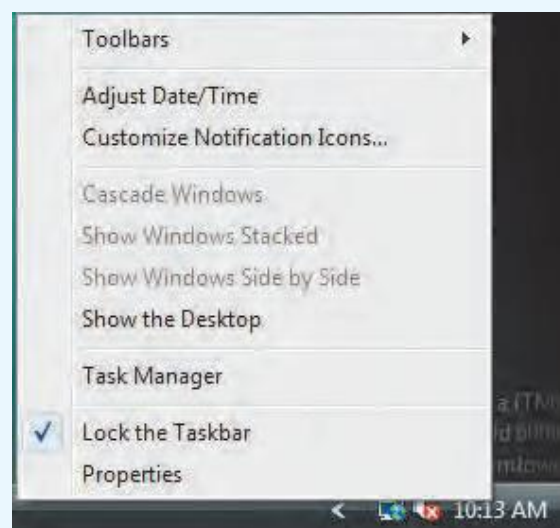
1. Open the **Start menu**, click **All Programs**, and click the **Accessories** folder. Click **WordPad**. The WordPad program opens, and a button appears on the Windows taskbar.
2. Click **File** in the menu bar. The File menu displays. Click **File** to close the menu.
3. Press **[Alt]**, and notice that the items in the menu bar display underlined letters (**F**ile, **E**dit). The underlined letters are a shortcut to open a menu. Press the letter "**F**" to open the File menu. Release **[Alt]**, and click outside the menu in a blank area to close the menu.
4. Press **[Alt]+[V]**, the keyboard shortcut for the View menu. The View menu displays.
5. Notice the four check boxes. All are selected. Click the **Options** command. The Options dialog box opens.
6. Click **Cancel** to close the dialog box.
7. Click **File** in the menu bar. Click **Exit**. Click **Don't Save** if prompted to save the document.

Displaying a Shortcut Menu

When the mouse pointer is on an object or an area of the Windows desktop and you right-click, a shortcut menu appears. A shortcut menu typically contains commands that are useful in working with the object or area of the desktop to which you are currently pointing.

1. Position the mouse pointer on a blank area of the desktop, and right-click. A shortcut menu appears with commands that relate to the desktop, including view and sort options.
2. Click outside the shortcut menu to close it.
3. Right-click the time in the bottom right corner of the taskbar. A shortcut menu appears.
4. Click **Adjust Date/Time** on the shortcut menu. The Date/Time Properties dialog box appears. You can use this dialog box to adjust your computer's date and time.

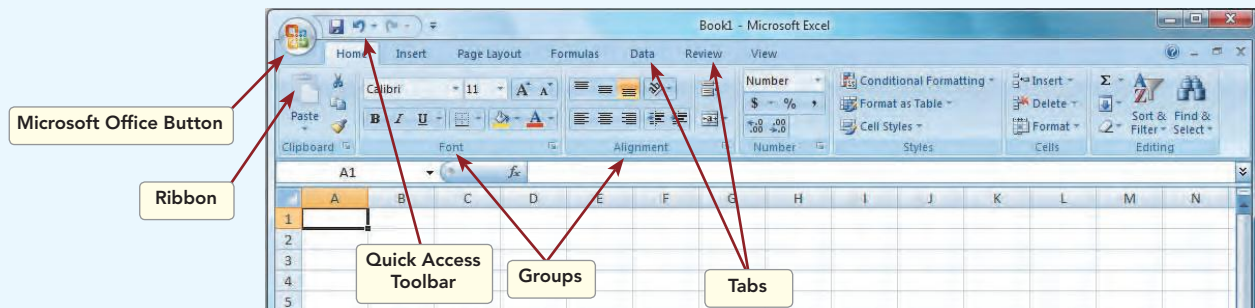
Figure 8
The Time shortcut
menu



5. Click **Cancel**.
6. Right-click an icon on the desktop to display its shortcut menu, and then close the shortcut menu.

Using the Ribbon

Microsoft Office 2007 applications include a Microsoft Office Button, a Quick Access Toolbar, and a Ribbon. The *Microsoft Office Button* displays the Office menu which lists the commands to create, open, save, and print a document. The *Quick Access Toolbar* contains frequently used commands and is positioned to the right of the Microsoft Office Button. The *Ribbon* consists of seven tabs by default, and each tab contains a group of related commands. The number of commands for each tab varies. A command can be one of several formats. The most popular formats include buttons and drop-down lists.

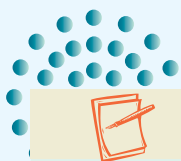


1. Activate the Excel program.
2. Point to and click the **Microsoft Office Button**. Notice the commands and icons in the menu.
3. Click a blank area of the window to close the menu.
4. Locate the Quick Access Toolbar beside the Microsoft Office Button. Point to each button in the Quick Access Toolbar to identify it. Notice that a keyboard shortcut displays beside each button.
5. Click the **Page Layout** tab. Notice the change in the groups and commands.
6. Click the **Home** tab.

Using Dialog Boxes

Windows programs make frequent use of dialog boxes. A *dialog box* is a window that requests input from you related to a command you have chosen. All Windows programs use a common dialog box structure.

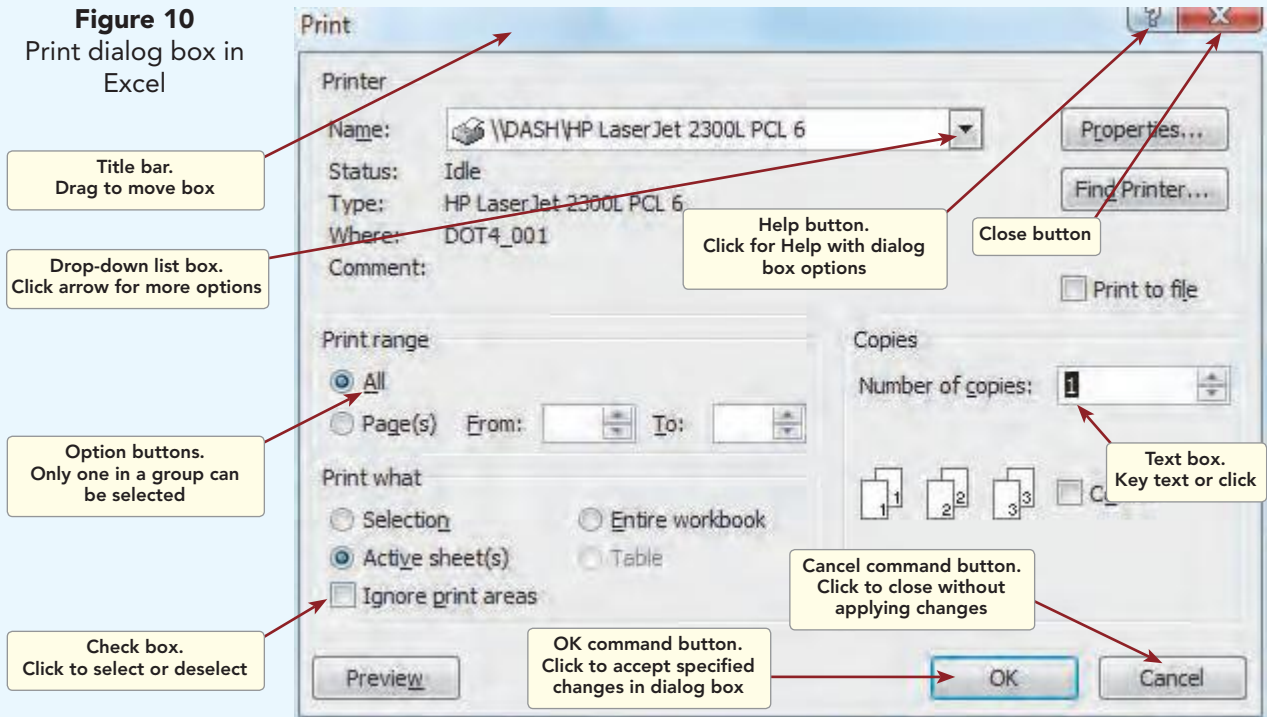
1. Click the Excel program button on the taskbar to make Excel the active window if necessary.
2. Click the **Microsoft Office Button**. The File menu displays.
3. Click **Print** to display the Print dialog box.
4. The Print dialog box contains several types of dialog box options.



NOTE

A keyboard shortcut is available for the print dialog box: Press **[Ctrl]+[P]** to open the Print dialog box.

Figure 10
Print dialog box in
Excel



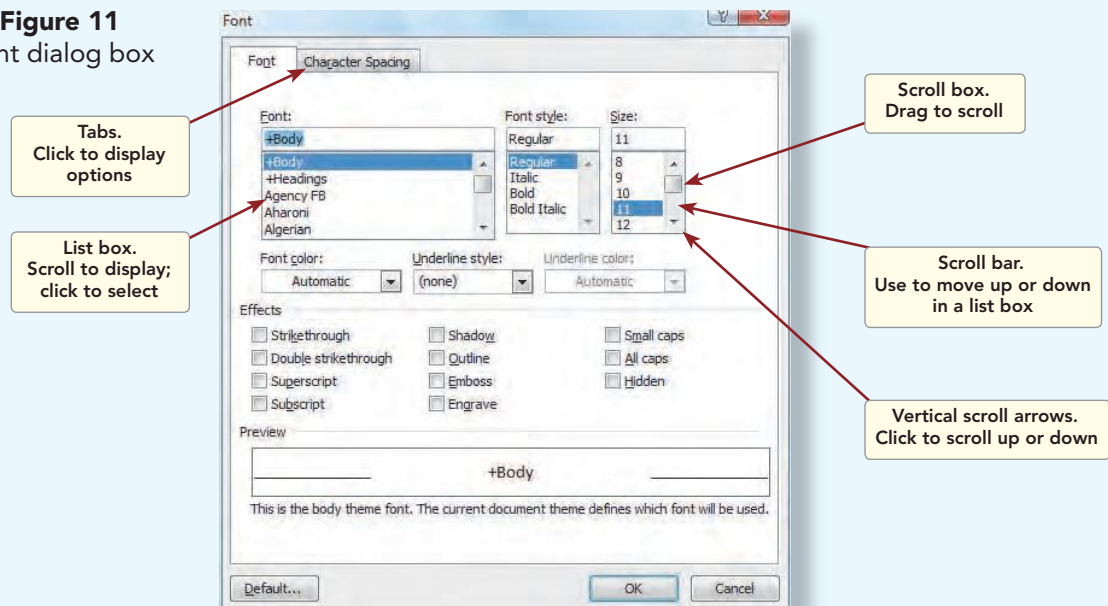
5. To close the Print dialog box, click **Cancel**, located in the lower right corner of the dialog box. The Print dialog box closes without applying any changes.

Another type of dialog box uses tabs to display related options. Only one tab can display at a time. The Word Font dialog box offers many options for choosing character formatting.

1. Make Word the active window.
2. Click the **Home** tab, and click the small arrow that appears on the right of the Font group . The Font dialog box displays.



Figure 11
Font dialog box



The scroll boxes are used to specify a font by name, its style, and its size. When you select a paragraph in a Word document, you can select its typographic features using this dialog box. The Font list box at the top left displays a list of all the typefaces installed on your computer. By clicking the name of the font, you select it for your paragraph.

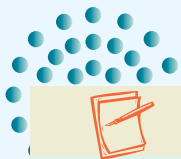
The vertical scroll bar on the right side of a list box or a window indicates that there is more content to view. To view the hidden content, click the downward-pointing arrow or the upward-pointing vertical scroll arrow. You can also drag the scroll box on the scroll bar up or down to view all the content. The Character Spacing tab at the top of the Font dialog box displays additional character formatting options. Click the Character Spacing tab to view its contents, and then return to the Font tab.

Use the Font dialog box to style a paragraph as follows:

1. Type a very short paragraph in your Word document.
2. Position the I-beam at the beginning of the text, and hold down the left mouse button.
3. Drag the mouse to the end of the paragraph. The paragraph will change color, showing that it has been selected.
4. Open the Font dialog box by pressing **Ctrl**+**D**.
5. In the Font list box, click **Verdana**. You may need to scroll down to locate it.
6. In the Font style box, click **Bold**.
7. In the Size box, click **12**.
8. If you wish to change the color of your paragraph, move your pointer to the Font color drop-down list box and click the down-facing arrow. A color pallet appears. Point to the color you wish to use, and click.
9. When you have completed your selections, click **OK** at the bottom of the Font dialog box and look at the paragraph you have styled. If you wish, you can try other font formats, while your paragraph is selected.

Changing the Size of a Window

You can change the size of any window using either the mouse or the sizing buttons. Sizing buttons are the small buttons on the right side of the title bar that allow you to minimize or maximize the window (see Figure 12). This can be especially useful when you would like to display several open windows on your desktop and see them simultaneously.



NOTE

Notice that the window occupies the entire desktop, and the Maximize button has changed to a Restore Down button.

This type of function is known as a toggle: When a button representing one state (Maximize) is clicked, an action is performed, the button toggles to the alternate state, and the other button (Restore Down) appears. A number of actions in Windows operate this way.

1. Make Excel the active window, if it is not already. Click the Maximize button on the Excel title bar if the Excel window does not fill the entire desktop.

Figure 12
Sizing buttons

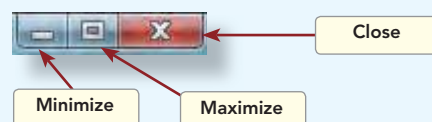


Table 4 describes these buttons. To practice changing the size of a window, follow these steps:

TABLE 4 Sizing Buttons

BUTTON	USE
Minimize	Reduces the window to a button on the taskbar.
Maximize	Enlarges the window to fill the entire desktop (appears only when a window is reduced).
Restore Down	Returns the window to its previous size and desktop position (appears only when a window is maximized).



NOTE

You can double-click a window title bar to maximize or restore the window or right-click the program button on the taskbar and choose minimize, maximize, restore, or close.

- Click the **Restore Down** button on the Excel title bar. The Excel window reduces in size, and the Word window appears behind it. The Restore Down button has now changed to a Maximize button. Notice that the highlighted title bar of the Excel window indicates it is the active window.
- Click the **Minimize** button. The Excel window disappears, and its button appears on the taskbar.

How to Display Two Program Windows Simultaneously

- Open the **Start** menu, and click **All Programs** to open Excel and Word if they are not already open from an earlier section of the tutorial.

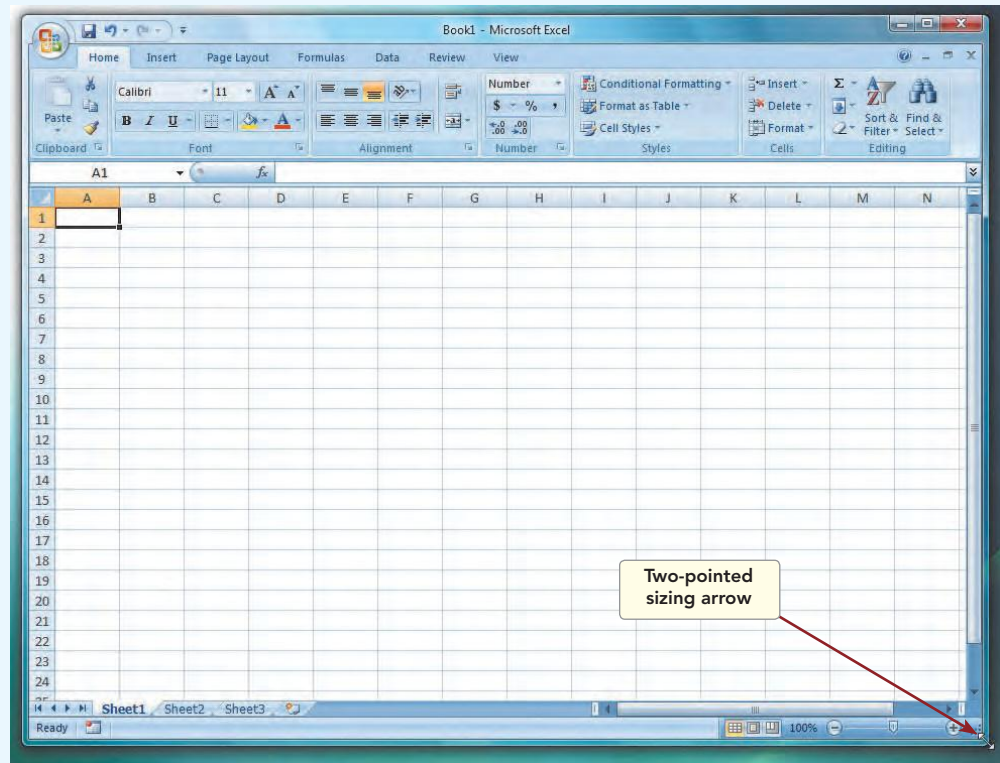
TIP

Sometimes the borders of a window can move off the computer screen. If you are having trouble with one border of a window, try another border or drag the entire window onto the screen by using the title bar.

- Click the **Excel** button on the taskbar to move its window to the front of the screen.
- Click the **Restore Down** button if the Excel window is maximized.
- Move the pointer to the right border of the Excel window. The pointer changes to a horizontal two-pointed arrow.
- With the two-pointed arrow displayed , drag the border to the left to make the window narrower.



Figure 13
Sizing a window



NOTE

You can place the pointer on any part of the window border to change its size. To change both the height and width of the window, move the pointer to the bottom right corner of the window. The double-pointed arrow changes its orientation to a 45-degree angle (see Figure 13). Dragging this arrow resizes a window vertically and horizontally.



NOTE

The taskbar contains options to Show Windows Stacked, Cascade Windows, and Show the Desktop.



6. Click the title bar or any part of the Word window behind the Excel window. The Word window becomes the active window. The Excel window is still open, but it is now behind the Word window.
7. Click the **Maximize** button if the Word window does not fill the entire desktop.
8. Click the **Minimize** button on the title bar of the Word window. The Excel window becomes the active window.
9. Make the Word window the active window by clicking the **Word** button on the taskbar.
10. Click the **Restore Down** button on the Word window. The Word window reduces in size. The Excel window might be partially visible behind the Word window. You can drag the two reduced windows so that parts of both can be seen simultaneously.
11. Right-click the taskbar, and click **Show Windows Side by Side**. The windows display vertically.
12. Press the **[Alt]** key, and hold it down while pressing **[Tab]**. You can switch to the previous window by pressing this shortcut, or you can continue to press **[Tab]** to switch to an open window on the desktop.
13. Click the **Show Desktop** button  located on the Quick Launch toolbar to see the desktop. The Word and Excel programs are minimized.
14. Click the **Show Desktop** button again to restore the programs.
15. Click the **Close** buttons on the title bars of each of the two program windows to close them and to show the desktop.

Using the Documents Command

Windows lets you open a recently used document by using the Recent Items command on the Start menu. This command allows you to open one of up to fifteen documents previously saved on your computer.

1. Click the **Start** button on the taskbar to display the Start menu.
2. Click **Recent Items**. The Recent Items submenu appears, showing you up to the last fifteen documents that were saved.
3. Click a document. The program in which the document was created opens, and the document displays. For example, if the document you chose is a Word document, Word opens and the document appears in a Word program window.
4. Click the program window's **Close** button. The program window closes, and the desktop is clear once again.

Changing the Desktop

The Control Panel lets you change the way Windows looks and works. Because your computer in school is used by other students, you should be very careful when changing settings. Others might expect Windows to look and work the standard way. Having Windows look or work in a nonstandard way could easily confuse other users. (Table 5 describes how to access other settings.)

To change the appearance of your computer, follow these steps. Talk to your instructor first, however, before changing any settings on your computer.

1. Click the **Start** button on the taskbar.
2. Click **Control Panel** on the right pane. The Control Panel window displays.
3. Click the **Appearance and Personalization** link. The Appearance and Personalization window displays.
4. Click **Personalization** and click **Window Color and Appearance**.
5. Click **Default** and click **OK**.
6. Close the Appearance and Personalization window.

TABLE 5 Setting Options

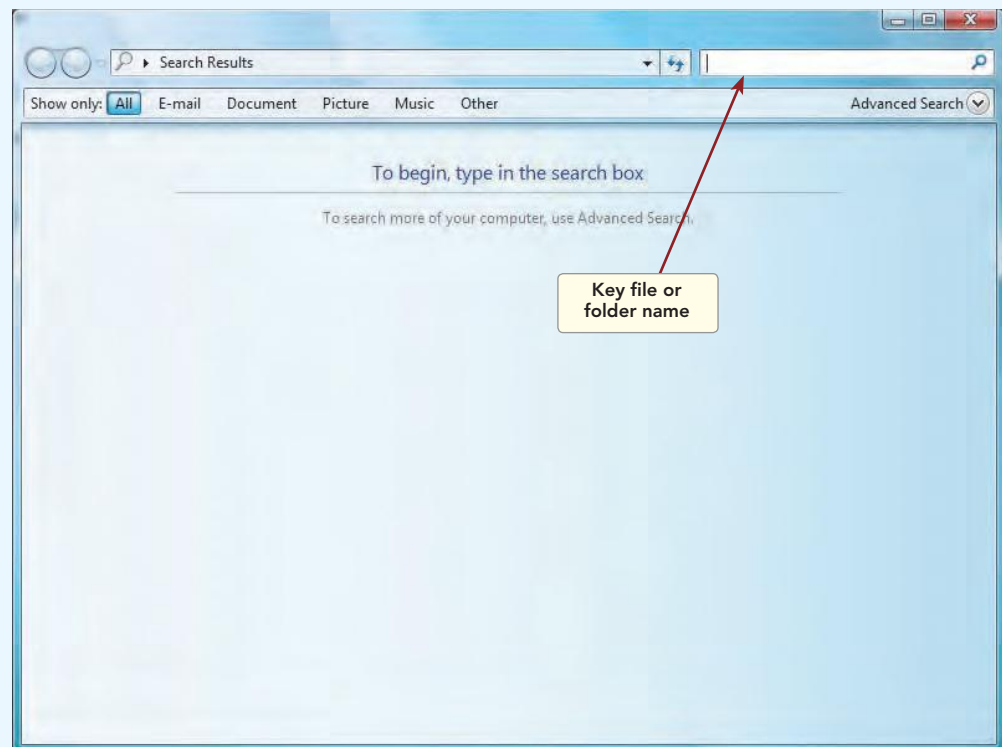
OPTION	USE
Control Panel	Displays the Control Panel window, which lets you change background color, add or remove programs, change the date and time, and change other settings for your hardware and software. The items listed below are accessed from the Control Panel.
Network and Internet	Includes options to view the network status, connect to a network, set up file sharing, change Internet options, and so on.
Hardware and Sound	Includes options to add a printer, change default settings for AutoPlay, sound, mouse settings, keyboard, and so on.
Appearance and Personalization	Includes options to change the desktop background, adjust screen resolution, customize the Start menu and icons on the taskbar, and change sidebar properties.

Using the Search Command

If you do not know where a file or folder is located, you can use the Search command on the Start menu to help you find and open it.

1. Click the **Start** button on the taskbar. Notice the blinking insertion point in the Start Search box. You can start typing the name of a program, folder, or file immediately.
2. Click **Search** in the right pane of the Start menu. The Search Results dialog box appears.
3. Click **Document** in the Show Only section.

Figure 14
Search Results
dialog box



4. Type the name of the file or folder you want to find in the Search box. View the search results.

To search for files by date, size, type, or other attributes, click **Advanced Search**.

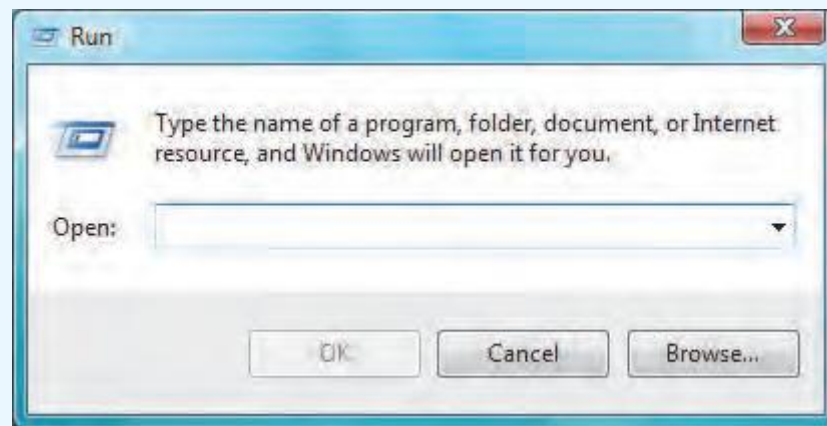
1. Click the arrow to the left of the Search Results text box to specify where you want Windows to search. The default location is the C drive.
2. Click **Search** to start the search. Any matches for the file are shown in the right pane of the dialog box.
3. Double-click any found item to open the program and view the file or folder Windows has located.
4. When you are finished with your search, close all open windows and clear your desktop.

Using the Run Command

Windows allows you to start a program by using the Run command and typing the program name. This command is often employed to run a “setup” or “install” program that installs a new program on your computer. It is best to use this command after you have become more familiar with Windows Vista.

1. Click the **Start** button on the taskbar.
2. Click All Programs, and click the Accessories folder.
3. Click **Run**.

Figure 15
Run dialog box



4. If you know the name of a program you want to run, type the name in the Open text box. Often you will need to click **Browse** to open a drop-down list of the disk drives, folders, and files available to you.
5. Click **Cancel** to close the Run dialog box.
6. Open the **Start** menu, and locate the Start Search box.
7. Key **run**, and notice that the Start menu displays the Run program.
8. Click the program name, and the Run dialog box displays.
9. Close the Run dialog box.

Deleting Files Using the Recycle Bin

The *Recycle Bin* is the trash can icon on your desktop. To delete a file:

NOTE

As a protection against deleting a file unintentionally, any file you have placed in the Recycle Bin can be undeleted and used again.

1. Click its icon, and drag it to the Recycle Bin.
2. Double-click the **Recycle Bin** icon. A window opens listing files you have deleted.
3. To undelete a file, merely drag it out of the Recycle Bin window and place it on the desktop or right-click the file and click Restore.
4. To empty the Recycle Bin and permanently delete files, click Empty Recycle Bin in the Recycle Bin dialog box, or right-click the Recycle Bin icon. The shortcut menu appears.
5. Click **Empty Recycle Bin**.

Exiting Windows

You should always exit any open programs and Windows before turning off the computer. This is the best way to be sure your work is saved. Windows also performs other “housekeeping” routines that ensure everything is ready for you when you next turn on your computer. Failure to shut down properly will often force Windows to perform time-consuming system checks the next time it is loaded. You can either log off the computer to make it available for another user, or shut it down entirely.

To Log Off



1. Click the **Start** button on the taskbar.
2. Click the arrow to the right of the Lock this computer button , and click **Log Off**.

To Shut Down

To exit Windows, use the Lock this computer command on the Start menu. This command has several shut-down options.

- *Restart*: Restarts the computer without shutting off the power. This is sometimes necessary when you add new software.
 - *Shut down*: Closes all open programs and makes it safe to turn off the computer. Some computers will turn off the power automatically.
 - *Sleep*: Puts the computer in a low-activity state. It appears to be turned off but will restart when the mouse is moved. Press the computer power button to resume work.
1. Click the **Start** button on the taskbar.
 2. Click the arrow beside the Lock this computer button.
 3. Click the **Shut Down** option.
 4. Windows prompts you to save changes in any open documents. It then prepares the computer to be shut down.

case study

There is more to learning an e-mail messaging client and time and management program like Microsoft Outlook than simply writing and replying to e-mail messages. Not only do you need to understand how to use Outlook's e-mail feature, but you need to know how to use all the integrated features of Outlook in a real-world situation. That's why all these lessons relate to everyday business situations.

As you work through the lessons, imagine yourself working as an intern for AllWood Mills, Inc., a furniture manufacturer based in Dubuque, Iowa.

AllWood Mills, Inc.

Starting with a table saw in his garage, Rob Connelly has grown his furniture-making hobby into a chain of six retail furniture stores in five Midwestern states. Even as a teenager, Rob spent much of his free time building tables, desks, and bookcases. He continued his hobby through his college years, and he eventually left medical school to pursue his passion for making furniture. His period designs and attention to fine detail created a demand for his furniture that stretched far beyond his first modest storefront in Dubuque, Iowa.

AllWood Mills designs, manufactures, and sells custom-made furniture. As reflected in their name, AllWood makes only wood furniture.

AllWood sells furniture for the bedroom, living room, and dining room. They also sell products for computer and media storage. Their furniture is available in four different styles: Mission, Shaker, Colonial, and Contemporary. In keeping with Rob's earliest pieces, each AllWood product is individually crafted in the style of a fine antique. Over the years, AllWood has found great favor with customers who want hand-crafted furniture at affordable prices.

In addition to their Dubuque store, AllWood also has retail outlets in Chicago, Minneapolis, Milwaukee, St. Louis, and Kansas City. AllWood's strategy is to locate a retail outlet in a major metropolitan center because the company expects to draw most of its customers from an area within 150 miles of its retail outlet. AllWood's headquarters and manufacturing facility is located in Dubuque, a central location for the other retail outlets.

AllWood Mills, Inc. and You

In your work as an intern at AllWood, Inc., you will have a chance to meet many of the people who work at AllWood.

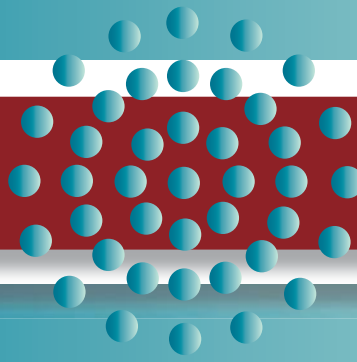
All of the work you do with Microsoft Outlook in this course will relate to AllWood, Inc. You will also discover that your work in this course will involve e-mails sent to, and received from, your fellow classmates. For the purpose of this class, treat your classmates as interns at AllWood. As you work through the course, take the time to notice the following things:

- The types of e-mail and Outlook tasks required in a small business to carry on day-to-day business

- The format and tone used for e-mail (see the “Guidelines for Using E-mail” on the next page)
- The types of business that are appropriately conducted using e-mail
- The way that a business can increase efficiency by using the integration available between the various Outlook components

As you use this text and become more experienced with Microsoft Outlook, you will also gain an understanding of how small businesses actually use the integrated components of Microsoft Outlook.

unit I



OUTLOOK BASICS

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Lesson 1

Introduction to Outlook and E-mail

OBJECTIVES

MCAS OBJECTIVES

In this lesson:

OL07 1.1.1
OL07 1.1.2
OL07 1.1.3
OL07 1.1.4
OL07 1.3.1
OL07 1.3.2
OL07 1.3.3
OL07 1.3.4
OL07 1.7.1
OL07 1.7.2

After completing this lesson, you will be able to:

1. Start Outlook and identify parts of the Outlook window.
2. Create, send, and reply to an e-mail message.
3. Manage e-mail message attachments.
4. View and print e-mail messages and close Outlook.

Estimated Time: 1½ hours

Microsoft describes Office Outlook 2007 as a messaging client that is also a complete time and information manager. In this lesson you begin your work by becoming familiar with the Outlook environment. Then you learn how to send and receive e-mail messages, how to handle e-mail message attachments, and how to view and print e-mail messages.

Starting Outlook and Identifying Parts of the Outlook Window



There are several ways to start Outlook, depending on your system setup and personal preferences. You can use the Start button on the Windows taskbar, click the Outlook button on the Quick Launch toolbar , or double-click the Outlook shortcut  that might be on the desktop.

After you've started Outlook, you can familiarize yourself with the program's environment and learn how to use the various controls it offers.

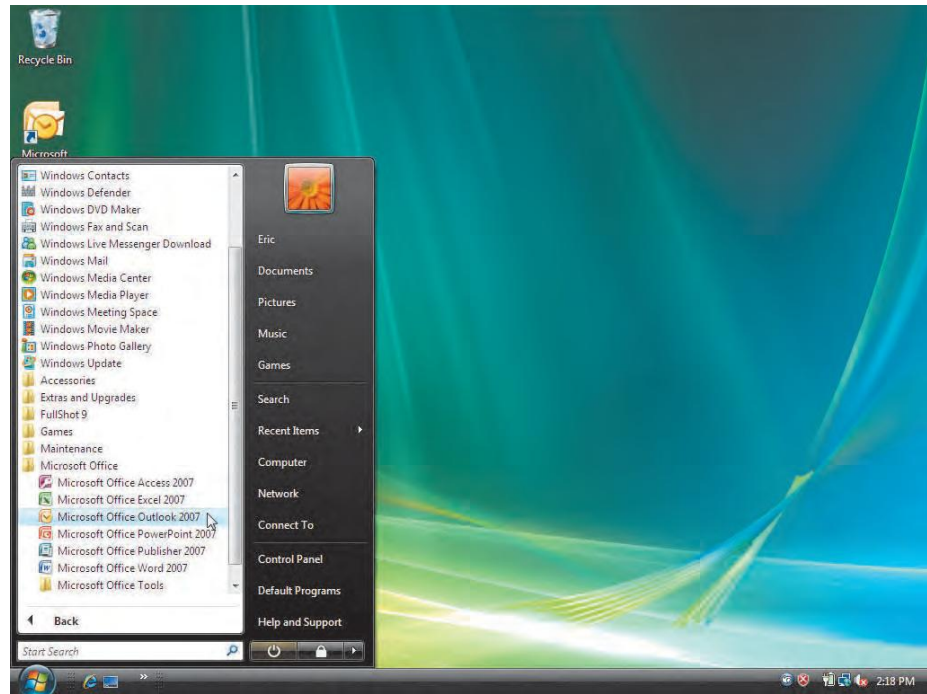
Exercise 1-1 START OUTLOOK

You can start Outlook by using the Start menu or by clicking an icon on the Windows desktop or on the Quick Launch toolbar.



1. If necessary, turn on your computer and log on to your account.
2. Click the Start button  on the taskbar and hover over **All Programs**.

Figure 1-1
Starting Outlook
from the Windows
taskbar

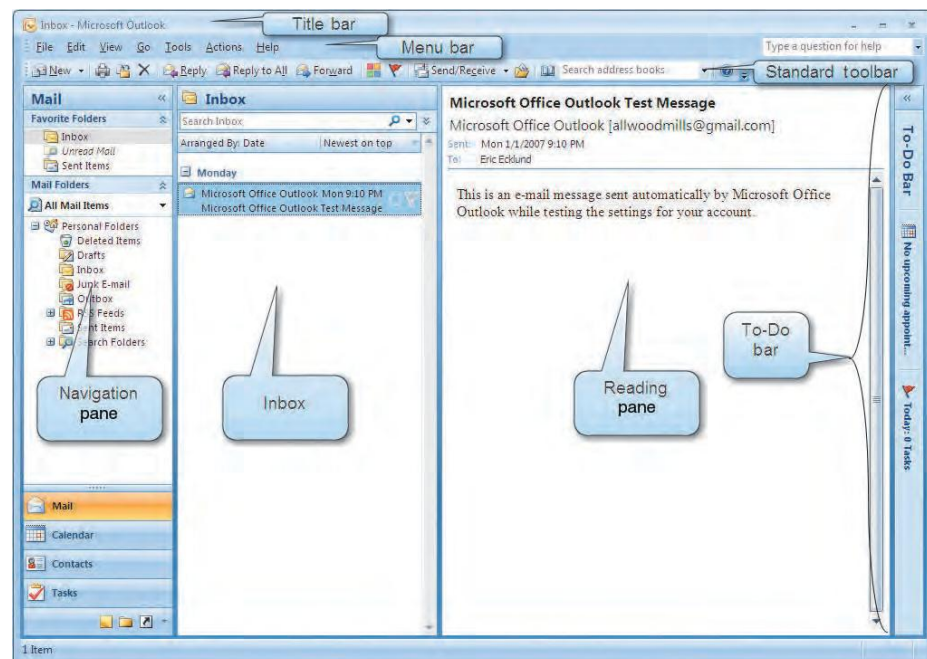


NOTE

Your Outlook window may look different than the one in Figure 1-2. Your environment preferences are preserved by Outlook for the appearance of elements such as the Navigation pane and To-Do bar from session to session.

3. Click **Microsoft Office** and then click **Microsoft Office Outlook 2007**. After a few moments the program will load and the Outlook window will appear.
4. Maximize the window to fill the screen if necessary.
5. Click the **File** menu and select **Print**.

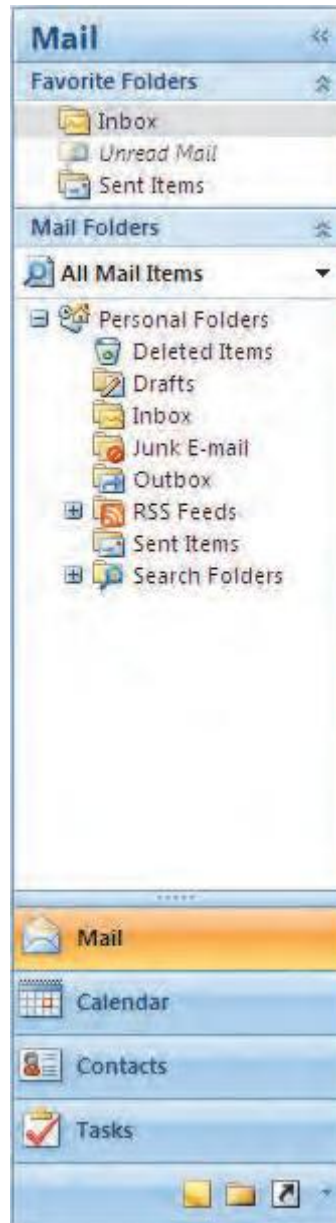
Figure 1-2
Parts of the Outlook
environment



Exercise 1-2

NAVIGATE IN OUTLOOK BY USING THE NAVIGATION PANE

Figure 1-3
Navigation pane in
Normal view



Like most programs, Outlook offers a variety of menus and toolbars you can use to accomplish tasks. The *Navigation pane* is the primary tool in Outlook for switching between the program's different components: Mail, Calendar, Contacts, Tasks, and others. The Navigation pane also provides access to different views and other features for each component.

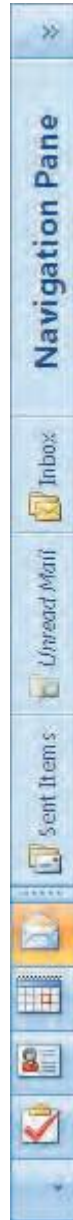
1. If the Navigation pane is not displayed, you can display it by choosing **View** from the menu bar, then hover over **Navigation Pane** and choose **Normal** from the cascading menu. The Navigation pane appears as a column on the far left side of the Outlook window.
2. In Normal view, the Navigation pane displays a list of folders, views, or features for the current program component. To display the Navigation pane in minimized view, click the chevrons  at the top of the Navigation pane to minimize the pane to a narrow bar running down the left of the window. We will refer to this minimized view as the Navigation bar.
3. On the Navigation bar click the **Navigation Pane** tab. This temporarily opens the special features for the program component you are currently using. Click the chevrons on the **Navigation Pane** tab to return to the full Navigation bar.
4. Click the Calendar button  to display Outlook's calendar component.

**TIP**

The appearance of the Navigation pane can also be fully controlled from the View menu. Alternatively, you can use the keyboard shortcut **Alt+F1** to cycle through the available settings.

5. Click the Contacts button  to display Outlook's contacts component. This view is likely empty at this time since you haven't created any contacts.
6. Click the Tasks button  to display Outlook's task tracking, or to-do, component. This view is likely also empty since you haven't created any tasks.

Figure 1-4
Navigation pane
minimized to show
the Navigation bar



7. Click the Mail button  to return to the mail component of Outlook. By default this view displays a central pane for your Inbox, which is where new messages are displayed, and a pane to the right that displays the contents of the currently selected message.
8. Click the **Navigation Pane** tab to display the folder list. This list allows you to move from viewing your Inbox to other folders containing mail items. You can create additional folders as needed.
9. Click the chevrons on the **Navigation Pane** tab again to return to the Navigation bar.

Creating, Sending, and Replying to an E-mail Message

To send an e-mail message to someone, all you need is their address. An *Internet e-mail address* consists of the user's name, the @ symbol (known as the "at" sign), and their domain name. The domain name consists of two or more parts, with periods between them, that identify the name of the server or servers that process the mail. Thus, a complete e-mail address may look something like: allwoodmills@gmail.com.

When sending e-mail messages, it is possible to send the message to more than one recipient and/or send copies of the messages to others. If necessary, messages that have already been sent can be resent, either to the original recipients or to new addresses.

When you receive messages, you can choose to reply to the sender, or to the sender and everyone else who received the message. You can also choose to forward the message to someone else.

Exercise 1-3 SEND AN E-MAIL MESSAGE

There are several ways to begin the process of sending an e-mail message in Outlook. You can:

- Press **Ctrl+N** while viewing the Inbox.
- Press **Ctrl+Shift+M** while viewing any part of Outlook.
- Click the New button while viewing the Inbox.
- Choose Mail Message from the drop-down list of the New button.



NOTE

The New button creates a new object appropriate to the current component of Outlook you are using. When you're using the calendar, the New button creates a new appointment. When you're using the Inbox, it creates a new mail message.



1. Verify that you are viewing the Inbox. Click the New button  on the Standard toolbar. The blank e-mail message form opens.
2. In the **To** text box, key an e-mail address for the intended recipient. Be sure not to use any spaces.

**NOTE**

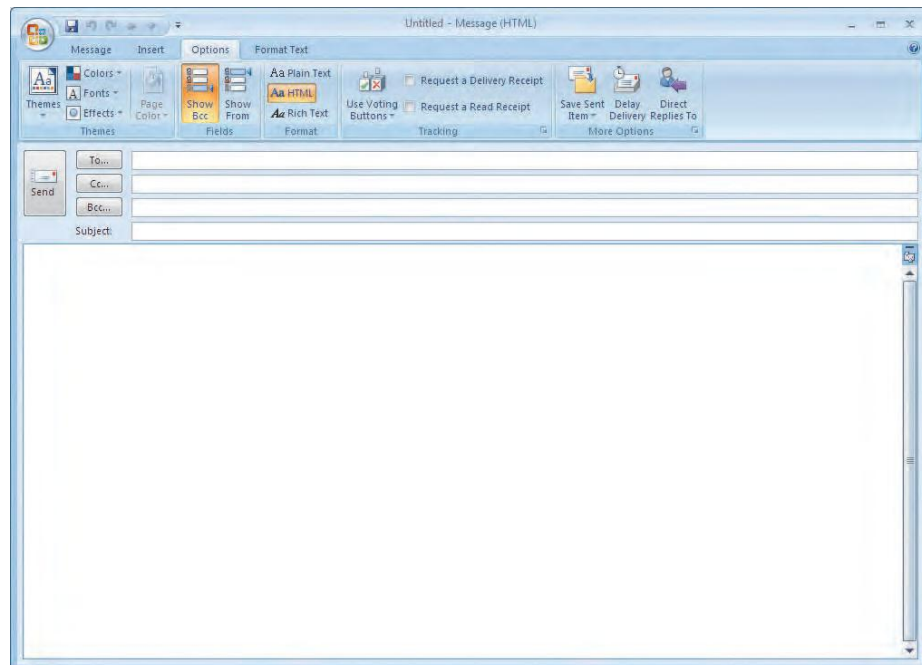
Your instructor will provide you with a list of e-mail addresses to be used with the exercises in this text.

**NOTE**

The Ribbon appears when you're creating new items in Outlook. It is a replacement for menus and toolbars meant to give you easier access to program functions and features. In Outlook the Ribbon is only used when creating new items, such as new e-mails, contacts, or appointments.

3. Key a **;** and type the address for a second recipient. When keying multiple addresses, use a semicolon to separate them.
4. Move to the Cc text box by pressing **[Tab]**. Addressees in this box will receive a copy of the message. Both the addresses in the To text box and the addresses in the Cc text box will be displayed to the message recipients. Leave this text box blank at this time.
5. By default, Outlook does not display the Bcc text box. Bcc is used to send copies of the message to recipients without revealing their addresses to those who receive the message. To turn the Bcc box on for this and future messages, click the **Options** tab above the *Ribbon*. Click the **Show Bcc** option on the Ribbon to display the Bcc text box.

Figure 1-5
E-mail message form
with Bcc text box
displayed



6. Click the **Message** tab above the Ribbon. Move to the Bcc text box by pressing **[Tab]**.
7. Enter your own e-mail address in the Bcc text box.
8. Press **[Tab]** to move to the Subject text box.
9. Key **Sales Update for Last Month**. Press **[Tab]** to move to the body of the message.
10. Key the text shown in Figure 1-6.

Figure 1-6

Jasmine wanted me to extend her congratulations and thanks to all associates for their contributions last month. Our end-of-month sales figures were over 20% higher than our sales for the same month last year. Jasmine would like all supervisors and managers to pass this message on to their direct report employees in person.

11. Proofread your message and double-check the accuracy of the e-mail addresses you entered in the To and Cc text boxes.
12. Click the Send button  to the left of the address text boxes. The message form will close and Outlook will return to the Inbox.
13. The time it takes for your copy of the message to appear in your Inbox is dependent on your Internet service provider's (ISP's) mail server and other factors. When the message arrives, Outlook has several different methods of letting you know.

NOTE

Outlook's default setting is to send e-mail messages immediately when connected to the Internet.

Depending on your settings Outlook may play a sound, briefly change the mouse pointer, display an envelope icon in the notification area on the taskbar (near the time), and/or display a notification directly on the desktop. By default all of these settings are enabled.

Exercise 1-4 RESEND AN E-MAIL MESSAGE

E-mail messages you have sent using Outlook are stored in a folder called Sent Items. From this folder it is easy to review the content of past messages. You can also resend messages from here, either to the original recipients, or someone new.

NOTE

It is necessary to open a message in order to resend it.

1. Click the **Navigation Pane** area on the Navigation bar.
2. Click **Sent Items** in the list of Mail Folders.
3. Locate the message you sent in Exercise 1-3 and double-click it to open it.

4. Click **Other Actions** on the Ribbon and choose **Resend This Message** from the cascading menu.
5. A message form opens containing everything that was in your original message except the contents of the To text box. At this point, if you were going to resend the message, you would fill in the appropriate addresses and then click Send. Do not click Send at this time. Instead, close the message form by clicking the close button .

Exercise 1-5 RESPOND TO AN E-MAIL MESSAGE

There are several ways to respond to a received e-mail message. You can use:

- Reply, which sends a message back to the original sender.
- Reply to All, which sends a message back to the original sender and everyone else who received the message.
- Forward, which allows you to send the message on to a new recipient.

With each of these three options, the content of the original message is placed in the body of the new message with header information that includes who sent the original, when it was sent, and the subject line. You can edit all of this information, allowing you to remove anything that isn't pertinent to your response. You can also add your own comments at the top of the message.

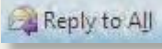
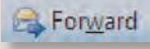
While the actual process for responding to a message is very simple, regardless of the type of response, it is very important to understand the difference between Reply and Reply to All. With Reply to All you will be sending your response to everyone who received the original message. This could include hundreds, if not thousands, of recipients. Additionally, because of the Bcc addresses, you may not even know who you are sending your response to! Because of this you should be very cautious when using Reply to All.



TIP

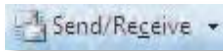
Reserve the use of the Reply to All feature for those times when you are absolutely sure about who received the original message and you actually want all recipients to read your reply. This feature can be useful in carrying on a sort of group discussion via e-mail.

TABLE 1-1 Options for Responding to an E-mail

Button	Shortcut	Purpose
 Reply	Ctrl + R	Reply to sender
 Reply to All	Ctrl + Shift + R	Reply to sender and all original recipients
 Forward	Ctrl + F	Send message to new recipient

**TIP**

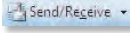
Messages you haven't read yet are displayed in the Inbox in bold with a closed-envelope icon. Messages you have read are not bold and have an open-envelope icon. Additionally, the number of unread messages appears in parentheses next to the Inbox button on the Navigation pane or Navigation bar.

**NOTE**

If the message is still not in your Inbox after the Send/Receive process is complete, see your instructor for assistance.

**NOTE**

Both Reply and Reply to All add the text "RE:" in front of the original message subject. In all cases you may edit the subject line, including removal of the new prefixes.

1. Display the Inbox by clicking **Inbox** on the minimized Navigation bar.
2. Locate the "Sales Update for Last Month" message you sent to yourself via Bcc in Exercise 1-3. If the message is not in the Inbox yet, click the Send/Receive button  on the Standard toolbar to force Outlook to check for new messages. The keyboard shortcut for forcing Outlook to do a Send/Receive is **[F9]**.
3. Click the message to select it in the Inbox. It is not necessary to open messages to reply to them or forward them, although you can perform these operations from an open message.
4. Click the Forward button  on the Standard toolbar. A new message form opens with the original message headers and content beneath a horizontal line in the message body area. The original subject line appears in the Subject text box with "FW:" in front of it.
5. Enter an address to forward this message to in the To text box. Your instructor will provide this address.
6. Click in the message body area and key **Please make sure that newly hired supervisors follow up on this with their employees.**
7. Proofread the e-mail address and the text you just keyed. Click the Send button .

Managing E-mail Message Attachments

Sending files attached to an e-mail message is a common way of exchanging data, documents, and other types of information. Although there are some file types that are not supported, due to the risk of viruses or other malicious code, the vast majority of files can be attached and sent with messages easily.

When you receive a message with a file attachment, you have several choices. You can preview the attachment while viewing the message, you can open the attachment directly, or you can save the attachment to a location on your computer.

**TIP**

Be very careful about opening attachments directly. You should only do so when the attachment not only has come from someone you trust, but also is something you were expecting.

Exercise 1-6 ATTACH A FILE TO AN E-MAIL MESSAGE

1. Click the New button  to begin a new message.
2. Key your own e-mail address in the To text box.
3. Key the subject **Fall Catalog Cover** in the Subject text box.
4. In the message body key **John**, and then hit  twice to insert a blank line and start a new paragraph.
5. Key **Please take a look at this picture and let me know if you think it would be a good choice for the cover of our Fall catalog.**
6. Click the Attach File button .
7. When the Insert File dialog box opens, click **Pictures** under the Favorite Links pane.
8. Locate the **Sample Pictures** folder in the right pane of the dialog box and double-click it to open it.
9. Locate the picture **Autumn Leaves** and double-click it to attach it to the message.
10. Right-click the attached file where it appears in the Attached text box. Note the ability to remove the attachment. This is useful if you inadvertently attach the wrong file. It is also useful when forwarding a message that contains an attachment, if you do not wish to send the attachment to the new recipient.
11. Proofread your address and the body of your message. Verify that the Attached text box contains **Autumn Leaves.jpg**.
12. Click the Send button .



NOTE

Messages that contain attachments are displayed in the Inbox with a paper-clip icon.



TIP

You can forward messages as attachments. Choose **Action, Forward as Attachment**, or press ++.



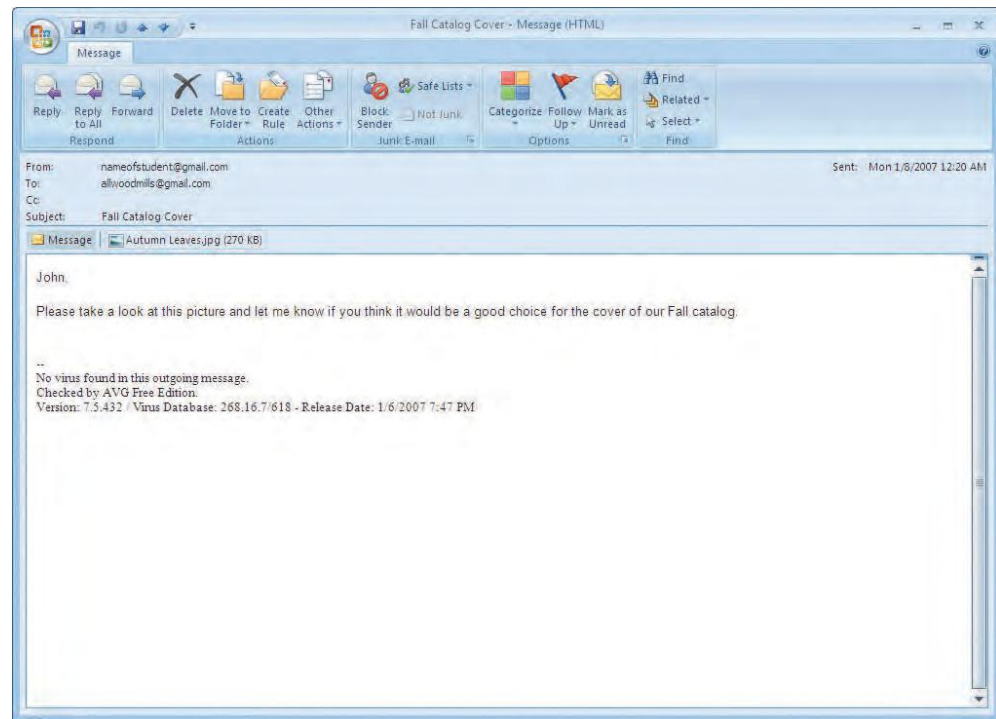
NOTE

If the message is still not in your Inbox after the Send/Receive process is complete, see your instructor for assistance.

Exercise 1-7 PREVIEW AND OPEN AN ATTACHMENT

1. Locate the “Fall Catalog Cover” message you sent to yourself in Exercise 1-6. If the message is not in the Inbox yet, click the Send/Receive button  on the Standard toolbar to force Outlook to check for new messages.
2. Double-click the message to open it.

Figure 1-7
E-mail message with
attachment



3. To preview the attachment, click the button above the message body labeled **Autumn Leaves.jpg**. The image will appear in place of the message body.
4. To return to the message, click the button labeled **Message**.
5. To open the attachment, double-click the **Autumn Leaves.jpg** button. This will open the image in Windows Photo Gallery (or other software, if your computer is so configured).
6. Close the Windows Photo Gallery window (or the window of whatever program opened to display the picture).
7. Right-click the **Autumn Leaves.jpg** button. Note the options that are available. Leave the message open for the next exercise.



TIP

Attachments can also be previewed, opened, and saved via the Reading pane, which appears by default to the right of the Inbox pane.

Exercise 1-8 SAVE AN ATTACHMENT

Saving an attachment to a specified location on your computer is usually the best approach. This ensures that you will be able to find the file later when you need it.

1. Right-click the **Autumn Leaves.jpg** button and choose **Save As**.
2. The Save Attachment dialog box defaults to your Documents folder. Key **Fall Cover.jpg** in the File name text box.
3. Click the **Save** button.
4. Close the e-mail message.

Viewing and Printing E-mail Messages

By default, Outlook places the *Reading pane* to the right of the Inbox to facilitate the reading of messages without opening them. However, some users prefer to have the Reading pane placed at the bottom of the window or turned off entirely. When the Reading pane is turned off, Outlook provides a method to see a short preview of each message within the Inbox pane itself.

Outlook also provides several ways of organizing the Inbox, and other mail folder, displays, including your choice of how to sort and/or group your messages. Additionally, if you would like to keep a hard copy of your e-mail communications, Outlook allows you to print either individual messages or a listing of the messages contained in the current mail folder.



NOTE

Other than the Inbox, other mail folders include Deleted Items, Drafts, Junk E-mail, Outbox, and Sent Items. Later in the text you will learn how to create your own mail folders.

Exercise 1-9 CONTROL THE READING PANE

You can resize, move, or hide the Reading pane.

1. If the Reading pane is not currently displayed, click **View** and hover over **Reading Pane**. This is where you can control whether or not the Reading pane is visible and its position when visible.



NOTE

The body text of e-mail messages in the Reading pane will automatically wrap to accommodate the size of the pane.

2. Select **Right**.
3. You can resize the Reading pane to take up more or less room in the Outlook window. This is useful for allowing you to see more columns in the Inbox or for easier reading of message text in the Reading pane.



4. To resize the Reading pane, place your mouse pointer over the left border, between the Inbox and the Reading pane. When the pointer changes to left and right arrows , drag the border to the right until the Reading pane is approximately half its original width. Release the mouse when you have the size you want.
5. To move the Reading pane to the bottom, click **View** and hover over **Reading Pane**. Click **Bottom**.



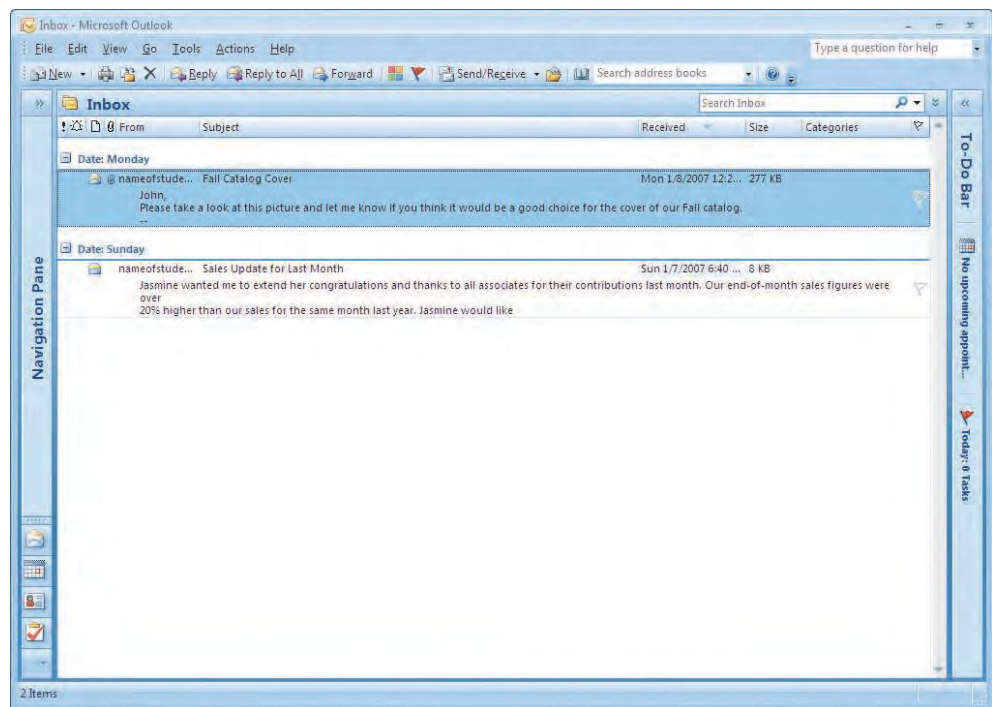
6. You can also resize the Reading pane to be taller or shorter when displayed at the bottom, which allows you to control the number of messages you can see in your Inbox.
7. To resize the Reading pane, place your mouse pointer over the top border, between the Inbox and the Reading pane. When the pointer changes to up and down arrows , drag the border down until the Reading pane is about half its original height. You may notice that the current message displayed in the pane has a vertical scrollbar for scrolling through the message text.
8. To hide the Reading pane, click **View** and hover over **Reading Pane**. Click **Off**. Leave the Reading Pane off for the following exercises.

Exercise 1-10 USE AUTOPREVIEW

When the Reading pane is turned off, *AutoPreview* allows you to see the beginning of each message within the Inbox itself.

1. To turn AutoPreview on, click **View** and click **AutoPreview**.
2. Note that each message in your Inbox displays a few lines from the beginning of the message. To see the remainder of the message, it is necessary to either open the e-mail (by double-clicking) or turn the Reading pane back on.

Figure 1-8
Inbox with
AutoPreview turned
on and Reading
pane off



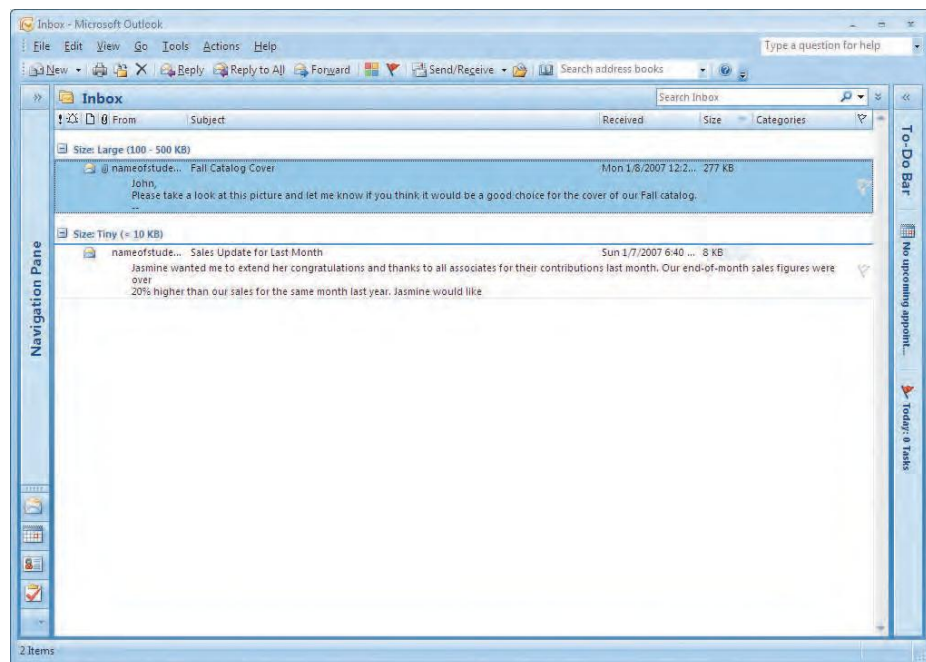
3. To turn AutoPreview off, click **View** and click **AutoPreview**.

Exercise 1-11 SORT E-MAIL MESSAGES

Outlook's default settings are to sort e-mail by date with the most recent messages at the top of the Inbox (or other mail folder) and to group messages together based on the time frame during which they were received. You can choose to modify these default settings in several ways.

1. Hover over each of the column headings at the top of the Inbox and wait for a moment over each to see the ScreenTip that describes the sort that will be performed if you click that heading. Notice that the **Received** column (assuming default settings) displays a down arrow. This indicates that the current sort is by received date and is from most recent to oldest. This is known as a descending sort.
2. Click the **Received** heading one time. This changes the sort so that messages are sorted from oldest at the top to newest at the bottom. This is known as an ascending sort. Notice also that messages are grouped by the time frame during which they were received.
3. Click the minus sign  next to the topmost group (most likely for oldest messages). This button collapses a group, allowing you more room to focus on other messages.
4. Click the plus sign  next to the topmost group to expand the group again.
5. Click the **Size** column heading one time to sort the messages from largest to smallest, or in descending order. Messages with attachments will tend to appear at the top due to the size of the attached file. Note that the grouping categories have changed to groups that reflect the size range of the messages in the group.

Figure 1-9
Inbox with messages
sorted and grouped
by size



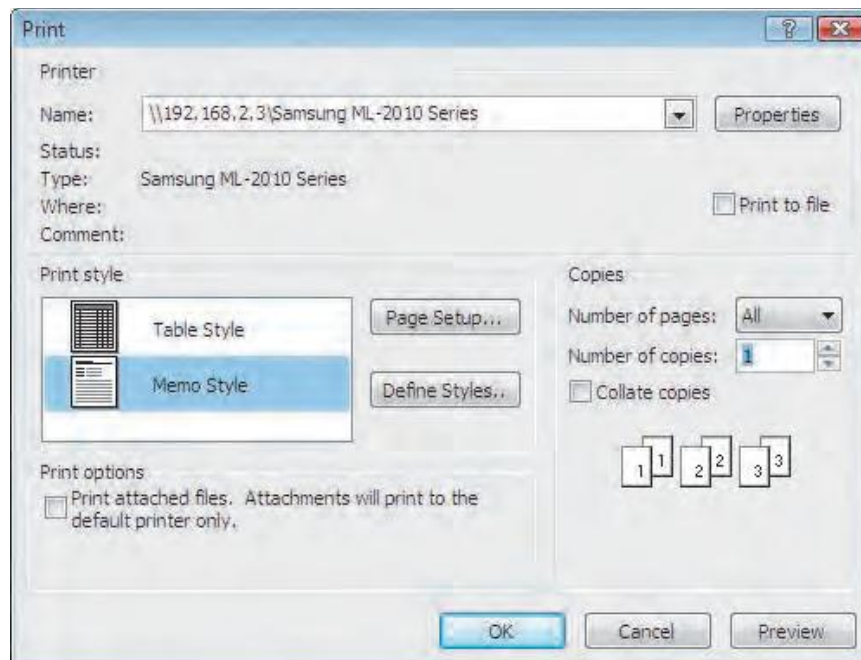
6. If you'd rather not see groups for a sort (regardless of the sort), you can remove the sorting option. Click **View** and hover over **Arrange By**. Click **Show in Groups** to deselect the option.
7. Sorting options are also available from the shortcut menu. Right-click any column header and hover over **Arrange By**. Click **Show in Groups** to restore the grouping feature.
8. You can also expand or collapse all groups at once. Click **View** and hover over **Expand/Collapse Groups**. Click **Collapse All Groups**.
9. To restore the groups to their default expanded state, click **View** and hover over **Expand/Collapse Groups**. Click **Expand All Groups**.
10. Click the **Received** column header once to restore the default sort. Verify that messages are being sorted from most recent at the top to oldest at the bottom.
11. To restore the other settings you've changed, click **View** and click **AutoPreview** if it is turned on. Click **View** again and hover over **Reading Pane**. Click **Right** to restore the Reading pane to its default position. You may resize the Reading pane to whatever size is comfortable for you.

Exercise 1-12 PRINT E-MAIL MESSAGES AND CLOSE OUTLOOK

You can print either the list of messages in your Inbox as they are displayed on the screen or the content of individual messages.

1. Click the first message in your Inbox to select it.
2. Click the **File** menu and select **Print**.

Figure 1-10
Outlook's Print
dialog box



**NOTE**

If multiple e-mails are selected and printed in Memo Style, each will print on its own page or pages, depending on length.



3. Note that there are two print styles available for e-mail messages: Table Style and Memo Style. Note also that for messages with attachments you can select Print attached files. However, attachments will only print to the default printer.
4. Click the **Preview** button to see what Memo Style looks like. Note that Memo Style prints the contents of the currently selected e-mail or e-mails.
5. Click the close button  to leave print preview.
6. Click the **File** menu and select **Print**.
7. Change the print style to Table Style. Click the **Preview** button. Note that Table Style prints the current Inbox view.
8. Click the close button  to leave print preview.
9. Open the currently selected message in the Inbox by double-clicking it. Printing from an open message requires the use of the Office Button , which makes available many of the functions normally found in the File menu.
10. Click the Office Button  in the open message and hover over **Print**.

**TIP**

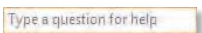
Clicking the Print button  while viewing the Inbox assumes that you want to print the currently selected message to your default printer in Memo Style. This is the same thing as clicking the Office Button and choosing Quick Print from the Print menu while viewing a message.

11. Click the first option, **Print**. Note that while in an open message your only available print style is Memo Style.
12. Click **Cancel** to return to the open message. Close the message form by clicking the close button .
13. Click the close button  to close Outlook. Outlook will perform a final Send/Receive operation before closing.

Using Online Help

Online Help is available in Outlook to assist you with various components of the program and problems you may run into. In this exercise you use Online Help to learn more about the file attachments Outlook blocks.

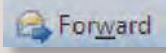
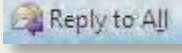
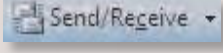
USE HELP TO LEARN ABOUT FILE ATTACHMENT LIMITATIONS

1. Start Outlook if necessary.
2. Locate the Search box  and key **file attachments** and press **[Enter]**.
3. Locate and click the link **Blocked attachments in Outlook**.
4. Review the information, paying close attention to the list of blocked file types. Also make note of the procedure for sending one of these files by changing the file extension. This technique can be very useful.
5. Close the Outlook Help window when you are finished.

Lesson 1 Summary

- Start Outlook by clicking the Start button  and pointing to **All Programs**. Click **Microsoft Office** and then click **Microsoft Office Outlook 2007**.
- Use the Navigation pane to navigate among Outlook's components.
- When the Navigation pane is minimized to the Navigation bar using the , you can show the mail folders by clicking the area labeled Navigation Pane.
- To send an e-mail message, you need the recipient's address, which consists of the user's name, the @ symbol, and their domain name.
- Open the new message form by clicking the New button  while viewing the Inbox.
- Key the recipient's address in the **To** text box. Recipients listed in the Cc text box will also receive the message and their addresses will be displayed in the message header. Multiple addresses should be separated by a semicolon.
- Turn on the Bcc text box by clicking the **Options** tab above the Ribbon and clicking the **Show Bcc** option. Addresses in the Bcc text box will not appear in the header of the message when it is received.
- To resend an e-mail message, open the message from the **Sent Items** folder. Click **Other Actions** on the Ribbon and choose **Resend This Message**.
- You can respond to e-mail messages by using the Reply, Reply to All, and Forward buttons either from the Inbox or from within an open message form.
- Reply sends a response to the original sender of the message.
- Reply to All sends a response to the original sender of the message and all original recipients.
- Forward sends the message to a new recipient or recipients you choose.
- Attach files to e-mail messages by clicking the Attach File button  on the Ribbon while in the message form.
- Preview attachments to received e-mails by clicking the button with the name of the attachment on it in either the open message form or the Reading pane.
- Open attachments to received e-mails by double-clicking the button with the name of the attachment on it in either the open message form or the Reading pane.
- Save attachments to received e-mails by right-clicking the button with the name of the attachment on it in either the open message form or the Reading pane. Choose **Save As** from the shortcut menu.
- You can position the Reading pane at the right or bottom of the Outlook window. It can also be closed. These options are available from the View menu. When the Reading pane is visible, you can also resize it with the mouse.

- AutoPreview, which is available from the View menu, displays the first few lines of each e-mail directly in the Inbox. This is sometimes used when the Reading pane is turned off.
- Message sorting in the Inbox is controlled by clicking the column headings. Grouping of messages can be turned on or off from the View menu.
- Printing with Table Style prints the list of messages in the Inbox.
- Printing with Memo Style prints the contents of the selected e-mail message.

LESSON 1		Command Summary	
Feature	Button	Task Path	Keyboard
Attach File			
AutoPreview		View, AutoPreview	
Forward as Attachment		Action, Forward as Attachment	Ctrl + Alt + F
Forward		Action, Forward	Ctrl + F
Navigation pane		View, Navigation Pane	Alt + F1
New Message		File, New, Mail Message	Ctrl + Shift + M
Print		File, Print	Ctrl + P
Reading pane		View, Reading Pane	
Reply to All		Action, Reply to All	Ctrl + Shift + R
Reply		Action, Reply	Ctrl + R
Send			Ctrl + Enter
Send/Receive		Tools, Send/Receive, Send/Receive All	F9

Concepts Review

True/False Questions

Each of the following statements is either true or false. Indicate your choice by circling T or F.

- T F 1. There is more than one possible way to start Outlook.
- T F 2. The Reading pane is the primary navigational tool in Outlook.
- T F 3. Addresses in the Cc text box do not appear in received messages.
- T F 4. Multiple addresses should be separated with a semicolon.
- T F 5. A message must be open to be resent.
- T F 6. It is wise to use Reply to All cautiously.
- T F 7. Attachments cannot be previewed from the Reading pane.
- T F 8. Table Style is used to print the contents of a single message.

Short Answer Questions

Write the correct answer in the space provided.

1. Describe some of the possible methods for starting Outlook.

2. How do you display the folder list when the Navigation pane has been minimized to the Navigation bar?

3. What are the two keyboard shortcuts for starting a new mail message and when are they used?

4. How do you display the Bcc text box if it is not displayed?

5. What are some of the indications that a new message has been received?

6. Why should you be careful in using Reply to All?

7. What does the Attach File button look like?

8. What are your options for displaying the Reading pane?

Critical Thinking

Answer these questions on a separate page. There are no right or wrong answers. Support your answers with examples from your own experience, if possible.

1. Why might you want to think carefully before sending very large file attachments?
2. When might you want to turn off the Reading pane and the AutoPreview feature?

Skills Review

Exercise 1-13

Start Outlook. Create and send an e-mail message.



1. Start Outlook by following these steps:
 - a. Click the Start button  on the Windows taskbar.
 - b. Hover over **All Programs**.
 - c. Click **Microsoft Office** and then click **Microsoft Office Outlook 2007**.
2. Start a new e-mail message by following these steps:
 - a. Verify that you are viewing the Inbox. If not, click the **Inbox** tab on the Navigation pane if the pane is minimized. If the Navigation pane is not minimized, click the **Inbox** folder in the folder list.
 - b. Click the New button  on the Standard toolbar.
3. Address and enter the message by following these steps:
 - a. In the **To** text box enter your instructor's e-mail address.
 - b. In the **Cc** text box enter your own e-mail address.
 - c. In the Subject text box key **Open Enrollment Reminder**.
 - d. For the body of the message, key the text shown in Figure 1-11.



Figure 1-11

Maria would like to remind all employees that the open enrollment period for our 401k plan ends on the last day of the month. All eligible employees (those with one full year of service) are encouraged to consider participating in this plan. Keep in mind that the company matches your contribution to the plan on a one-for-one basis up to 5% of your yearly compensation.



4. Proofread your addresses and message. Send the message by clicking the Send button .

Exercise 1-14

Forward an e-mail message; add an attachment to an e-mail message.

1. Verify that you are viewing the Inbox. If not, click either the **Inbox** tab or folder on the Navigation pane.
2. Open the message with the subject “Fall Catalog Cover” by double-clicking it.



NOTE

This exercise makes use of an e-mail you created in Exercise 1-6. If you do not have this message (subject line “Fall Catalog Cover”) in your Inbox, please complete Exercise 1-6.



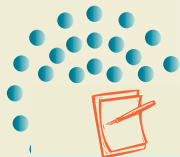
NOTE

If the Bcc text box is not visible, follow the instructions in Exercise 1-3 to display it.

3. Begin forwarding the message by following these steps:
 - a. Click the Forward button .
 - b. Key your instructor’s e-mail address in the **To** text box.
 - c. Key your e-mail address in the **Bcc** text box.
 - d. In the body of the message key **That picture looks great. I’d like to suggest this picture for our spring cover.**
4. Add an attachment to the message by following these steps:
 - a. Click the Attach File button .
 - b. When the Insert File dialog box opens, click **Pictures** under the Favorite Links pane.
 - c. Locate the **Sample Pictures** folder in the right pane of the dialog box and double-click it to open it.
 - d. Locate the picture **Creek** and double-click it to attach it to the message.
5. Remove the original attachment by right-clicking the file **Autumn Leaves** where it appears in the Attached text box. Choose **Remove**.
6. Proofread your address and message. Send the message by clicking the Send button .

Exercise 1-15

Preview and save a message attachment.



NOTE

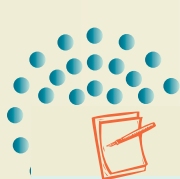
This exercise makes use of an e-mail you created in Exercise 1-14. If you do not have this message (subject line "FW: Fall Catalog Cover") in your Inbox, please complete Exercise 1-14.

1. Verify that you are viewing the Inbox. If not, click either the **Inbox** tab or folder on the Navigation pane.
2. Open the message with the subject "FW: Fall Catalog Cover" by double-clicking it.
3. Preview the attachment by clicking the button labeled **Creek.jpg**.
4. Return to the message by clicking the button labeled **Message**.
5. Save the message attachment by following these steps:
 - a. Right-click the button labeled **Creek.jpg**.
 - b. Choose **Save As**.
 - c. Click **Documents** under Favorite Links to be sure you are in your Documents folder.
 - d. In the File name text box key **Spring Cover.jpg**.
 - e. Click **Save**.
6. Close the open e-mail form by clicking the close button .



Exercise 1-16

Print the body of an e-mail message in Memo Style with attachment; print the contents of the Inbox in Table Style.



NOTE

This exercise makes use of an e-mail you created in Exercise 1-14. If you do not have this message (subject line "FW: Fall Catalog Cover") in your Inbox, please complete Exercise 1-14.



1. Verify that you are viewing the Inbox. If not, click either the **Inbox** tab or folder on the Navigation pane.
2. Open the message with the subject "FW: Fall Catalog Cover" by double-clicking it.
3. Print the e-mail message by following these steps:
 - a. Click the Office Button  in the open message and hover over **Print**.
 - b. Click the first option, **Print**.
 - c. Verify your printer selection and click **OK** to print the message.
 - d. Close the message form by clicking the close button .
4. While viewing the Inbox, print a listing of the messages it contains by following these steps:
 - a. Click the **File** menu.
 - b. Select **Print**.
 - c. In the section labeled Print style, choose **Table Style**.
 - d. Verify your printer selection and click **OK** to print the Inbox listing.

Lesson Applications

Exercise 1-17

Create and send an e-mail message; use Reply to All to respond to an e-mail message.

1. Open Outlook and display the Inbox if it is not already displayed.
2. Create a new e-mail message. Address the message to your instructor and send a blind carbon copy to yourself.
3. Key the subject of the message as **Manufacturing Error Rate Report Request**.
4. For the body of the message, key the text in Figure 1-12.

Figure 1-12

All production supervisors are reminded that their error rate reports for last quarter are due by the end of next week. Please submit your reports via e-mail to Paul Epstein before the end of the day next Friday. Paul will consolidate the individual reports and prepare the company-wide statistics by the end of the month.



REVIEW

You can use the **[F9]** key to force Outlook to perform a send/receive.

5. Proofread your addresses and the message and send the e-mail.
6. Force Outlook to do a send/receive. You may need to do this more than once before your copy of the message appears in your Inbox.
7. Select the **Manufacturing Error Rate Report Request** e-mail and click the Reply to All button.
8. In the body of the message key **The error rate report for all departments will not be available online until midday Tuesday due to database maintenance.**
9. Send the message.

Exercise 1-18

Create an e-mail message; add an attachment; save an attachment; print a message.

1. Open Outlook and display the Inbox if it is not already displayed.
2. Create a new e-mail message. Address the message to your instructor and send a carbon copy to yourself.
3. Key the subject line **Spring Cover Concerns**.
4. For the body of the message key the text in Figure 1-13.

Figure 1-13

It has come to my attention that the picture originally suggested for the cover of the spring catalog (Creek.jpg) is very similar to one we used last year. I'd like to recommend the attached image as a suitable replacement. Please respond with any questions or comments.

5. Attach the file **Forest Flowers** to the message. You will find this message in the Sample Pictures folder in the Pictures folder on your computer.
6. Send the message.
7. When the Spring Cover Concerns message arrives in your Inbox, open it.
8. Save the attachment to your Documents folder as **Alternate Spring Cover.jpg** (be sure to type the jpg extension).
9. Print the e-mail in Memo Style. Do not print the attachment.
10. Close the message.

Exercise 1-19

Manipulate the Reading pane, switch mail folders; sort mail folders, print the contents of mail folders.

1. Close the Reading pane so you can see all of the columns in the Inbox.
2. Sort the Inbox messages by size in descending order (with the largest messages first).
3. Print the contents of the Inbox using Table Style.
4. Restore the sort of the Inbox to descending by date received. This is the default sort and puts the most recent messages at the top.
5. Restore the Reading pane to its previous position and/or size.
6. If the Navigation pane is minimized to a bar, click the area labeled **Sent Items** to display the Sent Items folder. If the Navigation pane is not minimized, you can click this folder directly in the Mail Folders list.
7. Close the Reading pane so you can see all of the columns in the Sent Items folder.
8. Sort the Sent Items folder in ascending order by size. This puts the smallest messages at the top.



TIP

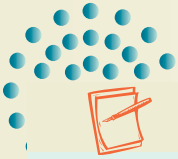
Clicking a column header a second time reverses the order of the sort.

9. Print the Sent Items folder using Table Style.
10. Restore the sort of the Sent Items folder to descending by date received. This is the default sort and puts the most recent messages at the top.

11. Restore the Reading pane to its previous position and/or size.
12. Return to the Inbox.

Exercise 1-20 ♦ Challenge Yourself

Send an e-mail message to multiple recipients; attach multiple attachments, print e-mail message with attachments to default printer.



NOTE

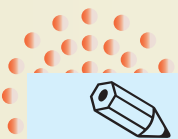
This exercise requires the files **Fall Cover.jpg** and **Alternate Spring Cover.jpg**, which were saved during Exercises 1-8 and 1-18, respectively. Please complete those exercises before doing this one. Additionally, this exercise requires your lab printer to be your default printer. See your instructor if you need assistance in configuring this.

1. Open Outlook and display the Inbox if it is not already displayed.
2. Create a new e-mail message. Address the message to your instructor, yourself, and one classmate. All three addresses should be in the To text box.
3. Key the subject **Final Opinions on Catalog Covers**.
4. Key the message body text from Figure 1-14.

Figure 1-14

Rob and John have tentatively decided to go with the two attached images for the covers of our fall and spring catalogs. However, they wanted to give everyone one last chance to give input. If you have any concerns or suggestions regarding the cover images, please respond by the end of the day. Otherwise, the art will go to the printers tomorrow morning for eventual inclusion in the respective catalogs.

5. Attach the files **Fall Cover.jpg** and **Alternate Spring Cover.jpg** that are saved in your Documents folder.



TIP

When the Print Pictures window appears, simply click the **Print** button to print each picture as a full size page. You will need to do this once for each picture.

6. Send the e-mail.
7. When the e-mail arrives in your Inbox, open it and print it to your default printer, being sure to check the checkbox to include the message attachments.
8. Close the message form.

On Your Own

In these exercises you work on your own, as you would in a real-life work environment. Use the skills you've learned to accomplish the task—and be creative.

Exercise 1-21

Open Outlook and experiment with the settings for the Navigation pane, the Reading pane, the AutoPreview feature, and the sorting of messages. Write

an e-mail to your instructor that explains your preferences for working with these settings in Outlook. Be sure to explain your reasoning. Return the settings to their defaults when you are done.

Exercise 1-22

Create a new e-mail message. In the body of this message key the True/False and Short Answer questions from the end of the lesson and your answers to them. Send this message to your instructor with an appropriate subject line. To print the message, open it from your Sent Items folder and print it in Memo Style for your own reference.

Exercise 1-23

Ask a friend who has access to a digital camera, or other source of digital images, to send you an e-mail with an attached image file. When you receive the e-mail, preview the attachment. If you like, save the attachment to your Pictures folder. Be sure to reply to your friend's e-mail to let them know you received it and how you liked the picture.

Lesson 2

Contact Management

OBJECTIVES

MCAS OBJECTIVES

In this lesson:

OL07 4.1.1
OL07 4.1.2
OL07 4.1.3
OL07 4.1.4
OL07 4.1.5
OL07 4.2.1
OL07 4.2.2
OL07 4.3
OL07 4.4.1
OL07 4.4.2

After completing this lesson, you will be able to:

1. Create and modify contacts.
2. Edit and use an electronic business card.
3. Create and modify distribution lists.
4. Create a secondary address book.
5. View and print contacts.

Estimated Time: 1½ hours

Outlook's powerful contact management component goes far beyond simply tracking e-mail addresses, mailing addresses, and phone and fax numbers. In addition to those important pieces of information, Outlook allows you to record just about anything else about a contact you might wish to keep track of.

Outlook also gives you an easy way to exchange contact information with others and create and manage customized lists of contacts for sending e-mail to groups. It also gives you extensive control over how you store and view your contacts.

Creating and Modifying Contacts

Contacts in Outlook are created by filling in a form with fields for the information that describes the contact. You can create new contacts by first opening a blank form, or you can create new contacts based on the company information for an existing contact. You can also begin the process of creating a contact from the header information of an e-mail message.

Once you have created a contact, it is easy to modify or add to the information when updates are necessary. Additionally, contacts that are no longer valid or needed can easily be removed from your address book.

Exercise 2-1 CREATE A NEW CONTACT

There are several ways to begin the process of creating a contact in Outlook. You can:

- Press **Ctrl+N** while viewing the contacts.
- Press **Ctrl+Shift+C** while viewing any part of Outlook.
- Click the New button while viewing contacts.
- Choose Contact from the drop-down list of the New button.



1. Minimize the Navigation pane, if it is not already minimized, by clicking the chevrons  at the top of the pane. Working with the minimized Navigation bar leaves more room available to view your contacts.
2. Switch to Outlook's Contacts component by clicking the Contacts button  on the Navigation bar.
3. Click the New button  to open a new contact form.

Figure 2-1
The New Contact form

**TIP**

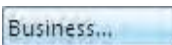
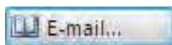
You can use **Tab** to move to the next text box and **Shift+Tab** to move to the previous text box. Alternatively, you can also click in any field you wish.

**TIP**

It's a good idea to be consistent with your filing approach for contacts. Outlook will allow you to choose different methods for different contacts, but this can lead to difficulty when searching for information.

**NOTE**

If you accidentally click the Add Contact Picture button, just close the dialog box that opens to return to the contact form.



4. In the **Full Name** text box, key **your instructor's full name**.
5. Press **Tab** one time to move to the Company text box. Key **your school's name**.
6. Press **Tab** one time to move to the Job title text box. Key **your instructor's title** (i.e. Instructor, Professor, Teaching Assistant, etc.).
7. Note that the File as text box already contains your instructor's name with the last name first. This standard method of filing contacts makes finding a particular person much easier. However, you do have other options.
8. Click the drop-down arrow  to the right of the File as text box. Note the other choices you have for filing this contact. Click the drop-down arrow  again to close the list without making any changes.
9. Press **Tab** one time. Note that the blinking insertion cursor is not in the next text box, E-mail. Instead there should be an outline around the Add Contact Picture button . This button can be used to associate a picture with a contact. Do not click this button at this time.
10. At this point, using **Tab** to move from field to field can be awkward. Press **Tab** three times to move to the E-mail text box. Note that the first two key presses moved to the E-mail button  and the drop-down arrow  beside it. You'll explore the function of these buttons later in this lesson.
11. Verify that the blinking insertion cursor is in the E-mail text box. Key **your instructor's e-mail address**.
12. Press **Tab**. Outlook fills in the Display as text box with your instructor's name followed, in parentheses, by the e-mail address you just entered.
13. Use your mouse to click in the text box to the left of the Business button  in the Phone numbers section of the form. When keying a telephone number you only have to key the numbers. Key your school's telephone number, including the area code, like this: **5555551212**.

14. Press **[Tab]** one time to move out of the Business text box. Note that Outlook automatically formats the telephone number with parentheses around the area code and a hyphen between the exchange and the rest of the number after the information is entered.

Figure 2-2
Partially completed
contact form

15. Use your mouse to click in the text box in the Addresses section of the form. Enter the address for a contact in much the same way you would address an envelope, each part of the address appearing on its own line.



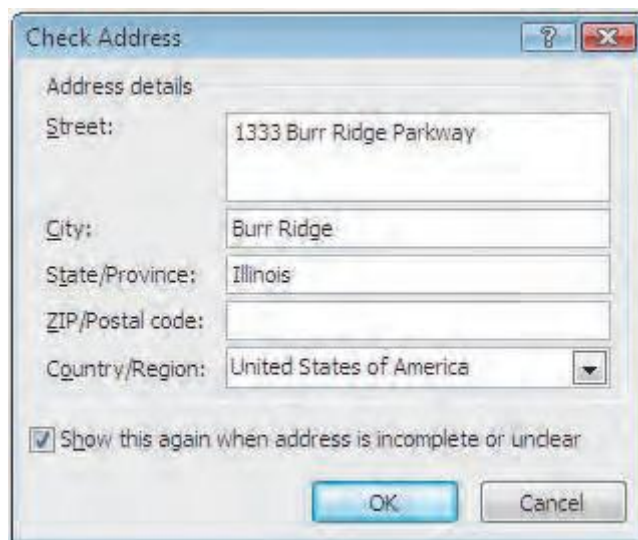
TIP

You can open a dialog box to enter information by clicking the appropriate button (Full Name, E-mail, Business, etc.) instead of keying information in the contact form's text boxes.

16. Key the **address number and street name** for your school and press **[Enter]**.
17. Key the city and state/province your school is in using the format: **City, State/Province**. Do not key the Zip or postal code.

18. Press **Tab** to move out of the address field. Note that a Check Address dialog box appears with the insertion cursor in the Zip/Postal code field. Outlook displays a dialog box similar to this whenever the information you enter is unclear or incomplete.

Figure 2-3
Check Address
dialog box



The 'Check Address' dialog box is shown with the following details:

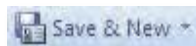
- Address details:**
 - Street: 1333 Burr Ridge Parkway
 - City: Burr Ridge
 - State/Province: Illinois
 - ZIP/Postal code: (empty)
 - Country/Region: United States of America
- ☒ Show this again when address is incomplete or unclear
- Buttons: OK, Cancel



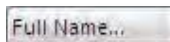
19. Key your **Zip or postal code** and click the OK button  to return to the contact form. Leave the contact form open for the next exercise.

Exercise 2-2 **SAVE A CONTACT AND CREATE A NEW CONTACT FROM THE SAME COMPANY**

After entering information for a new contact, you can save it and close the form, save it and open a new blank form, or save it and begin a new contact for another person in the same company.

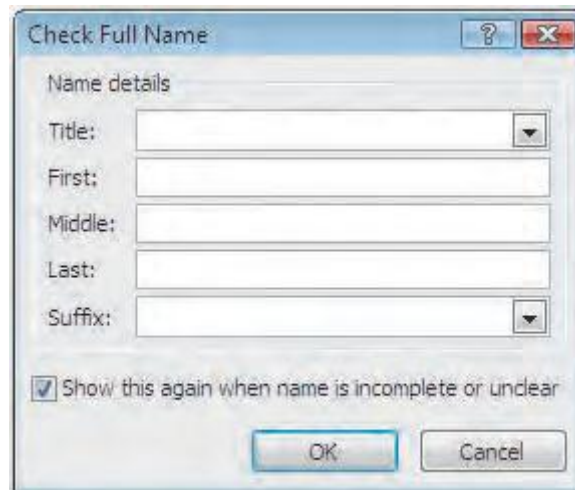


1. To begin the process of creating a new contact for a person from the same company as your current contact, click the drop-down arrow on the Save & New button on the Ribbon . Select **New Contact from Same Company**. This opens a new contact form with some of the fields already filled in with the company information from the previous contact.



2. Click the Full Name button  to open the Check Full Name dialog box. You can use this dialog box to enter name information if you prefer. Outlook will also display this box whenever the information you enter in the Full Name text box is incomplete or unclear.

Figure 2-4
Check Full Name
dialog box



The 'Check Full Name' dialog box is shown. It has a title bar with a question mark and a close button. The 'Name details' section contains five text boxes: 'Title:', 'First:', 'Middle:', 'Last:', and 'Suffix:'. The 'Title' and 'Suffix' boxes have dropdown arrows on their right sides. Below these boxes is a checkbox labeled 'Show this again when name is incomplete or unclear' which is checked. At the bottom are 'OK' and 'Cancel' buttons.



NOTE

Your instructor will provide you with the necessary information for this contact.

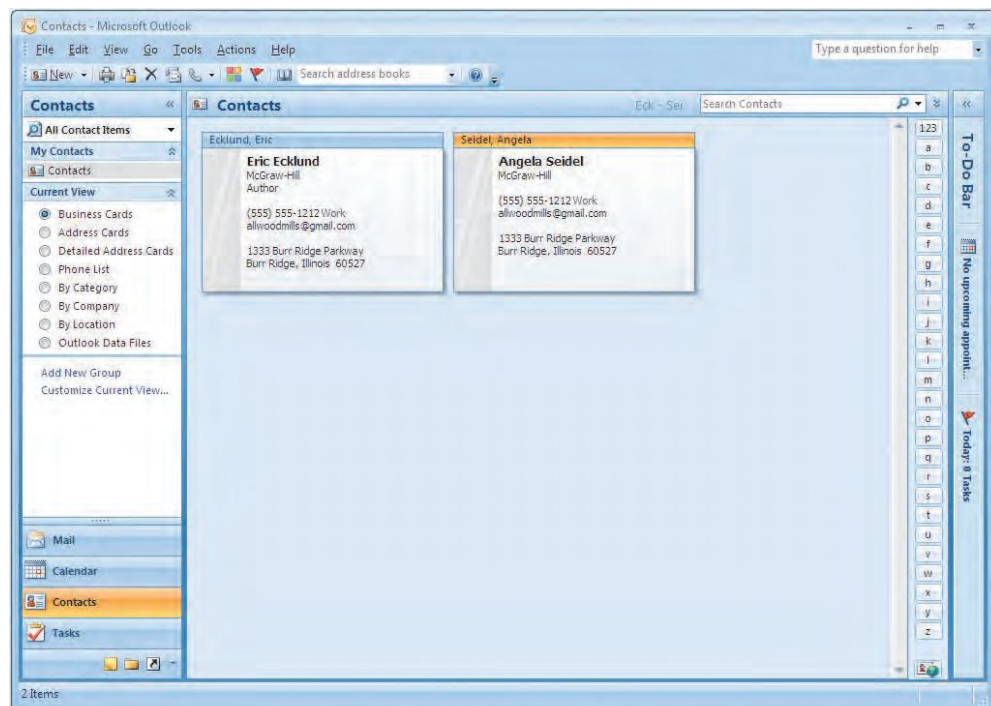


NOTE

Your list of contacts may be different from those displayed in the figures.

- Using information from your instructor, key information in at least the First and Last text boxes and click the OK button .
- Key an e-mail address in the **E-mail** text box.
- Click the Save & Close button  to save the new contact and close the form. Click the Save & Close button again  to close the form for your original contact. You should now be viewing the contacts screen, which is displaying the business cards for the contacts you have created.

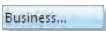
Figure 2-5
Microsoft Outlook
contacts displayed as
business cards



Exercise 2-3 CREATE A CONTACT FROM A MESSAGE HEADER

Creating contacts from message headers is a good way to keep your list of contacts up to date as you receive messages from people you may want to communicate with later. In this exercise you'll use this technique to begin creating a contact for yourself from one of your sent messages.



1. Click the Mail button  to return to the Inbox.
2. If the Navigation pane is not minimized, click the **Sent Items** folder. If the minimized Navigation bar is displayed, click the **Sent Items** tab.
3. Double-click the first message in Sent Items to open it.
4. Locate your name and/or e-mail address in the From field in the message header.
5. Right-click your address and select **Add to Outlook Contacts**.
6. Click in the text box next to the Home button  in the Phone numbers section. Enter your home phone number with area code (feel free to use a made-up number).
7. Click in the **Addresses** text box and enter the address of your school, as you did for your instructor. Uncheck the checkbox labeled **This is the mailing address**.
8. Click the drop-down arrow  next to the Business button  and select **Home**.

Home...



TIP

The drop-down buttons next to the E-mail, Phone, and Address buttons on the contact form allow you to designate up to three different e-mail and mailing addresses and up to 19 different phone numbers for each contact.

9. Enter your home address (feel free to use a made-up address) in the text box. Click the checkbox labeled **This is the mailing address** to indicate that this is the mailing address for this contact.

10. Click the Save & Close button . You will open and edit this new contact in the next exercise. Close the e-mail message.

11. Return to contacts by clicking the Contacts button .

Exercise 2-4 MODIFY AN EXISTING CONTACT

You can edit contacts after creation to add or change information. In this exercise you will edit your own contact and explore some of the many pieces of information that can be associated with a contact.

1. Double-click the business card for your contact to reopen the contact form.
2. So far you have only worked with information in the General category. To switch to the Details category for your contact, click the Details button  in the **Show** group on the Ribbon.

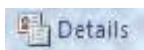


Figure 2-6
Details fields for a
contact

Eric Ecklund - Contact

Contact Insert Format Text

Save & New Save & Close Send Delete Actions

General Certificates Details All Fields Activities Show

E-mail Meeting Call Communicate

Picture Categorize Follow Up Options Spelling Proofing

Department: Office: Profession: Manager's name: Assistant's name:

Nickname: Spouse/Partner: Title: Birthday: None Suffix: Anniversary: None

Internet Free-Busy Address:

3. Click in the Birthday text box and replace None with your birth date. Use the format **MM/DD/YY**. You can also use the drop-down arrow to select your birth date from a calendar, but keying it is typically much faster.



4. Click the Activities button  in the **Show** group on the Ribbon. This view displays other Outlook items, such as appointments and e-mails, that are related to the current contact. You do not enter these here; Outlook makes the connection automatically. Because this is a relatively new contact, it's likely that nothing is displayed here as of yet.



5. Click the Certificates button  in the **Show** group on the Ribbon. Here you can import certificates, which are used to digitally encrypt e-mail messages to recipients. Certificates will be addressed further in Lesson 5.



6. Click the All Fields button  in the **Show** group on the Ribbon. As the name implies, this gives you access to all available fields for a contact, including custom fields you can create.

7. Click the Save & Close button  to return to viewing contacts.

Editing and Using Electronic Business Cards

Electronic business cards are more than just the default way to view your contacts in Outlook. They can also be edited to display information in a format you prefer. Business cards can also be sent to and received from other Outlook 2007 users to make the sharing of contact information easy. In these cases, only the information you have chosen to display on the business card is actually available to the recipient.

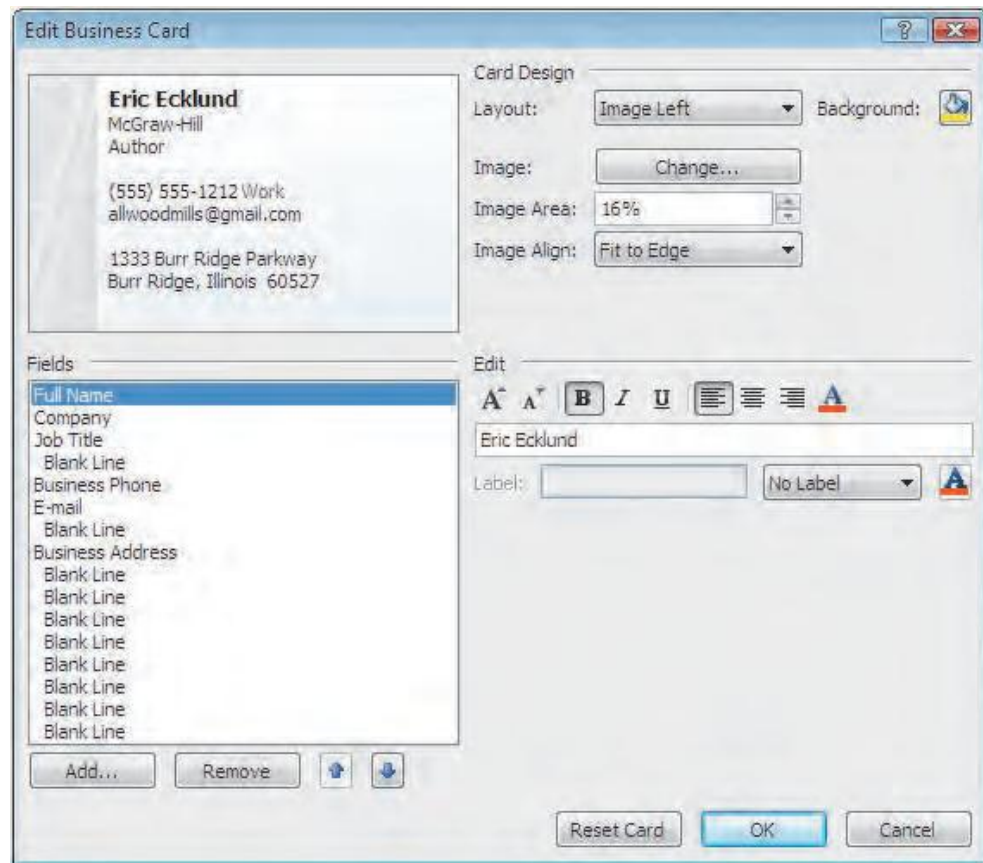
In cases where you want to exchange full contact information with others, you can send or receive in either a special Outlook-compatible format or as a *vCard*, which can be understood by most e-mail applications.

Exercise 2-5 EDIT A BUSINESS CARD

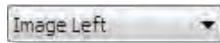
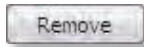
1. Double-click the business card you created for your instructor to open it.
2. Click the Business Card button  to open the Edit Business Card dialog box.

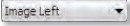


Figure 2-7
Edit Business Card
dialog box



3. This dialog box allows you to make many changes to the current business card, including which fields to display, the graphics on the card and their position, and many other elements. For this exercise, you are going to make a few minor changes to the information displayed and the card's overall appearance.



4. In the Fields area, select Business Address and click the Remove button .
5. In the Card Design area, set the Layout to Image Left if it is not already Image Left by clicking the button labeled Image Left .
6. In the Edit area, add the italics effect to the instructor's name by selecting the Instructor's name and clicking the italics button .
7. Click the OK button  to close the dialog box and return to the contact form.
8. Click the Save & Close button  to return to viewing your contacts.

Exercise 2-6 SEND A BUSINESS CARD

1. Right-click the business card for your instructor that you just edited. Select **Send as Business Card**.
2. Before addressing and sending the e-mail, double-click the link in the Attached text box to see what the recipient will receive. Note that the address will not be included with this contact, since you removed it from the business card. Close the contact form.
3. Key your instructor's e-mail address in the **To** text box. Key your own e-mail address in the **Cc** text box.
4. Key **Instructor's Business Card** in the Subject text box.
5. Click the Send button  to send the e-mail.

Exercise 2-7 ADD A CONTACT FROM A BUSINESS CARD OR CONTACT RECORD

1. Click the Mail button  to go to the Inbox. If the message sent in the last exercise has not yet arrived, try pressing **[F9]** to force a send/receive operation.
2. When the message arrives, double-click it to open it.
3. The most common way to add a contact from a business card is to right-click the business card itself. Right-click the card and select **Add to Outlook Contacts**. This will open the contact form. Note that the address for the contact is not included since it does not appear on the card.

4. Close the contact form without saving changes, since this is a contact you already have.
5. Another method for adding the contact is frequently used when the recipient is not running Outlook. Right-click the attachment button labeled with the name of the contact. Select **Add to Contacts**.
6. Since this is still a contact you already have, close this contact form without saving changes. Close the message form as well.
7. Return to Outlook's Contacts component by clicking the Contacts button .

Exercise 2-8 SEND A FULL CONTACT

If you want to exchange all of the information recorded for a contact, you typically need to move beyond business cards. In these cases you want to send a full contact, and there are two different formats to use; one for Outlook users and one known as Internet format for most other e-mail clients. Only use the Outlook format if you are sure the recipient is using Outlook. Although the Internet format may lose some formatting and attached pictures, at least you know your contact information will make it to the recipient in a readable form.

1. Right-click your instructor's contact and select **Send Full Contact**. Select **In Internet Format (vCard)**. This is the same format used by the attachment that was included with the business card in the previous exercises.
2. When the message form opens, double-click the attachment to view the contact form. Notice that now the address appears for the contact, even though it is not on the business card. Sending a full contact includes all information you have recorded for that contact.
3. Close the contact form. Also close the e-mail form without saving changes.

Creating and Modifying Distribution Lists

A *distribution list* is nothing more than a named group of e-mail addresses. Distribution lists add convenience by allowing you to send a message to multiple recipients by simply entering the name of the list. There are several ways to begin creating a distribution list:

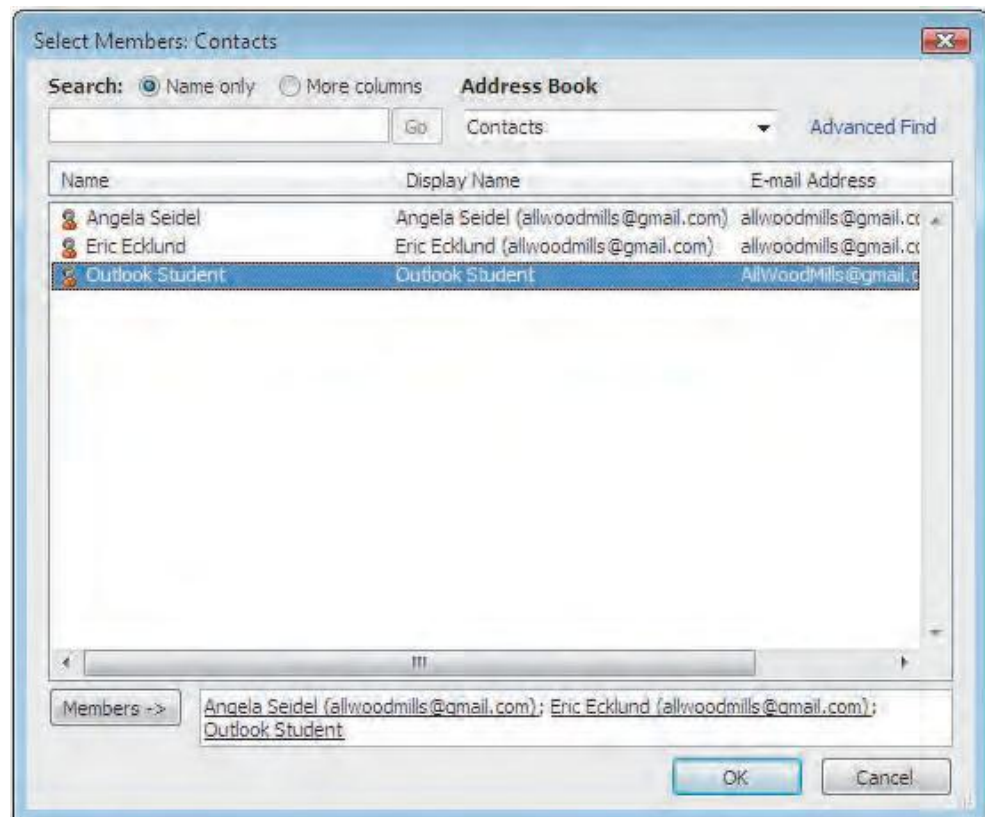
- Press **Ctrl+Shift+L** while viewing any part of Outlook.
- Right-click the contacts display area and select **New Distribution List**.
- Choose **Distribution List** from the drop-down list of the **New** button.

Exercise 2-9 CREATE AND MODIFY A DISTRIBUTION LIST

1. Click the drop-down arrow next to the New button  and select **Distribution List**.
2. The first step of creating a distribution list is giving it a name. In the Name text box key **All Contacts**.
3. To add members to the list, click the Select Members button  in the **Members** group on the Ribbon.

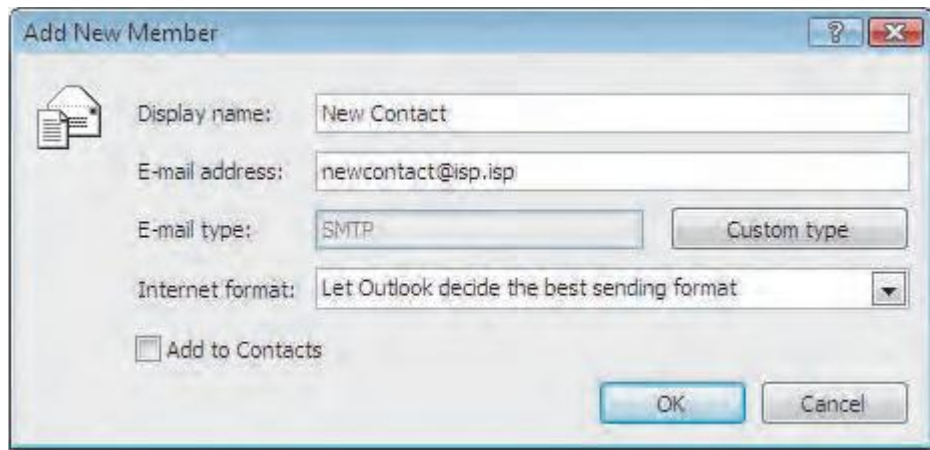


Figure 2-8
Select Members:
Contacts dialog box



4. Double-click each of your contacts to add each to the Members text box at the bottom of the dialog box. Click the OK button  when you are done.
5. Click the **Add New** button in the **Members** group on the Ribbon. This opens the Add New Member dialog box, which is used to add addresses to your list that are not currently in your contacts.

Figure 2-9
Add New Member
dialog box



6. Key the information in the Display name and E-mail address text boxes as shown in Figure 2-9. Note, but do not check, the Add to Contacts checkbox. You would use this if this were a real contact and you wanted to make it a part of your contacts list, as well as part of this distribution list. You will delete this contact in the next step, which is why you are using the information from the figure. Click the OK button  to add the new member to the list.



NOTE

When sending e-mail messages to distribution lists, you only need to type the name of the list. Because of this, it is wise to keep the names short, easy to remember, and easy to type.

7. Select the New Contact entry from the list. To delete this member from the list, click the Remove button .
8. Click the Save & Close button  to complete the distribution list. Note that the distribution list has its own business card displayed in the contacts area.

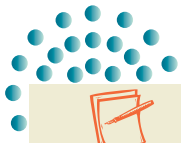
Creating a Secondary Address Book

Many users find it convenient to maintain a separate address book, or folder, for personal contacts and business contacts. Doing this in Outlook is easy. Additionally, creating a secondary address book gives you the chance to explore the ability to export and import contacts, which is another way to exchange contact information with other users.

Exercise 2-10 EXPORT CONTACTS AS AN EXCEL FILE

1. Verify that you are currently viewing your contacts.
2. Click the **File** menu and select **Import and Export**.
3. Choose **Export to a file** and click the Next button .
4. Choose **Microsoft Excel 97-2003** and click the Next button .



**NOTE**

The amount of time it takes to export depends on the number of contact records being exported.

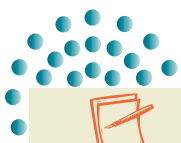


5. Verify that the **Contacts** folder is currently selected in the **Select folder to export from** hierarchy. Click the Next button .
6. Key **My Contacts.xls** into the Save exported file as: text field. Click the Next button  to accept the default location (your documents folder) for the exported contacts.
7. Click the Finish button  to complete the export.

Exercise 2-11 CREATE A NEW FOLDER TO USE AS A PERSONAL CONTACTS ADDRESS BOOK

1. While viewing contacts, click the **File** menu and choose **New** and then **Folder**.

Figure 2-10
Create New Folder
dialog box

**NOTE**

You cannot create subfolders on IMAP accounts.

2. In the Name text box of the Create New Folder dialog box, key **Personal Contacts**. Click **OK** to create the folder and close the dialog box.



3. To see the Personal Contacts folder, expand the Navigation bar to display the entire Navigation pane by clicking the chevrons button . Click **Personal Contacts** under the My Contacts header. Since this is a new address book, it currently has no contacts.

Exercise 2-12 MOVE AND COPY CONTACTS BETWEEN FOLDERS

Once you have more than one Contacts folder, you may want to move or copy existing contacts between folders.

1. Switch to your normal Contacts folder by clicking its name in the Navigation pane. Locate the business card for your instructor's contact you created earlier and click it once to select it.
2. Click the **Edit** menu. Select **Move to Folder**.



TIP

The keyboard shortcut for Move to Folder is **Ctrl**+**Shift**+**V**.

3. In the Move items dialog box, locate the **Personal Contacts** folder. If it isn't visible, you may need to click the plus sign  next to the **Contacts** folder in the hierarchy listing. Click the **Personal Contacts** folder to select it once you can see it.

4. Click the OK button  to move your instructor's contact to the **Personal Contacts** folder. Switch to the **Personal Contacts** folder by clicking it in the Navigation pane. Verify that your instructor's contact is there.
5. Select your instructor's contact in the **Personal Contacts** folder, if it is not already selected. Click the **Edit** menu and select **Copy to Folder**.



TIP

The keyboard shortcuts for Delete are either **Delete** or **Ctrl**+**D**.

6. In the Copy Items dialog box, select the **Contacts** folder and click the OK button . Switch to the **Contacts** folder using the Navigation pane and verify that your instructor's contact is once again in that folder.

7. Switch back to the **Personal Contacts** folder. Right-click the copy of your instructor's contact in this folder and select **Delete**.

Exercise 2-13 IMPORT CONTACTS FROM AN EXCEL FILE

1. While viewing the empty Personal Contacts address book, click the **File** menu and select **Import and Export**.
2. If necessary, choose **Import from another program or file** and click the Next button .

3. Select **Microsoft Excel 97-2003** and click the Next button .
4. Since the Personal Contacts address book is empty, you don't have to worry about dealing with duplicate records. However, if you import records into an address book with existing contacts, you may want to control how duplicates would be handled at this point. Click the Next button  to accept the default file and options.
5. Verify that **Personal Contacts** is selected in the **Select destination folder** hierarchy. Click the Next button  to move to the final step.
6. Click the Finish button  to complete the process. Note that all of your contacts from the original address book have now been imported into your Personal Contacts address book. Leave the Personal Contacts address book open for the next exercise.

Viewing and Printing Contacts

Outlook provides many options for viewing contacts. Additionally, you can choose from many different print formats that allow you to easily carry your contacts with you when away from your computer.

Exercise 2-14 VIEW CONTACTS

1. If the Navigation pane is minimized, restore it by clicking the chevrons button . Working in the full Navigation pane gives you easier access to the various contact view options.
2. Click the **Address Cards** option button under the Current View heading on the Navigation pane. It's likely that the cards are not quite wide enough to display all the information they contain. To adjust the width of the display column, hover your mouse pointer over the dividing line to the right of the address cards. When it becomes a double-headed arrow , drag the border out to the right until you can read all of the information.

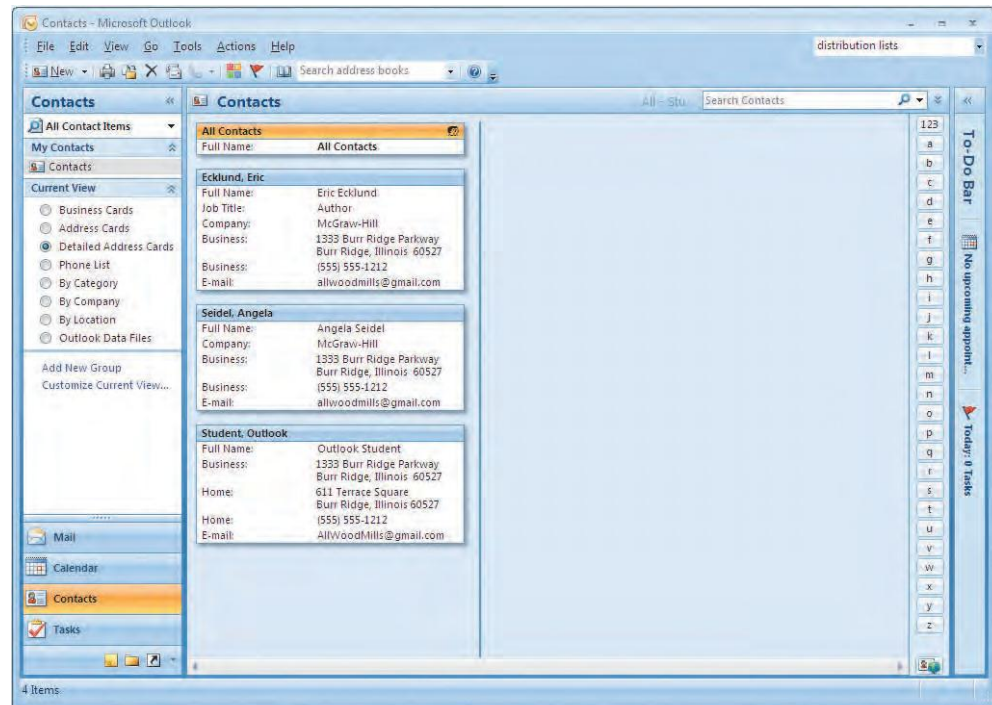


TIP

Double-clicking the column divider causes each card to take up the entire width of the contact display area. It does not autofit the address cards.

3. Click the **Detailed Address Cards** option. Note that the width of the display column for this view also needs to be adjusted. Use the same technique from the previous step to make the adjustment.

Figure 2-11
Detailed Address
Cards view



4. Click the **Phone List** option. This view can be sorted using the same technique you used in Lesson 1 for sorting the Inbox. By clicking a column header you sort by that column. Clicking the same column header again changes the sort from ascending to descending. The default sort is ascending by the File As column.
5. Click the **By Category** option. Note that all of your contacts appear under the group Categories: (none). You will learn how to assign categories to contacts, e-mail, and other Outlook components in Lesson 6.
6. Click the **By Company** option. This view is very useful when searching for contacts from a particular company as it groups them together, with the entire list sorted first by company name and then by the File As column.



TIP

The number and letter buttons down the right-hand side of the window can be used to quickly navigate your contacts list when you have more than one screen full.

7. Click the **By Location** option. This view allows you to easily see where your contacts are located, grouped by their country.
8. Click the **Business Cards** option to return to the default view.

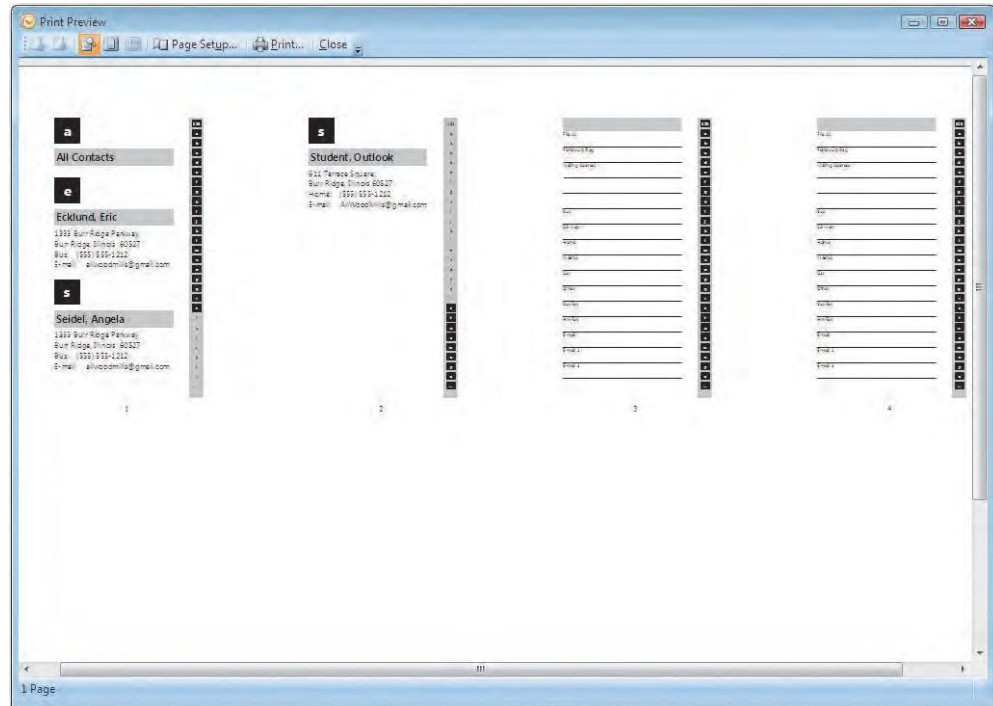
Exercise 2-15 PRINT CONTACTS

1. Click the **File** menu and select **Print**. The default print style for contacts is Card Style. Note the ability to print only the selected contact by clicking the option **Only selected items** under **Print Range**. Leave **All items** selected for now.

- Both Small and Medium Booklet Style (which is just larger pages) should ideally be duplexed, or printed on both sides of a sheet of paper. Click the Preview button  and Outlook will display a message to that effect. Click the Yes button  to clear the message and display the Print Preview screen.



Figure 2-12
Small Booklet Style
print preview



TIP

You can select multiple contacts prior to printing by clicking the first contact and then holding down **Ctrl** while selecting others.

- Note that the booklet styles are designed to be folded into booklets and include blank contact forms for you to record new contact information while away from the computer.
- Click the Print button  to return to the Print dialog box.

- Select the **Card Style** print style and click the Preview button . This style matches that of the Address Cards view. Click the Print button  to return to the print dialog box.
- Select the Memo Style and click the Preview button . This option prints each contact on an individual sheet of paper. This is the only style that does not allow you to restrict the printout to the currently selected contacts by clicking the option under **Print Range**. Instead, you could choose to only print certain pages and restrict the contacts printed in that fashion. Click the Print button  to return to the Print dialog box.



7. Select the Phone Directory Style and click the Preview button . As implied by the name, this style prints only the names of contacts and their phone numbers. Click the Close button  to leave print preview without printing.



Exercise 2-16 DELETE AN ADDRESS BOOK

Deleting a Contacts folder, or address book, also deletes all of the contacts it contains. However, it does not affect contacts stored in any other address book.

1. If the Navigation pane is minimized, restore it by clicking the chevrons button .
2. Right-click **Personal Contacts** under the My Contacts heading. Choose **Delete "Personal Contacts"**.
3. Outlook asks you to confirm the deletion. Click the Yes button  to confirm.
4. Note that you are once again viewing your normal contacts list.

Using Online Help

Outlook allows many options beyond those explored in this lesson for customizing your contacts view. One useful option is the ability to change the size of business cards so as to display more on the screen at one time.

USE HELP TO LEARN HOW TO CHANGE BUSINESS CARD SIZE

1. Start Outlook if necessary.
2. Locate the Search box and key **change business card size** and press **[Enter]**.
3. Locate and click the link **Change the card size in Business Cards view**.
4. Review the information, paying close attention to the procedure for changing the size of business cards. Note that this change will persist until you change it back.
5. Close the Outlook Help window when you are finished.

Lesson 2 Summary

- You create new contacts by filling in a new contact form.
- You can choose alternate methods for filing your contacts.
- Outlook automatically formats telephone numbers for you in the contact form.

- Outlook will ask for clarification if information you enter is unclear or incomplete.
- You can choose to save a contact and close the form, save a contact and start a new contact from scratch, or save a contact and start a new contact for another individual from the same company.
- You can create a contact from a message header by using the shortcut menu.
- You can edit business cards as to what information they display and how they look.
- You can send business cards via e-mail. Only the information displayed on the card will be available to the recipient.
- You can create a new contact from a business card you receive by using the shortcut menu.
- You can also create a new contact from an attached vCard file by using the shortcut menu.
- Full contact records can be sent in either an Outlook-only format or vCard or Internet format.
- The first step in creating a distribution list is to give it a name. You may then add existing contacts, add new contacts, or remove contacts already on the list.
- Contacts exported as an Excel file may be easily imported by another user.
- To create a secondary address book create a new Contacts folder.
- Outlook offers many different views for contacts, including: Business Cards, Address Cards, Detailed Address Cards, Phone List, and more.
- You can print contacts in a variety of ways, including booklets and lists.

LESSON 2		Command Summary	
Feature	Button	Task Path	Keyboard
Copy to Folder		Edit, Copy to Folder	
Delete		Edit Delete	Delete , Ctrl + D
Export Contacts		File, Import and Export	
Import Contacts		File, Import and Export	
Move to Folder		Edit, Move to Folder	Ctrl + Shift + V
New Contact Folder		File, New, Folder	
New Contact		File, New, Contact	Ctrl + Shift + C
New Distribution List		File, New, Distribution List	Ctrl + Shift + L
Print Contacts		File, Print	Ctrl + P

Concepts Review

True/False Questions

Each of the following statements is either true or false. Indicate your choice by circling T or F.

- T F 1. You cannot create new contacts while viewing the Inbox.
- T F 2. The default filing for contacts is lastname, firstname.
- T F 3. It is possible to change the appearance of business cards.
- T F 4. An e-mailed business card contains all contact information.
- T F 5. You cannot add addresses to a distribution list that aren't contacts.
- T F 6. The Import and Export operation is available from the Tools menu.
- T F 7. You can create new contact folders in Outlook.
- T F 8. Some contact printing options work best printed double-sided.

Short Answer Questions

Write the correct answer in the space provided.

1. Describe some of the possible methods for creating a contact.

2. Describe two methods for moving from field to field in a contact form.

3. Under what conditions would the Check Address dialog box appear?

4. How do you create a contact from an e-mail message header?

5. How do you get to the Birthday field for a contact when editing?

6. What are some of the things you can change on a business card?

7. When wouldn't you use the vCard file format to send a contact?

8. What is the default contact view?

Critical Thinking

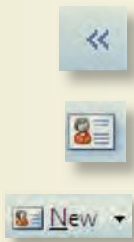
Answer these questions on a separate page. There are no right or wrong answers. Support your answers with examples from your own experience, if possible.

1. What folders, or address books, would you create for your contacts?
2. Why wouldn't you want to send a full contact to someone?

Skills Review

Exercise 2-17

Create and edit a contact; print a contact using Card Style.



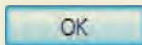
1. Minimize the Navigation pane, if it is not already minimized, by clicking the chevrons « at the top of the pane.
2. Switch to Outlook's Contacts component by clicking the Contacts button on the Navigation bar.
3. Click the New button New to open a new contact form.
4. Key the information from Figure 2-13 for this contact. Treat the address and phone number as business information.

Figure 2-13

Edward Tamm
1225 Morton Ave,
Dubuque, IA 52004
(319) 555-9876
E-mail: etamm@ISP.isp



5. Click the Save & Close button Save & Close.
6. Print the contact by following these steps:
 - a. Verify that the new contact is selected. Click it to select it if it is not.
 - b. Click the File menu and select Print.
 - c. Select the Card Style print style.
 - d. Click the option button labeled Only selected items.
 - e. Verify your printer selection and click the OK button OK to print.

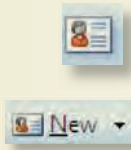


Exercise 2-18

Create a contact; send a business card via e-mail.



1. Minimize the Navigation pane, if it is not already minimized, by clicking the chevrons « at the top of the pane.



2. Switch to Outlook's Contacts component by clicking the Contacts button  on the Navigation bar.
3. Click the New button  to open a new contact form.
4. Key the information from Figure 2-14 for this contact. Treat the addresses and phone numbers as indicated.

Figure 2-14

Melissa Hill
 Business Information:
 931 BigStone Blvd.
 Houston, TX 77042
 (713) 555-1984
 Home Information:
 221 Cane St.
 Houston, TX 77042
 (713) 555-4982
 E-mail: mhill@ISP.isp

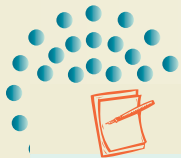


5. Click the Save & Close button .
6. Send the business card for this contact to your instructor by following these steps:
 - a. Right-click the contact you just created and select **Send as Business Card**.
 - b. Key your instructor's e-mail address in the **To** text box.
 - c. Key **Exercise 2-18 Business Card** in the **Subject** text box.
 - d. Click the Send button  to send the e-mail with the business card to your instructor.



Exercise 2-19

Create a distribution list; send distribution list as a full contact in Outlook format.



NOTE

This exercise uses the contacts created in Exercises 2-15 and 2-16. Add these contacts first if you don't have them in your contact list.



1. Create a new distribution list by following these steps:
 - a. Click the drop-down arrow next to the New button  and select **Distribution List**.
 - b. Key **New Prospects** as the name of the distribution list.
 - c. Click the Select Members button  in the **Members** group on the Ribbon.
 - d. Double-click the listings for **Edward Tamm** and **Melissa Hill** to add them to the distribution list.
 - e. Click the OK button .
 - f. Click the **Save & Close** button.
2. Send the distribution list to your instructor by following these steps:
 - a. Right-click the business card for the distribution list you just created.
 - b. Select **Send Full Contact**.

- c. Select **In Outlook Format**.
- d. Key your instructor's e-mail address in the **To** text box.
- e. Click the Send button  to send the e-mail with the full contact to your instructor.



Exercise 2-20

Create a new **Contacts** folder; add contacts from the same company; print contacts in **Card Style**.

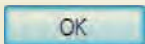
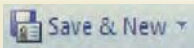
1. While viewing contacts, click the **File** menu and choose **New** and then **Folder**.
2. In the Name text box of the Create New Folder dialog box, key **ISP Contacts**. Click **OK** to create the folder and close the dialog box.
3. To see the ISP Contacts folder, expand the Navigation bar to display the entire Navigation pane by clicking the chevrons button . Click **ISP Contacts** under the My Contacts header. Since this is a new address book, it currently has no contacts.
4. Create a new contact using the information in Figure 2-15. Leave the contact open after you've entered the information.



Figure 2-15

Paul Mastovich
ISPros Inc.
16 Southside Dr.
Dubuque, IA 52004
(319) 555-1999
E-mail: pmastovich@ISP.isp

5. Create a second contact from the same company by following these steps:
 - a. Click the drop-down arrow on the Save & New button on the Ribbon . Select **New Contact from Same Company**.
 - b. Key **Pat Penrose** in the **Full Name** text box.
 - c. Key **President** in the **Job title** text box.
 - d. Click the Save & Close button  to save the new contact and close the form.
6. Click the Save & Close button again  to close the form for your original contact.
7. Print the contacts by following these steps:
 - a. Verify that you are viewing the ISP Contacts address book.
 - b. Click the **File** menu and select **Print**.
 - c. Select the **Card Style** print style.
 - d. Verify your printer selection and click the OK button  to print.



Lesson Applications

Exercise 2-21

Create contacts; edit contacts; edit electronic business cards; print contacts.

1. Create the contacts shown in Figure 2-16 in your normal Contacts folder. The addresses and phone numbers should be entered in the business fields for both contacts.

Figure 2-16

Tom Hoover	Jody Kirk
289 Spiral Dr.	1782 East Ave.
St. Louis, MO 63136	St. Louis, MO 63136
(314) 555-1723	(314) 555-0821
E-mail: thoover@ISP.isp	E-mail: jkirk@ISP.isp



2. Edit the contact for Tom Hoover. Key **Hoover's Hardwoods** in the **Company** text box. Key **President** in the **Job title** text box.
3. Switch to the **Details** fields for Tom Hoover. Key your name in the Assistant's name text box.
4. Edit the business card for Tom Hoover to move the phone number under the e-mail address. Do this by clicking the entry for **Business Phone** in the Fields list and clicking the Move Field Down button  one time.
5. Save and close the Tom Hoover contact.
6. Edit the contact for Jody Kirk. Key **Fine Furniture Finishes** in the **Company name** text box. Key **Sales Manager** in the Job title text box.
7. Switch to the **Details** fields for Jody Kirk. Key your name in the Assistant's name text box.
8. Edit the business card for Jody Kirk to move the phone number under the e-mail address. Use the same method you used for the other contact.
9. Save and close the Jody Kirk contact.
10. Select the business cards for both contacts. Do this by clicking one of the cards and then hold down **[Ctrl]** while clicking the other. The order in which you do this is not important.
11. Print the selected contacts in Memo Style. Each will print on its own page.

Exercise 2-22

Create and modify contacts; create a distribution list; send a full contact record.

1. Create the contacts shown in Figure 2-17 in your normal Contacts folder. The addresses and phone numbers should be entered in the home fields for both contacts.

Figure 2-17

Melissa Wingard 82 Melody Ave. Chicago, IL 60606 (312) 555-8856 E-mail: mwingard@ISP.isp	Jane Yakicic 3520 Willow Dr. Minneapolis, MN 55432 (612) 555-6218 E-mail: jyakicic@ISP.isp
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2. Create a distribution list named **Media Buyers**.
3. Add both of the contacts you created in Step 1 to the Media Buyers distribution list.
4. Save and close the Media Buyers distribution list.
5. Right-click the Media Buyers distribution list business card and select **Send Full Contact**. Select the Outlook format.
6. Address the e-mail to your instructor and send it.
7. Add the job title **Media Buyer** to both contacts from Step 1.
8. Select the business cards for the two contacts created in Step 1. Remember to use the **[Ctrl]+click** method to select the second contact.
9. With both contacts selected, right-click one and select **Send Full Contact**. Select the Outlook format.
10. Address the e-mail to your instructor with the subject line **Media Buyer Contacts**. Verify before sending that both contacts are listed as attachments. Send the e-mail.

**TIP**

Instead of right-clicking, you can access Send Full Contact from the Actions menu after both contacts have been selected.

Exercise 2-23

Create contacts; create a secondary address book; move contacts; create a distribution list; print contacts.

1. Create the contacts shown in Figure 2-18 in your normal Contacts folder. The addresses and phone numbers should be entered in the business fields for both contacts.

Figure 2-18

Lynda Fischer 734 Highlands Blvd. Kansas City, MO 64105 (312) 555-4582 E-mail: lfischer@ISP.isp	Mike Artim 992 Amanda Dr. Milwaukee, WI 53204 (414) 555-8007 E-mail: martim@ISP.isp
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2. Create a distribution list named **All Independent Dealers**. Add both of the contacts from Step 1 to this list.
3. Create a new Contacts folder named **Independent Dealers**.
4. Move the two contacts you created in Step 1 into the Independent Dealers folder. Move the distribution list you created in Step 4 to the same folder.

- While viewing the Independent Dealers folder, print all items in Small Booklet Style. (*Hint: Click Yes when prompted about double-sided printing.*)
- Return to viewing your normal Contacts folder.

Exercise 2-24 ♦ Challenge Yourself

Create contacts; create a distribution list; print contacts.

You've been asked to create contacts for six key employees of AllWood Mills, Inc. from the existing phone and e-mail directory information. Once you have the contacts created, you are also to create a distribution list for those employees and print out their contact information in the form of a booklet.



TIP

Use the drop-down arrow beside the **Save & New** button in the contact form to select **New Contact from Same Company** after you create the first contact.

- Create contacts in your normal Contacts folder for the six individuals listed in the telephone and e-mail directory in Figure 2-19. All employees are located at the same address, but each has a unique telephone number and e-mail address. Be sure to include the company name and their job titles in their contact information.

Figure 2-19

AllWood Mills, Inc.			
3100 JACKSON STREET DUBUQUE, IA 52001			
NAME	TITLE	PHONE	E-MAIL
Rob Connelley	President	(563) 555-7701	rconnelley@ISP.isp
Paul Epstein	Head of Manufacturing	(563) 555-7703	pepstein@ISP.isp
Jasmine Jones	Head of Sales	(563) 555-7705	jjones@ISP.isp
Maria Lopez	Head of Administration	(563) 555-7707	mlopez@ISP.isp
Will McCarthy	Head of Design	(563) 555-7709	wmccarthy@ISP.isp
John Yu	Head of Marketing	(563) 555-7711	jyu@ISP.isp

- Create a distribution list for the six contacts you just created named Executive Staff. Send this list to your instructor as a full contact using the Outlook format.
- Select the six contacts (*hint: use the **Ctrl**+click method*) and print the selected items using the Small Booklet Style.

On Your Own

In these exercises you work on your own, as you would in a real-life work environment. Use the skills you've learned to accomplish the task—and be creative.

Exercise 2-25

Create contacts for each of your other instructors in the same manner you did in the lesson for your instructor in this class. Create a distribution group with an appropriate name that includes your instructors as members. Use the distribution list to send a brief greeting to your instructors, explaining that it is for a class assignment.

Exercise 2-26

Create contacts for friends and family you would be likely to send a mass e-mail to (holiday greetings, party invitations, etc.). Create a distribution list for these contacts. Create a new Contacts folder with an appropriate name and move both the contacts you've created and the distribution list into this new folder. Use the distribution list to send a brief note to these contacts.

Exercise 2-27

Open the contact you created for yourself earlier in the lesson. Experiment with the various options you have for customizing your electronic business card. Use Outlook Help if necessary to further explore these options. Customize your business card to make it unique and attractive. Send the customized business card to your instructor.

Unit 1 Applications

Unit Application 1-1

Create and send a new e-mail message with a file attachment and print the new e-mail message.

Bob Michols, AllWood's president, needs some information e-mailed to him quickly. He wants a list of all the living-room pieces in this year's Mission collection, plus the Excel file of Mission sales data for the fourth quarter.

1. Create a new e-mail message, addressing it to your instructor.
2. For the subject, key **Mission Collection information**.

3. In the message area, key:

Bob:

Here is a list of Mission living room pieces for the 2007 season. Note that it includes the three new items. I am setting aside time in my calendar next week to meet with you. Attached you will find the sales figures for the fourth quarter.

4. Open the Word file **Mission1** and copy the list of the living-room pieces to the Clipboard. Close the Word file and Word, and paste the contents of the Clipboard into the message area below the text you keyed in Step 3.
5. Add the following items to the list:
Computer workstation
CD storage rack
Writing desk
6. Attach the Excel file **MSalesQ4**.
7. Send the message.
8. Display the Sent Items folder, and select the message you just sent. Print out the message using a Memo Style as the print style.
9. Hand in the printout to your instructor.

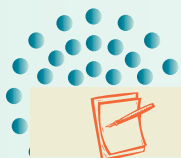
Unit Application 1-2

Create a contact, send a new e-mail message using the contact in the Cc field, attach a business card, and print the e-mail message.

You recently met Jon Lopez, the Vice President of Widget Inc. Jon wants to collaborate with your company and asked you to e-mail your company president to introduce him.

1. Create a new contact with the following information:

Full Name:	Jon Lopez
Company:	Widget Inc.
Job title:	Vice President



NOTE

Your instructor will provide you with an appropriate e-mail address.

E-mail: Your instructor will provide you with an appropriate e-mail address.

Display as: Jon Lopez, Vice President

Business phone number: 555-6698

Mobile phone number: 555-1123

Address: 55-559 Honolulu St.

2. Create a new e-mail message, addressing it to your instructor.
3. In the Cc field, key **Jon Lopez's e-mail address**.
4. For the subject, key **Collaboration Opportunity**.

5. In the message area, key:

President Barnes:

I recently met Jon Lopez, Vice President of Widget Inc., and he is carbon-copied on this e-mail message. He is hoping that you will contact him regarding potential collaboration opportunities. Attached you will find Jon's business card.

6. Attach Jon Lopez's business card (contact).
7. Send the e-mail.
8. Display the Sent Items folder, and select the message you just sent. Print out the message using a Memo Style as the print style.
9. Hand in the printout to your instructor.

Unit Application 1-3

Send new e-mail messages, forward a received e-mail message, and create contact information.

Bob Michols, AllWood's president, has asked his Vice President of Design to create a line of office furniture. The line will use some existing pieces from each of the existing collections, as well as new pieces. You've been asked to join the team working on this project. Your initial tasks will be to exchange information with other team members, define responsibilities, and set up meeting times.

1. Create a new e-mail message, addressing it to your teammate. The subject of the message is **My contact information**.

2. In the message area, key:

Here is my contact information for your contact list. I've included my home address and phone number.

Name:

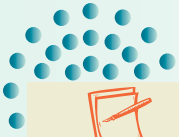
Address: (Home)

Phone: (Home)

Phone: (Word, if applicable)

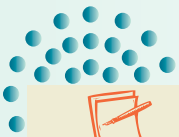
3. Send the e-mail message.

4. Display the Sent Items folder, and select the message you just sent. Print the message using a Memo Style as the print style.



NOTE

Your instructor will provide you with an appropriate e-mail address.



NOTE

This exercise is a team effort. Your instructor will assign a classmate to work with you as a team member. You will be required to exchange e-mail messages with your teammate to complete this exercise. Your instructor will provide e-mail addresses for your teammate.

5. Create a new contact for Bob Michols, keying the information below:

Full Name:	Bob Michols
Company:	AllWood Mills Inc.
Job title:	President
E-mail:	Your instructor will provide you with an appropriate e-mail address.
Display as:	Bob Michols, President
Business phone number:	555-4400
Mobile phone number:	555-4401
Address:	55-580 Honolulu St.

6. Open the contact information e-mail message you received from your teammate. Forward the message to Bob Michols. Use the **To** button to address the message from your contact list.
7. Above the original message, key **For your records, here is the contact information I received.**
8. Send the e-mail message.
9. Display the Sent Items folder, and select the message you just sent. Print the message using a Memo Style as the print style.

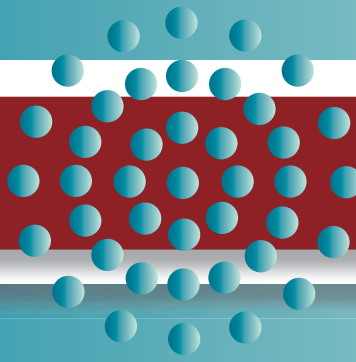
Unit Application 1-4 ♦ Using the Internet

Pick a friend or relative to whom you'd like to give a gift. The occasion could be a holiday or birthday. Think of that person's hobbies or interests and locate Web sites that specialize in those products. For example, the gifts might be music CDs, computer games, jewelry, specialty coffees, books, sporting goods, and so on.

Choose at least three products, preferably in different price ranges. Do comparison shopping on at least four different Web sites selling the same or similar product. If possible, note the shipping costs associated with each online retailer. Find the contact information for each online retailer in the event that you have questions regarding the product. After you've obtained your information, use Outlook to do the following:

- Compose an e-mail message describing the information you've obtained, addressing it to your instructor. Include the address of the Web site for each of the online retailers. Send the message and print a copy of the message from the Sent Items folder. Hand the printed copy in to your instructor.
- Create a contact for each retailer with the information you found on the Internet for quick access. Include as much information as possible including phone numbers (if applicable).

unit 2



MANAGING YOUR SCHEDULE AND TASKS

Lesson 3 Managing Scheduling 60

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UNIT 2 APPLICATIONS 119

Lesson 3

Managing Scheduling

OBJECTIVES

MCAS OBJECTIVES

In this lesson:

OL07 2.1.1
OL07 2.1.2
OL07 2.1.3
OL07 2.1.4
OL07 2.1.5
OL07 2.2.1
OL07 2.2.2
OL07 2.2.3
OL07 2.2.4
OL07 2.2.5
OL07 2.3.1
OL07 2.3.2
OL07 2.3.3
OL07 2.3.4
OL07 2.3.5
OL07 2.4.1
OL07 2.4.2
OL07 2.4.3
OL07 2.4.4
OL07 2.5.1
OL07 2.5.2
OL07 2.5.3
OL07 2.5.4
OL07 2.6.1
OL07 2.6.2
OL07 2.6.3

After completing this lesson, you will be able to:

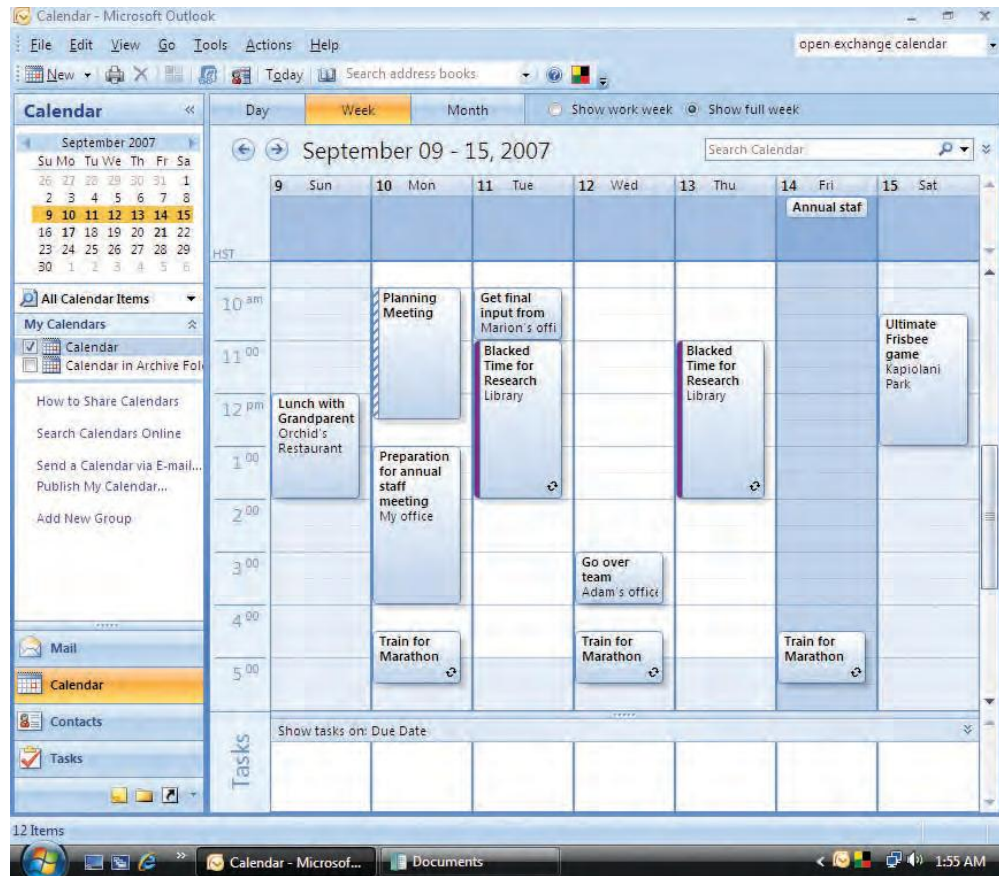
1. Navigate within the Calendar.
2. Schedule appointments, meetings, and events.
3. Send, respond to, and manage meeting requests.
4. Customize your Calendar.
5. Share and view shared Calendars.

Estimated Time: 2 hours

When your workday is filled and requires managing your schedule, you can use Outlook's Calendar to help you keep track of and plan everything you have to do. You can use the Calendar to schedule appointments and events. You can set up meetings and invite participants. You can even manage invitations and replies to your meetings.

You can set reminders for yourself and easily reschedule when your needs change. Outlook also allows you to publish your Calendar to share it electronically with others and in turn allows you to subscribe to others' published Calendars.

Figure 3-1
The Calendar provides an easy way to track meetings and appointments to manage your schedule



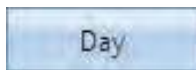
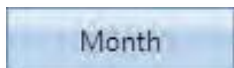
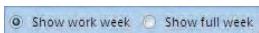
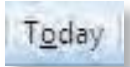
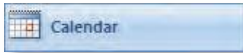
Navigating Within the Calendar

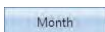
You can access Outlook's Calendar from the Outlook menu bar as well as from the Navigation pane. As with other Outlook components, the Calendar has its own view, and you can access all items associated with the Calendar within this view.

Navigating within the Calendar is similar to navigating within other components of Outlook. You can use the mouse, keyboard shortcuts, or menus to access Calendar functions. You can display the Calendar in a variety of time frames, ranging from a single day to an entire month.

Exercise 3-1 NAVIGATE WITHIN THE CALENDAR

The Calendar is divided into several different areas. The Appointments Calendar occupies most of the right half of the screen. It divides the day into half-hour segments and shows any scheduled appointments, meetings, and events. The lower-right portion of the Calendar contains the TaskPad, which is a detailed list of current tasks. The upper-left half of the Calendar is the Date Navigator, which shows a complete month of the year and has navigation arrows for traversing through the Calendar. Just below the Date Navigator are two pop-up panes that allow organization by folder and Calendar. There is also a pane that shows helpful hints according to your activity.



1. Switch to Outlook's Calendar component by clicking on the Calendar button  on the Navigation bar. The Calendar view appears.
2. Drag the scroll bar on the right side of the Appointments Calendar to display the hours at the beginning and end of the day. The normal work hours are shown in white and are displayed by default. Hours outside of the normal workday are shown in grey.
3. In the Date Navigator, click the date of the next business day. Notice that the Appointment Calendar changes to that date. The current date is shown in a red box. Click the Today button  on the Standard toolbar to return to the Appointments Calendar for the present day.
4. Position the pointer over the current month title at the top of the Date Navigator. Click and hold briefly. Notice that you can adjust the month by using the displayed menu. You can also click the arrow keys next to the month titles to adjust the months sequentially.
5. Click the Week tab  at the top of the Appointments Calendar. The Appointments Calendar displays in a Week view. In the Week view, two radio buttons also appear to the right of the Day/Week/Month tabs in the Appointments Calendar. If the Appointments Calendar is in Week view, clicking a day in the Date Navigator will change the view to the week containing the date clicked. The view will automatically change to a particular Day view when you click any date column header in the Appointments Calendar.
6. Click the Show work week radio button  to view the current week excluding weekend days. Click the **Show full week** radio button to view the current week including weekend days. Notice that the space available for the display of daily tasks in the TaskPad is necessarily limited in this view.
7. Click on the Month tab  at the top of the Appointments Calendar. The Appointments Calendar displays in Month view. Notice that the space available for the display appointments is necessarily smaller than in previous views, and the TaskPad is no longer displayed.
8. Click the Day tab  at the top of the Appointments Calendar to redisplay the Day view. You can also change the view of the Appointments Calendar by using the View menu command.

Creating Appointments, Meetings, and Events

An appointment is an activity occurring at a specific day and time that does not require inviting people to attend or reserving a room (or other resources). For example, a weekly activity with your supervisor could be considered an appointment. You can specify that an appointment should appear automatically in your Calendar at specified intervals. You can also have Outlook remind you of appointments.

A meeting is an activity that requires inviting others and checking that others do plan to attend. For example, a group review activity could be considered a meeting. You can send and track invitations to meetings in your Calendar.

Exercise 3-2 CREATE A ONE-TIME APPOINTMENT, MEETING, OR EVENT

You can add a new appointment by using the Appointment form or by entering the appointment directly in the Appointments Calendar.

There are several ways to begin the process of creating an appointment in Outlook. You can:

- Press **Ctrl+N** while viewing the Calendar.
 - Press **Ctrl+Shift+A** while viewing any part of Outlook.
 - Click the New button while viewing the Calendar.
 - Choose Appointment from the drop-down list of the New button.
1. Switch to Outlook's Calendar component by clicking on **Calendar** on the Navigation bar. The Calendar view appears.
 2. Click the date on the Date Navigator one week from the current date. Notice that the Appointment Calendar automatically displays this date.
 3. Click the New button  on the Standard toolbar. The Appointment form appears, using the date displayed in the Appointments Calendar as the default date for the appointment.
 4. In the Subject field, key **Weekly Meeting with Dave**.
 5. Press **Tab**, and in the Location field, key **Dave's Office**.
 6. For the Start time, leave the date provided, but change the time to 10:00 A.M. Notice that the End time is automatically set to 10:30 A.M. Leave this time for now.
 7. Click on the Save & Close button .



Exercise 3-3 CREATE A RECURRING APPOINTMENT, MEETING, OR EVENT

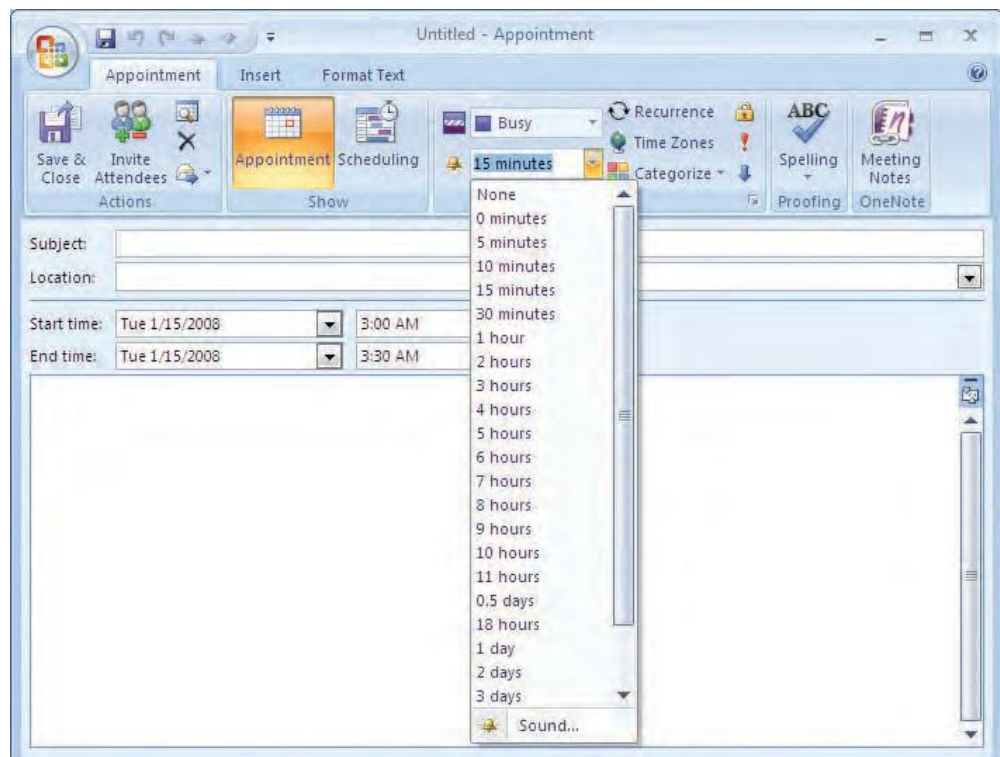
Appointments that occur repeatedly are recurring appointments. Examples of recurring appointments are a weekly status meeting or a monthly haircut.

You can specify a new appointment as a recurring appointment, or you can edit an existing appointment to make it recurring. When you create a recurring appointment, you define:

- The recurrence pattern, which specifies when the recurrence takes place (such as monthly or every Friday).
- The range of recurrence, which specifies how long or for how many times the recurrence takes place.

1. Click the next business day from the current date on the Date Navigator.
2. Click the **New** button to create a new appointment. The Appointment form appears.
3. In the Subject text box, key **Dr. Payne**.
4. In the Location text box, key **21 East West Rd., Suite 100**.
5. Set the Start time as **1:00 PM** and the End time as **1:30 PM**.
6. Choose **None** from the Reminder list box.

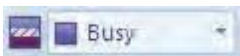
Figure 3-2
The Reminder list box gives quick access to the most common reminder times.

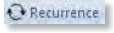


TIP

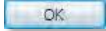
The reminder for a new appointment is preset to 15 minutes. You can choose a different reminder period, include a sound reminder, or choose no reminder at all from this list.

7. Click the down arrow on the Show As list box  and choose **Out of Office**. Outlook classifies your appointments in different ways, using colors and patterns to code the appointment type in various views. Out of Office displays a purple border on the left side of the appointment.



8. Click the Recurrence button  on the Appointment form toolbar. The Appointment Recurrence dialog box appears.
9. Under Recurrence Pattern, select the **Monthly** option, and select options so that it occurs the second Friday of every month ("of every 1 month(s)").
10. Under Range of recurrence, select **End after**, and key **6** for the number of occurrences.



11. Click the OK button .
12. Click the **Save & Close** button. The new appointment is scheduled as a monthly recurring appointment.
13. Select the date in the Date Navigator of the first occurrence of this appointment. The appointment in the Appointments Calendar displays a recurrence icon on each instance of this event in the Calendar.

Exercise 3-4

CREATE AN APPOINTMENT, MEETING, OR EVENT FROM AN E-MAIL MESSAGE

Sometimes you may wish to create an appointment concerning the content of an e-mail that you receive.



1. Click the Mail button  on the Navigation bar. The Mail view appears.
2. If the To-Do Bar is not visible, then from the menu bar, click the **View** menu and then click the **To-Do Bar** menu item. From the submenu that appears next to the To-Do Bar menu item, click **Normal**. Click and drag one of the e-mails in the Inbox pane to the next business day in the To-Do Bar pane. The Appointment form appears.
3. In the text area you will see information and content from the e-mail that was used to create this appointment.
4. In the Location text box, key **My Office**.
5. Set the Start time as **2:00 P.M.** and the end time as **2:30 P.M.**
6. Click the **Save & Close** button. The e-mail is saved as a new appointment in your Calendar.

Exercise 3-5

CREATE AN APPOINTMENT, MEETING, OR EVENT FROM A TASK

Sometimes you may wish to create an appointment concerning a task to give the task some specified work time and place in your schedule. Let's create a new task and then put it into our schedule.

1. Click **Calendar** on the Navigation bar. The Calendar view appears.
2. Click the arrow beside the New button in the Toolbar and choose **Task** from the menu that appears. The Task form appears.
3. In the Subject text box, key **Paint a still life**.
4. Change the start and end date to today's date.
5. Click the **Save & Close** button. The task appears in the task list for today. That means this task is due today, so you should schedule some time for it.

6. Click and drag the task from the task pane to the 3 P.M. slot in the Appointments View. A 30-minute appointment is scheduled for the task at 3 P.M. in your Calendar. At this point, you can open the appointment and make any necessary edits.
7. Double-click the new appointment. The Appointment form appears. In the text area you will see information about the task that was used to create this appointment.
8. In the Location text box, key **The Park**.
9. Click the **Save & Close** button. The Calendar view appears.

Exercise 3-6 MARK AN APPOINTMENT, MEETING, OR EVENT AS PRIVATE

You can also mark appointments as private so that the subject of the appointment is hidden from individuals who have access to your Calendar. The word “Private” appears instead of the actual subject. You can mark an appointment as private by editing the appointment and selecting the Private button on the Appointment form toolbar.

1. Click **Calendar** on the Navigation bar. The Calendar view appears.
2. Click the date on the Date Navigator one week from the current date. Notice that the Appointment Calendar automatically displays the selected date. You should now see the appointment created in Exercise 3-2.
3. Click once on the Appointment to select it. The border around the appointment changes to a thick black line with handles to show it is selected.
4. In the menu bar, click the **File** menu and then click the **Open** menu item. From the submenu that appears next to the Open menu item, click **Selected Items**. The Appointment dialog box appears.
5. Click to select the Private button  in the Appointments form toolbar. The Private button will be highlighted.
6. Click the **Save & Close** button. The Calendar view appears.
7. A lock icon appears on the Appointment indicating that the Appointment is private.



Sending Meeting Requests

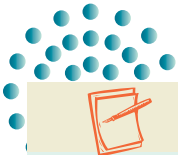
A meeting is an activity that involves inviting other people or reserving resources. A resource might be a conference room, audiovisual equipment, or other shared organizational space or equipment used for meetings. You can use Outlook to plan your meetings and invite the meeting participants.

You can send and track invitations to meetings in your Calendar. Sometimes meetings should not be held unless some key individuals attend. Sometimes you may want to invite an individual, but the meeting will go on

whether they attend or not. You may also want to plan a meeting according to others' availability. Outlook provides methods of scheduling these types of meetings and also methods of tracking the responses and scheduling the needed resources for a meeting. Let's explore these methods.

Exercise 3-7 PLAN A MEETING AND INVITE MANDATORY ATTENDEES TO THE MEETING

Planning a meeting involves finding an available time in your schedule for the meeting and inviting the meeting attendees. Outlook notifies the individuals via e-mail of your meeting request.



NOTE

You will be using the names and e-mail addresses of your classmates to invite to your meeting. Your instructor will provide you with a list of names and e-mail addresses. Because you will be inviting each other to your meetings, you will need to select a day for your meeting that is not in conflict with other students' meetings. Your instructor will assign a date for you to use.

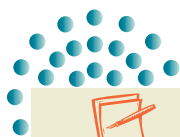
1. Switch to Outlook's Calendar component by clicking on **Calendar** on the Navigation bar. The Calendar view appears.
2. Display the Appointments Calendar for a business day your instructor has assigned for you within the next three weeks. Delete any previous appointments for that day.
3. Choose **Actions, Plan a Meeting** from the menu. The Plan a Meeting form appears. Appointments are color-coded. You can use the scroll bar under the time grid to adjust the times and days shown on the grid.

Figure 3-3
The Plan a Meeting form allows comparison of free times across multiple Calendars

4. Click various time blocks on the time grid. The shaded column with a green left-border and red right-border represents the selected meeting time for all attendees, and it moves in the time grid as you

click a different block. Notice that the times shown in the Meeting start time and Meeting end time fields change as you click locations in the time grid. You can also use these fields to manually specify the starting and ending times of the meeting.

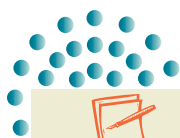
5. Click a time block under 2:00 so the meeting is set to run from 2:00 P.M. to 2:30 P.M.
6. Position the pointer over the red border of the shaded column and drag to expand the highlighted column to 3:00. The meeting is now 1 hour long, from 2:00 P.M. to 3:00 P.M.
7. In the All Attendees list, your name and e-mail address are listed as the first attendee because you are calling the meeting. The first row under your name contains the text "Click here to add a name." Click on this row and key in your first invitee, **Classmate 1 <[name]@[ISP]>**.

**NOTE**

Use the e-mail address from the list of valid e-mail addresses your instructor has provided you. You will send meeting requests to your classmates via e-mail.

8. There are two columns to the left of the attendees' names in the All Attendees list. The first column contains a check box to send an e-mail about the meeting to the attendee. Clicking in the second column allows you to specify whether this row is a required attendee, optional attendee, or resource.

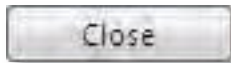
9. Click the column to the left of the row in which you keyed Classmate 1, and choose **Required Attendee** from the pop-up menu. Note that you can distinguish between required meeting attendees and optional ones, and between attendees and resources.
10. In the All Attendees list, the next row under the one where you keyed Classmate 1 now contains the text "Click here to add a name." Click on this row and key in your second invitee, **Classmate 2 <[name]@[ISP]>**.

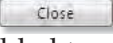
**NOTE**

Use an e-mail address from the list of valid e-mail addresses your instructor has provided you.

11. Click the column to the left of the row in which you keyed Classmate 2, and choose **Required Attendee** from the pop-up menu. There are two names in addition to yours in the All Attendees list. If you invite individuals who have made their Calendars available to others, you can see if they are free at the time you select. However, the individuals you've invited have not made their Calendars available, so their schedules show the No Information code.

12. Click the Make Meeting button in the Plan a Meeting form. The Meeting form appears. The attendees' names appear in the To field automatically.
13. In the Subject field, key **Discuss conference topics**.
14. In the Location field, key **My Office**.
15. In the large text box in the lower half of the form, key **Go over major topics and discuss PowerPoint slide show material**.
16. Click the arrow beside the Reminder bell in the Meeting form and choose **None**.



17. Connect to the Internet and click the Send button  on the Meeting form to send the invitations to the specified recipients.
18. Click the Close button  to close the Plan a Meeting dialog box. The meetings is added to your Appointments Calendar.

Exercise 3-8 INVITE OPTIONAL ATTENDEES TO MEETINGS

You can invite an individual whose attendance is optional for the meeting to take place.

1. Click once on the appointment you created in Exercise 3-7 in your Appointments Calendar to select it. The border around the Appointment changes to a thick black line to show it is selected.
2. In the menu bar, click the **File** menu and then click the **Open** menu item. From the submenu that appears next to the Open menu item, click **Selected Items**. The Meeting form appears.
3. Click the Scheduling button  in the Meeting form toolbar. The Meeting form will change to show the Attendees list and the Scheduling pane.
4. In the All Attendees list, the next row under the one where you keyed Classmate 2 now contains the text "Click here to add a name." Click on this row and key in your third invitee, **Classmate 3 <[name]@[ISP]>**.
5. Click the column to the left of the row in which you keyed Classmate 3, and choose **Optional Attendee** from the pop-up menu. There are now three names in addition to yours in the All Attendees list. If you invite individuals who have made their Calendars available to others, you can see if they are free at the time you select. However, the individuals you've invited have not made their Calendars available, so their schedules show the No Information code.



NOTE

Use an e-mail address from the list of valid e-mail addresses your instructor has provided you.

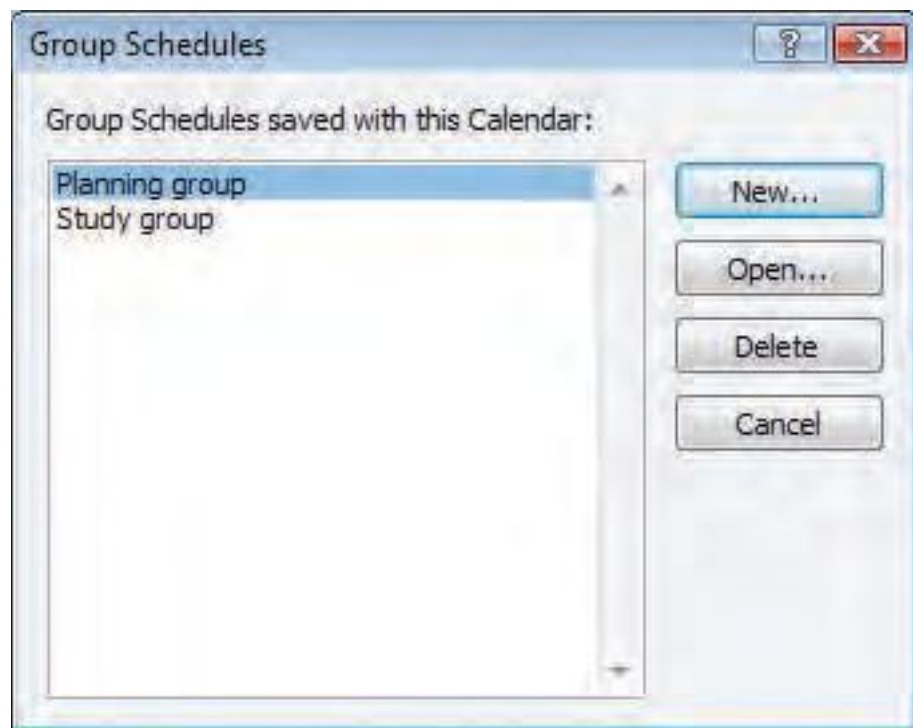
6. In the All Attendees list, click on the text **Classmate 1**.
7. Press **Delete**. Classmate 1 is eliminated from the list of meeting attendees.
8. Click the **Send** button above the attendees list. The Send Updates to Attendees dialog box appears. In this dialog box, you have the options of resending the request to all attendees or only to the ones that have been added or deleted.
9. Select **Send updates only to added or deleted attendees** if it is not already selected, and then click **OK**. The Meeting form closes. Outlook sends a meeting request to Classmate 3 and notifies Classmate 1 that the meeting is canceled.

Exercise 3-9 DETERMINE WHEN ATTENDEES ARE AVAILABLE TO MEET USING GROUP SCHEDULES

A group schedule gives you one place to track the Calendars of several people. To use group schedules, all the members of the group must be on a Microsoft Exchange network. In the Scheduling view of the Meeting form, you can use Smart Scheduling to find mutual meeting times.

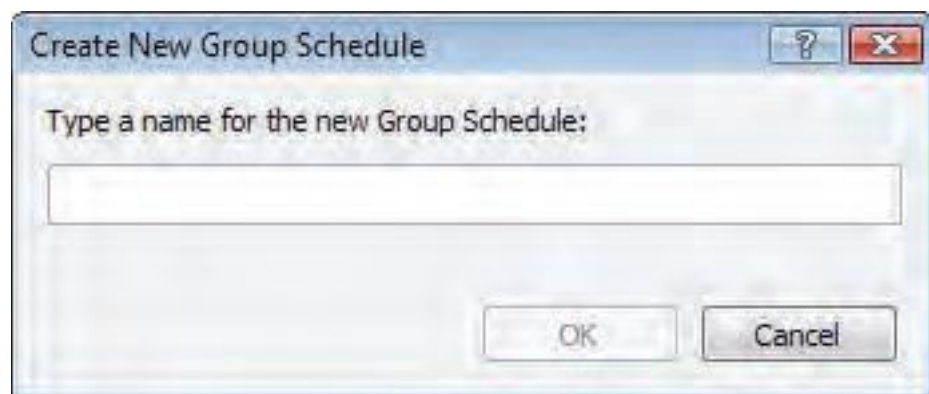
1. In the Calendar view, click the **Actions** menu and then click the **View Group Schedules** menu item. The Group Schedules dialog box appears.

Figure 3-4
The Group Schedules dialog box allows creation of common groups of individuals' default Calendars



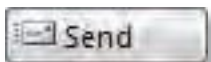
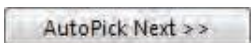
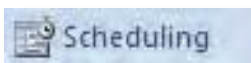
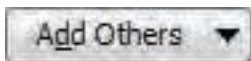
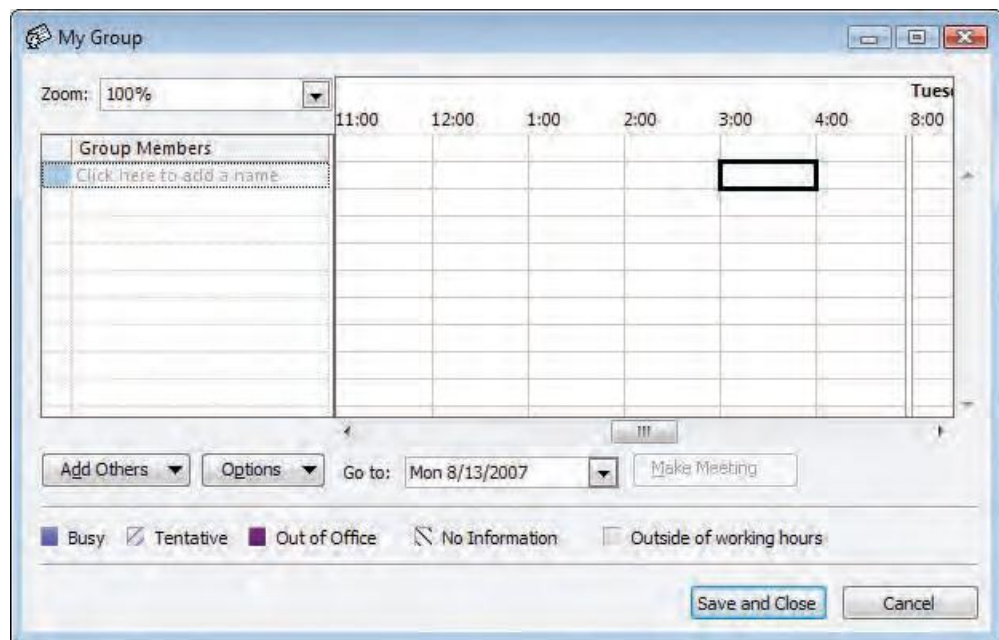
2. Click the New button .

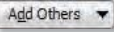
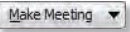
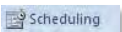
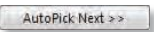
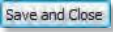
Figure 3-5
The Create New Group Schedule dialog box is used to name Groups



3. In the Create New Group Schedule dialog box, type a name for this group schedule, and click **OK**. A form appears for setting up your Group.

Figure 3-6
The Group settings form allows you to add contacts with shared Calendars



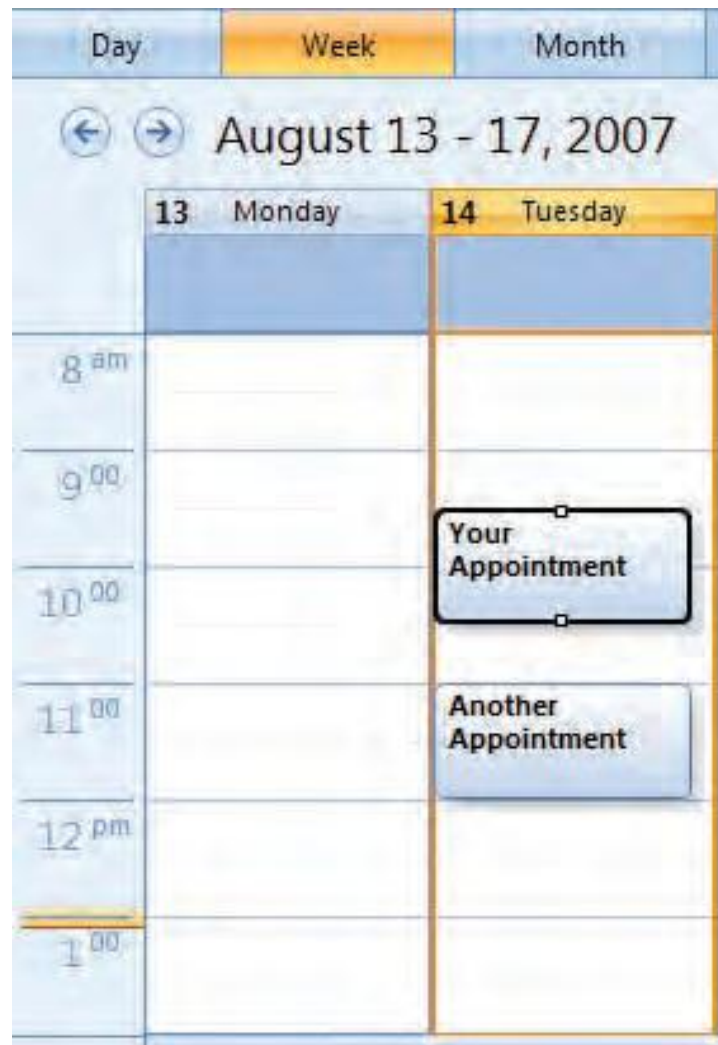
4. Click the Add Others button  and click the **Add from Address Book** item to open the Select Members dialog box.
5. Double-click the names you want in the group schedule.
6. Click **OK** when you have chosen all the names you want.
7. Click the Make Meeting button  and chose **New Meeting**.
8. In the Subject field, key **Invitation**.
9. Click the Scheduling tab  in the Show section of the Meeting form toolbar.
10. Click the AutoPick Next button  to find the next available time among all the schedules included in the group. If the time chosen is not satisfactory, then continue to click **AutoPick Next** to find the next available time in the Group Schedules.
11. Connect to the Internet and click the Send button  on the Meeting form to send the invitations to the specified recipients.
12. Click the Save and Close button  to close the Group Settings dialog box. The meeting is added to your Appointments Calendar.

Exercise 3-10 TRACK RESPONSES TO MEETING REQUESTS

As you have learned, you can send out invitations for a meeting. You can also track those responses and even allow or disallow new time propositions from your invitees.

1. Click once on the appointment you created in Exercise 3-7 in your Appointments Calendar to select it. The border around the Appointment changes to a thick black line with handles to show it is selected.

Figure 3-7
A selected appointment in the Appointments Calendar appears with a thick border and handles



2. In the menu bar, click the **File** menu and then click the **Open** menu item. From the submenu that appears next to the Open menu item, click **Selected Items**. The Meeting form appears.
3. Click the **Scheduling** button in the Meeting form toolbar. The Meeting form will change to show the Attendees list and the Scheduling pane.



4. You should see an Attendees tab  in the toolbar of the Meeting form. This section of the toolbar contains the Responses tool. The Responses tool allows you to Request Responses and also Allow New Time Proposals from your invitees.



5. Click on the Responses tool  and verify that Request Responses is checked.

6. Click on the Responses tool  and uncheck **Allow New Time Proposals**.

7. Click on the Responses tool  again to verify that Request Responses is checked and that Allow New Time Proposals is unchecked.

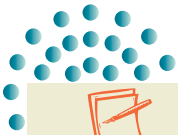
8. Press **Ctrl+S** to save your response changes.



9. Close the window .

Exercise 3-11 SCHEDULE ATTENDEES AND MEETING RESOURCES FROM YOUR ADDRESS BOOK

If office resources are set up for reservations using Outlook, booking a resource is the same as requesting a meeting with an individual.



NOTE

You will be using the names and e-mail addresses of your classmates to invite to your meeting. In previous exercises you have used direct entry. For this exercise, you will create contact cards for each of your classmates in the Outlook Contacts component. Your instructor will provide you with a list of names and e-mail addresses.

1. Using the skills you learned in Unit 1, Lesson 2, switch to the Contacts component and create contact cards with the names and e-mail addresses of your classmates from the list provided by your instructor.
2. Select a day in your Appointment Calendar roughly two weeks in advance of the current date.
3. Select **4 PM**.
4. In the menu bar, click the **Actions** menu and then click the **Plan a Meeting** menu item. The Plan a Meeting dialog box appears. (See Figure 3-3.)

5. Click **Add Others** and then select **Add from Address Book** from the drop-down menu. The Select Attendees and Resources dialog box appears.

Figure 3-8
From the Plan a Meeting form you have access to functions like selecting attendees

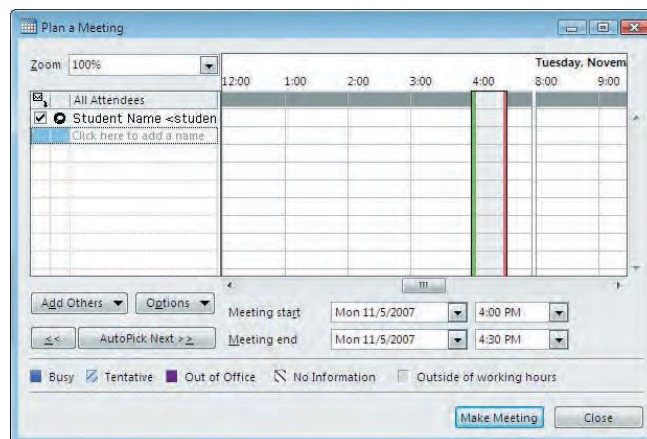
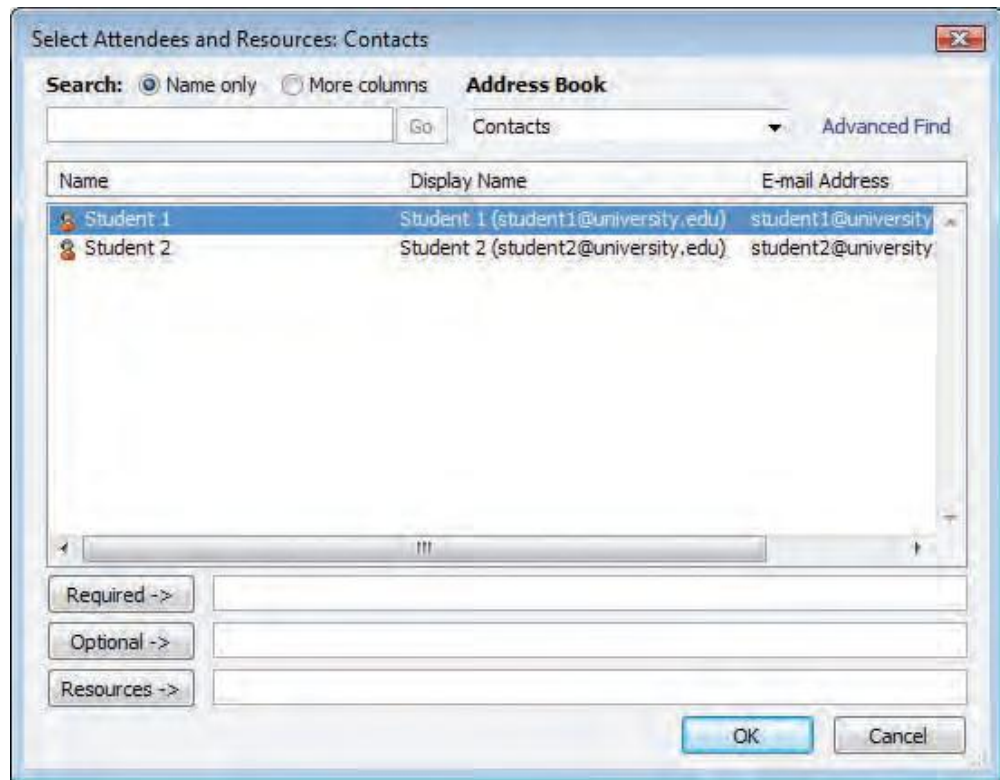


Figure 3-9

The Select Attendees and Resources: Contacts dialog box allows quick destination of contacts in your address book as required, optional or resources for your meetings



6. Select the name of a resource (for example, a conference room) from your contact list.

Resources ->

7. Click the Resources button **Resources ->** at the bottom of the Select Attendees and Resources dialog box to add this item as a resource to your meeting. Resources are much the same as contacts; they have a name and e-mail address and are listed in your Address Book. You can also schedule them in the same way as with attendees.

8. Select the name of an attendee from your contact list.

Required ->

9. Click the Required button **Required ->** at the bottom of the Select Attendees and Resources dialog box to add this item as a Resource to your meeting.

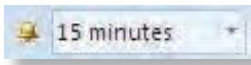
10. Click **OK** and you are returned to the Plan a Meeting dialog. (See Figure 3-3.)

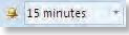
11. Click the Make Meeting button **Make Meeting** in the Plan a Meeting form. The Meeting form appears. The attendees' names appear in the To field automatically.

12. In the Subject field, key **Discuss Expo**.

13. In the Location field, key **My Office**.

14. In the large text box in the lower half of the form, key **Go over major display ideas**.



15. Click the Reminder list box  beside the Reminder bell in the Meeting form and choose **None**.
16. Connect to the Internet and click the Send button  on the Meeting form to send the invitations to the specified recipients.
17. Click the Close button  to close the Plan a Meeting dialog box. The meeting is added to your Appointments Calendar.

Updating, Canceling, and Responding to Meeting Requests

Once a meeting has been scheduled there are several ways to modify or cancel the meeting time. Even the attendees can request these changes to the meeting if you allow them.

Exercise 3-12 CHANGE A MEETING TIME

Planning a meeting involves finding an available time in your schedule, but you may wish to change a meeting time after it has been scheduled.

1. Click the Calendar button  on the Navigation bar. The Calendar view appears.
2. Using the Date Navigator, find the “Paint a still life” appointment created in Exercise 3-5.
3. Click and drag this appointment to another place on your schedule. The appointment is now rescheduled for the new time slot.

Exercise 3-13 CHANGE A MEETING TIME AND SEND AN UPDATE TO ALL ATTENDEES

Planning a meeting involves finding an available time in your schedule, but you may wish to change a meeting time after it has been scheduled.

1. Click the Calendar button  on the Navigation bar. The Calendar view appears.
2. Click the date on the Date Navigator one week from the current date. Notice that the Appointment Calendar automatically displays the selected date. You should now see the appointment created in Exercise 3-2. Select this appointment.
3. Click once on the appointment to select it. The border around the appointment changes to a thick black line to show it is selected.
4. In the menu bar, click the **File** menu and then click the **Open** menu item. From the submenu that appears next to the Open menu item, click **Selected Items**. The Meeting form appears.



5. Set the Start time to one hour earlier. Note that the End time also changes to maintain the original meeting length.
6. Click the Send Update button . The Calendar view appears.

Exercise 3-14 RESPOND TO AN INVITATION

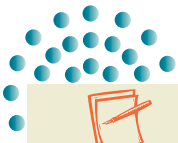
Meeting invitations appear in the recipients' Inboxes. The associated icon for the mail in the Inbox indicates it as a meeting request. You can reply to a meeting request in one of four ways:

- Accept: Outlook creates an item on your Calendar and marks the time as busy.
 - Tentative: Outlook creates an item on your Calendar and marks the time as tentative.
 - Decline: Outlook creates an item in your Deleted Items folder.
1. Click on the Mail button  in the Navigation bar. The Mail view appears.
 2. Click the Send/Receive button  on the Standard toolbar to get your messages from your mail server. Meeting invitations appear in the Inbox like other mail items, but the icon for the item shows it as a meeting. (You might receive more than one meeting invitation, depending on how many of your classmates invited you to their meetings.)
 3. Open the message "Discuss conference topics." The Meeting form appears. You can use the toolbar buttons to accept an invitation, tentatively accept, or decline.
 4. To send your response with no comments, click Send **The Response Now**. Click **OK**.
 5. To include comments with your response, click **Edit The Response Before Sending**.
 6. Type your comments and click **Send**.
 7. To send no response, click **Don't Send A Response**, and click **OK**. The meeting is added to your Calendar.

Exercise 3-15 PROPOSE A NEW MEETING TIME

You may receive a meeting request that you wish to attend, but the current meeting time may not be agreeable. You may want to request another time for the meeting. The meeting organizer can accept or decline your proposal to reschedule the meeting.

1. From the Mail view, open a meeting request in your Inbox. In the open meeting request, on the Message tab, in the Respond group, click **Propose New Time**.

**NOTE**

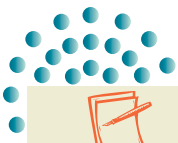
The meeting creator must check Allow New Time Proposals as a Responses option when creating this meeting request for the Propose New Time option to appear.

2. If you are in the Calendar view, open the meeting from the Calendar and on the Appointment tab, in the Respond group, click **Propose New Time**.
3. Click either **Tentative and Propose New Time** or **Decline and Propose New Time**. The Propose New Time dialog box appears.
4. Find a time in the schedule when all invitees are available.
5. Click on **Propose Time**.
6. Click **Send**.

Exercise 3-16 MODIFY ONE INSTANCE OF A RECURRING MEETING

You previously established a meeting that occurs on the second Friday of each month. Two months from now, you may have a conflict that requires rescheduling of the appointment for that month, but you will return to the normal schedule thereafter.

1. Click the Calendar button  on the Navigation bar. The Calendar view appears.
2. Use the Date Navigator to go forward two months from the current date and locate the recurring meeting for the second Friday of each month.
3. Double-click this appointment. The Open Recurring Item dialog box appears.
4. Select the **Open this occurrence** option and click **OK**.
5. Set the Start time to three hours later. Note that the End time also changes to maintain the original meeting length.
6. Click the Save & Close button . The Calendar view appears and the appointment is located three hours later on the schedule.
7. Use the Date Navigator to go forward to the next month from the date you modified and locate the recurring meeting for the second Friday of each month. This appointment is at the originally scheduled time.

**NOTE**

If you wish to modify every instance in the entire series with your changes, you would select Open the series.

Exercise 3-17 ADD A MEETING ATTENDEE AND SEND AN UPDATE ONLY TO NEW ATTENDEES

Sometimes you may want to add someone to a meeting and notify them, but not send too many messages to the group as a whole.

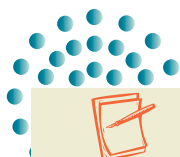
1. Click the Calendar button  on the Navigation bar. The Calendar view appears.

2. Click the date on the Date Navigator one week from the current date. Notice that the Appointment Calendar automatically displays the selected date. You should now see the appointment modified in Exercise 3-8. Select this appointment.
3. Click once on the appointment to select it. The border around the appointment changes to a thick black line to show it is selected.
4. In the menu bar, click the **File** menu and then click the **Open** menu item. From the submenu that appears next to the Open menu item, click **Selected Items**. The Meeting form appears.

**NOTE**

Use an e-mail address from the list of valid e-mail addresses your instructor has provided you.

5. Click the Scheduling button  in the Meeting form toolbar. The Meeting form will change to show the Attendees list and the Scheduling pane.
6. In the All Attendees list, the next row under the one where you keyed Classmate 3 now contains the text "Click here to add a name." Click on this row and key in your fourth invitee, **Classmate 4 <[name]@[ISP]>**.
7. Connect to the Internet and click the Send button  on the Meeting form. The Send Update to Attendees dialog box appears.
8. Click the **Send updates only to added or deleted attendees** option and click **OK**. The Calendar view appears.

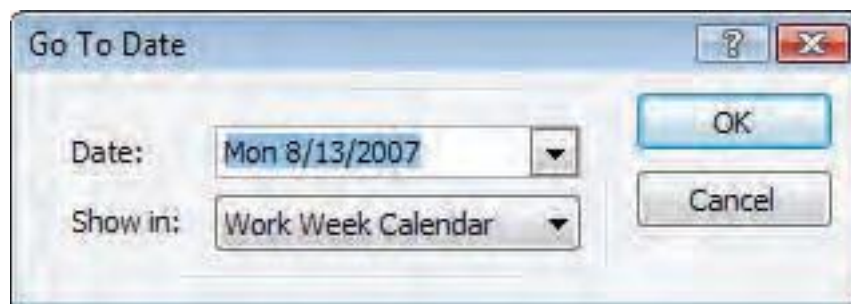
Exercise 3-18**CANCEL A MEETING AND NOTIFY ATTENDEES****NOTE**

To quickly jump to a date and view a date other than today, use the key combination **Ctrl+G** to get the Go To Date dialog box.

At some point you may want to cancel a meeting that you have scheduled.

1. Click the Calendar button  on the Navigation bar. The Calendar view appears.
2. Click the Today button  on the Standard toolbar.

Figure 3-10
The Go To Date dialog box allows you to specify a date and a view for the Appointments Calendar.



3. Click the date on the Date Navigator one week from the current date. Notice that the Appointment Calendar automatically displays the selected date. The Appointment Calendar shows the appointment created in Exercise 3-2.

4. Click once on the appointment to select it. The border around the appointment changes to a thick black line to show it is selected.
5. In the menu bar, click the **File** menu and then click the **Open** menu item. From the submenu that appears next to the Open menu item, click **Selected Items**. The Meeting form appears.
6. Click the Cancel Meeting button  in the Actions tab of the Meeting form toolbar. The Meeting form will change to show a Send Cancellation button.
7. Click the Send Cancellation button . The Meeting form will close and the Calendar view will appear.

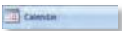
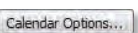


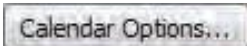
Customizing Calendar Settings

You can customize the Calendar to work better for you in many ways. You can change the way the Calendar displays time intervals, the way that it works with time zones, and you can add predefined holidays.

Exercise 3-19 DEFINE YOUR WORK WEEK

The Calendar allows you to define your normal work week in terms of the days it contains and when it starts, the normal start and end times of your working day, and what you consider the first week of the year.

1. Click the Calendar button  on the Navigation bar. The Calendar view appears.
2. In the menu bar, click the **Tools** menu and then click the **Options** menu item. The Options dialog box appears.
3. Click the Calendar Options button  in the Options dialog box. The Calendar Options dialog box appears.
4. Put checks in the boxes next to the days of the week that are your workdays and clear the checks from the boxes next to the days of the week that are not workdays.
5. Click the down arrow next to First Day of the Week to select the day of the week you want considered as the first day of the week if it is other than Sunday. The weeks in the Date Navigator will begin with this day.
6. Click the down arrow next to First Week of Year to choose a definition for the first week of the year if it does not begin January 1. If you turn on week numbering, week number 1 is defined in this manner.
7. Click the down arrow next to Start Time to choose the normal start time for your working day if it is other than 8:00 A.M.
8. Click the down arrow next to End Time to choose the normal end time for your working day if it is other than 5:00 P.M. In the Day and Week views, non-working hours are blue, while working hours are pale blue by default. You can set other options from this panel that affect the colors, prompts, and behaviors of your Calendar.



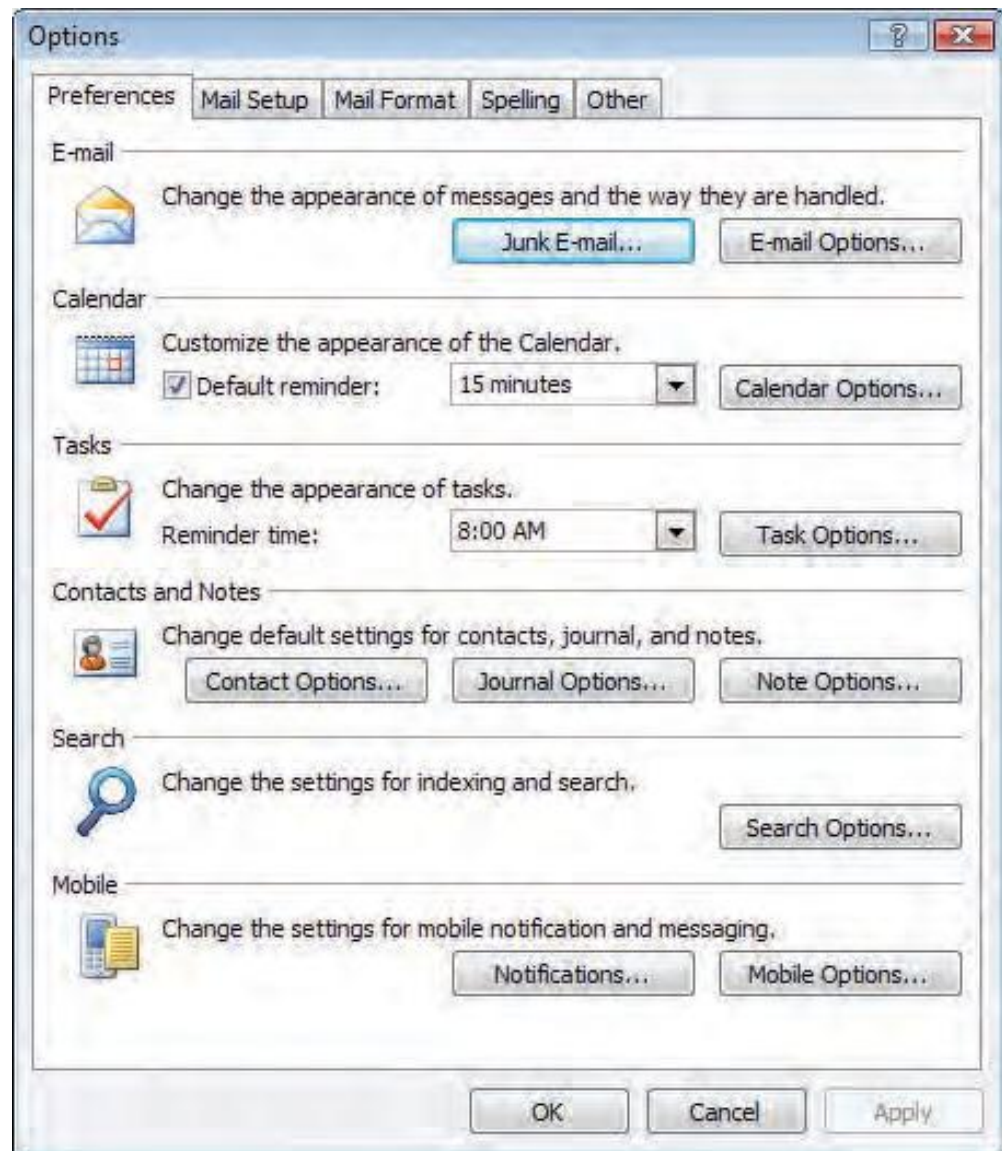
- Click the **OK** button to apply your settings to your Calendar. The modified Calendar view appears.

Exercise 3-20 SETTING TIME ZONES

You can choose up to two time zones to display. You can define and name your current time zone, as well as an additional one, if you choose. This is helpful for moving appointments if you have moved to a new time zone.

- Click the Calendar button  on the Navigation bar. The Calendar view appears.
- In the menu bar, click the **Tools** menu and then click the **Options** menu item. The Options dialog box appears.

Figure 3-11
The Options dialog box is for setting options in all of the Outlook modules



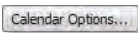
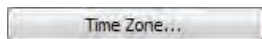
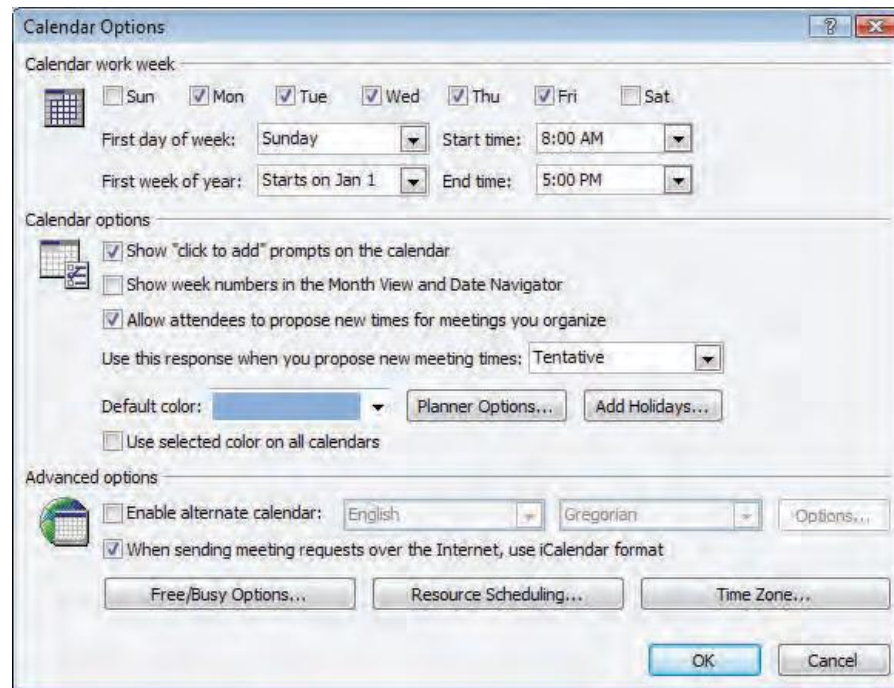
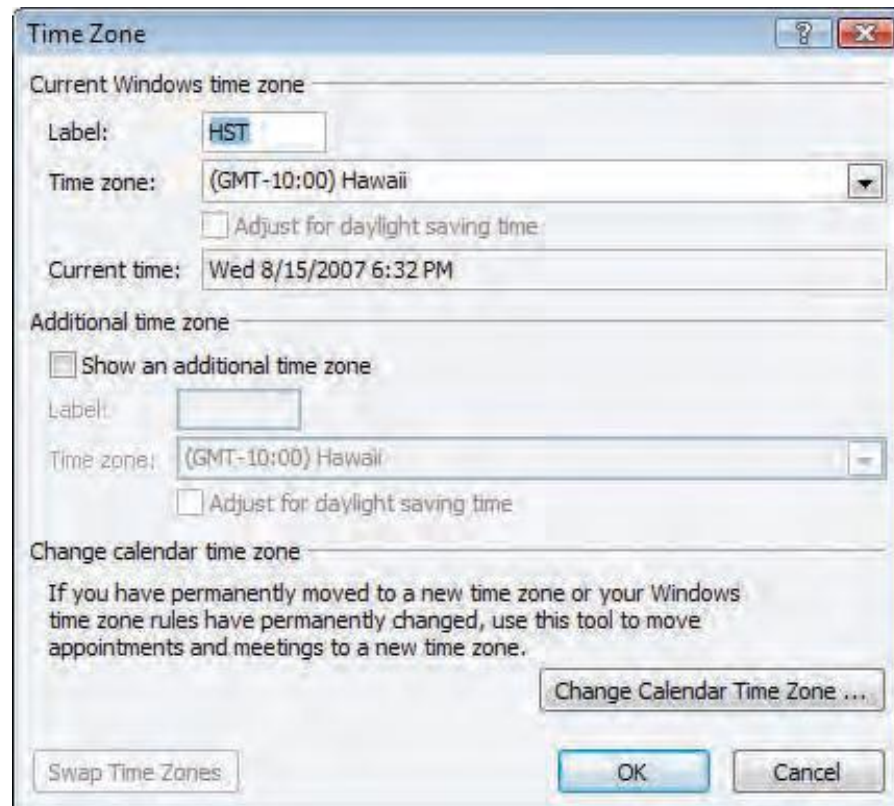
- Click the Calendar Options button  in the Options dialog box. The Calendar Options dialog box appears.

Figure 3-12
The Calendar Options dialog box is where you set options, such as defining your work week, time zone, and holidays.

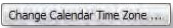
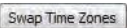


4. Click the Time Zone button  in the Calendar Options dialog box. The Time Zone dialog box appears.

Figure 3-13
The Time Zone dialog box allows you to set up an alternate time zone for your Calendar



5. If you are going to use two time zones, click in the Label field, and type a name to identify the current time zone appearing in the Time Zone drop-down list.

6. Click the checkbox next to Show An Additional Time Zone to add a second time zone.
7. Click in the Label text box, and type a name identifying this second time zone.
8. Click the down arrow for the Time Zone list box to display a list of time zones from which you can choose.
9. Click the checkbox next to Adjust For Daylight Saving Time if it applies to either time zone you have selected.
10. Click the Change Calendar Time Zone button  to switch time zones, if you have permanently moved to a new time zone.
11. Click the Swap Time Zones button  to swap which time zone is on the left.
12. Click the **OK** button to apply your settings and close the Time Zone dialog box.
13. Click the **OK** button to close the Calendar Options dialog box and click the **OK** button again to close the Outlook Options dialog box. Both times zones appear on your Calendar grid.

Change Calendar Time Zone...

Swap Time Zones

Exercise 3-21 ADD PREDEFINED HOLIDAYS TO THE CALENDAR

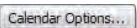
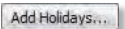
You can set up your Calendar to display the holidays that you observe.

1. Click the Calendar button  on the Navigation bar. The Calendar view appears.
2. In the menu bar, click the **Tools** menu and then click the **Options** menu item. The Options dialog box appears.

Figure 3-14

The Add Holidays to Calendar dialog box allows selection of various holiday sets for addition to your Calendar



3. Click the Calendar Options button  in the Options dialog box. The Calendar Options dialog box appears.
4. Click the Add Holidays button  in the Calendar Options dialog box. The Add Holidays to Calendar dialog box appears.

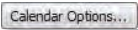
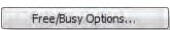
5. Click the checkbox for each of the country and/or religious holidays that you want added to your Calendar.
6. Click **OK** to close the Add Holidays to Calendar dialog box. A dialog box appears briefly showing that the holidays are being added.
7. Click the **OK** button to apply your settings and close the Time Zone dialog box.
8. Click the **OK** button to close the Calendar Options dialog box and click the **OK** button again to close the Outlook Options dialog box.

Sharing Your Calendar with Others

There are several ways to share your Calendar with others. You can send a Calendar via e-mail or share your default Microsoft Exchange Calendar with others on the same server. As you are choosing the Calendar to send, you can also set your privacy settings to better suit your needs.

Exercise 3-22 CONFIGURE FREE/BUSY PRIVACY SETTINGS

If you and your coworkers are part of a Microsoft Exchange network, are willing to share your schedules over the Internet, or can all access a common server, you can store your free/busy times and make them available to each other to schedule meetings and other times together. In this case, requests for meetings will be handled automatically. The request will be matched against the group's free/busy schedule and meetings will be scheduled at available times.

1. To set up the free/busy options in your Calendar, click the Calendar button  on the Navigation bar. The Calendar view appears.
2. In the menu bar, click the **Tools** menu and then click the **Options** menu item. The Options dialog box appears.
3. Click the Calendar Options button  in the Options dialog box. The Calendar Options dialog box appears.
4. Click the Free/Busy Options button  in the Calendar Options dialog box. The Free/Busy Options dialog box appears.

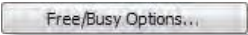
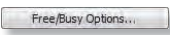
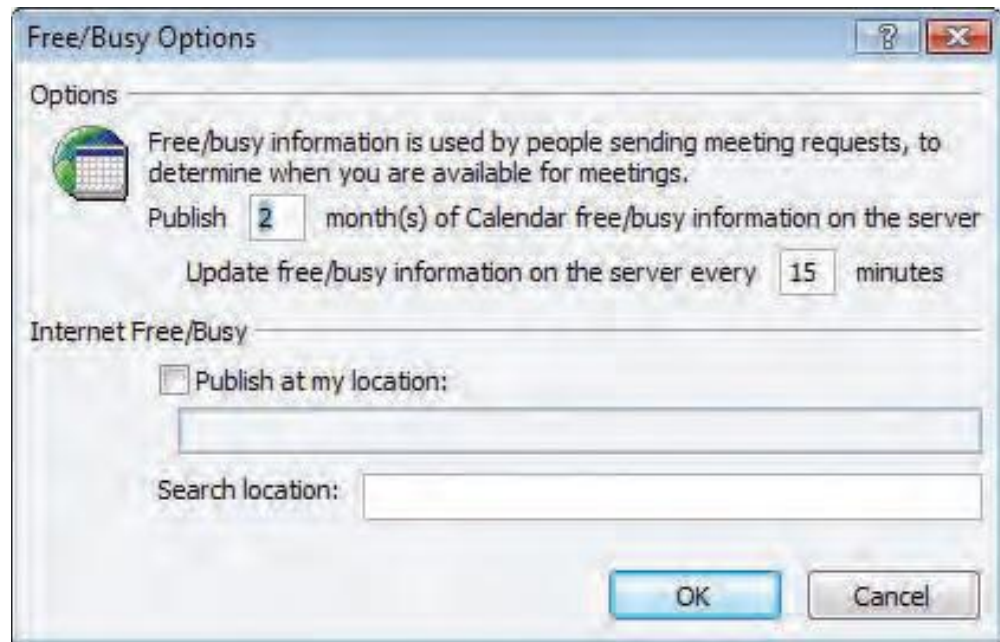
Free/Busy Options...Free/Busy Options...

Figure 3-15

The Free/Busy Options dialog box allows you to set how far into the future your schedule is revealed when others check your free time.



5. In the Publish field, type the number of months of free/busy information you want to store on the server.
6. In the Update Free/Busy Information field, enter how often you want the server to update your information.
7. Click the checkbox next to Publish at my location, and enter the URL of your Internet Calendar if that applies to your situation.
8. In the Search location field, type the URL of the servers on which you want Outlook to find the free/busy information of others.
9. Click **OK** to return to the Calendar Options dialog box.

Exercise 3-23

SHARE YOUR CALENDAR WITH OTHER OFFICE OUTLOOK 2007 USERS ON YOUR NETWORK

If you and your coworkers are connected to a Microsoft Exchange server, you can share your Calendars with each other.

1. On the Navigation bar, in the Calendar area, click the **Share My Calendar** link. The E-mail form appears.
2. In the **To** field, type the name of the person to whom you are granting access to your calendar.
3. In the **Subject** field, type a subject for your e-mail.
4. Click the checkbox next to Allow Recipient To View Your Calendar.

5. Click the checkbox next to Request Permission To View Recipient's Calendar, if you want to request access to their Calendar as well.
6. In the e-mail body text area, type any additional information.
7. Click **Send**.
8. A confirmation dialog box will appear. If all of the information appears correct, click **OK** to close the dialog box.

Exercise 3-24 SEND YOUR CALENDAR INFORMATION IN AN E-MAIL MESSAGE

You can send any Calendar you own to another in the body of an e-mail message. The person receiving the Calendar will see a snapshot of your Calendar at a given moment in time. If the recipient uses Outlook 2007, he or she can open the Calendar snapshot as an Outlook Calendar and display it either side-by-side or as an overlay with any other Calendars. The downside of using a Calendar snapshot is, of course, that the Calendar you send is not automatically updated when you make changes. If the e-mail recipient needs a regularly updated Calendar, consider other publishing options, such as sharing via an Exchange server, if one is available at your office.

1. On the Navigation bar, in the Calendar area, click the **Send A Calendar Via E-mail** link. The Send a Calendar via E-mail dialog box appears.

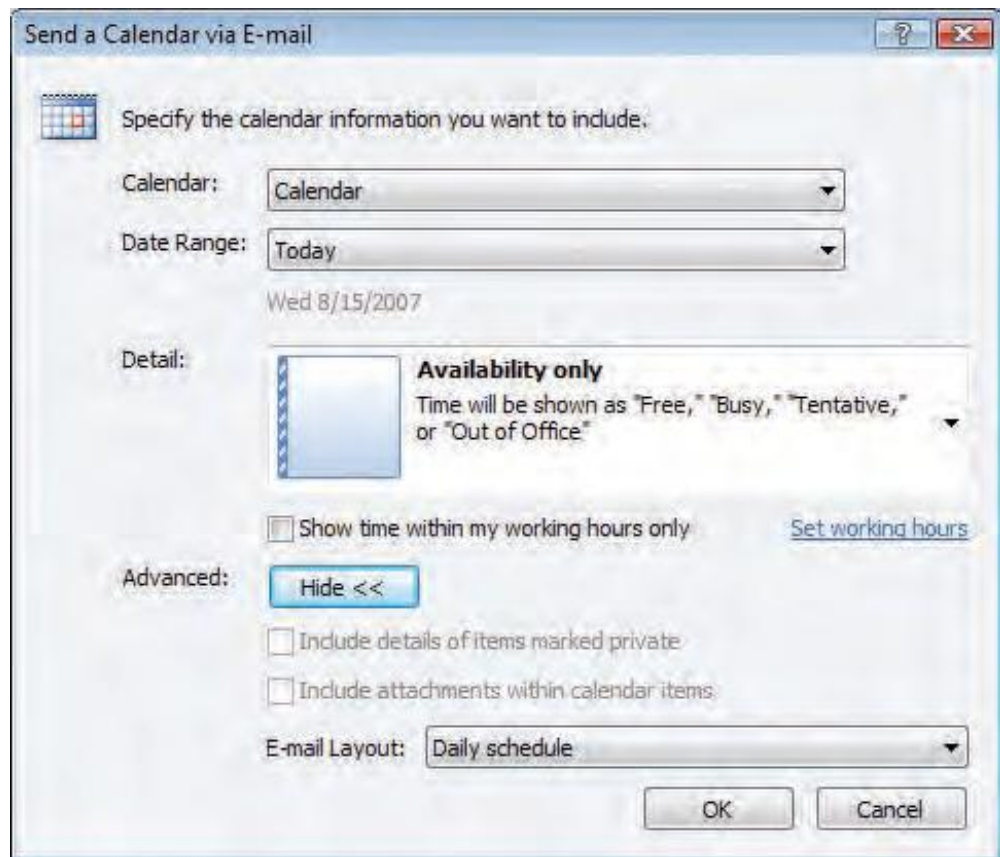
Figure 3-16

The Send a Calendar via E-mail dialog box allows you to select the kind of Calendar information that will be sent in your e-mail



2. Click the arrow on the Calendar pop-up menu, and choose the Calendar that you want to e-mail.
3. Click the arrow on the Date Range pop-up menu, and choose the time period for which you want to send the Calendar.
4. Click the arrow on the Detail pop-up menu, and choose the type of Calendar information you want to send. You can choose Show Availability only, Limited Details, or Full Details.
5. If your choice is Availability Only, click the checkbox labeled Show Time Within My Working Hours Only, if that is what you want.
6. Click the **Set working hours** link to display the Calendar Options dialog box and change your working hours. Close the Calendar Options dialog box if you opened it. (See Figure 3-12.)
7. For Advanced, click the Show button  and if you want these options, check the checkboxes for **Include Details Of Items Marked Private** and/or **Include Attachments**.

Figure 3-17
The Send a Calendar via E-mail dialog box with Advanced options showing



8. Click the arrow on the E-mail Layout pop-up menu, and choose either the **Daily Schedule** or **List Of Events** format.
9. Click **OK** to close the dialog box.

10. In the **To** field, type the e-mail address of the person to whom you are sending to your Calendar.
11. Click the Send button .

Exercise 3-25 PUBLISH YOUR CALENDAR INFORMATION TO OFFICE ONLINE

Microsoft offers a publishing service for your Calendars. This method does not require Microsoft Exchange for either the user or the owner of the Calendar. The first time you use the service, you must register using your Microsoft Windows Live ID account. If you don't yet have an account, you may follow the instructions on the screen to obtain one for free.

1. On the Navigation bar, in the Calendar area, click the **Publish My Calendar** link. Go through the registration procedure, if needed. The Publish Calendar To Microsoft Office Online dialog box appears.

Figure 3-18
The Microsoft Office
Online Registration
assistant

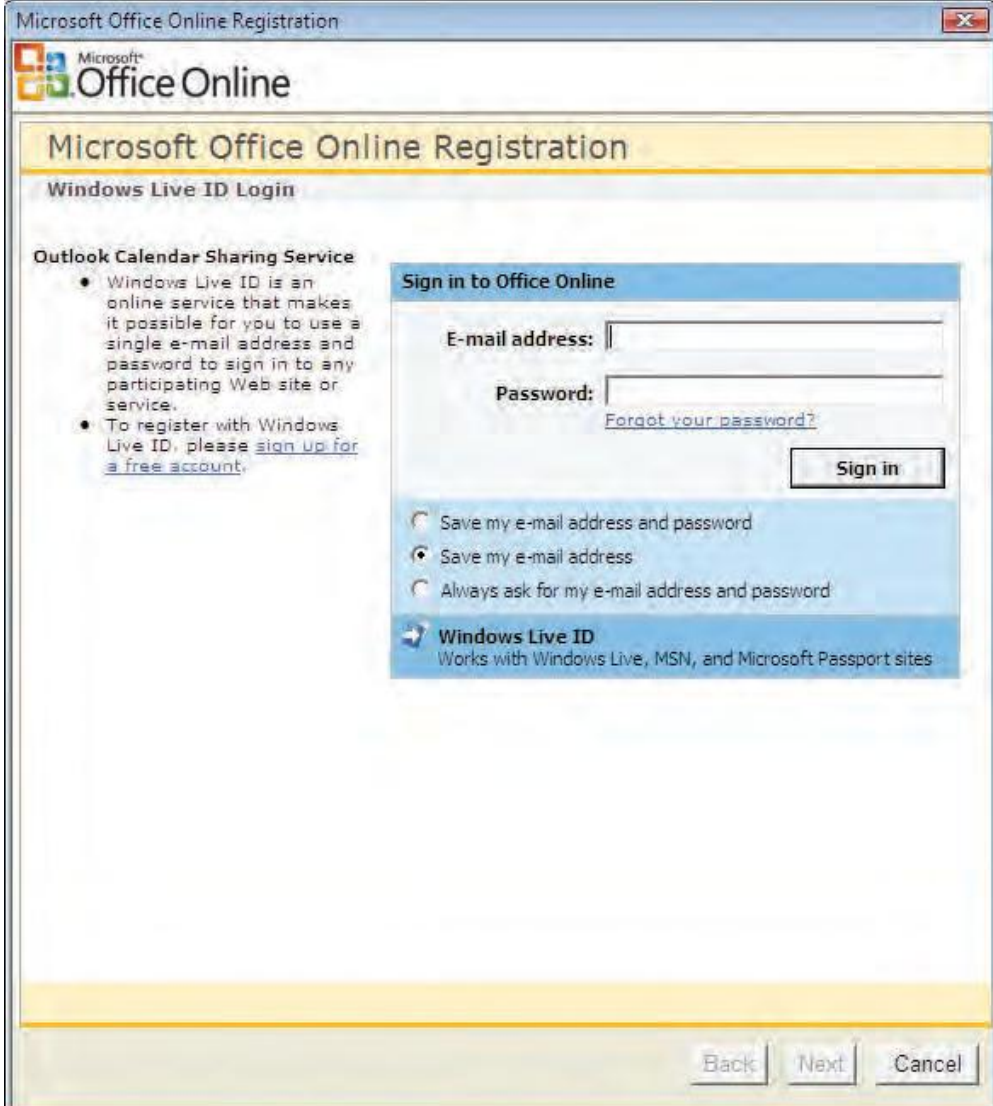
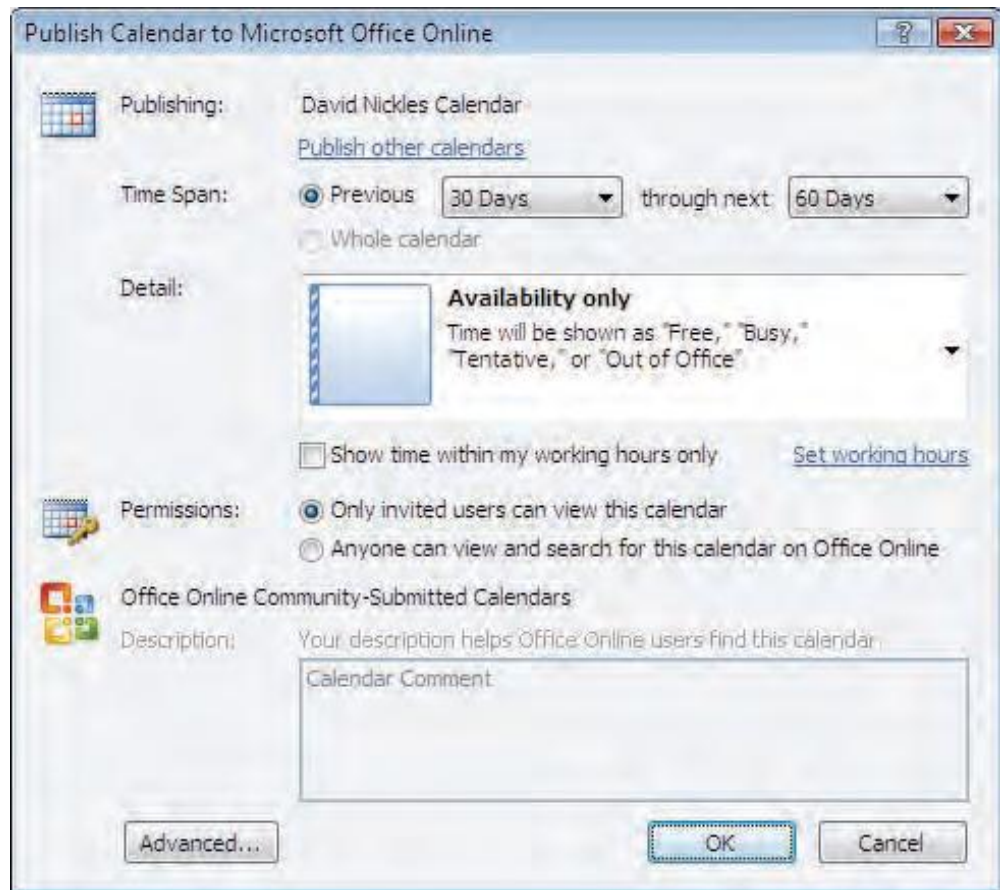
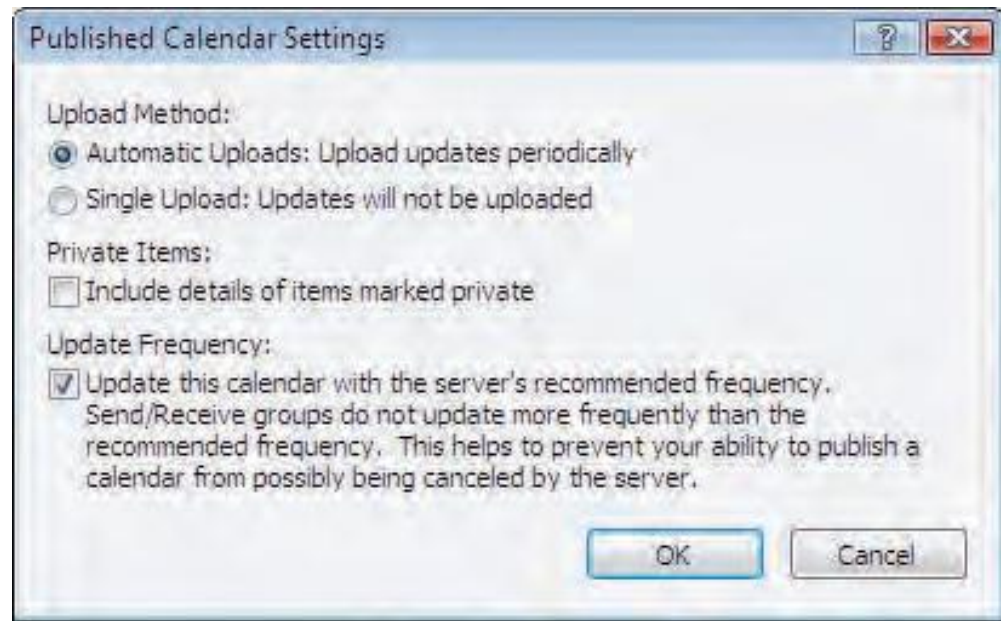


Figure 3-19
The Publish Calendar to Microsoft Office Online dialog box allows you to select what kind of information in your Calendar is published online

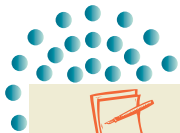


2. Click the arrow on the **Detail** pop-up menu, and choose the type of Calendar information you want to send. You can choose Show Availability only, Limited Details, or Full Details.
3. If your choice is Availability Only, click the checkbox labeled Show Time Within My Working Hours Only if that is what you want.
4. Click the **Set working hours** link to display the Calendar Options dialog box (see Figure 3-12) and change your working hours. Close the Calendar Options dialog box if you opened it.
5. Under Permissions, click either **Only invited users can view this calendar** if you want to allow access to your Calendar by invitation only. Click **Anyone can view and search for this calendar on Office Online** if you want to share your Calendar with anyone on the Internet.
6. Click the Advanced button **Advanced...** to show the Published Calendar Settings dialog box.

Figure 3-20
The Published Calendar Settings dialog box allows you to set the frequency, upload pattern, and security for your online Calendar



7. Under Upload Method, click **Automatic Uploads** if you want Outlook to periodically update your published Calendar automatically. Click **Single Upload** if you do not want to have your Calendar updated automatically.



NOTE

If you choose Availability Only in the Detail section of the dialog box, then the Private Items section will not appear. For all other Detail choices, it appears.

8. Under Private Items, click the checkboxes labeled Include Details Of Items Marked Private.
9. Under Update Frequency, check **Update this Calendar** to use the server's recommended frequency for updates.
10. Click **OK** to close the Published Calendar Settings dialog box.
11. Click **OK** to close the Published Calendar to Microsoft Online dialog box and publish your Calendar.
12. After your Calendar has been successfully published, a dialog box will appear asking if you wish to create an e-mail announcing your Calendar's availability. Click **Yes** to create the e-mail or click **No** to close the dialog box.

Viewing Other Calendars

Calendars are available on the Web through Internet standards and within companies via Microsoft Exchange servers. There are many ways in which you can view and integrate other Calendars into your Calendar view to make your scheduling more efficient. You can choose multiple Calendars from the Navigation pane for view and you can switch from the standard side-by-side view to the overlay view.

Exercise 3-26

VIEW A CALENDAR SHARED BY ANOTHER OFFICE OUTLOOK 2007 USER ON YOUR NETWORK

If your business is using a Microsoft Exchange server and you have an account, you can quickly view another person's shared default Microsoft Exchange Calendar from the Navigation pane.



NOTE

You may need to request permission to view the Calendar from its owner. If so, Outlook allows you to do so through a sharing request e-mail message form. You can also allow access to your default Calendar in this request.



NOTE

It is easy to schedule a meeting with those whose Calendars you can view. In the Actions menu, choose **New Meeting Request With**, and then click **All** or selectively choose the names from the list.

1. On the Navigation bar, in the Calendar area, click the **Open a Shared Calendar** link. The Open a Shared Calendar dialog box appears.
2. In the **Name** field, type the name of the person's Calendar you wish to view, or click the **Name** button and select a name from the Address Book dialog box.
3. Click **OK** to close the dialog box. The shared Calendar appears next to any Calendar that is already in the view. The shared Calendar will also appear in the Navigation pane for easy access the next time you want to view it.
4. To remove a Calendar from the Other Calendars list, right-click the Calendar, and then click **Remove From Other Calendars**.

Exercise 3-27

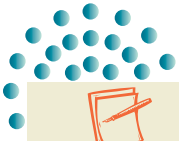
SUBSCRIBE TO AN INTERNET CALENDAR

Internet Calendars are Calendars that are shared through the Internet. These Calendars are based on an international Internet standard, or open standard, that allows Calendar information to be exchanged between people regardless of the application they are using to create and view Calendars. Internet Calendars use the iCalendar format and the .ics filename extension.

One type of Internet Calendars is the Internet Calendar Subscription. It is updated automatically and can be downloaded and viewed in Outlook.

These Calendars are usually hosted on Web sites that are dedicated to Calendars, but can also be found on a given organization's Web site. You can click a link to download and subscribe to the Calendar, or someone can send you a link to download the Internet Subscription Calendar in an e-mail message. This link is an Internet Web address that begins with the protocol indicator `webcal://` instead of `http://`, and ends with a filename that has the .ics file extension.

1. Connect to the Internet and then on the Navigation bar, in the Calendar area, click the **Search Calendars Online** link. Your Web browser opens to a search page for finding online Calendars.
2. From the Microsoft Calendar Search page, from a Calendars hosting Web site, or from an e-mail sent to you, click the link for the Internet Calendar Subscription.

**NOTE**

You may be prompted to permit the opening of the hyperlink. You should click Yes only if you know and trust the validity of the linked Calendar.

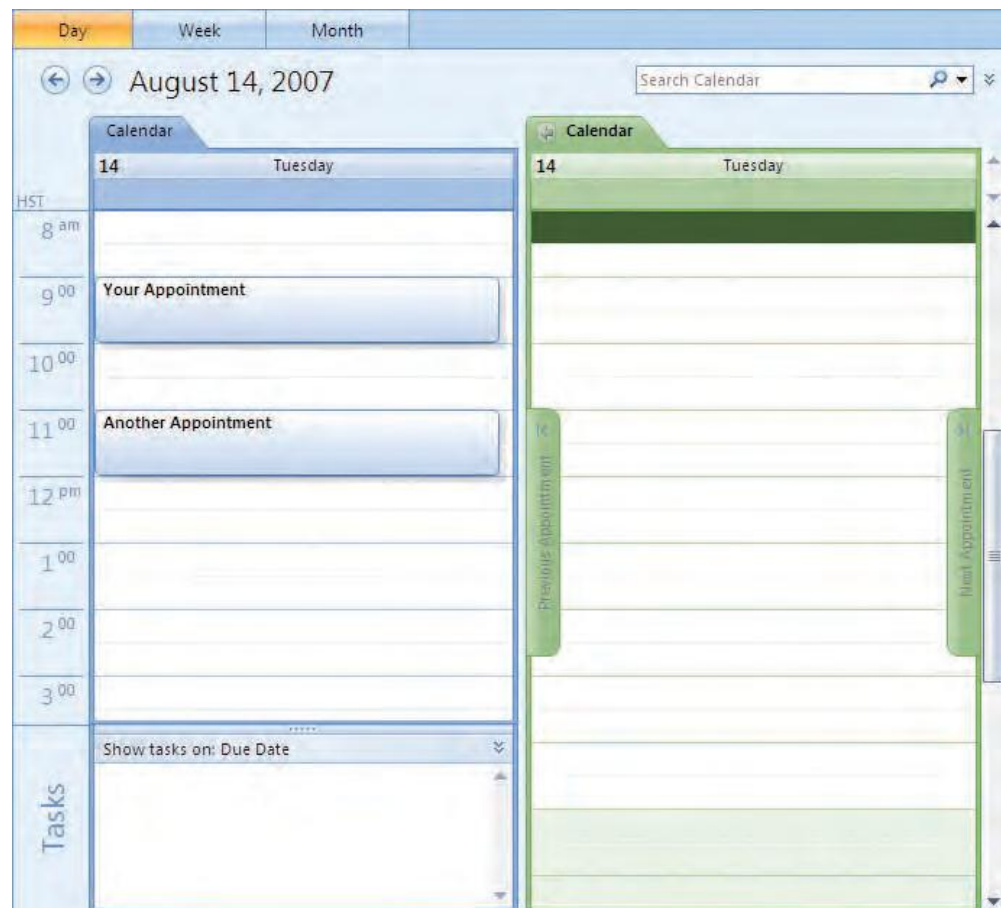
3. A dialog box appears, asking you to add this Internet Calendar to Outlook and subscribe to updates. Click **Yes**. The Internet Calendar will open in the side-by-side view in the Outlook Calendar and is added to the Navigation pane in the Calendar view under the Other Calendars pane. Outlook will check periodically for any updates made by the Calendar publisher.

Exercise 3-28 VIEW MULTIPLE CALENDARS IN OVERLAY MODE

You can view a Calendar in a new window, side-by-side, or in a overlay mode that stacks transparent Calendars over each other to facilitate finding a common free time slot on several different Calendars.

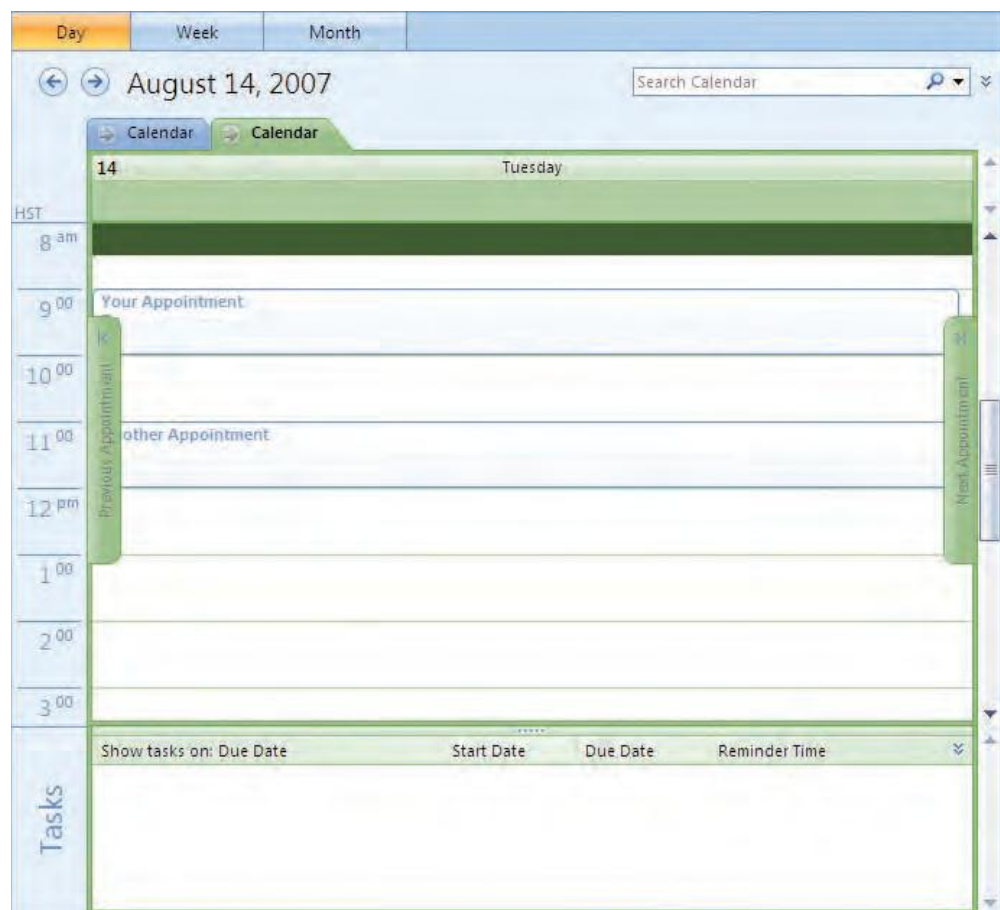
1. To open several Calendars side-by-side, click the Calendar button  on the Navigation bar. The Calendar view appears.
2. On the Navigation bar, in the Calendar area, click to check the checkboxes for each Calendar you want view. The Calendars will display side-by-side to each other in your Calendar grid.

Figure 3-21
Viewing multiple Appointment Calendars in side-by-side mode allows comparison and separation of Calendar events



3. To overlay your Calendars, on the tab of each Calendar you want to stack, click the left-pointing arrow . The Calendars are overlaid with transparency, allowing you to easily see any dates and times that may be free on all Calendars.
4. To undo the overlay stack, click the right-pointing arrow  on the tab of each Calendar. The Calendars are once again displayed in the side-by-side view.

Figure 3-22
Viewing multiple Appointment Calendars in overlay mode allows efficient comparison of the intersection of free and active time in Calendars



Exercise 3-29 PRINT YOUR CALENDAR

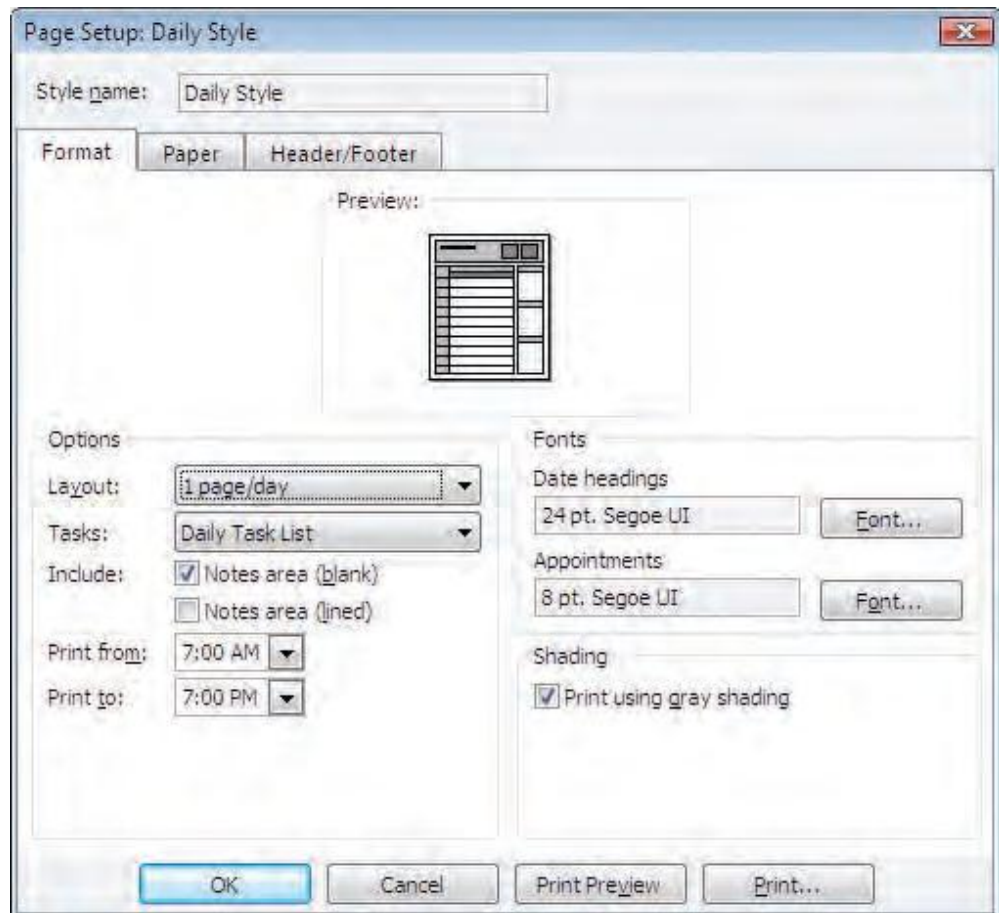
Once you have your Calendar in a form you wish to share, you may want to publish it physically to take with you or to post on a door or bulletin board. You can even use this physical copy as a draft to jot new appointments when you are away from your computer. Outlook provides a number of printed formats to fit your needs.

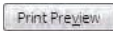
1. Click the Calendar button  on the Navigation bar. The Calendar view appears.
2. On the date on the Date Navigator, select the day, week, or month you wish to print.

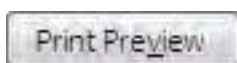
3. In the Appointments Calendar, choose the Day, Week, or Month tab.
4. In the menu bar, click the **File** menu and then click the **Page Setup** submenu. In the Page Setup submenu, choose the layout style for your printout. Your choices are determined by the Calendar view you have chosen. Figure 3-23 shows an example of the daily style and the options that are available for that style.

Figure 3-23

You can flexibly set many options for the print preferences from the Page Setup dialog box including layout style, formatting, paper types, and more



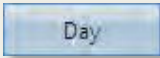
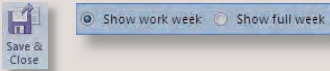
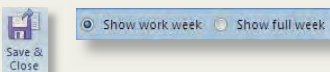
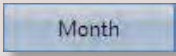
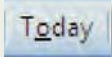
5. Click the **Format** tab, and make any changes in the Options and Fonts sections.
6. Click the **Paper** tab and make any changes to set up your paper preferences.
7. Click the **Header/Footer** tab to enter a header and/or footer for the pages of your Calendar.
8. When you have all your print settings specified, click the Print Preview button  to see an on-screen preview of how your printed Calendar will look.
9. Click Print  to print your Calendar.





Lesson 3 Summary

- You can create an appointment, meeting, or event from scratch, from an e-mail you received, or from a task in your Calendar.
- You can send requests to invite attendees to a meeting you scheduled.
- You can use smart scheduling to find a free time for a meeting in group members' schedules.
- You can track and manage responses to your meeting requests.
- You can schedule meeting resources.
- You can modify scheduled meetings by changing or proposing new times, inviting someone new, or accepting requested changes from your invitees.
- You can cancel scheduled meetings and send out notifications to the invitees.
- You can customize your Calendar to adjust your work week, your recognized holidays, and the time zones in which you are working or scheduling.
- You can share your Calendar and view others' Calendars through an Outlook Exchange server, through Office Online, or even e-mail.
- You can configure your Calendar privacy settings to control what others receive and see in your Calendar.
- You can view multiple Calendars at the same time, either side-by-side or as transparent overlays.

LESSON 3		Command Summary	
Feature	Button	Task Path	Keyboard
Day View		View, Week	Ctrl + Alt + 1
Work Week View		View, Work Week	Ctrl + Alt + 2
Full Week View		View, Week	Ctrl + Alt + 3
Month View		View, Month	Ctrl + Alt + 4
New Appointment		File, New	Ctrl + N
Open Selected Appointment		File, Open, Selected Items	Ctrl + O
Go to Today		Go, Today	

Concepts Review

True/False Questions

Each of the following statements is either true or false. Indicate your choice by circling T or F.

- T F 1. By default, the Appointment Calendar divides the workday into one-hour segments.
- T F 2. If you create an appointment from a task, the body of the appointment will automatically contain the task information.
- T F 3. The Week view allows you to toggle the display of work week or full week at the top of the Appointment Calendar.
- T F 4. The current date appears in bold in the Date Navigator.
- T F 5. If a date contains a scheduled appointment, that date appears in bold in the Date Navigator.
- T F 6. By default, the reminder option is selected in a new appointment.
- T F 7. You must open an appointment before you can reschedule it.
- T F 8. The TaskPad is displayed below the Appointments Calendar in the Calendar view.
- T F 9. You can subscribe to Internet Calendars by clicking a subscription link on a Web page.
- T F 10. You cannot view more than one Calendar at the same time.

Short Answer Questions

Write the correct answer in the space provided.

- 1. When you select the Week view, how does the Date Navigator change to reflect this?

- 2. What surrounds an appointment when you select it in your Appointments Calendar?

- 3. What do you call appointments that occur repeatedly?

- 4. How can you view Internet Calendars from the Web?

- 5. If you move from Los Angeles to New York and must adjust your scheduled meetings, how can Outlook help?

6. What is the file extension for Internet Calendar filenames?

7. How do you mark an appointment as private?

8. How can you quickly e-mail someone just when you are available over the next week?

Critical Thinking

Answer these questions on a separate page. There are no right or wrong answers. Support your answers with examples from your own experience, if possible.

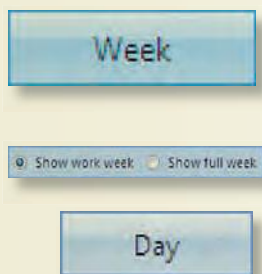
1. Why would it be useful to create and maintain separate business and personal Calendars?
2. If you are conducting international business, how could the Add Holidays feature help you in scheduling meetings and events?
3. When would private appointments be useful in your schedule?

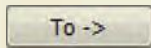
Skills Review

Exercise 3-30

Navigate in the Calendar, schedule an appointment, and print an appointment.

1. Open the Calendar by clicking the Calendar shortcut in the Navigation pane.
2. Change Calendar Viewing options by following these steps:
 - a. To display the Week view, click the Week tab  at the top of the Appointments Calendar, or press **Ctrl+Alt+3**.
 - b. Display the Work Week view by clicking the Work Week radio button  at the top of the Appointments Calendar.
 - c. Display the Day view by clicking the Day tab  at the top of the Appointments Calendar.
 - d. Click the date in the Date Navigator that is one week from the current date.
3. Schedule an appointment by following these steps:
 - a. Choose **File, New Appointment** from the menu, or press **Ctrl+N**.
 - b. In the Subject text box, key **Beginning of session orientation**.
 - c. In the Location field, key **Conference Room**.





- d. Set the date for the start time by clicking the **Date** list box. Select a date roughly one week from the current date, if that date is not already selected.
- e. Set the time for the start time by clicking the **Time** list box and choosing **1:00 PM**.
- f. Clear the reminder, by clicking the **Reminder** list box and choosing **None**.
- g. Click on the Save & Close button  on the Appointment Form.
4. Print the appointment by following these steps:
 - a. Click the date in the Date Navigator of the appointment you scheduled in the previous step.
 - b. In the Appointments Calendar, double-click the “Beginning of session orientation” appointment. The Appointment form opens with your appointment.
 - c. Choose the Office button  on the Appointment form to display the Office menu.
 - d. Choose **Print, Print** from the menu.
 - e. Click on the **OK** button.
 - f. Close the appointment without saving.

Exercise 3-31

Schedule an event, add a reminder, and print the Calendar.



1. Open the Calendar by clicking the Calendar pane in the Navigation pane.
2. Display the Calendar in Full Week view by clicking the **Week** tab and then clicking the **Full Week** radio button at the top of the Appointments Calendar.
3. Delete any existing appointments or events for this week by following these steps:
 - a. Select the appointment or event.
 - b. Delete the appointment or event by clicking the Delete button  on the Standard toolbar.
4. Create a new event by following these steps:
 - a. Choose **Actions, New All Day Event** from the menu.
 - b. In the Subject text box, key **Family Reunion**.
 - c. Set the date for the start time by clicking the **Date** list box. Select a date on the next Saturday from the current date, if that date is not already selected.
 - d. Click the **Reminder** list box and select a reminder time of 1 day.
 - e. Click on the **Save & Close** button on the Event Form.
5. Print a Calendar by following these steps:
 - a. Choose **File, Page Setup, Weekly Style** from the menu.
 - b. Click the **Header/Footer** tab and replace the User Name in the footer with your name if it is not already displayed.
 - c. Click the **Print** button.
 - d. Click the **OK** button.
6. Display the Calendar in Day view.

Lesson Applications

Exercise 3-32

Change the Calendar view, schedule appointments, set reminders, and print the Calendar.

Adam Parker has asked you to schedule time to work on the feedback he's received from team managers in the local little league. You want to be sure you keep track of the appointments, because everyone has busy schedules and they are already volunteering their time.

1. Display your Calendar view if it is not already displayed, and change the view to Work Week view.
2. Create a new appointment with the subject **Go over team managers input**. Schedule it roughly two weeks from the current date, but do not schedule any meetings on a weekend or a Monday. Make it an hour-long appointment, starting after 3 P.M. (Ignore any warnings that might appear, informing you of conflicts with other appointments.)
3. Key the location of the appointment as **Adam's office**. In the body of the Appointment form, key **Find out which suggestions Adam thinks are most important**.
4. Set a reminder to go off one hour before the appointment.
5. Schedule an hour appointment at 10 A.M. the day before the appointment you just scheduled with Adam. (Remember the previous scheduling rules.)
6. Key the subject of the appointment as **Get final input from Marion**. Key the location as **Marion's office**, and set a reminder to go off one hour before the appointment.
7. Display the week for the appointments that you created in the previous steps. Delete any other appointments or events for this week that were not entered during this exercise, and then print the Calendar in Weekly Style. Include your name as a centered header
8. Display the Calendar in Day view for the current date.

Exercise 3-33

Schedule a recurring appointment and an event, use reminders, and print the Calendar.

Your manager has asked you to coordinate the annual departmental staff meeting. You'll need to schedule the event and time in your Calendar for preparation.

1. Using the Date Navigator, find a week in the coming month in which there are no appointments or events scheduled, or select a week and delete any existing appointments and events for that week. Schedule an appointment on the Monday of that week.

2. Key the subject of the appointment as **Preparation for annual staff meeting**, and start the appointment at 2 P.M. and end it at 5 P.M. Specify the location as **My office**.
3. Set the reminder to 30 minutes, and in the body of the appointment, key **Do not schedule any other appointments for this time!**
4. Make this a recurring appointment, using a daily recurrence pattern, with a range of recurrence that is to end after four occurrences.
5. On the Friday of that same week, schedule an all-day event. For the subject of the event, key **Annual staff meeting**. For the location, key **Conference center**.
6. Set the reminder to one day, and set the **Show as** option as **Busy**.
7. Print the Calendar for the week you scheduled the appointment and event, using a Weekly Style. Add your name as a centered header, if it does not appear in the header already.

Exercise 3-34 ♦ Challenge Yourself

Schedule an appointment, schedule an event, add reminders, and print the Calendar.

You have been asked to accompany your Research Advisor to an important conference to present a paper. You need to schedule appointments in preparation for the trip.

1. Use the Date Navigator to find a week in the period of roughly two months from the current month in which there are no appointments or events scheduled, or select a week and delete any existing appointments and events for that week.
2. On Monday of that week, schedule an appointment, keying the subject **Discuss conference travel arrangements**. Make the location of the appointment as **Daniel's office**, starting at 10 A.M. and ending at 11:00 A.M. Have the reminder go off 30 minutes prior to the appointment.
3. Schedule an all day event for Friday of that week, keying the subject as **Interactive Learning Conference**. Specify the location as **Honolulu**. Set a one-day reminder for the event, and show as **Out of Office**.
4. Create an appointment with the subject **Review final presentation edits**, on Monday of that same week, starting at 1 P.M. and ending at 2:00 P.M. In the body of the appointment, key the text **Use this time to practice the final presentation and work out any flaws**. Set a reminder for the preceding Friday. Set Show as to **Tentative**.
5. Create a new e-mail message, addressing the message to your instructor. Key the subject of the message as **Presentation Review**. For the body of the message, key **This is a meeting to review our final presentation at the Interactive Learning Conference. I would like to give it a practice run**.
6. Connect to the Internet and send the message.
7. Log off the Internet if your instructor tells you to do so.

8. Locate the message that you just sent in the Sent Items folder and print it. Use a Memo Style print style, with your name as a centered header.
9. Display the date for the Monday of the week that you scheduled the appointment and the event in the previous steps.
10. Print the Calendar, using a Weekly Style. Add your name as a centered header and the date as a centered footer.

On Your Own

In these exercises you work on your own, as you would in a real-life work environment. Use the skills you've learned to accomplish the task—and be creative.

Exercise 3-35

Plan an elaborate, catered surprise anniversary party for a friend or relative. Schedule appointments and meetings to plan and prepare for the event. Consider all elements for the party. Plan for food and entertainment. Plan to collect photos for a nostalgic slide show and invitations. Print the Calendar.

Exercise 3-36

Use the Internet to research a destination to which you need to travel for a business trip, sales call, or conference. Set up a detailed itinerary in your Calendar. Print the Calendar.

Exercise 3-37

Document your week. Use the Calendar to show all your work, school, and community related activities and personal errands. Print the Calendar.

Lesson 4

task Management

OBJECTIVES

MCAS OBJECTIVES

In this lesson:

OL07 3.1.1
OL07 3.1.2
OL07 3.1.3
OL07 3.1.4
OL07 3.1.5
OL07 3.2.1
OL07 3.2.2
OL07 3.2.3
OL07 5.4.3

After completing this lesson, you will be able to:

1. Create tasks, modify tasks, and mark tasks as complete.
2. Work with assigned tasks.
3. Locate tasks.

Estimated Time: 1½ hours

Outlook's powerful task management component goes far beyond simply creating tasks and marking them as complete. In addition to those important pieces of information, Outlook allows you to assign tasks to others, accept or decline tasks, and keep up to date on the current status of tasks.

Outlook also gives you an easy way to generate task lists, assign work to others, and send status reports on assigned tasks. After you've created a task, you can update it in various ways, such as marking it completed, changing the due date, or marking it a recurring task. Recurring tasks can occur at regular intervals or at a date you set for completion. Examples of a recurring task include updating your computer's software or creating a weekly meeting agenda.

Creating and Modifying Tasks and Marking Tasks as Complete

You can create tasks in Outlook by filling in a form with fields for the information that describes the task. You can create new tasks by first opening a blank form or you can create new tasks based on the information from an e-mail message. You can also begin the process of creating a contact from the header information of an e-mail message.

Once you have created a task, it is easy to modify or add to the information when updates are necessary. Additionally, you can easily remove tasks that are no longer valid or needed from your task list.

Exercise 4-1 CREATE A NEW TASK

There are several ways to begin the process of creating a task in Outlook. You can:

- Press **Ctrl+N** while viewing the tasks.
- Press **Ctrl+Shift+K** while viewing any part of Outlook.
- Click the New button while viewing tasks.
- Choose Task from the drop-down list of the New button.



Figure 4-1
The new Task form



3. In the Subject text box **Copy Reports for Project Team**.
4. Click on the drop-down arrow  next to the Start date field. The date selection tool will appear.
5. Click on the **Today** button.
6. Click on the drop-down arrow  next to the Due date field. The date selection tool will appear.
7. Click on the date for next Monday.

**TIP**

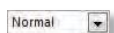
You can quickly save and close tasks by using the keyboard shortcut **Alt+S**.

8. Click on the drop-down arrow  next to the Priority field and select **High**.
9. Key **20 copies are needed** in the task note area.
10. Click on the Save & Close button  on the Task tab on the Ribbon.

Figure 4-2
The completed Task Form

Exercise 4-2 CREATE RECURRING TASKS

You can create tasks that recur using the same methods that you use for creating other tasks.

1. Click the New button  from the Standard toolbar to open a new Task form.
2. In the Subject text box key **Create Meeting Agenda**.
3. Click on the drop-down arrow  next to the Start date field. The date selection tool will appear.
4. Click on the first Monday of the next month.
5. Click on the drop-down arrow  next to the Priority field and select **Low**.
6. Key **Weekly Meeting Agenda** in the task note area.
7. Click on the Recurrence button  on the Task tab on the Ribbon. The Task Recurrence dialog box will appear.

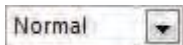


Figure 4-3
The Task Recurrence dialog box

The Task Recurrence dialog box is shown with the following settings:

- Recurrence pattern:**
 - ☒ Recur every 1 week(s) on
 - ☐ Sunday ☒ Monday ☐ Tuesday ☐ Wednesday
 - ☐ Thursday ☐ Friday ☐ Saturday
 - ☐ Regenerate new task 1 week(s) after each task is completed
- Range of recurrence:**
 - Start: Mon 1/1/2007
 - ☐ No end date
 - ☐ End after: 27 occurrences
 - ☒ End by: Tue 7/3/2007
- Buttons: OK, Cancel, Remove Recurrence

8. Click on the drop-down arrow ▼ next to the **End by** field. The date selection tool will appear.

9. Click on a Monday approximately two months ahead of the start date.

10. Click on the OK button  to close the Task Recurrence dialog box.

11. Click on the Save & Close button  on the Task tab on the Ribbon.

TIP

When working with recurring tasks, you can also end the task after a specified number of occurrences or set recurring tasks without end dates.

Figure 4-4
The completed recurring Task form

The completed recurring Task form is shown with the following details:

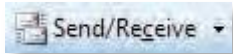
- Task Name:** Create Meeting Agenda - Task
- Subject:** Create Meeting Agenda
- Start date:** Mon 1/1/2007
- Due date:** Mon 7/2/2007
- Status:** Not Started
- Priority:** Low
- % Complete:** 0%
- Reminder:** None
- Owner:** Student
- Task Description:** Weekly Meeting Agenda

Exercise 4-3 CREATE A TASK FROM A MESSAGE

You can create a task from a message by clicking and dragging a mail message to the Tasks button.

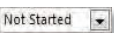
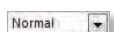


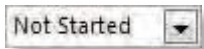
1. Click on the Mail button  in the Navigation pane to display your Mail.
2. Click on the New button  in the Standard toolbar to create a new Mail message.
3. Key your **e-mail address** into the **To** field.
4. Click in the **Subject** field and key **Status Report**.
5. In the message area, key **Please send a revised copy of your Status Report**.
6. Click on the Send button .
7. Click on the Send/Receive button  to receive the mail message.
8. Click the Status Report message in the message list. Drag the message to the Tasks button  in the Navigation pane. A Task window containing the information from the message will open.
9. Click on the drop-down arrow  next to the Due date field and click on the date for next week Monday.
10. Click on the Save & Close button  on the Task tab on the Ribbon.



Exercise 4-4 MODIFY TASKS

There are several ways to modify a task in Outlook. You can:

- Press **Ctrl**+**O** while a task is selected.
 - Right-click a task from your To-Do List and select Open.
 - Double-click a task from your To-Do List.
1. Double-click the **Status Report** task. The Status Report task will open in a Task window.
 2. Click on the drop-down arrow  next to the Status field.
 3. Click on **In Progress**.
 4. Click on the drop-down arrow  next to the Priority field and select **High**.
 5. Click in the % Complete text field and key **50%**.



**TIP**

You can quickly modify tasks directly from the To-Do list by clicking on the different options available including Task Subject, Status, Due Date, % Complete, and Categories.

6. Click on the Save & Close button .

7. Double-click the **Status Report** task. The Status Report task will open in a Task window.

8. Click on the drop-down arrow  next to the Status field.

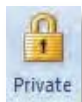
9. Click on **Deferred**.

10. Click on the Save & Close button  on the Task tab on the Ribbon.

Figure 4-5
The completed
modified Task form

Exercise 4-5 MARK TASKS AS PRIVATE

You can mark tasks as private in Outlook to ensure that others on your network cannot see specific tasks. You can use the Private button on the Ribbon.



1. Double-click the **Status Report** task. The Status Report task will open in a Task window.

2. Click on the Private button  on the Task tab on the Ribbon.

3. Click on the Save & Close button  on the Task tab on the Ribbon.

Exercise 4-6 COMPLETE TASKS

There are several ways to complete a task in Outlook. You can:

- Click on the drop-down arrow in the Status field and select Completed.
- Click on the Status drop-down menu in the To-Do List and select Completed.
- Click on the Mark Complete button on the Task tab on the Ribbon.



TIP

You can quickly mark tasks as complete directly from your To-Do List by clicking on the task's status and selecting Complete.

1. Double-click the **Status Report** task. The Status Report task will open in a Task window.
2. Click on the drop-down arrow  next to the Status field and select **Completed**.
3. Click on the Save & Close button  on the Task tab on the Ribbon. The Status Report task should no longer be listed in your To-Do List.

Working with Assigned Tasks

Exercise 4-7 ASSIGN TASKS TO OTHERS

Outlook enables you to assign tasks to others and to track their progress. If you are a supervisor, you could assign a task to a subordinate. Or, if you're working on a project with a group, you might assign a task to a coworker.

You assign a task to someone in the form of a *task request*, which is an e-mail message asking the message recipient to complete a specific activity. The recipient can either accept or decline the sender's request or delegate the task to someone else. When you *delegate* a task, you assign the task to someone else and you give up "ownership" of the task. This means you cannot change information in the task, such as the due date. However, you can keep an updated copy of the task in your task list, and you can receive status reports on its progress. You delegate tasks usually to a subordinate, occasionally to a coworker or equal, but never to a supervisor.

You can assign a task in various ways. You can:

- Click on the drop-down arrow next to New  and select Task Request.
- Click on the Assign Task button  from the Task window.
- Press **Ctrl+Shift+U** while viewing any part of Outlook.



NOTE

Because this is a new task request rather than a new task, this form differs from the Task form you've seen previously. The toolbar includes additional buttons and various text boxes that relate to the task assignment.

1. Click the **Tasks** shortcut in the Navigation pane to display the Tasks folder.
2. Click the down arrow next to the **New** button and select **Task Request** from the menu (or press **Ctrl+Shift+U**). The Task form appears.

Figure 4-6
The Task form for a
new task request

You will need a student partner for this exercise, as you will be assigning tasks to each other. You and your partner will be referred to as “Student 1” and “Student 2” in the steps that follow. Decide which one of you is Student 1 and which is Student 2.

To...

To ->

- Click on the To button . The Select Task Recipient: Contacts dialog box appears.



TIP

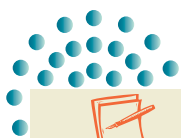
You do not need to select a member from your contacts to assign a task to. You can also assign tasks by typing their e-mail address directly into the To field.

- Select your partner and click the To button . If your partner's information is not in the Select Task Recipient: Contacts menu, refer to Lesson 2 for details on inputting his or her contact information (you can also key your partner's e-mail address in the To field).

OK

- Click the OK button . The Task form reappears, with your partner's name in the To text field.
- In the Subject field, key the following material for either Student 1 or Lesson 2, depending on which you have chosen:
Student 1: **Prepare handouts for conference presentation**
Student 2: **Request equipment for conference presentation**
- Click on the drop-down arrow next to the Due date field. Select a date approximately two weeks in the future.
- Set the Priority field to **High**.

9. If they are not already selected, select the options for keeping an updated copy on the task list and sending a status report when the task is completed.

**NOTE**

Tasks cannot be assigned to others with Outlook Connector.

10. Click on the Send button  on the Ribbon (you must be connected to the Internet to complete this step). The To-Do List will list this task even though you are not the owner of the task because you selected the option for placing an updated copy of the task in your task list.

11. Open the “Prepare handouts” task if you are Student 1; open the “Request equipment” task if you are Student 2. The Task form differs from other tasks in the To-Do List. This is a task request and you are not the owner of this task. You cannot change the details of the task, such as the status or the due date. Although your partner has not yet accepted the task assignment, your partner is the current owner of this task.

Figure 4-7
Task form for sent
task request

The screenshot shows the Outlook Task form for a task titled "Prepare handouts for conference presentation". The form is divided into several sections:

- Actions:** Includes buttons for Delete, Task, Details, Send Status Report, Reply, Reply to All, Forward, Spelling, and Proofing.
- Task Details:**
 - Due in 14 days. Waiting for response from recipient.
 - Subject: Prepare handouts for conference presentation
 - Due date: Due on 7/31/2007
 - Status: Not Started
 - Priority: High
 - % Complete: 0%
 - Owner: Student 1 (student1@isp.isp)
- Task Body:** A large empty text area for notes or details.

12. Click on the Send button  (you must be connected to the Internet to complete this step).

Exercise 4-8 ACCEPT AND DECLINE TASKS

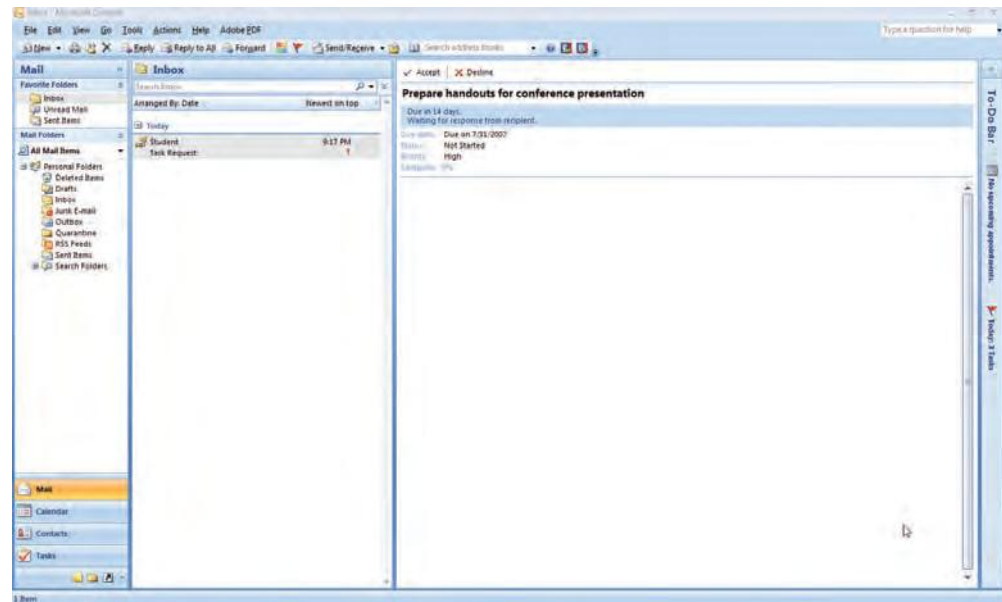
Just as you can assign tasks, you can be the recipient of a task request. When you receive a task request, you become the temporary owner of the task. You can accept the task, decline the task, or assign the task to someone else.

If you accept the task, you assume ownership of the task and it is added to your task list. You are then the only person who can make changes to the task. When you decline a task, it is returned to the person who sent it to you. If you delegate the task to someone else, you can keep an updated copy of the task in your To-Do List, but ownership and the ability to make changes are transferred to the person to whom you delegate it.

Task requests appear in your Inbox as e-mail items, identified by the words “Task Request” in the Subject field. You open them as you would any e-mail message. They also appear in your task list.

1. Click on the **Inbox** folder. Click on the Send/Receive button  on the Standard toolbar to retrieve the task requests sent to you, if you have not already received them.
2. Locate the task request items in your Inbox.
3. Open the “Request equipment” task if you are Student 1; open the “Prepare handouts” task if you are Student 2. The Task dialog box appears.

Figure 4-8
Inbox containing task requests



TIP

You can also accept and decline Assigned Tasks from the preview pane by clicking on the Accept or Decline buttons above the subject.



4. If you are Student 1 (Student 2: continue at Step 6), click on the Accept button  on the Task tab on the Ribbon. A dialog box is displayed asking if you want to edit the message sent with the response.
5. Click on the OK button  to send the response. The response is sent and the task is added to your To-Do List.
6. If you are Student 2 (Student 1 is finished with this exercise), click on the Decline button  on the Task tab on the Ribbon. The Declining Task dialog appears, asking if you want to edit the message sent with the response.

7. In the Declining Task dialog box, click the **Edit the response before sending** radio button and click on the OK button .
8. In the Task window, key **George already completed this task**.
9. Click on the Send button . Since you declined the task, it was not added to your To-Do List.

Exercise 4-9 SEND STATUS REPORTS ON ASSIGNED TASKS

After accepting tasks, you can also keep those who assigned the tasks to you informed of your progress with status reports. A status report sends an e-mail message to the individual who assigned the task with the updates that you made to the task.

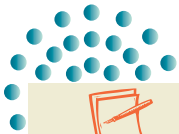
1. Student 1: Click on the Tasks button  in the Navigation pane to display your To-Do List (Student 2 cannot complete this exercise unless he or she accepted an assigned task).
2. Double-click the “Request equipment” task. The Task window appears.
3. Click in the % Complete field and key or select **75%**.
4. Click on the Send Status Report button  on the Task tab on the Ribbon. A message window appears. The name of the person who assigned the task is displayed in the To field. The contents of the message include the current status of the task.
5. Click the Send button .
6. Click the Save & Close button.



Locating Tasks

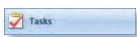
Exercise 4-10 SEARCH FOR TASKS

In many cases, individuals may have many tasks in their To-Do List. Therefore, rather than searching for tasks by looking through your To-Do List, you can search for tasks using Outlook’s Instant Search feature.



NOTE

Since Windows Vista indexes tasks, you may not find a task that you searched for if the task was not indexed yet.

1. Click on the Tasks button  in the Navigation pane.
2. In the Instant Search text field , ensure that Search All Task Items is selected.
3. In the Instant Search text field, key **equipment**. Outlook will display the matching task items.

Lesson 4 Summary

- You can create new tasks by filling in the Task window.
- Tasks include a subject, start date, due date, status, priority, % complete, and message.
- You can create recurring tasks for tasks that occur on a regular basis.
- You can specify the range of occurrence of a recurring task by number of occurrences, an end date, or no end date.
- You can click and drag mail messages to the Task icon to create a task from a mail message.
- You can modify tasks by double-clicking them from your To-Do List.
- You can ensure that other network users do not see specific tasks by marking them as private.
- When you are finished with a task, you should mark it as complete.
- When assigning tasks to others, Outlook sends the recipient a mail message, which he or she can accept or decline.
- You can keep a copy of the assigned task in your To-Do List by checking the option, Keep an updated copy of this task on my task list.
- You can send updates regarding tasks to the assignee by clicking the Send Status Report button on the Ribbon.
- You can find task items instantly with the Instant Search feature.

LESSON 4

Command Summary

Feature	Button	Task Path	Keyboard
Create New Task		File, New, Task	Ctrl + Shift + K
Create New Task Request		File, New, Task Request	Ctrl + Shift + U
Open a Task		File, Open, Selected Items	Ctrl + O

Concepts Review

True/False Questions

Each of the following statements is either true or false. Indicate your choice by circling T or F.

- T F 1. New tasks can be created from any view in Outlook.
- T F 2. You cannot set a task to recur.
- T F 3. It is possible to create tasks from mail messages.
- T F 4. You can modify a task in your To-Do List.
- T F 5. You can prevent other network users from seeing specific tasks.
- T F 6. You can delegate work by assigning tasks to others.
- T F 7. You can assign a task to yourself using the New Task Request window.
- T F 8. When declining a task, you can send a message to the assignee with a reason.
- T F 9. You can keep the task assignee up-to-date with Status Reports.
- T F 10. If you have difficulty locating a task, you cannot search for it.

Short Answer Questions

Write the correct answer in the space provided.

- 1. Describe some of the possible methods for creating a new task.

- 2. What different priority levels exist for tasks?

- 3. What range of recurrence options are available for recurring tasks?

- 4. How do you create a task from an e-mail message?

- 5. Describe some of the possible methods of opening a task to modify it.

6. What should you do when you finish a task?

7. Describe some of the possible methods of creating a new task request.

Critical Thinking

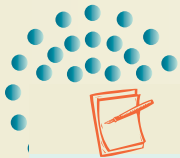
Answer these questions on a separate page. There are no right or wrong answers. Support your answers with examples from your own experience, if possible.

1. What types of tasks could be recurring tasks?
2. What types of tasks would you mark as private?
3. How often should you send status reports?

Skills Review

Exercise 4-11

Create a Task, Change a Task, and Update a Task



NOTE

Your task list may already be empty.

1. Click on the tasks button  in the Navigation pane if the task list is not already displayed.
2. Delete any existing tasks in your task list by right-clicking on each task and clicking on the Delete option.
3. Create a new task by following these steps:
 - a. Click the New button  on the Standard toolbar.
 - b. In the Subject field, key **Revise Conference Worksheet**.
 - c. Click on the drop-down arrow next to the Due Date field and click on the next business day.
 - d. Click on the Save & Close button  on the Task tab on the ribbon.
4. Change a task by following these steps:
 - a. Click on the task you created in the previous step.
 - b. Move the insertion point to the end of the subject text.
 - c. Key the text for Maria. The subject of the task should now read “Revise Conference Worksheet for Maria.”
 - d. Click anywhere in the task list to deselect the “Revise Conference Worksheet for Maria” task.
5. Update a task by following these steps:
 - a. Double-click the **Revise Conference Worksheet for Maria** task.
 - b. Click the Mark Complete button  on the Task tab on the Ribbon.



Lesson Applications

Exercise 4-12

Create recurring tasks.

You've decided to set your schedule for the next year. After reviewing your schedule, you decided to develop a list of recurring tasks that come up weekly and monthly. You need to create these tasks to ensure that you are ready for the next six months.

1. Display the task list and create a new task. In the Subject field, key **Weekly Report**. Make the due date roughly one week from today.
2. Set the task to recur every week for the next six months.
3. In the text area of the task, key **Include updates and timeline**.
4. Save & Close the task.
5. Create a new task. In the Subject field, key **Presentation for Department Meeting**. Make the due date roughly one month from today.
6. Set the task to recur every month for the next six months.
7. In the text area of the task, key **Use PowerPoint with visuals**.
8. Save & Close the task.
9. Create a new task. In the Subject field, key **Joan's birthday**. Make the due date **April 25** of the current year.
10. Set the task to recur yearly with no end date.
11. In the text area of the task, key **Joan likes candy**.
12. Save & Close the task.

Exercise 4-13

Assign tasks.

For this exercise, you will need to work with a partner. You've decided to delegate some of your responsibilities to a coworker. You need to assign two tasks to a coworker and stay up to date on their progress.

1. Student 1: Assign a new task to your partner. In the Subject field, key **Sales Charts**. Make the due date roughly one week from today.
2. Student 1: Set the priority to **High**. Send the task.
3. Student 2: Check your e-mail and accept the task.
4. Student 1: Assign a new task to your partner. In the Subject field, key **Copy Reports**. Make the due date roughly one week from today.
5. Student 2: Check your e-mail and decline the task, giving the following reason: "Joan already copied the reports."
6. Student 1: Check your e-mail to ensure that you received the accept and decline messages.

7. Student 2: Send a status report to Student 1 indicating that the task is 50% complete.
8. Student 1: Check your e-mail to ensure that you received the status report.

Exercise 4-14

Locate and update tasks.

Joan's birthday is coming up soon and you do not know what to get her. However, you remembered that you wrote down something that she likes in your Task list.

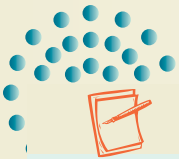
1. Display the task list.
2. Conduct an Instant Search to find Joan's birthday.
3. Send yourself an e-mail reminder of what to buy Joan for her birthday.
4. Update the task with items you should avoid getting for Joan. In the text area, key **Joan does not like salty foods**.

Exercise 4-15 ♦ Challenge Yourself

Schedule tasks.

You've been asked to accompany the staff of the Design Department to a furniture manufacturers' conference. You need to schedule tasks in preparation for the trip.

1. Create a new task with the subject **Work out travel budget**, with a due date approximately one month from today. In the text area of the task, key **Maria needs this budget before she will authorize the expenses**. Set the status as **In Progress**. When finished, Save & Close this task.
2. Assign a new task to your instructor. In the subject area of the task, key **Itinerary for Budget**. For the message of the text, key **Please send me the itinerary as soon as possible so I may complete the budget**.
3. Connect to the Internet and send the task.
4. Log off the Internet if your instructor tells you to do so.



NOTE

Your instructor will provide you with an e-mail address.

On Your Own

In these exercises you work on your own, as you would in a real-life work environment. Use the skills you've learned to accomplish the task—and be creative.

Exercise 4-16

Plan for an elaborate project that will last 6 months. Break the project down into a series of milestone tasks that highlight the deliverables at various stages of the project. Print the task list.

Exercise 4-17

Look through your e-mail and choose an e-mail that is asking you for action. Get a friend to e-mail you a request if you do not already have one. Drag the e-mail to your task list to create the initial task. Develop a list of tasks to complete the request. Print the task list.

Exercise 4-18

Develop a list of recurring tasks for your work or school related activities. Plan so that you are ready for the next complete time cycle, such as a project milestone at work or a semester or term at school. Print the task list.

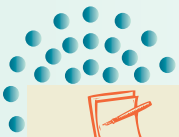
Unit 2 Applications

Unit Application 2-1

Schedule a recurring appointment and an event, use reminders, create a task, and print the task and Calendar.

James Strickland, your manager, has asked you to coordinate a product launch. You'll need to schedule the event and an appointment in your calendar for the preparations. Create tasks to manage preparation and print the tasks and Calendar for referral when you are away from your computer.

1. Schedule the product launch as a new, all-day event in your Calendar, choosing a date three months after the current date. The subject of the event is **Widget Product Launch**. Key the location of the event as **Municipal Hall**. In the body of the Event form, key **Product launch at Consumer Expo**. Have a reminder set two days before the event. Mark the event as **Out of office**.
2. On the day after the event, schedule a party as an appointment in your Calendar, from 3:30–5:30, with the subject of the appointment **Post-Expo party**. Specify the location as **Magoo's Grill**. Set a reminder for one hour before the appointment. Mark the appointment as private. In the body of the Appointment form, key **Employees are scheduled to arrive at 3:45 PM Clients to arrive at 4:30 PM**.
3. Delete any existing tasks in the task list. Create a new task titled **Prepare displays for Expo**. Make the due date the week before the exposition, and set no reminder. Create a second task titled **Invite top clients for post-expo party**. Make the due date two weeks before the exposition, set no reminder, and make the status of the task **In Progress**. Create a third task, titled **Assemble samples and product info bags and plan catering**. Make the due date three days before the party, and set a reminder for the day before.
4. Create a new contact, using a classmate's name and e-mail address.
5. Create a new e-mail message from the Event, addressing it to your instructor. Cc the classmate you added as a contact in Step 4. Use the **Cc** button to add the classmate's e-mail address to the Cc field from the Contact list. Make the subject of the message **Visit our booth at the Expo!** In the body of the e-mail, key **We are launching an exciting new product**.
6. Connect to the Internet and send the message. Log off the Internet if your instructor tells you to do so.
7. Display the Sent Items folder in the Mail view, and select the e-mail that you just sent. Print the message, using the Memo Style as the printing style. Add your name as a centered header, and delete any existing footer information.



NOTE

Your instructor will provide you with an appropriate e-mail address.

8. Print the task list, using the Table Style as the print style. Make sure all rows are included in the task list. Add your name as a centered header, and delete any existing footer information.
9. Display the date of the event. Delete any Calendar items not entered in this exercise. Print the Calendar in Daily Style, adding your name as a centered header, and delete any existing footer information.
10. Select the party item in the Calendar and print the Calendar again, this time using the Calendar Details Style as the print style and adding your name as a centered header.
11. Hand in all printouts to your instructor.

Unit Application 2-2

Schedule a recurring appointment and an event, use reminders, create a task, and print the task and Calendar.

Your family has asked you to be in charge of an anniversary party for your grandparents. You'll need to schedule the event and time in your Calendar for preparations.

1. Display your Calendar.
2. Schedule the party as a new, all-day event in your Calendar, choosing a date that is a Saturday one month from the current date. The subject of the event is **50th Wedding Anniversary**. In the body of the Event form, key **Anniversary party at the country club**. Set a reminder for one week before the event.
3. On the day of the event, schedule the party as an appointment in your Calendar, from 12:30–2:30 P.M., with the subject of the appointment as **50th Anniversary Party**. Specify the location as **Four Greens Country Club**. Set a reminder for two hours before the appointment. In the body of the Appointment form, key **Family is scheduled to arrive at 12:45, Grandmother and Grandfather at 1:30 PM**.
4. Delete any existing tasks in the task list. Create a new task titled **Shop for anniversary present**. Make the due date the week before the party, and set no reminder. Create a second task titled **Invite guests for anniversary party**. Make the due date two weeks before the party and set no reminder, and set the status to **In Progress**. Create a third task, titled **Shop for drinks, hors d'oeuvres, and cake**. Make the due date the day before the party, and set a reminder for the day before, and set the status to **In Progress**.
5. Schedule an appointment on Monday of that week. Key the subject of the appointment as **Party planning meeting**, and start the appointment from 10–11 A.M. Specify the location as **My house**.
6. Set no reminder for the appointment, and in the body of the appointment, key **Sort through old family photos for slide show and assign speeches**.

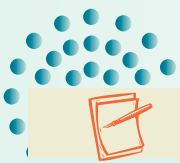
7. Make this a recurring appointment, using a daily recurrence pattern, with a range of recurrence that is to end after four occurrences.
8. On the Friday of that same week, schedule an appointment from 8–12 AM. For the subject of the event, key **Make PowerPoint slide show of family photos**. For the location, key **Dave's house**.
9. Set the reminder to one day, and set the **Show as** option as **Busy**.
10. Print the task list, using the Table style as the print style. Make sure all rows are included in the task list. Add your name as a centered header, and delete any existing footer information.
11. Print the Calendar for the week you scheduled the appointment and event, using a Weekly Style. Add your name as a centered header, if it does not appear in the header already.
12. Display the date of the event. Delete any Calendar items not entered in this exercise. Print the Calendar in Calendar Details Style, adding your name as a centered header, and delete any existing footer information.
13. Hand in all printouts to your instructor.

Unit Application 2-3 ♦ Using the Internet

Pick a destination that you would like to visit. The occasion is a holiday with family or friends. Think of the interests of those that will accompany you on this vacation and locate Web sites about interesting locations. For example, someone may be interested in exploring historical locations like the Mayan pyramids of Mexico or someone may want to relax on the golf courses of South Carolina, or enjoy hiking down into an extinct volcano in Maui, and so on.

Choose at least three destinations, preferably with different types of activities. Do comparison shopping on at least two different travel services Web sites selling the same or similar vacations. If possible, note the amenities (hotel, air, etc.) associated with each vacation package.

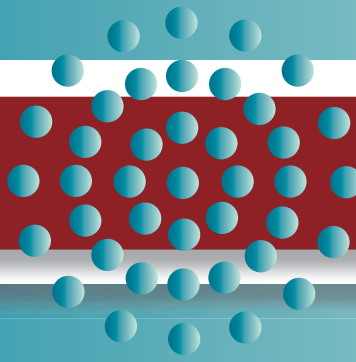
1. Compose an e-mail message describing the information you've obtained, addressing it to your instructor. Include the address of the Web site for each of the vacation destinations. Send the message.
2. Create a task from the e-mail and print a copy of the task in Memo Style. Center your name in the header.
3. Pick a date in your Calendar to take the vacation. Make that date an event, and set a reminder for the day before. Delete any other appointments or events for that day and print the Calendar for that Day, using a Daily Print Style. Center your name in the header.
4. Create a task list with at least three more tasks associated with this project. You may mark any or all of them completed, if you wish. Delete any other tasks, except the one created above in this exercise. Print out the task list, using a Table Style for the print style. Center your name in the header.
5. Hand in all printouts to your instructor.



NOTE

Your instructor will provide you with an appropriate e-mail address.

unit 3



ADVANCED TOPICS

Lesson 5 Managing E-mail Efficiently 124

Lesson 6 Categorizing and Managing Outlook
Data Files 164

UNIT 3 APPLICATIONS 180

Lesson 5

Managing E-mail Efficiently

OBJECTIVES

MCAS OBJECTIVES

In this lesson:

OL07 1.2.1
OL07 1.2.2
OL07 1.4.1
OL07 1.4.2
OL07 1.5.1
OL07 1.5.2
OL07 1.5.3
OL07 1.6.1
OL07 1.6.2
OL07 1.6.3
OL07 1.6.4
OL07 1.6.5
OL07 4.2.3
OL07 5.3.1
OL07 5.3.2
OL07 5.3.3
OL07 5.3.4
OL07 5.3.5
OL07 5.4.1
OL07 5.4.2
OL07 5.4.5
OL07 5.5.1
OL07 5.5.2
OL07 5.5.3
OL07 5.5.4
OL07 5.6.1
OL07 5.6.2
OL07 5.6.3
OL07 5.6.4

After completing this lesson, you will be able to:

1. Create and manage your signature and automated settings.
2. Configure e-mail message sensitivity and importance settings.
3. Configure e-mail message security settings.
4. Configure e-mail message delivery options.
5. Organize mail folders.
6. Create, modify, and remove rules to manage e-mail messages.
7. Locate Office Outlook 2007 items by the search feature.
8. Customize your Office 2007 experience.

Estimated Time: 2½ hours

After you've become accustomed to Outlook's various components, you can further refine your skills by using Outlook's advanced e-mail features to help you manage your e-mail efficiently. You can configure your e-mail settings to indicate to your recipient the importance level of the message and even automatically add a signature to all of your messages.

To ensure that your e-mail messages are managed efficiently, you can save messages to different folders and even create rules to automatically organize the e-mail you receive. If you lose a message, you can instantly locate it with Outlook's Instant Search feature.

Configuring E-mail Settings

Settings allow users to customize the behavior of Outlook. You can adjust the Outlook settings to affect how you interact with your e-mail. Some of the features you can affect are signatures, out of office messages, priority levels, and organizational categories.

Creating and Managing Your Signature and Automated Settings

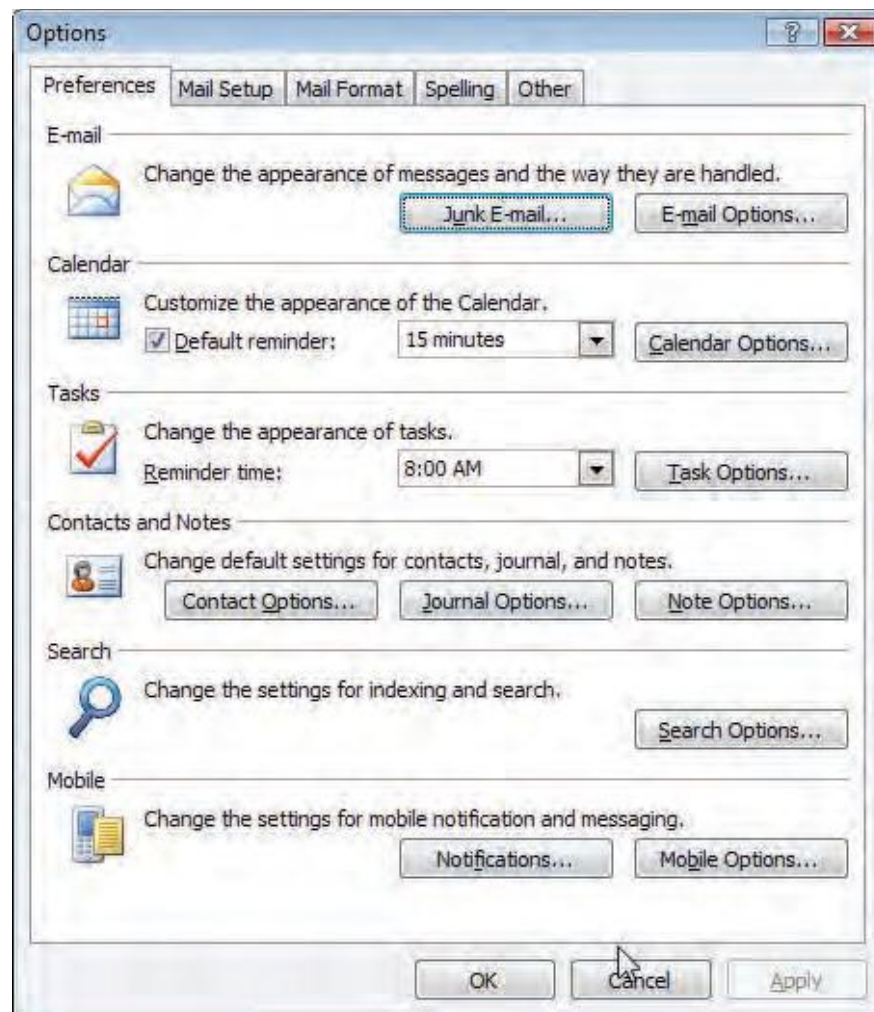
A *signature* is text automatically added to any message that you send. For example, a signature can include your name, your job title, and your phone number. Signatures are flexible and can also include paragraphs informing recipients of how to respond to a message you send them or even where to reach you.

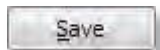
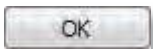
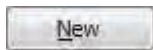
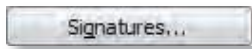
Exercise 5-1 CREATE AND MODIFY A PERSONAL SIGNATURE

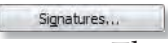
You must create a signature before you can apply it to your messages. You can even create various signatures and choose the appropriate one to apply to your message.

1. With the Inbox window displayed, click **Tools** on the menu bar and click the **Options** item from the drop-down menu. The Options dialog box appears.

Figure 5-1
The Options dialog box



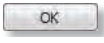


2. In the Options dialog box, click the **Mail Format** tab.
3. Click on the Signatures button  in the Signatures area to manage your e-mail signatures. The Signatures and Stationery dialog box appears. Click the **E-mail Signature** tab if it is not already displayed.
4. Click on the New button  in the E-mail Signature area. The New Signature dialog box appears.
5. In the text box under Type a name for this signature, key **your initials** and click the OK button . You should now see your new entry selected in the Select a signature to edit list box.
6. Click into the Edit signature text box and key **your name** and on a new line key **WidgetWorks Intern**. Click the Save button .
7. In the Signatures and Stationery dialog box under Choose default signature, Outlook adds the new signature to the New Messages and Replies/forwards pop-up lists.
8. If your initials do not appear in the New Messages pop-up list, click the down arrow next to the list and choose the signature that you created in the previous steps.

**TIP**

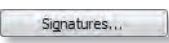
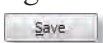
You can format your signature using the tools provided in the Signatures and Stationery dialog box. You can even add images and hyperlinks to your signature.



9. Click the OK button . The Options dialog box reappears. Now that you have created a signature, you can have it automatically applied to any new message that you create.
10. Click the OK button . The Inbox reappears.
11. Click the New button  and a message form appears. Outlook adds the signature text to the text area of the Message form. You key text above the signature, just as you would with any new message.
12. Close the message form without saving.

Exercise 5-2 EDIT A SIGNATURE

You can make changes to any signature you've created. For example, if your signature includes your phone number or job title, you can edit your signature if this information changes.

1. Choose **Tools** on the menu bar and click the **Options** item from the drop-down menu. The Options dialog box appears.
2. Click on the Signatures button  in the Signatures area of the Mail Format tab.
3. Click to select the signature you want to edit in the Select signature to edit list box.
4. Click into the Edit signature text box, delete "Intern" in the current signature text, and key **Design Associate**. Click the Save button . The signature now contains your modifications.

- Click the OK button  to close the Signatures and Stationery dialog box and click the OK button  again to close the Options dialog box.

Exercise 5-3 ADD A SIGNATURE TO A SINGLE E-MAIL MESSAGE

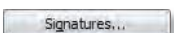
If you decide that you do not want to include your signature in all outgoing messages, you can add the signature to specific e-mail messages that you select.

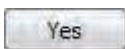
- Click on the New button  and a message form appears.
- In the To field, key your **e-mail address**.
- In the Subject field, key **Signature Test**.
- Click on the Signature button  and click on the signature you created earlier. Your signature will be added to your message.
- Click on the Send button  to send the test message to yourself.



Exercise 5-4 DISCONTINUE OR DELETE A SIGNATURE

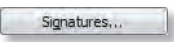
If you decide you no longer want signatures automatically added to your messages, you can instruct Outlook to stop applying them. You can also delete a signature if it is no longer needed.

- Choose **Tools** on the menu bar and click the **Options** item from the drop-down menu. The Options dialog box appears.
- Click on the Signatures button  in the Mail Format Pane.
- In the Signatures and Stationery dialog box under Choose default signature, click the down arrow next to New messages and select **(none)**. Do the same for Replies/forwards if needed.
- At this point you can click on the OK button  and click OK  again to apply your new preferences. You can also delete a signature completely.
- In the Signatures and Stationery dialog box under Select signature to edit, click the name of the signature you wish to remove and click the Delete button . A Microsoft Office Outlook alert box appears asking if you want to permanently remove the signature.
- Click Yes  and the signature is deleted.
- Click the OK button  to close the Signatures and Stationery dialog box and click the OK button  again to close the Options dialog box. The Inbox reappears.



Exercise 5-5 USE AN ELECTRONIC BUSINESS CARD AS AN AUTOMATIC SIGNATURE IN MESSAGES

If you decide that you would like to use your business card in messages, you can add it in the Signatures and Stationery dialog box.

1. With the Inbox window displayed, click **Tools** on the menu bar and click the **Options** item from the drop-down menu. The Options dialog box appears.
2. In the Options dialog box, click the **Mail Format** tab.
3. Click on the Signatures button  in the Signatures area of the Mail Format tab to manage your e-mail signatures. The Signatures and Stationery dialog box appears. Click the **E-mail Signature** tab if it is not already displayed.
4. Click on the New button  in the E-mail Signature area. The New Signature dialog box appears.
5. In the text box under Type a name for this signature, key **business** and click the OK button . You should now see your new entry selected in the Select a signature to edit list box.
6. Click on the Business Card button . The Insert Business Card window appears.

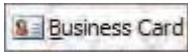
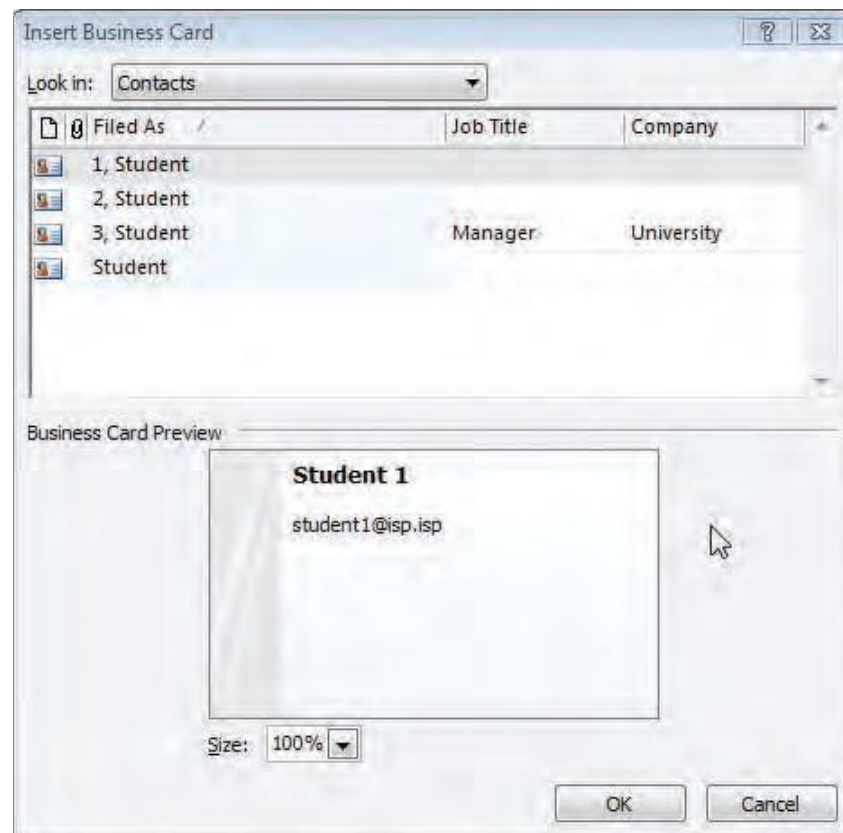
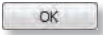
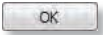


Figure 5-2
The Insert Business Card window

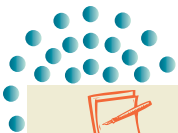


7. Click on one of your business cards and click on the OK button  to add it to your signature.
8. In the Signatures and Stationery dialog box under Choose default signature, Outlook adds the new signature to the New Messages and Replies/forwards pop-up lists.
9. If the text “business” does not appear in the New messages pop-up list, click the down arrow next to the list and choose the signature that you created in the previous steps.
9. Click the OK button . The Options dialog box reappears. Now that you have created a signature, you can have it automatically applied to any new message that you create.
10. Click the OK button . The Inbox reappears.
11. Click the New button  and a message form appears. Outlook adds the business card as an attachment to your e-mail message.
12. Close the message form without saving.

Exercise 5-6

CREATE AN INTERNAL OUT OF OFFICE MESSAGE

The Internal Out of Office Message feature can be useful, as it automatically replies to messages within your organization when you are out of the office. You can set up an internal out of office message by using the Tools, Out of Office Assistant task path.



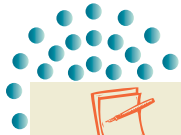
NOTE

You must be using a Microsoft Exchange server to complete this exercise.

1. Click on the **Tools** menu and click on the **Out of Office Assistant** option. The Out of Office Assistant window appears.
2. Click on the **Send Out of Office auto-replies** option.
3. Click on the **Only send during this time range** option.
4. Select 5:00 P.M. approximately one week from today as your start time.
5. Select 8:00 A.M. approximately two weeks from today as your end time.
6. Click on the **Inside My Organization** tab if it is not already selected. Key **I am on vacation for a week and will read your message upon my return.**
7. Click on the **OK** button.

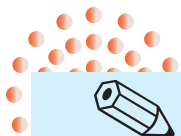
Exercise 5-7 CREATE AN EXTERNAL OUT OF OFFICE MESSAGE

The External Out of Office Message feature can be useful, as it automatically replies to messages outside of your organization when you are out of the office. You can set up an internal out of office message by using the Tools, Out of Office Assistant task path.



NOTE

You must be using a Microsoft Exchange server to complete this exercise.



TIP

If you do not use a Microsoft Exchange server, you may be able to get similar results by using Rules, discussed later in this chapter.

1. Click on the **Tools** menu and click on the **Out of Office Assistant** option. The Out of Office Assistant window appears.
2. Click on the **Send Out of Office auto-replies** option.
3. Click on the **Only send during this time range** option.
4. Select 5:00 P.M. approximately one week from today as your start time.
5. Select 8:00 A.M. approximately two weeks from today as your end time.
6. Click on the **Outside My Organization** tab if it is not already selected. Key **I am on vacation for a week and will read your message upon my return.**
7. Click on the **OK** button.

Configuring E-mail Message Sensitivity and Importance Settings

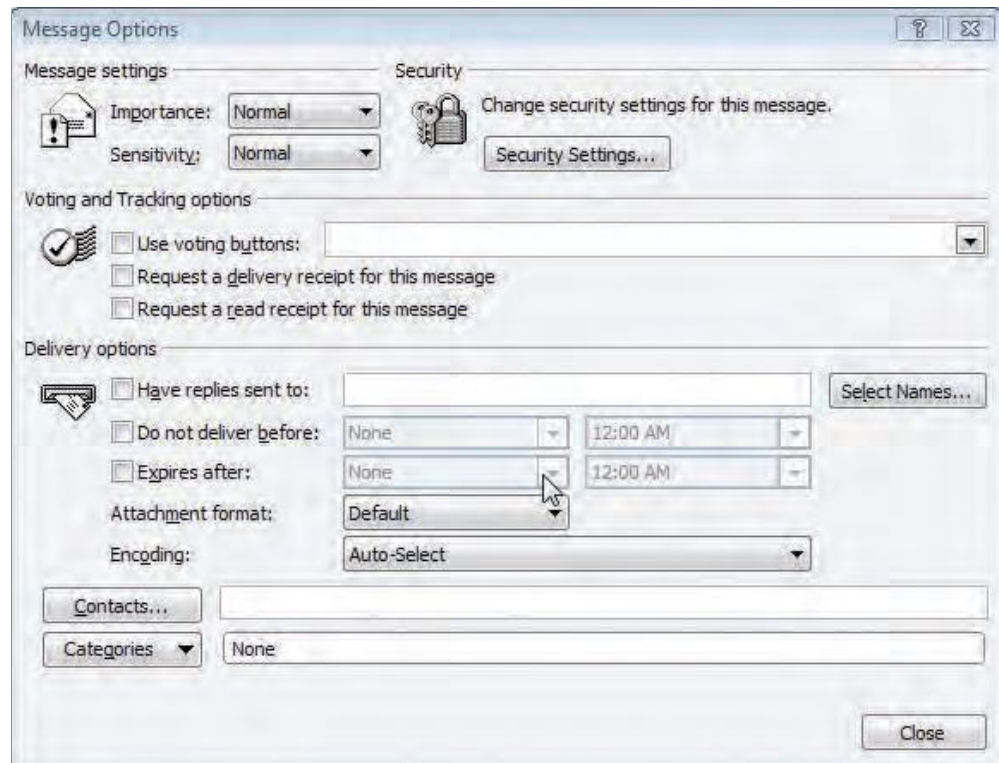
Configuring e-mail message sensitivity and importance settings can help the recipient of your e-mail message to understand how to work with it. Therefore, the recipient will know whether or not to read an e-mail message in public or if an e-mail is important and needs to be addressed immediately.

Exercise 5-8 SET MESSAGE SENSITIVITY LEVEL

Sensitivity levels can be useful to recipients because they inform them how to work with the message. You can edit the sensitivity level of a message by clicking on the Options dialog box launcher on the Message tab on the Ribbon.

1. Click on the Mail button  on the Navigation pane.
2. Click on the New button  on the Standard toolbar.
3. Click on the Options dialog box launcher  on the Message tab on the Ribbon. The Message Options dialog box appears.

Figure 5-3
The Message
Options dialog box



4. In the Message Settings section, select **Confidential** from the Sensitivity drop-down list.

5. Click on the Close button .

6. In the To field, key your e-mail address.

7. In the Subject field, key **Confidential Important Message**.

8. In the Message area, key **Confidential Important Message**.

9. Click on the High Importance button .

10. Click on the **Send** button.

11. Click on the **Send/Receive** button if the message did not arrive yet.

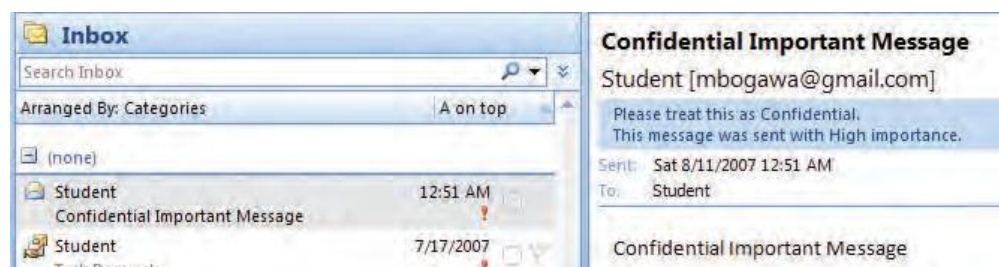
12. Click on **Confidential Important Message**. You should notice that an information bar appeared indicating that the message was confidential and important.



NOTE

Importance levels can be set as High, Normal, and Low. High-importance messages have a red exclamation point next to them, as shown in Figure 5-4. Low-importance message settings have a blue down arrow next to them.

Figure 5-4
The message sent
as confidential and
important

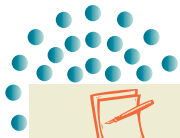


Configuring E-mail Message Security Settings

When working with e-mail, you may want to increase your security. You can do so by using a digital ID, restricting permissions on a message, or encrypting a message. A digital ID allows the recipient to verify that a message is really from you. Restricting permissions can prevent recipients from forwarding messages to others. Encrypting a message scrambles it so that only the recipient with your digital ID can read it.

Exercise 5-9 DIGITALLY SIGN A MESSAGE

You can add a digital signature from the Message Options dialog box.



NOTE

You must have a digital ID to complete this exercise.

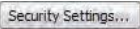
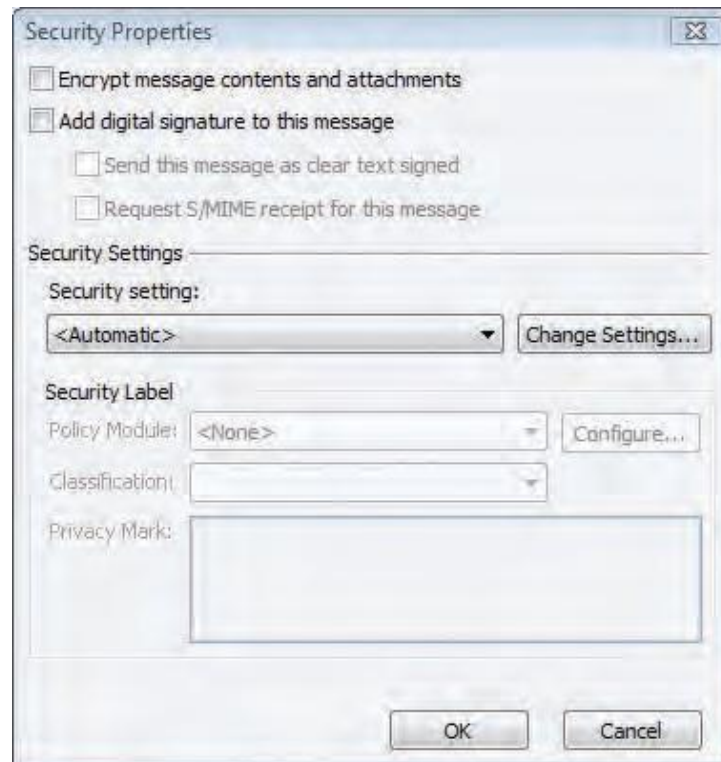
1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click on the **New** button on the Standard toolbar to create a new e-mail message.
3. In the To field, key **your e-mail address**.
4. In the Subject Field, key **Testing Digital Signature**.
5. Click on the **Options dialog box launcher** on the Message tab on the Ribbon. The Message Options window appears.
6. Click on the Security Settings button . The Security Properties window appears.

Figure 5-5
The Security Properties window



7. Click on the checkbox next to Add digital signature to this message. Click on the **OK** button, then the **Close** button.
8. Click on the **Send** button to send the message.

Exercise 5-10 RESTRICT PERMISSIONS TO A MESSAGE

You can restrict permissions to a message by using the Microsoft Office Button, Permission task path.



NOTE

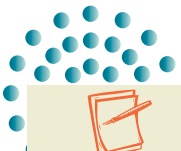
You must have the Windows Rights Management Services Client installed. Windows Vista users will have this feature installed by default.



1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click on the **New** button to create a new message.
3. In the To field, key **your e-mail address**.
4. In the Subject field, key **Message with Restrictions**.
5. In the Message area, key **Restricted Message (cannot forward)**.
6. Click on the Microsoft Office Button  in the Message window.
7. Click on the **Permission** option and click on **Do Not Forward**.
8. Click on the **Send** button to send the message.

Exercise 5-11 ENCRYPT A MESSAGE

You can encrypt a message and its attachments from the Message options dialog box.



NOTE

You must have a digital ID to complete this exercise and exchange it with a partner.

1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click on the **New** button on the Standard toolbar to create a new e-mail message.
3. In the To field, key **the e-mail address of your partner with whom** you exchanged digital IDs.
4. In the Subject Field, key **Testing Encryption**.
5. In the Message area, key **This is a sample encrypted message**.
6. Click on the **Options dialog box launcher** on the Message tab on the Ribbon. The Message Options window appears.
7. Click on the **Security Settings** button. The Security Properties window appears.

8. Click on the checkbox next to Encrypt message contents and attachments. Click on the **OK** button, then the **Close** button.
9. Click on the **Send** button to send the message.

Configuring E-mail Message Delivery Options

Among Outlook's extensive mail features, you can flag e-mail messages. The flags bring specific messages to your attention or to the attention of your recipient(s) with optional reminders. Another useful delivery option is delaying the delivery of a message. This feature can be used to send a message that needs to be delivered on a specific date/time.

Since efficiently managing our e-mail is important with the volume that we receive, we can use delivery receipts and/or read receipts so that we know if a message that we sent was delivered and read.

Another useful feature in Outlook is creating e-mail polls to gather data quickly. We can even request that replies sent from our recipients be sent to another address, if we manage multiple e-mail accounts.

Exercise 5-12 ADD A FLAG FOR FOLLOW-UP

You can flag an e-mail message to draw the recipient's attention to it. The flag icon appears in the Flag column of the Inbox, and a banner is displayed in the e-mail message. You can flag a message by clicking on the Flag button.

NOTE

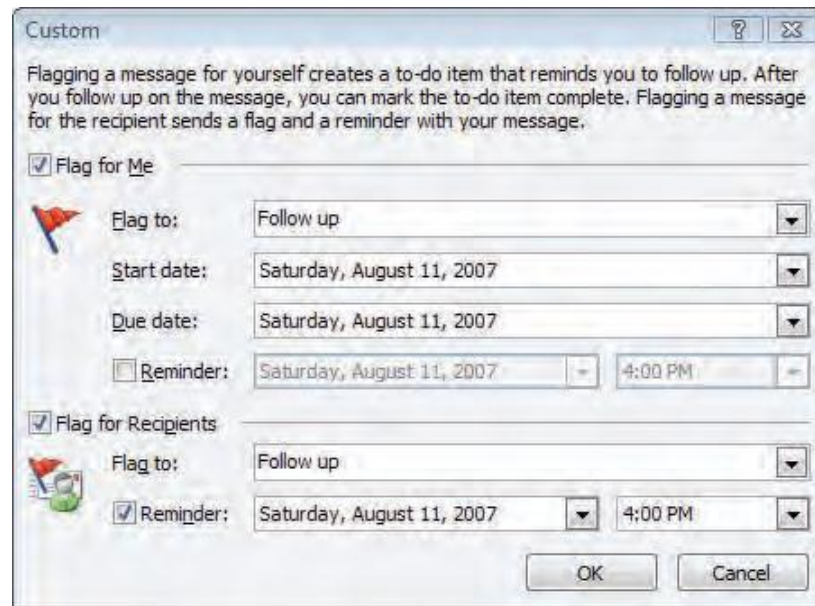
The Flag for Me checkbox flags the message for the author of the e-mail message. The Flag for Recipients checkbox flags the message for the recipient of the message.

TIP

It is a good idea to flag messages for recipients who receive a high volume of e-mail. Flags help to ensure that your message receives attention.

1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click on the **New** button on the Standard toolbar to create a new e-mail message.
3. In the To field, key **a partner's e-mail address**.
4. In the Subject text box, key **Traditional Home photo shoot**.
5. In the Message area, key **Traditional Homes magazine is doing an article on AllWood for their May issue. Two members of their staff will be arriving next Friday. Could you let George's staff know? They will have the shop in order.**
6. Click on the Follow Up button  on the Message Tab on the Ribbon and click on the **Flag for Recipients** option. The Custom window appears.

Figure 5-6
The Custom window



7. Leave the default options and click on the **OK** button.
8. Click on the **Send** button.

Exercise 5-13 DELAY DELIVERY OF A MESSAGE

There may be occasions when you want to delay the delivery of an e-mail message. An example could be a student who would like to e-mail his or her parents at the beginning of a school year, but wanted to write the message to remove it from his or her task list. You can delay the delivery of an e-mail message by clicking on the Delay Delivery button on the Options tab on the Ribbon.

1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click on the **New** button on the Standard toolbar to create a new e-mail message.
3. In the To field, key **a partner's e-mail address**.
4. In the Subject text box, key **Delayed Message**.
5. In the Message area, key **Delayed message**.
6. Click on the Delay Delivery button  on the Options tab on the Ribbon. The Message Options window appears with the Do not deliver before option checked.
7. Select tomorrow morning at 9:00 A.M. from the drop-down list.
8. Click on the **Close** button.
9. Click on the **Send** button.



NOTE

If you are using a Microsoft Exchange server, you may close Outlook and the message will be sent. If you are using a POP3 or IMAP account, you must have Outlook open and be connected to the Internet to send the message.

Exercise 5-14 REQUEST READ AND DELIVERY RECEIPTS

There may be occasions when you want to ensure that e-mail messages that you sent were delivered and read. In these cases, you can request that you receive a receipt of the e-mail by selecting it on the Options tab on the Ribbon. A delivery receipt informs you when a message is delivered to the recipient's e-mail box and a read receipt tells you when the recipient read your e-mail message.

1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click on the **New** button on the Standard toolbar to create a new e-mail message.
3. In the To field, key **a partner's e-mail address**.
4. In the Subject text box, key **Delivery and Read Receipt**.
5. In the Message area, key **Delivery and Read Receipt**.
6. Click on the **Options** tab on the Ribbon.
7. Click on the checkbox next to Request a Delivery Receipt and Request a Read Receipt.
8. Click on the **Send** button.



NOTE

When you select a read receipt, the recipient is asked if they want to send a receipt. Therefore, you are not guaranteed to receive a receipt if they select the No option.

Exercise 5-15 CREATE E-MAIL POLLS USING STANDARD BUTTONS

There may be occasions when you want to poll your employees or coworkers regarding different company events or policies. You can use polls by clicking on the Use Voting Buttons button on the Options tab on the Ribbon.

1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click on the **New** button on the Standard toolbar to create a new e-mail message.
3. In the To field, key **a partner's e-mail address**.
4. In the Subject text box, key **Pizza Party**.
5. In the Message area, key **Will you attend the Pizza Party on Saturday?**
6. Click on the **Options** tab on the Ribbon.
7. Click on the Use Voting Buttons button  on the Options tab on the Ribbon. From the drop-down list, click on the **Yes;No** option.
8. Click on the **Close** button.
9. Click on the **Send** button.



NOTE

When the recipient receives the message, they will have the opportunity to vote yes or no.

Exercise 5-16 CREATE E-MAIL POLLS USING CUSTOM BUTTONS

There may be occasions when you want to poll your employees or coworkers regarding different company events or policies. You can be more creative and customize the buttons for your polls by clicking the Custom option from the Options tab.

1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click on the **New** button on the Standard toolbar to create a new e-mail message.
3. Click on the **Options** tab on the Ribbon.
4. Click on the Use Voting Buttons button  on the Options tab on the Ribbon. From the drop-down list, click on the **Custom** option. The Message Option window appears with the Use voting buttons option checked. Here, you can type the options you would like to use separated by a ; (semicolon).
5. Click on the **Close** button.
6. Close the New Message window without saving or sending the message.

Exercise 5-17 REQUEST REPLIES TO BE SENT TO ANOTHER E-MAIL ADDRESS

There may be occasions when you want replies to messages to go to another e-mail address. In these cases, you can change the reply-to address by clicking on the Direct Replies To button on the Options tab on the Ribbon.

1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click on the **New** button on the Standard toolbar to create a new e-mail message.
3. In the To field, key **a partner's e-mail address**.
4. In the Subject text box, key **Direct Replies to Another E-mail Address**.
5. In the Message area, key **Direct Replies to Another E-mail Address**.
6. Click on the **Options** tab on the Ribbon.
7. Click on the Direct Replies To  button on the Options tab on the Ribbon. The Message Options window appears with the Have replies sent to: checkbox checked.
8. In the Have replies sent to: field, key **another partner's e-mail address**.
9. Click on the **Close** button.
10. Click on the **Send** button.



Organizing Mail Folders

Outlook lets you create separate folders for specific types of messages. For example, you might want to create separate folders for your personal or work-related messages. You can then move relevant Inbox items into those folders. You can also rename and move folders, placing them in various locations in the folder hierarchy. Older files can be archived for long-term storage.

Exercise 5-18 CREATE AND MOVE MAIL FOLDERS

When you create a new folder, it is typically created under the Inbox folder in the folder list. You can create a folder by:

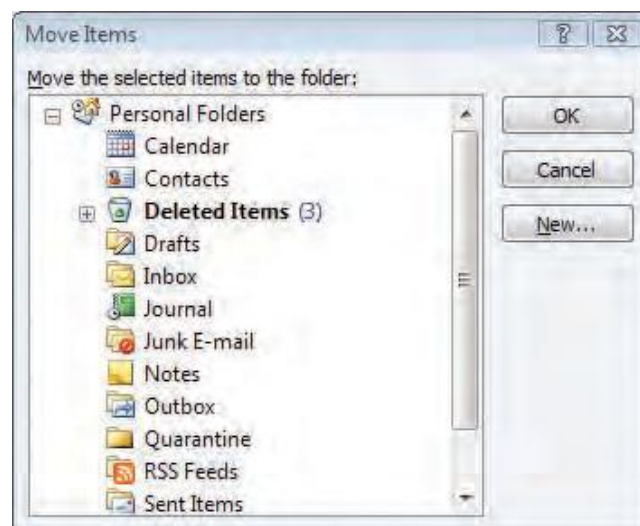
- Clicking on the File, New, Folder task path.
 - Clicking on the New button and New Folder.
 - Right-clicking on your Inbox and selecting the New Folder option.
 - Clicking on the New button in the Move Items window.
1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
 2. Click on the **New** button on the Standard toolbar to create a new e-mail message.
 3. In the To field, key **your e-mail address**.
 4. In the Subject text box, key **Creating Folders**.
 5. In the message area, key **This message will be moved**.
 6. Click on the **Send/Receive** button if you have not received the e-mail message.
 7. Right-click on the Creating Folders message and click on the **Move to Folder** option. The Move Items window appears.



TIP

You can also move messages by clicking them and dragging them into existing folders.

Figure 5-7
The Move Items window



8. Click on the New button . The Create New Folder window appears.

Figure 5-8
The Create New Folder window

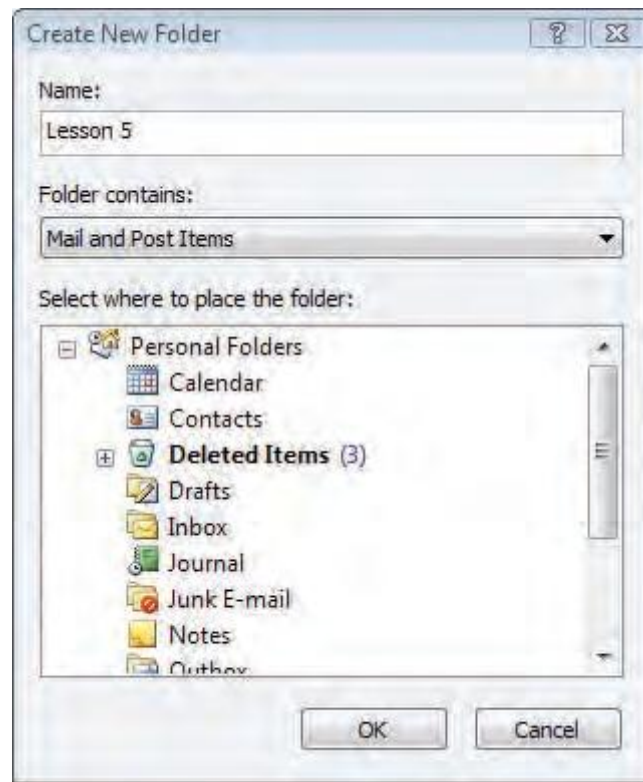


Figure 5-9
The Lesson 5 Folder at the same level as the Inbox in Personal Folders



9. In the Name field, key **Lesson 5**.
10. Click on the **OK** button. The Lesson 5 folder was created under the Inbox folder.
11. Click on the **OK** button to move the e-mail message.
12. Click on the **Lesson 5** folder and drag it into Personal Folders.
13. Your Lesson 5 folder is on the same level as your Inbox.

Exercise 5-19 MOVE MAIL BETWEEN FOLDERS

There may be occasions when you move mail to an incorrect folder, so you may have to move it to another folder. You can:

- Press **Ctrl+Shift+V** while an e-mail message is selected.
- Right-click on an e-mail message and click on the Move to Folder option.
- Use the task path Edit, Move to Folder.

1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click on the **Sent Items** folder in the Mail folders pane.
3. Right-click on the **Creating Folders** e-mail message and click on the **Move to Folder** option.
4. Click on the **Lesson 5** folder and click on the **OK** button.

Exercise 5-20

SPECIFY WHERE A COPY OF A SENT MESSAGE IS SAVED

There may be occasions when you want mail that was for specific purposes to be saved to a folder other than the default Sent Messages folder.

1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click on the **New** button on the Standard toolbar to create a new e-mail message.
3. In the To field, key **a partner's e-mail address**.
4. In the Subject text box, key **Sent Message Saved to Lesson 5 folder**.
5. In the message area, key **Sent Message Saved to Lesson 5 folder**.
6. Click on the **Options** tab on the Ribbon.
7. Click on the Save Sent Item button  on the Options tab on the Ribbon and click on the **Other Folder** option. The Select Folder window appears.
8. Click on the **Lesson 5** folder and click on the **OK** button.
9. Click on the **Send** button.



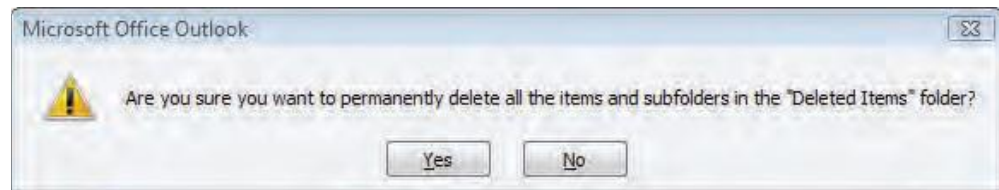
Exercise 5-21

EMPTY THE DELETED MAIL FOLDERS

When you delete items in Outlook, they are not immediately deleted. Deleted items are moved to the Deleted Items folder. Therefore, you must empty the Deleted Items folder to permanently delete items in Outlook. The Deleted Items folder is similar to the Recycle Bin in Windows.

1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click on the **Lesson 5** folder.
3. Click on the **Sent Message Saved to Lesson 5** folder item to select it and press **[Delete]**. The e-mail message appears in your Deleted Items folder.
4. Right-click on the **Deleted Items** folder and click on the **Empty "Deleted Items" Folder** option. A prompt appears asking if you are sure you want to permanently delete all the items and subfolders in the "Deleted Items" folder.

Figure 5-10
The New Task form



5. Click on the **Yes** button.

Exercise 5-22 **MANAGE JUNK E-MAIL MESSAGES**

Sometimes mail arrives in your Inbox that is unsolicited advertisements or other unwanted messages. Outlook provides advanced filtering techniques to reduce the clutter caused by these types of messages.

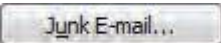
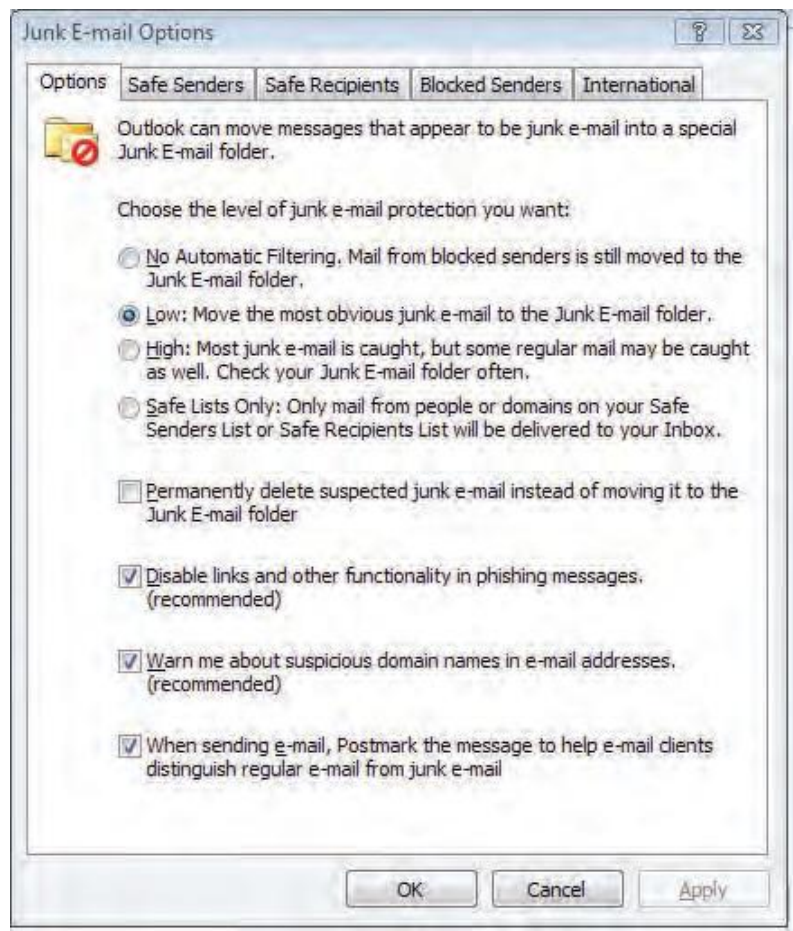
1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click on **Tools** from the menu bar and click on the **Options** item. The Options dialog box appears.
3. Click on the Junk E-mail button . The Junk E-mail Options window appears.

Figure 5-11
The Junk E-mail
Options window



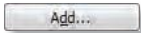
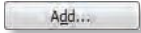
**NOTE**

If you would like to empty your Junk E-mail folder, you can right-click on it and click on the Empty "Junk E-mail" Folder option. If you receive a message in your Junk E-mail folder that is not junk, you can right-click on the message and move your mouse over the Junk E-mail Option and click on the Mark as not Junk option.

Add...

**TIP**

You can use the **Ctrl+Alt+J** shortcut to quickly mark a message as Not Junk E-mail.

4. Click on the **Safe Senders** tab.
5. Click on the Add button . The Add Address or Domain window appears.
6. Key a **partner's e-mail address** into the text box and click on the **OK** button.
7. Click on the Blocked Senders tab.
8. Click on the Add button . The Add Address or Domain window appears.
9. Key **phishing@phishing.com** into the text box and click on the **OK** button.
10. Click on the **OK** button.

Creating, Modifying, and Removing Rules to Manage E-mail Messages

Rules in Outlook allow users to automate many e-mail tasks. You can use rules to automatically move, delete, categorize, and forward messages. You create rules in Outlook following a few steps in the Rules Wizard. Rules have three parts: the condition, action, and exceptions. The condition refers to the characteristics used to determine which messages are affected by the Rule. The action refers to what will happen to e-mail messages that meet the condition. The exception refers to the characteristics used to exclude e-mail messages that meet the original condition(s).

Once you have created a rule, it is easy to turn it on or off. Additionally, you can delete rules that are no longer valid.

Exercise 5-23

CREATE A RULE TO MOVE E-MAIL MESSAGES

You can create a rule to move e-mail message to a specific folder by selecting Rules and Alerts from the Tools menu.

1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click the Personal Folders option.
3. Click on the drop-down arrow next to the **New** button on the Standard toolbar and click on **Folder** from the drop-down menu. The New Folder dialog box is displayed.

4. Key the name, **Lesson 5 Conference**. Click on the **OK** button to create the folder and close the New Folder dialog box.
5. Click **Tools** on the menu bar and click the **Rules and Alerts** option from the drop-down menu. The Rules and Alerts dialog box appears.
6. Click the New Rule button . The Rules Wizard will appear.

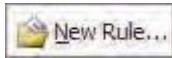
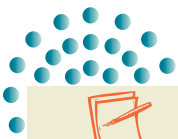


Figure 5-12
The Rules Wizard

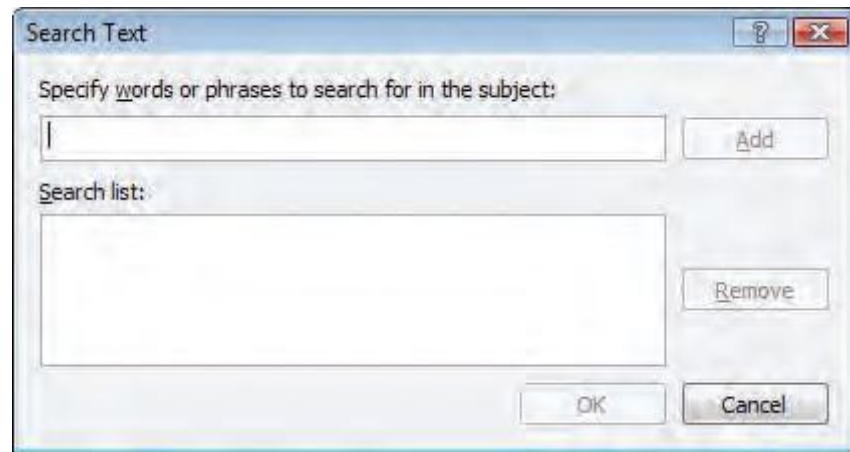


NOTE

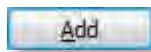
You can see an example of what each rule does after selecting it by viewing the example in the Step 2 area.

7. In the Stay Organized category, click on the **Move messages with specific words in the subject to a folder** option.
8. Click on the **specific words** link under Step 2. The Search Text dialog box will appear.

Figure 5-13
The Search Text
dialog box



9. Key **conference** into the Specify words or phrases to search for in the subject: text field.

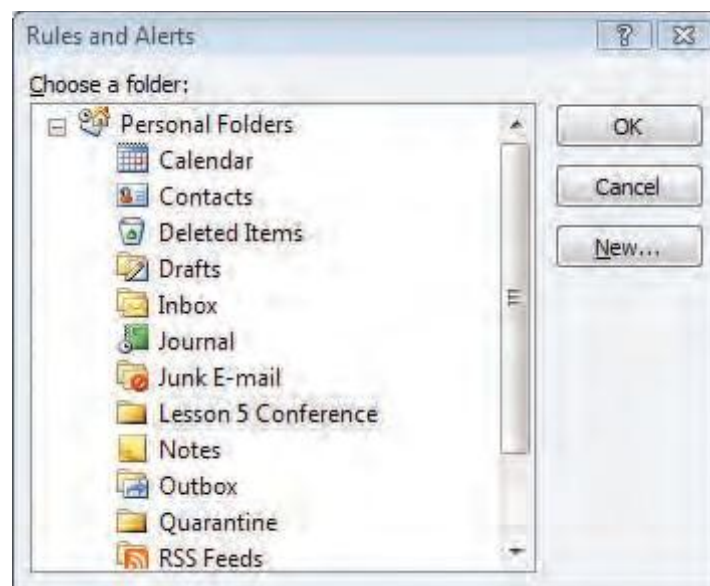


10. Click on the Add button . The word “conference” is enclosed by quotation marks and was added to the Search list.

11. Click on the **OK** button. The Rules Wizard will be displayed with the text “conference” as the specified search text.

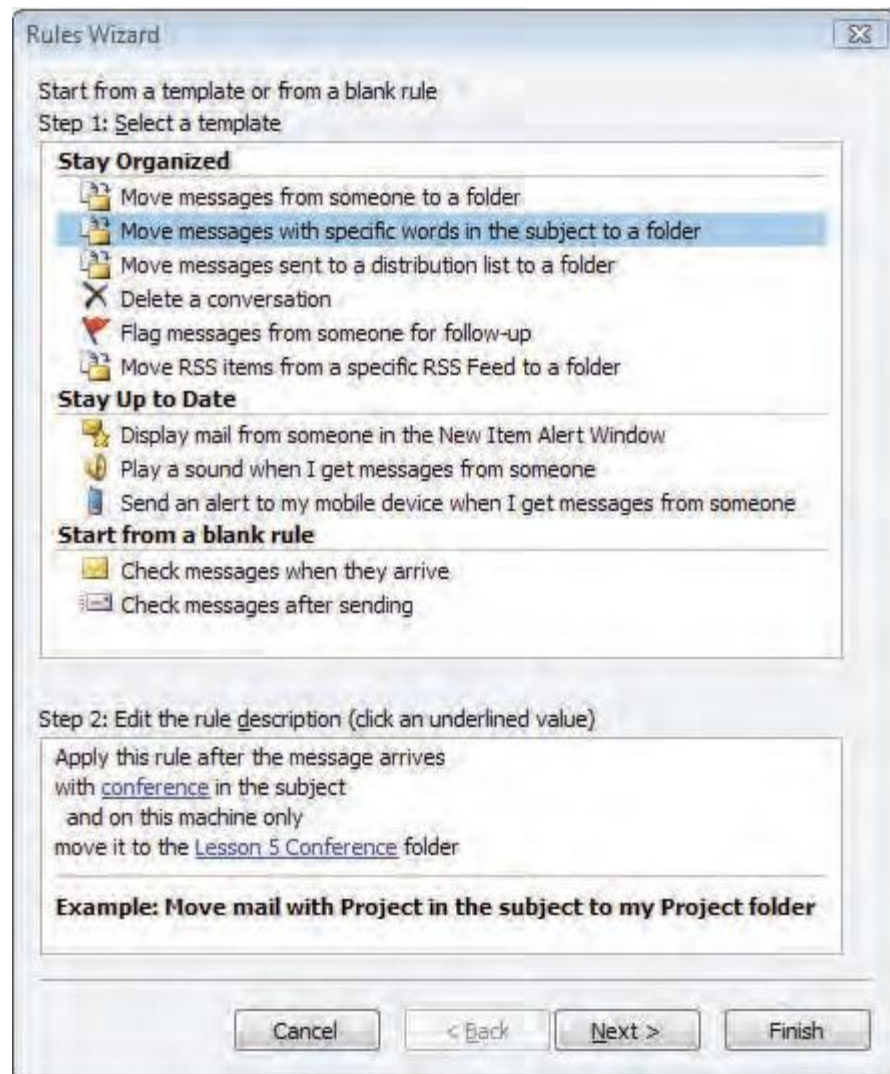
12. Click on the **specified folder** link under Step 2. The Rules and Alerts dialog box will open for you to select the folder to move the message to.

Figure 5-14
The Rules and Alerts
dialog box



13. Click the **Lesson 5 Conference** folder and click the **OK** button.

Figure 5-15
The Rules Wizard
after completing
Step 2



TIP

You can add more words to search for in this step if you forgot to add specific words earlier.

Next >

14. Click on the Next button .
15. The Rules Wizard will continue to the next step, asking which conditions you want to check. Since we will not make changes at this point, click on the Next button  to continue.
16. The Rules Wizard will continue to the next step, asking what you want to do with the message. Since we will not make changes at this point, click on the **Next** button to continue.
17. The Rules Wizard will continue to the next step, asking if there are any exceptions. We will not specify any exceptions at this point, so click on the **Next** button to continue.

**TIP**

It is a good idea to examine the rule at this point to ensure it is correct.

**NOTE**

Rules have three basic parts: a condition, action, and exception. The condition refers to the characteristic(s) used to determine if the e-mail message will be affected by the rule. The action refers to what will happen to e-mail messages that meet the condition. The exception refers to the characteristics used to exclude e-mail messages that meet the original condition(s).

18. This is the last stage of the Rules Wizard. Key **Lesson 5 Conference** into the Step 1: Specify a name for this rule field.
19. Click on the Finish button to complete the rule.
20. Click the **OK** button to close the Rules and Alerts dialog box.
21. To test the Rule to ensure that it worked properly, click on the **New** button to create a new e-mail message.
22. In the To text field, key your e-mail address.
23. In the Subject field, key **Lesson 5 Conference Test**.
24. In the Body field, key **Rule test**.
25. Click on the **Send** button.
26. Click on the **Lesson 5 Conference** folder. Your e-mail message should be automatically placed in this folder.

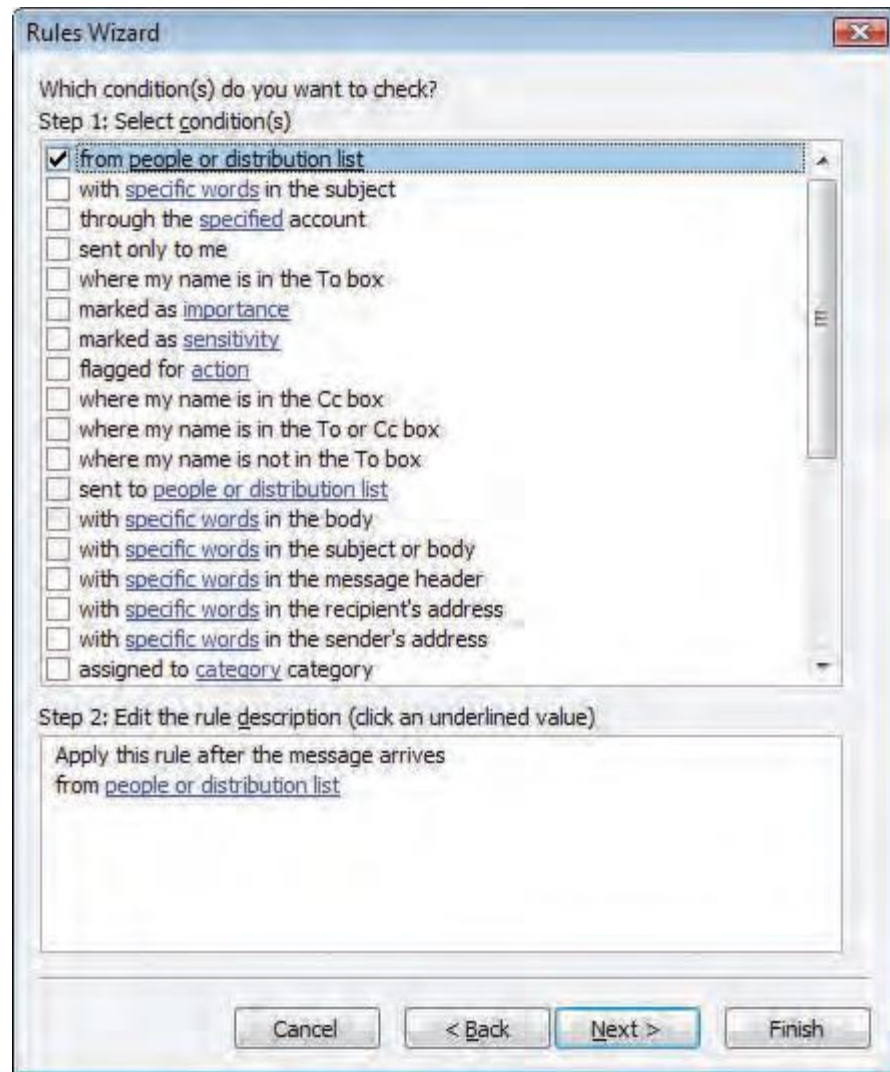
Exercise 5-24

CREATE A RULE TO DELETE ALL E-MAIL FROM A SENDER

You can create a rule to delete all e-mail messages from a specific sender by selecting Rules and Alerts from the Tools menu.

1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click **Tools** on the menu bar and click the **Rules and Alerts** option from the drop-down menu. The Rules and Alerts dialog box appears.
3. Click the New Rule button . The Rules Wizard will appear.
4. In the Start from a blank rule category, click on the **check messages when they arrive** option.
5. Click on the Next button .
6. Click on the checkbox next to the from people or distribution list option.

Figure 5-16
The Rules Wizard at
Step 1



TIP

You can also select an individual from your contacts list to save time if the individual or distribution list is one of your contacts.

7. Click on the **people or distribution list** link in the Step 2 area.
8. In the From text field, key **junk@isp.isp**.
9. Click on the **OK** button.
10. Click on the **Next** button.
11. Click on the **delete it** option and click on the **Next** button.
12. The Rules Wizard will continue to the next step, asking if there are any exceptions. We will not specify any exceptions at this point, so click on the **Next** button to continue.
13. This is the last stage of the Rules Wizard. Key **Delete Junk Mail** into the Step 1: Specify a name for this rule field.

**TIP**

You can create rules to delete messages from e-mail lists that you are listed on and have difficulty unsubscribing from.

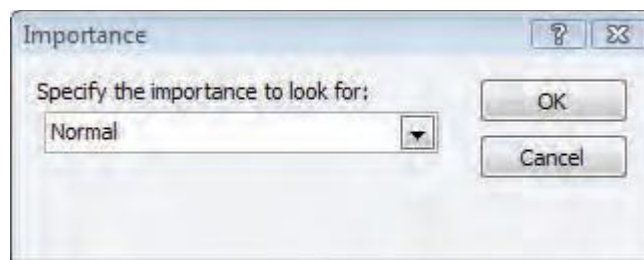
14. Click on the Finish button  to complete the rule.
15. Click the **OK** button to close the Rules and Alerts dialog box.

Exercise 5-25 CREATE A RULE TO CATEGORIZE E-MAIL

You can create a rule to categorize all e-mail messages by selecting Rules and Alerts from the Tools menu.

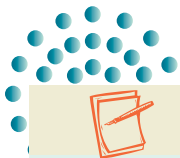
1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click **Tools** on the menu bar and click the **Rules and Alerts** option from the drop-down menu. The Rules and Alerts dialog box appears.
3. Click the New Rule button . The Rules Wizard will appear.
4. In the Start from a blank rule category, click on the **check messages when they arrive** option.
5. Click on the Next button .
6. Click on the checkbox next to the marked as importance option.
7. Click on the **importance** link under Step 2.
8. The Importance dialog box will appear.

Figure 5-17
The Importance dialog box



9. Click on the drop-down arrow  next to Normal, and click on **High**.
10. Click on the **OK** button.
11. Click on the Next button .
12. Click on the **assign it to a category** option.
13. Click on the **Category** link under Step 2. The Color Categories dialog box appears.

Figure 5-18
The Color Categories
dialog box



NOTE

If it is the first time you are using a color category, you will be asked to rename it. It is good practice to give categories descriptive names.

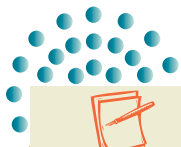
14. Click on the checkbox next to Blue Category and click on the **OK** button.
15. Click on the **Next** button to continue.
16. The Rules Wizard will continue to the next step, asking if there are any exceptions. We will not specify any exceptions at this point, so click on the Next button to continue.
17. This is the last stage of the Rules Wizard. Key **High Importance Messages** into the Step 1: Specify a name for this rule field.
18. Click on the **Finish** button to complete the rule.
19. Click the **OK** button to close the Rules and Alerts dialog box.

Exercise 5-26 CREATE A RULE TO FORWARD E-MAIL

You can create a rule to forward e-mail messages by selecting Rules and Alerts from the Tools menu.

1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click **Tools** on the menu bar and click the **Rules and Alerts** option from the drop-down menu. The Rules and Alerts dialog box appears.
3. Click the New Rule button . The Rules Wizard will appear.

4. In the Start from a blank rule category, click on the **check messages when they arrive** option.
5. Click on the Next button .
6. Click on the checkbox next to the where my name is in the To box option.
7. Click on the **Next** button.
8. Click on the checkbox next to the forward it to people or distribution list option.
9. Click on the **people or distribution list** link under Step 2. The Rule Address dialog box appears.
10. In the To text field, key **backup@isp.isp**.
 11. Click on the **OK** button.
 12. Click on the **Next** button to continue.
 13. The Rules Wizard will continue to the next step, asking if there are any exceptions. We will not specify any exceptions at this point, so click on the **Next** button to continue.
14. This is the last stage of the Rules Wizard. Key **My Backup** into the Step 1: Specify a name for this rule field.
15. Click on the **Finish** button to complete the rule.
16. Click the **OK** button to close the Rules and Alerts dialog box

**NOTE**

You can enter another e-mail address that is located in your contacts. This feature is useful to back up specific e-mail messages.

Exercise 5-27 TURN OFF RULES

You can turn a rule off by selecting Rules and Alerts from the Tools menu.

1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click **Tools** on the menu bar and click the **Rules and Alerts** option from the drop-down menu. The Rules and Alerts dialog box appears.
3. Uncheck the My Backup rule by clicking on the checkbox next to it.
4. Click the **OK** button to close the Rules and Alerts dialog box.

Exercise 5-28 DELETE RULES

You can delete a rule by selecting Rules and Alerts from the Tools menu.

1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click **Tools** on the menu bar and click the **Rules and Alerts** option from the drop-down menu. The Rules and Alerts dialog box appears.

3. Click on the **High Importance Messages Rule** to select it.
4. Click on the Delete button  to remove the rule.
5. When asked to confirm the deletion, click on the **Yes** button.
6. Click the **OK** button to close the Rules and Alerts dialog box.

Locating Office Outlook 2007 Items by the Search Feature

Even though we can work with our e-mail efficiently by using folders and automatically manage e-mail with rules, it is possible that we may lose a critical e-mail. Outlook has an Instant Search feature that allows you to search through all of your e-mail folders instantly.

Exercise 5-29 SEARCH ALL E-MAIL FOLDERS IN A SINGLE SEARCH



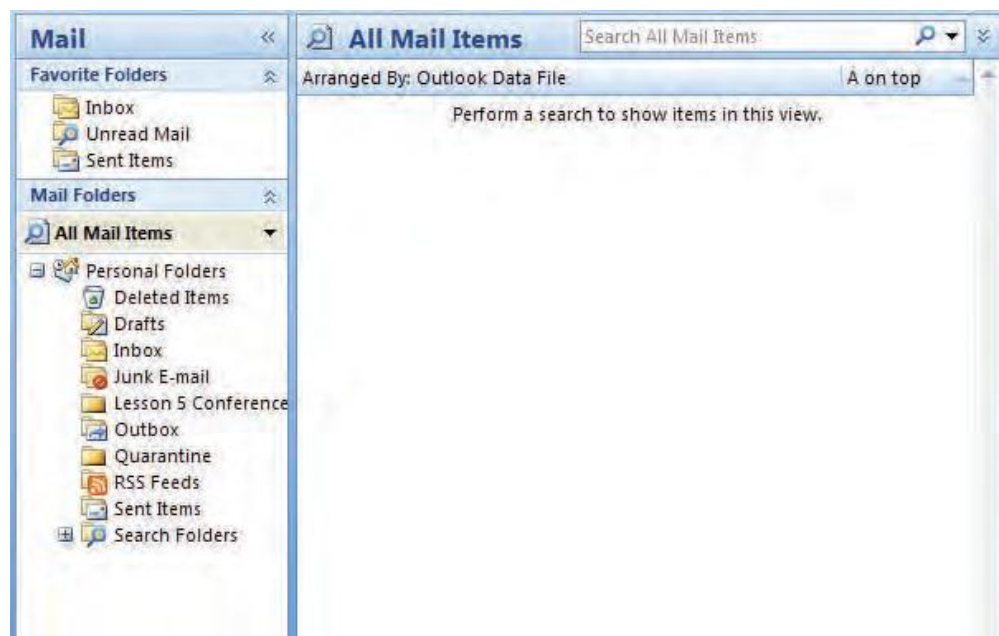
NOTE

The Instant Search feature provides fast results. However, the results are based on an index that is created. Therefore, items that are not indexed will not be found by the Instant Search feature. Outlook automatically indexes messages in the background while your computer is idle.

You can search all e-mail folders in a single search by clicking on the All Mail Items option under the Mail Folders and keying your search text into the Instant Search text field.

1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click on the **All Mail Items** option under the Mail folders.

Figure 5-19
The All Mail Items
Instant Search

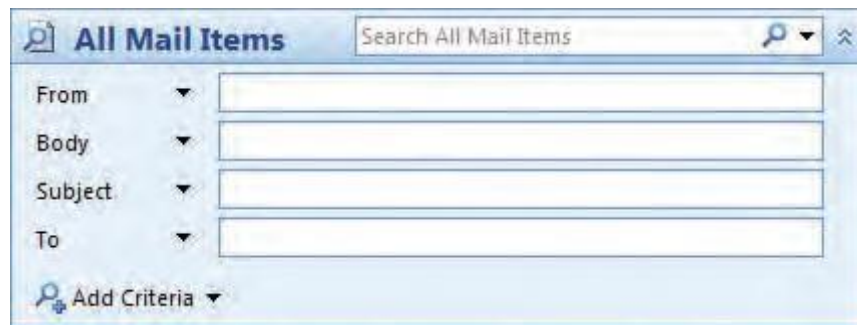


**TIP**

You can be more specific in your search using the query builder. Expand the query builder by clicking on the Expand the Query Builder button . The All Mail Items Instant Search box appears.

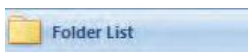
3. Key **Conference** into the Instant Search text field.
4. Now, all of the items found will appear.
5. To clear the search, click on the clear search button .

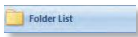
Figure 5-20
The All Mail Items
Instant Search dialog
box



Exercise 5-30 LOCATE ALL ITEMS RELATED TO A SPECIFIC PERSON

Even though you can search through all of your mail messages at once, there may be times when you know that you received an e-mail message from an individual, but are not completely sure what the specifics were. In these cases, it is good to search for all items that are related to a specific person.



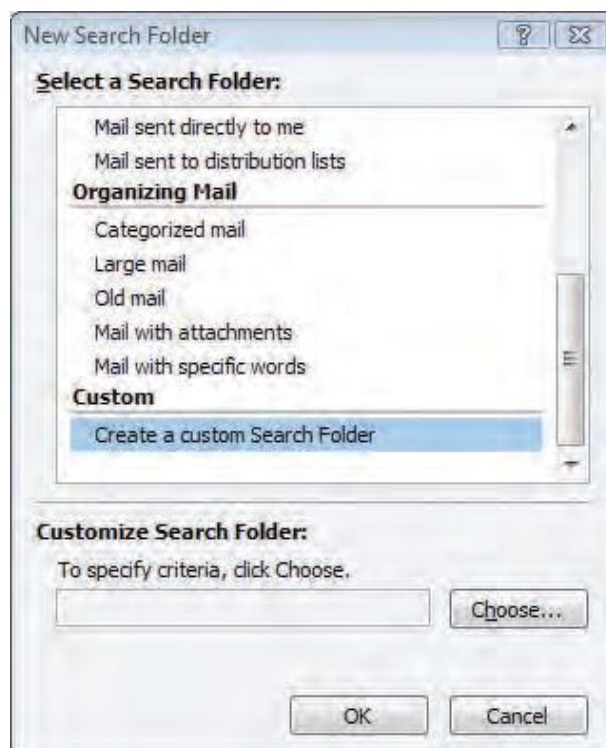
1. Switch to Outlook's Folder List component by clicking the Folder List button  on the Navigation bar.
2. Click on the Expand the Query Builder button .
3. In the From field, key your name.
4. Press **Enter**.
5. All of the items related to an individual will be listed.

Exercise 5-31 CREATE A CUSTOM SEARCH FOLDER

When using the Instant Search feature, you have to enter your search criteria each time you want to find information. Therefore, you can use a Custom Search Folder so that you do not need to search each time you want to find information. The Custom Search Folder is a virtual folder, which does not contain any items, but indexes them for quick reference.

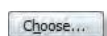
1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click on the arrow next to the New button on the Standard toolbar and click on the **Search Folder** option. The New Search Folder window appears.

Figure 5-21
The New Search
Folder window



NOTE

The Choose button will only be available after you click on the Create a custom Search Folder option.

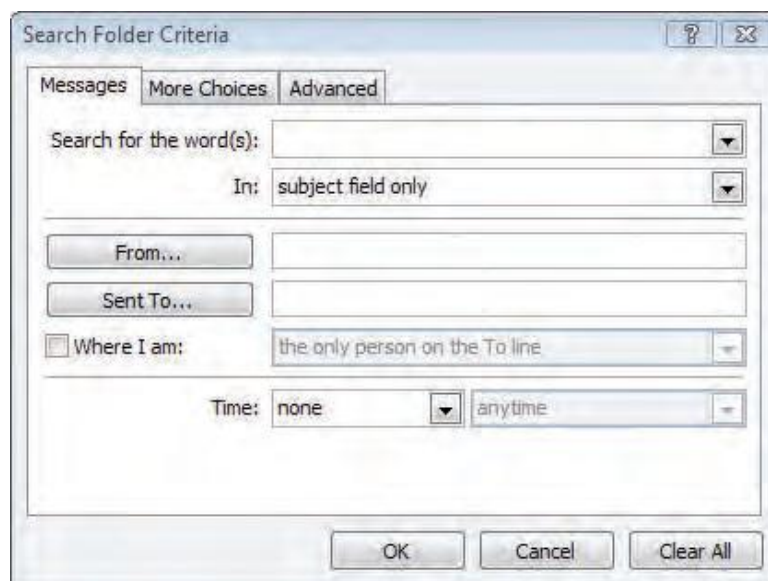
3. Scroll down to the bottom of the Select a Search Folder list and click on the **Create a custom Search Folder** option.
4. Click on the Choose button . The Custom Search Folder window appears.

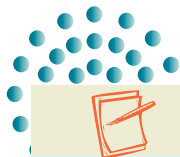
5. In the Name field, key **E-mail From Your Friend**.



6. Click on the Criteria button . The Search Folder Criteria window appears.

Figure 5-22
The Search Folder
Criteria window



**NOTE**

If you click on your newly created custom search folder, it will automatically display the results that meet the criteria specified.

7. In the **From** field, key **a friend's e-mail address**.
8. Click on the **OK** button to close the Search Folder Criteria window. Then click on the **OK** button to close the Custom Search Folder window. Click on the **OK** button to return to your mailbox.

Figure 5-23
The To-Do bar

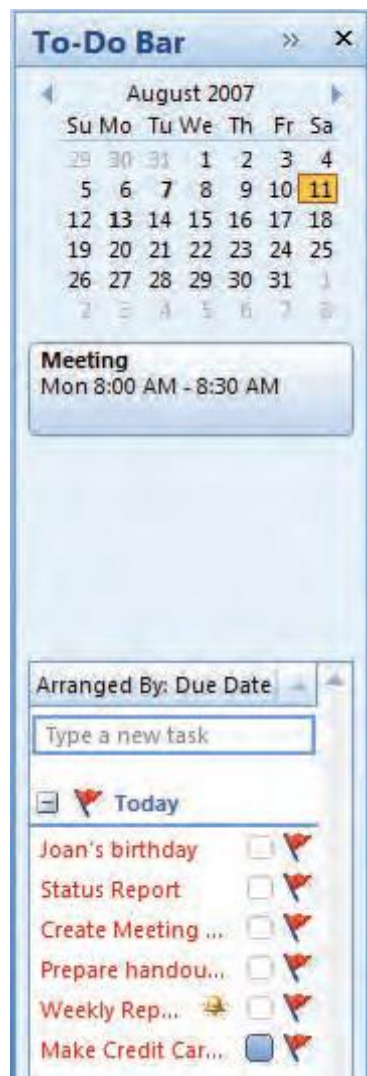
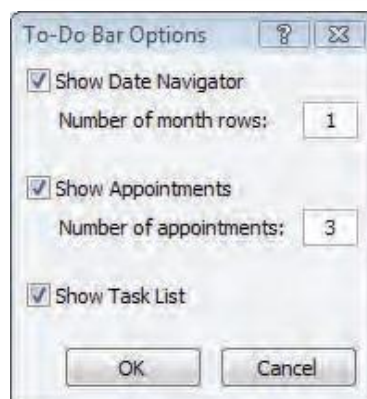


Figure 5-24
The To-Do Bar Options window



Customizing Your Outlook Experience

Now that you have become accustomed to many of Outlook's different features, you can also customize the appearance of Outlook to meet your needs. In many cases, this will help to make you more productive by having many different features on the screen at all times.

Exercise 5-32 **WORK WITH THE TO-DO BAR**

The To-Do bar is a new feature in Outlook 2007. It keeps your upcoming appointments and tasks available at all times.

1. If your To-Do bar is not already visible on the right side of Outlook, click on the task path **View, To-Do Bar, Normal**.
2. If you would like to minimize the To-Do bar, click on the task path **View, To-Do Bar, Minimize**.
3. If you would like to maximize the To-Do bar, click on the task path **View, To-Do Bar, Normal**.
4. Click on the task path **View, To-Do Bar, Options**. The To-Do Bar Options window appears.
5. Uncheck the checkbox labeled Show Task List.
6. Click on the **OK** button.
7. View the difference in the To-Do bar.

**TIP**

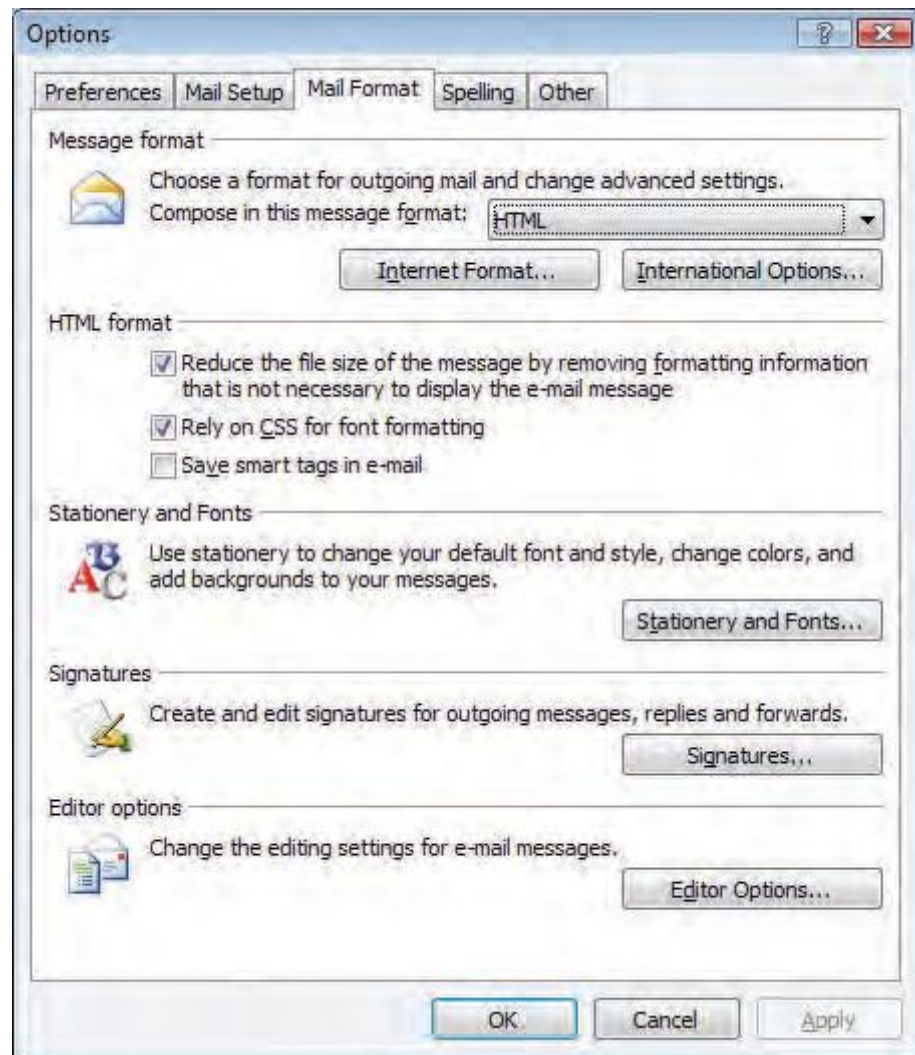
Customize the To-Do bar to maximize your productivity.

Exercise 5-33**SELECT THE DEFAULT FORMAT FOR MESSAGES**

You can format your e-mail messages in HTML (HyperText Markup Language), RTF (Rich Text Format), or plain text. If you use HTML or RTF, you will be able to format your e-mail messages with colors, sizes, and styles.

1. Click on **Tools** from the menu bar and click on the **Options** option. The Options dialog box appears.
2. Click on the **Mail Format** tab.

Figure 5-25
The Mail Format tab
in the Options dialog
box



3. In the Message Format area, click on the drop-down arrow next to the Compose in this message format: list. Click on the **Rich Text** option.
4. Click on the **Cancel** button to keep the HTML format.

Exercise 5-34 CONFIGURE RPC OVER HTTP

Configuring RPC over HTTP allows you to access your Microsoft Exchange account from anywhere on the Web using a browser. However, your system administrator must set up the Microsoft Exchange server and provide you with the appropriate options.

1. Click on the **Calendar** button in the Navigation pane.
2. Click on the task path **Tools, Account settings**. The Account Settings window is displayed.
3. Click on **More Settings**.
4. Click on the checkbox next to Connect to Microsoft Exchange using HTTP.
5. Click on the **Exchange Proxy Settings** button.
6. Key **the URL provided by your system administrator**.
7. If your system administrator requires you to use SSL, click on the Connect using SSL only checkbox.
8. If your system administrator requires you to do so, click on the checkbox next to Only connect to proxy servers that have this principal name in their certificate. If you were required to check this checkbox, key **msstd:** and **the URL provided by your system administrator**.
9. Click on either Basic Authentication or NTLM Authentication as directed by your system administrator.
10. Agree to the modifications made.

Lesson 5 Summary

- You can create a personal e-mail signature that is automatically added to all of your e-mails.
- You can create and manage multiple signatures.
- You can use electronic business cards with or in place of signatures.
- The Internal Out of Office Messages feature helps others within your company know when you are away.
- The External Out of Office Messages feature helps those outside of your company know when you are away.
- E-mail sensitivity and importance settings help your recipient understand how to treat an e-mail message.
- Restricting permissions to a message can prevent users from performing certain actions on a message (i.e., forwarding it to other recipients).

- You can delay delivery of messages so that they are sent at a specific date and time.
- Read and delivery receipts help the sender to know if a message was delivered and read.
- You can use e-mail polls to gather data.
- You can use mail folders to keep your data organized.
- Rules help to automate mundane tasks.
- The Instant Search feature helps you to find information quickly.

LESSON 5		Command Summary	
Feature	Button	Task Path	Keyboard
Personal Signature		Tools, Options, Mail Format, Signatures	
Insert Signature			
Out of Office Message		Tools, Out of Office Assistant	
Restrict Permissions		Microsoft Office Button, Permissions	
Follow-Up Flag			
Delay Delivery			
Voting Buttons			
Create a Folder		File, New Folder	
Move Mail Messages		Edit, Move to Folder	Ctrl + Shift + V
Empty Deleted Messages		Tools, Empty "Deleted Items" Folder	
Rules		Tools, Rules and Alerts	
New Search Folder		File, New, Search Folder	Ctrl + Shift + P
To-Do Bar Options		View, To-Do Bar, Options	

Concepts Review

True/False Questions

Each of the following statements is either true or false. Indicate your choice by circling T or F.

- T F 1. You can only manage one signature in Outlook.
- T F 2. You can use electronic business cards as signatures.
- T F 3. You need a Microsoft Exchange server to use Internal and External Out of Office messages.
- T F 4. Message sensitivity appears in the body of the message.
- T F 5. Low-importance messages have a blue down arrow next to them.
- T F 6. A digital ID is required to use the digital signature feature.
- T F 7. The recipient of an encrypted message needs the sender's digital ID to read the message.
- T F 8. Windows Rights Management Services Client is needed to set permissions on messages.
- T F 9. You cannot delay the delivery of a message.
- T F 10. There are three parts to each rule.

Short Answer Questions

Write the correct answer in the space provided.

1. How can you insert electronic business cards into e-mail messages?

2. What is the difference between internal and external out of office messages?

3. How do you modify the sensitivity level of an e-mail message?

4. What do digital signatures and encrypting messages have in common?

5. What do flags help with?

6. When delaying a message, what is a requirement if you are *not* connected to a Microsoft Exchange server?

7. What are the three parts of a rule?

Critical Thinking

Answer these questions on a separate page. There are no right or wrong answers. Support your answers with examples from your own experience, if possible.

1. What are the advantages and disadvantages of using a textual signature as opposed to an electronic business card as your signature?
2. When would you use polls?
3. What rules would you use to make your life easier? Why?

Skills Review

Exercise 5-35

Create a personal signature and set it as the default signature in all messages.

1. Click on the **Mail** button in the Navigation pane if the Mail list is not already displayed.
2. Create a new Signature by following these steps:
 - a. Click **Tools** on the menu bar and click on the **Options** item from the drop-down list.
 - b. Click on the **Signatures** button in the Signatures area of the Mail Format tab.
 - c. Click on the **New** button on the E-mail Signatures tab.
 - d. Key **Business 2** for the name of your signature.
 - e. Click on the drop-down lists next to New Messages and Replies/forwards and set **Business 2** to your default signature.
 - f. Your instructor will provide any additional information for you to key in for this signature.
 - g. Click on the **OK** button to close the Signatures and Stationery window.

Exercise 5-36

Create an internal and external out of office message.

1. Click on the **Mail** button in the Navigation pane.
2. Create a new internal out of office message by following these steps:
 - a. Click on the **Tools** menu and click on the **Out of Office Assistant** option.
 - b. Click on the **Send Out of Office auto-replies** option.
 - c. Click on the **Only send during this time range** option.
 - d. Select 5:00 P.M. approximately three weeks from today as your start time.
 - e. Select 8:00 A.M. approximately four weeks from today as your end time.
 - f. Click on the **Inside My Organization** tab if it is not already selected. Key **I am on a business trip with minimal access to e-mail. I will check my e-mail periodically, but will be back in a week.**
 - g. Click on the **OK** button.
3. Create a new external Out of Office message by following these steps:
 - a. Click on the **Tools** menu and click on the **Out of Office Assistant** option. The Out of Office Assistant window appears.
 - b. Click on the **Send Out of Office auto-replies** option.
 - c. Click on the **Only send during this time range** option.
 - d. Select 5:00 P.M. approximately three weeks from today as your start time.
 - e. Select 8:00 A.M. approximately four weeks from today as your end time.
 - f. Click on the **Outside My Organization** tab if it is not already selected. Key **I am on a business trip with minimal access to e-mail. I will check my e-mail periodically, but will be back in a week.**
 - g. Click on the **OK** button.

Lesson Applications

Exercise 5-37

Send a message that is confidential and important.

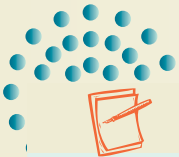
You began working on a confidential project in your branch. However, your computer is in an open area, so you feel that you should inform your colleagues if an e-mail is confidential and if it needs immediate attention.

1. Display your Mail Inbox.
2. Create a new message.
3. In the To field, key **your instructor's e-mail address**.
4. In the Subject field, key **Project Update**.
5. In the message area, key **The project manager wants to finish the project one week early. I think I can make the deadline; can you?**
6. Change the importance setting to High Importance.
7. Change the sensitivity level of the message to Confidential.
8. Send the message.

Exercise 5-38

Set security settings and message flags.

Since you started working on the confidential project, you felt that you should digitally sign messages to the other team members so that they know the e-mail messages you send are from you. You also want to encrypt messages for added security and do not want the message to be forwarded. You also feel that flagging the message will indicate to your recipient that an action is needed.



NOTE

This exercise requires you to have a digital ID and have exchanged it with your instructor.

1. Display your Mail Inbox.
2. Create a new e-mail message.
3. In the To field, key your **instructor's e-mail address**.
4. In the Subject field, key **Confidential Project**.
5. In the message area, key **Please submit the abstract of the project to the project manager by the end of the day tomorrow.**
6. Click on the **Options dialog box launcher** on the Message tab on the Ribbon and click on the **Security Settings** button.
7. Click on the checkbox next to the Encrypt message contents and attachments option and the checkbox next to the Add digital signature to this message option.

8. Change the permissions of the e-mail message so that the recipient cannot forward it.
9. Flag the message for follow-up with a due time of 4:00 P.M.
10. Send the message.

Exercise 5-39

Create a folder and rules to automatically sort your e-mail.

While working on the confidential project, you want all e-mail messages from individuals on the project to be automatically sorted into a folder for you.

1. Display your Mail Inbox.
2. Create a new folder named **Confidential Project**.
3. Create a new rule to automatically move messages from your instructor into the Confidential Project folder.
4. Create a new rule to automatically move messages with the subject Confidential Project into the Confidential Project folder.

Exercise 5-40 ♦ Challenge Yourself

Delay the delivery of an e-mail message, request delivery and receipt of the e-mail message, and use polls.

While working on the confidential project, you found that you need to take a poll of the members who can make a Saturday morning meeting. Since this e-mail message is important, you decided that you want to receive both a delivery and a read receipt. However, the project manager instructed you to send this e-mail message tomorrow at 9:00 A.M.

1. Display the Mail Inbox.
2. Create a new message.
3. In the To field, key **the e-mail address of three classmates and your instructor**.
4. In the Subject field, key **Saturday Morning Meeting Poll**.
5. In the message area, key **Can you make it to a meeting on Saturday at 9:00 A.M. for the Confidential Project?**
6. Add the Yes;No voting buttons to your message.
7. Change the settings of the e-mail message so that you receive both delivery and read receipts.
8. Set the e-mail message to be sent tomorrow morning at 9:00 A.M.
9. Send the e-mail message.

On Your Own

In these exercises you work on your own, as you would in a real-life work environment. Use the skills you've learned to accomplish the task—and be creative.

Exercise 5-41

Open Outlook and experiment with the different signature options. Write an e-mail to your instructor that explains when it would be beneficial to use the different settings. Be sure to explain your reasoning.

Exercise 5-42

Open Outlook and review the different delivery options. Write an e-mail to your instructor that explains when it would be beneficial to use the different settings. Be sure to explain your reasoning.

Exercise 5-43

Create a rule to copy all incoming e-mail messages with attachments to a folder of your choice. Ask a friend to send you an e-mail message with an attachment. When you receive the e-mail, check your folder to ensure your rule worked. Be sure to reply to your friend's e-mail to let them know you received the attachment and that your rule worked properly.

Lesson 6

Categorizing and Managing Outlook Data Files

OBJECTIVES

MCAS OBJECTIVES

In this lesson:

OL07 5.1.1
OL07 5.1.2
OL07 5.2.1
OL07 5.2.2
OL07 5.2.3
OL07 5.4.4

After completing this lesson, you will be able to:

1. Work with categories.
2. Create a data file.
3. Add an Outlook data file to a mail profile.
4. Remove an Outlook data file from a mail profile.
5. Change data file settings.

Estimated Time: 1 hour

When you assign categories to Outlook items such as tasks and appointments, you select from the master category list, which is the Outlook-supplied set of categories for grouping, filtering, finding, or sorting items. Outlook enables you to create your own categories that you can add to the Master Category list. After creating your categories, you can categorize messages, appointments, meetings, contacts, and tasks.

Outlook keeps your data saved as a Personal Folder file, which has a .pst file extension. You can create multiple personal folder files to help you manage multiple e-mail accounts efficiently. Therefore, you can direct messages from one e-mail account to a personal folder file and messages from the other e-mail account to another personal folder file.

Working with Categories

Outlook enables you to create categories to categorize messages, appointments, meetings, and contact information. This helps individuals manage information better by assigning it to different color categories and names.

Exercise 6-1 CREATE CUSTOM COLOR CATEGORIES AND ASSIGN CATEGORIES TO E-MAIL AND APPOINTMENTS

There are several ways to create a custom color category in Outlook. You can:

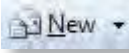
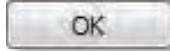
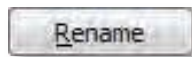
- Choose All Categories from the Categorize button.
 - Use the task path: Edit, Categorize, All Categories
1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
 2. Click on the New button  on the Standard toolbar to create a new mail message.
 3. Key your **e-mail address** into the To field.
 4. Click in the Subject field and key **Dentist Appointment**.
 5. In the message area, key **Tuesday, August 7 at 11:00 A.M.**
 6. Click on the **Send** button.
 7. Click on the **Send/Receive** button to receive the mail message.
 8. Once you receive the message, click on it to select it.
 9. Click on **Edit** from the menu bar and mouse over Categorize and click on the **All Categories** option. The Color Categories window appears.

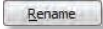


Figure 6-1
The Color Categories
window



10. Click on the checkbox next to Blue Category.



11. Click on the Rename button .

12. Key **Home** and press **Enter**.

13. Click on the OK button .

14. Switch to Outlook's Calendar component by clicking the **Calendar** button on the Navigation bar.

15. Click on the drop-down arrow next to the New button and click on the Appointment option.

16. In the Subject field, key **Meeting with Joan**.

17. In the Location field, key **Office 101**.

18. Set the start time to August 7 at 1:00 P.M.

19. Set the end time to August 7 at 2:00 P.M.

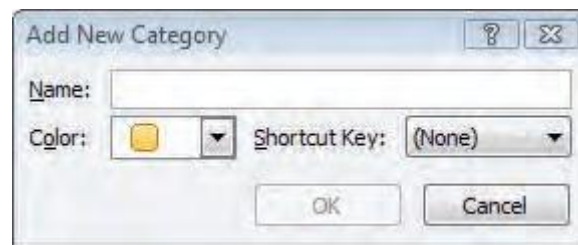


20. Click on the Categorize button  and select **All Categories**. The Color Categories window appears.



21. Click on the New button . The Add New Category window appears.

Figure 6-2
The Add New
Category window



22. In the Name field, key **Business**.

23. Click on the drop-down arrow next to Color and select **Red**.

24. Click on the OK button  in the Add New Category selection pane, and then Click on the OK button in the Color Category Pane..

25. Click on the **Save & Close** button.

Exercise 6-2 ASSIGN CATEGORIES TO MEETINGS, CONTACTS, AND TASKS

There are several ways to assign a color category in Outlook. You can:

- Choose All Categories from the Categories button.
- Use the task path: Edit, Categorize, All Categories

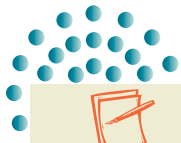
1. Switch to Outlook's Calendar component by clicking the **Calendar** button on the Navigation bar.

2. Click on the drop-down arrow next to the New button and click on the **New Meeting Request** option. The New Meeting window appears.
3. In the To field, key your **e-mail address**.
4. In the Subject field, key **Operations Meeting**.
5. In the Location field, key **Office 102**.
6. Set the start time to August 8 at 1:00 P.M.
7. Set the end time to August 8 at 2:00 P.M.
8. Click on the Categorize button  and click on **Green Category**.
8. Click on the **Send** button.
9. Switch to Outlook's Calendar component by clicking on the **Contacts** button on the Navigation bar.
10. Click on the drop-down arrow next to the New button and click on the **New Contact** option. The New Contact window appears.
11. In the Full Name field, key **Student 3**.
12. In the Company field, key **University**.
13. In the Job Title field, key **Manager**.
14. In the E-mail field, key **student3@isp.isp**.
15. In the Display as field, key **Student 3**.
16. Click on the Categorize button  and click on **Green Category**.
17. Click on the **Save & Close** button.
18. Switch to Outlook's Tasks component by clicking on the **Tasks** button on the Navigation bar.
19. Click on the drop-down arrow next to the New button and click on the **New Task** option. The New Task window appears.
20. In the Subject field, key **Make Credit Card Payment**.
21. Set the Due date to **August 9**.
22. Click on the Categorize button  and click on **Home Category**.
23. Click on the **Save & Close** button.

Exercise 6-3 SORT ITEMS BY COLOR CATEGORY

You can sort items by color category by using the task path: View, Arrange By, Categories.

1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.

**NOTE**

Messages without a color category will be listed at the top of your message list.

2. Click on **View** from the menu bar, mouse over Arrange By, and click on the **Categories** option.
3. Click on **View** from the menu bar, mouse over Arrange By, and click on the **Date** option. Now, your messages are sorted by Date.

Creating and Managing Outlook Data Files

You can create Outlook data files to help you better manage your personal folders. Each new data file folder acts as a new set of folders at the top level, similar to the Personal Folders data file folder that is automatically created when you first start Outlook.

Exercise 6-4 CREATE A DATA FILE

To create an Outlook data file, you can click on the arrow next to the New button and click on the Outlook Data File option.

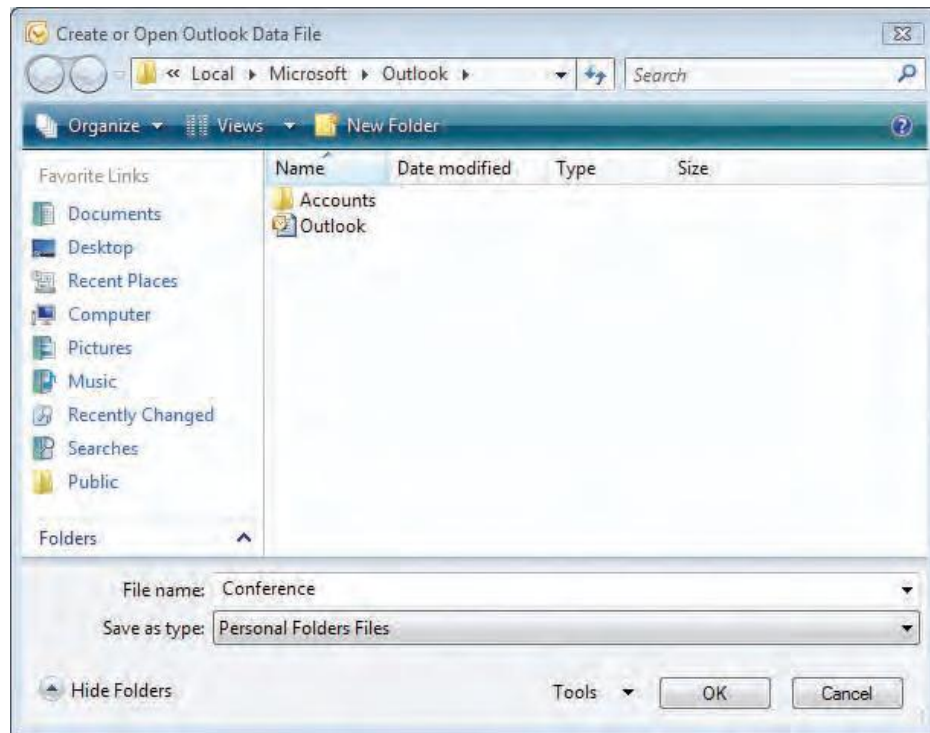
1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click the arrow next to the New button  and click on the **Outlook Data File** option. The New Outlook Data File window appears.

Figure 6-3
The New Outlook Data File window



3. Select the Office Outlook Personal Folders File (.pst) option if it is not already selected. Click on the OK button . The Create or Open Outlook Data File window appears.

Figure 6-4
The Create or Open
Outlook Data File
window



4. In the File name field, key **Conference**. Click on the OK button  to continue. The Create Microsoft Personal Folders window appears.

Figure 6-5
The Create Microsoft
Personal Folders
window



5. In the Name field, key **Conference 2007**. Click on the OK button  to continue. The Conference 2007 folder is displayed in the Navigation pane.
6. Click on the + (plus) sign next to the Conference 2007 folder to display its contents.

Figure 6-6
The newly created
Outlook data file
folder



Exercise 6-5 ADD AN OUTLOOK DATA FILE TO A MAIL PROFILE

To add an Outlook data file to a mail profile, you can click on the Tools option from the menu bar and click on Account Settings.

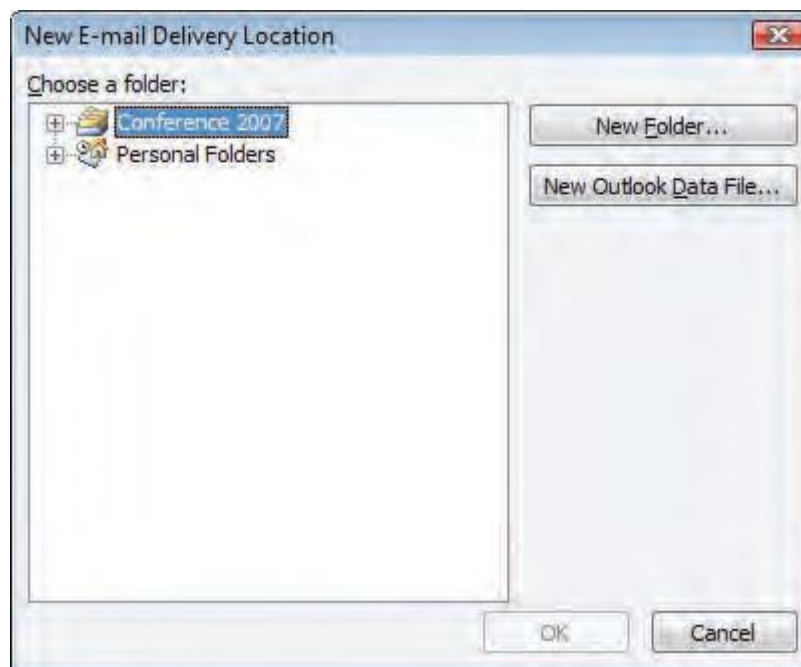
1. Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
2. Click on the **Tools** option from the menu bar and click on **Account Settings**. The Account Settings window appears. Your e-mail account will be listed under the E-mail tab. If you receive messages from multiple accounts, they will also be listed.

3. Click on your e-mail account.

Change Folder

4. Click on the Change Folder button **Change Folder**. The New E-mail Delivery Location window appears.

Figure 6-7
The New E-mail
Delivery Location
window



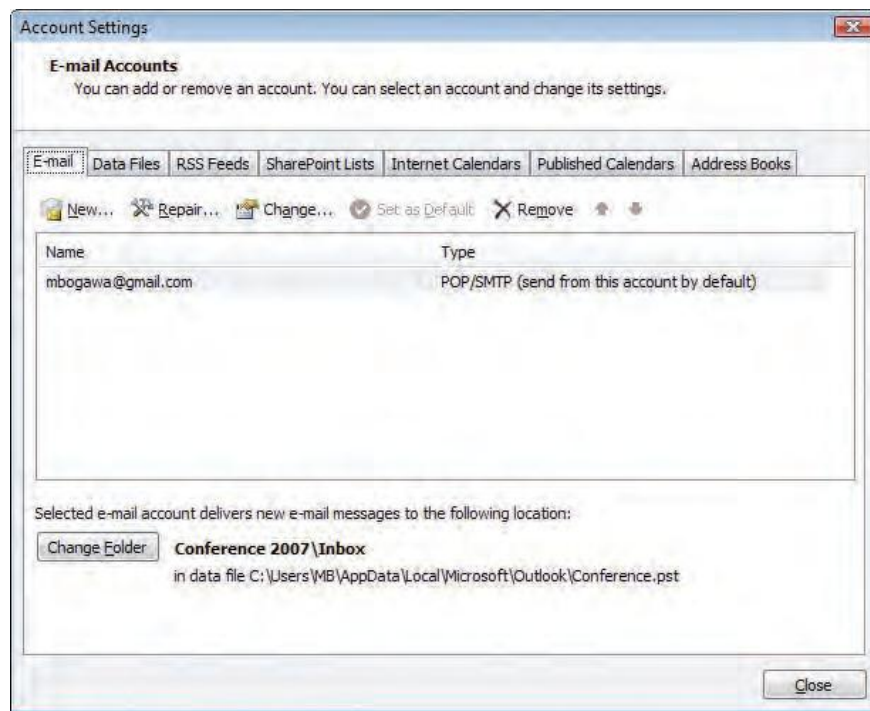
5. Click on the **Conference 2007** folder.

New Folder...

6. Click on the New Folder button **New Folder...**. The Create Folder dialog box appears.

7. In the Folder name field of the Create Folder dialog box, key **Inbox**.
8. Click on the OK button .
9. Click on the **Inbox** folder in the Conference 2007 folder.
10. Click on the OK button . In the Account Settings window, you will see that the new e-mail will be delivered to the Conference.pst Outlook data file.

Figure 6-8
The Account Settings window showing the new e-mail delivery location



TIP

You can create a new Outlook data file each year to ensure it does not grow too large and degrade performance.

11. Leave the Account Settings window open for the next exercise.

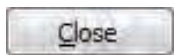
Exercise 6-6

REMOVE AN OUTLOOK DATA FILE FROM A MAIL PROFILE

To remove an Outlook data file from a mail profile, you can click on the Tools option from the menu bar and click on Account Settings.

1. The Account Settings window should be open from the previous exercise.
2. Click on the Change Folder button . The New E-mail Delivery Location window appears.
3. Click on the + (plus) sign next to the Personal Folders folder and click on the **Inbox** folder.

- Click on the OK button . In the Account Settings window, you will see that the new e-mail will be delivered to the Outlook.pst Outlook data file.



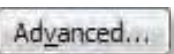
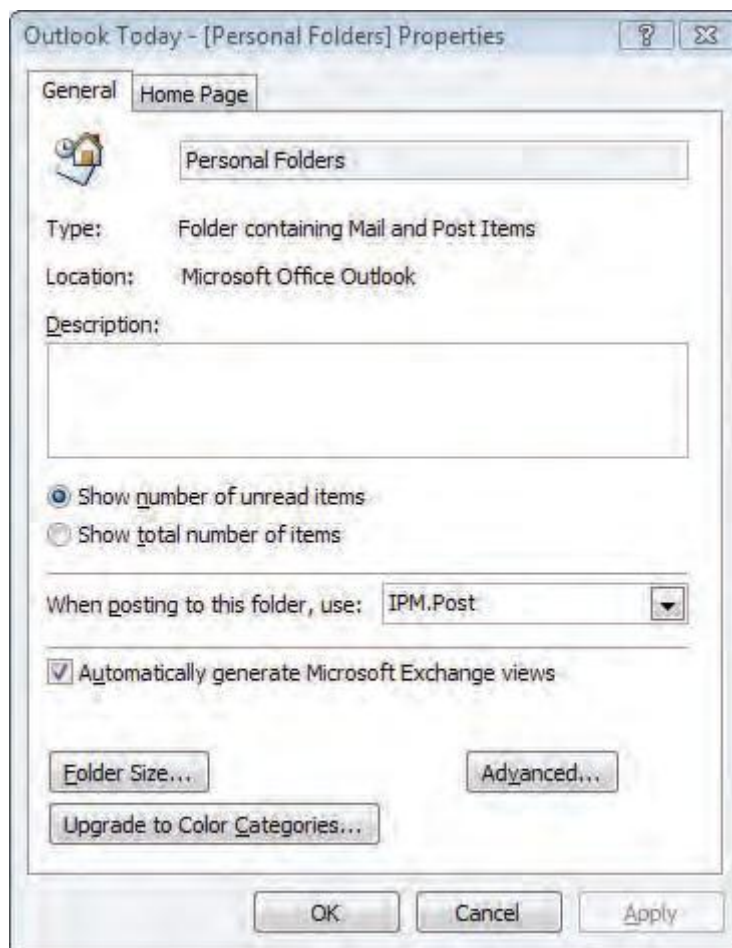
- Click on the Close button  to close the Account Settings window.

Exercise 6-7 CHANGE DATA FILE SETTINGS

To change data file settings, you can right-click on a personal folder and click on the Properties option.

- Switch to Outlook's Mail component by clicking the **Mail** button on the Navigation bar.
- Right-click on the Personal Folders folder and click on **Properties for "Personal Folders"**. The Outlook Today - [Personal Folders] Properties window will appear.

Figure 6-9
The Outlook Today-
[Personal Folders]
Properties window



- Click on the Advanced button . The Personal Folders window appears.

**TIP**

You can edit the name of your Personal Folder, create a password, and even compact the file to save space.

**NOTE**

You can enter a password here to password-protect your data file.

4. In the Name field, key **First Data File**.
5. Click on the Change Password button . The Change Password window appears.
6. Click on the Cancel button .
7. Click on the Compact Now button . An alert window appears indicating that the data file is compacting.
8. Click on the Cancel button to close the Personal Folders window.
9. Click on the **Cancel** button to close the Outlook Today - [Personal Folders] Properties window.

Lesson 6 Summary

- You can create new custom color categories by renaming an existing color category.
- You can use categories to differentiate between home, work, and other categories.
- You can apply categories to messages, appointments, meetings, and contacts.
- You can assign categories to e-mail messages after they are received.
- You can assign categories to appointments, meetings, and contacts while you create the new item.
- When you're sorting by color categories, items that are not categorized appear at the top of the list.
- Outlook data files are saved in Personal Folder File (.pst) format.
- Including multiple .pst files helps to keep multiple e-mail accounts organized.
- You can compact a .pst file in the Properties window of the data file.

LESSON 6**Command Summary**

Feature	Button	Task Path	Keyboard
Categories		Edit, Categorize, All Categories	
Sort by Categories		View, Arrange By, Categories	
Create an Outlook Data File		File, New, Outlook Data File	

Concepts Review

True/False Questions

Each of the following statements is either true or false. Indicate your choice by circling T or F.

- T F 1. You can create a new category by renaming an existing one.
- T F 2. You can assign categories to e-mail as it arrives.
- T F 3. You can assign e-mail, tasks, contacts, meetings, and appointments to categories as you create them.
- T F 4. Items that are not categorized appear at the top of a list when sorting by categories.
- T F 5. Each new Outlook data file acts as a new set of folders at the top level.
- T F 6. The Outlook Data File option is available from the New button.
- T F 7. You cannot compress Outlook data files.
- T F 8. You must edit your settings to accept e-mail to a new Outlook data file.
- T F 9. Outlook data files cannot be removed from e-mail profiles.
- T F 10. You can password-protect your Outlook data file from the Home Page tab of the Outlook Data File Properties.

Short Answer Questions

Write the correct answer in the space provided.

1. What is the task path to edit existing categories?

2. How is e-mail different from appointments, meetings, contacts, and tasks when working with categories?

3. What is the task path to sort items by category?

4. What is the filename extension for a personal folder file?

5. What does a + (plus) sign next to a folder in your mail folder indicate?

6. What window includes the option to change the delivery location of e-mail?
-
7. When working with the properties of a personal folder file, which button gives you access to compact your data file?
-

Critical Thinking

Answer these questions on a separate page. There are no right or wrong answers. Support your answers with examples from your own experience, if possible.

1. What categories would be useful for you to create?
2. How many Outlook Personal Folder files would you use and why?
3. When would passwords be useful with Outlook Personal Folder files?

Skills Review

Exercise 6-8

Add a new category and assign a task to that category.

1. Click on the **Tasks** button in the Navigation pane if the Task list is not already displayed.
2. Create a new task by following these steps:
 - a. Click the **New** button on the Standard toolbar.
 - b. In the Subject field, key **Balance Checkbook**.
 - c. Click on the drop-down arrow next to the Due date field and click on the date for next Friday.
 - d. Click on the **Categorize** button and click on the All Categories option.
 - e. Click on the checkbox next to Green Category and click on the **Rename** button.
 - f. Key **Finances** and press **[Enter]**.
 - g. Click on the **OK** button.
 - h. Click on the **Save & Close** button on the Task tab on the Ribbon.

Exercise 6-9

Create a new personal folder file, add it to a mail profile, and remove it from the mail profile.

1. Click on the **Mail** button in the Navigation pane.

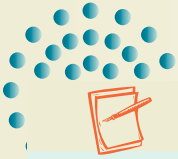
2. Create a new Outlook data file by following these steps:
 - a. Click the drop-down arrow next to the New button on the Standard toolbar and click on the **New Outlook Data File** option.
 - b. In the New Outlook Data File window, click on the **OK** button.
 - c. In the File name field of the Create or Open Outlook Data File window, key **Home E-mail** and click on the **OK** button.
 - d. In the Name field of the Create Microsoft Personal Folders window, key **Home** and click on the **OK button**.
3. Add the Outlook data file to your mail profile by following these steps:
 - a. Click on the **Tools** option from the menu bar and click on **Account Settings**.
 - b. Click on your e-mail account to select it.
 - c. Click on the **Change Folder** button.
 - d. Click on the **Home** folder.
 - e. Click on the **OK** button.
4. Remove the Outlook data file from your mail profile by following these steps:
 - a. The Account Settings window should be open from the previous exercise.
 - b. Click on the **Change Folder** button.
 - c. Click on the + (plus) sign next to the Personal Folders file and click on the **Inbox** folder.
 - d. Click on the **OK** button.
 - e. Click on the **Close** button to close the Account Settings window.

Lesson Applications

Exercise 6-10

Create a business contact.

You've decided to start creating your contacts under categories to help you stay organized. You recently met a potential business partner while out to lunch. You exchanged information and would like to input it into your contact list as a contact under the "Business" category.



NOTE

This exercise requires you to have completed Exercise 6-1 to have the Business category. If you have not completed Exercise 6-1, complete it prior to beginning this exercise.

1. Display your Contacts and create a new contact.
2. In the Full Name field, key **Michelle Nichols**.
3. In the Company field, key **Widget Incorporated**.
4. In the Job title field, key **Supervisor**.
5. In the E-mail field, key **michellenichols@isp.isp**.
6. In the Display as field, key **Michelle**.
7. Change the category of this contact to **Business**.
8. Save and close the contact.

Exercise 6-11

Create a home appointment.

You e-mailed yourself a reminder regarding your dental appointment in Exercise 6-1; however, you forgot to add it to your calendar as an appointment. Therefore, you will add your dentist appointment in your calendar under the Home category.



NOTE

This exercise requires you to have completed Exercise 6-1 to have the Home category. If you have not completed Exercise 6-1, complete it prior to beginning this exercise.

1. Display your Calendar.
2. Create a new appointment from 11:00 A.M. to 12:00 P.M. on August 7.
3. In the Subject field, key **Dentist Appointment**.
4. In the Location field, key **Dentist Office**.
5. Set the Category to **Home**.
6. Save and close the appointment.

Exercise 6-12

Create a new Outlook data file and compress it.

You noticed that the file size of your Outlook data file is large. Therefore, you decided to create a new Outlook data file and have all of your messages from this point forward sent there.

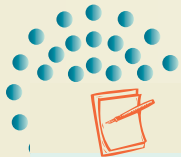
1. Display the Mail list.

2. Create a new Outlook data file named **Fiscal Year 2008**.
3. Set the folder name to **Fiscal Year 2008**.
4. Set all incoming e-mail messages on your account to go to the Inbox in this folder.
5. Rename the Inbox in your Personal Folders to **Archive of Fiscal Year 2007**.
6. Compress your Personal Folders data file.

Exercise 6-13 ♦ Challenge Yourself

Setting a default Outlook data file and categorizing messages sent to it.

You decided that your Outlook Inbox had not grown too large over time. In fact, you only had the Inbox for a few months. Therefore, you decided that it would be easier to work with one Inbox for the time being and categorize your messages.



NOTE

This exercise requires you to have completed Exercise 6-12 to have Archive of Fiscal Year 2007 and Fiscal Year 2008 folders. If you have not completed Exercise 6-12, complete it prior to beginning this exercise.

1. Display the Mail list.
2. Rename the Archive of Fiscal Year 2007 folder to **Inbox**.
3. Set all incoming e-mail messages on your account to go to the Inbox in the Personal Folders folder.
4. Send an e-mail message to yourself with the subject keyed as **Grocery Shopping**.
5. Ensure that you receive the e-mail and set its category to **Home**.
6. Create a task out of the Grocery Shopping e-mail and set the due date to two weeks from today.

On Your Own

In these exercises you work on your own, as you would in a real-life work environment. Use the skills you've learned to accomplish the task—and be creative.

Exercise 6-14

Create a new e-mail message to your instructor. In the body of this message, key your answer to the first Critical Thinking question from the end of the lesson. Be sure to expand on your answer with reasons why you would use these categories. Send this message to your instructor with an appropriate subject line.

Exercise 6-15

Create a new Outlook data file and add it to a mail profile. Ensure all incoming messages are delivered to an Inbox folder in your newly created data file. Ask a friend to e-mail you to ensure the incoming message is delivered to the correct folder. Change your settings back to default and delete your newly created Outlook data file.

Exercise 6-16

Open Outlook and experiment with the different Outlook data file settings. Write an e-mail to your instructor that explains when it would be beneficial to use the different settings. Be sure to explain your reasoning.

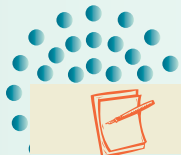
Unit 3 Applications

Unit Application 3-1

Create a new signature, add your business card to your signature, send an e-mail message with your signature, and categorize your e-mail message.

You can categorize your contacts into logical workgroups to increase your productivity.

1. Display your contacts and create a new contact.
2. Insert your information into the contact.
3. Save the contact.
4. Create a new textual signature with your information.
5. Add your business card to your signature.
6. Set the signature you just created to be your default New Message and Replies/forwards signature.
7. Create a new e-mail message, addressing it to your instructor.
8. For the subject, key **New contact information**.
9. In the message area, key **This is my new contact information as requested**.
10. Send the message.
11. Locate the message in your Sent Items folder.
12. Create a new category named **Contact** using the yellow color.
13. Assign the message you sent to the Contact category.



NOTE

Your instructor will provide you with an appropriate e-mail address.

Unit Application 3-2

Delay delivery, flag for follow-up, request read and delivery receipts, vote, and create folders and rules.

You decided to e-mail your coworkers to determine whether they are available for the orientation session on Sunday. Therefore, you decided to use an e-mail poll to determine whether they will be able to make it or not. Since this is an important message, you decided to flag the message for follow-up and receive receipts of both delivery and read. You also decided to use your advanced Outlook skills to create a folder and have the replies automatically sorted into it.

1. Display your Mail Inbox.
2. Create a new e-mail message, addressing it to your instructor.
3. In the subject field, key **Orientation**.

4. In the message area, key **Are you available for the Sunday orientation session?**
5. Add the Yes;No voting option to your e-mail message.
6. Add a flag for follow-up. Set the reminder to tomorrow at 12:00 P.M.
7. Check the options to ensure that you receive a read and delivery receipt.
8. Send the message.
9. Create a new folder named **Orientation Poll**.
10. Create a rule to ensure that all replies to the Orientation e-mail are moved into the Orientation Poll folder.

Unit Application 3-3

Create and manage Outlook data files.

You noticed that the file size of your Outlook data file is large. Therefore, you decided to create a new Outlook data file and have all of your messages from this point forward sent there.

1. Display the Mail list.
2. Create a new Outlook data file named **Home E-mail**.
3. Set the folder name to **Home E-mail**.
4. Create an Inbox in the Home E-mail folder.
5. Set all incoming e-mail messages on your account to go to the Inbox in the Home E-mail Inbox folder.
6. Compress your Home E-mail data file.
7. Change the properties of your Home E-mail data file to include a password of your choice.
8. Remove the password from your Home E-mail data file.
9. Set all of your incoming e-mail messages on your account to go to the Inbox in the Personal Folders Inbox folder.
10. Delete the Home E-mail data file.

Unit Application 3-4 ♦ Using the Internet

Setting a Default Outlook Data File and Categorizing Messages Sent to It

Imagine that you've just won the lottery. Plan an elaborate European vacation for yourself and three friends to celebrate. You'll be paying for all expenses yourself, but you want to be mindful of the costs. Although you're paying for your friends, you'll want to give them an idea of what everything will cost in case they would like to bring along a partner or spouse as well.

Plan your itinerary so that it includes at least three European cities. Make it at least a seven-day trip. Use the Internet to research airfares, hotel costs, meals, and other incidental expenses. For each city, select sights and points

of interests and create a daily schedule of activities. Develop an alternate plan for inclement weather. Research the local currency and current exchange rates and include those currencies in your daily budget.

After you've obtained your information, use Outlook for the following activities:

- Add your instructor and your three traveling companions to your contact list and create a distribution list for all four names. Create a signature for yourself that adequately describes your newfound financial status.
- Compose and send an e-mail message inviting your friends to join you in celebrating your good fortune, using the distribution list to address the message. Using the distribution list, send a second e-mail message describing the itinerary and the expenses for the trip. In both messages, use various message options.
- Create rules to ensure that all of your travel e-mail messages are categorized as Travel under any specific color. Create a Travel folder and rules to automatically move messages to a Travel folder. Create a Search folder to automatically find messages related to the trip.
- Pick a date on your calendar to schedule a pretrip meeting. Make your travel companions required attendees and your instructor an optional attendee. Set a reminder for the day before the meeting.
- Schedule the trip on your calendar, filling in various time blocks as appointments. You do not have to account for the entire day, but show major activities. Display the calendar in the most appropriate way to view the trip.
- Create a required task for each of your traveling companions. These might be such activities as getting a passport, buying traveling clothes, packing luggage, and so on. Assign a due date, a priority, and a reminder for each task, and include whatever task notes you think are appropriate. Create several tasks for yourself, as well.

Microsoft Office Objective Domain

TABLE A-1 Microsoft Office Outlook 2007 Activities Related to Lessons

Code	Activity	Lesson
1	Managing Messaging	1
1.1	Create and send an e-mail message	1
1.1.1	Send messages to multiple recipients	1
1.1.2	Reply to a message	1
1.1.3	Resend a message	1
1.1.4	Forward a message	1
1.2	Create and manage your signature and automated messages	5
1.2.1	Create and modify a personal signature	5
1.2.2	Create internal and external Out of Office Messages	5
1.3	Manage e-mail message attachments	1
1.3.1	Attach files and items to a message	1
1.3.2	Preview a message attachment in Office Outlook 2007	1
1.3.3	Save attachments to a specific location	1
1.3.4	Open a message attachment	1
1.4	Configure e-mail message sensitivity and importance settings	5
1.4.1	Set message sensitivity level	5
1.4.2	Set mail importance level	5
1.5	Configure e-mail message security settings	5
1.5.1	Digitally sign a message	5
1.5.2	Restrict permissions to a message	5
1.5.3	Encrypt a message	5
1.6	Configure e-mail message delivery options	5
1.6.1	Add or remove a flag for follow-up	5
1.6.2	Delay delivery of a message	5
1.6.3	Request read or delivery receipts	5
1.6.4	Create e-mail polls using standard or custom voting buttons	5
1.6.5	Request that replies be sent to a specific e-mail address	5

TABLE A-1 (continued)

Code	Activity	Lesson
1.7	View e-mail messages	1
1.7.1	Show, hide, or move the reading pane	1
1.7.2	Automatically preview messages	1
2	Managing Scheduling	3
2.1	Create appointments, meetings, and events	3
2.1.1	Create a one-time appointment, meeting, or event	3
2.1.2	Create a recurring appointment, meeting, or event	3
2.1.3	Create an appointment, meeting, or event from an e-mail message	3
2.1.4	Create an appointment, meeting, or event from a task	3
2.1.5	Mark an appointment, meeting, or event as private	3
2.2	Send meeting requests	3
2.2.1	Invite mandatory attendees to meetings	3
2.2.2	Invite optional attendees to meetings	3
2.2.3	Determine when attendees are available to meet	3
2.2.4	Track responses to meeting requests	3
2.2.5	Schedule meeting resources	3
2.3	Update, cancel, and respond to meeting requests	3
2.3.1	Change a meeting time	3
2.3.2	Add a meeting attendee	3
2.3.3	Modify one instance of a recurring meeting	3
2.3.4	Send meeting updates only to new attendees	3
2.3.5	Cancel a meeting	3
2.4	Customize Calendar settings	3
2.4.1	Define your work week	3
2.4.2	Display multiple time zones	3
2.4.3	Change time zones	3
2.4.4	Add predefined holidays to the Calendar	3
2.5	Share your Calendar with others	3
2.5.1	Configure Free/Busy privacy settings	3
2.5.2	Share your calendar with other Office Outlook 2007 users on your network	3
2.5.3	Send Calendar information in an e-mail message (send a calendar via E-mail)	3
2.5.4	Publish Calendar information to Office Online	3

TABLE A-1 (continued)

Code	Activity	Lesson
2.6	View other Calendars	3
2.6.1	View a Calendar shared by another Office Outlook 2007 user on your network	3
2.6.2	Subscribe to an Internet Calendar	3
2.6.3	View multiple Calendars in overlay mode	3
3	Managing Tasks	4
3.1	Create, modify, and mark tasks as complete	4
3.1.1	Create recurring tasks	4
3.1.2	Create a task from a message	4
3.1.3	Set the status, priority, and percent complete of a task	4
3.1.4	Mark a task as complete	4
3.1.5	Mark a task as private	4
3.2	Accept, decline, assign, update, and respond to tasks	4
3.2.1	Assign tasks to others	4
3.2.2	Respond to an assigned task	4
3.2.3	Send a status report on an assigned task	4
4	Managing Contacts and Personal Contact Information	2
4.1	Create and modify contacts	2
4.1.1	Create a contact from a blank contact	2
4.1.2	Create a contact from a message header	2
4.1.3	Create a contact from an electronic business card	2
4.1.4	Create a contact received as a contact record	2
4.1.5	Modify contact information	2
4.2	Edit and use an electronic business card	2
4.2.1	Edit an electronic business card	2
4.2.2	Send an electronic business card to others	2
4.2.3	Use an electronic business card as an automatic signature in messages	5
4.3	Create and modify distribution lists	2
4.4	Create a secondary address book	2
4.4.1	Create a secondary address book for personal contacts	2
4.4.2	Import a secondary address book from a file	2
5	Organizing Information	5, 6
5.1	Categorize Office Outlook 2007 items by color	6

TABLE A-1 (continued)

Code	Activity	Lesson
5.1.1	Categorize messages, appointments, meetings, contacts, and tasks by color	6
5.1.2	Sort Office Outlook 2007 items by color category	6
5.2	Create and manage Office Outlook 2007 data files	6
5.2.1	Create a data file	6
5.2.2	Add an Office Outlook 2007 data file to, or remove it from, a mail profile	6
5.2.3	Change data file settings	6
5.3	Organize mail folders	5
5.3.1	Create and move mail folders	5
5.3.2	Move mail between folders	5
5.3.3	Specify where a copy of a sent message is saved	5
5.3.4	Empty the Deleted Mail and Sent items folders	5
5.3.5	Manage Junk e-mail messages	5
5.4	Locate Office Outlook 2007 items by the Search feature	5
5.4.1	Search all e-mail folders in a single search	5
5.4.2	Locate all items related to a specific person by searching	5
5.4.3	Locate tasks or contacts	4
5.4.4	Search Office Outlook 2007 items by category	6
5.4.5	Create a custom Search Folder	5
5.5	Create, modify, and remove rules to manage e-mail messages	5
5.5.1	Create a rule to move e-mail messages	5
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appointment An activity occurring on a specific day and time that does not involve inviting people to attend or reserving a room. (3)

AutoPreview An Outlook option that displays the first few lines of e-mail messages directly in the Inbox. (1)

categories Color categories can be assigned to messages, contacts, appointments, and tasks across the Outlook components. (6)

contact A person, business, or organization with whom you correspond. (2)

Date Navigator A small calendar that appears above the Navigation pane. It displays views of one or more months. Each date that contains a scheduled item is shown in bold in the calendar. Arrows at the top of the Date Navigator allow you to change the displayed dates. (3)

delegate To assign a task request to someone else. (4)

digital ID A file that can be attached to a message to digitally sign it or prove that you were the author or to digitally encrypt the message to hide it from others as it is being sent. Sometimes referred to as a digital certificate. (5)

distribution list A grouping of contacts that facilitates serving invitations and announcements by e-mail. (2)

electronic business card A view of one of the contacts that you have stored in Outlook. This format can be attached to e-mails to make the information available to other Outlook users. (2)

encrypt A security method that cloaks a message by temporarily scrambling it into an unreadable form. (5)

event A Calendar activity that labels one or more days without any times being specified. (3)

Instant Search A new feature of Windows Vista and Microsoft Office 2007 that provides a fast, indexed searching tool. (5)

Internet Calendar An Internet standard for creating and sharing calendar information. (3)

Internet e-mail address An address that consists of the user's name, the @ symbol (known as the "at" sign), and the user's domain name. (1, 2)

mail profile An e-mail profile consists of e-mail accounts, data files, and information about where your e-mail is stored.

meeting A Calendar activity that involves inviting other people or reserving resources. (3)

meeting request An e-mail invitation that is sent to the Inbox of scheduled attendees allowing them to accept or decline or possibly propose new times. (3)

Microsoft Exchange Server A Microsoft server product that provides messaging and collaborative software services. Outlook is a client program to the Exchange server that will interchange messages among its users. (3)

Microsoft Office Online A free online service that integrates with the application's Microsoft Outlook Calendar Sharing Service features. (3)

Navigation pane The pane displayed at the far left of the Outlook window used for navigating between the program's different features and the folders used by those features. (1)

Online Help Outlook's Help feature makes use of the Microsoft Office Web site and other Microsoft sites directly within the program through keying topics in the Help Search box. (1)

out-of-office message A message that you can turn on or off to automatically reply to those who send you messages. A useful feature when you are out of your office for a period of time, to let people know that you will not be checking your e-mail. (5)

Personal Folders file A data file in Outlook containing all the information that you create, including messages, contacts, appointments, and tasks. (6)

poll A feature of Microsoft Exchange Server that allows users to vote in response to an e-mail message and tabulates the results. (5)

Reading pane An area displayed, by default, to the right of the Inbox, used to facilitate the reading of messages without opening them. (1)

recurring Occurring repeatedly; used to describe appointments, meetings, tasks, or events that repeat within the Calendar. (3)

Ribbon A structure in Microsoft Office 2007 programs that combines the functionality of menus and toolbars, meant to give easier access to program functions and features. (1)

RPC over HTTP A protocol that allows an Outlook client to access an Exchange server over either an intranet LAN or the public Internet. (5)

rule A user-configurable set of conditions that can be applied to organize incoming or stored e-mail messages. (5)

signature Text automatically added to an e-mail message that you send. (5)

task A personal or work-related activity that you want to track to completion. (4)

task request An e-mail message asking the recipient to complete a specified activity. (4)

To-Do List The list of tracked tasks that can be managed within the Task's component. (4)

vCard An Internet standard for creating and sharing contact information. (2)

Windows Live ID An account from Microsoft that allows you to sign in to MSN Messenger, MSN Hotmail, MSN Music, and other sites and services provided by Microsoft and its participating partners. (3)

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