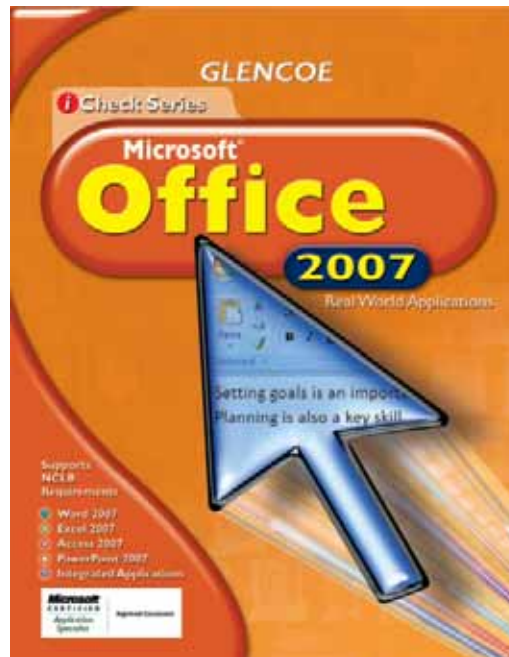


# Microsoft® Outlook 2007 Time and Resource Management



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## Key Concepts

- Compose and save a new message
- Set importance, sensitivity, format, and delivery options
- Insert, open, and save attachments
- Receive, read, reply, and forward e-mail
- Create and modify signatures
- Request read or delivery receipts
- Digitally sign and encrypt messages

## Standards

The following standards are covered in this lesson. Refer to pages xxiv and 715 of the Student Edition for a description of the standards listed here.

## ISTE Standards Correlation

## NETS•S

2a, 2b, 3b, 3c, 4b, 4c, 6a

Microsoft Certified  
Application Specialist  
Standards

## Outlook

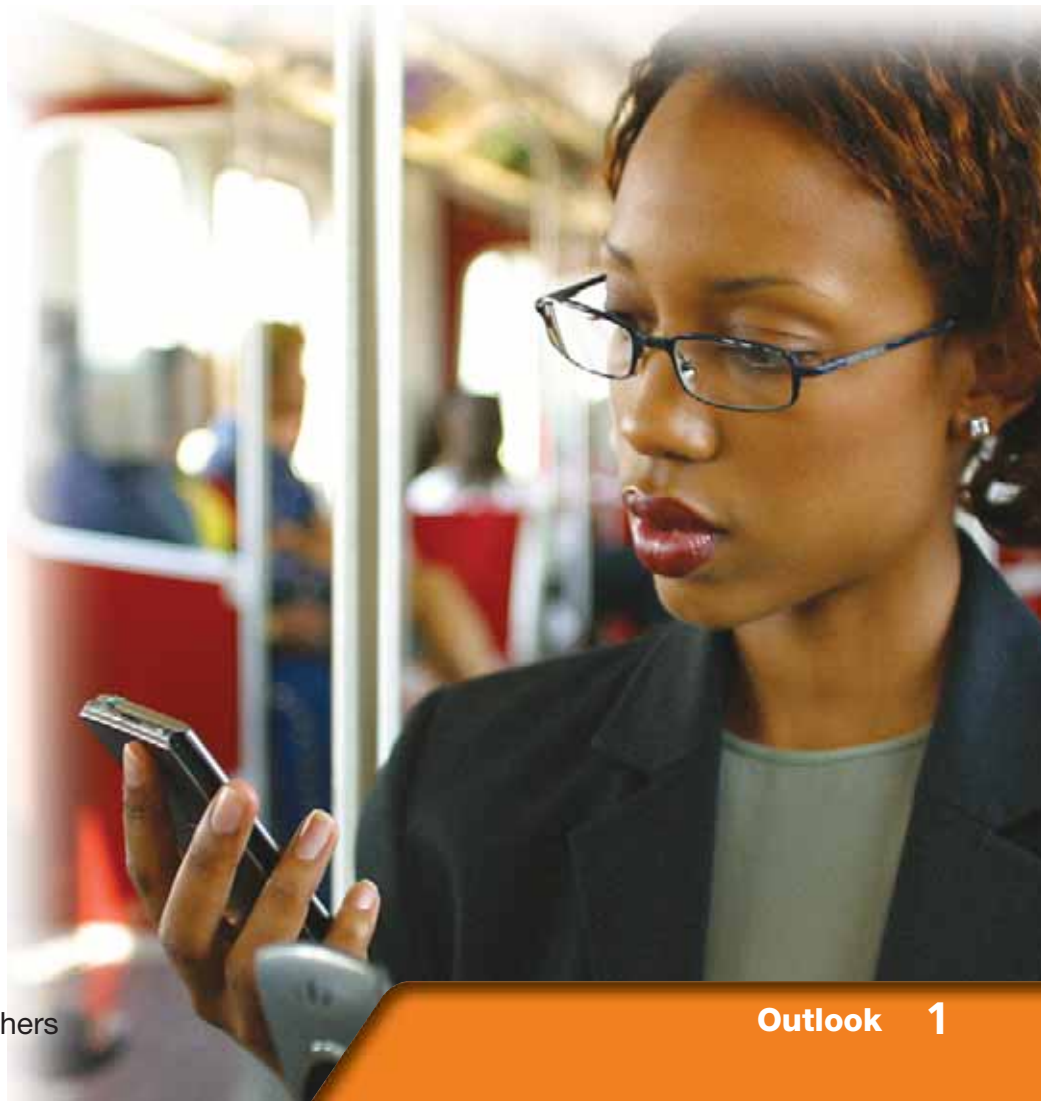
1.1, 1.2, 1.3, 1.4,  
1.5, 1.6, 1.7



Good communication is essential for success in your relationships with teachers, friends, and employers. Because the many events in life keep us moving all the time, e-mail is often the best way to communicate quickly, efficiently, and with professionalism. By writing professional e-mails and by using Outlook's features, you can keep your lines of communication flowing smoothly and build strong relationships.

## 21st CENTURY SKILLS

**Be Punctual** Do you know somebody who is always late? Do you make an effort to arrive at appointments on time? Whether arriving to work, leaving for a flight, or answering an e-mail, being *punctual*, or on time, is essential in the business world. While delays are sometimes unavoidable, being late makes you less efficient, and it also wastes your coworkers' time. *What one method can you use to make sure you are on time?*





## Before You Read

**Two-Column Notes** Two-column notes are useful for studying and organizing what you have read. Divide a piece of paper into two columns. In the left column, write down main ideas. In the right column, write supporting details.

### Read To Learn

- Understand how to create, format, and send professional e-mail messages.
- Organize, send, and print incoming and outgoing mail.
- Download, upload, and manage document attachments to e-mail messages.
- Evaluate options for sending e-mail to multiple recipients.

### Main Idea

Gain a basic understanding of Outlook's e-mail functions to establish solid communication skills through e-mail.

### Vocabulary

#### Key Terms

attachment	Navigation pane
delivery options	Reading pane
encrypt	Sensitivity
forward	signature
Importance	To-Do Bar
Inbox pane	

### Academic Vocabulary

These words appear in your reading and on your tests. Make sure you know their meanings.

adjust  
edit  
expand  
locate

### Quick Write Activity



**Describe** On a separate sheet of paper, list three ways that e-mail is similar to traditional mail. List three ways that it is different than e-mail.

### Study Skills

**Get to the Point** When taking a test, try to make every sentence and paragraph count. Before the test, think of a few questions you may be asked to answer. Practice writing the answers to sample questions clearly and in as few words as possible. Focus on key points and important details.

## Academic Standards



### English Language Arts

**NCTE 3** Use language to accomplish individual purposes.

**NCTE 4** Adjust use of language to communicate effectively with a variety of audiences.

**NCTE 5** Employ a wide range of strategies while writing to communicate effectively with different audiences.

## Step-By-Step

- 1 To launch Outlook, choose **Start>All Programs>Microsoft Office®>Microsoft Office Outlook 2007**.
- 2 **CHECK** Your screen should look like Figure 1.1.
- 3 Locate the **Navigation** pane, which is set to **Mail**.
- 4 Locate the **Inbox** pane. Locate the **Reading** pane.
- 5 Locate the **Menu bar**. Locate the **To-Do Bar**.
- 6 Locate the **Standard toolbar**. On the **Standard toolbar**, click **New Mail Message** .
- 7 **CHECK** Your screen should look like Figure 1.2.
- 8 Locate the **Ribbon**. Locate the **Quick Access Toolbar (QAT)**. Click **Close** .

Continue to the next exercise.

### You Should Know

If Outlook has been installed as an upgrade, messages may already appear in the **Inbox** and **Reading** panes.

## EXERCISE 1-1 Identify Parts of the Outlook Screen

Getting to know the parts of the screen makes working in Outlook easier. In the **Navigation pane**, you can select Mail, Calendar, Contacts, or Tasks. In the **Inbox pane**, you can preview e-mail messages quickly without opening each one. The **Reading pane** allows you to see the entire contents of a selected message. The menu bar and the Standard toolbar provide valuable tools with which to compose and edit, or change, messages in the main page of Outlook. In individual message views, the Microsoft Office Ribbon displays groups of buttons and commands for manipulating message elements. The **To-Do Bar** keeps track of tasks and appointments.

FIGURE 1.1 The Outlook main screen

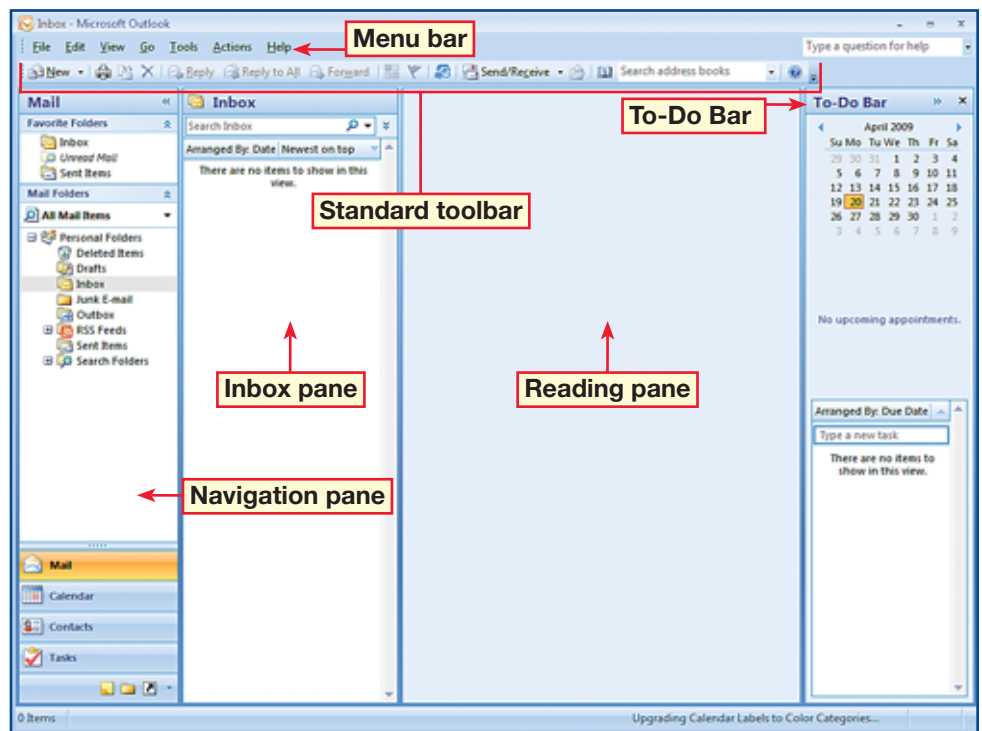
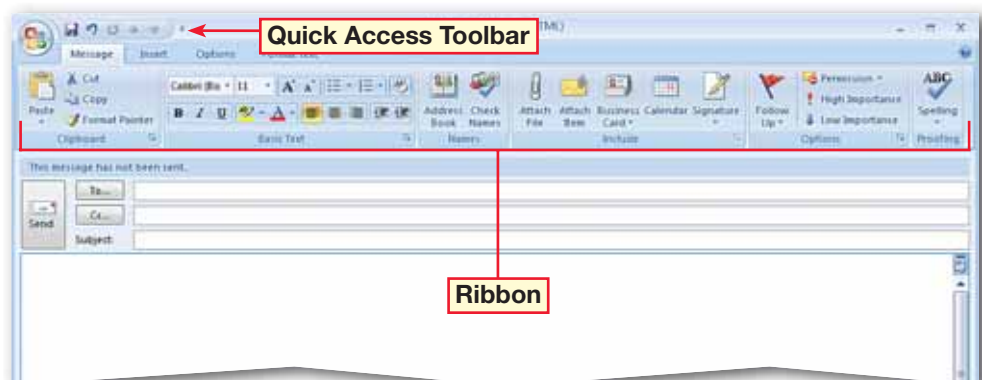



FIGURE 1.2 The Outlook Ribbon




## Step-By-Step

- 1 On the Outlook main screen, on the **Standard** toolbar, click **New Mail Message** .
- 2 **CHECK** Your screen should look like Figure 1.3.
- 3 In the **To** box, key the e-mail address assigned by your teacher.
- 4 In the **Subject** box, key: **Animal Adoption Newsletter**. In the body, key the message in Figure 1.4.
- 5 **CHECK** Your screen should look like Figure 1.4.

 Continued on the next page.

### Tech Tip

If you click **Print**  on the **Standard** toolbar, the **Print** dialog box will not open. The item will print with default settings.

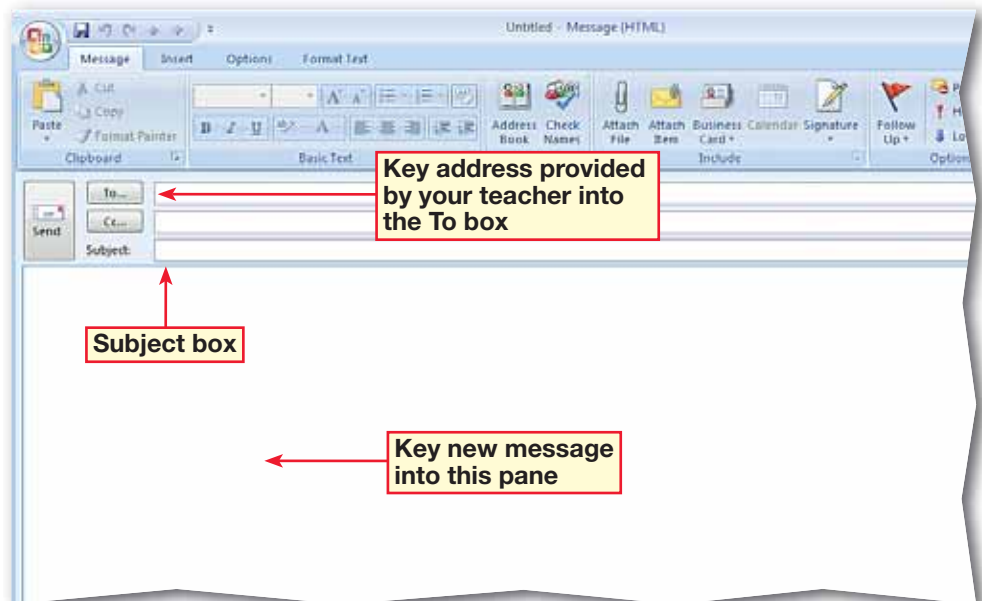
### Troubleshooter

If your e-mail does not reach its recipient, or goes to the wrong person, make sure that you have used the correct formatting. An e-mail address consists of a user name, the @, or “at” symbol, and the Internet domain name, such as *ppatel@domain.edu*.

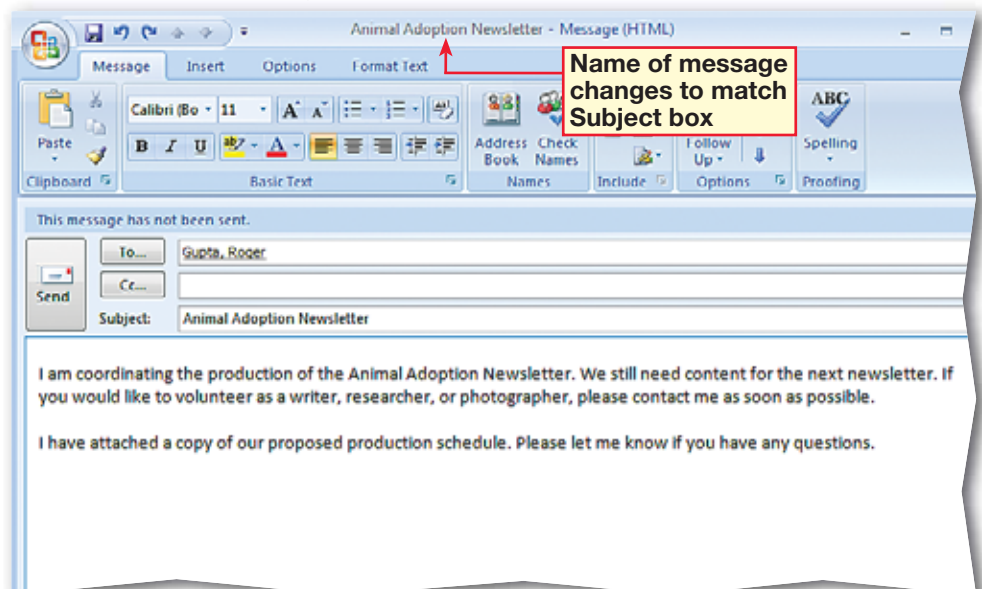
## EXERCISE 1-2 Compose and Save a New Message

There are three steps to composing a new e-mail message. First, **locate**, or find, the **To** box and key the address for the person to whom you are sending the message. Second, include a subject that tells the recipient what your message is about. Third, key your message in the e-mail’s body. Outlook allows you to save a draft of the message that you are composing to the Drafts folder. You can also save completed messages that you do not want to send immediately.

**FIGURE 1.3** Outlook new message window





**FIGURE 1.4** New message





## Step-By-Step

- 6 In the **Animal Adoption Newsletter** e-mail, click **Close** .
- 7 In the dialog box, click **Yes** to save your draft.
- 8 In the **Navigation** pane, under **Mail Folders**, click **Drafts**.
- 9 **CHECK** Your screen should look like Figure 1.5.
- 10 In the **Drafts** pane, double-click the saved draft.
- 11 Click **Office**  and choose **Save As>Save As**.
- 12 In the **Save As** dialog box in the **File name** box, key: **Animal1-[your first initial and last name]** (for example, *Animal1-ppatel.*)
- 13 In the **Save as type** box, click the drop-down arrow and select **Outlook Message Format**.
- 14 Browse to the location provided by your teacher (see Figure 1.6). Click **Save**.

 Continue to the next exercise.

### Shortcuts

You can also create a new mail message by pressing

 + .

## EXERCISE 1-2 (Continued) Compose and Save a New Message

FIGURE 1.5 E-mail saved as a draft

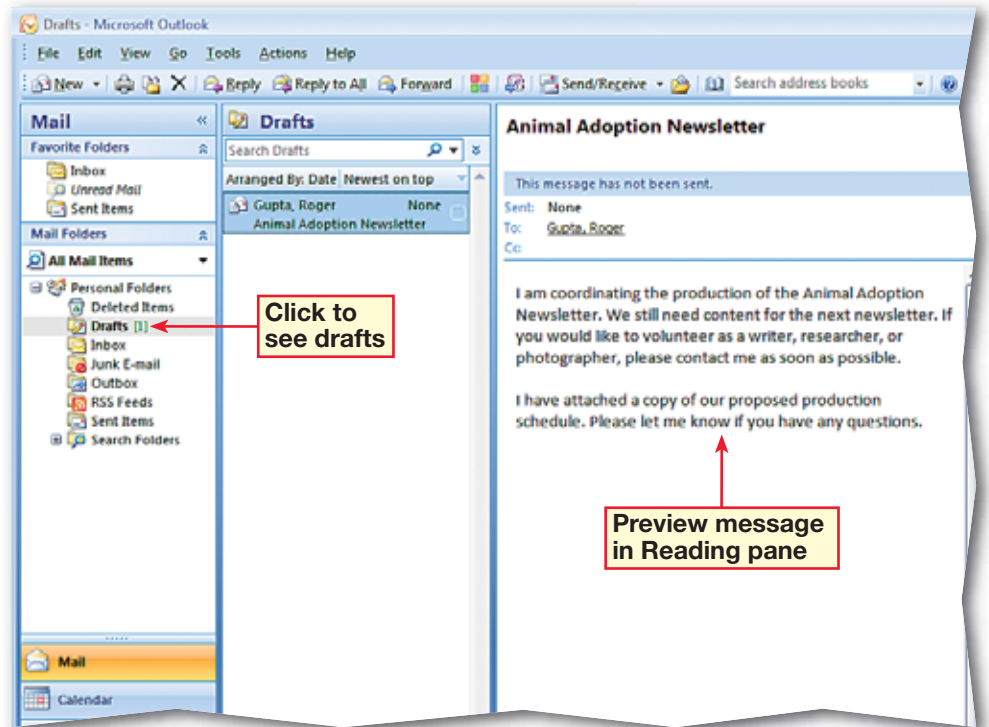
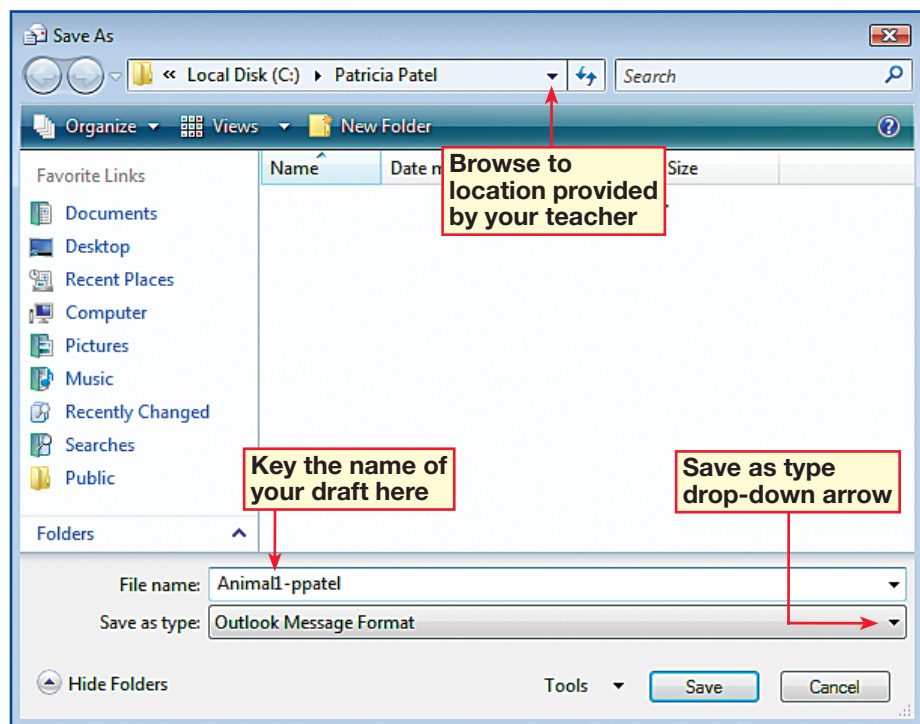


FIGURE 1.6 Save As dialog box



## Step-By-Step

- 1 On the e-mail's **Ribbon**, choose **Message>Include>Attach File**  (see Figure 1.7).
- 2 In the **Insert File** dialog box, locate the data file **Animal.docx**. Select the file. Click **Insert**.
- 3 Choose **Insert>Illustrations>Picture** .
- 4 Locate and select the data file **dog.JPG**. Click **Insert**.
- 5 Choose **Format>Adjust>Compress Pictures** .
- 6 In the **Compress Pictures** dialog box, click **Options**. Under **Target output**, select **E-mail**. Click **OK**.
- 7 Click **OK** again.
- 8 **CHECK** Your screen should look like Figure 1.8.
- 9 Select the picture. Press **DELETE**. On the **QAT**, click **Save** .

 Continue to the next exercise.

### Tech Tip

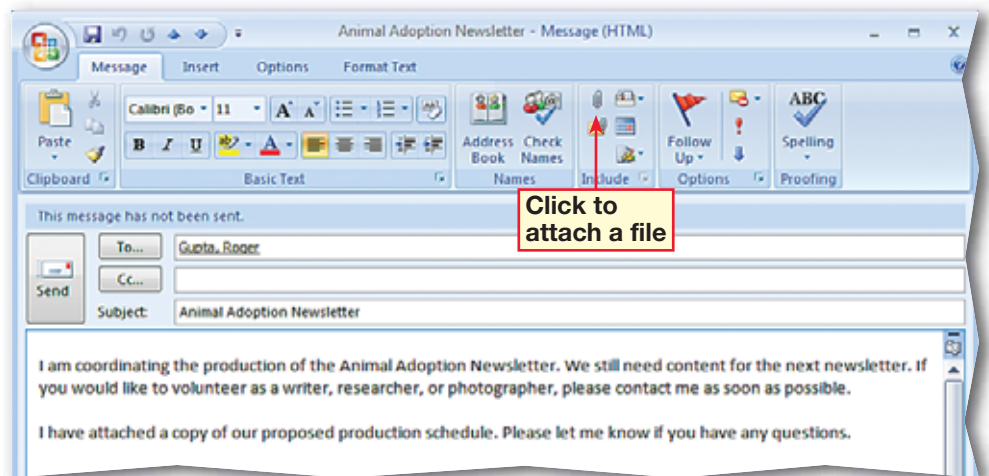
To remove an attachment, right-click the attachment and click **Remove** on the shortcut menu.

## EXERCISE 1-3 Insert an Attachment

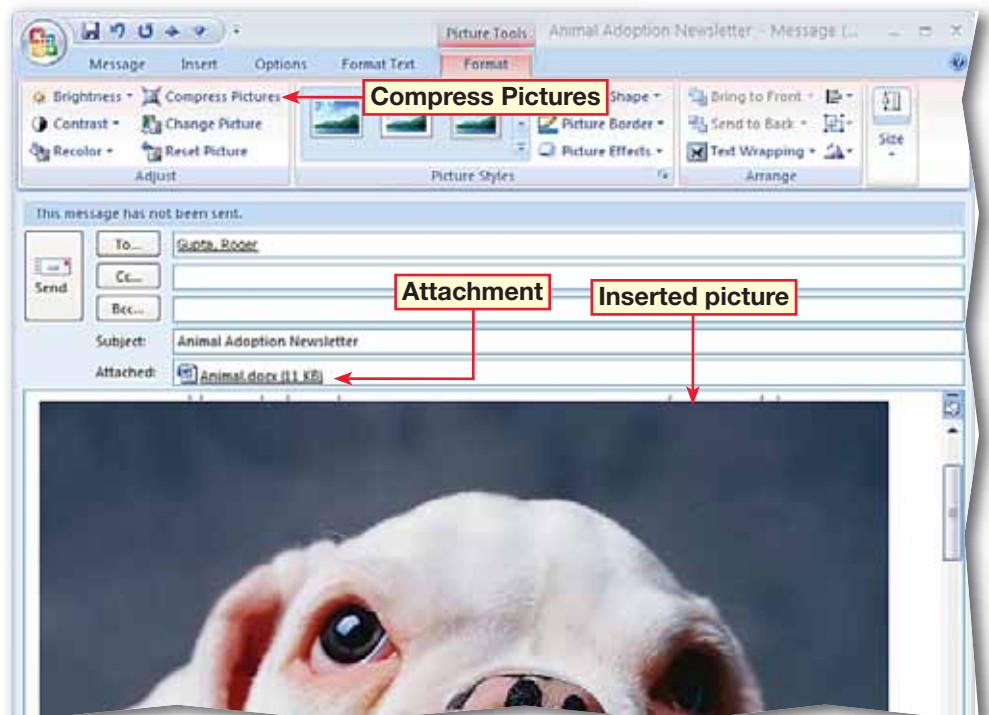


An **attachment** is a file that you send along with a message. An attachment can be a text document, a photo, a music file, or any other type of file. You can use attachments to provide additional information with your message, or to exchange files via e-mail. In this exercise, you will attach a Word document and also attach a picture by inserting it directly into the body of the e-mail. Because picture attachments are often large, you can compress the size of the file to make it quicker to send.

**FIGURE 1.7** Attach File button



**FIGURE 1.8** Message with file attached and compressed picture



## Step-By-Step

**1** In the **Animal Adoption Newsletter** e-mail, in the **Attached** box, right-click the **Animal.docx** attachment. Choose **Open**.

**2** In the **Opening Mail Attachment** dialog box, click **Open**.

**3** **CHECK** Your screen should look like Figure 1.9.

**4** Close the attachment. Close the e-mail.

**5** Select the e-mail in the **Drafts** pane. Double-click the attachment in the **Reading** pane (see Figure 1.10).

**6** In the **Opening Mail Attachment** dialog box, click **Open**.

**7** Click **Close** . Exit Word.

**8** Right-click the e-mail in the **Drafts** pane. Choose **View Attachments > Animal.docx**.

**9** In the dialog box, click **Open**. Exit Word.

 Continue to the next exercise.

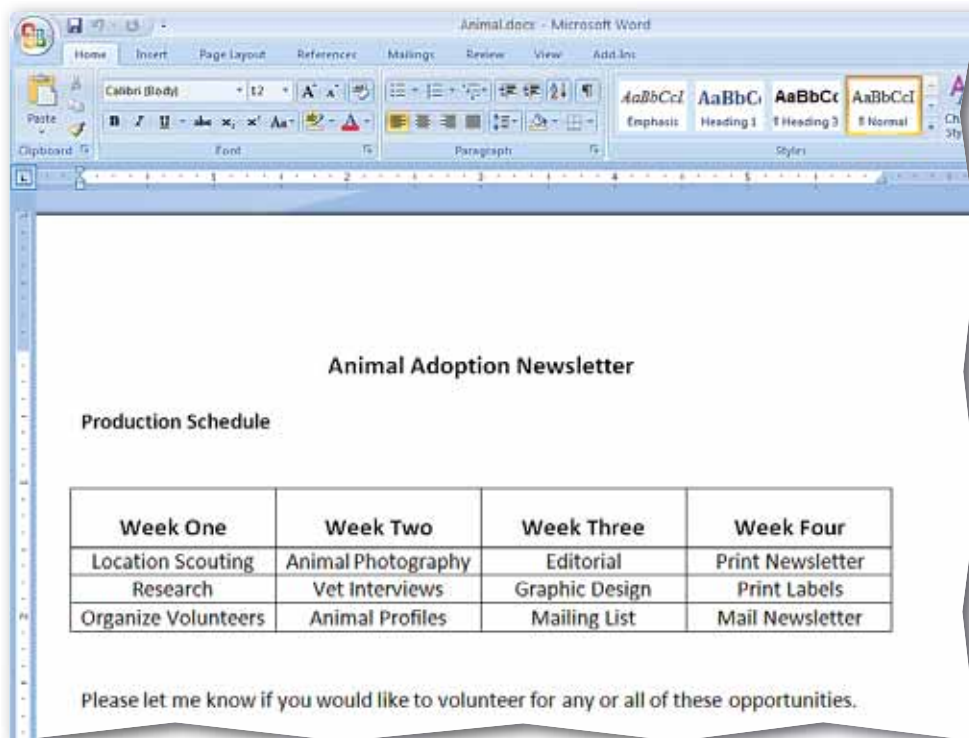
### Troubleshooter

Large attachments (such as pictures) can take a long time to download.

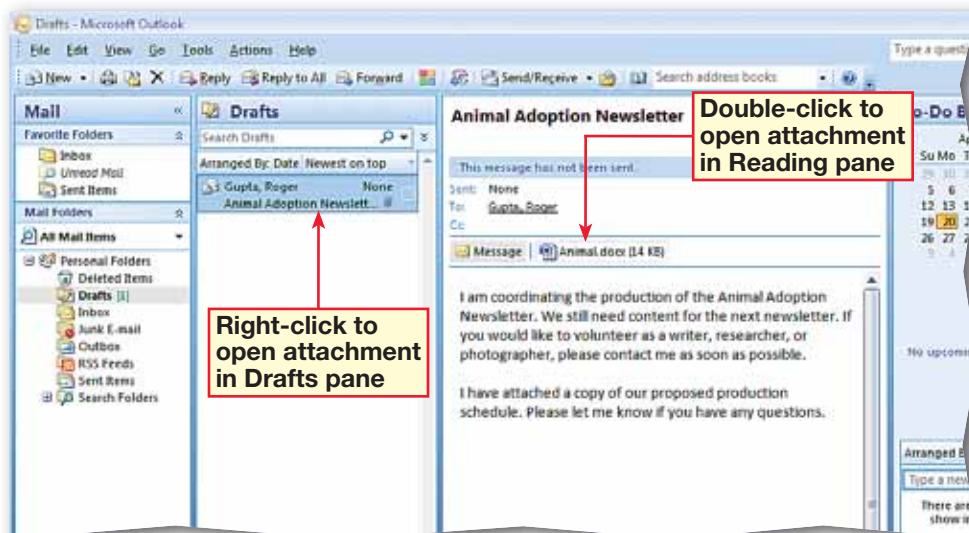
## EXERCISE 1-4 Open an Attachment

Outlook also allows you to receive attachments. Attachments can be opened in a number of ways. You can **expand**, or enlarge, an attachment in the Reading pane. You also can open an attachment from the list of e-mails in the folder list. Attachments also can be opened from within an open e-mail.

**FIGURE 1.9** Animal.docx attachment in Word full-screen view



**FIGURE 1.10** Outlook main screen



## Step-By-Step

- 1 In the **Reading** pane, click the **Animal.docx** attachment.
- 2 **CHECK** Your screen should look like Figure 1.11.
- 3 In the **Reading** pane, click **Preview file**.
- 4 **CHECK** Your screen should look like Figure 1.12.
- 5 In the **Reading** pane, click **Message**.

Continue to the next exercise.

### Academic Skills

Proofreading the documents you attach to your e-mail messages is a valuable skill. Misspellings or improper punctuation detract from the professional look of the entire e-mail message.

### You Should Know

Do not open e-mail attachments from people that you do not know or trust. Attachments can contain malicious software, such as spyware. If you receive mail from an e-mail address that you do not recognize, do not open it and tell your teacher.

## EXERCISE 1-5 Preview an Attachment

When you receive an attachment in an e-mail message, you might not want to open it. For example, you may be cautious about opening attachments to an e-mail from someone you do not know. You can preview attachments in much the same way that you preview e-mail messages in the Reading pane. Attachments also can be previewed in an open e-mail message.

FIGURE 1.11 Animal.docx attachment preview warning

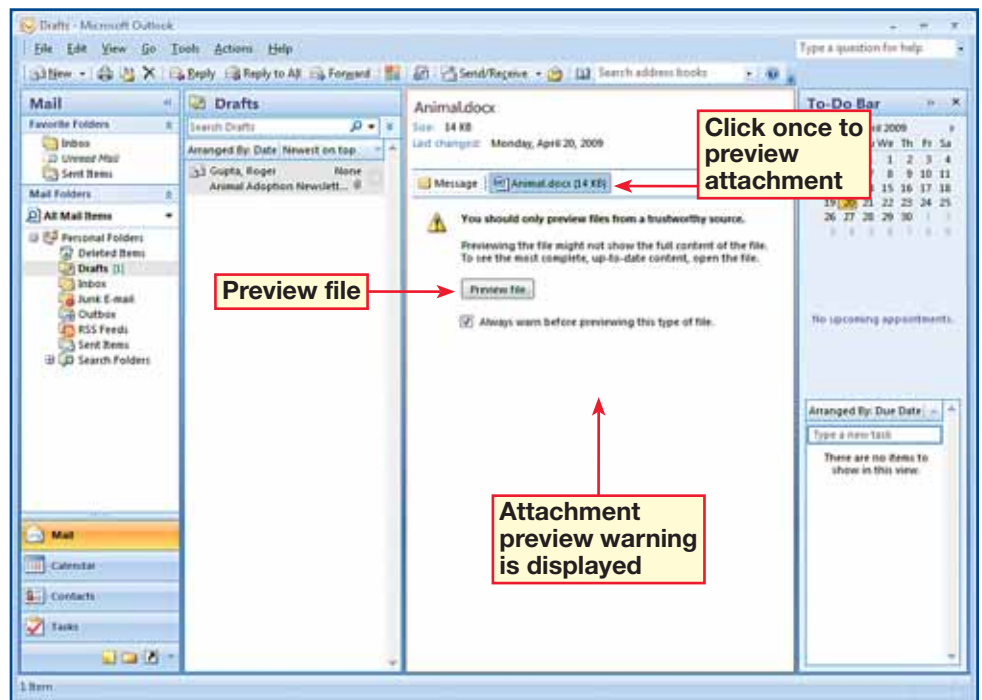
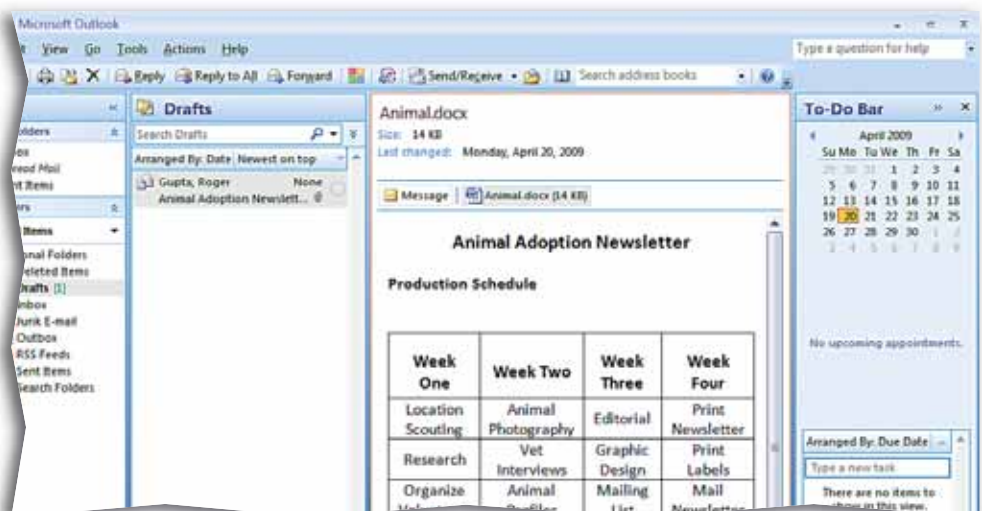


FIGURE 1.12 Attachment preview in Reading pane



## Step-By-Step

- 1 In the **Drafts** pane, double-click the **Animal Adoption Newsletter** e-mail.
- 2 In the **Attached** box, right-click the **Animal.docx** attachment and select **Save As**.
- 3 **!CHECK** Your screen should look like Figure 1.13.
- 4 Ask your teacher where to save the attachment, and navigate to that location in the **Save Attachment** dialog box.
- 5 **!CHECK** Your dialog box should look similar to Figure 1.14.
- 6 Click **Save**.

➔ Continue to the next exercise.

### You Should Know

To save more than one attachment from an open message at once, choose **Message>Actions>Other Actions>Save All Attachments**. In the **Save All Attachments** dialog box, click **OK**. Then, choose a folder location for the files.

## EXERCISE 1-6

### Save an Attachment to a Specific Location

After you have opened and viewed e-mail attachments, you can save attachments to your computer or to a location on a network. Saving an attachment to a specific location allows you to work with the attachment as a unique document in its native, or original, application. Once you have saved the attachment, you can access it from the folder where you have saved it. You will not need to reopen the e-mail.

FIGURE 1.13 Save Attachment shortcut menu

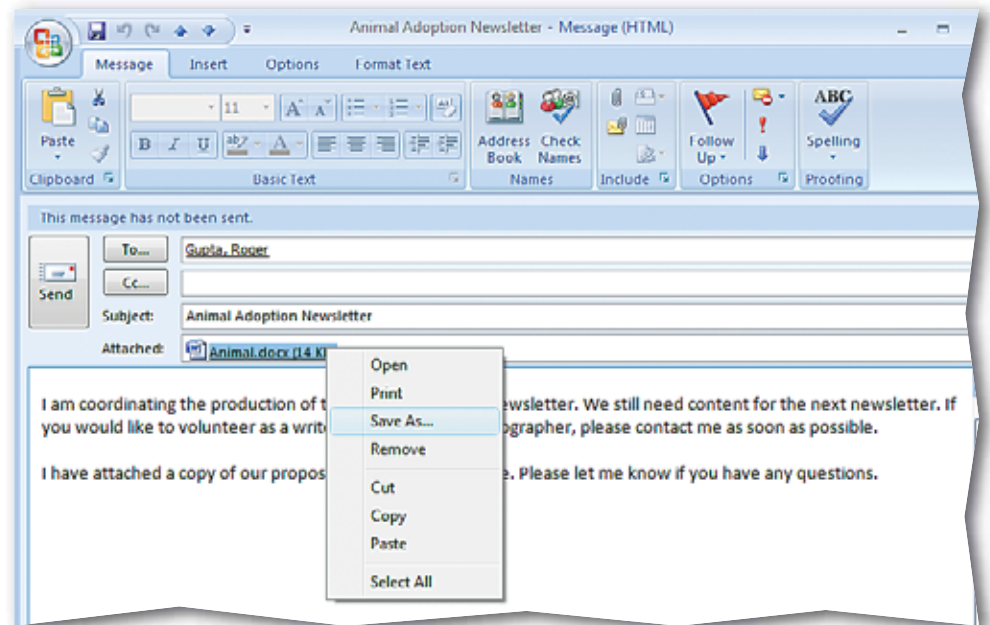
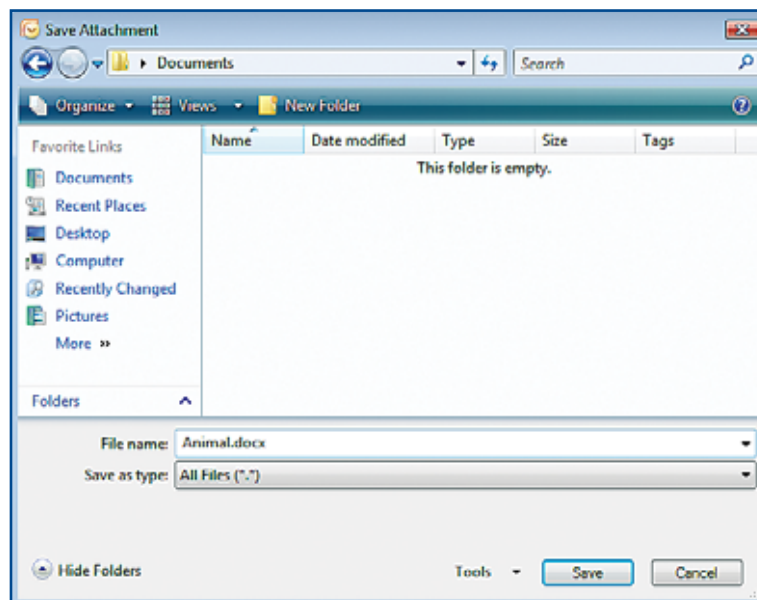


FIGURE 1.14 Save Attachment dialog box



## Step-By-Step

- 1 In the **Animal Adoption Newsletter** e-mail, choose **Message>Options>Low Importance**.
- 2 Choose **Message>Options** and click the **Message Options Dialog Box Launcher**.
- 3 In the **Message Options** dialog box, click the **Sensitivity** drop-down arrow. Select **Confidential** (see Figure 1.15).
- 4 Under **Delivery options**, make sure the **Attachment format** is set to **Default**. Click **Close**.
- 5 In the e-mail, click **High Importance**.
- 6 **CHECK** Your screen should look like Figure 1.16.
- 7 Click **Save**. Close the e-mail draft.

Continue to the next exercise.

### Tech Tip

When forwarding an e-mail message, clear any **High Importance** settings, so that the forwarding recipient does not mistake the importance as being meant for him or her.

## EXERCISE 1-7 Set Message Options

You can **adjust** Outlook's **Importance** settings to tell the person receiving the message whether the message has a high or low priority. Use the **Sensitivity** settings to indicate that a message is personal, private, or confidential. Outlook's **delivery options** allow you to set the delivery time of a message, or to have a message automatically sent to another person at a later time or date.

FIGURE 1.15 Message Options dialog box

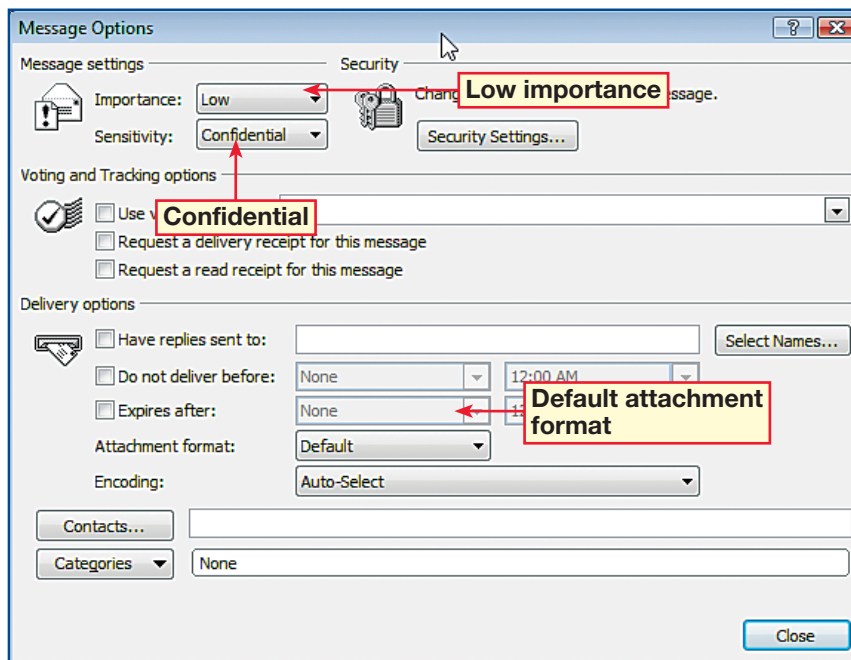
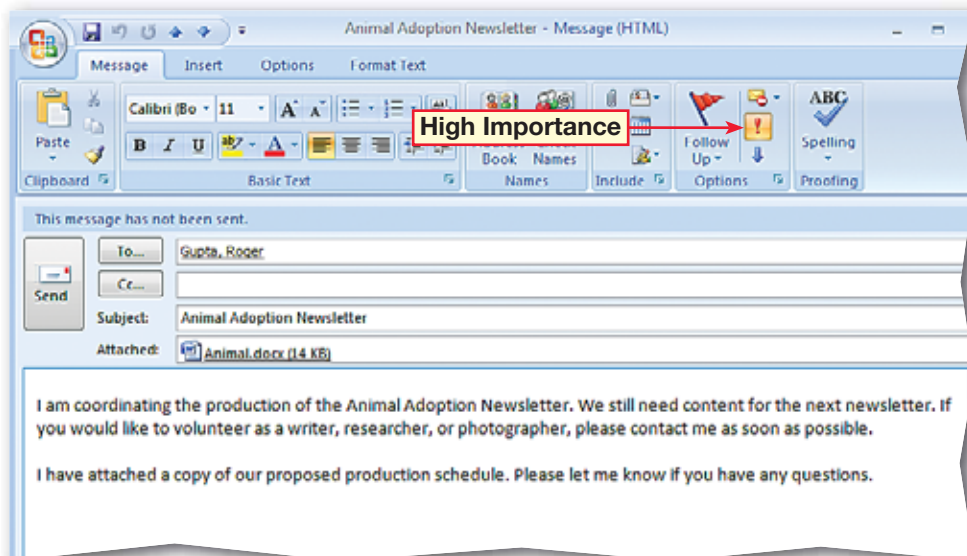







FIGURE 1.16 Message importance set to high



## Step-By-Step

- 1 In the Outlook window, on the **Menu** bar, choose **View>Reading Pane**.
- 2 Select **Bottom** .
- 3 Place the pointer over the line between the **Drafts** pane and the **Reading** pane until it turns into a double-headed arrow. Click and drag the line up to show more of the message in the **Reading** pane.
- 4 **CHECK** Your screen should look similar to Figure 1.17.
- 5 Choose **View>Reading Pane>Off** .
- 6 Choose **View>Reading Pane>Right** .
- 7 Choose **View>AutoPreview** .
- 8 **CHECK** Your screen should look like Figure 1.18.
- 9 Choose **View>AutoPreview**  to turn off automatic preview.

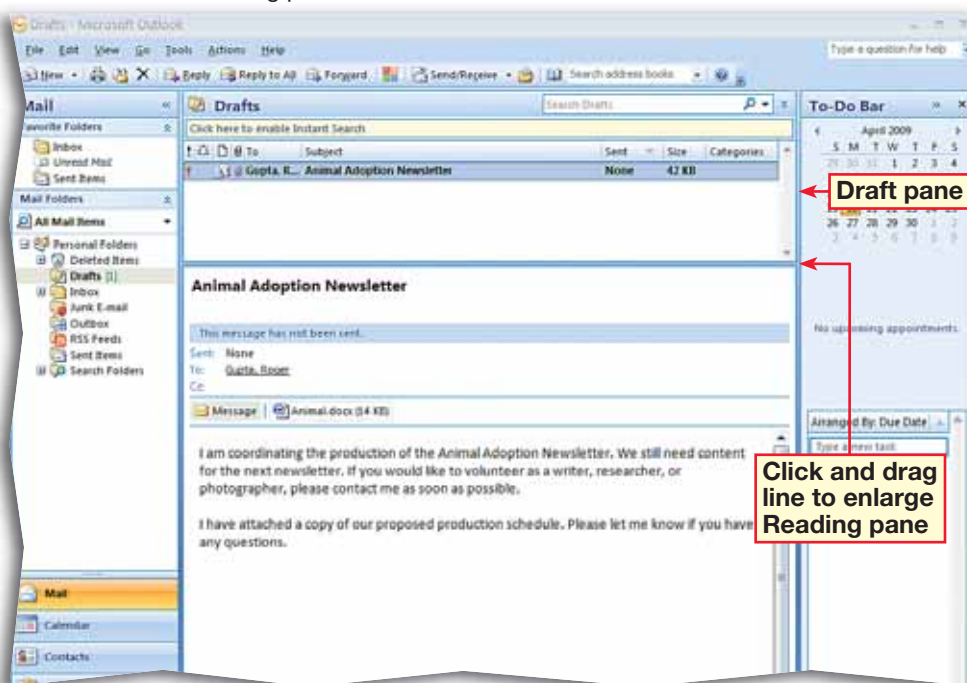
 Continue to the next exercise.

## EXERCISE 1-8

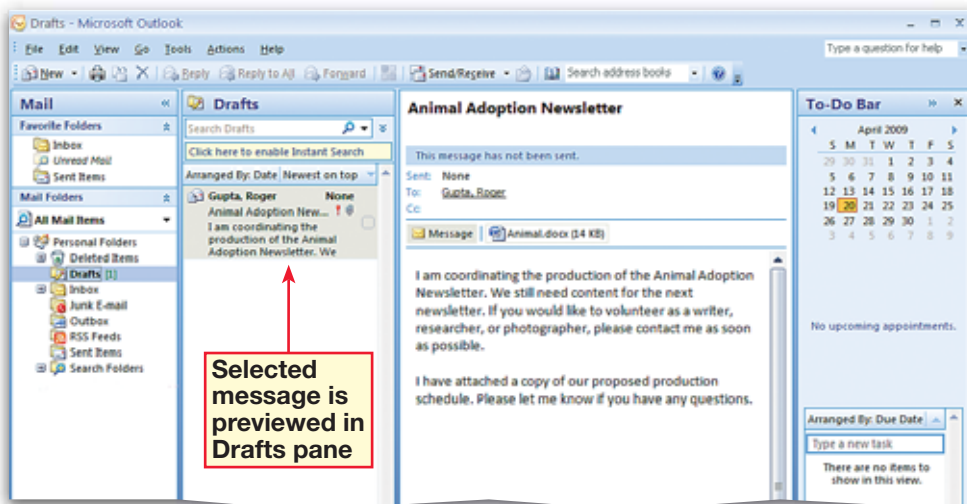
### Manipulate the Reading Pane and Automatically Preview Messages

The Reading pane allows you to read your messages without opening them. The Reading pane can be moved to display the text of messages to the right or bottom of the screen. The Reading pane can also be turned off. Outlook lets you preview an e-mail message automatically even if the Reading pane is closed. The AutoPreview feature allows you to see a whole list of e-mails and their contents in a single pane.

**FIGURE 1.17** Reading pane on bottom



**FIGURE 1.18** Outlook main screen with automatic preview



## Step-By-Step

- 1 Open the **Animal Adoption Newsletter** draft. Choose **Office Print>Print Preview**.
- 2 **CHECK** Your screen should look like Figure 1.19.
- 3 Click **Close Print Preview**.
- 4 Choose **Office Print>Print**.
- 5 Under **Printer**, ask your teacher which printer to select in the **Name** box.
- 6 Under **Copies**, in the **Number of pages** box, select **All**. Set the **Number of copies** to **1**.
- 7 With your teacher's permission, click **OK**. Click **Send**.
- 8 In the **Navigation** pane, under **Mail Folders**, click the **Sent Items** folder (see Figure 1.20).

Continue to the next exercise.

### Academic Skills

The Spelling & Grammar checker can help ensure that e-mail does not contain misspellings or punctuation errors. Print out a copy of the e-mail and proofread it to identify and fix other inaccurate information.

## EXERCISE 1-9 Preview, Print, and Send a Message

As in other Office applications, you can use Print Preview to see what an e-mail will look like before you print or send it. Print a message if you need a hard copy of it. Use the Sent Items folder to track messages you have sent.

FIGURE 1.19 Message in Print Preview

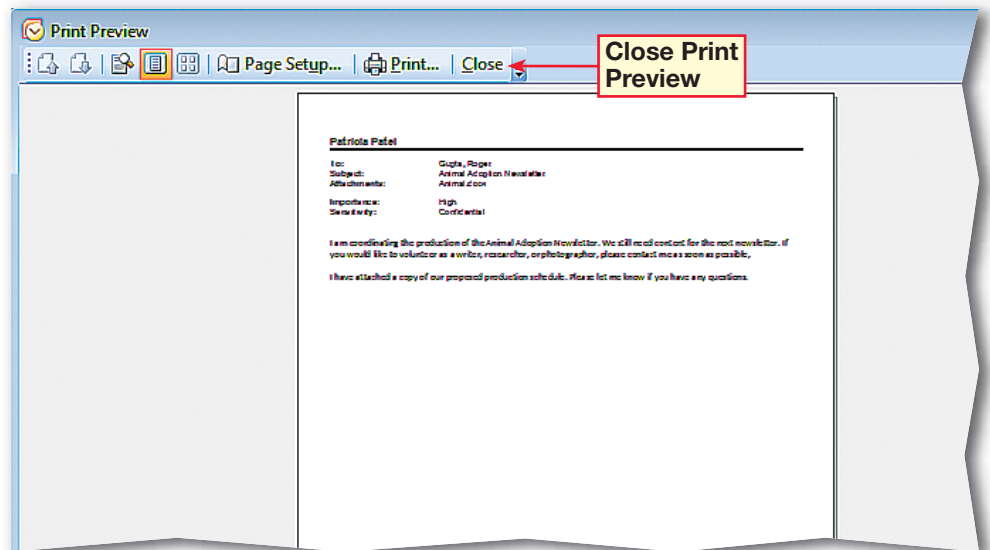
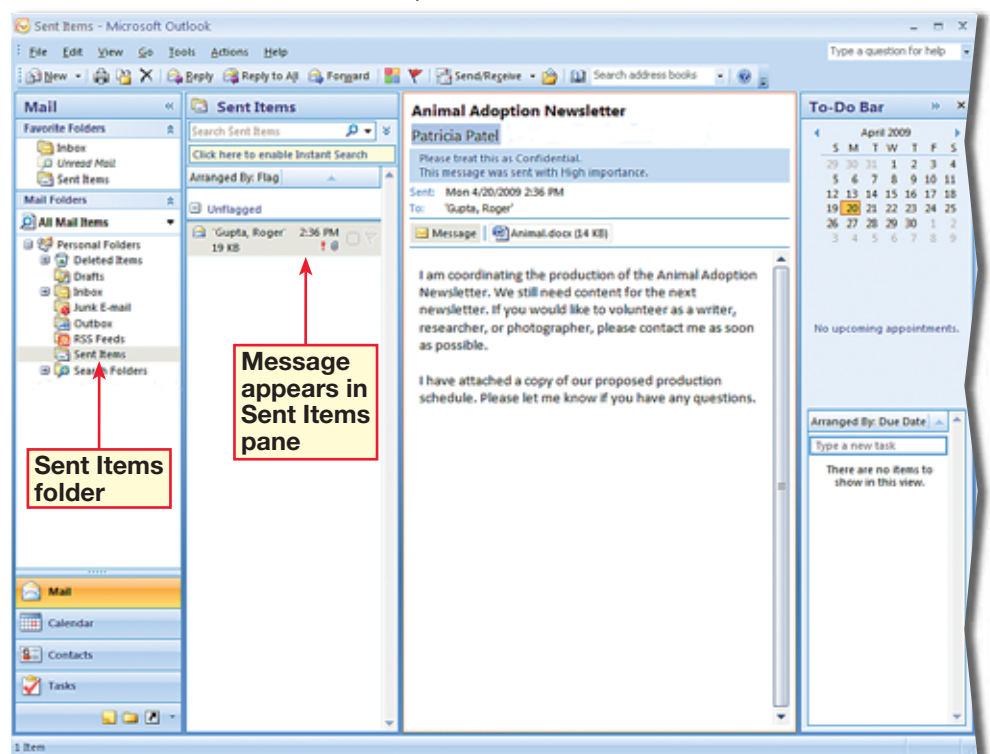





FIGURE 1.20 E-mail in Sent Items pane





## Step-By-Step

- 1 In Outlook, click **New Mail Message** .
- 2 Choose **Options>Fields>Show Bcc**  (see Figure 1.21).
- 3 In the **To** box, key the e-mail addresses of two classmates assigned by your teacher.
- 4 In the **Subject** box, key: **Production staff office supplies**.
- 5 In the body, key the message shown in Figure 1.22.
- 6 In the **Cc** box, key the e-mail address of a third classmate assigned by your teacher.
- 7 In the **Bcc** box, key the e-mail address of a fourth classmate assigned by your teacher.
- 8 **CHECK** Your screen should look like Figure 1.22.
- 9 Click **Send** .

### You Should Know

If there is more than one Bcc recipient in an e-mail message, their names will not be visible to each other.

## EXERCISE 1-10

### Send a Message to Multiple Recipients

You can send an e-mail to more than one recipient at a time by entering each person's e-mail address into the To box. You also can send an e-mail message to a single recipient and send copies to others at the same time using the Cc, or carbon copy, field. Blind carbon copies can also be sent. Other recipients who receive the e-mail will not see the e-mail addresses of the Bcc e-mail recipients.

FIGURE 1.21 Message window with Bcc

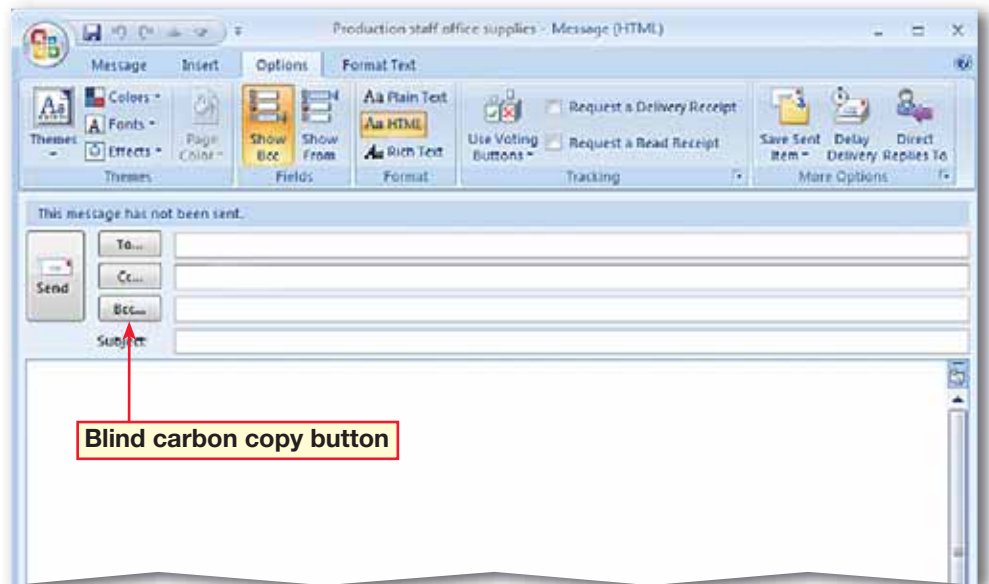
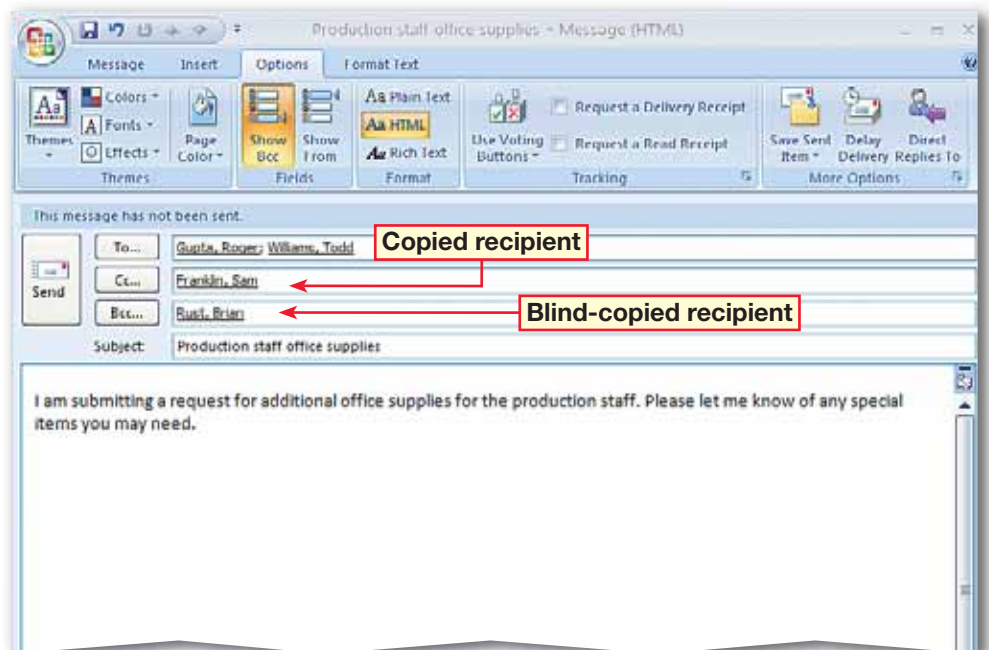


FIGURE 1.22 Message with multiple recipients



## Step-By-Step

- 1 Under **Mail Folders**, click the **Sent Items** folder.
- 2 Open the **Animal Adoption Newsletter** e-mail.
- 3 **iCHECK** Your screen should look like Figure 1.23.
- 4 Choose **Message>Actions>Other Actions**. Click **Resend this message**.
- 5 **iCHECK** Your screen should look like Figure 1.24.
- 6 In the **To** box, delete the e-mail address of the prior recipient. Key an address provided by your teacher. Click **Send**.
- 7 Close the previously sent message.

Continue to the next exercise.

### Tech Tip

When you use the **Resend This Message** command to send the same message to a different recipient, you send an exact copy of the message. If you forward an e-mail, you are forwarding, or passing, along a message that was already sent to you or other people. If you forward an e-mail, the prefix **FW:** is added to the **Subject** box.

## EXERCISE 1-11 Resend a Message

Sometimes you might need to resend a message. Perhaps the recipient accidentally deleted it, or you need to send another copy to a different recipient. You can resend a message by opening it in the Sent Items folder, changing the recipients, if necessary, and resending it.

FIGURE 1.23 Previously sent Animal Adoption Newsletter e-mail

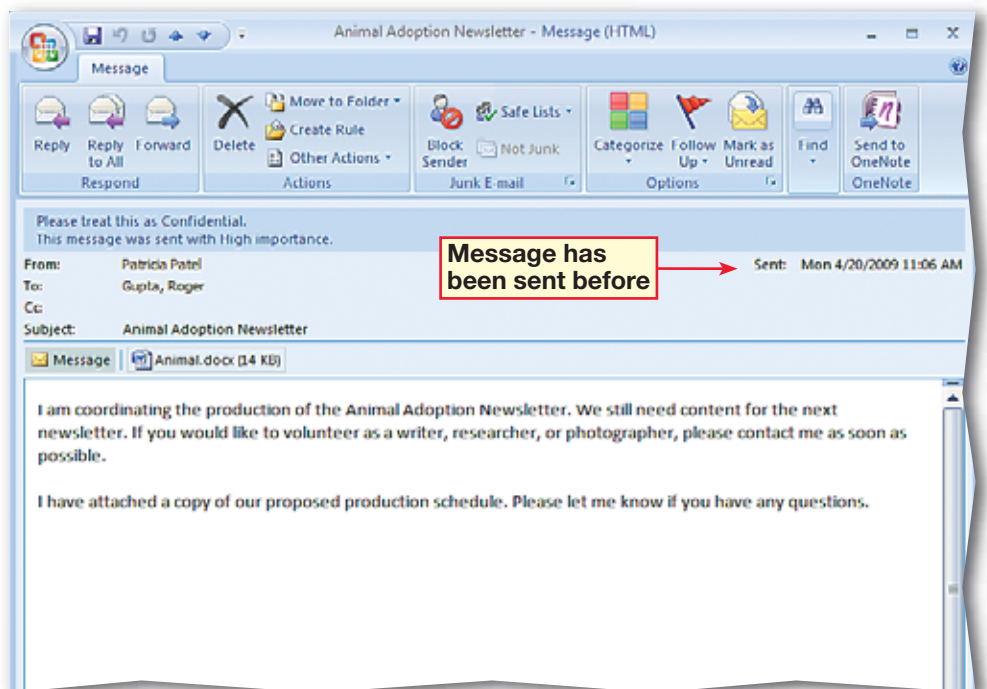
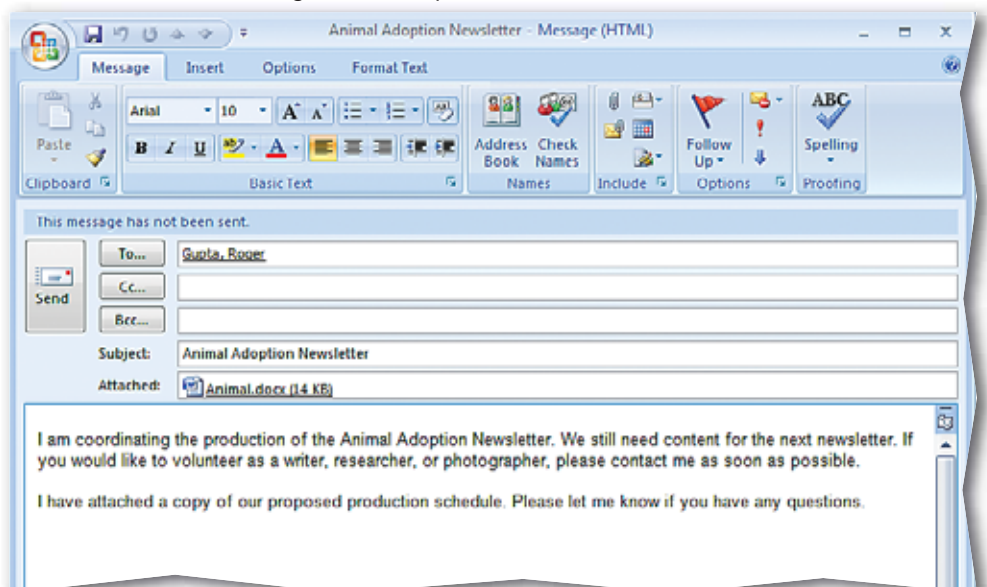


FIGURE 1.24 Resending Animal Adoption Newsletter e-mail



## Step-By-Step

- 1 Under **Mail Folders**, click the **Inbox** folder.
- 2 Choose **Tools>Options**. In the **Options** dialog box, click the **Mail Format** tab. Under **Signatures**, click **Signatures**.
- 3 In the **Signatures and Stationery** dialog box, click the **E-mail Signature** tab. Click **New**.
- 4 In the **Enter a name for your new signature** box, key: **Newsletter**. Click **OK**.
- 5 Click in the blank **Edit signature** box. Key the text shown in Figure 1.25.
- 6 **CHECK** Your screen should look similar to Figure 1.25.
- 7 Highlight the text **Patricia Patel**. Click the **Font** box drop-down menu and select **Lucida Handwriting**.
- 8 Click **OK** twice.
- 9 Click **New Mail Message**.
- 10 **CHECK** Your screen should look like Figure 1.26.

➔ *Continued on the next page.*

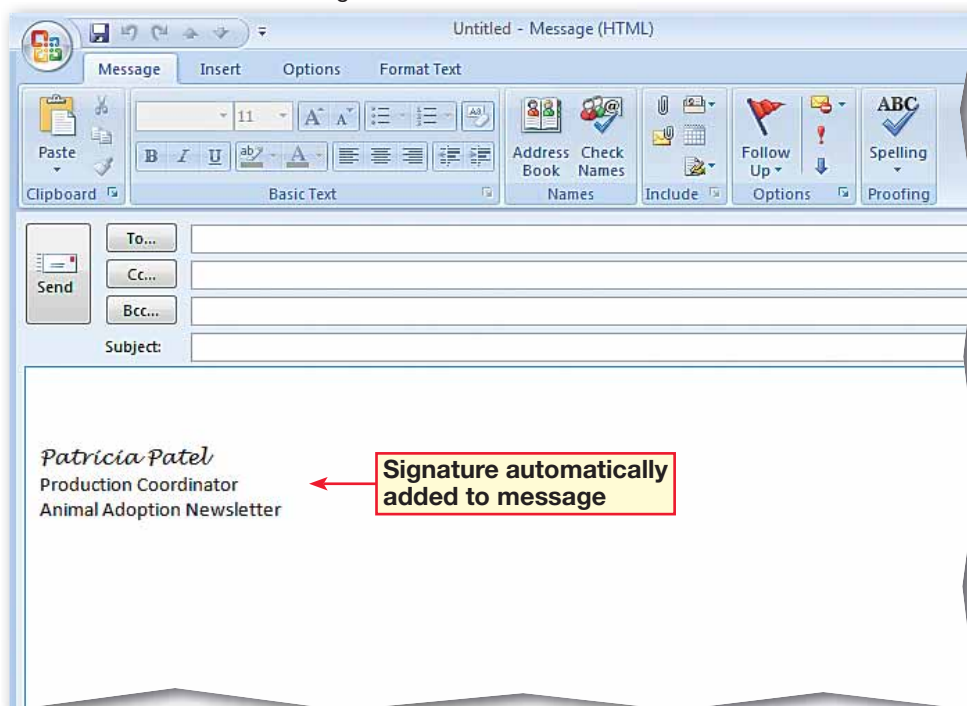
## EXERCISE 1-12 Create and Modify a Signature

To give your e-mails a more personalized touch, you can sign your e-mails with a customized **signature**. A business signature usually contains information such as the sender's name, company, position, address, and phone number. Outlook will automatically include that signature in all new e-mails.



FIGURE 1.25 Signatures and Stationery dialog box



FIGURE 1.26 New e-mail signature



## Step-By-Step

- 11 Choose **Insert>Include>Signature** . Click **Signatures**.
- 12 Click in the **Edit signature** box before **Production Coordinator**.
- 13 Key: **Assistant** (see Figure 1.27).
- 14 Click **OK**.
- 15 Close the message without saving it. Click **New Mail Message** .
- 16 **CHECK** Your screen should look like Figure 1.28.

 Continue to the next exercise.

### Academic Skills

**RE:** is an abbreviation that means regarding. When replying to a message, the prefix **RE:** is automatically added to the **Subject** box. What other abbreviations do you see in Outlook?

## EXERCISE 1-12 (Continued) Create and Modify a Signature

FIGURE 1.27 Editing signature

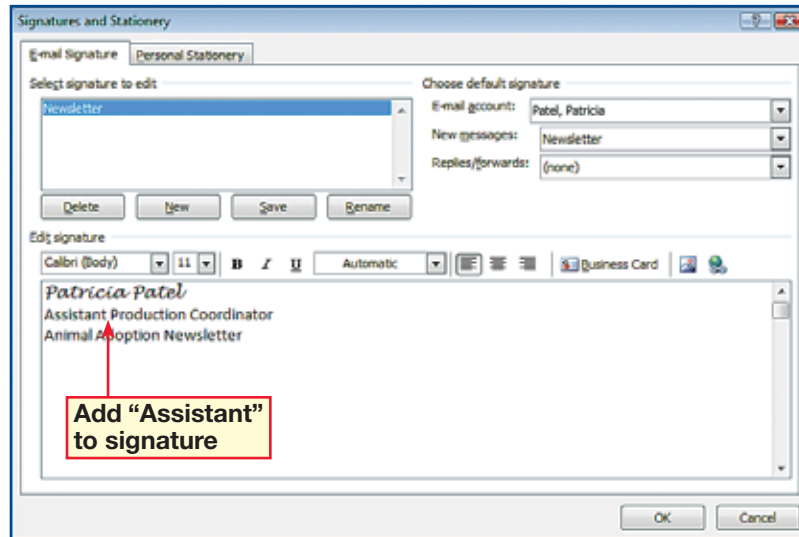
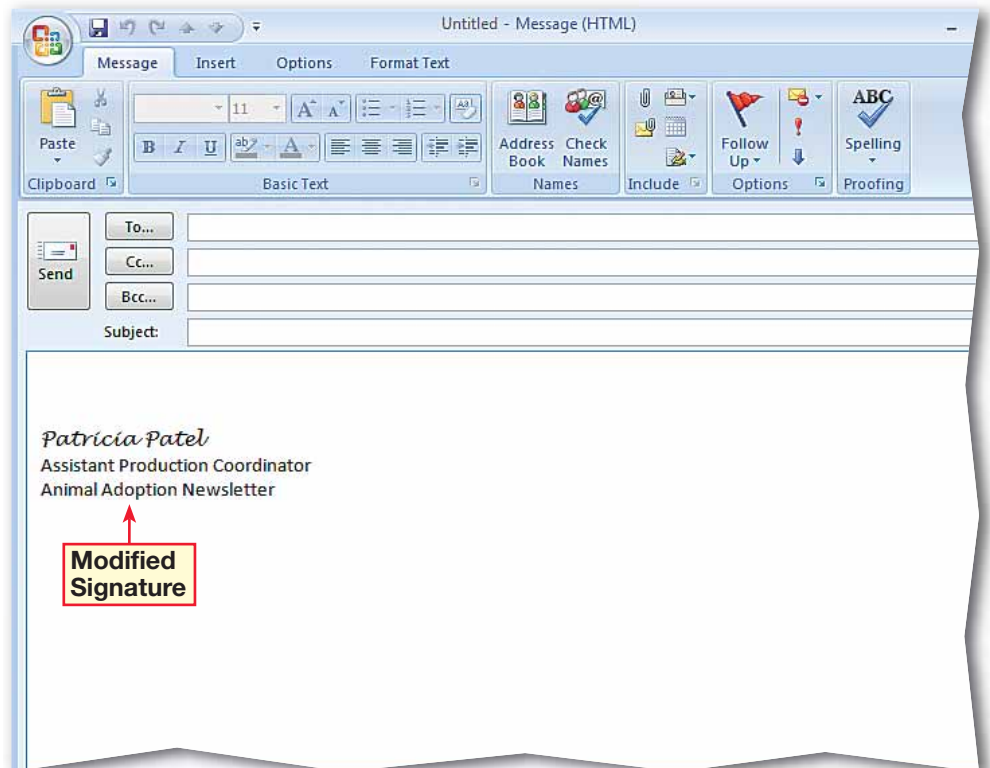


FIGURE 1.28 New e-mail signature edited



## Step-By-Step

- 1 In the **Untitled** message, choose **Insert>Include>Signature** . Click **Signatures**.
- 2 In the **Signatures and Stationery** dialog box, click **New**.
- 3 In the **New Signature** dialog box, key: **Personal**.
- 4 **CHECK** Your dialog box should look like Figure 1.29. Click **OK**.
- 5 Click in the **Edit signature** text box and key: **Patricia**.
- 6 Highlight **Patricia**. Change the font to **Lucida Handwriting**, size **10**.
- 7 Click the **Font Color** drop-down menu and select **Red**.
- 8 In the **Choose default signature** area in the **New messages** box, select **Personal** from the drop-down list.
- 9 **CHECK** Your screen should look like Figure 1.30.

 *Continued on the next page.*

### You Should Know

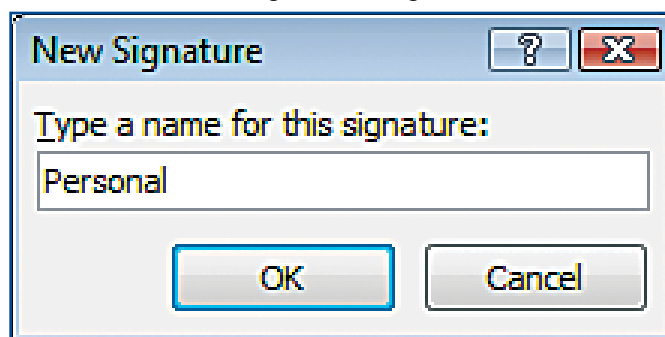
To remove an automatic signature from an e-mail, select the signature in the body of the message and press **Delete**.

## EXERCISE 1-13 Create Multiple Signatures

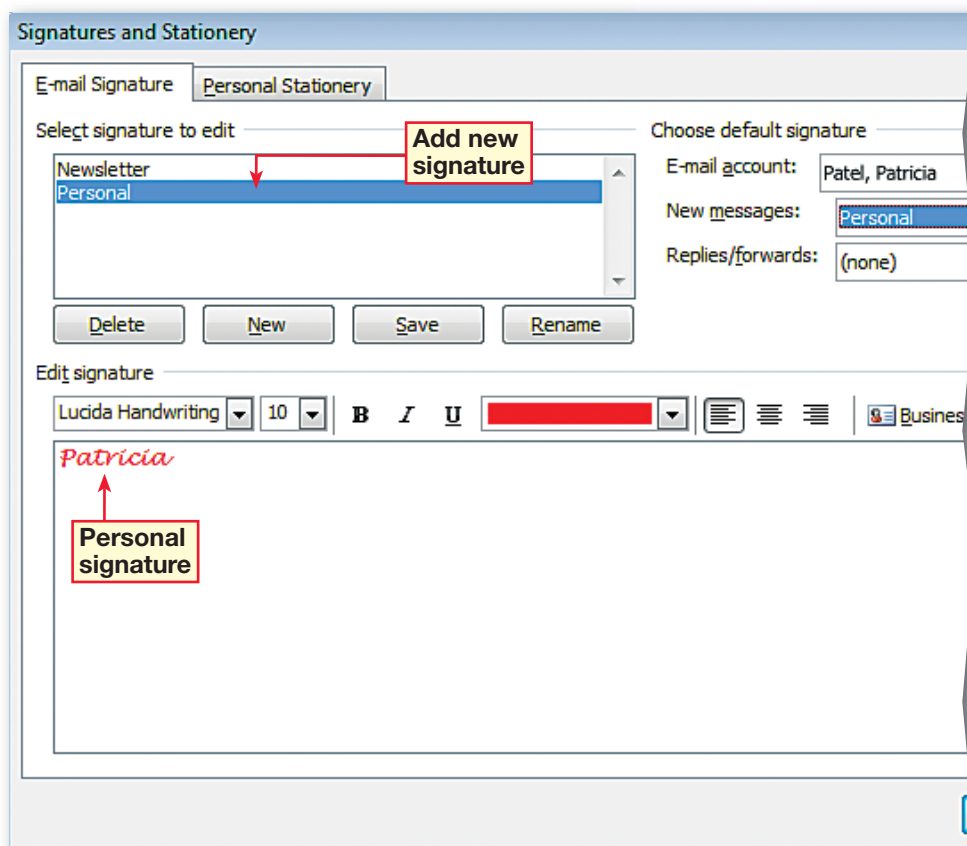


You may find that you need different signatures for different purposes. For example, you may want to use one signature for professional e-mails and a second signature for personal e-mails. Outlook allows users to create different signatures and to choose which signature to use for which e-mails.




**FIGURE 1.29** New Signature dialog box



**FIGURE 1.30** Personal signature formatted



## Step-By-Step

- 10 Click **OK**. Close the message without saving it.
- 11 Select **New Mail Message** .
- 12 **CHECK** Your screen should look like Figure 1.31.
- 13 Choose **Insert>Include>Signature** . Click **Newsletter**.
- 14 **CHECK** Your screen should look like Figure 1.32.
- 15 Choose **Insert>Include>Signature** . Click **Signatures**.
- 16 In the **Choose default signature** area in the **New messages** box, select **Newsletter**. Click **OK**.
- 17 Close the message without saving it.

### You Should Know

In businesses, many people create a signature to give their e-mail messages a professional look.

## EXERCISE 1-13 (Continued) Create Multiple Signatures

FIGURE 1.31 Personal signature in new e-mail message

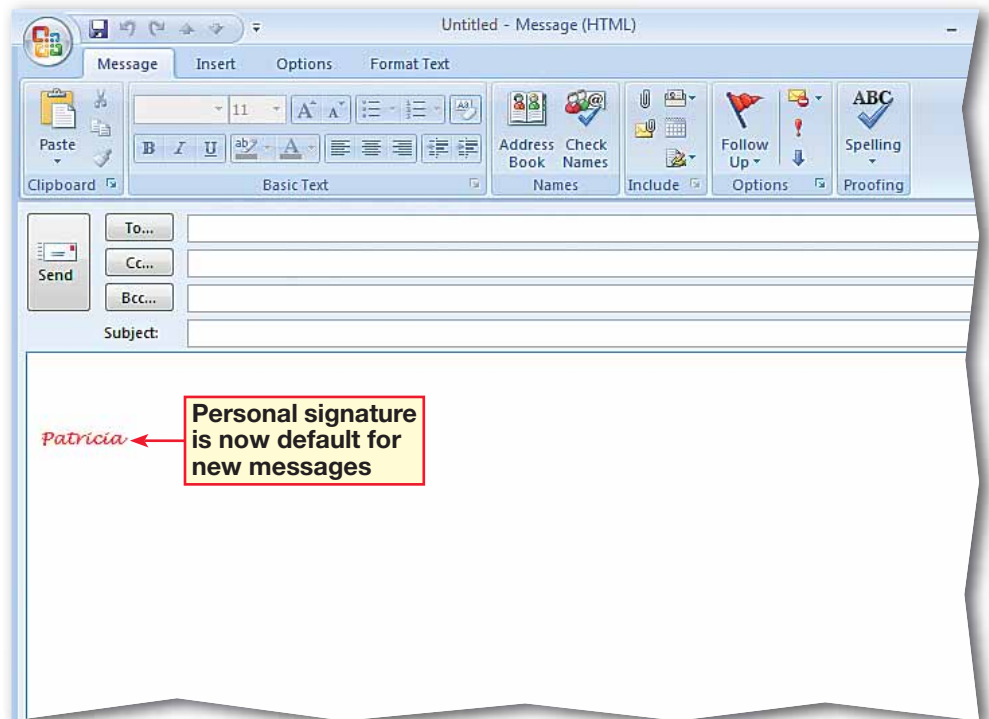
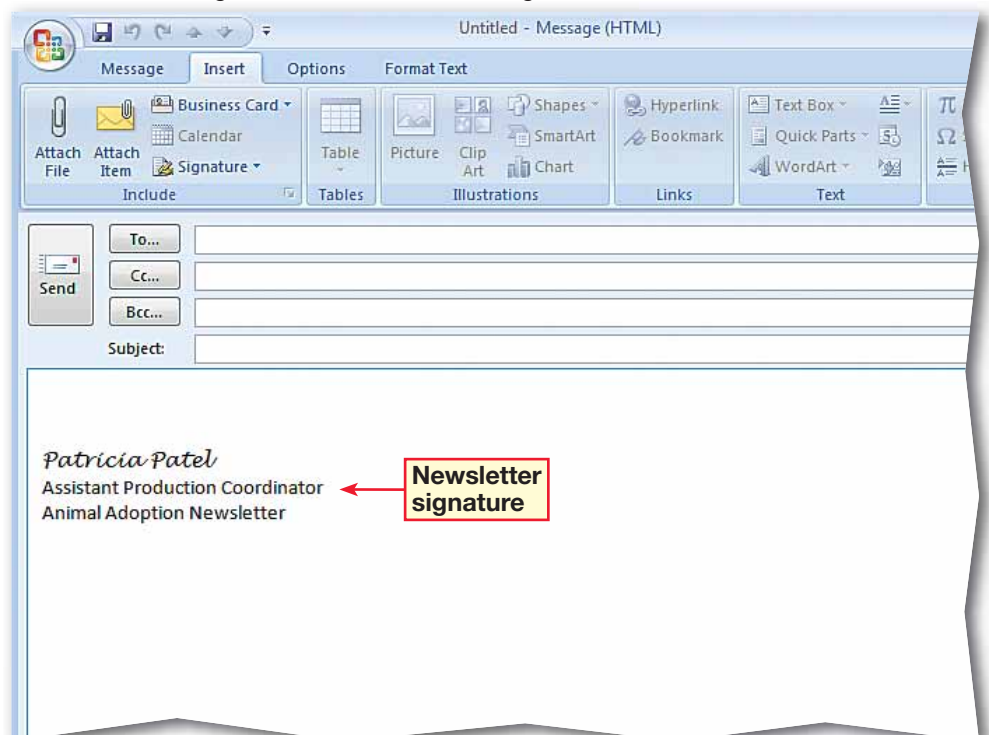






FIGURE 1.32 Signature in new e-mail message switched




## Step-By-Step

- 1 In the **Inbox**, double-click the new message **Animal Adoption Newsletter**. Choose **Message>Respond>Reply** .
- 2 Key: *I would like to take photographs of the animals for the newsletter. Would you like black-and-white or color photographs?*
- 3 **CHECK** Your screen should look like Figure 1.33.
- 4 Save your file as: **Animal2-[your first initial and last name]**. Click **Send** . Close the open message.
- 5 **CHECK** Your screen should look like Figure 1.34.
- 6 In the **Inbox**, open the **Animal Adoption Newsletter** e-mail message. Choose **Message>Respond>Reply to All** .
- 7 In the message body, key: **FYI**. Click **Send** . Close the open message.

 Continue to the next exercise.

### Tech Tip

You do not have to wait for the next scheduled time to check for mail. Click **Send/Receive**  to check for new mail.

## EXERCISE 1-14 Reply to a Message



Outlook regularly checks for new e-mail messages. When a new e-mail message arrives, it is displayed in the Inbox pane. When you reply to a message, your response automatically appears above the original message. The person who receives the reply will see their original e-mail as well as the response. The Reply to All button sends a reply to the sender as well as everyone to whom the original e-mail was sent.

FIGURE 1.33 Reply message window

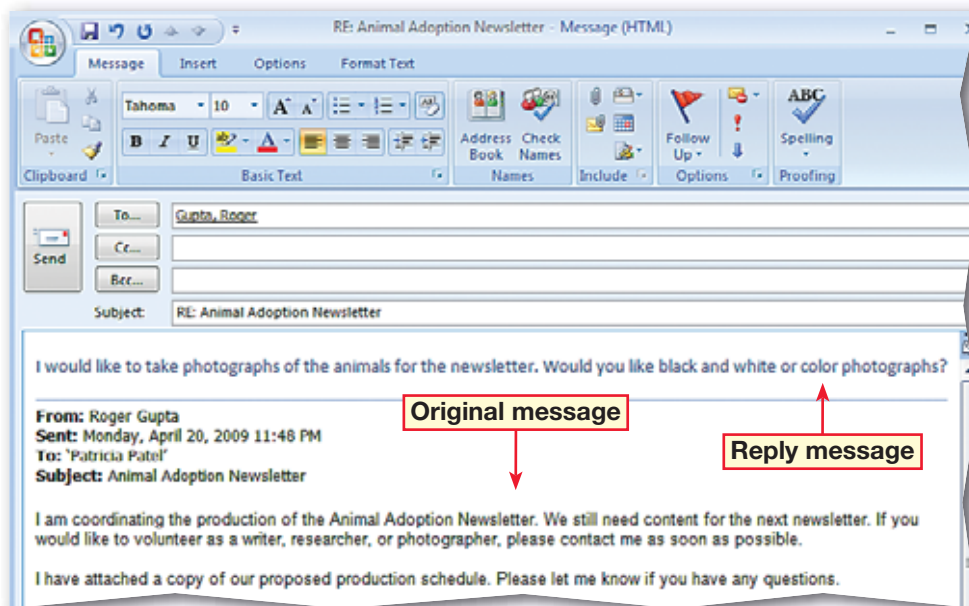
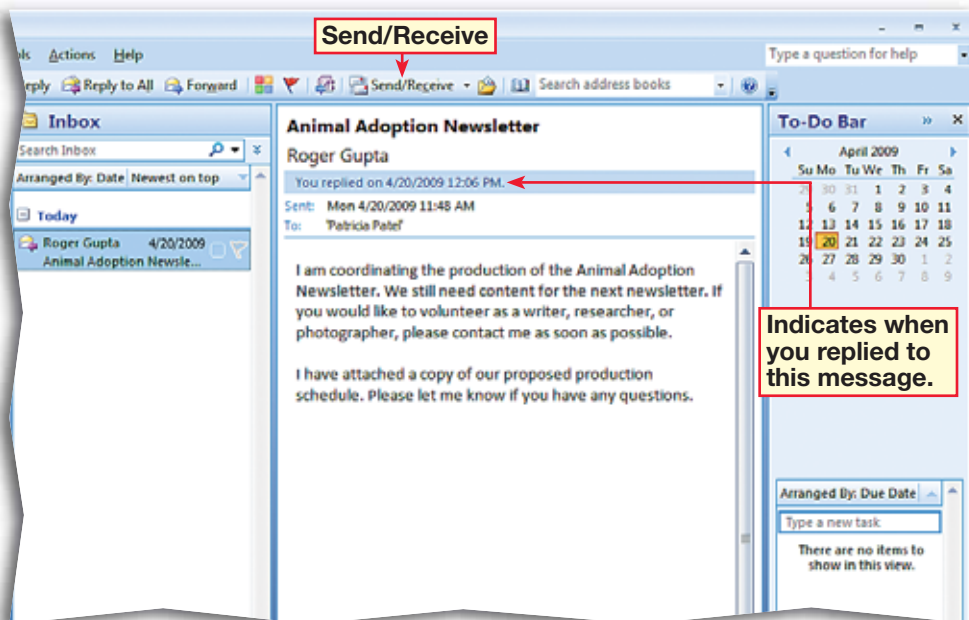





FIGURE 1.34 Outlook main mail screen



## Step-By-Step

- 1 In the **Inbox** pane, open the message **RE: Animal Adoption Newsletter**.
- 2 Choose **Message>Respond>Forward** .
- 3 **CHECK** Your screen should look like Figure 1.35.
- 4 In the **To** box, key the e-mail address of another classmate assigned by your teacher.
- 5 Click in the message body. Key the text shown in Figure 1.36.
- 6 Choose **Insert>Include>Attach File** . Attach the data file **Animal.docx** to the message.
- 7 Save your file as: **Animal3-[your first initial and last name]**.
- 8 Click **Send** .
- 9 Close the open message.

 Continue to the next exercise.

### You Should Know

If you forward a message that has an attachment, both the message and the attachment are forwarded. If you reply to a message with an attachment, the attachment is not included with the reply.

## EXERCISE 1-15 Forward a Message

Sometimes you might receive a message that you want to share with a friend or coworker. Use the **Forward** button to forward, or pass along, an e-mail message to other people.

FIGURE 1.35 Message to be forwarded

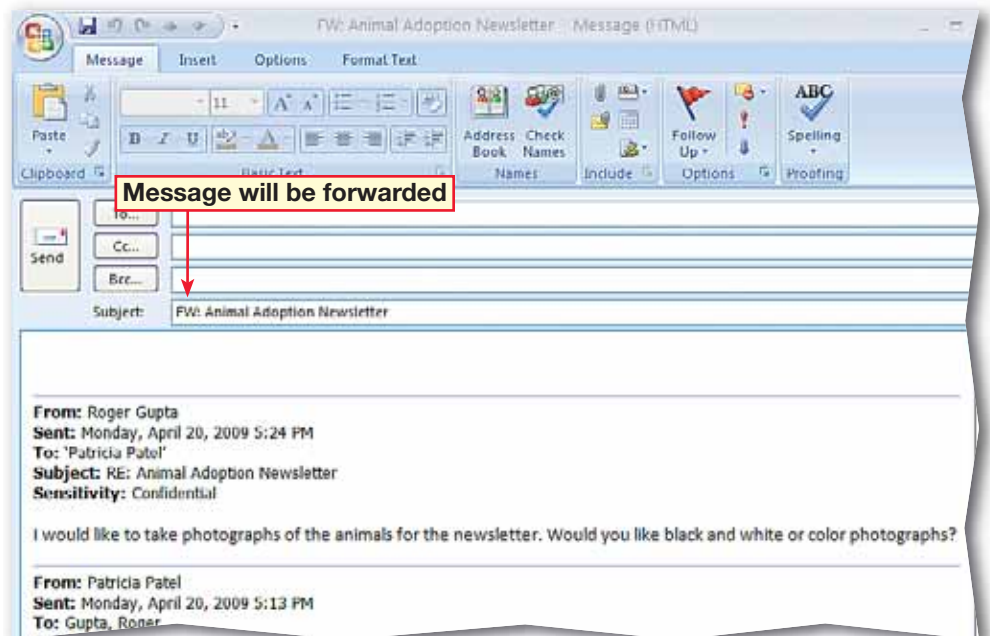
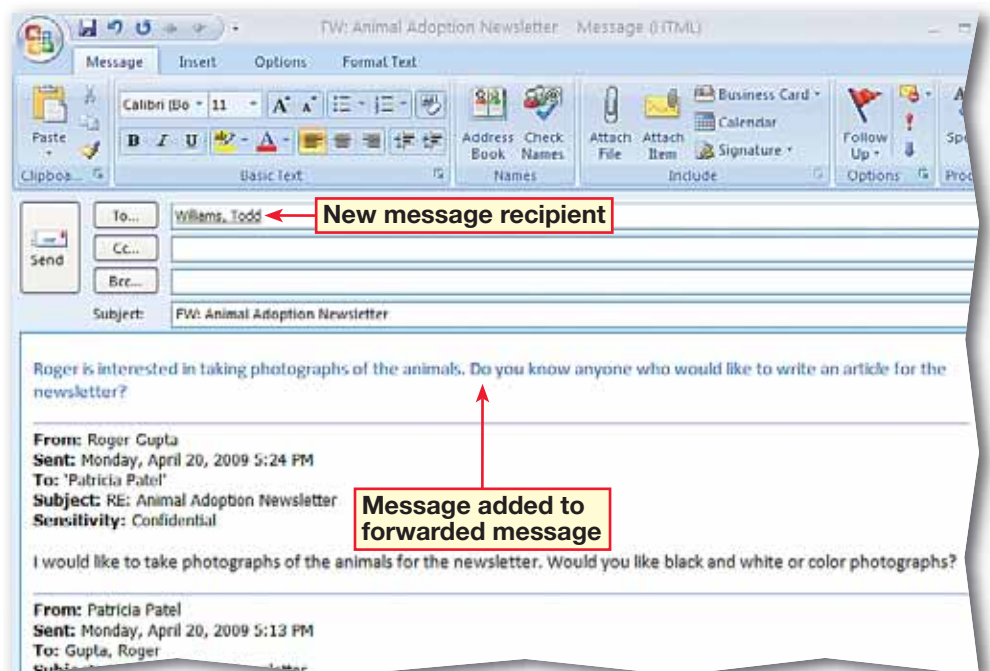



FIGURE 1.36 Message added to forwarded message





## Step-By-Step

- 1 In the **Inbox** pane, open the message **RE: Animal Adoption Newsletter**.
- 2 Choose **Message>Options>Follow Up** . Click **Tomorrow**.
- 3 **CHECK** Your screen should look like Figure 1.37.
- 4 Close the message.
- 5 **CHECK** Your screen should look like Figure 1.38.
- 6 In the **Inbox** pane, right-click the red flag icon in the **RE: Animal Adoption Newsletter** e-mail. Select **Clear Flag**.

 Continue to the next exercise.

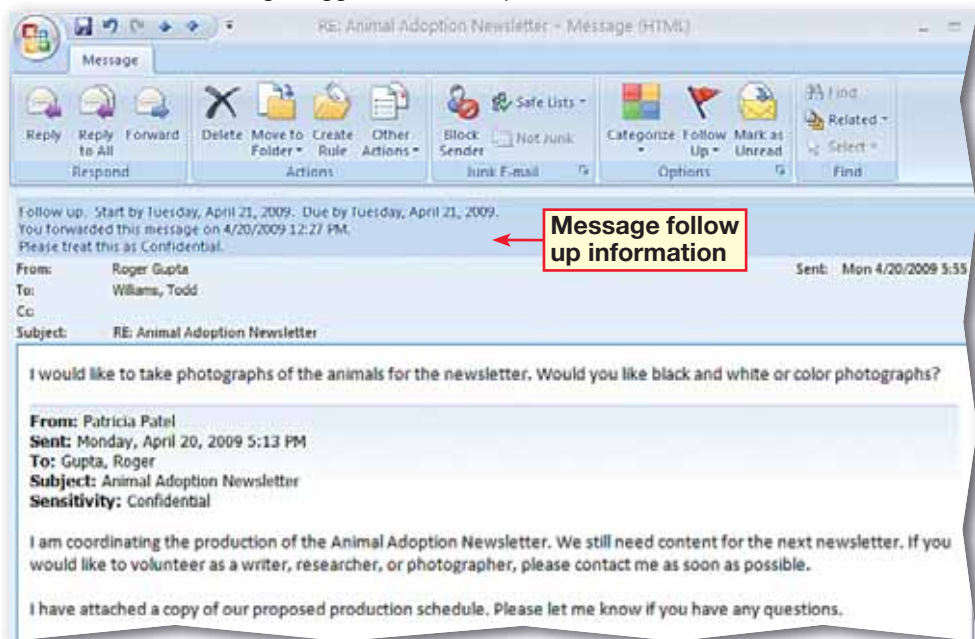
### Microsoft Office 2007

Outlook includes several default flags with dates, such as **Today**, **Tomorrow**, and **Next Week**. To add a flag with a custom date to an open e-mail, choose **Message>Options>Follow Up** and click **Custom**. Then, select the Start and Due dates that you want.

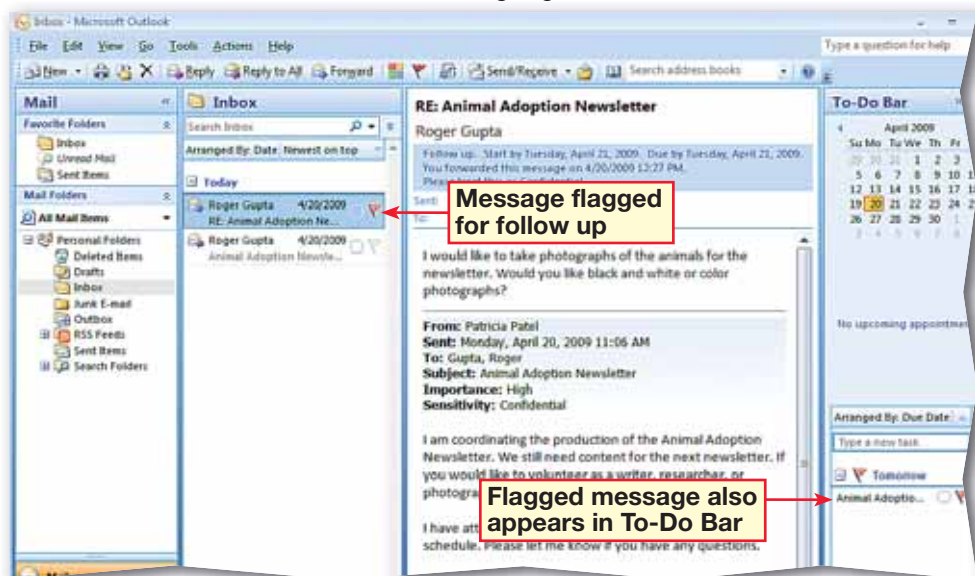
## EXERCISE 1-16 Add or Remove a Flag

Outlook allows you to flag a message in your Inbox to show whether a message you have received requires some sort of follow up and when. The flags will appear next to the message in the Inbox pane and in the To-Do Bar on the right hand side. The To-Do Bar is designed to keep track of all of your tasks in one place. You can also add reminders or even clear the flags if you have performed the required task or no longer need to follow up.




**FIGURE 1.37** Message flagged for follow-up



**FIGURE 1.38** Outlook main screen showing flags



## Step-By-Step

- 1 Select **New Mail Message** .
- 2 In the **To** box, enter your own e-mail address.
- 3 Choose **Options>More Options>Delay Delivery** .
- 4 In the **Message Options** dialog box, under **Delivery options**, make sure the box next to **Do not deliver before** is checked. Click the drop-down arrow and select tomorrow's date.
- 5 **CHECK** Your screen should look like Figure 1.39.
- 6 Click **Close**.
- 7 Click **Send** .
- 8 **CHECK** Your screen should look like Figure 1.40.

Continue to the next exercise.

### You Should Know

Click **Delay Delivery** on each message that you want to delay. To delay the delivery of all messages, use the Microsoft Rules and Alerts Wizard.

## EXERCISE 1-17 Delay Delivery of Message

Usually when an e-mail is sent, Outlook starts delivery of the message as soon as the Send button is clicked. However, you can have Outlook delay the delivery until a time of your choosing. If you are writing the message at the end of the work week, for example, and do not want it delivered until the beginning of the next week when the recipient returns to work, you can set Outlook to send the e-mail Monday morning.

FIGURE 1.39 Delayed delivery Message Options dialog box

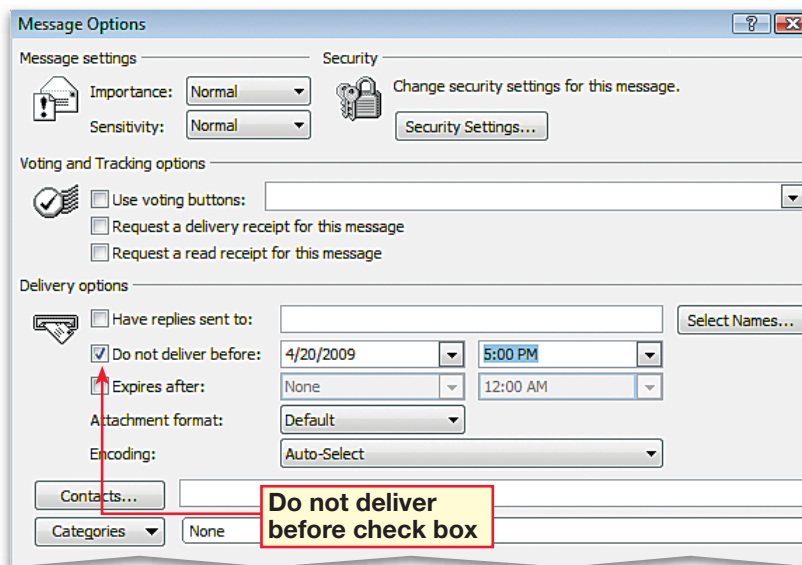
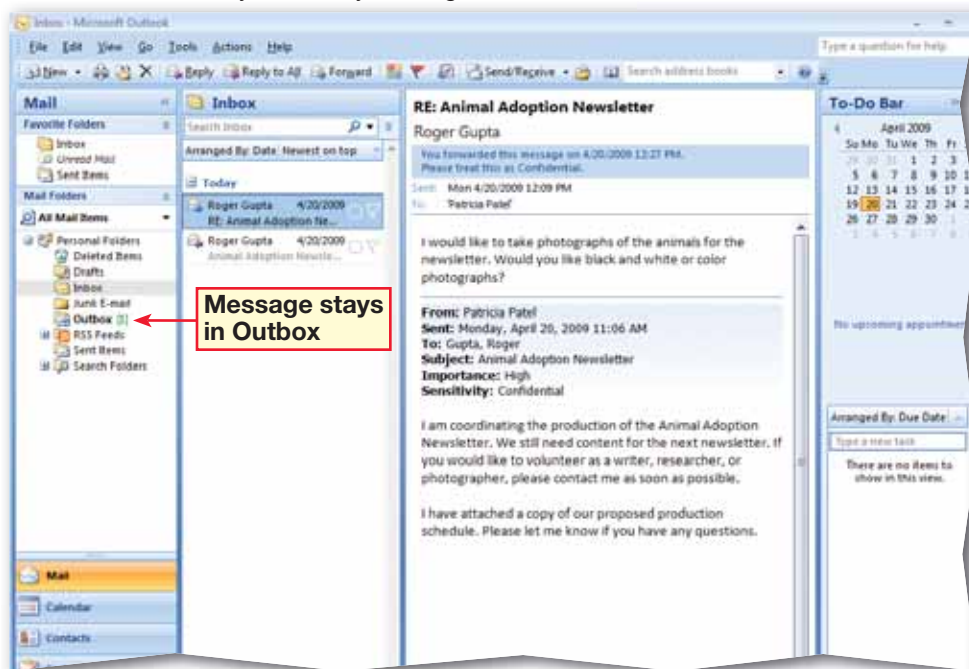




FIGURE 1.40 Delayed delivery message in Outlook



## Step-By-Step

- 1 Select **New Mail Message** .
- 2 In the **To** box, key the e-mail address of a classmate assigned by your teacher.
- 3 In the **Subject** box, key: **Production meeting**.
- 4 In the body of the e-mail, key: **Please make arrangements to attend a production meeting today at 4 p.m.**
- 5 Choose **Options>Tracking** and click the check box next to **Request a Read Receipt**.
- 6 **CHECK** Your screen should look like Figure 1.41.
- 7 Click **Send** .
- 8 When you receive the e-mail from your classmate, double-click it in the **Inbox** pane.
- 9 **CHECK** Your screen should look like Figure 1.42. Click **Yes** to return a **Read Receipt**.
- 10 Select the **Read: Production meeting** mail to display it in the **Reading** pane.

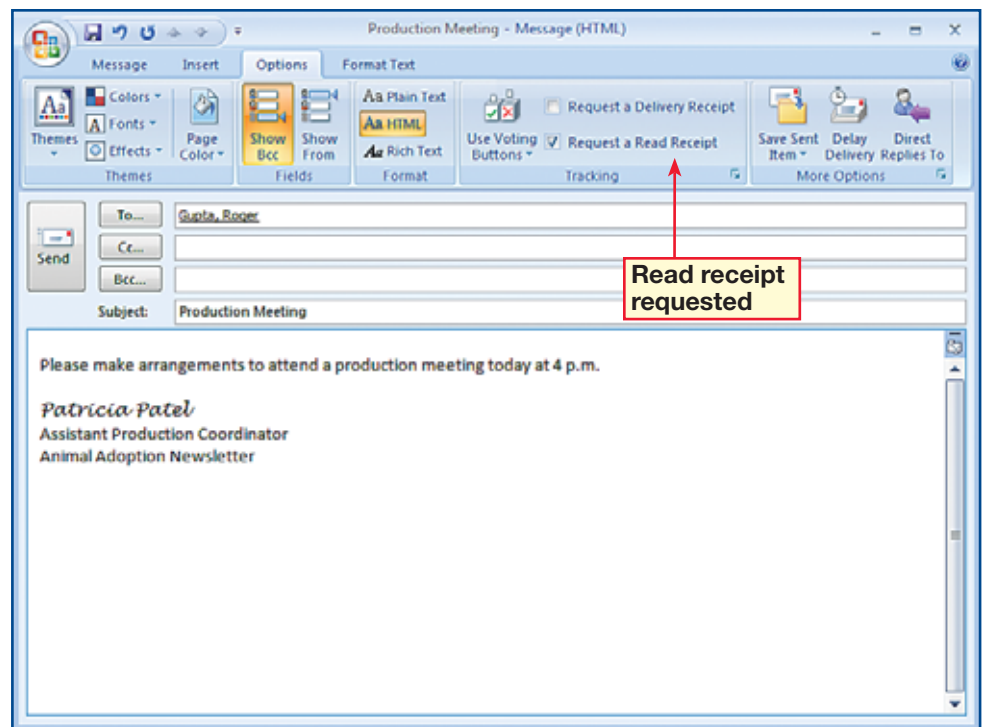
 Continue to the next exercise.

## EXERCISE 1-18 Request Read or Delivery Receipts

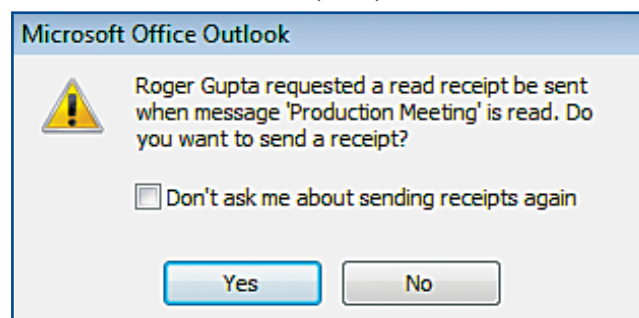


Some e-mail messages that you send might be so important that you need to know whether the recipient has read, or even received, them. This is especially true if the recipient has not sent you a reply. You can send a message in Outlook with read or delivery receipts. If the recipient agrees, Outlook will notify you when the message has been received or read.


**FIGURE 1.41** Production meeting e-mail



**FIGURE 1.42** Read Receipt request




## Step-By-Step


**1** Select **New Mail Message** . In the **To** box, key the e-mail address of a classmate.

**2** In the **Subject** box, key: **4:00 p.m. production meeting**.

**3** In the body of the message, key: **Will you be at the meeting today?**


**4** **CHECK** Your screen should look like Figure 1.43.

**5** Choose **Options>More Options>Direct Replies To** .

**6** In the **Message Options** box, under **Delivery options**, key the e-mail address that is in the **To** box of the message in the **Have replies sent to** box. Click **Send** .

**7** **CHECK** Your dialog box should look similar to Figure 1.44.

**8** When you receive your classmate's e-mail in the **Inbox**, open it.

**9** Click **Reply** . Note that your e-mail address appears in the **To** box. Close the reply message. Close the original message.

 *Continue to the next exercise.*

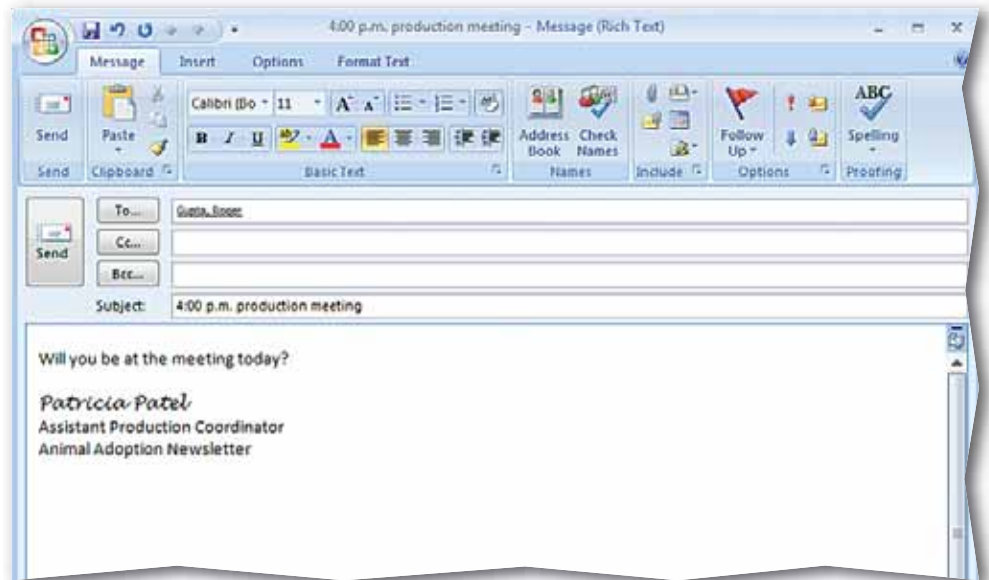
## EXERCISE 1-19

### Request Replies Sent to a Specific Address

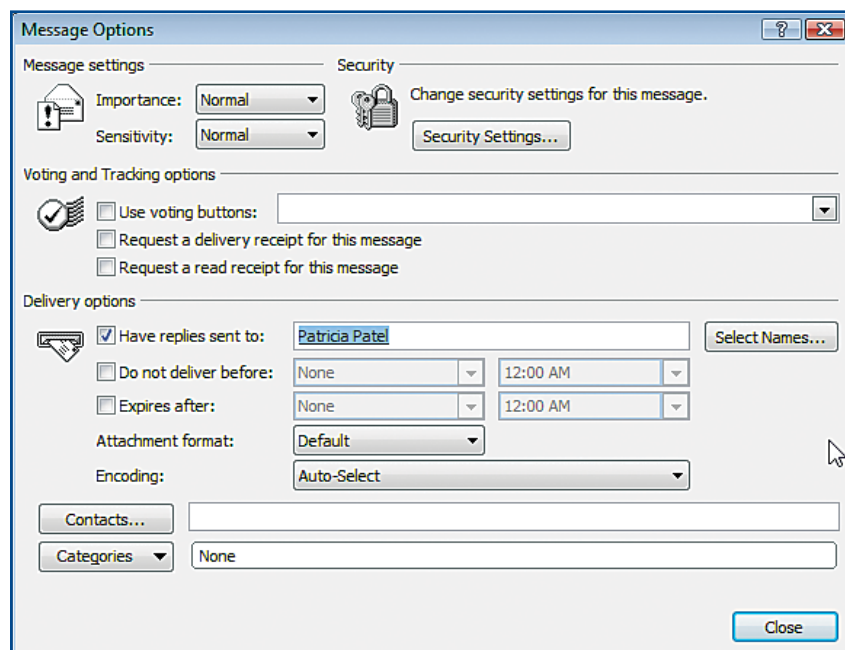


When you reply to a message in Outlook, your response normally is returned to the sender of the e-mail. Outlook allows you to direct the replies to an e-mail to a specific address that may or may not be that of the sender of the original message. If you are sending a message on behalf of someone else, or if a coworker is handling your correspondence while you are on vacation, this feature can be helpful.





**FIGURE 1.43** Production message



**FIGURE 1.44** Redirecting replies to an e-mail message



## Step-By-Step

- 1 Select **New Mail Message** .
- 2 In the **To** box, key the e-mail address of a classmate assigned by your teacher.
- 3 In the **Subject** box, key: **Staff meeting**.
- 4 In the body of the e-mail, key: **Will you be attending the 4 p.m. production staff meeting?**
- 5 Choose **Options>Tracking>Use Voting Buttons**  and click **Yes;No**.
- 6 Click **Send** .
- 7 In the **Inbox** pane, open the new message.
- 8 Choose **Message>Respond>Vote**  and select **Yes**.
- 9 **CHECK** Your screen should look like Figure 1.45. Click **OK** in the confirmation box.
- 10 **CHECK** Your screen should look like Figure 1.46.

 Continue to the next exercise.

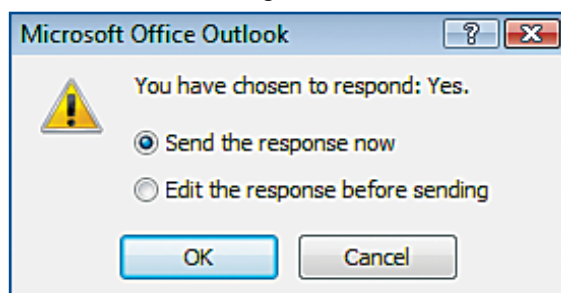
## EXERCISE 1-20

### Create Polls Using Voting Buttons

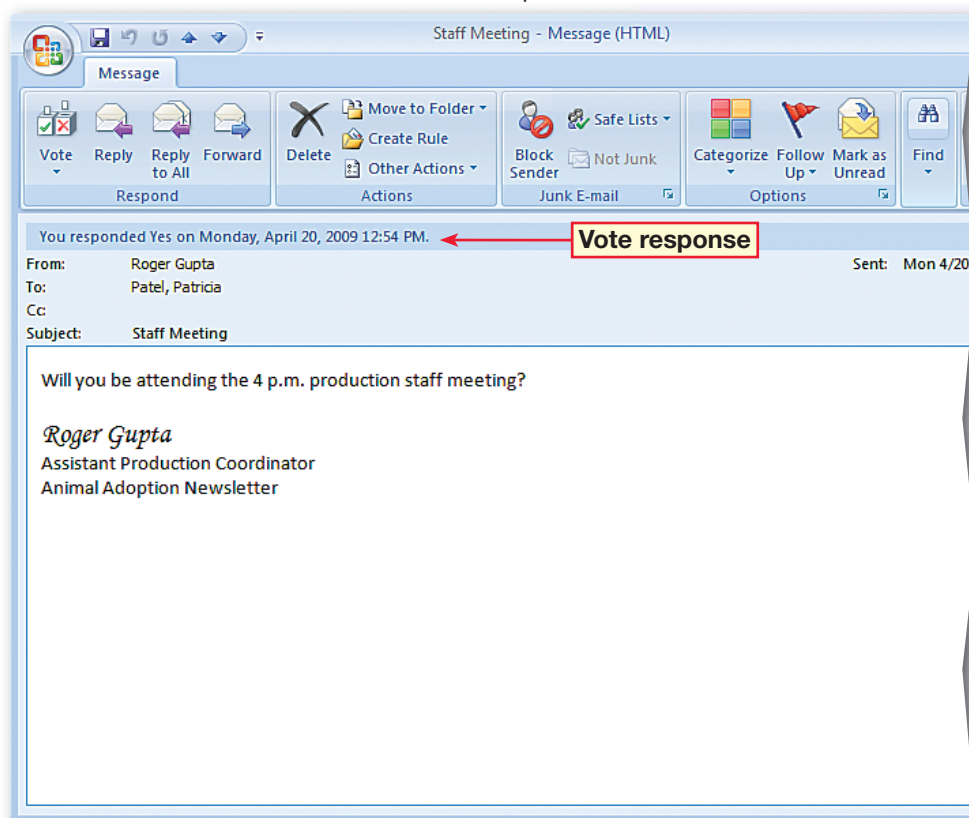


If you would like to see what several recipients think about a topic, Outlook allows you to create a poll using voting buttons that are embedded in the message screen. You can ask a simple yes or no question and recipients can respond accordingly without having to key a personalized response.



**FIGURE 1.45** Message with confirmation of vote



**FIGURE 1.46** Results of vote e-mail in Inbox pane



## Step-By-Step

- 1 Select **New Mail Message** .
- 2 In the **To** box, key the address of a classmate assigned by your teacher.
- 3 In the **Subject** box, key: **Ticket Request**.
- 4 In the message body, key: **I will require 2 tickets to the Animal Adoption Newsletter Fundraising party. Please charge the newsletter account #123-4567.**
- 5 **CHECK** Your screen should look like Figure 1.47.
- 6 Choose **Message>Options>Digitally Sign Message** .
- 7 **CHECK** Your screen should look like Figure 1.48.

 Continue to the next exercise.

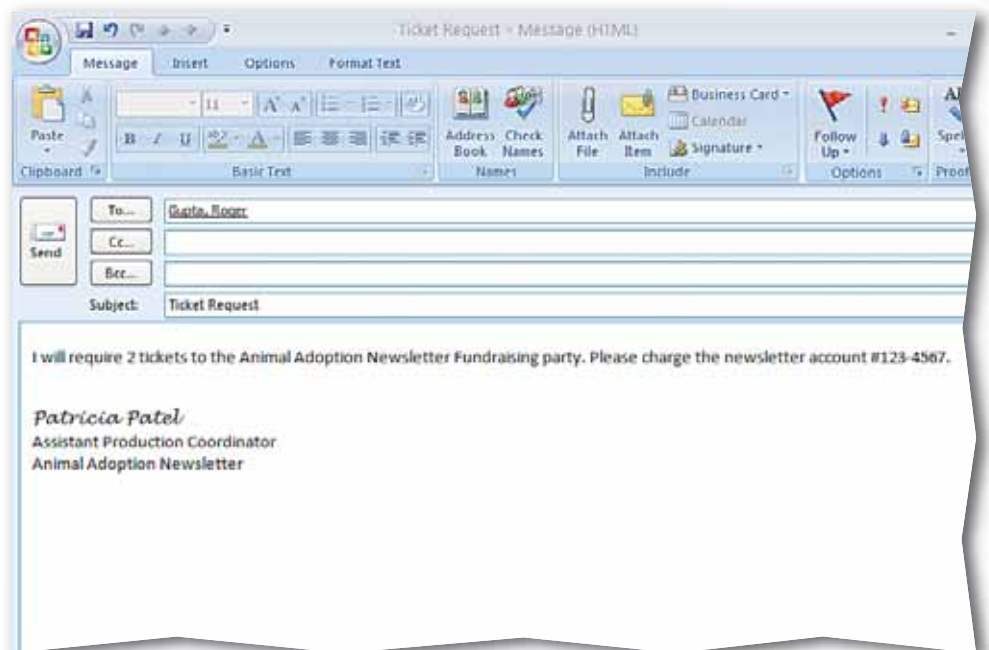
### Microsoft Office 2007

To send digitally signed or encrypted e-mail, both the sender and receiver must have a certificate of authority (COA) installed and configured on their computers. To install a COA, choose **Tools>Trust Center>E-mail Security** and click **Get a digital ID**. Outlook will display a list of vendors.

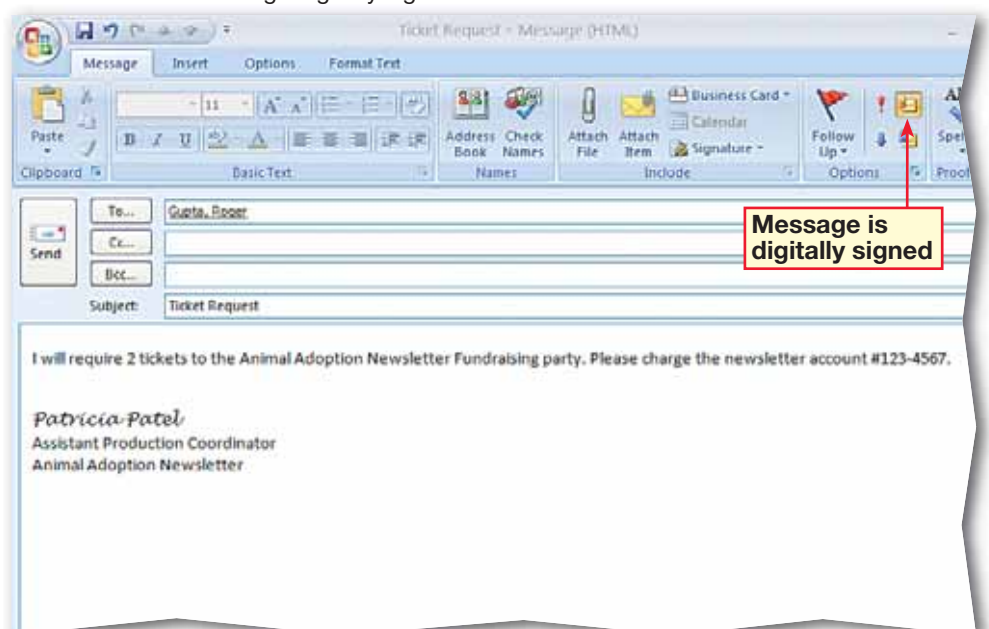
## EXERCISE 1-21 Digitally Sign a Message

When you are sending mail in the traditional way, a signature usually informs the recipient that the message is from you and that the recipient can trust the information in the message. Outlook allows you to digitally sign an e-mail so that the recipient can be sure that the message was sent by you.

**FIGURE 1.47** Message to be digitally signed



**FIGURE 1.48** Message digitally signed



## Step-By-Step

- 1 In the e-mail message, choose **Message>Options>Encrypt**.
  - 2 Click **Send**.
  - 3 **CHECK** Your screen should look like Figure 1.49.
  - 4 Open the encrypted message.
  - 5 **CHECK** Your screen should look like Figure 1.50.
  - 6 Close the message.
- Continue to the next exercise.

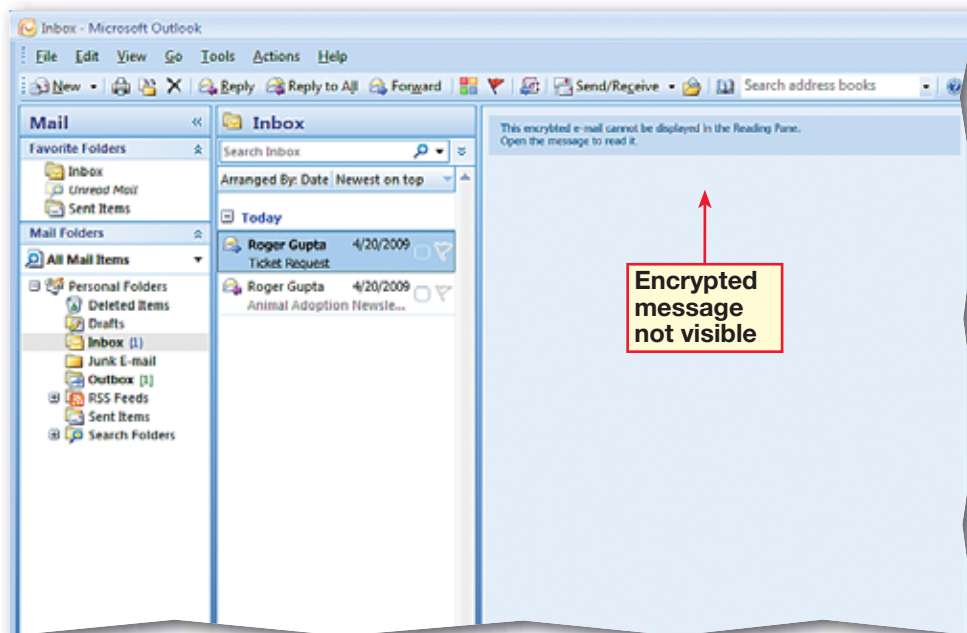
### Tech Tip

You must have the public key—a type of code—of the sender in order to read an encrypted message. To get the key, have the sender send you a digitally signed message, then add the sender as a contact in your address book.

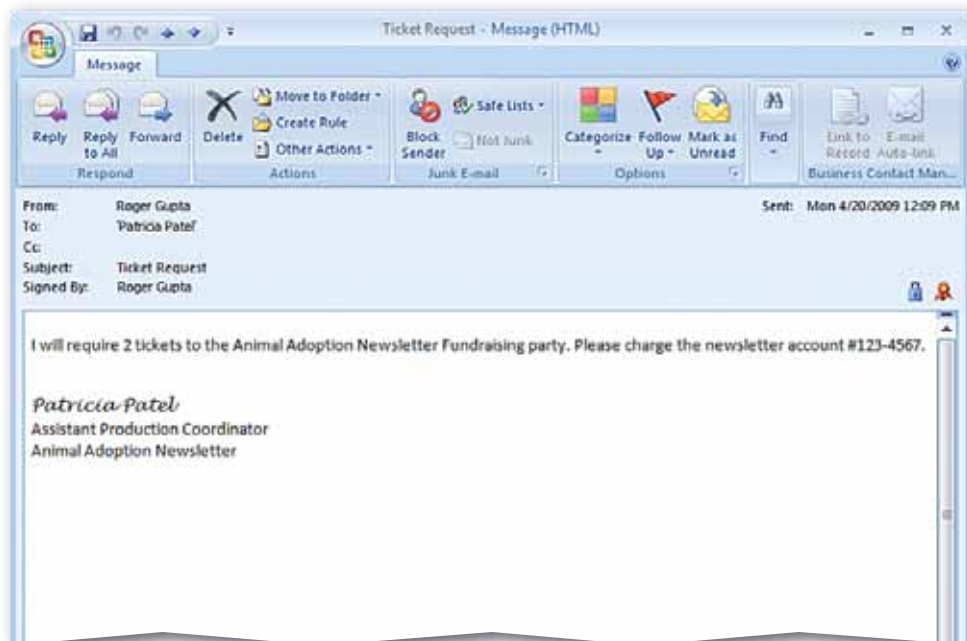
## EXERCISE 1-22 Encrypt a Message

In addition to letting you digitally sign an e-mail message, Outlook allows you to **encrypt**, or scramble, data to secure a message so that only the recipient can read the information. The encryption applies not only to the content of the message but also any attachments to the e-mail.

**FIGURE 1.49** Encrypted message on Outlook screen



**FIGURE 1.50** This message has been unencrypted and opened by the recipient



## Step-By-Step

- 1 On the **Menu** bar, choose **Tools>Out of Office Assistant**.
- 2 In the **Out of Office Assistant** dialog box, click **Send Out of Office auto-replies**.
- 3 Click the **Inside my Organization** tab. Key: **I will be out of the office after 1:00 pm on May 8.**
- 4 **CHECK** Your dialog box should look similar to Figure 1.51.
- 5 Click the **Outside my Organization (On)** tab. Key: **I will be out of the office on the afternoon of May 8.**
- 6 Click **OK**.
- 7 **CHECK** Your screen should look similar to Figure 1.52.
- 8 On the Status bar, click **Out of Office**. Select **Turn off Out of Office auto-replies**.
- 9 Exit Outlook.

## EXERCISE 1-23

### Create Out of Office Messages

If you are on a Microsoft Exchange server, you can set up the Out of Office Assistant to reply to incoming e-mails for you automatically.

FIGURE 1.51 Out of Office Assistant

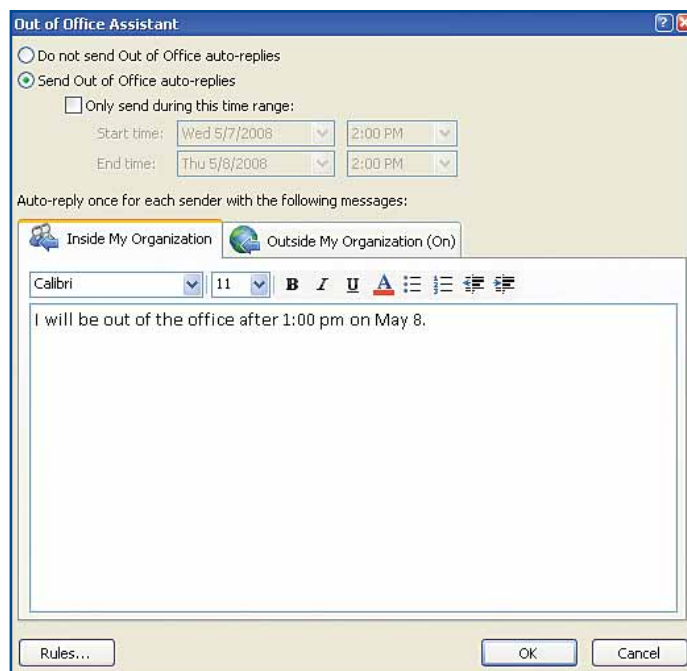
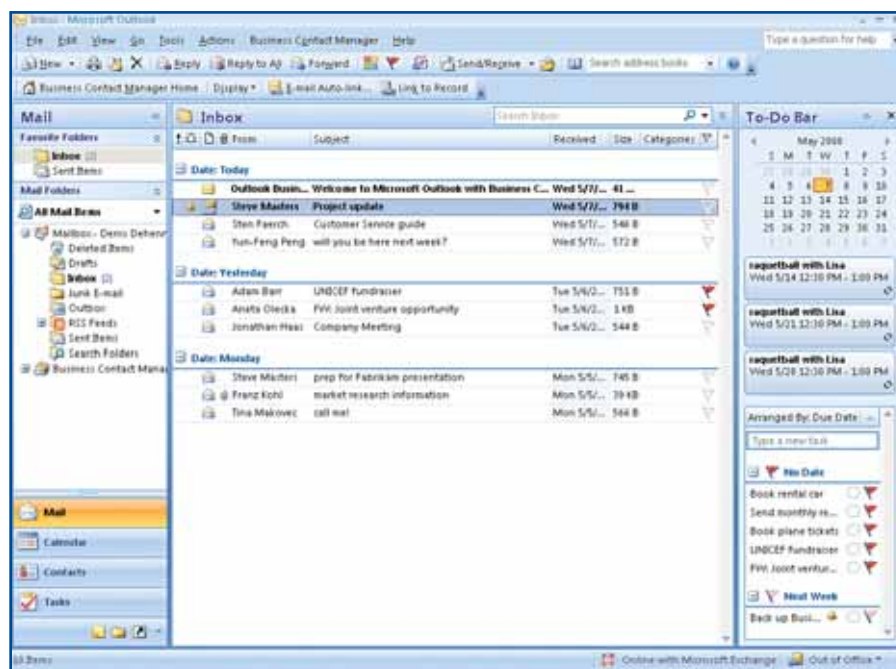


FIGURE 1.52 Inbox with Out of Office Assistant active







## Vocabulary

### Key Terms

attachment

delivery options

encrypt

forward

Importance

Inbox pane

Navigation pane

Reading pane

Sensitivity

signature

To-Do Bar

### Academic Vocabulary

adjust

edit

expand

locate

### Review Vocabulary

Complete the following statements on a separate piece of paper. Choose from the Vocabulary list on the left to complete the statements.

1. A \_\_\_\_\_ is your name and other information about yourself that appears at the end of messages you create. (p. 15)
2. To send an e-mail that you have received on to other recipients is to \_\_\_\_\_ the message. (p. 20)
3. You can \_\_\_\_\_ messages that you have saved in the Drafts folder. (p. 3)
4. The \_\_\_\_\_ is where you can see a list of messages you have received. (p. 3)
5. A(n) \_\_\_\_\_ is a separate file that you can include with an e-mail message. (p. 6)

### Vocabulary Activity

6. Use e-mail to create a new twist on traditional flash cards.
  - Choose a partner and send an e-mail that contains just one vocabulary word.
  - Have your partner respond with the definition.
  - Using the Vocabulary list, key the definition and send it back.
  - Switch roles and repeat the exercise.

### Review Key Concepts

Answer the following questions on a separate piece of paper.



7. What is the part of the screen that reveals the text of an e-mail message in the Inbox? (p. 3)
 

A. To-Do Bar	C. Navigation pane
B. Reading pane	D. All of the above
8. Which of the following can you do with Outlook? (p. 9, 20, 22)
 

A. Save an attachment	C. Delay delivery of e-mail message
B. Forward a message	D. All of the above
9. What is the quickest way to add your contact information to an e-mail message before sending it? (p. 15)
 

A. Key your name and phone number at the end of the message	C. Attach a file containing your contact information
B. Paste your name and phone number from another application	D. Insert a signature

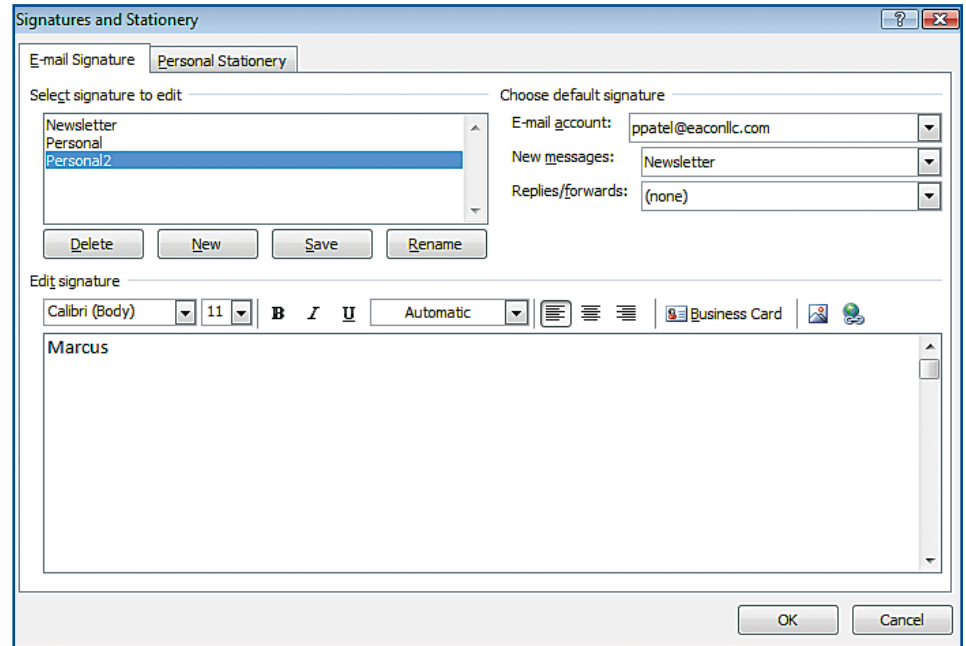
## Step-By-Step

- 1 Choose **Tools>Options**. Click the **Mail Format** tab. Under **Signatures**, click **Signatures**.
- 2 In the **Signatures and Stationery** dialog box, click **New**.
- 3 In the **Enter a name for your new signature** box, key: **Personal2**. Click **OK**.
- 4 Click in the blank **Edit signature** box. Key: **Marcus**. (See Figure 1.53.)
- 5 Highlight the text **Marcus**. Click the **Font** drop-down arrow and select **Comic Sans MS, 12 pt**. Change the **Font Color** to **Purple**.
- 6 Click **OK** in the **Signatures and Stationery** box. Click **OK** in the **Options** box.
- 7 Click **New Mail Message** . Choose **Insert>Include>Signature** . Select **Personal2**.
- 8 **iCHECK** Your screen should look like Figure 1.54. Save your e-mail as: **o1rev-[your first initial and last name]1**. Exit Outlook.

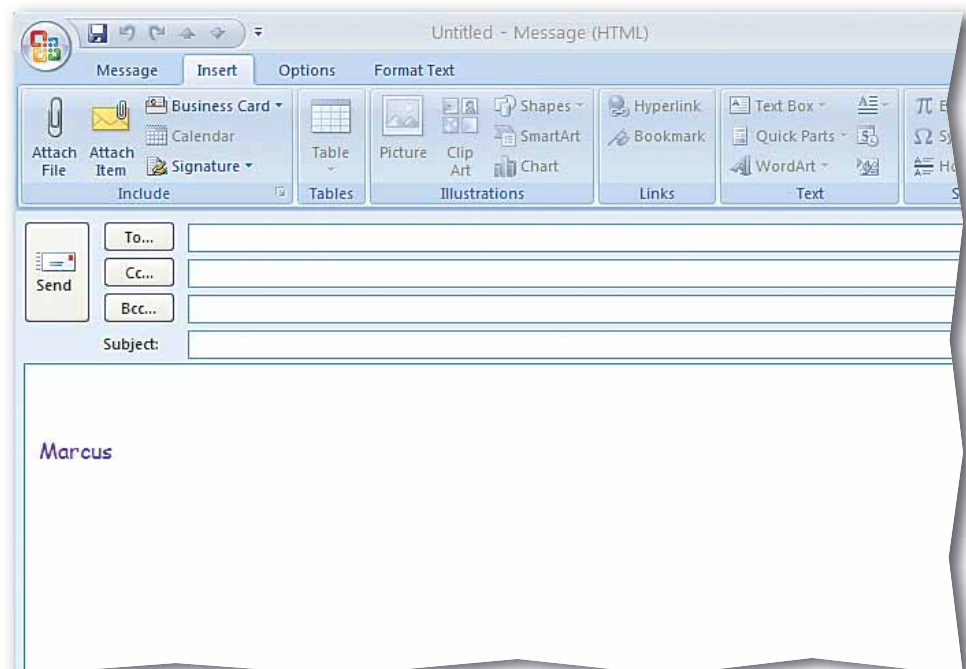
## 1. Create an E-mail Signature

Follow the steps to complete the activity.



**FIGURE 1.53** Personal2 signature



**FIGURE 1.54** New message with signature



## Step-By-Step

- 1 Open your saved **o1rev-1** file.
- 2 In the **To** box, key the e-mail address of a classmate assigned by your teacher.
- 3 In the **Subject** box, key: **Study Time**.
- 4 In the body of the message, key the text shown in Figure 1.55.
- 5 Choose **Insert>Include>Attach File** .
- 6 Locate the data file **Study.docx**. Click **Insert**.
- 7 Choose **Message>Options>High Importance** .
- 8 **CHECK** Your screen should look like Figure 1.56. Click **Send**.
- 9 Save your e-mail as: **o1rev-[your first initial and last name]2**.
- 10 Close the message. Exit Outlook.

## 2. Compose an E-mail

Follow the steps to complete the activity.

FIGURE 1.55 New message

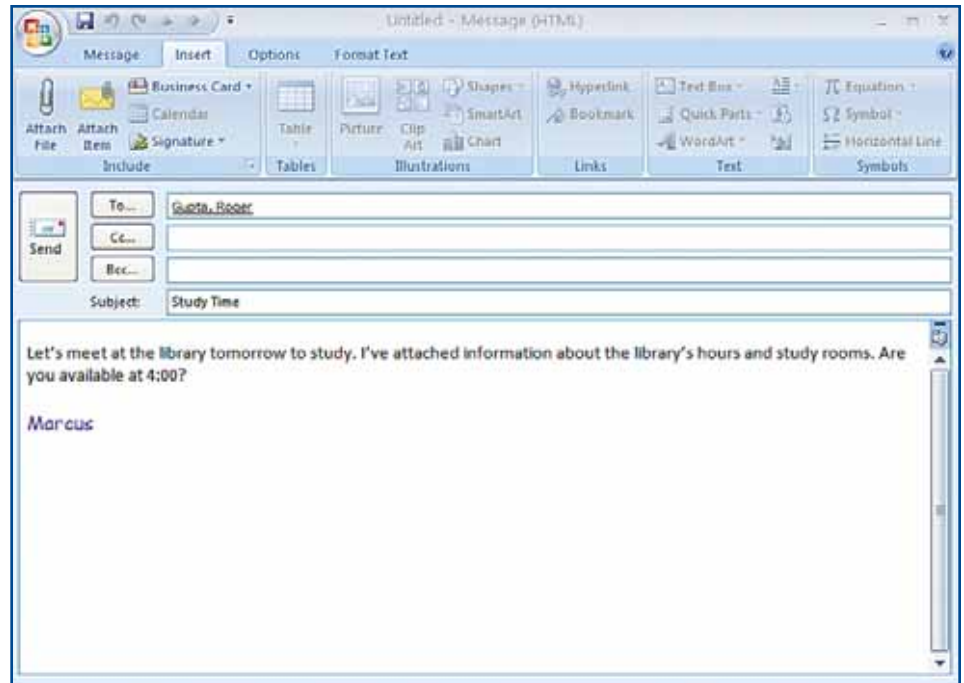
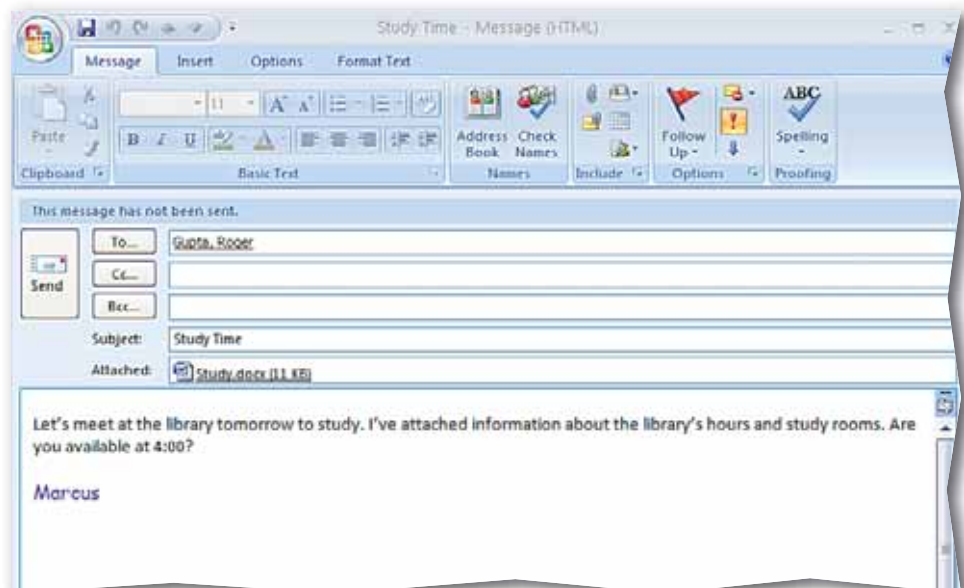


FIGURE 1.56 E-mail with attachment



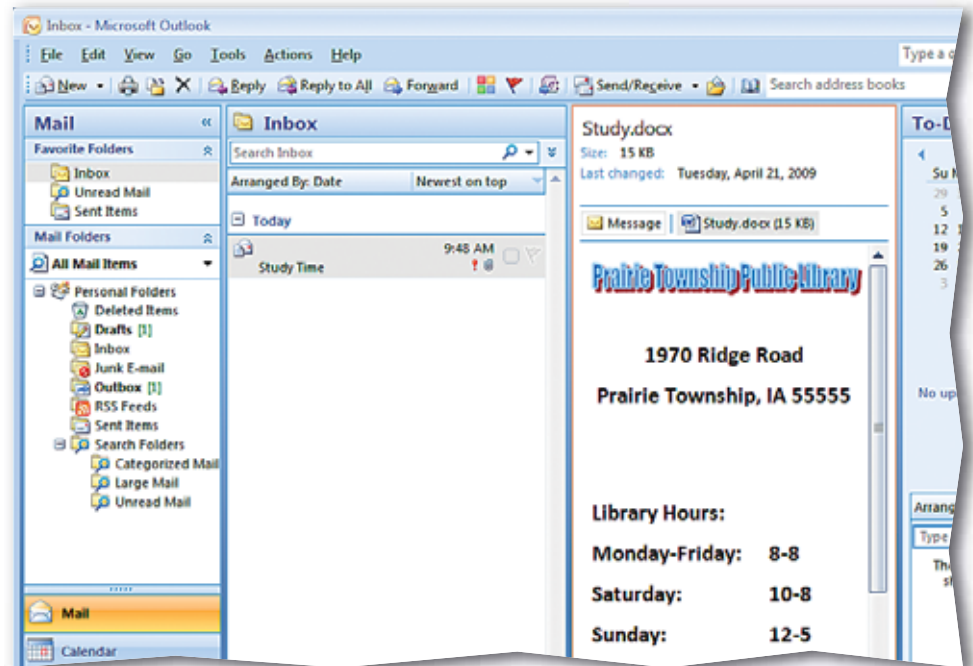
## Step-By-Step

- 1 Open the **Study Time** e-mail in the **Inbox** pane.
- 2 In the **Reading** pane, click the **Study.docx** attachment.
- 3 Click **Preview file**.
- 4 **CHECK** Your screen should look like Figure 1.57.
- 5 In the **Reading** pane, click the **Message** icon to see the **Study Time** e-mail preview.
- 6 **CHECK** Your screen should look like Figure 1.58.

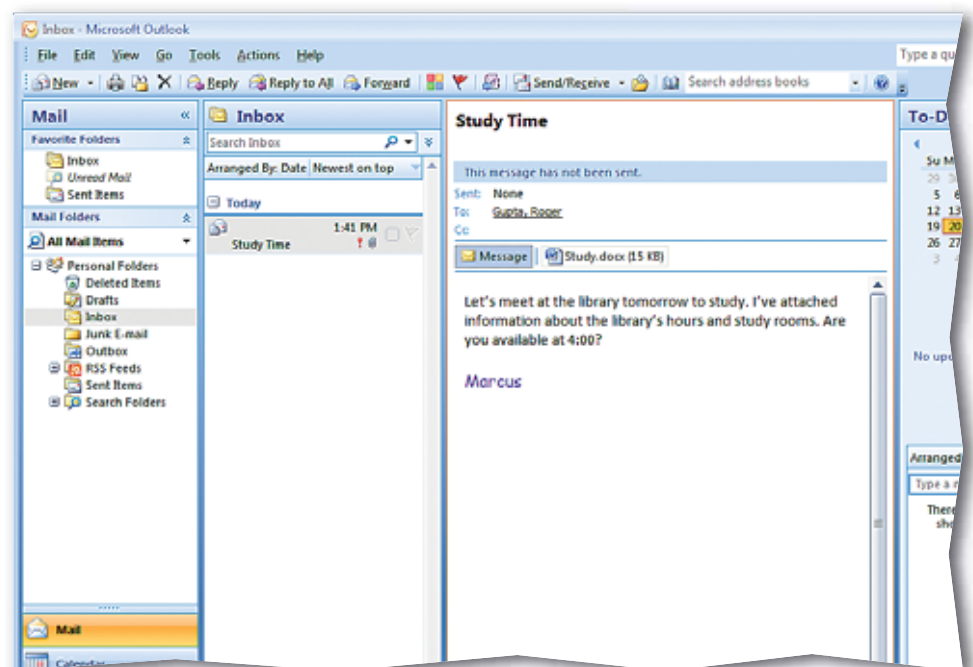
## 3. Preview an Attachment

Follow the steps to complete the activity.

**FIGURE 1.57** Study.docx attachment preview



**FIGURE 1.58** Outlook main screen



## Step-By-Step

- 1 Create a new default signature for:  
[Your Name]  
Project Manager  
New Product Development.
- 2 Open a new message.
- 3 In the **To** box, key the e-mail address supplied by your teacher.
- 4 In the **Subject** box, key: **Revised Schedule**.
- 5 Key the message text shown in Figure 1.59.
- 6 Attach the data file **Revised\_Schedule.docx** to the e-mail.
- 7 Set the Importance to **High**.
- 8 Set the Sensitivity to **Confidential**.
- 9 Flag the e-mail so that you will follow up on it today.
- 10 **CHECK** Your screen should look similar to Figure 1.60.
- 11 Save the e-mail as: o1rev-[your first initial and last name]5. Send the message. Exit Outlook.

## 4. E-mail an Attachment

You are the project manager for a new product being developed by your company. The deadlines for your project have been changed. You decide to send a copy of the revised schedule to one of your coworkers.

FIGURE 1.59 E-mail message

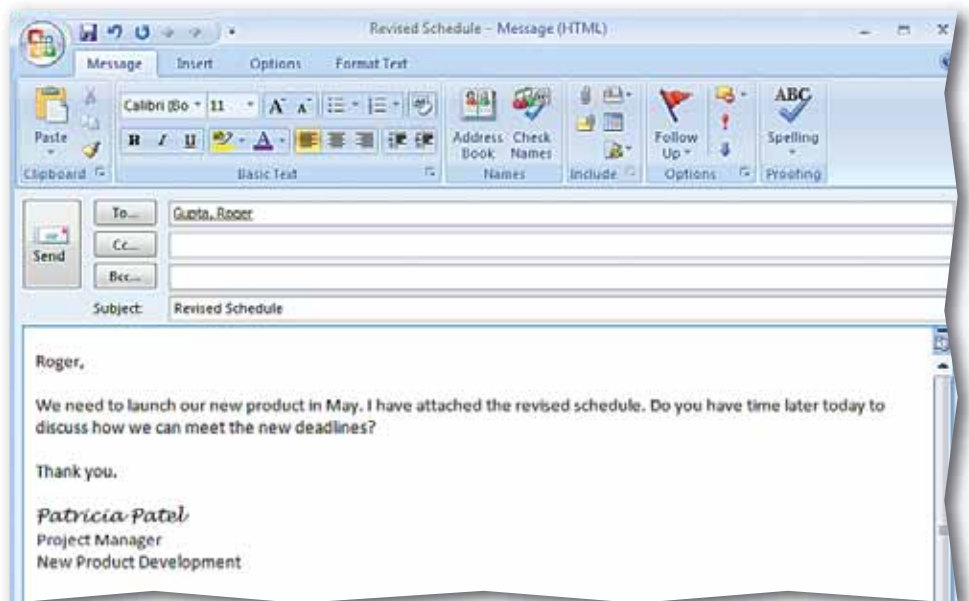
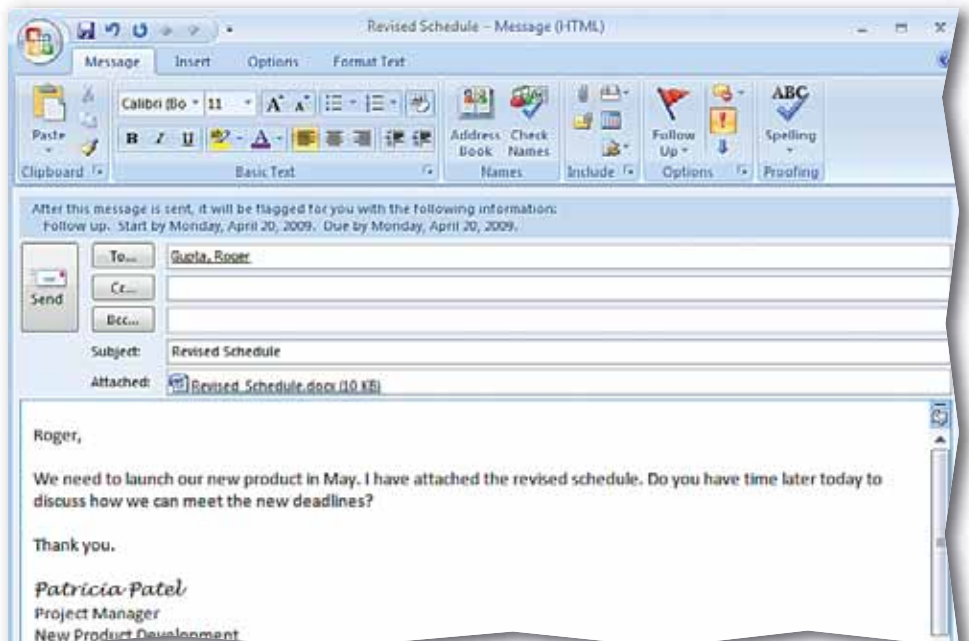





FIGURE 1.60 Flagged e-mail



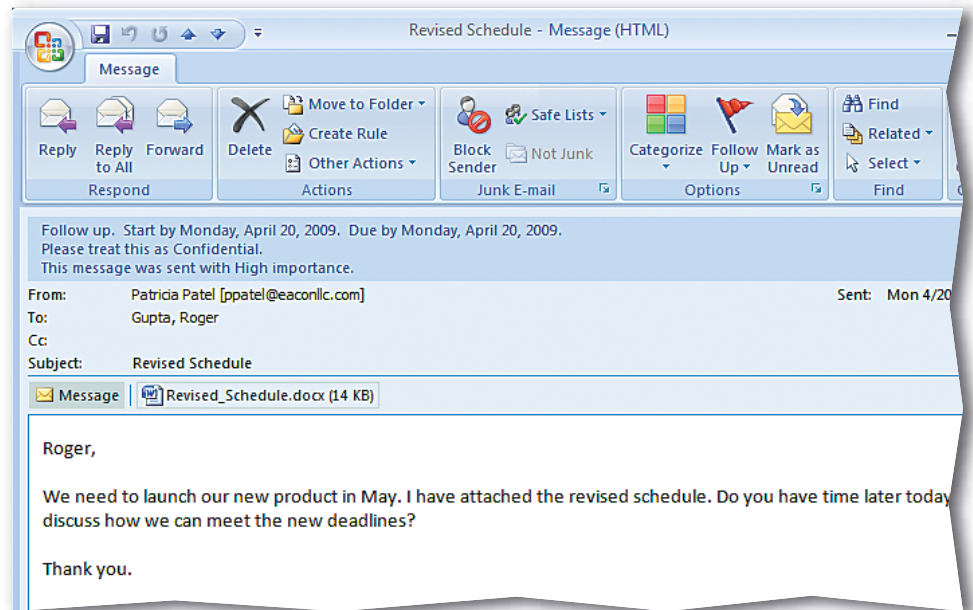
## Step-By-Step

- 1 Under **Mail Folders**, select **Sent Items**.
- 2 Open the **Revised Schedule** e-mail.
- 3 **CHECK** Your screen should look like Figure 1.61.
- 4 Choose **Message>Actions>Other Actions** . Click **Resend this message**.
- 5 In the **To** box, highlight the e-mail address of the prior recipient and key a different address provided by your teacher.
- 6 In the body of the message, change **Roger** to the appropriate name. Save the e-mail as: **o1rev-[your first initial and last name]4**.
- 7 **CHECK** Your screen should be similar to Figure 1.62. Click **Send** .
- 8 Click **Close**  to close the previously sent message. Exit Outlook.

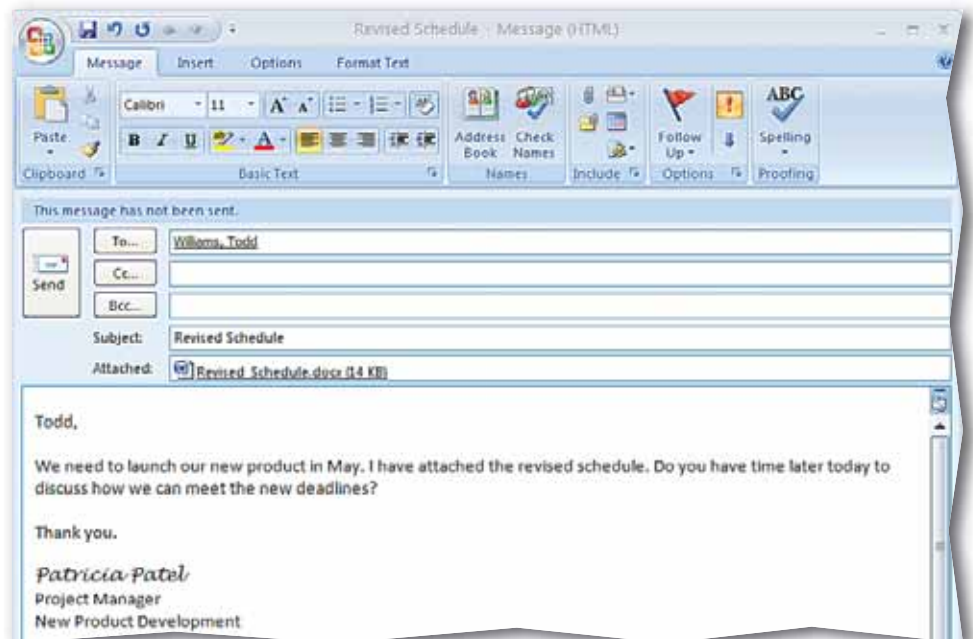
## 5. Resend a Message

Your coworker says he has a different project that takes priority, so you decide to resend the message to another coworker who has time to complete the project according to the revised schedule.

**FIGURE 1.61** Previously sent Revised Schedule e-mail



**FIGURE 1.62** Resending Revised Schedule e-mail



## 6. Beyond the Classroom Activity



**Language Arts: Communicate by E-mail** The company you work for is hiring a new human resources manager. Your supervisor has given you a list of candidates for the position. You have created an interview schedule and now you need to e-mail it to your supervisor.

Using what you have learned in this lesson:

- Create a brief e-mail to your supervisor. Tell her that the interview schedule she requested is attached.
- Attach the data file **Schedule.docx** to your e-mail.
- Flag the e-mail as important.
- Send the e-mail to your teacher.

Save your e-mail as: **o1rev-[your first initial and last name]6**.

## 7. Standards at Work Activity



### Microsoft Certified Application Specialist Correlation

**Outlook 1.2** *Create and manage your signature and automated messages*

**Contact Information** A personal signature added at the end of your e-mails adds a level of consistency and professionalism to your messages. It also can communicate valuable contact information.

Create a signature that includes your:

- Name
- Company
- Business telephone number
- E-mail address

Format your name in a different font and change the color of your telephone number. Open a new message with the signature and save the message as: **o1rev-[your first initial and last name]7**. Send the e-mail with your new signature to your teacher's e-mail address.

## 8. 21st Century Skills Activity

**Emphasize Punctuality** When people are not punctual, a business loses time, money, and efficiency. You are a project manager in charge of five people. Compose an e-mail message to your group proposing a time to meet to discuss the importance of punctuality. Ask each person to send you one reason that being punctual is important. In the message, be sure to add a flag indicating that a reply is required by the end of the following day. Save the e-mail as: **o1rev-[your first initial and last name]8**. Send the e-mail to your teacher's e-mail address.

# LESSON

# 1

## Challenge Yourself Projects

### Before You Begin

**Communication** E-mail has made clear, concise writing more important than ever. Because messages are delivered so quickly, a small miscommunication to one person can have a large impact on several others.

**Reflect** Once you complete the projects, open a Word document and answer the following questions:

1. How do you think e-mail has changed the way businesses communicate?
2. In what ways can e-mail make direct communication more difficult?



### 9. Evaluate E-mail



**Language Arts: Persuasive Essay** Think about the effect e-mail has on your life. Write a persuasive essay stating your opinions about how e-mail contributes to, and detracts from, meaningful communication. Support the use of e-mail as a positive way to communicate *or* as less effective than face-to-face conversations and phone calls. Back up your argument with at least two examples. After you finish your essay, compose an e-mail to your teacher. Write a summary of the essay, attach the essay to the e-mail, and send the e-mail to your teacher. Save your essay as: **o1rev-[your first initial and last name]9**.

### 10. Keep in Touch



**Language Arts: Organize Information** While attending a conference on technology, you obtain the e-mail addresses of three attendees from around the country. When you return home from the conference, you decide to send an e-mail message to the three contacts to ask if they would send you their notes about the sessions they attended. Compose an e-mail message, addressed to all three contacts. Ask whether they can send their notes as attachments. Digitally sign the message and ask the recipients to encrypt their responses. Save the e-mail as: **o1rev-[your first initial and last name]10**.

### 11. Think about Technology



**Language Arts: Perform an Interview** You are writing an article about the conference for your company's corporate newsletter. Interview one of your classmates as though he or she were a participant at the conference. Create a list of four or five questions about how technology affects his or her life. Include:

- What are some examples of technology that you use *every* day (that is, cars, televisions, and so on)?
- How would your life be different if you did not have this technology?
- How do you think your life would be different if you were born 50 years in the future?

After your interview, key the interview results into a Word document. Save the document as: **o1rev-[your first initial and last name]11**. Create a new e-mail message with the subject **o1rev11**. Key a brief summary of what you learned in the interview. Attach the Word document to the e-mail. Send the e-mail to your teacher.



## Key Concepts

- Gather contacts from several e-mail and message sources
- Create, save, and modify contact records
- Create, send, and edit Electronic Business Cards
- Create contacts from Electronic Business Cards
- Create signatures using Electronic Business Cards

## Standards

The following standards are covered in this lesson. Refer to pages xxiv and 715 in the Student Edition for a description of the standards listed here.

### ISTE Standards Correlation

#### NETS•S

2a, 2b, 3b, 3c, 4a, 4b, 4c, 5b, 6a

### Microsoft Certified Application Specialist Standards

Outlook  
4.1, 4.2



Contacts are the cornerstone of good business. As such, there is no substitute for having an accurate and up-to-date list of all your contacts. Outlook's Contacts functions allow you to keep track of vital contact information. Outlook also helps you to share and present that information to others and gather contact information in a fast, effective manner.

## 21st CENTURY SKILLS

**Follow Up** Taking the time to follow up can make a lasting impression. Whether it is after a first job interview, following a key meeting with a client, or notifying a customer that you have shipped an order, following up is an important part of any business or personal relationship. Waiting for someone to get back to you could result in mixed messages and overlooked tasks that could have been avoided with a simple follow-up message. *Can you think of a time when you had to take a more active role in order to meet your goals or avoid misunderstandings?*





## Before You Read

**Partner Up for Success** One of the advantages to sharing your notes with a classmate is that you can exchange information. As you read, ask each other questions about the topics that have been discussed. If you come upon a section that one of you is unfamiliar with, compare the information that you both have about the section. You can also compare notes before you start quizzing each other.

### Read To Learn

- Create contact records based on other contacts, message headers, and from Electronic Business Cards.
- Explore ways to store contact information in order to easily find friends' and colleagues' e-mail addresses, mailing addresses, and phone numbers.
- Edit and send an Electronic Business Card and use the business card as a signature in e-mail messages.

### Main Idea

Create, organize, and personalize your contacts using Outlook's Contacts functions.

### Vocabulary

#### Key Terms

contact	format
contact record	header
Electronic Business Card	update

### Academic Vocabulary

You will find these words in your reading and on your tests. Make sure you know their meanings:

create  
distribute  
maintain

### Quick Write Activity



**Describe** On a separate sheet of paper, list four types of information that you think every contact record should contain. Make a list of other information that you might want to include.

### Study Skills

**Make a Roadmap** Planning for a big test begins long before the day of the exam. Start planning to tackle the test early by plotting out a rough calendar two weeks before the exam and putting down studying benchmarks along the way. Your study calendar should become less crowded just before the test if you hit all your goals along the way, leaving you knowing the material well in advance and avoiding last-minute cram sessions.

## Academic Standards

### English Language Arts



**NCTE 3** Use language to accomplish individual purposes.

**NCTE 4** Adjust use of language to communicate effectively with a variety of audiences.

**NCTE 5** Employ a wide range of strategies while writing to communicate effectively with different audiences.

**NCTE 12** Use spoken, written, and visual language to accomplish individual purposes.

## Step-By-Step

- 1 Start Outlook.
- 2 In the **Navigation** pane, click **Contacts**.
- 3 Click **New Contact** .
- 4 In the **Full Name** box, key the name of the classmate assigned by your teacher.
- 5 In the **E-mail** box, key the address of the classmate assigned by your teacher (see Figure 2.1).
- 6 Click **Save & Close** . In the **Navigation** pane, under **Current View**, click **Business Cards**.
- 7 **CHECK** Your screen should look like Figure 2.2.

 Continue to the next exercise.

### Shortcuts

To create a contact using a keyboard shortcut, click

**CTRL + SHIFT + C**.

### Microsoft Office 2007

In Microsoft Office 2007, if you switch to **Address Cards** view in **Contacts** and close Outlook, **Address Cards** view becomes your default view until you change views.

## EXERCISE 2-1 Create a Contact

A **contact** is a person or business with whom you interact on a regular basis. Your contacts might be coworkers, companies, friends, family, or work-related acquaintances. You can use Outlook to store contact names, e-mail addresses, and phone numbers. Contact views allow you to find and view information in a format that best fits your needs. In Outlook 2007, the default Contact view is Business Cards view.

FIGURE 2.1 New contact information

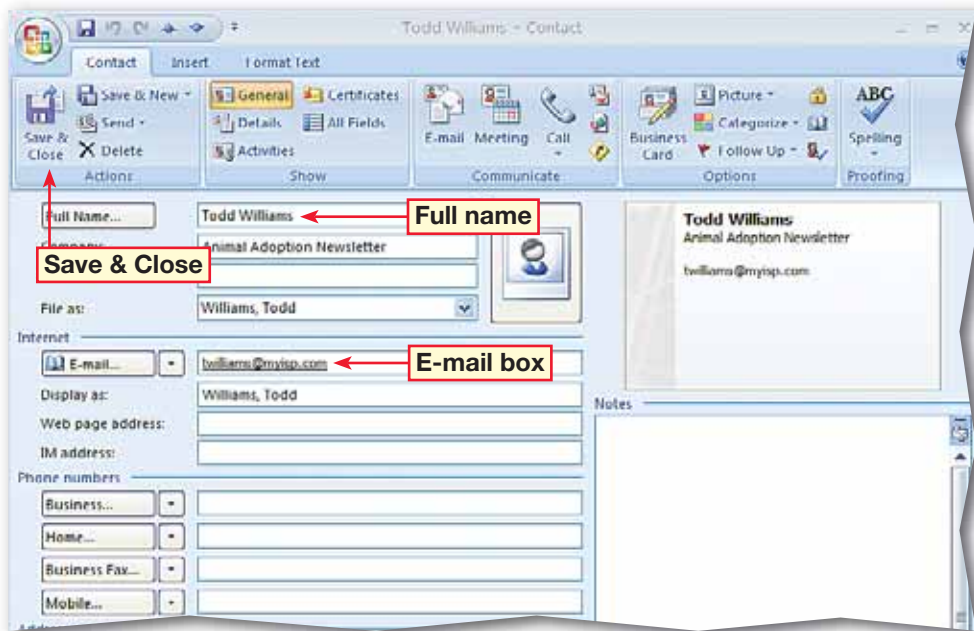
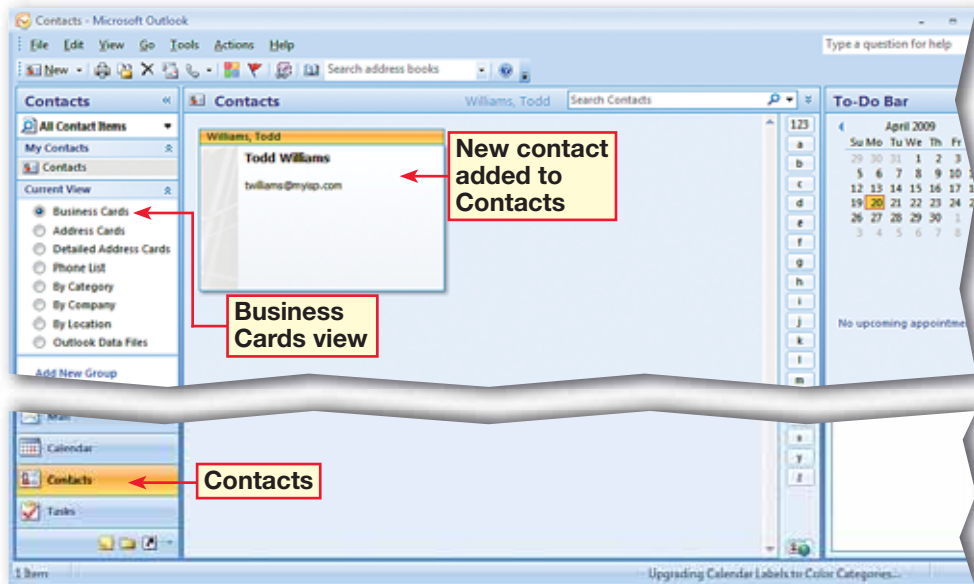






FIGURE 2.2 New contact added to Contacts




## Step-By-Step

- 1 In the **Contacts** pane, double-click the new business card. Choose **Contact>Actions>Save & New** .
- 2 In the **Full Name** box, key: **Tom Wilson**. In the **E-mail** box, key: **twilson@myisp.com**. In the **Display as** box, key: **Wilson, Tom**.
- 3 In the **Company** box, key: **Animal Adoption Newsletter**. Press **ENTER**.
- 4 **CHECK** Your screen should look like Figure 2.3.
- 5 Click the **Save & New**  drop-down arrow and select **New Contact from Same Company** .
- 6 In the **Full Name** box, key: **Patricia Patel**. In the **E-mail** box, key: **ppatel@myisp.com**. Click **Save & Close**  twice.
- 7 **CHECK** Your screen should look like Figure 2.4.

 Continue to the next exercise.

### Microsoft Office 2007

In Office 2007, some buttons also have drop-down menus. For example, **Save & New**  has a drop-down arrow containing more options.

## EXERCISE 2-2

### Create a Contact Based on another Contact

In many instances, several of your contacts might work for the same company or belong to the same organization, or have any number of similar relationships. You can **create**, or set up, new contacts from within these existing ones based on those common connections.

FIGURE 2.3 New contact

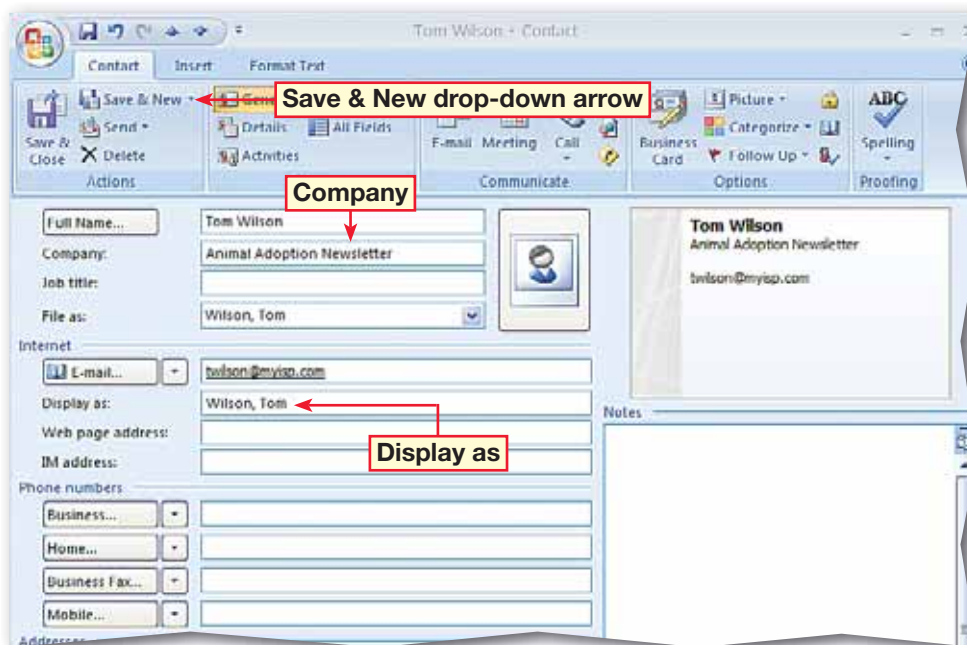
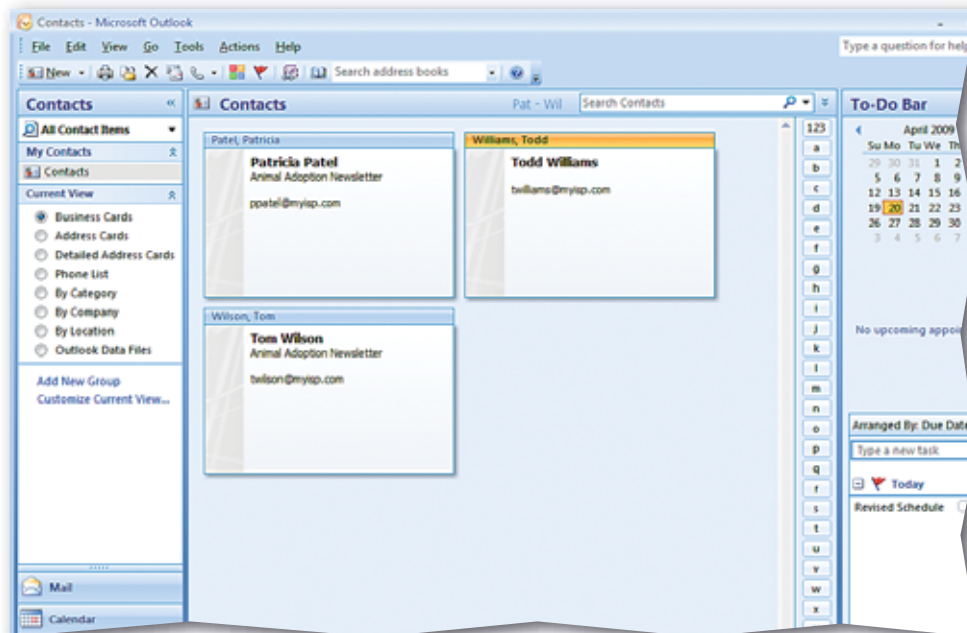


FIGURE 2.4 New contacts in Contact view



## Step-By-Step

- 1 In the **Navigation** pane, click **Mail**.
- 2 Double-click the **FW: Tom Thompsen** e-mail in the **Inbox** to open it.
- 3 **CHECK** Your screen should look like Figure 2.5.
- 4 Right-click the name and e-mail in the **From** field at the top of the message and select **Add to Outlook Contacts**.
- 5 Click **Save & Close**. Close the message. In the **Navigation** pane, click **Contacts**.
- 6 **CHECK** Your screen should look like Figure 2.6.

Continue to the next exercise.

### You Should Know

To save a contact without opening the message, right-click the e-mail address in the **Preview** pane and select **Add to Outlook Contacts**.

### Troubleshooter

If **Add to Outlook Contacts** is not in the drop-down menu, click off the menu and position the pointer again.

## EXERCISE 2-3

### Create a Contact from a Message Header

Outlook makes it easy to create new contacts from the e-mail interactions you have. One of the simplest ways to create and save a new contact is from the **header** at the top of e-mail messages you have received.

FIGURE 2.5 Message with contact information

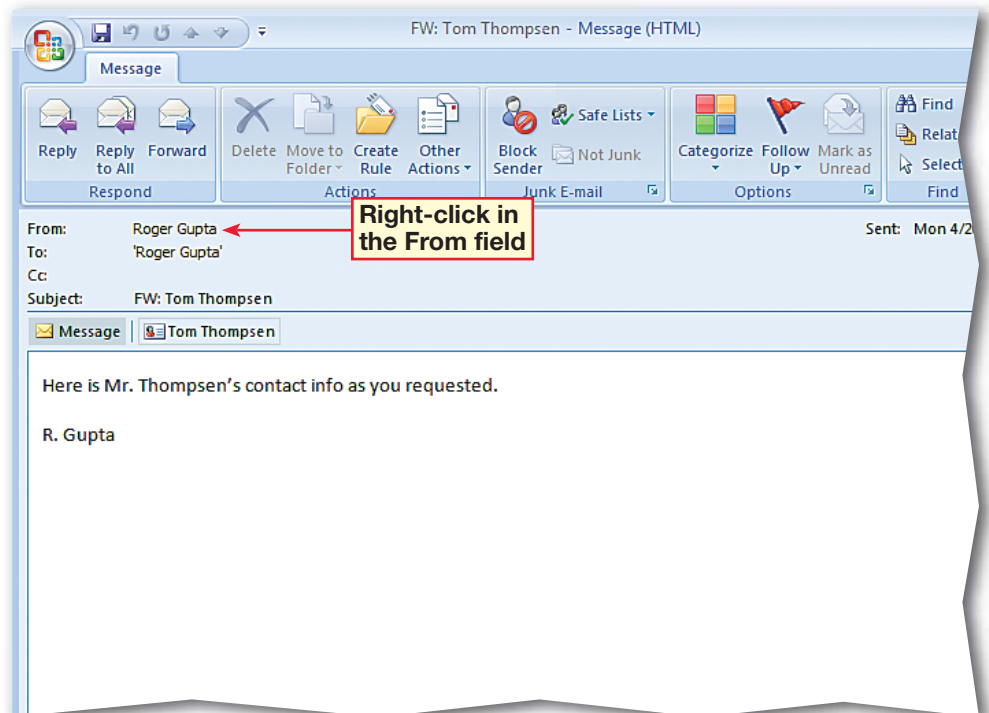
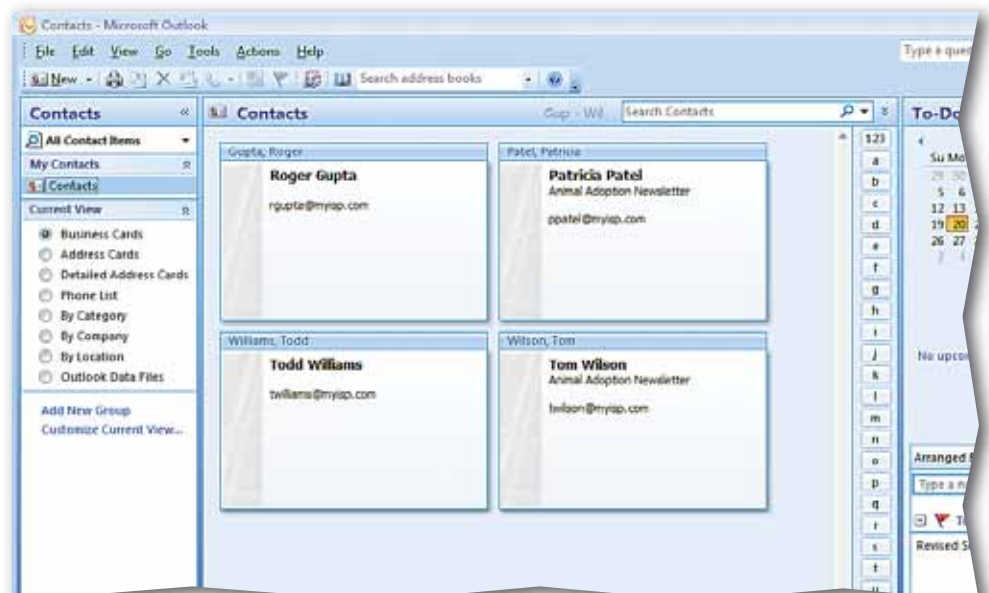


FIGURE 2.6 Contacts with new contact added from e-mail header



## Step-By-Step

- 1 In the **Contacts** pane, double-click the address card of your assigned classmate.
- 2 In the **Company** box, key: **Photo Inc.**
- 3 Under **Phone numbers**, in the **Business** box, key: **(818) 555-5555**. Press **ENTER**.
- 4 In the **Business Fax** box, key: **(818) 555-1221**. Press **ENTER**.
- 5 **CHECK** Your screen should look like Figure 2.7.
- 6 Click in the **Notes** pane of the contact. Key: **Has a good eye for household pets.**
- 7 Click **Save & Close**.
- 8 **CHECK** Your screen should look like Figure 2.8.

Continue to the next exercise.

### You Should Know

You can store more than one phone number in each phone number category. You can also store more than one address for each contact. Click the down arrows next to the phone number and address boxes to give the boxes different names.

## EXERCISE 2-4 Modify Contact Information

You can **update** your contact cards as you learn more about a contact. For example, you can add information such as phone numbers and fax numbers. You also can add information such as the contact's birthday, nickname, or job title.

FIGURE 2.7 Contact with phone numbers added

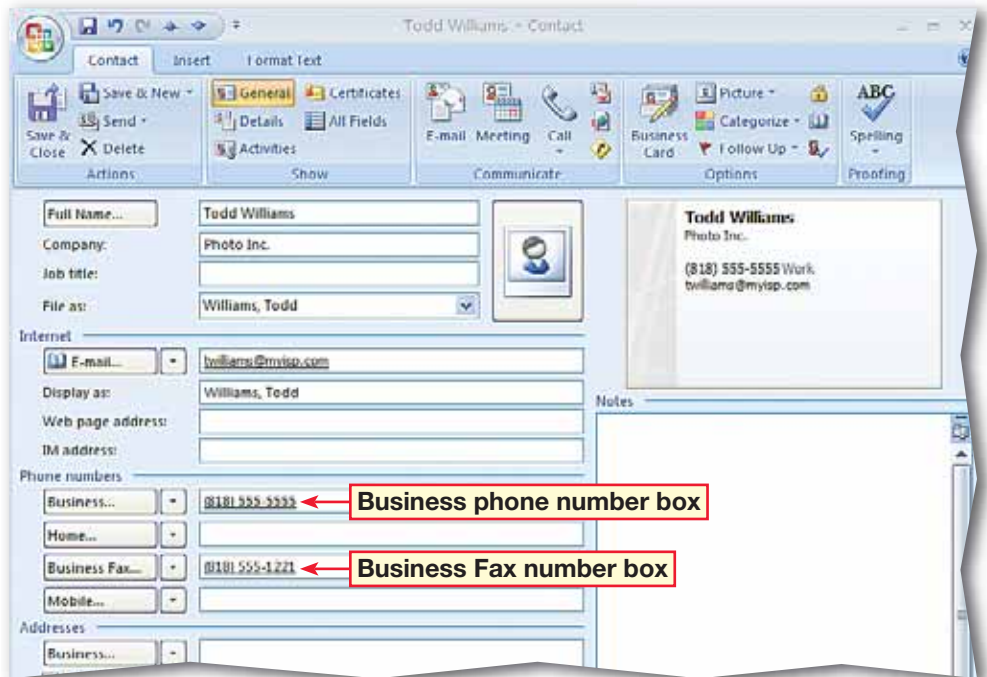
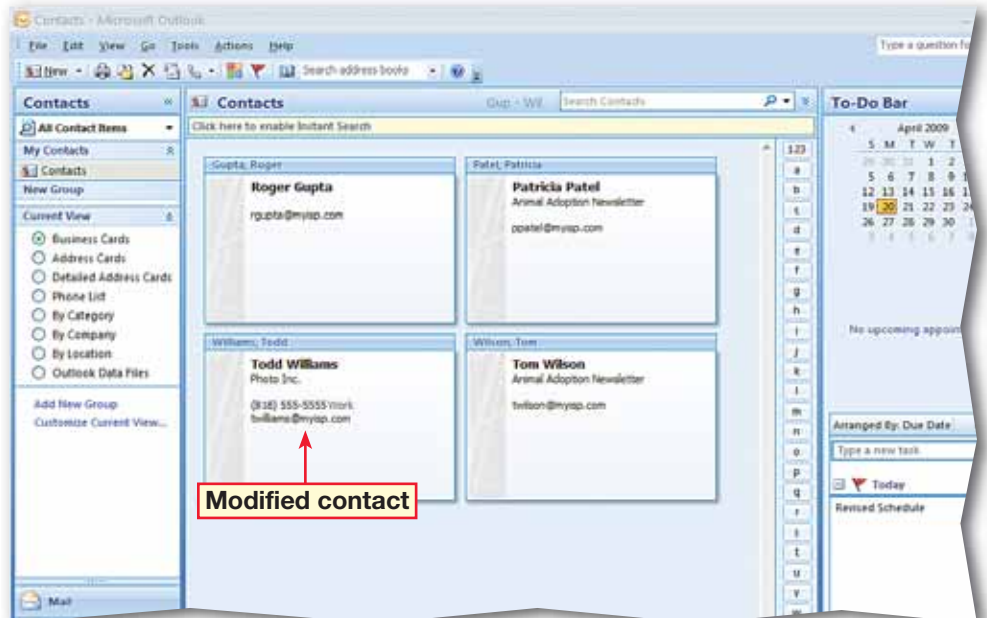


FIGURE 2.8 Modified contact



## Step-By-Step

- 1 In the **Navigation** pane, click **Mail**.
- 2 Open the **FW: Tom Thompsen** e-mail.
- 3 **CHECK** Your screen should look like Figure 2.9.
- 4 Right-click the **Tom Thompsen** attachment in the message header and click **Open**.
- 5 In the open contact record, click **Save & Close**.
- 6 Close the **FW: Tom Thompsen** e-mail.
- 7 In the **Navigation** pane, click **Contacts**.
- 8 **CHECK** Your screen should look like Figure 2.10.

Continue to the next exercise.

### Academic Skills

Editing is a vital skill in keeping contacts organized. One misplaced character might mean that you can no longer get hold of a key player in a crucial business deal. Always edit your contact information, especially e-mail addresses and phone numbers, carefully.

## EXERCISE 2-5

### Save a Contact Received As a Contact Record

You can easily share your contact information with other people by sending a **contact record**. Contact information can also be e-mailed to you from another sender so that you can save the information as a record in your Contacts list.

FIGURE 2.9 E-mailed contact

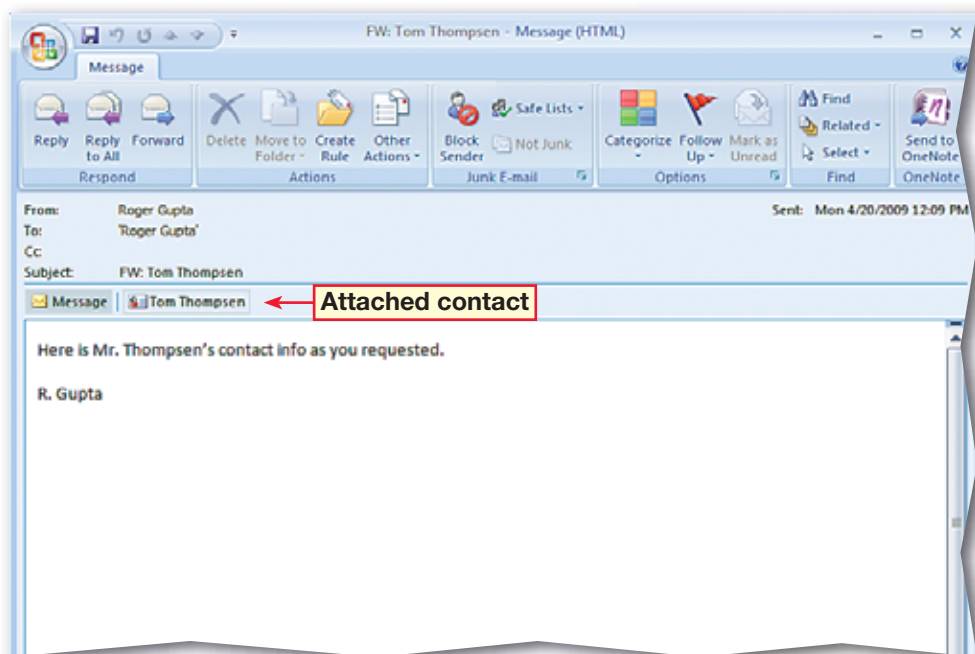
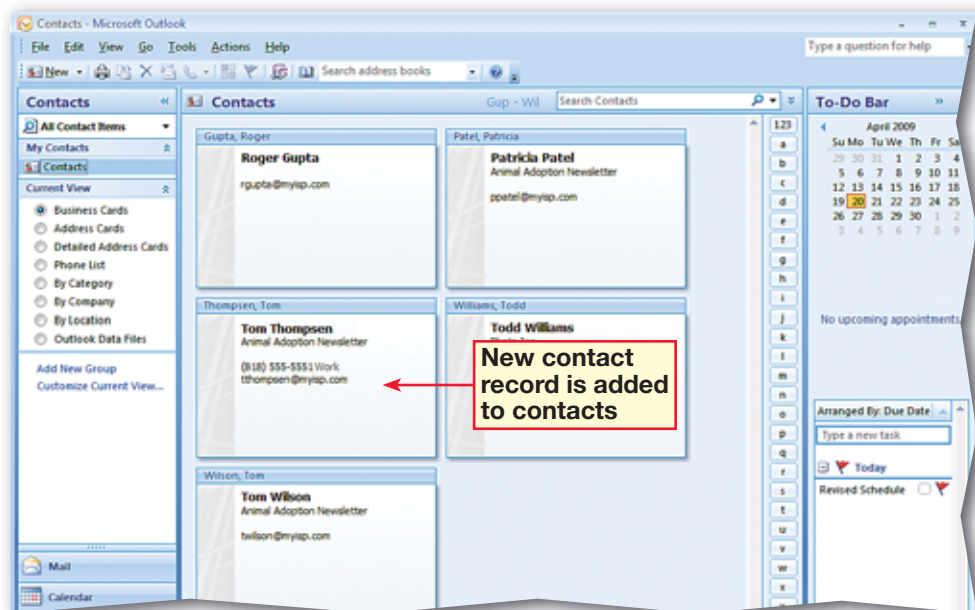


FIGURE 2.10 New contact record



## Step-By-Step

- 1 In the **Contacts** pane, under **Current View**, select **Business Cards**, if necessary.
- 2 Double-click **Tom Thompsen** to open it.
- 3 Under the **Internet** heading in the **IM address** box, key: **Tommy**. Press **ENTER**.
- 4 **CHECK** Your screen should look like Figure 2.11.
- 5 Choose **Contact > Options > Business Card**.
- 6 In the **Edit Business Card** dialog box, in the **Fields** box, select **Full Name**. Click the **down arrow** twice.
- 7 In the **Fields** box, select **E-mail** and click **Remove**.
- 8 **CHECK** Your screen should look like Figure 2.12.

*Continued on next page.*

### Shortcuts

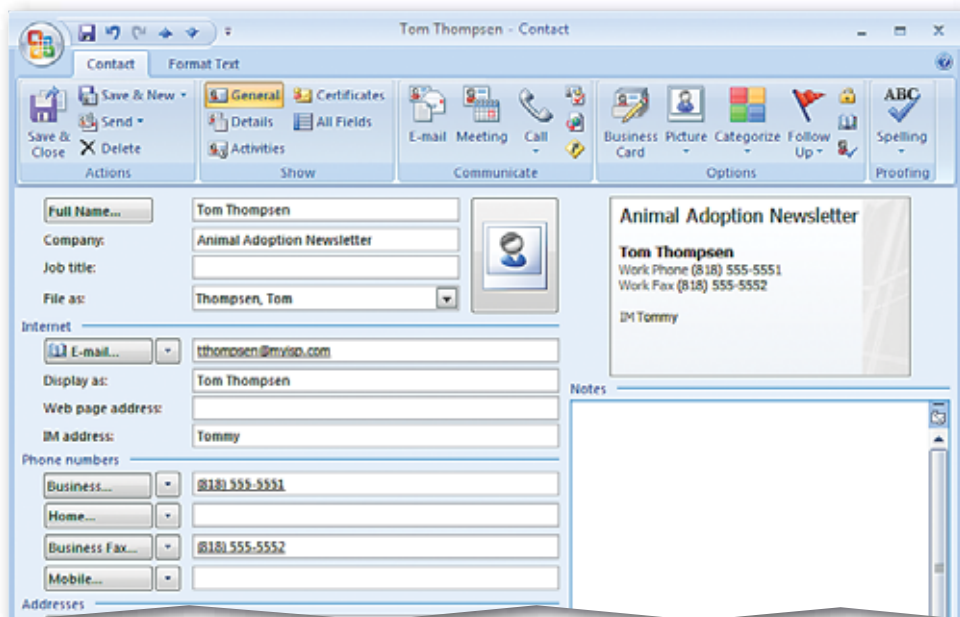
You can also open the **Edit Business Card** dialog box by double-clicking the business card image when the contact record is open.

## EXERCISE 2-6

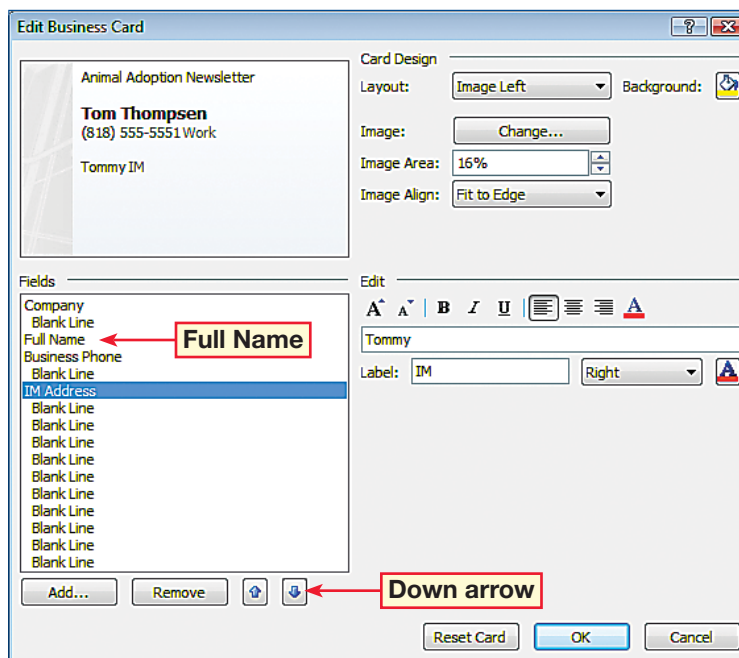
### Edit an Electronic Business Card

The **Electronic Business Card** is a graphic summary of the contact's information. You can edit the information that appears on the business card or change the **format** of the card itself. Any changes you make to the information in the card are reflected in the contact record.

**FIGURE 2.11** Business Card IM name



**FIGURE 2.12** Edit Business Card dialog box





## Step-By-Step

- 9 In the **Fields** box, select **Business Phone**. Under **Edit**, click in the **Label** box after **Work** and key: **Phone**. Click the drop-down arrow next to the box and select **Left**.
- 10 Under the **Fields** box, click **Add** and choose **Phone>Business Fax**.
- 11 Click the **No Label** drop-down arrow and select **Left**. Click in the **Label** box and key: **Work Fax**.
- 12 In the **Fields** box, click **IM Address**. Click the **No Label** drop-down arrow and select **Left**.
- 13 Under **Card Design**, click the **Layout** drop-down arrow and select **Image Right**.
- 14 In the **Fields** box, click **Company**. Under **Edit**, click the **Increase Font Size** button four times.
- 15 **CHECK** Your screen should look like Figure 2.13. Click **OK**.
- 16 Click **Save & Close**.
- 17 **CHECK** Your screen should look like Figure 2.14.

➔ Continue to the next exercise.

## EXERCISE 2-6 (Continued)

### Edit an Electronic Business Card

FIGURE 2.13 Edited Business Card

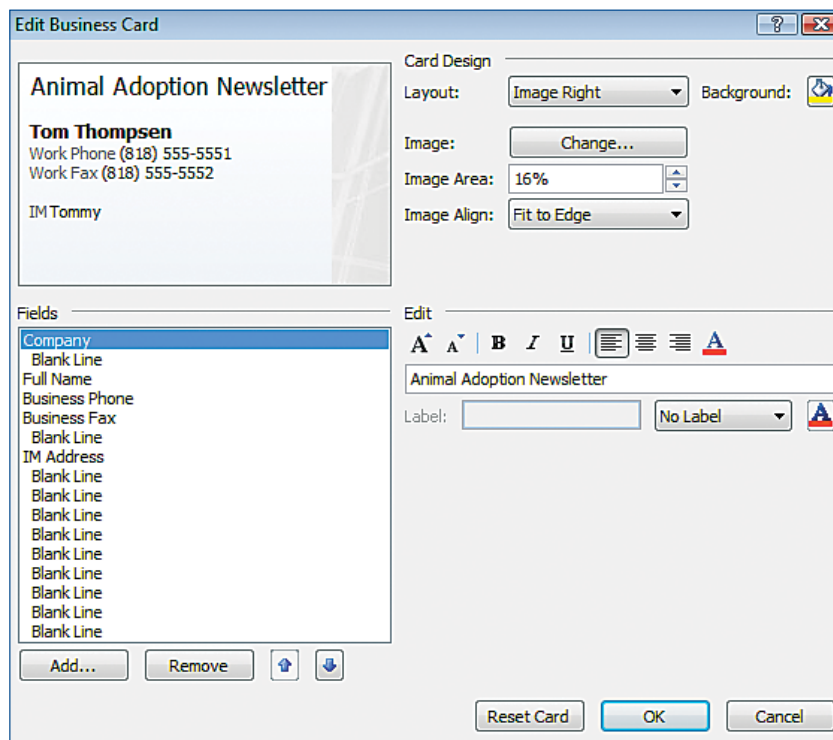
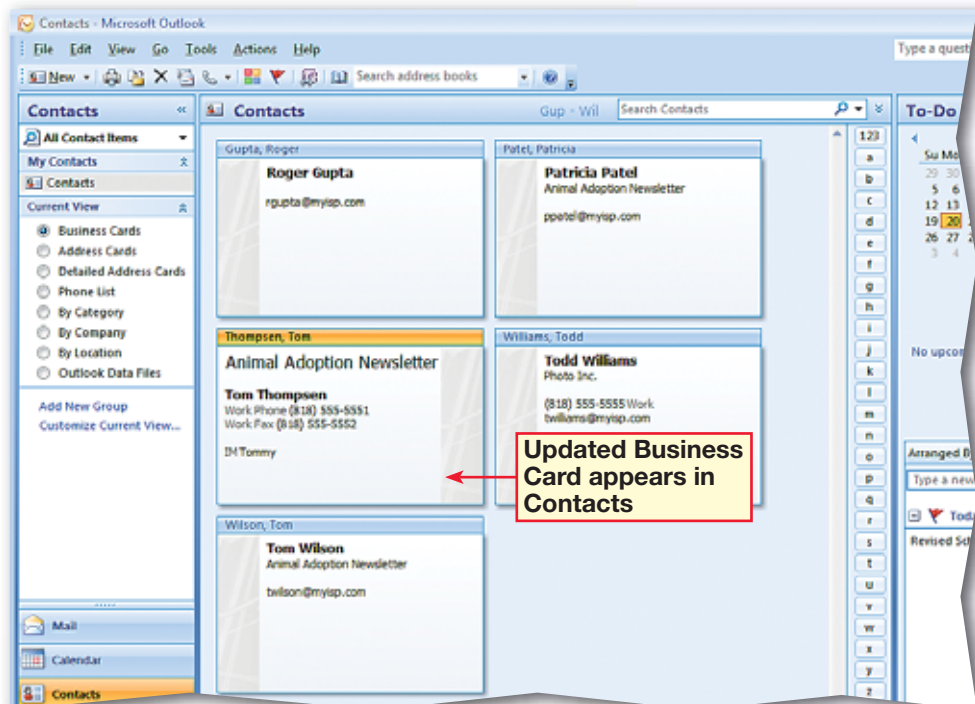


FIGURE 2.14 Edited Business Card in Contacts



## Step-By-Step

**1** In the **Contacts** pane, right-click the **Tom Thompsen** business card and select **Send as Business Card** (see Figure 2.15).

**2** In the **To** box, key the e-mail address of the classmate assigned by your teacher.

**3** In the **Subject** box, key: **New Staffer**.

**4** **! CHECK** Your screen should look like Figure 2.16.

**5** Click **Send** .

 Continue to the next exercise.

### You Should Know

The quickest way to send an e-mail from an open contact record is to choose **Contact > Communicate > E-mail**.

### Tech Tip

Electronic Business Cards are a quick way to add people to your contacts list. Once a person is a contact, Outlook will remember them.

## EXERCISE 2-7

### Send an Electronic Business Card

Electronic Business Cards can be a very useful way to **distribute**, or give out, contact information without having to send the entire contact record. The cards also can **maintain**, or keep up, a professional appearance for the contact you are sharing.

FIGURE 2.15 Business card in Contacts

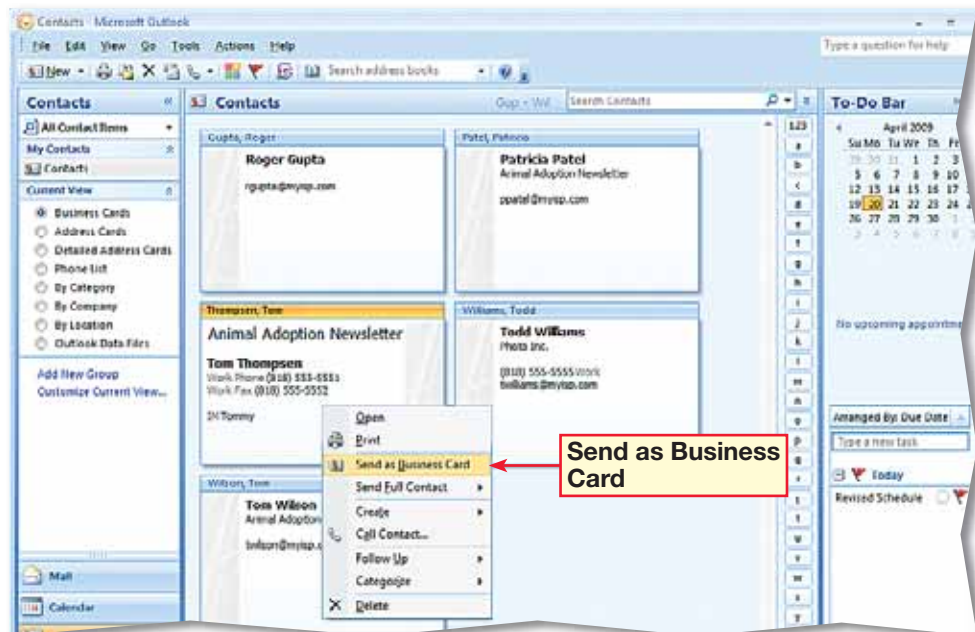
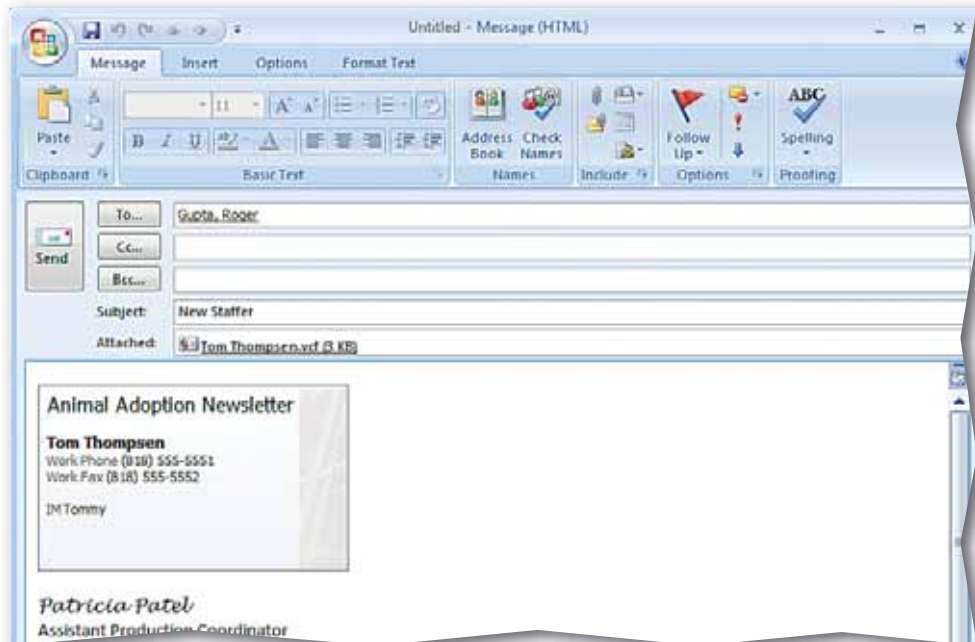


FIGURE 2.16 E-mail with business card



## Step-By-Step

- 1 In the **Navigation** pane, click **Mail**.
- 2 Click the **Inbox** folder and open the **Typographer** message.
- 3 **CHECK** Your screen should look like Figure 2.17.
- 4 Right-click the business card in the body of the e-mail and click **Add to Outlook Contacts**.
- 5 Click **Save & Close**.
- 6 Close the message. In the **Navigation** pane, click **Contacts**.
- 7 **CHECK** Your screen should look like Figure 2.18.

Continue to the next exercise.

### You Should Know

You can include more than one Electronic Business Card in a message.

## EXERCISE 2-8 Create a Contact from an Electronic Business Card



Just as you can save contact information e-mailed to you as a contact record, you can use an Electronic Business Card that has been mailed to you to create a new contact record.

FIGURE 2.17 E-mail message containing business card

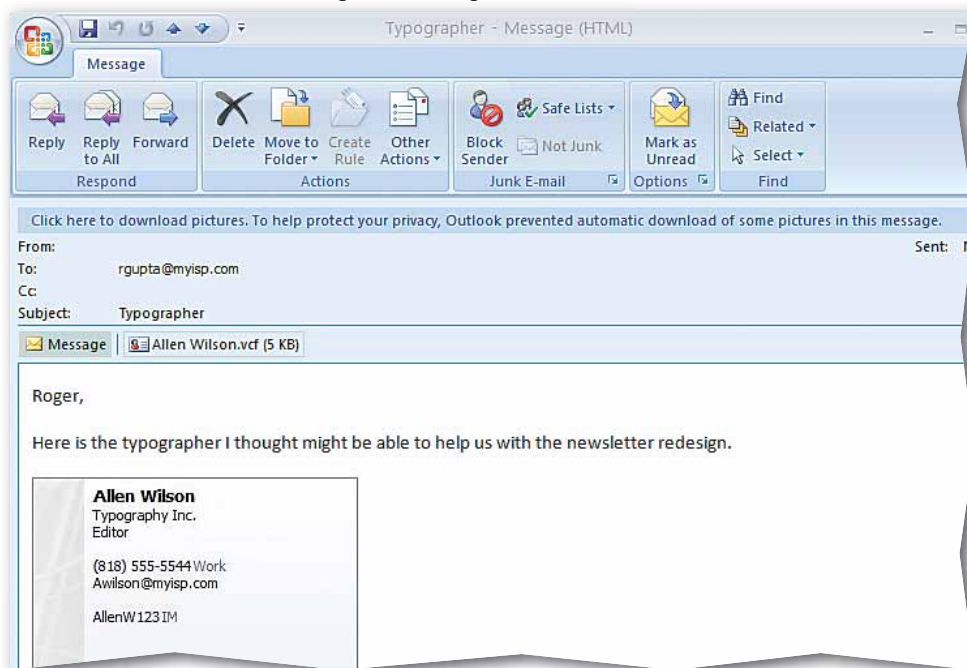
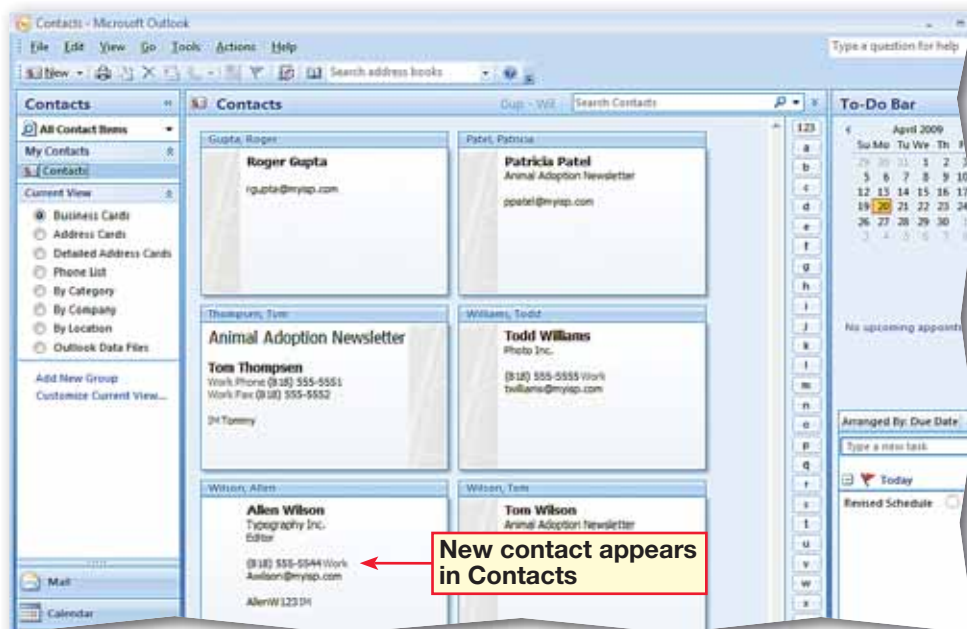




FIGURE 2.18 Business card added as new contact



## Step-By-Step

- 1 Click **New Contact** .
- 2 In the **Full Name** box, key your name.
- 3 In the **E-mail** box, key your e-mail address.
- 4 In the company name box, key: **Animal Adoption Newsletter**.
- 5 **CHECK** Your screen should look similar to Figure 2.19.
- 6 Click **Save & Close** .
- 7 In the **Navigation** pane, click **Mail**.
- 8 Click **New Mail Message** .
- 9 Choose **Insert>Include>Signature** and select **Signatures**.
- 10 **CHECK** Your screen should look similar to Figure 2.20.

 *Continued on next page.*

### Tech Tip

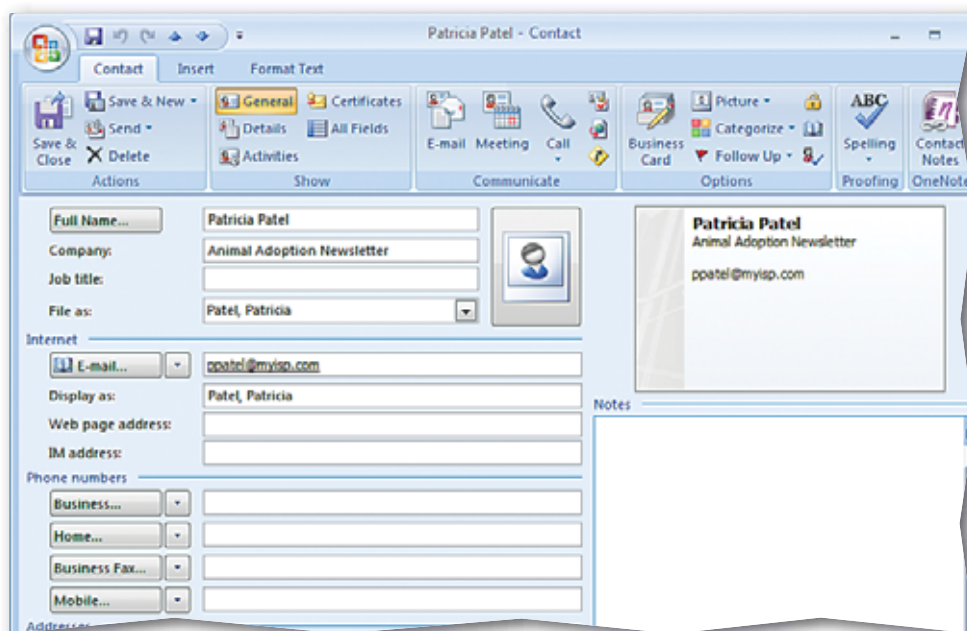
If you send an Electronic Business Card in a message to someone who is using an earlier version of Outlook, the recipient must open the .vcf file to save the information to his or her contacts list.

## EXERCISE 2-9

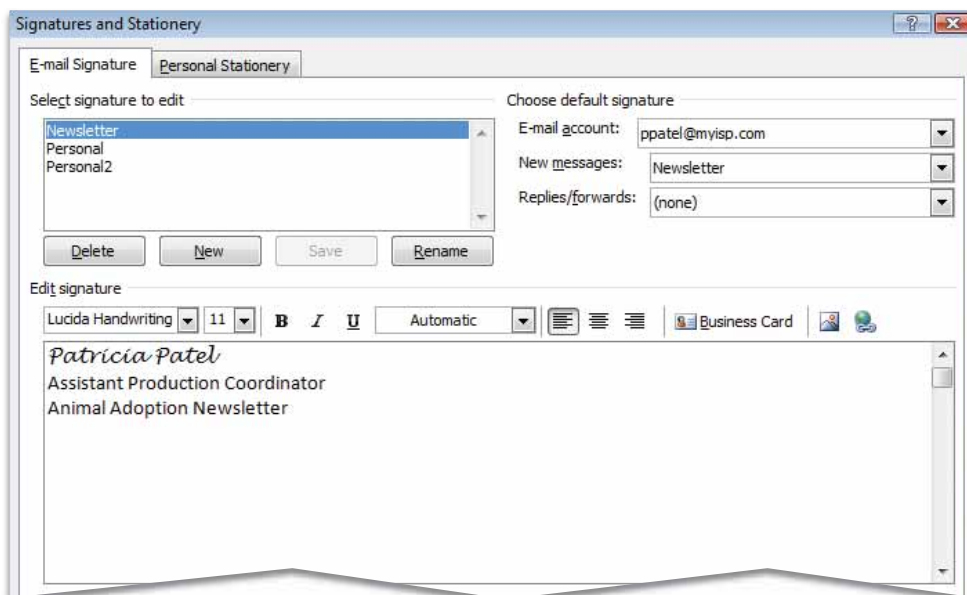
### Create a Signature Using an Electronic Business Card

In the previous lesson, you set up a signature for your e-mail messages in order to make your communications look more professional and to add vital contact information to your messages. You can also use an Electronic Business Card as your e-mail signature.



**FIGURE 2.19** Your business card



**FIGURE 2.20** Signatures and Stationery dialog box



## Step-By-Step

- 11 In the **Signatures and Stationery** dialog box click **New**.
- 12 In the **New Signature** name box, key: **Business Card**. Click **OK**.
- 13 Under **Edit signature**, click **Insert Business Card** .
- 14 **CHECK** Your screen should look like Figure 2.21.
- 15 Select your business card from the list and click **OK**.
- 16 Click **OK** again.
- 17 Close the message without saving changes.
- 18 Click **New Mail Message** .
- 19 Choose **Insert>Include>Insert Business Card** .
- 20 **CHECK** Your screen should look like Figure 2.22.
- 21 With your teacher's permission, send the message to your teacher's e-mail.
- 22 Exit Outlook.

## EXERCISE 2-9 (Continued) Create a Signature Using an Electronic Business Card



FIGURE 2.21 Insert Business Card dialog box

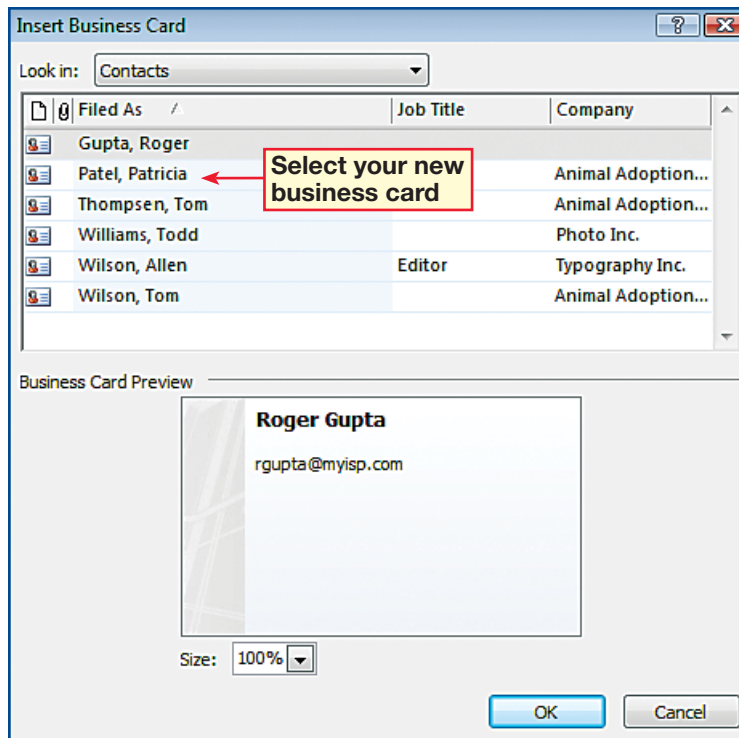
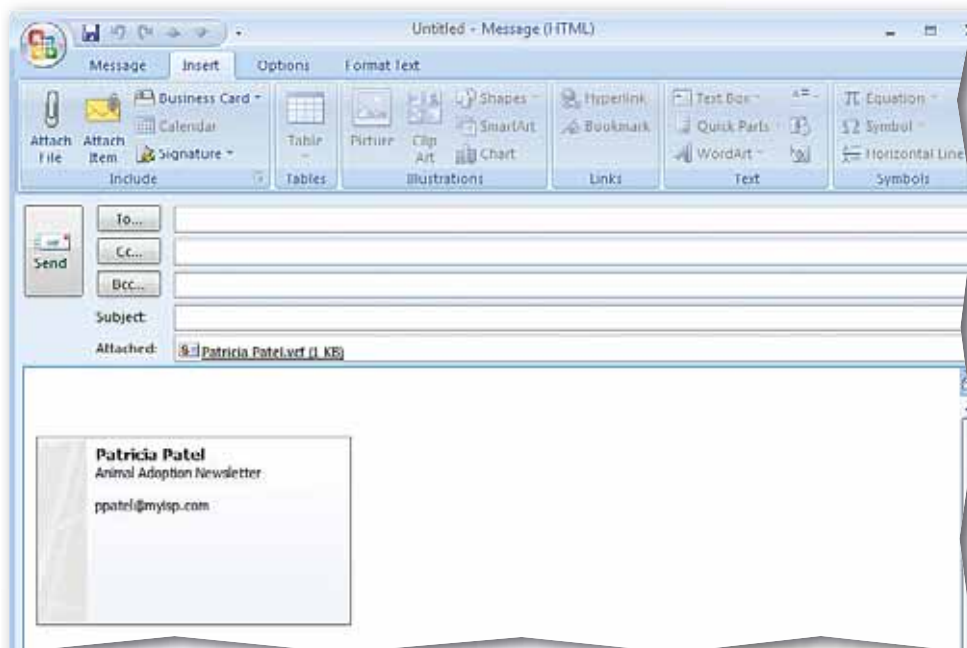


FIGURE 2.22 Message with card as signature





## Vocabulary

### Key Terms

contact

contact record

Electronic Business Card

format

header

update

### Academic Vocabulary

create

distribute

maintain

### Review Vocabulary

Complete the following statements on a separate piece of paper. Choose from the Vocabulary list on the left to complete the statements.

1. If contact information changes you can \_\_\_\_\_ the record any time. (p. 42)
2. Increasing the font size is one way to \_\_\_\_\_ the look of your electronic signature. (p. 44)
3. The information in the top of an e-mail message window is called the \_\_\_\_\_. (p. 41)
4. You can \_\_\_\_\_ Electronic Business Cards much like actual business cards. (p. 46)
5. The complete set of information for a contact is contained in the \_\_\_\_\_. (p. 43)

### Vocabulary Activity

6. Use Contacts to create a new twist on traditional flash cards. Interview three classmates to get their contact information and add them to your contacts. Using the Vocabulary list, send each contact an e-mail that contains one vocabulary word. Request that your contacts respond with a definition. Then:
  - Identify the word and key the definition into the **Notes** box for each contact record.
  - Choose **Contact>Actions>Send** to send your teacher one classmate's contact record as a business card.

### Review Key Concepts

Answer the following questions on a separate piece of paper.



7. How do you save an e-mail address as a contact without opening the message? (p. 41)
 

A. Right-click the message in the Inbox pane and select Save As Outlook Contact	C. Right-click the e-mail address in the Preview pane and select Add to Outlook Contacts
B. In the main menu, click the Add to Outlook Contacts	D. All of the above
8. What can you do with Electronic Business Cards? (pp. 46, 47, 48)
 

A. Send them as attachments	C. Save information from them
B. Use them as a signature	D. All of the above
9. What is the quickest way to send an e-mail from a contact record? (p. 46)
 

A. Contact>Actions>Send	C. Contact>Communicate>E-mail
B. Contact>Actions>Save & New	D. Format Text>Actions>Send

## Step-By-Step

- 1 Start Outlook.
- 2 In the **Navigation** pane, click **Contacts**.
- 3 Click **New Contact** .
- 4 In the **Full Name** box, key the name of a classmate assigned by your teacher.
- 5 In the **E-mail** box, key the e-mail address of the classmate assigned by your teacher.
- 6 **CHECK** Your screen should look like Figure 2.23.
- 7 Click **Save & Close** .
- 8 **CHECK** Your screen should look like Figure 2.24.
- 9 Exit Outlook.

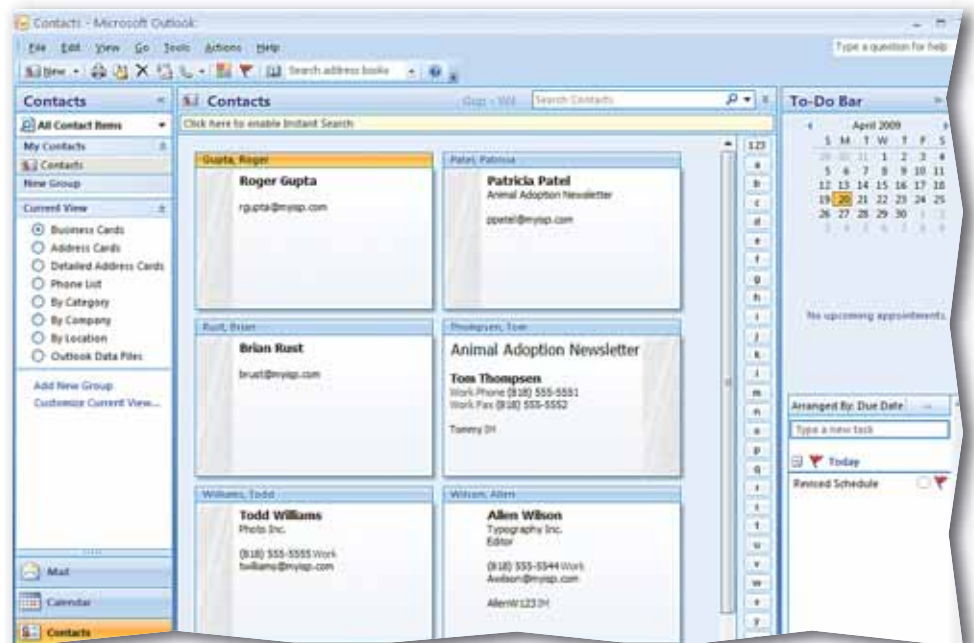
## 1. Create a Contact

Follow the steps to complete the activity.

**FIGURE 2.23** New contact information



**FIGURE 2.24** New contact in contact list



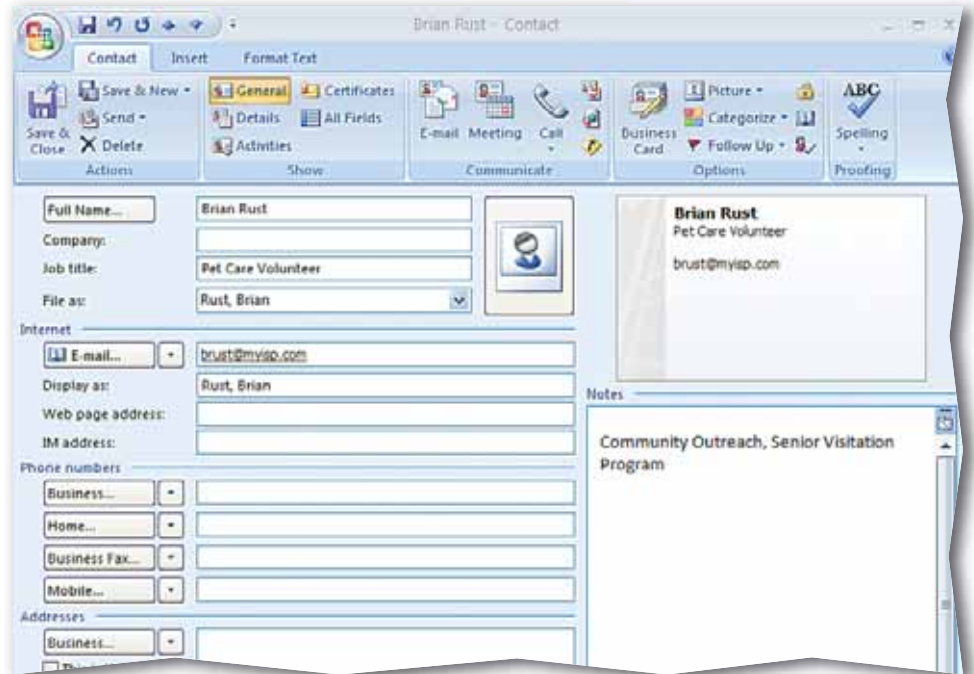
## Step-By-Step

- 1 In the **Contacts** pane, double-click the address card of your assigned classmate.
- 2 In the **Job title** box, key: **Pet Care Volunteer**.
- 3 Under the **Notes** heading in the box, key: **Community Outreach, Senior Visitation Program**.
- 4 **CHECK** Your screen should look like Figure 2.25.
- 5 Click **Save & Close**.
- 6 **CHECK** Your screen should look like Figure 2.26.
- 7 Exit Outlook.

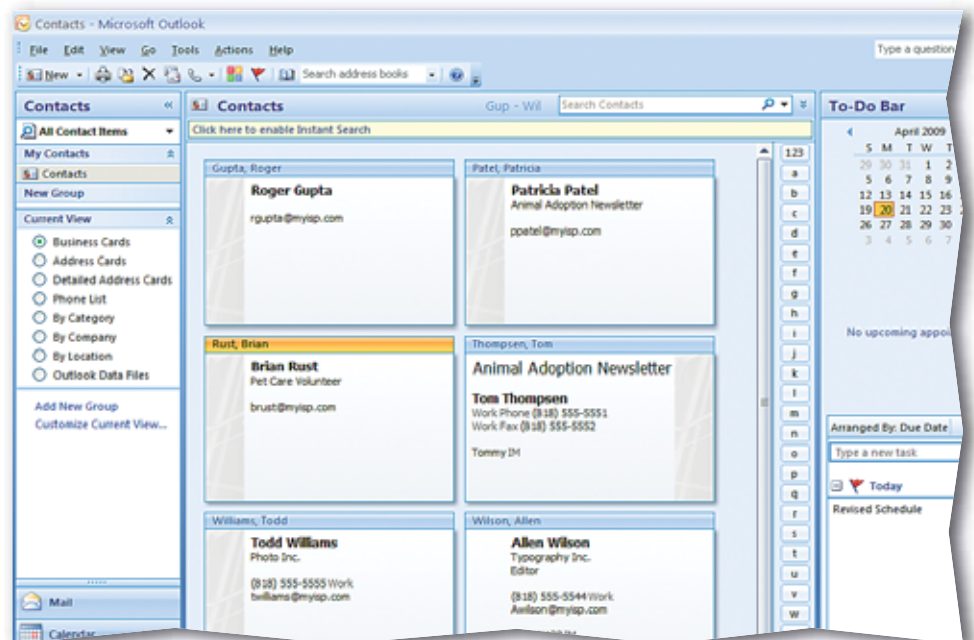
## 2. Modify Contact Information

Follow the steps to complete the activity.

**FIGURE 2.25** Updated contact information



**FIGURE 2.26** Modified Business Card





## Step-By-Step

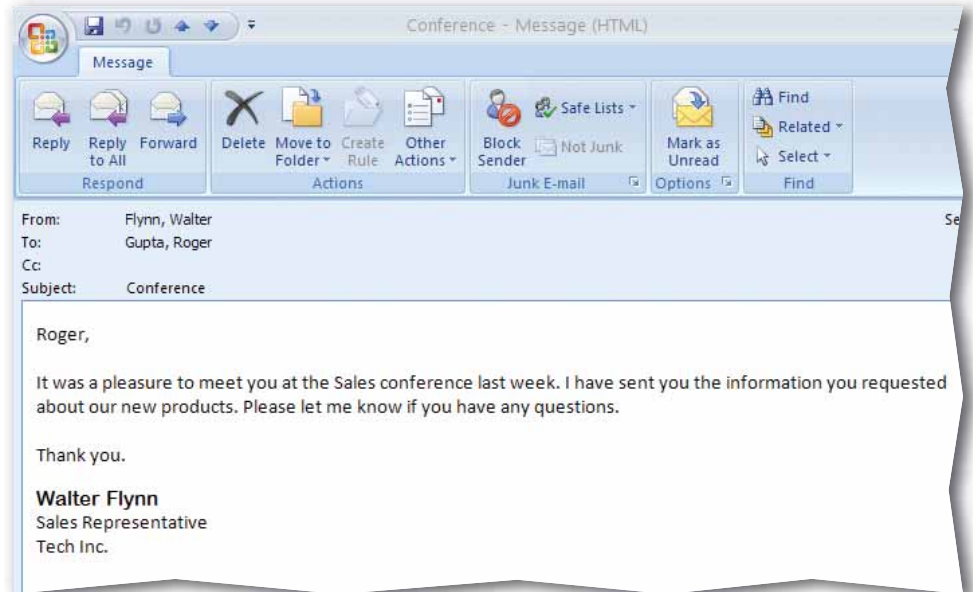
- 1 In the **Navigation** pane, click **Mail**.
- 2 Click the **Draft** folder and open the **Follow Up** message.
- 3 Highlight the text in the **To** box and key the e-mail address of your assigned classmate. Change the recipient and sender names. Click **Send**.
- 4 Double-click the **Follow Up** e-mail in your **Inbox** to open it.
- 5 **CHECK** Your screen should look similar to Figure 2.27.
- 6 Right-click your classmate's e-mail address in the **From** field and select **Add to Outlook Contacts**.
- 7 Click **Save & Close**. In the **Navigation** pane, click **Contacts**.
- 8 **CHECK** Your screen should look similar to Figure 2.28. Exit Outlook.

## 3. Create a Contact from a Message Header

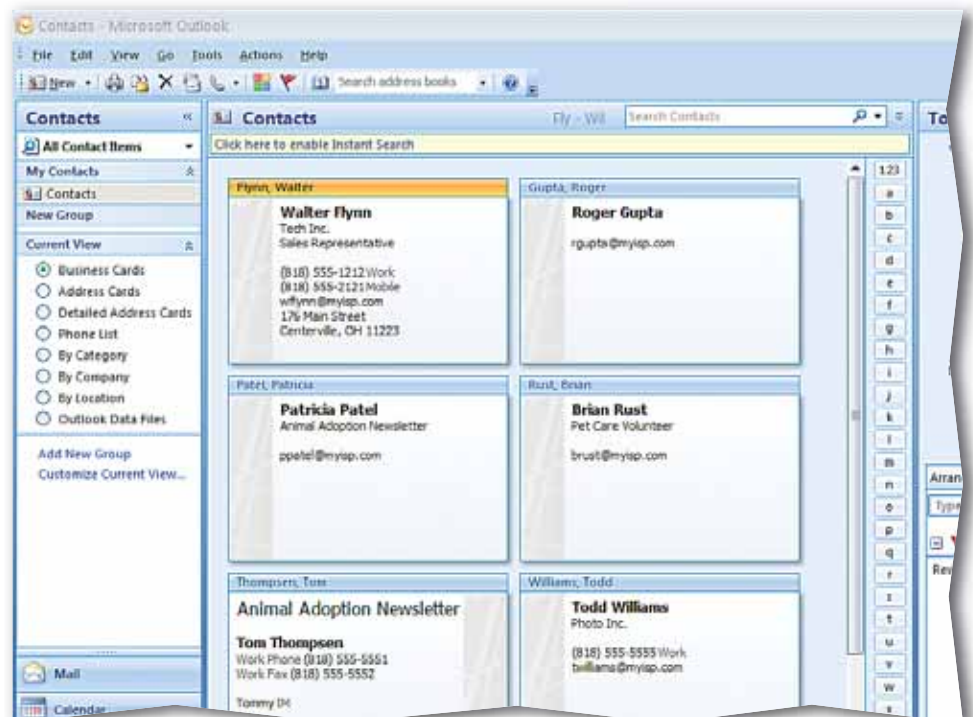


Follow the steps to complete the activity.

**FIGURE 2.27** Message with contact information



**FIGURE 2.28** Contacts with new contact added from e-mail header



## Step-By-Step

- 1 Click **Contacts**. In the **Contacts** pane, select **Business Cards**, if necessary.
- 2 Open the **Tom Wilson** card. Choose **Contact > Options > Business Card**.
- 3 **CHECK** Your screen should look like Figure 2.29.
- 4 In the **Fields** box, select **Company**. Click the **down arrow**.
- 5 Select **Business Phone**. Under **Edit**, click in the empty box and key: **(818) 555-3333**.
- 6 Under the **Fields** box, click **Company**. Under **Edit**, click **Font Color** and select **Green**. Click **OK**.
- 7 Click **Increase Font Size** three times. Click **OK**.
- 8 Click **Save & Close**. Scroll down, if necessary.
- 9 **CHECK** Your screen should look similar to Figure 2.30.
- 10 Exit Outlook.

## 4. Edit an Electronic Business Card

You are the human resources manager for your company. One of your contacts has a new business number and you want to modify his record.

FIGURE 2.29 Edit Business Card dialog box

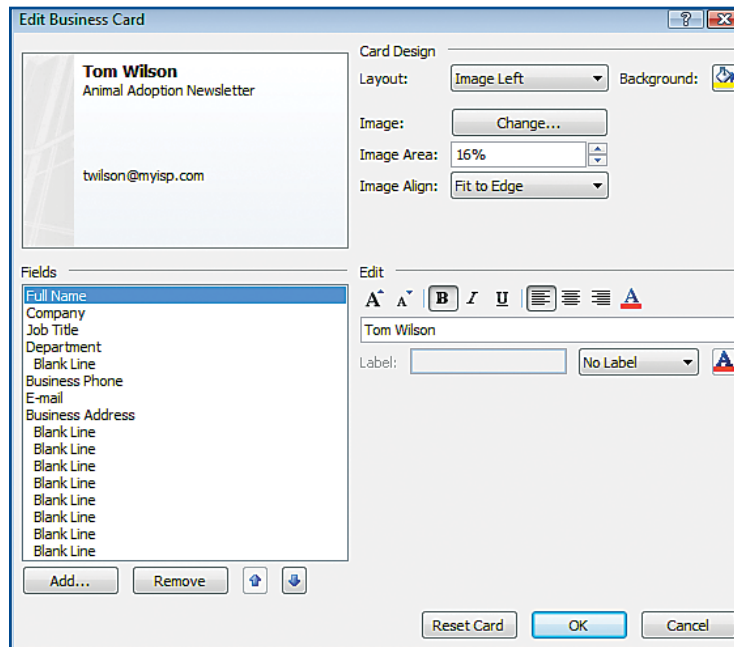
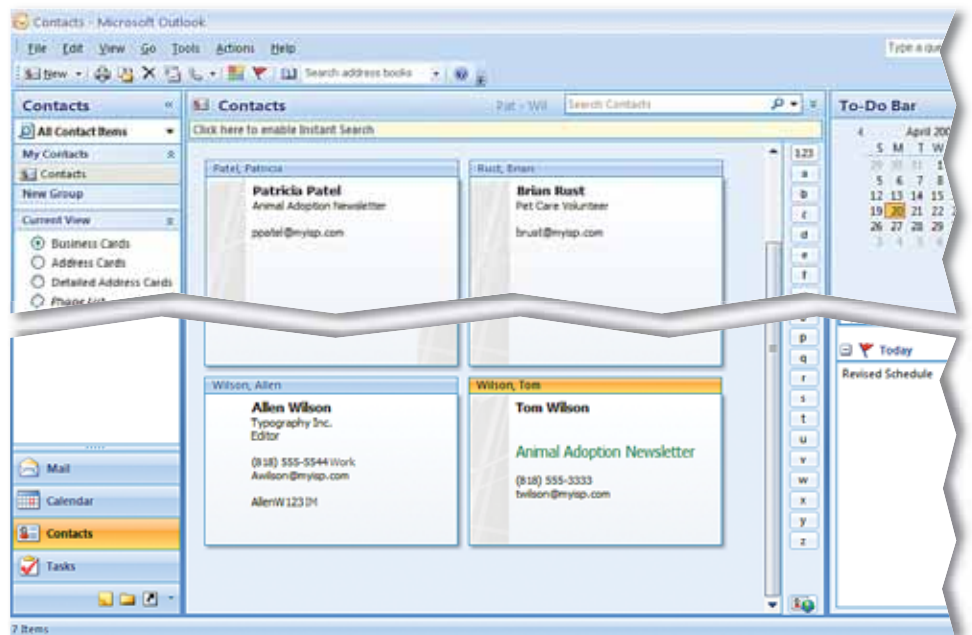


FIGURE 2.30 Edited Business Card in Contacts



## Step-By-Step

- 1 Right-click the **Tom Wilson** business card and select **Send as Business Card** (see Figure 2.31).
- 2 In the **To** box, key the e-mail address of a classmate assigned by your teacher.
- 3 In the **Subject** box, key: **New Staffer**.
- 4 **CHECK** Your screen should look like Figure 2.32.
- 5 Click **Send**.
- 6 Exit Outlook.

## 5. Send an Electronic Business Card

Your supervisor has asked that you send her a copy of the new contact information and has requested that you send it in the form of an Electronic Business Card.

FIGURE 2.31 Business card in Contacts

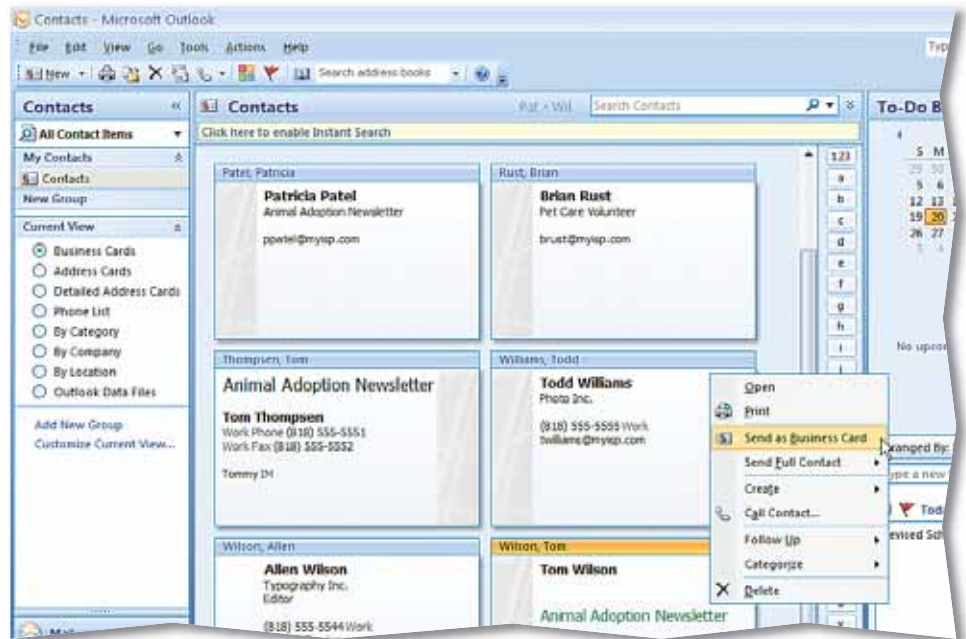
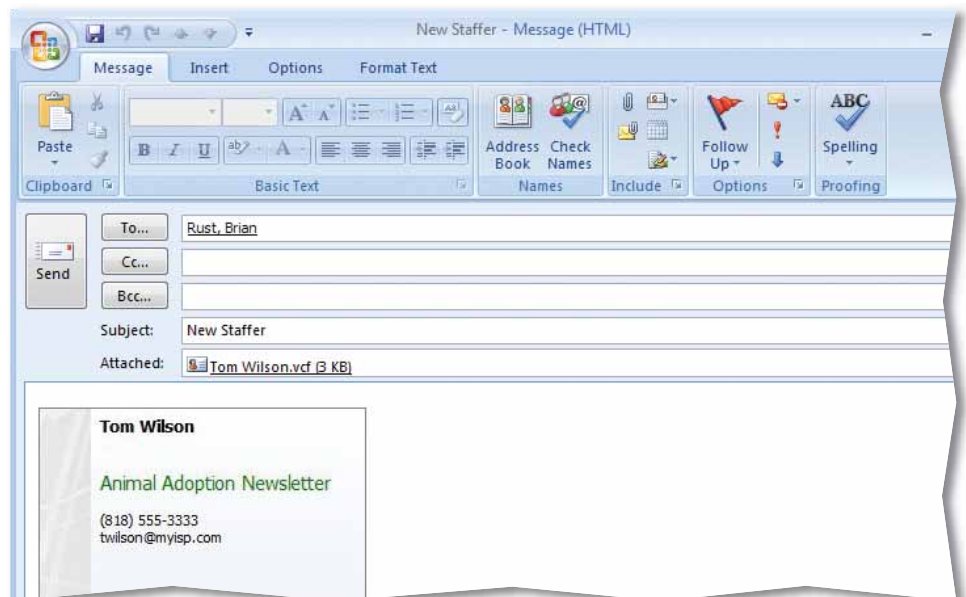


FIGURE 2.32 E-mail with business card



## 6. Beyond the Classroom Activity



**Language Arts: Communicate by E-mail** Your supervisor has requested a list of internal candidates for a new position in your company. You have three candidates selected from your department.

Using what you have learned in this lesson and the previous Outlook lesson:

- Create three Electronic Business Cards for the job candidates.
- Attach the business cards to an e-mail to your supervisor explaining that these are the cards of the three candidates from your department.
- Include a request for follow up.
- Send the e-mail to your teacher.

Save your e-mail as: **o2rev-[your first initial and last name]6**.

## 7. Standards at Work Activity



### Microsoft Certified Application Specialist Correlation

#### Outlook 4.1 *Create and Modify Contacts*

**Keep Track of Contact Information** While at a one-week corporate workshop, you met three people who do work similar to yours for different companies. Create three new contacts and enter the information for these three people. Include each person's:

- Name
- Position
- Company
- Business telephone number
- E-mail address

Save and close your new contacts.

## 8. 21st Century Skills Activity

**Create a Lasting Impression** Communicating effectively means communicating carefully. After meeting colleagues at a workshop, you decide to follow up by sending your own contact information to three people. Create an Electronic Business Card for yourself.

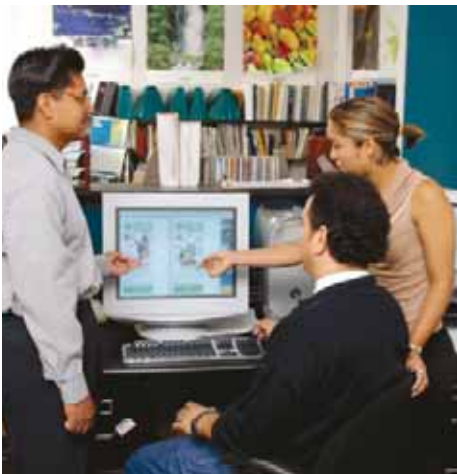
Open a new e-mail and compose a brief message to three people that you met. Add your business card as your signature. Save the message as: **o2rev-[your first initial and last name]8**.

**Before You Begin**

**Organize Contacts** No matter what job you choose, keeping contact information up to date and organized is important for success. In these projects, you will learn how to share, maintain, and organize contacts to gain an edge in the business world.

**Reflect** Once you complete the projects, open a Word document and answer the following questions:

1. Why is it important to update your contacts?
2. How might the efficiency of Outlook's Contacts feature be diminished if its information is not kept up-to-date?

**9. Share Contact Information**

Michael Newman/Photo Edit



**Language Arts: Create Electronic Business Cards** In the previous lesson, you attended a weekend conference on technology. You met three people you wanted to keep in touch with, and you obtained their e-mail addresses.

- Create three new contacts records for these three people and format Electronic Business Cards for them.
- Compose an e-mail, addresses to all three contacts at once, sending them the three cards and one from yourself.

Save the e-mail as: **o2rev-[your first initial and last name]9**.

**10. Update Contacts**

**Language Arts: Modify Contact Records** Your contacts from the conference have moved to different jobs and have sent you their updated information. Modify the information for these three contacts so that:

- One contact has a new business address and phone, but still works for the same company.
- One contact has moved to a different company with a different address, phone, and position.
- One contact has changed his e-mail address and taken on another position in the company in addition to his current job. Create a second contact record based on this contact record for his new position.

Save your new contact information.

**11. Evaluate Accurate Information**

**Language Arts: Write an Essay** How has knowing the right people to contact helped you solve problems in the past? Think of some ways that you used to find the right people to help you in certain situations. How did you know who to contact for help? Write an essay describing how accurate contact information (phone number, address, or e-mail address, etc.) made a difference in solving a problem. Provide at least two examples.

Save your document as: **o2rev-[your first initial and last name]11**. Then, create a new e-mail message with the subject **o2rev11**. In the message, key a brief summary of the essay. Attach the Word document to the e-mail and send the e-mail to your teacher.

## Key Concepts

- Add appointments and events to the Calendar
- Schedule meetings and resources
- Accept, decline, and propose new meeting times
- Update and cancel meeting requests
- Set Calendar options and work with tasks

## Standards

The following standards are covered in this lesson. Refer to pages xxiv and 715 in the Student Edition for a description of the standards listed here.

## ISTE Standards Correlation

## NETS•S

2a, 2b, 2d, 4a, 4b, 5a, 5b, 6a

## Microsoft Certified Application Specialist Standards

## Outlook

2.1, 2.2, 2.3, 2.4, 2.5,  
2.6, 3.1, 3.2



The business world runs on appointments and meetings. In this lesson, you will learn why the Outlook Calendar is a useful tool for scheduling appointments and meetings. You will also use the Calendar to send notices about meetings, to accept and decline meetings, and to propose new times for meetings.

Bonnie Karmali/PhotoEdit

## 21st CENTURY SKILLS

**Manage Your Time** It is often difficult to keep track of all the things you need to do and of all the places you need to be. Setting a realistic schedule can keep you from becoming overscheduled. Try recording all of your activities in a calendar or daily planner. Allow enough time between activities. That way, you have some extra time to spare should an unexpected event occur. Managing your time well can keep the day from becoming a race you can never win! *How can keeping a schedule help you at school?*





### Before You Read

**Take a Nap** It is better to study when you are well-rested and alert. Studying in the same situation as when you are likely to take a test—fully rested and mentally sharp—will help you recall the information you have studied.

### Read To Learn

- Understand how tracking appointments by the day, month, or week can help you budget your time and stay on schedule.
- Make the most of Outlook for scheduling events and inviting attendees.
- Save time by tracking tasks, assignments, and projects with Outlook Task functions.

### Main Idea

Learn to use Outlook's Calendar and Task functions to track appointments and events, as well as to schedule and notify others of events that you organize.

### Vocabulary

#### Key Terms

appointment	meeting request
assign	Overlay Mode
attendee	resources
Calendar	task
delegate	Task list
event	tentative
meeting	

### Academic Vocabulary

These words appear in your reading and on your tests. Make sure you know their meanings.

generate  
mandatory  
priority  
suggest

### Quick Write Activity



**Describe** On a separate sheet of paper, write down three recurring events in school that could be tracked using Outlook's Calendar function. Describe why it is important to keep track of these, and other events, in your life.

### Study Skill

**Reading Skills** Try the SQ3R approach to reading. **Survey**, or look over, the passage before you read it. Ask yourself **questions** that you think will be answered. **Read** the text. Then **recite**, or go over in your mind, what you read. Finally, **review** the text.

### Academic Standards



#### English Language Arts

**NCTE 3** Use language to accomplish individual purposes.

**NCTE 4** Use written language to communicate effectively.

**NCTE 5** Use different writing process elements to communicate effectively.

## Step-By-Step

- 1 Launch Outlook. In the **Navigation** pane, click **Calendar**.
- 2 On the **Standard** toolbar, click **New Appointment** .
- 3 **CHECK** Your screen should look like Figure 3.1.
- 4 In the **Appointment** dialog box, in the **Subject** box, key: **Project Meeting**.
- 5 Click the **Start time** date drop-down arrow. Choose today's date.
- 6 Click the **Start time** drop-down arrow next to the time. Select **1:00 PM**. Click the **End time** drop-down arrow and select **3:00 PM**.
- 7 Click **Save & Close** .
- 8 Click the **Month** tab at the top of the screen to switch to **Month** view (see Figure 3.2).

 Continued on the next page.

### You Should Know

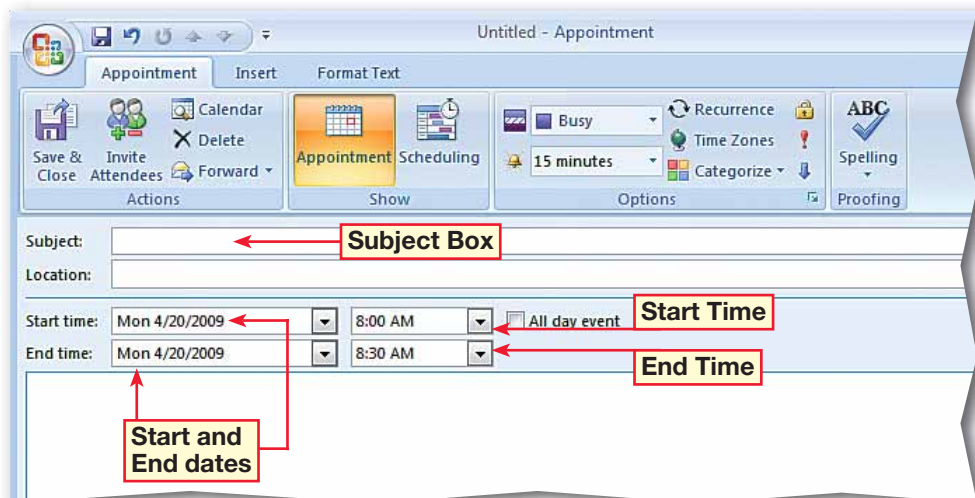
The **Date Navigator** is the small calendar at the top of the **Navigation** pane. Use this calendar to change and view dates quickly.

## EXERCISE 3-1

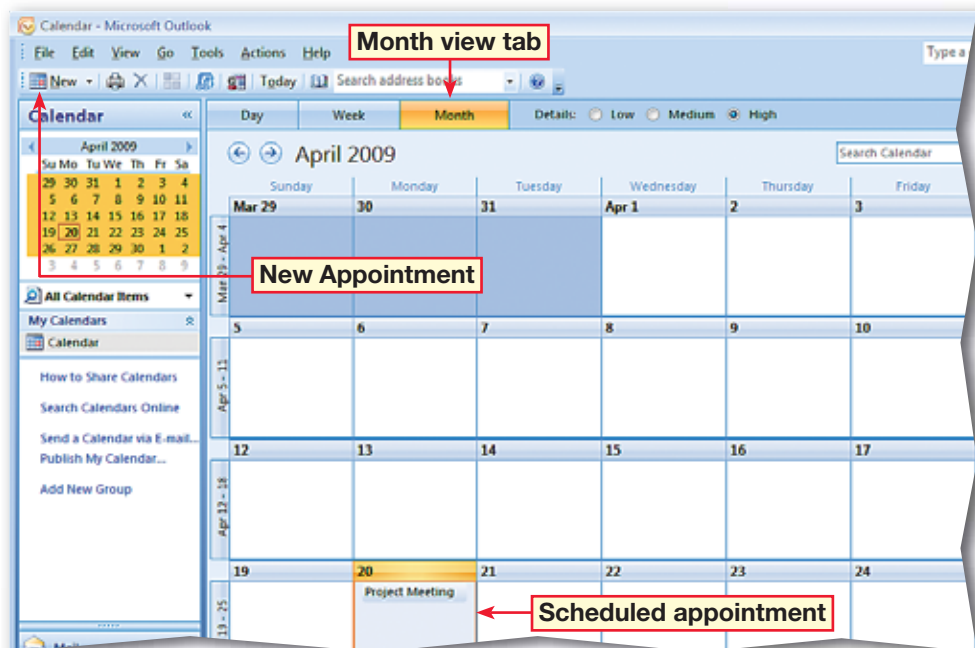
### Add an Appointment to the Calendar

Outlook is a useful tool for scheduling and recording appointments. The **Calendar** is the part of Outlook used to schedule meetings and appointments. An **appointment** is an activity that lasts a fixed amount of time. Use the Appointment dialog box to select when your appointment will start and end. What you key into the Appointment's Subject box is what appears on your Calendar once the appointment is saved and closed. You can also make the appointment a recurring appointment, which means it will occur regularly.

**FIGURE 3.1** Appointment dialog box



**FIGURE 3.2** Scheduled appointment in Calendar Month view





## Step-By-Step

- 9 Double-click the **Project Meeting** appointment to open it.
- 10 Choose **Appointment > Options > Recurrence**.
- 11 **CHECK** Your screen should look like Figure 3.3.
- 12 In the **Appointment Recurrence** dialog box, under **Range of recurrence**, select **End after**. Highlight the text in the box and key: 4.
- 13 Click **OK**. Click **Save & Close**.
- 14 **CHECK** Your screen should look like Figure 3.4.

➔ Continue to the next exercise.

### Troubleshooter

In each Outlook function, the **New** button changes contextually. For example, in the **Tasks** view, the button will create a new task. In the **Calendar** view, the button will create a new appointment.

### Tech Tip

You can use the **Day**, **Week**, and **Month** views to display different calendars.

## EXERCISE 3-1 (Continued) Add an Appointment to the Calendar



FIGURE 3.3 Appointment Recurrence dialog box

Appointment Recurrence

Appointment time

Start: 1:00 PM

End: 3:00 PM

Duration: 2 hours

Recurrence pattern

Daily

Recur every 1 week(s) on:

Weekly

Sunday  Monday  Tuesday  Wednesday

Monthly

Thursday  Friday  Saturday

Yearly

Range of recurrence

Start: Mon 4/20/2009

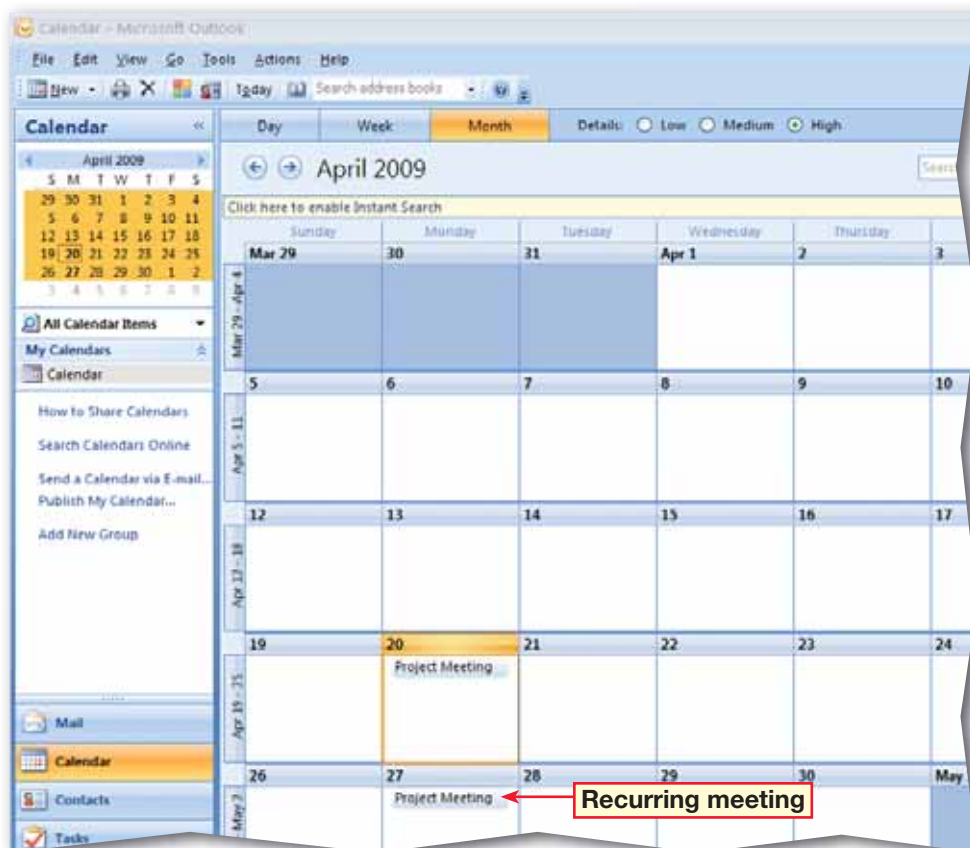
No end date

**End after**  End after: 10 occurrences

End by: Mon 6/22/2009

OK Cancel Remove Recurrence

FIGURE 3.4 Calendar Month view



## Step-By-Step

- 1 In the **Navigation** pane, click **Mail**.
- 2 In your **Inbox**, click once to select the **Development Meeting** e-mail message.
- 3 **CHECK** Your screen should look like Figure 3.5.
- 4 In the **Reading** pane, click and drag the **Development Meeting** attachment onto the Calendar in the **To-Do Bar** pane.
- 5 In the **Navigation** pane, click **Calendar**.
- 6 Open the **Development Meeting** appointment by double-clicking on it.
- 7 **CHECK** Your screen should look like Figure 3.6.
- 8 Choose **Appointment > Options > Private**.
- 9 Click **Save & Close**.

Continue to the next exercise.

### You Should Know

Marking an event *private* makes no difference in the way you view the event. However, other users who share your Outlook folders on a network will not be able to see the details of the event.

## EXERCISE 3-2

### Schedule an Event from an E-mail and Mark an Event as Private

If you are working in an office, chances are you are not the only one scheduling a **meeting**, or appointment to which multiple people are invited. Your coworkers can distribute appointments in e-mail that you can add directly to your Calendar. In addition, to make sure that others do not read the details of events that you would rather keep to yourself, you can mark the **event**, or important occurrence such as a meeting, party, or doctor's appointment, as private to keep the details to yourself.

FIGURE 3.5 Development Meeting message in Preview pane

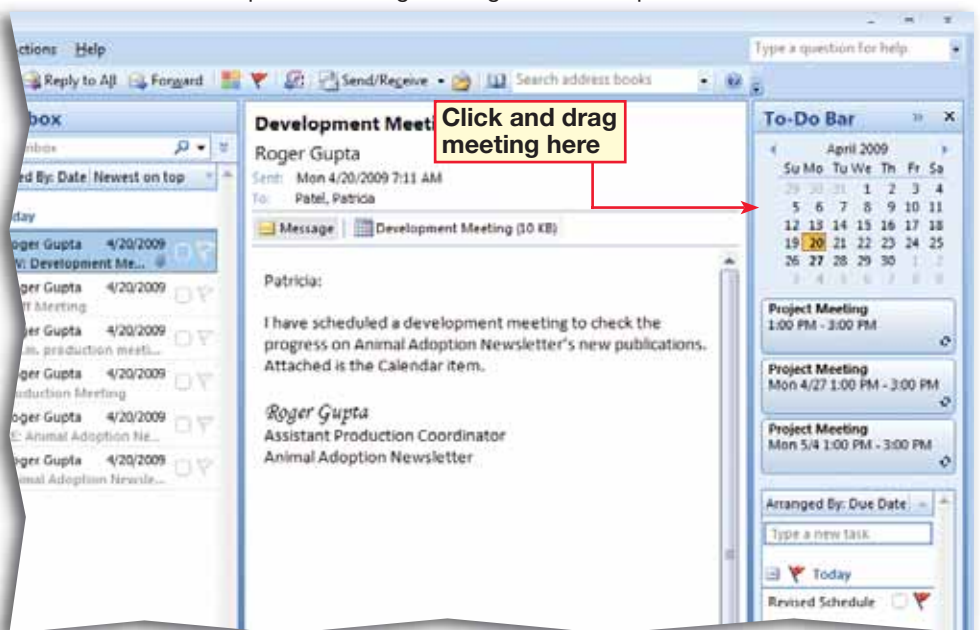
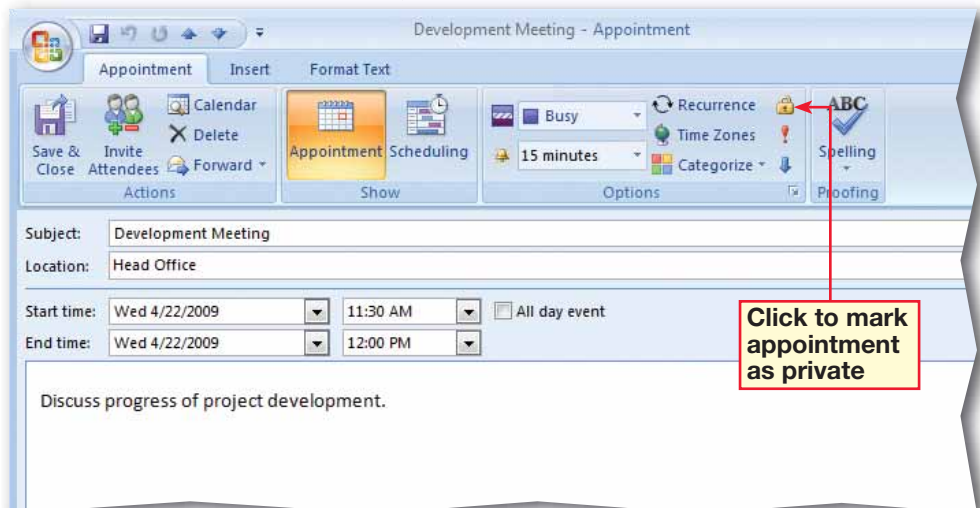


FIGURE 3.6 Development Meeting Appointment window



## Step-By-Step

- 1 In **Calendar** view, make sure the **Development Meeting** is selected.
- 2 On the **Menu** bar, choose **Actions>Plan a Meeting**.
- 3 **CHECK** Your screen should look similar to Figure 3.7.
- 4 In the **Plan a Meeting** dialog box, click **Add Others**. Select **Add from Address Book**.
- 5 In the **Select Attendees and Resources:** **Contacts** dialog box, select **Tom Wilson**.
- 6 Click **OK**.
- 7 Your screen should look like Figure 3.8.
- 8 Click **Close**.

Continued on the next page.

### Shortcuts

To create a new meeting request, press **CTRL** + **SHIFT** + **Q**

## EXERCISE 3-3

### Determine When Attendees Are Available

The people that you invite to a meeting are called **attendees**. When you use Outlook in an office environment, you may be able to see the meetings and events on your coworkers' Calendars. This information can help you **generate**, or create, an event that will not conflict with your coworkers' schedules.

FIGURE 3.7 Plan a Meeting dialog box

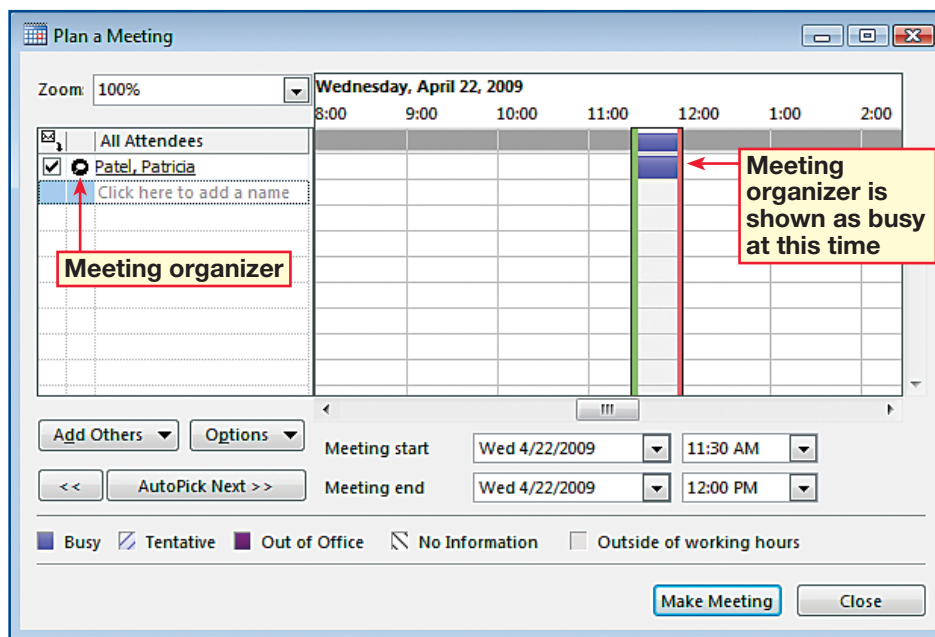
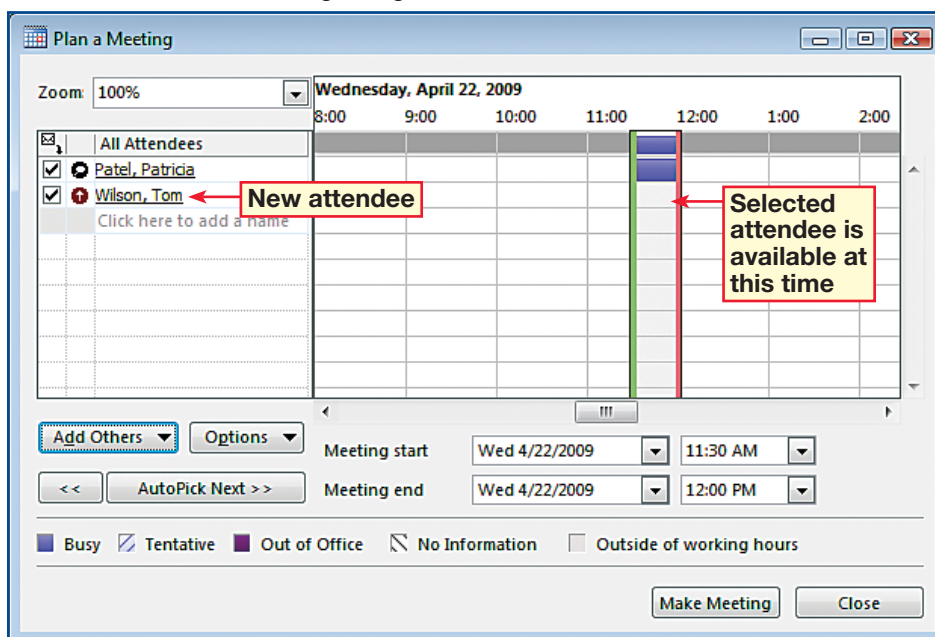




FIGURE 3.8 Plan a Meeting dialog box with attendee added



## Step-By-Step

- 9 Choose **Actions>View Group Schedules** .
- 10 In the **Group Schedules** box, click **New**. Key: **Production**. Click **OK**.
- 11 In the **Production** dialog box, click **Add Others**. Select **Add from Address Book**.
- 12 Double-click the following contacts: **Patricia Patel**, **Tom Wilson**, **Roger Gupta**, **Tom Thompsen**, **Allen Wilson**, and a classmate assigned by your teacher. Click **OK**.
- 13 **CHECK** Your screen should look like Figure 3.9.
- 14 Click **Cancel**.
- 15 Open the **Development Meeting** event.
- 16 Choose **Appointment>Show>Scheduling** .
- 17 **CHECK** Your screen should look like Figure 3.10.
- 18 Click **Close**.

 Continue to the next exercise.

## EXERCISE 3-3 (Continued)

### Determine When Attendees Are Available



FIGURE 3.9 Production group schedules

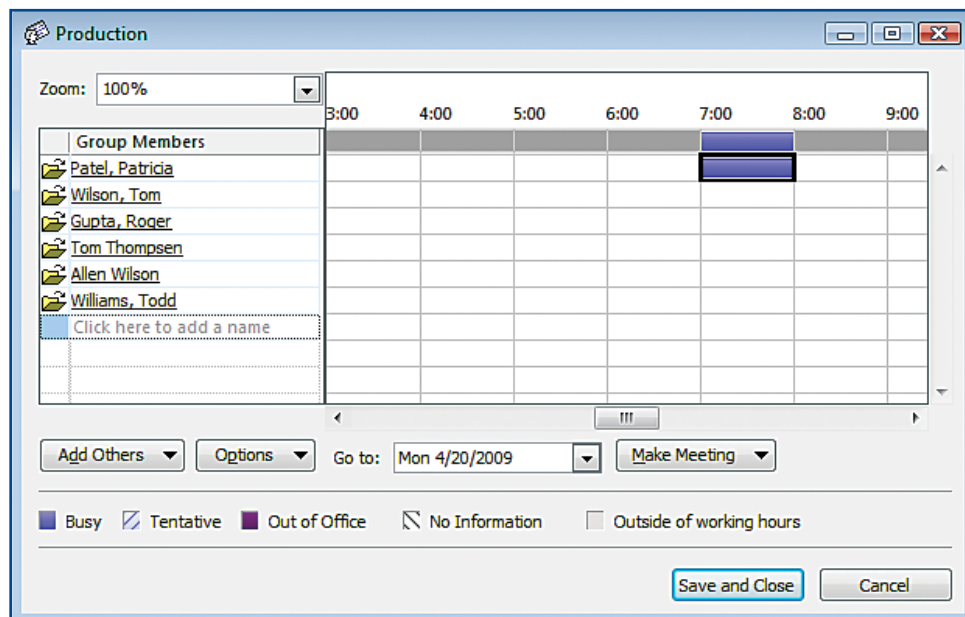
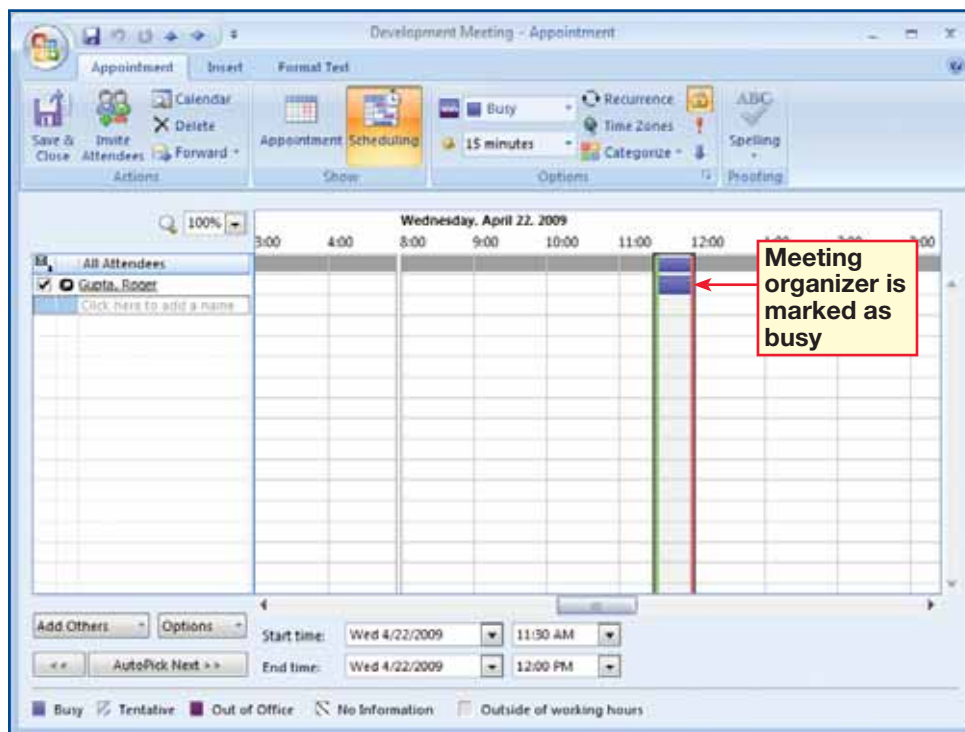







FIGURE 3.10 Meeting Scheduling window



## Step-By-Step

- 1 In **Calendar** view, choose **File>New>Meeting Request** .
  - 2 In the **Meeting** dialog box, in the **To** box, key the e-mail address provided by your teacher.
  - 3 In the **Subject** box, key: **Team Meeting**.
  - 4 In the **Location** box, key: **Conference Room**.
  - 5 Choose **Meeting>Show>Scheduling** .
  - 6 **CHECK** Your screen should look similar to Figure 3.11.
  - 7 For **Start time**, select the first **Monday** after the current date. Select a **Start time** of **9:00 AM**.
  - 8 Choose **Meeting>Show>Appointment** . Note the meeting times have been added to the invitation.
  - 9 **CHECK** Your screen should look like Figure 3.12.
  - 10 Click **Send** .
-  Continue to the next exercise.

## EXERCISE 3-4 Schedule Meetings and Invite Attendees

You can send people a **meeting request** when you want to invite them to a meeting. By default, people who you send meeting requests to are considered **mandatory**, or required, attendees.

FIGURE 3.11 Event scheduling view

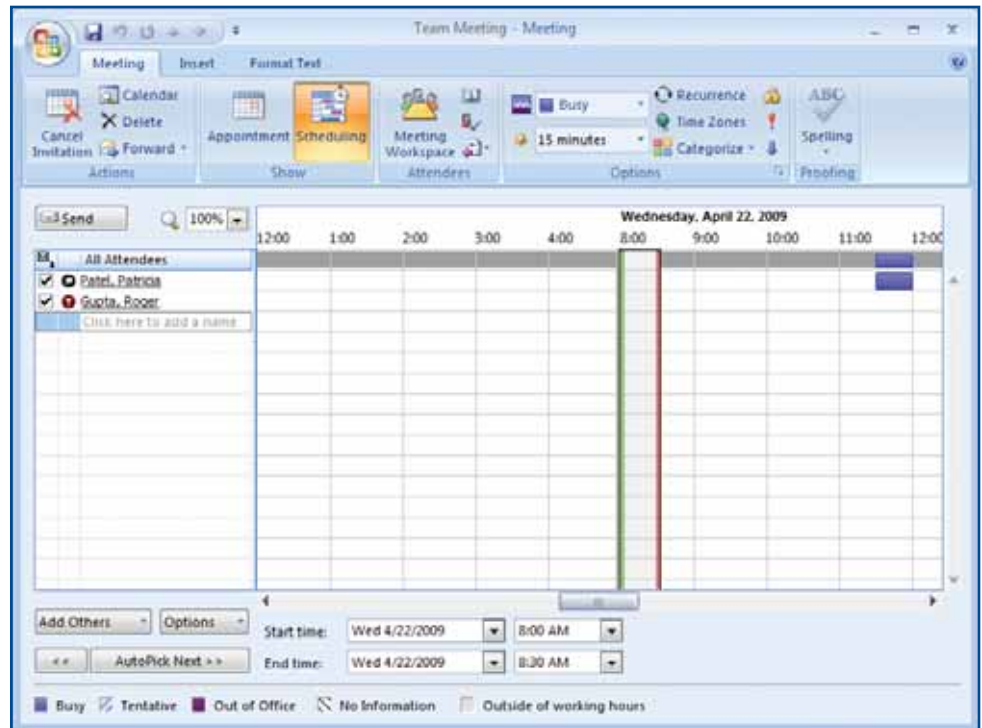
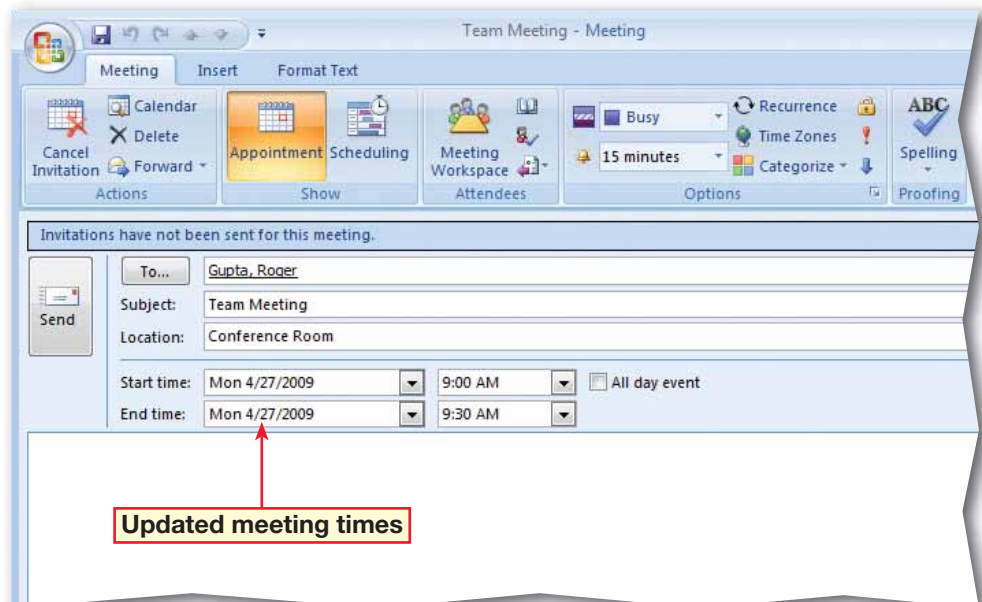


FIGURE 3.12 Updated Meeting Invitation



## Step-By-Step

- 1 In **Calendar** view, double-click the **Team Meeting** event.
- 2 Choose **Meeting>Show>Scheduling**.
- 3 **CHECK** Your dialog box should look similar to Figure 3.13.
- 4 Click **Add Others**. Select **Add from Address Book**.
- 5 **CHECK** Your screen should look similar to Figure 3.14.
- 6 In the **Optional** box, key the e-mail address assigned by your teacher.
- 7 Select **Tom Thompsen** in the contacts list and click **Optional**. Click **OK**.
- 8 Click **Send**. In the **Send Update to Attendees** dialog box, click **OK**.

Continue to the next exercise.

### Academic Skills

Time management is an important part of any academic endeavor. On a separate sheet of paper, draw out an hourly grid from 8:00 AM to 5:00 PM for yesterday and write down at least five academic tasks you worked on and when.

## EXERCISE 3-5 Invite Optional Attendees

In the previous exercise, the attendees you invited were required attendees. You can also invite attendees who may be interested in attending the event, but who are not required to attend. These attendees are optional, in that they have the option of not attending the meeting or event. You can select a contact from the list, or key an e-mail address into the Optional box.

FIGURE 3.13 Team Meeting

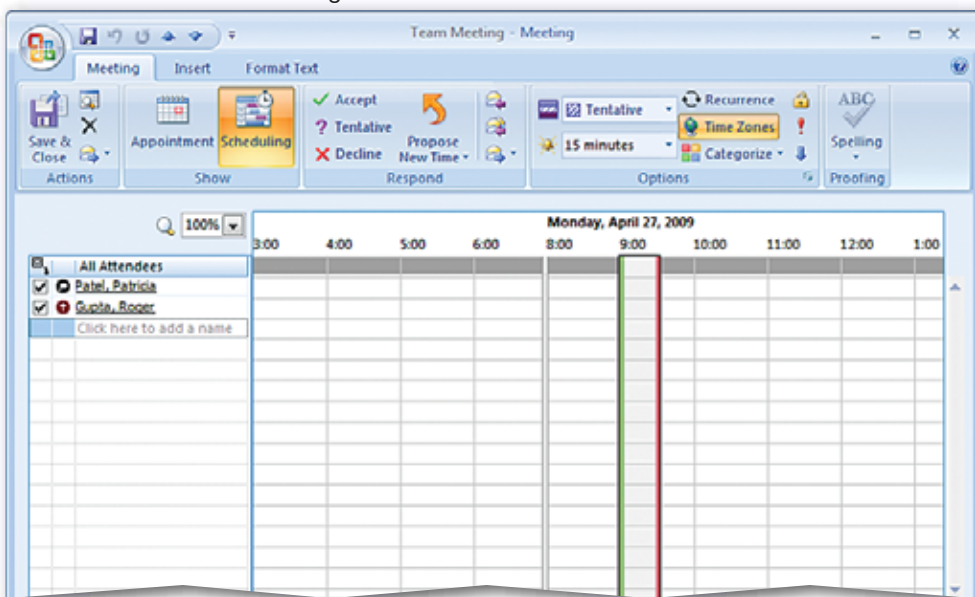
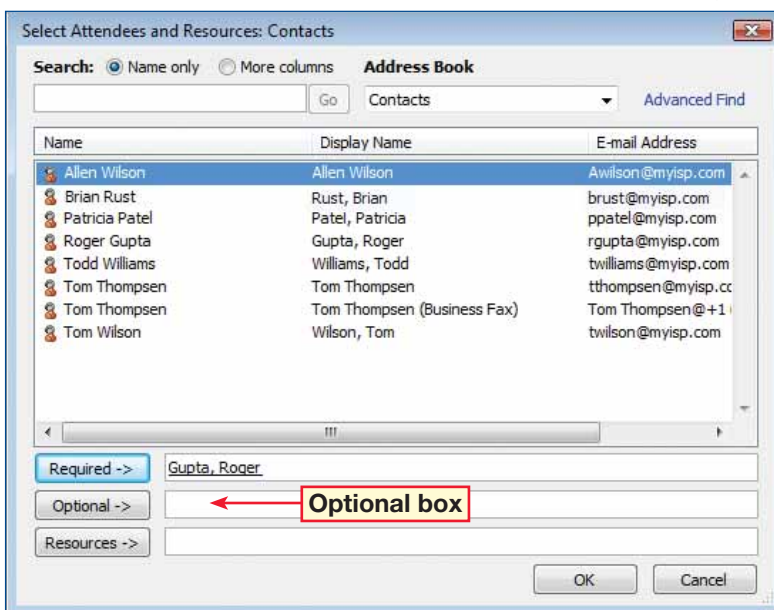


FIGURE 3.14 Select Attendees and Resources: Contacts dialog box



## Step-By-Step

- 1 In the **Month** view, open the **Team Meeting** (see Figure 3.15).
- 2 Choose **Meeting>Show>Tracking**.
- 3 **CHECK** Your screen should look like Figure 3.16.
- 4 Note who has accepted, declined, or tentatively accepted the meeting request.
- 5 Click **Close** to close the meeting.

Continue to the next exercise.

### You Should Know

To change how a meeting request is tracked, choose **Tools>Options**. Under **E-mail**, click **E-mail Options**. Under **Message handling**, click **Tracking Options**. You can set options so that Outlook will automatically move, delete, or respond to meeting responses.

## EXERCISE 3-6

### Track Responses to Meeting Requests

After you have sent out invitations to a meeting, Outlook enables you to track the responses to the request. You can track how many people will attend and whether attendees want a different time for the meeting.

FIGURE 3.15 Calendar Month view

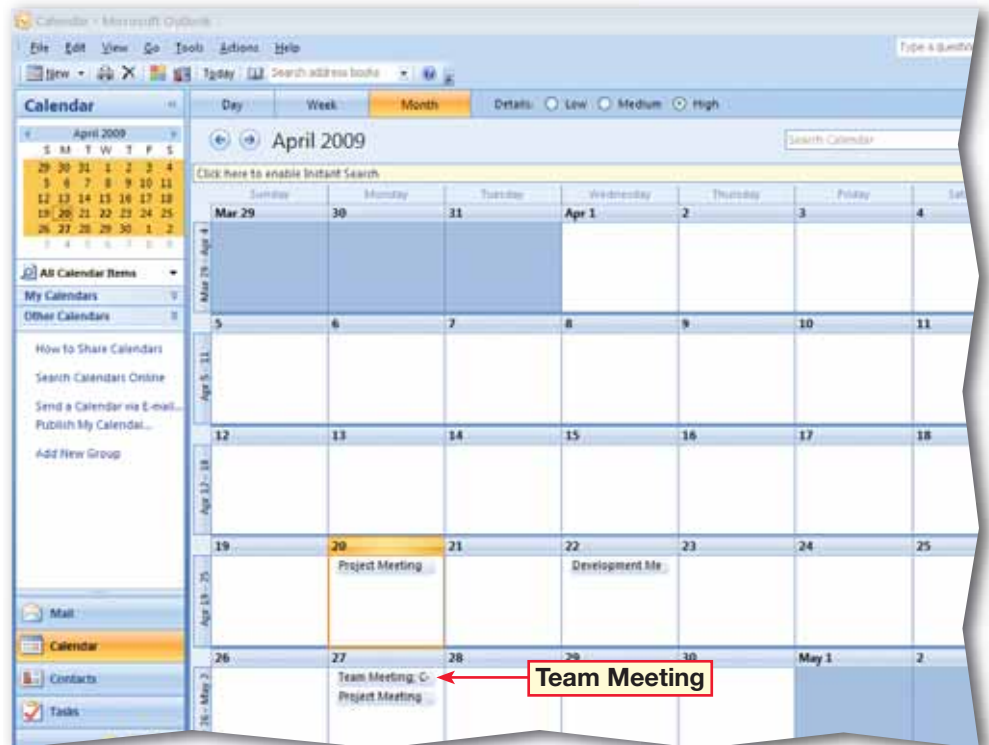
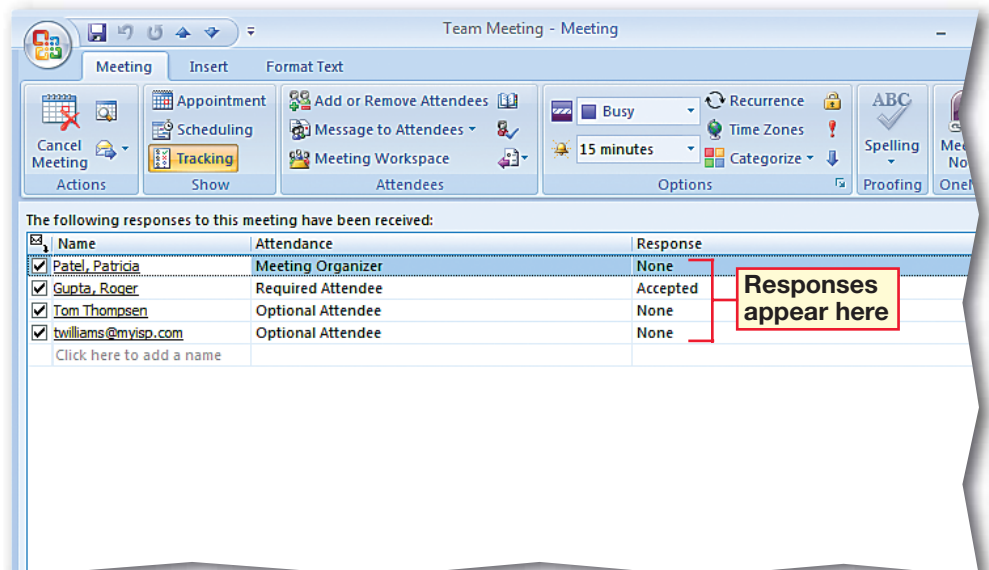


FIGURE 3.16 Team Meeting accept/decline e-mail tracking



## Step-By-Step

- 1 In the **Calendar**, double-click **Team Meeting**.
- 2 Choose **Meeting>Show>Scheduling**.
- 3 Click **Add Others** and select **Add from Address Book**.
- 4 In the **Select Attendees and Resources:** **Contacts** dialog box, in the **Resources** box, key: **Projector**.
- 5 **CHECK** Your screen should look like Figure 3.17.
- 6 Click **OK**.
- 7 In the **Check Names** box, click **Cancel**.
- 8 **CHECK** Your screen should look like Figure 3.18.
- 9 Click **Close**. In the dialog box, make sure **Don't save changes** is selected and click **OK**.

### Shortcuts

You can turn an appointment into a meeting. Click **Invite Attendees** in the **Appointment** dialog box.

## EXERCISE 3-7

### Schedule Resources for Meetings

In addition to inviting attendees, you can also use Outlook to schedule **resources**. Resources are items that you need to conduct a meeting. Resources might include the conference room where the meeting is to be held, a speakerphone that you need for a conference call, or a projector and a laptop computer that you need to show a PowerPoint presentation.

FIGURE 3.17 Team Meeting scheduling window

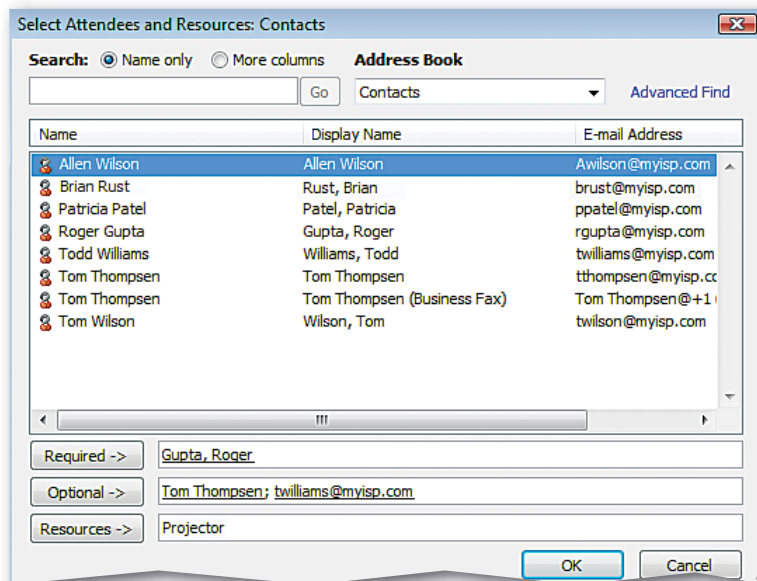
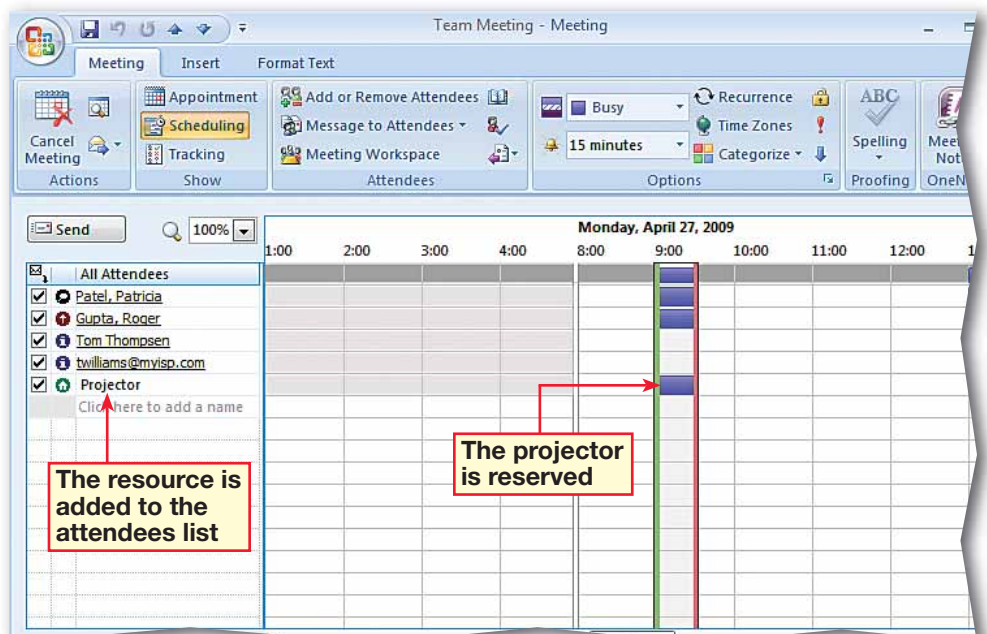


FIGURE 3.18 Scheduling window with resources added





## Step-By-Step

- 1 In the **Calendar**, double-click **Team Meeting**. Change the **Start time** to **10:00 AM**.
- 2 Click in the message area. Key: **I have a 9:00 AM conference call that day.**
- 3 **CHECK** Your screen should look like Figure 3.19. Click **Send Update**.
- 4 In the **Calendar**, double-click **Team Meeting**. Click **Cancel Meeting**.
- 5 In the message area, click after **I have a 9:00 AM conference call that day.** and key: **Can we reschedule for next week?**
- 6 Click **Send**.
- 7 **CHECK** Your screen should look like Figure 3.20. Double-click the third instance of the **Project Meeting**.
- 8 In the **Open Recurring Item** dialog box, click **Open this occurrence** and click **OK**.
- 9 Change the **Start time** to **2:00 PM**. Click **Save & Close**.

➔ Continue to the next exercise.

## EXERCISE 3-8

### Update and Cancel Meeting Requests

You might need to update or cancel a meeting request after you have sent it. You can easily add an attendee or change the meeting location or time. You can also include a note to tell attendees why you have changed your meeting request. After you have modified or canceled a meeting request, Outlook sends an update to the attendees.

FIGURE 3.19 Meeting rescheduled

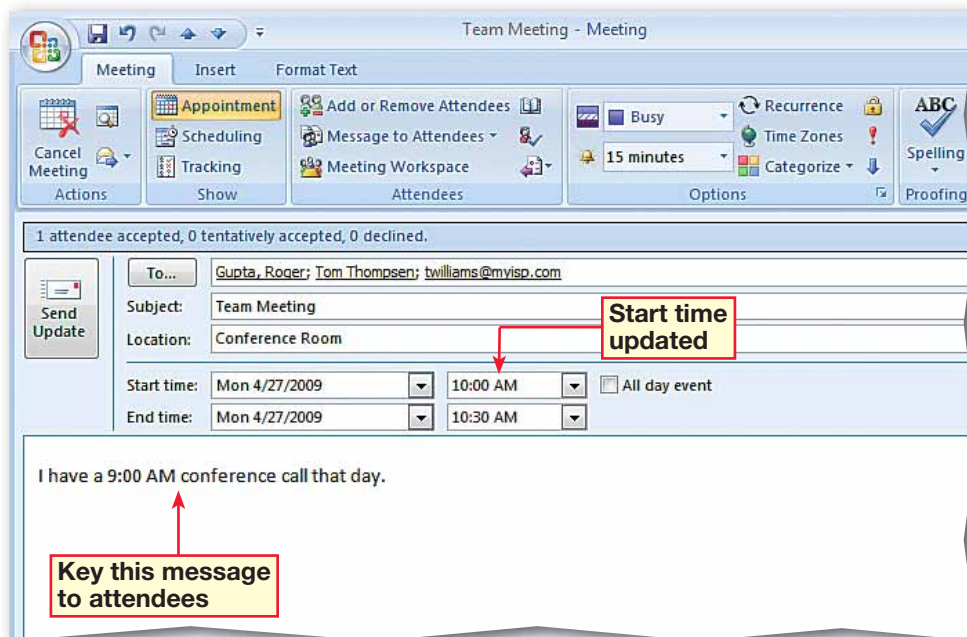
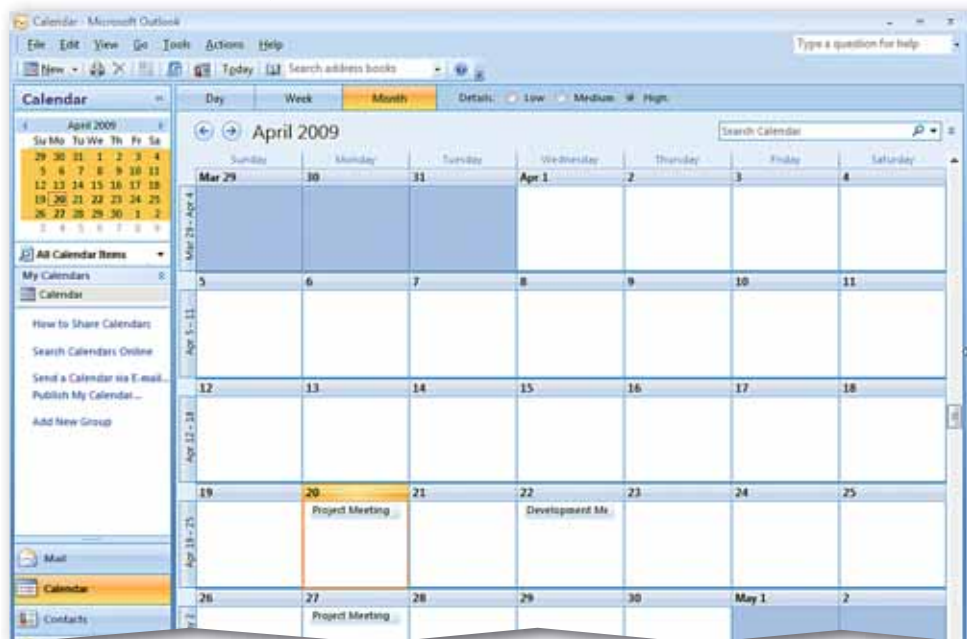


FIGURE 3.20 Meeting removed from Calendar



## Step-By-Step

- 1 In the **Navigation** pane, click **Mail**. In the **Inbox**, select the **Employee Picnic** message.
- 2 **CHECK** Your screen should look like Figure 3.21.
- 3 In the **Reading** pane, click **Decline**. Note the **Edit the response before sending** option is automatically selected. Click **Cancel**.
- 4 Click **Tentative**. Now the **Send the response now** option is selected. Click **Cancel**.
- 5 Click **Accept**. Click **Edit the response before sending**. Click **OK**.
- 6 Key the message shown in Figure 3.22. Click **Send**.
- 7 Click **Calendar** to view the Employee Picnic meeting.

Continue to the next exercise.

### Academic Skills

The term *tentative* means that you are uncertain about whether you will attend a meeting or event. What are some other words that have a similar meaning to tentative?

## EXERCISE 3-9

### Accept and Decline a Meeting Request



When you receive a meeting request, you can accept or decline the invitation. You can also choose to include a message with your response. If you are not sure whether or not you will attend the meeting, send a **tentative** response. If you tentatively accept, the meeting will appear on your Calendar with a striped blue bar next to it.

FIGURE 3.21 Employee Picnic request in Reading pane

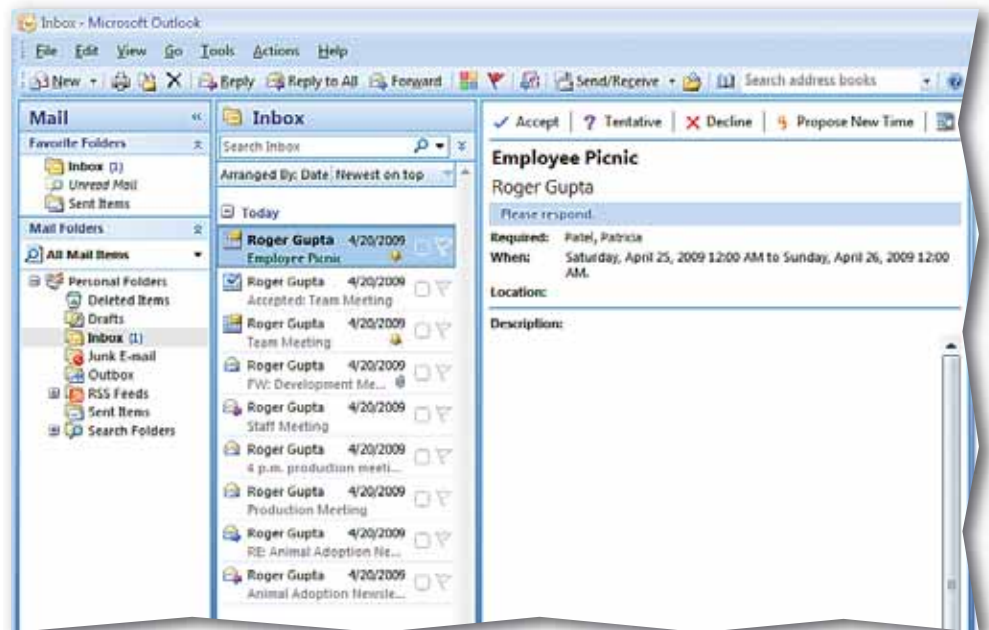
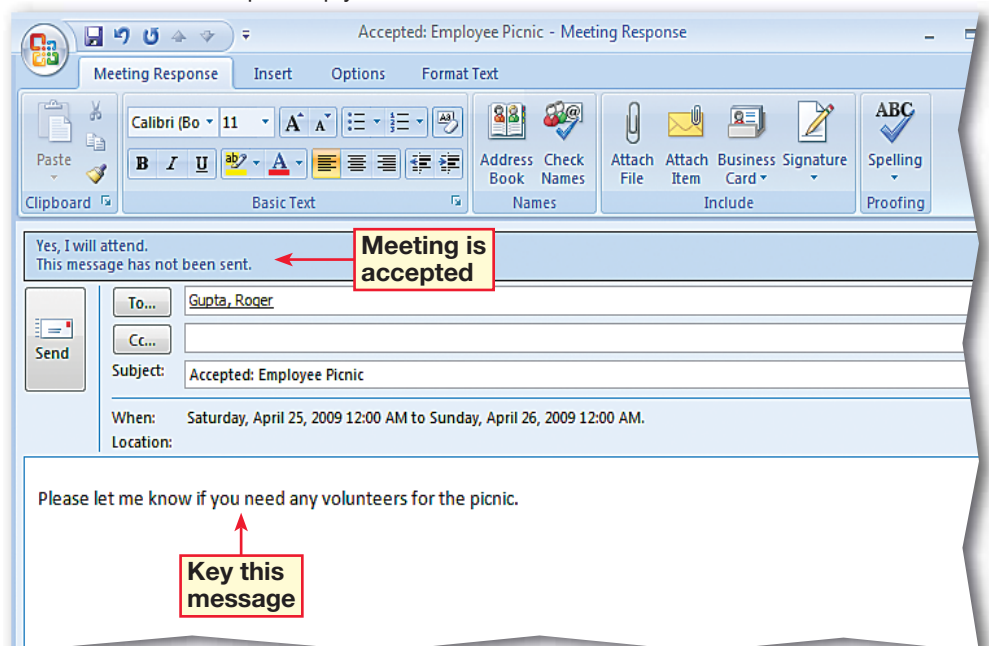


FIGURE 3.22 Accepted reply



## Step-By-Step

- 1 Double-click **Employee Picnic**.
- 2 In the **Invited Event** dialog box, click **Propose New Time**.
- 3 In the **Propose New Time** dialog box, click the **Meeting start** date drop-down arrow. Select the **Saturday** a week after the scheduled event (see Figure 3.23).
- 4 Change the **Meeting end** date to the same date. Change the **Meeting start** time to **12:00 PM**. Change the **Meeting end** time to **4:00 PM**.
- 5 Click **Propose Time**.
- 6 **CHECK** Your screen should look like Figure 3.24.
- 7 Click **Send**. Your message is sent to the person who invited you to the picnic.

Continue to the next exercise.

### You Should Know

The meeting organizer can also prohibit attendees from proposing new times for a meeting.

## EXERCISE 3-10 Propose a New Meeting Time

If a meeting time does not work for you, you can **suggest**, or propose, a new meeting time. You can do this when you receive a meeting request, or after you have accepted the request. Check the Calendar to find a new time for the meeting.

FIGURE 3.23 Propose New Time dialog box

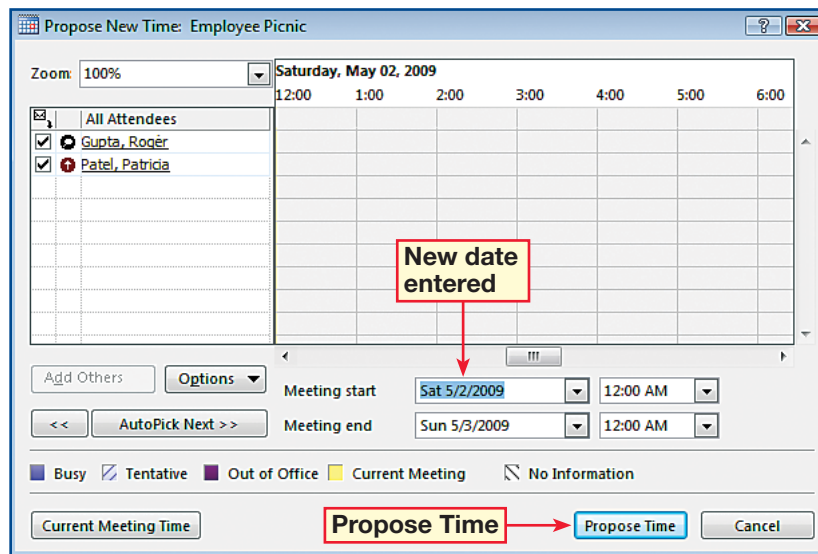
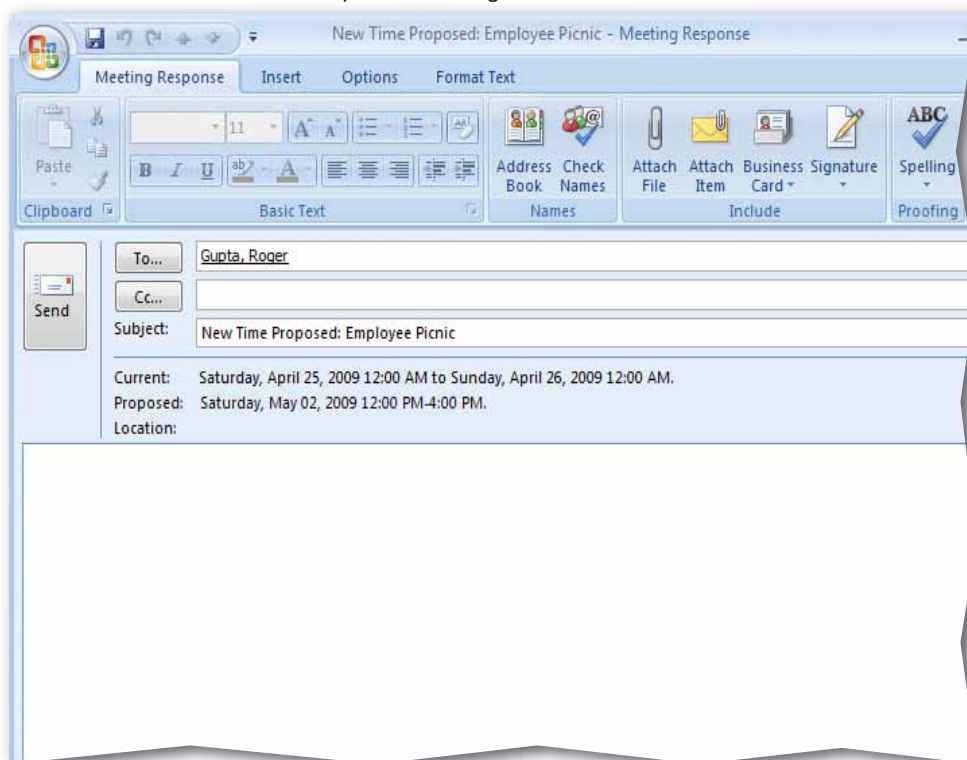


FIGURE 3.24 New Time Proposed message



## Step-By-Step

- 1 In **Calendar** view, click **New**. Select **Appointment>Actions>Invite Attendees**.
- 2 Fill in the **To:**, **Subject:**, **Location:**, and meeting start and end times as shown in Figure 3.25. Click **Send**.
- 3 **CHECK** Your screen should look like Figure 3.25.
- 4 In **Calendar** view, select the **Picnic Planning** meeting. Choose **Meeting>Attendees>Add or Remove Attendees**.
- 5 In the **Select Attendees and Resources** dialog box, in the **Required** box, key the name of a classmate provided by your teacher (see Figure 3.26).
- 6 Click **OK**.
- 7 Click **Send Update** and click **Yes** to send without a location.
- 8 In the **Send Update to Attendees** dialog box, select **Send updates only to added or deleted attendees** and click **OK**.

➔ Continue to the next exercise.

## EXERCISE 3-11 Add a Meeting Attendee

Outlook allows you to add new attendees to the meeting after you have sent out a meeting request. For example, perhaps a new person has just joined your organization and you want to invite him or her to the a fundraising dinner. You can add the person as a new attendee and send the appropriate message.

FIGURE 3.25 Employee Picnic event open

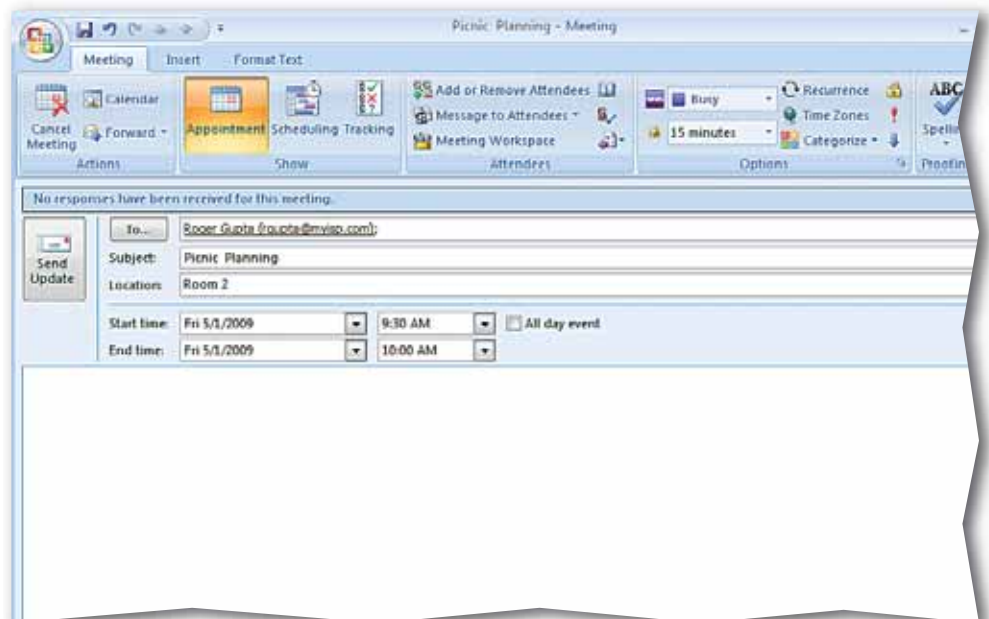
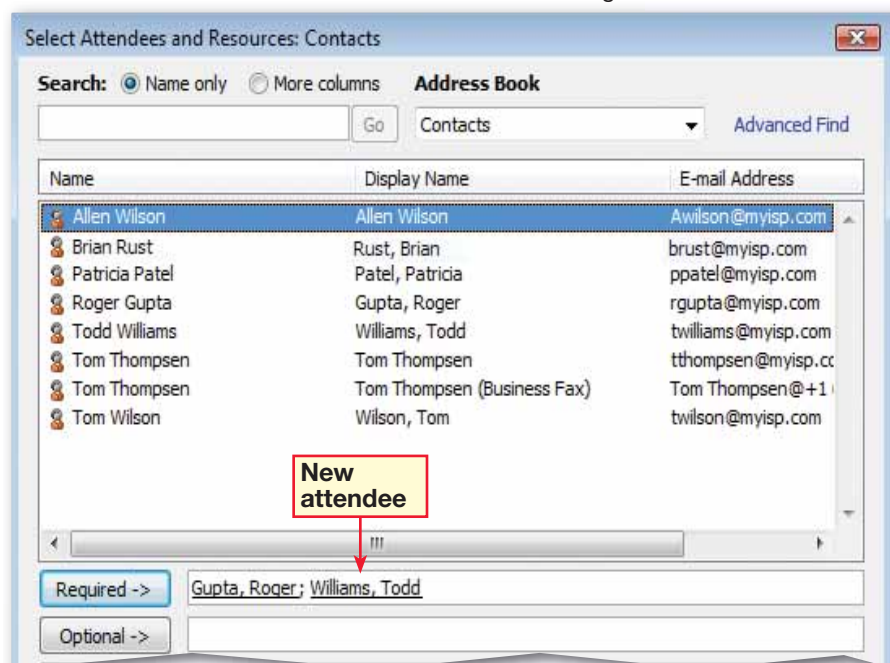




FIGURE 3.26 Select Attendees and Resources dialog box



## Step-By-Step

- 1 Open the **Picnic Planning** meeting.
- 2 Choose **Meeting>Actions>Forward** .
- 3 **CHECK** Your screen should look like Figure 3.27.
- 4 In the **To** box, key the e-mail address of a new classmate assigned by your teacher.
- 5 In the message body, key:  
**Do you know where the picnic area is?**
- 6 **CHECK** Your screen should look like Figure 3.28.
- 7 Click **Send** .
- 8 Click **Close** to close the meeting.

 Continue to the next exercise.

### Tech Tip

To update all appointments in a recurring event, open an occurrence and in the **Open Recurring Item** dialog box, click **Open the series**.

## EXERCISE 3-12

### Send an Update to a New Attendee

Outlook also enables you to send updates to meetings only to specific individuals, so that others are not constantly receiving updates that do not apply to them. For example, you can use this option to familiarize your new employee with procedures that others might already be familiar with.

FIGURE 3.27 Picnic Planning meeting

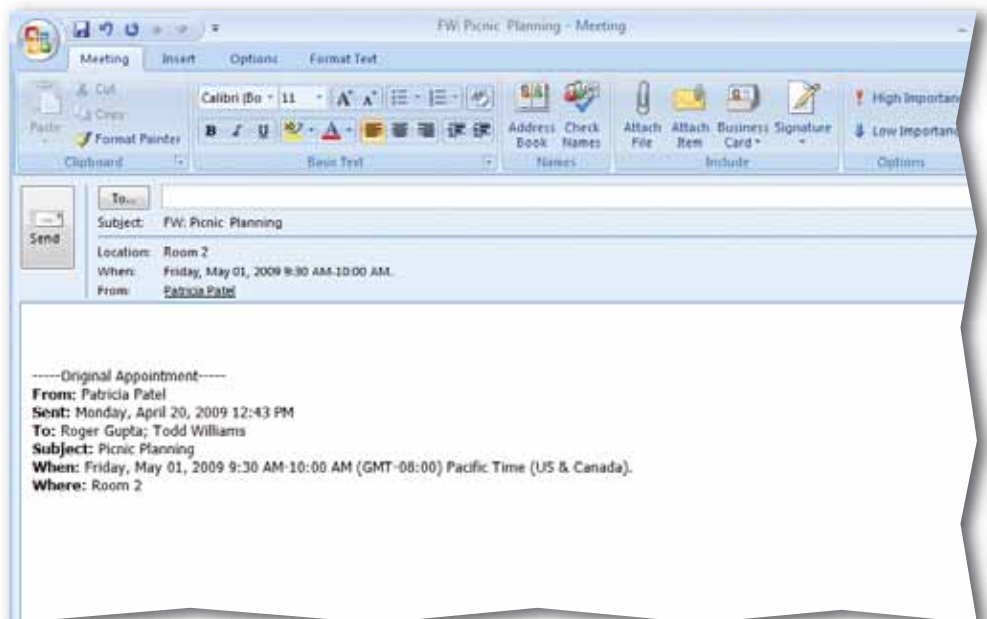
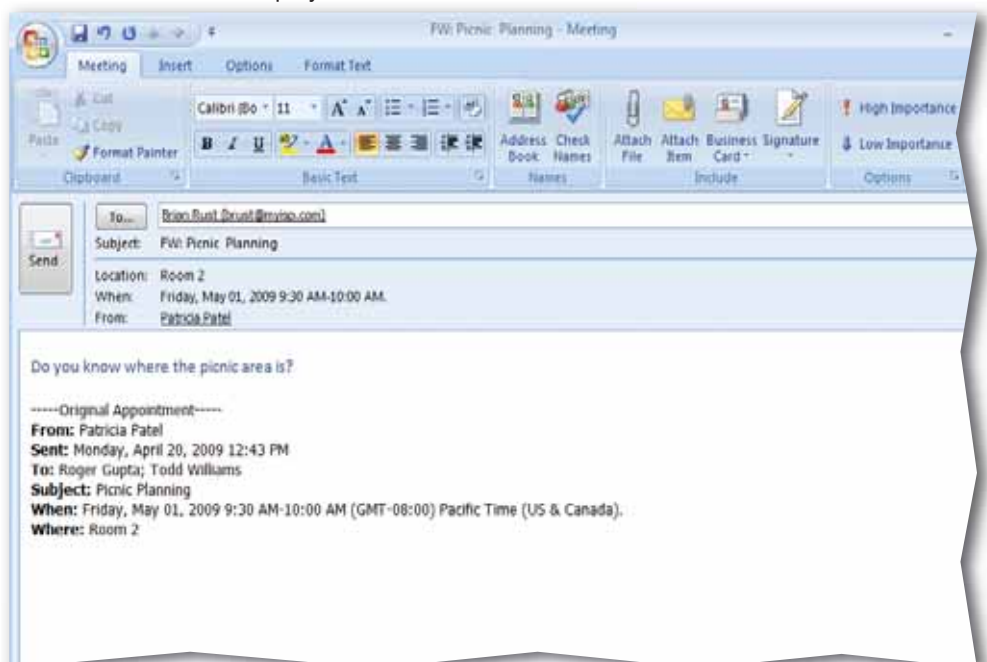


FIGURE 3.28 FW: Employee Picnic



## Step-By-Step

**1** On the **Menu** bar, choose **Tools>Options**. In the **Options** box, under **Calendar**, click **Calendar Options**.

**2** Under **Calendar work week**, make sure only **Mon, Tue, Wed,** and **Thu** are selected (see Figure 3.29).

**3** Click the **Start time** drop-down arrow.

**4** Select **8:30 AM**.

**5** Click the **End time** drop-down arrow.

**6** Select **6:30 PM**.

**7** Click **OK**. Click **OK** to close the **Options** dialog box.

**8** Click **Week** . Click **Show Work Week**, if necessary.

**9** **CHECK** Your screen should look like Figure 3.30.

 Continue to the next exercise.

### You Should Know

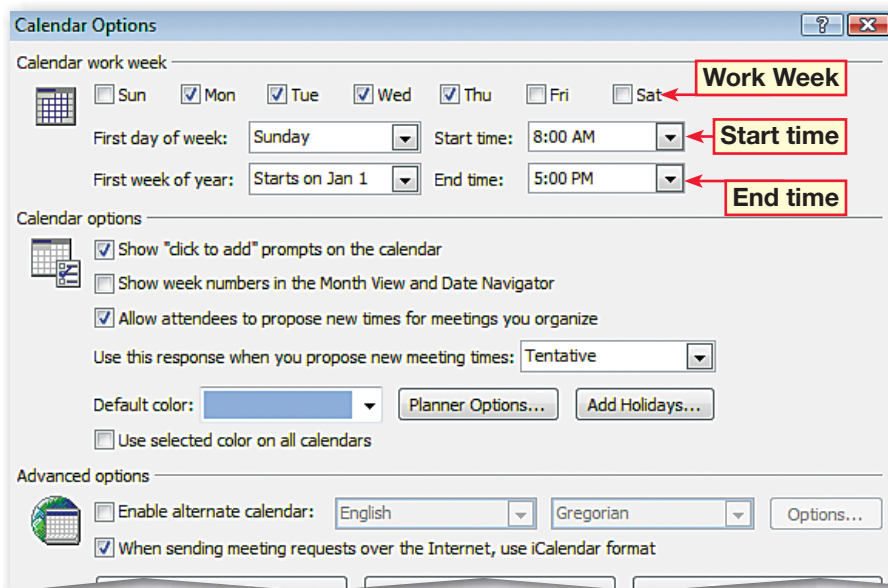
You can use **Calendar Options** to have your **Calendar** reflect your own work days and times.

## EXERCISE 3-13 Set Work Days and Times

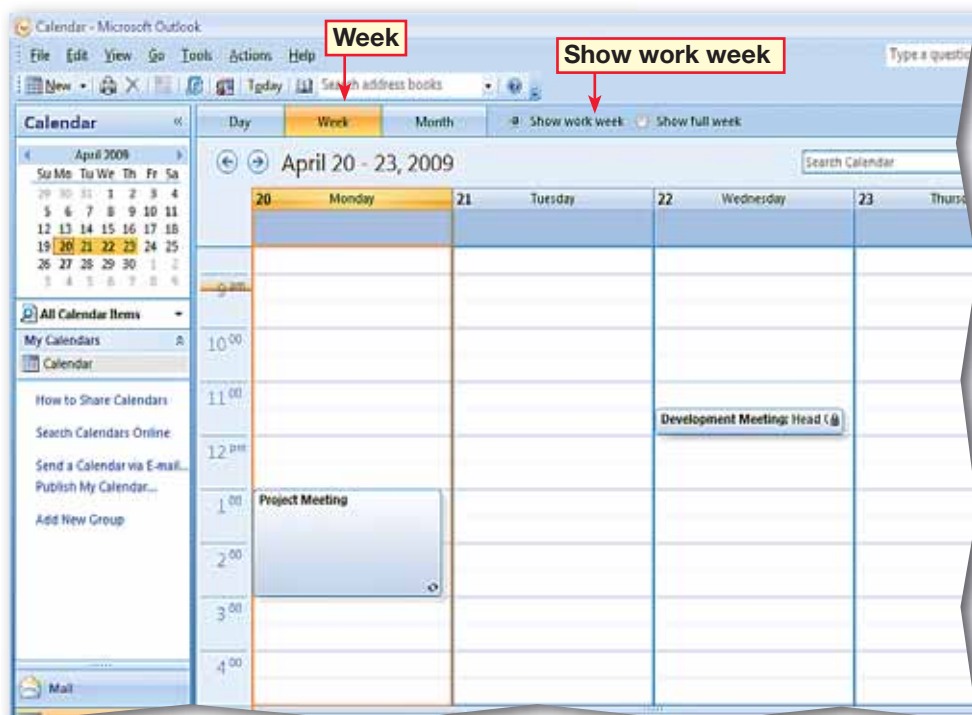


Not all organizations have the same work schedule. Many groups work Monday through Friday. However, some people also work Tuesday through Saturday. Some organizations also allow employees to set flexible work or volunteer hours.

**FIGURE 3.29** Calendar Options dialog box



**FIGURE 3.30** Calendar in Week view



## Step-By-Step

**1** On the **Menu** bar, choose **Tools>Options**. In the **Options** box, under **Calendar**, click **Calendar Options**.

**2** In the dialog box, under **Advanced options**, click **Time Zone**.

**3** **CHECK** Your screen should look like Figure 3.31.

**4** In the **Time Zone** dialog box, in the **Label** box, key: **East**. Click the **Time zone** drop-down arrow and select **Eastern Time (US & Canada)**.

**5** Under the **Additional time zone** header, check the **Show an additional time zone** box. In the **Label** box, key: **West**.

**6** Click the **Time zone** drop-down arrow and select **Pacific Time (US & Canada)**. Click **Change Calendar Time Zone**.

**7** Click **Cancel**. Click **OK**.

**8** Click **OK** to close **Calendar Options**. Click **OK** to close **Options**.

**9** **CHECK** Your screen should look like Figure 3.32. Note the multiple time zones.

 Continue to the next exercise.

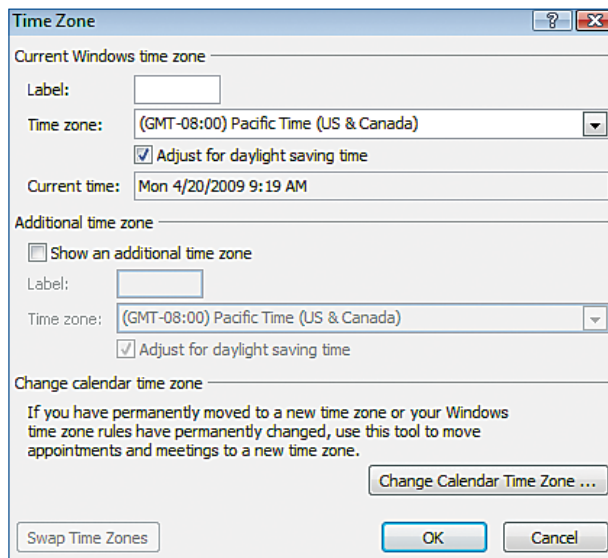
## EXERCISE 3-14

### Display and Change Time Zones

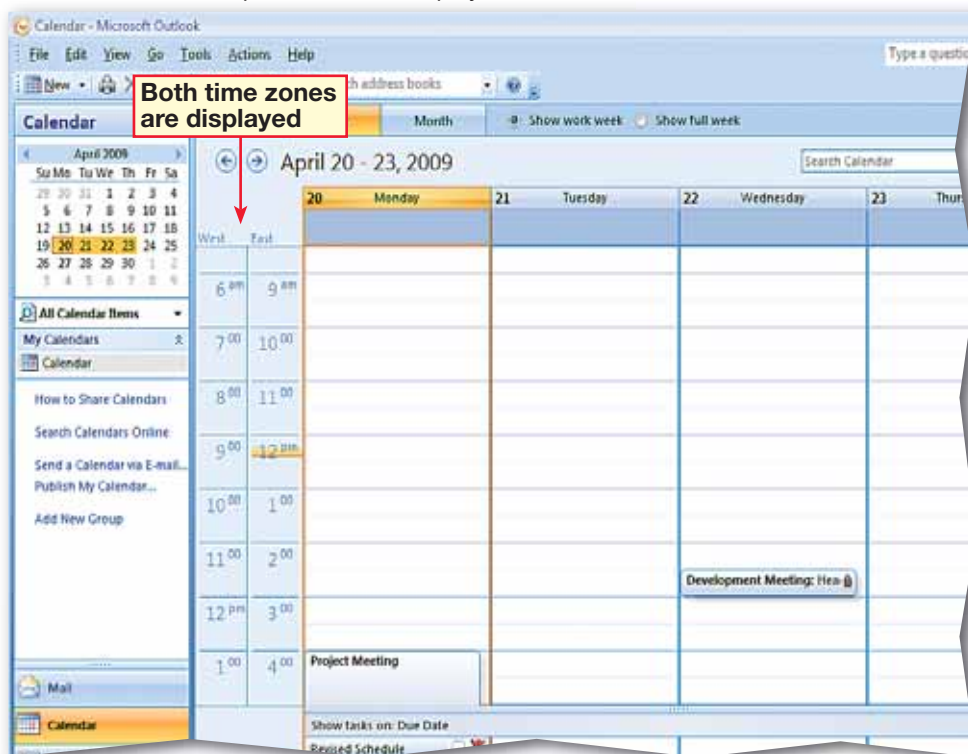


If you travel for work or need to keep track of contacts and Calendar items involving people and places that are far from you, you might want to view one or more time zones. Outlook allows you to change time zones or to display multiple time zones.

**FIGURE 3.31** Time Zone dialog box



**FIGURE 3.32** Multiple time zones displayed



## Step-By-Step

- 1 In the main menu, choose **Tools>Options**. Click **Calendar Options**.
- 2 **CHECK** Your screen should look like Figure 3.33.
- 3 Under the **Calendar options** area, click **Add Holidays**.
- 4 **United States** is selected in the **Add Holidays to Calendar** dialog box. Click **OK**.
- 5 Click **OK** to confirm the holidays were added to your Calendar.
- 6 Click **OK** twice.
- 7 Click **Month** to go to **Month** view in the Calendar. If necessary, scroll down to view the holidays.
- 8 **CHECK** Your screen should look like Figure 3.34.

Continue to the next exercise.

### Tech Tip

To remove a holiday from your Calendar, right-click the holiday event and select **Delete**.

## EXERCISE 3-15 Add Pre-Defined Holidays

Outlook already includes a number of holidays and events for various countries or regions around the globe. You can add any number of these predefined holidays to your Calendar and customize the Calendar to fit your needs.

FIGURE 3.33 Calendar Options dialog box

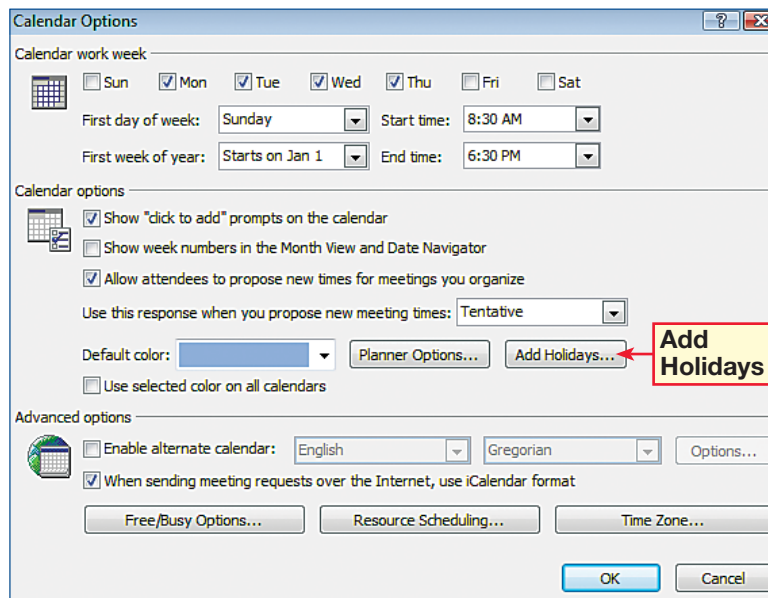
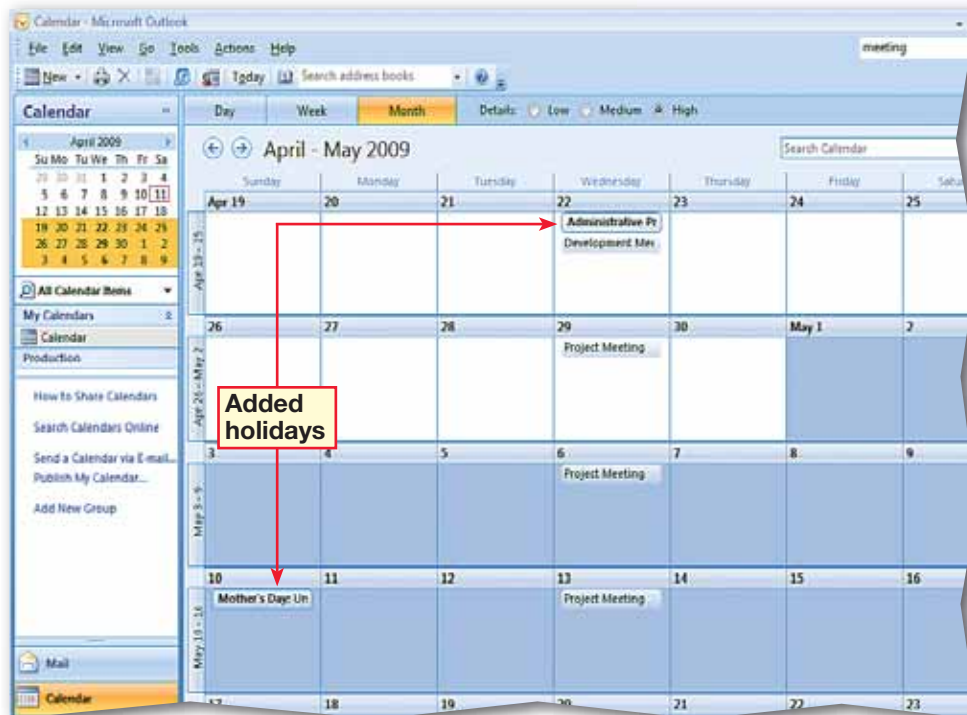


FIGURE 3.34 Holidays added to Calendar





## Step-By-Step

- 1 On the **Menu** bar, choose **Tools>Options**. Click **Calendar Options**.
- 2 Under **Advanced options**, click **Free/Busy Options**.
- 3 Read the information in the **Free/Busy Options** box and highlight the text in the **Publish** box. Key: **1**. Click **OK**.
- 4 **CHECK** Your screen should look like Figure 3.35.
- 5 Click **OK** in the **Calendar Options** box. Click **OK** in the **Options** box.
- 6 In the **Navigation** pane, under **My Calendars**, right-click **Calendar** and select **Properties**.
- 7 In the **Calendar Properties** dialog box, click the **Administration** tab (see Figure 3.36).
- 8 Under **This folder is available to** area, select **All users with access permission**. Click **OK**.

➔ Continue to the next exercise.

### Troubleshooter

You must be using Outlook on a Microsoft Exchange server to complete this exercise.

## EXERCISE 3-16

### Configure Privacy Settings and Share a Calendar with Outlook Users

In network or office situations where other Outlook users schedule meetings by checking user schedules, you might not want your Calendar viewed by other members of the organization. You can configure the Free/Busy settings in Outlook to display appointments or to hide that information from others. If you need others to view your Calendar without you sending them updates, you can set the permissions in Outlook for others to look at your Calendar directly.

FIGURE 3.35 Free/Busy Options box

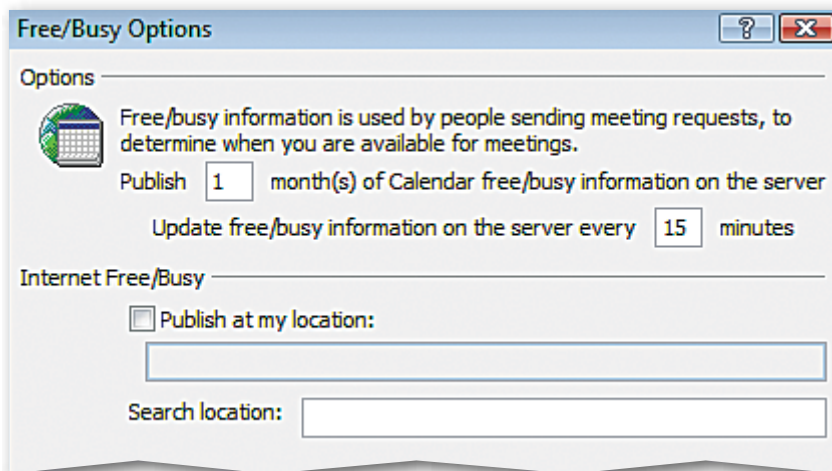
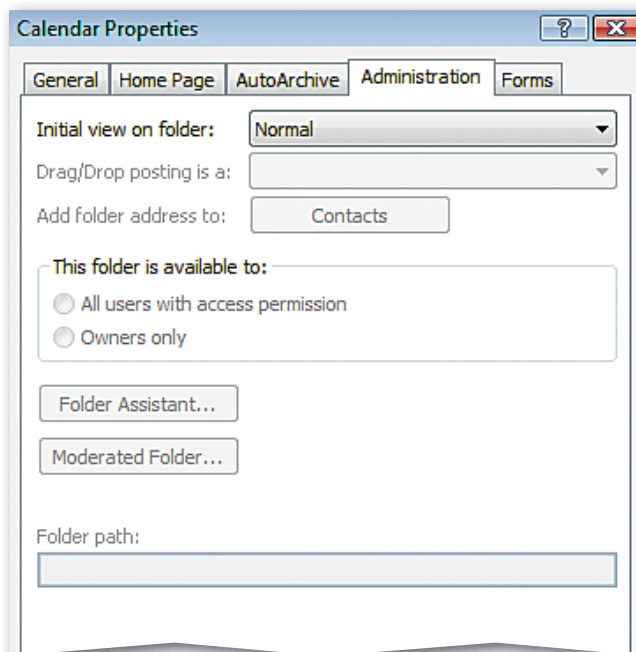


FIGURE 3.36 Calendar Properties dialog box



## Step-By-Step

- 1 In the **Navigation** pane under **My Calendars**, click **Send a Calendar via E-mail**.
- 2 **!CHECK** Your screen should look like Figure 3.37.
- 3 In the **Send a Calendar via E-mail** dialog box, click the **Date Range** drop-down button and select **Next 30 days**.
- 4 Click in the **Detail** box and select **Full Details** from the list.
- 5 Click **OK**.
- 6 **!CHECK** Your screen should look like Figure 3.38.
- 7 In the message **To** box, key the e-mail address of a classmate assigned by your teacher.
- 8 Click **Send**.

➔ Continue to the next exercise.

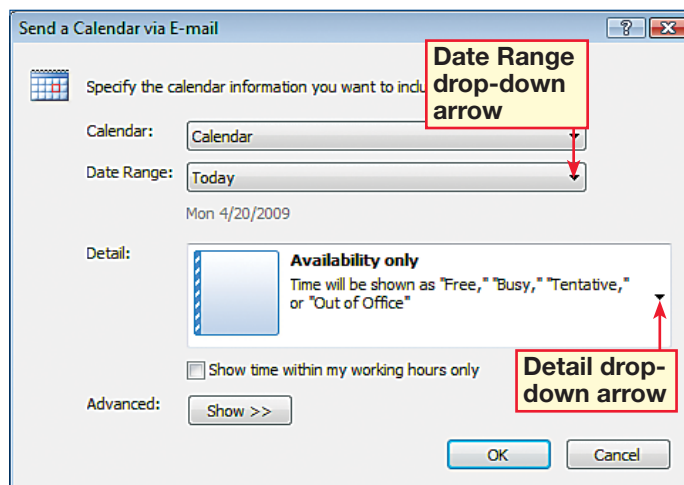
### You Should Know

You can send the Calendar showing full details, limited details, or only when you are available or not.

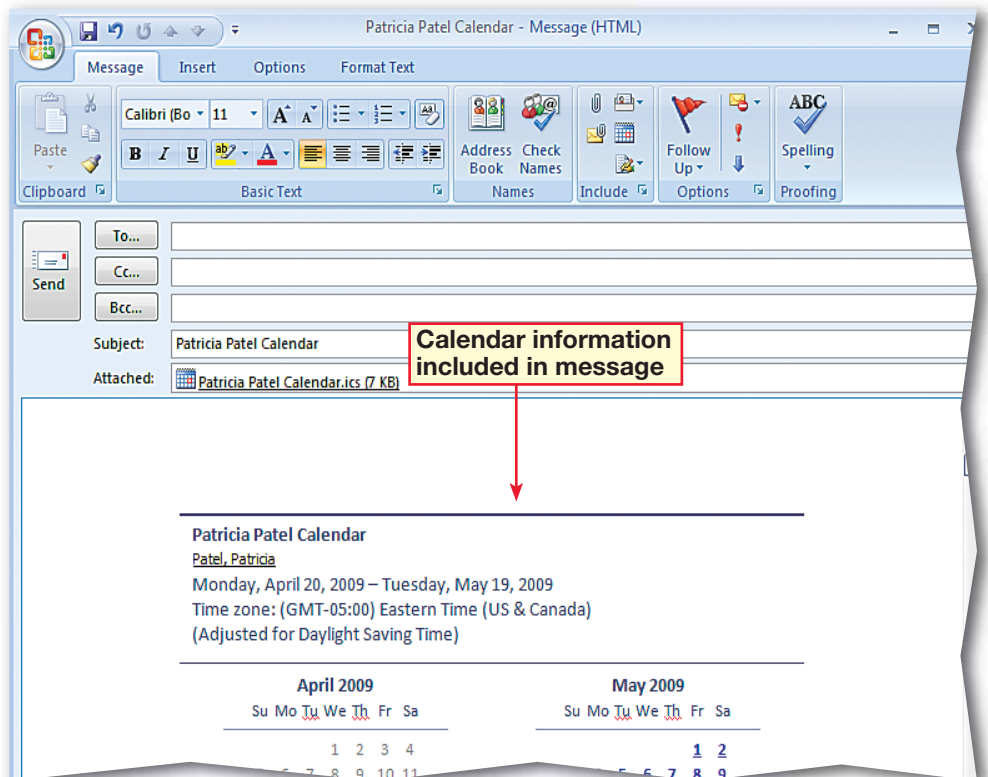
## EXERCISE 3-17 Send Calendar Information in an E-mail Message

If you are not on a Microsoft Exchange server, you can still share your Calendar information by sending it to someone via e-mail. Outlook makes that simple through the use of several automated helpers in the Navigation pane.

**FIGURE 3.37** Send a Calendar via E-mail dialog box



**FIGURE 3.38** Send a Calendar e-mail message



## Step-By-Step

- 1 In the **Navigation** pane, under **My Calendars**, click **Publish My Calendar** (see Figure 3.39).
- 2 In the **Sign In** dialog box, enter the password assigned by your teacher. In the **Detail** box, click the down arrow and select **Full Details**. Click **Advanced**.
- 3 Under **Upload Method**, select **Single Upload**. Make sure **Private Items** is not selected.
- 4 **CHECK** Your dialog box should look like Figure 3.40. Click **OK**.
- 5 Click **OK** in the **Publish Calendar** dialog box.
- 6 In the **Send a Sharing Invitation** dialog box, click **Yes** to send an invitation.
- 7 In the message **To** box, key the e-mail address of your assigned classmate. Click **Send**.

➔ Continue to the next exercise.

### Microsoft Office 2007

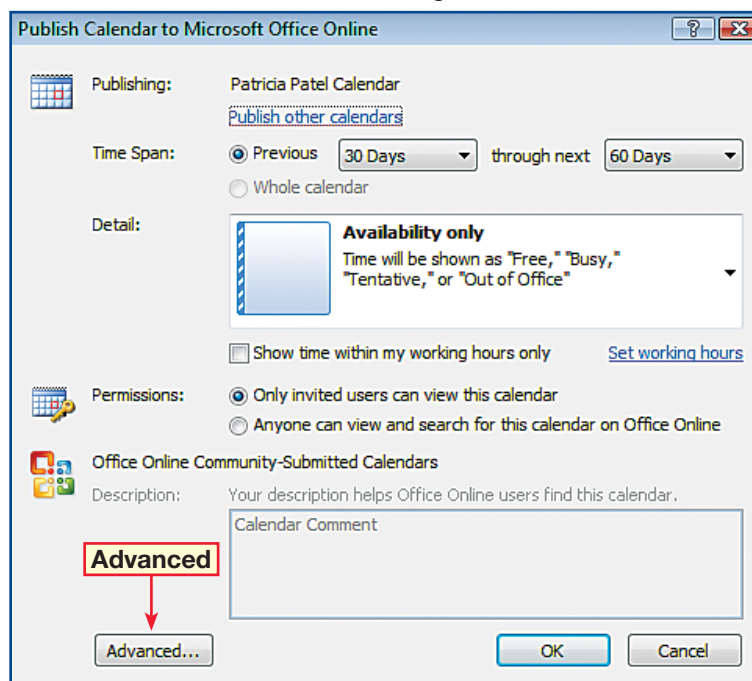
Microsoft Office 2007 offers many features through **Windows Live™**. To use these features, you must first register with **Windows Live**.

## EXERCISE 3-18 Publish a Calendar to Microsoft Office Online

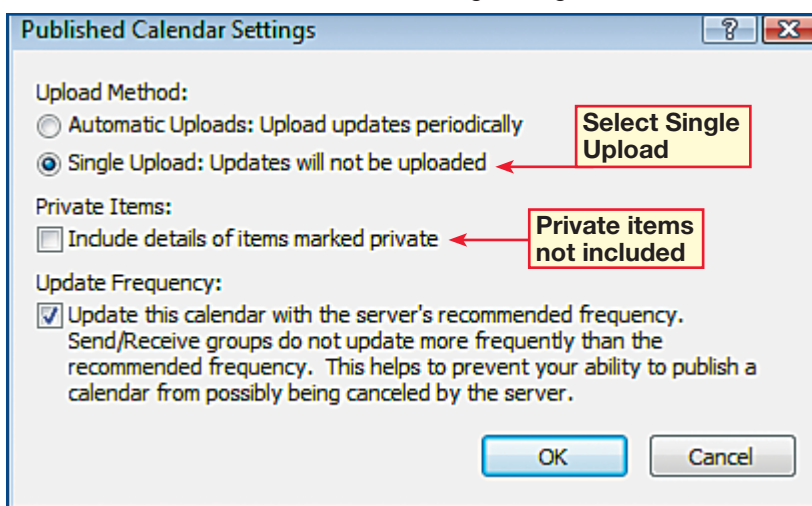


You can publish your Calendar online using Microsoft Office's online publishing site. This tool allows you to invite others to view your Calendar online. You can choose to hide any information that you have marked as private.

**FIGURE 3.39** Publish Calendar dialog box



**FIGURE 3.40** Published Calendar Settings dialog box



## Step-By-Step

**1** In **Calendar** view, click **Share my calendar**. In the **Sharing invitation** dialog box, in the **To...** box, key the name of a classmate assigned by your teacher.

**2** Be sure that the **Allow recipient to view your Calendar** box is checked. Check the **Request permission to view recipient's Calendar** check box. Click **Send**.

**3** In your Inbox, select the e-mail from your classmate. In the **Preview** pane, select **Allow**.

**4** You should receive a reply to your request, in your Inbox. Select the reply.

**5** Your screen should look similar to Figure 3.41. In the Preview pane, click **Open this calendar**.

**6** **CHECK** Your screen should look like Figure 3.42.

**7** In the **Navigation** pane, under **People's Calendars**, remove the check mark next to your classmate's Calendar.

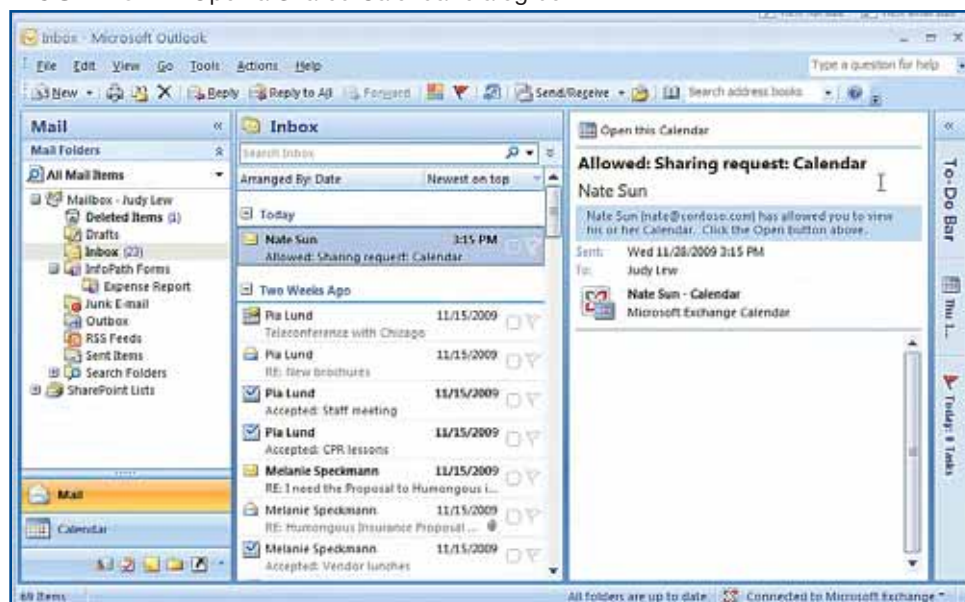
 Continue to the next exercise.

## EXERCISE 3-19

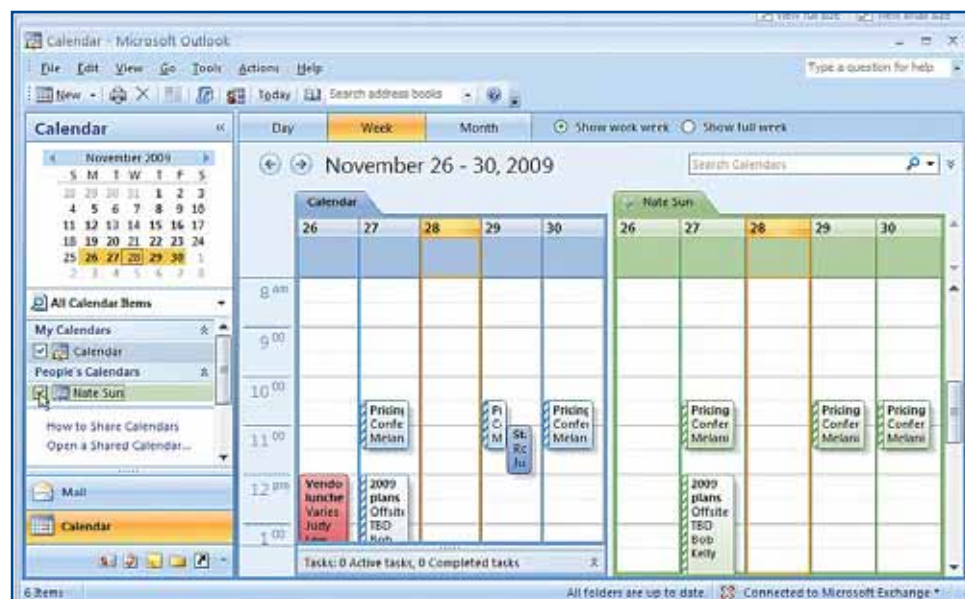
### View a Calendar Shared by a Network User

If you are on an Exchange server, you can ask for permission to view another person's calendar. In this exercise, you will send a request for access to a classmate's calendar. Once permission is granted, you will be able to view your classmate's calendar.

**FIGURE 3.41** Open a Shared Calendar dialog box



**FIGURE 3.42** User's Calendar and Shared Calendar view



## Step-By-Step

- 1 In the **Navigation** pane click **Mail**.
- 2 Open the message from your classmate with the subject **[classmate first name last name]\_Calendar-Internet Calendar**.
- 3 **CHECK** Your screen should look similar to Figure 3.43.
- 4 Choose **Share>Open>Subscribe to this Calendar**.
- 5 In the dialog box, click **Yes** to add this calendar to Outlook and subscribe to updates.
- 6 In the **Sign In** dialog box, key the user name and password assigned by your teacher.
- 7 Click **OK**.
- 8 Click **Close** to close the message.
- 9 **CHECK** Your screen should look similar to Figure 3.44.

Continue to the next exercise.

## EXERCISE 3-20

### Subscribe to an Internet Calendar

Outlook is not limited only to Calendars shared among your networked coworkers. You can go online to several different sites and subscribe to calendars that will be updated to your calendar over a period that you can define.

FIGURE 3.43 Internet Calendar message

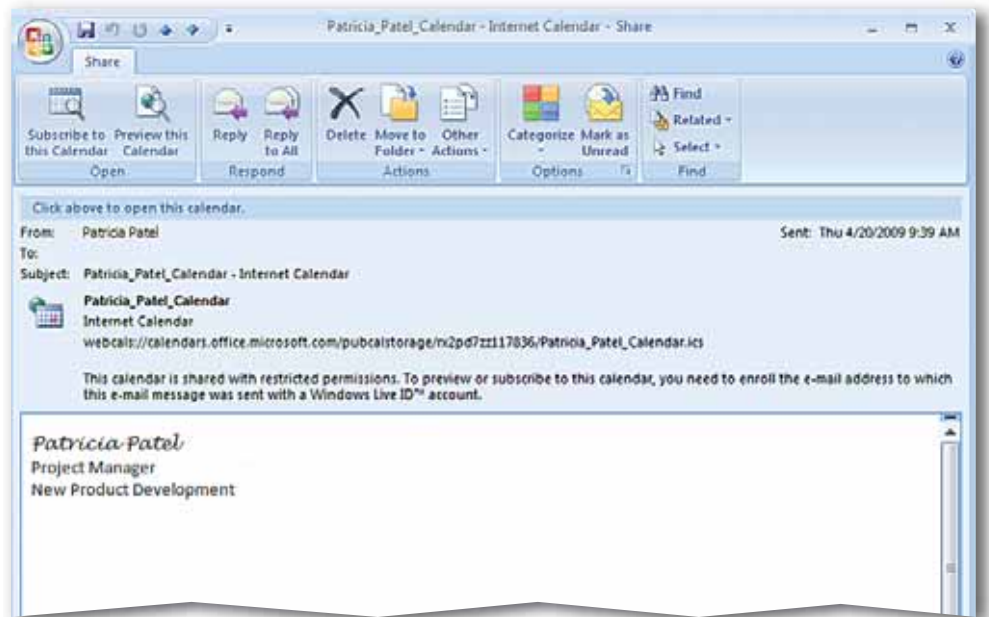
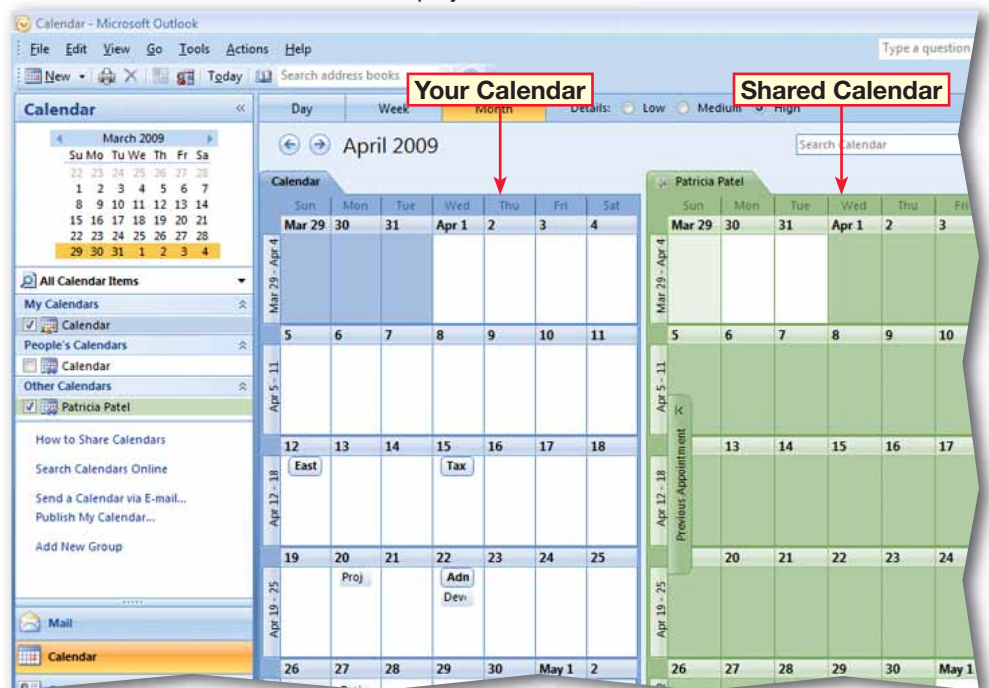


FIGURE 3.44 Internet Calendar displayed in Calendar view



## Step-By-Step

- 1 In the **Navigation** pane under **People's Calendars**, put a check in the box next to another classmate's shared Calendar.
- 2 **CHECK** Your screen should look like Figure 3.45.
- 3 On the **Menu** bar, choose **View>View in Overlay Mode**.
- 4 In the shared **Calendar** tab on the right, click the **View in Overlay Mode** arrow. In the preview pane, click **Open this calendar**.
- 5 **CHECK** Your screen should look similar to Figure 3.46.
- 6 Click the tab on your Calendar.
- 7 In the **Navigation** pane under **People's Calendars**, clear all the check boxes.

Continue to the next exercise.

### Academic Skills

The term *overlay* means that the calendars are overlapping, similarly to a Venn diagram.

## EXERCISE 3-21

### View Multiple Calendars in Overlay Mode

If you are on an Exchange server, Outlook offers several ways to view Calendars in order to make them more readable. You can view Calendars as separate items side by side or use Outlook's Overlay Mode. In **Overlay Mode**, one or more Calendars are placed on top of each other, merging the scheduled meetings and events into one Calendar. You can easily find conflicting appointments or view the availability of others before scheduling a meeting.

FIGURE 3.45 Calendar Month view with three Calendars

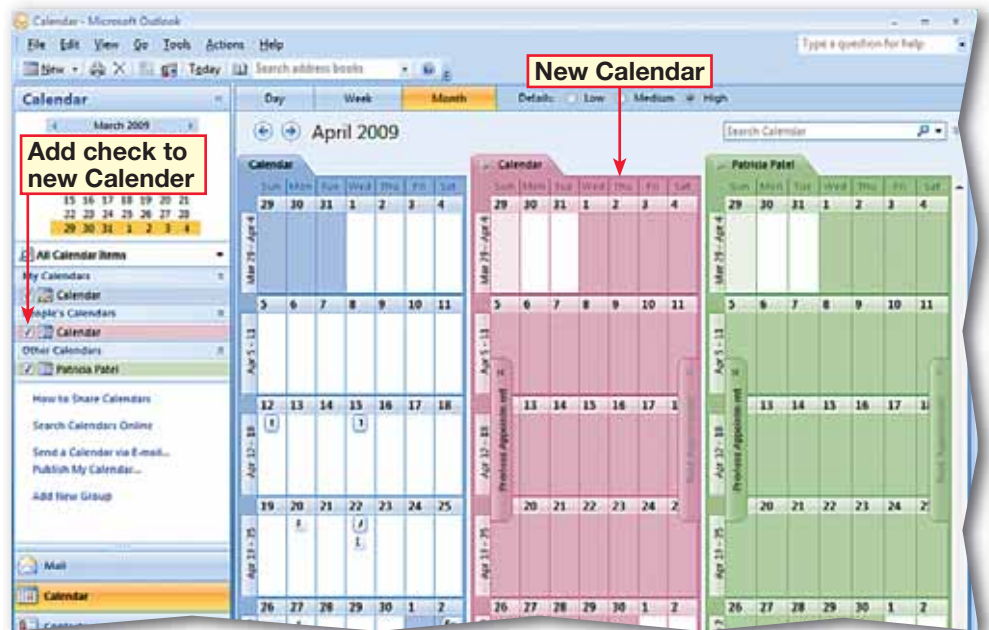
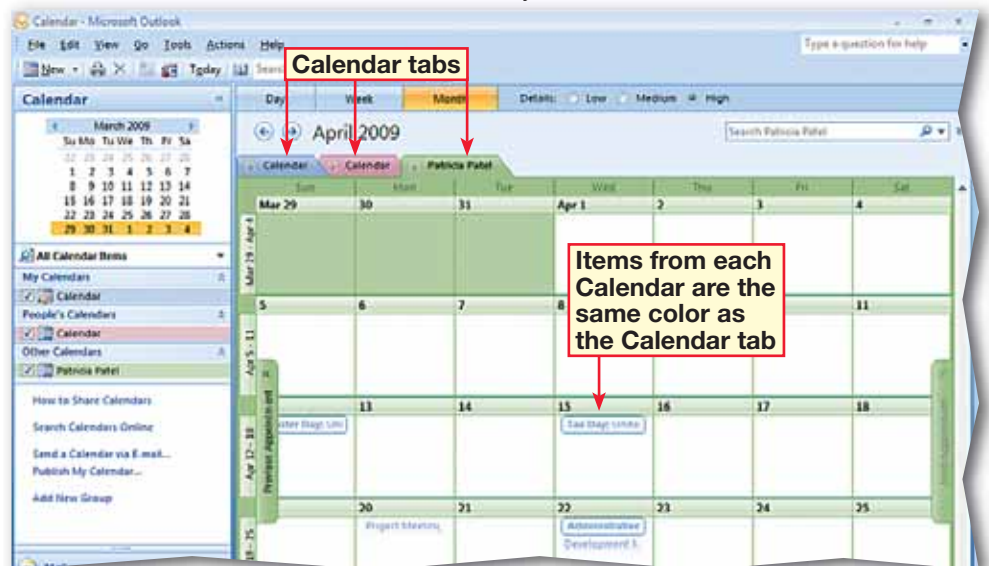



FIGURE 3.46 Calendar Month view in Overlay mode



## Step-By-Step

- 1 In the **Navigation** pane, click **Tasks**.
- 2 **CHECK** Your screen should look like Figure 3.47.
- 3 Click **New Task** . In the **Subject** box, key: **Conference Materials**.
- 4 In the **Start date** box, click the drop-down arrow and select the first Monday of this month.
- 5 In the **Due date** box, click the drop-down arrow and select the Monday six months from the **Start date**.
- 6 Click the **Status** drop-down arrow and select **In Progress**.
- 7 Set the **Priority** to **High**.
- 8 Change % **Complete** to **50%**. Press **ENTER**.
- 9 **CHECK** Your screen should look like Figure 3.48.

 *Continued to the next page.*

### You Should Know

When one task has *priority* over another, it means that it should be given attention before completing the other task.

## EXERCISE 3-22 Create and Modify Tasks

A **task** is a personal or work-related duty that you want to track from start to finish. When you create a task, you note when you will start the task and when it is due to be finished. You can also identify a task's **priority**, or relative importance, and track your progress as you complete the task. Use the **Task list** to view and modify tasks.

FIGURE 3.47 Task List view

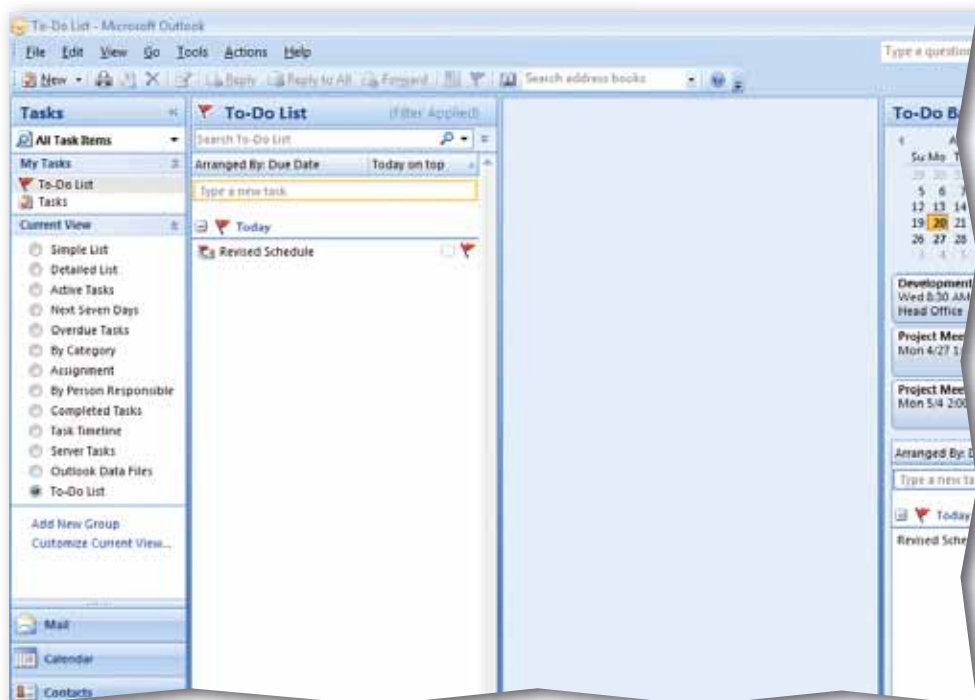
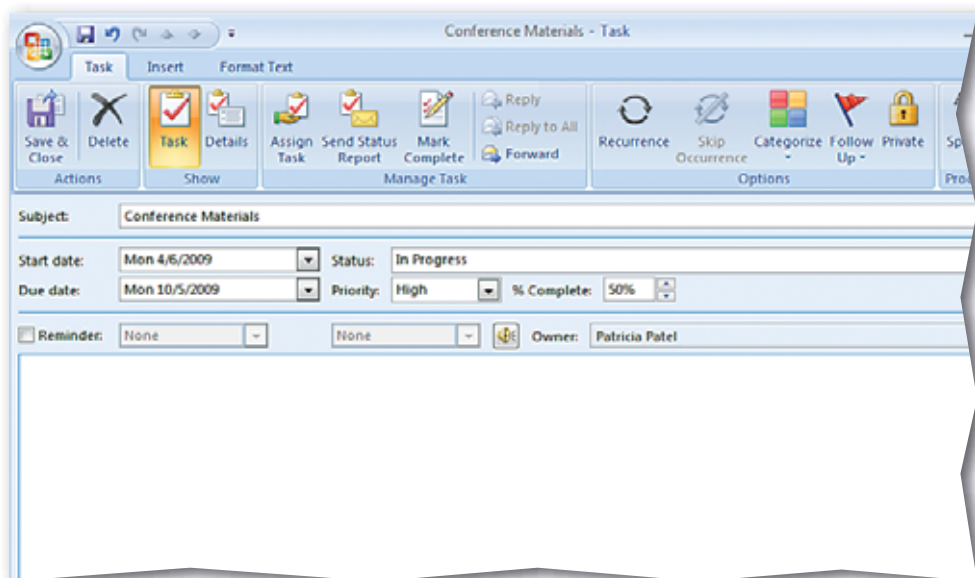






FIGURE 3.48 New Task window



## Step-By-Step

- 10 Choose **Task>Options>Recurrence** .
  - 11 In the **Task Recurrence** dialog box, under **Range of recurrence**, select **End by**.
  - 12 Click the drop-down arrow and change the end by date to the due date you selected in Step 6 (see Figure 3.49). Click **OK**.
  - 13 Click **Save & Close** .
  - 14 **! CHECK** Your screen should look like Figure 3.50.
  - 15 Double-click the **Conference Materials** task to open it.
  - 16 In the **Status** drop-down menu select **Deferred**.
  - 17 Click **Save & Close** .
-  Continue to the next exercise.

### Tech Tip

To delete a task from the task list, select it and press **DELETE**.

## EXERCISE 3-22 (Continued) Create and Modify Tasks

FIGURE 3.49 Task Recurrence dialog box

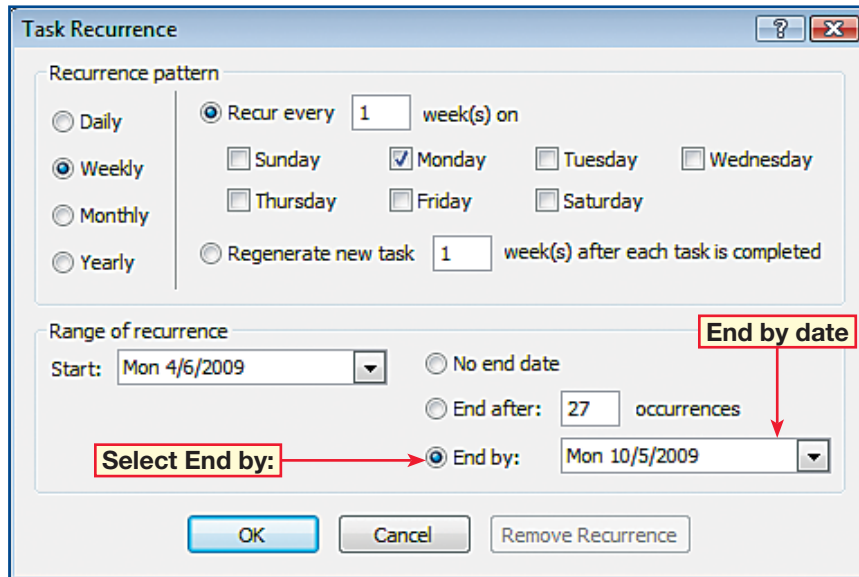
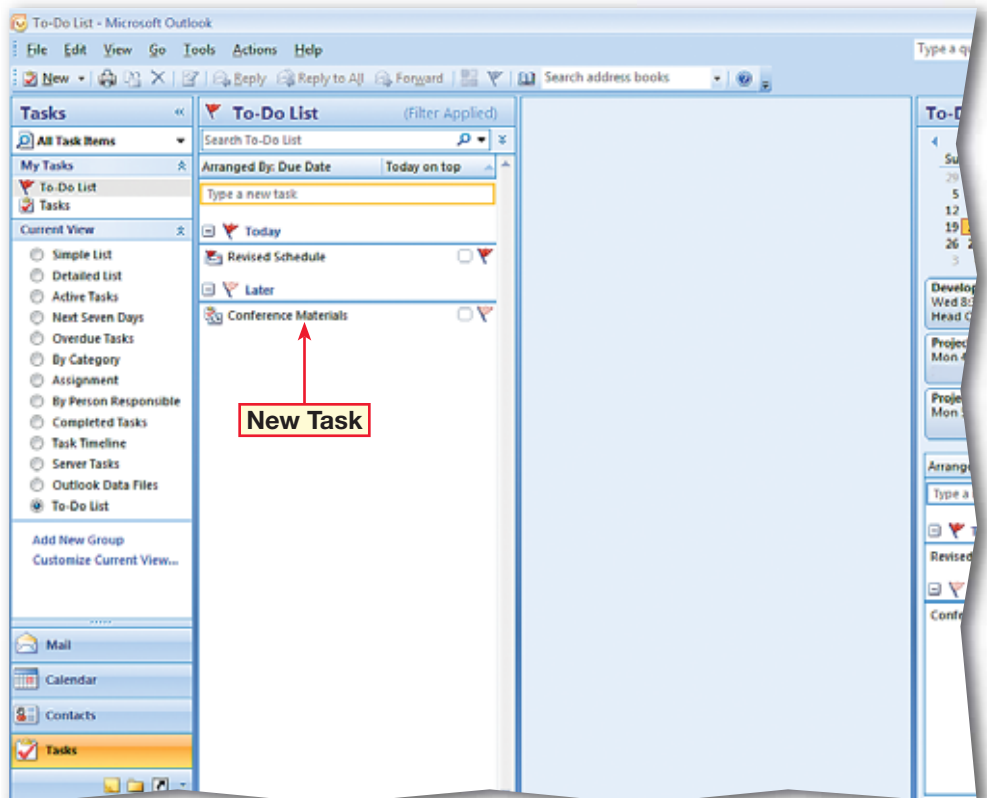




FIGURE 3.50 New task added





## Step-By-Step

- 1 In the **Navigation** pane, click **Mail**.
- 2 In the **Inbox**, select the **Photo Assignments** message.
- 3 In the **Inbox**, right-click the flag icon on the **Photo Assignments** message and select **Next Week**.
- 4 In the **Navigation** pane, click **Tasks**.
- 5 **CHECK** Your screen should look like Figure 3.51.
- 6 Double-click the **Conference Materials** task to open it.
- 7 **CHECK** Your screen should look like Figure 3.52.
- 8 Choose **Task>Options>Private** .
- 9 Click **Save & Close** .

 Continue to the next exercise.

### You Should Know

You can also mark tasks as private if you do not want others to view a task's details.

## EXERCISE 3-23

### Create a Task from an E-mail Message and Label the Task Private

You do not have to be the originator of a task to enter it into Outlook. If a coworker e-mails a task, you can enter it into the Outlook task list and flag it for completion.

FIGURE 3.51 New task added from e-mail

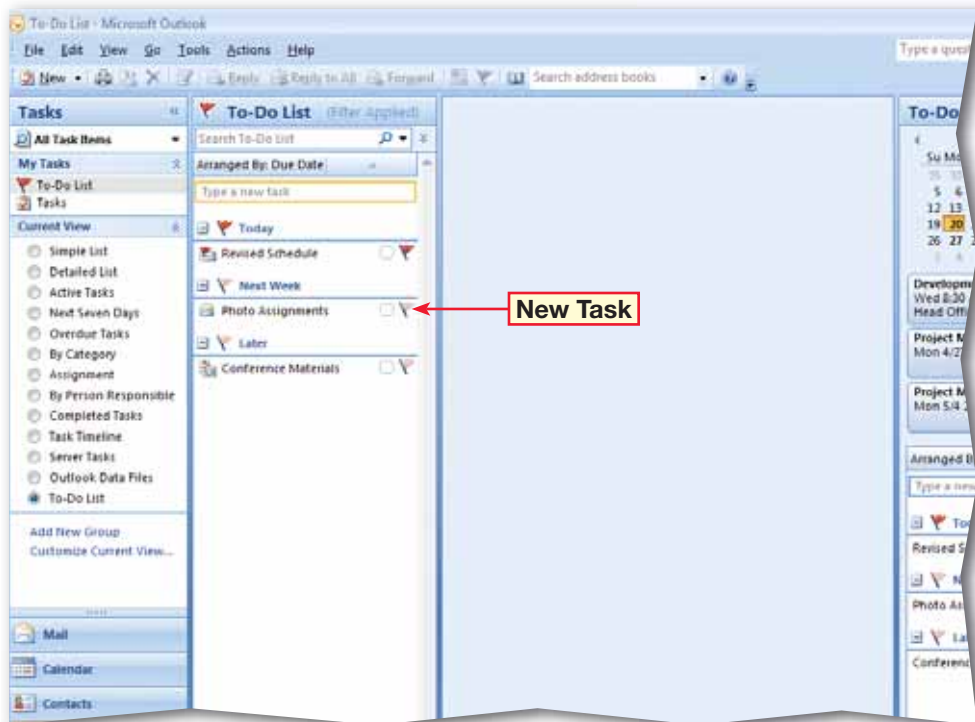
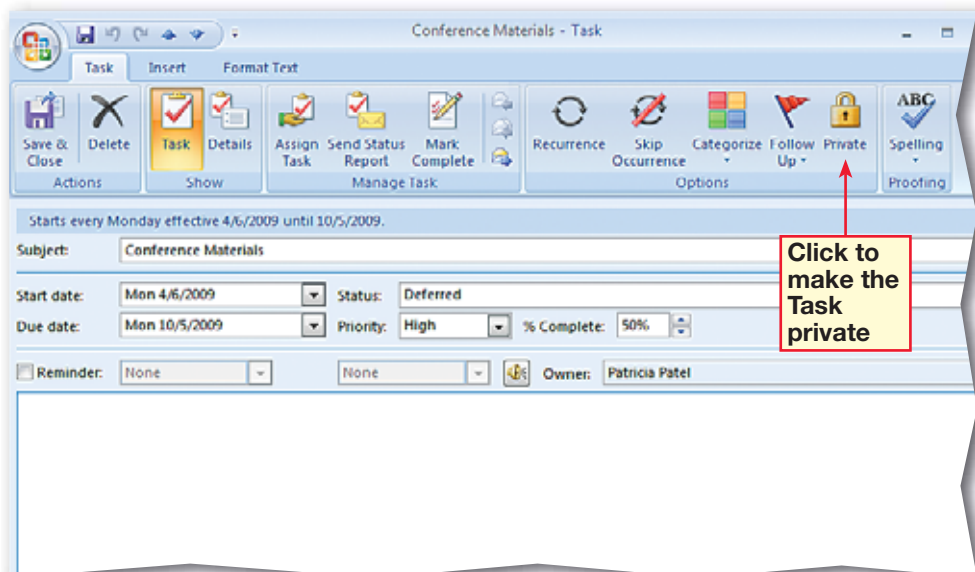


FIGURE 3.52 Conference Materials task



## Step-By-Step

- 1 In the **Tasks** pane under **My Tasks**, click **To-Do List**.
- 2 In the **To-Do List** in the **Photo Assignments** task, click the flag icon to mark the task complete.
- 3 On the **Standard toolbar**, click **New Task**.
- 4 In the **Subject** box, key: **Conference Schedule**.
- 5 Click the **Due date** drop-down arrow and select the next **Thursday** in the Calendar.
- 6 Click the **Start date** drop-down arrow and click today's date.
- 7 Choose **Task>Manage Task>Assign Task**.
- 8 **CHECK** Your screen should look like Figure 3.53.
- 9 In the **To** box, key the e-mail address provided by your teacher. Click **Send**.
- 10 **CHECK** Your screen should look like Figure 3.54.

➔ Continue to the next exercise.

## EXERCISE 3-24

### Assign Tasks and Label Tasks as Complete

When you create a task, you are the owner of that task. If you **assign** the task to another person, that person becomes the owner. Only the owner can modify a task. Icons in the Tasks list indicate whether a task is assigned or unassigned. When you have completed a task, you can mark the task as complete. Others can see the status of the task and can schedule new tasks accordingly.

FIGURE 3.53 Assign Task window

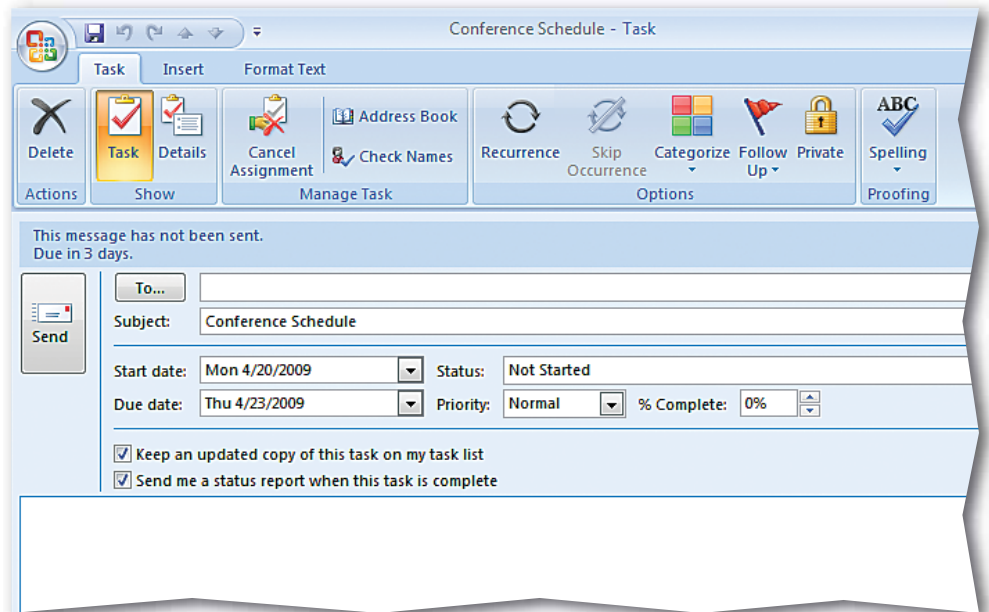
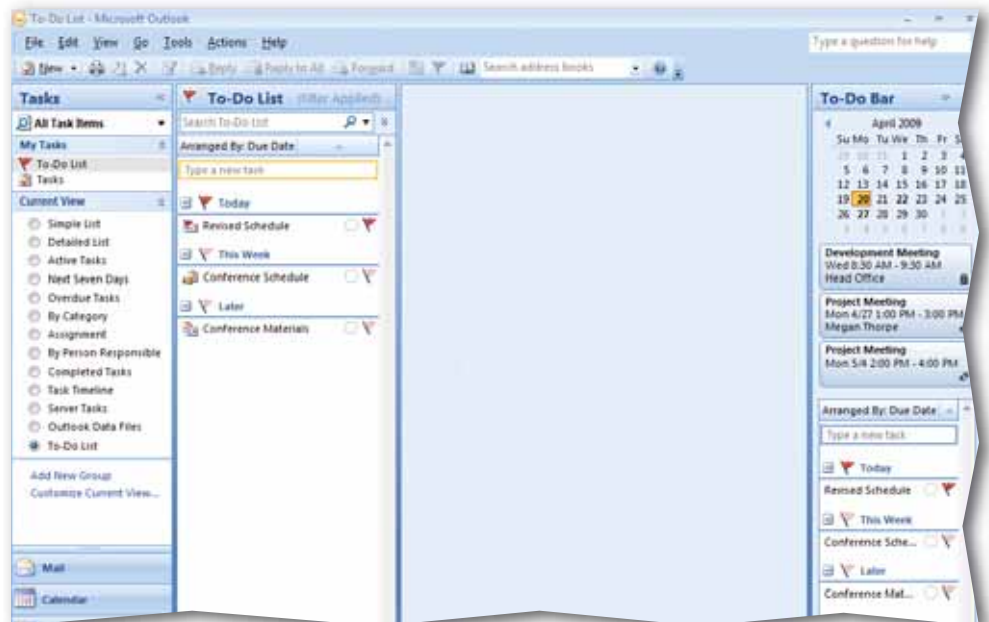





FIGURE 3.54 Conference Schedule task assigned



## Step-By-Step

- 1 In the **Navigation** pane, click **Mail**. In your Inbox, double-click the **Conference Hotel Reservations** e-mail that contains the task request.
- 2 **CHECK** Your screen should look like Figure 3.55.
- 3 In the request, choose **Task>Respond> Decline** .
- 4 In the **Declining Task** dialog box, select **Edit the response before sending** and click **OK**.
- 5 In the message body, key: **I have a previous assignment that covers that time.** Click **Send**.
- 6 Open the **Conference Flight Details** message. Choose **Task>Respond> Accept** . Click **OK**.
- 7 In the **Navigation** pane, click **Tasks**. Double-click the **Conference Flight Details** task.
- 8 **CHECK** Your screen should look like Figure 3.56.
- 9 Choose **Task>Manage Task>Assign Task** . In the **To** box, key the e-mail address assigned by your teacher. Click **Send**.

 Continue to the next exercise.

## EXERCISE 3-25

### Decline and Delegate Tasks

Once you have received a proposed task assignment, you may accept or decline that task. You also can decide to reassign, or **delegate**, that task to someone who can complete it for you.



FIGURE 3.55 Conference Hotel Reservations message

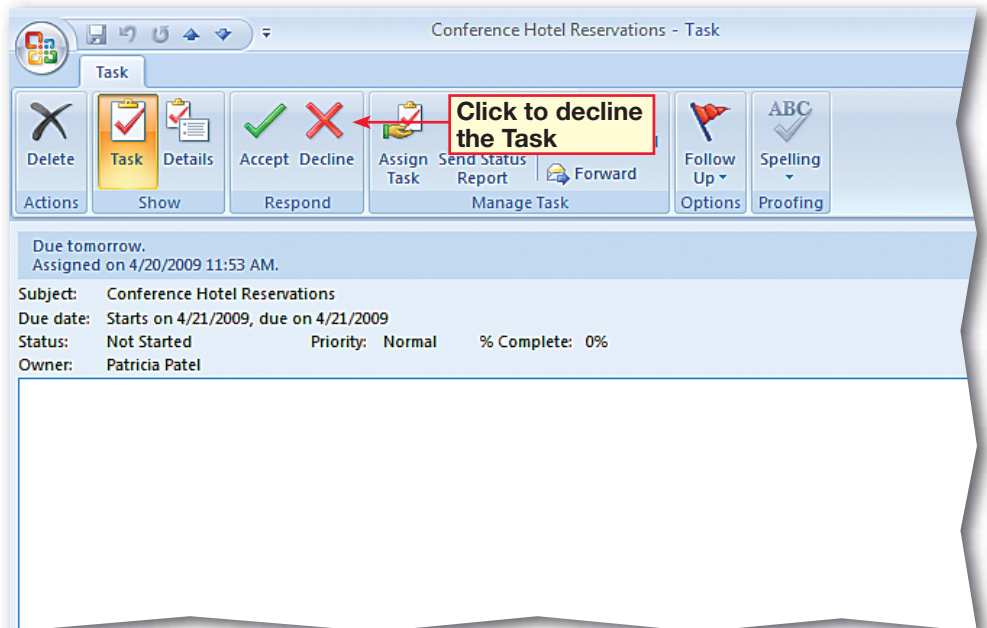
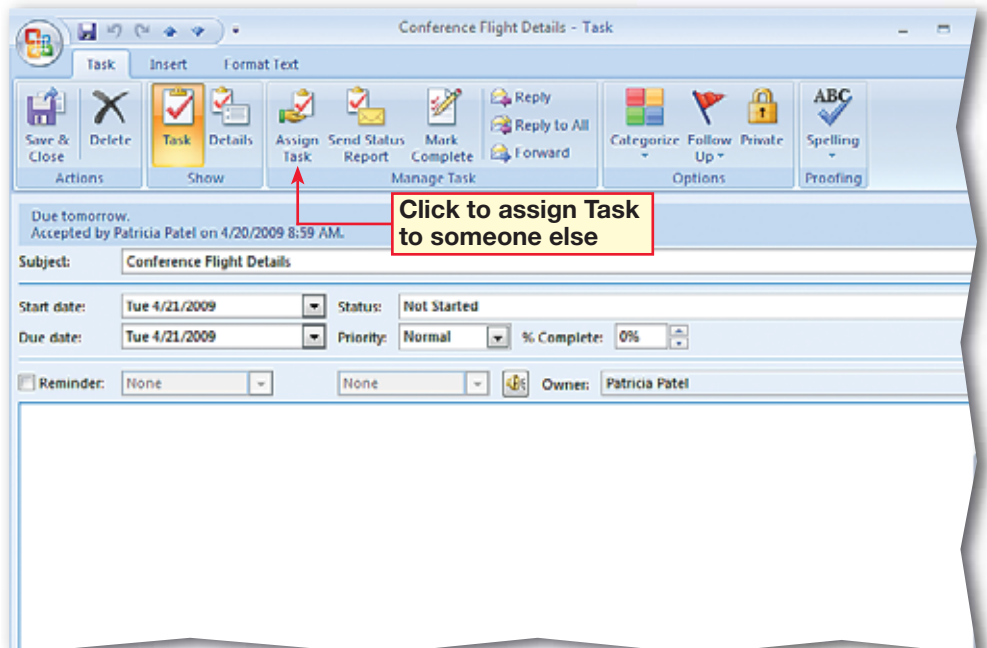


FIGURE 3.56 Conference Flight Details task



## Step-By-Step

- 1 In your **Inbox**, open the **Conference Schedule** task that was e-mailed to you by a classmate.
- 2 In the **Conference Schedule - Task** window, click **Accept**. Click **OK**.
- 3 In the **Tasks list**, double-click the **Conference Schedule** task to open it.
- 4 **CHECK** Your screen should look like Figure 3.57.
- 5 Choose **Task>Manage Task>Send Status Report**.
- 6 **CHECK** Your screen should look like Figure 3.58.
- 7 In the **To** box, key the name of a classmate assigned by your teacher.
- 8 Click **Send**.
- 9 Close the **Conference Schedule** task.

➔ Continue to the next exercise.

### You Should Know

The **Status** and **% Complete** values are dependent on each other. If you change the value in one, the value in the other adjusts accordingly.

## EXERCISE 3-26

### Accept a Task and Send a Status Report

Those who assign tasks are likely to want to be updated on your progress during the course of the work. Outlook allows you to send a status report on the progress of a task and e-mail the statistics of the task to the task owner.

FIGURE 3.57 Conference Schedule task

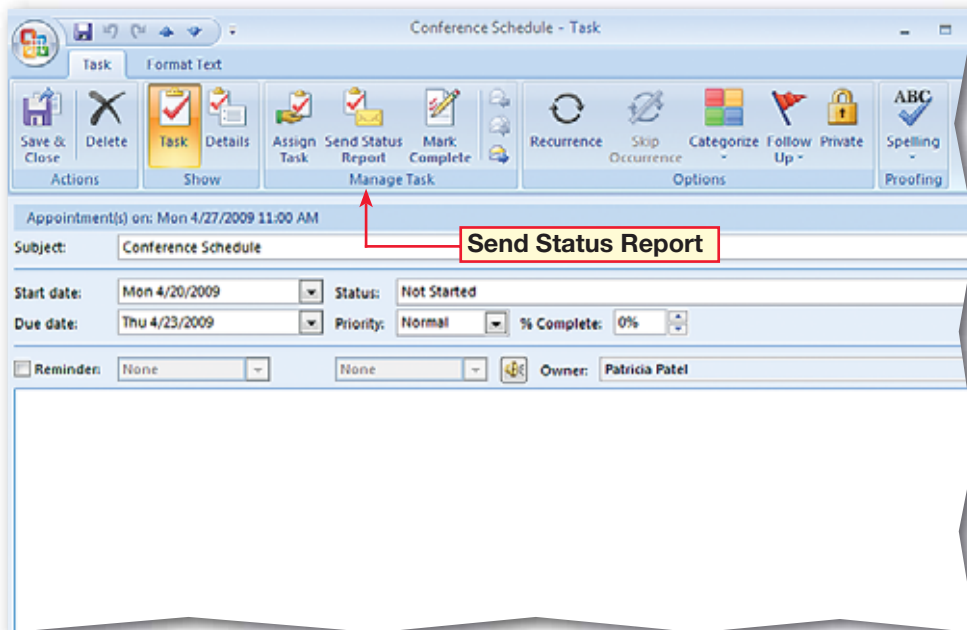
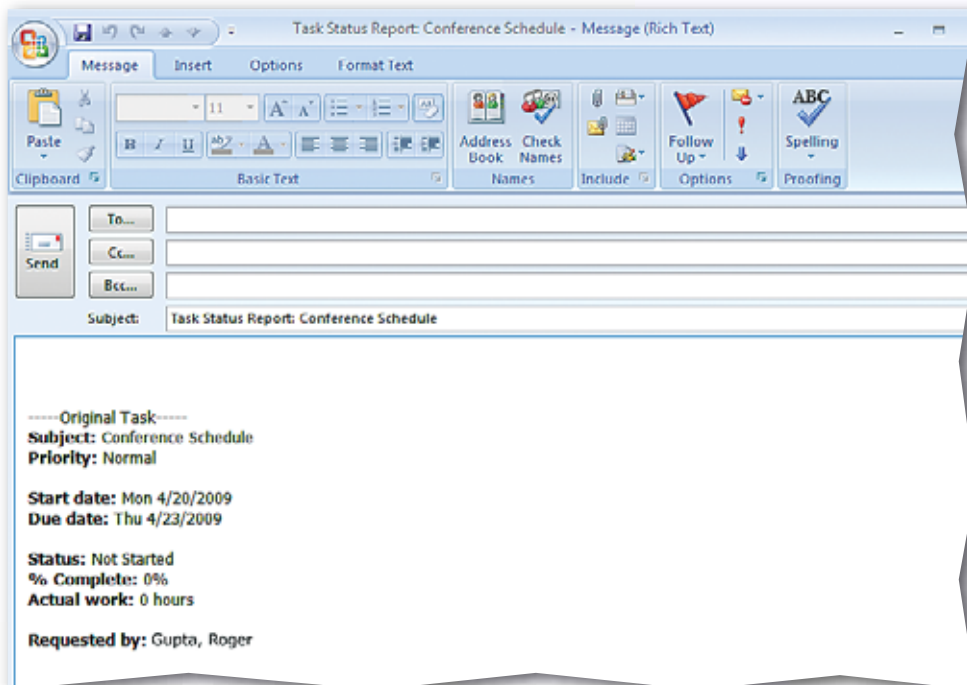


FIGURE 3.58 Conference Schedule Status Report



## Step-By-Step

- 1 In the **Tasks** list, select the **Conference Schedule** task.
- 2 Drag the task to the Calendar in the **To-Do Bar** pane and drop it on the date one week from today.
- 3 **iCHECK** Your screen should look similar to Figure 3.59.
- 4 Click **Save & Close**.
- 5 In the **Navigation** pane, click **Calendar**.
- 6 **iCHECK** Your screen should look similar to Figure 3.60.
- 7 Exit Outlook.

### You Should Know

You can also create a new task by keying it into the **Type a new task** text box in the **To-Do Bar** from any view in Outlook.

## EXERCISE 3-27

### Create a Meeting from a Task

In addition to sending status reports, you might want to meet face-to-face or in a conference call with the owner of the task on which you are working. You can create meetings, appointments, or events from tasks in Outlook.

FIGURE 3.59 Conference Schedule Appointment window

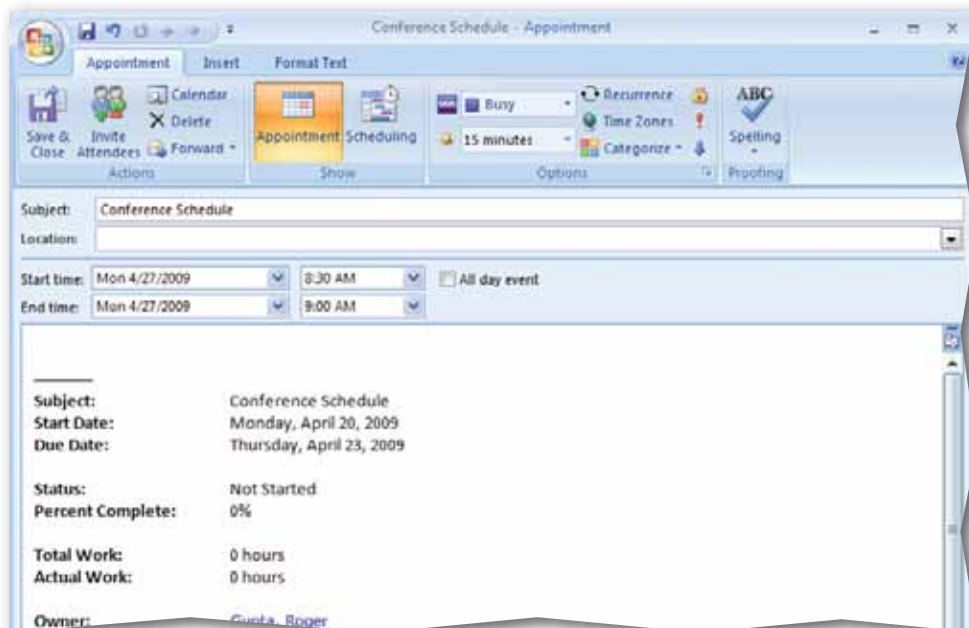
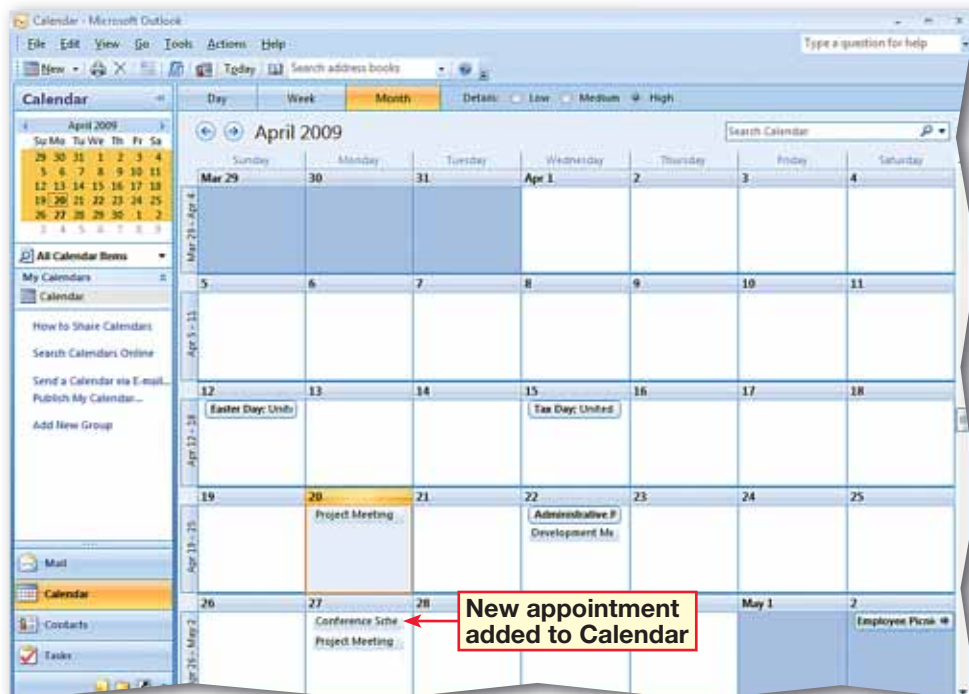


FIGURE 3.60 Calendar view with Conference Schedule appointment





## Vocabulary

### Key Terms

appointment

assign

attendee

Calendar

delegate

event

meeting

meeting request

Overlay Mode

resource

task

Task list

tentative

### Academic Vocabulary

generate

mandatory

priority

suggest

### Review Vocabulary

Complete the following statements on a separate piece of paper. Choose from the Vocabulary list on the left to complete the statements.

1. Appointments can be flagged with different levels of \_\_\_\_\_.  
(p. 83)
2. A(n) \_\_\_\_\_ is an appointment to which you invite others. (p. 62)
3. If you are not sure you can attend a meeting, you should respond as \_\_\_\_\_. (p. 70)
4. Speakerphones, conference rooms, and overhead projectors are all examples of \_\_\_\_\_ used for a meeting. (p. 68)
5. To \_\_\_\_\_ is to pass along a task for another person to do it. (p. 87)

### Vocabulary Activity

6. Create a memory game using the vocabulary words and definitions.
  - You will need 14 small (approximately 3" × 5") pieces of paper.
  - Write seven vocabulary words on separate pieces of paper. Write the definition for each word on the remaining seven pieces of paper.
  - Keep the definitions in one group and the vocabulary words in another group. Turn the paper face down. Mix the papers in each group.
  - With a classmate, take turns turning over a word and a definition. If you pick the wrong definition, return the papers and go to the next player. If you pick the right definition, keep both pieces of paper. The player with the most complete definitions wins.

### Review Key Concepts

Answer the following questions on a separate piece of paper.

7. Which of the following is NOT a Calendar view? (p. 60)
 

A. Day	C. Month
B. Week	D. Year
8. Which button would you click if you cannot attend a meeting at the suggested time but would like to suggest another time? (p. 71)
 

A. Accept	C. Propose New Time
B. Decline	D. Tentative
9. Which group would you look under to cancel a meeting? (p. 69)
 

A. Edit	C. Delegate
B. Actions	D. Tools
10. The group of tasks displayed in the Tasks folder is called what? (p. 83)
 

A. Task list	C. Task journal
B. TaskPad	D. Task icons

## Step-By-Step

- 1 Start Outlook. In the **Navigation** pane, click **Calendar**. In **Calendar** view, click **Week**.
- 2 **CHECK** Your screen should look like Figure 3.61.
- 3 Choose **File>New>Meeting Request**.
- 4 In the **To** box, key the e-mail address assigned by your teacher.
- 5 In the **Subject** box, key: **Conference Call**. In the **Location** box, key: **Meeting Room**.
- 6 Click the **Start time** date drop-down arrow. Click **Today**.
- 7 Click the **Start time** drop-down arrow and select today's date.
- 8 Click the **End time** drop-down arrow. Select **5:00 PM**. Click **Send**.
- 9 **CHECK** Your screen should look similar to Figure 3.62.
- 10 Exit Outlook.

## 1. Switch Calendar Views and Add a Meeting

Follow the steps to complete the activity.

FIGURE 3.61 Week view in Calendar

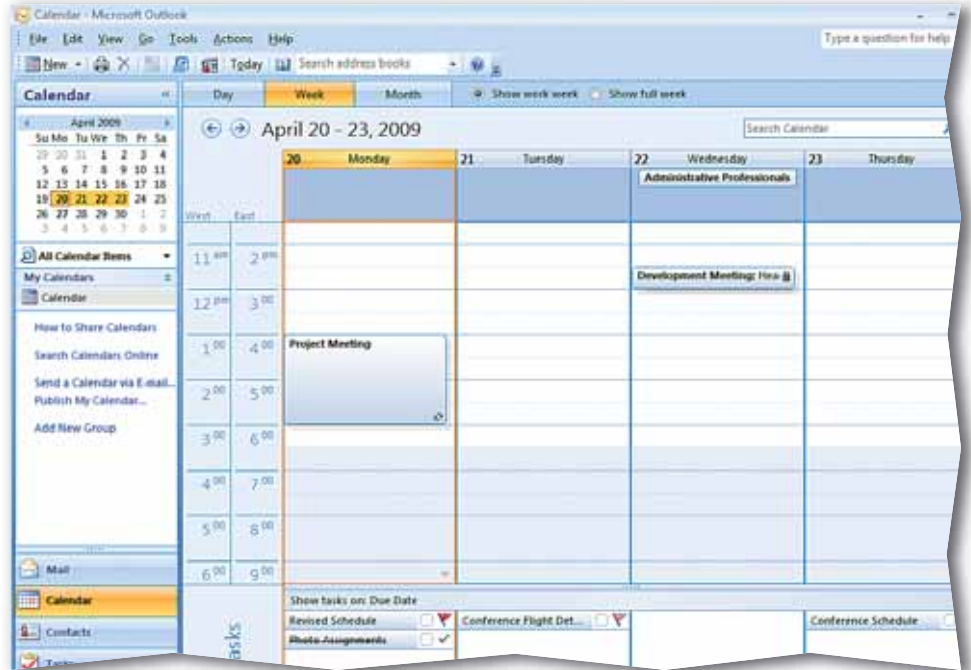
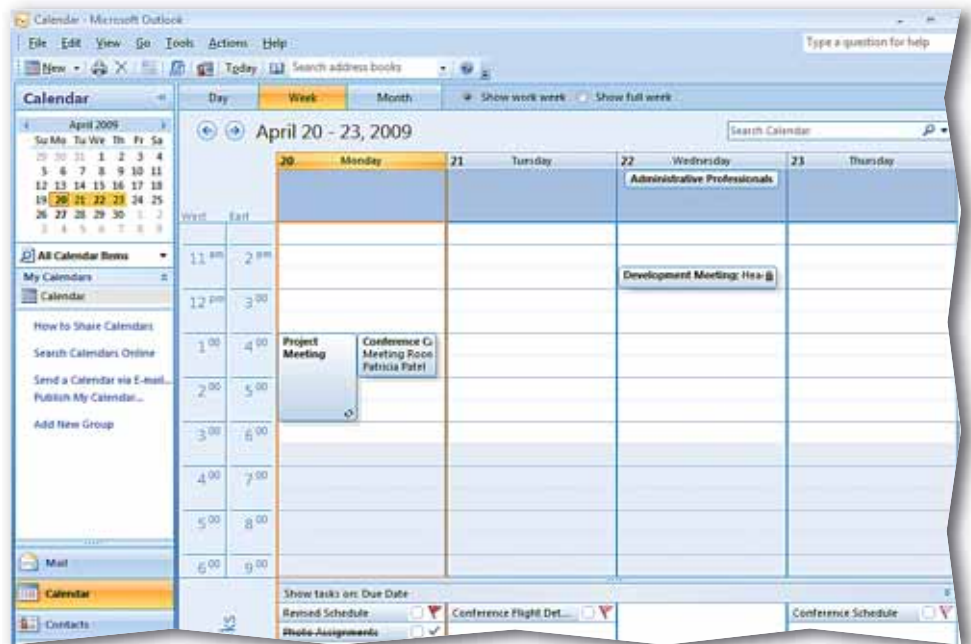





FIGURE 3.62 Conference Call scheduled



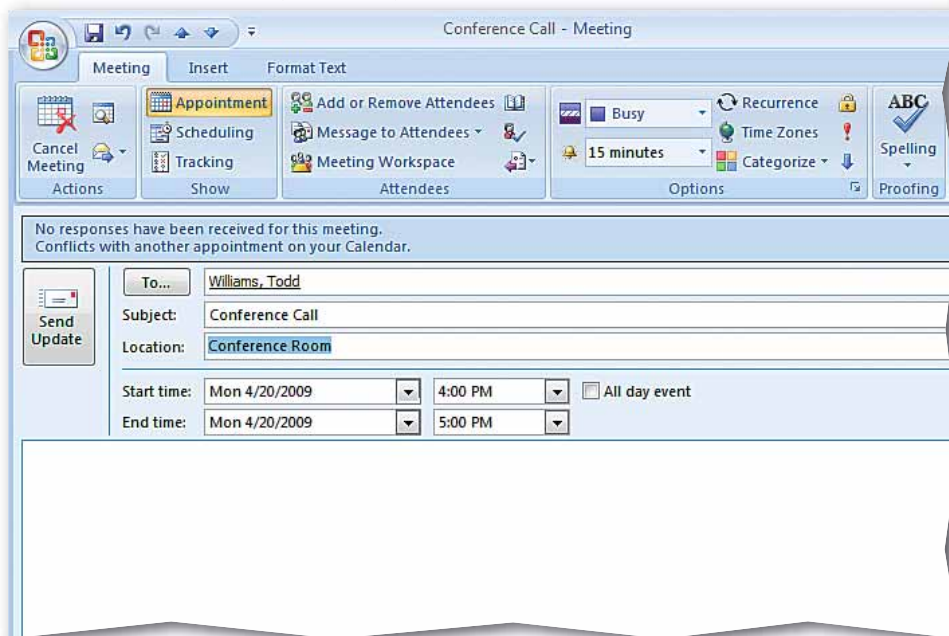
## Step-By-Step

- 1 In the **Calendar**, double-click **Conference Call**.
- 2 In the **Meeting** request, click the **Location** drop-down arrow. Click **Conference Room**.
- 3 **CHECK** Your screen should look similar to Figure 3.63.
- 4 Click in the message area.  
Key: **The conference call has been moved.**
- 5 Click **Send Update** .
- 6 On the **Calendar**, double-click the **Conference Call**. Choose **Meeting>Actions>Cancel Meeting** .
- 7 Delete **The conference call has been moved.**  
Key: **The conference call is canceled until further notice.**
- 8 Click **Send** .
- 9 **CHECK** Your screen should look like Figure 3.64.
- 10 Exit Outlook.

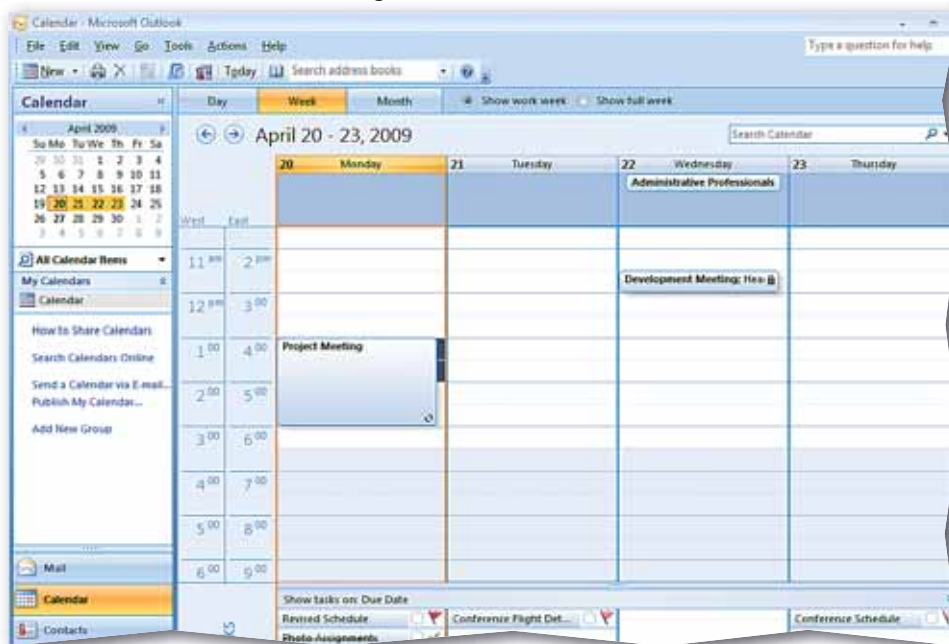
## 2. Update and Cancel a Meeting

Follow the steps to complete the activity. You must complete Practice It Activity 1 before doing this activity.

**FIGURE 3.63** Updating a meeting







**FIGURE 3.64** Canceled meeting





## Step-By-Step

- 1 In the **Navigation** pane, click **Tasks**. Click **New Task** .
- 2 In the **Subject** box, key: **Conference PowerPoint Presentation**.
- 3 Click the **Due date** drop-down arrow. Select two days from today. Click the **Start date** drop-down arrow. Select today's date.
- 4 **CHECK** Your screen should look similar to Figure 3.65.
- 5 Click **Save & Close** .
- 6 In the **Tasks** list, double-click the **Conference PowerPoint Presentation**.
- 7 Choose **Task>Manage Task>Assign Task** .
- 8 **CHECK** Your screen should look like Figure 3.66.
- 9 In the **To** box, key the e-mail address assigned by your teacher. Click **Send** .
- 10 Exit Outlook.

## 3. Create, Modify, and Assign Tasks

Follow the steps to complete the activity.

FIGURE 3.65 New task

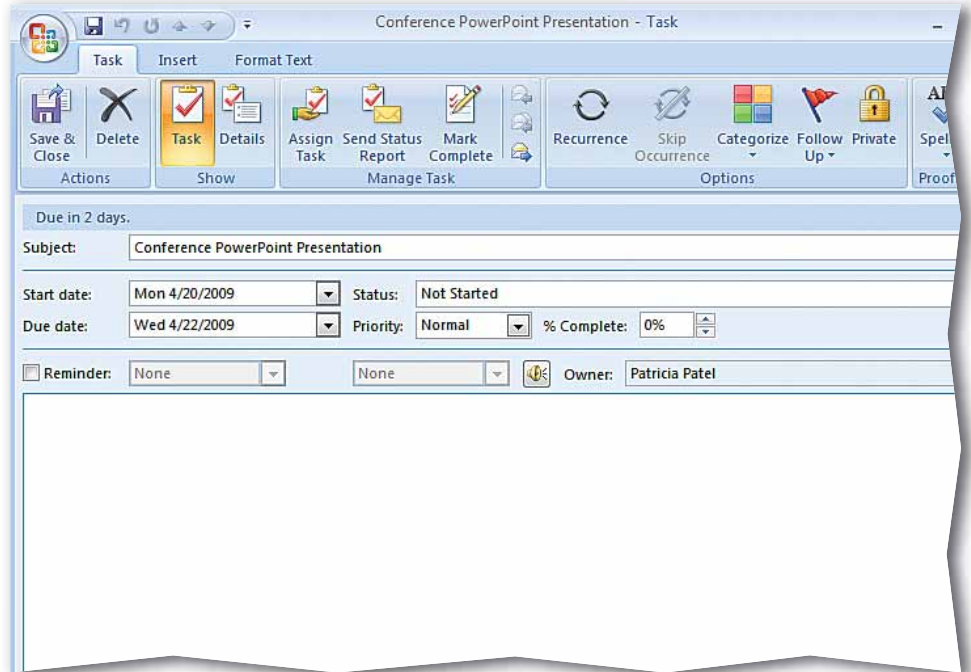
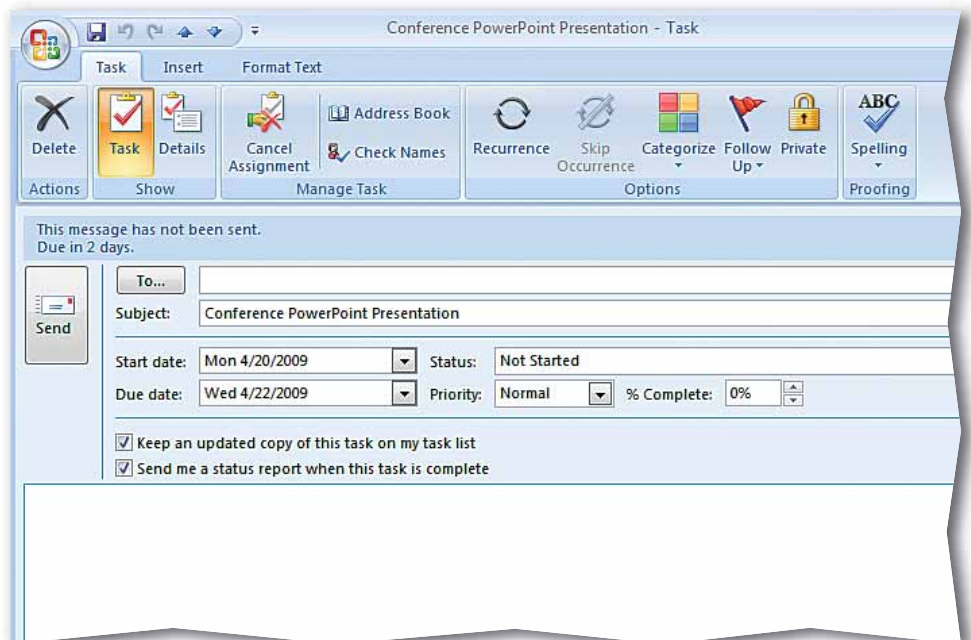




FIGURE 3.66 Assigning a task



## Step-By-Step

- 1 Open your Outlook **Calendar**. Locate and open the data file **Dates.xlsx**.
- 2 Click **New Appointment** . In the **Subject** box, key: **Los Angeles**.
- 3 Enter the concert's **Start time** (July 4, 7:30 PM) and **End time** (10:30 PM).
- 4 **CHECK** Your screen should look like Figure 3.67.
- 5 Click **Save & Close** .
- 6 Repeat Steps 2 through 5 for the three other cities on the tour.
- 7 Create a **New Meeting Request** for July 4 at 8:30 AM. In the **Subject** line, key: **Morning Radio Show**. Send it to the e-mail address assigned by your teacher.
- 8 In the **Calendar**, switch to **Month** view. Select **July**.
- 9 **CHECK** Your screen should look like Figure 3.68.
- 10 Exit Outlook.

## 4. Schedule a Tour



You have been hired to promote the latest pop music group. You must create a tour schedule for the band. You also need to set up meetings with local radio stations. You decide to use Outlook for all of these tasks.

FIGURE 3.67 Adding tour dates

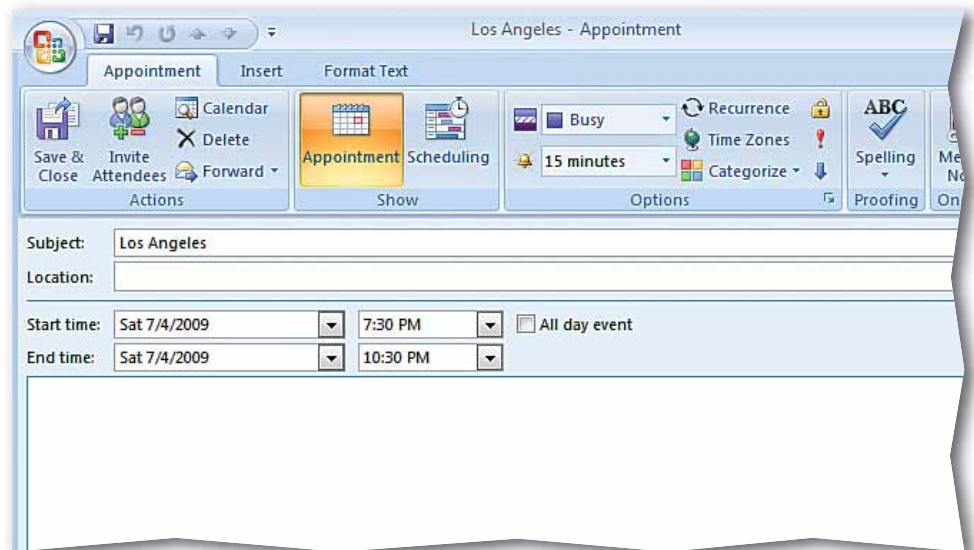
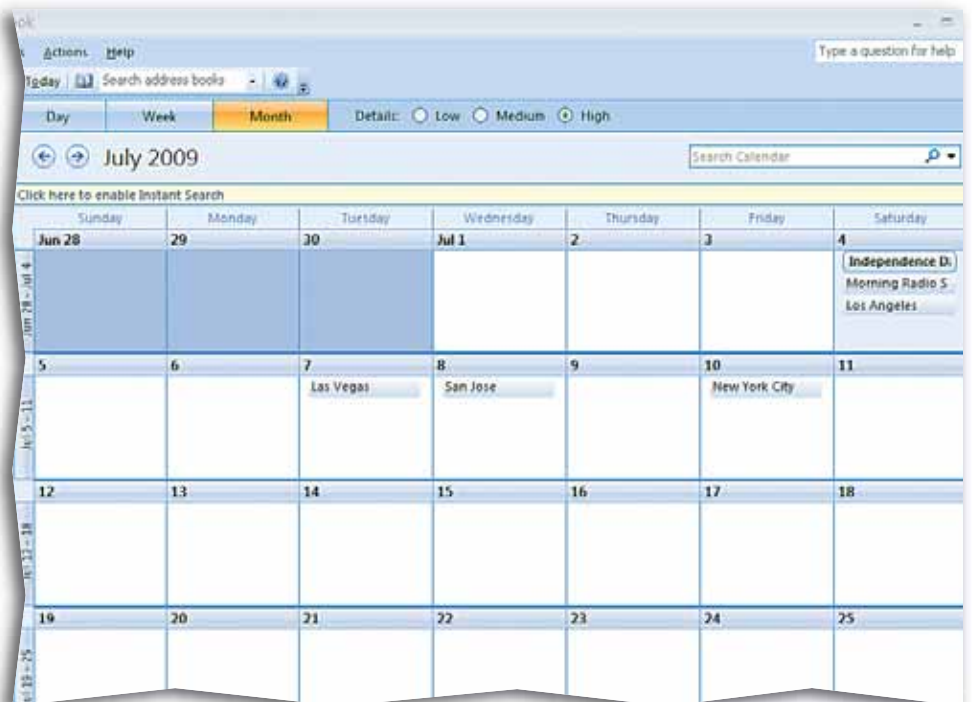



FIGURE 3.68 Dates and appointments



## Step-By-Step

- 1 In the **Navigation** pane, click **Tasks**. Click **New Task** .
- 2 Key the first task name (**Hotel Reservations**) as the **Subject**.
- 3 Locate and open the **Tasks.xlsx** data file.
- 4 Use the information in the data file to add the task's **Due date** (June 10) and **Start date** (June 1).
- 5 **CHECK** Your screen should look like Figure 3.69.
- 6 Click **Save & Close** .
- 7 Create two new tasks from the data file.
- 8 In Outlook, assign and send the tasks to the e-mail address assigned by your teacher.
- 9 **CHECK** Your screen should look similar to Figure 3.70.
- 10 Exit Outlook.

## 5. Create and Assign Tasks



You are preparing for your pop group's upcoming tour. As part of your preparation, you need to assign several tasks, such as making hotel reservations, designing concert T-shirts, and buying radio ads to promote the tour. You decide to use Outlook to assign these tasks.

FIGURE 3.69 Creating a task

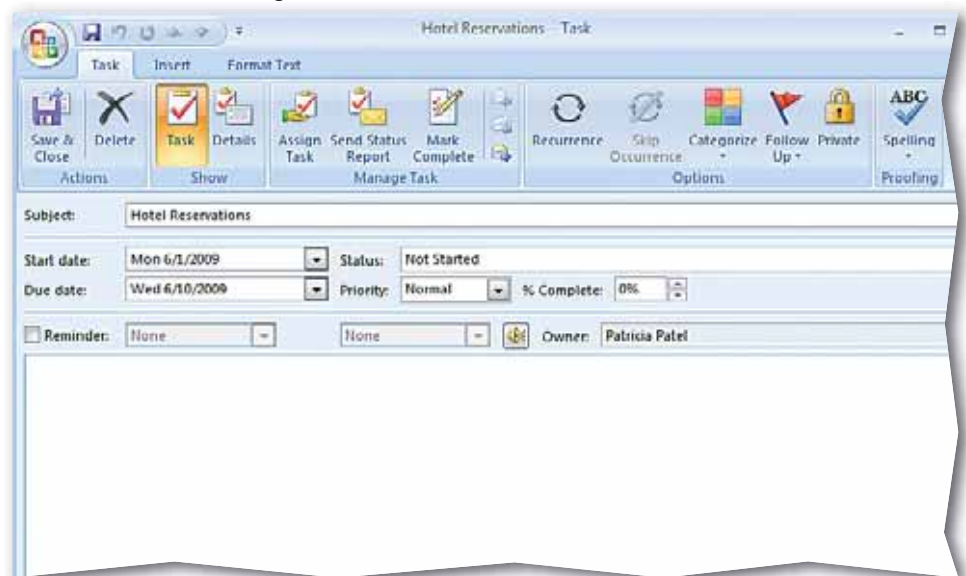
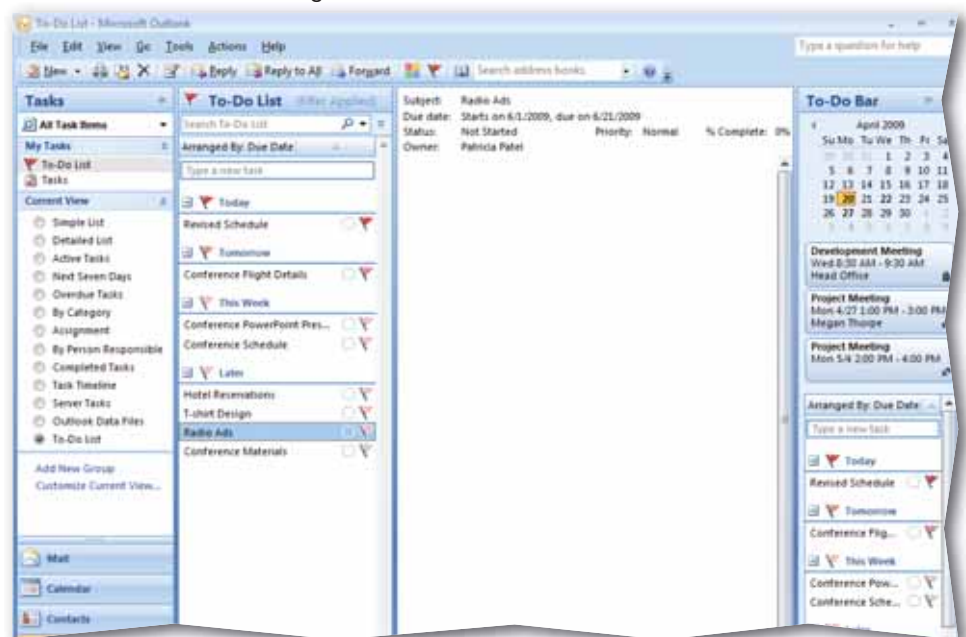


FIGURE 3.70 List of assigned tasks



### 6. Beyond the Classroom Activity



**Language Arts: Schedule Activities** Your class has been chosen to participate in a NASA satellite project. As part of the project, you are expected to attend meetings about the development of a new satellite that will be launched in December of next year. Use the Outlook Calendar to schedule the following activities over the next two-week period:

- A three-hour project launch meeting
- An appointment to pick up the chief electrical engineer from the airport
- A two-week training event about satellite stabilizers

With your teacher's permission, **Print** a copy of your Calendar in **Month** view. Make sure you enter the print range for the current month. Open a Word document and key a paragraph about the importance of tracking long-term projects with multiple components. Save your file as: **orev3-[your first initial and last name]6**.

### 7. Standards at Work Activity



#### Microsoft Certified Application Specialist Correlation

#### Outlook 2.4 *Customize Calendar Settings*

**Change Calendar Options** Last Tuesday, you started working the evening shift. You need to customize Outlook for your new schedule.

- Your work week is Tuesday through Saturday from 3:00 PM to 11:00 PM.
- Change the Calendar options in your Calendar so that **Week** view displays your new work hours. (Hint: Choose **Tools>Options**. Then click **Calendar Options**.)

With your teacher's permission, print a copy of your Calendar in **Month** view. Make sure you enter the print range for the current month.

### 8. 21st Century Skills Activity

**Follow a Schedule** Creating a schedule is not very difficult. However, following the schedule can be difficult. Use Outlook to create a schedule for one week. Include activities inside and outside of school, such as band rehearsal, basketball practice, babysitting, chores, and study time.

After creating the schedule, see if you can stick to it for the entire week. With your teacher's permission, print a copy of your Calendar in **Month** view. Make sure you enter the print range for the current month.

**Before You Begin**

**Scheduling** A large part of organization is managing your time. Keeping meetings, tasks, and appointments on schedule for yourself and being aware of the schedules of others will help you become more efficient at juggling multiple tasks.

**Reflect** Once you complete the projects, open a new Word document and answer the following questions:

1. What tasks could you create each day that you currently do not plan for?
2. Why is it important to plan your schedule in advance?
3. How can a good plan help to improve your performance at school or work?

**9. Planning a Movie**

**Language Arts: Send a Meeting Request** You are on the film crew of a movie. The producer could not get a permit for shooting a scene in River Park next week, so you need to get a permit for Black Rock Park.

- Request a meeting with the Director of the City Filming Office and the Director of Parks to discuss the permit.
- Use the e-mail addresses provided by your teacher. When setting the dates and times, remember that the scene must be shot next week!

Open a Word document and key a paragraph that explains the difference between mandatory and optional attendees. Why type of attendees did you send this meeting request to? Saved the document as: **orev3-[your first initial and last name]9**.

**10. Lights, Camera, Action**

**Language Arts: Schedule Appointments** As the director's assistant, you help to plan the director's day. Schedule the following appointments for the director. Set the appointments to occur within a one-week period.

- Determine budget with the producer.
- Negotiate salary with the lead actor.
- Meet with the costume designer.
- Have a conference call with the special effects team.

Add each appointment to your Outlook Calendar. With your teacher's permission, print a copy of your Calendar in **Month** view. Make sure you enter the print range for the current month. Open a Word document and describe how you can turn an appointment into a meeting. Save your document as: **orev3-[your first initial and last name]10**.

**11. So Much to Do!**

**Language Arts: Create and Assign Tasks** You have one week to finish shooting a scene on location in St. Louis. Here is your checklist:

- Order food from the caterers.
- Do an equipment inventory.
- Find out if the props person knows your location.
- Make sure you have a permit for filming downtown.

Create and assign the tasks to e-mail addresses provided by your teacher. Identify each task's priority. Open a Word document and explain which task has the highest priority. Save as: **orev3-[your first initial and last name]11**.



## Key Concepts

- Use distribution lists for contacts
- Sort items
- Organize items using colors, views, and rules
- Create folders and archive items
- Use search tools

## Standards

The following standards are covered in this lesson. Refer to pages xxiv and 715 in the Student Edition for a description of the standards listed here.

## ISTE Standards Correlation

## NETS•S

2a, 2b, 2d, 4a, 4b, 4c, 5a, 5b, 6a, 6c

## Microsoft Certified Application Specialist Standards

## Outlook

1.1, 4.3, 4.4, 5.1, 5.2, 5.3, 5.4, 5.5, 5.6

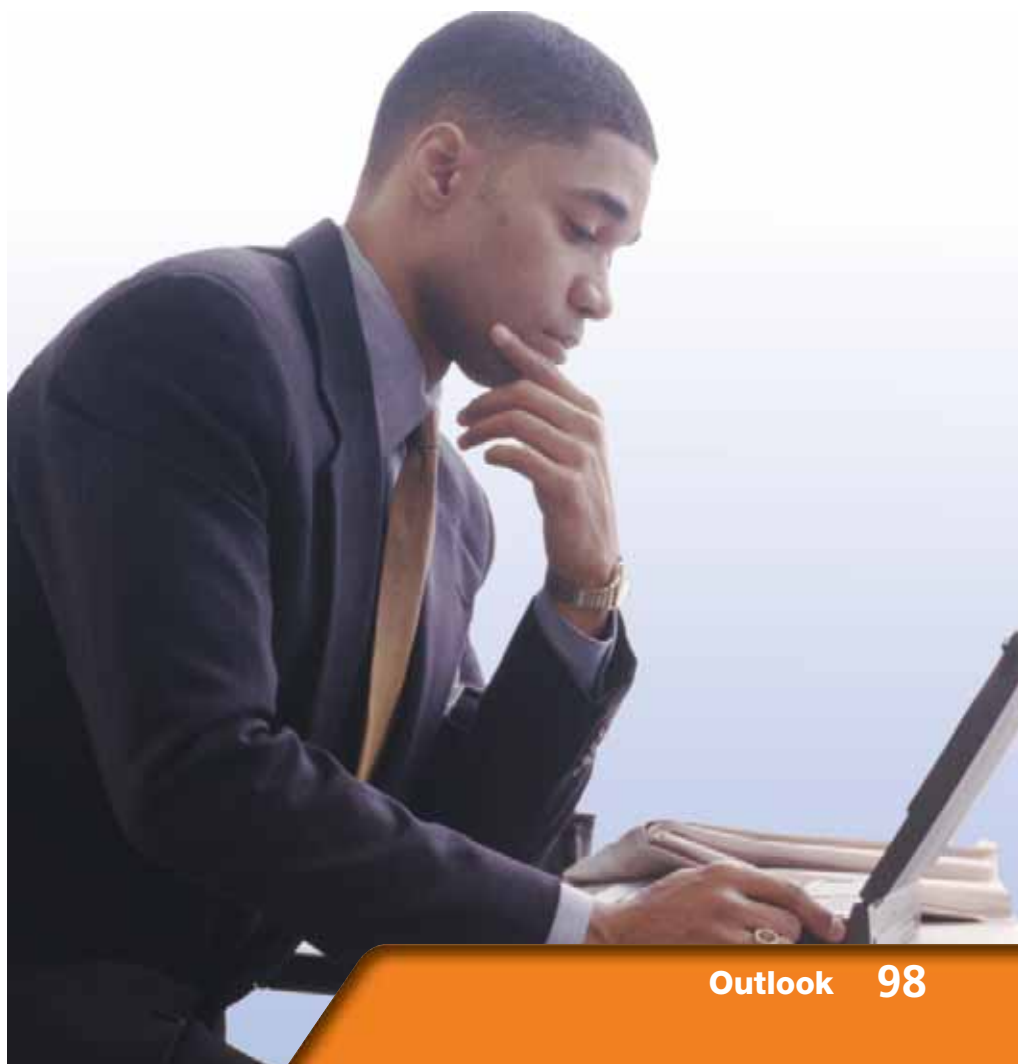


Picture your room at home. Is it messy or neat? Does it take you a long time to clear a space for studying, or to find socks that match? Although getting organized may seem like an overwhelming task, it will save you time in the long run. In this lesson, you will learn how to use different tools in Outlook to help you to organize.

## 21st CENTURY SKILLS

**Develop Organizational Skills** Think of a time when you felt very disorganized. Perhaps your desk or locker was overflowing with papers. Maybe your teacher asked you for your homework, and you could not find it. The time and effort you spent trying to find what you needed could have been better spent doing something else. Being organized saves time and makes you more effective at whatever you do.

*What is one thing you could do to become more organized?*





## Before You Read

**Check for Understanding** Having questions when you read means that you are checking your understanding of the material. Improve your comprehension by taking notes as you read. After you have finished the lesson, use your notes to help answer your questions.

### Read To Learn

- Create rules to handle e-mail related tasks automatically.
- Create separate folders for specific e-mail messages and search folders for virtual copies.
- Learn to color-code, categorize, and prioritize messages.

### Main Idea

Hone your Outlook skills with advanced techniques for organizing and categorizing e-mail messages.

### Vocabulary

#### Key Terms

AutoArchive  
category  
distribution list  
message format  
rule  
search folder

### Academic Vocabulary

These words appear in your reading and on your tests. Make sure you know their meanings.

determine  
distinguish  
enable

### Quick Write Activity



**Describe** On a separate sheet of paper, write down three recurring events in school that could be tracked using Outlook's Calendar function. Why is it important to track these events? How might you use Outlook to help you track and categorize the messages related to each event?

### Study Skill





**Avoid Procrastination** Sometimes we put off tasks because they are overwhelming or difficult. Try tackling the most difficult material or task first, so you do not dread what is to come.

## Academic Standards

### English Language Arts

- NCTE 3** Apply strategies to interpret texts.
- NCTE 4** Use written language to communicate effectively.
- NCTE 5** Use different writing process elements to communicate effectively.
- NCTE 8** Use information resources to gather information and create and communicate knowledge.

## Step-By-Step

- 1 Start Outlook. In the **Navigation** pane, click **Contacts**.
- 2 On the **Menu** bar, choose **File>New>Distribution List** .
- 3 In the **Distribution List** dialog box, in the **Name** box, key: **Billing Team**.
- 4 Choose **Distribution List>Members>Select Members** .
- 5 Select one contact. Press and hold **CTRL** and select a second and third contact. Click **Members**. Click **OK**.
- 6 **CHECK** Your screen should look like Figure 4.1.
- 7 Click **Save & Close** .
- 8 In the **Contacts** pane, double-click the **Billing Team** contact.
- 9 Select the first contact in the list. Choose **Distribution List>Members>Remove** .
- 10 **CHECK** Your screen should look like Figure 4.2.

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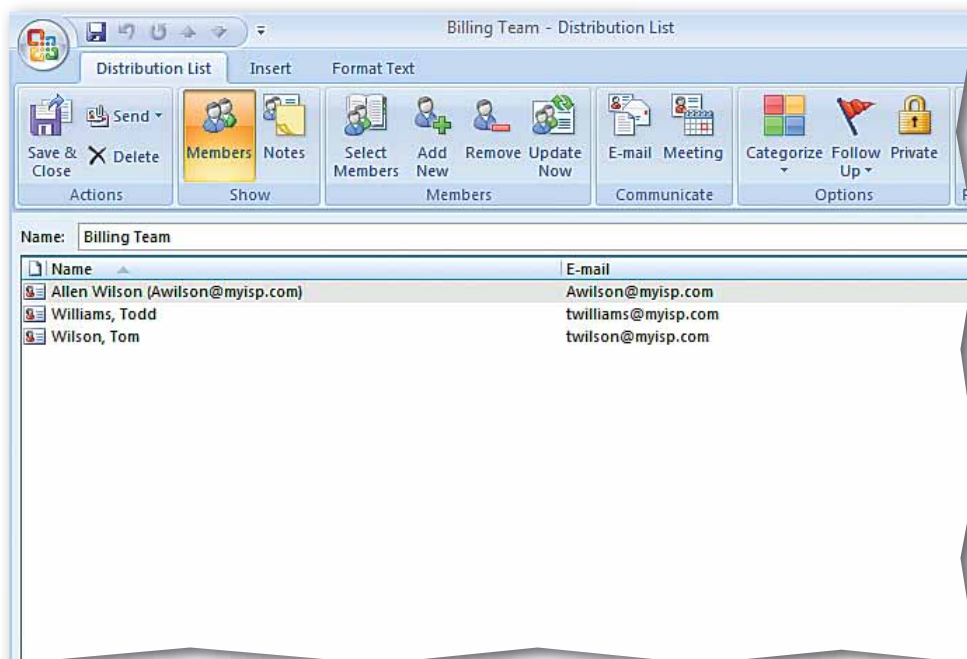
## EXERCISE 4-1

### Create and Modify a Distribution List

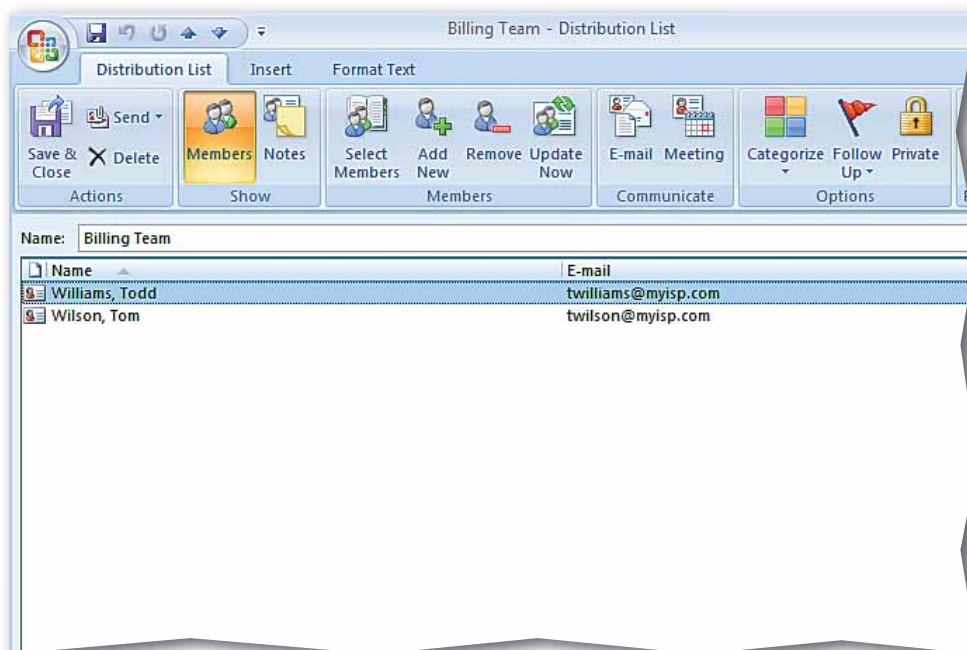


If you often send e-mail to the same group of people, create a **distribution list**. A distribution list groups different e-mail addresses under one list name. When you send a message to the list, each person included in the group will receive it.

**FIGURE 4.1** Billing Team Distribution List window



**FIGURE 4.2** Modified Distribution List





## Step-By-Step

- 11 Double-click the first name in the Billing Team list.
- 12 Select the contact's e-mail address. Key: `toddwilliams@myisp.com` (see Figure 4.3).
- 13 Click **Save & Close**.
- 14 In the **Distribution List**, choose **Distribution List>Members>Update Now**.
- 15 **CHECK** Your screen should look similar to Figure 4.4.
- 16 If necessary, repeat Steps 11 through 13 to return your contact's e-mail address to its original form.
- 17 Click **Save & Close**.

Continue to the next exercise.

### Shortcuts

If you have created a message but do not want to send it yet, choose **Office>Save**. The message will be stored in the **Drafts** folder until you are ready to send it to a recipient.

## EXERCISE 4-1 (Continued) Create and Modify a Distribution List

FIGURE 4.3 Modified e-mail address

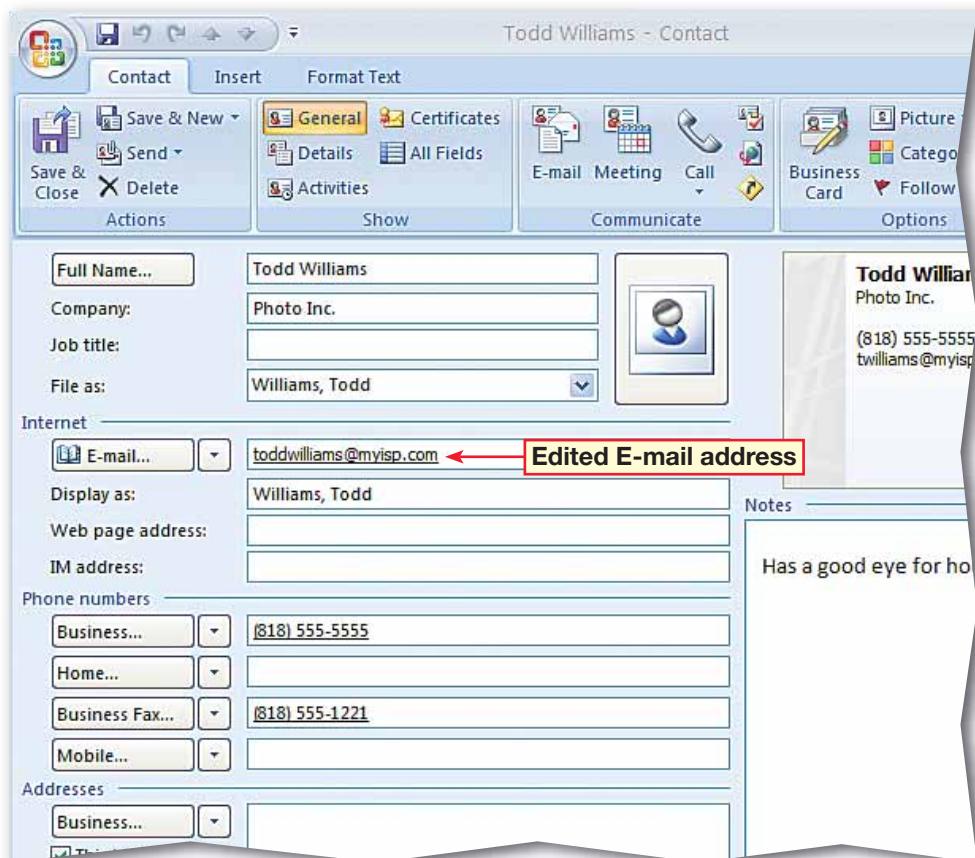
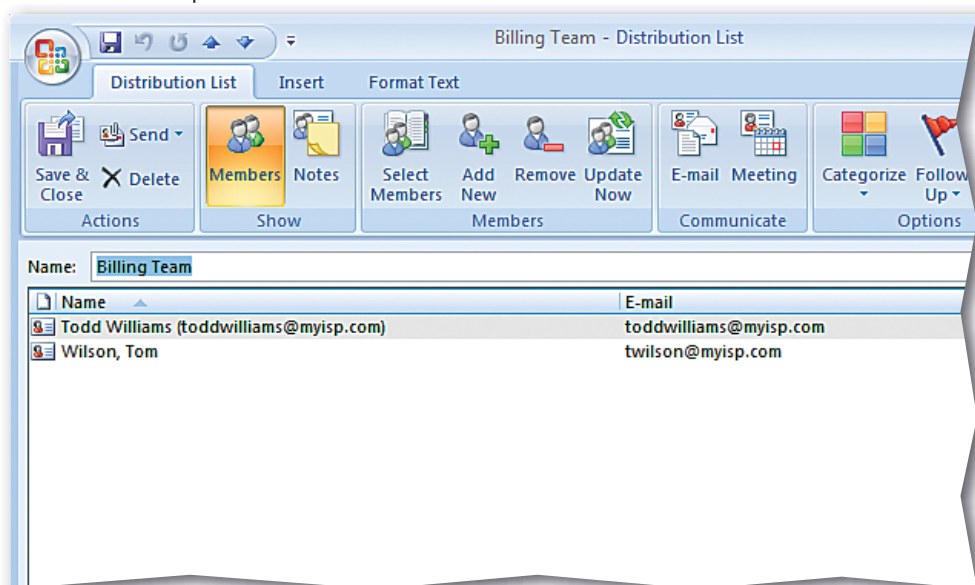


FIGURE 4.4 Updated Distribution List



## Step-By-Step

- 1 In the **Navigation** pane under **My Contacts**, right-click **Contacts** and select **New Folder**.
- 2 In the **Create New Folder** dialog box in the **Name** box, key: **Personal Contacts** (see Figure 4.5).
- 3 In the **Select where to place the folder** box, select **Personal Folders**. Click **OK**.
- 4 **CHECK** Your screen should look like Figure 4.6.
- 5 In the **Navigation** pane under **My Contacts**, right-click **Personal Contacts** and select **Properties**.
- 6 In the **Personal Contacts Properties** dialog box, click the **Outlook Address Book** tab. Make sure the **Show this folder as an e-mail Address Book** check box is selected. Click **OK**.

Continue to the next exercise.

### Troubleshooter

In Step 6, if the **Show this folder** option is grayed out, that means it is the default setting for creating a folder in **Business Cards** view.

## EXERCISE 4-2

### Create a Secondary Address Book for Personal Contacts

If you want to create separate listings for your business and personal contacts, you can create a separate, secondary address book. You can use the secondary address book to list all the personal contacts you want to maintain and e-mail them individually.

FIGURE 4.5 Create New Folder dialog box

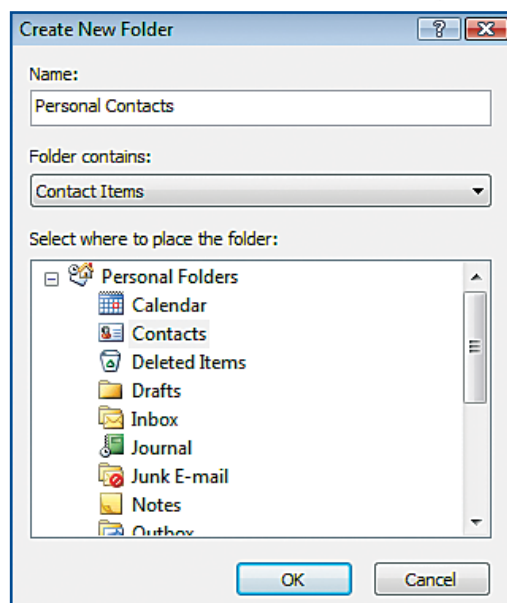
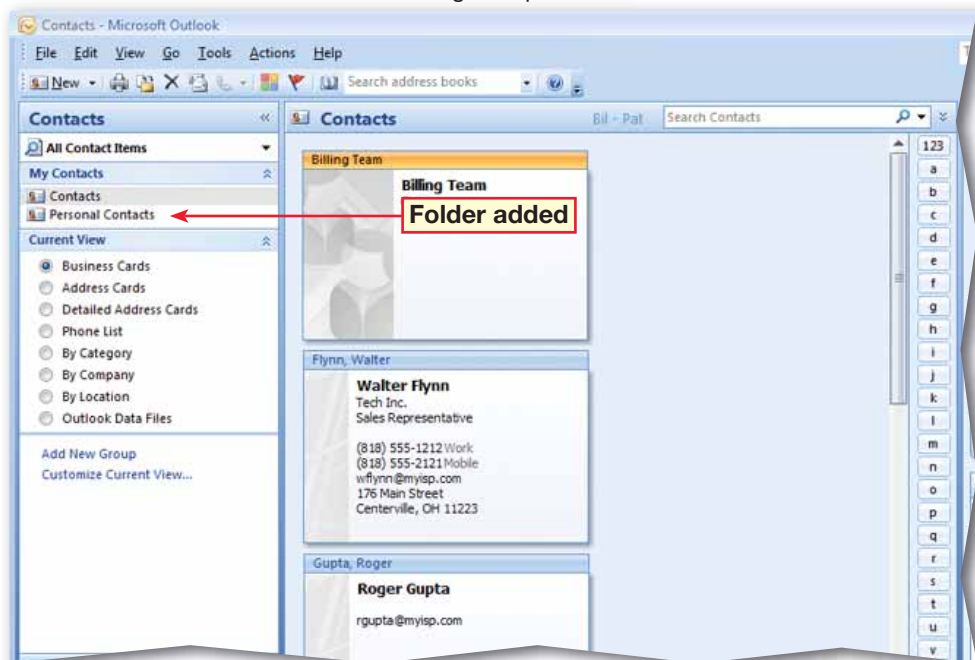


FIGURE 4.6 Personal Contacts in Navigation pane



## Step-By-Step

- 1 On the **Menu** bar, choose **File>Import and Export**.
- 2 In the **Import and Export Wizard**, select **Import from another program or file** and click **Next** (see Figure 4.7).
- 3 Select **Microsoft Excel 97-2003** and click **Next**.
- 4 Click **Browse** and navigate to the folder containing the **Personal Contacts.xlsx** data file. Select the file and click **OK**.
- 5 Under **Options** select **Do not import duplicate items**. Click **Next**.
- 6 In the **Select destination folder** box, scroll down and select **Personal Contacts**. Click **Next**.
- 7 Click **Finish**.
- 8 In the **Navigation** pane, under **My Contacts**, click **Personal Contacts**.
- 9 **CHECK** Your screen should look like Figure 4.8.

➔ Continue to the next exercise.

## EXERCISE 4-3

### Import a Secondary Address Book from Excel



In previous lessons, you learned to create contacts using Outlook functions. You can also import contacts that have been created using other Outlook accounts or even other programs. A list of contacts stored in an Excel file, for example, can be imported right into your main address book or into an address book of your choosing.

FIGURE 4.7 Import and Export Wizard

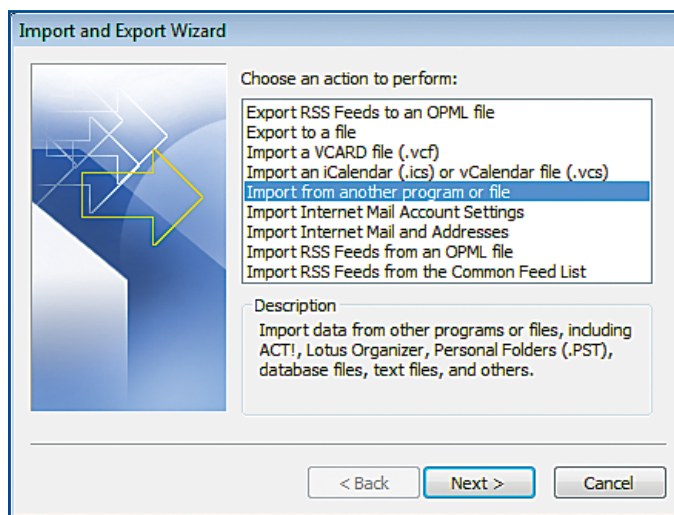
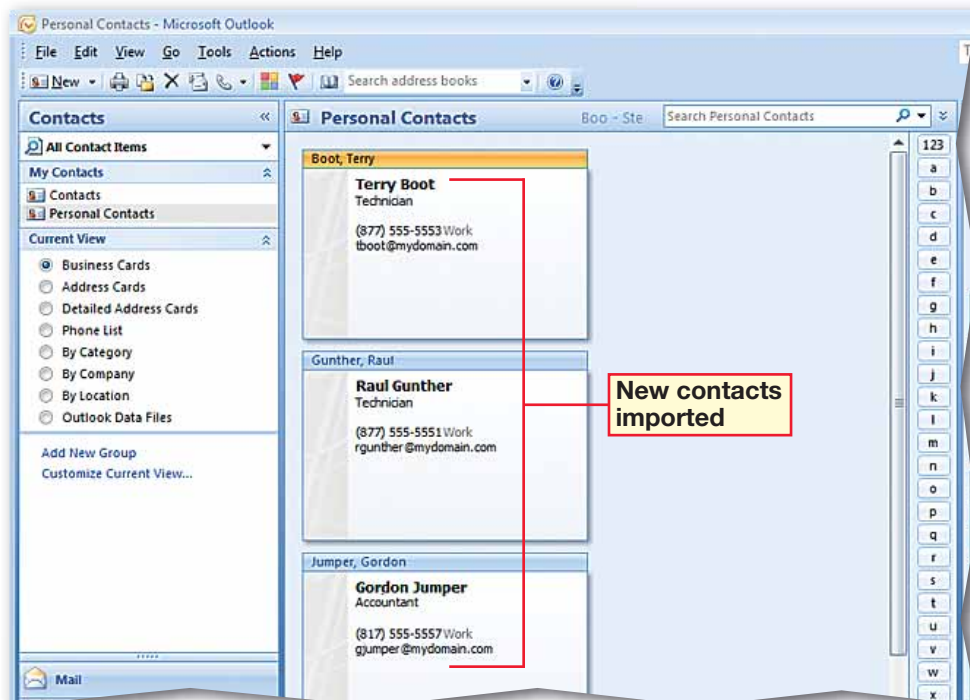





FIGURE 4.8 Personal Contacts address book



## Step-By-Step

- 1 In the **Navigation** pane, click **Mail**. Click **New Mail Message** .
- 2 In the **To** box, key the address of a classmate assigned by your teacher.
- 3 In the **Subject** box, key: **Friday's Conference Call**. In the message area, key: **Will you be participating in the call?**
- 4 **CHECK** Your screen should look like Figure 4.9. Click **Send** .
- 5 Select the **Friday's Conference Call** message that your classmate sent to you.
- 6 On the **Menu** bar, choose **Tools>Organize** .
- 7 Under **Ways to Organize Inbox** click **Using Colors**. In the **Color messages** field, click the drop-down arrow and select **Red**. Click **Apply Color** (see Figure 4.10).

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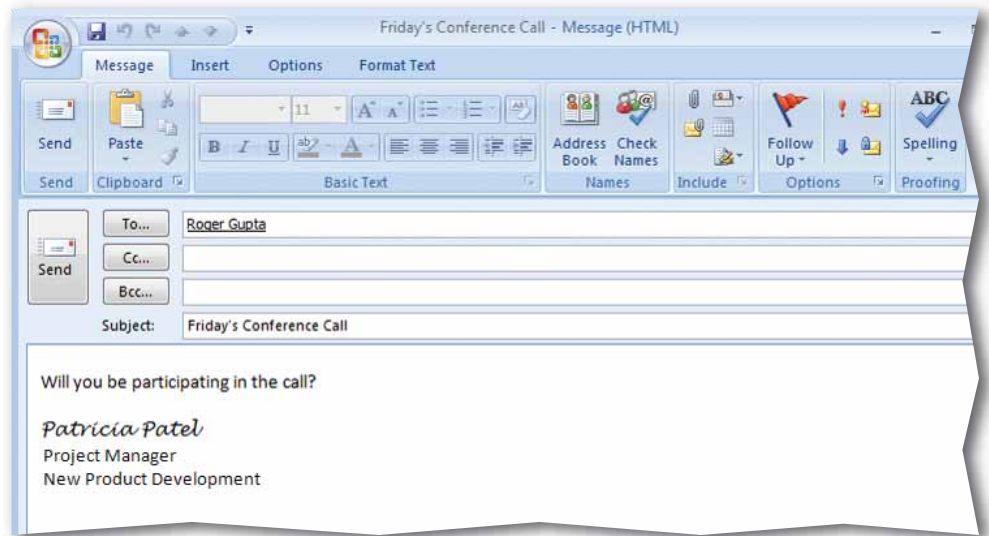
## EXERCISE 4-4

### Organize Items Using Colors and Views

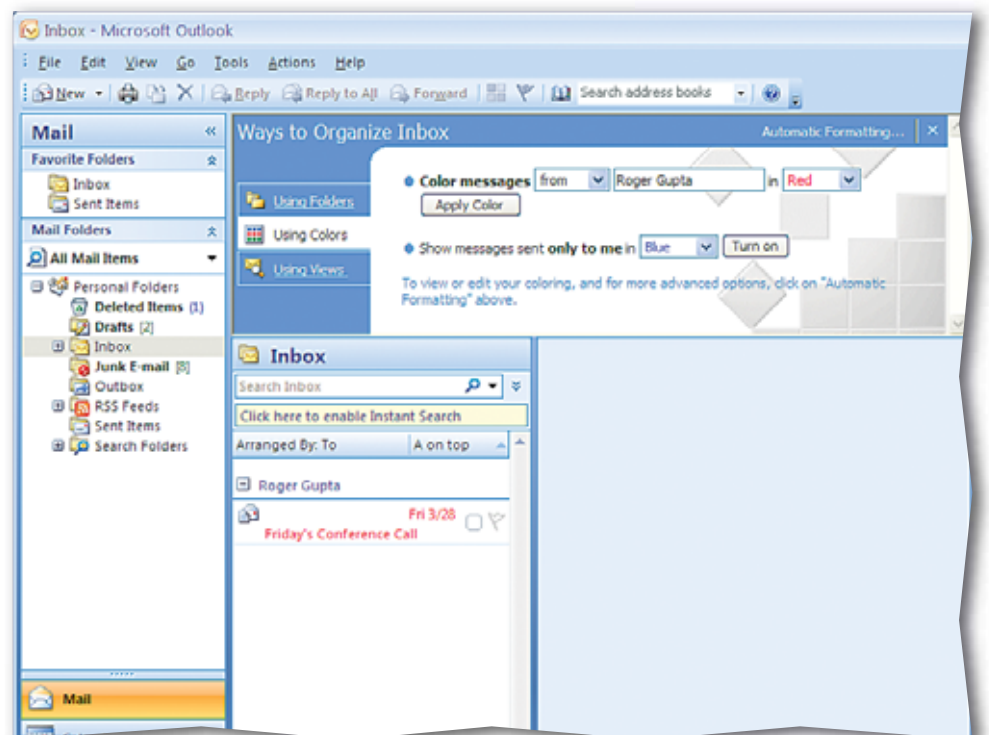


Outlook provides different tools that you can use to organize your messages. Use colors to **distinguish**, or identify, different kinds of messages quickly. You can also organize your Inbox by changing views. For example, you can change the view to display only unread messages or only messages that are less than one week old.

**FIGURE 4.9** Friday Conference message



**FIGURE 4.10** Organize Inbox in Red



## Step-By-Step

- 8 Click the **Color messages** drop-down arrow and select **Green**. Click **Apply Color**.
- 9 **CHECK** Your screen should look like Figure 4.11.
- 10 Under **Ways to Organize Inbox**, click **Using Views**. Under **Change your view**, select **Unread Messages in This folder**.
- 11 **CHECK** Your screen should look similar to Figure 4.12.
- 12 In the **Change your view** box, select **Messages**.
- 13 Click **Close Organize**.
- 14 In the main toolbar click **Categorize** and select **All categories**.
- 15 Click **New**. In the **Add New Category** dialog box, key: **Conference Call**. Click **OK** twice.
- 16 Notice that the messages are all tagged with the new **Conference Call** color category. Select all the tagged messages, right-click a color icon and select **Clear all categories**.

➔ Continue to the next exercise.

## EXERCISE 4-4 (Continued)

### Organize Items Using Colors and Views

FIGURE 4.11 Color applied to messages

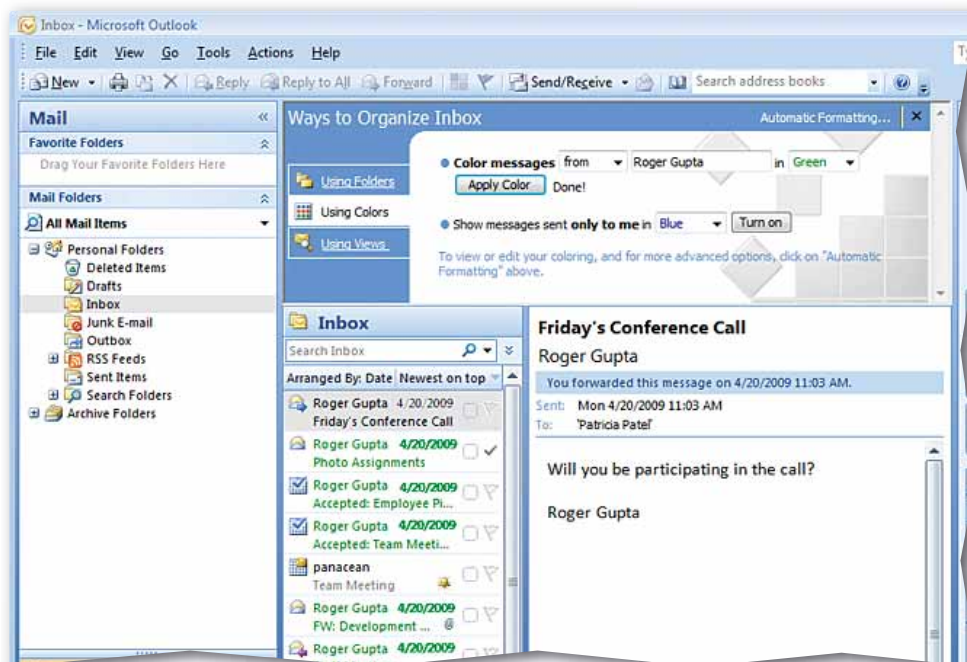
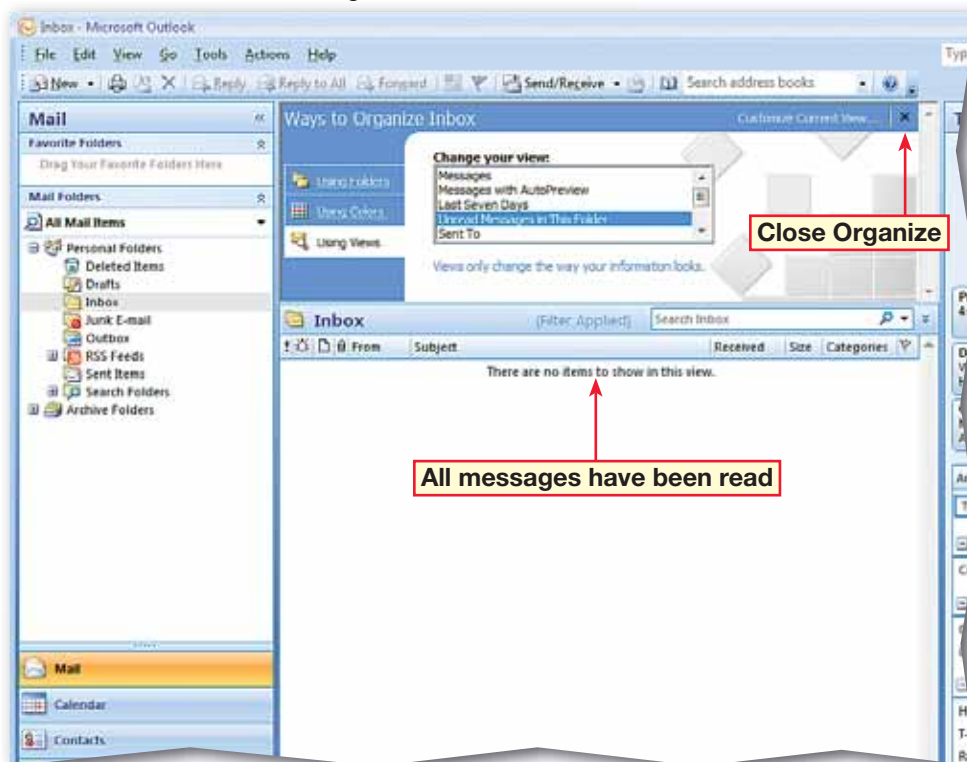


FIGURE 4.12 Unread Messages in This Folder view



## Step-By-Step

- 1 In your **Inbox**, select the e-mail from your classmate.
- 2 On the **Menu** bar, choose **Actions>Junk E-mail>Add Sender to Blocked Senders List** (see Figure 4.13).
- 3 If necessary, select **Please do not show me this dialog box again** and click **OK**.
- 4 Repeat Steps 1 and 2 two more times.
- 5 In the **Navigation** pane under **Mail Folders**, click the **Junk E-mail** folder.
- 6 Right-click the first message in the folder and choose **Junk E-mail>Mark as Not Junk**.
- 7 **CHECK** Your dialog box should look like Figure 4.14. Click **OK**.

➔ *Continued on the next page.*

### Academic Skills

The term *unsolicited* means unwanted. Write a list of criteria you would use to determine whether an e-mail in your junk mail box is unwanted or should be moved to your Inbox?

## EXERCISE 4-5 Manage Junk Mail Messages

Junk e-mail, or unsolicited messages, can hamper your efforts to organize and manage your e-mail effectively. Outlook's Junk E-mail Filter screens for junk e-mail to help sort out the majority of unwanted messages. You should also check the Junk E-mail folder occasionally to make sure no legitimate messages are being moved to the Junk E-mail folder by mistake.

FIGURE 4.13 Block Junk E-mail

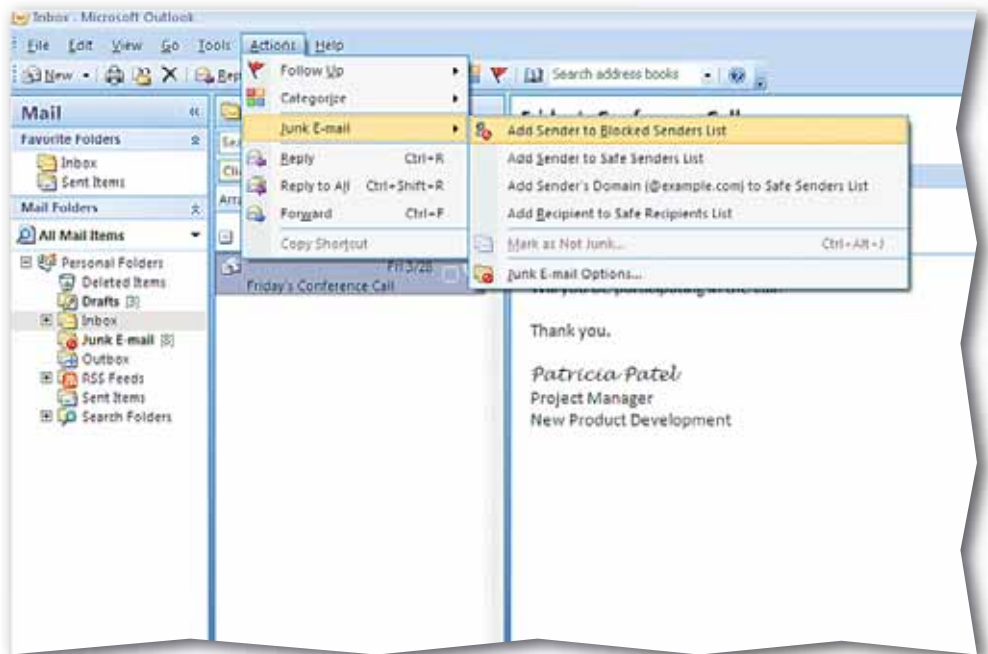
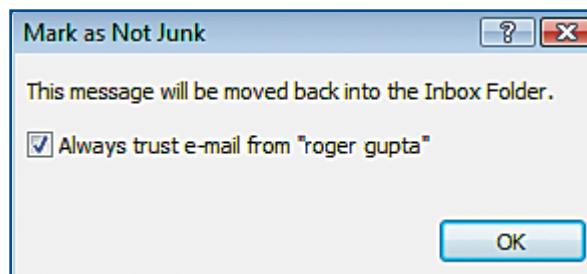


FIGURE 4.14 Mark as Not Junk



### Tech Tip

To permanently delete a single message in the **Junk E-mail** folder, select the message and press **SHIFT + DELETE**.

## Step-By-Step

- 8 On the **Menu** bar, choose **Actions>Junk E-mail>Junk E-mail Options**.
- 9 In the **Junk E-mail Options** dialog box, click the **Safe Senders** tab (see Figure 4.15).
- 10 **CHECK** Your screen should look like Figure 4.16.
- 11 Click **Add** (see Figure 4.16).
- 12 In the **Add Address or Domain** dialog box, key the address of the first message in the **Junk E-mail** folder. Click **OK**.
- 13 Repeat Steps 10 and 11 for the remaining messages in the folder.
- 14 Click **OK**.
- 15 In the **Navigation** pane under **Mail Folders**, right-click the **Junk E-mail** folder and select **Empty "Junk E-mail" Folder**.
- 16 In the confirmation dialog box, click **Yes**.

 *Continue to the next exercise.*

## EXERCISE 4-5 (Continued) Manage Junk Mail Messages



FIGURE 4.15 Junk E-mail Options dialog box

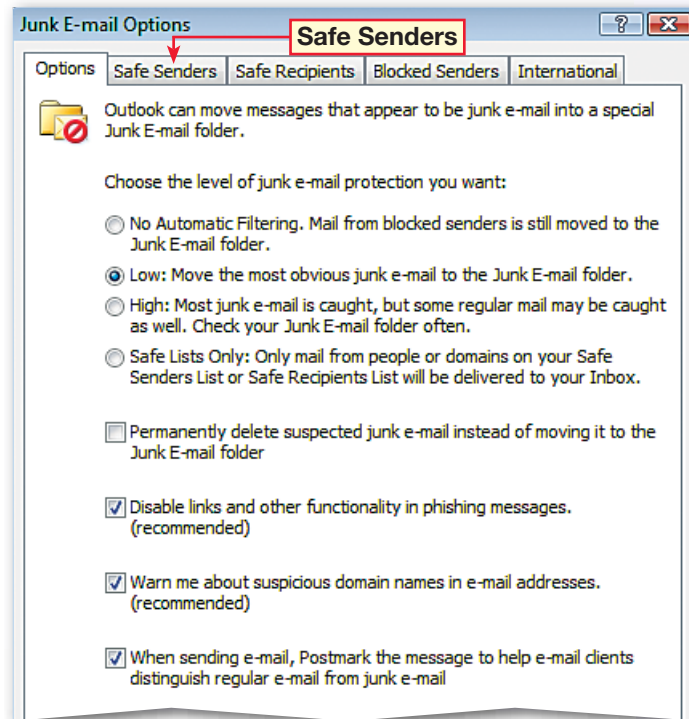
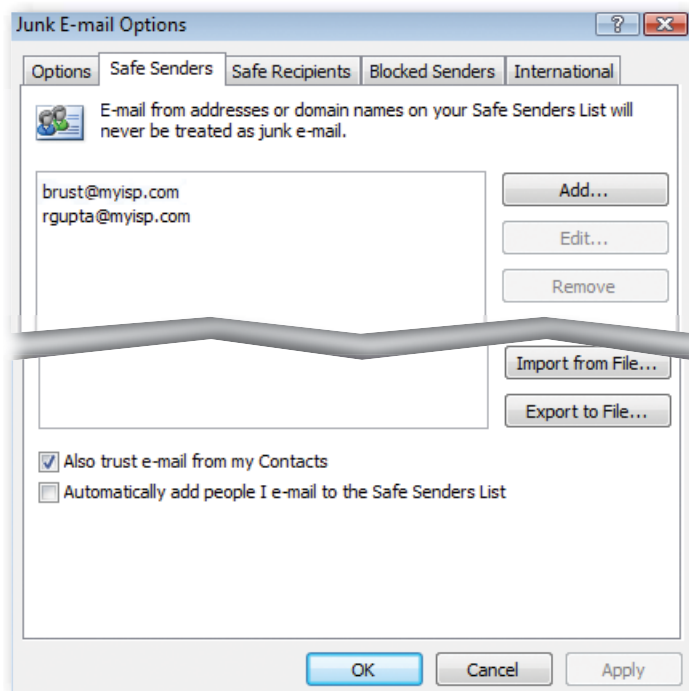




FIGURE 4.16 Junk E-mail Options Safe tab



## Step-By-Step

- 1 Click on the **Inbox** folder. On the **Menu** bar, choose **Tools>Rules and Alerts** .
- 2 In the **Rules and Alerts** dialog box, click **New Rule** .
- 3 In the **Rules Wizard** dialog box under **Step 1**, select **Move messages from someone to a folder** (see Figure 4.17).
- 4 Under **Step 2**, click **people or distribution list**.
- 5 **CHECK** Your dialog box should look like Figure 4.18. Double-click the contact assigned to you by your teacher. Click **OK**.
- 6 In the **Rules Wizard** dialog box under **Step 2**, click **specified**.
- 7 In the **Rules and Alerts** dialog box, select **Inbox**. Click **New**.
- 8 In the **Name** box, key: **Messages from [first initial and last name of assigned contact]**. Click **OK**.
- 9 Click **OK**. In the **Rules Wizard**, click **Next**. Click **Next** three times to accept the default options.

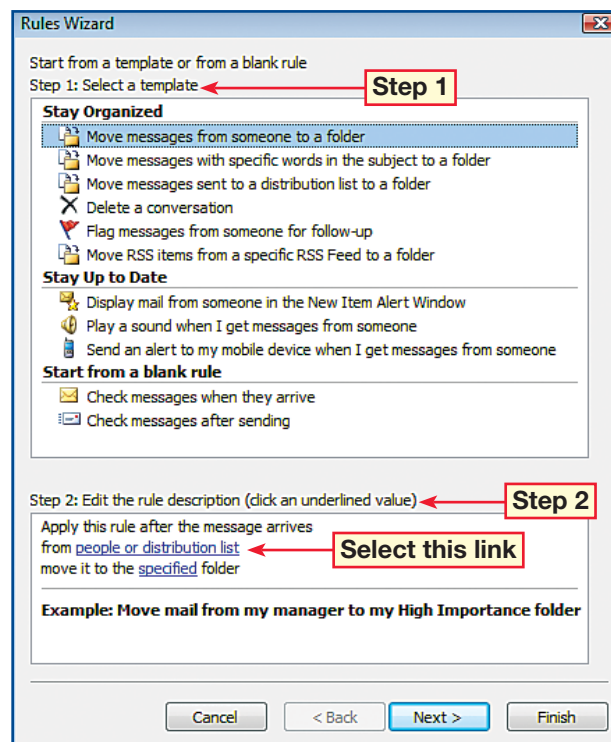
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## EXERCISE 4-6 Use Rules

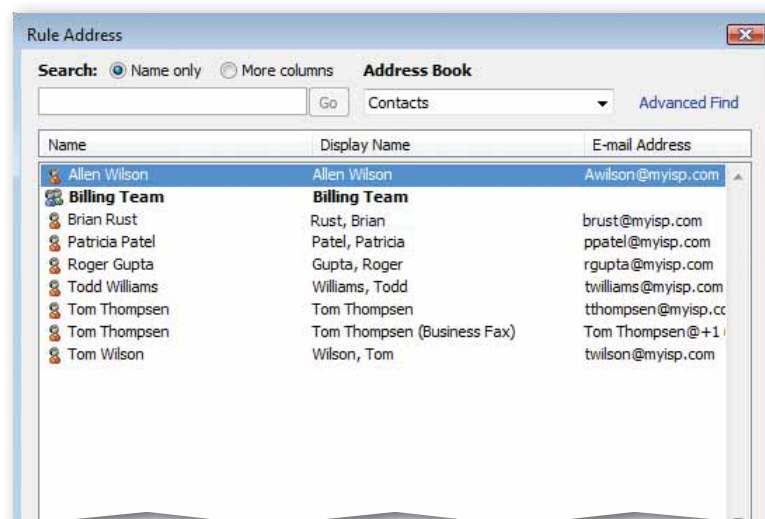


Outlook lets you manage and configure the handling of your unread e-mail by using rules. You can create a **rule** that will tell Outlook to organize messages automatically by moving them into specific folders. You also could create a rule that puts all incoming messages from one of your classmates into the same folder.

**FIGURE 4.17** Rules Wizard dialog box



**FIGURE 4.18** Rule Address dialog box





## Step-By-Step

- 10 Make sure both boxes under **Step 2: Setup rule options** are checked (see Figure 4.19). Click **Finish**.
- 11 Click **New Rule**. Under **Step 1** under **Start from a blank rule**, click **Check messages when they arrive**. Click **Next**.
- 12 Select the first choice under **Step 1**. Under **Step 2**, click **people or distribution list**. Double-click the first contact. Click **OK**. Click **Next**.
- 13 Under **Step 1**, select **delete it** and click **Next**. Click **Next** again, then click **Finish**.
- 14 In the **Rules and Alerts** dialog box, select the rule you just made and click **Delete**. Click **Yes** in the and click **OK**. Click **Apply**.
- 15 **CHECK** Your screen should look like Figure 4.20.

Continue to the next exercise.

### Academic Skills

Troubleshooting is a skill very much like proofreading but not exactly the same. The **Rules and Alerts Wizard** gives you several opportunities to troubleshoot rules. On a sheet of paper, identify how the wizard lets you troubleshoot your rules.

## EXERCISE 4-6 (Continued) Use Rules

FIGURE 4.19 Rules Wizard final page

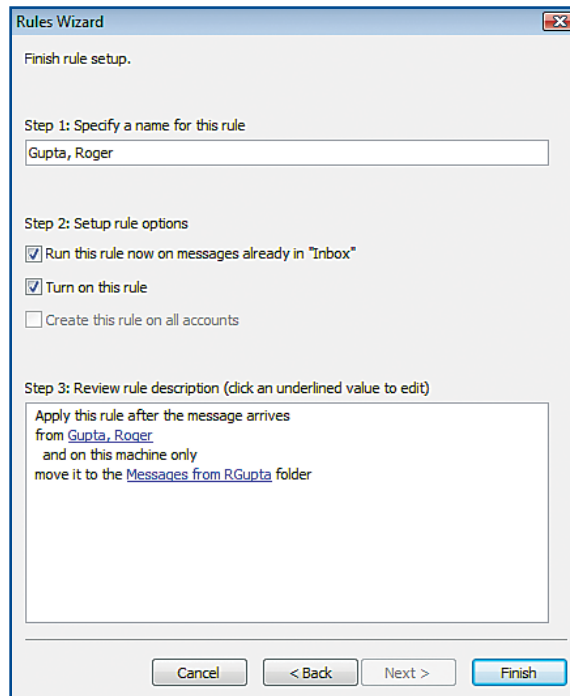
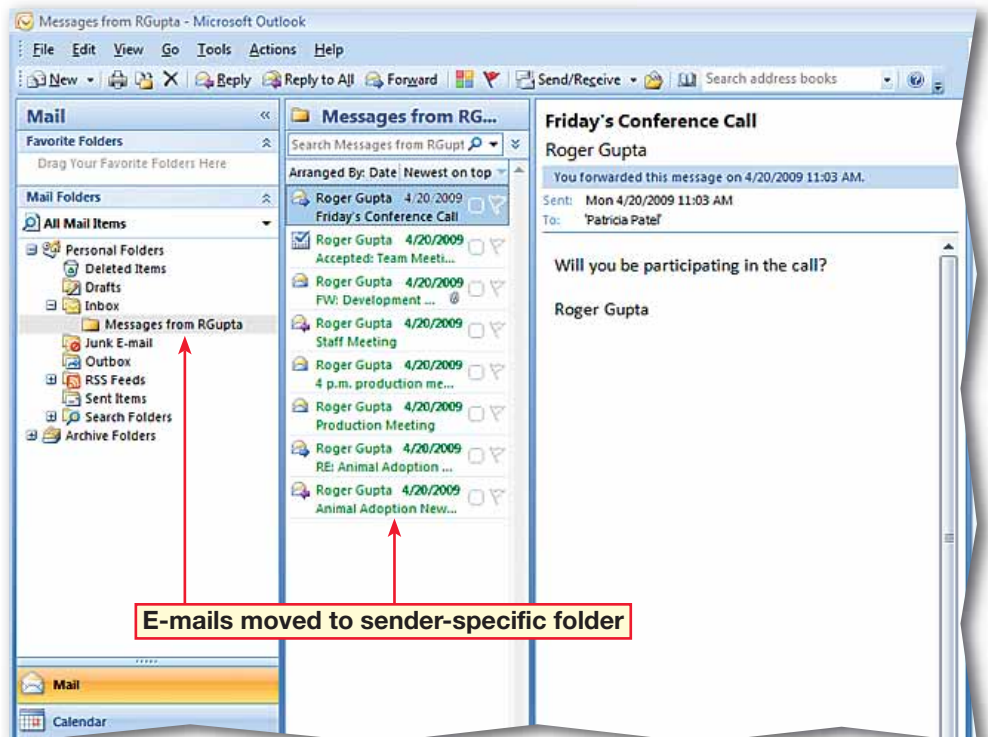




FIGURE 4.20 Messages from RGupta folder



## Step-By-Step

- 1 Click on the **Inbox** folder. On the **Menu** bar, choose **Tools>Rules and Alerts** .
- 2 In the **Rules and Alerts** dialog box, select **New Rule**  (see Figure 4.21).
- 3 In the **Rules Wizard** dialog box in **Step 1**, under **Start from a blank rule**, select **Check messages when they arrive**. Click **Next**.
- 4 Under **Step 1**, select **marked as importance**. Under **Step 2**, click **importance**.
- 5 In the **Importance** dialog box, click the drop-down arrow and select **High**. Click **OK**. Click **Next**.
- 6 Under **Step 1**, select **assign it to the category category**. Under **Step 2**, click **category**.
- 7 In the **Color Categories** dialog box, select the **Red** category.
- 8 **CHECK** Your dialog box should look like Figure 4.22. Click **OK**. Click **Next** twice.
- 9 In the wizard, check both options under **Step 2**. Click **Finish**. Click **OK**.

 Continue to the next exercise.

## EXERCISE 4-7

### Create a Rule to Categorize E-mail

You can have Outlook automatically categorize your e-mail using the Rules and Alerts function. When you receive an e-mail, Outlook can be set to check certain parameters of the message upon its arrival and categorize it accordingly.

FIGURE 4.21 Rules and Alerts dialog box

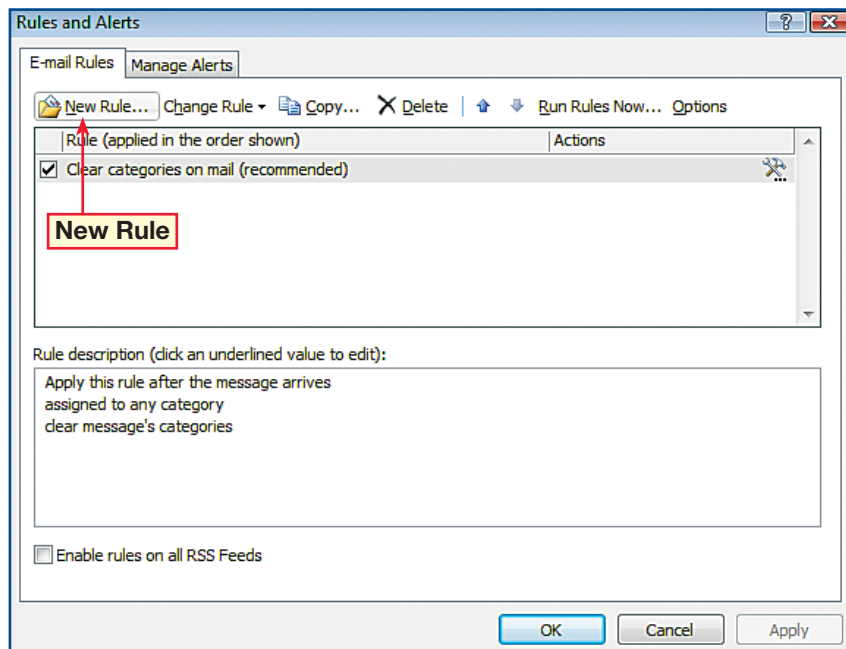
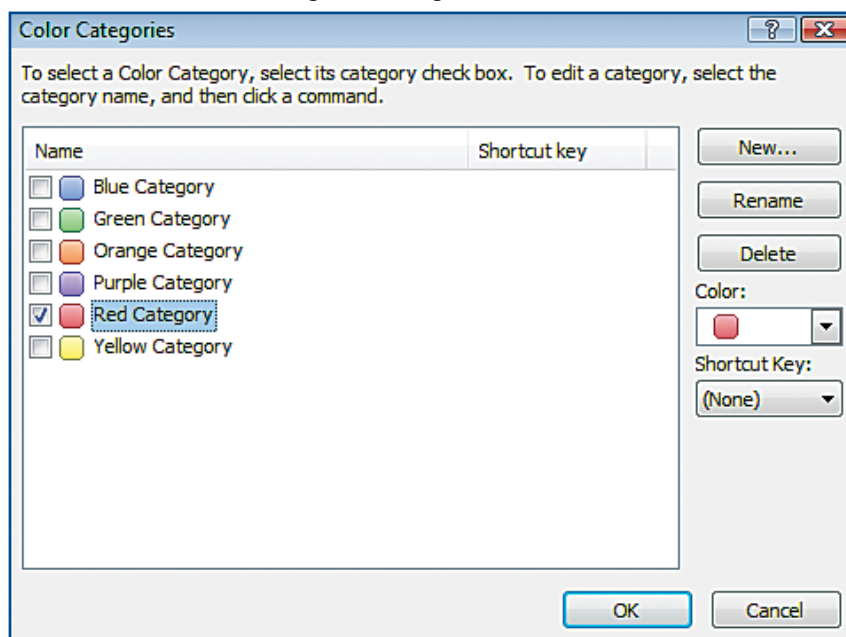




FIGURE 4.22 Color Categories dialog box



## Step-By-Step

**1** On the **Menu** bar, choose **Tools>Rules and Alerts** . Click **New Rule** .

**2** In the **Rules Wizard**, in **Step 1** under **Start from a blank rule**, select **Check messages when they arrive**. Click **Next**.

**3** Under **Step 1**, select **with specific words in the subject**. Under **Step 2**, click **specific words**.

**4** In the **Search Text** dialog box in the **Specify words or phrases** box, key: **Conference Call**.

**5** **CHECK** Your dialog box should look like Figure 4.23. Click **Add**. Click **OK**. Click **Next**.

**6** Under **Step 1**, select **forward it to people or distribution list**. Under **Step 2**, click **people or distribution list**.

**7** In the **Rule Address** dialog box, select the address of the classmate assigned to you and click **To**. Click **OK**. Click **Next** twice. Click **Finish**.

**8** Select the **Conference Call** rule and click **Apply** (see Figure 4.24).

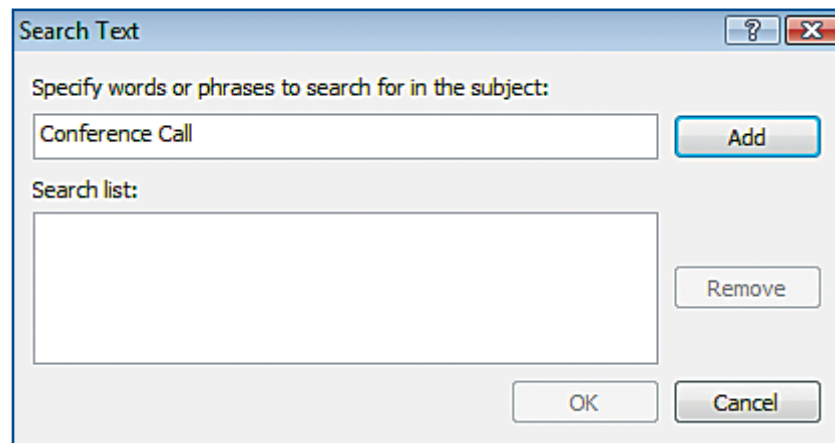
 *Continue to the next exercise.*

## EXERCISE 4-8

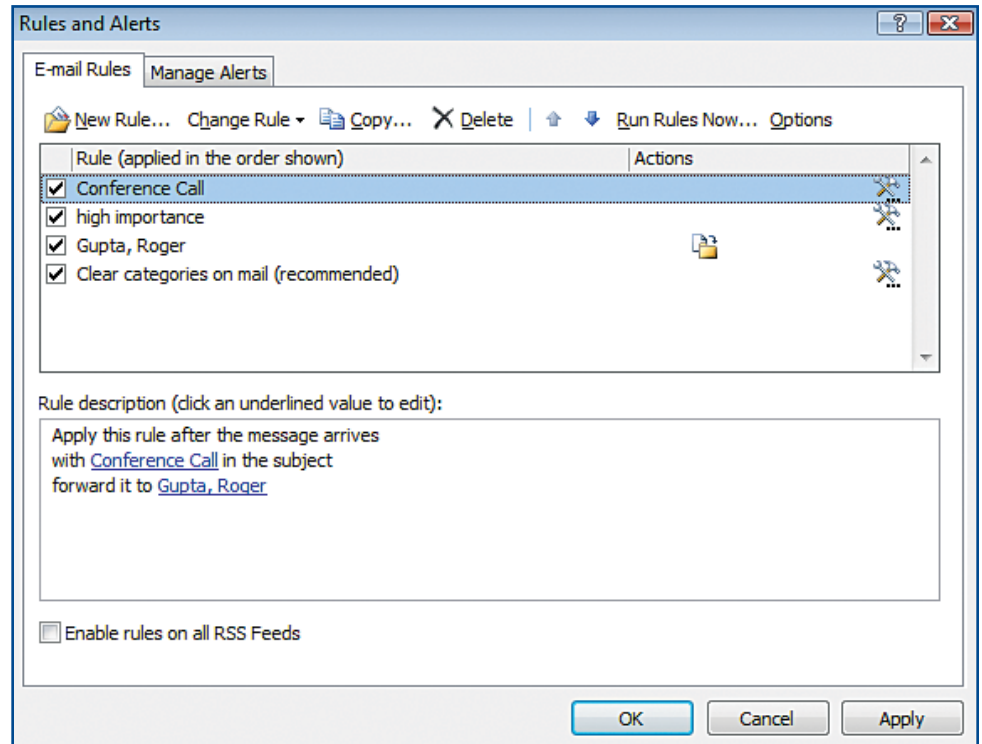
### Create a Rule to Forward E-mail

Outlook rules can do more than just act on mail sent to your Inbox. They can also forward or reply to messages that come into your Inbox that fit the criteria that you set.


**FIGURE 4.23** Search Text dialog box



**FIGURE 4.24** Rules and Alerts dialog box Conference Call rule



## Step-By-Step

- 1** In the **Rules and Alerts** dialog box, click **New Rule** .
- 2** Under **Step 1** under **Start from a blank rule**, select **Check messages when they arrive**.
- 3** **CHECK** Your dialog box should look like Figure 4.25. Click **Next**.
- 4** Under **Step 1**, select **received in a specific date span**. Under **Step 2**, click in a **specific date span**.
- 5** In the **Date Received** dialog box, check the **Before** box. Click the **Before** drop-down arrow and select a date six months ago.
- 6** **CHECK** Your dialog box should look similar to Figure 4.26. Click **OK**. Click **Next**.
- 7** Under **Step 1**, select **delete it**. Click **Next**.
- 8** On the exceptions page under **Step 1**, select **except if it is marked as importance** and **except if it is marked for action**. Under **Step 2**, click **action**.

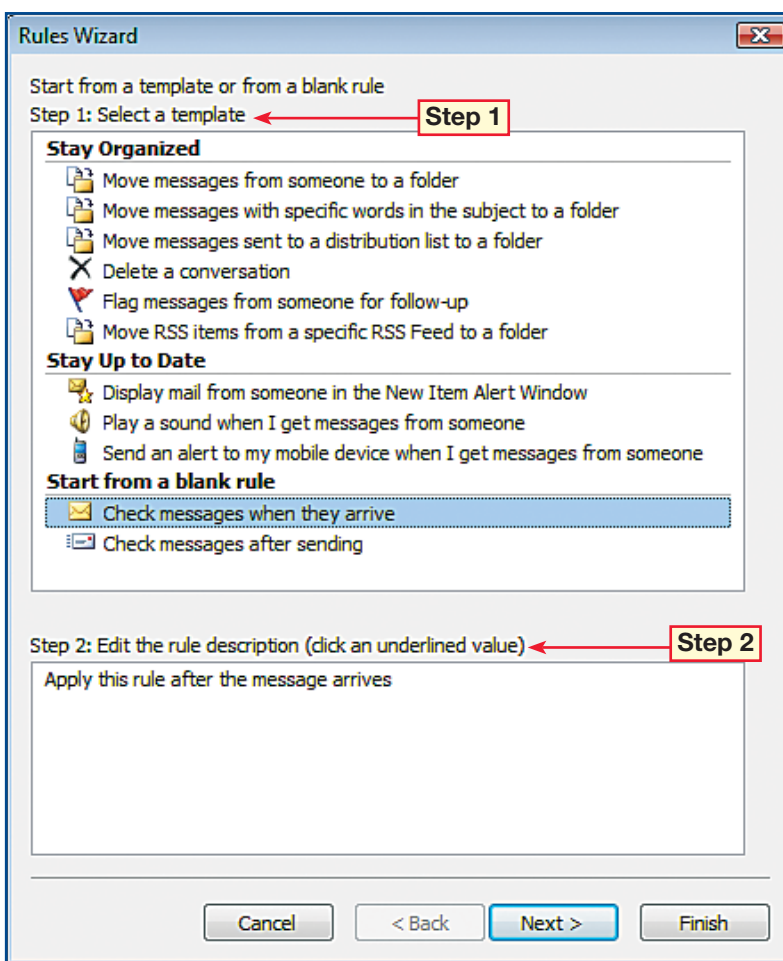
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## EXERCISE 4-9

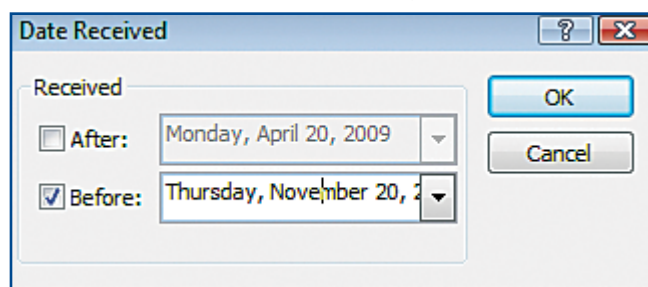
### Create a Rule to Delete E-mail

Outlook can even help you clean up your Inbox by allowing you to create a rule that will delete e-mail messages that fit the parameters, or criteria, that you define.

**FIGURE 4.25** Rules Wizard



**FIGURE 4.26** Date Received dialog box



## Step-By-Step

- 9 In the **Flagged Message** dialog box, accept the default **Any** and click **OK**.
- 10 Under **Step 2**, click **importance**. In the **Importance** dialog box, click the drop-down arrow and select **High**. Click **OK**.
- 11 Click **Next**.
- 12 In the **Step 1** box, highlight the text and key: **Delete older than 6 months** (see Figure 4.27).
- 13 Select both options under **Step 2**. Click **Finish**.
- 14 **CHECK** Your dialog box should look similar to Figure 4.28.
- 15 Click **OK**.

Continue to the next exercise.

### You Should Know

Rules can help you to stay organized. You can file and follow up on the messages in your Inbox.

## EXERCISE 4-9 (Continued) Create a Rule to Delete E-mail

FIGURE 4.27 Rules Wizard final page

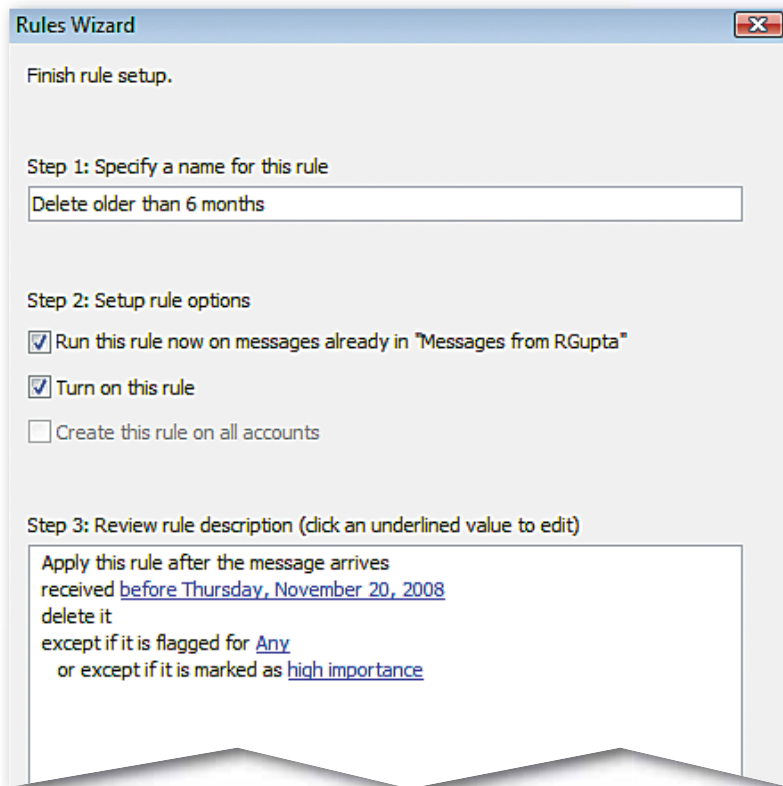
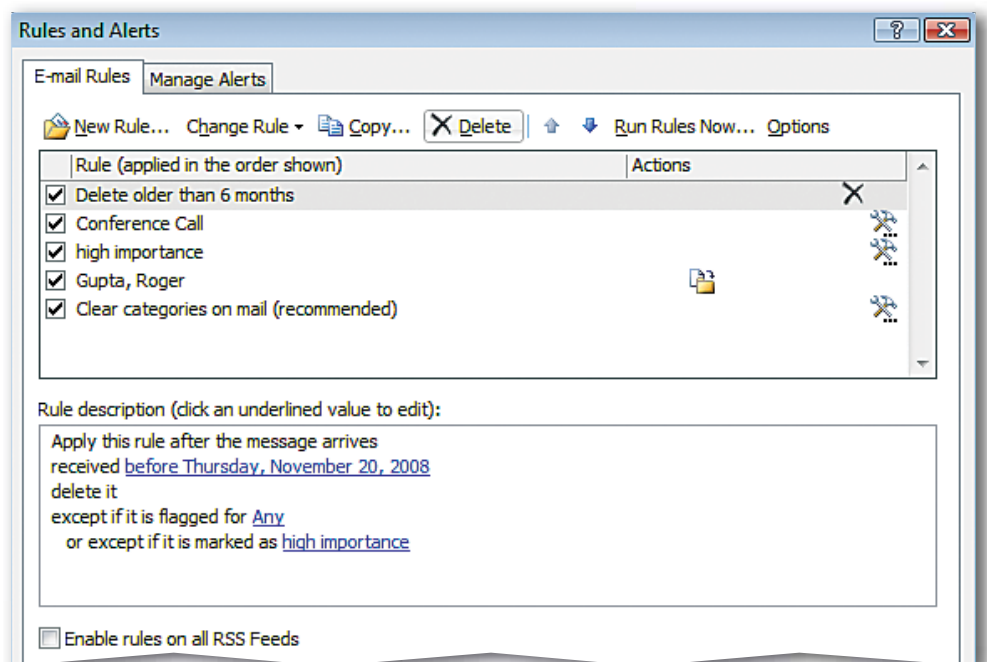



FIGURE 4.28 Rules and Alerts box with new rules



## Step-By-Step

- 1 On the **Menu** bar, choose **File>New>Folder** .
- 2 In the **Create New Folder** dialog box, under **Name**, key: **Product Launch**.
- 3 Under **Select where to place the folder**, select **Inbox** (see Figure 4.29). Click **OK**.
- 4 Repeat Steps 1 through 3 three more times. Name one folder **Personnel**. Name the next folder **Deadlines**. Name the last folder **Calls**.
- 5 In the folder list, right-click the **Deadlines** folder and select **Delete "Deadlines"**.
- 6 In the warning dialog box, click **Yes**.
- 7 **CHECK** Your screen should look like Figure 4.30.
- 8 Right-click the **Calls** folder and select **Move "Calls"**.
- 9 In the **Move Folder** dialog box, select **Personal Folders**. Click **OK**.
- 10 Click the **Inbox** folder.

 Continue to the next exercise.

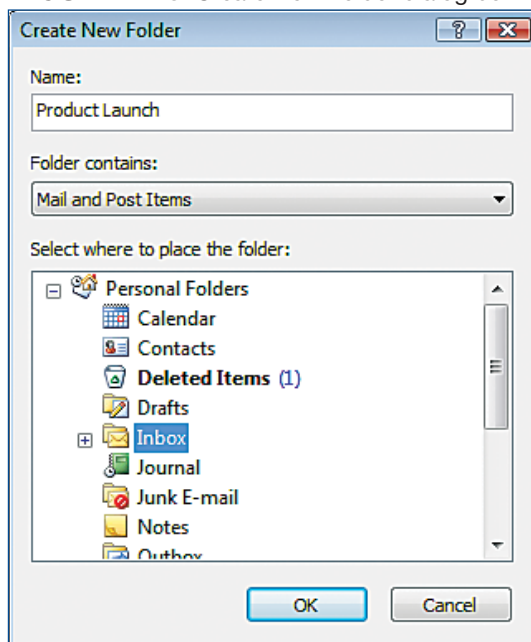
## EXERCISE 4-10

### Create, Delete, and Move Folders

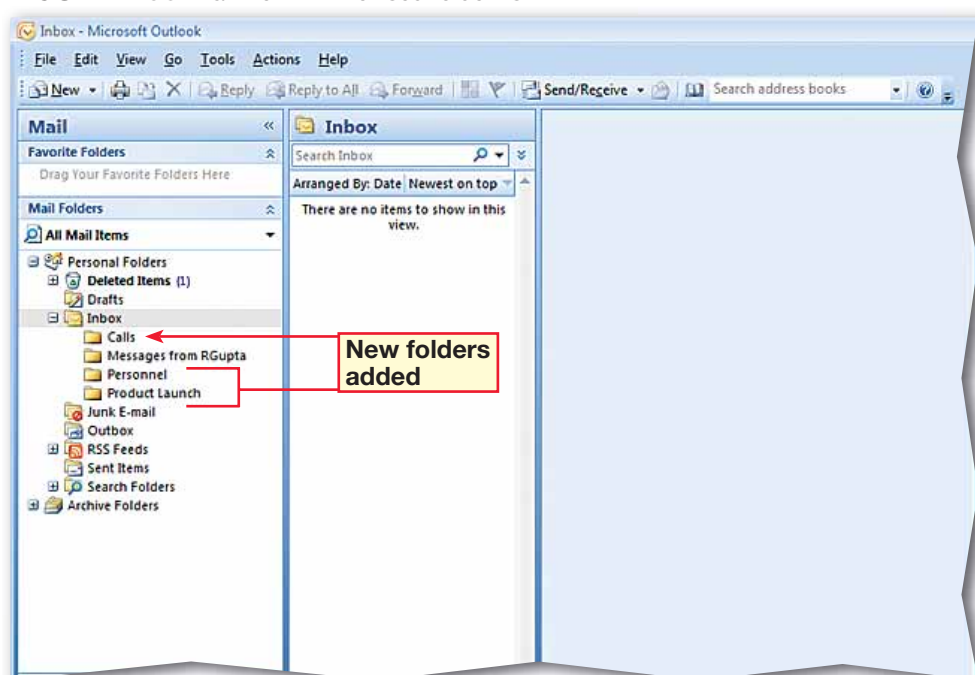


Create folders to hold e-mail related to different projects, people, or events. At the end of a project, or following an event, some folders may no longer be necessary. To stay organized, delete any folders that you no longer need.

**FIGURE 4.29** Create New Folder dialog box



**FIGURE 4.30** Mail view with revised folder list



## Step-By-Step

**1** In the **Navigation** pane under **Mail Folders**, open the folder **Messages from [your assigned contact's first initial and last name]**.

**2** Right-click the message **Friday's Conference Call** and select **Move to Folder**.

**3** In the **Move Items** dialog box, click the **Product Launch** folder (see Figure 4.31).

**4** Click **OK**.

**5** Under **Mail Folders**, click the **Product Launch** folder.

**6** **CHECK** Your screen should look like Figure 4.32.

➔ *Continue to the next exercise.*

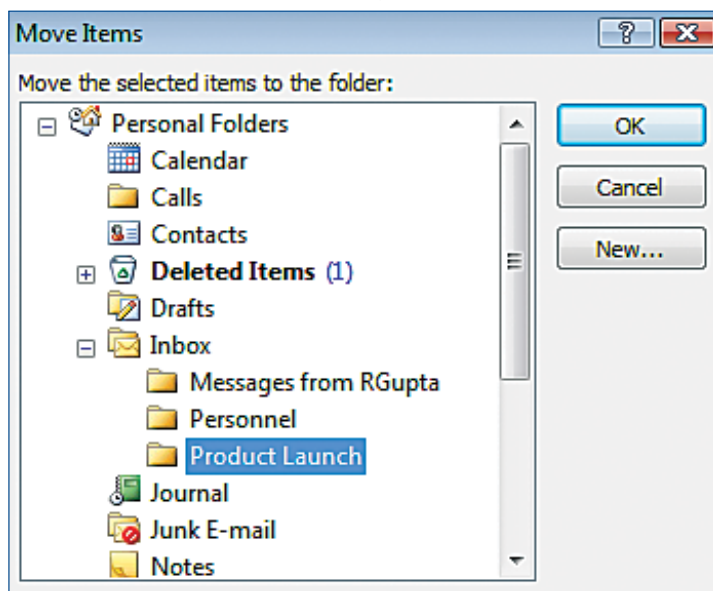
### Shortcuts

The quickest way to move a message to another folder is to click and drag it to the folder.

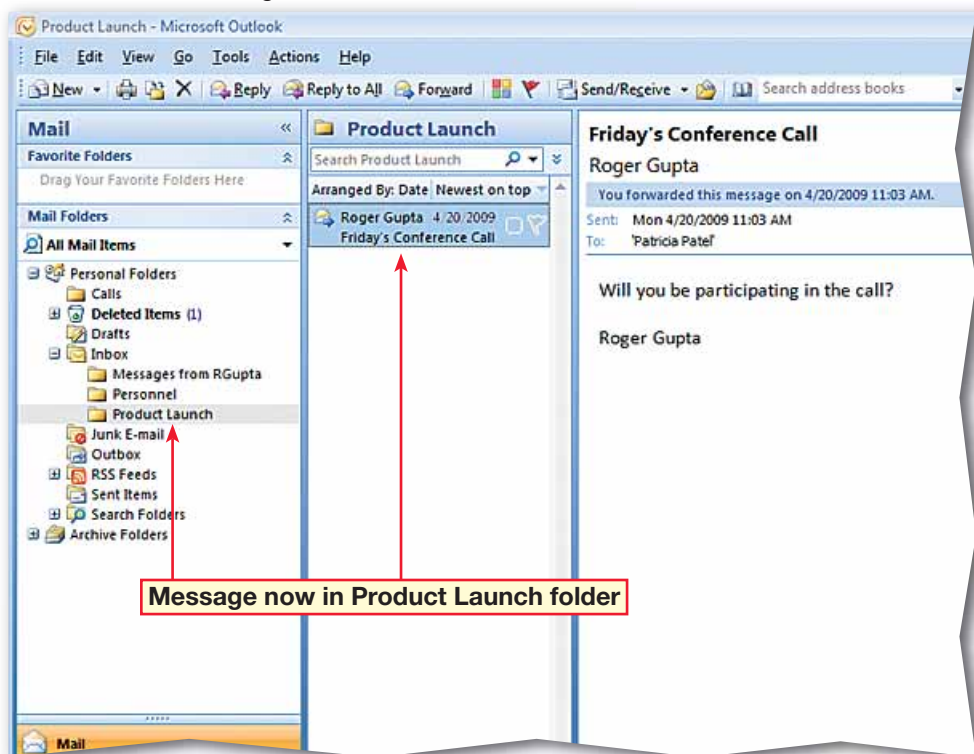
## EXERCISE 4-11 Move Items between Folders

Sometimes you need to move a message from one folder to another. Outlook makes it easy to move messages between folders.

**FIGURE 4.31** Move Items dialog box



**FIGURE 4.32** Message moved to Product Launch folder



## Step-By-Step

- 1 Send your assigned contact an e-mail with the subject **New Agenda**.
- 2 Under **Mail Folders**, click on the **Messages from [your assigned contact's first initial and last name]** folder. Note the date of the **New Agenda** e-mail.
- 3 On the **Menu** bar, choose **File>Archive**. In the **Archive** dialog box, select the **Messages from [your assigned contact's first initial and last name]** folder.
- 4 Click the **Archive items older than** drop-down arrow (see Figure 4.33). Select a date three months earlier than today.
- 5 Click **OK**.
- 6 **! CHECK** Your screen should look like Figure 4.34.

Continue to the next exercise.

### Tech Tip

In many businesses, e-mail is subject to the organization's retention policies and procedures. These policies may restrict your ability to delete some messages or to keep messages beyond a specific period of time.

## EXERCISE 4-12 Archive Items

The process of saving old messages is called archiving. **AutoArchive** automatically moves older messages to another location so that your Inbox and other folders do not get cluttered. You can also manually archive your messages by using the Archive dialog box.

FIGURE 4.33 Archive dialog box

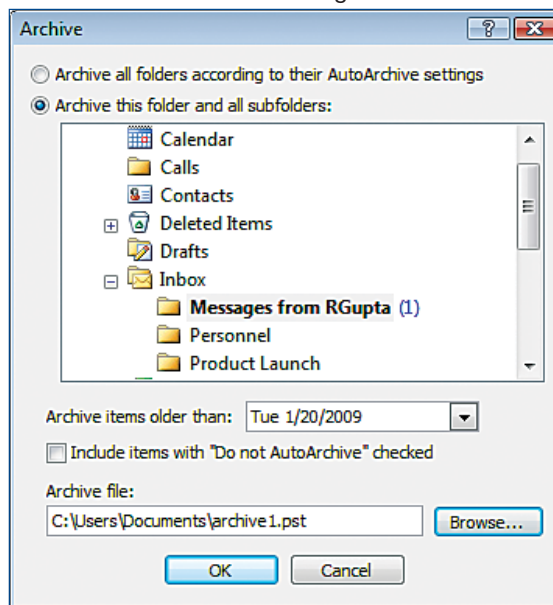
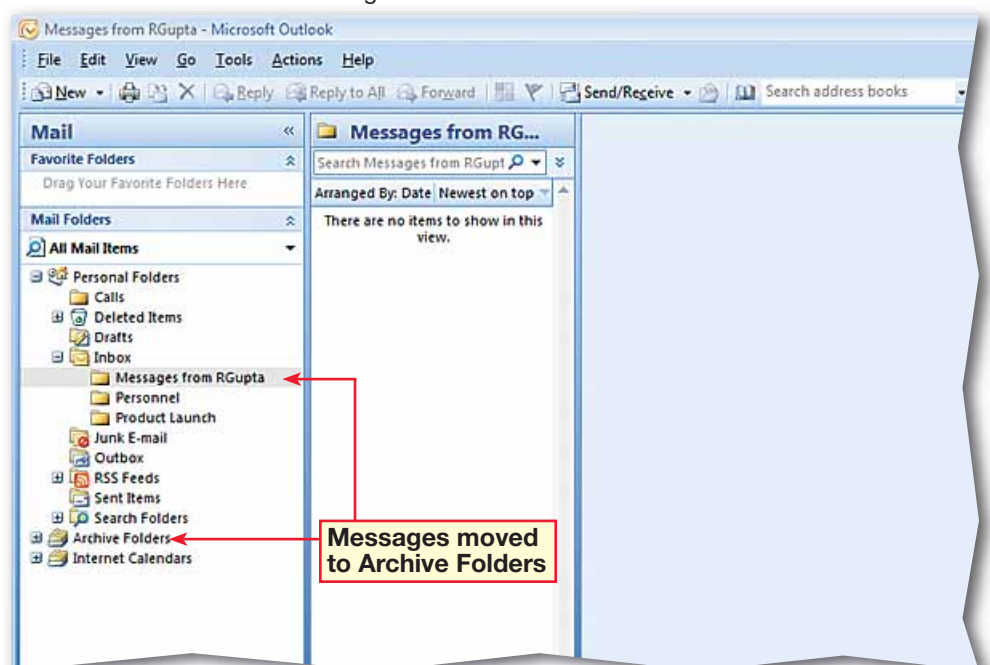


FIGURE 4.34 Archived message





## Step-By-Step

- 1 Under **Mail Folders**, click the **Sent Items** folder.
- 2 On **Menu** bar, choose **Edit>Select All**.
- 3 On **Menu** bar, click **Edit**. Click **Delete**.
- 4 If necessary, in the warning box, click **Yes** to delete all the messages in the **Sent Items** folder permanently without sending them to the **Deleted Items** folder.
- 5 **CHECK** Your screen should look like Figure 4.35.
- 6 Under **Mail Folders**, click the **Deleted Items** folder.
- 7 On **Menu** bar, choose **Tools>Empty “Deleted Items” Folder**. In the warning box, click **Yes**.
- 8 Choose **Tools>Options**. In the **Options** box click the **Other** tab.
- 9 Under **General**, select the option **Empty the Deleted Items folder upon exiting**.
- 10 **CHECK** Your screen should look like Figure 4.36. Click **OK**.

➔ Continue to the next exercise.

## EXERCISE 4-13

### Empty the Deleted and Sent Items Folders

Outlook stores deleted messages and e-mail messages that you have sent in folders so that you can retrieve them should you need them. However, those files may become so full that it is no longer efficient to store those messages. You should periodically empty those folders to maintain an orderly system and free up space. You can also set the Deleted Items folder to empty automatically when you exit Outlook.

FIGURE 4.35 Sent Items folder messages deleted

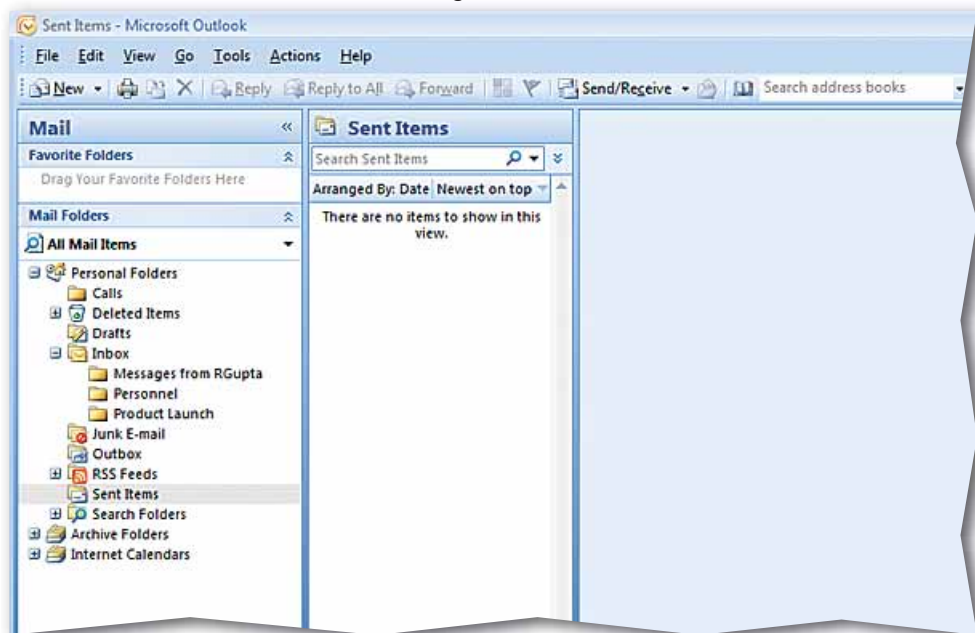
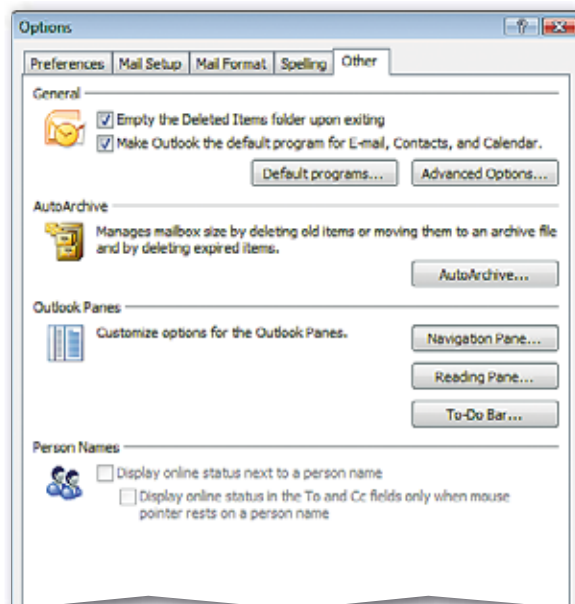


FIGURE 4.36 Set to Empty Deleted Items folder upon exiting



## Step-By-Step

- 1 In the **Navigation** pane, under **Mail Folders**, click the **All Mail Items** header.
- 2 In the preview pane in the **All Mail Items** search box key: **Conference Call**.
- 3 **CHECK** Your screen should look like Figure 4.37.
- 4 Click **Clear Search**.
- 5 On the **Menu** bar, choose **Tools>Instant Search>Advanced Find**.
- 6 In the **Advanced Find** dialog box, in the **Look for** drop-down box, select **Any type of Outlook item** (see Figure 4.38).
- 7 Under the **Any Items** tab, in the **Search for the word(s)** box, key: **[Name of your assigned classmate]**.

*Continued on the next page.*

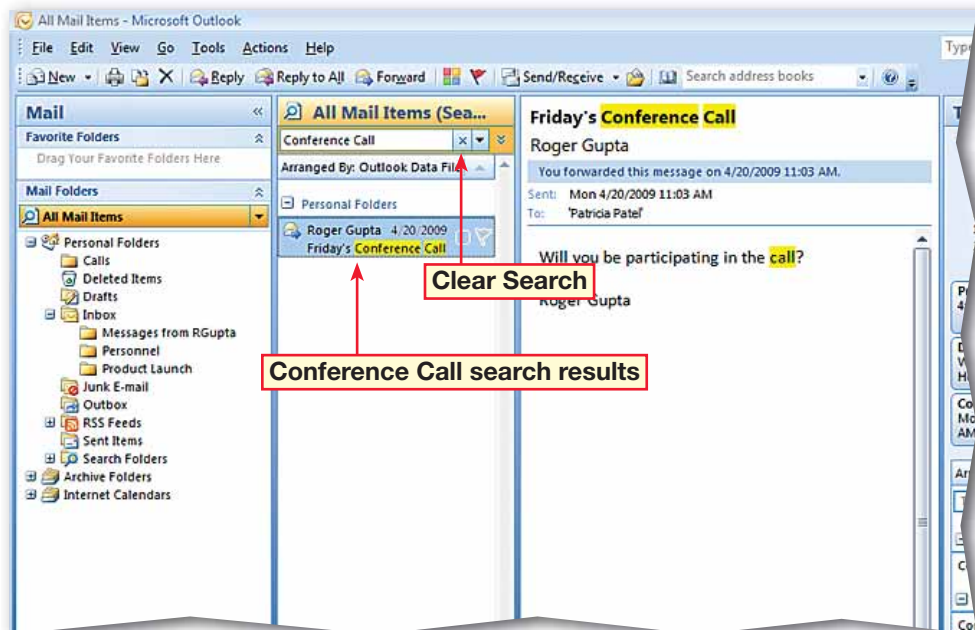
### Shortcuts

You can also open the Advanced Find dialog box by pressing **CTRL** + **SHIFT** + **F**.

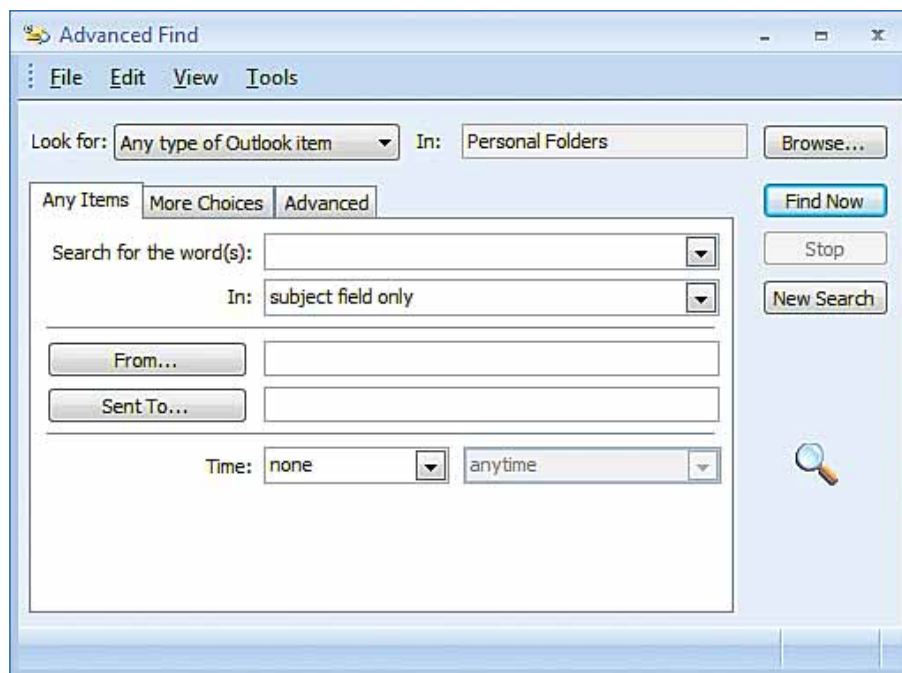
## EXERCISE 4-14 Search for Mail Items

Use the Outlook search features to locate messages or other Outlook items in any combination of folders. You can also search for all the Outlook items related to a specific person.

**FIGURE 4.37** All Mail Items search



**FIGURE 4.38** Advanced Find dialog box



## Step-By-Step


**8** In the **Inbox**, click the drop-down arrow and select **frequently-used text fields**.

**9** Click **Find Now**.

**10** **CHECK** Your dialog box should look like Figure 4.39.

**11** Click **Close** .

**12** In the **Navigation** pane, click **Contacts**. Under **My Contacts**, click the **Contacts** folder.

**13** In the **Contacts** view, click in the **Search Contacts** box and key: **[Name of your assigned classmate]**. Click **Search** .

**14** **CHECK** Your screen should look similar to Figure 4.40.

**15** Click **Clear Search** .

 Continue to the next exercise.

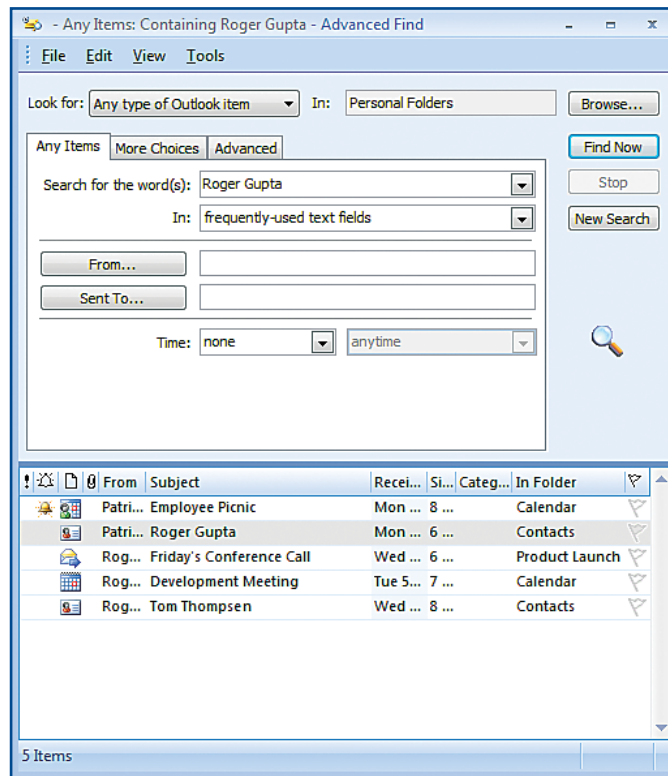
### You Should Know

The Instant Search feature is available in all Outlook views, including **Calendar**, **Contacts**, and **Tasks**.

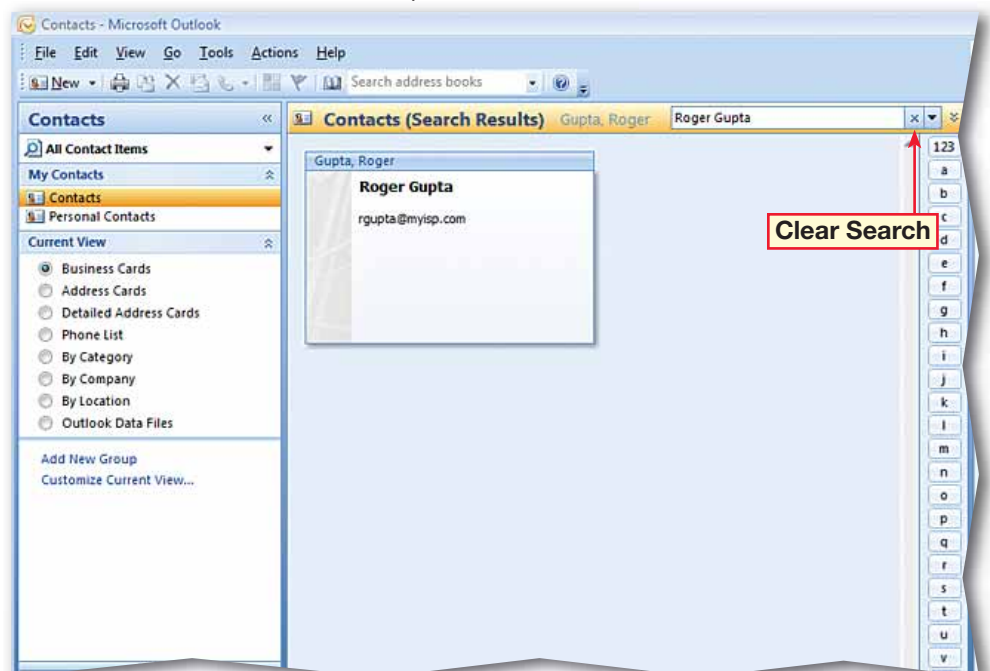
## EXERCISE 4-14 (Continued)

### Search for Mail Items


**FIGURE 4.39** Advanced Find dialog box with search completed



**FIGURE 4.40** Contact search completed



## Step-By-Step

- 1 On the **Menu** bar, choose **Tools>Instant Search>Advanced Find**.
- 2 In the **Advanced Find** dialog box, in the **Look for** box, click the drop-down arrow and select **Any type of Outlook Item**.
- 3 Click **Browse**. In the **Select Folder(s)** dialog box, click the plus-sign to the left of the **Inbox** folder. Select the **Inbox** folder and all the Inbox subfolders. Click **OK**.
- 4 In the **Advanced Find** dialog box, click the **More Choices** tab. Click **Categories**.
- 5 **CHECK** Your dialog box should look like Figure 4.41.
- 6 In the **Color Categories** dialog box, select the **Green** and **Red** category names and click **OK**.
- 7 In the **Rename Category** dialog box, click **No**.
- 8 Click **Find Now**.
- 9 **CHECK** Your dialog box should look like Figure 4.42.
- 10 Click **Close** 

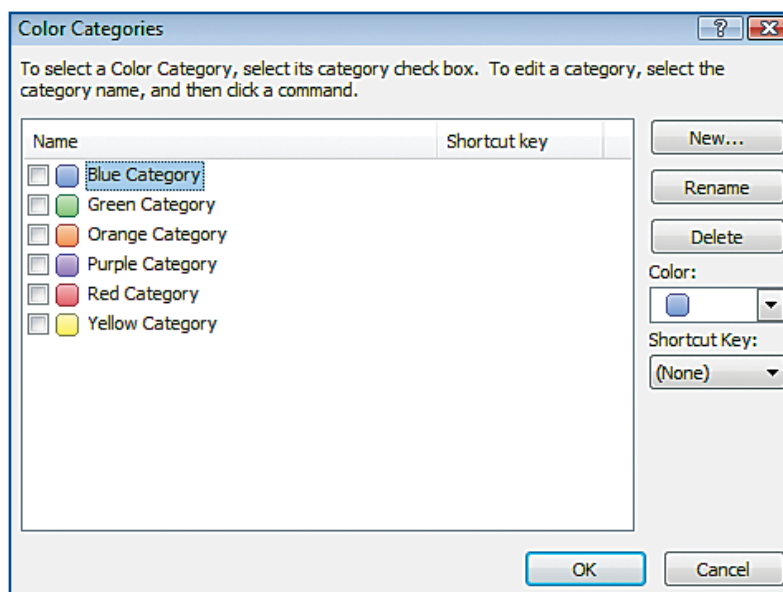
 Continue to the next exercise.

## EXERCISE 4-15 Search Items by Category

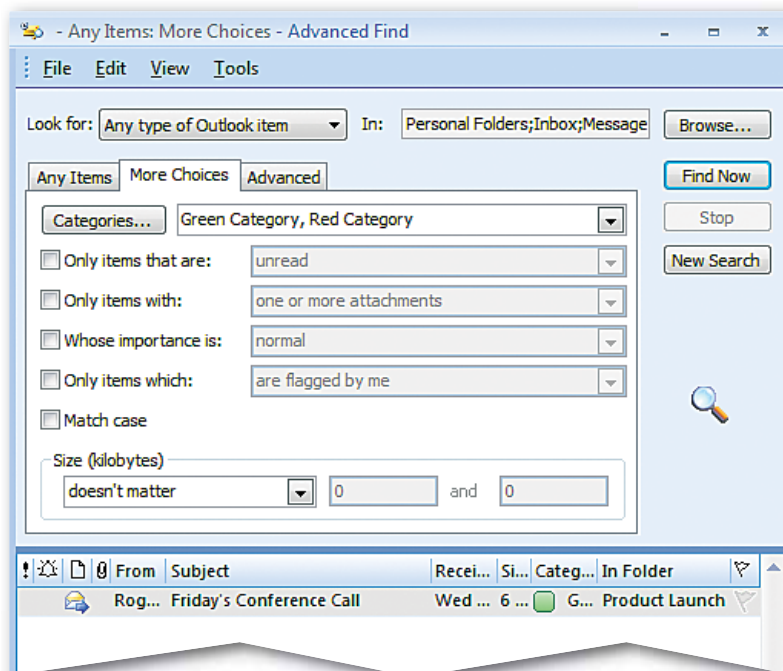


Outlook allows you to search for more than just specific text and names. You can also search Outlook items by **category**, or type, so that you can group messages or other related items. For example, you could search for business-related messages, personal messages, or all items related to a specific event.

**FIGURE 4.41** Color Categories dialog box



**FIGURE 4.42** Advanced Find dialog box



## Step-By-Step

- 1 In the **Navigation** pane, click **Mail**.
- 2 On the **Menu** bar, choose **File>New>Search Folder**.
- 3 In the **New Search Folder** dialog box, under **Mail from People and Lists**, select **Mail sent directly to me**.
- 4 **CHECK** Your dialog box should look like Figure 4.43.
- 5 Click **OK**.
- 6 **CHECK** Your screen should look like Figure 4.44.
- 7 Under **Mail Folders**, click **Inbox**.

➔ Continue to the next exercise.

### You Should Know

Messages in search folders are stored in their original location. For example, a message can appear in both a search folder and the Inbox. Changes made to a message in a search folder will appear in both locations.

## EXERCISE 4-16 Use Search Folders

Use the **search folder** feature to search messages that meet the criteria that you set. For instance, you can search for messages that were sent directly to you. Outlook will then put all of these messages into a separate folder and help you keep them organized.

FIGURE 4.43 New Search Folder dialog box

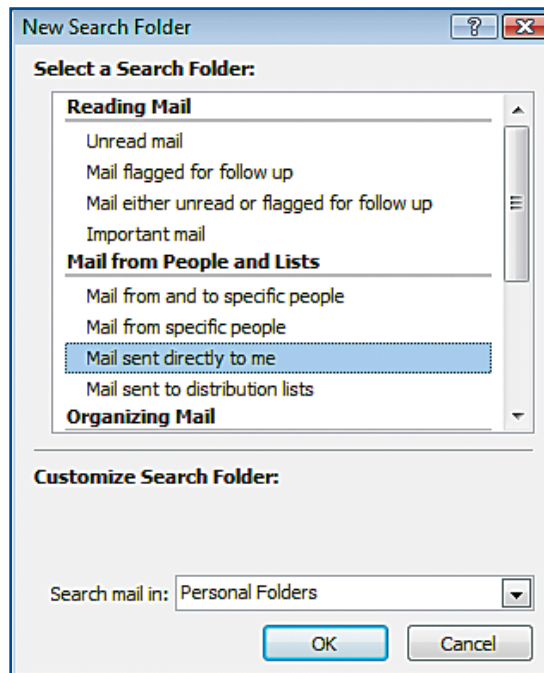
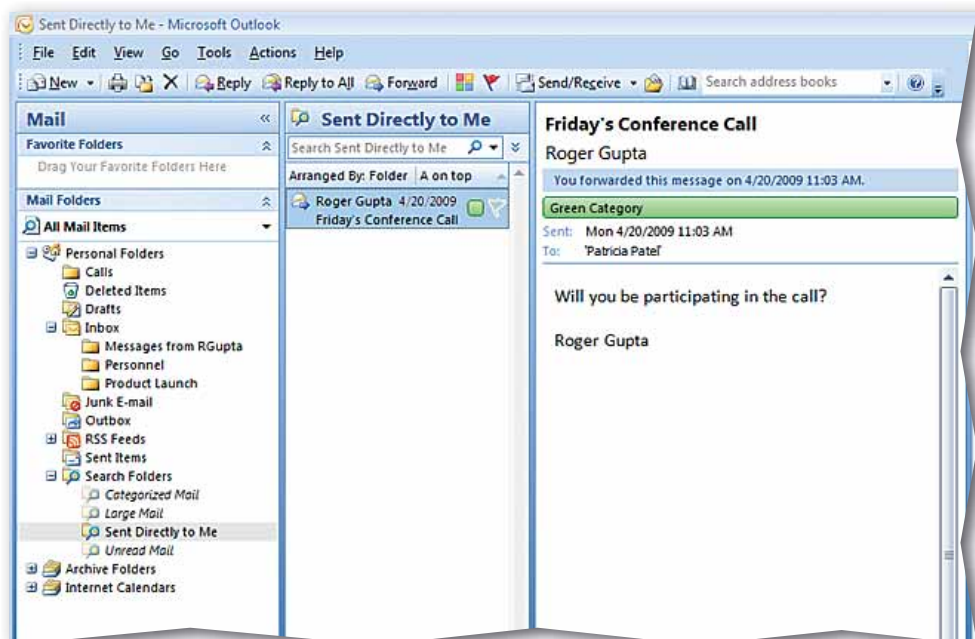


FIGURE 4.44 Sent Directly to Me folder in Search Folders



## Step-By-Step

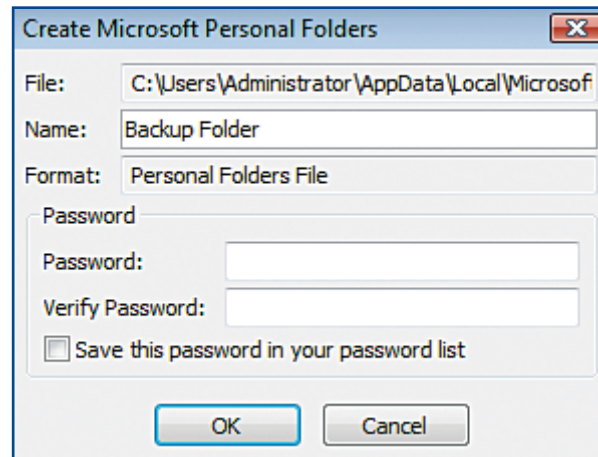
- 1 Choose **File>New> Outlook Data File**.
- 2 In the **New Outlook Data File** dialog box, select **Office Outlook Personal Folders File (.pst)**.
- 3 Click **OK**.
- 4 In the **Create or Open Outlook Data File** dialog box, click in the **File name** box and key: **Personal Folders [your first initial and last name]**.
- 5 Navigate to where your teacher tells you and click **OK**.
- 6 In the **Create Microsoft Personal Folders** dialog box, click in the **Name** box and key: **Backup Folder**. Note that you have the option to add a password to the file (see Figure 4.45).
- 7 Click **OK**.
- 8 **CHECK** Your screen should look like Figure 4.46.

➔ Continue to the next exercise.

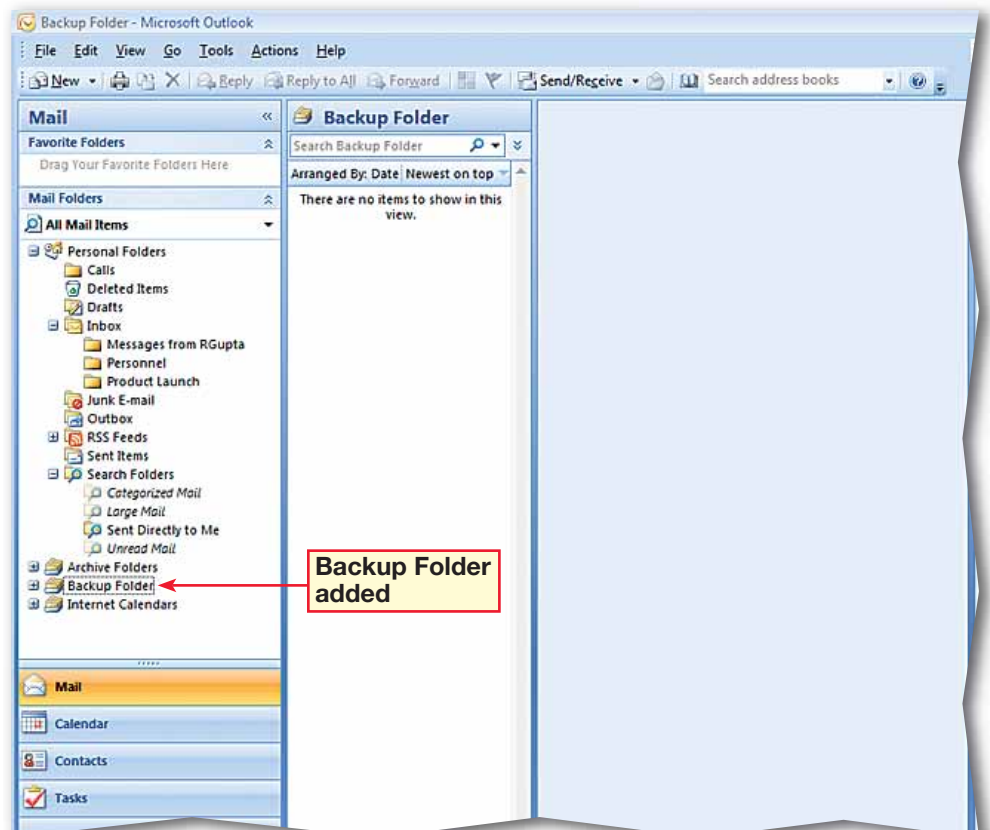
## EXERCISE 4-17 Create a Data File

Outlook allows you to create a data file to save all your data—including contacts and messages—on your computer. This is a good practice in order to keep your information backed up in case the servers storing your e-mail or other data need to be repaired.

**FIGURE 4.45** Create Microsoft Personal Folders dialog box



**FIGURE 4.46** Mail screen with Backup Folder added



## Step-By-Step

**1** In the **Navigation** pane under **Mail Folders**, right-click the **Backup Folder** and select **Close “Backup Folder”**.

**2** **CHECK** Your screen should look like Figure 4.47.

**3** Under **Mail Folders**, right-click on **Personal Folders** and select **Open Outlook Data File**.

**4** In the **Open Outlook Data File** dialog box, navigate to where you saved the **Personal Folders [your first initial and last name]** Outlook data file. Select the file and click **OK**.

**5** **CHECK** Your screen should look like Figure 4.48.

➔ *Continue to the next exercise.*

### You Should Know

The Office Outlook Personal Folders file (.pst) format introduced in Outlook 2003 offers increased storage capacity for items and folders. Files saved with the older .pst file format can be opened in Outlook 2007.

## EXERCISE 4-18

### Open and Close a Data File in a Mail Profile

Outlook can have several data files associated with any given mail profile. To add a data file to the profile, you simply open it in that profile. To remove it, you close the data file from within the profile.

FIGURE 4.47 Mail Folders with Backup Folder closed

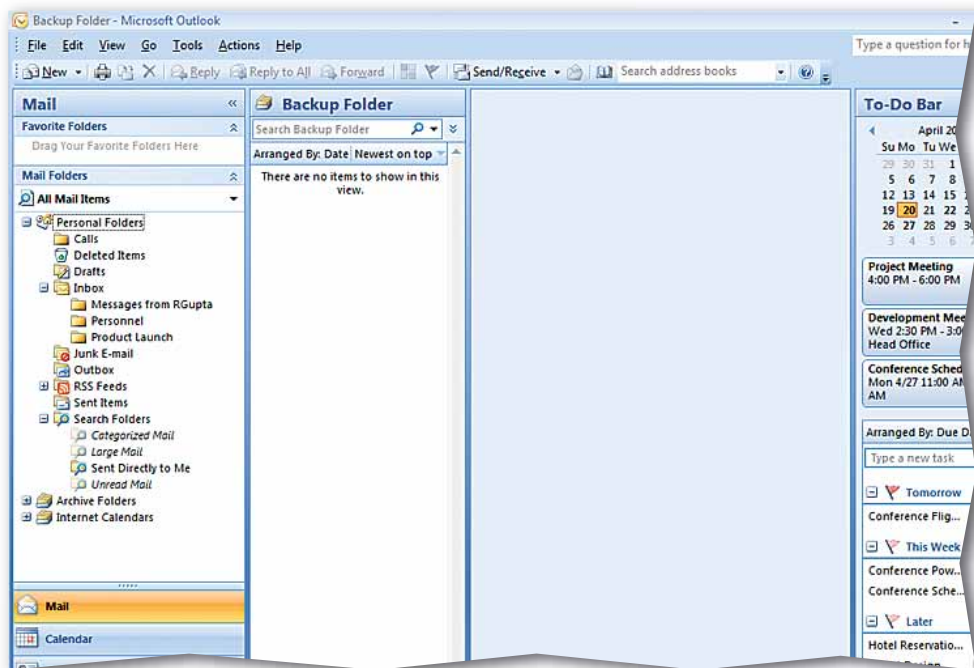
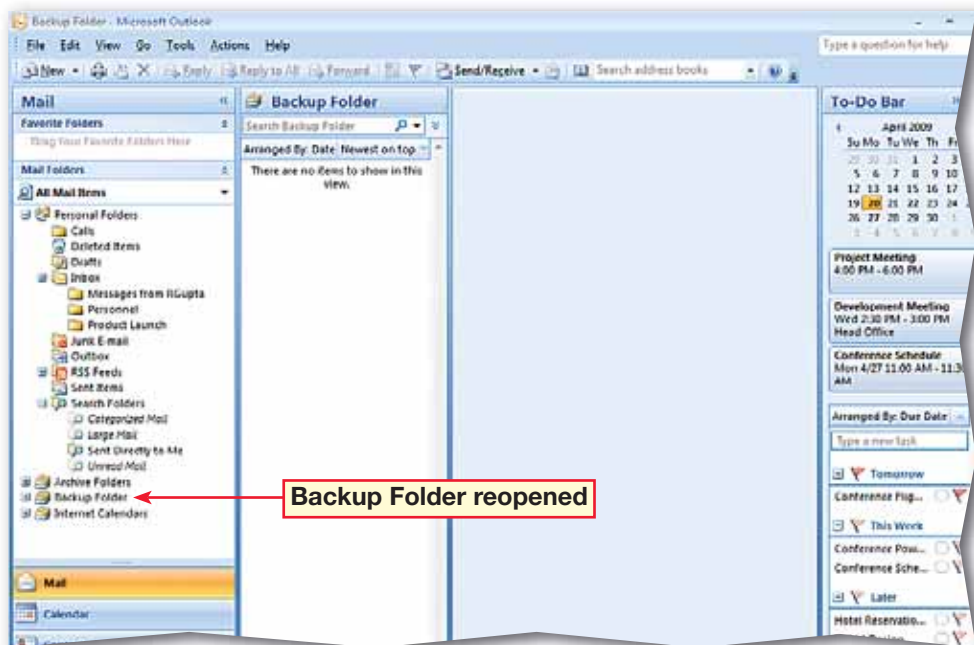


FIGURE 4.48 Mail Folders with Backup Folder opened



## Step-By-Step

- 1 In the **Navigation** pane under **Mail Folders**, right-click the **Backup Folder** and select **Properties for "Backup Folder"**.
- 2 In the **Backup Folder Properties** dialog box, click **Advanced** (see Figure 4.49).
- 3 In the **Personal Folders** dialog box in the **Name** box, highlight **Backup Folder** and key: **Secondary Folders**.
- 4 Click **OK**.
- 5 Click **OK** in the **Backup Folder Properties** dialog box.
- 6 **CHECK** Your screen should look like Figure 4.50.

➔ Continue to the next exercise.

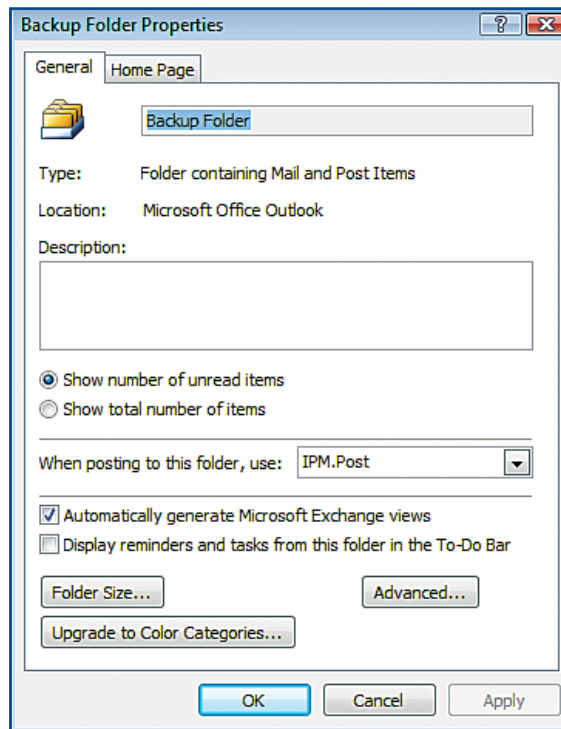
### Microsoft Office 2007

In Outlook 2007, you can also create Offline Folder files (.ost) that allow you to work with your messages when you cannot connect to the mail server.

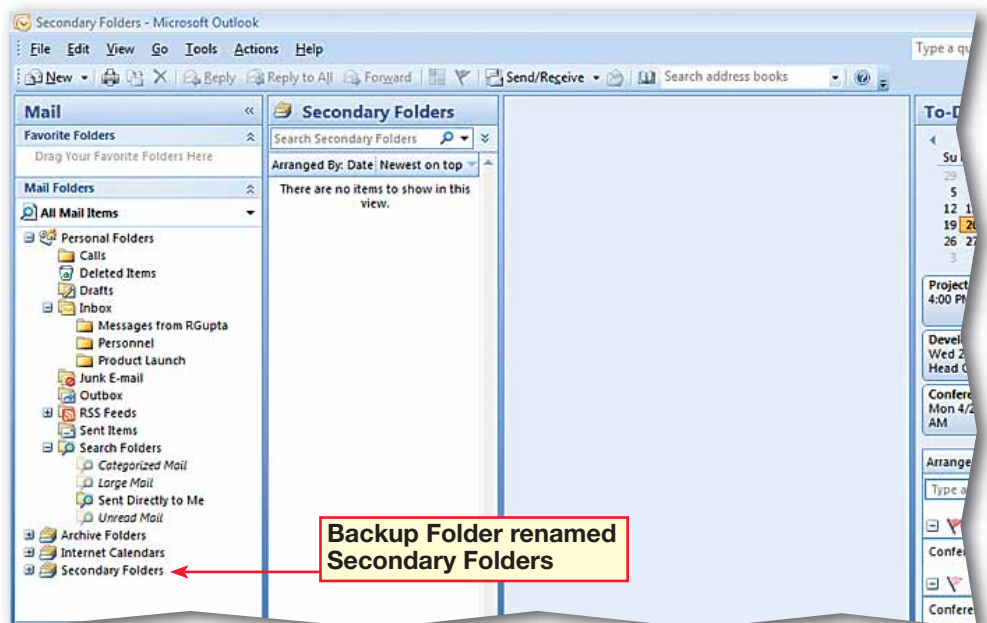
## EXERCISE 4-19 Change Data File Settings

Outlook allows you to change the data file settings in order to personalize the file and make it easier for you to organize and use.

**FIGURE 4.49** Backup Folder Properties dialog box






**FIGURE 4.50** Mail view with Backup Folder name changed





## Step-By-Step

- 1 Click **Minimize the To-Do Bar**  at the top of the **To-Do Bar** window.
- 2 **CHECK** Your screen should look like Figure 4.51.
- 3 Click **Expand the To-Do Bar**  to return the pane to its original view.
- 4 Click **Close To-Do-Bar** .
- 5 **CHECK** Your screen should look like Figure 4.52.
- 6 On the **Menu bar**, choose **View>To-Do Bar>Normal**. Note that the **To-Do Bar** is returned to its original size.

 Continue to the next exercise.

### Shortcuts

You can also open, minimize, or close the **To-Do Bar** by pressing

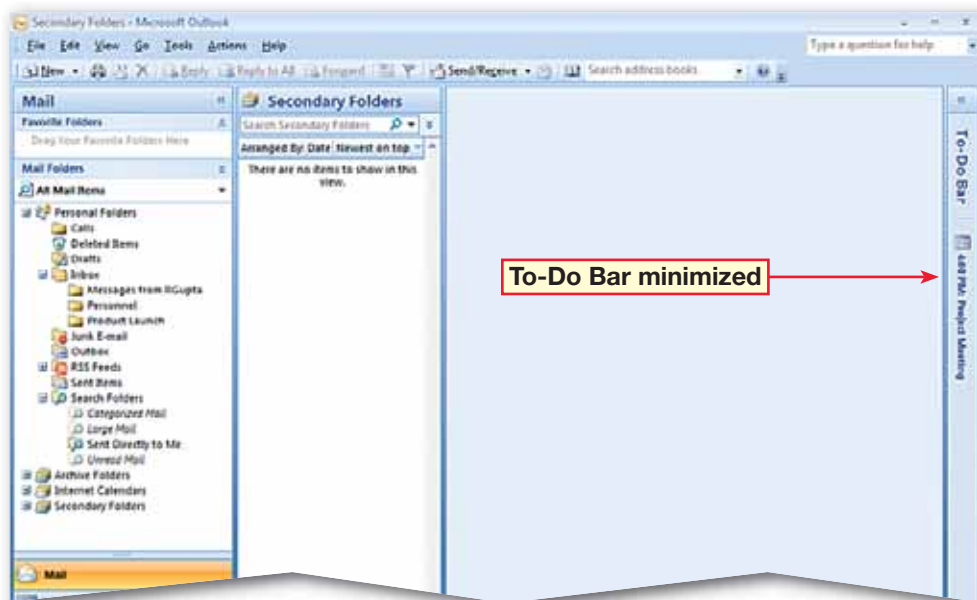
 + .

## EXERCISE 4-20

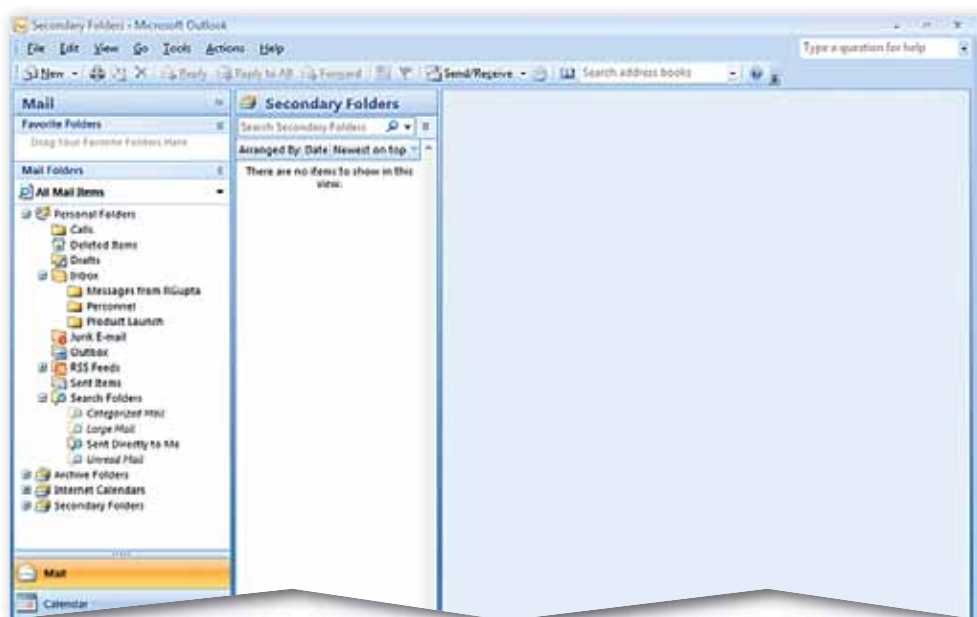
### Show, Hide, and Minimize the To-Do Bar

The To-Do Bar is a helpful feature of Outlook that can make many tasks easier and quicker. However, sometimes you may want the extra screen space to allow for a bigger view or more information in one of Outlook's other feature panes. You can hide or minimize the To-Do Bar in order to gain this space.

**FIGURE 4.51** To-Do Bar minimized



**FIGURE 4.52** To-Do Bar closed



## Step-By-Step

- 1 On the **Menu** bar, choose **View>To-Do Bar>Options**.
- 2 In the **To-Do Bar Options** dialog box, under **Show Date Navigator**, select the text in the **Number of month rows** box. Key: 3.
- 3 Remove the check from the **Show Task List** box.
- 4 **CHECK** Your dialog box should look like Figure 4.53.
- 5 Click **OK**.
- 6 **CHECK** Your screen should look similar to Figure 4.54.

➔ Continue to the next exercise.

### You Should Know

To change the size of the **To-Do Bar**, place your mouse pointer over the edge of the **To-Do Bar** until it becomes a two-headed arrow. Then, click and drag to resize.

## EXERCISE 4-21 Customize the To-Do Bar

You can do more than just minimize or hide the To-Do Bar. Outlook allows you to customize the To-Do Bar view so that it shows multiple months, appointments, or your Task List.

FIGURE 4.53 To-Do Bar Options dialog box

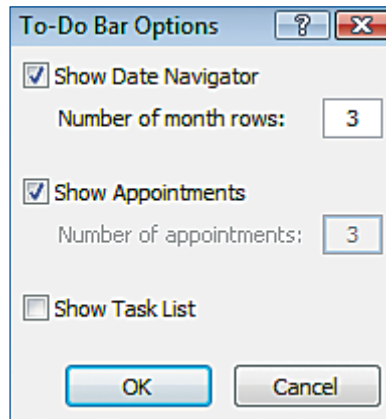
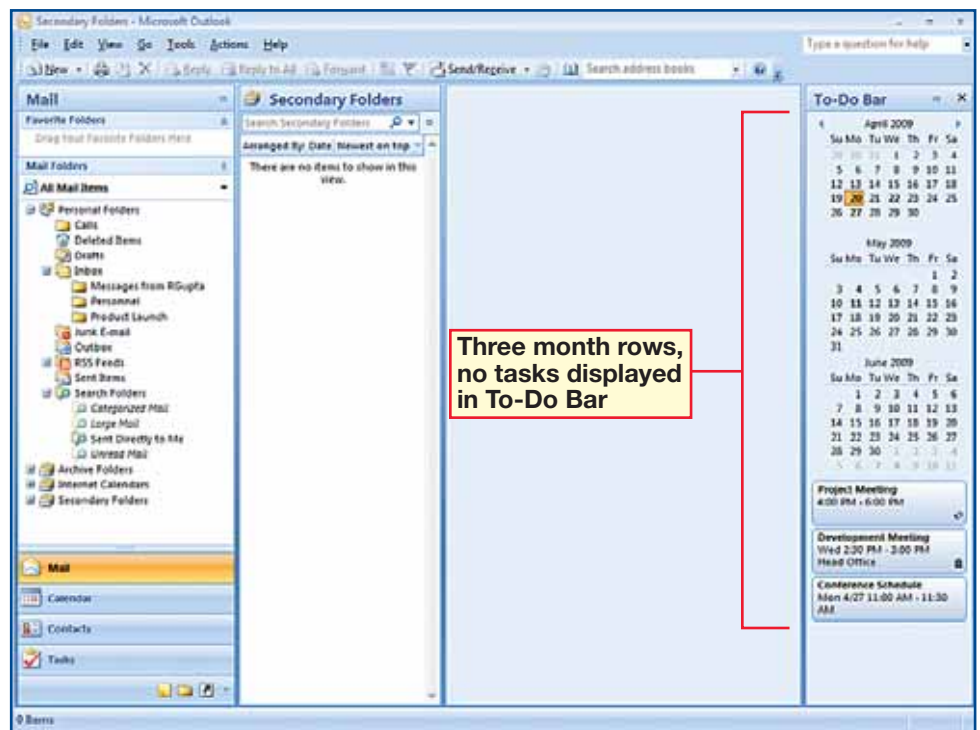




FIGURE 4.54 To-Do Bar with new options



## Step-By-Step

- 1 On the **Menu** bar, choose **Tools>Options**.
- 2 Click the **Mail Format** tab. Under **Stationery and Fonts**, click **Stationery and Fonts**.
- 3 In the **Signatures and Stationery** box, under **Theme or stationery for new HTML e-mail message**, click **Theme**. Select **Blends**. Click **OK**.
- 4 Under **Composing and reading plain text messages**, click **Font**. Under **Font**, select **Arial**. Click **OK** three times.
- 5 Select **New Mail Message** .
- 6 **CHECK** Your screen should look like Figure 4.55. Close the message.
- 7 Choose **Tools>Options**. Click the **Mail Format** tab.
- 8 Under **Message Format**, click the **Compose in this message format** drop-down arrow. Select **Plain Text**. Click **Apply**. Click **OK**. Click **New Mail Message** .
- 9 **CHECK** Your screen should look like 4.56.

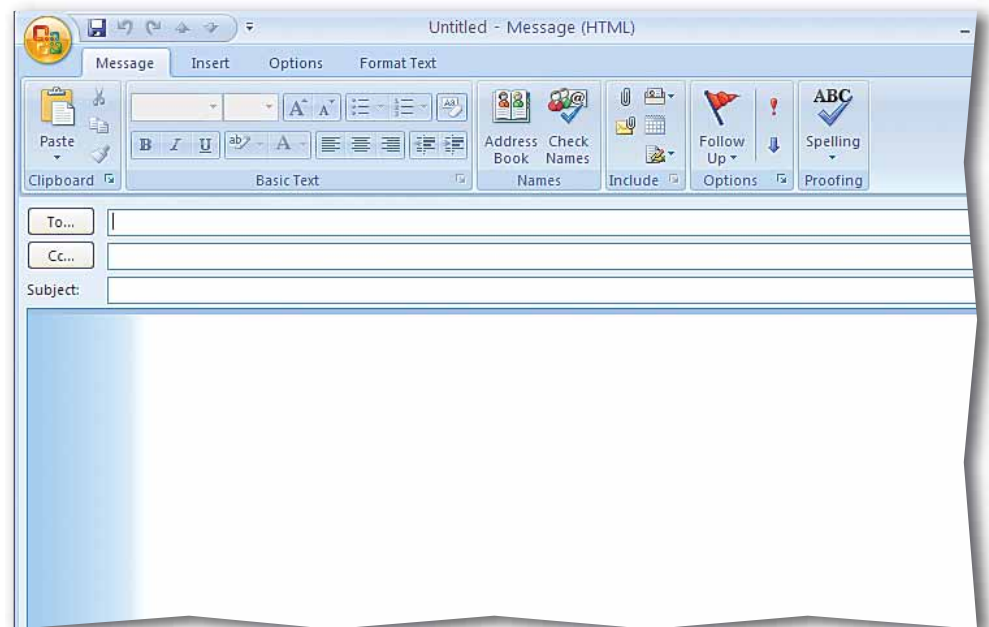
 Continue to the next exercise.

## EXERCISE 4-22

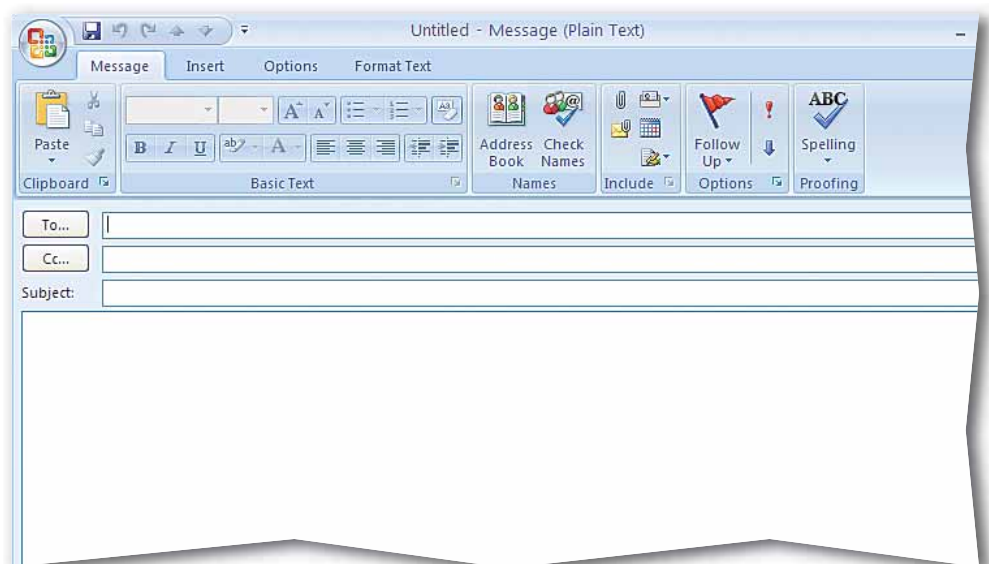
### Select the Default Format for Messages

Outlook e-mail messages are sent with a default **message format** that will **determine**, or regulate, whether you can add different fonts or pictures or other effects to the message. It is important to know how to change your default format because some recipients may have applications that do not support the more complicated formats. For example, if you choose plain text as your default format option, you would not be able to use any of the formatting options on the Menu bar.

**FIGURE 4.55** Blends Theme e-mail



**FIGURE 4.56** Plain Text e-mail



## Step-By-Step

- 1 On the **Menu** bar, choose **Tools>Account Settings**. Select your e-mail account profile. Click **Change**.
- 2 In the **Change E-mail Account** dialog box, click **More Settings**.
- 3 In the **Internet E-mail Settings** dialog box, click the **Connection** tab.
- 4 **CHECK** Your screen should look like Figure 4.57.
- 5 Under **Outlook Anywhere**, check **Connect to Microsoft Exchange using HTTP**.
- 6 Click **Exchange Proxy Settings**. Under **Connection settings**, in the **http://** box, key the URL provided by your teacher.
- 7 Under **Proxy authentication settings**, click the drop-down arrow and select the option given by your teacher. Click **OK**.
- 8 In the **Internet E-mail Settings** dialog box, click **OK**. Click **Next** in the **Change E-mail Account** dialog box (see Figure 4.58). Click **Finish**.
- 9 Click **Close**. Close Outlook.

## EXERCISE 4-23

### Access Outlook through the Internet

Outlook can provide you a way to access your Outlook e-mail even when you are not in front of your own computer. The Outlook Anywhere feature will **enable**, or allow, you to log in to your profile online through the World Wide Web.

FIGURE 4.57 Internet E-mail Settings dialog box

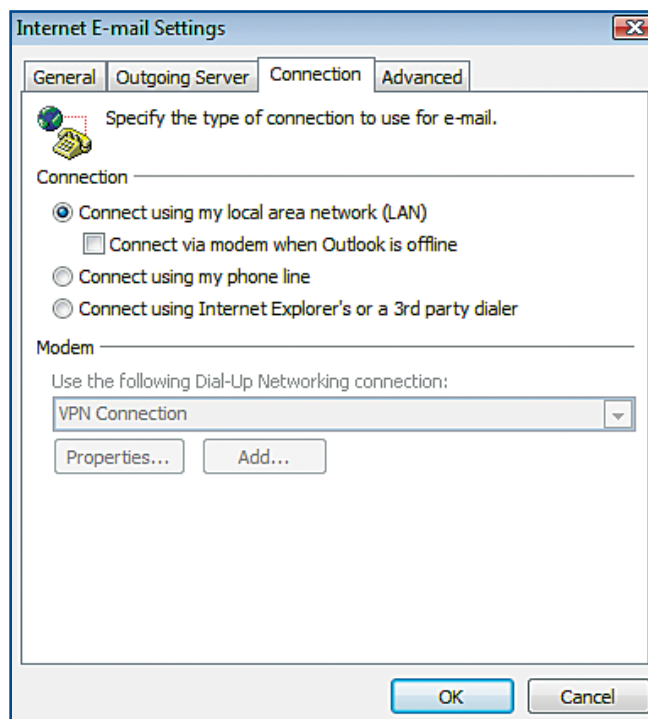
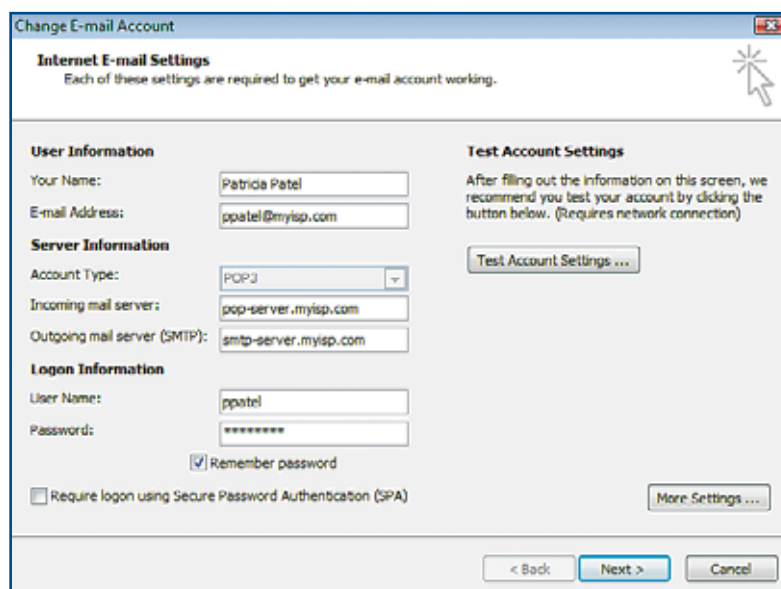


FIGURE 4.58 Change E-mail Account dialog box





## Vocabulary

### Key Terms

AutoArchive

category

distribution list

message format

rule

search folder

### Academic Vocabulary

determine

distinguish

enable

### Review Vocabulary

Complete the following statements on a separate piece of paper. Choose from the Vocabulary list on the left to complete the statements.

1. Use \_\_\_\_\_ to move older messages automatically from your Inbox and message folders to another location. (p. 116)
2. A(n) \_\_\_\_\_ shows views of messages that contain a certain word or phrase. (p. 121)
3. Use a(n) \_\_\_\_\_ to sort messages automatically into appropriate folders. (p. 108)
4. A(n) \_\_\_\_\_ is a group of e-mail addresses that are saved under one name. (p. 100)
5. Outlook Anywhere can \_\_\_\_\_ you to log in to Outlook over the World Wide Web. (p. 128)

### Vocabulary Activity

6. Select five vocabulary words and create a word search.
  - On grid paper, create a box that is 15 units by 15 units.
  - Using one unit per letter, write each vocabulary word vertically, horizontally, or diagonally in the grid.
  - Fill in the remaining cells with various letters.
  - For each vocabulary word, write a definition of the term in your own words. Have a classmate identify the words and find them in the puzzle.

### Review Key Concepts

Answer the following questions on a separate piece of paper.

7. What is the fastest way to move items between folders? (p. 115)
 

A. Click and drag.	C. Double-click a field name.
B. Tools>Actions>Move Items.	D. Right-click and select Move To.
8. How do you empty the Junk E-mail folder? (p. 107)
 

A. Right-click, select all and click Delete while holding Shift.	C. Right-click and select Empty "Junk E-mail" Folder.
B. Tools>Actions>Delete Junk Mail.	D. Select the Junk E-mail folder and click Empty.
9. Which feature would you use to search for messages that were sent directly to you? (p. 121)
 

A. Data File	C. Search Folder
B. Organize	D. Rules and Alerts
10. Where is the Date Navigator located in the Mail view? (p. 126)
 

A. The Navigation pane	C. The Reading pane
B. The To-Do Bar	D. In the folder list

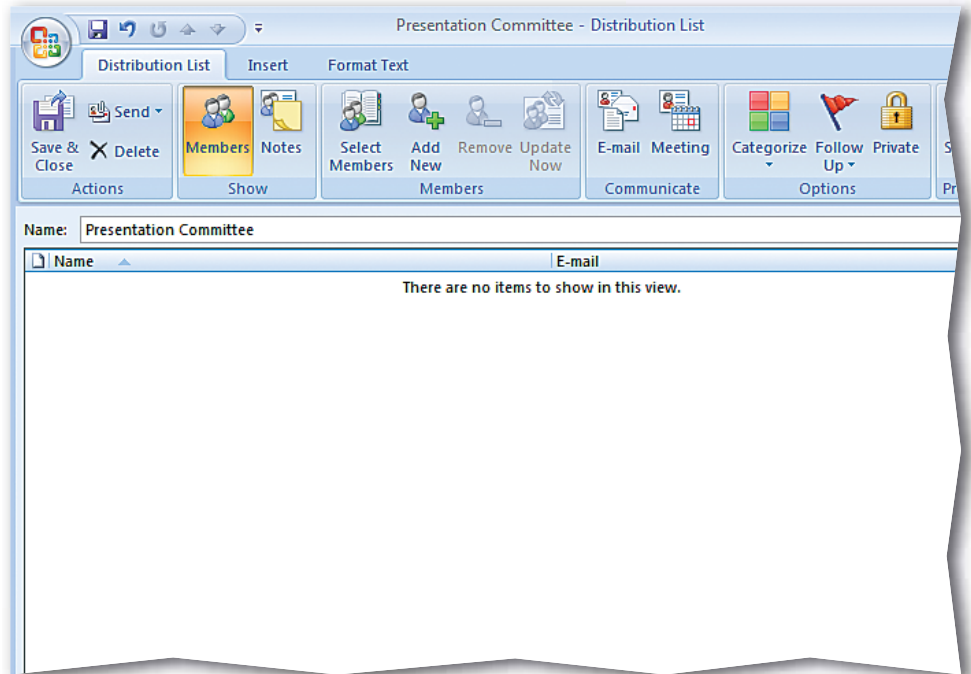
## Step-By-Step

- 1 Start Outlook. Click **Contacts**.
- 2 Choose **File>New>Distribution List**.
- 3 In the **Name** box, key: **Presentation Committee**.
- 4 **CHECK** Your screen should look like Figure 4.59.
- 5 Choose **Members>Select Members**.
- 6 Using **CTRL**, select two classmates.
- 7 Click **Members**. Click **OK**.
- 8 **CHECK** Your screen should look similar to Figure 4.60.
- 9 Click **Save & Close**.
- 10 Exit Outlook.

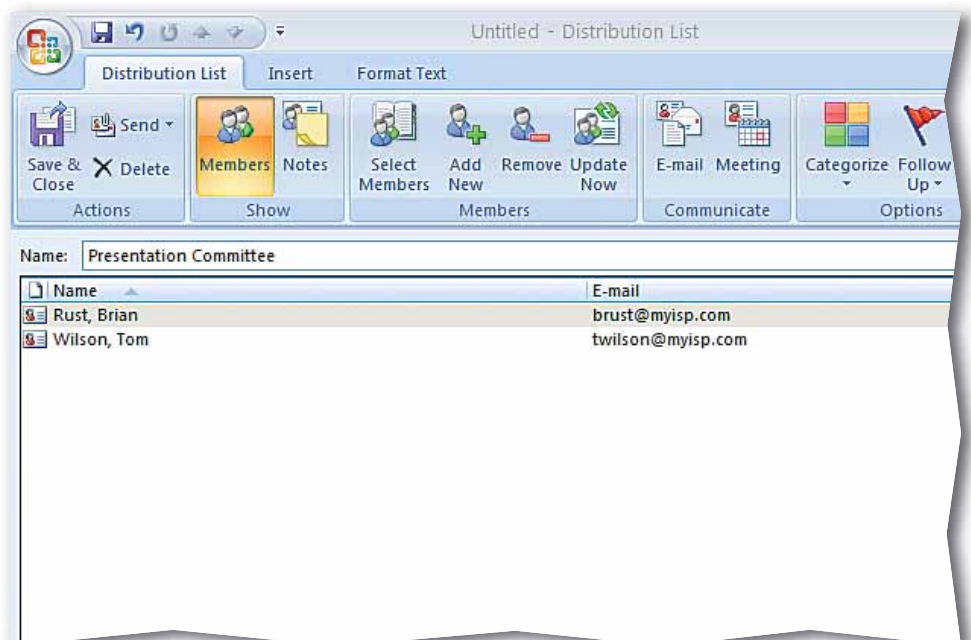
## 1. Create Distribution Lists

Follow the steps to complete the activity.


**FIGURE 4.59** New Distribution List name



**FIGURE 4.60** New Distribution List



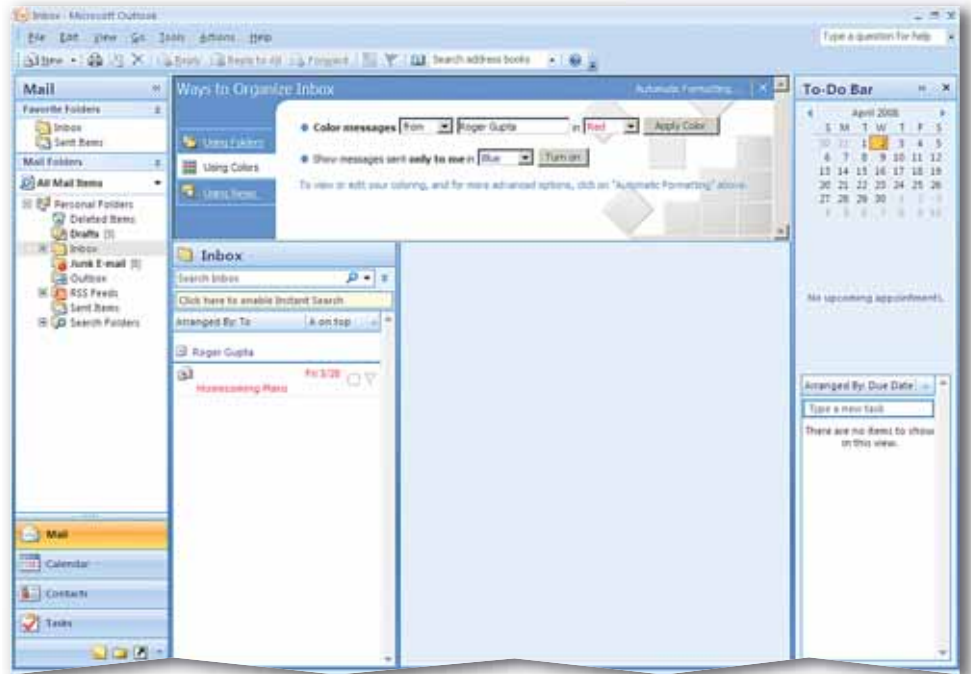
## Step-By-Step

- 1 Send a message to an assigned classmate. In the **Subject** box, key: **Homecoming Plans**. In the message body, key: **Are you going to the game?**
- 2 Click the **Homecoming Plans** message you receive from your assigned classmate.
- 3 Choose **Tools>Organize**.
- 4 Click **Using Colors**. Select **Red**. Click **Apply Color**. Deselect the message.
- 5 **CHECK** Your screen should look like Figure 4.61.
- 6 Click **Using Views**. Under **Change your view**, select **Last Seven Days**.
- 7 Click **Close Organize** .
- 8 **CHECK** Your screen should look like Figure 4.62.
- 9 Choose **View>Current View>Messages**.
- 10 Exit Outlook.

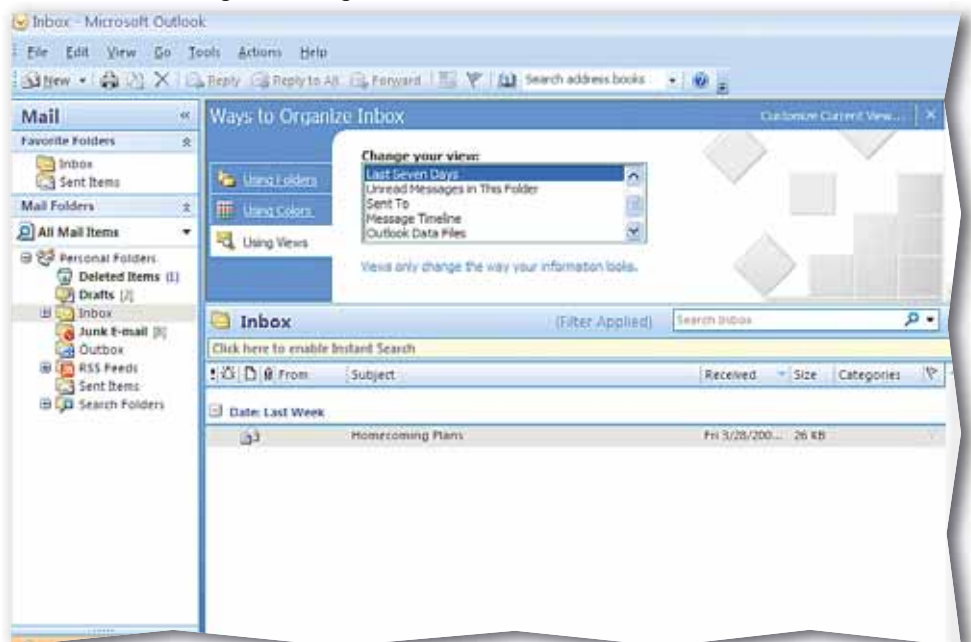
## 2. Organize Using Colors and Views

Follow the steps to complete the activity.

**FIGURE 4.61** Organize using colors



**FIGURE 4.62** Organize using views



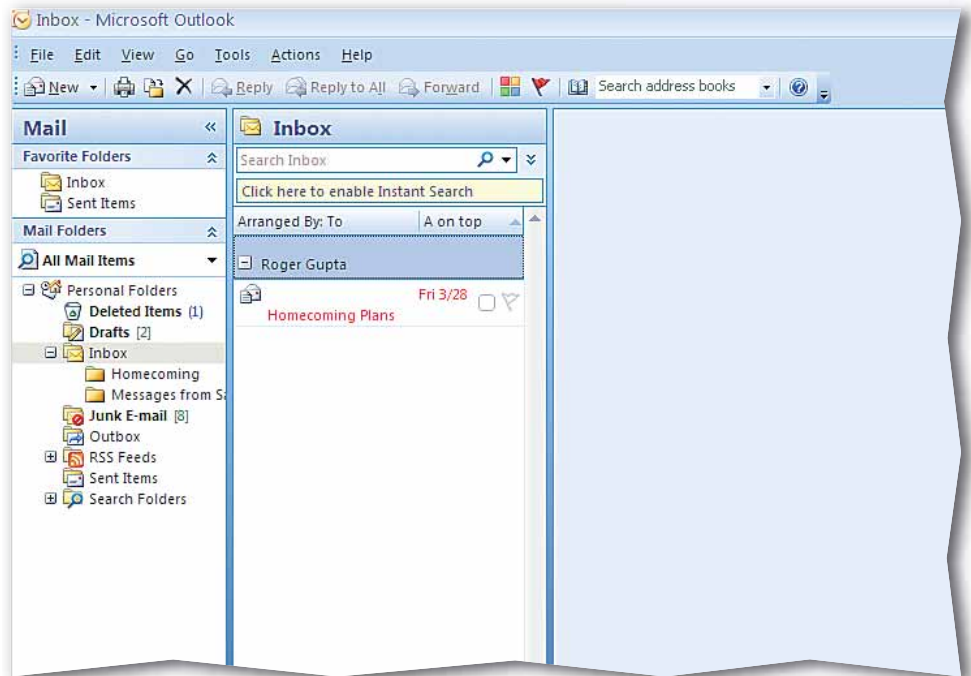
## Step-By-Step

- 1 Click on the **Inbox** folder. Choose **File>New>Folder**.
- 2 Name the folder: **Homecoming**. Click **OK**.
- 3 **iCHECK** Your screen should look like Figure 4.63.
- 4 In the **Inbox**, right-click the **Homecoming Plans** e-mail and select **Move to Folder**.
- 5 In the **Move Items** dialog box, click the **Homecoming** folder. Click **OK**.
- 6 Click the **Homecoming** folder.
- 7 **iCHECK** Your screen should look like Figure 4.64.
- 8 Exit Outlook.

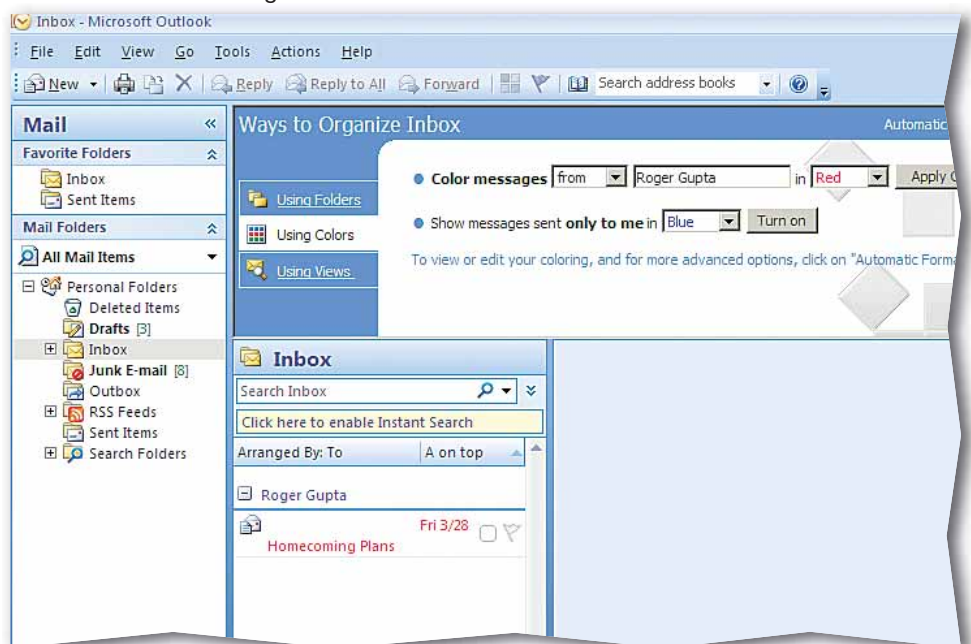
## 3. Create Folders and Move Items between Folders

Follow the steps to complete the activity.

**FIGURE 4.63** New Folder



**FIGURE 4.64** Message moved





## Step-By-Step

**1** In the **Navigation** pane, select **Personal Folders**. Choose **File>New>Folder**. Create a master folder named **Spring/Summer catalog**.

**2** In the master folder, create three folders named:

- **Canoeing and kayaking**
- **Hiking and camping**
- **Running**

**3** **CHECK** Your screen should look like Figure 4.65.

**4** Send your assigned classmate an e-mail called **New Running Shoes**.

**5** In the **Inbox**, right-click the **New Running Shoes** message and select **Move to Folder**.

**6** In the **Move Items** dialog box, select the **Running** folder. Click **OK**.

**7** Click the **Running** folder.

**8** **CHECK** Your screen should look like Figure 4.66.

**9** Exit Outlook.

## 4. Plan a Sporting Goods Catalog

You work in the marketing department for a major sporting goods chain. You are planning for the release of the Spring/Summer Catalog. Product managers are going to start sending you a lot of information about their products. You decide to create a folder for each department to help you organize incoming messages.

FIGURE 4.65 Folders for departments

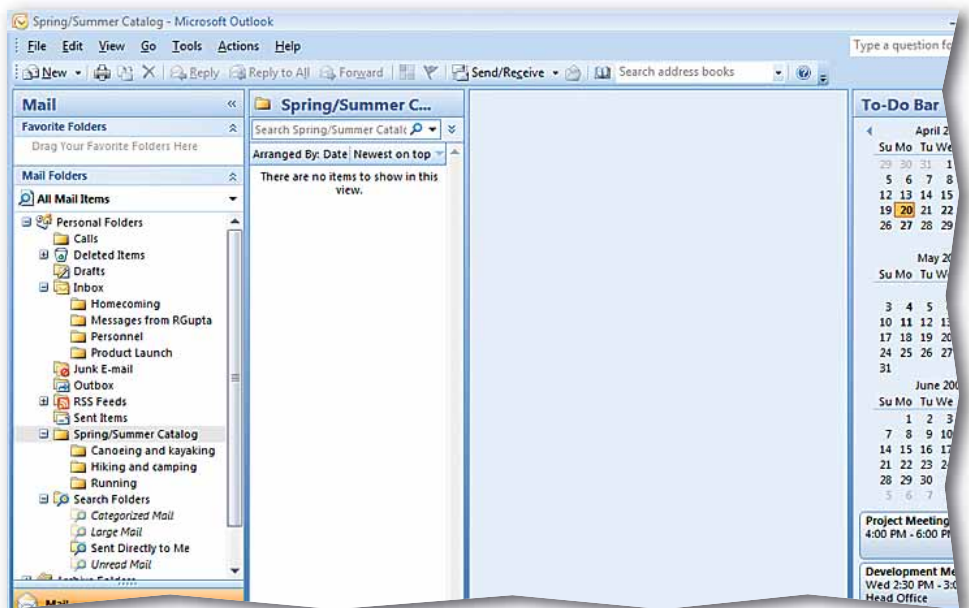
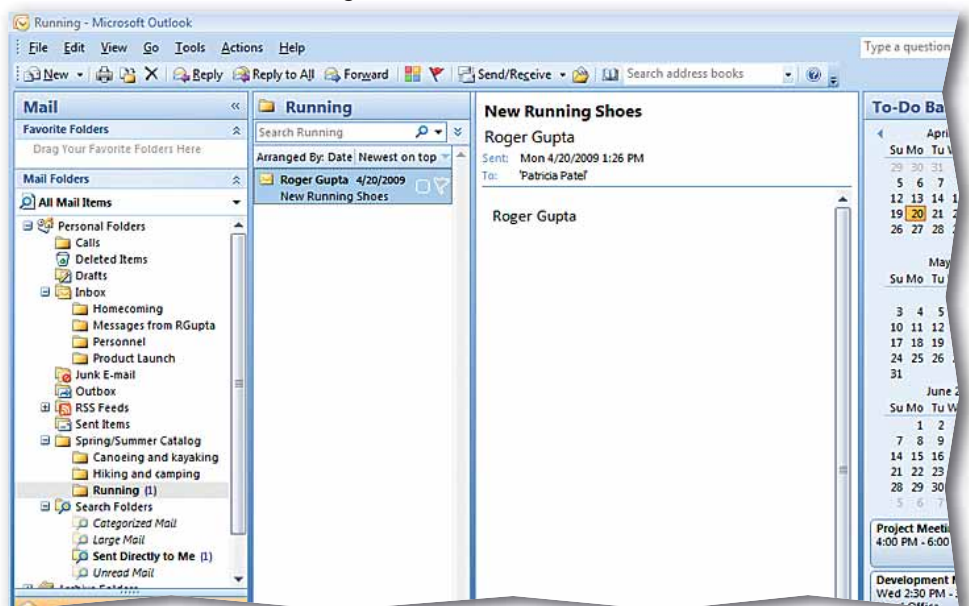


FIGURE 4.66 Moved message



## Step-By-Step

1 Send your assigned classmate three e-mails with the following

**Subjects:**

- **Movie this Saturday?**
- **Jane's birthday**
- **Concert tickets**

2 In the **Inbox**, select the **Movie this Saturday?** message. Press and hold **CTRL** while selecting the **Jane's birthday** and **Concert tickets** e-mails.

3 On the **Menu** bar, choose **Edit>Categorize>All Categories**. Select **Yellow**.

4 **CHECK** Your dialog box should look like Figure 4.67.

5 Click **No** in the renaming box.

6 Choose **View>Arrange By>Categories**.

7 **CHECK** Your screen should look like Figure 4.68.

8 Choose **View>Arrange By>Date** to return to the default view.

9 Exit Outlook.

## 5. Organize Personal E-mails

Your personal e-mails are starting to get mixed up with your business e-mails. You decide to create a category for your personal e-mails to help keep them organized.

FIGURE 4.67 Categories dialog box

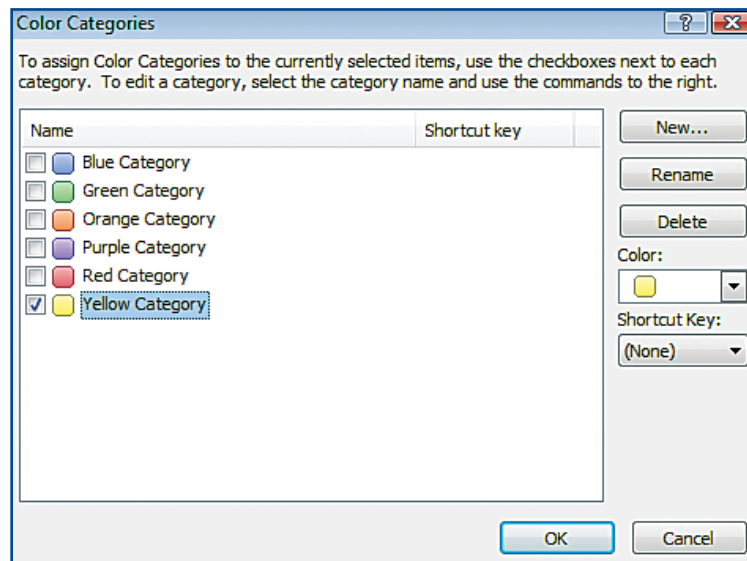
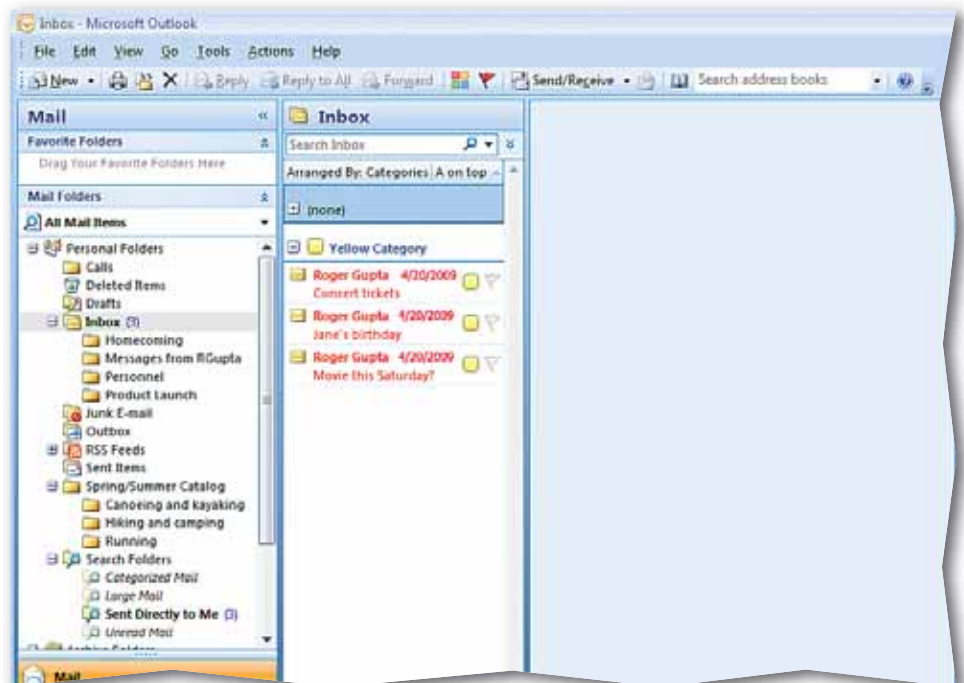


FIGURE 4.68 Arrange By Categories



## 6. Beyond the Classroom Activity



**Language Arts: Assign Items to Categories** You have a new “pen pal” from Europe, only you use e-mail instead of paper and pen to write to each other. In your Inbox, select the e-mails named **Greetings from Europe** and **How’s life in the U.S.?**

- Choose **Edit>Categorize**. Assign your pen pal’s e-mails to the **Blue** category.
- Choose **View>Arrange By>Categories**. Both of your pen pal’s e-mails should appear in the **Blue** category.

To return to the default view, choose **View>Arrange By>Date**. Then, open a Word document and key one or two paragraphs explaining how you would use color categories to improve the organization of your own e-mail account. Save your file as: **04rev-[your first initial and last name]6**.

## 7. Standards at Work Activity



### Microsoft Certified Application Specialist Correlation

**Outlook 5.3** *Organize mail folders*

**Move E-mails** You want backups of some of your critical e-mails, but you have personal e-mails mixed in with your business messages. Move three e-mails from your Inbox to the **Messages from [first and last name of assigned classmate]** folder.

On a separate sheet of paper, write one or two paragraphs explaining why you think it is important that you keep business and personal e-mails separate. Save your file as: **04rev-[your first initial and last name]7**.

## 8. 21st Century Skills Activity

**Organize with Rules** You can use Outlook tools such as rules to help keep your messages organized. Follow these steps to organize your e-mails with rules:

- Create a new folder named: **Messages from [first and last name of assigned classmate]**.
- Create a rule that automatically sends messages from your assigned classmate to that folder (Hint: choose **Tools>Rules and Alerts**).
- Send your assigned classmate two e-mails.
- Make sure that the two new e-mails from the classmate assigned to you were sent to the correct folder.

**Before You Begin**

**Organizing** Even the most overwhelming task can be accomplished if you plan well enough for it. Organization is the key to chipping away at a seemingly impossible workload. By breaking down the job into individual, manageable tasks, you are organizing your own success.

**Reflect** Once you complete the projects, open a Word document and answer the following questions:

1. How does organization help you share the workload of a particular task among project members?
2. How can Outlook help eliminate any confusion between project members?

**9. Start a Book Club**

**Language Arts: Create a Distribution List** You and your friends have decided to start a book club. Because your friends all have access to e-mail, you decide to use Outlook to organize the club.

In Outlook, create a distribution list named **Book Club**. Add your three vassigned classmates to the distribution list. Send to each member a message named **Book Club** with the following details:

- The club's mission statement
- List of club members
- A proposed list of two books to read and discuss.

**10. Search for Club Messages**

**Language Arts: Use Instant Search** Searches can help you sort e-mails and locate specific messages quickly. You decide to use a search to locate your book club messages.

Send the following three messages to the classmate assigned by your teacher:

- First Book Club Meeting
- Proposals for Book Club
- Nominations for Book Club President

Use an instant search for e-mails that contain the words **book club**. Once you have applied the search, four e-mails should appear on your screen. Choose **View>Current View>Messages** to display all of your messages again.

**11. Organize Your Inbox**

**Language Arts: Organize by Color** Your Inbox is filled with various e-mail messages and you realize that you can use the properties of Outlook to help you get organized. You decide to use color to help you keep track of the book club messages.

- Select one of the book club messages in your Inbox.
- Change the color of this message to red.
- One at a time, change the color of the remaining book club messages.
- Create a folder named **Book Club**.
- Move all of your book club messages to this folder.

Open a Word document and key a paragraph that describes how you would use color to add visibility to items in your Inbox at work. Save the file as: **04rev-[your first initial and last name]11**.

