Microsoft

Student Guide

40569A
Microsoft Outlook associate 2019

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Module 1: Getting started with Outlook

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Module overview

Description

Microsoft Outlook 2019 is an app in the Microsoft Office suite that you can use to communicate with others, track your schedule, manage your contact list, and even stay on track with your to-do list. This module introduces you to Outlook and sets you up for using it at school, at home, and in the workplace.

At the end of this module, you'll be able to browse within Outlook, add an Outlook account, establish your standard working times, and create an email signature that will automatically appear in any new email messages. The skills you acquire and practice during the try-it activities, discussions, and Cornerstone project will prepare you for the next module, in which you'll start managing your emails.

The following table outlines the lessons in this module and their corresponding learning objectives.

Lesson	Learning objective	Exam objectives
Welcome to Outlook	Browse the Outlook interface and add an account.	• 1.1.2
Customizing the interface	Browse the ribbon in Outlook and customize the ribbon and the **Quick Access Toolbar**.	• None
Customizing views	Use multiple options for observing your mail, calendar, and contacts.	• 1.1.1
Setting your account preferences	Customize your calendar working times, automatic signatures, and email reply settings.	• 1.1.1 • 1.2.1 • 1.2.2 • 1.2.3 • 2.2.3 • 3.1.1

Lesson	Learning objective	Exam objectives
Cornerstone: Modifying Outlook settings	Modify your Outlook settings to accommodate extended duties at the farm.	• 1.1.1 • 1.2.1 • 1.2.2 • 1.2.3 • 3.1.1

Table 1: Objectives by lesson

Scenario

The Media and Communications department at Munson's Pickles and Preserves Farm is excited to welcome you as an intern for the upcoming year. They anticipate a busy schedule during the spring farming season and feel eager for your help with several projects. To support the upcoming communication initiatives, you'll need to become familiar with Outlook 2019 and your new account. Before you can get to work, you'll need to configure the mailbox settings for your provided account. As your list of tasks grows, you'll need to change your Outlook settings to manage your busier schedule.

Cornerstone

This module concludes with a Cornerstone project, during which you'll change the settings of your Outlook account so you can better manage your increasingly busy schedule. During the Cornerstone, you'll:

• Manage the ribbon display options.
• Modify the **Quick Access Toolbar**.
• Customize the **Mail**, **Calendar**, and **People** views.
• Update your calendar because of expanded work duties.
• Add signatures to your emails.

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Lesson 1: Welcome to Outlook

Overview

This lesson introduces you to Outlook 2019 and explains how to browse within Outlook. In this lesson, you'll create a new account that you'll use to communicate with others, manage your schedule, and track your tasks.

Warm-up

How well do you know Outlook 2019? Be prepared to share your experience with Outlook with your classmates.

Topic 1: Get to know the Outlook interface

Keeping track of your emails and attachments, to-do lists, and schedule might become challenging, especially when you're busy at school and work. Whether you're new to Outlook or previously used it, you'll find that it offers many features to help you become more productive and efficient. This topic introduces the user interface (UI) of Outlook 2019 and explains how you can browse it and find various elements.

Video

To review a video about getting to know Outlook, refer to: What is Outlook?

The following screenshot depicts the Outlook UI.
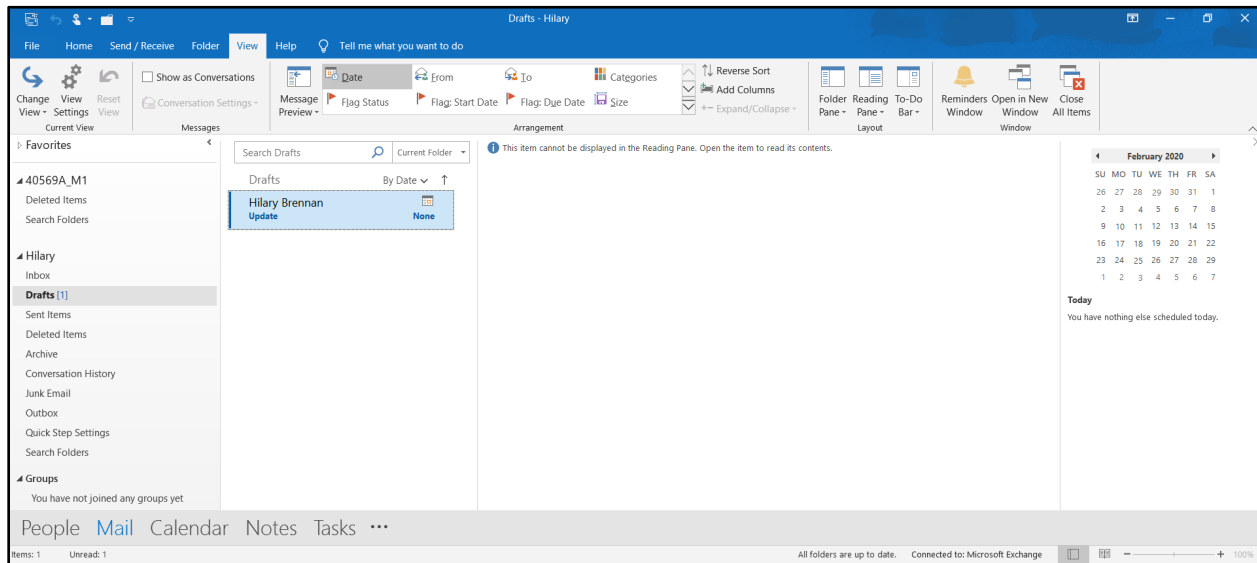
Figure 1: The Outlook interface

The following table describes the Outlook interface elements.

Tabs	Multiple tabs that you can select to reveal the ribbon commands
Microsoft Office Backstage view	A view, which is available when you select the **File** tab, where you can change the settings and options for Outlook
Ribbon	The set of tabs at the top (or beginning) of the Outlook workspace
Navigation Pane	The pane where you can switch among the **Mail**, **Calendar**, **Contacts**, **Tasks**, **Notes**, and other areas and select folders within each area
Navigation Bar	Icons at the bottom of the **Navigation Pane** that you can use to switch among the **Mail**, **Calendar**, **People**, **Tasks**, **Notes**, **Folders**, and **Shortcuts** areas
Folder Pane	The pane that displays all the folders in Outlook
Mail Pane	The pane where you can observe, select, and manage the messages in your Inbox and other folders

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Reading Pane	The pane that previews the content of your messages
To-Do Bar	A customizable pane that displays calendar, task, or people information based on your individual preferences
Status bar	The horizontal bar at the bottom of the screen that displays the status of the Outlook app
Window control	Icons to maximize, minimize, and restore the size of your Outlook window and to exit Outlook

Table 2: The elements of the Outlook interface

Activity: Show me how

The teacher will guide the class through each of the workspace elements and demonstrate how to identify each one.

Resources required

You'll need the following resources for this activity:

- None

Activity instructions

Follow along with your classmates as your teacher helps you to:

1. Open Outlook 2019.

2. Identify the primary elements of the Outlook workspace.

3. Use the **File** tab to explore the options in the **Backstage** view.

4. Customize the **Navigation Bar**.

5. Customize the **Reading Pane**.

6. Customize the **To-Do Bar**.

Try-it: Get to know the Outlook interface

In this leveled try-it activity, you'll assess your knowledge of the Outlook interface. You'll identify the different elements of the workspace and customize Outlook to work for you.

Try-it 1

In this try-it, you'll pair up with a classmate and identify the different UI elements in the Outlook workspace.

Resources

You'll need the following resource for this try-it:

- Open **L1_T1_try1_matching_starter.docx** in this lesson's Learning Activity Resources.

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Open **L1_T1_try1_matching_starter.docx**, and then follow the instructions to complete the matching activity.

2. Work with a classmate, compare answers, and help each other identify all the elements of the workspace.

Try-it 2

In this try-it, you'll customize the **Navigation Bar** to change the number and order of items on display.

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Change the **Navigation Bar** to display five items.

2. Disable compact navigation.

3. Reorder the links in this order: **People**, **Mail**, **Calendar**, **Folders**, **Notes**, **Tasks**, **Shortcuts**.

Try-it 3

In this try-it, you'll change the layout according to your preferences. You'll customize, resize, and move various panes.

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Hide, display, and move the **Reading Pane**.

2. Minimize and maximize the **Folder Pane**.

3. Customize the **To-Do Bar**.

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Topic 2: Add an account to Outlook

Before you can use Outlook, you need to configure an email account. Your school, your organization, or another provider will supply the settings for this account.

An Outlook account helps you access and manage email messages, calendars, contacts, and tasks. Depending on your preference, you can also create your Outlook account by adding it from Office 365 or from one of several third-party email providers.

Understand the types of email accounts

The following table describes the types of accounts you can add to Outlook.

Office 365 or Microsoft Exchange Server	Businesses of all sizes that use the Microsoft platform (either onsite or in the cloud) to manage their email accounts use Exchange Server for the primary email format. When used with Outlook, Exchange Server accounts make the greatest number of capabilities available, such as out-of-office messages, the sharing of calendars and contacts, and the use of the **Scheduling Assistant** for managing meetings.
Post Office Protocol version 3 (POP3)	POP3 is the standard format for most web-based email providers and offers the most-common and most-flexible type of email account. POP-3 can be used to connect to most mailboxes. The content is stored on a server and delivered to Outlook in a folder structure. Depending on the email provider, the folders—such as **Email**, **Calendar**, and **Tasks**—might vary, and some of the more-advanced features of Outlook might not be available.
Internet Message Access Protocol (IMAP)	Large organizations, such as corporations and universities, commonly use IMAP accounts. As with Exchange Server accounts, messages stay on the server, but you can access your mailbox by using the Outlook app.

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HTTP	HTTP accounts, such as MSN.com and Outlook.com accounts, primarily access web-based email. As with Exchange Server and IMAP accounts, messages stay on the server, and you can observe or manage your mailbox by either signing in on the web or using the Outlook app. The features of an HTTP account tend to be limited.

Table 3: Types of email accounts

The newer versions of Outlook have evolved to the point that the app can usually figure out the setup details without you having to know about usernames, authentication protocols, and server protocols. Occasionally, you might need to have some support and manually set up the account, but for the most part, the **Outlook Account Wizard** does all the hard work for you.

Additional information

For more information, refer to: POP and IMAP email settings for Outlook

Activity: Show and tell

In this activity, your teacher will demonstrate how to add a new account to Outlook.

Resources required

You'll need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Observe your teacher demonstrate the process of adding an account to Outlook.

2. Discuss the demonstration, and ask questions.

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Try-it: Add an account to Outlook

In this standalone try-it, all the students will add an email account to Outlook. Depending on your organization, your ability to do so might be limited. If your organizational settings prevent you from completing the steps in this activity, let your teacher know at what point you had to stop.

Resources

You'll need the following resource for this try-it:

- A school or web-based email account

Instructions

The following are the general tasks that you need to perform during this try-it:

1. On the **File** tab, in the details pane, select **Add Account**.

2. Follow the steps to add your account to Outlook.

3. Exit and then restart Outlook to start using your email account.

Additional information

Some email providers require specialized settings that don't work with the **Outlook Account Wizard**. If you have issues adding an account, you might need to manually add the account or use the advanced setup options. For more information, refer to: Add an email account using advanced setup

Video

If you can't add an account because of restrictions by your organization, review the Add an email account to Outlook video.

Wrap-up

Consider your comfort level with Outlook at the beginning of the module. Did you feel that you could find and browse your Outlook workspace? What's your comfort level now?

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Use these questions to check what you learned in this lesson:

1. Which of the following elements can you change to customize your workspace in Outlook?

   Select the correct option.

   a. **Navigation Pane**

   b. **Reading Pane**

   c. **To-Do Bar**

   d. All of the preceding answers

2. On which tab do you find the options to customize the **Reading Pane**?

   a. **File** tab

   b. **Folder** tab

   c. **Help** tab

   d. **View** tab

3. To add an account to Outlook, you use the following steps.

   Indicate the correct sequence by adding numbers 1–4 next to the following items.

   a. Select the **File** tab. - _____

   b. Provide the email address. - _____

   c. Provide the password. - _____

   d. Add the account. - _____

4. Which type of account do businesses and universities use the most?

   Select the correct option.

   a. POP3

   b. IMAP

   c. Exchange Server

   d. HTTP

Lesson 2: Customizing the interface

Overview

In this lesson, you'll learn about the ribbon and tabs in Outlook and how you can customize the ribbon to maximize the efficiency of your tasks. You'll also learn to use and customize the **Quick Access Toolbar** so the options you use most often will be more-quickly available to you.

Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. The element at the top (or beginning) of the window that has a lot of options is commonly known as the _____

   Fill in the blank space.

2. What's the name of the toolbar you can customize to have easy access to the commands you often use in Outlook?

   Select all that apply.

   a. **Shortcuts Bar**

   b. **Navigation Bar**

   c. **Quick Access Toolbar**

   d. **Options** tab

3. In which of the following ways can you customize the Outlook interface?

   Select all that apply.

   a. Add and remove tabs

   b. Change the icons on the buttons

   c. Create contextual tabs

   d. Create your own tabs that have groups and buttons

Getting started with Outlook

4. Which of the following tabs exist on the ribbon in all areas of Outlook?

   Select all that apply.

   a. **Insert**

   b. **Format Text**

   c. **Message**

   d. **Help**

Topic 1: Customize the ribbon

The ribbon in Outlook resides at the top (or beginning) of the window and supplies options on different tabs. The following screenshot depicts the ribbon and points out the tabs.
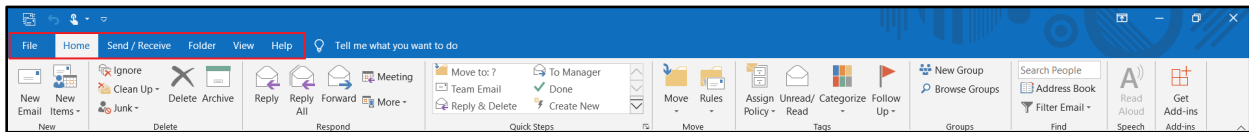
Figure 2: The Outlook ribbon tabs

Understand the ribbon display options

You can manage your display of the ribbon by selecting **Ribbon Display Options**, which the following screenshot points out.
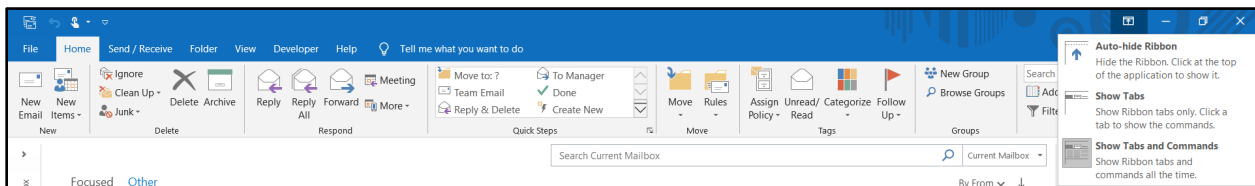
*Figure 3: The options that **Ribbon Display Options** offers*

Ribbon Display Options offers three options:

- **Auto-hide Ribbon**. This option hides the ribbon. To display the ribbon, you must then select the top pane in the app.
- **Show Tabs**. This option displays only the tab names. When you select a tab, the commands on that tab become available.
- **Show Tabs and Commands**. This option displays the tabs and their command names.

Understand tabs

The most commonly used commands in the app reside on the **Home** tab. Other tabs have commands for distinct functions of the app. For example, if you need to insert a picture or attach a file to an email message, you'll select the **Insert** tab, which the following screenshot depicts.
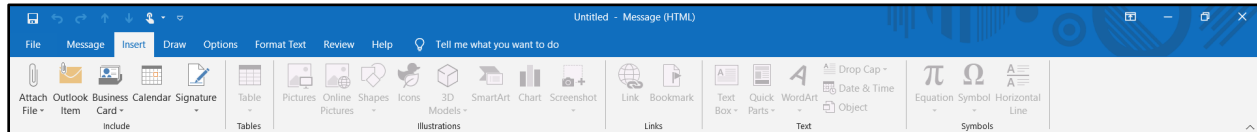
*Figure 4: The **Insert** tab*

The **Insert** tab supplies various commands for including information or inserting attachments into your Outlook items.

Understand contextual tabs

Occasionally, you might notice more tabs appear when you're working with certain objects, such as pictures or tables. These are special tabs that appear only when needed to supply commands relevant to that type of object. For example, the following screenshot depicts the **Format** contextual tab.
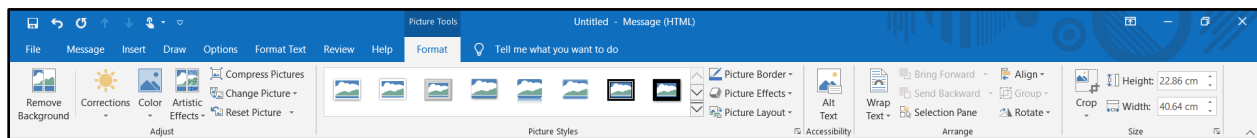
*Figure 5: The **Format** contextual tab*

Understand tab groups

Outlook divides each tab into more manageable sections known as groups. Each *group* has options that are related to specific tasks, thereby helping you to find certain commands. For example, the following screenshot depicts the groups on the **Insert** tab.
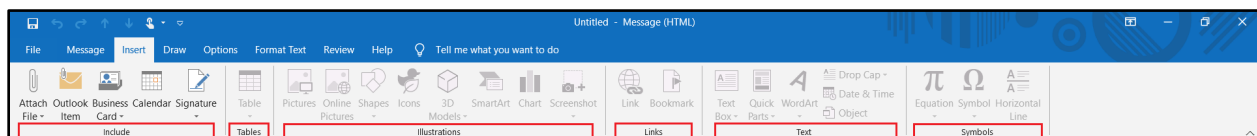
*Figure 6: The groups on the **Insert** tab*

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Customize the ribbon

You can customize the ribbon to display and arrange the tabs according to your preferences. You can hide, remove, or rearrange tabs to make certain commands easier to find. You can even create your own specialized tabs.
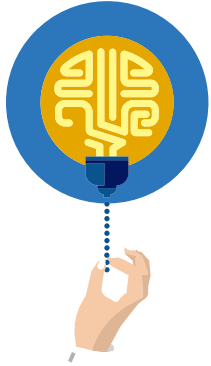
Did you know?

Unlike other Office apps, Outlook displays different tabs and commands depending on where you're working in Outlook. For example, the **Appointment/Meeting** window displays a **Scheduling** tab, whereas the **Contact** window displays a **Contact** tab.

Additional information

For more information, refer to: Customize the ribbon in Office

Activity: Discuss and learn

The teacher will demonstrate how to customize the ribbon. Be prepared to discuss the advantages and disadvantages of making customizations.

Resources required

You'll need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Observe as your teacher demonstrates customizing the ribbon.

2. Participate in the discussion with your teacher and classmates.
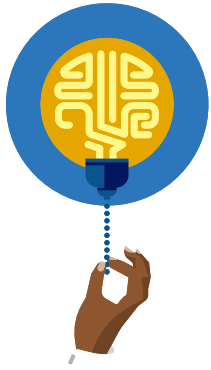
Did you know?

If you select the Alt key, Outlook assigns a keyboard shortcut to each tab, as the following screenshot depicts. When you then choose a tab by selecting its keyboard shortcut, Outlook assigns a keyboard shortcut to each command on that tab, as depicted in the following screenshot.
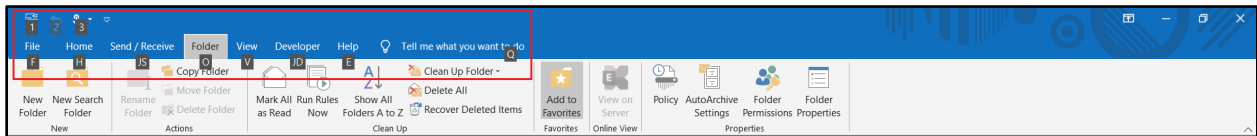
Figure 7: The ribbon with keyboard shortcuts

Try-it: Customize the ribbon

Now that you're familiar with the ribbon, it's time to discover whether you can find some common commands in Outlook and make some customizations to the ribbon. In this leveled try-it activity, you'll explore the tabs and identify the groups and options on the ribbon. You'll also change the default ribbon and save your customizations. Making these changes should help you get right to work on your first day at Munson's!

Try-it 1

In this try-it, you'll explore the ribbon and identify the common groups and commands on each tab.

Resources

You'll need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Team up with a couple of your classmates according to your teacher's directions.

2. Explore the tabs for the following items:

   o **Send/Receive All Folders**
   o **New Email**
   o **Unread/Read**
   o **Folder Pane**

3. Identify the tabs found in the interface.

4. Identify the groups and commands on the different tabs.

Try-it 2

In this try-it, you'll customize the Outlook interface by changing the default ribbon. You'll then save your customizations.

Resources

You'll need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Open the **Outlook Options** dialog box.

2. Reorder the tabs so the first three tabs are **Send/Receive**, **Folder**, and **View** in that order.

Try-it 3

In this try-it, you'll hide and display tabs. You'll also customize the Outlook interface by changing the default ribbon. You'll then save your customizations.

Resources

You'll need the following resources for this try-it:

- None

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Instructions

The following are the general tasks that you need to perform during this try-it:

1. Change the ribbon display option in Outlook to **Show Tabs**.

2. Open the **Outlook Options** dialog box.

3. Display the **Developer** tab.

4. Hide the **Folder** tab.

5. Reorder the tabs so the first three tabs are **Send/Receive**, **Folder**, and **View** in that order.

6. Save your customizations.

Topic 2: Customize the Quick Access Toolbar

The **Quick Access Toolbar** resides at the top (or beginning) of the screen, as the following screenshot depicts. As its name implies, this toolbar gives you quick access to the commands you most often use. As your schedule becomes busier, you'll find the **Quick Access Toolbar** handy, because it displays your most-used options at all times, and you don't have to browse through the interface to get to those options.
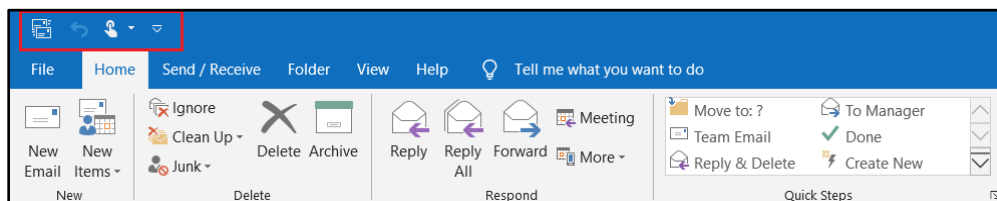
*Figure 8: The **Quick Access Toolbar***

By default, the **Quick Access Toolbar** displays a minimal number of options, which the following table describes. You can fully customize the **Quick Access Toolbar** by adding or removing options.

Icon	Function	Description
	Send/Receive All	Sends and receives all items, such as messages and calendar items
	Undo	Reverses the last action performed
	Customize Quick Access Toolbar	Displays a menu of options for the **Quick Access Toolbar**

*Table 4: The default buttons on the **Quick Access Toolbar***

As you work with any Office app, you'll find yourself consistently using certain options on the tabs. This should help you identify the options that you might like to have readily available on the **Quick Access Toolbar**.

Add and remove options

The purpose of the **Quick Access Toolbar** is to display the commands that are most important to each user. Therefore, it makes sense that you can customize this toolbar. One way to do so is to use **Customize Quick Access Toolbar**. The following screenshot depicts the items that display when you select **Customize Quick Access Toolbar**.

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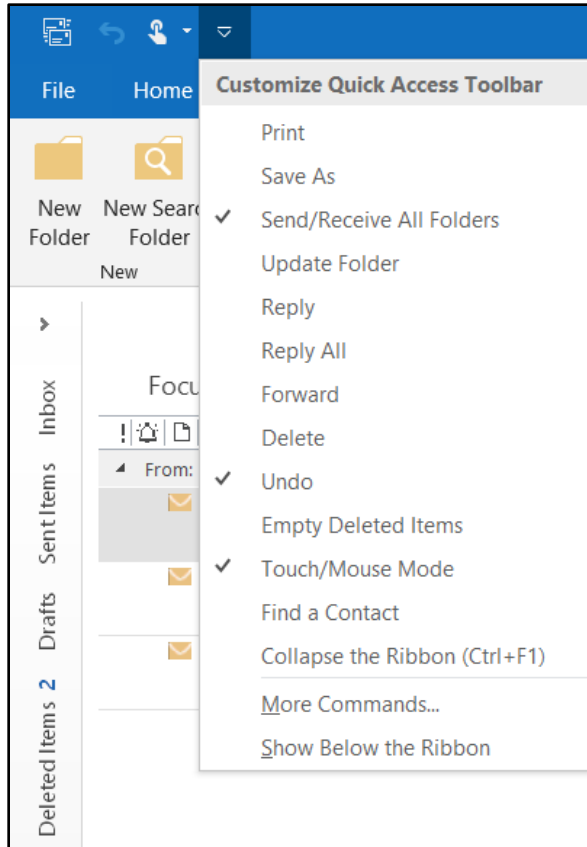
*Figure 9: The **Customize Quick Access Toolbar** menu*

By selecting and clearing the menu items, you can add commonly used commands, such as **Print**, **Reply**, and **Delete**, to the **Quick Access Toolbar**.

Another way to add a command to the **Quick Access Toolbar** is to right-click or access the context menu of any option on the ribbon and then select **Add to Quick Access Toolbar**. The following screenshot depicts this process.
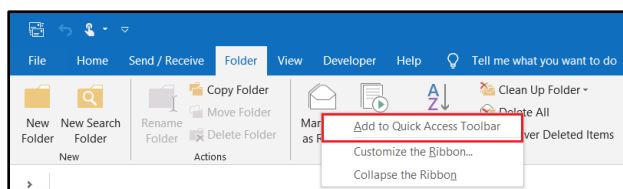
Figure 10: The context menu for a ribbon option

The new button appears at the end of the **Quick Access Toolbar**, as the following screenshot depicts.
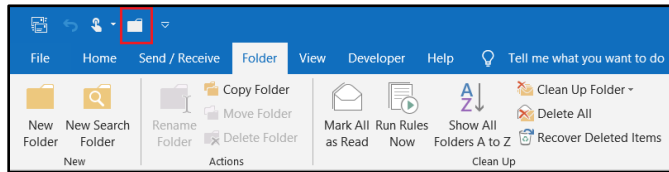
*Figure 11: A new button added to the **Quick Access Toolbar***

Customize the Quick Access Toolbar

Not all functions in Outlook appear on the ribbon. Sometimes, the most helpful options appear on menus or in obscure dialog boxes. The **Quick Access Toolbar** provides a solution if you want to make these options readily available. You can customize the **Quick Access Toolbar** by selecting **More Commands** on the **Customize Quick Access Toolbar** menu to find and add more commands, as the following screenshot depicts.
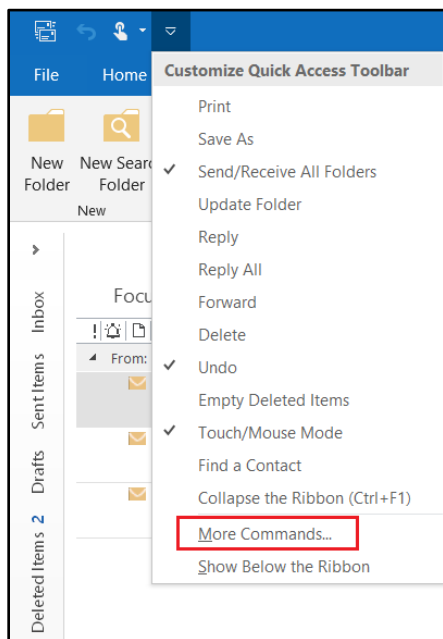
*Figure 12: The **Customize Quick Action Toolbar** menu with **More Commands** pointed out*

The **Outlook Options** dialog box appears. In the **navigation** pane on the left side, select **Quick Access Toolbar**, and then observe the options in the **Popular Commands** box. The following screenshot depicts this process.
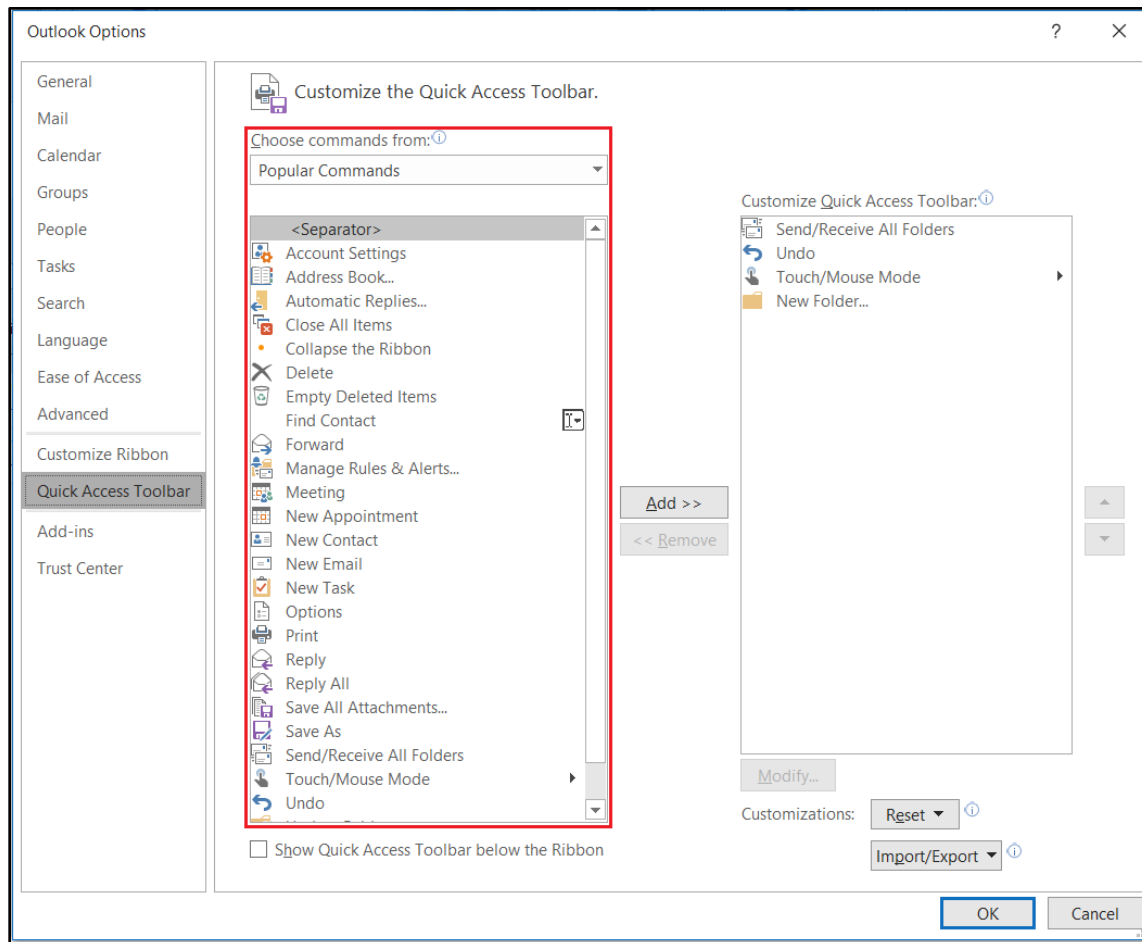
*Figure 13: **Popular Commands** in the **Outlook Options** dialog box*

To include an option on the **Quick Access Toolbar**, add it from the **Popular Commands** box to the **Customize Quick Action Toolbar** box. To do so, select an option, and then select **Add**, as the following screenshot depicts. Similarly, you can remove an option from the **Quick Access Toolbar** by selecting it in the **Customize Quick Action Toolbar** box and then selecting **Remove**.

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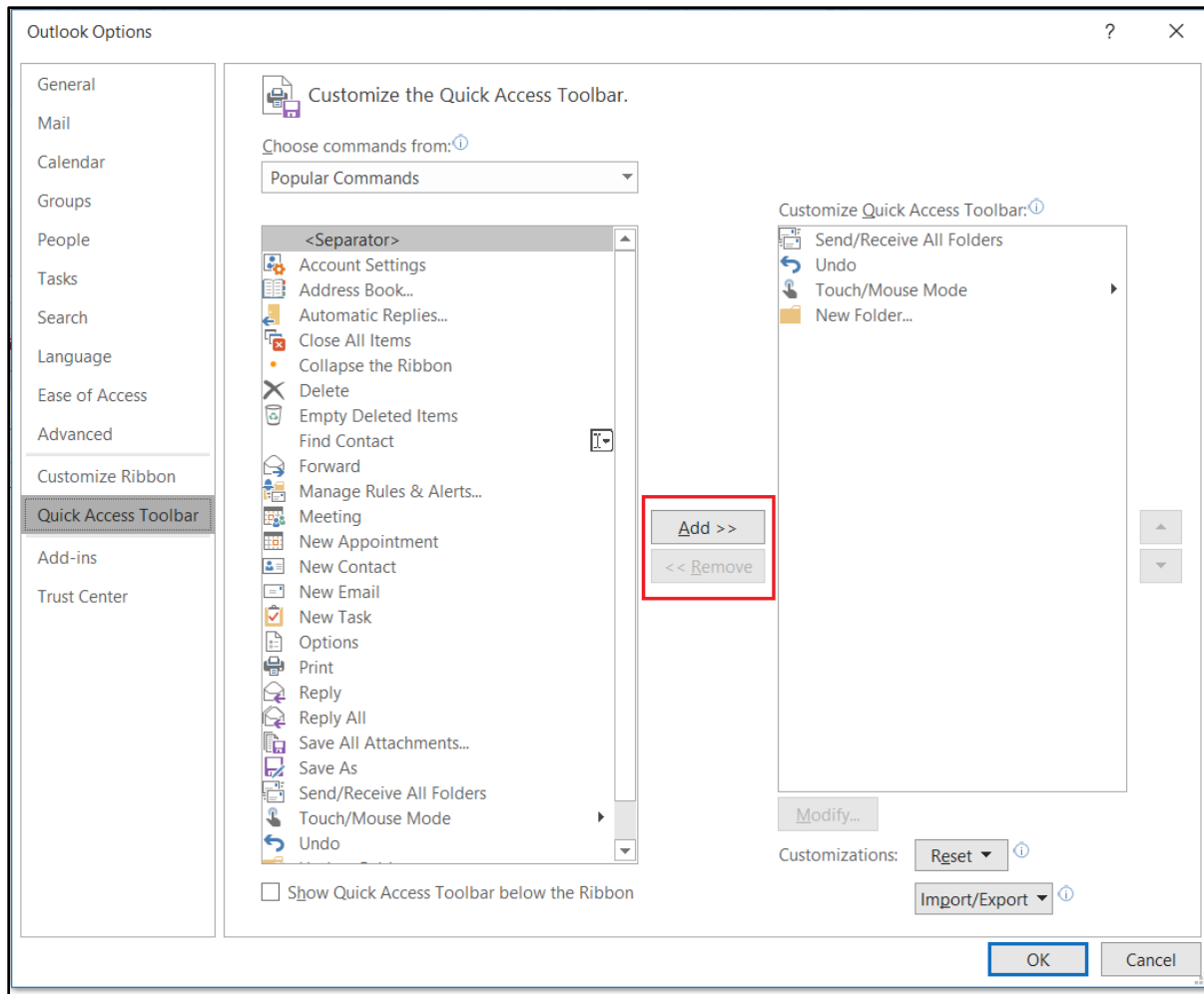
*Figure 14: The **Add** and **Remove** buttons*

You can also change the order of the options on the **Quick Action Toolbar**. In the **Customize Quick Action Toolbar** box, select an option, and then use **Move Up** and **Move Down** (which display the arrow icons) to move that option up or down. Select **OK** to save your customizations. The following screenshot depicts this process.

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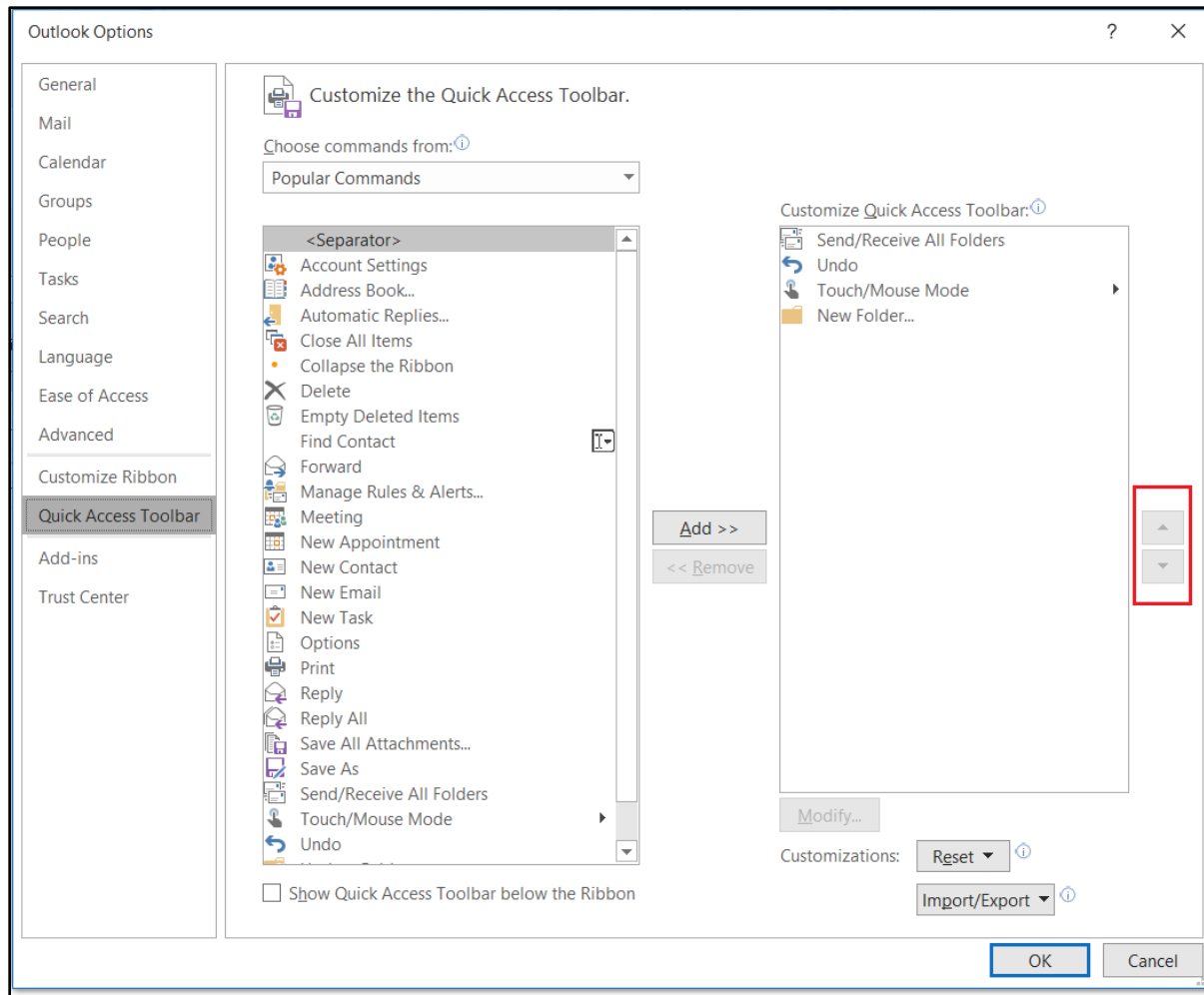
Figure 15: The reordering buttons
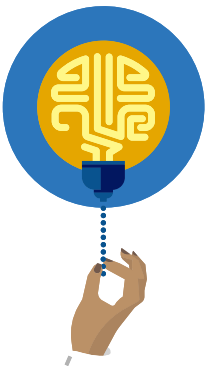
Did you know?

In the modern Office UI, the **Quick Access Toolbar** fades into the title bar. Did you know that you can move it below the ribbon? This makes the **Quick Access Toolbar** closer, more visible, and of a full-screen width, with the icons appearing in color. You can find **Show Below the Ribbon** on the **Customize Quick Access Toolbar** menu.

Additional information

For more information, refer to: Add commands to the Quick Access Toolbar

Activity: Think-pair-share

In this activity, your teacher will demonstrate how to access and customize the **Quick Access Toolbar**. You'll pair up with a classmate to explore, find, and share diverse ways to customize the **Quick Access Toolbar**.

Resources required

You'll need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Open Outlook.

2. Follow along with the teacher.

3. Collaborate with a partner to explore the ribbon.

4. Identify the options you use most often that you'd find helpful to add to the **Quick Access Toolbar**.

5. List from three through five of these options in the following spaces:

    ○ _____

    ○ _____

    ○ _____

    ○ _____

    ○ _____

6. In the discussion with your class, ask and answer questions about the options for the **Quick Access Toolbar**.

Try-it: Customize the Quick Access Toolbar

Now that you've explored the tabs, it's time to make the **Quick Access Toolbar** your own so you can be more productive. In this leveled try-it activity, you'll customize the **Quick Access Toolbar** by using the **Customize Quick Access Toolbar** menu, the context menu for assorted options, and **More Commands**.

Microsoft

Try-it 1

In this try-it, you'll add common options to the **Quick Access Toolbar** by using the **Customize Quick Access Toolbar** menu.

Resources

You'll need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Go to the **Customize Quick Access Toolbar** menu.

2. Add the following commands to the **Quick Access Toolbar**:

    o **Print**
    o **Reply**

Try-it 2

In this try-it, you'll add common options to the **Quick Access Toolbar** by using the **Customize Quick Access Toolbar** menu and the context menu.

Resources

You'll need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Go to the **Customize Quick Access Toolbar** menu.

2. Add the **Forward** command to the **Quick Access Toolbar**.

3. Use the context menu to add **Delete** and **Read Aloud** to the **Quick Access Toolbar**.

Try-it 3

In this try-it, you'll add commands to the **Quick Access Toolbar** by using **More Commands**. You'll also remove some commands and rearrange the commands on the **Quick Access Toolbar**.

Resources

You'll need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Go to the **Customize Quick Access Toolbar** menu.

2. Select **More Commands**.

3. Add **Reply All** and **Save As** from the **Popular Commands** box to the **Quick Access Toolbar**.

4. Remove **Reply All** from the **Quick Access Toolbar**.

5. Use the context menu to add **New Email** and **New Contact** to the **Quick Access Toolbar**.

6. Save your customizations.
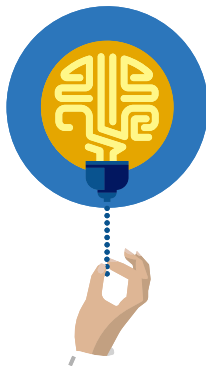
Did you know?

To ensure that your customizations are complete, it's always a good idea to close and reopen Outlook. If you don't restart Outlook, you'll lose your customizations if the app becomes unresponsive and you need to restart it.

Wrap-up

Use these questions to check what you learned in this lesson:

1. Which of the following are common options that you can add to the **Quick Access Toolbar** by using the **Customize Quick Access Toolbar** menu?

   Select all that apply.

   a. **Delete**

   b. **Reply**

   c. **Address Book**

   d. **Print**

2. In which of the following ways can you customize the ribbon?

   Select all that apply.

   a. Add commands to a default group

   b. Create a custom tab

   c. Hide a default tab

   d. Remove a group of commands from a default tab

3. What are some of the changes you can make to the tabs on the ribbon, and why might you want to do so?

   _____

   Fill in the blank space.

4. Match each of the following groups on the **Insert** tab to the option—**Pictures**, **Hyperlink**, **Calendar**, or **Attach File**—it contains.

   o **Include**
   o **Tables**
   o **Illustrations**
   o **Links**

   Categorize the following options by adding the appropriate group name next to each item.

   a. **Pictures** - _____

   b. **Hyperlink** - _____

   c. **Calendar** - _____

   d. **Attach File** - _____

Microsoft

Lesson 3: Customizing views

Overview

Outlook offers several options for customizing your view, or display, of the interface, so you can change the display according to your work requirements. You can change which items appear or stay hidden, the size of certain items, and the arrangement of items so your interface is clean and focuses on the tasks at hand. At the end of this lesson, you'll be able to use multiple options for observing your mail, calendar items, tasks, and contacts.

Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Who can customize the **Mail** workspace in Outlook?

    Select the correct option.

    a. My teacher

    b. The IT department

    c. Anyone

    d. None of the preceding answers

2. Which areas of Outlook can you observe by using peeks?

    Select all that apply.

    a. Email messages

    b. **Calendar**

    c. **To-Do List**

    d. **Contacts**

3. Outlook supplies several ways for you to observe your contacts. How might that be helpful when you're completing different tasks?

    _____

    Fill in the blank space.

4. Which of the following panes can you display in any workspace in Outlook?

    Select all that apply.

    a. **Reading Pane**

    b. **Folder Pane**

    c. **Daily Task List**

    d. **People Pane**

Topic 1: Customize the Mail view

The default view when you open Outlook is the **Mail**, or **Inbox** view. Lesson 2 described the different areas of the workspace known as panes, including:

- **Folder Pane**
- **Mail Pane**
- **Reading Pane**
- **To-Do Bar**

That's a lot going on! Although these panes are helpful and informative, sometimes it makes sense to simplify your workspace by hiding, displaying, and minimizing the panes in your view. The workspace layout is flexible, and you can improve your efficiency by changing it according to your requirements. This capability might be convenient when you're working on a smaller screen, for example, and want to hide certain UI elements to make the interface less crowded and jumbled.

The following table lists the options for controlling the different panes in the workspace.

Pane	Views	Options
Folder Pane	- **Normal** - **Minimized** - **Off**	- Favorites - Hide/Show specific folder types
Message Preview	- **1 Line** - **2 Lines** - **3 Lines**	- None
Reading Pane	- **Right** - **Bottom** - **Off**	- When to mark items as read - Full-screen reading - Preview mode

Microsoft

Pane	Views	Options
To-Do Bar	**Calendar** **People** **Tasks** **Off**	None

Table 5: The Outlook interface panes

In this lesson, you'll explore how to change the views to be more useful. Outlook offers various techniques for controlling the panes; however, the **View** tab in the **Mail** workspace offers the most robust options.

Use the View tab

The groups on the **View** tab, as the following screenshot depicts, have workspace customization options.
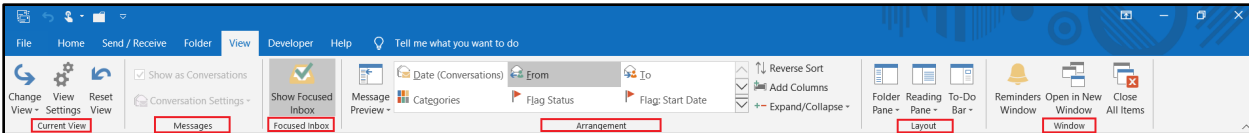
*Figure 16: The groups on the **View** tab*

When you select some options, Outlook just switches between turning it on and turning it off. For most options, selecting it displays a menu, as the following screenshot depicts.
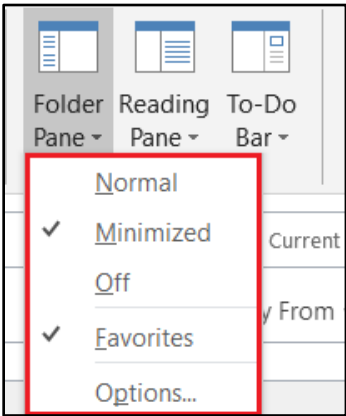
*Figure 17: The expanded **Folder Pane** menu*

The expanded menu displays the commands that you can select. It might also have an **Options** command that supplies even more ways to customize the interface.
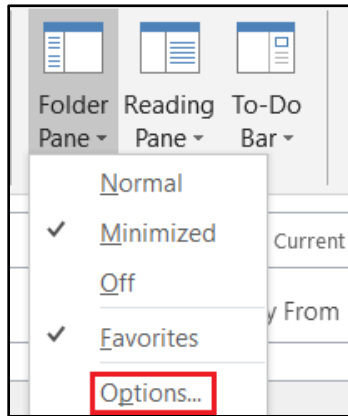
*Figure 18: The **Options** command*

Customize the workspace from the View tab

Use the following steps to customize your **Mail** workspace layout:

1. Browse to the **Mail** workspace in Outlook.

2. Select the **View** tab.

3. Select the command to customize the pane to expand the **Options** menu.

4. Select options according to your preferences.

Customize panes by using the panel arrows

In addition to using the **View** menu, you can minimize and display different panels by using the arrows in each pane, which the following screenshot depicts.

Microsoft
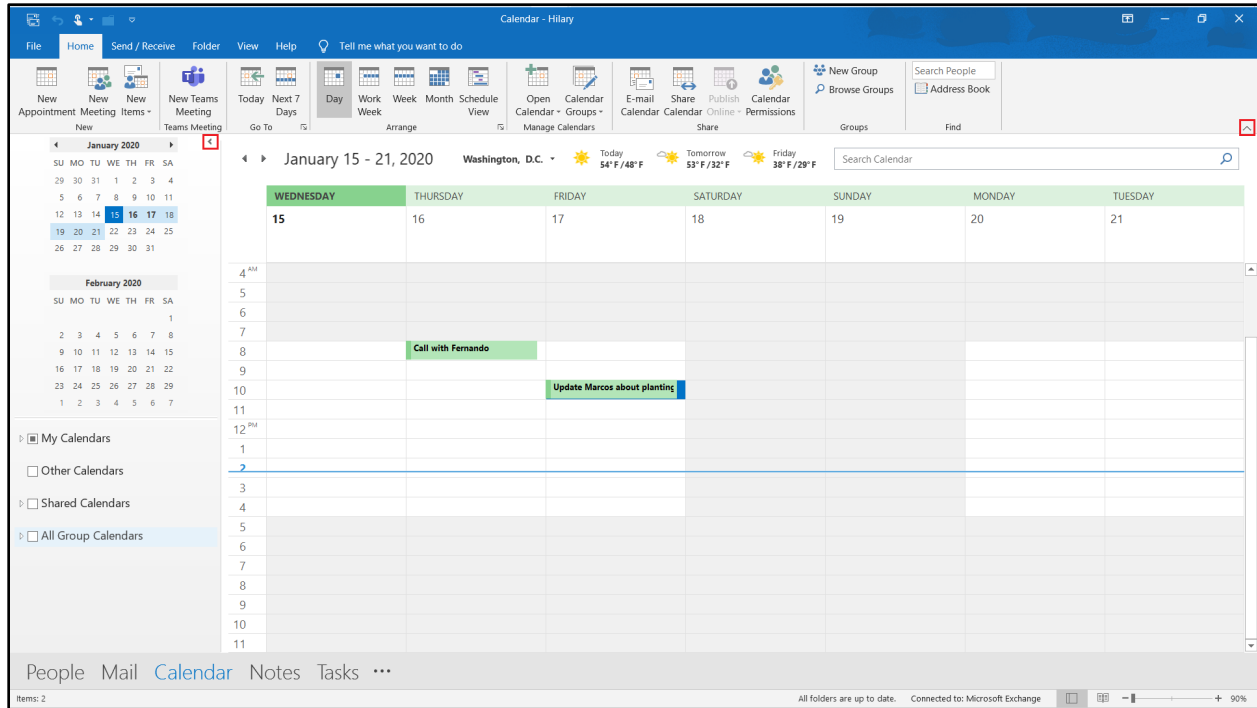
Figure 19: Arrows for minimizing and expanding panes

The arrows change depending on the state of the pane. To expand a panel, select the **Expand** arrow, as the following screenshot depicts.
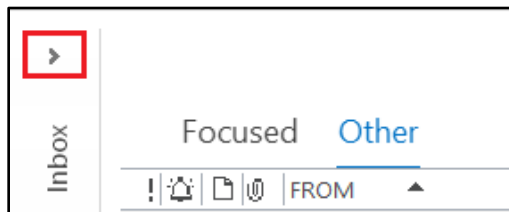
Figure 20: The expand panel arrow

To open the pane and lock it in place, select the arrow, and then select the **Pin**, as the following screenshot depicts.
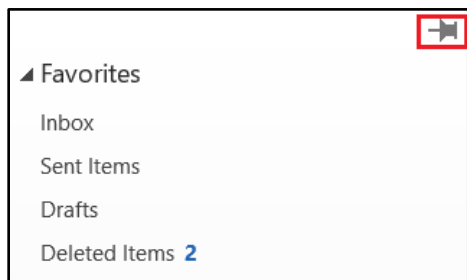
Figure 21: The pin panel icon

If the panel is expanded, you can minimize it again by selecting the minimize panel arrow, as the following screenshot depicts.
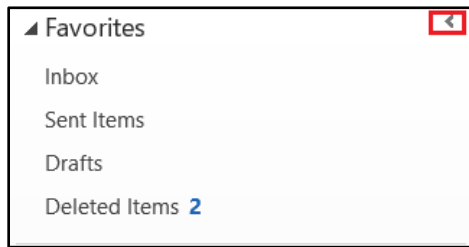
Figure 22: The minimize panel arrow

You can also select the border of any pane and then drag it to resize it to your liking, as the following screenshot depicts.
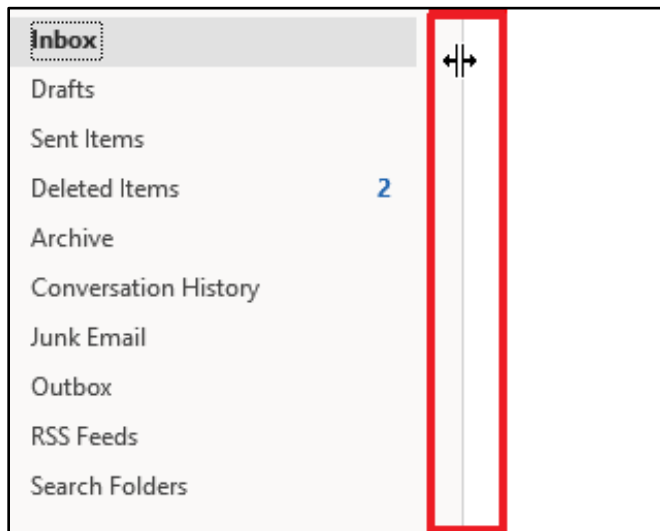
Figure 23: The border you can drag to resize a pane

Before you get too settled into using the default layout of the **Mail** workspace, take some time to explore the available options, and then set up your workspace in the way that's most useful to you.

Additional information

For more information, refer to:

- Change the appearance of the Navigation Pane
- Use and configure the Reading Pane to preview messages
- Use and customize the To-Do bar

Microsoft

Activity: Show me how

In this activity, your teacher will demonstrate different techniques for hiding and displaying different panes in the interface, including the **Folder Pane**, **Preview Pane**, and **To-Do Bar**.

Resources required

You'll need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Follow along with the teacher.

2. Ask questions about the customization options.

3. Answer questions from the teacher.

Try-it: Customize the Mail view

In this leveled try-it activity, you'll customize the **Mail** view to make it your own. You'll explore the options, turn the options on and off, and find out what works best for you.

Try-it 1

In this try-it, you'll observe the current configuration of the workspace. You'll then hide and display different panes by using the options on the **View** tab.

Resources

You'll need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Use the options on the **View** tab to customize the **Reading Pane**.

2. Use the options on the **View** tab to display the calendar in the **To-Do Bar**.

Microsoft

Try-it 2

In this try-it, you'll hide and display panes by using the collapse and expand arrows.

Resources

You'll need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Use the **View** tab to minimize the **Folder Pane**.

2. Display the **Folder Pane**, and then pin it so it is always available.

3. Resize the **Folder Pane**.

Try-it 3

In this try-it, you'll customize the **To-Do Bar**. You'll use the options on **View** tab and in the **To-Do Bar** to customize the workspace.

Resources

You'll need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Use the options on the **View** tab to add the following sections to the **To-Do Bar**:

   o **Calendar**
   o **People**
   o **Tasks**

2. Select **Close** to remove the **People** section.

3. Use dragging to size the **Calendar** pane so it displays your upcoming appointments.
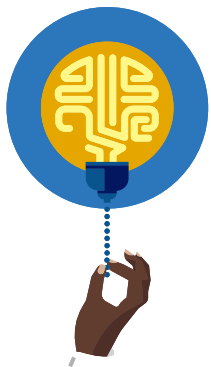
Did you know?

Hover over the buttons in the **Navigation Bar** to "peek" at your upcoming appointments, tasks, or frequent contacts.

The following screenshot depicts the **Calendar** peek that appears when you hover over **Calendar**.
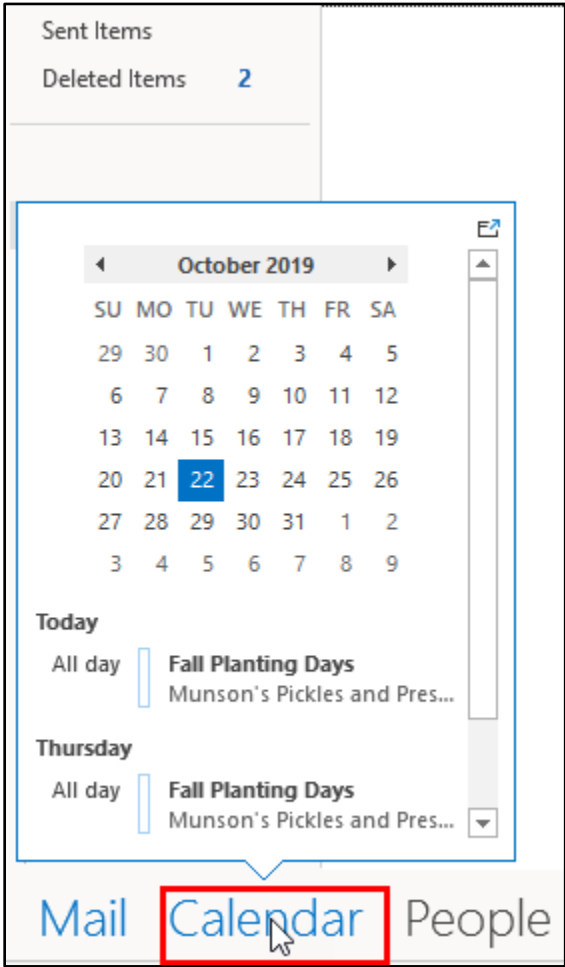
Figure 24: The Calendar peek

Topic 2: Customize the Calendar view

As your schedule gets busier, and you progress in working with your calendar, you might notice that the default views become a little busy. Luckily, Outlook offers several ways of observing the appointments and events in your calendar. This topic describes ways that you can change the **Calendar** view to maximize its use for you. The following table describes the variety of options for this purpose.

View	Description	Options
Month (default)	Observe appointments and events in a monthly display.	• Full month • Rolling five-week display
Week	Observe appointments and events in a seven-day format with details for appointment times.	• First day of the week • Time increments
Work Week	Observe appointments and events in a multiple-day format with details for appointment times. This view displays the days that the designated working times include. The default working times are Monday through Friday, from 8:00 AM through 5:00 PM.	• Days of the week • Hours of the day • Time increments
Day	Observe appointments and events in a one-day format with details for appointment times.	• Time increments
Schedule View	Note that this alternate view is most useful as a rollup view of multiple calendars.	• Automatic switching to the **Schedule** view
Time Scale	Change the time increments that the **Day**, **Week**, and **Work Week** views display.	• Increments from 5 minutes through 60 minutes

*Table 6: The **Calendar** view options*

Microsoft

Change the Calendar view

Customizations to the **Calendar** view depend on the preferences that each user sets. Others who use the **Scheduling Assistant** or those who have the Sharing permission for the calendar can review these customizations.

To change the **Calendar** view, use the options in the **Arrange** group on the **Home** tab, as the following screenshot depicts.
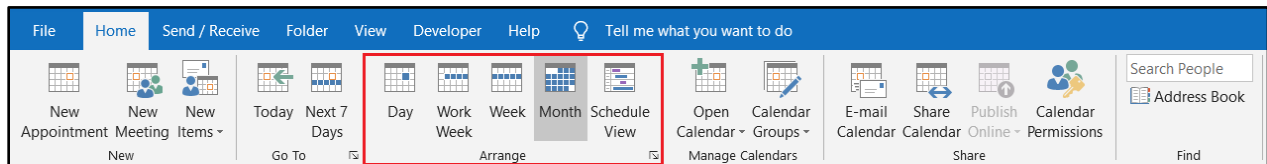
*Figure 25: The **Arrange** group on the **Home** tab*

You can switch your view at will to use the one that's most useful for the current task. Need to review your month all at once? Use the **Month** view. Need to review your availability this week? Use the **Week** or **Work Week** view.

In the **Folder** pane, you can change the current view of the calendar to a specific period. Note that selecting a date displays that date within the current view of the calendar. For example, if you've selected the **Work Week** option, the calendar will display the date you select within that work week. The following screenshot depicts the **Work Week** view with a single week pointed out.
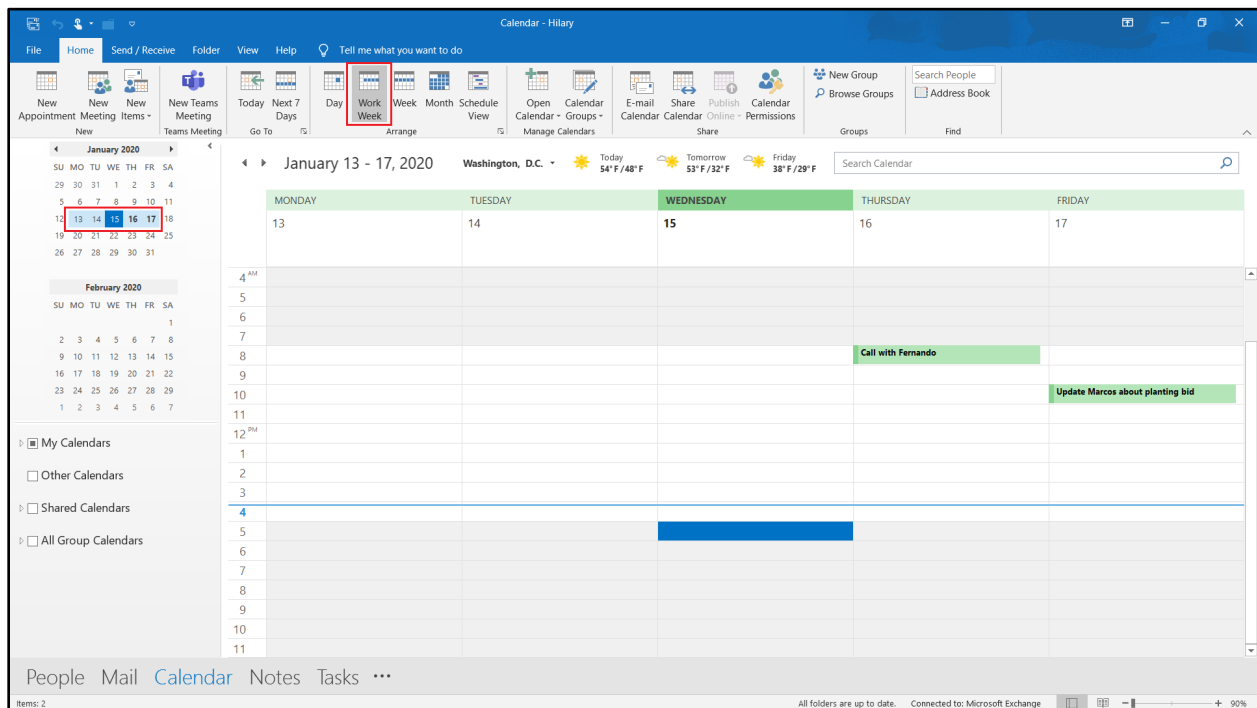
*Figure 26: The **Work Week** view of the calendar*

Microsoft

Use the arrows at the top of the pane to move forward or backward by a month. The following screenshot depicts these arrows.
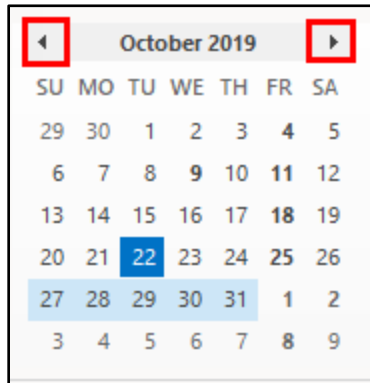
*Figure 27: The navigation arrows in the **Calendar** pane*

You can also resize the **Calendar** pane to display one or two months, depending on your preference and screen size. To do so, drag the divider till you achieve the size that's most suitable for you, as the following screenshot depicts.
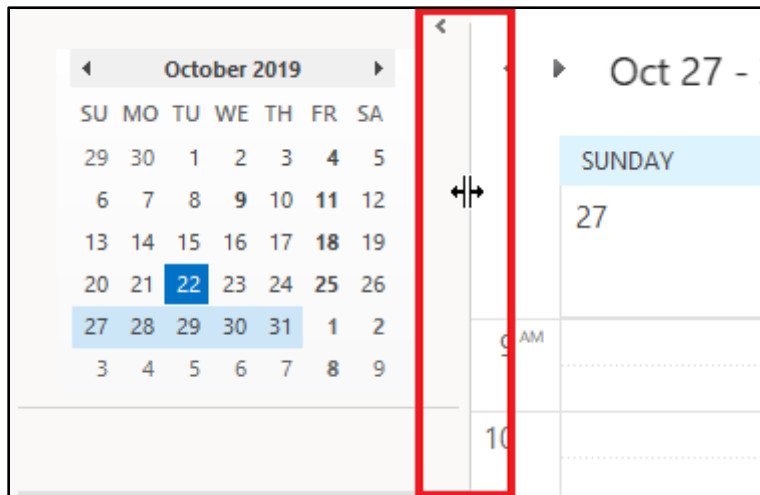
*Figure 28: The pane border in the **Calendar** pane*

Use the Go To group

In addition to the calendar navigation arrows, two helpful options exist for navigation in the **Go To** group on the **Home** tab. They are **Today** and **Next 7 Days**, as the following screenshot depicts.
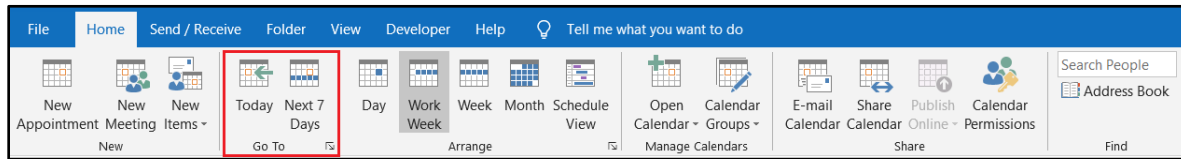
*Figure 29: The **Go To** group of the **Home** tab*

With **Today**, you can go to today's date (in the current view). With **Next 7 Days**, you can go to the next seven days beginning with today's date (in the **Week** view)—even if today is in the middle of the week. The following screenshot depicts the **Next 7 Days** option.
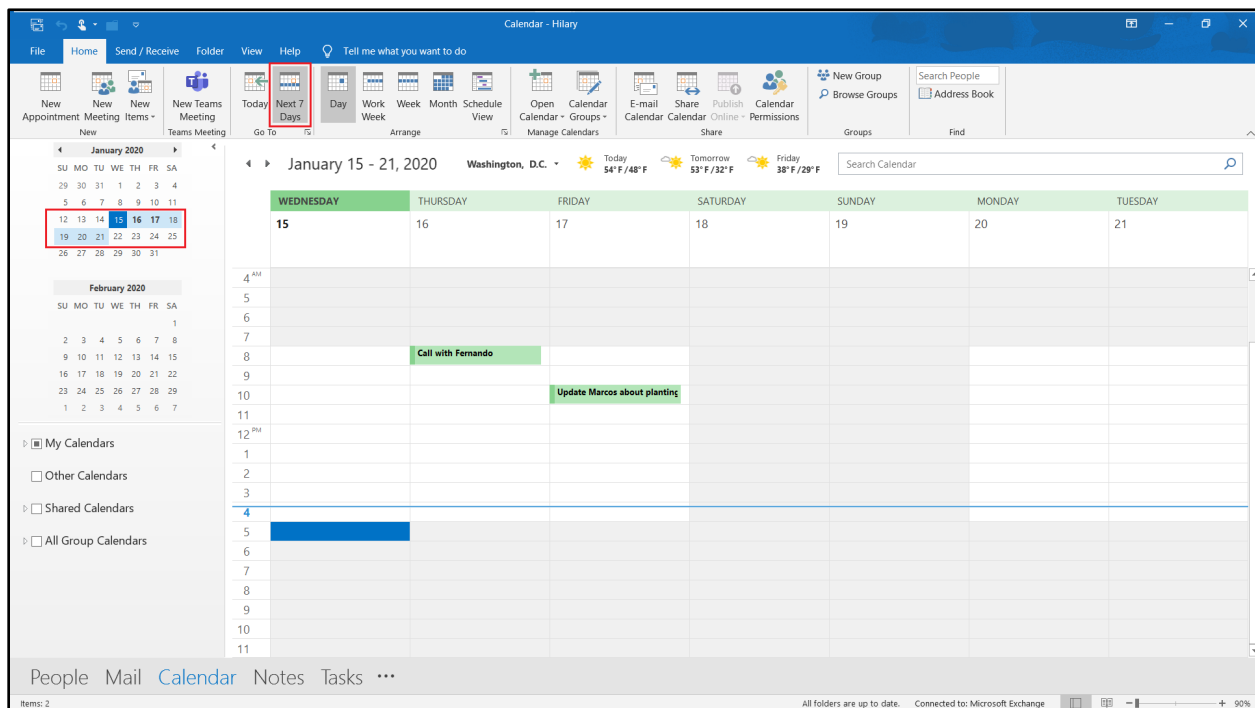
*Figure 30: The **Week** view that displays after you select **Next 7 Days***

Customize the Calendar workspace layout

Just as you can customize the **Mail** workspace, you can also customize the layout of the **Calendar** workspace according to your preferences. You can:

- Select **Minimized** on the **Folder Pane** menu to minimize and expand the **Calendar** navigator and the **Folder Pane**.
- Select **Pin the Folder Pane** to restore the pane.
- Drag the vertical border of the pane to resize the pane.
- Hide or display the **Daily Task List** pane.

You can also hide or display panes in the **Calendar** workspace just like you can in the **Mail** workspace. You can manage the panes by using the **Layout** group on the **View** tab, which the following screenshot depicts.
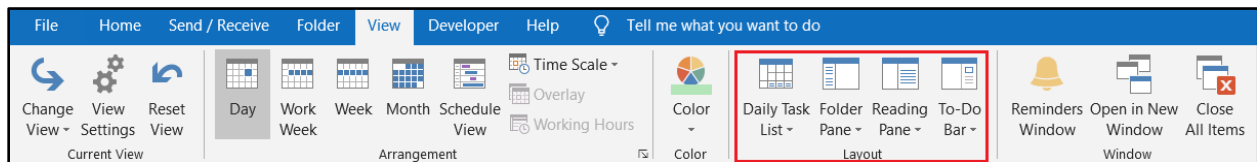
*Figure 31: The **Layout** group on the **View** tab*

Use the Daily Task List layout

In addition to having the standard workspace panes, the **Calendar** view has an option called **Daily Task List**. To observe the tasks due on their due dates in your **Calendar** view, you can display this optional pane in the **Calendar** window. This option resides in the **Layout** group on the **View** tab, as the following screenshot depicts.
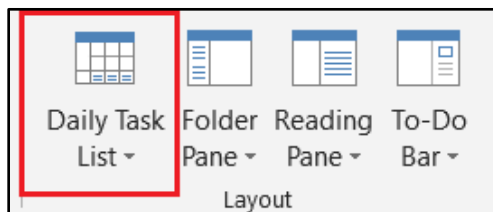
*Figure 32: The **Daily Task List** option*

To display the available commands for **Daily Task List**, select the arrow next to **Daily Task List**. The following screenshot depicts these menu commands.

Microsoft
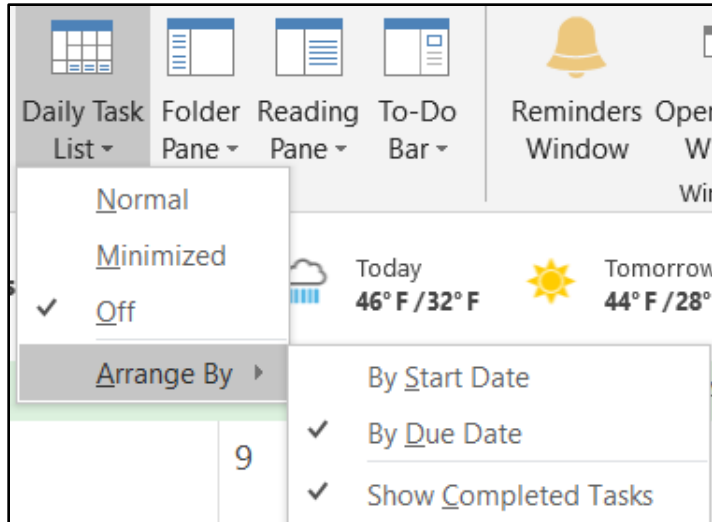
*Figure 33: The **Daily Task List** menu*

On the **Daily Task List** menu, you can set your preferences for the pane (**Normal**, **Minimized**, or **Off**). You can also set what to arrange the tasks by (**Start Date** or **Due Date**) and whether you want the completed tasks to display.

Find appointments and meetings

When you first start, your calendar might seem pretty bare, but your schedule might eventually abound with meetings and appointments. Forgot when you scheduled a meeting? No problem! You can use the **Search Calendar** option to find any appointment or meeting in your calendar.

To find an event, select the **Search Calendar** box in the **Calendar** workspace, which the following screenshot depicts.
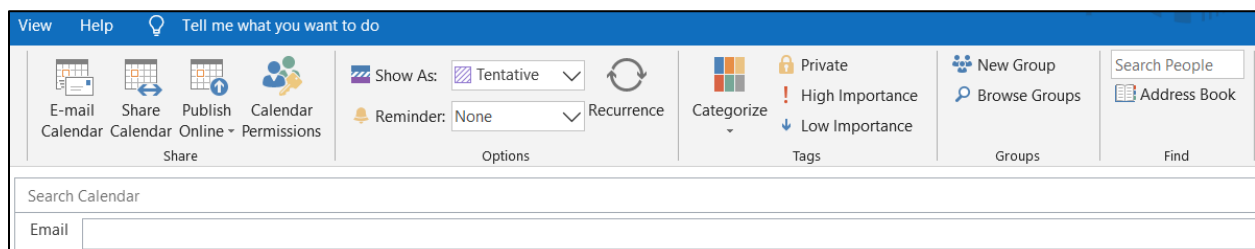
*Figure 34: The **Search Calendar** box in the **Calendar** workspace*

Microsoft

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When you enter text in the **Search Calendar** box, the **Search** contextual tab displays. The following screenshot depicts this tab.
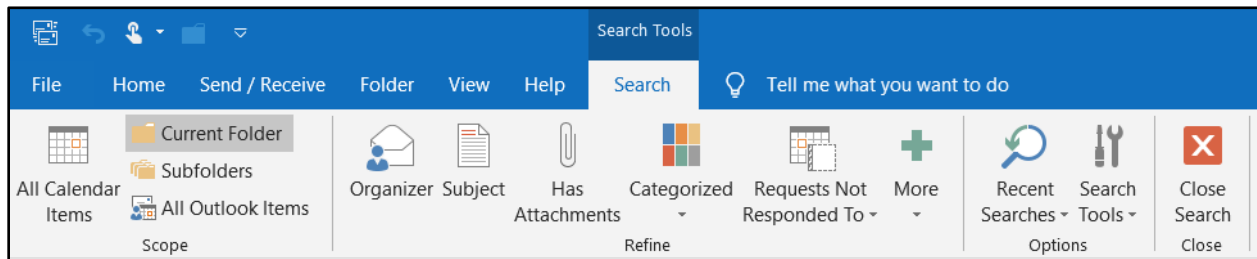
*Figure 35: The **Search** contextual tab*

Search for an event by using any of the information it might contain, such as its name, location, organizer, or event attendees. If needed, you can use the options in the **Refine** group on the **Search** contextual tab to narrow down the results. The following screenshot depicts the **Refine** group on the **Search** contextual tab.
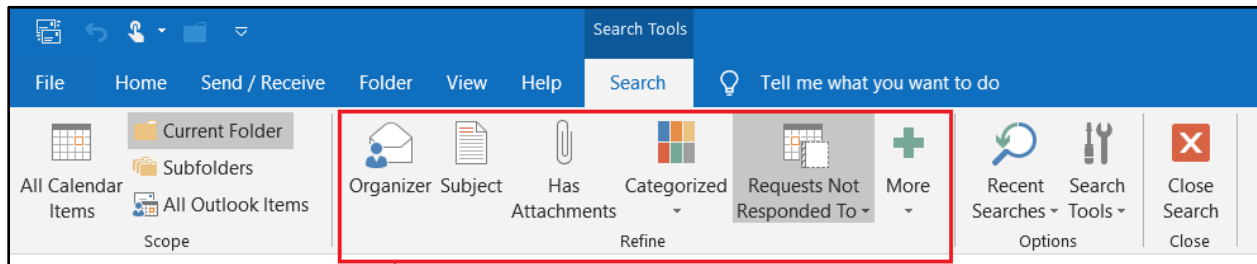
*Figure 36: The **Refine** group on the **Search** contextual tab*

You can explore even more options by expanding the **More** menu. As you continue to work with the calendar in Outlook, you'll encounter situations for which one view is more helpful than the others. Be sure to explore the views and configure your **Calendar** workspace in a way that's the most useful for you.

Additional information

For more information about customizing the **Calendar** workspace in Outlook, refer to: Change how you view your Outlook calendar

Activity: Discuss and learn

Discuss with the teacher and your classmates when different views of the calendar might prove beneficial and help with productivity.

Resources required

You'll need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Follow along with the teacher to change the views of the **Calendar** workspace.

2. Discuss with your classmates how different views might prove useful.

3. Ask and answer questions about the view customization options.

Try-it: Customize the Calendar view

It's your first day at the farm, and scheduling will be a big part of your duties as an intern. By setting up your **Calendar** workspace, you can make it as easy as possible to manage your schedule. In this leveled try-it activity, you'll customize the **Calendar** view.

Try-it 1

In this try-it, you'll use the options on the **Home** tab to observe the calendar in diverse ways.

Resources

You'll need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Change the view to the **Week** view. Observe the order in which the days display.

2. Change the view to the **Work Week** view. Observe the order in which the days display.

3. Select a **Wednesday** date in the next couple of weeks in the calendar.

4. Display the next seven days. Observe the order in which the days display.

Microsoft

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Try-it 2

In this try-it, you'll use the options on the **View** tab to observe the calendar in diverse ways.

Resources

You'll need the following resources for this try-it:

• None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Change the view to the **Day** view. Observe the times available for scheduling.

2. In the **Arrangement** group, change the **Time Scale** option to **60 Minutes**, and then **10 Minutes**. Observe the appointment times available for scheduling.

Try-it 3

Use the **Layout** group on the **View** tab to customize the **Calendar** view.

Resources

You'll need the following resources for this try-it:

• None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Display the **Daily Task List** arranged by **Due Date**.

2. Display the **Reading Pane** on the right side, and then select an appointment. Observe the details that the **Reading Pane** supplies.

Topic 3: Customize the People or Contacts view

The **People** workspace in Outlook gives you a place to store information about the people you interact with on a regular basis. You can update your contact cards with vital information, such as email addresses and phone numbers, and even personal information, such as birthdays. In the **People** workspace, you can keep the lines of communication open and foster relationships with your contacts.
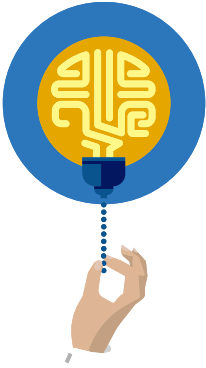
Did you know?

The **People** view was previously known as the **Contacts** view. If you select **People** in the navigation bar, your Outlook window displays **Contacts** on the title bar.

The **People** workspace has several options for helping you find a contact. The following table describes these options.

View	Description	What to use for
People (default)	This list of your contacts includes their names, pictures (when available), and presence information (also when available).	Internal contacts for quick communication options
Business Card	Each contact appears on a virtual card that displays the primary contact information. The card also includes a picture when available.	External contacts or when you need quick contact information
Card	Each contact appears on a card that displays basic information, such as their full name, job title, department, and email. The card doesn't include a picture.	Sorting and finding people by their job title or company
Phone	This simple list of contacts includes each person's company and up to four phone numbers in the default view. You can sort this information by any of the displayed columns.	Printing a version of your contacts with their phone numbers
List	This simple list of contacts includes each person's job title, company, department, and country/region. You can sort this information by any of the displayed columns.	Printing a version of your contacts with their titles and companies or locations

*Table 7: The view options in the **People** workspace*

Microsoft

Change the People view

The default view is the **People** view. To change to another view, use the **Current View** group on the **Home** tab, which the following screenshot depicts.
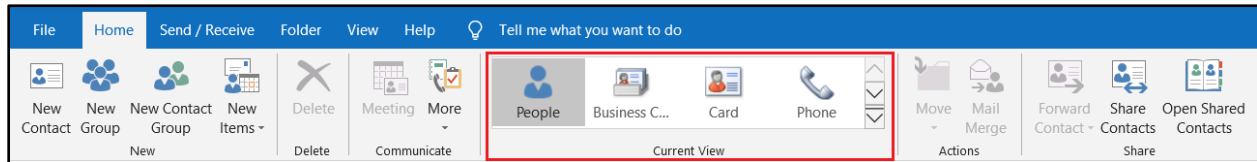
*Figure 37: The **Current View** group*

Note that depending on your screen resolution, you might need to use the scroll arrow or select **More** to select a different view. The following screenshot depicts the **Current View** gallery.
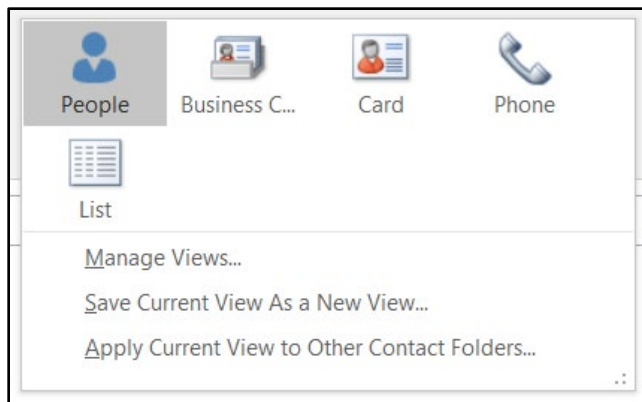
*Figure 38: The **Current View** gallery*

Use list views

If you choose one of the list views (that is, **Phone** or **List**), you can select any column heading to sort the list in ascending (A to Z) or descending (Z to A) order. An arrow appears in the column heading that you select. The arrow indicates whether the sort is ascending (up) or descending (down). The following screenshot depicts the list sorted by full name in ascending order.

*Figure 39: The **List** view sorted by full name in ascending order*

Sort list views

You can change the sort order of contact list views. To do so, perform the following steps:

1. Go to the **People** workspace.

2. On the **Home** tab, in the **Current View** group, select a list view (that is, **Phone** or **List**).

3. Select a column header to sort the values in ascending order.

4. If needed, select the column header again to reverse the order to descending.

Customize the workspace from the View tab

As with the other workspaces in Outlook, you can customize the **People** workspace. To do so, use the **Arrangement** and **Layout** groups on the **View** tab. The following screenshot depicts these groups.
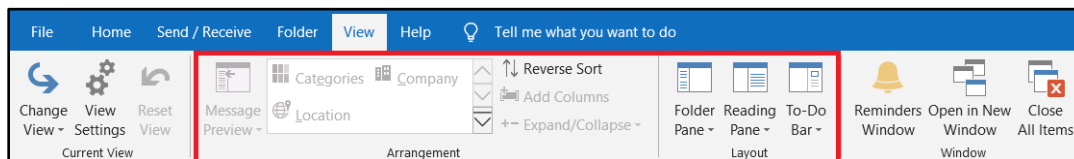
*Figure 40: The **Arrangement** and **Layout** groups on the **View** tab*

Note that some options on the **View** tab might not be available, because they aren't available for the particular view that's selected. In the following screenshot, several options aren't available.
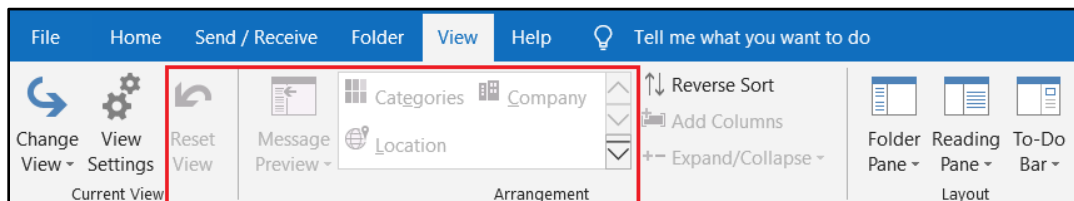
*Figure 41: Options on the **View** tab in the **People** view that aren't available*

The **Layout** group in the **People** workspace has the same panel control options that the **Mail** and **Calendar** workspaces have. These options are **Folder Pane**, **Reading Pane**, and **To-Do Bar**.

To change to a different view from the **View** tab, go to the **Current View** group, select the arrow next to **Change View** to display the **Change View** menu, and then select another view, as the following screenshot depicts.
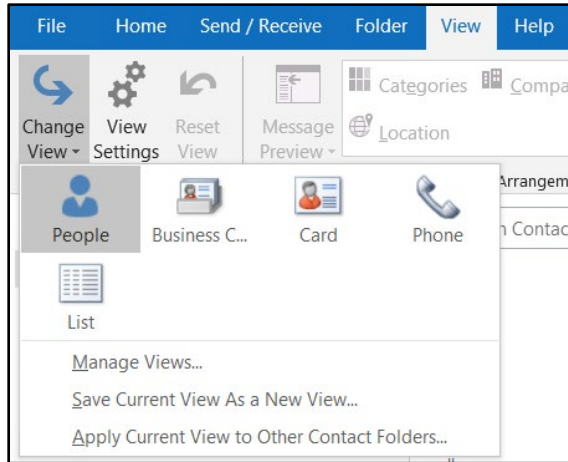
*Figure 42: The **Change View** menu*

Sort and group items

In the **People**, **Business Card**, and **Card** views, you can use **Reverse Sort** in the **Arrange** group to change the sort order of the list. **Reverse Sort** is based only on the contact name but might be helpful when you have a lengthy list of names, and the last one starts with Z.

Another helpful element of the **People** view is the alphabetical set of buttons that appears on the left side of the names. Select the letter of the alphabet for the contact you want to find to go directly to that letter in the contact list. The following screenshot depicts the alphabetical set of buttons.
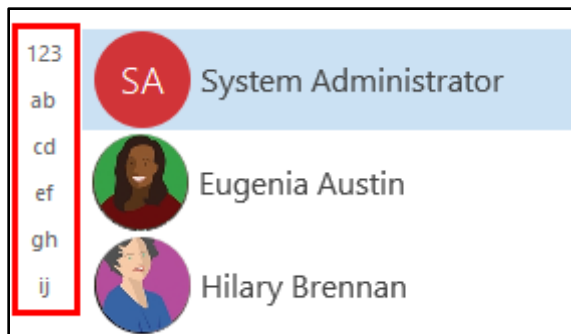
*Figure 43: The alphabetical set of buttons in the **People** view*

Understand the Arrangement group

The list views offer more options in the **Arrangement** group, including:

- **Categories**. Group your contacts by category.
- **Company**. Sort the list by company.
- **Location**. Sort the list by country/region.

To add or remove columns from a list view, go to the **Arrangement** group, and then select **Add Columns**. The following screenshot depicts this button.
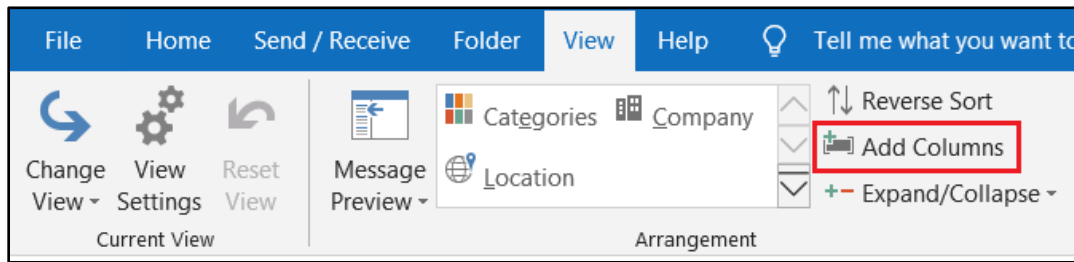
*Figure 44: **Add Columns** in the **Arrangement** group*

The **Show Columns** dialog box appears, displaying a catalog of columns grouped by category in the **Available columns** list, as the following screenshot depicts.
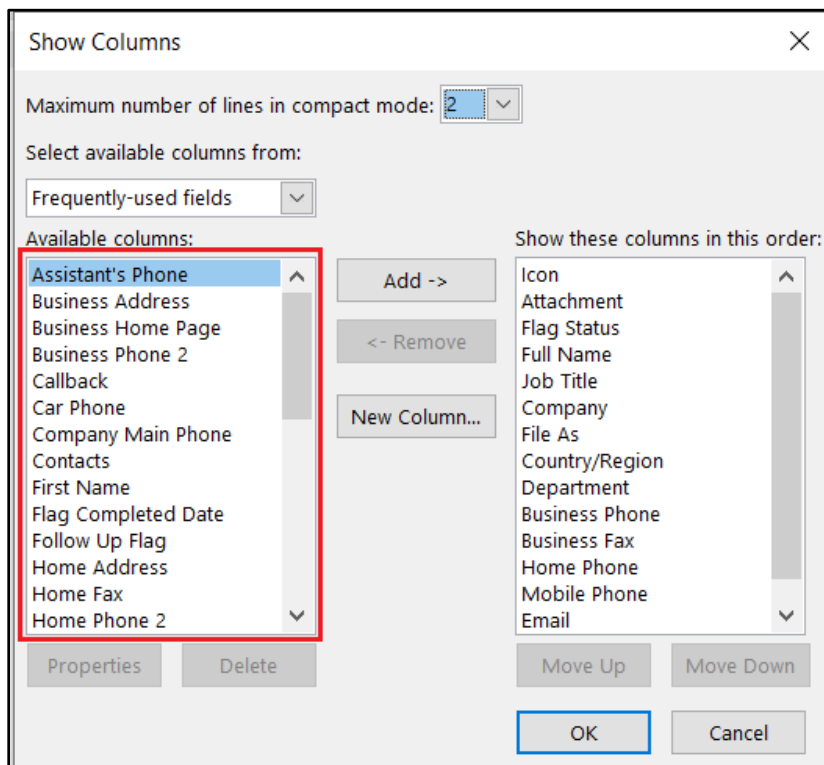
*Figure 45: The **Show Columns** dialog box*

Add columns to a list view

1. Go to the **People** workspace.

2. In the **Current View** gallery, select a list view.

3. On the **View** tab, in the **Arrangement** group, select **Add Columns**.

4. In the **Select available columns from field** box, select the category you want.

Microsoft

5. In the **Available columns** pane, select the column you want, and then select **Add**.

6. Repeat this procedure for other columns as needed.

7. If you want to remove columns, select them in the **Show these columns in this order** pane, and then select **Remove**.

8. Use **Move Up** and **Move Down** to rearrange the columns.

9. Select **OK** to save the customizations.

Find people and contacts

Even if you currently have only a few contacts, you might eventually have hundreds, and digging through your list of contacts might become time consuming. Outlook saves you time by supplying the **Search** box in the **People** workspace.

To find a contact, select the **Search Contacts** box in the **People** workspace, as the following screenshot depicts.
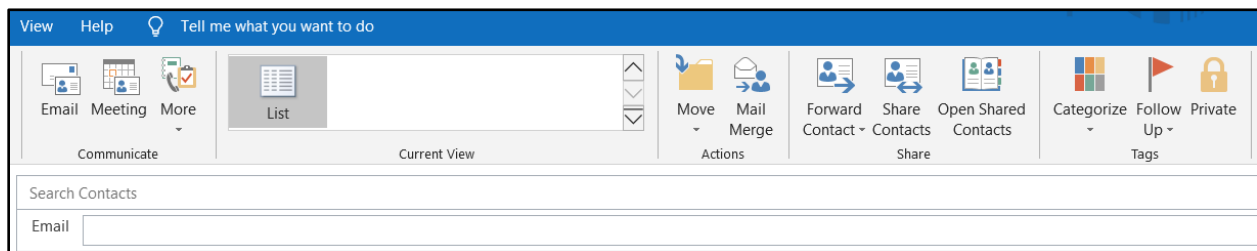
*Figure 46: The **Search** box*

The **Search** contextual tab displays, as the following screenshot depicts.
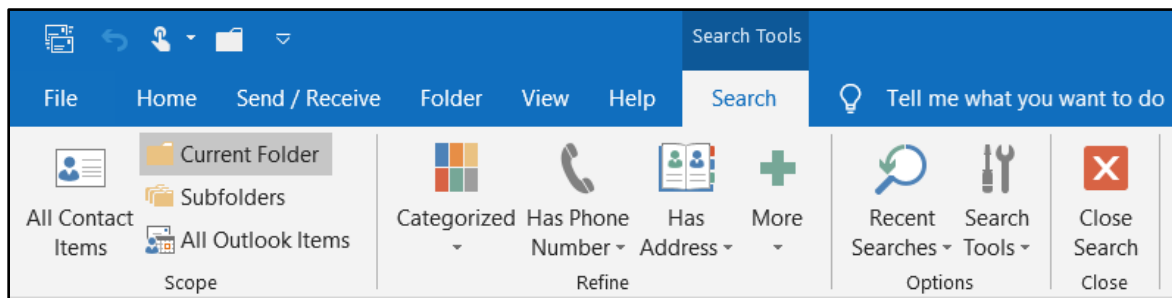
*Figure 47: The **Search** contextual tab*

Search for contacts by any information that their cards might contain, including the name, company, or location. If needed, you can narrow down the results by using the options in the **Refine** group, which the following screenshot depicts.

■■ Microsoft
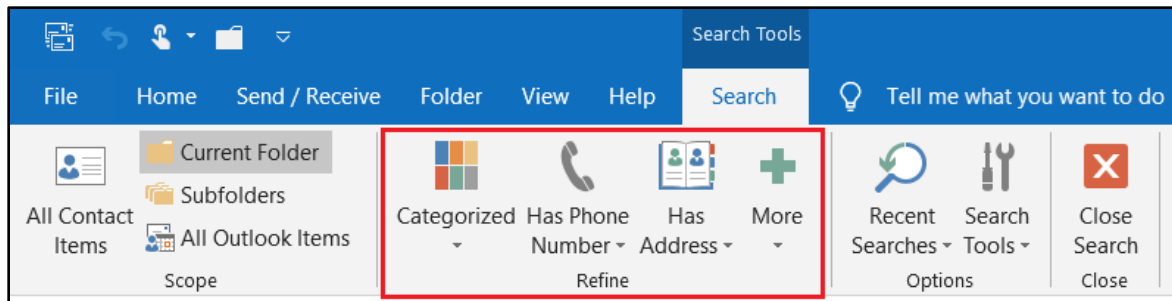
*Figure 48: The **Refine** group on the **Search** contextual tab*

You can also select **More** to become familiar with even more options. As you progress in working with the **People** workspace, you'll encounter situations for which one setup is more helpful than the others. Be sure to explore the views and configure your **People** workspace in a way that's the most useful for you.

Activity: Pose a challenge

In this activity, your teacher will supply different scenarios. Use them to think of different ways in which you can review your contact lists.

Resources required

You'll need the following resources for this activity:

* None

Activity instructions

Participate in the activity by following these instructions:

* Participate in the discussion with the teacher.
* Ask and answer any questions.

Try-it: Customize the People or Contacts view

You're just getting started with tracking your contacts in the **People** workspace in Outlook. This is all new, so you want to explore how to set up your workspace to become more efficient at finding and communicating with your peers, volunteers, and vendors at the farm. In this leveled try-it activity, you'll customize how you review your contacts list.

Try-it 1

In this try-it, you'll change the contacts view by using the **Current View** options on the **Home** tab.

Resources

You'll need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Go to the **People** workspace.

2. Change the view to the **Business Card** view.

3. Change the view to the **Phone** view.

4. Sort the **Phone** view by company.

Try-it 2

In this try-it, you'll change the view of your contacts by using the arrangement options on the **View** tab.

Resources

You'll need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Go to the **People** workspace.

2. Select the **Business Card** view.

3. On the **View** tab, reverse the sort order of the view to descending.

4. Change to the **Phone** view.

5. Arrange the contacts by category.

Try-it 3

In this try-it, you'll customize your contacts layout by using the **Layout** options on the **View** tab.

Resources

You'll need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Go to the **People** workspace.

2. Change the view to the **List** view.

3. Display the **Reading Pane** on the right side.

4. Select any contact, and then observe the changes in the **Reading Pane**.

5. Minimize the **Folder Pane**.

Wrap-up

Use these questions to check what you learned in this lesson:

1. Which of the following is not a **Reading Pane** configuration?

   Select the correct option.

   a. Top

   b. Right

   c. Bottom

   d. Off

2. Which of the following is not a component in the **Navigation Pane**?

   Select the correct option.

   a. Buttons

   b. Folder list

   c. Shortcut key list

   d. Favorite folders

3. What's the name of the pane that displays a list of active tasks?

   Select the correct option.

   a. **Task List**

   b. **Actions Pane**

   c. **To-Do Bar**

   d. None of the preceding answers

4. Name three scenarios where reviewing your contacts in a list view might be helpful.

    _____

    Fill in the blank space.

Lesson 4: Setting your account preferences

Overview

Your calendar settings and email signatures help you maximize efficiency by informing others of your general schedule, your available times, and your vacation schedules. This lesson describes how to customize your calendar working times, automatic signatures, and email reply settings.

Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Why might you want to share your working times on your calendar?

   _____

   Fill in the blank space.

2. An Outlook account can have multiple signatures.

   Select the correct option.

   a. True

   b. False

3. What options can you apply to your text when creating a new message?

   Select all that apply.

   a. Color

   b. Font style

   c. Font size

   d. Bold

Topic 1: Set your working times

📍 The calendar in Outlook helps you keep track of the appointments and events in your schedule. When you're working in an organization, it can also help peers and coworkers coordinate schedules for meetings. But, not all schedules are created equally! The default schedule in Outlook assumes that everyone works from 8:00 AM through 5:00 PM, Monday through Friday, but that isn't always the case. Your Outlook calendar helps you communicate your availability and work hours to your contacts. In your calendar views, nonworking times aren't available either for you or for any coworkers reviewing your schedule, as the following screenshot depicts.

Figure 49: Nonworking times (which appear shaded)

For accurate scheduling, it's a good idea to customize your work schedule by using the options in the **Outlook Options** dialog box, such as:

- **Start time**
- **End time**
- **Work week**
- **First day of week**
- **First week of year**

The following screenshot depicts the **Work time** section in the **Outlook Options** dialog box.

Figure 50: Work time options for the calendar

Change your working times in Outlook

To change your workdays and work times in Outlook, perform the following steps:

1. In the **Calendar** workspace, on the **File** tab, select **Options**.

2. In the **Outlook Options** dialog box, in the navigation pane on the left side, select **Calendar**.

3. In the **Work time** section, select the **Start time** and **End time** values for your standard workday.

4. Select the **Work week** check boxes for the days of the week that you work, and clear the check boxes for the days that aren't part of your work week.

5. For **First day of week**, select the day that you start working.

Microsoft

6. To change the first week of the year, select an option in the **First week of year** list.

7. Select **OK** to confirm the customizations.

It's important to note that the working times in Outlook don't accommodate schedules that change from day to day or from week to week. The settings assume that the weekly schedule is consistent.

Activity: Tell a story

In this activity, you'll review scenarios with your teacher and classmates and discuss reasons why people might have nontraditional schedules. Discuss why someone might become more productive after setting their work hours on the calendar.

Resources required

You'll need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Consider the diverse types of work schedules that people in your circle might have.

2. Participate in the discussion.

3. Ask your teacher clarifying questions.

Try-it: Set your working times

Your internship at the farm is an exciting opportunity! For now, you're available only on a part-time basis, but that might change during breaks or when your school schedule changes. In this standalone try-it activity, you'll set your working times so your coworkers will be aware of your availability at all times. You'll observe the calendar in **Work Week** view and customize your working times by using the options on the **File** tab.

Resources

You'll need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Observe the calendar in the **Work Week** view.

2. Change your working times in the calendar, including:

   o The days of the week
   o The times of day
   o The first day of the week

3. Observe the changes to the calendar in the **Work Week** view.

Topic 2: Create signatures

Signatures can save a lot of time by adding a standard block of information about you to the end of your email messages. You can also set up different signatures for different email accounts, quick replies, or distinct roles you might have at your school or future job. The following screenshot depicts a sample signature.

Figure 51: An example of a signature block

Signatures typically include a variety of information about the sender, including their company, role, and contact information. The recipient can then more easily respond or contact the sender if necessary.

Create a signature

Use the following steps to create a signature in Outlook:

1. In the **Calendar** workspace, on the **File** tab, select **Options**.

2. In the **Outlook Options** dialog box, in the navigation pane on the left side, select **Mail**.

3. Select **Signatures**.

Microsoft

4. In the **Select Signature to edit** section, select **New**.

5. Enter a name for the signature.

6. In the **Edit Signature** box, enter the content for the signature.

7. Format the text by using the options provided, including fonts, bold and italic formatting, and colors.

8. To add a logo or other image, select **Image** , find your image file, and then select **Insert**.

9. To tell Outlook to automatically add a signature to new messages, select that signature in the **New Messages** box.

10. To tell Outlook to add a specific signature to message replies or forwarded messages, select that signature in the **Replies and forwards** box.

11. Select **OK** to confirm the changes.

It's important to note that when you create a new signature, Outlook automatically assigns it as the default signature for new messages.

Assign signatures to specific messages

In some cases, you might want to insert an alternate signature into a message instead of the default signature. Several reasons exist for doing so. You might have distinct roles in your organization or standard responses to different email inquiries. Whatever the case, you can add a different signature right from the message itself by using the **Signature** option in the **Include** group on the **Message** tab, as the following screenshot depicts.
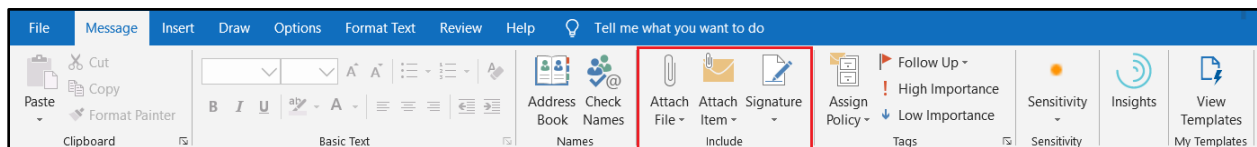
*Figure 52: The **Include** group*

Insert an alternate signature into an email message

1. Create a new email message.

2. In the email message, select the **Message** tab.

3. In the **Include** group, expand the **Signature** menu.

4. Select the signature you want.

Microsoft

Additional information

To discover more about using signatures, refer to: [Create and add a signature to messages](#)

Activity: The one-question quiz

In this activity, you'll take part in a discussion by posing one question that addresses an important concept from the day's lesson. An example is: What types of information are useful to share in a signature?

Resources required

You'll need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Consider which details might be either helpful to share with the recipients of your emails or representative of your company.

2. Be prepared to take part in the discussion with your classmates.

Activity: Show me how

The teacher will guide the class on creating, formatting, and editing signatures. Follow along, and ask questions about adding signatures to distinct types of messages.

Resources required

You'll need the following resources for this activity:

- Open **L4_T2_act_signaturesample.docx** in this lesson's Learning Activity Resources.

Activity instructions

Follow along with your classmates as your teacher helps you to:

1. Create a new signature.

2. Edit the formatting and indentation options.

3. Add the signature to all new emails.

4. Add the signature to replies and forwarded messages.

Try-it: Create signatures

Because you're getting your Outlook account set up, it's time to create a custom signature in accordance with the company standards. Your teacher has given you an example of what it should be like. In this leveled try-it activity, you'll create custom signatures to include in your messages.

Try-it 1

In this try-it, you'll create a formal signature and then choose it as the signature for all your new messages.

Resources

You'll need the following resources for this try-it:

- Open **L4_T2_try1_signaturesample.docx** in this lesson's Learning Activity Resources.
- Open **Munsons_logo_square_illustration.png** in the **Media** folder under **Student Materials**.

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Use **L4_T2_try1_signaturesample.docx** as a guideline to create the default signature for all new messages.

2. Name the signature **Formal**, and then format it as displayed in the sample.

3. Insert the logo into the signature.

4. Choose the new signature as the signature for all new messages.

Try-it 2

In this try-it, you'll create a formal signature and a second signature for replies and forwarded messages.

Resources

You'll need the following resources for this try-it:

- Open **L4_T2_try2_signaturesample.docx** in this lesson's Learning Activity Resources.
- Open **Munsons_logo_square_illustration.png** in the **Media** folder under **Student Materials**.

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Use **L4_T2_try2_signaturesample.docx** as a guideline to create a new signature for all new messages.

2. Name the signature **Formal2**, and format it as displayed in the sample.

3. Insert the logo into the signature.

4. Choose the new signature as the signature for all new messages.

5. Create a second signature by using the **Reply / Forward** sample signature in **L4_T2_try2_signaturesample.docx**.

6. Name the signature **Formal3**, and format it as displayed in the sample.

7. Confirm that the signature for new messages is **Formal2** and that the one for replies and forwarded messages is **Formal3**.

8. Save the customizations.

Topic 3: Customize your message settings

📍 Do you ever feel that all the messages you receive seem the same? They use the same font, same size, and same color, but do they have to? The truth is that you can customize all these settings in Outlook to differentiate not just the appearance of your email messages but also how they function as you manage the messages in your Inbox.

If you're involved in a long trail of emails, it might be helpful to differentiate which responses were yours and which came from other participants. Changing the font size or color might make your messages be easier to identify. The **Mail** settings in the **Outlook Options** dialog box, which the following screenshot depicts, makes customizing your message settings available.
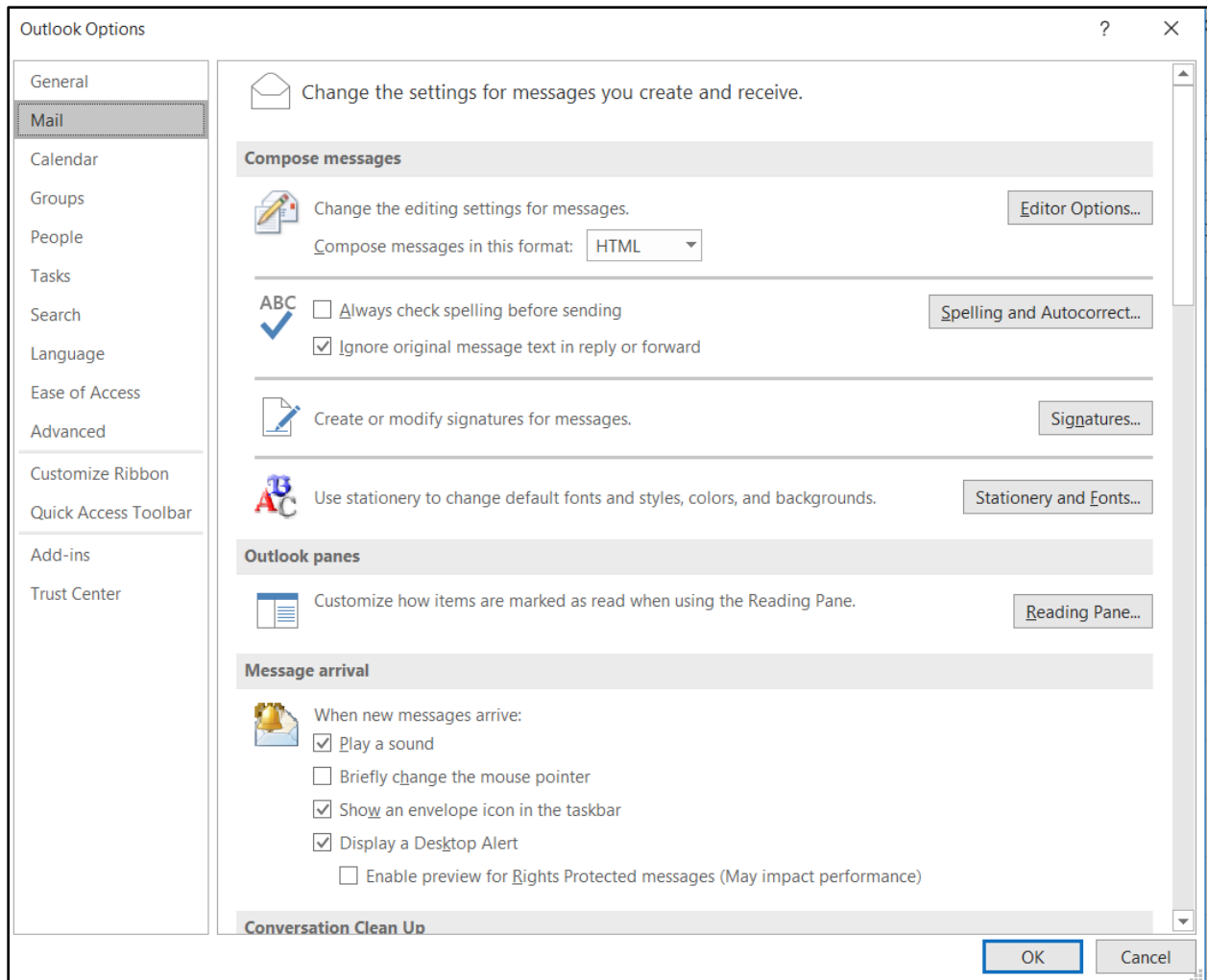
*Figure 53: The **Mail** settings in the **Outlook Options** dialog box*

To access the settings to change the default fonts, styles, and colors in your messages, select **Stationery and Fonts**, which the following screenshot depicts.
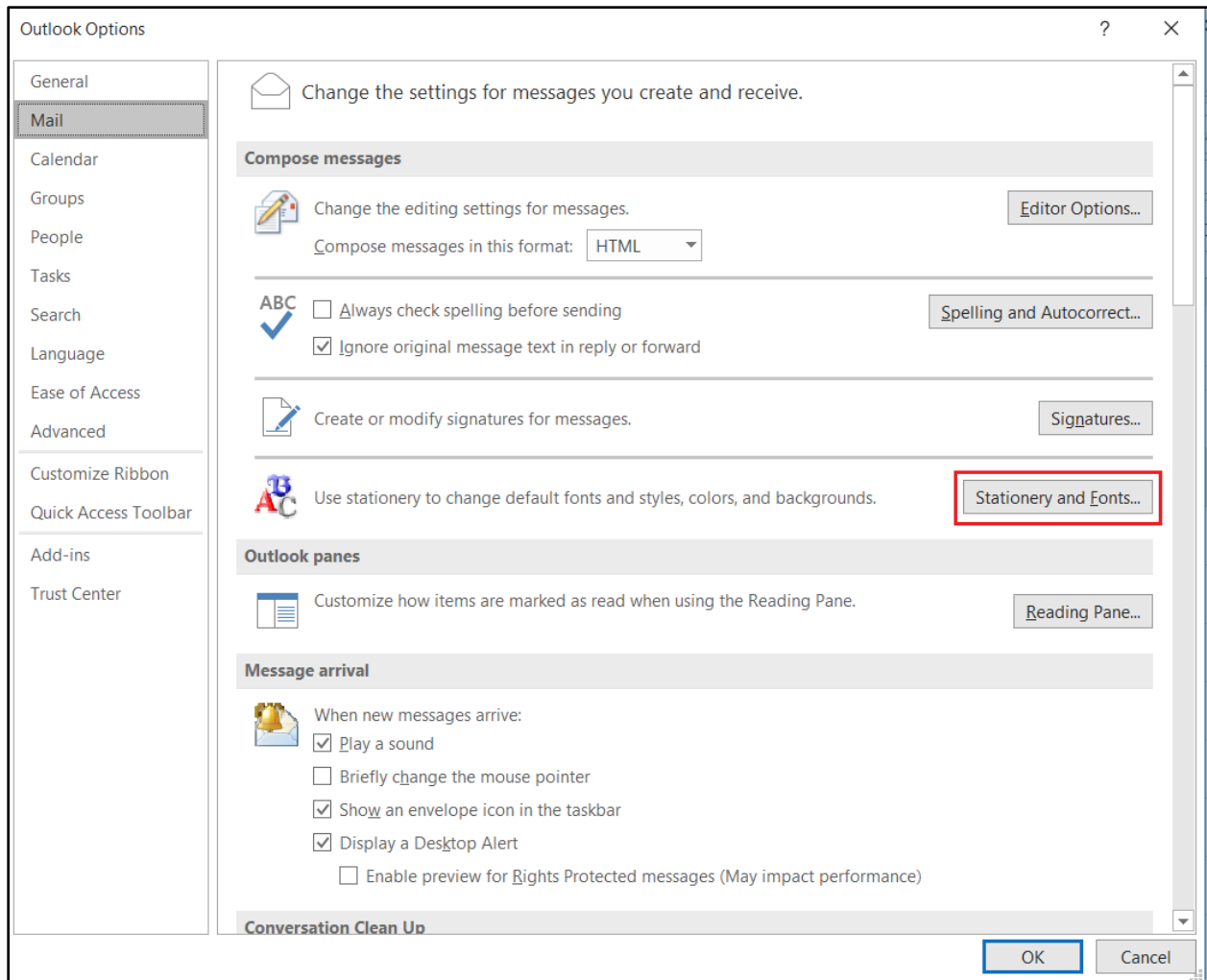
Figure 54: The **Stationery and Fonts** button

The **Signatures and Stationery** dialog box opens, which offers formatting options for new messages, replies, and forwarded messages. The following screenshot points out the **New mail messages** and **Replying or forwarding messages** sections in the **Signatures and Stationery** dialog box.
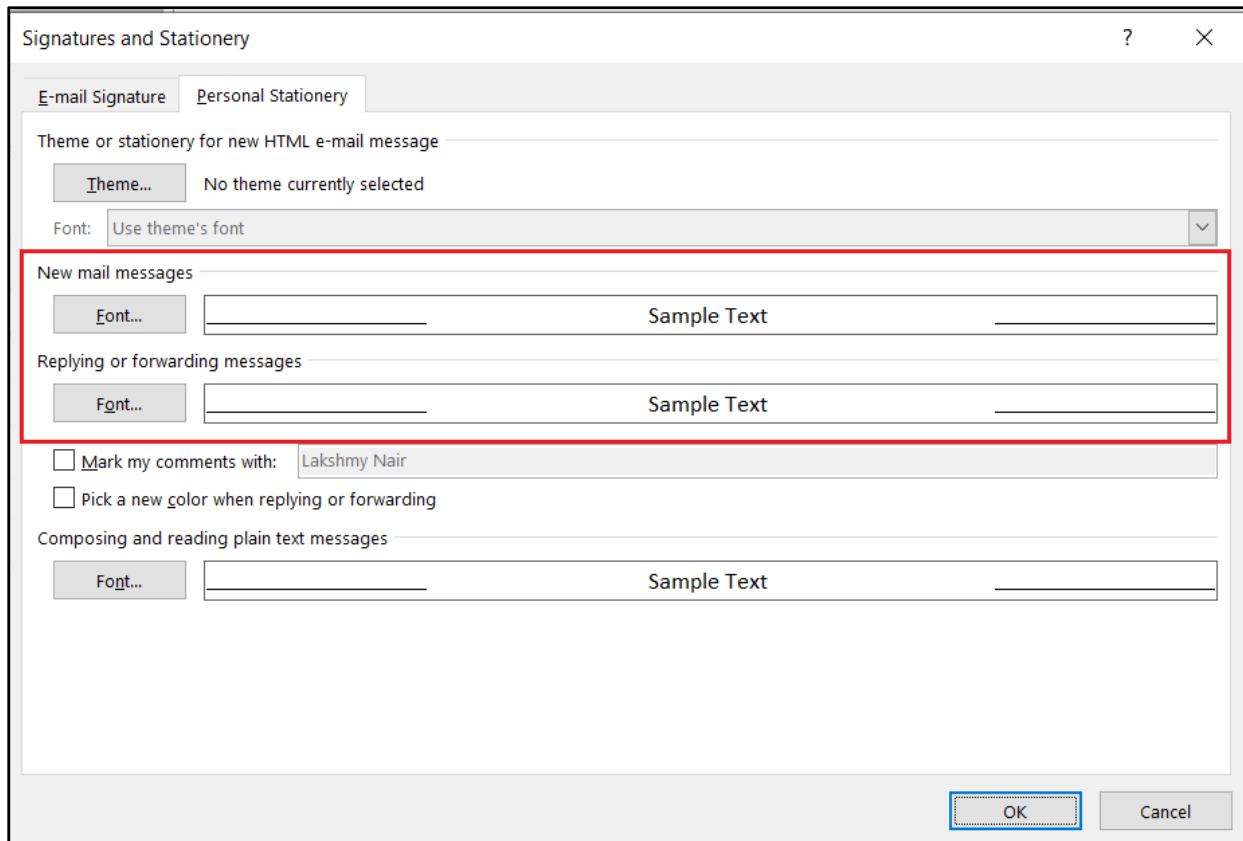
*Figure 55: The **Signatures and Stationery** dialog box*

Customize your message fonts

To customize your message fonts in Outlook, perform the following steps:

1. In the **Calendar** workspace, on the **File** tab, select **Options**.

2. In the **Outlook Options** dialog box, in the navigation pane on the left side, select **Mail**.

3. Select **Stationery and Fonts**.

4. In the **Signatures and Stationery** dialog box, select **Font**, and then select the formatting options you want.

5. Select **OK** to close the **Font** window.

6. In the **Signatures and Stationery** dialog box, select **OK** to save your customizations.

7. Select **OK** to close the **Outlook Options** dialog box.

In addition to formatting options, other options exist that specify how Outlook will process messages in your Inbox when you reply to messages or forward them. The **Mail** settings of the **Outlook Options** dialog box also makes these options available, as the following screenshot depicts.
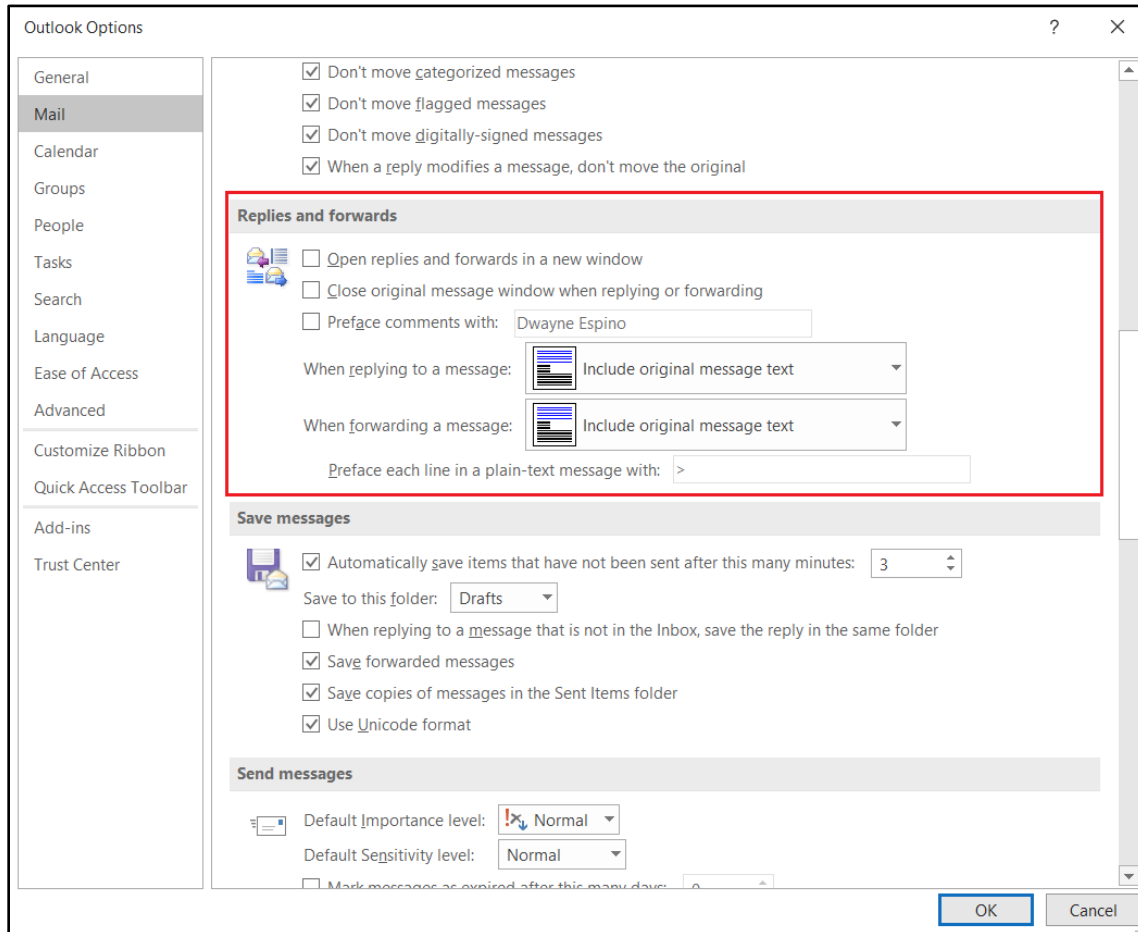
*Figure 56: The **Replies and forwards** section*

With some of the options for replies and forwarded messages, you can:

- Open the message in a new window.
- Close the original message.
- Preface comments with your name or custom information.
- Include the original content in your replies and forwarded messages.

Customize your reply settings

1. In the **Calendar** workspace, on the **File** tab, select **Options**.

2. In the **Outlook Options** dialog box, in the navigation pane on the left side, select **Mail**.

3. Scroll to the **Replies and forwards** section.

4. Explore the options, and set them according to your preferences.

5. Select **OK** to save your customizations.

6. Select **OK** to close the **Outlook Options** dialog box.

Activity: Show and tell

In this activity, your teacher will demonstrate how to customize your settings for replies and forwarded messages in Outlook.

Resources required

You'll need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Observe the teacher's demonstration of the settings.

2. Ask and answer questions.

Try-it: Customize your message settings

You're almost done setting up your new account! The last step is to customize how your content will appear in new messages, replies, and forwarded messages and how Outlook will automatically process your messages. In this leveled try-it activity, you'll customize how your replies and forwarded messages will appear and the other settings available for those messages.

Try-it 1

In this try-it, you'll customize the default fonts for new messages, replies, and forwarded message.

Resources

You'll need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Customize the default font for new messages.

2. Customize the default font for replies and forwarded messages.

Try-it 2

In this try-it, you'll customize the available settings for replies and forwarded messages.

Resources

You will need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Customize the default font for new messages.

2. Customize the default font for replies and forwarded messages.

3. In the **When replying to a message** list, select **Include and indent original message text**.

4. In the **When forwarding a message** list, select **Attach original message**.

Wrap-up

How confident do you feel about what this lesson covered? Participate in the activity to share your comfort level with what you learned.

Use these questions to check what you learned in this lesson:

1. Which type of account can have signatures automatically added to messages?

   Select the correct option.

   a. Web-based email (HTTP) account

   b. POP3 email account

   c. Exchange Server account

   d. All of the preceding answers

2. What's the least amount of time for defining a workday?

   Select the correct option.

   a. 1 minute

   b. 30 minutes

   c. 2 hours

   d. 8 hours

Glossary

The following table defines the key terms used in the module.

Backstage view	The view on the **File** tab, where you can access all the settings and options.
Default setting	A preset value for an option that the app has set.
Folder Pane	The place to review all your folders, including those for mail, the calendar, tasks, and notes.
Message Pane	The place that displays the messages for the currently selected folder.
Navigation Bar	Icons at the bottom of the **Navigation Pane** that you can use to switch among **Mail**, **Calendar**, **People**, **Tasks**, **Notes**, **Folders**, and **Shortcuts**.
Navigation Pane	The place where you can switch among different areas of Outlook, such as **Mail**, **Calendar**, **Contacts**, **Tasks**, **Notes**, and other folders.
Quick Access Toolbar	A customizable toolbar that contains a set of commands determined by individual preferences.
Ribbon	The command bar found at the top (or beginning) of the workspace that consists of multiple tabs and options.
Signature	A customizable block of contact information that Outlook automatically adds to new messages.
Status bar	The horizontal bar at the bottom of the screen that displays the status of the app.

Microsoft

Tabs	UI elements you can select to reveal the options.
Time zone	A region of the globe that determines the standard time for scheduling.
To-Do Bar	The customizable pane that displays **Calendar**, **Tasks**, or **People** information based on individual preferences.
View	A preset or customizable way to observe information in an Outlook workspace.

Table 8: Glossary terms and definitions

Cornerstone

Overview

In this Cornerstone, you'll refine the settings in Outlook to accommodate expanded duties at the farm.

Objectives

The following table outlines the Cornerstone objectives and their corresponding Microsoft Office Specialist (MOS) exam objectives.

Cornerstone project objective	MOS exam objectives
Get familiar with the ribbon and manage the ribbon display options	• None
Change the Quick Access Toolbar to help you work efficiently	• None
Explore the different ways to review your mail	• 1.1.1: Change the display of messages, calendar items, contact records, and tasks
Explore the different ways to review and navigate your calendar	• 1.1.1: Change the display of messages, calendar items, contact records, and tasks
Explore the different ways to review your contacts	• 1.1.1: Change the display of messages, calendar items, contact records, and tasks
Customize your calendar by setting working times	• 3.1.1: Set calendar work times
Create and assign automatic signatures	• 1.2.3: Create, assign, and modify signatures
Customize the settings for new messages, replies, and forwarded messages	• 1.1.1: Change the display of messages, calendar items, contact records, and tasks • 1.2.1: Specify default fonts for new messages and responses • 1.2.2: Customize reply message settings

Table 9: Cornerstone objectives mapped to MOS exam objectives

Microsoft

Duration

50 minutes

Instructions

1. Complete the tasks in following section for each file.

2. When you're done with the Cornerstone, assess your completion, and then enter the points you think you earned in the task lists. You can get help from your teacher if needed.

Tasks

You'll need two files for this Cornerstone:

- Open **Email_signature.docx** in the Cornerstone's Learning Activity Resources.
- Open **Munsons_logo_square_illustration.png** in the **Media** folder under **Student Materials**.

The following sections describe the tasks you'll need to do for this Cornerstone.

Task: Customize the ribbon display options (4 points)

1. Open Outlook 2019, and then hide the **Send/Receive** tab. (2 points)

2. Rearrange the tabs so that the first three are **View**, **Folder**, and **Home** in that order. (2 points)

Points scored: _____ / 4

Task: Customize the Quick Access Toolbar (4 points)

1. Add **Print** and **Find a Contact** to the **Quick Access Toolbar**. (2 points)

2. Remove **Print** and **Find a Contact** from the **Quick Access Toolbar**. (2 points)

Points scored: _____ / 4

Task: Customize the Mail, People, and Calendar workspaces (12 points)

1. Change the **Mail** view to **Compact**. (2 points) (Exam objective 1.1.1)

2. In the **Mail** workspace, change the message preview to three lines. (2 points) (Exam objective 1.1.1)

Microsoft

3. In the **Calendar** workspace, change the color to light blue. (2 points) (Exam objective 1.1.1)

4. Set the time scale to **15 minutes**. (2 points) (Exam objective 1.1.1)

5. In the **People** workspace, display your contacts by phone number. (2 points) (Exam objective 1.1.1)

6. Minimize the **Folder Pane**. (2 points) (Exam objective 1.1.1)

Points scored: _____ / 12

Task: Create a signature and assign it to messages (10 points)

1. Create a new signature, and name it **Events**. (3 points) (Exam objective 1.2.3)

2. Format the signature by using the formatting in **Email_signature.docx** and by inserting **Munsons_logo_square_illustration.png**. (4 points) (Exam objective 1.2.3)

3. Apply the signature to new email messages. (3 points) (Exam objective 1.2.3)

Points scored: _____ / 10

Task: Update your working time (6 points)

1. Change your working days so you have a four-day work week (from Wednesday through Saturday). (2 points) (Exam objective 3.1.1)

2. Set your daily schedule to 12:00 PM or 12:00 through 6:00 PM or 18:00. (2 points) (Exam objective 3.1.1)

3. Change the first day of the week to Monday. (2 points) (Exam objective 3.1.1)

Points scored: _____ / 6
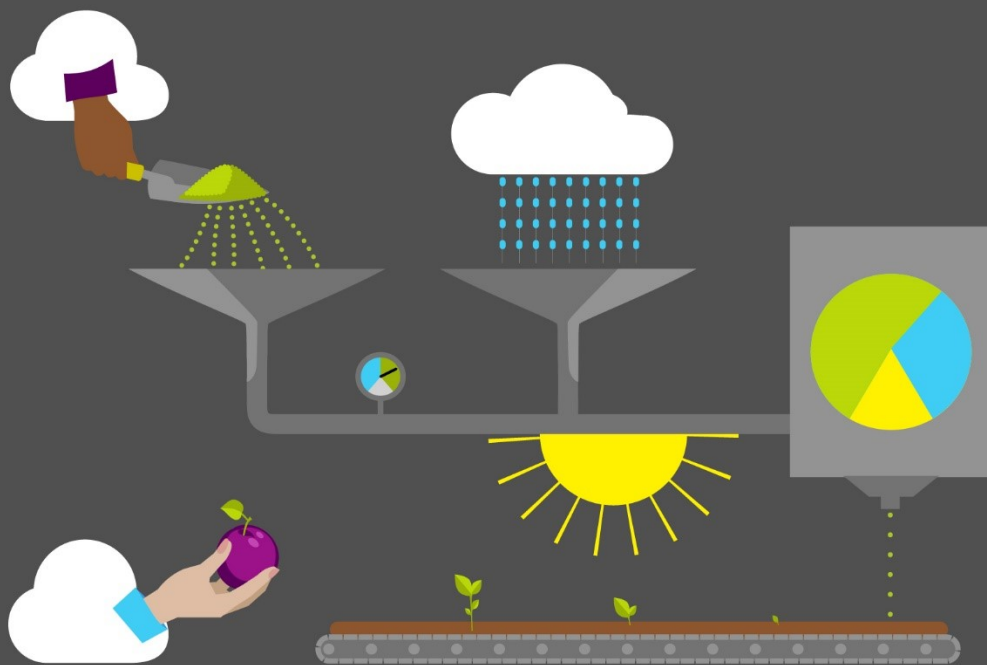
Task: Customize your message settings (6 points)

1. For new messages, apply **Arial** for the font, **12** for the font size, and **italic**. (3 points) (Exam objective 1.2.1)

2. For replies and forwarded messages, apply **Calibri** for the font, **14** for the font size, and **bold**. (3 points) (Exam objective 1.2.2)

Points scored: _____ / 6

Total points: _____ / 42

Microsoft

Student Guide

40569A
Microsoft Outlook associate 2019

Module 2: Composing and managing email

Contents

Microsoft

Microsoft

Module overview

Description

Email is an important productivity tool in your own life and in the modern workplace. Microsoft Outlook 2019 supports basic email features such as Cc and Bcc, but it also offers unique features to make email even more useful, such as @mentions, attachment previewing, and robust formatting options. This module covers composing emails and a variety of tools for managing the content of both incoming and outgoing messages.

The following table outlines the lessons in this module and their corresponding learning objectives.

Lesson	Learning objective	Exam objectives
Composing email messages	Compose emails, add content, and format the content in emails.	2.1.2 2.1.3 2.1.5 2.1.6 2.2.1 2.2.2 2.2.3
Corresponding via email	Share message content in print and electronic format.	1.4.1 2.1.4
Working with message attachments	Add attachments to outgoing messages and preview or manage attachments in incoming messages.	1.4.2 1.4.3 1.4.4 2.1.1

Microsoft

Lesson	Learning objective	Exam objectives
Cornerstone: Managing the communications for a planting project	Create new email messages, respond to email by using reply and forward, and manage email attachments.	• 1.4.2 • 1.4.4 • 2.1.1 • 2.1.2 • 2.1.3 • 2.1.4 • 2.1.5 • 2.1.6 • 2.2.1 • 2.2.2

Table 1: Objectives by lesson

Scenario

Munson's Pickles and Preserves Farm takes pride in its efforts to protect the environment and conserve scarce resources through environmentally sound farming practices. Last fall, the farm planted a cover crop on hillier fields to reduce soil erosion, and this spring, it's using no-till planting equipment to further protect the soil. As an intern in the Media and Communications department, your job is to manage the communications related to this planting project.

Cornerstone

This module concludes with a Cornerstone activity, in which you'll create new email messages, forward and respond to email, and manage attachments to both incoming and outgoing email.

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Lesson 1: Composing email messages

Overview

In this lesson, you'll learn how to compose email messages, format the text of a message, indicate that a message is of high importance or requires follow-up, and add content to a message. The activities, discussions, and demonstrations in this lesson will strengthen your learning and give you the opportunity to practice what you learn.

Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Which of the following features can you use to confirm that a recipient has opened a message?

   Select the correct option.

   a. **@mention**

   b. **Bcc**

   c. **Follow Up**

   d. **High Importance**

   e. **Read Receipt**

2. Which of the following do you use to mark a message that you must remember later?

   Select the correct option.

   a. **@mention**

   b. **Bcc**

   c. **Follow Up**

   d. **High Importance**

   e. **Read receipt**

Microsoft

3. How can you add a hyperlink to the body of a message?

   Select all that apply.

   a. From the **Insert** tab on the ribbon

   b. From the **Format Text** tab on the ribbon

   c. By dragging a page from your web browser

   d. By entering the web address and selecting the Spacebar, Tab, or Enter.

4. To include a/an _____ in a message, you can add it as an attachment or insert it in the body of the message.

   Fill in the blank space.

5. To flag a message that you want to remember later, use the _____ command.

   Fill in the blank space.

6. To send a copy of an email to someone who isn't a recipient, use the _____ line.

   Fill in the blank space.

Attach the module .pst file

To provide the most effective learning experience, this module includes several starter elements such as emails, calendar appointments, tasks, and contacts. These elements are stored in an external Outlook Data File, or .pst file. It resides in a location that your teacher will provide. To complete this module, you must attach this .pst file into Outlook before you can perform any try-its. You'll also store the results of your try-its in this .pst file. This allows your teacher to assess your work by examining the .pst file's contents.

To open the .pst file in Outlook:

1. Open Outlook.

2. Select the **File** tab, and then select **Open & Export**.

3. In the **Open** pane, select **Open Outlook Data File**.

4. In the **Open Outlook Data File** dialog box, use the navigation pane to locate the .pst files provided by your instructor for your use throughout this module of the course.

5. Open the file named **M2_module_PST_starter**. Note that a folder **M2_module_PST_starter** is now available in the **navigation** pane. This folder contains any required starter elements for the module, such as emails, calendar appointments, tasks, and contacts.

6. Right-click or access the context menu for the **M2_module_PST_starter** folder, and then select **Properties**.

7. In the **M2_module_PST_starter Properties** dialog box, select **Advanced**.

8. In the **Outlook Data File** dialog box, in the **Name** box, append your name to the end of the existing name by using underscores instead of spaces. For example, enter **_Firstname_Lastname**. The folder name should now resemble **M2_module_PST_starter_Firstname_Lastname**.

9. Select **OK** twice.

Copy content into the module .pst file

As you proceed through this module's try-its, you should copy the resulting elements, such as emails, calendar appointments, tasks, and contacts, to the **M2_module_PST_starter_Firstname_Lastname** folder by using the following instructions:

1. After you attach the .pst file, you should be able to observe duplicate folders for items such as emails, calendar appointments, tasks, and contacts.

2. After you complete a try-it exercise, select your resulting items in the navigation pane. Make sure you select the items that are associated with your email account.

3. In the details pane, right-click or access the context menu for each item, and then select **Copy** or select Ctrl+C.

4. Select the **M2_module_PST_starter_Firstname_Lastname** folder.

5. Select Ctrl+V to copy the item to the .pst file.

6. Repeat steps 3 through 5 for any additional items that you want to copy.

Topic 1: Compose an email message

One of the most common tasks that you'll undertake in Outlook is creating a new email to send to one or more recipients. Composing a simple email message is very straightforward, but Outlook makes this process easier. You can also take advantage of a variety of features to make your messages more useful for recipients. In addition to specifying one or more recipients, you can use **Cc** and **Bcc** to communicate with additional people. You can also use **@mentions** to get someone's attention or request a read receipt to let you know who has read your message.

Microsoft

Create and address an email message

To begin composing a new message, select the **Home** tab on the ribbon, and then in the **New** group, select **New Email** or select Ctrl+N. The following screenshot depicts the **New** group with **New Email** highlighted:
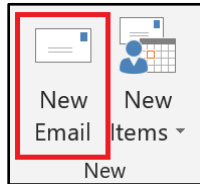
*Figure 1: The **New** group with **New Email** highlighted*

Outlook will open a **Message** window for new email. In this window, you can compose your email, and as you'll learn in the next lesson, format the text of your message. When starting a new email, Outlook opens a new window with a different ribbon that has a variety of options to customize the new message. You can also specify the recipients of your message. The following screenshot depicts the **Message** window:
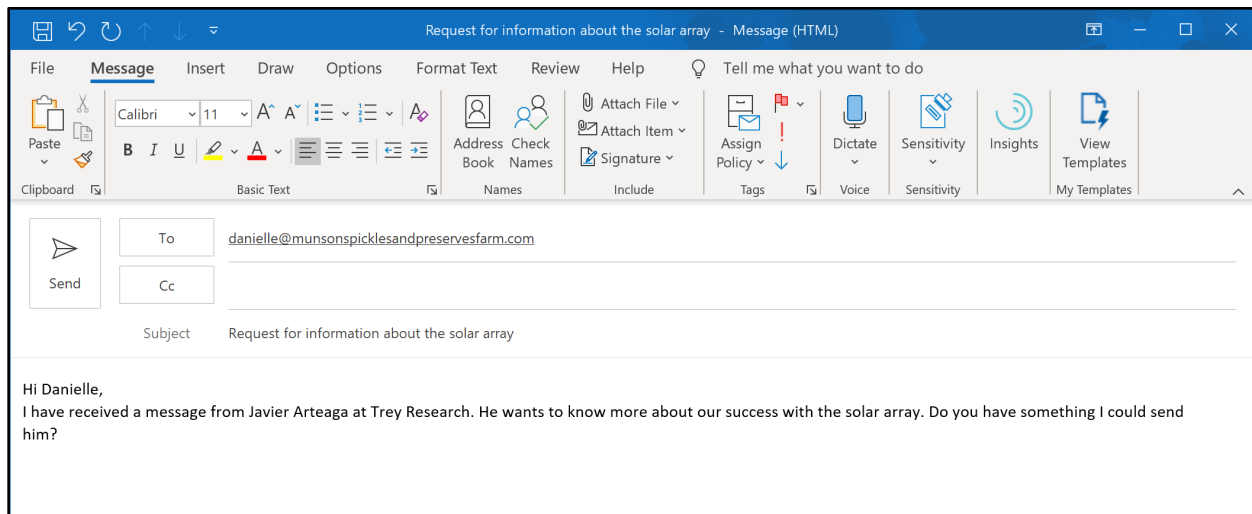
*Figure 2: The **Message** window*

To specify recipients for the message, select the **To** text box. Enter the email address of the recipient of the message. If you want to send the message to more than one person, separate each email address with a semicolon.

Send copies of email

Sometimes, you might want someone else to get a copy of a message even though they aren't the primary recipient. For example, if you're working on a group project and have a question for one of your partners, you might want the other students in the group to observe the message as well so that they don't get left out of the conversation. To send a copy of the message to someone who isn't the recipient, you can use the **Cc** or *courtesy copy* option. Select the **Cc** text box and enter their email address. You can use semicolons to separate multiple addresses, just like you can with the **To** text box.

There's one other way to send a copy to someone who isn't the primary recipient. This is the **Bcc** or *blind courtesy copy* option, which sends a copy of an email message to an individual without the recipients in the **To** and **Cc** boxes knowing. A blind copy is a great way to preserve privacy. Email addresses that you enter in the **To** or **Cc** boxes are available to everyone who gets the message, but email addresses in **Bcc** box are not. For example, suppose you want to send product information to a variety of customers, but you don't want to send separate emails for each. Customers might not appreciate the sharing of their email addresses, so you could put them in the **Bcc** line to keep them private. **Bcc** is often used when sending information to many addresses while keeping those conversations separate. When you use **Bcc** and one of your recipients sends a reply by using **Reply to All**, other **Bcc** recipients won't receive those replies.

By default, **Bcc** isn't available in the **Message** window. To display it, select the **Options** tab, and then select **Bcc** in the **Show Fields** group. After you turn on **Bcc**, it will display each time you compose a new message until you turn it off again. The following screenshot depicts the **Show Fields** group with **Bcc** highlighted.
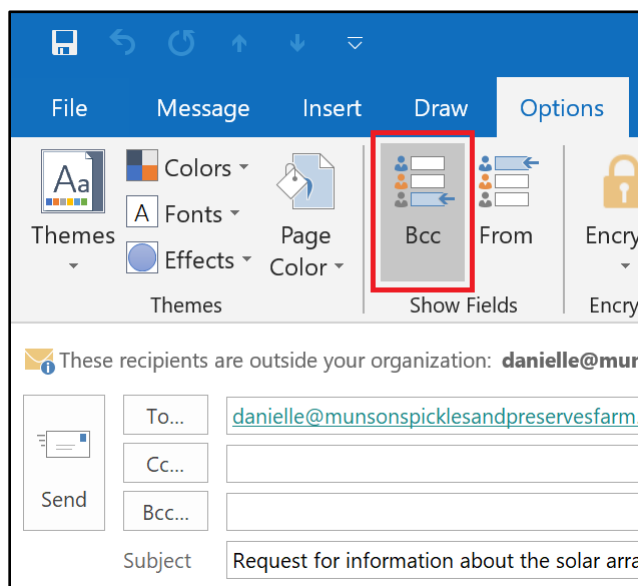
*Figure 3: The **Show Fields** group with **Bcc** highlighted*

Microsoft
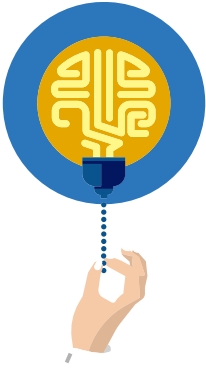
Did you know?

Some email systems might flag messages with **Bcc** recipients as junk or spam, so make sure the recipient is expecting the message.

Additional information

For more information on composing and addressing an email, go to: [Create and send email in Outlook](#)
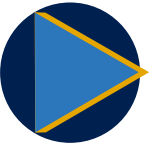
Video

To review the video on composing and addressing an email, go to: [Create an email message](#)

Use @mentions

You often might send email to several people at the same time, and it's easy for a recipient to miss something that was intended just for them. You can use **@mentions** to get the attention of individuals in your message. When you do, that person's name will be highlighted in the message body and their email address will be added to the **To** box if it isn't already there. They will also notice the **@** symbol next to the message in their **Inbox**, notifying them that they are mentioned specifically in the message.

Add an **@mention** to the body of a message by entering the at sign (**@**) and the first few letters of the contact's first name, last name, or email address. Outlook will offer suggestions based on that information. Select the contact from the suggestions list. The following screenshot depicts this:

Microsoft
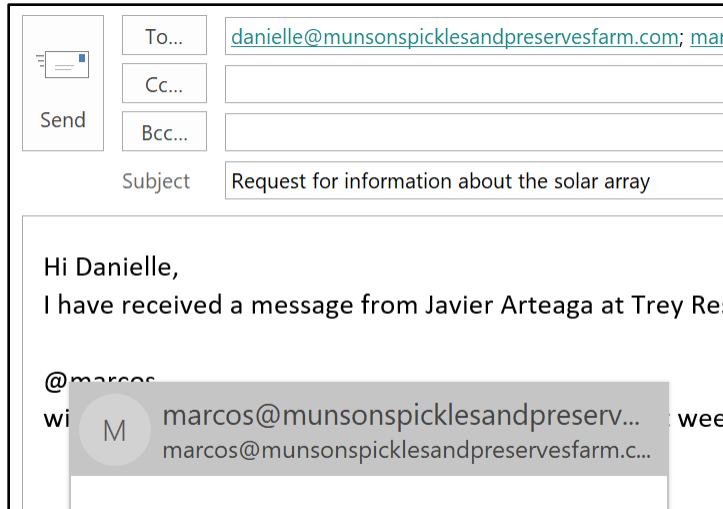
*Figure 4: Example of the suggestions that Outlook supplies when creating an **@mention***

By default, an **@mention** displays the full name, but you can delete portions of the name. The following screenshot depicts an **@mention** with the last name deleted, leaving only the first name:
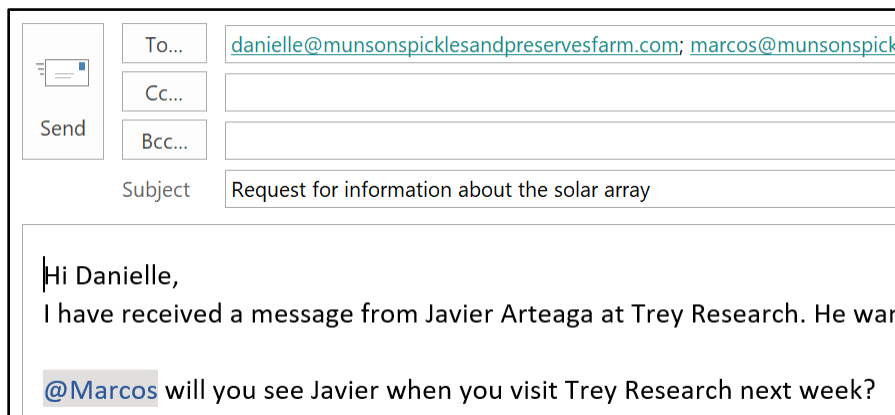
*Figure 5: Example of an **@mention** with the last name deleted, leaving only the first name*
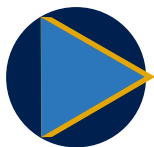
Video

To review the video on **@mentions**, go to: Use @mentions to get someone's attention

Add a read receipt to a message

Sending a message and not knowing if anybody has read it can be very frustrating! To help with this, Outlook supports read receipts, which is a confirmation that email recipients have read your message. Outlook also gives recipients the option to decline sending a read receipt, and some email programs don't support them. Therefore, the lack of a read receipt doesn't necessarily mean that the recipient didn't read the message. However, read receipts can be useful as a way for recipients to acknowledge messages without replying.

You must add a read receipt request before you send the message. To add a read receipt, perform the following steps:

1. In the **Message** window, select the **Options** tab on the ribbon.

2. In the **Tracking** group, select **Request a Read Receipt**. The following screenshot depicts the **Tracking** group with the **Request a Read Receipt** check box selected:
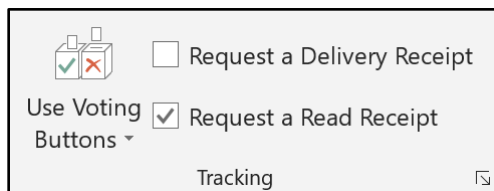
*Figure 6: The **Tracking** group with the **Request a Read Receipt** check box selected*
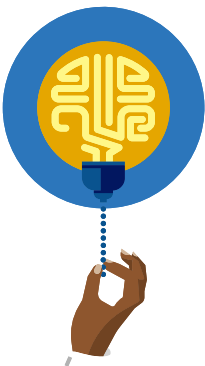
Did you know?

To observe read receipts, you must open the original message that you sent, which is in the **Sent Items** folder. Then, select the **Message** tab, and select **Tracking** in the **Show** group. **Tracking** doesn't appear until at least one receipt has been received.

Additional information

To review the video on requesting and reviewing read receipts, go to: [Add and request read receipts and delivery notifications](#)

Activity: Pick a card, any card

In this activity, you'll work with other students to create an email based on the card that you received (or the prompt that you were assigned) at the start of the lesson.

Resources required

You'll need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Find the other student or students with the same card or prompt.

2. Working as a group, compose an email to other students based on the prompt, as directed.

Try-it: Compose an email message

In this leveled try-it activity, you'll practice composing a new email message that will include both a message body and one or more recipients.

Try-it 1

Resources

You'll need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you must perform during this try-it:

1. Use the ribbon to create a new email message.

2. Set the **Subject** line to **Quotations for a news article**.

3. Set the **To** line to **marcos@munsonspicklesandpreservesfarm.com** or to your teacher's email address as directed.

4. Edit the body of the message to include the following text:

Hi Marcos,

I've received an inquiry from a local journalist who is interested in writing an article about our no-till planting initiative. Can you provide a short quotation about the long-term impact it will have on the farm?

5. Copy the **Quotations for a news article** message to **M2_module_PST_starter_Firstname_Lastname**.

Try-it 2

Resources

You'll need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you must perform during this try-it:

1. Use a keyboard shortcut to create a new email message.

2. Set the **Subject** line to **Quotations for a news article**.

3. Set the **To** line to **marcos@munsonspicklesandpreservesfarm.com** or to your teacher's email address as directed.

4. Edit the body of the message to include the following text:

Hi Marcos,

I've received an inquiry from a local journalist who is interested in writing an article about our no-till planting initiative. Can you provide a short quotation about the long-term impact it will have on the farm?

5. Remember to send or save your draft as directed by the teacher.

6. Copy the **Quotations for a news article** message to **M2_module_PST_starter_Firstname_Lastname**.

Try-it 3

You'll need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you must perform during this try-it:

1. Use the ribbon or a keyboard shortcut to create a new email message.

2. Set the **Subject** line to **Quotations for a news article**.

3. Set the **To** line to **marcos@munsonspicklesandpreservesfarm.com** or to your teacher's email address as directed.

4. Add the email address **danielle@munsonspicklesandpreservesfarm.com** to the **Cc** line, or add the email address of a student as directed.

5. Add the email address **fernando@munsonspicklesandpreservesfarm.com** to the **Bcc** line, or add the email address of a student as directed.

6. At the beginning of the message body, use an **@mention** for **marcos@munsonspicklesandpreservesfarm.com**, or add an **@mention** for another student as directed.

7. Following the **@mention**, add the following text:

   I've received an inquiry from a local journalist who is interested in writing an article about our no-till planting initiative. Can you provide a short quotation about the long-term impact it will have on the farm?

8. Copy the **Quotations for a news article** message to **M2_module_PST_starter_Firstname_Lastname**.

Topic 2: Apply formatting and setup options

Email has evolved beyond simple text-only messages. Adding some formatting to your messages can make them easier to read and much more professional. Before you send a message, Outlook can also help you find and correct misspelled words and indicate the importance of the message to its recipients. You can also flag messages so that you remember to follow up on them later.

Microsoft

Apply formatting to a message

Outlook provides tools for formatting email messages that are very similar to formatting features in other Microsoft Office apps, such as Microsoft Word.

To change the size, font, or formatting of text in a message, begin by selecting the text that you want to format. Next, select the **Message** tab on the ribbon. The **Basic Text** group includes some of the most used formatting options, such as **Font**, **Font Size**, **Bullets**, and **Numbering**. Select the formatting that you want to apply. The following screenshot depicts the **Basic Text** group on the **Message** tab:
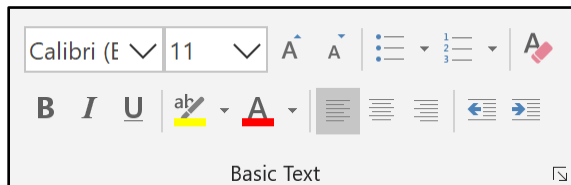
*Figure 7: The **Basic Text** group on the ribbon*

To access additional formatting features, select the text to format and then select **Format Text** on the ribbon. Commands in the **Font** group make it possible to change a variety of font settings. The following screenshot depicts the **Font** group in the **Format Text** tab:
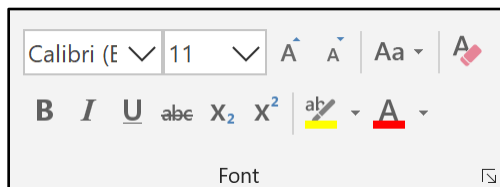
*Figure 8: The **Font** group on the **Format Text** tab*

The **Paragraph** group includes tools for creating lists, changing alignment, and other paragraph formatting options. The following screenshot depicts the **Paragraph** group on the **Format Text** tab:
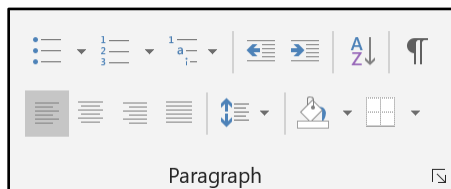
*Figure 9: The **Paragraph** group on the **Format Text** tab*

Microsoft

You can use the **Styles** group on the **Format Text** tab to apply a predefined text style. Select the text that you want to style, and then select **Format Text**. In the **Styles** group, use the **Styles** gallery to select the style that you want to apply. To access additional styles, select **More**, which is depicted as a **Down** arrow on the right-hand side of the **Styles** gallery. The following screenshot depicts the **Styles** group on the **Format Text** tab.
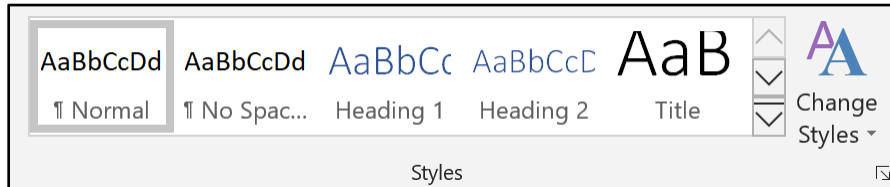
*Figure 10: The **Styles** group on the **Format Text** tab with **More** highlighted*

Additional information

For more information on applying formatting to a message, go to:
Change the size or formatting of text

Check for spelling errors

As you compose a message, Outlook will automatically check your spelling. It will indicate a misspelled word by underlining it with a wavy line. You can get help correcting the error by right-clicking or accessing the context menu on the misspelled word. Then, select the correction that you want. If you want to ignore the misspelling, select **Ignore All** and Outlook won't flag the misspelling again in that message. If the word is spelled correctly, select **Add to Dictionary** to add the word to the Outlook spelling dictionary, and Outlook won't flag the added word as wrong in any future messages. The following screenshot depicts the context menu for a misspelled word:

Microsoft
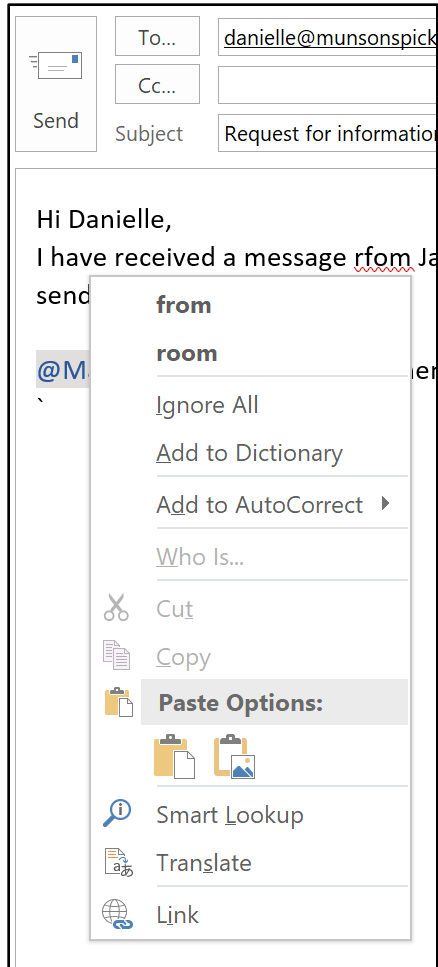
Figure 11: The context menu for a misspelled word

You can also check and correct the spelling of the entire message at once. Select the **Review** tab on the ribbon, and then in the **Proofing** group, select **Spelling & Grammar**. The following screenshot depicts the **Proofing** group on the **Review** tab, with **Spelling & Grammar** highlighted:
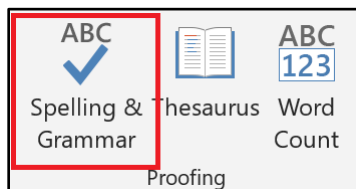
*Figure 12: The **Proofing** group on the **Review** tab, with **Spelling & Grammar** highlighted*

If **Spelling & Grammar** finds a misspelled word, it will open the **Spelling and Grammar** dialog box. To replace the word, select a new word in **Suggestions**, and then select **Change**. Select **Ignore Once** to skip just this instance of the misspelling or select **Ignore All** to ignore the misspelling throughout the message. Selecting **Add to Dictionary** will add the flagged word to the Outlook dictionary so it's not flagged in future messages. The following screenshot depicts the **Spelling and Grammar** dialog box:
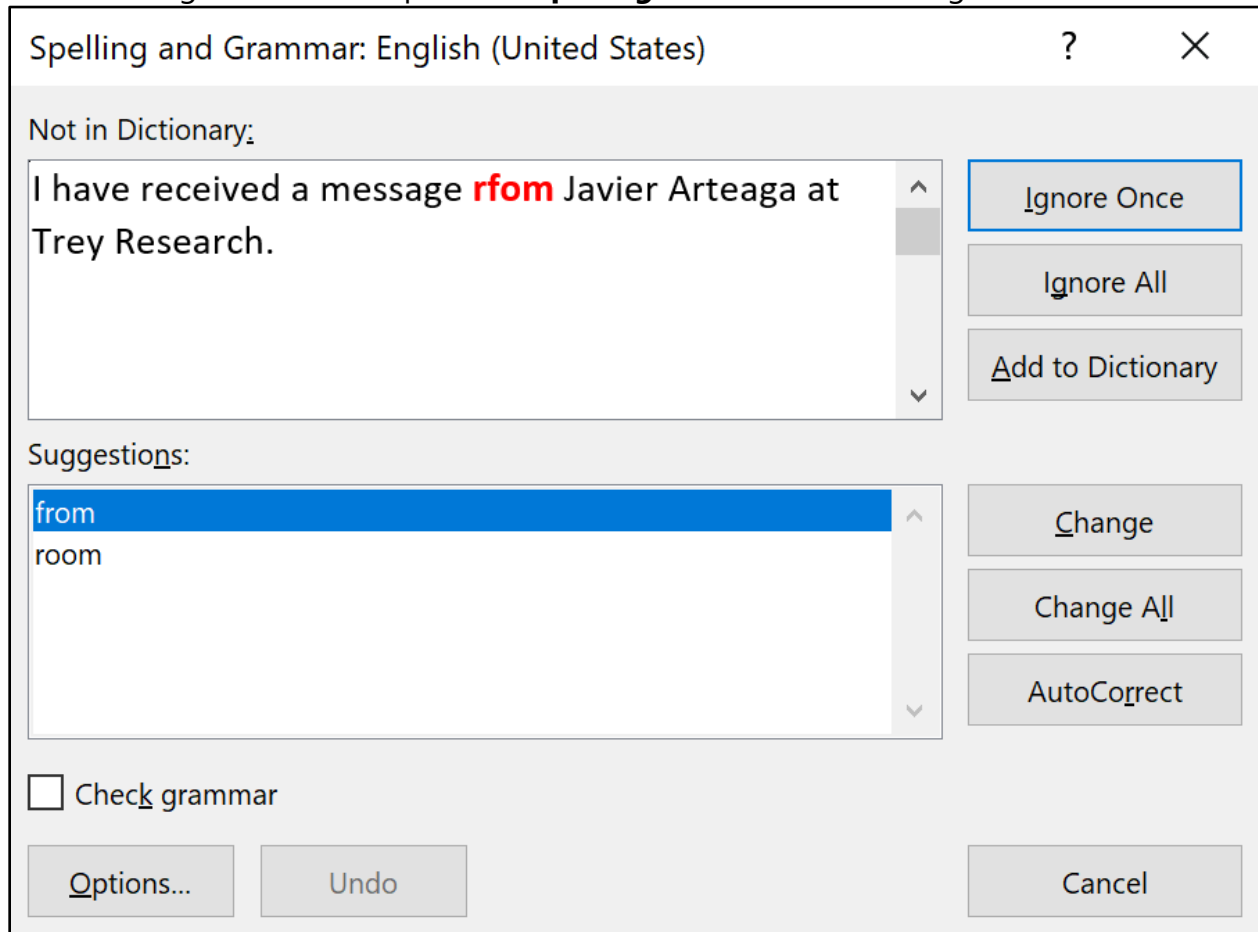
*Figure 13: The **Spelling and Grammar** dialog box*

Outlook includes a setting to check the spelling of all messages before they are sent. To enable this setting, select **File** on the ribbon, and then select **Options** in the **Microsoft Office Backstage** view. In the **Outlook Options** dialog box, select **Mail**. In the **Compose messages** section, select the **Always check spelling before sending** check box, and then select **OK**. The following screenshot depicts a part of the **Outlook Options** dialog box with **Mail** and **Always check spelling before sending** highlighted:
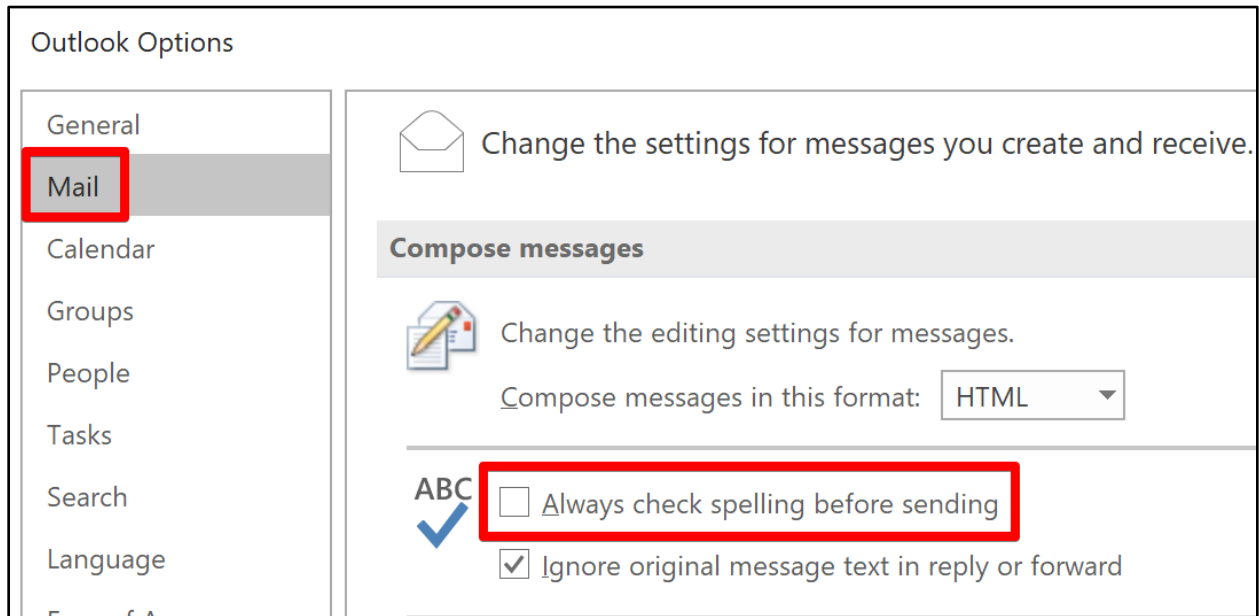
*Figure 14: A part of the **Outlook Options** dialog box with **Mail** and **Always check spelling before sending** highlighted*

With this option enabled, Outlook will run **Spelling & Grammar** automatically when you select **Send**. If it doesn't detect any misspelled words, it will send the message immediately. If it does find misspellings, it will open the **Spelling and Grammar** dialog box. Select **Cancel** to stop the spell check and continue editing the message.

Additional information

For more information on spell checking, go to: Check spelling before sending a message

Mark a message for high importance

You can use Outlook to mark a message with an indicator of the message's importance. If the message is urgent or particularly important, you can set the message as **High Importance**. If the message isn't related to work or is otherwise not urgent, you can set the message as **Low Importance**. The effect of this might vary depending on the email application the recipients are using, but most email programs use a highlight or icon to indicate the importance level.

It's important to be consistent and thoughtful with these indicators. If you unnecessarily mark messages as **High Importance**, recipients might become frustrated and could even start to ignore the tag. Likewise, messages that you mark as **Low Importance** might not be read until much later, when the recipient has free time. When everyone in the workplace uses flags appropriately, everyone can be more productive and manage their email inboxes more efficiently!

To set the importance indicator, select **New Email** to open the **Message** window. Select the **Message** tab on the ribbon, and then in the **Tags** group, select **High Importance** or **Low Importance**. The following screenshot depicts the **Tags** group on the **Message** tab:
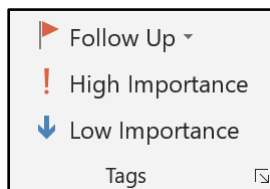
*Figure 15: The **Tags** group on the **Message** tab*

Additional information

To review the video on importance indicators, go to: [Mark a message as high or low importance](#)

Flag a message for follow-up

Many people receive a lot of email messages over the course of a day or week, and it's easy to become overwhelmed and lose track of all the things that need your attention. For example, you might send a message to a coworker asking for a copy of a document that you need this week, but you don't want to forget if they don't send it.

Outlook provides a follow-up option to help with just that kind of situation. When you send an email, you can mark the message for follow-up.

Select **New Message** to begin composing a new email message. Select the **Message** tab on the ribbon, and then in the **Tags** group, select **Follow Up**. In the drop-down options, select the day that you want to follow up on the message: **Today**, **Tomorrow**, **This Week**, or **Next Week**. If you don't want to assign a specific date to the flag, select **No Date**. The following screenshot depicts the **Tags** group on the **Message** tab, with **Follow Up** selected:
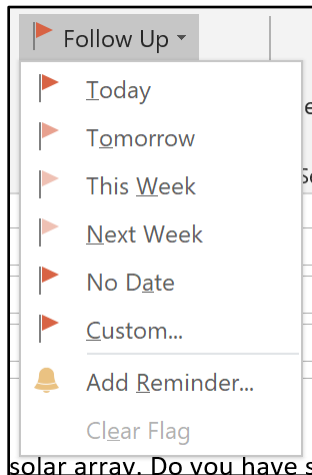
*Figure 16: The **Tags** group on the **Message** tab, with **Follow Up** selected*

The message will now be marked with the corresponding flag, which darkens as the follow up date approaches. Because the message will be in your **Sent Items** folder, where you might not notice the flag, you might want to add a *reminder*. A reminder is an alert dialog box that appears when the follow-up is due—the same dialog box for upcoming calendar events. To add a reminder, select the **Message** tab on the ribbon, and then in the **Tags** group, select **Follow Up**. In the drop-down options, select **Add Reminder** to open the **Custom** dialog box. Select the **Reminder** drop-down, select the date and time for the reminder to appear, and then select **OK**. The following screenshot depicts the **Custom** dialog box with the **Reminder** options highlighted:

*Figure 17: The **Custom** dialog box with the **Reminder** options highlighted*
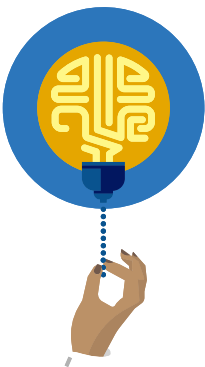
Did you know?

In the **Flag for Recipients** section in the **Custom** dialog box, you can specify a follow-up reminder date for recipients of the message. Recipients who use Outlook will observe the flag in their message list and before the **From** line when they open the message. The flag will also add an item to their to-do list in Outlook.

Microsoft

In the **Custom** dialog box, you can also choose any date as the due date for a follow-up. To set a custom date to follow up, select the **Message** tab on the ribbon, and then select **Follow Up** in the **Tags** group. In the drop-down options, select **Custom** to open the **Custom** dialog box. Select **Due date** and choose the date on which you'll follow up.

Additional information

To review the video on follow-up reminders, go to: Send an email message with a follow-up reminder

Activity: Think-pair-share

In this activity, you'll discuss message setup options with a partner and then share your ideas with the group.

Resources required

You'll need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Think about how message tagging features can help communicate with your recipients more efficiently.

2. When directed by the teacher, pair up and discuss your ideas with your partner.

3. Share your responses with the group.

Try-it: Apply formatting and setup options

In this leveled try-it activity, you'll practice formatting a message and setting **Follow Up** flags.

Try-it 1

In this try-it, you'll create a message with custom formatting.

Resources

You'll need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you must perform during this try-it:

1. Use the ribbon to create a new email message.

2. Set the **Subject** line to **Profiles for the news article**.

3. Set the **To** line to **marcos@munsonspicklesandpreservesfarm.com** or to your teacher's email address as directed.

4. Edit the body of the message to include the following text:

   Hi Marcos,

   Thank you for providing a quotation to the local writer. They would like some information about the staff members who are working on these initiatives. Is there someone here who can provide some basic profiles or biographies?

5. Select all the message body text from the previous step, and then set the **Font** to **Arial** and the **Font Size** to **14**.

6. In the message body text, apply the **Bold** style to the text **basic profiles or biographies**.

7. Remember to send or save your draft as directed by the teacher.

Try-it 2

In this try-it activity, you'll create an email message that includes custom flags.

Resources

You'll need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you must perform during this try-it:

1. Use the ribbon to create a new email message.

2. Set the **Subject** line to **Profiles for the news article**.

3. Set the **To** line to **marcos@munsonspicklesandpreservesfarm.com** or to your teacher's email address as directed.

4. Edit the body of the message to include the following text:

    Hi Marcos,

    Thank you for providing a quotation to the local writer. They would like some information about the staff members who are working on these initiatives. Is there someone here who can provide some basic profiles or biographies?

5. Mark the message **High Importance**.

6. Set a **Follow Up** flag for **Next Week**.

7. Remember to send or save your draft as directed by the teacher.

Topic 3: Add content to an email message

In addition to the many text formatting features that are available in Outlook, you can also add links and images to your messages. You can incorporate this content directly in the body of a message so that it's easily accessible to recipients. In this topic, you'll also learn how to save a draft of a message so that you don't lose your work.

Insert an image into the body of a message

You might be familiar with the idea of attaching an image to an email message, which you'll explore in Lesson 3 of this module. However, Outlook also makes it possible to insert pictures into the body of a message. These images appear as part of the message, so recipients don't need to open them individually to review their content. This helps you add helpful context. For example, if you're sending along two different design ideas, you can insert an image of each with your comments about each proposal.

To insert a picture in a message, while editing your message in the **Message** window, position the cursor where you want to insert the image. Select the **Insert** tab on the ribbon, and then select **Pictures** in the **Illustrations** group. The following screenshot depicts the **Illustrations** group with **Pictures** highlighted:
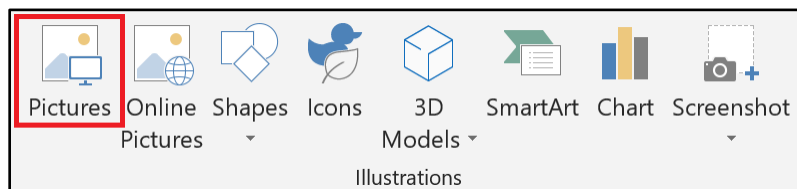
*Figure 18: The **Illustrations** group with **Pictures** highlighted*

This opens the **Insert Picture** dialog box. Browse to the location of the image that you want to insert, select the file, and then select **Insert**.
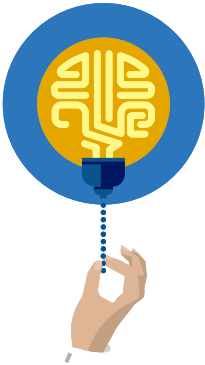
Did you know?

To insert a picture by using the keyboard, select Alt+N to select the **Insert** tab, and then select **P** to select **Pictures**.

Additional information

For additional information on inserting a picture into the body of an email message, go to: Attach files or insert pictures in Outlook email messages

Add a hyperlink to a message

Outlook automatically creates a hyperlink when it detects the address to a webpage. Simply input the address of the website and then select Enter, Space, or Tab to move the cursor. Outlook will then convert the address into a link.

To add a hyperlink manually, select the text or image that you want to convert to a link. Select the **Insert** tab on the ribbon, and then select **Link** in the **Links** group. The following screenshot depicts the **Links** group with **Link** highlighted:
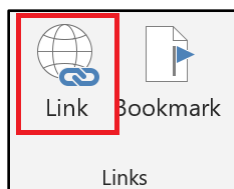
*Figure 19: The **Links** group with **Link** highlighted*

The **Insert Hyperlink** dialog box will appear. In the **Link to** section, select **Existing File or Web Page**, select **Address**, enter the address that you want to link, and then select **OK**. The following screenshot depicts the **Insert Hyperlink** dialog box with **Address** highlighted:
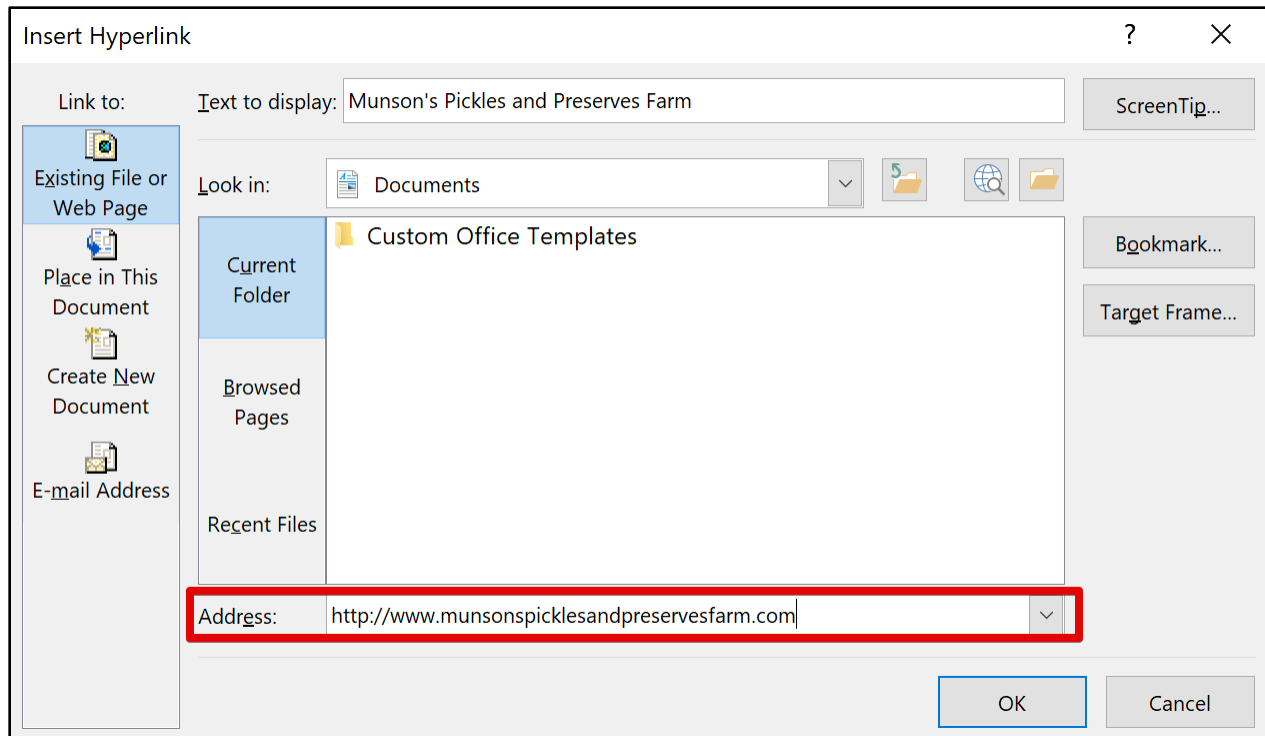
*Figure 20: The **Insert Hyperlink** dialog box with **Address** highlighted*
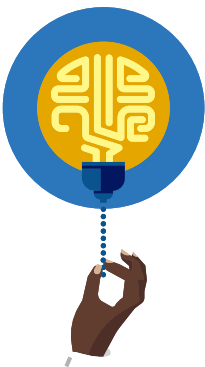
Did you know?

The keyboard shortcut to insert a hyperlink is Ctrl+K.

You can also create a hyperlink from the context menu. Right-click or access the context menu for the image that you want to link, and then select **Link** to open the **Insert Hyperlink** dialog box. The following screenshot depicts the context menu with **Link** highlighted:
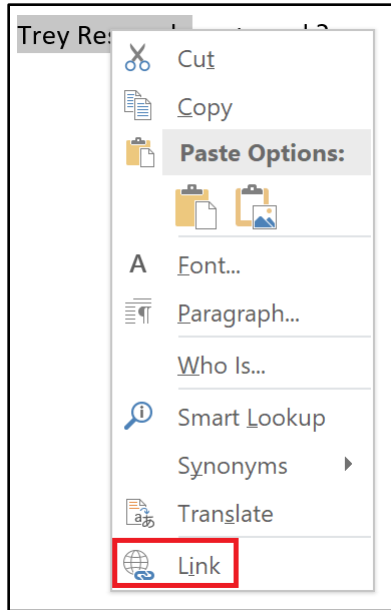
*Figure 21: The context menu with **Link** highlighted*

Additional information

For additional information on adding a hyperlink to a message, go to:
[Create or edit a hyperlink](#)

Save a message as a draft

As you compose an email message, Outlook saves your work every three minutes. A saved copy of an unsent message is called a *draft*, and it's saved in your **Drafts** folder. To open it, select **Drafts** in the **Folder Pane**, and then double-click the message or select the message and select Enter. This opens the draft in a **Message** window, where you can finish and send the message when you're ready.
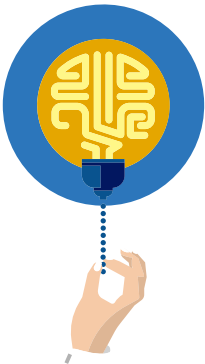
Did you know?

If you use Outlook for iOS or Outlook for Android, your unsent drafts will sync between devices. This means that you can start a message on your mobile device and finish it on your computer!

Microsoft

To save a draft manually, select **Save** in the **Quick Access Toolbar** or select the **File** tab, and then select **Save**. The following screenshot depicts a part of the **Message** window with the **Save** icon highlighted:
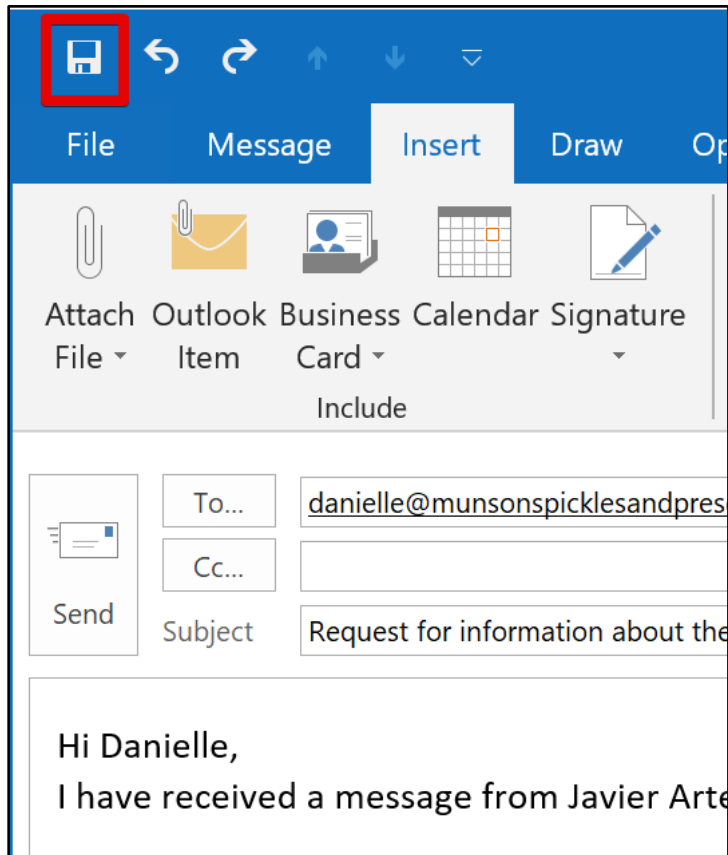
*Figure 22: A part of the **Message** window with the **Save** icon highlighted*

Additional information

For additional information on saving a draft, go to: <u>Save or delete drafts of unsent messages</u>

Activity: Each one, teach one

In this activity, you'll review documentation. Then you'll share what you learned with another student.

Resources required

You'll need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Read the article that the teacher assigned to you.

2. Share two or three things that you learned with the group.

Try-it: Add content to an email message

In this leveled try-it activity, you'll work on adding pictures and hyperlinks to an outgoing email message. You'll choose between adding an image and a hyperlink with the ribbon or by using keyboard shortcuts.

Try-it 1

In this try-it activity, you'll add an image and a hyperlink to a new message by using commands on the ribbon.

Resources

You'll need the following resource for this try-it:

- **Farmer_Danielle_Gousse_agricultural_technologist_illustration.png** in the **Media** folder.

Instructions

The following are the general tasks that you must perform during this try-it:

1. Use the ribbon to create a new email message.

2. Set the **Subject** line to **Our Agricultural Technologist**.

3. Set the **To** line to **marcos@munsonspicklesandpreservesfarm.com** or to your teacher's email address as directed.

4. Edit the body of the message to include the following text:

   Hi Marcos,

   The reporter who is doing a story on the Farm's no-till planting initiative requested a photograph of Danielle to run with a short description of her involvement in the process. Should we use this photograph from last year?

5. Use the ribbon to add **Farmer_Danielle_Gousse_agricultural_technologist_illustration.png** to the body of the message after the paragraph that you added in the previous step.

6. After the photograph, add the following text:
   For the description of Danielle's work, I'm going to direct them to the Farm's home page.

7. Using the ribbon, edit the last four words of the sentence (**the Farm's home page**) to be a hyperlink to **http://www.munsonspicklesandpreservesfarm.com**.

8. Copy the **Our Agricultural Technologist** message to **M2_module_PST_starter_Firstname_Lastname**.

Try-it 2

In this try-it activity, you'll add an image and a hyperlink to a new message by using keyboard shortcuts.

Resources

You'll need the following resource for this try-it:

- **Farmer_Danielle_Gousse_agricultural_technologist_illustration.png** in the **Media** folder.

Instructions

The following are the general tasks that you must perform during this try-it:

1. Use the ribbon to create a new email message.

2. Set the **Subject** line to **Our Agricultural Technologist**.

3. Set the **To** line to **marcos@munsonspicklesandpreservesfarm.com** or to your teacher's email address as directed.

4. Edit the body of the message to include the following text:

   Hi Marcos,

   The reporter who is doing a story on the Farm's no-till planting initiative requested a photograph of Danielle to run with a short description of her involvement in the process. Should we use this photograph from last year?

5. Use the ribbon to add **Farmer_Danielle_Gousse_agricultural_technologist_illustration.png** to the body of the message after the paragraph that you added in the previous step.

6. After the photograph, add the following text:
   For the description of Danielle's work, I'm going to direct them to the Farm's home page.

7. Using the ribbon, edit the last four words of the sentence (**the Farm's home page**) to be a hyperlink to **http://www.munsonspicklesandpreservesfarm.com**.

8. Copy the **Our Agricultural Technologist** message to **M2_module_PST_starter_Firstname_Lastname**.

Wrap-up

Use these questions to check what you learned in this lesson:

1. Which of the following do you use to send a copy of a message to additional recipients without other recipients knowing?

   Select the correct option.

   a. **@mention**

   b. **Bcc**

   c. **Cc**

   d. **Forward**

   e. **To**

2. Which tab on the ribbon includes extensive features for changing the font and paragraph settings, in addition to applying a style?

   Select the correct option.

   a. **Message**

   b. **Insert**

   c. **Options**

   d. **Format Text**

   e. **Review**

3. An _____ gets a recipient's attention by highlighting their name in the message body.

   Fill in the blank space.

4. To confirm that a recipient opens a message, request a _____ prior to sending the message.

   Fill in the blank space.

Lesson 2: Corresponding via email

Overview

In this lesson, you'll learn how to print email messages, reply to a message, and forward a message to a new recipient. The activities, discussions, and demonstrations in this lesson will strengthen your learning and give you the opportunity to practice printing, replying to, and forwarding messages.

Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Commands that are related to printing an Outlook message are primarily located in the _____.

   Fill in the blank space.

2. Which of the following should you use to send a message to someone who isn't on the message's **To** or **Cc** lines?

   Select the correct option.

   a. **Reply**

   b. **Reply All**

   c. **Forward**

   d. **New Email**

3. Use _____ to send a response to all original recipients.

   Fill in the blank space.

4. Use _____ to send a response only to the original sender.

   Fill in the blank space.

Topic 1: Preview and print message content

Email has revolutionized the way the modern workplace communicates. In the past, correspondence often involved memos that people printed and distributed to each person who needed to read it. Just think of all the paper a typical office would use! Email has largely replaced the role of the memo, giving us an environmentally friendly and efficient way to ensure that everyone has the information they need for their jobs.

However, there are still times when it's helpful to print an email message. For example, you might be meeting in a setting without computer access, or you might want an easy way to make notes on the contents of a message. Even if you aren't printing a message on paper, you can use the print feature in Outlook to create a PDF version of a message, which people can open without using Outlook.
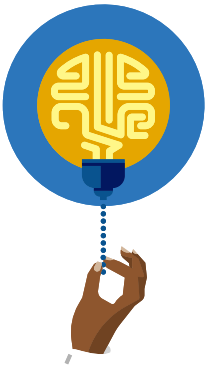
Did you know?

Many of the features that you use in email go back to the days of printed memos. For example, when you wanted to give a copy to someone who wasn't directly receiving the memo, you'd make a courtesy copy (cc).

To print a message in Outlook, select the message, select **File** to open the **Backstage** view, and then select **Print**. Outlook will display a preview in the details pane of the window that depicts exactly what will print. The following screenshot depicts the **Backstage** view with **Print** selected:
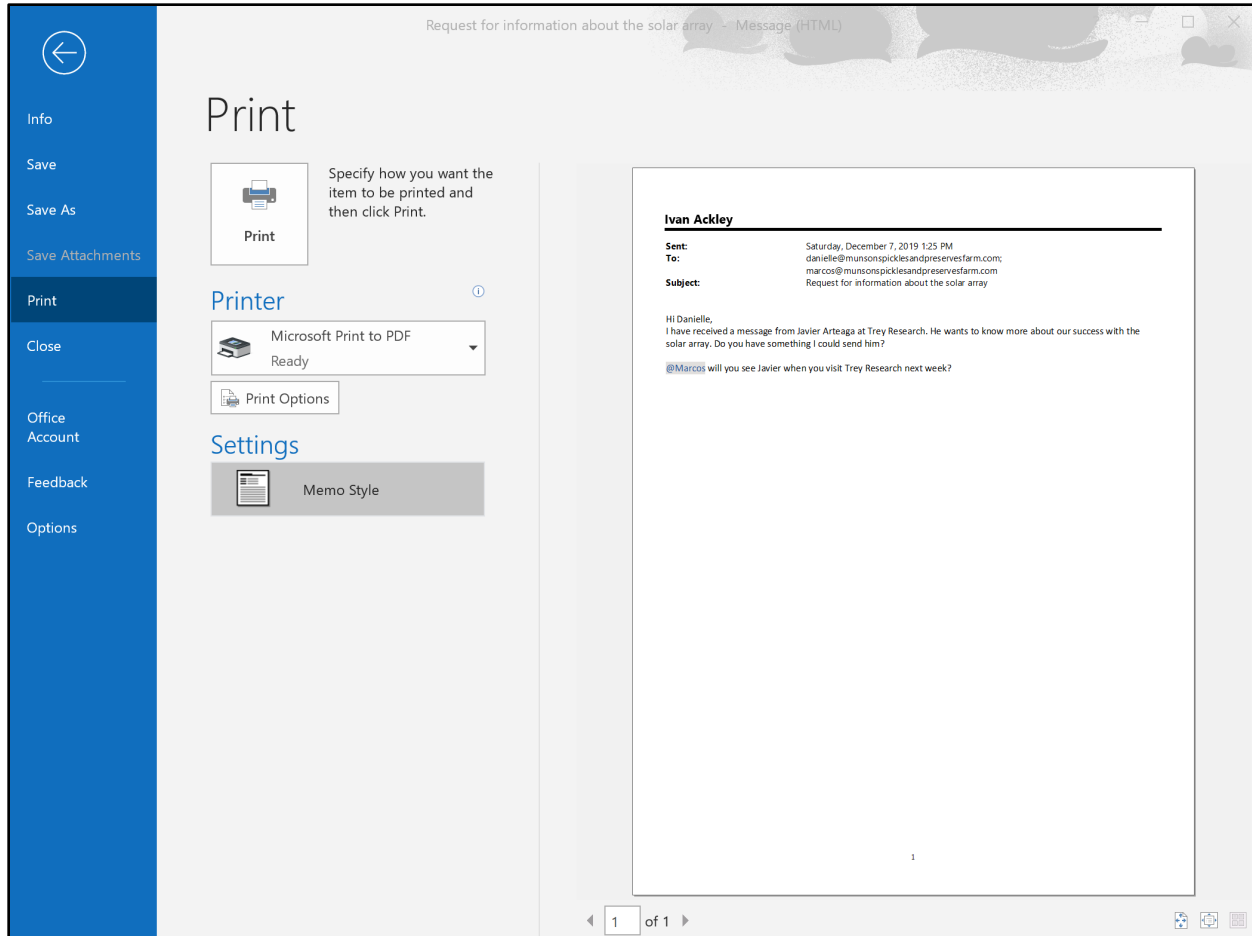
Microsoft

*Figure 23: The **Backstage** view with **Print** selected*

Use the **Printer** drop-down list to select your printer or select **Microsoft Print to PDF** to create a PDF file, and then select **Print** to send your message to the printer. If you selected **Microsoft Print to PDF**, you'll receive a prompt for a save location and file name.

Before you print, you can choose which page or pages to print. Select **File** to open the **Backstage** view, select **Print**, and then select **Print Options**. The following screenshot depicts a part of the **Backstage** view with **Print Options** highlighted:
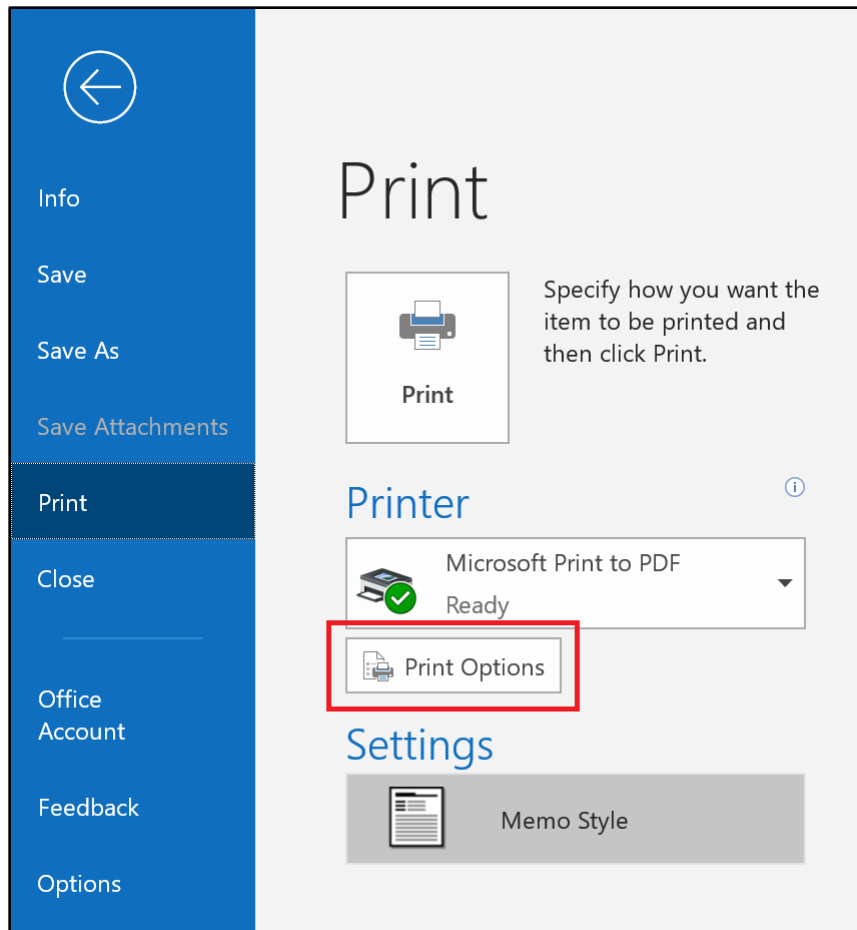
*Figure 24: A part of the **Backstage** view with **Print Options** highlighted*

This opens the **Print** dialog box. Select the **Pages** text box, and then enter the pages that you want to print. You can specify multiple pages by using commas, or you can specify a range of pages by using a hyphen. The following screenshot depicts the **Print** dialog box with **Pages** highlighted, and the settings are configured to print only page 1 and page 5:
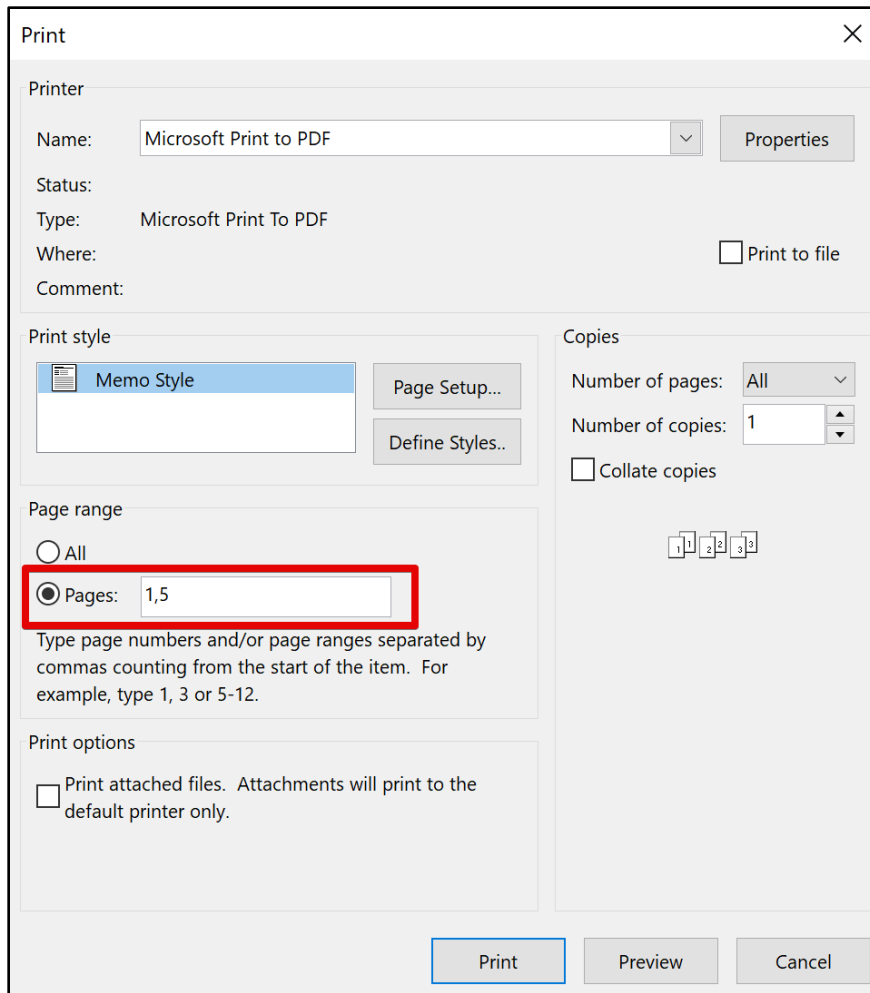
*Figure 25: The **Print** dialog box with **Pages** highlighted*

Additional information

For more information on printing messages, go to: Print a page or part of an email message

Activity: Show and tell

In this activity, your teacher or a fellow student will demonstrate how to preview and print an email message in Outlook.

Resources required

You'll need the following resources for this activity:

- None

Microsoft

39

Activity instructions

Participate in the activity by following these instructions:

1. Observe the demonstration of print preview, print settings, and **Microsoft Print to PDF**.

2. Ask the teacher clarifying questions. An example is: How can you print a range of pages of a message?

3. Participate in the discussion.

Try-it: Preview and print message content

In this single-level try-it activity, you'll review the content of a message in the print preview. You'll then print the message to a PDF.

Resources

You'll need the following resource for this try-it:

- The message with the subject line **Staff profiles**.

Instructions

The following are the general tasks that you must perform during this try-it:

1. In the **Inbox**, select the message with the subject line **Staff profiles**.

2. Use the **Backstage** view to preview how the message will print.

3. Configure the settings to print pages **1** and **2**.

4. Print the pages by using **Microsoft Print to PDF**.

5. Save the PDF in your student folder with the file name **M2_L2_try_staff_profiles.pdf**.

Topic 2: Reply to or forward an email message

Email works well for distributing information for people to read, but its real power is facilitating two-way communication. You might receive some email that you simply read and either delete or save for later. In many cases, however, you'll want to respond to a message or share it with others. You have several options to respond to a message in Outlook.

Use **Reply** to send a message only to the sender. If you want to reply to the sender and all the recipients of the message, use **Reply All**, which will include every recipient on the **To** and **Cc** lines of the message. Finally, use **Forward** to send the message to someone who isn't on the **To** or **Cc** lines of the message.

You can find the **Reply**, **Reply All**, and **Forward** commands on the **Home** tab in the **Respond** group. The following screenshot depicts the **Respond** group on the ribbon's **Home** tab:
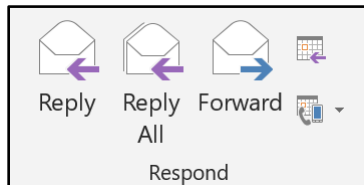
*Figure 26: The **Respond** group on the ribbon's **Home** tab*

After you select **Reply**, **Reply All**, or **Forward**, you'll be able to compose your new message. If the reply or forwarded message opens in the **Reading Pane**, select **Pop Out** to open the new message in the **Message** window, which offers more features for composing a message. The following screenshot depicts the **Reading Pane** with **Pop Out** highlighted:
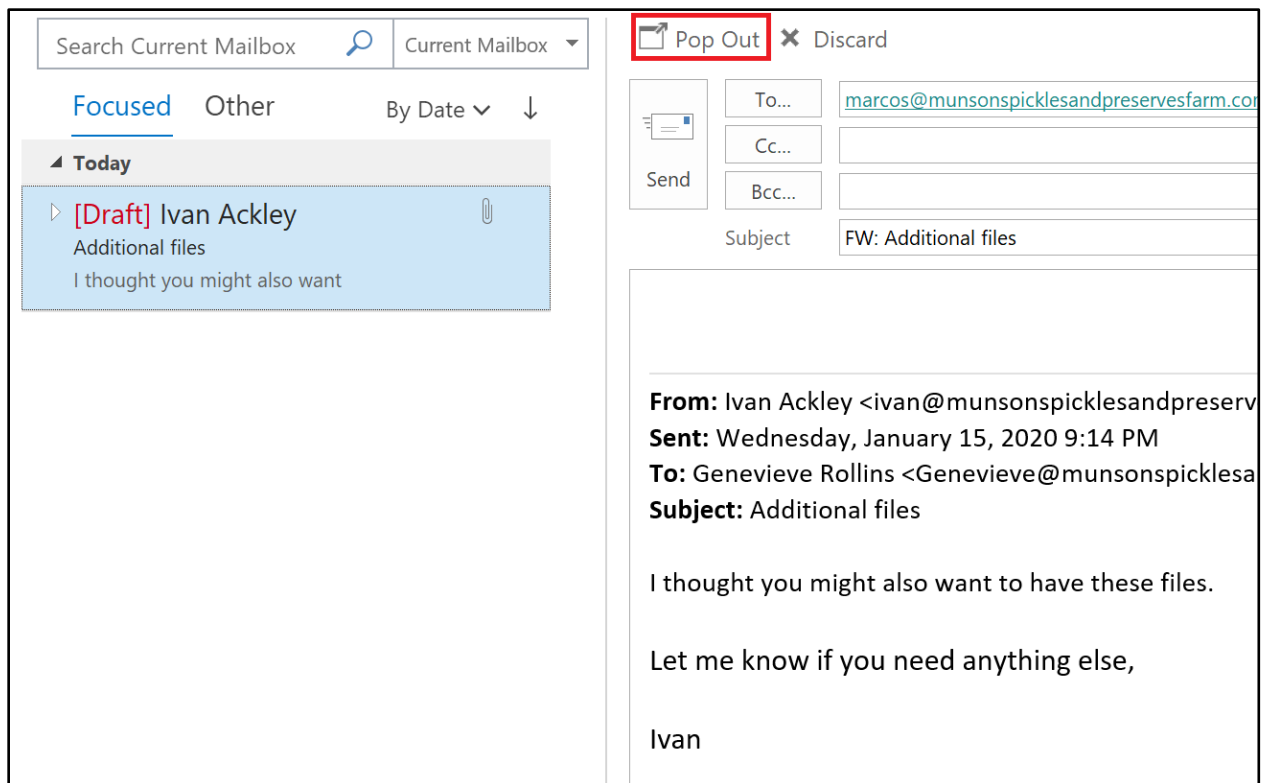
*Figure 27: The **Reading Pane** with **Pop Out** highlighted*

Microsoft

To add or remove recipients, select and edit the **To** text box and **Cc** text box. By default, Outlook will add "RE:" to the front of the subject line for a reply and "FW:" to the beginning of the subject line for a forwarded message. To change the subject line, select and edit the **Subject** text box.

Outlook will add the original message in the lower part of the message body, leaving a little space for you to add your own content. Outlook doesn't include attachments when you use **Reply** or **Reply All**, because it's assumed that the recipients would have received the attachments in the original message. If you select **Forward**, attachments are included because you'll be sending the message to people who didn't receive the original message. After finishing your reply or forward, select **Send**.
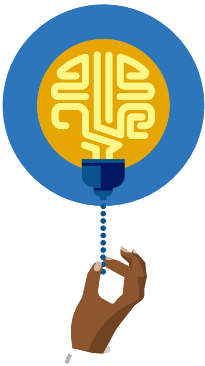
Did you know?

To access these commands with the keyboard, use these shortcuts:

- Ctrl+R to **Reply**.
- Ctrl+Shift+R to **Reply All**.
- Ctrl+F to **Forward**.

Additional information

For more information on replying to or forwarding email, go to: Reply to or forward an email message

Activity: Discuss and learn

In this activity, the group will discuss ways to respond to messages that have been sent to multiple people.

Resources required

You'll need the following resources for this activity:

- None

Activity instructions

Participate in the discussion that your teacher prompts.

Try-it: Reply to or forward an email message

In this leveled try-it activity, you'll practice replying to an email message. You'll either reply by using the ribbon or by using a keyboard shortcut.

Try-it 1

In this try-it activity, you'll respond to an email message by using the ribbon.

Resources

You'll need the following resource for this try-it:

- The message with the subject line **Staff profiles**.

Instructions

The following are the general tasks that you must perform during this try-it:

1. In the **Inbox**, select the message with the subject line **Staff profiles**.

2. Use the ribbon to access the **Reply** command.

3. In the message body, add the following text before the quoted message:

   Hi Genevieve,

   Thank you for sending these staff profiles. Does our webpage about the no-till planting initiative mention the individuals involved in the project? I'd like to refer the reporter to that page so they can gather additional information.

4. Copy the **Staff profiles** message to **M2_module_PST_starter_Firstname_Lastname**.

Try-it 2

In this try-it activity, you'll forward an email message by using the keyboard shortcut.

Resources

You'll need the following resource for this try-it:

- The message with the subject line **Staff profiles**.

Instructions

The following are the general tasks that you must perform during this try-it:

1. In the **Inbox**, select the message with the subject line **Staff profiles**.

2. Use the keyboard shortcut to access the **Forward** command.

3. Set the **To** line to **eugenia@munsonspicklesandpreservesfarm.com** or to your teacher's email address as directed.

4. In the message body, add the following text before the quoted message:

   Hi Eugenia,

   Genevieve sent me these great staff profiles to share with the reporter who is doing the feature on our no-till planting initiative. Is it okay to send these all to the reporter, or should I remove profiles of staff who aren't directly involved in the initiative?

5. Copy the **Staff profiles** message to **M2_module_PST_starter_Firstname_Lastname**.

Wrap-up

Use these questions to check what you learned in this lesson:

1. Where can you find a preview before you print a message?

   Select the correct option.

   a. **Print** in the **Backstage** view

   b. The **Print** dialog box

   c. The **View** tab

2. Which of the following can you specify when printing a message?

   Select all that apply.

   a. A single page to print

   b. Multiple pages to print

   c. A range of pages to print

   d. Print all pages

3. Select _____ to specify which pages you want to print.

   Fill in the blank space.

4. If a reply or forwarded message opens in the **Reading Pane**, use _____ to open the message in the **Message** window.

   Fill in the blank space.

Lesson 3: Working with message attachments

Overview

In this lesson, you'll learn how to preview, open, and save attachments to email messages that you receive. You'll also learn how to add and remove attachments with messages that you send. The activities, discussions, and demonstrations in this lesson will strengthen your learning and give you the opportunity to practice what you learn about email attachments.

Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. An _____ is a file that you send as part of a message.

   Fill in the blank space.

2. Which of the following will not automatically include attachments from the original message?

   Select all that apply.

   a. **Forward**

   b. **Reply**

   c. **Reply All**

3. Which feature can you use to review an email attachment without opening a separate app?

   Select the correct option.

   a. **Open**

   b. **Preview**

   c. **Save**

   d. **Save As**

Topic 1: Preview, open, and save message attachments

Attachments have become a popular way to distribute a variety of files, such as images, Office documents, and PDF documents. In the modern workplace, you're likely to receive many email attachments, so knowing how to open, review, and save them is critical. An email message that includes one or more attachments will have a paper clip icon in the message list.

Outlook also makes it possible to save an email message itself. This is useful when you must have a copy of a message that you have received or when you want to save a copy of an email that you plan to send.

Preview an email attachment

When receiving a message with an attachment, you might want to review it without saving the file or opening a different app. If you're using the **Reading Pane**, select the attachment to preview its contents. The following screenshot depicts a message in the **Reading Pane** with the attachment highlighted:
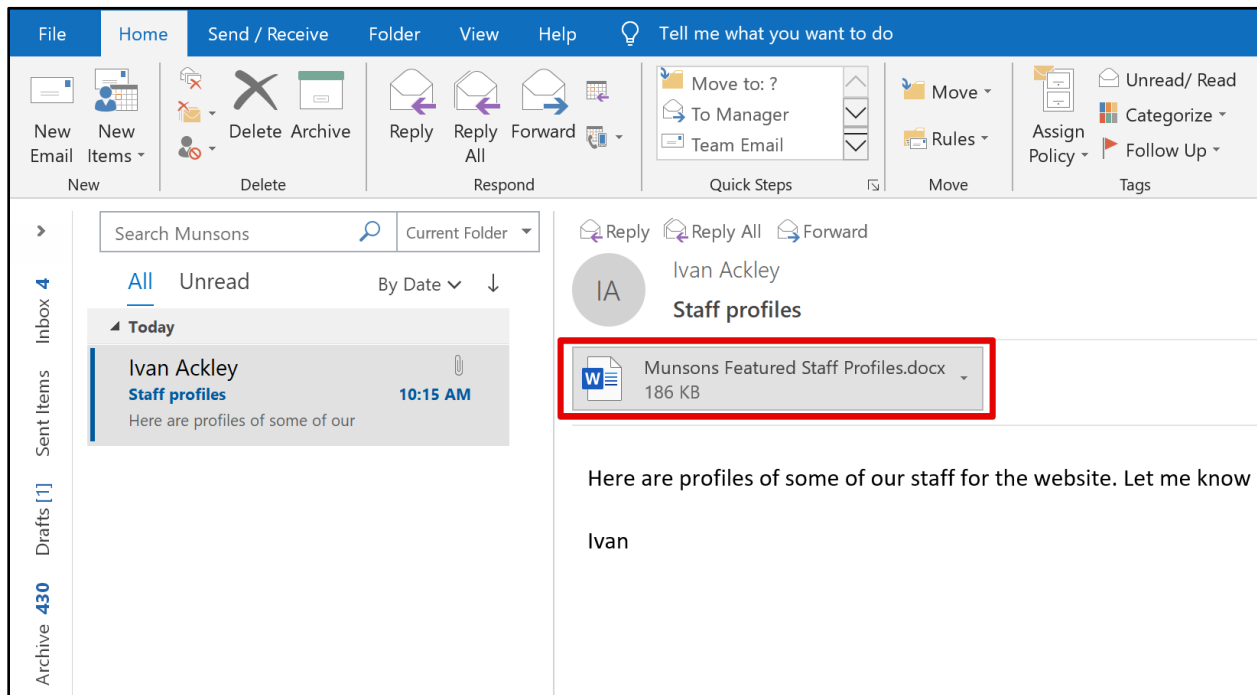
*Figure 28: A message in the **Reading Pane** with the attachment highlighted*

Microsoft

To return to the message, select **Back to message** within the preview, or you can select the **Attachments** tab, and then select **Show Message** in the **Message** group. The following screenshot depicts the **Reading Pane** while previewing an attachment with **Back to message** and **Show Message** highlighted:
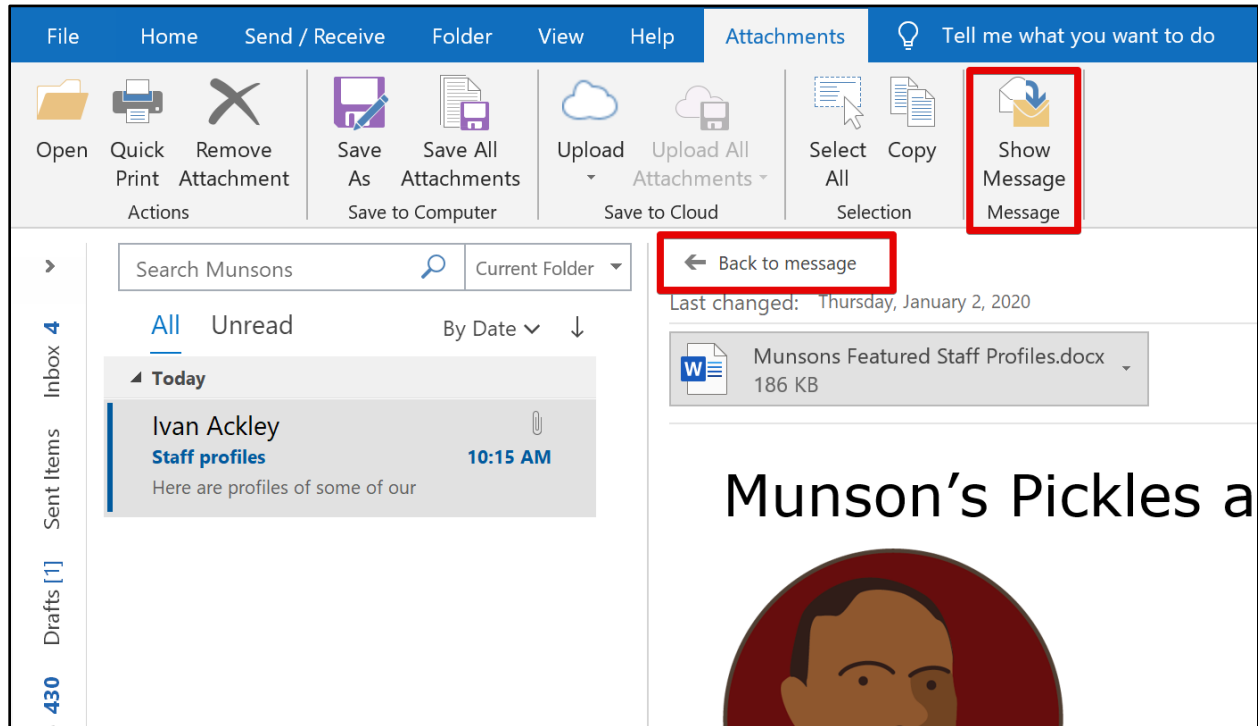
*Figure 29: The **Reading Pane** while previewing an attachment with **Back to message** and **Show Message** highlighted*

Note: This preview feature will only work if you have the same version of Word, Microsoft PowerPoint, Microsoft Excel, and Outlook.

Additional information

For more information on previewing message attachments, go to:
[Preview attachments in Outlook](#)

Open or save an email attachment

If you want to open an attachment in a different app, such as Word, double-click the attachment or select the drop-down arrow next to the attachment to open the attachment menu, and then select **Open**. The following screenshot depicts the attachment menu with **Open** highlighted:
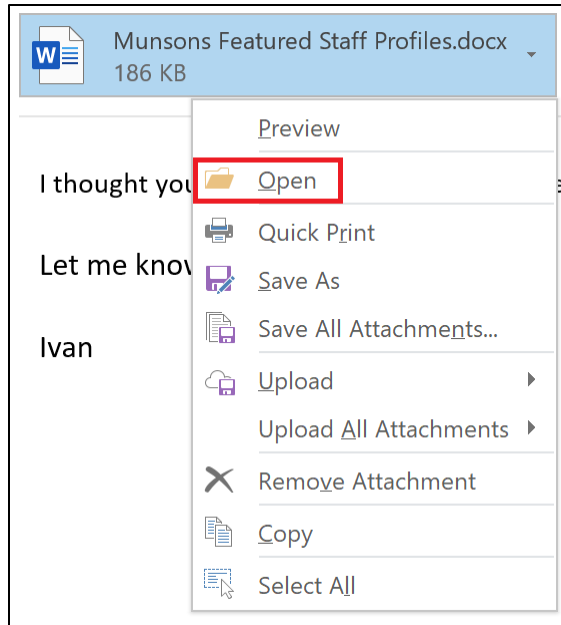
*Figure 30: The attachment menu with **Open** highlighted*

You can also save attachments so that you have copies of those attachments on your computer, which you can then open to review or edit. Any changes that you make will only affect your saved copy of the file and won't affect the attachment itself.

Select the drop-down arrow next to the attachment to open the attachment menu. To save only the current attachment, select **Save As**, and then choose a location in the **Save As** dialog box. To save all attachments from the current message, select **Save All Attachments**. The following screenshot depicts the attachment menu with **Save As** and **Save All Attachments** highlighted:
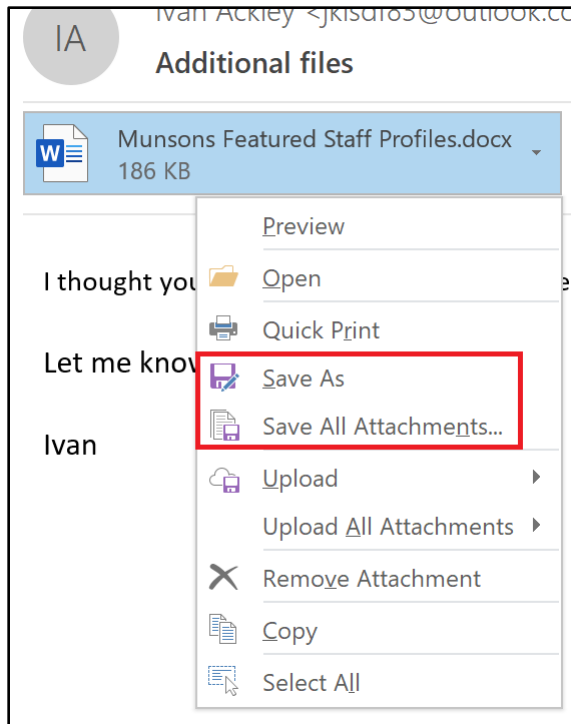
*Figure 31: The attachment menu with **Save As** and **Save All Attachments** highlighted*

If you select the **Save All Attachments** option, the **Save All Attachments** dialog box opens. By default, all attachments in a message are selected, but you can cancel the selection for any files you don't want to save. The following screenshot depicts the **Save All Attachments** dialog box:

Microsoft
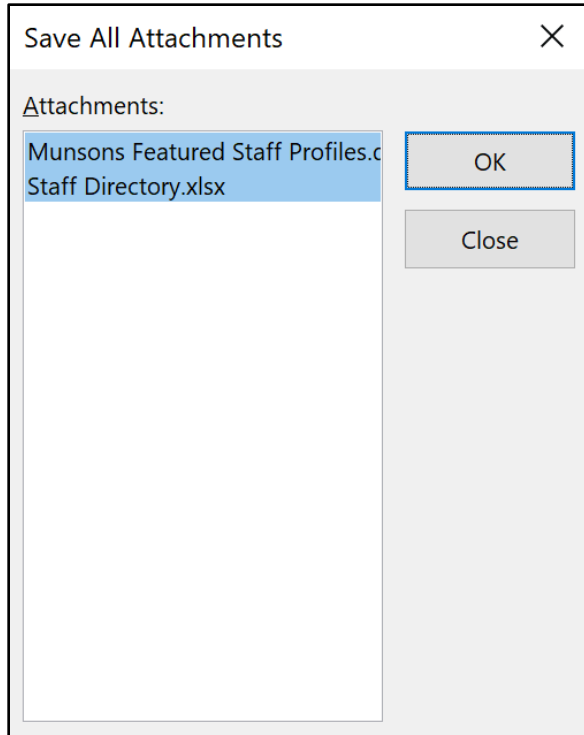
*Figure 32: The **Save All Attachments** dialog box*
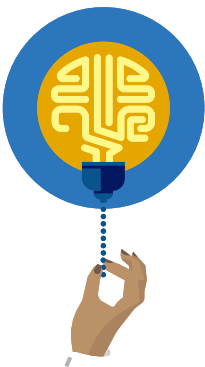
Did you know?

You can also save an attachment by dragging the attachment from the message to your desktop or another location in File Explorer.

Additional information

For more information on opening message attachments, go to: Open or save attachments

Save an email message as a file

As you compose an email, Outlook automatically saves a copy in your **Drafts** folder until you send it. You can also save a message to a file, whether it's a draft, a sent message, or a message that you received.

To save a message, you must first select it in the **Mail Pane**. You can also double-click the message or select it, and then select Enter to open it in the **Message** window. Select **File** on the ribbon, and then select **Save As** in the **Backstage** view to open the **Save As** dialog box. In the **Folder Pane**, navigate to the location where you want to save the file. The file name will default to the subject line of the email, but you can change it by selecting the **File name** box and editing the text. The following screenshot depicts the **Save As** dialog box in Outlook:
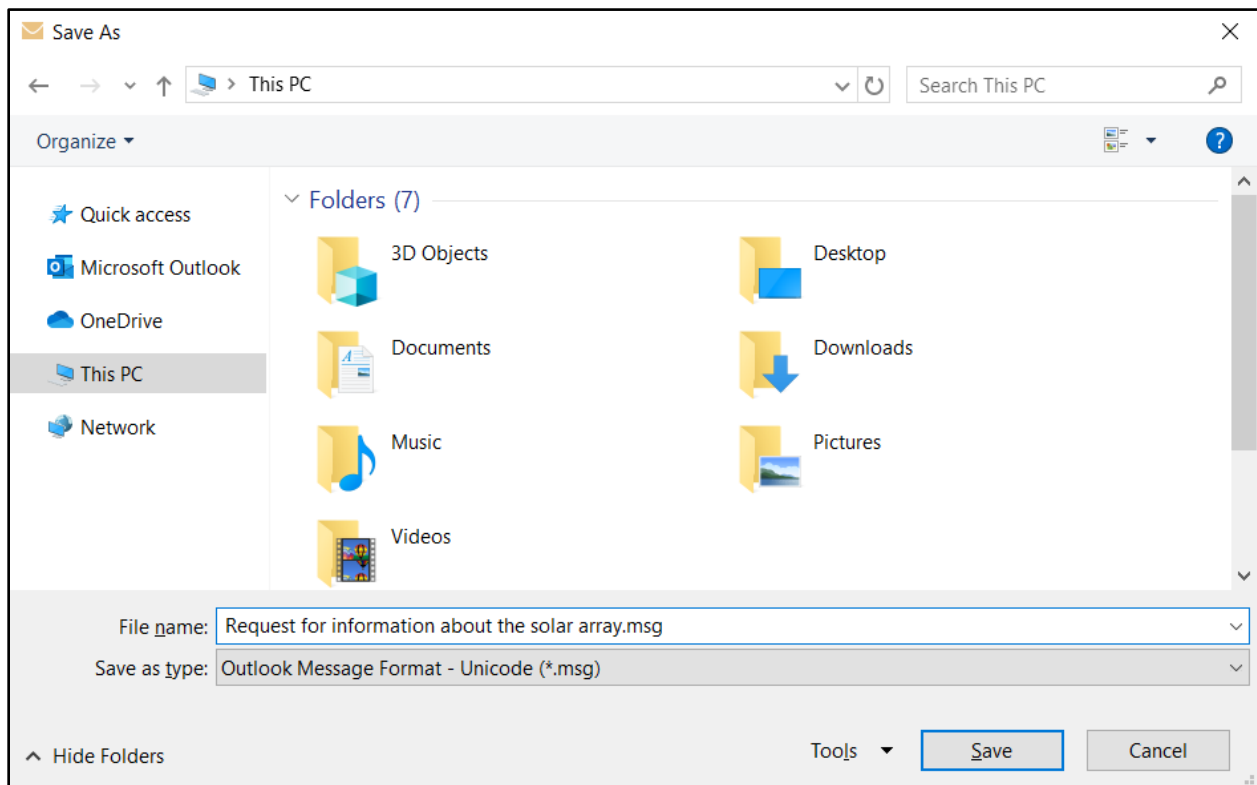
*Figure 33: The **Save As** dialog box in Outlook*
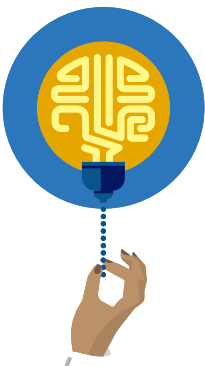
Did you know?

You can save a message in a different format by changing the **Save as type** in the **Save As** dialog box. If you save a message as an HTML file, you can open it Word.

Additional information

For more information on saving an email as a file, go to: [Save a message as a file](#)

Activity: Pose a challenge

In this activity, you'll explore the ways to handle attachments in an incoming email.

Resources required

You'll need the following resource for this activity:

- Locate the message with the subject line **Staff images**.

Activity instructions

Participate in the activity by following these instructions:

1. In the **Inbox**, select the message with the subject line **Staff images**.

2. Try different ways to preview, open, and save the two message attachments.

3. As directed by the teacher, share the techniques that you used with the group.

Try-it: Preview, open, and save message attachments

In this leveled try-it activity, you'll practice different approaches to handling files that are attached to incoming messages. You'll preview an attachment in Outlook or save an attachment to your computer for offline review.

Try-it 1

In this try-it activity, you'll preview an attachment in Outlook.

Resources

You'll need the following resource for this try-it:

- The message with the subject line **No-till blueberries**.

Instructions

The following are the general tasks that you must perform during this try-it:

1. In the **Inbox**, select the message with the subject line **No-till blueberries**.

2. Preview the contents of the PDF attachment.

3. Copy the **No-till blueberries** message to
    M2_module_PST_starter_Firstname_Lastname.

Try-it 2

In this try-it, you'll save a message attachment so that you can review it offline and outside of Outlook.

Resources

You'll need the following resource for this try-it:

*   The message with the subject line **No-till blueberries**.

Instructions

The following are the general tasks that you must perform during this try-it:

1. In the **Inbox**, select the message with the subject line **No-till blueberries**.

2. Save the PDF attachment to your student folder.

3. Copy the **No-till blueberries** message to
    M2_module_PST_starter_Firstname_Lastname.

Topic 2: Add and remove message attachments

When you want to send a file by email, you can include it as an attachment. The process is the same whether it's a new message, a reply, or a forwarded message. Select **New Email** to open a new message in the **Message** window. Select the **Message** tab, and then select **Attach File** in the **Include** group. Outlook will display a list of recent items and options to attach a file from the web or from a location on your device. Select **Browse This PC** and choose the file that you want to attach. To attach multiple files, simply repeat the steps for each additional file. The following screenshot depicts the **Attach File** options:
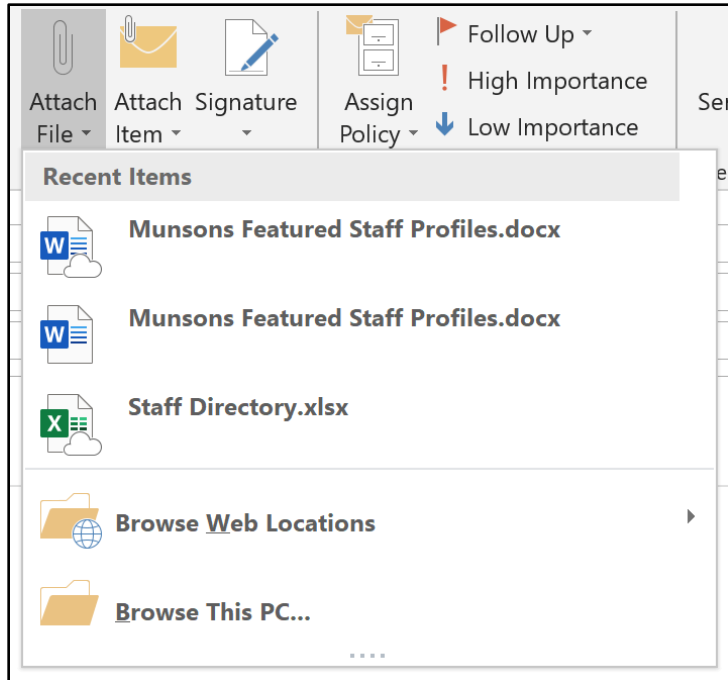
*Figure 34: The **Attach File** options*

Before you send the message, you can also remove an attachment. Select the drop-down arrow for the attachment that you want to remove. On the menu that appears, select **Remove Attachment**. The following screenshot depicts the attachment menu with **Remove Attachment** highlighted:
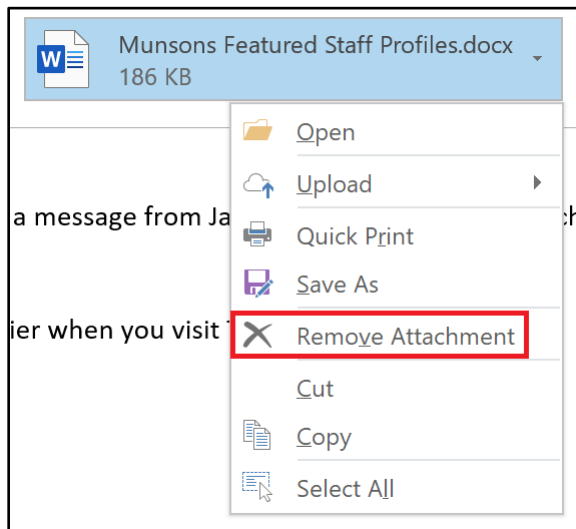
*Figure 35: The attachment menu with **Remove Attachment** highlighted*

Microsoft
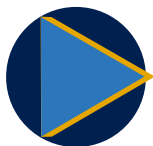
Video

To review the video on adding and removing email attachments, go to: [Sending and receiving attachments](#)

Activity: Guess and tell

In this activity, you'll discuss limitations on message attachments.

Resources required

You'll need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. As directed by the teacher, guess what kinds of files can and can't be sent as email attachments. How do you think those limitations are determined?

2. Share your guesses with the group.

Try-it: Add and remove message attachments

In this leveled try-it activity, you'll practice working with attachments to a message that you're preparing to send. You'll add an attachment to the message or remove an attachment from it.

Try-it 1

In this try-it, you'll add an attachment to an email message that already includes a couple of attachments.

Resources

You'll need the following resources for this try-it:

- The message with the subject line **Information for the media**.
- **Farmer_Danielle_Gousse_agricultural_technologist_illustration.png** in the **Media** folder.

Microsoft

Instructions

The following are the general tasks that you must perform during this try-it:

1. In the **Drafts** folder, select the message with the subject line **Information for the media**.

2. Add the **Farmer_Danielle_Gousse_agricultural_technologist_illustration.png** file as an attachment.

3. Copy the **Information for the media** message to **M2_module_PST_starter_Firstname_Lastname**.

Try-it 2

In this try-it, you'll remove an attachment from an email message that already includes a couple of attachments.

Resources

You'll need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you must perform during this try-it:

1. In the **Drafts** folder, select the message with the subject line **Information for the media**.

2. Remove the **Staff_profiles.pdf** attachment.

3. Copy the **Information for the media** message to **M2_module_PST_starter_Firstname_Lastname**.

Detach the module .pst file

After you complete all try-its, you must detach your .pst file so your teacher can assess your work. To do this:

1. In Outlook, on the **Navigation Bar**, select the ellipsis (**Navigation Menu** button), and then select **Folders**.

2. Locate the folder called **M2_module_PST_starter_Firstname_Lastname**, and right-click or access the context menu for the folder.

3. On the context menu, select **Close** "**M2_module_PST_starter_Firstname_Lastname**".

4. On your computer, open **File Explorer**, and then go to the path where the .pst file resides.

5. Right-click or access the context menu for the file, and then select **Rename**.

6. Append your name to the end of the existing file name by using underscores instead of spaces. For example, enter **_Firstname_Lastname**. The filename should now resemble **M2_module_PST_starter_Firstname_Lastname**.

7. Copy the .pst file to the designated location for assessment.

Wrap-up

Use these questions to check what you learned in this lesson:

1. How can you preview an email attachment?

   Select the correct option.

   a. Select the attachment

   b. Double-click the attachment, or select it and then select Enter

   c. Use the **View** tab on the ribbon

2. Which of the following is true of an attachment that you receive in a message?

   Select the correct option.

   a. Changes that you make to the file will affect all recipients' copies of the file

   b. Changes that you make to the file will affect the sender's copy of the file

   c. Changes that you make to the file won't affect any other copies

3. When previewing an attachment, which command returns you to the body text of the message?

   Select all that apply.

   a. **Exit**

   b. **Back to message**

   c. **Remove Attachment**

   d. **Show Message**

4. When previewing an attachment, use _____ to return to the message body.

   Fill in the blank space.

5. Use _____ to save a copy of a message to a file.

    Fill in the blank space.

Glossary

@mention	A tag in the text of an email message that helps get the attention of an individual recipient.
Attachment	A file included with an email message.
Blind courtesy copy	A copy of an email message sent to a recipient not on the **To** or **Cc** lines. Other recipients won't receive the name or email address of any blind copy recipient.
Draft	An email message that hasn't yet been sent. Outlook automatically saves these in the **Drafts** folder.
Follow Up flag	A visual indicator that you must remember a response or task related to a message.
Forward	A copy of a message sent to an individual who didn't originally receive it.
read receipt	A feature used to confirm that a sent message has been opened by a recipient.
Reply	A response sent only to the sender of a message.
Reply All	A response sent to all recipients on a message's **To** and **Cc** lines.

Table 2: Glossary terms and definitions

Cornerstone

Overview

In this Cornerstone, you'll manage communications that are related to the Farm's no-till planting initiative and use of cover crops to prevent soil erosion. You'll create, respond to, and forward email messages. You'll also manage attachments for both incoming and outgoing messages, and you'll format the content of messages that you're composing.

Objectives

The following table outlines the Cornerstone objectives and their corresponding Microsoft Office Specialist (MOS) exam objectives.

Cornerstone project objective	MOS exam objectives
Compose emails, add content, and format the content in emails.	• 2.1.2: Designate recipients by using courtesy copy (CC) and blind courtesy copy (BCC) • 2.1.3: Use @mention to get someone's attention • 2.1.5: Flag outgoing messages for follow-up • 2.1.6: Set the importance and sensitivity of outgoing messages • 2.2.1: Insert hyperlinks • 2.2.2: Insert images
Reply to and forward email messages.	• 1.4.2: Save message attachments • 2.1.4: Forward and reply to messages
Add attachments to outgoing messages and manage attachments to incoming messages.	• 1.4.4: Save messages in alternative formats • 2.1.1: Add or remove message attachments

Table 3: Cornerstone objectives

Duration

50 minutes

Microsoft

Attach the Cornerstone .pst file

To complete this Cornerstone, you must attach this .pst file into Outlook before you can perform any tasks. You'll also store the results of your tasks in this .pst file so that your teacher can assess your working by examining that file.

To open the .pst file in Outlook:

1. Open Outlook.

2. Select the **File** tab, and then select **Open & Export**.

3. In the **Open** pane, select **Open Outlook Data File**.

4. In the **Open Outlook Data File** dialog box, use the navigation pane to locate the .pst files provided by your instructor for your use throughout this module of the course.

5. Open the file named **M2_cornerstone_PST_starter**. Note that a folder **M2_cornerstone_PST_starter** is now available in the navigation pane. This folder contains any required starter elements for the Cornerstone, such as emails, calendar appointments, tasks, and contacts.

6. Right-click or access the context menu for the **M2_cornerstone_PST_starter** folder, and then select **Properties**.

7. In the **M2_cornerstone_PST_starter Properties** dialog box, select **Advanced**.

8. In the **Outlook Data File** dialog box, in the **Name** box, append your name to the end of the existing name by using underscores instead of spaces. For example, enter _Firstname_Lastname. The folder name should now resemble **M2_cornerstone_PST_starter_Firstname_Lastname**.

9. Select **OK** twice.

Copy content into the Cornerstone .pst file

As you proceed through this Cornerstone's tasks, you should copy the resulting elements, such as emails, calendar appointments, tasks, and contacts, to the **M2_cornerstone_PST_starter_Firstname_Lastname** folder by using the following instructions:

1. After you attach the .pst file, you should be able to observe duplicate folders for items such as emails, calendar appointments, tasks, and contacts.

2. After you complete a try-it exercise, select your resulting items in the navigation pane. Make sure you select the items that are associated with your email account.

3. In the details pane, right-click or access the context menu for each item, and then, select **Copy** or select Ctrl+C.

4. Select the **M2_cornerstone_PST_starter_Firstname_Lastname** folder.

5. Select Ctrl+V to copy the item to the .pst file.

6. Repeat steps 3 through 5 for any additional items that you want to copy.

Instructions

1. Complete the following tasks for each file.

2. When you finish the Cornerstone, assess your completion, and then enter the points you think you earned within the following task lists. You can get your teacher's help if necessary.

Tasks

In addition to **M2_cornerstone_PST_starter.pst**, you'll also need **Munsons_logo_banner_large_illustration.png** from the **Media** folder under **Student Materials**.

The following sections describe the tasks you'll need to do for this Cornerstone.

File 1: M2_cornerstone_PST_starter.pst

Task: Compose email, add content, and format the content in emails (6 points)

1. Create a new email message to **marcos@munsonspicklesandpreserves.com** with the subject line set to **When do we plant the cover crops?** Use the **Cc** line to include **danielle@munsonspicklesandpreserves.com** and **eugenia@munsonspicklesandpreserves.com**. The body of the message should read:

   Hi Marcos,
   I'm putting together some information to share with the community about our use of cover crops to prevent erosion on the hillier parts of the farm. When will we plant our cover crops this year?

   (1 point) (Exam objective 2.1.2)

2. Add a flag to this new message reminding you to follow up next week. (1 point) (Exam objective 2.1.5)

3. Set this new message to **Low Importance**, and then save a draft. (1 point) (Exam objective 2.1.6)

4. Find the draft message with the subject **Cover crops overview**. Style the following three lines of text as **Heading 1**: **Field 1**, **Field 4**, and **Field 7**. Add an **@mention** for **eugenia@munsonspicklesandpreservesfarm.com** before the line that reads **For your review**. (1 point) (Exam objective 2.1.3)

5. Insert the **Munsons_logo_banner_large_illustration.png** picture from the **Media** folder in the message body after the line of text that reads **Learn more about the Farm**. (1 point) (Exam objective 2.2.2)

6. Make the text in the message body that reads **Learn more about the Farm** into a hyperlink to **http://www.munsonspicklesandpreservesfarm.com**. Save a draft of this message. (1 point) (Exam objective 2.2.1)

Points scored: _____ /6

Task: Reply to and forward email messages (3 points)

1. In the **Inbox** folder, find the message with the subject line **Personnel working on the cover crops**. Save the **Pick_your_own.pdf** attachment to your student folder. (1 point) (Exam objective 1.4.2)

2. Forward the **Personnel working on the cover crops** message with **eugenia@munsonspicklesandpreservesfarm.com** as the recipient. Add the following text to the message body: **Here is the profile that we want to use. Can you please add a sentence or two about your interest in cover crops?** (1 point) (Exam objective 2.1.4)

3. In the **Inbox** folder, find the message with the subject **Cover crops planting timeline** Reply to all recipients, and then add the following to the beginning of the message body: **I've requested this information and will let everyone know when I receive it.** (1 point) (Exam objective 2.1.4)

Points scored: _____ / 3

Task: Add attachments to outgoing messages and manage attachments to incoming messages (3 points)

1. Create a new message to **ivan@munsonspicklesandpreserves.com** with the subject line **Proofreading request**. Attach **profile.docx** from the previous task, and then add the following text to the message body: **Can you please proofread this before we send it out?** (1 point) (Exam objective 2.1.1)

2. In the **Drafts** folder, find the message with the subject line **Files for review**. Remove the attachment named **profile.docx**. (1 point) (Exam objective 2.1.1)

3. Add **eugenia@munsonspicklesandpreservesfarm.com** to the **To** line.

4. Save the message as a file named **M2_cornerstone_draft.msg**. (1 point) (Exam objective 1.4.4)

Points scored: _____ / 3

TOTAL POINTS: _____ / 12

Microsoft

Detach the Cornerstone .pst file

After you complete all tasks, you must detach your .pst file so that your teacher can assess your work. To do this:

1. In Outlook, on the **Navigation Bar**, select the ellipsis (**Navigation Menu** button), and then select **Folders**.

2. Locate the folder called **M2_cornerstone_PST_starter_Firstname_Lastname**, and right-click or access the context menu for the folder.

3. On the context menu, select **Close "M2_cornerstone_PST_starter_Firstname_Lastname"**.

4. On your computer, open **File Explorer**, and go to the path where the .pst file resides.

5. Right-click or access the context menu for the file, and then select **Rename**.

6. Append your name to the end of the existing file name by using underscores instead of spaces. For example, enter **_Firstname_Lastname**. The filename should now resemble **M2_cornerstone_PST_starter_Firstname_Lastname**.

7. Copy the .pst file to the designated location for assessment.

Microsoft

Student Guide

40569A
Microsoft Outlook associate 2019

Module 3: Organizing email

Contents

Microsoft

Microsoft

Microsoft

Module overview

Description

Email is a vitally important communication tool in the modern workplace. With its prevalence in almost every aspect of your life, you might sometimes feel overwhelmed by all the email you receive. In this module, you'll learn how to use Microsoft Outlook 2019 to manage the messages in your Inbox. You'll learn about **Instant Search**, filters, and Search Folders to quickly find the messages you need. You'll also practice using folders, follow-up flags, and color categories to set up an organization system. And you'll learn how to delete and recover messages.

Lesson	Learning objective	Exam objective(s)
Viewing email	Observe mail messages with different views.	• 2.3.1 • 2.3.7
Managing conversations	Manage email conversations.	• 2.3.6 • 2.3.7
Tagging messages for action	Categorize and follow up on messages.	• 2.3.4 • 2.3.5
Searching and finding messages	Search for content with specific criteria and locations.	• 1.3.1 • 1.3.2 • 1.3.3
Organizing messages with folders	Organize messages by using folders.	• 2.3.2 • 2.3.3
Deleting and recovering messages	Remove and retrieve messages from mailbox folders.	None

Lesson	Learning objective	Exam objective(s)
Cornerstone: Managing festival communications	Manage, tag, find, move, and organize email messages.	• 1.3.1 • 1.3.2 • 2.3.1 • 2.3.2 • 2.3.3 • 2.3.4 • 2.3.5 • 2.3.6 • 2.3.7

Table 1: Objectives by lesson

Scenario

A highlight of the summer at Munson's Pickles and Preserves Farm is the Blueberries and Balloons Festival. The festival has been an annual attraction for many years. Thousands of people attend the festival and enjoy the fun family activities and good food.

As the Media and Communications intern, it's now your job to manage the festival communications. It's a big job! Your mailbox is filling up quickly and you don't want to miss urgent messages. It's time to get organized.

Cornerstone

This module concludes with a cornerstone, in which you'll manage communications for the Blueberries and Balloons Festival. In the cornerstone you will search, sort, filter, and delete messages. You will work with conversations and follow-up flags, in addition to folders and Search Folders.

Lesson 1: Viewing email

Overview

In this lesson, you'll learn how to customize how you observe messages by using sorts and filters. You'll change the way email is sorted in a folder, apply filters, and use the **Focused Inbox** to keep your most important messages separate. The activities, discussions, and demonstrations in this lesson will strengthen your learning and give you the opportunity to practice what you learn about observing email.

Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Which of the following features separates your **Inbox** into two separate tabs?

   Select the correct option.

   a. **Arrange By**

   b. **Filter**

   c. **Focused Inbox**

   d. **Sort**

2. Which command switches between ascending sort order and descending sort order?

   Select the correct option.

   a. **Invert Sort**

   b. **Change Sort**

   c. **Reverse Sort**

   d. **Unread/Read**

   e. **Filter**

3. What are the options for filtering a folder in Outlook?

   Select all that apply.

   a. **All Mail**

   b. **Read Mail**

   c. **Unread Mail**

   d. **Mentioned Mail**

   e. **Flagged Mail**

4. To sort alphabetically by the sender's name, arrange by the _____ field.

   Fill in the blank space.

5. On the _____ tab of the ribbon, you can find the commands for altering the way the message list is arranged and sorted.

   Fill in the blank space.

6. After you open a message, Outlook marks it as _____.

   Fill in the blank space.

Attach the module .pst file

To provide the most effective learning experience, this module includes several starter elements such as email, calendar appointments, tasks, and contacts. These elements are stored in an external Outlook Data File, or .pst file. It resides in a location that your teacher will provide. To complete this module, you must attach this .pst file into Outlook before you can perform any try-its. You'll also store the results of your try-its in this .pst file. This allows your teacher to assess your work by examining the .pst file's contents.

To open the .pst file in Outlook:

1. Open Outlook.

2. Select the **File** tab, and then select **Open & Export**.

3. In the **Open** pane, select **Open Outlook Data File**.

4. In the **Open Outlook Data File** dialog box, use the navigation pane to locate the .pst files provided by your instructor for your use throughout this module of the course.

5. Open the file named **M3_module_PST_starter**. Note that a folder **M3_module_PST_starter** is now available in the navigation pane. This folder contains any required starter elements for the module, such as email, calendar appointments, tasks, and contacts.

6. Right-click or access the context menu for the **M3_module_PST_starter** folder, and then select **Data File Properties**.

7. In the **M3_module_PST_starter Properties** dialog box, select **Advanced**.

8. In the **Outlook Data File** dialog box, in the **Name** box, append your name to the end of the existing name by using underscores instead of spaces. For example, enter _ *Firstname_Lastname*. The folder name should now resemble **M3_module_PST_starter_** *Firstname_Lastname*.

9. Select **OK** twice.

Topic 1: Sort and arrange email

 Email is a key part of the modern workplace, and it's important to know how to sort your messages in the order that's most helpful to you. If you want to read all the messages you received from one person, you could sort with **From**. If you need to find a message you received last week but you can't remember who sent it, you could sort with **By Date**.

Select an Arrange By field

To change the sort order of the current mailbox, select **Sort, Arrange, or Filter** drop-down menu in the **mail** pane, and then in the **Arrange by** section, select the sort field you want. The following screenshot depicts the **mail** pane with the **Sort, Arrange, or Filter** drop-down menu highlighted.
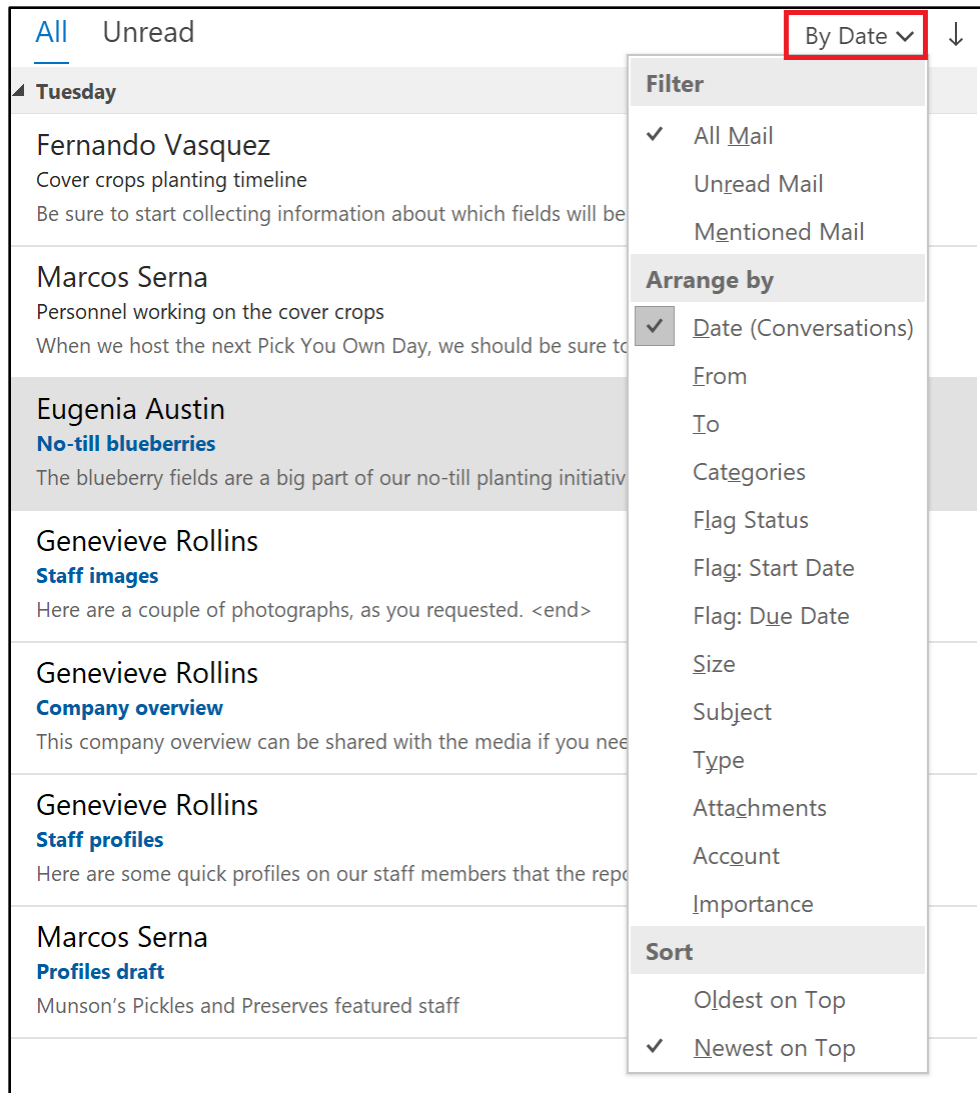
*Figure 1: The **mail** pane with the **Sort, Arrange, or Filter** drop-down menu highlighted*

You can also arrange the messages by using commands on the ribbon. Select the **View** tab, and then in the **Arrangement** group, select the **More** command, which is depicted as a down-arrow, to expand the **Arrangement** gallery. (For some users, the gallery might already display.) From here, you can select the option you want to sort by, as the following screenshot depicts.
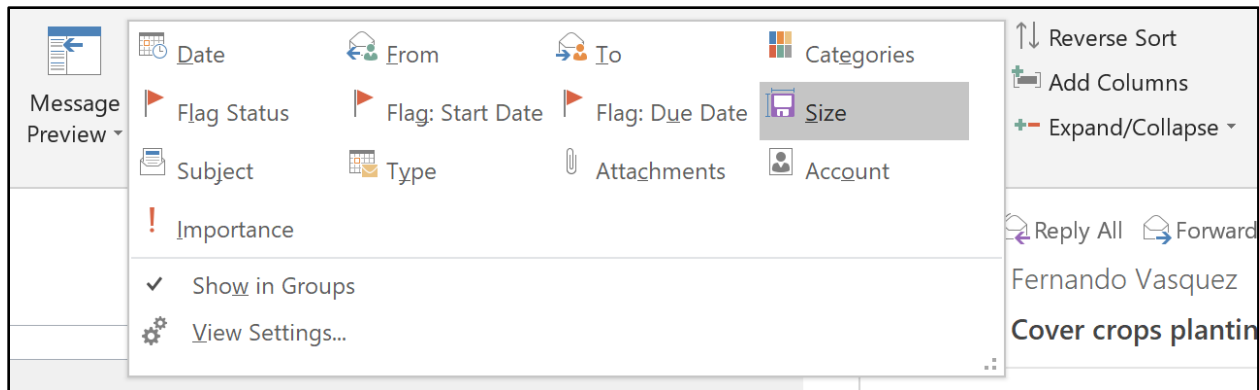
*Figure 2: The **Arrangement** gallery after selecting **More** to expand the options*

Finally, you can select an arrangement from the column headers in the **mail** pane. Right-click or access the context menu for the list heading, select **Arrange By**, and then select the field you want to use for arranging the messages. The following screenshot depicts the list heading context menu with **Arrange By** selected to activate the list of options.
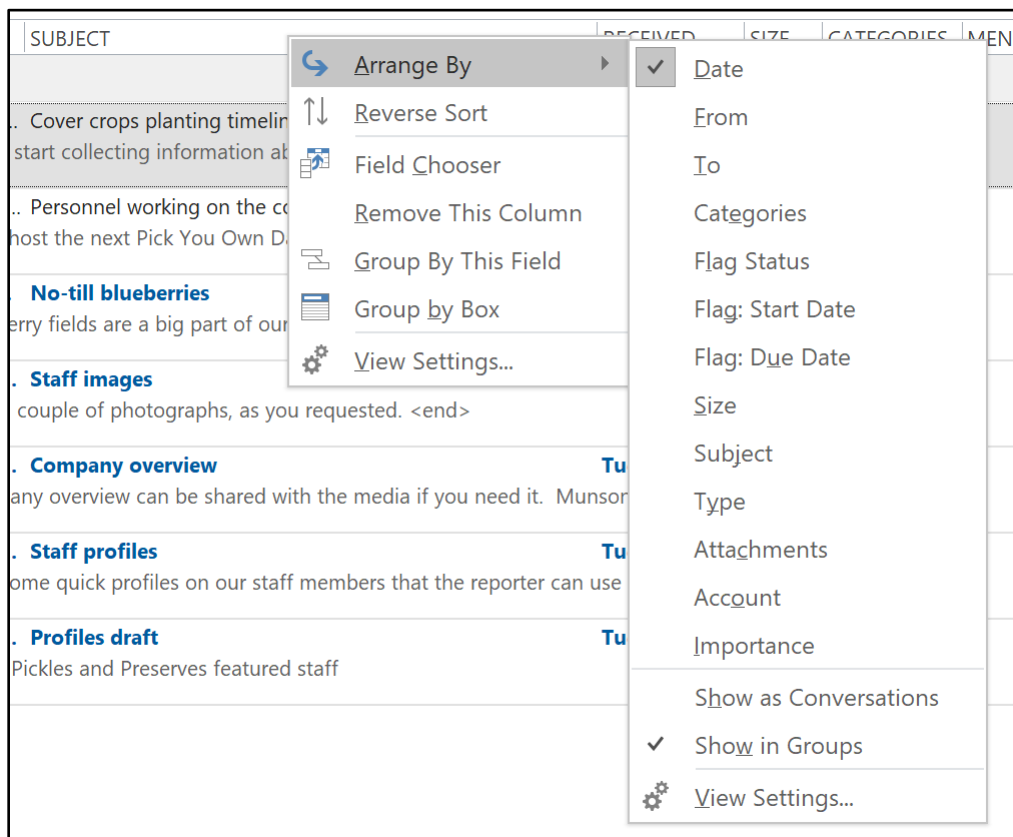
*Figure 3: The list heading context menu with **Arrange By** selected to activate the list of options*

Microsoft
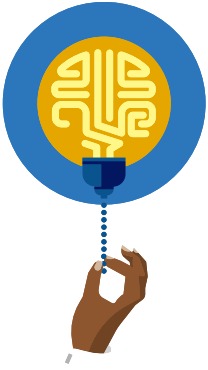
Did you know?

You can also set the **Arrange By** order by selecting the name of the field in the list headings of the **mail** pane.

Select a sort order

In addition to selecting the field you use to sort your messages, you can also choose to display the messages in ascending or descending order. For example, you can sort names from A to Z or from Z to A.

To toggle between ascending and descending order, select the **Sort Messages** command. You can also change the sort order by selecting **Sort, Arrange, or Filter** to open the drop-down menu of options, and then select the order you want in **Sort**. The **Sort** section will always include two options, but the text will change depending on the **Arrange by** option you have selected. For example, if you have selected **Date**, the choices will be **Oldest on Top** and **Newest on Top**, but if you select **From**, the options will be **A to Z** and **Z to A**. The following screenshot depicts the **Sort, Arrange, or Filter** drop-down menu, with the **Sort** options highlighted.
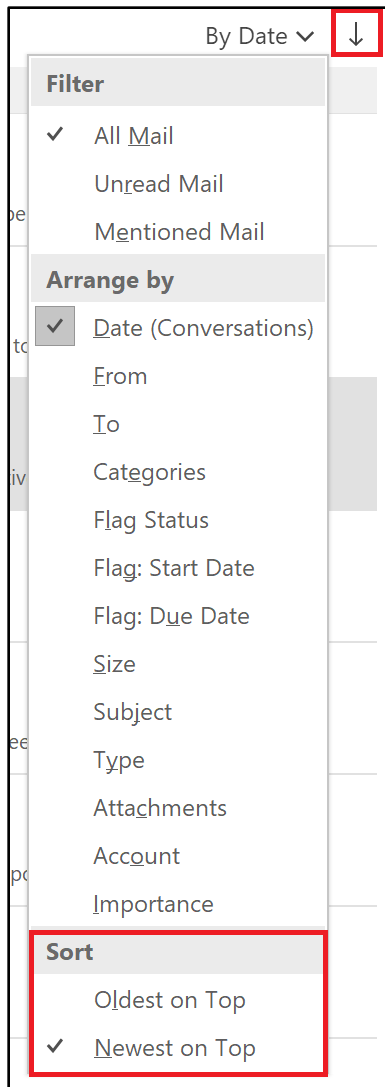
Figure 4: The *Sort, Arrange, or Filter* drop-down menu, with the *Sort* options highlighted

To change the sort order by using the ribbon, select the **View** tab, and then in the **Arrangement** group, select **Reverse Sort**. The following screenshot depicts the **Arrangement** group with **Reverse Sort** highlighted.
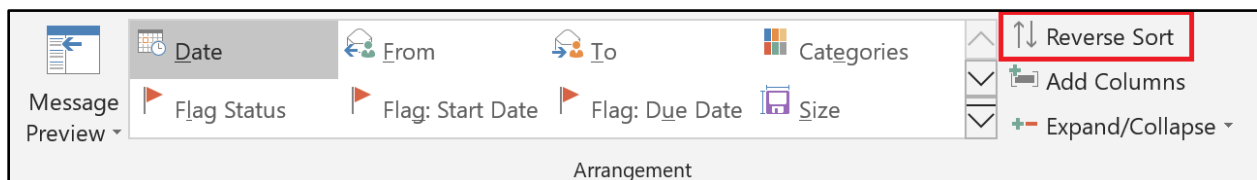
Figure 5: The *Arrangement* group with *Reverse Sort*

To reverse the sort order by using the list heading in the **mail** pane, right-click or access the context menu for the list field heading in the **mail** pane. On the context menu, select **Reverse Sort**, as the following screenshot depicts.
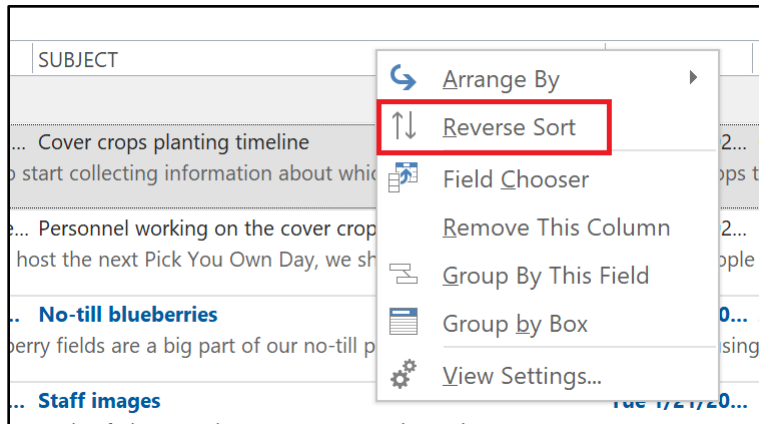
Figure 6: The list field heading context menu with ***Reverse Sort*** *highlighted*
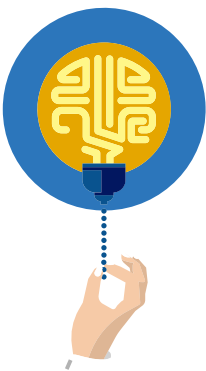
Did you know?

You can choose different **Arrange by** and **Sort** selections for each folder in your mailbox, and Outlook will remember your choices for each different folder.

Activity: Discuss and learn

In this activity, the group will discuss different ways to arrange and sort email messages.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Participate in the discussion led by the teacher.

2. Sort the messages in the **Inbox** folder as directed by the teacher.

Try-it: Sort and arrange email

In this leveled try-it activity, you'll practice applying a new sort order to an email folder.

Try-it 1

In this try-it, you'll use the drop-down menu from the **Sort, Arrange, or Filter** and **Sort Messages** commands to configure the arrangement of mail messages.

Resources

You will need the following resource for this try-it:

- Messages in the **L1_Inbox** folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L1_Inbox** folder.

2. Use the **Sort, Arrange, or Filter** command to identify the current **Arrange By** settings.

3. Change the settings to arrange the folder using the **From** field.

4. Use the **Sort Messages** command to reverse the sort so that names are ordered from Z to A.

Try-it 2

In this try-it, you'll use the context menu from the list headings in the **mail** pane to configure the arrangement of mail messages.

Resources

You will need the following resource for this try-it:

- Messages in the **L1_Inbox** folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L1_Inbox** folder.

2. Use the context menu from the list headings in the **mail** pane to identify the current **Arrange By** settings.

Microsoft

3. Change the settings to arrange the folder using the **From** field.

4. Use the same context-menu to select **Reverse Sort** to reverse the sort so that names are ordered from Z to A.

Try-it 3

In this try-it, you'll use commands on the **View** tab of the ribbon to configure the arrangement of mail messages.

Resources

You will need the following resource for this try-it:

- Messages in the **L1_Inbox** folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L1_Inbox** folder.

2. Select **Attachment** (paperclip icon) in the list headings of the **mail** pane. Observe that this arranges the mailbox so that messages are arranged by file attachment size, with larger files listed first.

3. Navigate to the **View** tab, and select the **More** command to expand the **Arrangement** gallery. Notice that **Size** is selected.

4. Select **From** in the **Arrangement** gallery, and then reverse the sort order.

Topic 2: Filter email

Arranging your messages to suit your preferences can help organize your Inbox and other folders, but you might still find that you have a lot of messages to go through. With Outlook, you can quickly narrow down the list to help you find the messages that matter to you right now.

Outlook provide easy ways to filter the **mail** pane to display only the messages you haven't read, messages in which you are mentioned, or all messages in a folder.

To apply a filter to a folder, in the **mail** pane select the **Sort, Arrange, or Filter** drop-down menu, and then select the **Filter** option you want. Selecting the **All Mail** option will remove the filter and display every message in the folder. **Unread Mail** will display only those messages in the folder that are marked as unread, and **Mentioned Mail** will display only the messages in the folder in which you are tagged with an **@mention**. The following screenshot depicts the **mail** pane with the **Sort, Arrange, or Filter** drop-down menu and the **Filter** options highlighted.
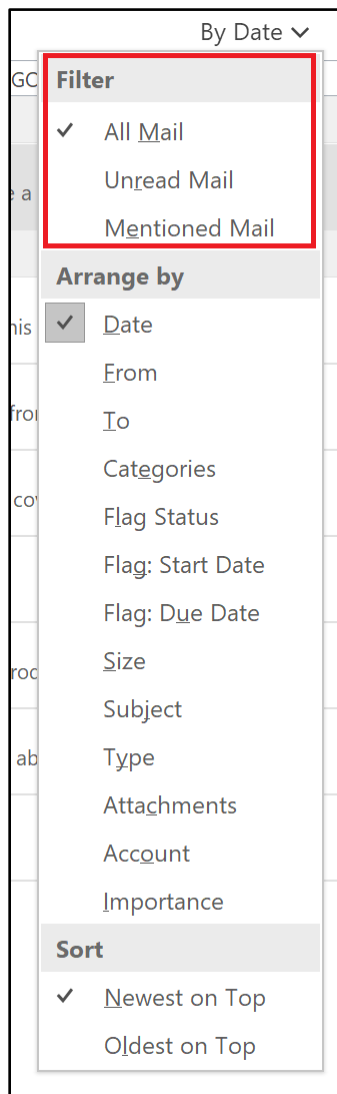
*Figure 7: The **mail** pane with the **Sort, Arrange, or Filter** drop-down menu activated and the **Filter** options highlighted*

Additional information

For more information on filtering messages, go to: [View only unread messages](#)

Mark a message as read or unread

Outlook marks each new email message you receive as **Unread**. After you open and read a message in the **Reading Pane** or open it in the **Message** window, Outlook marks the message as **Read**. The **mail** pane lists unread messages in bold and as you've learned, you can filter the email to only display those messages.

Denoting messages as **Unread** or **Read** is often good enough, but sometimes you might want to change the status of a message yourself. For example, if you quickly review message but know you need to read it more carefully later, you might want to mark it again as **Unread**. And if you know the contents of an email before you read it but don't want to delete the message, you might want to mark it as **Read**.

To mark a message as **Unread** or **Read**, select the **Home** tab, and then in the **Tags** group, select **Unread/Read**. This will switch the status of the email between **Unread** and **Read**. The following screenshot depicts the **Tags** group with the **Unread/Read** option highlighted.
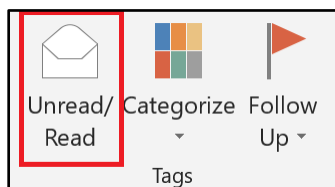
*Figure 8: The **Tags** group with **Unread/Read** highlighted*
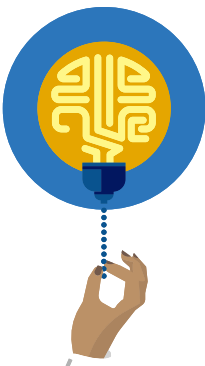
Did you know?

You can also mark a message as read or unread by using keyboard shortcuts. Select a message, and then select Ctrl+U to mark it as **Unread**. Select Ctrl+Q to mark it as **Read**.

Microsoft

To mark a message as read or unread using a context menu, right-click or access the context menu for the message, and then select **Mark as Read** or **Mark as Unread**. The following screenshot depicts an email message's context menu with **Mark as Unread** highlighted.
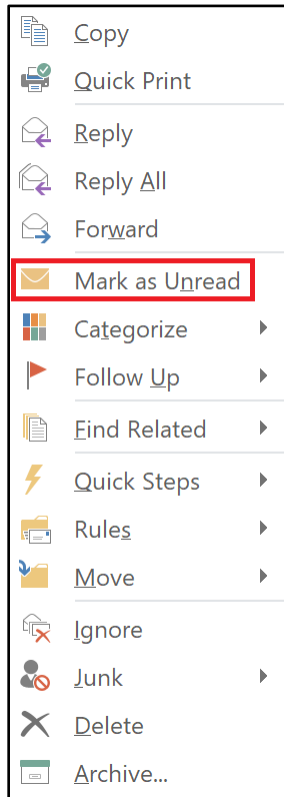
*Figure 9: Email message context menu with **Mark as Unread** highlighted*

Additional information

For more information on marking messages as read or unread, go to: [Mark a message as read or unread](#)

Activity: Show and tell

In this activity, your teacher or a fellow student will demonstrate how to apply a filter to a folder.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following along with the teacher's demonstration. Ask any clarifying questions you might have.

Try-it: Filter email

In this standalone try-it activity, you'll apply a filter to a folder and mark a message as read or unread.

Resources

You will need the following resource for this try-it:

- Messages in the **L1_Inbox** folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L1_Inbox** folder.

2. Filter the folder to display only **Mentioned Mail**.

3. Mark the only message displayed as **Read**.

4. Filter the folder to display only **Unread** messages.

Topic 3: Use the Focused Inbox

Even with filters and sorting, sometimes you might just get too many emails! In the modern workplace, inboxes fill up quickly and you might not be able to keep up. This is especially true if you spend time away from your computer like many of the staff at Munson's Pickles and Preserves Farm, who spend their days out in the fields. With so much incoming email, it's difficult to know what you need to focus on.

The **Focused Inbox** feature separates the messages in your Inbox into two groups: **Focused**, and **Other**. Important and time-sensitive messages get placed on the **Focused** tab, while the rest of your messages go to the **Other** tab where they are out of the way but still easy to find. **Focused Inbox** uses an algorithm to intelligently determine which messages go to **Focused**. Each time you move a message from one tab to the other, Outlook gets better at sorting new messages the way you want.

Microsoft

Turn Focused Inbox on or off

To enable or disable **Focused Inbox**, select the **Inbox** folder, and then select the **View** tab. In the **Focused Inbox** group, you can use the **Show Focused Inbox** command to toggle **Focused Inbox** on or off. The following screenshot depicts the **Focused Inbox** group with **Show Focused Inbox** selected.
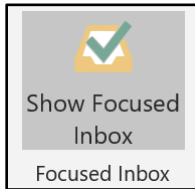
*Figure 10: The **Focused Inbox** group with **Show Focused Inbox** selected*

You can also toggle **Focused Inbox** from the **mail** pane. To do so, select the **Sort, Arrange, or Filter** drop-down menu, and then select **Show Focused Inbox**. The following screenshot depicts the **Sort, Arrange, or Filter** drop-down menu with **Show Focused Inbox** highlighted.
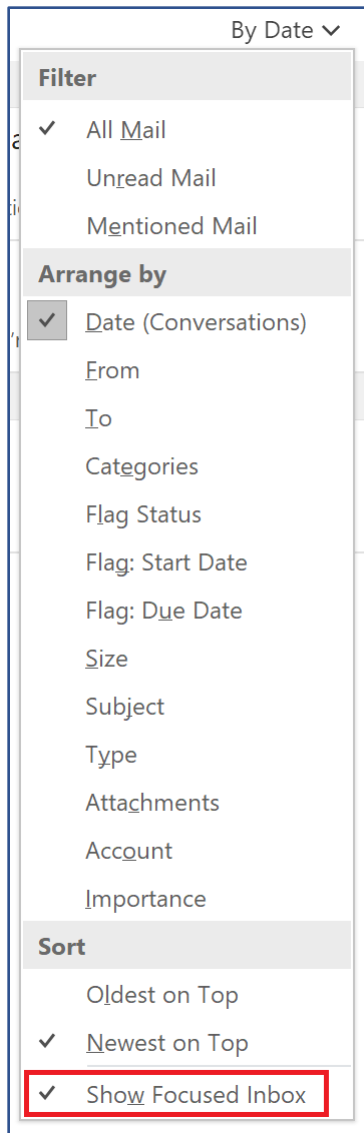
Figure 11: The **Sort, Arrange, or Filter** drop-down menu with **Show Focused Inbox** highlighted

After you turn it on, **Focused Inbox** will add the **Focused** tab and the **Other** tab to the **mail** pane. The following screenshot depicts the **mail** pane with the **Focused** and **Other** tabs highlighted.
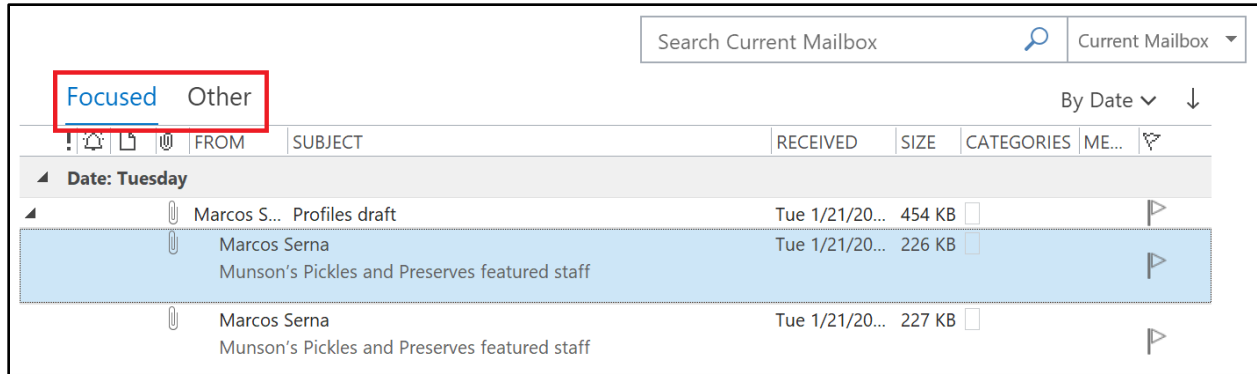
*Figure 12: The **mail** pane with the **Focused** and **Other** tabs highlighted*

Move a message between Focused and Other

To move a message from **Focused** to **Other**, right-click or access the context menu for a message in **Focused**, and then select **Move to Other**. If you want all future messages from the sender to go to **Other**, select **Always Move to Other**. The following screenshot depicts the message context menu with **Move to Other** and **Always Move to Other** highlighted.
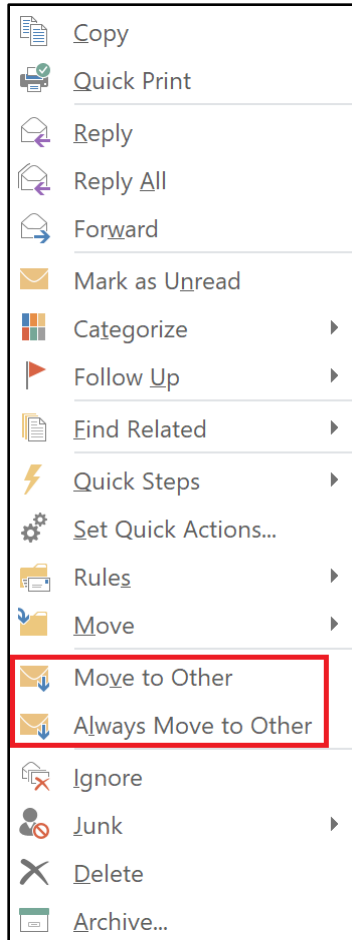
*Figure 13: The message context menu with **Move to Other** and **Always Move to Other** highlighted*

If you're moving a message from **Other** to **Focused**, the context menu will include **Move to Focused** and **Always Move to Focused**.

Video

To review the video on **Focused Inbox**, go to: [Focused Inbox for Outlook](#)

Activity: Tell a story

In this activity, the teacher will engage the class in a discussion related to **Focused Inbox**.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Participate in the group discussion. Then, observe the teacher's demonstration or video and Ask any clarifying questions you might have.

Try-it: Use the Focused Inbox

In this leveled try-it activity, you'll either use, or explain how to use **Focused Inbox**.

Try-it 1

In this try-it activity, you'll describe the function and use of **Focused Inbox**.

Note: Complete this try-it if you do not have access to an email account with **Focused Inbox**. If you have this feature, you should complete Try-it 2.

Resources

You will need the following resources for this try-it:

- None

Instructions

As directed by the teacher, answer the following questions in a Microsoft Word document or on a sheet of paper:

1. In two to four sentences, explain how **Focused Inbox** changes the Inbox.

2. Explain how to move a message from **Focused** to **Other**.

Try-it 2

In this try-it activity, you'll practice enabling and disabling **Focused Inbox** and explore how it changes **Inbox**.

Note: If the email account you use with Outlook doesn't support **Focused Inbox**, you should complete Try-it 1.

Resources

You will need the following resource for this try-it:

- An email account that supports **Focused Inbox**

Microsoft

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. On the **View** tab of the ribbon, in the **Focused Inbox** group, select **Show Focused Inbox** to enable **Focused Inbox**.

2. Select **Other** and observe the messages in the **Other** inbox. Then, select **Focused** and observe which messages display there.

3. As time allows, move messages from **Focused** to **Other**. You can also move messages from **Other** to **Focused**.

Wrap-up

Use these questions to check what you learned in this lesson:

1. Which of the following is not an option for the **Arrange By** setting?

   Select the correct option.

   a. **Date**

   b. **From**

   c. **Junk**

   d. **Subject**

2. Which folders can use the **Focused Inbox** feature?

   Select all that apply.

   a. Any Outlook mail folder

   b. **Drafts**

   c. **Inbox**

   d. **Sent**

3. Which of the following actions can you use to mark an email as read or unread?

   Select all that apply.

   a. A keyboard shortcut

   b. A command on the **Home** tab

   c. A command on the **View** tab

   d. The context menu for a message

   e. The **Follow Up Flag** command

Microsoft

4. To apply an **Arrange By** setting from the ribbon, select an option from the
   _____ gallery.

   Fill in the blank space.

5. The **Focused Inbox** separates all Inbox messages into the **Focused** tab and the
   _____ tab.

   Fill in the blank space.

6. To review only those messages in which you're tagged with an **@mention**, use the
   _____ filter.

   Fill in the blank space.

Lesson 2: Managing conversations

Overview

In this lesson, you'll learn about Outlook features for managing email conversations, including **Conversation Clean Up** and **Ignore Conversation**. The activities, discussions, and demonstrations in this lesson will strengthen your learning and give you the opportunity to practice what you learn about managing conversations.

Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. What is a group of messages that share the same subject line?

    Select the correct option.

    a. Conversation

    b. Thread

    c. Spam

    d. Group

2. Which command is used to group conversations in the **mail** pane?

    Select the correct option.

    a. **Filter**

    b. **Sort**

    c. **Show as Conversation**

    d. **Clean Up Conversation**

    e. **Clean Up Folder**

3. The **Conversation Clean Up** command will _____ duplicate messages in a conversation.

    Fill in the blank space.

4. The _____ tab on the ribbon contains the **Show as Conversation** command.

Fill in the blank space.

Topic 1: Use Conversation view

Email is a useful way to send information to one or more individuals, but its real power is in enabling discussion involving multiple people that goes back and forth. For example, you can send an email out to your classmates asking for help with a concept from your science class that you don't understand. You could get responses from several other students, some offering suggestions and others saying that they need help as well. However, as these students respond to one another, they are generating many messages, and those messages can clutter up your Inbox.

Outlook considers all these messages part of a single conversation, and by default it groups them together in the **mail** pane to help you stay organized and to keep them separated from other, unrelated messages.

A **Conversation** includes all messages that have the same **Subject**. If someone changes the subject when they respond, their message will not be grouped with the rest of the messages in the **Conversation**.

To turn the **Conversation** feature on or off, select the **View** tab of the ribbon, and then in the **Messages** group, select the **Show as Conversations** check box. The following screenshot depicts the **Messages** group with the **Show as Conversations** check box selected.
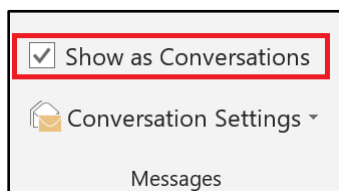
*Figure 14: The **Messages** group with **Show as Conversations** check box selected*

When you select the **Show as Conversations** check box, Outlook will activate a dialog box asking if you wish to apply the change to all mailboxes, or just the current mailbox. The following screenshot depicts the dialog box for selecting **This folder** or **All mailboxes**.
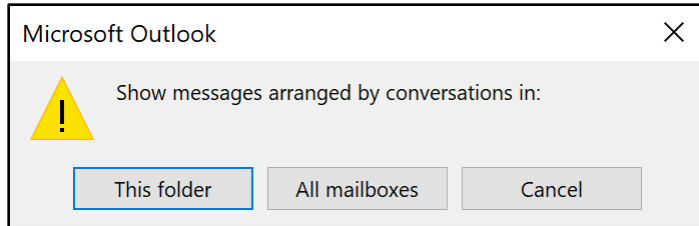
Figure 15: The dialog box for selecting **This folder** or **All mailboxes**

When you have received messages with the same **Subject**, Outlook will automatically create a **Conversation** for the messages and group them together. This grouping is indicated with an **expand/collapse** (triangle) icon. Select this icon to expand or collapse the conversation. The following screenshot depicts the **mail** pane with the **expand/collapse** icon called out for the **Blueberries and Balloons Conversation**.
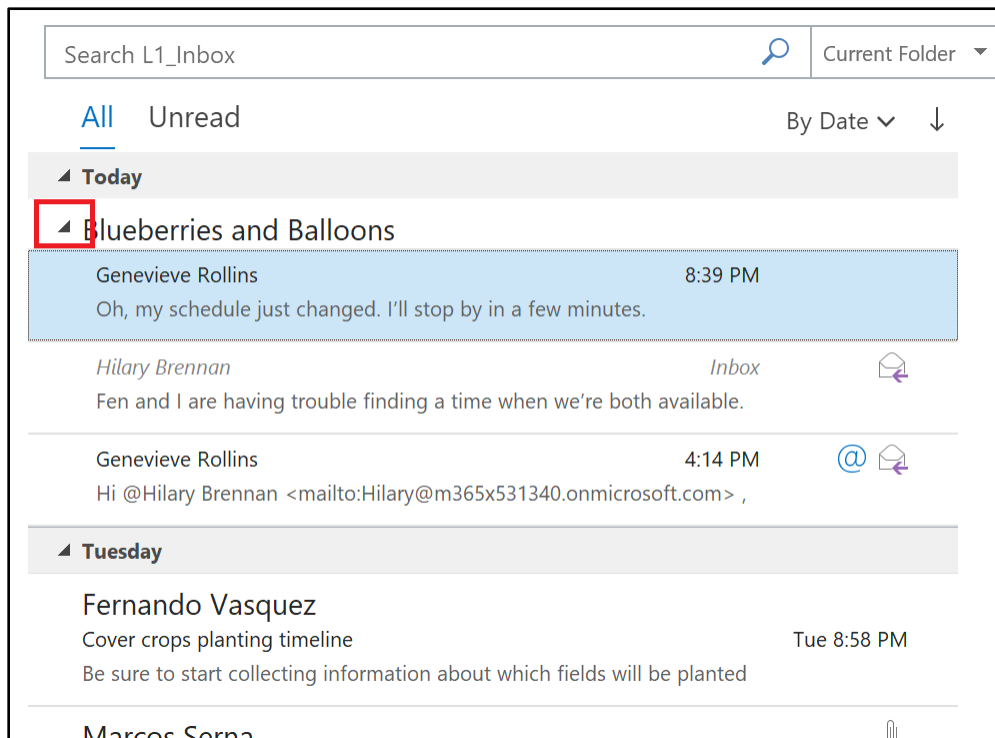
Figure 16: The **mail** pane with the **expand/collapse** icon called out for the **Blueberries and Balloons** conversation

Additional information

For more information on arranging email messages by conversation, go to: View email messages by conversation

Activity: Show and tell

In this activity, your teacher or a fellow student will demonstrate **Conversations** in Outlook.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following along with the teacher's demonstration. Ask any clarifying questions you might have.

Try-it: Use Conversation view

In this standalone try-it, you'll practice using conversations to organize messages within an email folder.

Resources

You will need the following resource for this try-it:

- Messages in the **L2_Inbox** folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L2_Inbox** folder.

2. Turn on **Conversations** and apply the setting to **This folder**.

3. Observe the change in the Inbox. Practice **collapsing** and **expanding** conversations to examine how this changes the **Conversations** display.

Topic 2: Clean up conversations

As more people reply to messages in a **Conversation**, messages will start adding up in your Inbox. In most cases, each reply will include complete copies of the previous messages in the **Conversation**. For example, Marcos sends out a message to all of the employees on the farm. Genevieve replies, and then Fen replies to Genevieve's message. Fen's message will include both Genevieve's response and Marcos' original message.

The **Conversation Clean Up** feature will check the **Conversation** for these kinds of duplications and will delete all the messages that are included in the replies. This makes your Inbox a lot easier to manage! To clean up your conversations, select the **Home** tab on the ribbon, and then in the **Delete** group, select **Clean Up** to activate a drop-down menu of the following **Clean Up** options:

- **Clean Up Conversation** removes duplicate messages in the current **Conversation**.
- **Clean Up Folder** removes duplicate messages in all conversations in the folder.
- **Clean up Folder & Subfolders** removes duplicate messages in all conversations in the current folder and any folders it contains.

The follow screenshot depicts the **Clean Up** options.
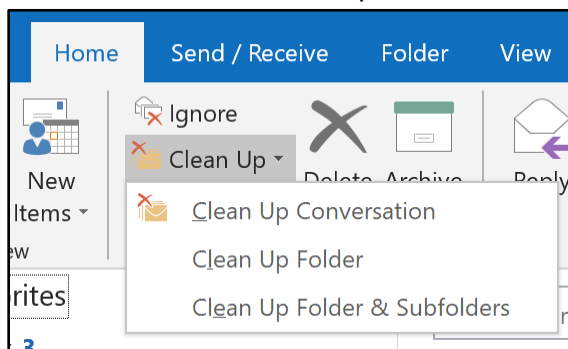
*Figure 17: **Clean Up** drop-down menu options*

A dialog box displays the option you have chosen. If you select **Clean Up Conversation**, the **Clean Up Conversation** dialog box appears from which you would select **Clean Up**, as in the following screenshot.
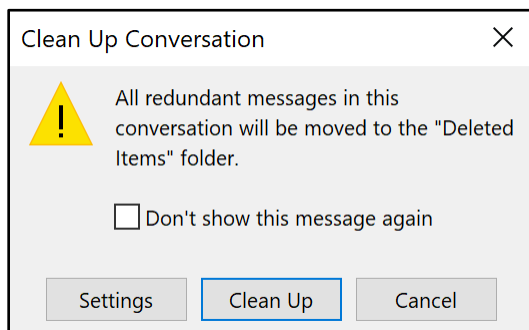
*Figure 18: The **Clean Up Conversation** dialog box*

Additional information

For more information on **Conversation Clean Up**, go to: [Use Conversation Clean Up to delete redundant messages]

Activity: Pose a challenge

In this activity, you'll discuss the problems of having an overwhelming number of messages in your inbox.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Follow the scenario described by the teacher.

2. Work with your classmates to find a solution to the problem.

3. Be prepared to demonstrate your solution to the rest of the class.

Try-it: Clean up conversations

In this standalone try-it activity, you'll use **Clean Up Conversation** to remove duplicate messages.

Resources

You will need the following resource for this try-it:

- **Staff profiles** message in the **L2_Inbox** folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L2_Inbox** folder.

2. Select the **expand/collapse** icon for the first **Conversation** in the folder, which has the subject **Staff profiles**.

3. Observe the messages in the **Conversation**, noting the repetition.

4. Use **Clean Up Conversation** to remove duplicates from only this conversation.

Topic 3: Ignore a conversation

If you find that you're receiving unwanted messages, you can also go further than **Clean Up Conversation**. Although email is a valuable workplace productivity tool, it's also sometimes misused. You might have classmates or colleagues who engage in email discussions that aren't relevant to you or your job, and you don't want those discussions to clutter your inbox. Or perhaps you're still receiving messages for a project or topic that you're no longer involved in.

You can keep an entire conversation out of the inbox with **Ignore Conversation**, which deletes all current messages in the conversation and automatically deletes future messages in the conversation.

To ignore a conversation, select the conversation, or a message in the conversation. Select the **Home** tab on the ribbon, and then in the **Delete** group, select **Ignore**. The following screenshot depicts the **Delete** group with **Ignore** highlighted.
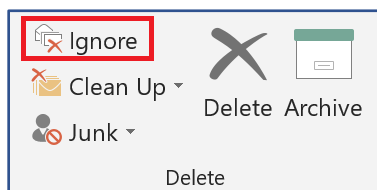
*Figure 19: The **Delete** group with **Ignore** highlighted*
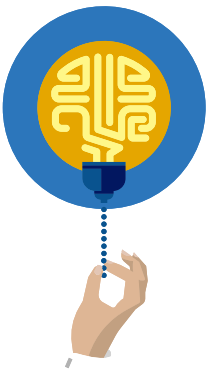
Did you know?

To ignore a conversation using a keyboard shortcut, you can select the **Conversation** or a message within it, and then select Ctrl+Shift+D.

The **Ignore** command or keyboard shortcut will open the **Ignore Conversation** dialog box, which the following screenshot depicts. Select **Ignore Conversation**.

Ignore Conversation	✕
ⓘ The selected conversation and all future messages will be moved to the Deleted Items folder.	
☐ Don't show this message again	
Ignore Conversation	Cancel
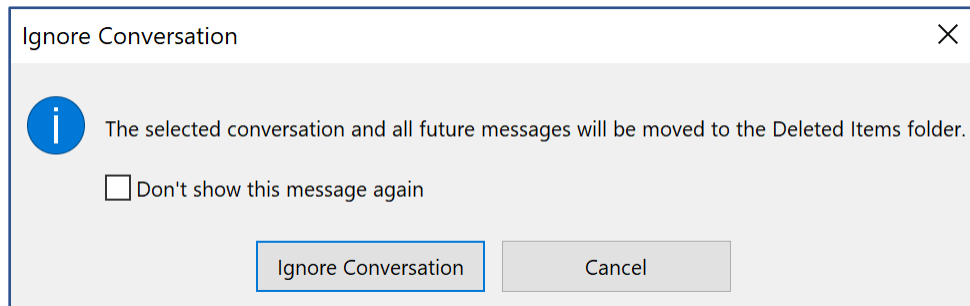
Figure 20: The **Ignore Conversation** *dialog box*

Additional information

For more information on ignoring conversations, go to: [Ignore all email messages in a conversation](#)
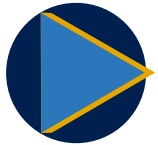
Video

To review the video on ignoring conversations, go to: [Ignore conversations](#)

Activity: Tell a story

In this activity, you'll follow along as the teacher discusses a real-world problem and demonstrates how **Ignore Conversation** can address it.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following along as the teacher describes the problem and demonstrates a solution. Ask any clarifying questions you have along the way.

Try-it: Ignore a conversation

In this standalone try-it activity, you'll use **Ignore Conversation** to clean up a conversation in an email folder.

Resources

You will need the following resource for this try-it:

- **Movie next weekend** message in the **L2_Inbox** folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L2_Inbox** folder.

2. Select the **Conversation** with the subject **Movie next weekend**.

3. Use the **Ignore Conversation** command to delete the **Conversation** and automatically delete all future messages about the **Conversation**.

Wrap-up

Use these questions to check what you learned in this lesson:

1. Which command deletes duplicate messages within a conversation?

   Select the correct option.

   a. **Delete**

   b. **Filter**

   c. **Clean Up Conversation**

   d. **Ignore Conversation**

2. Which command deletes all current and future messages in a conversation?

   Select the correct option.

   a. **Delete**

   b. **Filter**

   c. **Clean Up Conversation**

   d. **Ignore Conversation**

Microsoft

3. Outlook creates a conversation when you receive multiple messages with the same _____.

   Fill in the blank space.

4. To remove duplicate messages from all conversations in a folder, use the _____ command.

   Fill in the blank space.

Lesson 3: Tagging messages for action

Overview

In this lesson, you'll learn to use flags and categories to organize your messages, and to remind you of messages that require follow-up responses. The activities, discussions, and demonstrations in this lesson will strengthen your learning and give you the opportunity to practice what you learn about flags and categories.

Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Which tab on the ribbon includes the commands for flags and categories?

   Select the correct option.

   a. **Home**

   b. **Send / Receive**

   c. **Folder**

   d. **View**

2. Which of the following items are default options for the due date of a **Follow Up Flag**?

   Select all that apply.

   a. **Today**

   b. **Next Monday**

   c. **Next Week**

   d. **Next Month**

3. You can use the _____ feature to assign color-coded tags to messages.

   Fill in the blank space.

4. The first time you use a category, Outlook will ask you to _____ it.

Fill in the blank space.

Topic 1: Flag messages for follow-up

You might often receive email messages that require a response, but you can't respond immediately. For example, a message might ask you a question that requires some research, or you might get the message right before you leave at the end of the day. Although you could mark that kind of message **Unread** to remind yourself to come back to it later, that means that you can no longer tell if a message is really unread or if you have read it but not responded. A **Follow Up Flag** will tag the message with an indication that it needs more attention, and you can integrate this feature with other Outlook features to remind you to respond.

Messages in the **mail** pane includes a **Flag** column that indicates whether a message is flagged. The following screenshot depicts the **mail** pane with one flagged message and one unflagged message.

*Figure 21: The **mail** pane with one flagged message and one unflagged message*

When you flag a message, you can choose to associate the flag with a due date of **Today**, **Tomorrow**, **This Week**, or **Next Week**. If you want a different date, you can select **Custom**, and then manually set a date. Finally, you can select **No Date** if you don't want to specify a deadline. If you do select a due date, Outlook will add a reminder for the selected date. Flagged messages appear in several other locations in Outlook, including the **To-Do Bar**, in **Tasks**, and in the **Daily Task List** in the **Calendar**.

Flag a message using the ribbon

To flag a message using the ribbon, select a message in the **mail** pane. Select the **Home** tab, and then in the **Tags** group, select the **Follow Up** drop-down menu. Select either **No Date**, or the due date you want. The following screenshot depicts the **Tags** group with the **Follow Up** drop-down menu options.
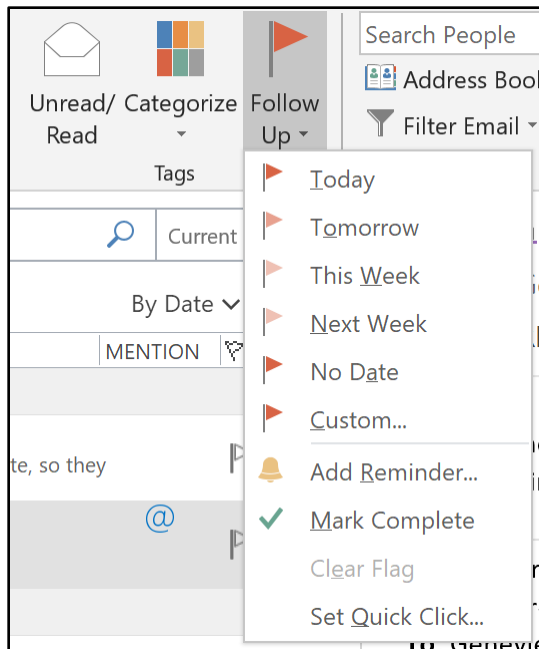
*Figure 22: The **Tags** group with the **Follow Up** drop-down menu options*

If you're reviewing a message in the **Message** window, the **Follow Up** command is also on the **Home** tab, in the **Tags** group.

Flag a message with the context menu

To flag a message using the context menu, right-click or access the context menu for the message in the **mail** pane. Select **Follow Up**, and then select the due date. The following screenshot depicts the context menu for a message in the **mail** pane with **Follow Up** selected.
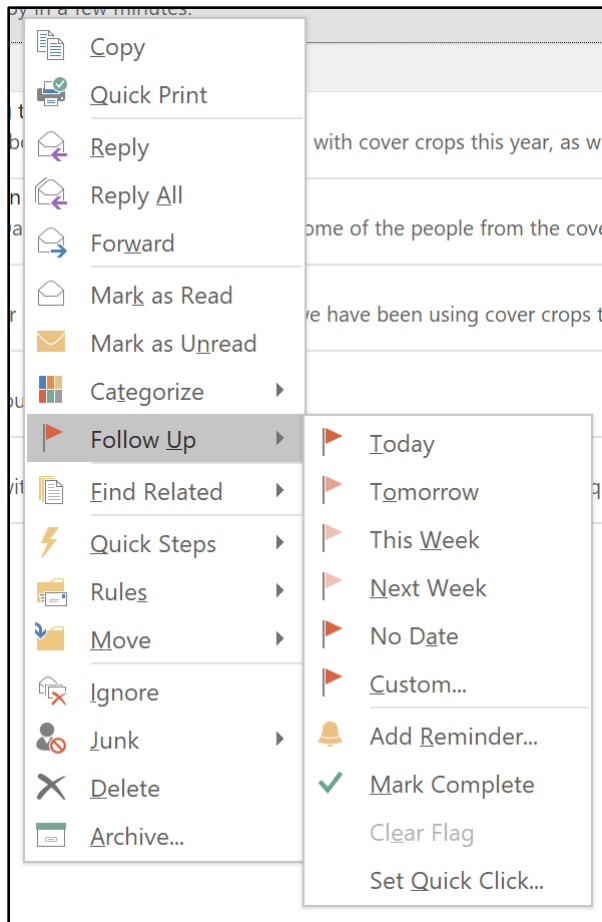
*Figure 23: The context menu in the **mail** pane with **Follow Up** selected*

Flag a message with the Flag as a to-do item option

To flag a message with the **Flag as a to-do item** option, right-click or access the context menu for the **Flag** icon a message in the **mail** pane. This is the **Flag** indicator in the message's **Flag** column. Then select the due date from the context menu. The following screenshot highlights the **Flag as a to-do item** option and depicts its context menu.
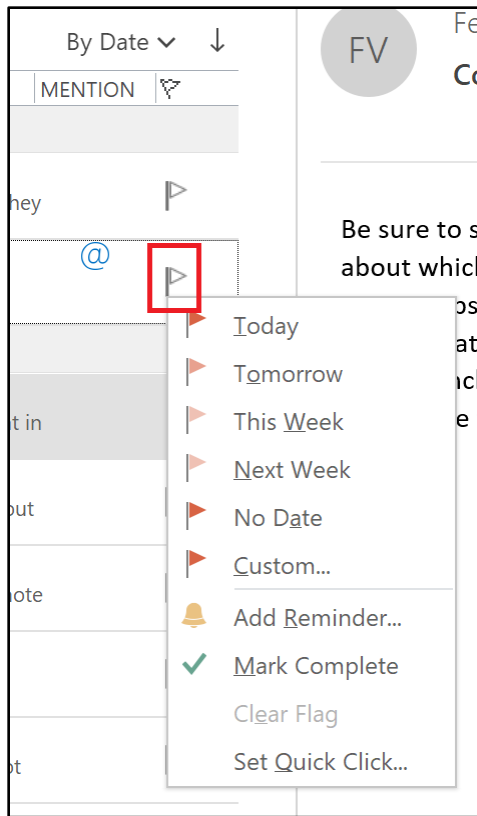
*Figure 24: The context menu for the **Flag as a to-do item** option*

Select a custom due date

If you select **Custom** from the due date options, Outlook will open the **Custom** dialog box. Select **Due Date** to choose the deadline for following up. To receive a pop-up reminder related to the flag, select **Reminder**, and then select the date and time for receiving the reminder. The following screenshot depicts the **Custom** dialog box.

*Figure 25: The **Custom** dialog box*
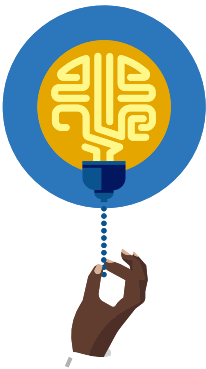
Did you know?

The keyboard shortcut to add a flag is Ctrl+Shift+G, which opens the **Custom** dialog box.

Mark a flagged message as complete

To indicate that you have finished the action required for a flagged message, select the message in the **mail** pane. Select the **Home** tab, and then in the **Tags** group, select **Follow Up** to open the drop-down menu of options. Select **Mark Complete**. The following screenshot depicts the **Tags** group with the **Mark Complete** option selected in the **Follow Up** drop-down menu.
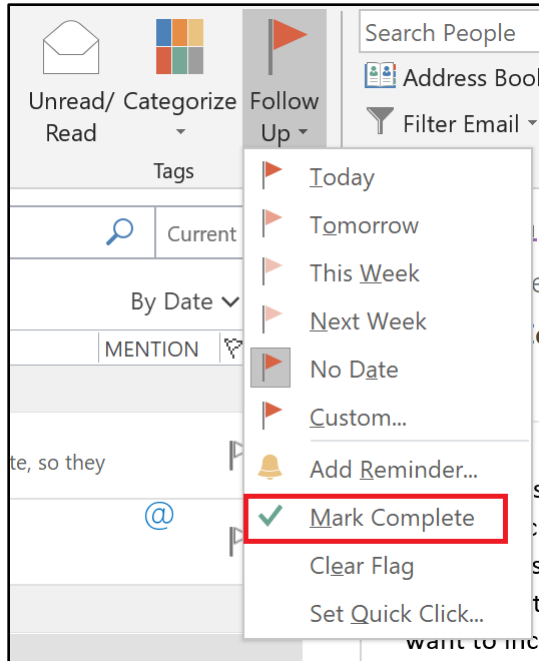
*Figure 26: The **Tags** group with **Mark Complete** selected in the **Follow Up** drop-down menu*

You can also use the **Flag as a to-do item** option to mark a message as complete. Select the **Flag as a to-do item** option, which is depicted as a flag in the **Flag** column.

Additional information

For more information on follow-up flags, go to: Flag email messages for follow up

Activity: Show and tell

In this activity, your teacher or a fellow student will demonstrate flagging messages for follow-up.

Resources required

You will need the following resources for this activity:

• None

Activity instructions

Participate in the activity by following along with the teacher's or student's demonstration. Ask any clarifying questions you might have.

Microsoft

Try-it: Flag messages for follow-up

In this leveled try-it activity, you'll practice flagging a message for follow up and marking a flagged message as complete.

Try-it 1

In this try-it activity, you'll use the ribbon to flag a message for follow-up, and then mark a message as complete.

Resources

You will need the following resource for this try-it:

- **No-till blueberries** and **Cover crops planting timeline** messages in the **L3_Inbox** folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L3_Inbox** folder.

2. Find the message with the subject **No-till blueberries**, and use the ribbon to set a follow-up flag for **Next Week**.

3. Find the flagged message with the subject **Cover crops planting timeline**. Use the ribbon to mark this message as complete.

Try-it 2

In this try-it activity, you'll use the **Flag as a to-do item** option to flag a message for follow-up and then mark a message complete.

Resources

You will need the following resource for this try-it:

- **No-till blueberries** and **Cover crops planting timeline** messages in the **L3_Inbox** folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L3_Inbox** folder.

2. Find the message with the subject **No-till blueberries**, and use the **Flag as a to-do item** option to set a follow-up flag for **Next Week**.

3. Find the flagged message with the subject **Cover crops planting timeline**. Use the **Flag as a to-do item** option to mark this message as complete.

Try-it 3

In this try-it activity, you'll use the context menu to flag a message for follow and then mark a message as complete.

Resources

You will need the following resource for this try-it:

- **No-till blueberries** and **Cover crops planting timeline** messages in the **L3_Inbox** folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L3_Inbox** folder.

2. Find the message with the subject **No-till blueberries** and use the context menu to set a follow-up flag for **Next Week**.

3. Find the flagged message with the subject **Cover crops planting timeline**. Use the context menu to mark this message as complete.
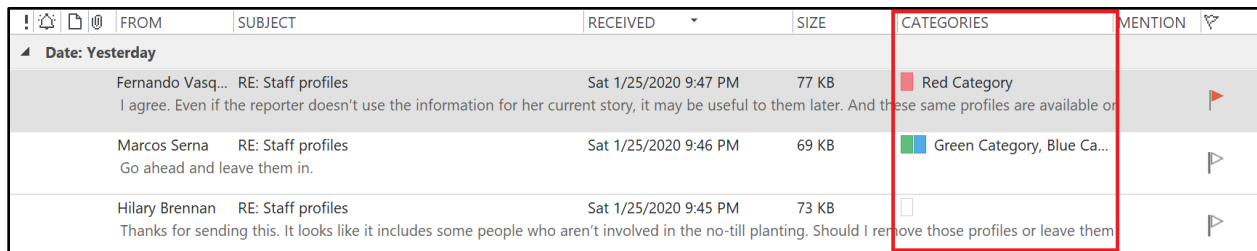
Topic 2: Categorize messages

In addition to the **Follow Up Flag** for tagging messages that require action, Outlook also provides color-coded categories. You can use these tags to label related messages in a way that quickly identifies them in the **mail** pane. For example, you could use different color categories for different projects you're involved in, or different classes you're taking at school. This would make it easier to keep those different topics separate and organized.

You can use default categories, which can be customized with a name, or you can create your own custom color category. You can assign multiple color categories to a message.

Microsoft

Category tags are indicated with the **Toggle Quick Click category** icon in the form of a square, colored box, in the **mail** pane in the **Categories** column. The following screenshot depicts the **mail** pane with the **Categories** column highlighted.

*Figure 27: The **mail** pane with the **Categories** column highlighted*

Tag a message with a color category

To tag a message with a color category, select a message in the **mail** pane, select the **Home** tab, and then in the **Tags** group, select the **Categorize** drop-down menu. Select the color category you want. The following screenshot depicts the **Tags** group with the **Categorize** drop-down menu open.
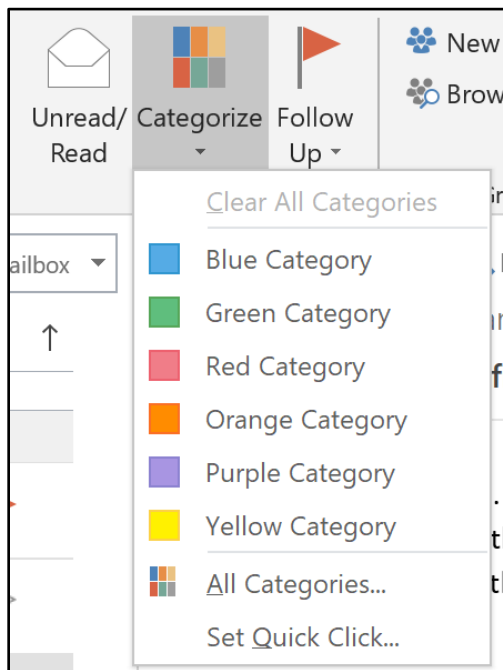
*Figure 28: The **Tags** group with the **Categorize** drop-down menu open*

This drop-down menu will include the default color categories and any categories you have previously added. The first time you assign a default color category to a message, the **Rename Category** dialog box will prompt you for a new name. You can edit the name in the **Name** box, or you can keep the default name. You can also rename the category later. The following screenshot depicts the **Rename Category** dialog box.
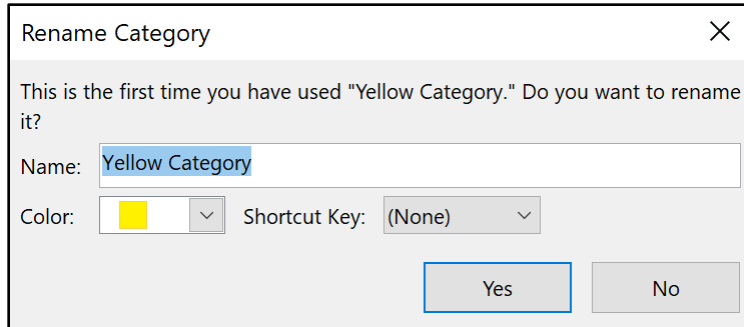
Figure 29: The **Rename Category** *dialog box*

You can also assign a color category with the context menu. To do so, right-click or access the context menu for a message, select **Categorize**, and then select the color category you want to apply.

Similarly, you can right-click or access the context menu in the **Categories** column. You can then select the color category you want to apply from the context menu that opens.

Rename a color category

The default color categories have generic names that correspond with their color, such as **Blue Category** and **Green Category**. As you've learned, Outlook asks you to rename a category the first time you use it. You can keep the default names if you want, but you can also customize them with more descriptive or meaningful labels. Be aware that if you rename a color category that you've already assigned to messages, all of those messages will update to the new name.

To rename a category, select the **Home** tab, and then in the **Tags** group, select the **Categorize** drop-down menu. Select **All Categories** to open the **Color Categories** dialog box, select the category you want to rename, and then select **Rename**. You can then change the text to the name you want. While in the **Color Categories** dialog box, you can repeat the steps to rename other categories at the same time, and then select **OK**. The following screenshot depicts the **Color Categories** dialog box with **Rename** called out.
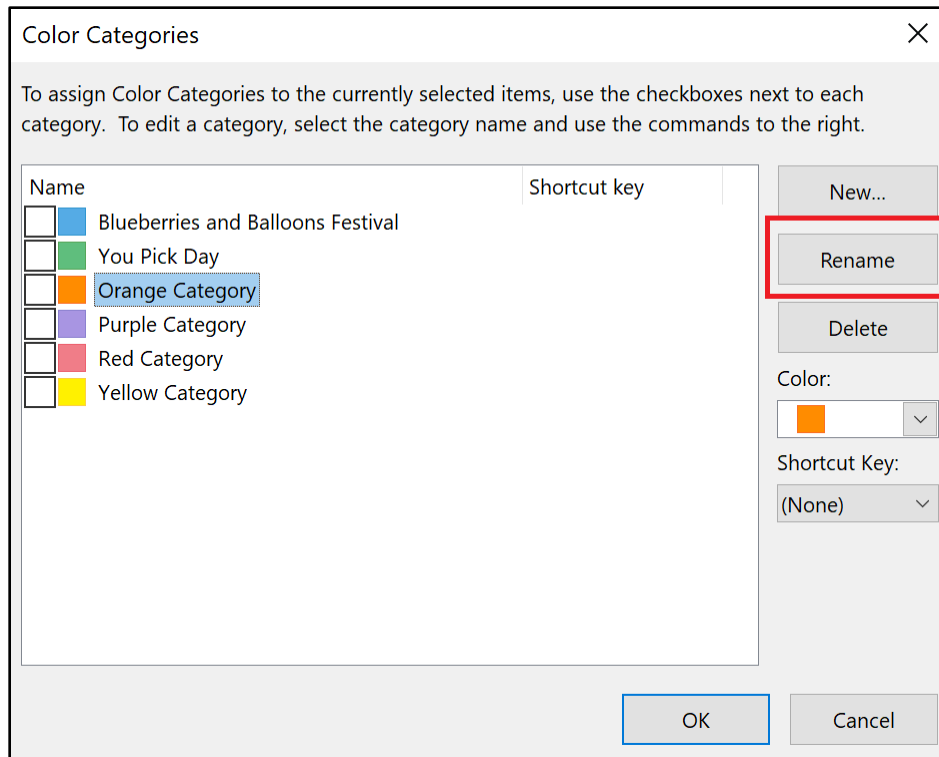
*Figure 30: The **Color Categories** dialog box with **Rename** called out*

Create a color category

If you want, you can even create a color category of your own! Simply select the **Home** tab, and then in the **Tags** group, select the **Categorize** drop-down menu. Next, select **All Categories** to open the **Color Categories** dialog box, and then select **New**. The following screenshot depicts the **Color Categories** dialog box with **New** highlighted.
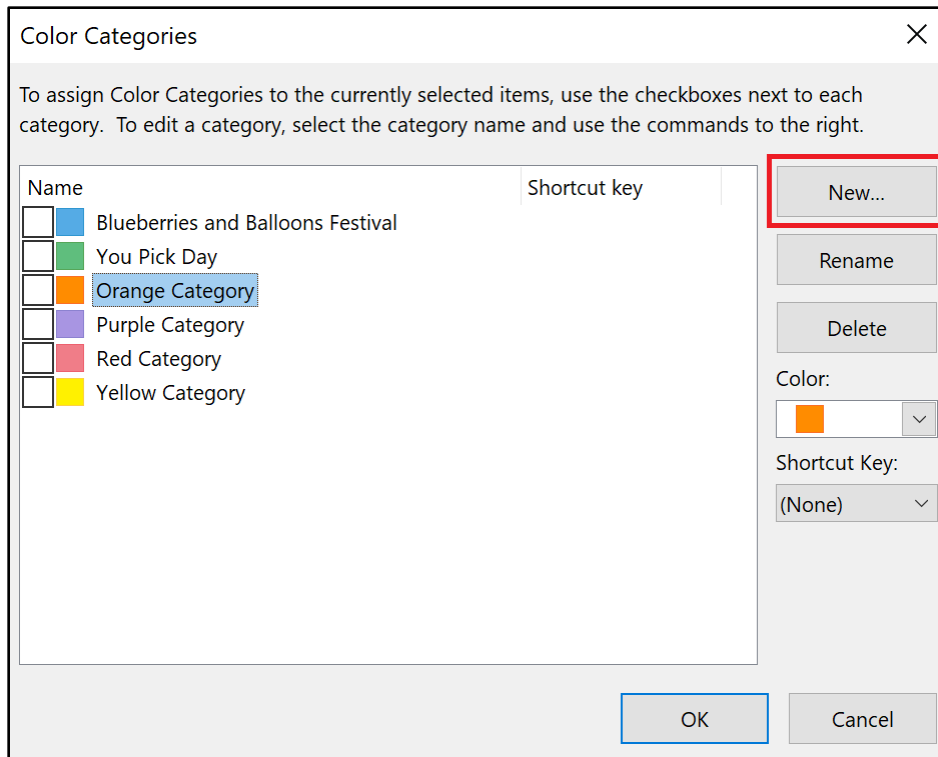
Figure 31: The **Color Categories** dialog box with **New** highlighted

After Outlook opens the **Add New Category** dialog box, enter the name for the new category in the **Name** box. Select **Color** to choose a color for the new category, and then select **OK**. The following screenshot depicts the **Add New Category** dialog box.
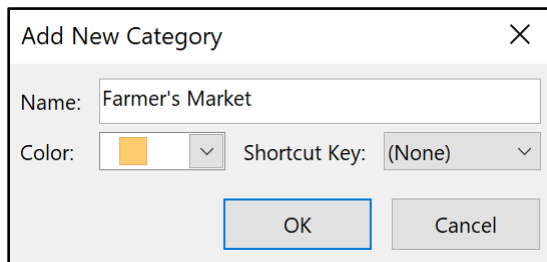
Figure 32: The **Add New Category** dialog box
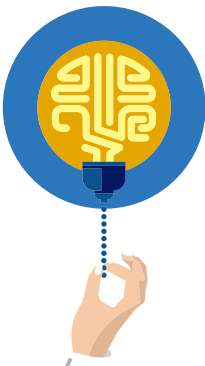
Did you know?

You can also use the keyboard shortcut Alt+D to open the **Color Categories** dialog box, where you can create or rename categories.

Additional information

For more information on color categories, go to: [Create and assign color categories](#)

Activity: Show me how

In this activity, your teacher or a fellow student will demonstrate how to use color categories with email messages.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following along with the teacher's or student's demonstration. Ask any clarifying questions you might have.

Try-it: Categorize messages

In this leveled try-it activity, you'll practice using color categories with email messages.

Try-it 1

In this try-it activity, you'll use the ribbon to assign a color category to a message.

Resources

You will need the following resource for this try-it:

- **Blueberries and Balloons Event** and **Cover crops planting timeline** messages in the **L3_Inbox** folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L3_Inbox** folder.

2. Find the message with the subject **Blueberries and Balloons Event**, and use the ribbon to assign to it the **Blue Category**.

3. Find the message with the subject **Cover crops planting timeline**, and use the ribbon to assign the **Purple Category**.

Try-it 2

In this try-it activity, you'll use the context menu or the **Toggle Quick Click category** icon to assign a color category to a message.

Resources

You will need the following resource for this try-it:

- **Blueberries and Balloons Event** and **Cover crops planting timeline** messages in the **L3_Inbox** folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L3_Inbox** folder.

2. Find the message with the subject **Blueberries and Balloons Event**, and use the context menu or the **Toggle Quick Click category** icon to assign it to the **Blue Category**.

3. Find the message with the subject **Cover crops planting timeline**, and use the context menu or the **Toggle Quick Click category** icon to assign the **Purple Category**.

Try-it 3

In this try-it activity, you'll create a color category and assign it to a message.

Resources

You will need the following resource for this try-it:

- **Staff profiles** and **Staff images** messages in the **L3_Inbox** folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L3_Inbox** folder.

2. Open the **Color Categories** dialog box and create a new category named **Staff Information**. For **Color**, select **Gray**.

3. Find the conversation with the subject **Staff profiles** and assign it to the category **Staff Information**.

4. Find the message with the subject **Staff images** and assign the category **Staff Information**.

Wrap-up

Use these questions to check what you learned in this lesson:

1. What is the default name of the red color category?

   Select the correct option.

   a. **Follow Up Category**

   b. **Priority Category**

   c. **Red Category**

   d. **Urgent Category**

2. Which dialog box do you use to create a new color category?

   Select the correct option.

   a. The **Tags** dialog box

   b. The **Color Categories** dialog box

   c. The **Flags** dialog box

   d. The **Follow Up** dialog box

3. What happens if you change the name of a category that is already assigned to messages?

   Select all that apply.

   a. You cannot change the name to a category that has been used.

   b. Existing messages with that category are updated to the new name.

   c. Existing messages with that category keep the old name.

   d. None of the above

Microsoft

4. When you've finished the follow up action for a flagged message, you can mark it
   _____.

   Fill in the blank space.

Lesson 4: Searching and finding messages

Overview

In this lesson, you'll learn to find specific messages in your mailbox using **Instant Search**, the **Advanced Find** dialog box, and **Search Folders**. The activities, discussions, and demonstrations in this lesson will strengthen your learning and give you the opportunity to practice what you learn about searching messages.

Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Which tab contains the **Recent Searches** command?

   Select the correct option.

   a. The **Home** tab

   b. The **Folder** tab

   c. The **View** tab

   d. The **Search** tab

2. Which of the following features refers to a virtual folder that displays messages based on criteria?

   Select the correct option.

   a. **Advanced Find**

   b. **Folder**

   c. **Instant Search**

   d. **Mailbox**

   e. **Search Folder**

3. When are **Search Folders** updated?

   Select the correct option.

   a. Never

   b. Every time you open Outlook

   c. When you manually send and receive your messages

   d. Continuously

4. Use _____ to search with criteria that are not available in **Instant Search**.

   Fill in the blank space.

Topic 1: Search and Find items

You have now learned how to organize and filter your email messages, but sometimes the easiest way to find the message you need is to search for it. Fortunately, Outlook has an efficient search feature named **Instant Search** to help you find your messages, no matter how cluttered your inbox might be.

Instant Search is in the **mail** pane. It consists of a **Search** box where you input your query, and the **Search Scope** drop-down menu where you can specify where you want to search. The following screenshot depicts the **mail** pane with the **Search** box and **Search Scope** highlighted.
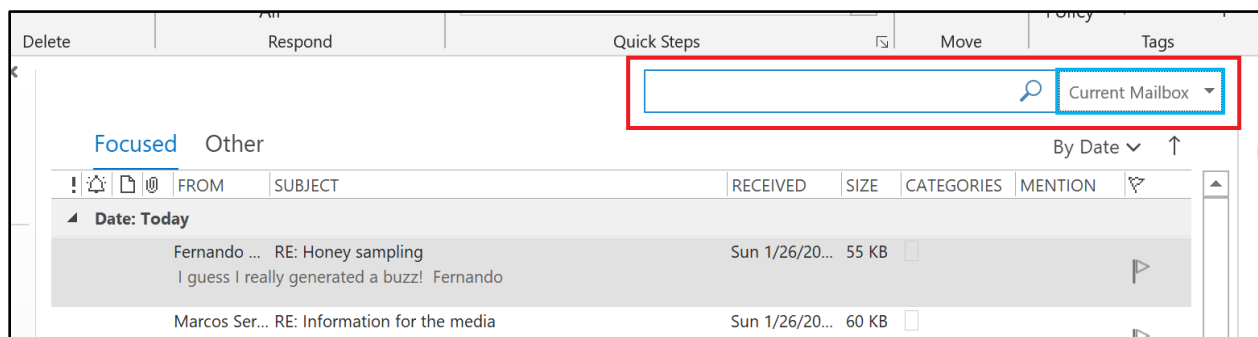
*Figure 33: The **mail** pane with the **Search** box and the **Search Scope***

To search for a term or phrase, select **Search**, and then enter a term—such as a name, word, or phrase. In additional to words or phrases in your messages, **Instant Search** also enables you to search by the first name, last name, or even partial name of someone in the message or conversation.

As you enter the text you want to search for, **Instant Search** display the search results, updating each time you add a new character. **Results** will list messages that contain the word or name with the search text highlighted. **Instant Search** will also present a drop-down menu you can choose from with suggested search terms based on your input.

Select a message in **Results** to review it in the **Reading Pane**. The following screenshot depicts an example of **Results** with the suggestion of **staff profiles** highlighted.
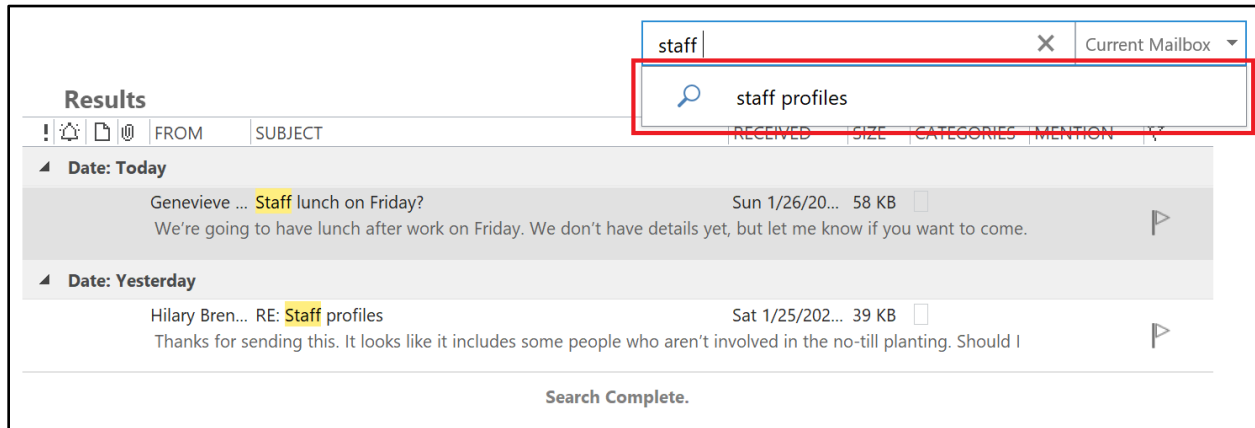
*Figure 34: An example of **Results** with the suggestion words highlighted*

Much like a search engine on the internet, you can refine your search results by changing how you enter search terms. For example:

- Placing your terms in quotes will search for messages with that exact phrase. For example, **"blueberries and balloons"** will return messages with that phrase, but not messages with **blueberries** and **balloons** as separate words in the message.
- Including **AND** (in all capital letters) between words will find messages with both words, but not necessarily together or in that order. Example: **blueberries AND balloons** will search for messages with **blueberries** and **balloons** as separate words in the message.
- Including **OR** (in all capital letters) between words will find messages with either word, but not necessarily both. Example: **blueberries OR balloons** will search for messages with either **blueberries** or **balloons** as separate words in the message.
- Including **NOT** (in all capital letters) between words will find messages with the first word, but not the second. Example: **staff NOT images** will search for messages with the word **staff**, but not include messages that also have the word **images**.

Microsoft

To change which locations **Instant Search** searches, select the **Search Scope** drop-down menu. The default **Search Scope** is **Current Mailbox**, which limits results to messages in the current mailbox you have selected. The option **Current Folder** is commonly used when you know you moved the message you want to a folder and want to search there. Other options for **Search Scope** include **Subfolders**, **All Mailboxes**, and **All Outlook Items**. The following screenshot depicts **Instant Search** with the **Search Scope** drop-down menu highlighted.
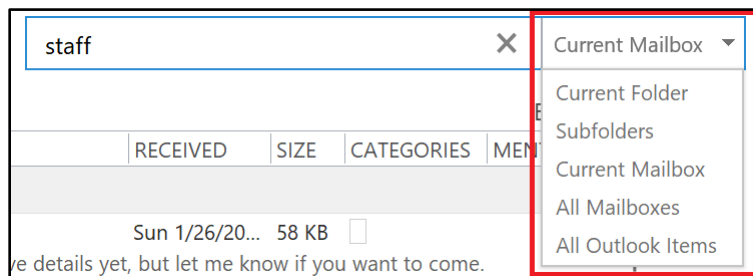
*Figure 35: **Instant Search** with the **Search Scope** drop-down menu highlighted*

Outlook keeps track of your searches and makes it possible to review and reuse them. To review your recent searches, select the **Search** box, and note that the **Search** contextual tab displays on the ribbon. In the **Options** group, select **Recent Searches** to open a drop-down menu of recent searches. You can then select an option from the list to run that search again. The following screenshot depicts the **Options** group with the **Recent Searches** drop-down menu opened.
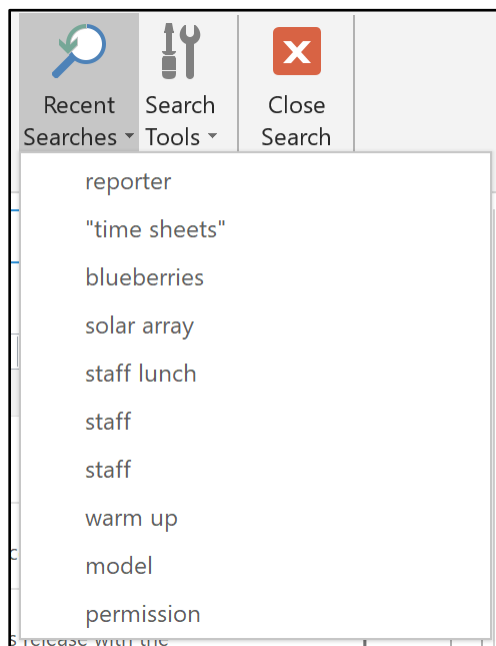
*Figure 36: The **Options** group with the **Recent Searches** drop-down menu*

When you're finished using **Instant Search**, you can close **Results** from the ribbon. Select the **Search** contextual tab, and then in the **Options** group, select **Close Search**. You can also access the **Close Search** command in the **Search** box, where it's depicted as an **X**.
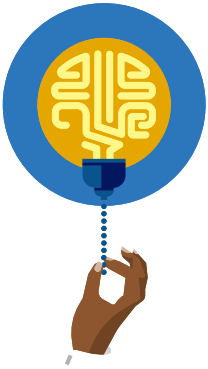
Did you know?

The keyboard shortcut for the **Instant Search** command is Ctrl+E.

Refine your search results

The **Search** contextual tab includes a variety of commands to help narrow down the results provided by **Instant Search**. These commands are in the **Refine** group, as depicted in the following screenshot.
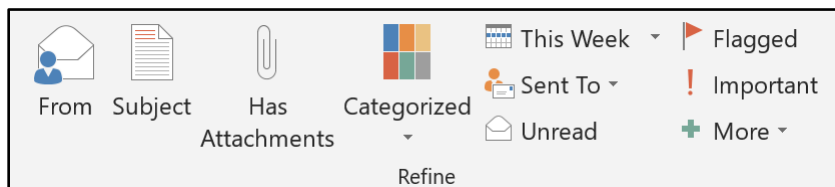
*Figure 37: The **Refine** group on the **Search** tab*

In the **Refine** group, select the command you want to use. Outlook will add corresponding text to the **Search** bar. Some commands in the **Refine** group require you to enter additional information. For example, to refine your search based on who the message is from, you'll need to select **From**, and then input the name of the sender. In that case, Outlook will position the cursor in the correct location for you to input the name. The following screenshot depicts the **Search** bar after the user has selected **From**, with the cursor positioned to add the name.
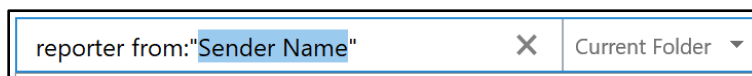
*Figure 38: The **Search** bar after the user has selected **From***

When you start entering a full name, such as **Marcos Serna**, or a partial name, such as **Marcos**, the text **Sender Name** will be replaced with the entered name. **Instant Search** will update **Results** to display messages sent by **Marcos**.

You can add as many **Refine** commands to your search as you want. Each one will help filter the results to a smaller number of emails, making it easier to find the message you're searching for. The following table describes the predefined commands in the **Refine** group.

From	Only displays results from a specific person.
Subject	Only displays results based on the subject.
Has Attachment	Only displays emails that have attachments.
Categorized	Only displays results that have a specific category assigned to them.
This Week	Searches by when the email message was received: **Today**, **Yesterday**, **This Week**, **Last Week**, **This Month**, **Last Month**, **This Year**, or **Last Year**.
Sent To	Searches messages with the options **Sent to You**, **Not Sent Directly to You**, or **Sent to Another Recipient**.
Unread	Only displays unread messages.
Flagged	Only displays messages flagged by you.
Important	Only displays email marked as **Important**.
More	Filters your results based on more advanced criteria, such as **Cc** or **Sensitivity**.

Table 2: Commands in the Refine group

Additional information

For more information on **Instant Search**, go to: [Find a message or item with Instant Search](#)

Video

To review the video on filtering email, go to: [Search and filter email](#)

Microsoft

Activity: Show and tell

In this activity, your teacher or a fellow student will demonstrate how to find messages with **Instant Search**.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following along with the teacher's or student's demonstration. Ask any clarifying questions you might have.

Try-it: Search and Find items

In this leveled try-it, you'll practice using **Instant Search** to find messages in a mailbox.

Try-it 1

In this try-it activity, you'll use a keyword search in **Instant Search** in the current folder.

Resources

You will need the following resource for this try-it:

- Messages in the **L4_Inbox** folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L4_Inbox** folder.

2. Use the **Search Scope** drop-down menu to limit your search to **Current Folder**.

3. Enter **staff** in the **Search** box, and notice how **Results** populates with every message containing the word *staff*.

4. Continue entering text in the **Search** box, adding **lunch** so the complete search phrase is **staff lunch**. Observe that the results are narrowed down.

5. Select **Search Scope**, and from the drop-down menu, select **All Mailboxes**. Notice that the **Results** window now displays messages from other mailboxes as well. Because the .pst file includes copies of the same messages in different folders, each instance is displayed.

Microsoft

Try-it 2

In this try-it activity, you'll use a keyword search in **Instant Search** and then refine the results.

Resources

You will need the following resource for this try-it:

- Messages in the **L4_Inbox** folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L4_Inbox** folder.

2. Use the **Search Scope** drop-down menu to limit your search to **Current Folder**.

3. Enter **blueberries** in the **Search** box, and observe how **Results** populates with every message containing the word *blueberries*.

4. To narrow the search, use the **Refine** command **Has Attachments** to narrow the search down to messages that have attachments.

Try-it 3

In this try-it activity, you'll use and refine a keyword search in **Instant Search**, and then repeat the search with **Recent Searches**.

Resources

You will need the following resource for this try-it:

- Messages in the **L4_Inbox** folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L4_Inbox** folder.

2. Use the **Search Scope** drop-down menu to limit your search to **Current Folder**.

3. Enter **blueberries** in the **Search** box, and observe how **Results** populates with every message containing the word *blueberries*.

4. Use the **Refine** command **From** to narrow the search to messages from **Marcos**.

5. Observe the results, and then close the search.

6. Create a new search for the term **balloons**, and observe those results.

7. Use **Recent Searches** to reuse the search for messages from **Marcos** containing the word **blueberries**.

Topic 2: Use Advanced Find

The **Instant Search** feature makes it possible to find messages with a variety of options to help narrow the results. Most of the time, **Instant Search** will be powerful enough to quickly find the message you're after. However, if you need a more advanced search tool, you can use **Advanced Find**.

To access **Advanced Find**, select the **Search** box to gain access to the **Search** addition to the ribbon. Select the **Search** tab, and then in the **Options** group, select **Search Tools**. On the drop-down menu of commands, select **Advanced Find**, as exhibited in the following screenshot.
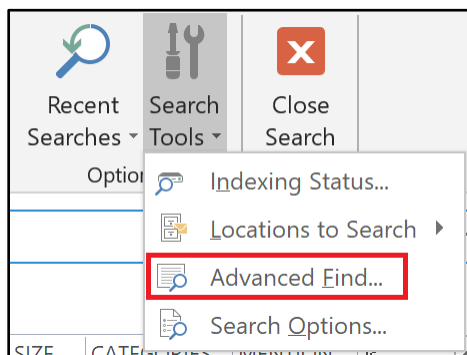
*Figure 39: The **Options** group with **Search Tools** selected, and **Advanced Find** highlighted*
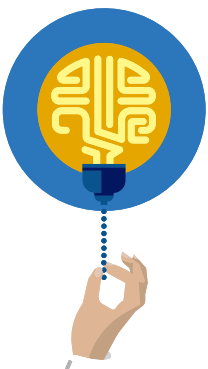
Did you know?

The keyboard shortcut for the **Advanced Find** command is Ctrl+Shift+F.

Selecting **Advanced Find** will open the **Advanced Find** dialog box, which you can use to build your search. In this dialog box, select the **Advanced** tab to access commands for building a search. The following screenshot depicts the **Advanced Find** dialog box with the **Advanced** tab selected.
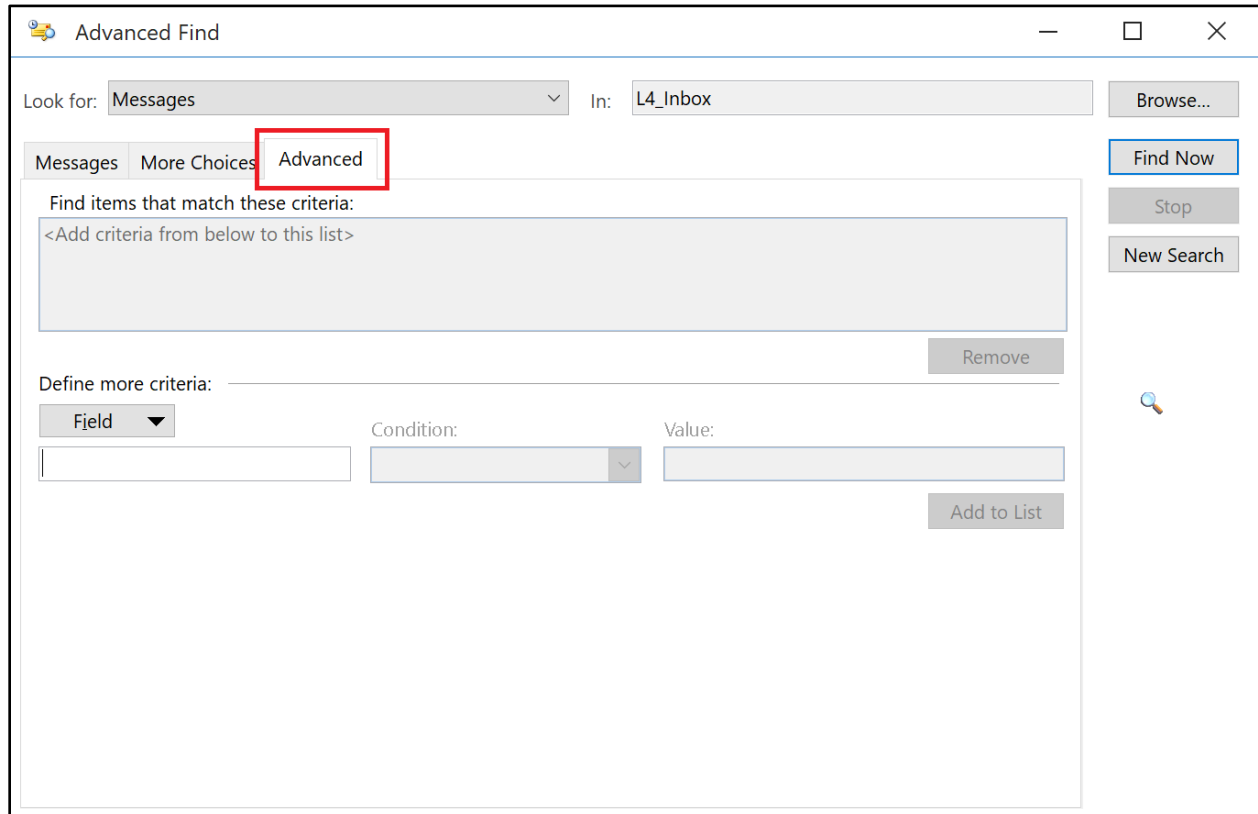
*Figure 40: The **Advanced Find** dialog box with the **Advanced** tab selected*

In the **Advanced Find** dialog box, use commands in the **Define more criteria** section to specify search criteria one rule at a time. Select **Field**, and then select **All Mail fields** to open a list of all the fields you can use for a search. Some are familiar, such as **Subject**, **From**, and **To**. Others will be less obvious, as indicated in the following screenshot.
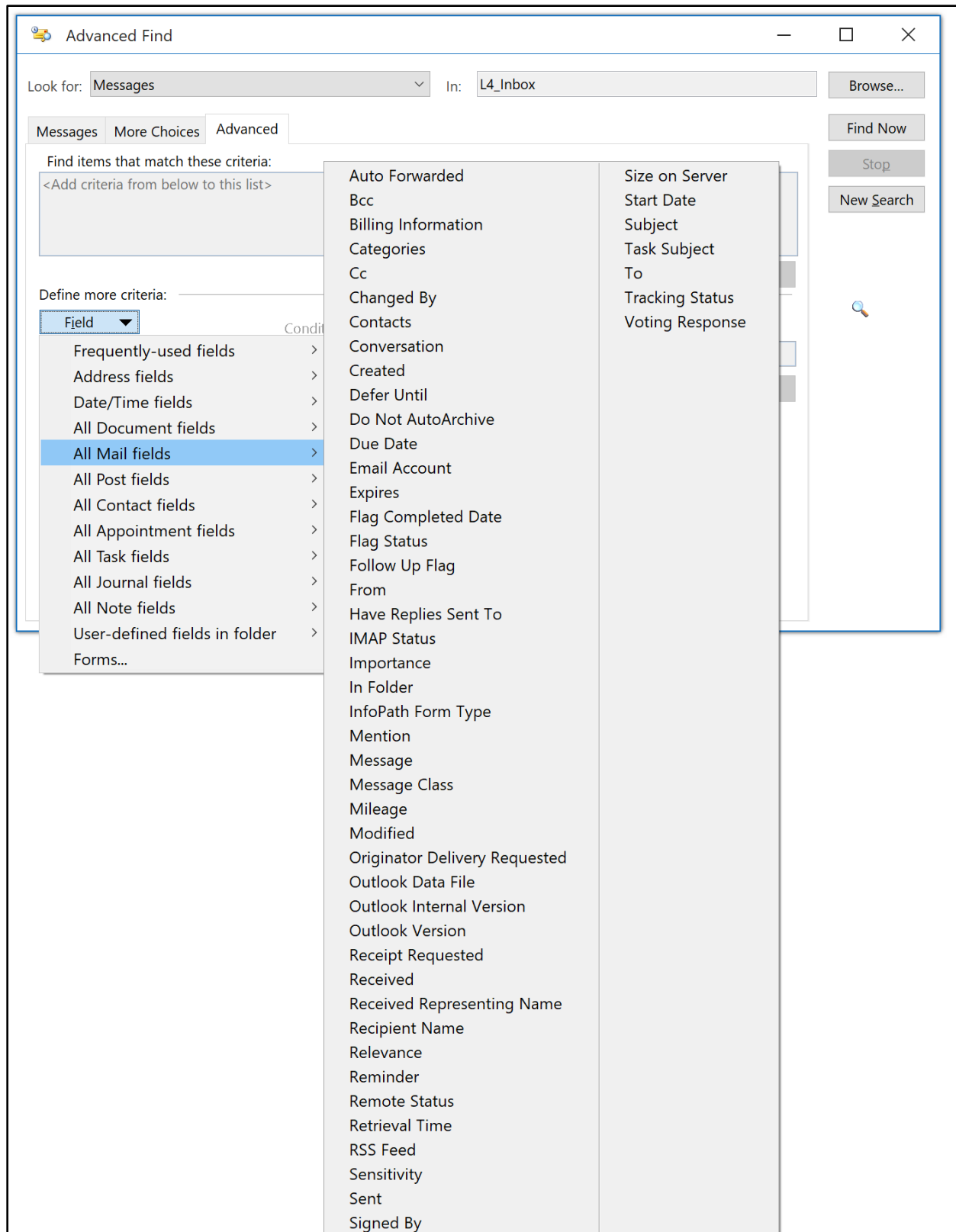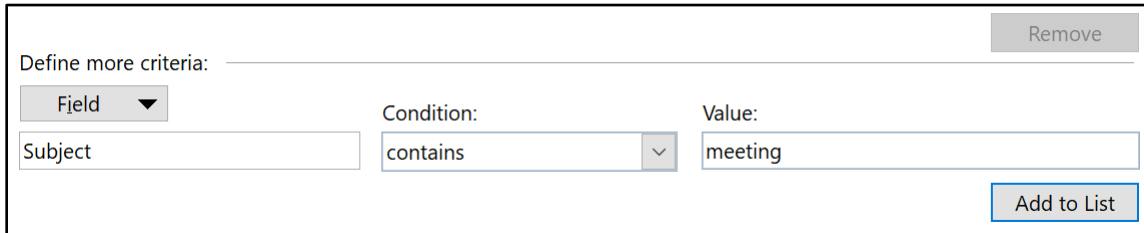
*Figure 41: The **Fields** drop-down menu with **All Mail fields** selected*

To build your search, select a **Field** from the drop-down menu. Next, select from the **Condition** drop-down menu. The choices will vary based on the field, but if you select **Subject** you can choose from **contains**, **is (exactly)**, **doesn't contain**, **word starts with**, or **phrase matches**. After selecting a **Condition**, select **Value**, and enter a value. This process builds a criterion. For example, the following screenshot depicts **Define more criteria** with the options set to **Subject**, **contains**, **meeting**.

*Figure 42: **Define more criteria** with the options set to **Subject**, **contains**, **meeting***

Select **Add to List** to make this criterion part of your search. Repeat the process to add more criteria, just as you added multiple keywords or **Refine** commands to **Instant Search**. When you finish adding criteria, select the **Find Now** button to run the search, and then review the results. The following screenshot depicts the **Advanced Find** dialog box displaying the results of a search, with the **Find Now** button called out.

Figure 43: The **Advanced Find** dialog box displaying the results of a search, with the **Find Now** button called out

Additional information

For more information on **Instant Search**, go to: Find a message or item with Instant Search

Activity: Pose a challenge

In this activity, you or another student will use **Advanced Find** to create a new search with the help of the teacher.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Review the scenario described by the teacher.

2. Demonstrate your solution to the class, asking for assistance from the teacher, as needed. If you don't get a chance to demonstrate, follow along and ask any clarifying questions you might have.

Try-it: Use Advanced Find

In this standalone try-it activity, you'll create a search with **Advanced Find**.

Resources

You will need the following resource for this try-it:

- A message in the **L4_Inbox** folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L4_Inbox** folder.

2. Open the **Advanced Find** dialog box.

3. On the **Advanced** tab, select **Field**, and the, from the **All Mail fields** menu, select **Subject**.

4. Set the **Condition** to **contains**.

5. Edit the **Value** to **meeting**, and then add the criterion to the list.

6. Create a second criterion with **Field** set to **From**, **Condition** set to **contains**, and **Value** set to **Marcos**. Add this criterion to the list.

7. Run the search and notice that it found one message sent by **Marcos** that contains the word **meeting** in the **Subject**.

Microsoft

Topic 3: Create and use Search Folders

You can also extend the power of the Outlook search features into a useful organizational tool. A **Search Folder** is a virtual folder that provides an overview of all email messages matching specific search material. It displays like a folder in your mailbox, but messages aren't actually in the **Search Folder**, they are just listed there.

For example, you could create a **Search Folder** for each message with a **Follow Up Flag**. When you select this **Search Folder**, you could observe every message with a **Follow Up Flag**, regardless of which folder they are in. Many people use a **Search Folder** to display all of their unread mail, so they can go to one place to catch up on reading messages even when the messages are saved in different folders within their mailbox.

Create a Search Folder

To create a search folder, select the **Folder** tab on the ribbon, and then in the **New** group, select **New Search Folder**. The following screenshot depicts the **New** group with **New Search Folder** highlighted.
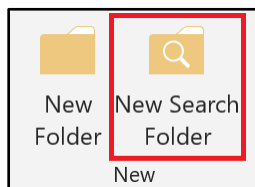
*Figure 44: The **New** group with **New Search Folder** highlighted*

You can also access **New Search Folder** from the **Folder Pane**. To do so, right-click or access the context menu for **Search Folders**, and then select **New Search Folder**. The following screenshot depicts the context menu for **Search Folders** with **New Search Folder** selected.
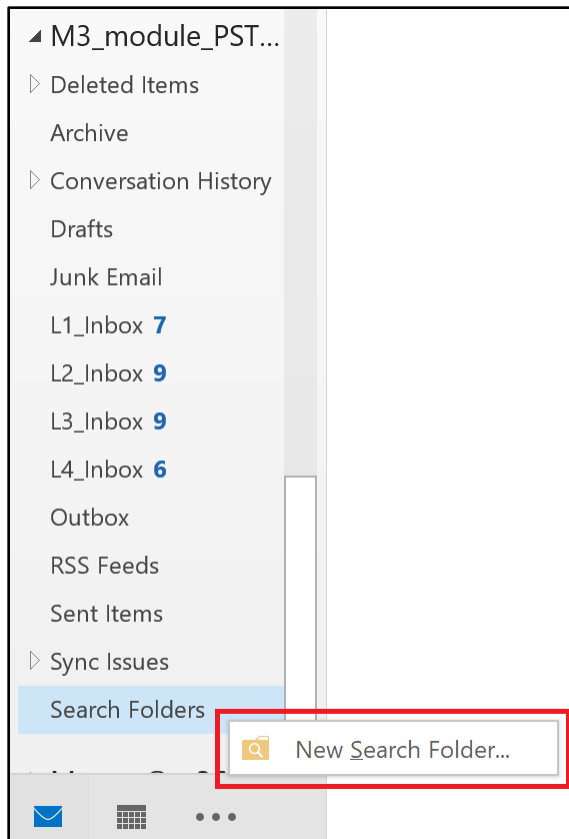
*Figure 45: The context menu for **Search Folders** with **New Search Folder** selected*

The **New Search Folder** command opens the **New Search Folder** dialog box. The **Select a Search Folder** list includes a variety of predefined **Search Folder** settings to address the most common uses of the feature. The following screenshot depicts the **New Search Folder** dialog box with a predefined **Search Folder** for **Unread mail** selected.
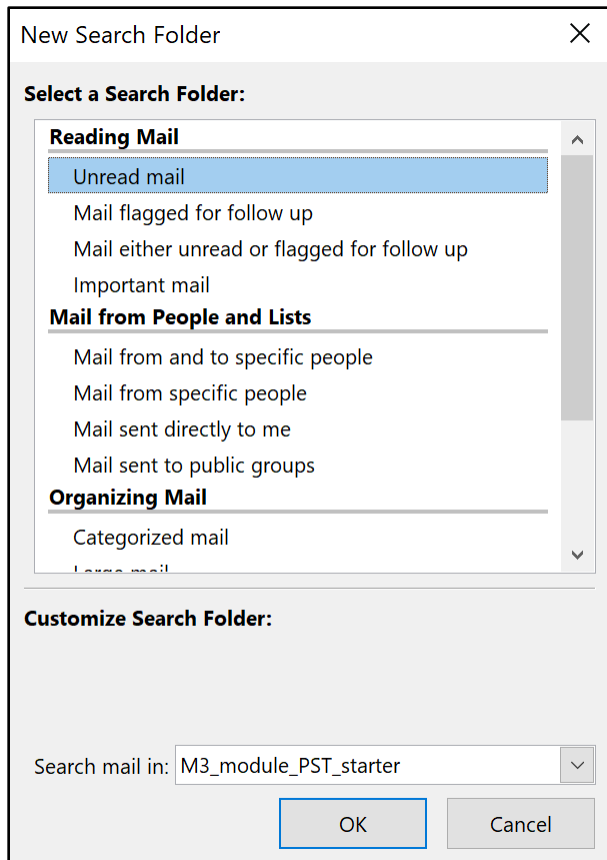
*Figure 46: The **New Search Folder** dialog box with a predefined **Search Folder** for **Unread mail** selected*

In this example, select **OK** to create the new **Search Folder** for **Unread mail**. If the predefined **Search Folder** has customization options, **Customize Search Folder** will display fields for entering the necessary information. The following screenshot depicts the **New Search Folder** with **Categorized mail** selected and the fields in **Customize Search Folder** selected.

New Search Folder   ✕

Select a Search Folder:

> Mail either unread or flagged for follow up
> Important mail
> **Mail from People and Lists**
> Mail from and to specific people
> Mail from specific people
> Mail sent directly to me
> Mail sent to public groups
> **Organizing Mail**
> Categorized mail
> Large mail
> Old mail
> Mail with attachments
> Mail with specific words

Customize Search Folder:

Show mail with these categories:

Any Category   Choose...

Search mail in: M3_module_PST_starter   ▾

OK   Cancel
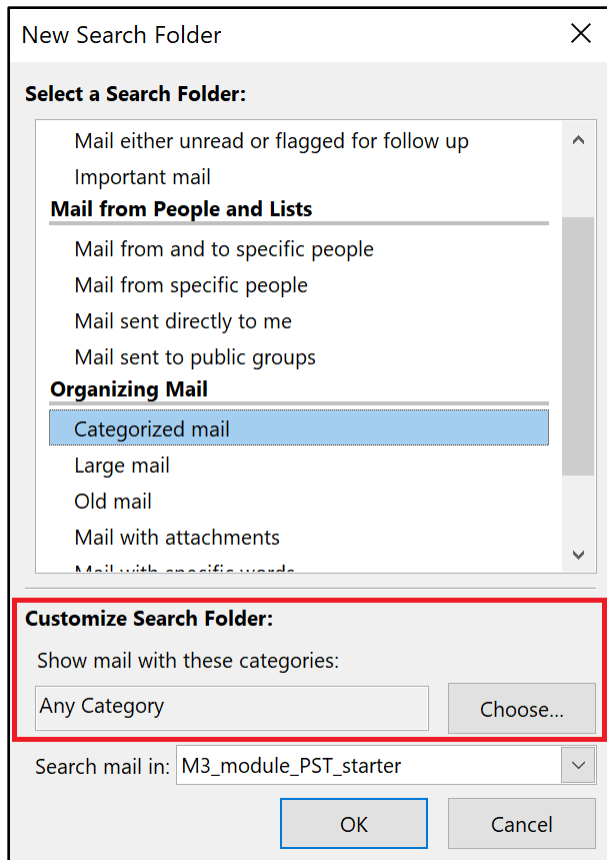
*Figure 47: The **New Search Folder** with **Categorized mail** selected and the fields in **Customize Search Folder** selected*

Select the **Choose** button to specify criteria for the **Search Folder**. Select **OK** to close the **New Search Folder** dialog box and create the **Search Folder**.
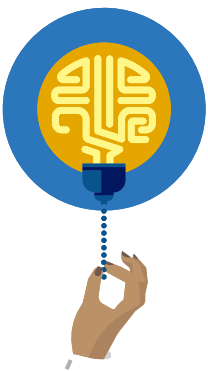
Did you know?

In addition to the predefined **Search Folder** configurations, you can create customized **Search Folders** with more complex criteria.

View messages in a Search Folder

When you review a **Search Folder**, it will contain a list of messages that meet the criteria you specified when you created it. The list is updated each time you review it, so new messages or messages that have changed (through the addition of a **Follow Up Flag**, for example) will be added to the list if they meet the criteria.

To review the contents of a **Search Folder**, navigate to the **Folder Pane** and select the **Search Folder**. The results will display in the **mail** pane. This is similar to any other folder with a column in the list heading named **In Folder**, which specifies the folder in which each message is saved.

The ribbon includes commands for modifying **Search Folders**. To modify a **Search Folder**, select the folder in the **Folder Pane**, and then select the **Folder** tab. The **Actions** group includes:

- **Rename Folder**, which you can use to change the name of the **Search Folder**.
- **Delete Folde**r, which will delete the **Search Folder**.

  Note: Because messages are saved in a different folder, deleting a **Search Folder** will not delete or change any of the messages contained within it.

- **Customize This Search Folder**, which you can use to modify a predefined **Search Folder**. If you create a customized **Search Folder**, you use this option to edit customizations.

The following screenshot depicts the **Actions** group on the **Folder** tab.
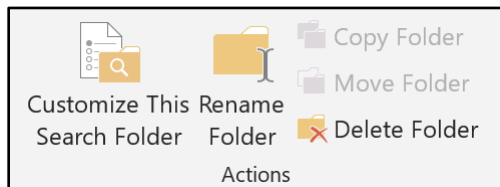
*Figure 48: The **Actions** group in the **Folder** tab*

Additional information

For more information on **Search Folders**, go to: <u>Use Search Folders to find messages or other Outlook items</u>
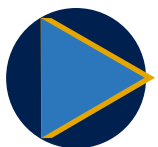
Video

To review the video on **Search Folders**, go to: <u>Create or delete a search folder</u>

Microsoft

Activity: Pose a challenge

In this activity, the teacher will challenge you to create a solution to keep email messages more organized.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Participate in the teacher-led discussion and offer ideas for solving the proposed challenge. Then observe demonstrations and ask clarifying questions if necessary.

Try-it: Create and use Search Folders

In this standalone try-it activity, you'll create several **Search Folders** by using predefined **Search Folder** configurations.

Resources

You will need the following resource for this try-it:

- Messages in the **L4_Inbox** folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L4_Inbox** folder.

2. Use the ribbon to create a **Search Folder** for all email sent by **Marcos Serna**.

3. Use the context menu in the **Folder Pane** to create a **Search Folder** for all messages with the word **meeting** in the **Subject**.

4. Use either method to create a **Search Folder** for all messages with attachments.

Wrap-up

Use these questions to check what you learned in this lesson:

1. Which group contains commands for narrowing down **Instant Search** results?

   Select the correct option.

   a. **Options**

   b. **Refine**

   c. **View**

   d. **Tags**

2. What happens to messages when you delete a **Search Folder**?

   Select the correct option.

   a. Messages contained in the **Search Folder** are deleted.

   b. Messages contained in the **Search Folder** are moved to their previous folders.

   c. Messages contained in the **Search Folder** are not affected.

   d. A **Search Folder** cannot be deleted if it contains messages.

3. The **Search** box and **Search Scope** drop-down menu are part of the
   _____ feature.

   Fill in the blank space.

4. Use the _____ tab in the **Advanced Find** dialog box to add criteria
   to a new search.

   Fill in the blank space.

Lesson 5: Organizing messages with folders

Overview

In this lesson, you'll learn how to create and use folders to organize email messages. The activities, discussions, and demonstrations in this lesson will strengthen your learning and give you the opportunity to practice what you learn about Outlook folders.

Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Which of the following describes containers for saving email messages?

   Select the correct option.

   a. Attachments

   b. Filters

   c. Folders

   d. Panes

2. Which tab on the ribbon includes commands for moving messages?

   Select the correct option.

   a. **Home**

   b. **Folder**

   c. **View**

   d. **Search**

3. You can make new _____ to organize your email messages.

   Fill in the blank space.

Topic 1: Create folders

Folders offer a way to organize your email messages and other Outlook items. Just like paper folders in a file cabinet, you can use Outlook folders to group related items and make them easier to find. You can create any organization system you want, but many people create folders for different purposes, such as:

- Projects they are working on.
- Tasks they must complete.
- People or customers they are communicating with.
- Classes or programs at school.

To create a folder, begin by going to the **Folder Pane** and right-clicking or accessing the context menu for the folder to which you want to add a new folder; for example, **Inbox**. From the context menu, select **New Folder**. The following screenshot depicts the context menu in the **Folder Pane** with **New Folder** highlighted.
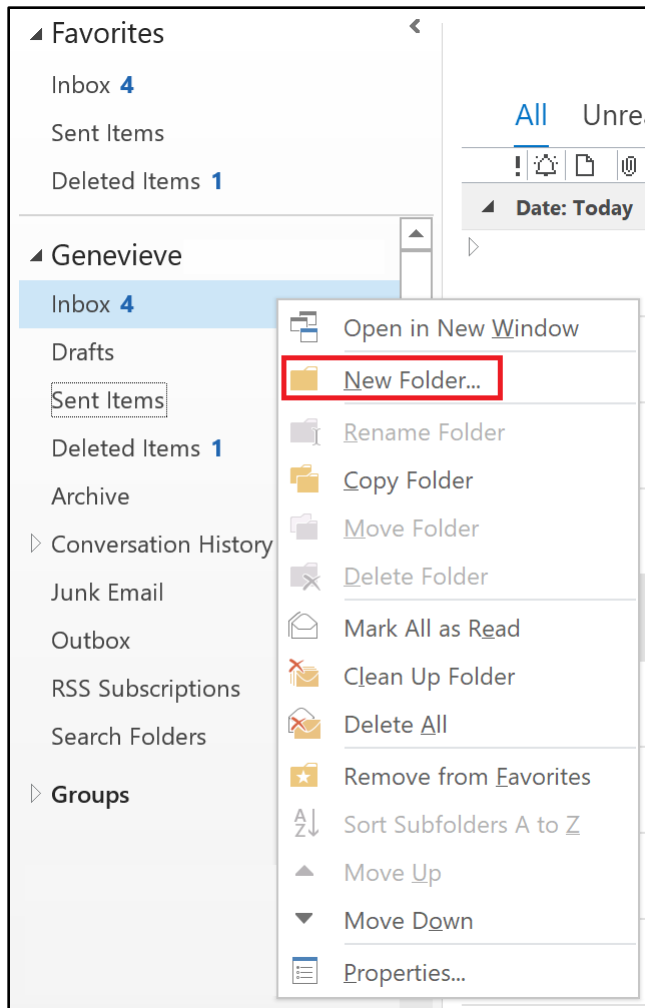
*Figure 49: The context menu in the **Folder Pane** with **New Folder** highlighted*

In the **Name** box that displays, enter a name for the new folder. Be sure to be descriptive so you can recognize it later. The following screenshot depicts the **Name** box for a new folder named **Internship**.

*Figure 50: The **Name** box for a new folder named **Internship***

You can also create a new folder by using commands on the ribbon. Select the **Folders** tab, and then in the **New** group, select **New Folder**. The following screenshot depicts the **New** group with **New Folder** highlighted.
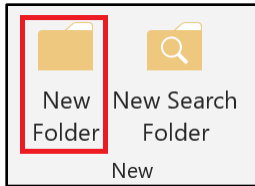
*Figure 51: The **New** group with **New Folder** highlighted*

The **New Folder** command opens the **Create New Folder** dialog box. Select the **Name** box and enter a name for the new folder. Under **Select where to place the folder**, select a location, such as **Inbox**, and then select **OK**. The following screenshot depicts the **Create New Folder** dialog box.
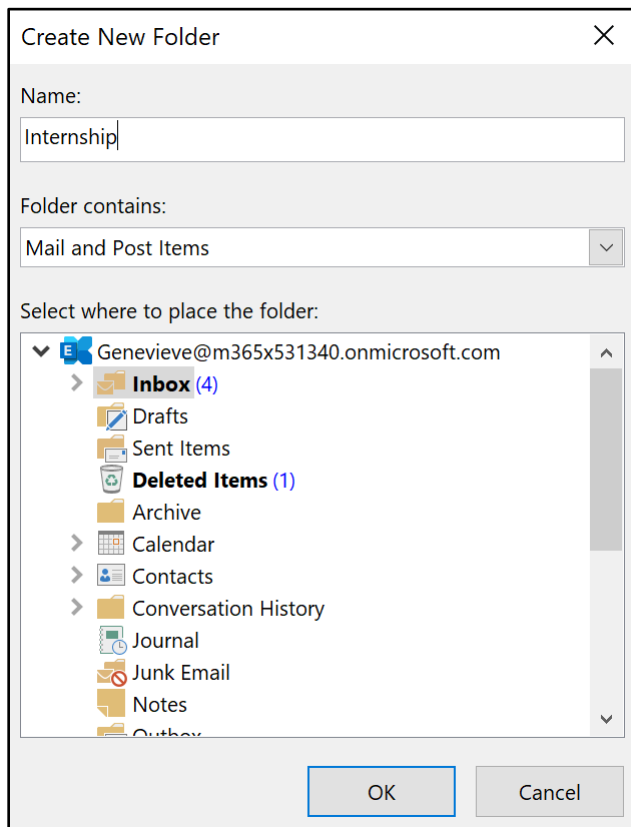
*Figure 52: The **Create New Folder** dialog box*

Additional information

For more information on creating folders, go to: Create a folder in Outlook

Activity: Show me how

In this activity, your teacher or a fellow student will demonstrate how to create folders in Outlook.

Resources required

You will need the following resource for this activity:

- The **L5_Inbox** folder

Activity instructions

Participate in the activity by demonstrating how to create a folder, or by following along with the teacher's or student's demonstration. Ask any clarifying questions you might have.

Try-it: Create folders

 In this leveled try-it activity, you'll practice creating folders to organize email messages.

Try-it 1

In this try-it activity, you'll create a new folder by using the context menu.

Resources

You will need the following resource for this try-it:

- The **L5_Inbox** folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L5_Inbox** folder.

2. Use the context menu to create a new folder named **Media Information**.

3. Use the context menu to create a subfolder within **Media Information** with the name **Events**.

Try-it 2

In this try-it activity, you'll create a new folder by using the ribbon.

Resources

You will need the following resource for this try-it:

- The **L5_Inbox** folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L5_Inbox** folder.

2. Use the ribbon to create a new folder named **Media Information**.

3. Use the ribbon to create a subfolder within **Media Information** with the name **Events**.

Topic 2: Move messages between folders

After you've created folders, there are several different ways to move messages from one folder to another. You can move messages to a new folder by using drag and drop. Simply select the message you want to move, and then drag it to the destination folder. The ribbon also includes commands for moving messages to a different folder. To move a message, select the message you want to move, select the **Home** tab, and then in the **Move** group, select the **Move** drop-down menu. Now select the destination folder. The following screenshot depicts the destination folder options in the **Move** drop-down menu in the **Move** group on the **Home** tab.
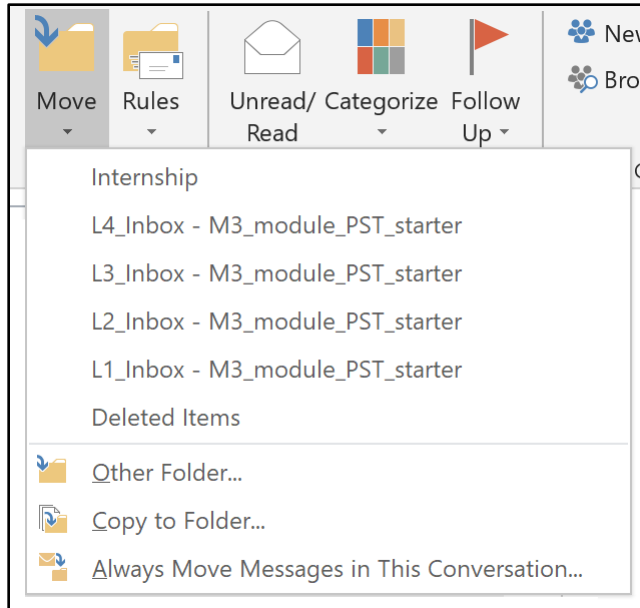
*Figure 53: The **Move** drop-down menu in the **Move** group on the **Home** tab*

If the folder you want is not listed, select **Other Folder** to open the **Move Items** dialog box, and then select the desired folder. The following screenshot depicts the **Move Items** dialog box.
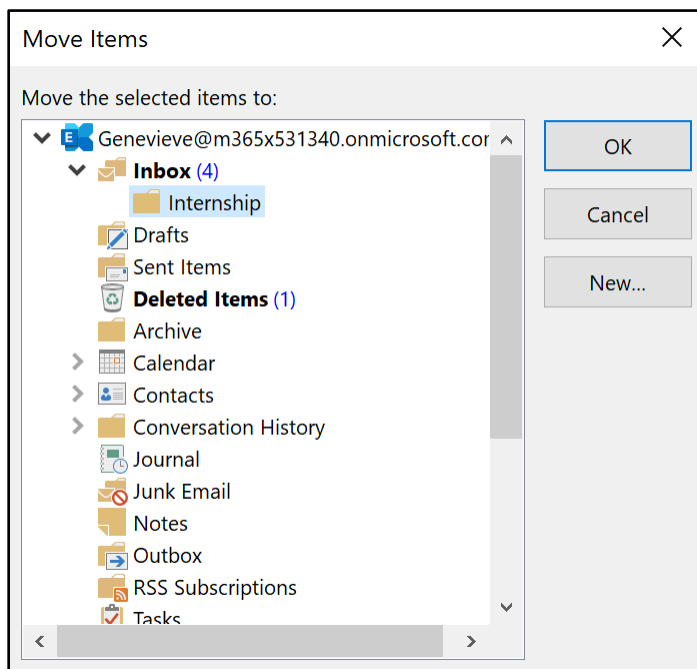
*Figure 54: The **Move Items** dialog box.*

You can also move messages by using the context menu in the **mail** pane. To do so, right-click or access the context menu for the message, and then select **Move**. This will display a list of destination folders. Select a folder from the menu, or select **Other Folder** if the desired folder is not listed. The following screenshot depicts the context menu for the **Move** option in the **mail** pane.
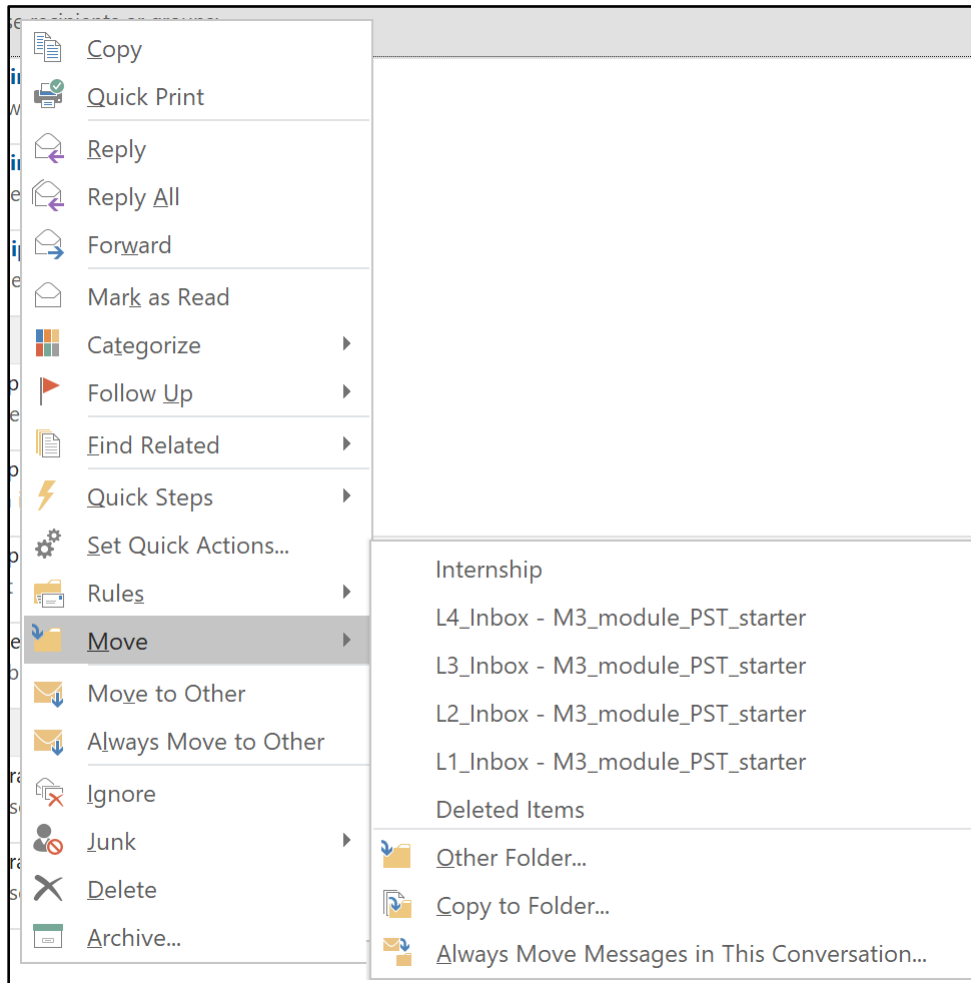
*Figure 55: The context menu in the **mail** pane with **Move** selected.*
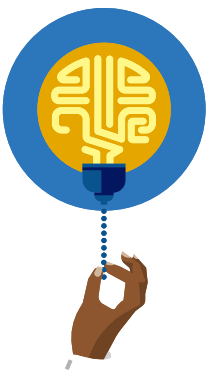
Did you know?

You can also use the **Cut** and **Copy** commands to move messages from one folder to another.

Additional information

For more information on moving messages between folders, go to:
Move or copy an item to another folder

Activity: Show me how

In this activity, your teacher or a fellow student will demonstrate how to create folders in Outlook.

Resources required

You will need the following resource for this activity:

- The **L5_Inbox** folder

Activity instructions

Participate in the activity by demonstrating how to move email messages, or by following along with the teacher's or student's demonstration. Ask any clarifying questions you might have.

Try-it: Move messages between folders

In this leveled try-it activity, you'll practice moving messages from one folder to another.

Try-it 1

In this try-it activity, you'll move messages by using commands on the ribbon.

Resources

You will need the following resources for this try-it:

- The **Company overview** and **No-till blueberries** messages in the **L5_Inbox** folder
- The **Media Information** and **Events** folders that you created in the previous try-it activities

Microsoft

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L5_Inbox** folder.

2. Find the message with the subject **Company overview**. The message will be at the end of the message list. Use the ribbon to move the message to the **Media Information** folder that you created in the previous try-it activity.

3. Find the message with the subject **No-till blueberries**. The message will be at the end of the message list. Use the ribbon to move the message to the **Events** subfolder within the **Media Information** folder that you created in the previous try-it activity.

Try-it 2

In this try-it activity, you'll move messages with the commands on the context menu.

Resources

You will need the following resources for this try-it:

- The **Company overview** and **No-till blueberries** messages in the **L5_Inbox** folder
- The **Media Information** and **Events** folders that you created in the previous try-it activities

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L5_Inbox** folder.

2. Find the message with the subject **Company overview**. The message will be at the end of the message list. Use the context menu to move the message to the **Media Information** folder that you created in the previous try-it activity.

3. Find the message with the subject **No-till blueberries**. The message will be at the end of the message list. Use the context menu to move the message to the **Events** subfolder within the **Media Information** folder that you created in the previous try-it activity.

Wrap-up

Use these questions to check what you learned in this lesson:

1. Which of the following can you use to create a folder?

   Select all that apply.

   a. Commands on the **Home** tab

   b. Commands on the **Folders** tab

   c. The context menu

   d. Drag and drop

2. Which of the following can you use to move a message between folders?

   Select all that apply.

   a. Commands on the **Home** tab

   b. Commands on the **Folders** tab

   c. The context menu

   d. Drag and drop

3. When you're creating a folder, you must specify its name and _____.

   Fill in the blank space.

Lesson 6: Deleting and recovering messages

Overview

In this lesson you'll learn how to delete messages and recover messages from the **Deleted Items** folder. You'll also learn how to permanently remove messages from the **Deleted Items** folder. The activities, discussions, and demonstrations in this lesson will strengthen your learning and give you the opportunity to practice what you learn about deleting and recovering messages.

Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. What happens when you delete a message in Outlook?

    Select the correct option.

    a. It's permanently removed as soon as you delete it.

    b. It's moved to the **Deleted Items** folder.

    c. It's moved to the hidden **Recoverable Items** folder.

    d. It's moved to a .pst file.

2. How do you recover a message from the **Deleted Items** folder?

    Select the correct option.

    a. Move it to another folder.

    b. Use the **Recover Deleted Items** dialog box.

    c. Contact you email administrator.

    d. You cannot recover a message from the **Deleted Items** folder.

3. Deleted messages are permanently removed when you empty the _____ folder.

    Fill in the blank space.

4. In place of a **Deleted Items** folder, your account could have a folder named
    _____.

    Fill in the blank space.

Topic 1: Delete messages

The methods you've learned in this module can help you keep your mailbox organized. However, with new messages arriving all the time, you'll want to delete messages that you don't need anymore. There are several ways to delete a message in Outlook.

Delete a message

The first way you can delete a message is to select the message in the **mail** pane. Next, select the **Home** tab on the ribbon, and then in the **Delete** group, select **Delete**. The following screenshot depicts the **Delete** group, with **Delete** highlighted.
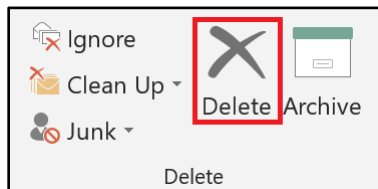
*Figure 56: The **Delete** group, with **Delete** highlighted.*

You can also delete a message using the message's context menu. Right-click or access the context menu for the message in the **mail** pane, and then select **Delete**. The following screenshot depicts the message context menu with **Delete** highlighted.

📋	C̲opy
🖨️	Q̲uick Print
✉️	R̲eply
✉️	Reply A̲ll
✉️	For̲ward
✉️	Mar̲k as Read
✉️	Mark as U̲nread
▦	Cat̲egorize ▸
🚩	Follow U̲p ▸
📄	F̲ind Related ▸
⚡	Q̲uick Steps ▸
📁	Rule̲s ▸
📁	Mo̲ve ▸
📁	I̲gnore
👤	J̲unk ▸
✕	D̲elete
🗄️	A̲rchive...
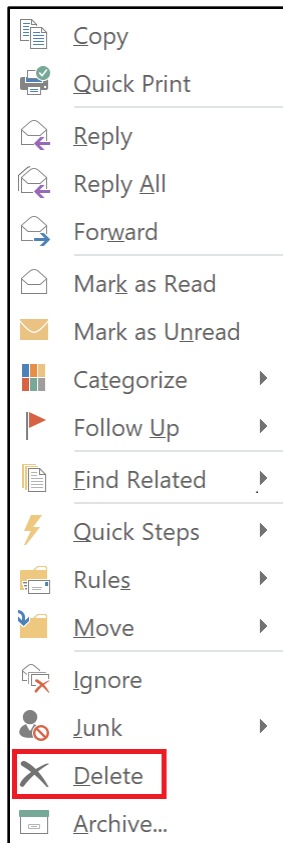
*Figure 57: The message context menu with **Delete** highlighted*
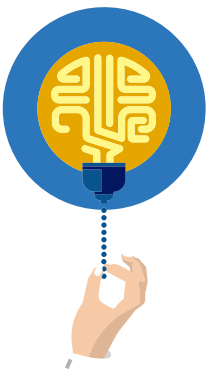
Did you know?

There are two more ways to delete messages. When you hover over a message, the **Delete the item** option displays. It's depicted as an **X** in the last column of the message list. Select the **Delete the item** icon to delete the message. You can also select a message, and then select the **Delete** key on your keyboard.

No matter which method you use to delete a message, it will be moved to the **Deleted Items** folder. However, you can still recover the message from here if you change your mind, as you'll learn in upcoming parts of this lesson.

Additional information

For more information on deleting messages, go to: Delete a message

Microsoft

Activity: Discuss and learn

In this activity, you'll discuss different ways to delete email messages.

Resources required

You will need the following resource for this activity:

- Messages in the **L6_Inbox** folder

Activity instructions

Participate in the activity by following these instructions:

1. Participate in the discussion led by the teacher.

2. Observe as the teacher demonstrates different ways to delete messages.

Try-it: Delete messages

In this standalone try-it, you'll practice multiple ways of deleting messages.

Resources

You will need the following resource for this try-it:

- Messages in the **L6_Inbox** folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L6_Inbox** folder.

2. Find the message with the subject **Time sheets**. Delete the message using the ribbon.

3. Find the message with the subject **Thank You**. Delete the message using the context menu.

4. Find the message with the subject **Information for the media**. Delete the message using the ribbon, the context menu, the **Delete the item** option, or the keyboard shortcut.

Microsoft

Topic 2: Empty deleted items

When you delete a message in Outlook, it's moved to a folder named **Deleted Items**. Much like the **Recycle Bin** in Windows, **Deleted Items** gives you the chance to recover deleted items before they are permanently removed. However, this folder can accumulate several messages, which could take up a lot of space on your computer or email server, especially if you have a lot of attachments with your messages.

Note: If your Outlook account is not connected to Microsoft Office 365, Outlook.com, or Microsoft Exchange Server, your deleted messages could be moved to a folder named **Trash** instead of **Deleted Items**.

To permanently remove these messages and free up space, you must empty the **Deleted Items** folder. To empty the **Deleted Items** folder, select the **Folder** tab on the ribbon, and then in the **Clean Up** group, select **Empty Folder**. This command is only available when the **Deleted Items** folder is selected. The following screenshot depicts the **Clean Up** group with **Empty Folder** highlighted.
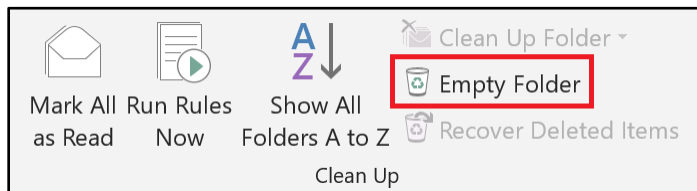
*Figure 58: The **Clean Up** group with **Empty Folder** highlighted*
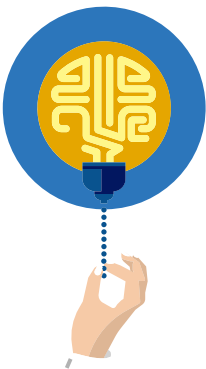
Did you know?

If you empty the **Deleted Items** folder, you cannot reverse this action or recover those messages, so think carefully before emptying this folder!

You can also empty the **Deleted Items** folder by using the context menu. Right-click or access the context menu for the **Deleted Items** folder, and then on the context menu, select **Empty Folder**, as in the following screenshot.
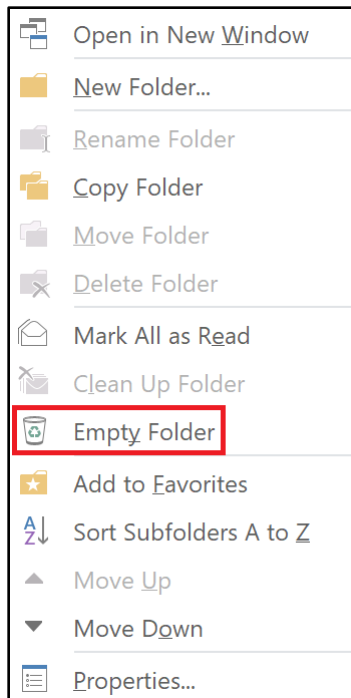
*Figure 59: The context menu for **Deleted Items** with **Empty Folder** highlighted*

Because the **Empty Folder** command permanently deletes everything in the **Deleted Items** folder, you will be prompted to confirm your decision. To permanently remove items in the **Deleted Items** folder, select **Yes**. To cancel the command and keep the items in **Deleted Items**, select **No**. The following screenshot depicts the confirmation dialog box.
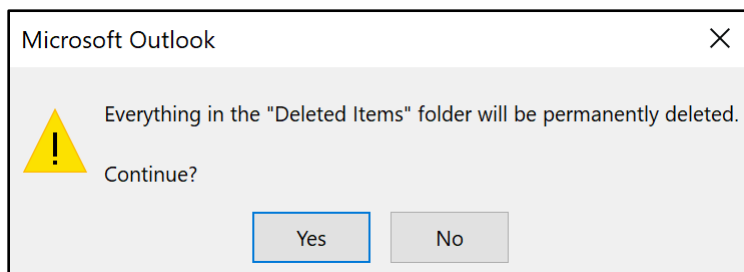
*Figure 60: The **Empty folder** confirmation box*
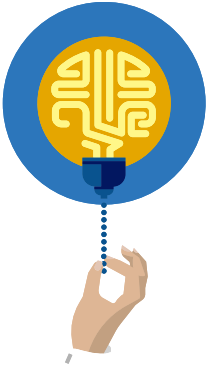
Did you know?

You can configure Outlook to automatically empty the **Deleted Items** folder. The setting for this is in **Outlook Options**.

Additional information

For more information on emptying deleted messages, go to: Empty the Deleted Items folder in Outlook

Activity: Discuss and learn

In this activity, you'll discuss the **Deleted Items** folder and permanently removing email messages.

Resources required

You will need the following resource for this activity:

- Messages in the **L6_Inbox** folder

Activity instructions

Participate in the activity by following these instructions:

1. Participate in the discussion led by the teacher.

2. Follow along as the teacher demonstrates emptying **Deleted Items**.

Try-it: Empty deleted messages

In this standalone try-it, you'll practice emptying the **Deleted Items** folder.

Resources

You will need the following resources for this try-it:

- None

Microsoft

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **Deleted Items** folder in **M3_module_PST_starter**.

2. Use the ribbon to empty the folder. Confirm the action when prompted.

3. Observe that there are now no messages in the **Deleted Items** folder.

4. Use the context menu to repeat the process.

Topic 3: Recover deleted items

If you accidentally delete a message or realize that you still need a message you deleted, you can recover it providing it's still in the **Deleted Items** folder. Deleted messages stay in the **Deleted Items** folder until it's emptied, either by you, or by Outlook if you have configured it to empty the folder automatically.

To review the **Deleted Items** folder contents, select **Deleted Items** in the **Folder Pane**. After you find the message you are searching for in the pane, move it to another folder, such as **Inbox**, using one of the methods you learned about in the previous lesson. The following screenshot depicts the **Folder Pane** with **Deleted Items** highlighted.
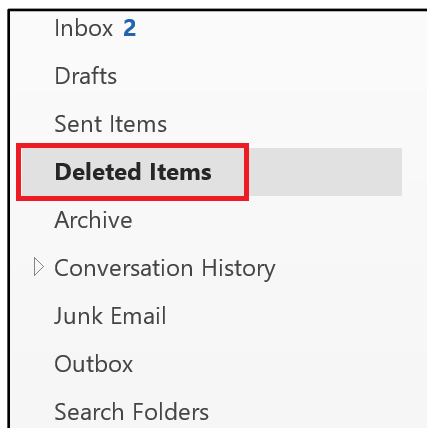
*Figure 61: The **Folder Pane** with **Deleted Items** highlighted*

But what happens if you've already emptied **Deleted Items**, or Outlook is configured to do it automatically? If you can't find the message in **Deleted Items**, is it gone forever? It might be, but there is still one place to check: **Recoverable Items**.

When messages are deleted from **Deleted Items**, they are moved to a folder named **Recoverable Items**. This is a hidden folder that acts as a temporary container for permanently deleted messages. It's not listed with the other folders in the **Folder Pane**, so you have to access it by using different commands.

Note: The **Recoverable Items** folder is not available for a .pst file, and is not available for accounts that have a **Trash** folder in place of **Deleted Items**. If your account doesn't offer the **Recoverable Items** feature, you won't be able to complete some of the activities in this topic. However, you can still learn how the feature works.

To recover an item from The **Recoverable Items** folder, select the **Home** tab on the ribbon, and then in the **Actions** group, select **Recover Deleted Items from the Server**, as in the following screenshot.
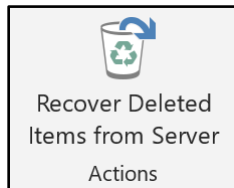
*Figure 62: The **Actions** group and **Recover Deleted Items from the Server***

You can also access this feature from **Deleted Items**. In the **Folder Pane**, select **Deleted Items**. Select the **Folder** tab on the ribbon, and then in the **Clean Up** group, select **Recover Deleted Items**. The following screenshot depicts the **Clean Up** group with **Recover Deleted Items** highlighted.
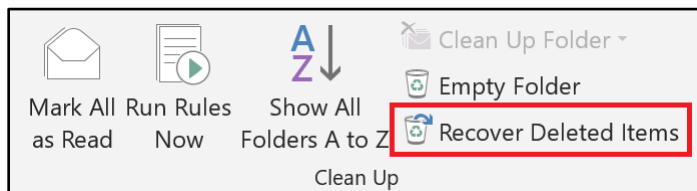
*Figure 63: The **Clean Up** group with **Recover Deleted Items** highlighted*

Selecting either command opens the **Recover Deleted Items** dialog box. Find and select the message you want to recover, and then be sure to select **Restore Selected Items**. Then select **OK**. The message or messages you selected will be moved back to their original folders. The following screenshot depicts the **Recover Deleted Items** dialog box with the option to **Restore Selected Items** highlighted.
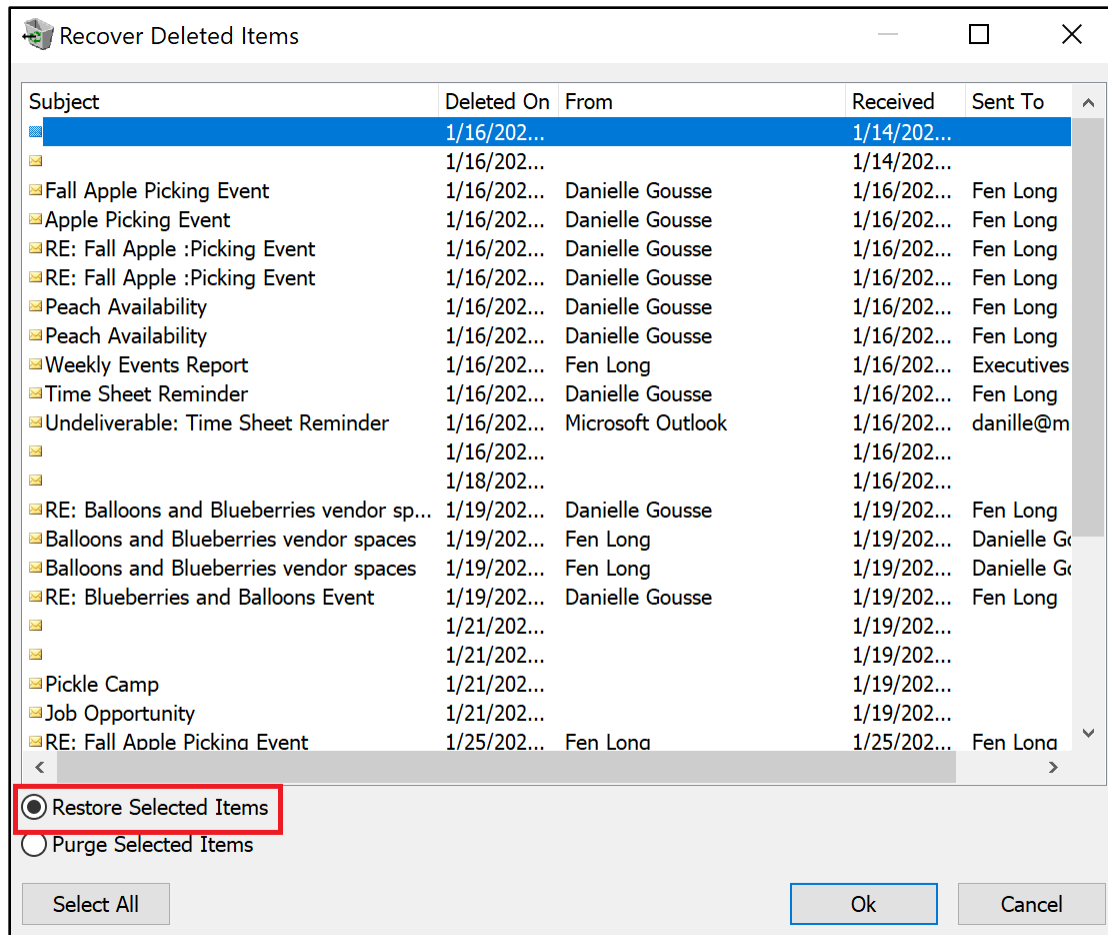
*Figure 64: The **Recover Deleted Items** dialog box with the option to **Restore Selected Items** highlighted*

Additional information

For more information on recovering deleted messages, go to: Recover deleted items in Outlook for Windows

Activity: Discuss and learn

In this activity, the group will discuss options for recovering deleted items in Outlook.

Resources required

You will need the following resource for this activity:

- Messages in the **L6_Inbox** folder

Activity instructions

Participate in the activity by following these instructions:

1. Participate in the discussion led by the teacher.

2. Observe as the teacher demonstrates options for recovering deleted items.

Try-it: Recover deleted items

In this standalone try-it, you'll practice deleting and recovering items.

Resources

You will need the following resources for this try-it:

• None

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the **L6_Inbox** folder.

2. Delete the message with the subject **Staff lunch on Friday?**

3. Delete the message with the subject **New equipment for the Festival**.

4. Navigate to the **Deleted Items** (or **Trash**) folder and move **Staff lunch on Friday?** back to **L6_Inbox**.

5. Empty the **Deleted Items** folder.

6. If Outlook is connected to an account that supports **Recoverable Items**, open the **Recover Deleted Items** dialog box, and recover one message. Go to the original folder to confirm that it's recovered. You can also use **Instant Search** to find the message.

Detach the module .pst file

After you complete all try-its, you must detach your .pst file so your teacher can assess your work. To do this:

1. In Outlook, on the **Navigation Bar**, select the ellipsis (**Navigation Menu** button), and then select **Folders**.

2. Locate the folder named **M3_module_PST_starter_ *Firstname_Lastname***, and right-click or access the context menu for the folder.

Microsoft

3. On the context menu, select **Close** "**M3_module_PST_starter_ Firstname_Lastname**."

4. On your computer, open **File Explorer**, and then browse to where the .pst file resides.

5. Right-click or access the context menu for the file, and then select **Rename**.

6. Append your name to the end of the existing file name by using underscores instead of spaces. For example, enter _**Firstname_Lastname**. The filename should now resemble **M3_module_PST_starter_Firstname_Lastname**.

7. Copy the .pst file to the designated location for assessment.

Wrap-up

Use these questions to check what you learned in this lesson:

1. Which of the following options is a hidden folder used to temporarily store deleted items?

   Select the correct option.

   a. **Deleted Items**

   b. **Drafts**

   c. **Recoverable Items**

   d. **Trash**

2. When are the contents of the **Deleted Items** folder removed?

   Select the correct option.

   a. When you empty the folder

   b. When you run **Clean Up Conversations**

   c. Once per year, on January 1

   d. Every day at noon

3. When the **Deleted Items** folder is emptied, messages are moved to _____.

   Fill in the blank space.

Glossary

Advanced Find	A tool for creating more advanced or complex searches than **Instant Search**.
Arrange By	The setting that determines which message field, such as **From** or **Date**, is used to arrange the message list in the **mail** pane.
Color categories	A set of color-coded tags that can be applied to a message to help keep messages organized.
Conversation	A group of messages that have the same subject.
Deleted Items	A folder that stores deleted messages.
Filter	A feature that reduces the number of messages listed in the **mail** pane by displaying only messages that meet specified criteria.
Focused Inbox	A feature that intelligently sorts **Inbox** messages into **Focused** or **Other** tabs to make the inbox more manageable.
Folder	A container for email messages that is used to organize mail into groups.
Follow Up Flag	A tag that can be applied to a message to indicate that further action is required.
Instant Search	A feature that searches messages based on a name, word, or phrase. Results are displayed in the **mail** pane.
Recoverable Items	A hidden folder that temporarily retains items that have been permanently deleted, such as when **Deleted Items** is emptied.
Search Folder	A virtual folder that groups together messages that meet specified criteria without moving messages from their original folders.
Sort	The setting that determines if messages in the **mail** pane are listed in ascending or descending order.

Table 3: Glossary terms and definitions

Microsoft

Cornerstone

Overview

In this cornerstone, you'll organize email messages related to one of Munson's Pickles and Preserve Farm's biggest and most popular events, the Blueberries and Balloons Festival. You'll utilize Outlook features to find and display messages efficiently. You'll clean up conversations to minimize duplication of emails. You'll need to use flags and categories to organize messages for the event, and you'll use Search Folders to keep related email together. Finally, you'll need to delete messages you no longer need, and make sure you haven't deleted anything you'll want later.

Objectives

The following table outlines the cornerstone objectives and their corresponding Microsoft Office Specialist (MOS) exam objectives.

Cornerstone project objectives	Exam objective(s)
Sort and filter messages.	• 2.3.1: Sort messages • 2.3.7: Change the display of messages
Manage conversations.	• 2.3.6: Ignore conversations
Flag and categorize messages.	• 2.3.5: Flag received messages
Search for and categorize messages.	• 1.3.2: Search for messages, calendar items, contacts, and tasks • 2.3.4: Categorize messages
Create Search Folders.	• 1.3.1: Create search folders
Create and use a folder.	• 2.3.2: Create folders • 2.3.3: Move messages between folders
Delete a message.	• None

Table 4: Cornerstone objectives

Duration

50 minutes

Attach the Cornerstone .pst file

To complete this Cornerstone, you must attach this .pst file into Outlook before you can perform any tasks. You'll also store the results of your tasks in this .pst file so that your teacher can assess your working by examining that file.

To open the .pst file in Outlook:

1. Open Outlook.

2. Select the **File** tab, and then select **Open & Export**.

3. In the **Open** pane, select **Open Outlook Data File**.

4. In the **Open Outlook Data File** dialog box, use the navigation pane to locate the .pst files provided by your instructor for your use throughout this module of the course.

5. Open the file named **M3_cornerstone_PST_starter**. Note that a folder **M3_cornerstone_PST_starter** is now available in the navigation pane. This folder contains any required starter elements for the Cornerstone, such as email, calendar appointments, tasks, and contacts.

6. Right-click or access the context menu for the **M3_cornerstone_PST_starter** folder, and then select **Data File Properties**.

7. In the **M3_cornerstone_PST_starter Properties** dialog box, select **Advanced**.

8. In the **Outlook Data File** dialog box, in the **Name** box, append your name to the end of the existing name by using underscores instead of spaces. For example, enter **_Firstname_Lastname**. The folder name should now resemble **M3_cornerstone_PST_starter_Firstname_Lastname**.

9. Select **OK** twice.

Instructions

1. Complete the following tasks for each file.

2. When you're done with the cornerstone, assess your completion and enter the points you think you earned within the following task lists. You can ask for the help of your teacher if required.

Microsoft

Tasks

You'll work with one file in this cornerstone. The following steps are the tasks you need to complete within each file.

File 1: M3_cornerstone_PST_starter.pst

Task: Sort and filter email (2 points)

1. Select **Inbox** and arrange the messages by date. (1 point) (Exam objective 2.3.1)

2. Change the filter to display **All Mail**. (1 point) (Exam objective 2.3.7)

Points scored: _____ / 2

Task: Manage conversations (4 points)

1. Enable **Show as Conversations** in the **Inbox**. (1 point)

2. Use the **Clean Up Conversation** command to clean up the **Honey sampling** conversation. (2 points)

3. Ignore the **Pickle Camp** conversation. (1 point) (Exam objective 2.3.6)

Points scored: _____ / 4

Task: Flag messages for follow up (2 points)

1. Find the message with the subject **In the field**. Set a flag to follow up next week. (1 point) (Exam objective 2.3.5)

2. Find the flagged message with the subject **New equipment for the Festival**. Mark the message as completed. (1 point) (Exam objective 2.3.5)

Points scored: _____ / 2

Task: Search for and categorize messages (3 points)

1. Search the **Inbox** for messages that contain the word **committee**. Apply a yellow color category to each message it finds. (2 points) (Exam objectives 1.3.2 and 2.3.4)

2. Name the yellow category **Planning Committee**. (1 point)

Points scored: _____ / 3

Microsoft

Task: Create Search Folders (3 points)

1. Create a **Search Folder** for messages that are flagged. (1 point) (Exam objective 1.3.1)

2. Create a **Search Folder** for all messages that contain the word **Blueberries**. (2 points) (Exam objective 1.3.1)

Points scored: _____ / 3

Task: Create and use a folder (3 points)

1. Create a folder named **Company Info** in **M3_cornerstone_PST_starter**. (1 point) (Exam objective 2.3.2)

2. Find the message with the subject **Staff images**, and move it to the **Company Info** folder. Find the message with the subject **Company overview**, and move it to the **Company Info** folder. (2 points) (Exam objective 2.3.3)

Points scored: _____ / 3

Task: Delete a message (1 point)

1. Delete the message with the subject **Daily Recap**. (0 points)

2. Delete the conversation with the subject **Personnel working on the cover crops**. (1 point)

Points scored: _____ / 1

FILE 1 TOTAL POINTS: _____ / 18

Detach the Cornerstone .pst file

After you complete all tasks, you must detach your .pst file so that your teacher can assess your work. To do this:

1. In Outlook, on the **Navigation Bar**, select the ellipsis (**Navigation Menu** button), and then select **Folders**.

2. Locate the folder named **M3_cornerstone_PST_starter_ *Firstname_Lastname***, and right-click or access the context menu for the folder.

3. On the context menu, select **Close** "**M3_cornerstone_PST_starter_ Firstname_Lastname"**.

4. On your computer, open **File Explorer**, and browse to where the .pst file resides.

5. Right-click or access the context menu for the file, and then select **Rename**.

6. Append your name to the end of the existing file name by using underscores instead of spaces. For example, enter _ ***Firstname_Lastname***. The filename should now resemble **M3_cornerstone_PST_starter_ *Firstname_Lastname***.

7. Copy the .pst file to the designated location for assessment.

Student Guide

40569A
Microsoft Outlook associate 2019

Module 4: Automating messages

Contents

Microsoft

Microsoft

Module overview

Description

Email is a great tool for communication; however, it can be taxing to manage large volumes of email. By automating a few processes, you can simplify email management and organization. Microsoft Outlook 2019 offers **Quick Steps**, **Quick Parts**, and rules to help manage your Outlook account. In this module, you'll learn about these options and use them to manage your email at Munson's Pickles and Preserves Farm. The following table outlines the lessons in this module and their corresponding learning objectives.

Lesson	Learning objective	Exam objective(s)
Using **Quick Steps** and **Quick Parts**	Create, run, and manage automated message processes.	Not mapped
Using rules to manage mail	Use rules to automatically manage messages.	Not mapped
Cornerstone: Automating email and tasks	Automate mail message workflows and processes.	Not mapped

Table 1: Objectives by lesson

Scenario

It's the end of the summer, and you've been working at Munson's Pickles and Preserves Farm for several months. Munson's has planned upcoming events and special activities that the Munson's Media and Communications department must coordinate. You're finding it difficult to manage your time to efficiently handle the communications related to the special events in addition to your daily communications responsibilities. To help you save time and focus on more creative project tasks, you need to automate as many email-management processes as possible. As the Media and Communications intern, you manage the team's email account. You need to create a system to keep up with the many emails, find related information, and create useful reminders.

Cornerstone

At the end of this module, you'll complete a Cornerstone project, which will put into practice the concepts you'll learn. You'll use Outlook **Quick Steps**, **Quick Parts**, and rules to automate your email management at the farm.

Lesson 1: Using Quick Steps and Quick Parts

Overview

When you're planning a major event, you might find yourself sending out repetitive messages and replying to many similar questions. You could copy and paste your message and responses, but Outlook offers two time-saving methods to help with these repetitive tasks. In this lesson, you'll learn how to use the **Quick Steps** and **Quick Parts** features to more efficiently manage email communication.

Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Which of the following is true about **Quick Steps**?

   Select the correct option.

   a. You can use **Quick Steps** to reply to and create a new email.

   b. You can only use **Quick Steps** to create a new email.

   c. You can only use **Quick Steps** to reply to an email.

   d. You can use **Quick Steps** with graphics.

2. Which of the following is true about **Quick Parts**?

   Select the correct option.

   a. **Quick Parts** offers the option to delete an email after replying to it.

   b. You can use **Quick Parts** to create an email to your team or manager.

   c. You can use **Quick Parts** to create a reusable block of text.

   d. **Quick Parts** offers the option to file an email within a folder.

3. Elise works in the admissions office of a local college answering emailed questions about the admissions process. She finds herself composing new emails with the same text frequently. You recommend that Elise use _____ to help Elise with her work.

   Fill in the blank space.

4. Place the following items in the correct order for creating a **Quick Step**.

   Indicate the correct sequence by adding numbers 1-4 next to the following items.

   a. **Create New** - _____

   b. **Home** - _____

   c. **Quick Steps** - _____

   d. **Add Action** - _____

Attach the module .pst file

To provide the most effective learning experience, this module includes several starter elements such as emails, calendar appointments, tasks, and contacts. These elements are stored in an external Outlook Data File, or .pst file. It resides in a location that your teacher will provide. To complete this module, you must attach this .pst file into Outlook before you can perform any try-its. You'll also store the results of your try-its in this .pst file. This allows your teacher to assess your work by examining the .pst file's contents.

To open the .pst file in Outlook:

1. Open **Outlook**.

2. Select the **File** tab, and then select **Open & Export**.

3. In the **Open** pane, select **Open Outlook Data File**.

4. In the **Open Outlook Data File** dialog box, use the **navigation** pane to locate the .pst files provided by your instructor for your use throughout this module of the course.

5. Open the file named **M4_module_PST_starter**. Note that a folder **M4_module_PST_starter** is now available in the **navigation** pane. This folder contains any required starter elements for the module, such as emails, calendar appointments, tasks, and contacts.

6. Right-click or access the context menu for the **M4_module_PST_starter** folder, and then select **Data File Properties**.

7. In the **M4_module_PST_starter Properties** dialog box, select **Advanced**.

8. In the **Outlook Data File** dialog box, in the **Name** box, append your name to the end of the existing name by using underscores instead of spaces. For example, enter **_Firstname_Lastname**. The folder name should now resemble **M4_module_PST_starter_Firstname_Lastname**.

9. Select **OK** twice.

Microsoft

Copy content into the module .pst file

As you proceed through this module's try-its, you should copy the resulting elements, such as emails, calendar appointments, tasks, and contacts, to the **M4_module_PST_starter_Firstname_Lastname** folder by using the following instructions:

1. After you attach the .pst file, you should be able to observe duplicate folders for items such as emails, calendar appointments, tasks, and contacts.

2. After you complete a try-it exercise, select your resulting items in the navigation pane. Make sure you select the items that are associated with your email account.

3. In the details pane, right-click or access the context menu for each item, and then select **Copy or** select Ctrl+C.

4. Select the **M4_module_PST_starter_Firstname_Lastname** folder.

5. Select Ctrl+V to copy the item to the .pst file.

6. Repeat steps 3 through 5 for any additional items that you want to copy.

Topic 1: Create and use a Quick Step

When reading your email, you might find yourself using the same processes over and over again. By using **Quick Steps**, you can define a process to complete these repetitive tasks and improve your efficiency.

For example, **Quick Steps** can be helpful when you're receiving many related emails and want to move them to a folder. In this module's scenario, you're receiving numerous emails concerning different events happening at the farm. You can create a Quick Step to file all the event-related emails into one folder.

Use a prebuilt Quick Step

To use a prebuilt **Quick Step**, perform the following steps:

1. Select the email message to which you wish to apply a **Quick Step**.

2. On the **Home** tab, locate the **Quick Steps** group.
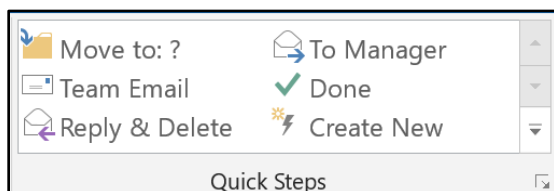
*Figure 1: **Quick Steps** group*

Microsoft

3. Select the **Quick Step** that you wish to apply to your chosen email, based on the following descriptions:

   o **Move to: ?**. Use this option to move the email to a chosen folder. The first time you use this option, you must define where to move the email. Outlook saves this action for future use, but you can choose to move different emails to any folder that you specify.

   o **Team Email**. Use this option to forward an email to the other members of your team. You can select those team members the first time that you use this option. You must name your team the first time that you access this feature.

   o **Reply & Delete**. Use this option to create a reply to the person who sent the email and then delete the email from your account.

   o **To Manager**. Use this option to forward a message to your manager. The first time that you use this option, you'll specify your manager.

   o **Done**. Use this option to move an email to the folder that you specify, mark the email as read, and mark the email as complete.

   o **Create New**. Use this option to create a new **Quick Step**.

Create a new email by using a Quick Step

By using **Quick Steps**, you can make it much easier and faster to send an email with a similar message to the same recipients multiple times.

1. On the **Home** tab, in the **Quick Steps** group, select **Create New**.
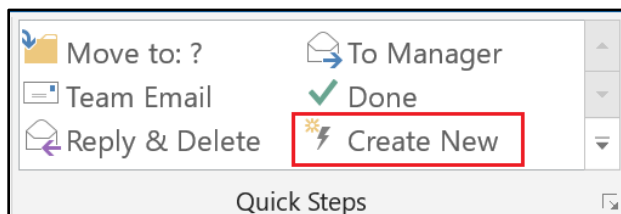
*Figure 2: **Quick Steps** group*

2. In the **Edit Quick Step** dialog box, in the **Name** box, enter a name for the **Quick Step** that you'll create.
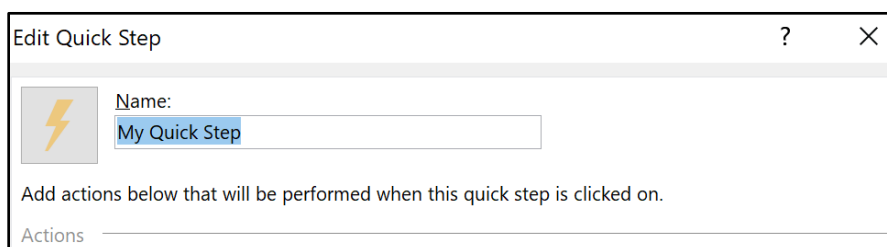
*Figure 3: **Edit Quick Step** dialog box*

Microsoft

3. Select the **Icon** option to assign an icon for your **Quick Step**.
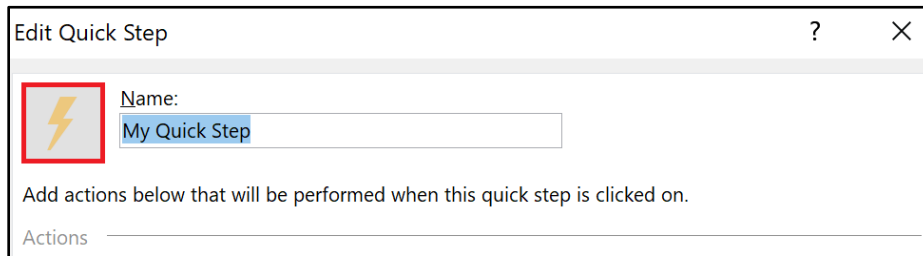
*Figure 4: **Icon** option*

4. In the **Actions** section of the **Edit Quick Step** dialog box, in the **Choose an Action** drop-down box, select an action for your **Quick Step**. In this case, to create a new email, select **New Message**.
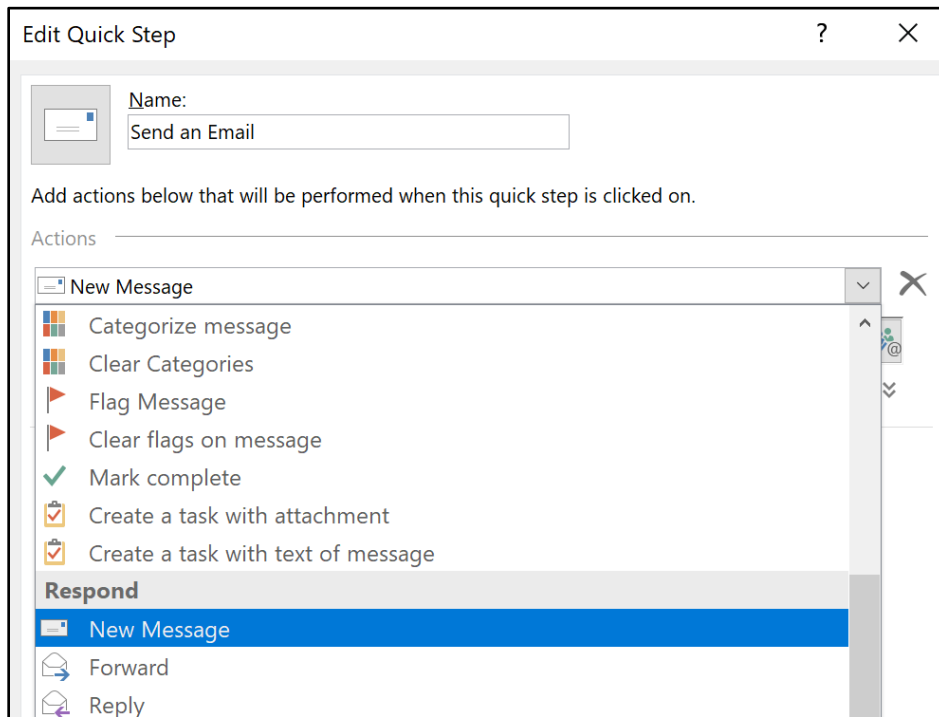
*Figure 5: **New Message** option*

5. Some actions will require more information, in which case a dialog box displays with options for you to enter this additional information. To create a new message, you must enter the email address in the **To** box, as the following screenshot depicts.
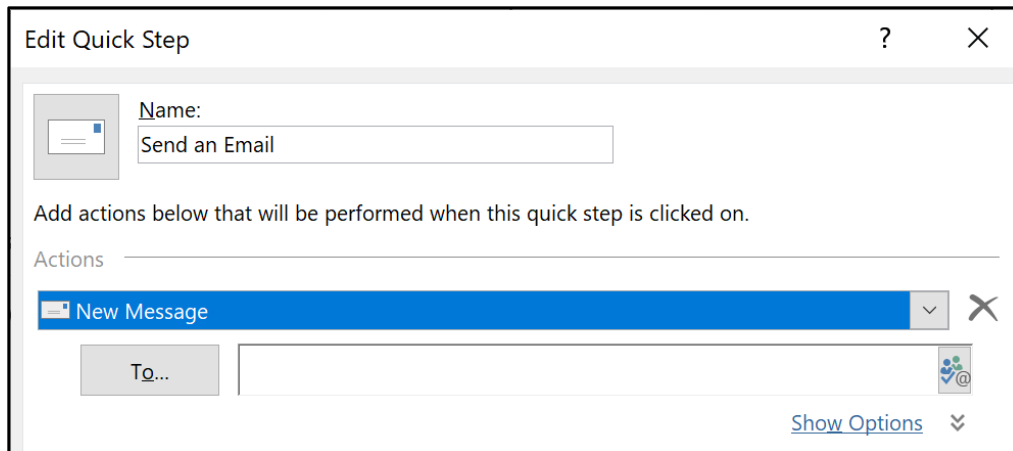
*Figure 6: The **To** box in the **New Message** action*

6. If you want to add the carbon copy (Cc), blind carbon copy (Bcc), and the text for your message to your email, select **Show Options**, which the following screenshot highlights.
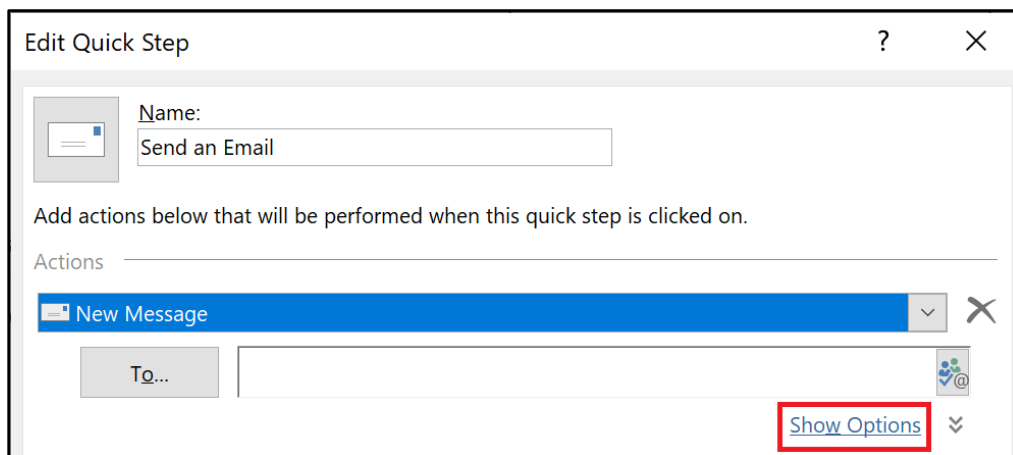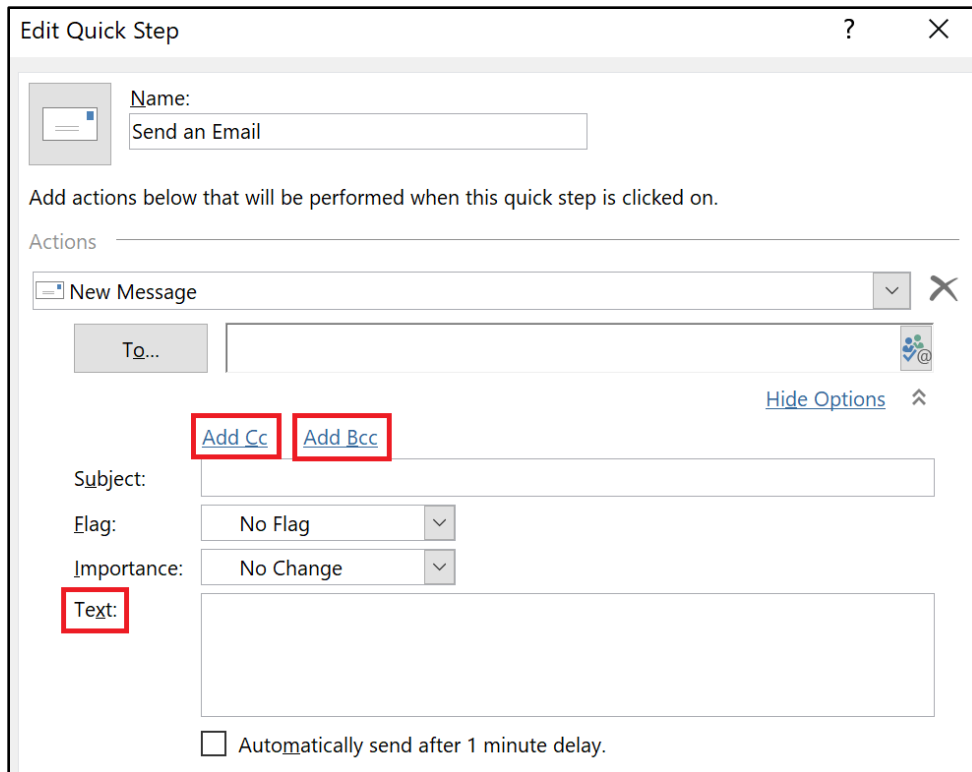
*Figure 7: **Show** Options*

7. The **Edit Quick Step** dialog box expands and displays additional options, including the **Add Cc** and **Add Bcc** options. In the **Text** box, you can enter the text that you want to use in the message each time that you send the email. After entering the information, select **Hide Options**.

Microsoft
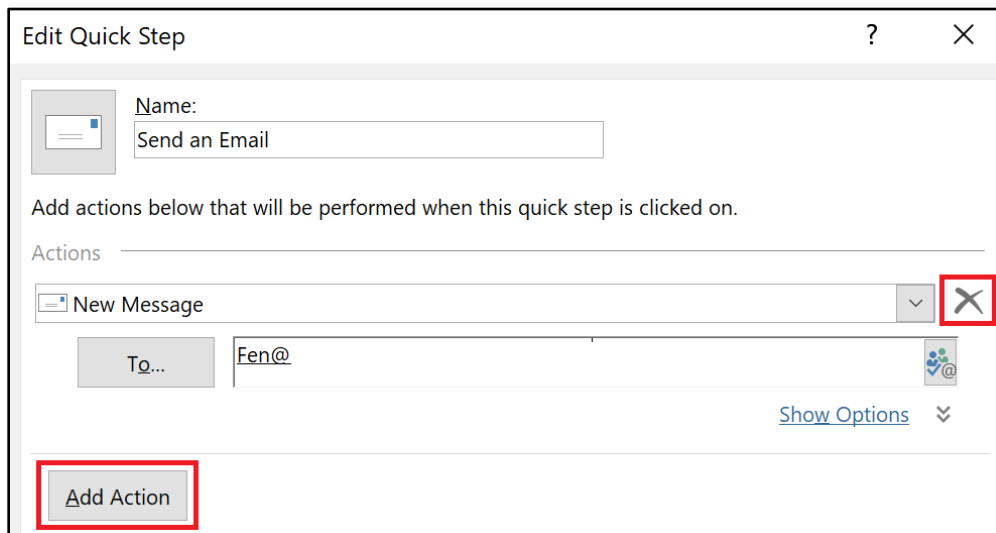
*Figure 8: **Add Cc**, **Add Bcc**, and **Text** options*

8. If you would like to delete an action, select the **Delete** icon. If you want to add an additional action for the **Quick Step**, select **Add Action**.

*Figure 9: **Delete** and **Add Action** options*

9. In the **Optional** section, you can create a shortcut key for your **Quick Step** and add tooltip text.

Figure 10: **Optional** section
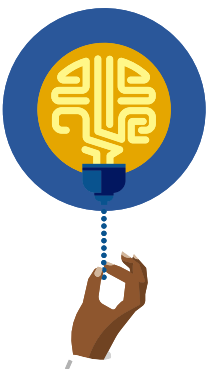
Did you know?

Tooltips are included in all the Office apps. Tooltips give the user more information about the option, before they select it. You can access this information by hovering over the option.

10. Select **Finish**. The **Quick Step** that you created now displays in the **Quick Steps** group.

Use a Quick Step

1. To use a **Quick Step**, on the **Home** tab, in the **Quick Steps** group, select **Quick Step**.

2. Enter the information for the email.

3. Select **Send**.

Manage a Quick Step

You might need to edit or delete a **Quick Step**. If your **Quick Step** needs modification, you might want to change it to do something different. For any of these actions, perform the following steps:

1. On the **Home** tab, in the **Quick Steps** group, select the dialog box launcher.
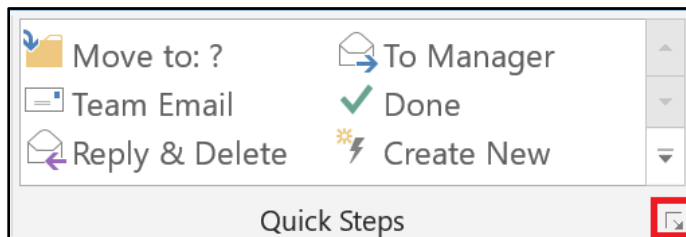
*Figure 11: **Quick Steps** dialog box launcher*

2. In the **Manage Quick Steps** dialog box, select the **Quick Step** that you want to manage.
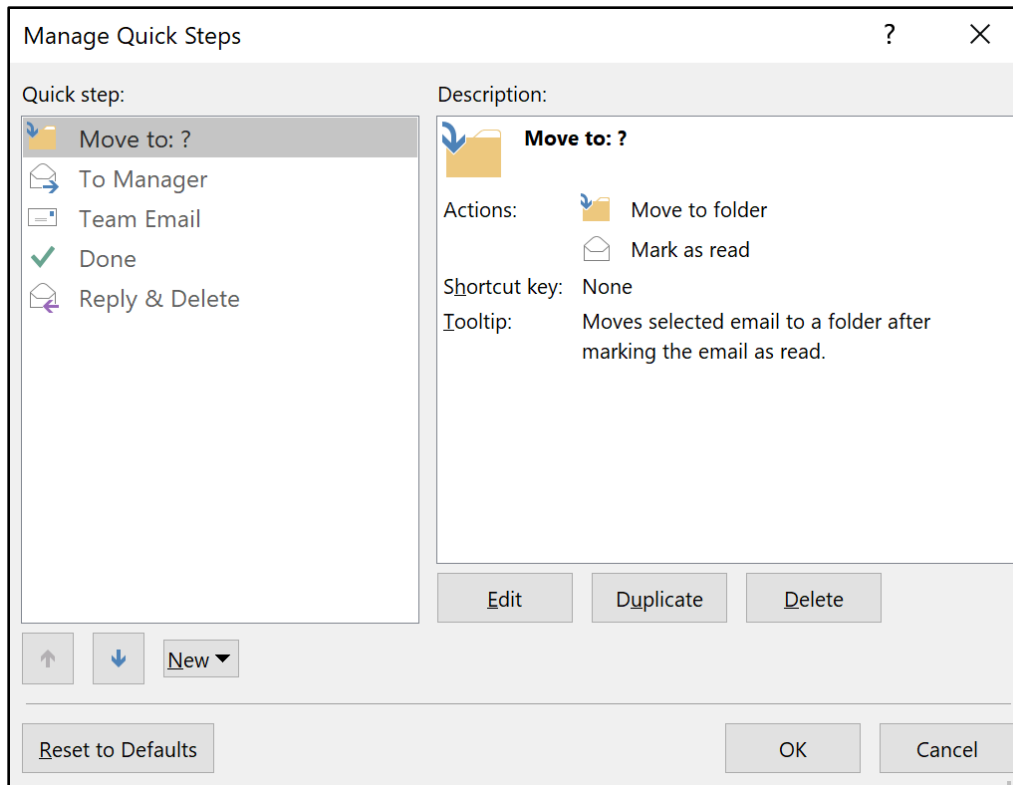
Figure 12: **Manage Quick Steps**

3. Select **Edit, Duplicate**, or **Delete**.

4. Selecting **Edit** will return you to the **Edit Quick Step** dialog box where changes to the Quick Step can be made.

5. Selecting **Duplicate** will make a copy of the **Quick Step** and return you to the **Edit Quick Step** dialog box where you can make changes to the **Quick Step**.

6. Selecting a **Quick Step** and selecting **Delete** will delete the **Quick Step**.

Additional information

To review more information on **Quick Steps**, go to: Automate common or repetitive tasks with Quick Steps

Activity: Guess and tell

How many steps do you think it would take to send an email to the Sales Team? The email needs to include the Sales Team in the **To** field and at least one individual in the **Cc** field, a subject line, a typed message, and an attachment. Record your guess.

Count the steps to send an email that meets the task requirements as your teacher performs the steps. Now, let's assume you are sending a similar email every day. How many steps would it take each month to send these similar emails?

Follow along as your teacher demonstrates how to create a **Quick Step** to respond to these emails in just one step.

Resources required

You'll need the following resources for this activity:

- Locate **L1_T1_act_daily_recap_starter.docx** in this lesson's Learning Activity Resources.

Activity instructions

Participate in the activity by following these instructions:

1. Create a **Quick Step** named **New Email** with the following actions:

   a. Email should be sent to the Sales Team.

   b. The email should be copied to another Munson's employee.

   c. The **Subject** line should read **Daily Recap**.

   d. The text in the message should be:

      Please find attached the daily recap of action items from yesterday.

2. Use the **Quick Step** to send the email, adding the **Daily Recap** document as an attachment.

How many steps did it take to send the email by using the **Quick Step**?

Try-it: Create and use a Quick Step

In this leveled try-it activity, you'll practice creating and using **Quick Steps**. You'll discover for yourself how the **Quick Step** feature saves you time and effort.

Try-it 1

Resources

You'll need the following resources for this try-it:

- Locate the email sent with **Fall Apple Picking Event** in the subject (go to the **Lesson 1** folder).

Instructions

The following are the general tasks that you must perform during this try-it:

1. Using a **Quick Step** named **Apple**, reply to and delete the message.

2. Use the following text for your reply: **Our Fall Apple Picking Events are held each Friday, Saturday, and Sunday, August through October, from noon to 6 p.m. We'll have Red Delicious, Golden Delicious, and Rome apples for $20 a bushel when you pick your own.**

3. From the **Sent** folder, copy the reply to **Fall Apple Picking Event** message to **M4_module_PST_starter_Firstname_Lastname**.

Try-it 2

Resources

You'll need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you must perform during this try-it:

1. Create a **Quick Step** to send a new email.

2. Use the name **Peaches** and the email address provided by your teacher.

3. Use the Subject: **Peach Availability**.

4. Enter the following for a message: **Could you please give me the dates for the availability of peaches? Thank you, Danielle Gousse**

5. From the **Sent** folder, copy the **Peach Availability** message to **M4_module_PST_starter_Firstname_Lastname**.

Try-it 3

Resources

You'll need the following resources for this try-it:

- Locate **L1_T1_try3_weekly_recap_starter.docx** in this lesson's Learning Activity Resources.

Microsoft

Instructions

The following are the general tasks that you must perform during this try-it:

1. In Outlook, go to **M4_module_PST_starter** folder and **Contacts**.

2. Select all items (three contacts and a group called Executives) and copy to your **Contacts** folder in your mailbox.

3. Create a **Quick Step**.

4. Name the **Quick Step Weekly Events Report**.

5. Add the action **New Message**.

6. Enter the **Executives** distribution list in the **To** box.

7. Add the **Cc** name and email address for **Marcos Serna**.

8. Use **Weekly Events Report** for the **Subject** box.

9. Enter the following message in the **Text** box:

   Please find attached our Weekly Events Recap. I hope this will be helpful during your end-of-the-week management meeting. If you need more information, please feel free to contact me, and I'll do my best to provide additional information.

10. Create a **Shortcut key** by using Ctrl+SHIFT+1.

11. Create an email by using the **Shortcut key**, and then attach the **L1_T1_try3_weekly_report.docx** to the email.

12. From the **Sent** folder, copy the **Weekly Events Report** message to **M4_module_PST_starter_Firstname_Lastname**.

Topic 2: Use Quick Parts

Quick Parts are another feature in Outlook that help you save time. You can use **Quick Parts** to create a block of text, a graphic, or a combination of both, and save them so that you can use them over and over. Using **Quick Parts** is easier and faster than using **Copy** and **Paste** because of the time and steps involved in using those options.

Create a Quick Part

To create a **Quick Part**, perform the following steps:

1. Open a new email message.

2. In the message body, enter the text and graphics that you want to use multiple times for an email.

Microsoft

3. Select the text and graphics.

4. On the **Insert** tab, in the **Text** group, select **Quick Parts**.
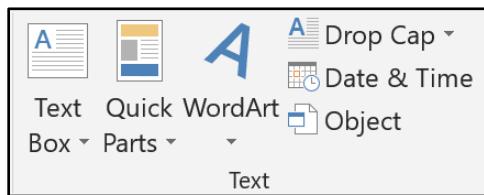
*Figure 13: **Text** group*

5. Select **Save Selection to Quick Part Gallery**.
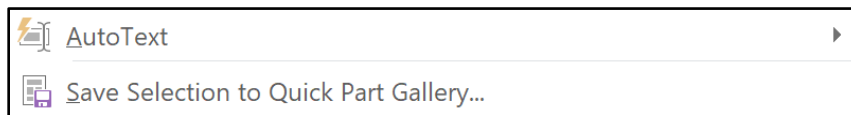
*Figure 14: **Quick Parts** options*

6. In the **Create New Building Block** dialog box, give your **Quick Part** a name, verify that the **Gallery** is **Quick Parts** and that the **Category** is **General**. You can provide a description if you like.

*Figure 15: **Create New Building Block** dialog box*

7. Select **OK**.

Microsoft

Use a Quick Part

To use a **Quick Part** that you've created, perform the following steps:

1. In a new email message or in an email message where you want to insert the **Quick Part**, on the **Insert** tab, in the **Text** group, select **Quick Parts**.

2. In the **General** dialog box, select the **Quick Part** that you wish to insert into your email.
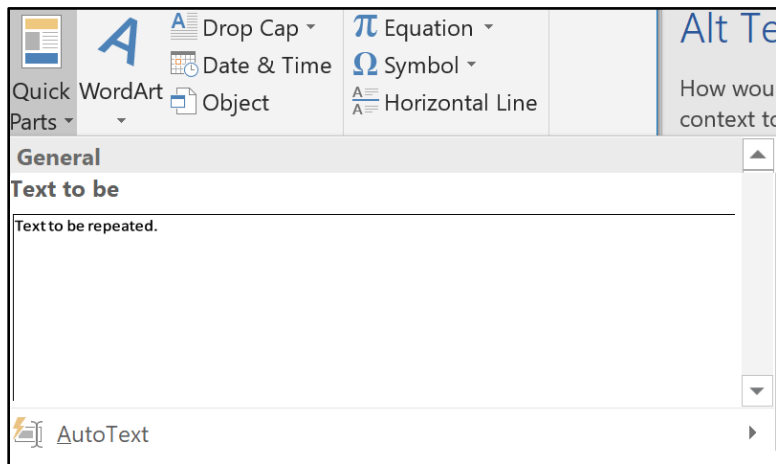
*Figure 16: **General** dialog box*

The **Quick Part** will be inserted into your email.

Manage a Quick Part

To edit the properties of a **Quick Part** or to delete it, perform the following steps:

1. On the **Insert** tab, in the **Text** group, select **Quick Parts**,

2. Right-click or access the context menu for the **Quick Part** that you wish to manage.

3. In the context menu, select **Edit Properties** to change the name of the **Quick Part** or **Organize and Delete** to delete the **Quick Part**.
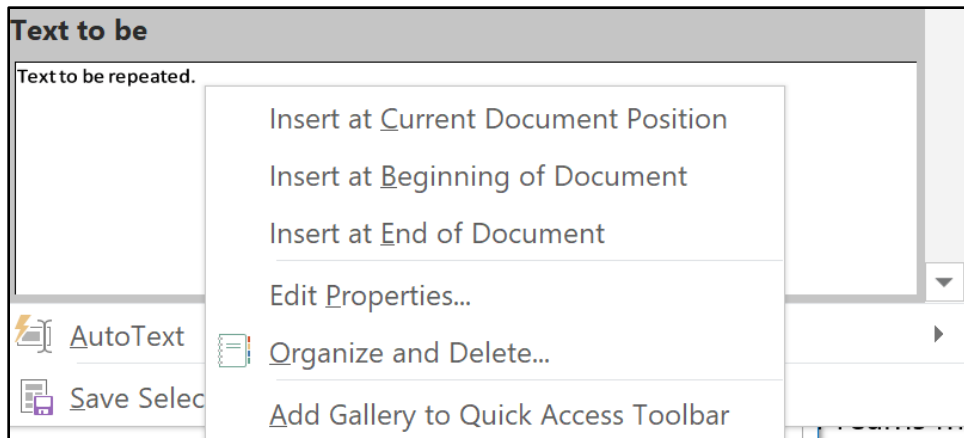
*Figure 17: Context menu for a **Quick Part***

4. Perform one of the following steps:

   a. If you're changing the name of a **Quick Part**, enter the new name in the **Name** box of the **Modify Building Block** dialog box, and then select **OK**.

   b. If you're deleting a **Quick Part**, verify that you've selected the correct **Quick Part** in the **Building Blocks Organizer**, select **Delete**, select **Yes** to confirm the deletion of the **Quick Part**, and then select **Close**.
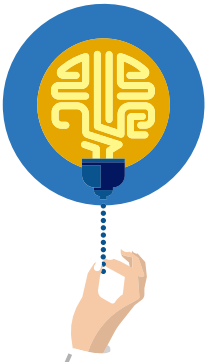
Did you know?

Did you know that you can also use **Quick Parts** in Microsoft Word? This **Did you know?** section was inserted using a **Quick Part** as well as the **Additional Information** link.

If you'd like to know more about using **Quick Parts** in Microsoft Word, go to: Use **Quick Part**s and AutoText in Word

Additional information

To review more information on **Quick Parts**, go to: Quick Parts

To review more information on creating reusable text blocks, go to: Create reusable text blocks for email messages

Microsoft

Activity: Switch

During this activity, you'll partner with one of your classmates. You'll create the **Quick Part** assigned to you by your teacher, and your partner will create the other **Quick Part**. After you've both completed your tasks, email your partner by using the **Quick Part** that you created.

You'll be creating a **Quick Part** to remind Munson's employees within your department to submit their timesheets. Your partner will create a **Quick Part** to remind employees within your department to submit their weekly status reports.

Resources required

You'll need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Pair up with a partner.

2. One partner should create a **Quick Part** by using the following text:

   Name: **Time Sheet**

   Please be sure to submit your time sheet by Wednesday this week so that the Payroll Department will be able to process your pay for the Friday payday. Time sheets are due by Wednesday at 5 p.m. Thank you for your cooperation.

   When sending this message, use the Subject: **Time Sheet Reminder**.

3. The other partner should create a **Quick Part** by using the following text:

   Name: **Status**

   Please remember to submit your weekly status report to me by the end of the day each Friday. I must submit a department status report each week on Tuesday, and I need your weekly status report to create our department report.

   When sending this message, use the Subject: **Weekly Status Report**.

4. Send an email to your partner by using the **Quick Part**.

5. From the **Sent** folder, copy the **Time Sheet** or **Status** message to **M4_module_PST_starter_Firstname_Lastname**.

Microsoft

Try-it: Use Quick Parts

In this leveled try-it activity, you'll practice creating and using **Quick Parts**. You'll discover for yourself how the **Quick Part** feature saves you time and effort.

Try-it 1

Resources

You'll need the following resources for this try-it:

- Locate the email with the subject line **Sales Projections**.

Instructions

The following are the general tasks that you must perform during this try-it:

1. Open the email and copy the text.

2. Create a **Quick Part** by using the message in the email.

3. Create a new message and insert the **Quick Part**.

4. Send the message to your teacher, using the Subject: **Try-It 1**.

5. From the **Sent** folder, copy the **Try-it 1** message to **M4_module_PST_starter_Firstname_Lastname**.

Try-it 2

Resources

You'll need the following resources for this try-it:

- The **Quick Part** that you created for **Sales**.
- **Munsons_logo_banner_large_illustration.png** in the **Media** folder under **Student Materials**.

Instructions

The following are the general tasks that you must perform during this try-it:

1. Create a new **Quick Part** and name it **Logo**. Use the text from the **Sales Quick Part** and add the **Munsons_logo_banner_large_illustration.png** to the **Quick Part**.

2. Resize the logo to fit the screen with the text under it.

3. Use the **Quick Part** to send an email to your teacher, using the Subject: **Try-it 2**.

Microsoft

4. Edit the properties of the **Logo Quick Part** and rename it **Sales Logo**.

5. Delete the **Time Sheet** and **Status Quick Parts**.

6. From the **Sent** folder, copy the **Try-it 2** message to
M4_module_PST_starter_Firstname_Lastname.

Wrap-up

Use these questions to check what you learned in this lesson:

1. Which of the following is true about **Quick Parts**?

Select the correct option.

   a. You can use **Quick Parts** with text and graphics.

   b. You can only use **Quick Parts** to reply to an email.

   c. **Quick Parts** are useful for forwarding email.

   d. All the above are true.

2. Which of the following is true about **Quick Steps**?

Select the correct option.

   a. You can use a **Quick Step** to include graphics in a block of text.

   b. **Quick Steps** offers a quick way to send repetitive messages to many different individuals.

   c. **Quick Steps** offers different options that you can perform on received email.

   d. None of the above are true.

3. Ivan is working to answer emails for a large business. He would like to find a way to quickly manage his incoming email. You suggest that Ivan try using _____ to help manage his incoming email.

Fill in the blank space.

4. Match the appropriate features to the tasks that follow.

   o **Quick Steps**
   o **Quick Parts**

   Categorize the following items by adding the appropriate feature next to each item.

   a. Includes five prebuilt options - _____

   b. Use for managing incoming email - _____

   c. Use to create reusable blocks of text - _____

   d. Offers the option to create a shortcut key - _____

Lesson 2: Using rules to manage mail

Overview

In Lesson 1, you learned how to quickly create repeating emails and reply to them. In this lesson, you'll learn about the Outlook rules, which you can use to create and apply rules to incoming email.

Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Which of the following is a true statement about rules?

    Select the correct option.

    a. You can create a rule and apply it to emails that you've already received.

    b. A rule will automatically sort email as you receive it.

    c. A rule will organize emails into folders.

    d. All above are true about rules.

2. When can a rule run?

    Select all that apply.

    a. A rule can only run automatically, and you cannot control it.

    b. A rule that you previously created will run automatically when you receive an email.

    c. You can only run a rule after you receive an email.

    d. You can run a rule any time you wish.

3. To edit a rule that you previously created, you must use the _____ option.

    Fill in the blank space.

4. Place the following selections in the correct order to create a rule.

   Indicate the correct sequence by adding numbers 1-4 next to the following items.

   a. **Create Rule** - _____

   b. **Home -** _____

   c. **Move** - _____

   d. **Rules** - _____

Topic 1: Create and run a rule

You can use Outlook rules to define a set of actions to perform when an email meets a set of criteria. This is another feature that can save time and make managing your workflow much easier. In this topic, you'll learn how to create and run rules.

Create a rule

There are two ways to start the process for creating a rule for email. You can either:

1. Select the email, and on the **Home** tab, in the **Move** group, select the **Rules** drop-down.
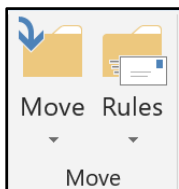
*Figure 18: **Move** group*

2. Select **Create Rule**.

*Figure 19: **Rules** menu*

Or

1. Right-click or access the context menu for an email, select **Rules**, and then select **Create Rule**.
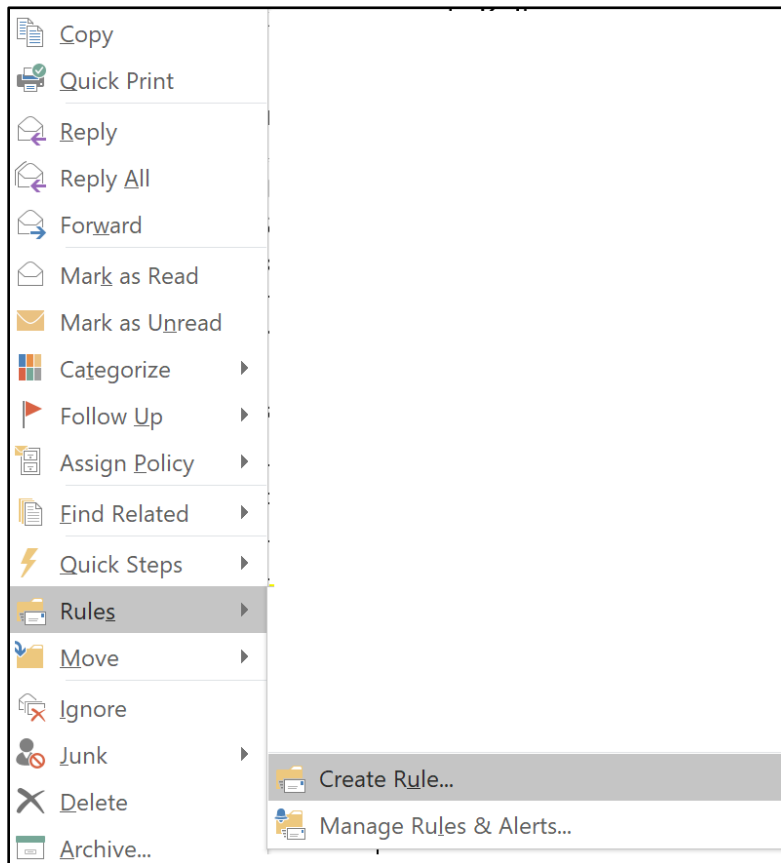
*Figure 20: **Email** context menu*

2. In the **Create Rule** dialog box, you can create a set of actions for email that meet a set of criteria.
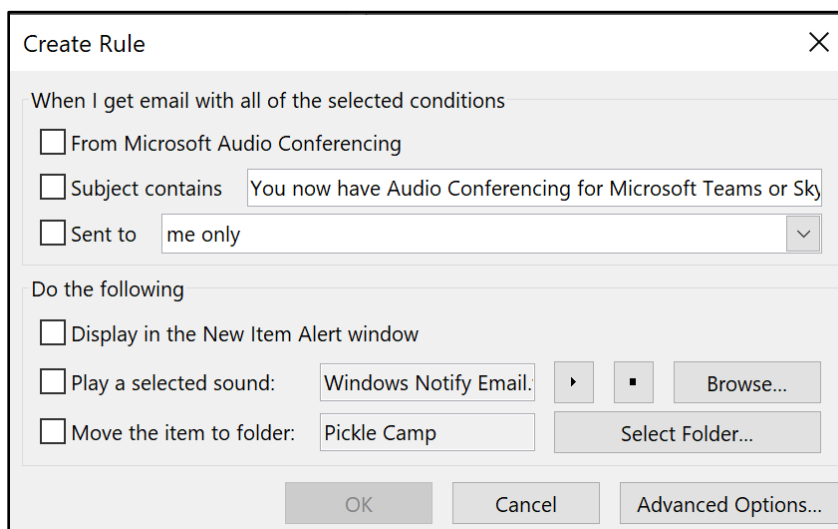
*Figure 21: **Create Rule** dialog box*

3. Select and make changes to the appropriate items in the **When I get email with all the selected conditions** section. The **From** check box displays the name of the person who sent you the email that you selected. The **Subject contains** box displays the subject of the email you selected, but you can edit this field.

4. Make selections and changes in the **Do the following** section. If you select the **Play a selected sound option** check box, you'll have to assign a sound by selecting **Browse**. If you select the **Move the item to folder** check box, you'll have to select the **Select Folder** option.

5. The **Rules and Alerts** dialog box displays in which you can choose a folder. If you need to create a new folder, you can do this by selecting **New**.
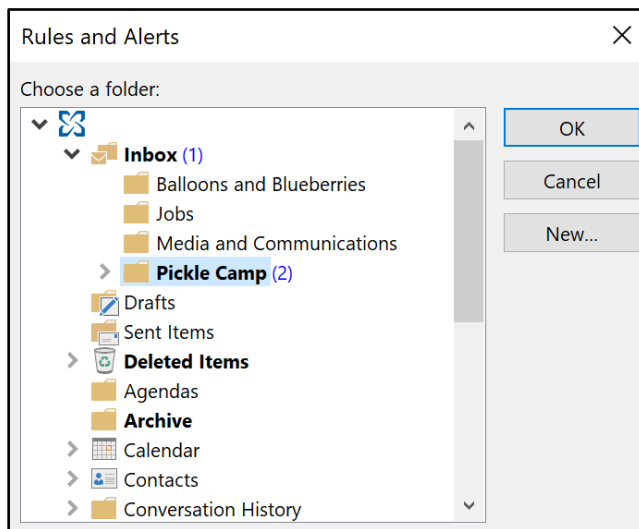
*Figure 22: **Rules and Alerts** dialog box*

6. Select **OK**.

Additional information

To review more information on email rules, go to: [Manage email messages by using rules](#)

Activity: Tell a story

In this activity, you'll use rules to separate out the email related to the Pick Your Own Strawberries event from other email.

Resources required

You'll need the following resources for this activity:

- Locate the **Pick Your Own Strawberries** email.

Activity instructions

Participate in the activity by following these instructions:

1. Create a rule to **Always move messages with the subject Pick Your Own Strawberries** to a **Strawberries** folder and have it display in the **New Item Alert** window. You'll need to create a new folder called **Strawberries**.

2. To test this rule, send the **Pick Your Own Strawberries** email to a partner. If the rule works, the email will be filed in the **Strawberries** folder. An Alert Window will appear to alert you that the message has been filed.

Try-it: Create and run a rule

In this leveled try-it activity, you'll practice creating a rule.

Try-it 1

Resources

You'll need the following resources for this try-it:

- You'll need a partner for this try-it.

Instructions

The following are the general tasks that you must perform during this try-it:

1. Create a rule to move any emails from your partner to a folder named for your partner.

2. After you've finished creating the rule, test the rule by having your partner send you an email.

Try-it 2

Resources

You'll need the following resources for this try-it:

- Locate the **Job Opportunity** email.

Instructions

The following are the general tasks that you must perform during this try-it:

1. Create a rule to **Always move messages with the subject Job Opportunity** to a folder named **Jobs** and display the message in the **New Item Alert** window.

2. After you've finished creating the rule, test the rule by having your partner send the **Job Opportunity** email to you.

Topic 2: Manage rules

In Topic 1, you learned how to create rules. In this topic, you'll learn how to manage rules by making a copy, modifying, and deleting rules.

Change a rule

To make changes to a rule, perform the following steps:

1. On the **Home** tab, in the **Move** group, select **Rules**, and then select **Manage Rules and Alerts**.

2. The **Rules and Alerts** dialog box displays the rules that you have created.

■■ Microsoft
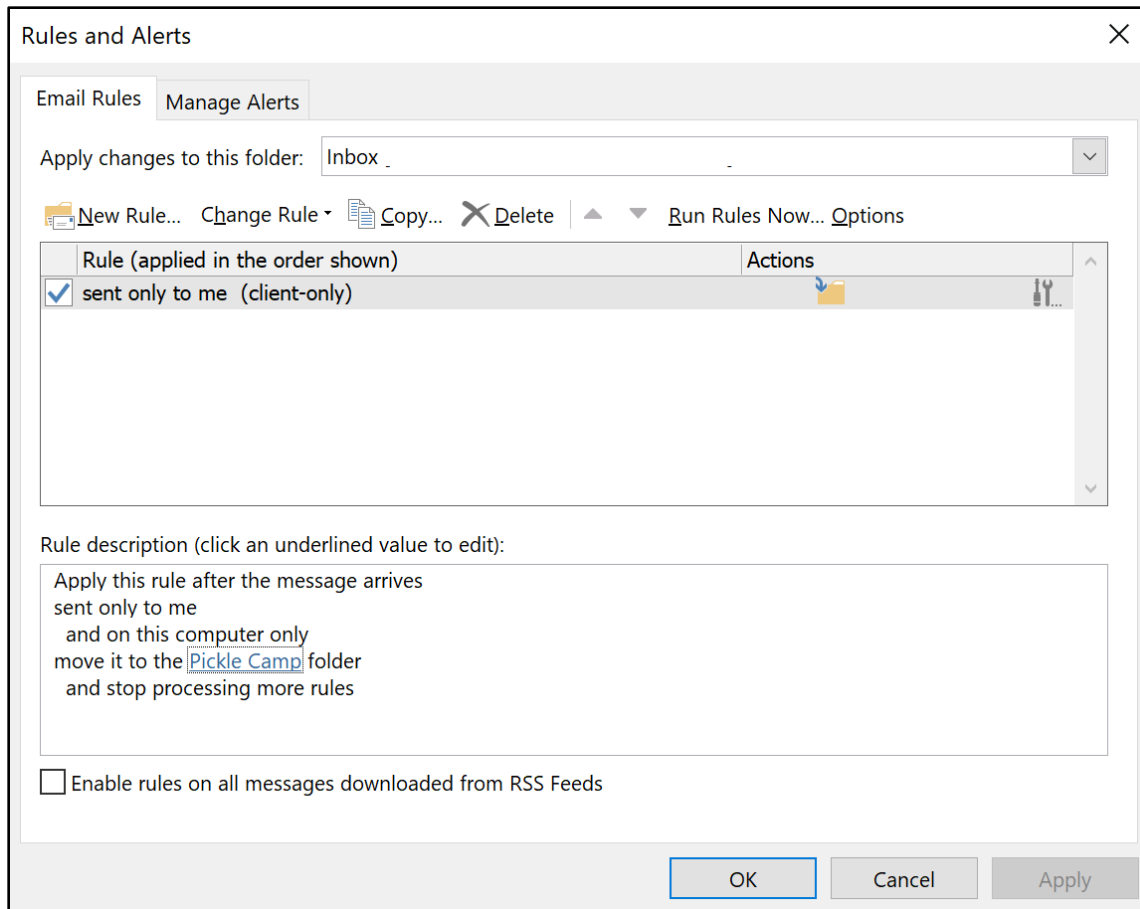
Figure 23: **Rules and Alerts** *dialog box*

3. Select the rule that you want to change, select **Change Rule**, and then select **Edit Rule Settings**.
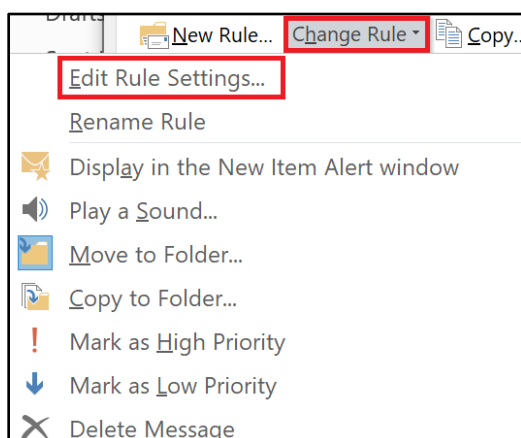
Figure 24: **Change Rule** *menu*

4. The **Rules Wizard** appears, in which you can make changes to the rule by using the four dialog boxes that the wizard takes you through. After you've made your changes on one dialog box, select **Next** or **Finish** on the last dialog box.
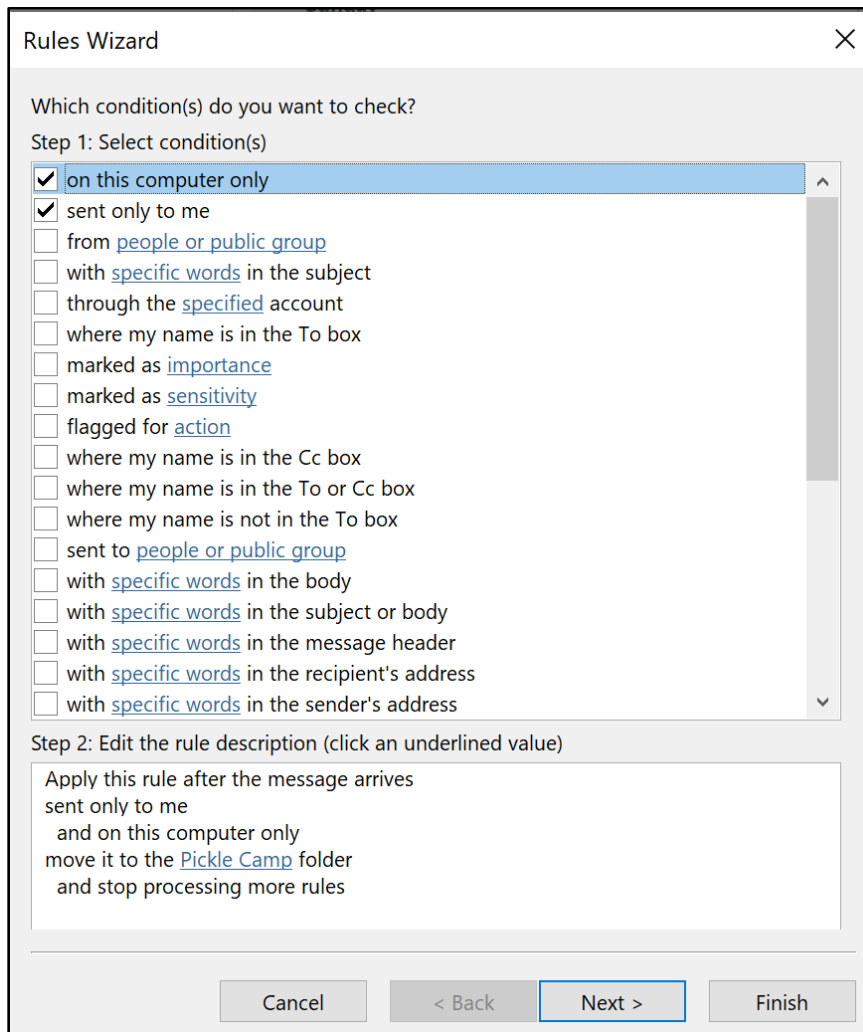
Figure 25: **Rules Wizard**

5. When you're making a change to a rule, you might need to provide more information. If you select the option in Step 2 of the Rules Wizard, you can enter the required information to create the rule. For example, the **from people or public group** option needs the names of the people or group. After you select this option, you can select the phrase in the Step 2 box to add the names or group in the dialog box.
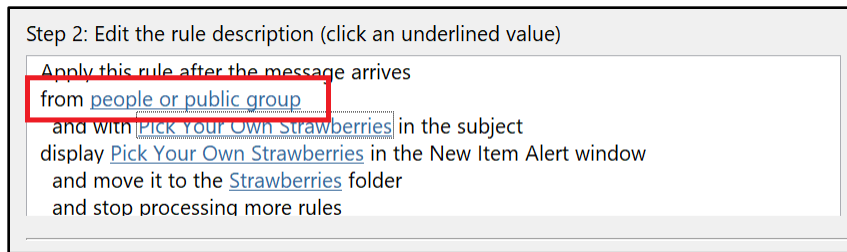
*Figure 26: Step 2 of the **Rules Wizard***

6. The **Rule Address** dialog box allows you to select the people or group.
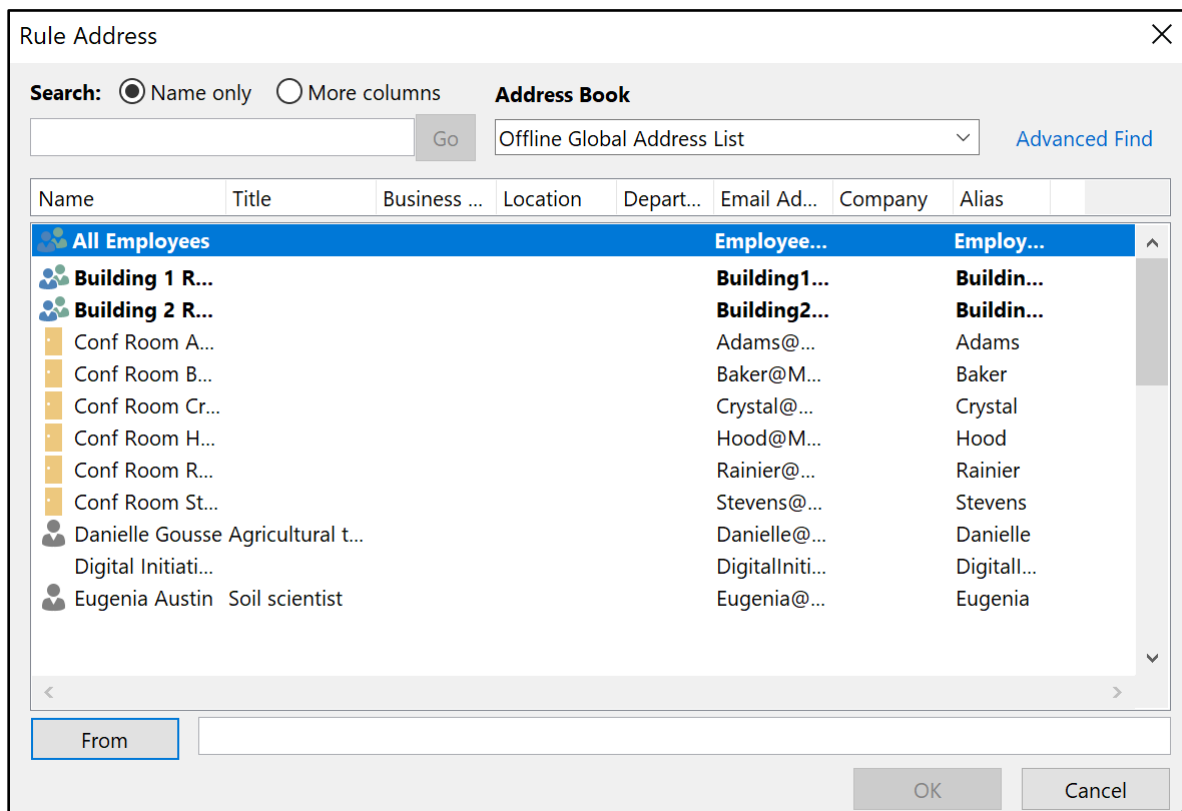
*Figure 27: **Rule Address** dialog box*

7. Select **Finish** after you've made all your changes.

8. Select **OK**.

Copy a rule

To copy a rule, perform the following steps:

1. On the **Home** tab, in the **Move** group, select **Rules**, and then select **Manage Rules and Alerts**.

2. The rules that you've created will display in the **Rules and Alerts** dialog box.

3. Select the rule that you want to change, and then select **Copy**.

4. In the **Copy rule to** dialog box, you can specify the folder to copy the rule to. By default, the rule is copied to the **Inbox** folder.
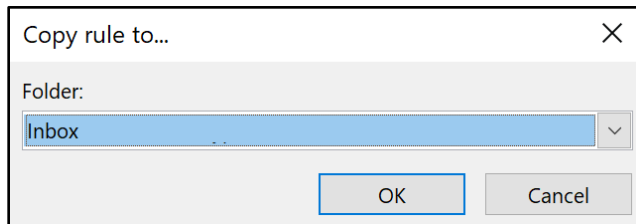
*Figure 28: **Copy rule to** dialog box*

5. Select **OK**.

Choose when to run a rule

By default, a rule runs when a message arrives. If you want to choose when to run a rule, you can perform the following steps:

1. On the **Home** tab, in the **Move** group, select **Rules**, and then select **Manage Rules & Alerts**.

2. The rules that you've created will display in the **Rules and Alerts** dialog box.

3. Select **Run Rules Now**.

4. In the **Run Rules Now** dialog box, you can choose one or multiple rules to run.
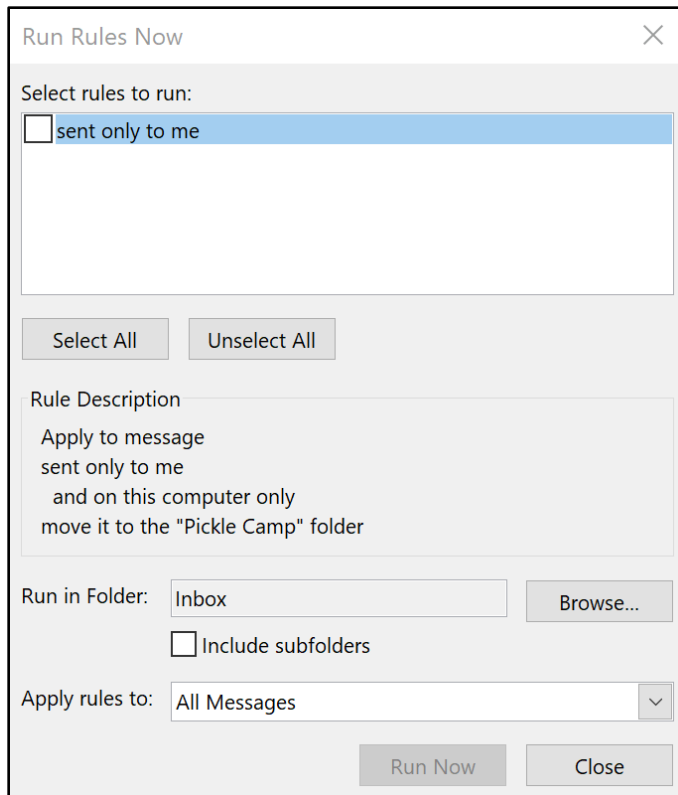
*Figure 29: **Run Rules Now** dialog box*

5. Select **Run Now**.

6. When you've finished running all the rules that you wish to run, select **Close**.

Delete a rule

To delete a rule, perform the following steps:

1. On the **Home** tab, in the **Move** group, select **Rules**, and then select **Manage Rules & Alerts**.

2. The rules that you've created will display in the **Rules and Alerts** dialog box.

3. Select the rule that you wish to delete, and then select **Delete**.

4. Confirm the deletion of the rule by selecting **Yes**.

Additional information

To review more information on editing a rule, go to: Edit an Outlook rule

Activity: Pose a challenge

In this activity, you'll following along as your teacher demonstrates the steps to manage a rule.

Resources required

You'll need the following resources for this activity:

- Open the **Pickle Camp** email.

Activity instructions

Participate in the activity by following these instructions:

Send the Pickle Camp email to your teacher, but don't use the subject **Pickle Camp**. Use something else in the subject line. After your teacher has received all the emails in their inbox, follow along as the teacher demonstrates, by performing the following steps:

1. Create a rule to file emails with the subject **Pickle Camp** in a folder called **Pickle Camp**.

2. Make a copy of the rule.

3. In the copy of the rule, clear the **with specific words in the subject** option.

4. Change the rule to search for the words **Pickle Camp** in the subject or the body of the message.

5. Run the new rule, called **Copy of Pickle Camp** now.

6. Delete the original rule.

Try-it: Manage rules

In this leveled try-it activity, you'll manage Outlook rules.

Try-it 1

Resources

You'll need the following resources for this try-it:

- Locate the **Job Opportunities** rule created in Topic 1 of this lesson.

Instructions

The following are the general tasks that you must perform during this try-it:

1. Run the **Job Opportunities** rule.

2. Make a copy of the **Job Opportunities** rule.

Try-it 2

Resources

You'll need the following resources for this try-it:

- Locate the **Pick Your Own Strawberries** rule created in Topic 1 of this lesson.

Instructions

The following are the general tasks that you must perform during this try-it:

1. Make a copy of the **Pick Your Own Strawberries** rule.

2. Change the copy of the rule by searching for **specific words in the body**.

3. Enter **information** as the specific word to search for in the body.

4. Delete the original rule.

Detach the module .pst file

After you complete all try-its, you must detach your .pst file so your teacher can assess your work. To do this:

1. In **Outlook**, on the **Navigation Bar**, select the ellipsis (**Navigation Menu** button), and then select **Folders**.

2. Locate the folder called **M4_module_PST_starter_Firstname_Lastname**, and right-click or access the context menu for the folder.

3. On the context menu, select **Close "M4_module_PST_starter_Firstname_Lastname"**.

4. On your computer, open **File Explorer**, and then go to the path where the .pst file resides.

5. Right-click or access the context menu for the file, and then select **Rename**.

6. Append your name to the end of the existing file name by using underscores instead of spaces. For example, enter **_Firstname_Lastname**. The filename should now resemble **M4_module_PST_starter_Firstname_Lastname**.

7. Copy the .pst file to the designated location for assessment.

Wrap-up

Use these questions to check what you learned in this lesson:

1. Which of the following are criteria that you can set for managing email by using rules?

   Select all that apply.

   a. Move to a folder

   b. Play a sound

   c. Create a reply

   d. Display in an Alert Window

2. Which of the following are options you can use to manage a rule?

   Select all that apply.

   a. Delete

   b. Change

   c. Run now

   d. Copy

3. To delete a rule, you must use the _____ option in the **Rules** group.

   Fill in the blank space.

4. Tina hopes to clean up her inbox. She has several emails concerning next month's grand opening. You suggest that Tina create a rule to move all email concerning the grand opening to a _____.

   Fill in the blank space.

5. Tina has several emails concerning next month's grand opening already in her inbox. You suggest that Tina use the _____ option to move these emails to the appropriate folder.

   Fill in the blank space.

Microsoft

Glossary

Bcc	Bcc stands for blind carbon copy and is used to conceal a recipient email address from the other recipients.
Cc	Cc stands for carbon copy and sends a copy of an email to another recipient.
Distribution list	A reusable list of two or more email addresses created within your contacts list, with an assigned name for the list.
Rule	A set of user-defined criteria to help manage email.
Quick Parts	A way to create a library of blocks of text to be used repeatedly. The block of text could include graphics. You can also use **Quick Parts** in Microsoft Word.
Quick Step	A set of user-defined criteria that you can apply to email messages.

Table 2: Glossary terms and definitions

Cornerstone

Overview

In this Cornerstone, you'll automate email message workflows and processes.

Objectives

The following table outlines the Cornerstone objectives and their corresponding MOS exam objectives.

Cornerstone project objectives	Exam OD
Create, run, and manage automated message processes	• Not mapped
Use rules to automatically manage messages	• Not mapped

Table 3: Cornerstone objectives

Duration

50 minutes

Attach the Cornerstone .pst file

To complete this Cornerstone, you must attach this .pst file into Outlook before you can perform any tasks. You'll also store the results of your tasks in this .pst file so that your teacher can assess your working by examining that file.

To open the .pst file in Outlook:

1. Open **Outlook**.

2. Select the **File** tab, and then select **Open & Export**.

3. In the **Open** pane, select **Open Outlook Data File**.

4. In the **Open Outlook Data File** dialog box, use the navigation pane to locate the .pst files provided by your instructor for your use throughout this module of the course.

5. Open the file named **M4_cornerstone_PST_starter**. Note that a folder **M4_cornerstone_PST_starter** is now available in the navigation pane. This folder contains any required starter elements for the Cornerstone, such as emails, calendar appointments, tasks, and contacts.

6. Right-click or access the context menu for the **M4_cornerstone_PST_starter** folder, and then select **Data File Properties**.

7. In the **M4_cornerstone_PST_starter Properties** dialog box, select **Advanced**.

8. In the **Outlook Data File** dialog box, in the **Name** box, append your name to the end of the existing name by using underscores instead of spaces. For example, enter _Firstname_Lastname. The folder name should now resemble **M4_cornerstone_PST_starter_Firstname_Lastname**.

9. Select **OK** twice.

Copy content into the Cornerstone .pst file

As you proceed through this Cornerstone's tasks, you should copy the resulting elements, such as emails, calendar appointments, tasks, and contacts, to the **M4_cornerstone_PST_starter_Firstname_Lastname** folder by using the following instructions:

1. After you attach the .pst file, you should be able to observe duplicate folders for items such as emails, calendar appointments, tasks, and contacts.

2. After you complete a try-it exercise, select your resulting items in the navigation pane. Make sure you select the items that are associated with your email account.

3. In the details pane, right-click or access the context menu for each item, and then, select **Copy or** select Ctrl+C.

4. Select the **M4_cornerstone_PST_starter_Firstname_Lastname** folder.

5. Select Ctrl+V to copy the item to the .pst file.

6. Repeat steps 3 through 5 for any additional items that you want to copy.

Instructions

1. Complete the following tasks.

2. When you're done with the Cornerstone, assess your completion and enter the points that you think you earned within the task lists. You can ask your teacher for help if required.

Tasks

In this Cornerstone, you'll manage emails by using Outlook and you'll work with one file. The following are the tasks you need to do within this file.

File – M4_cornerstone_PST_starter.pst

Task: Create and use a Quick Step (9 points)

1. Create a **Quick Step** to send out an email message named **Blueberries and Balloons Weekly**. (2 points)

2. Set the **Quick Step** to send a message to your teacher. (2 points)

3. Set the subject for the message as **Blueberries and Balloons vendor spaces**. (2 points)

4. Enter the following for the message text: **Time is running out to sign up for a vendor space at the 2020 Blueberries and Balloons Festival. The deadline to reserve a vendor space is May 15, 2020. Reserve your space before they're all gone!** (2 points)

5. Send the email by using the **Blueberries and Balloons Quick Step** to your teacher. (1 point)

6. From the **Sent** folder, copy the **Blueberries and Balloons vendor spaces** message to **M4_cornerstone_PST_starter_Firstname_Lastname**.

Points scored: _____ / 9

Microsoft

Task: Create a Quick Part (6 points)

1. Create a **Quick Part** with the following message: **Our Blueberries and Balloons Festival will be held Friday, June 26 through Sunday, June 28, 2020**, from noon to 8 p.m. each day at the Munson's farm. Plan to join us for three days of fun activities and try our delicious farm-grown food. Admission is free (with a small fee for pony and hot air balloon rides). You can find information about hotel accommodations on our website. You can also stay at our campground. Contact our campground manager for pricing and details. We hope you'll join us at the Blueberries and Balloons festival this June! (2 points)

2. Name the **Quick Part** as **BB Event** by using the default settings. (2 points)

3. Use the **BB Event Quick Part** to respond to the **Blueberries and Balloons Event** email. (2 points)

4. From the **Sent** folder, copy the reply to the **Blueberries and Balloons Event** message to **M4_cornerstone_PST_starter_Firstname_Lastname**.

Points scored: _____ / 6

Task: Create, edit, delete, and run a rule (8 points)

1. Create a rule to file any emails with the subject **Blueberries and Balloons** in a folder called **Blueberries and Balloons**. (3 points)

2. Copy the **Blueberries and Balloons** rule. (1 point)

3. Edit the copied **Blueberries and Balloons** rule so that if the email subject or the message body contain the words **Blueberries and Balloons**, the message is filed in the **Blueberries and Balloons** folder. (2 points)

4. Run the rule so that it will apply to any message in your inbox. (1 point)

5. Delete the original **Blueberries and Balloons** rule. (1 point)
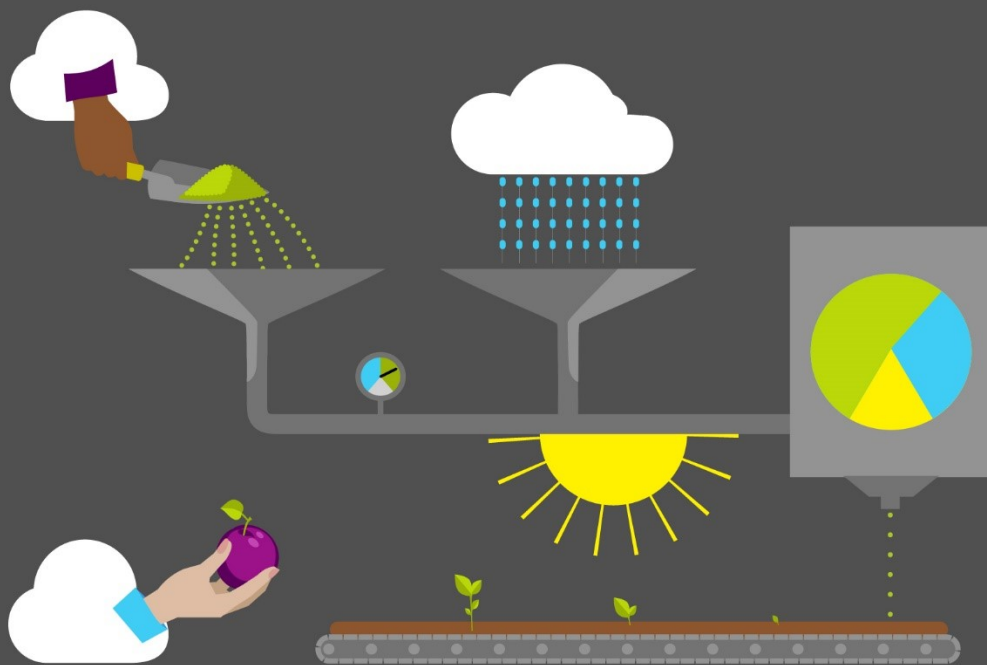
Points scored: _____ / 8

TOTAL POINTS: _____ / 23

Detach the Cornerstone .pst file

After you complete all tasks, you must detach your .pst file so that your teacher can assess your work. To do this:

1. In **Outlook**, on the **Navigation Bar**, select the ellipsis (**Navigation Menu** button), and then select **Folders**.

2. Locate the folder called **M4_cornerstone_PST_starter_Firstname_Lastname**, and right-click or access the context menu for the folder.

3. On the context menu, select **Close** "**M4_cornerstone_PST_starter_Firstname_Lastname**".

4. On your computer, open **File Explorer**, and go to the path where the .pst file resides.

5. Right-click or access the context menu for the file, and then select **Rename**.

6. Append your name to the end of the existing file name by using underscores instead of spaces. For example, enter **_Firstname_Lastname**. The filename should now resemble **M4_cornerstone_PST_starter_Firstname_Lastname**.

7. Copy the .pst file to the designated location for assessment.

Student Guide

40569A
Microsoft Outlook associate 2019

Module 5: Managing calendars

Contents

Microsoft

Microsoft

Module overview

Description

Microsoft Outlook 2019 provides an extensive array of features to help you send, receive, and manage email communication. However, Outlook is more than just an email app. You can also use it to help with your time management skills by scheduling appointments, events, and meetings, and customizing your calendar.

By the end of this module, you'll be able to use Outlook to manage appointments and events. You'll also be able to create and manage meetings and respond to or forward meeting requests. Finally, you'll be able to use the Outlook **Calendar** to manage your schedule and coordinate with others to help maintain structure in an otherwise busy work environment.

Video

Review the concept video to learn about using Outlook to organize your projects and manage your time more effectively.

The following table provides an outline of the specific lessons and learning objectives that are covered in this module.

Lesson	Learning objective	Exam objective(s)
Creating appointments and events	Use Outlook to create appointments, events, and recurring events.	• 3.1.1 • 3.2.1 • 3.2.4 • 3.2.6 • 3.3.2
Creating and managing meetings	Use Outlook to create new meetings, create meetings from messages, and update or cancel meetings.	• 3.2.2 • 3.2.3 • 3.2.4 • 3.2.5 • 3.2.6 • 3.3.3 • 3.3.5

Microsoft

Lesson	Learning objective	Exam objective(s)
Responding to meeting requests	Respond to or forward a meeting request.	• 3.3.1 • 3.3.2 • 3.3.4
Coordinating your schedule with others	Manage multiple calendars, share calendars, and create calendar groups.	• 1.1.1 • 3.1.2
Printing and sharing your availability	Print calendar information, send availability in a message, and create automatic replies.	• 1.4.1 • 1.1.3
Cornerstone: Managing and coordinating schedules	Create, respond to, and manage calendar appointments, meetings, and schedules.	• 1.1.1 • 1.1.3 • 1.4.1 • 3.1.1 • 3.1.2 • 3.2.1 • 3.2.2 • 3.2.3 • 3.2.4 • 3.2.5 • 3.2.6 • 3.3.1 • 3.3.2 • 3.3.3 • 3.3.4 • 3.3.5

Table 1: Objectives by lesson

Microsoft

Scenario

There's never a dull moment working as the Media and Communications department intern at Munson's Pickles and Preserves Farm! The Honey Fest is coming up soon and it will require quite a bit of planning. Several volunteers have already registered for their participation. Most of the farm employees will also be chipping in and helping with the fest. To manage everything smoothly, you'll have to track and manage everyone's schedules to avoid conflicts, and to plan tasks.

Cornerstone

This module concludes with a cornerstone project, in which you'll use the Outlook **Calendar** to manage appointments, events, and meetings. During the cornerstone, you will:

- Create appointments and events.
- Create and manage meetings.
- Manage multiple calendars.
- Share calendar details and availability.

Lesson 1: Creating appointments and events

Overview

As you progress through your busy day, it can become challenging to effectively manage your appointments and events. In addition to tracking your current appointments, you must also manage your recurring appointments. These might be weekly, monthly, or yearly, and you must set reminders for them. Fortunately, you can now use the Outlook **Calendar** to accomplish these tasks, instead of relying on paper calendars and appointment books. Just imagine the time, effort, and paper you end up saving!

In this lesson, you'll learn how to create basic appointments and events. You'll learn how to configure appointments and events as recurring items. You'll also learn how to set reminders to help you manage your current and future scheduling needs.

Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Which of the following options is an activity that has a start and end date and time, and does not involve inviting other people or resources?

   Select the correct option.

   a. **Event**

   b. **Appointment**

   c. **Meeting**

   d. **Session**

2. What do you call an activity that usually lasts 24 hours or more?

   Select the correct option.

   a. Event

   b. Appointment

   c. Meeting

   d. Session

3. When would you want to create a recurring appointment in the Outlook **Calendar**? _____

Fill in the blank space.

Attach the module .pst file

To provide the most effective learning experience, this module includes several starter elements such as email, calendar appointments, tasks, and contacts. These elements are stored in an external Outlook Data File, or .pst file. It resides in a location that your teacher will provide. To complete this module, you must attach this .pst file into Outlook before you can perform any try-its. You'll also store the results of your try-its in this .pst file. This allows your teacher to assess your work by examining the .pst file's contents.

To open the .pst file in Outlook:

1. Open Outlook.

2. Select the **File** tab, and then select **Open & Export**.

3. In the **Open** pane, select **Open Outlook Data File**.

4. In the **Open Outlook Data File** dialog box, use the navigation pane to locate the .pst files provided by your instructor for your use throughout this module of the course.

5. Open the file named **M5_module_PST_starter**. Note that a folder **M5_module_PST_starter** is now available in the navigation pane. This folder contains any required starter elements for the module, such as email, calendar appointments, tasks, and contacts.

6. Right-click or access the context menu for the **M5_module_PST_starter** folder, and then select **Data File Properties**.

7. In the **M5_module_PST_starter Properties** dialog box, select **Advanced**.

8. In the **Outlook Data File** dialog box, in the **Name** box, append your name to the end of the existing name by using underscores instead of spaces. For example, enter **_Firstname_Lastname**. The folder name should now resemble **M5_module_PST_starter_Firstname_Lastname**.

9. Select **OK** twice.

Copy content into the module .pst file

As you proceed through this module's try-its, you should copy the resulting elements, such as email, calendar appointments, tasks, and contacts, to the **M5_module_PST_starter_Firstname_Lastname** folder by using the following instructions:

1. After you attach the .pst file, you should be able to observe duplicate folders for items such as email, calendar appointments, tasks, and contacts.

2. After you complete a try-it exercise, select your resulting items in the navigation pane. Make sure you select the items that are associated with your email account.

3. In the details pane, right-click or access the context menu for each item, and then select **Copy or** select Ctrl+C.

4. Select the **M5_module_PST_starter_Firstname_Lastname** folder.

5. Select Ctrl+V to copy the item to the .pst file.

6. Repeat steps 3 through 5 for any additional items that you want to copy.

Topic 1: Create an appointment

An *appointment* refers to a scheduled activity in the Outlook **Calendar** that usually only pertains to the user. Creating an appointment doesn't involve inviting other people or reserving resources. For example, you might want to schedule a doctor's appointment for a specific date and time. You might also want to create an appointment to remind you of a final exam coming up in the next couple of weeks.

A typical appointment has a start time and an end time. You can configure it as a one-time appointment or as a recurring appointment. A recurring appointment is one that repeats multiple times, or on a regular scheduled basis.

Create appointments

Outlook provides several methods that you can use to create a new appointment. The most common methods include using the **New items** menu or navigating directly to the **Calendar** to create the appointment.

Use the New Items drop-down menu

The **New Items** drop-down menu is located on the **Home** tab of the Outlook ribbon. The primary benefit of using the **New Items** drop-down menu to create an appointment is that the menu is available in all Outlook workspaces. For example, if you're busy composing an email and need to quickly schedule an appointment, you don't have to switch workspaces to display the **Calendar**.

As the following screenshot depicts, the **New Items** menu provides a central location for you to create new items for all of Outlook's features. These include email messages, appointments, meetings, groups, contacts, and tasks, as in the following screenshot.
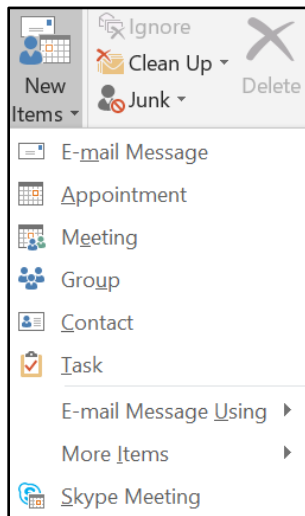
*Figure 1: **New Items** menu*

Use the Calendar

The Outlook **Calendar** is the place to go to review upcoming appointments and meetings. It's also most likely the place where you'll create your new appointments.

As discussed in *Module 1: Getting started with Outlook*, when you select the **Calendar** workspace, your first task is to determine which view is the most appropriate for your needs. The following screenshot depicts the **Calendar** with the **Day** view selected.

Microsoft
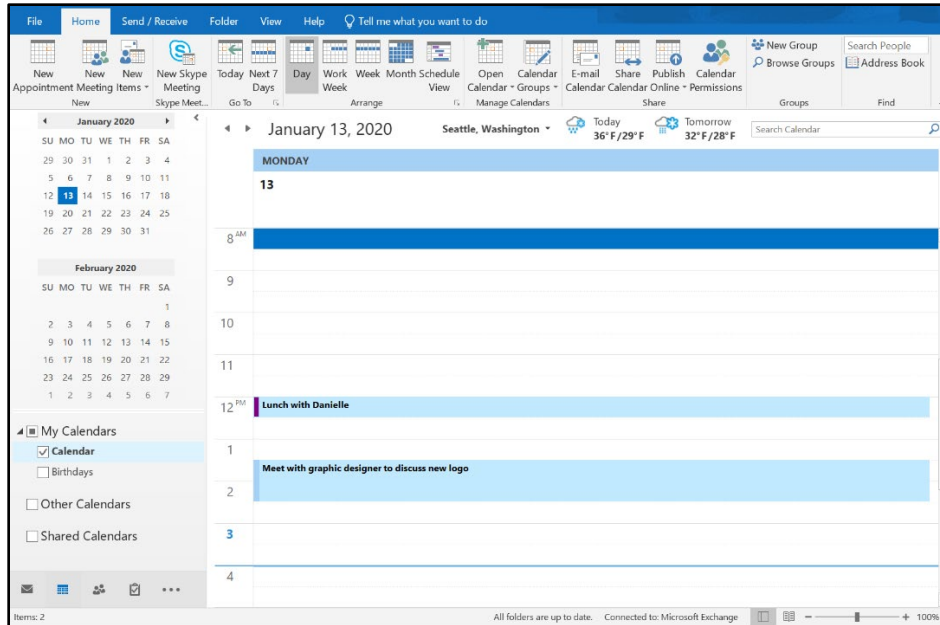
*Figure 2: Calendar workspace with **Day** view selected*

Notice that the **Calendar** contains half-hour increments for you to schedule your appointments. The **Work Week** and **Week** views also provide half-hour increments for displaying and scheduling appointments.
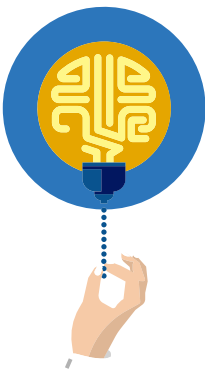
Did you know?

As previously discussed in *Module 1: Getting started with Outlook*, be sure to configure your **Work time** settings in **Outlook Options**. Remember that others can only schedule meetings with you during the days and hours you establish as your workdays. Times and days not included in the **Work time** settings display in your calendar as grayed-out time slots.

Microsoft

The following screenshot depicts the Work time settings that you can modify.
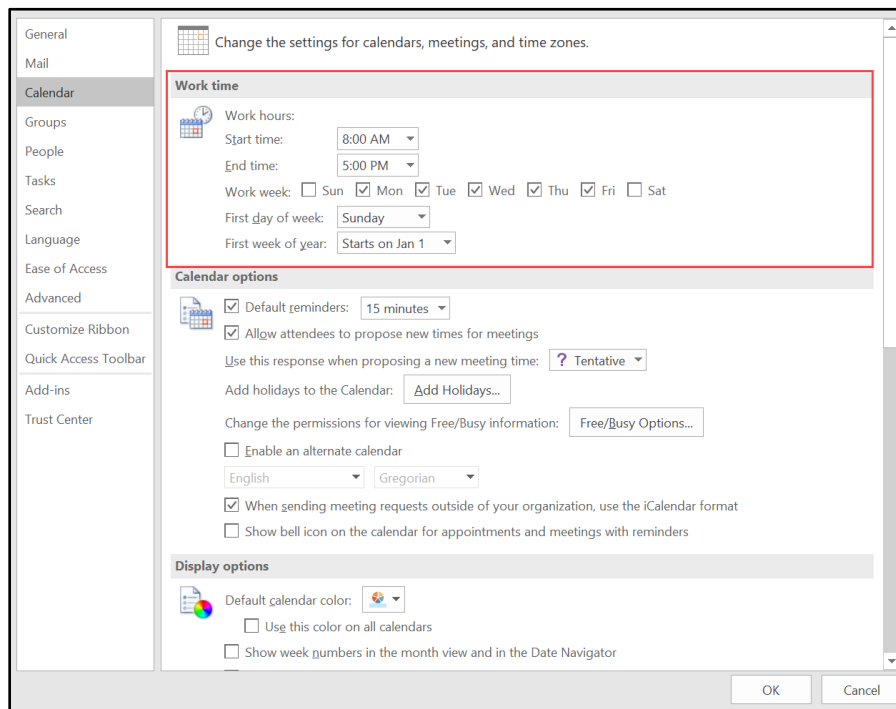
*Figure 3: **Work time** settings*

Enter a new appointment in the calendar

To create a simple appointment, select the intended time slot on the **Calendar** and enter the subject name of the appointment. When you select an appointment after creating it, a new **Appointment** tab displays on the ribbon, as in the following screenshot.
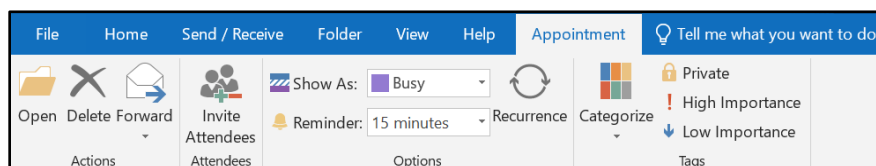
Figure 4: Appointment options

You can configure several additional settings for an appointment. The following groups on the **Appointment** tab contain these settings:

- **Actions**. In the **Actions** group, you can open the selected appointment, delete the appointment, or forward the appointment to an email recipient.
- **Attendees**. The **Attendees** group contains the **Invite Attendees** command. This essentially turns the appointment into a meeting and allows you to invite other people or assign resources to the item.

Microsoft

- **Options**. The **Options** group includes the following commands:
  - o **Show As**. You can use this command to specify whether the appointment should block time in your calendar to indicate unavailability for other potential meeting invites. You can select from **Free**, **Working Elsewhere**, **Tentative**, **Busy**, or **Out of Office**. By default, when you create a new simple appointment, the **Busy** indicator is assigned to it.
  - o **Reminder**. This command provides time periods to set a reminder related to the appointment. By default, a new simple appointment is configured with a 15-minute reminder to appear before the appointment start time.
  - o **Recurrence**. This command specifies a setting to indicate that the appointment is a recurring item which repeats daily, weekly, monthly, or yearly.
- **Tags**. The **Tags** group contains the following commands:
  - o **Categorize**. This command organizes Outlook items into color-coded categories.
  - o **Private**. You can select this tag to mark the item as private, so others can't observe the details of the appointment if they have shared access to your **Calendar**.
  - o **High Importance**. You can select this tag to mark the item with a high importance indicator for your reference.
  - o **Low Importance**. You can select this tag to mark the item with a low importance indicator for your reference.
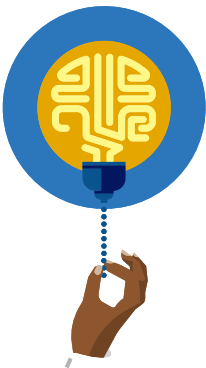
Did you know?

If you need to schedule an appointment for more than the 30-minute time slot, you can simply select and drag the cursor to highlight the desired start and end time. You can also hold the Shift key on the keyboard and select the end time to schedule a larger appointment duration.

Use the New Appointment command

Another method you can use to create a new appointment in the **Calendar** is to select the **New Appointment** command. You can use this method when you input additional information, such as the location and specific start and end time periods. You can also use this method if you want to configure an event use the **Scheduling Assistant** to assist in inviting additional attendees, or if you need to configure an online meeting by using Skype or Microsoft Teams. As the following screenshot depicts, the **New Appointment** command opens the **Appointment** window, where you can customize advanced options for the appointment.

Microsoft
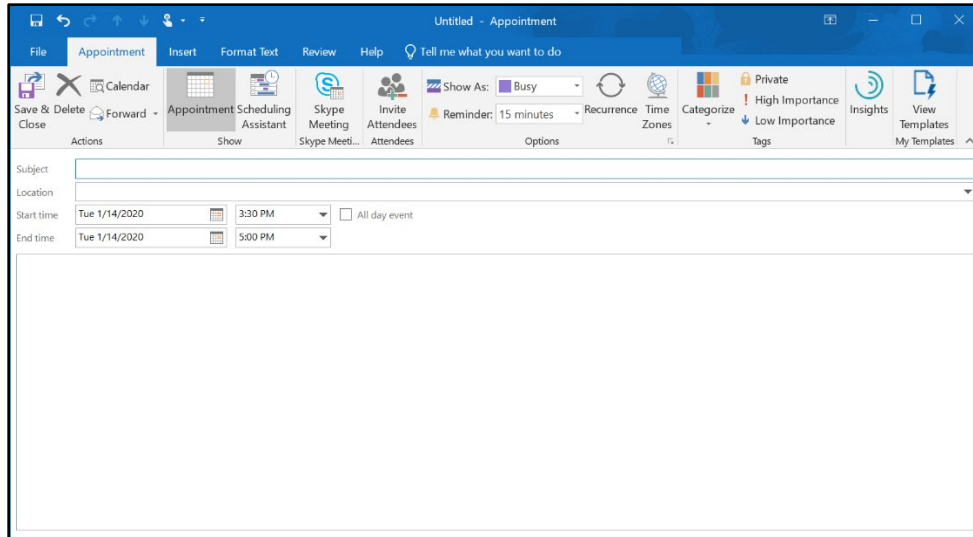
*Figure 5: **Appointment** window*

Create an appointment from an email message

At times, you might receive an email message that results in creating an appointment. For example, a work associate might send you an email to invite you to lunch. You can simply select the email item in the inbox, and then use the **Move** command on the ribbon to move or copy the email item to the **Calendar**. An **Appointment** dialog box opens with details such as the **Subject**, **Start** and **End** times, **Show As** setting to **Busy**, and a 15-minute reminder. The appointment will also include details of the email message as an attachment or in the memo area, depending on whether you move or copy the message.
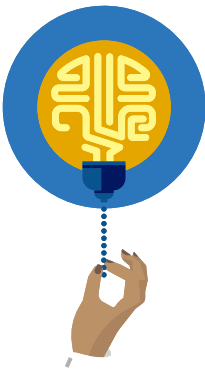
Did you know?

If you choose to move an email message to the **Calendar**, the email item is attached to the appointment and removed from the inbox. If you choose to copy an email from the inbox, the message content is added to the memo area of the appointment.

Video

To review the video on creating appointments, go to: [Create appointments and meetings](#)

Activity: Show and tell

In this activity, your teacher will demonstrate ways to create a new appointment and configure appointment options in the Outlook **Calendar**.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Pay close attention as your teacher demonstrates the following tasks:

1. Review **Outlook Options** for the **Calendar**.

2. Create a new appointment by entering it in the **Calendar**.

3. Create a new appointment by using the **New Appointment** command.

4. Configure options for appointments.

Try-it: Create an appointment

In this leveled try-it activity, you'll verify Outlook settings, create new appointments, and configure appointment options in the Outlook **Calendar**.

Try-it 1

Resources

You will need to open and configure the following resources for this try-it:

1. Open **M5_module_PST_starter** in this module's **Learning Activity Resources** folder. You'll complete all tasks within this Outlook Data File.

2. On the **Calendar** workspace, in the **Folder Pane**, select the **Calendar – M5_module_PST_starter** check box.

3. To display only the course-related calendar, clear the check box next to the default calendar in Outlook.

Instructions

The following steps are the general tasks that you need to perform during this try-it:

- Open the **Outlook Options** dialog box, and verify that the **Calendar** settings are configured as follows:
  - o Work hours: **8:00 AM** to **5:00 PM**
  - o Work week: **Monday** to **Friday**
  - o First day of the week: **Sunday**

Try-it 2

Resources

You will need to open and configure the following resources for this try-it:

1. Open **M5_module_PST_starter** in this module's **Learning Activity Resources** folder. You'll complete all tasks within this Outlook Data File.

2. On the **Calendar** workspace, in the **Folder Pane**, select the **Calendar – M5_module_PST_starter** check box.

3. To display only the course-related calendar, clear the check box next to the default calendar in Outlook.

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. In the **Module 5 Calendar**, select the intended date and time and then enter a new appointment with the following information:

   - o Date: **Use tomorrow's date**
   - o Time: **11:00 AM**
   - o Subject: **Pick up Munson's event flyers from printer**
2. In the **Module 5 Calendar**, use the **New Appointment** command to create a new appointment with the following information:

   - o Date: **Use tomorrow's date**
   - o Start time: **12:00 PM**
   - o End time: **1:30 PM**
   - o Subject: **Lunch with Marcos**
   - o Location: **Munson's lunchroom**
   - o Memo: **Bring schedule to discuss upcoming events**

Try-it 3

Resources

You will need to open and configure the following resources for this try-it:

1. Open **M5_module_PST_starter** in this module's **Learning Activity Resources** folder. You'll complete all tasks within this Outlook Data File.

2. On the **Calendar** workspace, in the **Folder Pane**, select the **Calendar – M5_module_PST_starter** check box.

3. To display only the course-related calendar, clear the check box next to the default calendar in Outlook.

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. In the **Module 5 Calendar**, select the **11:00 AM** appointment with the **Pick up Munson's event flyers from printer** subject line.

2. Modify the following options for the appointment:

   o Show As: **Out of Office**
   o Reminder: **30 minutes**

3. In the **Module 5 Calendar**, select the **12:00 PM** appointment with the **Lunch with Marcos** subject line.

4. Open the appointment and then configure the following options for the appointment:

   o Show As: **Busy**
   o Reminder: **10 minutes**
   o High Importance: **Selected**
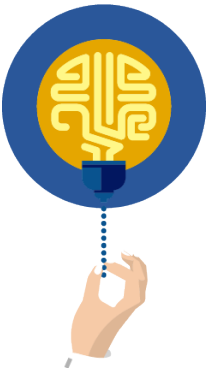
Did you know?

You can create new Outlook **Calendar** items by using the keyboard. From the **Calendar** workspace, select the **Alt** key on the keyboard to display keyboard commands on the ribbon. For example, to create a new appointment, you can select **Alt**+**H**+**I**, and then select **A**. You can use this for other calendar types as well. Select **E** for meetings and **V** for all day events.

■■ Microsoft

Topic 2: Create an all-day event

An event is different from an appointment in that it's an activity that lasts at least 24 hours or longer. For example, imagine that you're out of the office to attend a seminar that lasts a couple of days. You can schedule the seminar as an event in your Outlook **Calendar**. You can only configure the start and end *dates* for events because they don't have specific start and end time periods.

To create an event, in the **New Appointment** window, select the **All day event** check box, as highlighted in the following screenshot.
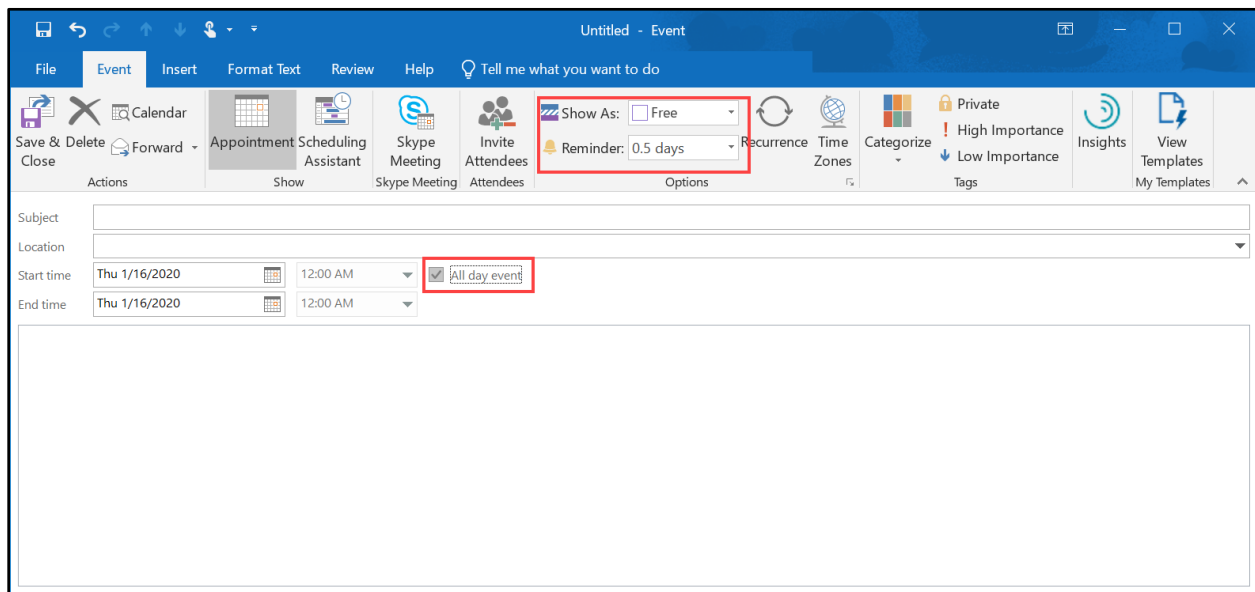
Figure 6: New event options

After you select the **All day event** option, observe the following changes:

- The **Start time** and **End time** only allows changes to the date. The times are greyed out.
- The **Show As** indicator is set to **Free**.
- The **Reminder** indicator is set to **0.5 days**.
- The **Appointment** tab and window are renamed to **Event**.

Microsoft
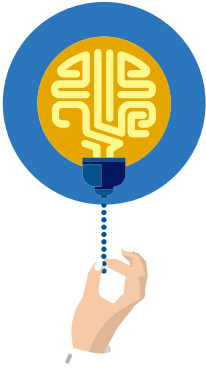
Did you know?

As you create a new event, be sure to modify the **Show As** and **Reminder** settings as needed. By default, others will observe your time as free and potentially add you to meeting requests during the event duration.

Additional information

For more information on creating an all-day event, go to: [Create an all-day event]

Activity: Discuss and learn

In this activity, your teacher will initiate a discussion about the types of events and provide examples. Talk to your classmates and teacher about events in Outlook and ask any questions you might have about all-day events.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Discuss with your teacher the following concepts:

1. What are some good examples of all-day events?

2. What options do you need to consider when configuring an all-day event in the Outlook **Calendar**?

Try-it: Create an all-day event

In this leveled try-it activity, you'll create an all-day event and configure event options in the Outlook **Calendar**.

Microsoft

Try-it 1

Resources

You will need to open and configure the following resources for this try-it:

1. Open **M5_module_PST_starter** in this module's **Learning Activity Resources** folder. You'll complete all tasks within this Outlook Data File.

2. On the **Calendar** workspace, in the **Folder Pane**, select the **Calendar – M5_module_PST_starter** check box.

3. To display only the course-related calendar, clear the check box next to the default calendar in Outlook.

Instructions

The following steps are the general tasks that you need to perform during this try-it:

- In the **Module 5 Calendar**, use the **New Appointment** command to create a new event with the following information:
  - Start Time: Use next Tuesday's date
  - Subject: **Hilary's birthday**
  - All day event: Selected
  - Reminder: **1 day**
  - Memo: **Have the team sign her birthday card!**

Try-it 2

Resources

You will need to open and configure the following resources for this try-it:

1. Open **M5_module_PST_starter** in this module's Learning Activity Resources folder. You'll complete all tasks within this Outlook Data File.

2. On the **Calendar** workspace, in the **Folder Pane**, select the **Calendar – M5_module_PST_starter** check box.

3. To display only the course-related calendar, clear the check box next to the default calendar in Outlook.

Microsoft

Instructions

The following steps are the general tasks that you need to perform during this try-it:

- In the **Module 5 Calendar**, use the **New Appointment** command to create a new event with the following information:
  - Start time: Use Monday two weeks from today
  - End time: Use Friday two weeks from today
  - Subject: **Munson's Blueberry Seminar**
  - All day event: Selected
  - Location: **Event center**
  - Show As: **Out of Office**
  - Reminder: **1 day**

Topic 3: Create a recurring appointment or event

Sometimes you might want to configure an appointment or event to occur multiple times. For example, you might have to attend soccer practice from 4 PM to 5 PM every Tuesday for the next six weeks. Instead of entering six separate appointments in the Outlook **Calendar**, you can create a single recurring appointment that covers the appropriate time period over the next six weeks.
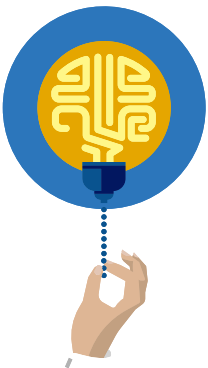
Did you know?

Examples of recurring events that take place on the same date each year might be birthdays, anniversaries, and holidays.

Create a recurring item

To create a recurring appointment or event, you must either first select an existing item or create a new item. Then, on the **Meeting** contextual tab, in the **Options** group, select **Recurrence**. The **Appointment Recurrence** dialog box opens, as in the following screenshot.

Figure 7: **Appointment Recurrence** *dialog box*

The **Appointment Recurrence** dialog box contains the following options:

- **Appointment time**. Specify the start and end time of the recurring item. You can also specify the duration of the activity that you're scheduling.
- **Recurrence pattern**. Configure the frequency of the recurring activity. First, you can select from a **Daily**, **Weekly**, **Monthly**, or **Yearly** occurrence. You can then provide more granular settings such as which day, week, or month to repeat the appointment or event.
- **Range of recurrence**. Specify how long the recurring activity should take place. You can choose to have no end date, end after a set number of occurrences, or end by a specific date.
- **Remove Recurrence**. Remove the recurrence setting from an existing appointment or event.

Modify or remove a recurring item

A recurring item contains many repeating instances of the calendar entry. If you need to modify or remove a specific appointment in the series, you need to ensure that you open the appropriate setting to be configured. The following screenshot depicts the **Open Recurring Item** prompt that displays when you attempt to open a recurring item in the Outlook **Calendar**.

Microsoft
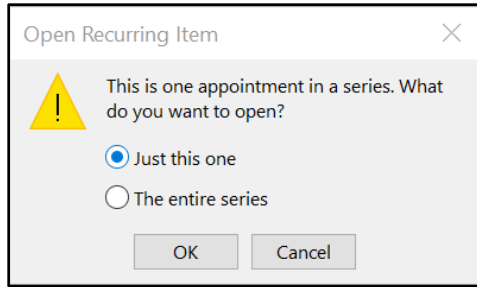
Figure 8: **Open Recurring Item** *dialog box*

From this dialog box, you can choose from the following options:

- **Just this one**. Opens only the instance of the item that you have selected. This allows you to modify the specific options or delete the item without affecting the rest of the recurring series of items.
- **The entire series**. Opens the instance that you have selected. However, any changes you make to the options will affect the entire series of the recurring item. If you delete the item, you will delete the entire series of items as well.
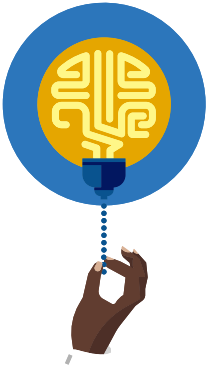
Did you know?

If you need to just remove the recurrence setting on a calendar item, simply open the entire series and select **Recurrence**. Select **Remove Recurrence** to remove the repeating items and keep the original appointment or event intact.

Activity: Show and tell

In this activity, your teacher will demonstrate how to create and modify a recurring appointment in the Outlook **Calendar**.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Pay close attention as your teacher demonstrates the following tasks:

1. Create a new appointment.

2. Configure the new appointment as a recurring item.

3. Modify a single instance of the recurring item.

4. Modify the entire series of the recurring item.

Try-it: Create a recurring appointment or event

In this leveled try-it activity, you'll create and modify a recurring item in the Outlook **Calendar**.

Try-it 1

Resources

You will need to open and configure the following resources for this try-it:

1. Open **M5_module_PST_starter** in this module's **Learning Activity Resources** folder. You'll complete all tasks within this Outlook Data File.

2. On the **Calendar** workspace, in the **Folder Pane**, select the **Calendar – M5_module_PST_starter** check box.

3. To display only the course-related calendar, clear the check box next to the default calendar in Outlook.

Instructions

The following steps are the general tasks that you need to perform during this try-it:

- In the **Module 5 Calendar**, use the **New Appointment** command to create a new recurring appointment with the following information:

  o Start time and End time: **Next Monday from 9:00 AM** to **9:30 AM**
  o Subject: **Deliver produce to local food bank**
  o Location: **Local Food Bank**
  o Reminder: **1 day**
  o Show As: **Busy**
  o Recurrence: Every Monday with no end date

Try-it 2

Resources

You will need to open and configure the following resources for this try-it:

1. Open **M5_module_PST_starter** in this module's **Learning Activity Resources** folder. You'll complete all tasks within this Outlook Data File.

2. On the **Calendar** workspace, in the **Folder Pane**, select the **Calendar – M5_module_PST_starter** check box.

3. To display only the course-related calendar, clear the check box next to the default calendar in Outlook.

Instructions

The following steps are the general tasks that you need to perform during this try-it:

- In the **Module 5 Calendar**, use the **New Appointment** command to create a new recurring item with the following information:

    o Start time and End time: **Next Thursday from 5:00 PM** to **6:00 PM**
    o Subject: **Munson's Honey Growers User Group**
    o Location: **Munson's meeting room**
    o Reminder: **0.5 days**
    o Show As: **Busy**
    o Recurrence: On the second Thursday of every month which ends after **5** occurrences.

Try-it 3

Resources

You will need to open and configure the following resources for this try-it:

1. Open **M5_module_PST_starter** in this module's **Learning Activity Resources** folder. You'll complete all tasks within this Outlook Data File.

2. On the **Calendar** workspace, in the **Folder Pane**, select the **Calendar – M5_module_PST_starter** check box.

3. To display only the course-related calendar, clear the check box next to the default calendar in Outlook.

Instructions

The following steps are the general tasks that you need to perform during this try-it:

- In the Outlook **Calendar**, modify and cancel the third instance of the **Munson's Honey Growers User Group** item.

Wrap-up

Use these questions to check what you learned in this lesson:

1. Describe the difference between an appointment and an event.

   Fill in the blank space.

2. Which of the following are valid **Show As** indicators?

   Select all that apply.

   a. **Free**

   b. **Busy**

   c. **Out for lunch**

   d. **Working Elsewhere**

   e. **Working at home**

3. You want to enter your friend's birthday in the Outlook **Calendar**. Which Outlook item works best for this task?

   Select the correct option.

   a. **Meeting**

   b. **Appointment**

   c. **Event**

   d. **Task**

Microsoft

4. You need to ensure that an appointment is repeated every Tuesday over the next three weeks. Which option should you configure?

Select the correct option.

a. **Reminder**

b. **End time**

c. **Show As**

d. **Recurrence**

Lesson 2: Creating and managing meetings

Overview

Another important aspect of using the Outlook **Calendar** is the ability to send a meeting request to one or more people. When integrated with email systems such as Microsoft Office 365 or Microsoft Exchange, you'll be able to:

- Determine available time periods for people and resources.
- Keep track of who accepts meeting requests.
- Use the Outlook **Calendar** to manage scheduled meetings.

In this lesson, you'll learn how to create and manage meeting requests. You'll also learn how to configure advanced meeting options such as scheduling, utilizing the room finder, and working with time zones. Finally, you'll learn how to update or cancel meeting requests.

Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Describe the difference between an appointment and a meeting.

   Fill in the blank space.

2. As you configure a meeting request, you need to display available times for several required attendees. Which command on the ribbon will provide this information?

   Select the correct option.

   a. **Room Finder**

   b. **Scheduling Assistant**

   c. **Address Book**

   d. **Check Names**

3. You can use Outlook to reserve resources such as rooms and equipment for meetings.

   Select the correct option.

   a. True

   b. False

Topic 1: Create a meeting

A *meeting* is an Outlook **Calendar** appointment that includes sending invitations to request other people to participate. Depending upon the email system that you're using, you can also use the meeting request to reserve additional resources such as meeting rooms or equipment.

To create a meeting request, switch to the Outlook **Calendar** workspace and on the **Home** tab. In the **New** group, select **New Meeting**. The **Meeting** window opens as the following screenshot depicts.
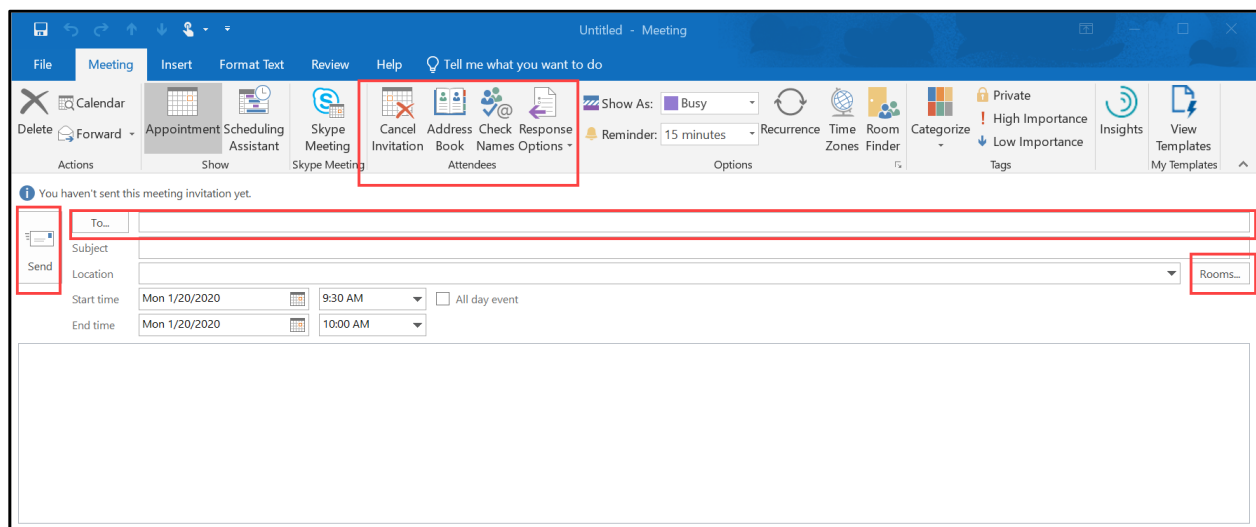
Figure 9: New meeting request

A meeting request is like an appointment. However, it contains a number of additional settings related to scheduling and sending email invitations to potential attendees. Some of these additional settings include:

- **To**. Opens the address book to select attendees for the meeting.
- **Rooms**. Opens the address book, which is automatically filtered to display only room resources. This option is dependent on the email system that you're connected to and its proper configuration by your email administrator.

- **Attendees** group. Contains a number of commands related to meeting requests:
  - o **Cancel Invitation**. Cancels the invitation before it's sent to other people.
  - o **Address Book**. Opens the address book for you to select attendees and resources. This command is similar to the **To** option.
  - o **Check Names**. Resolves the names that you enter in the **To** box to verify that their email addresses are correct and match your contact list.
  - o **Response Options**. Enable or disable recipients to respond to your meeting request and allow new time proposals for the meeting.
- **Send**. Send the meeting request to the recipients listed in the **To** box. In addition to sending the request, the meeting is also scheduled on your calendar during the start and end time specified in the invitation.

Invite attendees to a meeting

Your first step to creating a meeting invitation is to select the attendees. Similar to a standard email message, you can invite participants by providing their email addresses or contact information in the **To** box of the **Meeting** window.

If you enter the email address directly into the **To** box, it's assumed that the listed name is required for the meeting. However, you might want to include optional attendees as well. Selecting the **Address Book** in the ribbon, or simply selecting the **To** option opens the **Select Attendees and Resources** dialog box.

In the **Select Attendees and Resources** dialog box, you can select potential attendees from all the address books available to your profile (as in the following screenshot). Address books might include your own personal contacts in addition to preconfigured address books from your email system.
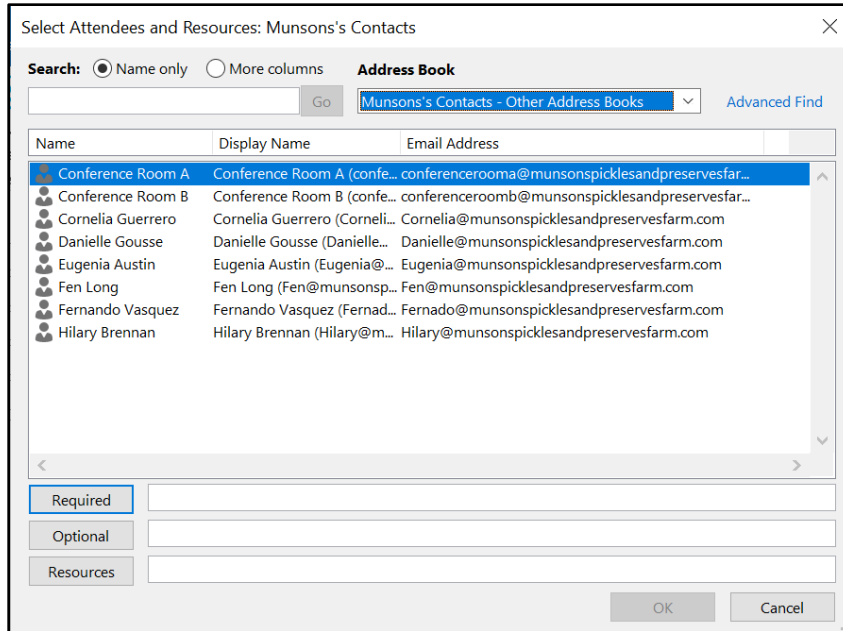
Figure 10: ***Select Attendees and Resources*** *dialog box*

The **Select Attendees and Resources** dialog box provides the following options:

- **Search**. Use this option to search large address lists for specific names.
- **Address Book**. This is a drop-down menu of address books and filtered views to help you find specific attendees and resources.
- **Required**. If you select a name and then select **Required**, it's assumed that the participant is expected to attend and accept the meeting request.
- **Optional**. Use this option to specify potential participants that are not critical to the meeting, but might want to attend if time permits.
- **Resources**. Use this option to specify resources that you might need for the meeting. This might include a conference room, media equipment, or any other resources that your email administrator might have configured within the email system.

Use the Scheduling Assistant

When inviting multiple people to a meeting, it's often difficult to find a date and time that fits everyone's schedule. The **Scheduling Assistant** helps you to find a meeting time where all of your attendees and resources are available.

After entering the **Subject** of the meeting and adding the recipients into the **To** field, on the **Meeting** tab, in the **Show** group, select **Scheduling Assistant**. The **Scheduling Assistant** provides a representation of the free and busy information related to each invited attendee, in addition to **Room Finder** information if selected, as indicated in the following screenshot.

Microsoft
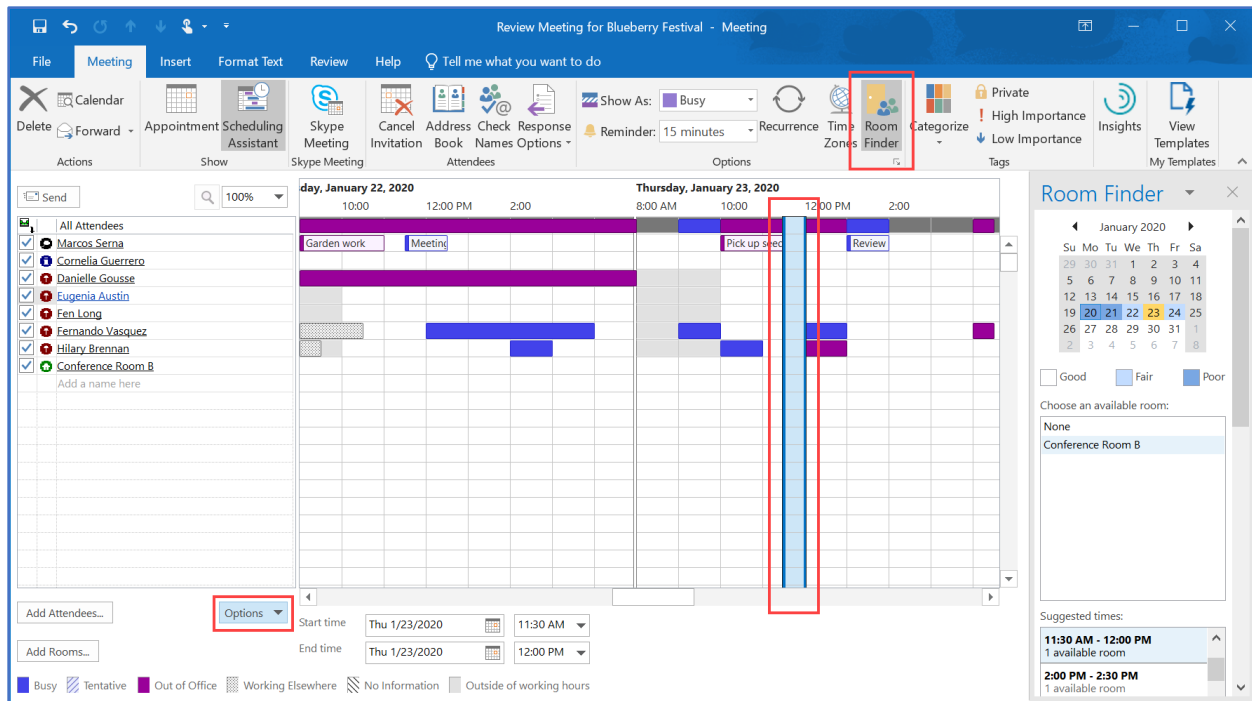
Figure 11: **Scheduling Assistant**
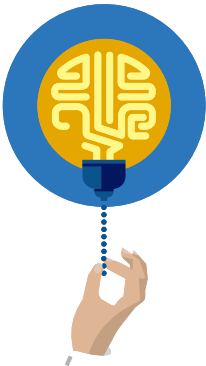
Did you know?

The **Scheduling Assistant** provides two methods to quickly find available times. You can use the **AutoPick** feature or the **Room Finder**. You can access **AutoPick** from the **Options** command. You can access **Room Finder** from the **Options** group on the **Meeting** tab, which displays the **Room Finder** pane with all available conference rooms and suggested times for the meeting.

After the **Options** button and the start and end times, boxes with color coding and patterns display. These colors and patterns represent whether a potential attendee is **Busy**, **Tentative**, **Out of Office**, or **Working Elsewhere**, and are key to determining free/busy states for attendees. Your goal is to find a time period where all of your required attendees are available and don't have any other appointments scheduled. For example, in the previous screenshot, the first time all attendees are available is Thursday from 11:30 AM to 12:00 PM.

After you have determined a successful meeting time, select **Send** to send email invitations to each of the recipients. Resources such as rooms will automatically accept the meeting request as configured by the email administrator.

Microsoft

Configure meeting options

Similar to appointments and events, you can categorize meetings with the following options:

- **Show As**. Specify marked time on the calendar. Options include **Free**, **Working Elsewhere**, **Tentative**, **Busy**, and **Out of Office**. These same indicators are used on the **Scheduling Assistant** to illustrate free/busy time.
- **Reminder**. Specify when you want to receive a reminder for the start of the meeting. The default setting is 15 minutes.
- **Recurrence**. Schedule the meeting to repeat at a specified interval. The options are identical to what was previously discussed with recurring appointments and events.

Work with multiple time zones

Sometimes, you might need to arrange online meetings with attendees from various time zones. In such situations, you can find it helpful to display multiple time zones in your Outlook **Calendar**.

To add time zones to your calendar, open **Outlook Options**, and then select the **Calendar** section. As the following screenshot depicts, you can configure two time zones with labels to be displayed on your Outlook **Calendar**.
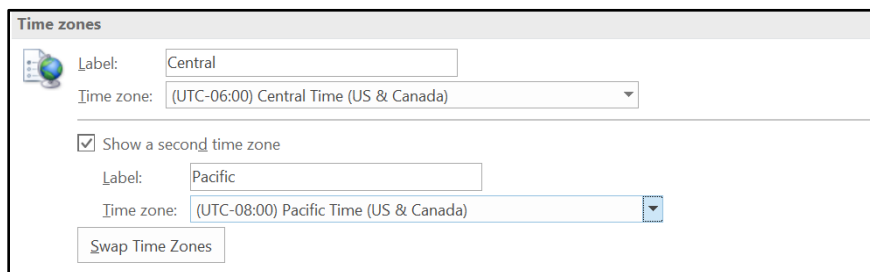
Figure 12: Configuring time zones

The following screenshot depicts an example of two time zones configured with Pacific and Central labels.
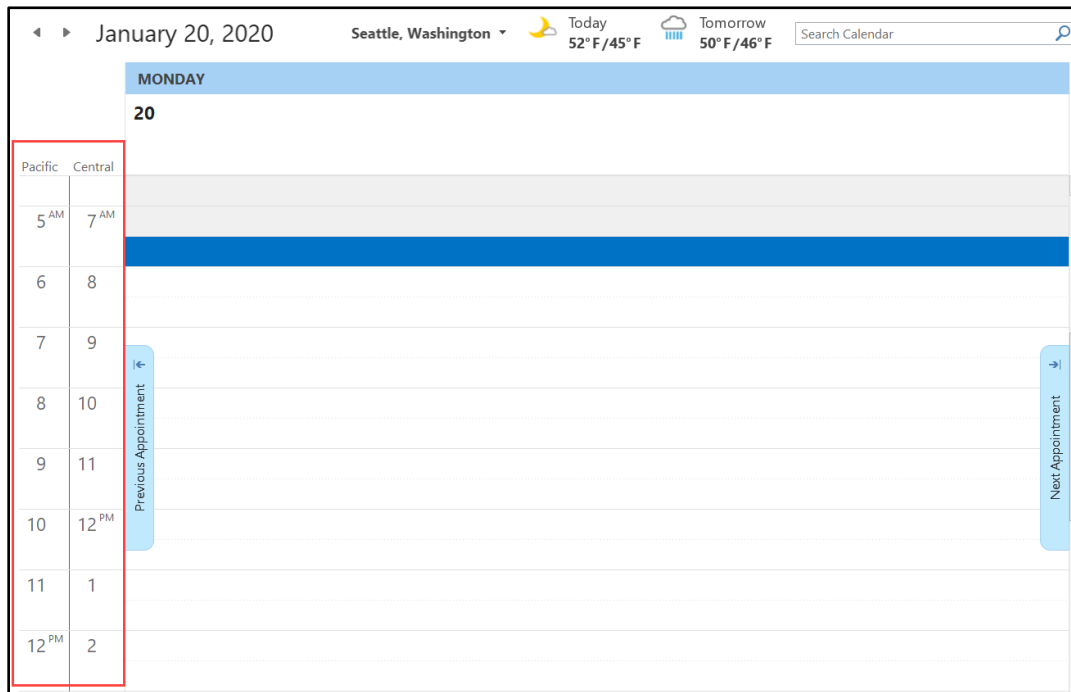
Figure 13: Calendar depicting two time zones

Additional information

For more information on scheduling meetings using Outlook, go to: Schedule a meeting with other people or Use the Scheduling Assistant and Room Finder for meetings in Outlook

Activity: Show and tell

In this activity, your teacher will demonstrate how to create a meeting invitation with multiple recipients in the Outlook **Calendar**.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Pay close attention as your teacher demonstrates the following tasks:

1. Create a new meeting in the Outlook **Calendar**.

2. Invite attendees to a meeting.

3. Determine availability using the **Scheduling Assistant**.

4. Review options for meetings.

Try-it: Create a meeting

In this leveled try-it activity, you'll create new meetings, invite attendees, and configure meeting options in the Outlook **Calendar**.

Try-it 1

Resources

You will need the following resources for this try-it:

- One or more partners as assigned by your teacher.
- Email addresses for each of your assigned partners.

Instructions

The following steps are the general tasks that you need to perform during this try-it:

- In the Outlook **Calendar**, create a new meeting invite using the following information:
    - To: Add the email addresses of your assigned partners
    - Subject: **Blueberry festival Planning Session**
    - Location: **Conference Room 1**
    - Start time: Tomorrow at **10:30 AM**
    - End time: Tomorrow at **11:30 AM**

Try-it 2

Resources
You will need the following resources for this try-it:

- One or more partners as assigned by your teacher.
- Email addresses for each of your assigned partners.

Microsoft

Instructions

The following steps are the general tasks that you need to perform during this try-it:

- In the Outlook **Calendar**, use the **Scheduling Assistant** to help create a new meeting invite by using the following information:
  - To: Add the email addresses of your assigned partners
  - Subject: **Munson's weekly status meeting**
  - Location: **Conference Room 1**
  - Use the **Scheduling Assistant** to determine the best time to schedule a meeting on either a **Tuesday** or **Wednesday**.
  - Recurrence: Every week on the day and time you have determined by using the **Scheduling Assistant**.

Topic 2: Create a meeting from a message

Sometimes, you might receive email messages that lead to a need for meetings. For example, your coworker might have an important question about a project that has an approaching deadline. To figure out the best approach, you might need to set up a meeting with your coworker and/or others. In such situations, in addition to standard responses, you can also respond to an email message by replying with a meeting request.

As the following screenshot depicts, the **Respond** group contains the **Meeting** command, which you can use to reply to a message with a meeting request. The **Respond** group is located on the ribbon of the **Mail** workspace and on the ribbon of an open email message.
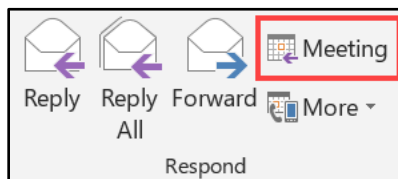
Figure 14: Meeting response option

When you select **Meeting** as a response to an email message, the standard **Meeting** window displays, as the following screenshot depicts. The memo section of the meeting request also includes the content of the email message.
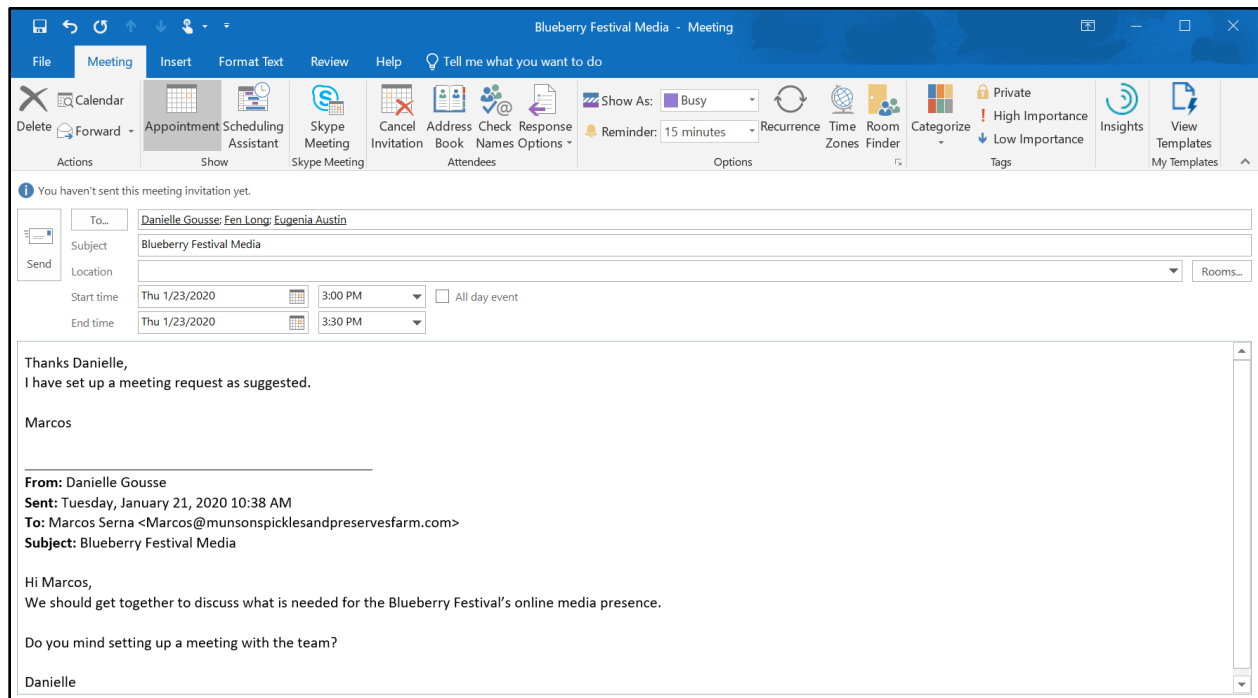
Figure 15: Meeting response from an email message

The meeting response provides access to all of the standard meeting options such as the **Scheduling Assistant**, **Room Finder**, **Reminder**, **Recurrence**, and other options, as previously discussed.
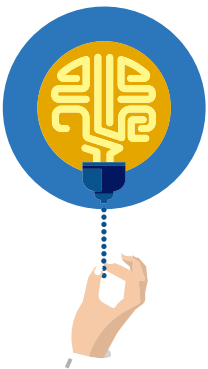
Did you know?

If your original email contains multiple recipients, your meeting request will automatically include all recipients from the **To** and **Cc** lines.

Activity: Show and tell

In this activity, your teacher will demonstrate how to respond to an email message with a meeting invitation in the Outlook **Calendar**.

Resources required
You will need the following resources for this activity:

- None

Activity instructions
Pay close attention as your teacher demonstrates the following tasks:

1. Respond to an email message with a meeting request.

2. Invite attendees to a meeting.

3. Review additional options for meetings.

Try-it: Create a meeting from a message

In this leveled try-it activity, you'll create a meeting response from an email message in Outlook.

Try-it 1

Resources

You will need the following resources for this try-it:

- One partner as assigned by your teacher.
- Email address for yourself and for your assigned partner.

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Send a new email message to your partner with the following information:

   o To: Add the email address of your assigned partner
   o Subject: **Meet for lunch**
   o Content: **Hi there, let's meet for lunch to discuss plans for the cookbook edits.**

2. From your partner's inbox, select the message with the subject "**Meet for lunch**."
   Respond by creating a new meeting invite by using the following information:

   o To: Verify that your assigned partner's email address is listed

   o Subject: **Meet for lunch**

   o Location: **Lunch Room**

   o Start time: **Tomorrow at 12:00 PM**

   o End time: **Tomorrow at 1:00 PM**

Try-it 2

Resources
You will need the following resources for this try-it:

- One partner as assigned by your teacher.
- Email address for yourself and your assigned partner.
- Additional email addresses for potential attendees.

Instructions
The following steps are the general tasks that you need to perform during this try-it:

1. Send a new email message to your partner with the following information:

   o To: Add the email address of your assigned partner

   o Subject: **Meet to discuss project plan for festival**

   o Content: **Hi there, can we organize a meeting to discuss the project plan for the Blueberry festival? Let's invite the rest of the team. I should be available sometime later this or next week.**

2. From your partner's inbox, select the message with the subject "**Meet to discuss project plan for festival**." Respond by creating a new meeting invite by using the following information:

   o To: Add the additional email addresses of your assigned attendees.

   o Subject: **Meet to discuss project plan for festival**

   o Location: **Conference Room 1**

   o Use the **Scheduling Assistant** to determine the best time to schedule a meeting on either a Wednesday or Thursday.
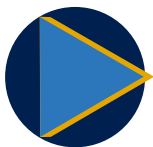
Video

To review the video on how to create a meeting request from an email message, go to: <u>Respond to an email message with a meeting request</u>

Microsoft

Topic 3: Track, update, or cancel a meeting

After you have sent a meeting request and the attendees have responded, you might want to display tracking status to determine how each recipient has responded to the request. There might also be times when you need to change meeting details after scheduling it. For example, you might need to change the meeting time or the attendees, or you might even have to cancel the meeting altogether.

Display tracking status

When you're organizing a meeting, it's beneficial to keep track of who has responded to the meeting request. The Outlook **Calendar** provides a meeting tracking feature, which contains a list of all the proposed attendees and their responses.

To use the tracking feature, select or open a current meeting request to display the options on the **Meeting** tab ribbon. When you select the **Tracking** button in the **Show** group, the tracking status opens, as depicted in the following screenshot.
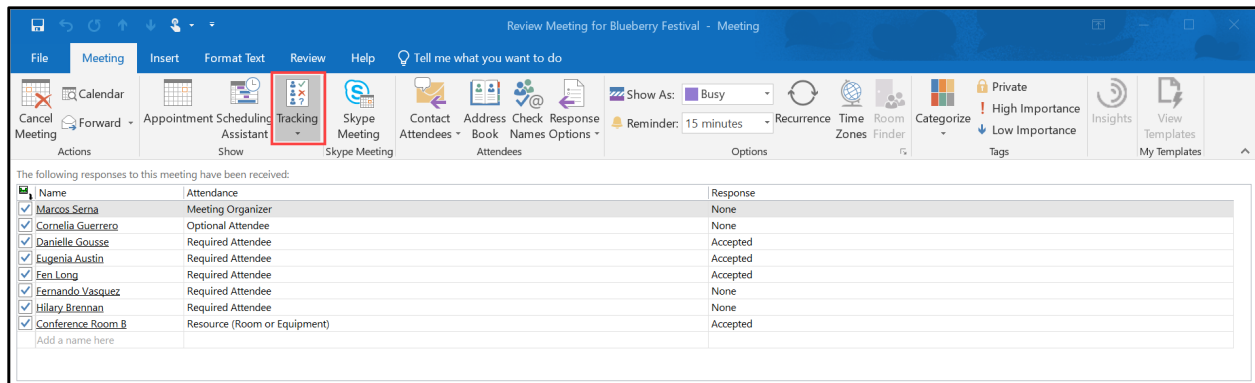
Figure 16: Displaying tracking status for a meeting

The tracking status provides information such as:

- People who have invites to the meeting.
- Whether a person is a required or optional attendee.
- The attendee's current response to the meeting invite.

Update a meeting

You can update a scheduled meeting at any time, regardless of how many people have responded to the request. When you open a scheduled meeting, all the same options are available as when you created the new meeting. You can change options such as the **Subject**, **Location**, **Start time**, **End time**, **Show As**, and **Reminder**. You can also add or remove attendees, or use the **Scheduling Assistant** to find a new meeting time, if needed.

As the following screenshot depicts, the primary difference between scheduling and updating a meeting is the **Send Update** button. Selecting this sends a new email to the list of attendees notifying them of the changes requesting approval.
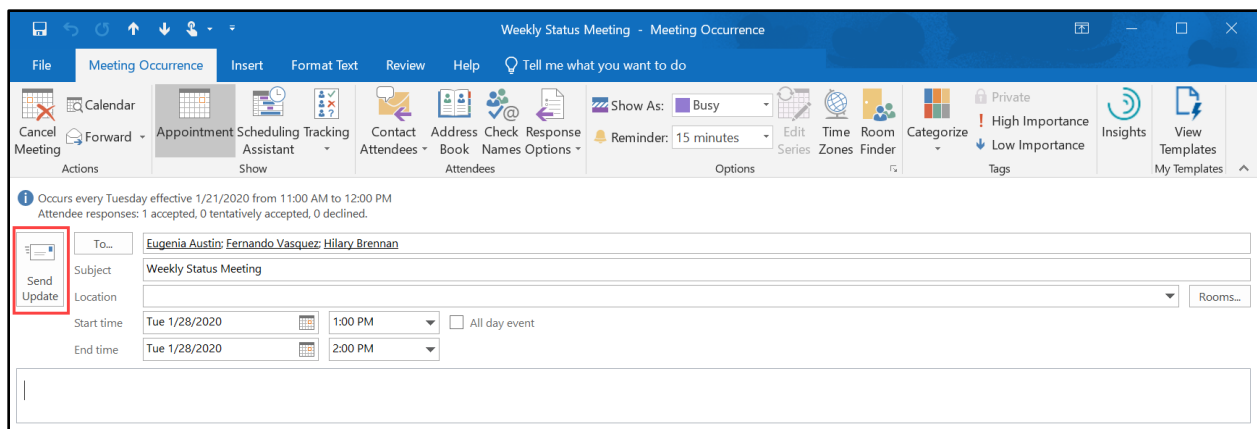
Figure 17: Updating a meeting request

Cancel a meeting

To cancel a scheduled meeting, select or open the meeting in your Outlook **Calendar**. On the ribbon, in the **Actions** group, select **Cancel Meeting**.

As the following screenshot depicts, you can select the **Send Cancellation** button to send a new email to the attendees notifying them of the cancellation.
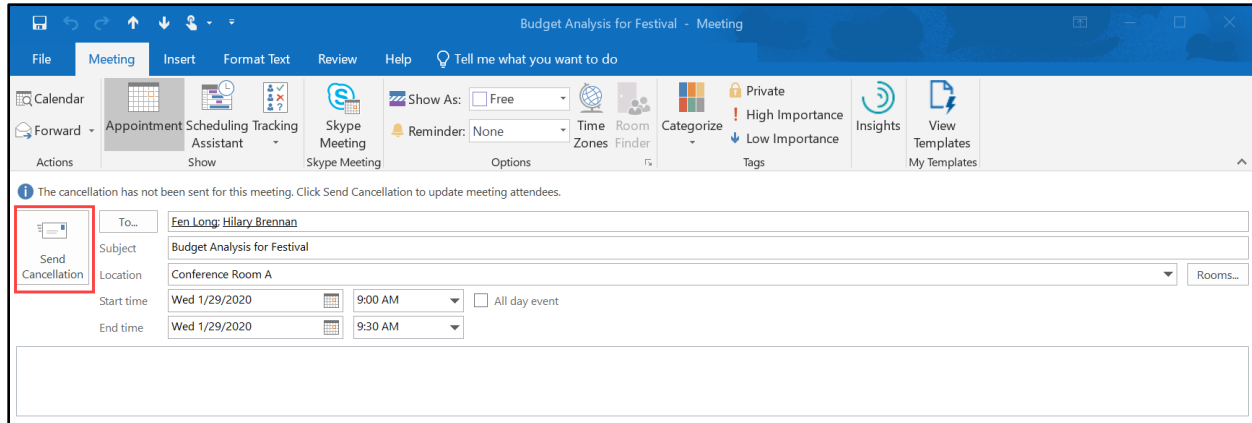
Figure 18: Cancelling a meeting request

After you send the cancellation message, Outlook removes the scheduled meeting from your calendar. All other attendees receive an email message with a notification that the meeting is cancelled. They will also receive an option to remove the meeting from their calendar.

Additional information

For more information on cancelling a meeting, go to: Cancel a meeting

Activity: Each one, teach one

In this activity, you'll work with a partner to research how to cancel a meeting. You'll then teach each other what you've learned. Your teacher will guide the class through this activity.

Resources required
You will need the following resources for this activity:

- None

Activity instructions
Participate in the activity by following these instructions:

1. Pair up with a classmate.

2. Search Outlook **Help** or open a support article about how to cancel a meeting request.

3. Teach your partner what you learned, and then discuss with them what they learned.

Microsoft

Try-it: Track, update, or cancel a meeting

In this leveled try-it activity, you'll update and cancel a meeting in the Outlook **Calendar**.

Try-it 1

Resources
You will need the following resources for this try-it:

- Two partners as assigned by your teacher.
- Email addresses for each of your assigned partners.

Instructions
The following steps are the general tasks that you need to perform during this try-it:

1. In the Outlook **Calendar**, create a new meeting invite using the following information:

   o To: Add the email address of one of your assigned partners
   o Subject: **Budget planning**
   o Location: **Conference Room 1**
   o Start time: Next Tuesday at **2:00 PM**
   o End time: Next Tuesday at **3:00 PM**

2. In the Outlook **Calendar**, create a new meeting invite using the following information:

   o To: Add the email address of all your assigned partners
   o Subject: **Lunch Meeting**
   o Location: **Lunch Room**
   o Start time: Next Thursday at **12:00 PM**
   o End time: Next Thursday at **1:00 PM**

3. Update the **Budget planning** meeting with the following changes:

   o To: Add the email address of your second assigned partner
   o Start time: Next Wednesday at **2:00 PM**
   o End time: Next Wednesday at **3:00 PM**

Microsoft

Try-it 2

Resources
You will need the following resources for this try-it:

- Two partners as assigned by your teacher.
- Email addresses for each of your assigned partners.
- Completed Try-it 1.

Instructions

The following steps are the general tasks that you need to perform during this try-it:

- Cancel the meeting with the subject of **Lunch Meeting** that was scheduled for next Thursday.

Wrap-up

Use these questions to check what you learned in this lesson:

1. The **To** option opens the _____, which contains a list of names and email addresses.

   Fill in the blank space.

2. After attendees accept your meeting request, you cannot make any changes to the meeting options.

   Select the correct option.

   a. True

   b. False

3. The **Scheduling Assistant** can depict if a potential attendee is working elsewhere during the proposed meeting time.

   Select the correct option.

   a. True

   b. False

4. You need to determine which attendees have responded to your meeting request. Which option provides this information?

Select the correct option.

a. **Scheduling Assistant**

b. **Response Options**

c. **Show As**

d. **Tracking**

Lesson 3: Responding to meeting requests

Overview

When you receive a meeting request, you need to submit an appropriate response to the organizer. Responding to the invite is important so that the organizer can accurately track details of the meeting and set expectations on who will or will not be in attendance for the meeting.

In this lesson, you'll learn how to respond to a meeting request. You'll also learn how to work with reminders and forward a meeting request to other potential attendees.

Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Describe why it's important to respond to a meeting request.

    Fill in the blank space.

2. You have received a meeting request; however, the meeting time will not work with your schedule. You have an alternate time that is open. Which of the following options should you use to respond to the meeting request?

    Select the correct option.

    a. **Accept**

    b. **Propose New Time**

    c. **Move to**

    d. **Follow Up**

3. You receive a reminder to attend a meeting in 30 minutes. You would like to be reminded again five minutes before the meeting starts. Which of the following options would you select?

Select the correct option.

   a. **Snooze**

   b. **Dismiss**

   c. **Tentative**

   d. **Follow Up**

Topic 1: Respond to a meeting request

Responding to a meeting request means that you're communicating your intentions for attending the meeting. Depending upon your available time and interest, you have options to provide various responses to the meeting organizer.

When you open a meeting request message, the **Meeting** tab contains the **Respond** group of commands, as in the following screenshot.
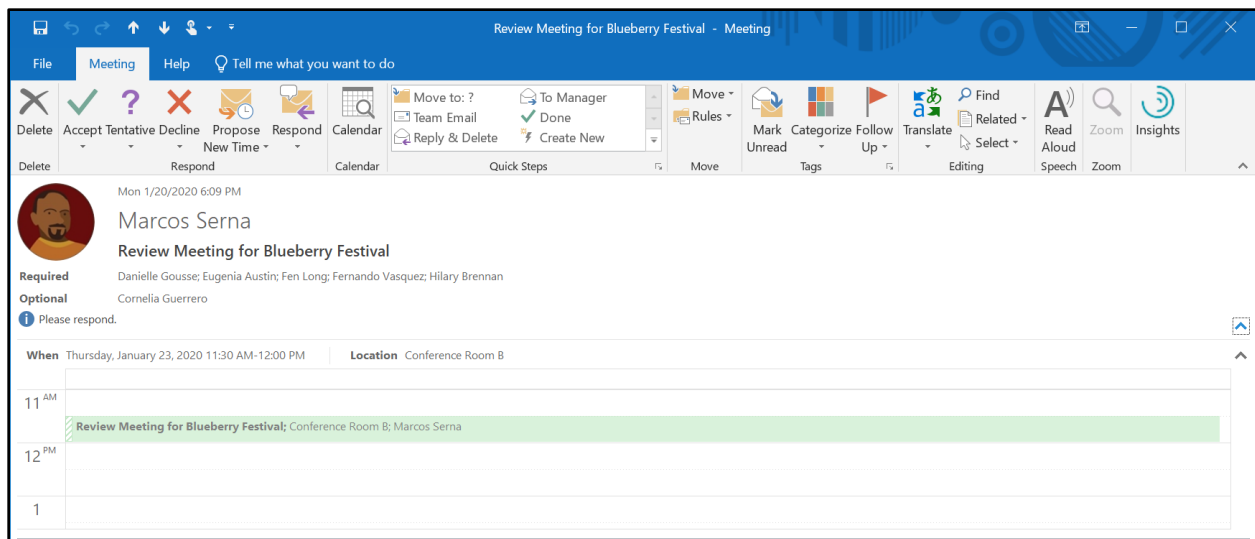
Figure 19: Responding to a meeting request

Possible responses to the meeting request include:

- **Accept**. Accept the proposed date and time for the meeting.
- **Tentative**. Indicate that you might attend, depending on availability.
- **Decline**. Indicate that you will not be able to attend the meeting on the proposed date and time.

Microsoft

When you select any of the previous responses, you can choose from various additional options for the organizer. Possible options for each response include:

- **Edit the Response before Sending**. Provide additional information in the form of an email response to the meeting organizer.
- **Send the Response Now**. Send the meeting response without any additional information or communication.
- **Do Not Send a Response**. Choose not to send any response or communication to the meeting organizer. Note that if you select this option, the meeting organizer will not know whether you have accepted the meeting request or plan on attending the meeting.

If a meeting request doesn't work for you at the specified date or time, you can respond to the request by selecting the **Propose New Time** option. When you select this option, you can choose to tentatively accept the request but propose a new time. You can also decline the original request and propose a new time.

After you make the appropriate selection, the **Propose New Time** dialog box opens, as in the following screenshot. This feature is quite similar to the **Scheduling Assistant**.
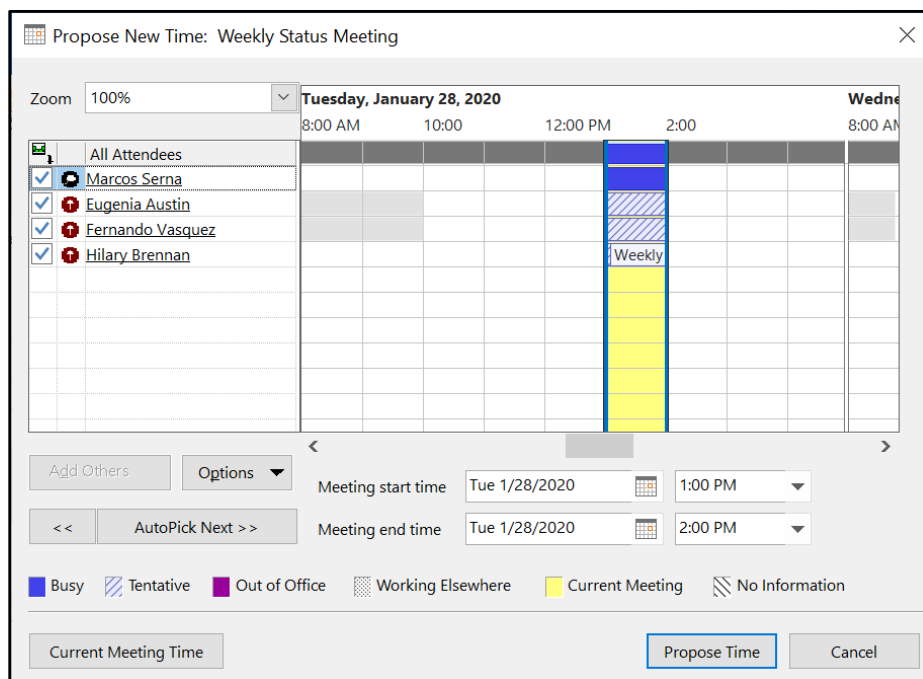
Figure 20: Propose a new time for a meeting request

After you select the newly proposed time, select **Propose Time** to send the response to the meeting organizer.

Configure automatic response settings

The **Calendar** section of the **Outlook Options** dialog box provides settings to automatically accept or decline meeting requests based upon specific circumstances. As the following screenshot depicts, after you select **Auto Accept/Decline**, the **Automatic Accept or Decline** dialog box opens.
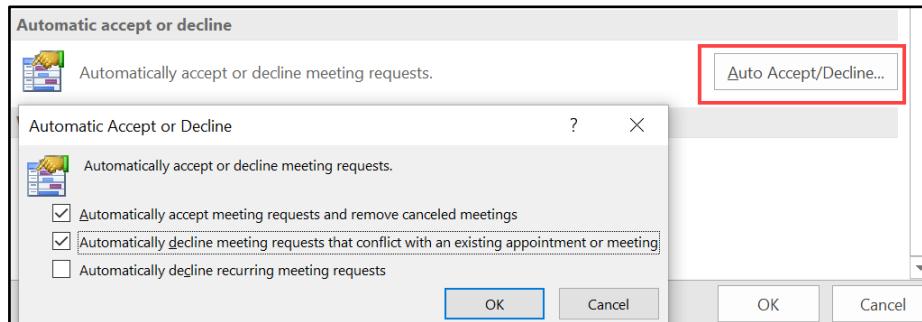
*Figure 21: Configuring **Automatic accept or decline***

In the **Automatic Accept or Decline** dialog box, you can specify how automatic responses occur by selecting from the following options:

- **Automatically accept meeting requests and remove canceled meetings**. Select this option to have Outlook automatically accept and schedule all meeting requests in your calendar, and automatically remove all canceled meetings.

- **Automatically decline meeting requests that conflict with an existing appointment or meeting**. When you select this option, Outlook automatically declines any meeting request that conflicts with an existing appointment or meeting in your calendar. Outlook also sends a decline notice to the meeting organizer for tracking.

- **Automatically decline recurring meeting requests**. Select this option to automatically decline any meeting requests that are configured with a recurrence setting.

Work with reminders

Before sending a meeting request, the organizer often configures a default reminder to ensure that attendees are reminded of the start to the scheduled meeting. As the time for the meeting gets closer, the **Reminder** window displays as configured by the organizer.

As the following screenshot depicts, the **Reminder** window provides information about an upcoming meeting. This information includes the subject line, the start time, and the amount of time until the meeting starts.

Microsoft
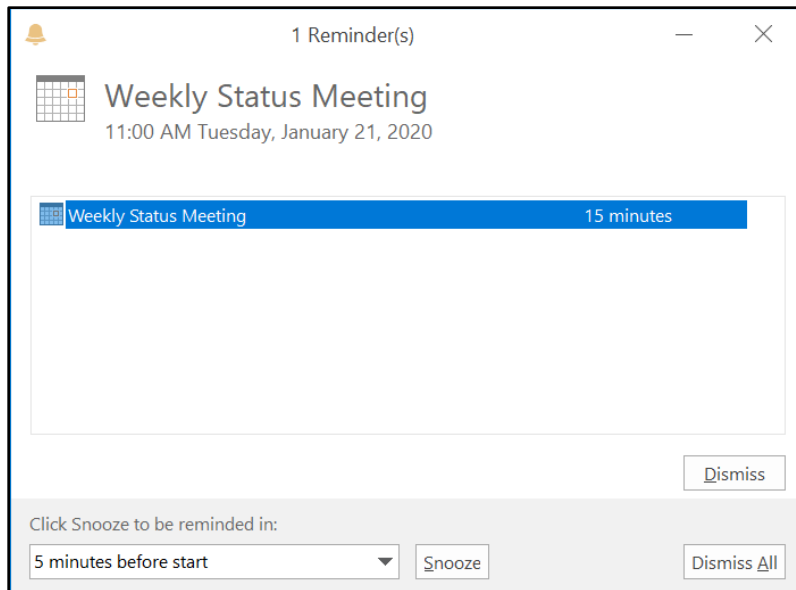
*Figure 22: **Reminder** window*

You can also select from the following options as a response to the reminder:

- **Dismiss**. Selecting this option stops reminders for the meeting.
- **Dismiss All**. Select this option if you have several meetings and/or appointments scheduled within the configured time period. This option dismisses all the listed items at once. By choosing this option you won't have to select and dismiss each meeting or appointment one at a time.
- **Snooze**. Set another reminder to prompt you again closer to the actual meeting or appointment time. The drop-down menu provides time periods from 5 minutes to 2 weeks.
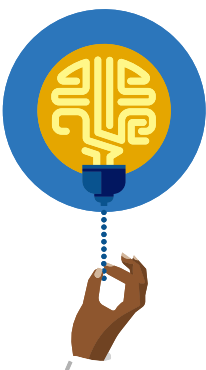
Did you know?

You can set reminders for all calendar items, including appointments, events, and meeting requests.

Activity: Show and tell

In this activity, your teacher will demonstrate how to respond to a meeting request in the Outlook **Calendar**.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Pay close attention as your teacher demonstrates the following tasks:

1. Create a new meeting in the Outlook **Calendar** and invite attendees.

2. Observe the email that contains the meeting invite.

3. Review the response options and then respond to the meeting invite.

4. Review the reminder options.

Try-it: Respond to a meeting request

In this leveled try-it activity, you'll create new meetings, invite attendees, and configure meeting options in the Outlook **Calendar**.

Try-it 1

Resources

You will need the following resources for this try-it:

- Three partners as assigned by your teacher.
- Email addresses for each of your assigned partners.

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. **Partner 1 only**: In the Outlook **Calendar**, create a new meeting invite using the following information:

   o To: Add the email addresses of your assigned partners
   o Subject: **Plan Munson's Shareholder's meeting**
   o Location: **Conference Room 1**
   o Start time: next Monday at **8:30 AM**
   o End time: next Monday at **10:00 AM**

2. **Partners 2 and 3 only**: When you receive the meeting invitation from Partner 1 in your inbox, accept the meeting and send the response now.

Microsoft

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Try-it 2

Resources
You will need the following resources for this try-it:

- One to three partners as assigned by your teacher.
- Email addresses for each of your assigned partners.

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. **Partner 2 only**: In the Outlook **Calendar**, create a new meeting invite using the following information:

   o To: Add the email addresses of your assigned partners
   o Subject: **Discuss work schedule for seasonal cleanup**
   o Location: **Conference Room 1**
   o Start time: next Wednesday at **3:30 PM**
   o End time: next Wednesday at **4:30 PM**

2. **Partners 1 and 3 only**: When you receive the meeting invitation from Partner 2 in your inbox, tentatively accept the meeting and edit the response before sending. For your edited response, provide a reason why you might not attend the meeting, and then send the response.

Try-it 3

Resources
You will need the following resources for this try-it:

- One to three partners as assigned by your teacher.
- Email addresses for each of your assigned partners.

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. **Partner 3 only**: In the Outlook **Calendar**, create a new meeting invite using the following information:

   o To: Add the email addresses of your assigned partners
   o Subject: **Lunch Meeting**
   o Location: **Local restaurant**
   o Start time: next Friday at **12:00 PM**
   o End time: next Friday at **1:00 PM**

Microsoft

2. **Partners 1 and 2 only**: When you receive the meeting invitation from Partner 3 in your inbox, propose a new time by declining the meeting and send an alternate time for the meeting.

Topic 2: Forward a meeting

When you schedule and manage meetings with your contacts, there might be situations in which you need to forward a meeting request to another person. For example, imagine that a friend lets you know a week before your revision meetup that they want to join as well. You want to add your friend, who was not on the original attendee list. As the meeting organizer, you can update the original meeting to add friend. Any of your other friends on the original invite can also forward the invite to your friend.

To forward a meeting to another person, open the meeting and on the **Meeting Series** tab, in the **Actions** group, select **Forward**. The following screenshot highlights this option.
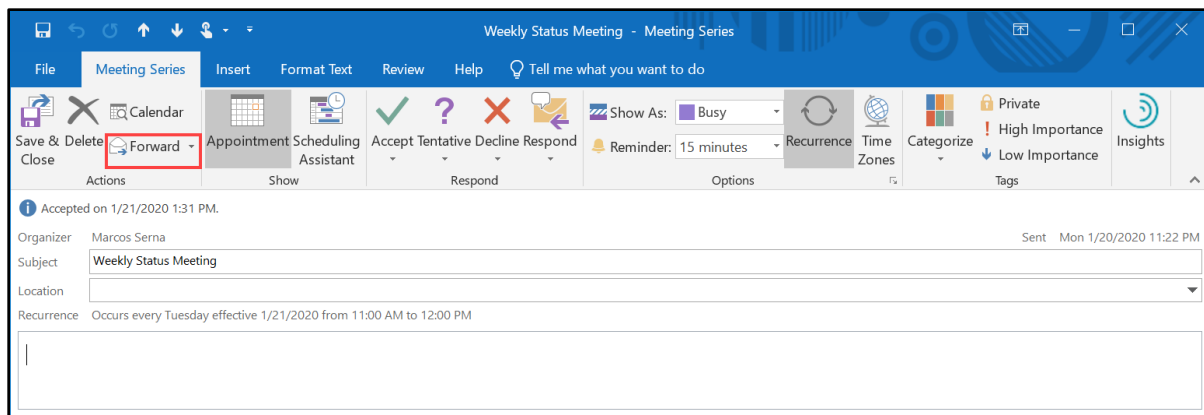
Figure 23: Forwarding a meeting

After you select **Forward**, a standard email message opens, which contains the meeting details. The message also indicates that the invite is sent on behalf of the meeting organizer.

Note: When you forward a meeting to another person, Outlook sends an email notification to the meeting organizer as the following screenshot depicts. However, existing attendees are not notified when you forward a meeting request to another person.
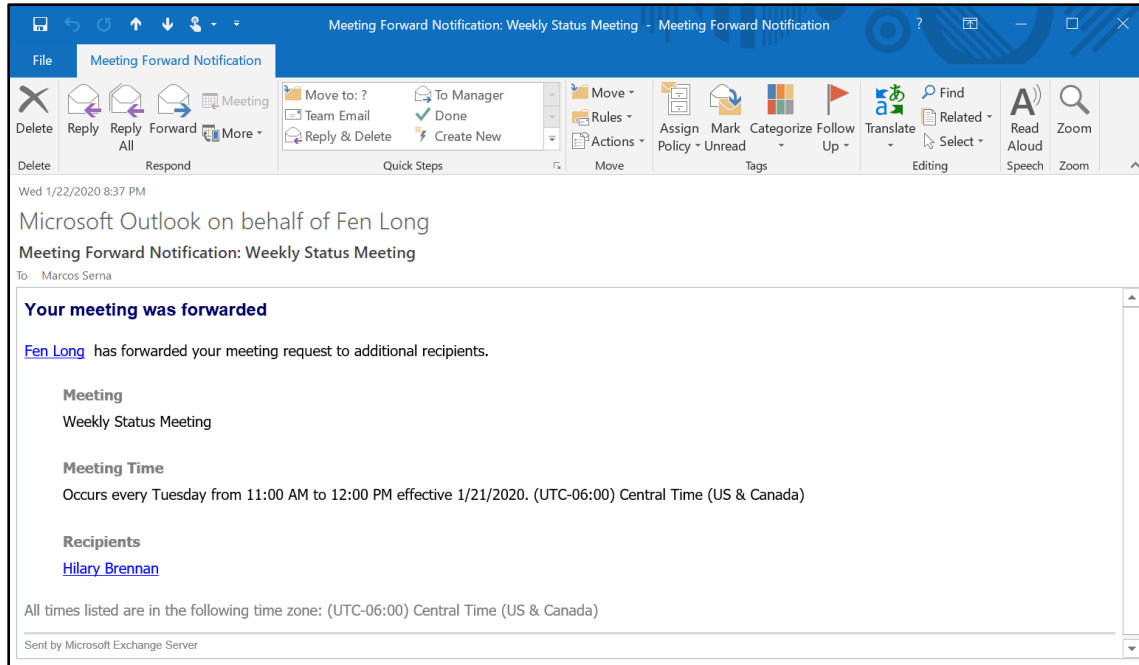
Figure 24: Meeting forward notification

Additional information

For more information on how to forward a meeting, go to: Forward a meeting

Activity: Show and tell

In this activity, your teacher will demonstrate how to forward a meeting invitation in the Outlook **Calendar**.

Resources required
You will need the following resources for this activity:

- None

Activity instructions
Pay close attention as your teacher demonstrates the following tasks:

1. Create a new meeting in the Outlook **Calendar** and invite attendees.

2. Observe the received email that contains the meeting invite.

3. From the recipient calendar, forward the meeting to another person.

4. Review the **Meeting Forward Notification** from the organizer's inbox.

Try-it: Forward a meeting

In this standalone try-it activity, you'll create a new meeting request, and then forward a meeting request to a new recipient.

Resources

You will need the following resources for this try-it:

- Three partners as assigned by your teacher.
- Email addresses for each of your assigned partners.

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. **Partner 1 only**: In the Outlook **Calendar**, create a new meeting invite using the following information:

   o To: Add the email address of **Partner 2**

   o Subject: **Plan Honey Festival Print Media**

   o Location: **Conference Room 1**

   o Start time: next Monday at **10:30 AM**

   o End time: next Monday at **11:00 AM**

2. **Partner 2 only**: When you receive the meeting invitation from Partner 1 in your inbox, accept the meeting and send the response now.

3. **Partner 2 only**: Forward the meeting invitation to **Partner 3**.

4. **Partner 3 only**: When you receive the meeting invitation from Partner 2 in your inbox, accept the meeting and send the response now.

5. **Partner 1 only**: Review the **Meeting Forward Notification** in the Outlook inbox.

Wrap-up

Use these questions to check what you learned in this lesson:

1. You can use the _____ response option to indicate that you might attend as time or circumstance allows.

   Fill in the blank space.

2. The _____ is the person that creates the meeting request and sends the meeting invitations.

   Fill in the blank space.

3. Any required attendee can cancel a scheduled meeting.

   Select the correct option.

   a. True

   b. False

4. When you forward a meeting to another person, meeting attendees are not notified.

   Select the correct option.

   a. True

   b. False

5. You can configure Outlook to automatically respond to meeting requests.

   Select the correct option.

   a. True

   b. False

Lesson 4: Coordinating your schedule with others

Overview

An interesting aspect of organizing a meeting is the ability to use the **Scheduling Assistant** to discover other people's available times. However, there might be times when you would like to review a coworker's actual calendar to determine availability. You might also need to coordinate your schedule and share your calendar with other people. Or, you might be part of a project team that needs access to a shared project-based calendar to organize specific tasks.

In this lesson, you'll learn how to coordinate your schedule with others by using various methods to share and provide access to your calendar. You'll also learn how to create new calendars and display multiple calendars in a more efficient manner. You'll do this by using features such as side-by-side mode, **Overlay** mode, and **Calendar Groups**.

Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Describe some of the challenges in sharing your calendar information with other users.

    Fill in the blank space.

2. You need to share your calendar information with a person outside of your organization. The calendar will be updated on a regular basis. Which of the following is the best option?

    Select the correct option.

    a. Email your calendar.

    b. Publish your calendar to an online Web-based Distributed Authoring and Versioning (WebDAV) server.

    c. Modify calendar permissions to allow access to the user.

    d. Share your calendar using Outlook.

3. Which of the following options will merge multiple calendars on top of each other?

   Select the correct option.

   a. Overlay mode

   b. Schedule view

   c. Calendar Groups

   d. Side-by-side mode

Topic 1: Manage multiple calendars

As you use the Outlook **Calendar** to manage your schedule, you'll quickly learn that it can do more than just keep track of your personal appointments and meetings. You might belong to one or several committees at school, or maybe you manage the schedule for a sports team. You might also need a way to track bookings for a resource, such as a room or equipment, without having to rely on the email administrator to set it up in the email system. The Outlook **Calendar** supports the creation and management of multiple calendars so that you can organize your various schedules.

For each of these scenarios, creating a new calendar specifically for the project or committee enables you to:

- Focus only on a resource or committee schedule without having to filter through unrelated personal calendar entries.
- Keep your personal schedule separate from the specific resource or committee calendars.
- Share calendar information more securely, without having to worry about people inadvertently viewing items in your personal calendar.

Create and display multiple calendars

If you engage in various committee or project team activities, you'll know that each project likely has its own schedule made up of meetings and deadlines. To help manage each specific schedule, you can create a new calendar by using one of the following methods:

- From the **Calendar** workspace, on the **Home** tab of the ribbon, select **Open Calendar**, and then select **Create New Blank Calendar**.
- From the **Calendar** workspace, on the **Folder** tab of the ribbon, select **Create New Calendar**.

Either method opens the **Create New Folder** dialog box, as the following screenshot depicts.
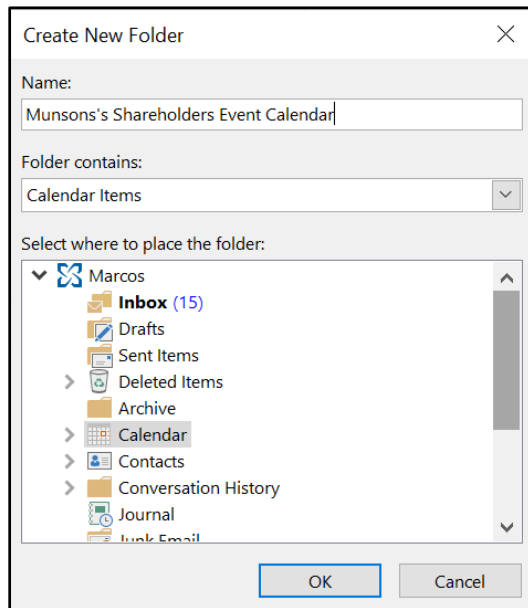
*Figure 25: Create a new calendar using the **Create New Folder** dialog box*

To create a new calendar, enter an appropriate name in the **Name** box, and in the **Folder contains** drop-down menu, select **Calendar Items**. For the final step, select where to place the folder. This location would typically be in your main Outlook data file.

As the following screenshot depicts, each of your calendars are listed in the **Folder Pane**, under the **My Calendars** group on the **Calendar** workspace. Multiple calendars are, by default, displayed in side-by-side mode.
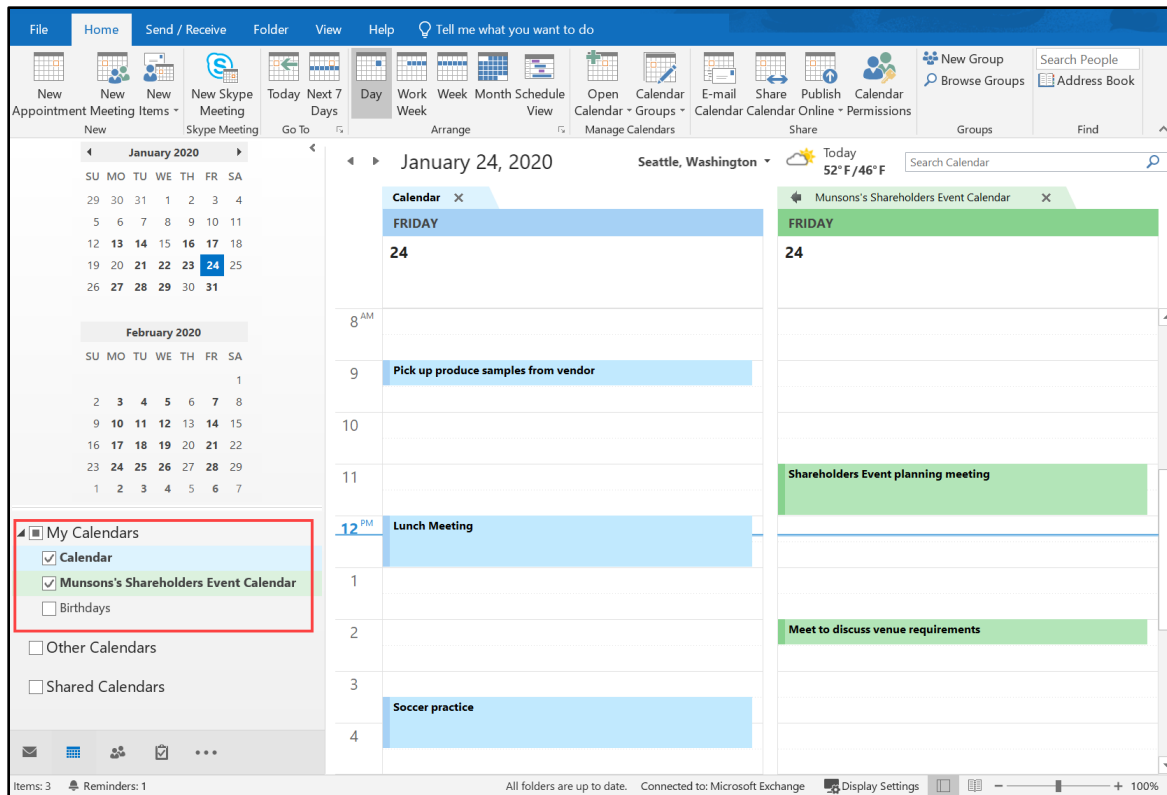
Figure 26: Viewing multiple calendars

You can also hide or display specific calendars by selecting the check box next to the calendar name.

Use Overlay mode to display multiple calendars

Comparing the schedules of multiple calendars can be difficult when displayed in side-by-side mode. This can become increasingly cumbersome when you have multiple calendars to select, display, and manage.

Overlay mode provides a way to display a merged version of multiple selected calendars. The following screenshot illustrates **Overlay** mode with **Calendar** and **Munson's Shareholders Event Calendar** selected. Note that scheduled items from both calendars display in a single window. Calendar items are also color-coded to help distinguish which calendar the scheduled item belongs to.

To display selected calendars in **Overlay** mode, on the **Calendar** workspace, select the **View** tab. As depicted in the following screenshot, the **Overlay** option enables the merged view. You can also select the **Overlay** option to revert back to side-by-side mode as needed.

Microsoft
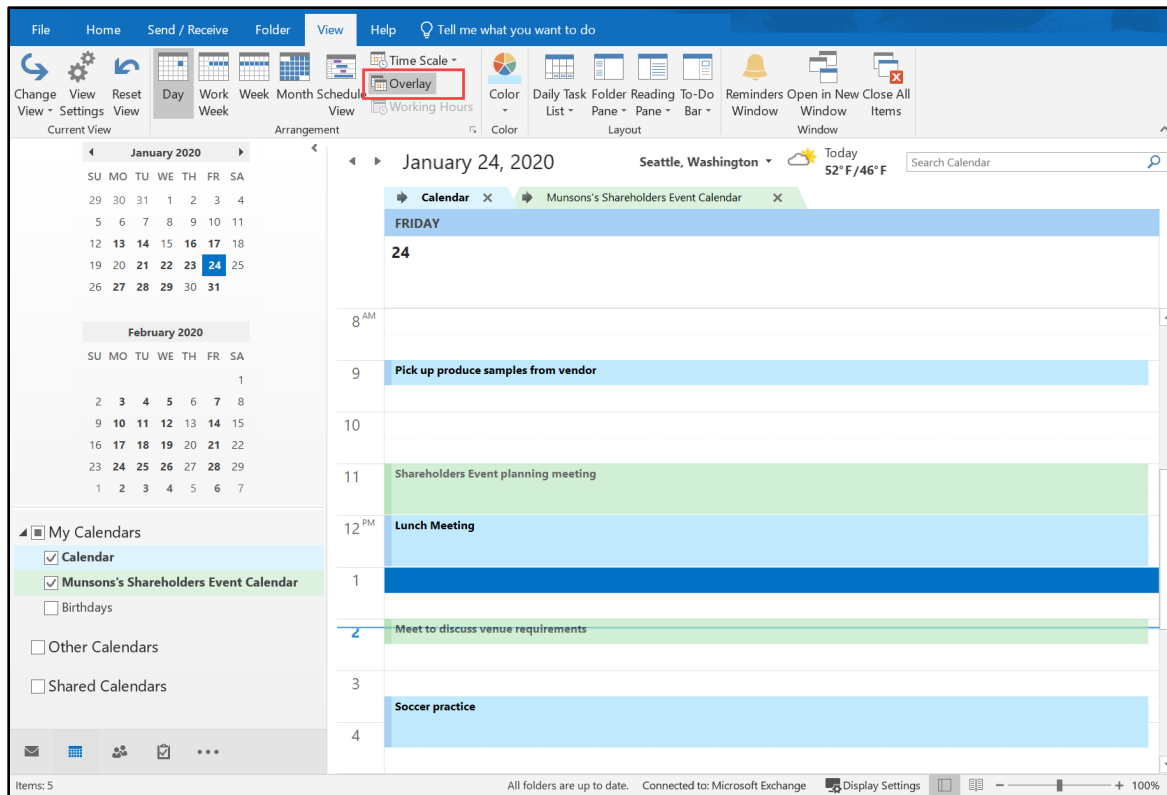
*Figure 27: Displaying calendars using **Overlay** mode*

Additional information

For more information on creating and displaying multiple calendars, go to: Create additional calendars and View multiple calendars at the same time

Activity: Show and tell

In this activity, your teacher will demonstrate how to manage multiple calendars in Outlook.

Resources required

You will need the following resources for this activity:

- None

Microsoft

Activity instructions

Pay close attention as your teacher demonstrates the following tasks:

1. Create a new Outlook **Calendar**.

2. Hide and display calendars in the **Calendar** workspace.

3. Compare multiple calendars using side-by-side mode and **Overlay** mode.

Try-it: Manage multiple calendars

 In this standalone try-it activity, you'll create a new calendar and manage the display of multiple calendars.

Resources

You will need the following resources for this try-it:

• None

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. In the Outlook **Calendar** workspace, create a new calendar using the following information:

   o Name: **Munson's Summer Event Committee Calendar**
   o Folder contains: **Calendar Items**
   o Select where to place the folder: Select your default Outlook profile.

2. Select the **Munson's Summer Event Committee Calendar**, and then select **New Appointment** to create a new recurring appointment with the following information:

   o Start time and End time: Next Tuesday from **10:00 AM** to **11:00 AM**
   o Subject: **Event Committee Status Meeting**
   o Location: **Conference Room**
   o Reminder: **1 day**
   o Show As: **Busy**
   o Recurrence: Every Tuesday with no end date

3. In the Outlook **Calendar** workspace, create a new calendar using the following information:

   o Name: **Soccer Team Practice and Game Schedule**
   o Folder contains: **Calendar Items**
   o Select where to place the folder: Select your default Outlook profile.

Microsoft

4. Select **Soccer Team Practice and Game Schedule**, and then select **New Appointment** to create a new recurring appointment with the following information:

   o Start time and End time: Next Tuesday from **4:00 PM** to **5:00 PM**

   o Subject: **Team Practice**

   o Location: **Soccer field 1**

   o Reminder: **1 day**

   o Show As: **Busy**

   o Recurrence: Every Tuesday with no end date

5. Enable **Overlay** mode using only the **Munson's Summer Event Committee Calendar** and the **Soccer Team Practice and Game Schedule** calendars.

6. Review how the appointments display. (You might need to browse to the date on which you created the appointments.)

7. Switch back to side-by-side mode to display only the **Munson's Summer Event Committee Calendar** and the **Soccer Team Practice and Game Schedule** calendars.

Topic 2: Share calendars

When you're working on committees or project teams, you often need to share calendar information between team members. For example, at times you might need to only share available time and details from your calendar. Sometimes, you might go one step further and create a shared calendar for all team members to manage a project schedule. Depending on your specific requirements, Outlook provides several options for sharing and opening calendar information between users.
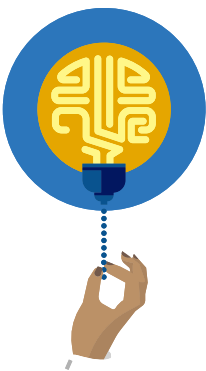
Did you know?

Many of Outlook's calendar-sharing features require a connection to a supported and configured email system such as Office 365 or Microsoft Exchange Server. Check with your email administrator to verify which features will work in your school or organization.

Microsoft

Open user and resource calendars

By default, all users in the same Office 365 or Microsoft Exchange organization have the ability to open and display user and resource calendars. However, only free/busy details will display, similar to what the **Scheduling Assistant** provides. You will not be able to observe, add, or edit any additional calendar details.
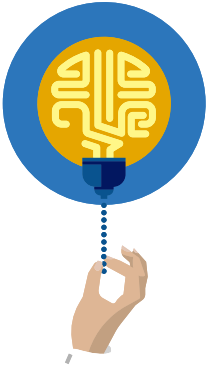
Did you know?

You can use the **Calendar Permissions** command on the **Home** or **Folder** tabs to change the default permissions assigned to your calendar to provide full access to other users in your organization. This is only recommended for specific scenarios and should be changed with caution. Consult with your email administrator on proper sharing policies within your school or organization.

To open another user's calendar or resource calendar, switch to the **Calendar** workspace, and then on the **Home** or **Folder** tabs of the ribbon, select **Open Calendar**. the following screenshot depicts the options in the **Open Calendar** drop-down menu.
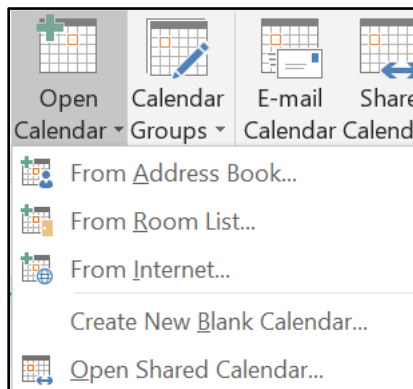
*Figure 28: **Open Calendar** options*

You can use the following **Open Calendar** options for opening other people's shared calendars:

- **From Address Book**. This option opens the **Address Book**, where you can select a contact name and open their shared calendar. You can also use this option to select resource calendars that have been configured as user accounts in Exchange.
- **From Room List**. Selecting this option opens a filtered display of the **Address Book** with only the configured room resources from the email system.
- **From Internet**. Use this option to open the **New Internet Calendar Subscription** dialog box, where you can connect to and open calendars that have been published to supported internet locations.

- **Create a New Blank Calendar**. This option creates a new calendar.
- **Open Shared Calendar**. This option prompts you to enter the name of a specific person or resource to open its shared calendar.
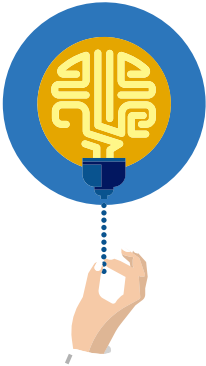
Did you know?

You can only open a user or resource's default calendar by using the **From Address Book** and **Open Shared Calendar** commands. Additional calendars must be directly shared with you with appropriate permissions assigned by the owner of the calendar.

Share calendars with users in your organization

Members of the same committee or project team often work with a shared calendar to manage schedules and organize meetings and events. As discussed previously, you can create additional calendars to support the scheduling needs of your project teams.

After creating a new calendar for the team, you need to share the calendar with users that require access and assign them appropriate permissions. To share a calendar, switch to the **Calendar** workspace and in the **Folder Pane** select the calendar. In the **Share** group, select **Share Calendar** as depicted in the following screenshot.
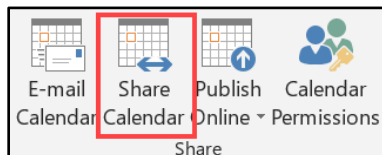
*Figure 29: **Share Calendar***

After you select **Share Calendar**, Outlook opens a **Sharing invitation** email message, as the following screenshot depicts.
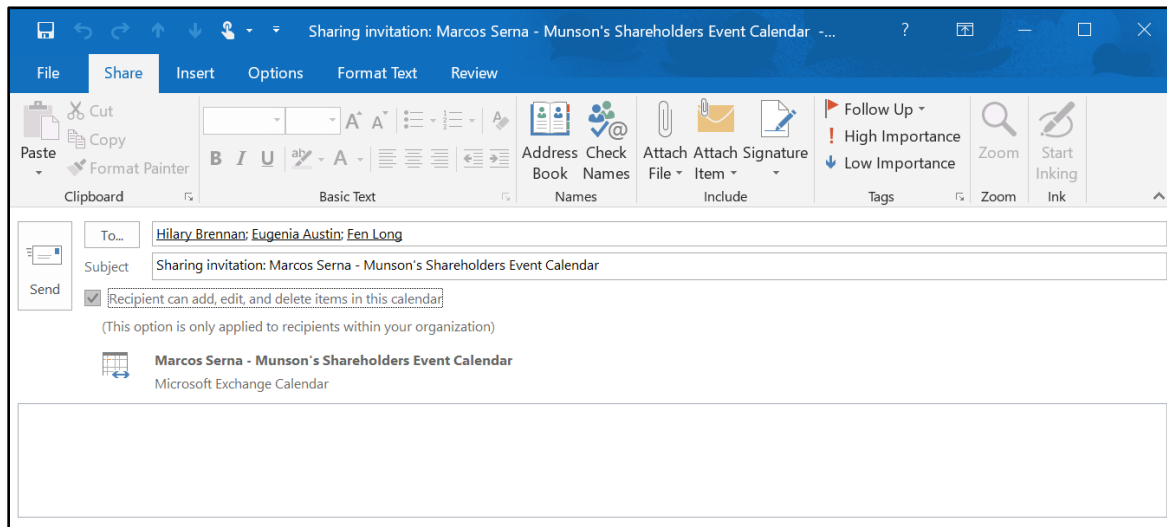
Figure 30: Sharing invitation email message

The **Sharing invitation** email contains the following options that you must fill out before sending the invitation to recipients:

- **To**. Enter the name or names of the users that should have access to the shared calendar.
- **Subject**. Enter a subject related to the invitation. By default, the subject line will be filled in with the name of the selected calendar to be shared.
- **Recipient can add, edit, and delete items in this calendar**. Select this check box to ensure that users can have full access to add and remove items from the calendar. If you don't select this check box, recipients have read-only access to the calendar.

After you send the invitation, all listed recipients receive the **Sharing invitation** email in their inbox. As the following screenshot depicts, recipients can select **Open this Calendar** to display the calendar in the **Calendar** workspace, and to add the calendar to their folder list.
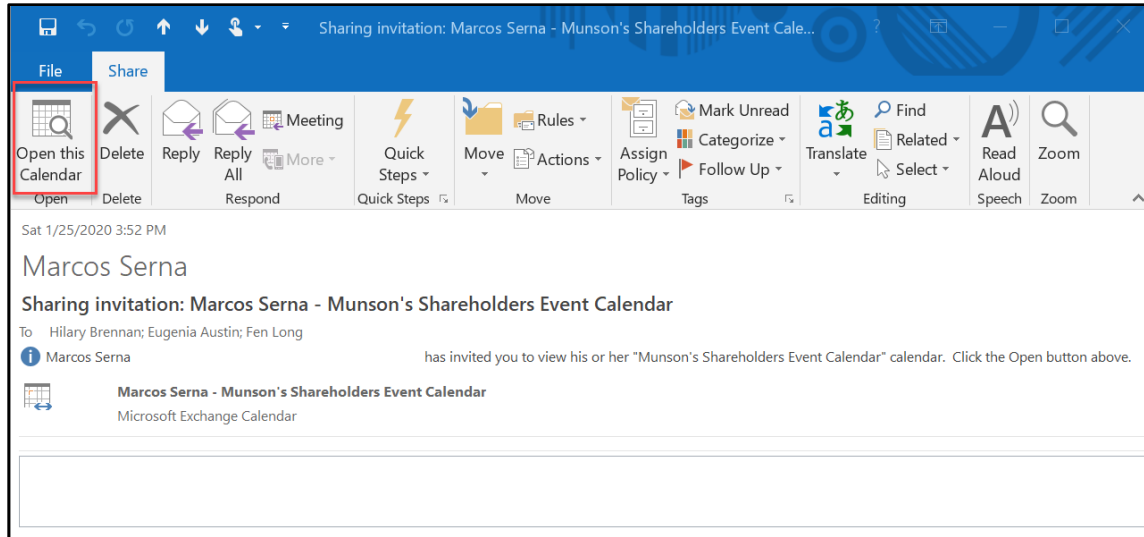
Figure 31: Sharing invitation received

Publishing calendar information to the internet

On occasion you might need to share calendar information with people outside of your organization. Outlook 2019 provides a feature to publish your calendar online to a WebDAV server. WebDAV is a common protocol used for file and calendar-hosting services. When you publish calendar information, you're still able to control the amount of information that is published and synchronized with the service.
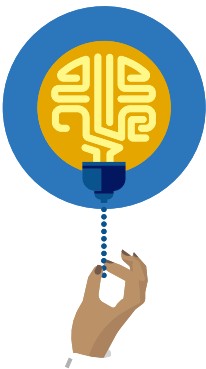
Did you know?

If you're connected to Office 365, you might observe the **Publish This Calendar** command. If you select this command, you're directed to your online account settings to configure calendar publishing using Office 365. Consult with your email administrator for more information about publishing calendars with Office 365.

To publish your calendar to a WebDAV server, on the **Home** tab, in the **Share** group, select **Publish Online**, and then select **Publish to WebDAV Server**. The **Publish Calendar to Custom Server** dialog box opens as depicted in the following screenshot.
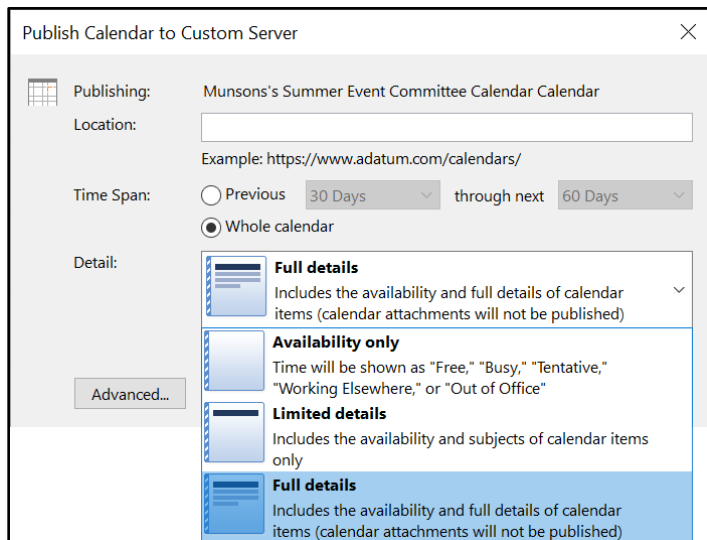
Figure 32: Publish calendar details

In the **Publish Calendar to Custom Server** dialog box, complete the following fields:

- **Location**. Enter the URL of the online WebDAV sharing service.
- **Time Span**. Select the amount of time that you want to publish online. By default, **Whole calendar** is selected. However, you can specify a specific range of time to minimize the amount of information published.
- **Detail**. Select the amount of detail that you want to publish online. Options include:
  - o **Availability only**. Only displays **Free**, **Busy**, **Tentative**, **Working Elsewhere**, or **Out of Office**.
  - o **Limited details**. Includes availability indicators, but also includes the subject of each calendar item.
  - o **Full details**. Includes all availability and provides full details of calendar items.
- **Advanced**. Provides more advanced settings, including update frequency and whether you want to include details of items that are marked private.

Activity: Show and tell

In this activity, your teacher will demonstrate how to share an Outlook **Calendar**.

Resources required
You will need the following resources for this activity:

- None

Activity instructions

Pay close attention as your teacher demonstrates the following tasks:

1. Open a user's calendar to display default information.

2. Create a new Outlook **Calendar**.

3. Share an Outlook **Calendar** with a group of users.

Try-it: Share calendars

In this standalone try-it activity, you'll create a new calendar and then share a calendar with a partner.

Resources

You will need the following resources for this try-it:

- A partner as assigned by your teacher.
- Email addresses for each of your assigned partners.

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. **Partner 1 only**: In the Outlook **Calendar** workspace, create a new calendar using the following information:

   o Name: **Munson's Media Booking Calendar**
   o Folder contains: **Calendar Items**
   o Select where to place the folder: Select your default Outlook profile.

2. **Partner 2 only**: In the Outlook **Calendar** workspace, create a new calendar using the following information:

   o Name: **Munson's Honey Festival Committee Calendar**
   o Folder contains: **Calendar Items**
   o Select where to place the folder: Select your default Outlook profile.

3. **Partner 1 only**: Share the **Munson's Media Booking Calendar** with **Partner 2**. Choose to allow your partner to add, edit, and delete items in the calendar.

4. **Partner 2 only**: Share the **Munson's Honey Festival Committee Calendar** with **Partner 1**. Choose to allow your partner to add, edit, and delete items in the calendar.

5. From your inbox, review the **Sharing invitation** email received from your partner and then open the shared calendar. Verify that the calendar is displayed in your folder list.

Microsoft

Topic 3: Create calendar groups

You can use a calendar group to organize and display several calendars at the same time. For example, you might find it beneficial to create a calendar group that contains your project team's individual calendars. By doing so, you can quickly observe everyone's calendars at the same time to determine availability.

To create a calendar group, on the **Home** tab of the ribbon, select **Calendar Groups**, as in the following screenshot.
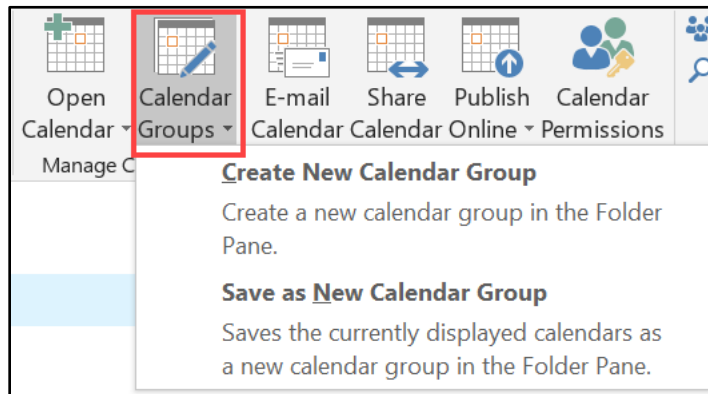
*Figure 33: Creating a **Calendar Group***

When you select **Calendar Groups**, two options are available:

- **Create a New Calendar Group**. Select this option to create a new calendar group of user's default calendars. When you select this option, you're prompted to provide a name for the group and then select team members from the address list.
- **Save as New Calendar Group**. Select this option to create a new calendar group from a set of selected calendars in your folder pane. This option is for organizing calendars that you might already have in your folder list, and which you frequently review at the same time.

Microsoft

The following screenshot depicts an example of a calendar group named **Event Planning Team Members**. This calendar group contains four calendars that are displayed in the **Calendar** workspace.
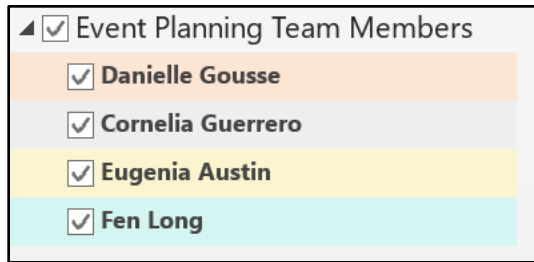
*Figure 34: Calendar group listed in the **Folder Pane***

As discussed previously, you can select or clear the check box next to each user calendar to enable or disable the calendar in the workspace.

To remove a calendar group, right-click or access the context menu for the group name and then select **Delete Group**. Be careful with this option, because if you select it, all calendars within the group will also be removed from your folder list. If you need to keep the attached calendars in your folder list, move the calendars to an alternate group before deleting the current group.

Video

To review the video on how to use a calendar group, go to: Create, view, or delete a calendar group

Activity: Tell a story

In this activity, your teacher will describe a scenario and perform a demonstration to help you understand how to create a calendar group.

Resources required
You will need the following resources for this activity:

• None

Activity instructions

You teacher will use the Outlook **Calendar** to create a calendar group. Pay close attention as your teacher explains and demonstrates the following tasks:

1. Open recipient Outlook calendars.

2. Create a new calendar group using the address book.

3. Create a new calendar group using existing recipient calendars in the folder list.

Try-it: Create calendar groups

In this standalone try-it activity, you'll create a new calendar group and add group members.

Resources

You will need the following resources for this try-it:

- Three partners as assigned by your teacher.

- Email addresses for each of your assigned partners.

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. In the Outlook **Calendar** workspace, create a new calendar group using the following information:

   o Name: **Munson's Executive Group Calendar**

   o Members: Add your partner's names to the calendar group

2. Review the folder list to verify that the group is created and that your partners are members of the group.

Wrap-up

Use these questions to check what you learned in this lesson:

1. You can use the _____ command to share a calendar with a user in your organization.

   Fill in the blank space.

2. A _____ is used to organize and display multiple calendars together.

   Fill in the blank space.

3. By default, when you share your calendar, users have permission to create new calendar items.

   Select the correct option.

   a. True

   b. False

4. When you delete a calendar group, all group members automatically move to the **My Calendars** group.

   Select the correct option.

   a. True

   b. False

5. You can use the **Publish Online** command to share calendar information with internet users.

   Select the correct option.

   a. True

   b. False

Microsoft

Lesson 5: Printing and sharing your availability

Overview

In this lesson, you'll learn about the various formats you can use to print your calendar information. You'll also learn how to share calendar availability by emailing information to users. Finally, you'll learn how to configure automatic reply settings for email communication.

Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Describe the difference between the **Availability only** and **Limited details** settings when you send a calendar by email.

   Fill in the blank space.

2. You can set separate automatic reply settings for inside your organization and outside of your organization.

   Select the correct option.

   a. True

   b. False

3. Which of the following are default printing styles for an Outlook calendar?

   Select all that apply.

   a. **Tri-fold Style**

   b. **Weekly Calendar Style**

   c. **Yearly Style**

   d. **12-hour Style**

   e. **Weekly Agenda Style**

Topic 1: Print calendar information

There might be times when you need to take a copy of your Outlook **Calendar** with you, especially when you're away from your computer or device. Outlook has several printing styles that you can select from and print. Calendar print options also provide flexibility on what exactly you print for your calendar details.

To print your calendar information, perform the following tasks:

1. From the **Calendar** workspace, arrange the calendar to display the date range to be printed.

2. On the ribbon, select the **File** tab and then select **Print**.

3. As the following screenshot depicts, you can select the printer to print from, modify **Print Options**, and select from a variety of print styles.
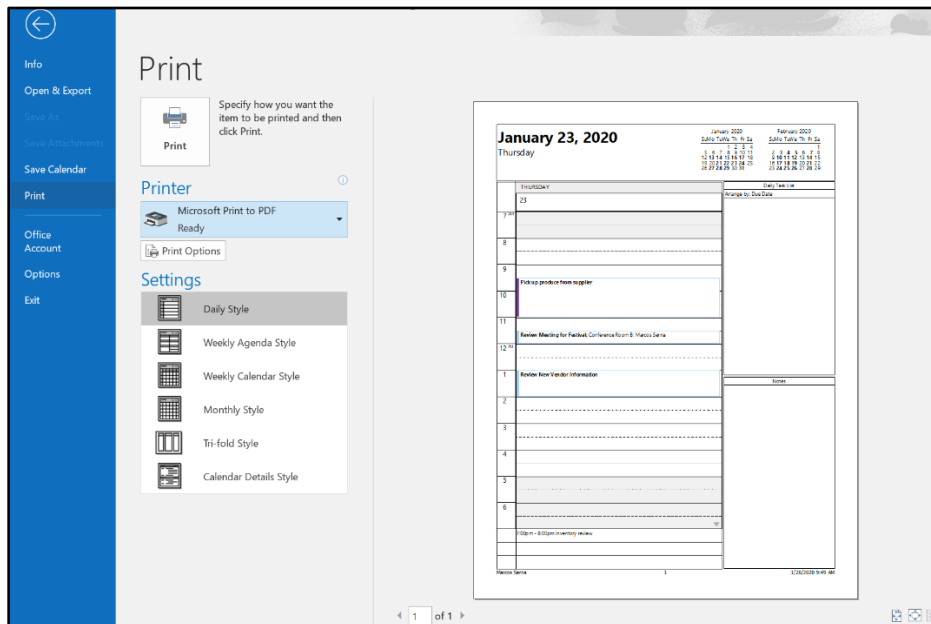
Figure 35: Print Calendar

Outlook Calendar print styles

Outlook provides many different print styles to choose from. Table 2 describes each of the default styles available in the Outlook **Calendar**.

Daily Style	This style prints the calendar details for a single day, and includes a daily task list and a notes section.
Weekly Agenda Style	Use this style to print a week of calendar details in a format similar to a day planner.
Weekly Calendar Style	This style will print a week of calendar details in a format similar to the Week view of the Calendar workspace.
Monthly Style	This style prints your calendar items as a full month calendar.
Tri-fold Style	Use this style to print your calendar items in three columns, including hourly appointments, a daily task list, and a week summary.
Calendar Details Style	This style prints full details of your calendar items grouped by day.

Table 2: Calendar print styles
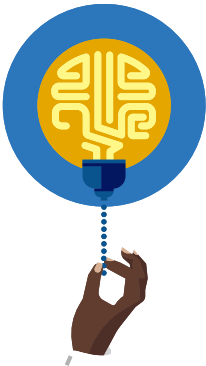
Did you know?

You can edit each of the default styles to change style elements such as the font, layout, and header/footer settings. You can also copy the default styles and create new styles to meet your specific printing requirements.

Microsoft

Define print options

Print options provide additional settings that you can use to print only what you specifically need. The following screenshot depicts the print options for Outlook calendars.
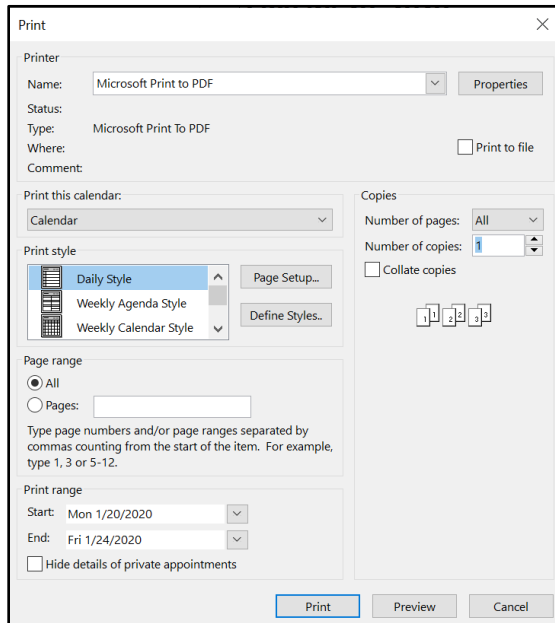
Figure 36: Print options

Calendar-specific printing settings include the following:

- **Print this calendar**. Select a specific calendar to print from your folder list.
- **Print style**. Modify and define new print styles. You can also modify certain elements of the default styles.
- **Print range**. Specify the start and end date for the calendar printout.
- **Hide details of private appointments**. Select this check box to ensure that any appointment tagged with the private setting will not display any details in the printout.

Additional information

For more information on printing your calendar, go to: Print a calendar showing appointments and meetings

Activity: Popcorn

In this activity, your teacher will display various print styles on the overhead projector.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Pay close attention as your teacher displays various calendar print styles. When you know the style being displayed, call out "Popcorn" and provide your answer. The styles that you can choose from include:

- **Daily Style**
- **Weekly Agenda Style**
- **Weekly Calendar Style**
- **Monthly Style**
- **Tri-fold Style**
- **Calendar Details Style**

Try-it: Print calendar information

In this standalone try-it activity, you'll print your calendar information using various print styles.

Resources

You will need the following resources for this try-it:

- None

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. In the Outlook **Calendar** workspace, display a date range that contains various appointments, meetings, or events.

2. Print your calendar using the following options:

   o Printer: **Microsoft Print to PDF** (If you do not have this option, check with your teacher for guidance on which printer to use.)

   o Settings: **Weekly Agenda Style**

o   Print Options: **Hide details of private appointments**

o   Save Print Output As: Select a location as directed by your teacher.

3. Print your calendar again using the following options:

o   Printer: **Microsoft Print to PDF** (If you do not have this option, check with your teacher for guidance on which printer to use.)

o   Settings: **Monthly Style**

o   Save Print Output As: Select a location as directed by your teacher

4. Create and send a new email message with the following options:

o   To: Your own email address

o   Subject: **Calendar PDF Printouts**

o   Attach File: Attach the two PDF files that you saved in the previous steps.

Topic 2: Send availability in an email message

In *Lesson 4: Coordinating your schedule with others*, you primarily focused on ways to share your calendar with people within your organization. To share calendar information with people outside of your organization, Lesson 4 also explained how to publish calendar information to an online service location.

Another way you can send calendar availability is in an email message. The primary benefit of this method is that you can send information to anyone without requiring any specific online service. However, calendar information that you email is a static snapshot of your calendar. It won't update automatically when you make changes to your calendar in Outlook.

To email your calendar information, switch to the **Calendar** workspace. On the **Home** tab, select **Email Calendar**. The **Send a Calendar via Email** dialog box opens as in the following screenshot.
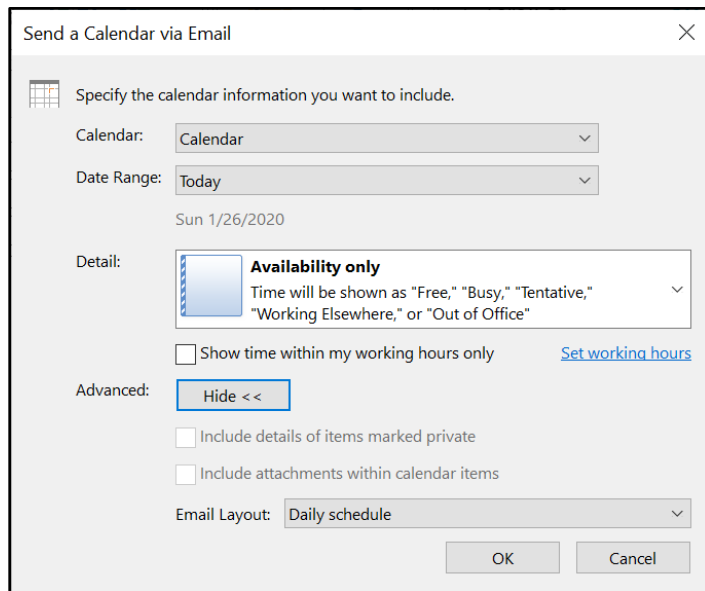
Figure 37: ***Send a Calendar via Email*** *dialog box*

The options in the **Send a Calendar via Email** dialog box include:

- **Calendar**. Select the calendar that you want to email.
- **Date Range**. Select a date range such as **Today**, **Tomorrow**, **Next 7 days**, **Next 30 days**, **Whole calendar**, or a specified date range.
- **Detail**. Select the amount of detail that you want to include in the email message. Your options include:
  - **Availability only**. This setting only displays **Free**, **Busy**, **Tentative**, **Working Elsewhere**, or **Out of Office**.
  - **Limited details**. Select this setting to include availability indicators, but also to include the subject of each calendar item.
  - **Full details**. This setting includes all availability and provides full details of the calendar items.
  - **Show time within my working hours only**. Use this setting to help ensure that only calendar items within your specified working hours are included in the email.
- **Advanced**. This option provides more advanced settings such as:
  - **Include details of items marked private**. Select this option to include details for calendar items that have been tagged with the private setting. This option is only available when you select **Limited details** or **Full details**.

- o **Include attachments with calendar items**. Select this option to include additional attachments such as agenda or supplemental information for appointments or meetings.
- o **Email Layout**. Specify the layout for the calendar information in the email. Your options include **Daily schedule** or **List of events**.

After specifying the **Send Calendar via Email** options, an email message is created. The following screenshot depicts an example of calendar information being sent via an email message.
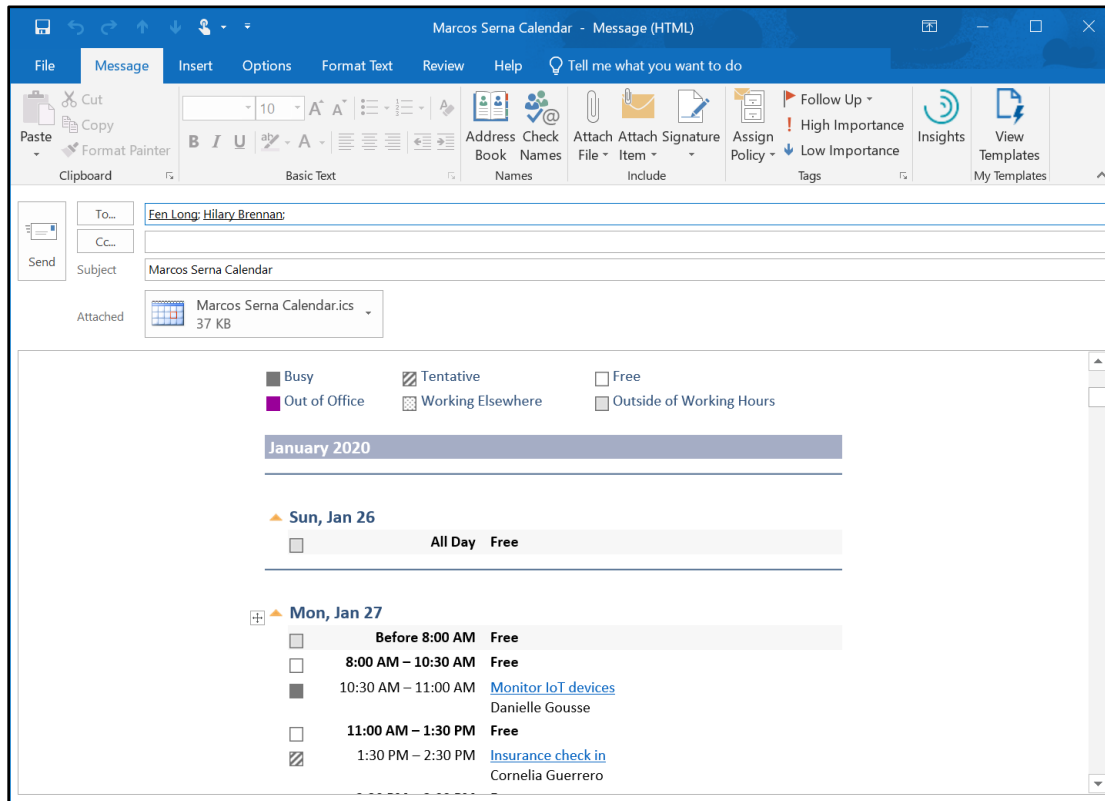
Figure 38: Sending calendar information in an email message
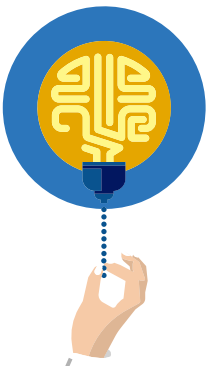
Did you know?

When you send your calendar as an email message, an attachment is included, which is your calendar information in iCalendar (.ics) format. This is a universal calendar file format and you can open it on various email and calendar platforms.

Additional information

For more information on sending your calendar details as an email message, go to: [Send an Outlook calendar in an email message](#)

Activity: Tell a story

In this activity, your teacher will describe and demonstrate a scenario to help you understand how to send calendar information in an email message.

Resources required
You will need the following resources for this activity:

- None

Activity instructions
You teacher will send calendar information in an email message. Pay close attention as your teacher explains and demonstrates the following tasks:

1. Display the Outlook **Calendar** information.

2. Email calendar information using the email calendar options.

Try-it: Send availability in an email message

In this leveled try-it activity, you'll send your calendar availability information in an email message.

Try-it 1

Resources
You will need the following resources for this try-it:

- One or more partners as assigned by your teacher.
- Email addresses for each of your assigned partners.

Instructions

The following steps are the general tasks that you need to perform during this try-it:

- In the Outlook **Calendar**, email your calendar information using the following information:
  - Date Range: **Next 7 days**
  - Detail: **Availability only**
  - To: Add the email addresses of your assigned partners

Try-it 2

Resources

You will need the following resources for this try-it:

- One or more partners as assigned by your teacher.
- Email addresses for each of your assigned partners.

Instructions

The following steps are the general tasks that you need to perform during this try-it:

- In the Outlook **Calendar**, email your calendar information using the following information:
  - Date Range: **Next 30 days**
  - Detail: **Full details**
  - To: Add the email addresses of your assigned partners
  - Email Layout: **List of events**

Topic 3: Create automatic replies

Hopefully, there are times when you can take a break from email and a busy schedule. If you're on vacation or don't have access to email, you can configure automatic replies to notify others that you're not available to respond to messages.

Microsoft
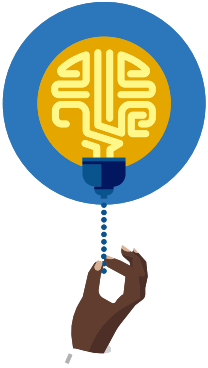
Did you know?

Automatic replies are also commonly known as *Out of Office messages*.

To create an automatic reply in Outlook, select the **File** menu, and then on the **Info** tab, select **Automatic Replies**. The following screenshot depicts an example of the **Automatic Replies** dialog box that opens.

Figure 39: Configuring automatic replies

When you configure automatic replies, consider the following options:

- **Do not send automatic replies**. Select this option to disable automatic replies. This is the default setting.
- **Send automatic replies**. Select this option to enable automatic replies. You can also select the **Only send during this time range** check box. This option provides a start time and an end time to the automatic replies.

- **Inside My Organization**. Use this section to enter an automatic reply message to anyone that sends you an email message from within the same organization as you. This option is only available if you're connected to an email system such as Office 365 or Exchange.

- **Outside My Organization**. Use this section to enter an automatic reply message to anyone that sends you an email message from outside of your organization. You can also specify to only automatically reply to contacts, or to anyone outside of your organization.

- **Rules**. Use this option to configure and apply rules to email messages that you receive while the **Automatic Replies** feature is active. For example, along with enabling **Automatic Replies**, you might want to enable a rule to automatically move all messages received from project committee members to a specific folder in Outlook.
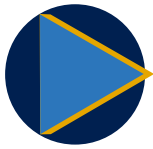
Video

To review the video on configuring an automatic reply, go to: Set-up an automatic reply

Activity: Show and tell

In this activity, your teacher will demonstrate how to configure automatic replies in Outlook.

Resources required
You will need the following resources for this activity:

- None

Activity instructions
Pay close attention as your teacher demonstrates the following tasks:

1. Enable and create an automatic reply for inside and outside of the organization.

2. Configure a start and end time for the automatic reply.

Try-it: Create automatic replies

In this leveled try-it activity, you'll enable and configure an automatic reply in Outlook.

Try-it 1

Resources

You will need the following resources for this try-it:

- One or more partners as assigned by your teacher.
- Email address for yourself and for each of your assigned partners.

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. In Outlook, create an automatic reply using the following information:

   o   Send automatic replies: **Enabled**

   o   Inside My Organization: **Hi there. I am out of the office for a produce seminar in Seattle. I will be gone until Friday. If you need to contact me, text me on my phone.**

   o   Outside My Organization: **I am out of the Office until Friday. For urgent matters please contact the main office and they will direct you to an appropriate person.**

   o   Auto-reply to people outside my organization: **Enabled**

   o   Anyone outside my organization: **Enabled**

2. Direct a partner to send you an email message to verify that the automatic reply works as expected.

Try-it 2

Resources

You will need the following resources for this try-it:

- None

Instructions

The following steps are the general tasks that you need to perform during this try-it:

- In Outlook, modify the automatic reply settings to only send replies during the following time range:

   o   Start time: Next Monday at **8:00 AM**

   o   End time: Next Friday at **5:00 PM**

■■ Microsoft

Wrap-up

Use these questions to check what you learned in this lesson:

1. The _____ style prints the calendar details for a single day and includes a daily task list and a notes section.

   Fill in the blank space.

2. The _____ format is a universal calendar file format that various email and calendar platforms use.

   Fill in the blank space.

3. The **Availability only** setting includes all availability and subject names for each calendar item.

   Select the correct option.

   a. True

   b. False

4. By default, when you send your calendar details through email, items marked with the private tag are included.

   Select the correct option.

   a. True

   b. False

5. **Automatic Replies** can respond to email messages sent either from inside your organization or outside of your organization.

   Select the correct option.

   a. True

   b. False

Detach the module .pst file

After you complete all try-its, you must detach your .pst file so your teacher can assess your work. To do this:

1. In Outlook, on the **Navigation Bar**, select the ellipsis (**Navigation Menu** button), and then select **Folders**.

2. Locate the folder named **M5_module_PST_starter_ *Firstname_Lastname***, and right-click or access the context menu for the folder.

■■ Microsoft

3. On the context menu, select **Close**
    "**M5_module_PST_starter_*Firstname_Lastname*.**"

4. On your computer, open **File Explorer**, and then browse to where the .pst file
    resides.

5. Right-click or access the context menu for the file, and then select **Rename**.

6. Append your name to the end of the existing file name by using underscores instead
    of spaces. For example, enter _ ***Firstname_Lastname***. The filename should now
    resemble **M5_module_PST_starter_ *Firstname_Lastname***.

7. Copy the .pst file to the designated location for assessment.

Glossary

Appointment	A scheduled activity in the Outlook **Calendar** that doesn't include other attendees or resources.
Calendar group	Used to organize and display several calendars simultaneously.
Event	A scheduled activity that doesn't have a specific start and end time, and is blocked out for the entire day or for multiple days.
Meeting	A scheduled appointment that involves inviting other people or resources.
Overlay mode	A display setting in the Outlook **Calendar** that merges multiple calendars on top of each other.
Recurrence	An Outlook **Calendar** item such as an appointment, event, or meeting that repeats at regular intervals throughout the calendar.
Resource	An account or email system configuration that represents a room or piece of equipment that can be reserved for meetings.
Side-by-side mode	A display setting in the Outlook **Calendar** that displays multiple calendars next to each other.

Table 3: Glossary terms and definitions

Microsoft

Cornerstone

Cornerstone

Overview

The Honey Fest at Munson's Pickles and Preserves Farm is coming up soon and it will require quite a bit of planning. Several volunteers have already registered for their participation. Most of the farm employees will also be chipping in and helping with the festival. To manage everything smoothly, you'll use the Outlook **Calendar** to manage appointments, events, and meetings.

Objectives

The following table outlines the cornerstone objectives and their corresponding Microsoft Office Specialist (MOS) exam objectives.

Cornerstone project objectives	Exam OD
Create appointments and events.	• 3.1.1: Set calendar work times • 3.2.1: Create recurring calendar items • 3.2.4: Set calendar item times and time zones • 3.2.6: Set availability for calendar items • 3.3.2: Configure reminders
Create and manage meetings.	• 3.2.2: Cancel meetings • 3.2.3: Create calendar items from messages • 3.2.5: Set up meetings by using the scheduling assistant • 3.3.1: Forward calendar items • 3.3.3: Invite meeting recipients • 3.3.4: Respond to invitations • 3.3.5: Update individual or recurring calendar items
Manage multiple calendars.	• 1.1.1: Change the display of messages, calendar items, contact records, and tasks • 3.1.2: Manage multiple calendars

Microsoft

Cornerstone project objectives	Exam OD
Share calendar details and availability.	• 1.1.3: Configure automatic replies • 1.4.1: Print message, calendar, contact, and task information

Table 4: Cornerstone objectives

Duration

50 minutes

Attach the Cornerstone .pst file

To complete this cornerstone, before you can perform any tasks you must attach the Cornerstone .pst file into Outlook. You'll also store the results of your tasks in this .pst file so that your teacher can assess your work by examining the file.

To open the .pst file in Outlook:

1. Open Outlook.

2. Select the **File** tab, and then select **Open & Export**.

3. In the **Open** pane, select **Open Outlook Data File**.

4. In the **Open Outlook Data File** dialog box, use the navigation pane to locate the .pst file provided by your instructor for your use throughout this module of the course.

5. Open the file named **M5_cornerstone_PST_starter**. Note that a folder named **M5_cornerstone_PST_starter** is now available in the navigation pane. This folder contains any required starter elements for the cornerstone, such as email, calendar appointments, tasks, and contacts.

6. Right-click or access the context menu for the **M5_cornerstone_PST_starter** folder, and then select **Data File Properties**.

7. In the **M5_cornerstone_PST_starter Properties** dialog box, select **Advanced**.

8. In the **Outlook Data File** dialog box, in the **Name** box, append your name to the end of the existing name by using underscores instead of spaces. For example, enter **_Firstname_Lastname**. The folder name should now resemble **M5_cornerstone_PST_starter_Firstname_Lastname**.

9. Select **OK** twice.

Microsoft

Copy content into the Cornerstone .pst file

As you proceed through this cornerstone's tasks, you should copy the resulting elements—such as email, calendar appointments, tasks, and contacts—to the **M5_cornerstone_PST_starter_*Firstname_Lastname*** folder by using the following instructions:

1. After you attach the .pst file, you should find duplicate folders for items such as email, calendar appointments, tasks, and contacts.

2. After you complete a try-it exercise, select your resulting items in the navigation pane. Make sure you select the items that are associated with your email account.

3. In the details pane, right-click or access the context menu for each item, and then either select **Copy** or select Ctrl+C.

4. Select the **M5_cornerstone_PST_starter_*Firstname_Lastname*** folder.

5. Select Ctrl+V to copy the item to the .pst file.

6. Repeat steps 3 through 5 for any additional items that you want to copy.

Instructions

1. Complete the tasks for each file.

2. When you're done with the cornerstone, assess your completion and enter the points you think you earned within the Task list. You can ask for the help of your teacher if required.

Tasks

The following steps are the tasks you need to do in this cornerstone.

Task 1: Create appointments and events (12 points)

Note: Complete the following steps in your
M5_cornerstone_PST_starter_*Firstname_Lastname* Calendar.

1. Configure your Outlook **Calendar** work time as follows: (2 points) (Exam objective: 3.1.1)

   o Start time: **9:00 AM** or **09:00**
   o End time: **5:00 PM** or **17:00**
   o Work week: Monday to Friday

2. In the Outlook **Calendar**, create a new appointment with the following details: (5 points) (Exam objectives: 3.2.4, 3.2.6, 3.3.2)

   o Subject: **Pick up Honey Fest pamphlets from print vendor**
   o Location: **Print Vendor**
   o Start time: **Tomorrow at 10:30 AM** or **10:30**
   o End time: **Tomorrow at 11:30 AM** or **11:30**
   o Show As: **Busy**
   o Reminder: **30 minutes**
   o Time Zones: your current time zone

3. In the Outlook **Calendar**, create a recurring all-day event with the following details: (5 points) (Exam objectives: 3.2.1, 3.2.4, 3.2.6, 3.3.2)

   o Subject: **Annual Honey Fest**
   o Location: **Munson's event center**
   o Start time: **Second Monday in April**
   o End time: **Third Friday in April**
   o Show As: **Out of Office**
   o Reminder: **1 day**
   o Recurrence: **Every year on the second Monday in April**
   o Range of recurrence: No end date

Points scored: _____ / 12

Task 2: Create and manage meetings (15 points)

Note: Complete the following steps with a partner as assigned by your teacher, in your **M5_cornerstone_PST_starter_*Firstname_Lastname*** Calendar.

1. **Partner 1 only**: Create and send a new meeting invitation with the following details: (5 points) (Exam objectives: 3.2.5, 3.3.3)

   o To: Your partner's email address

   o Subject: **Honey Fest Status Meeting**

   o Location: **Conference Room 1**

   o Scheduling Assistant: Use the **Scheduling Assistant** and verify that the following time period is available for your partner:

   • Start time: Tomorrow at **1:00 PM** or **13:00**

   • End time: Tomorrow at **2:00 PM** or **14:00**

   o Show As: **Busy**

   o Reminder: **30 minutes**

2. **Partner 2 only**: Create and send a new meeting invitation with the following details: (5 points) (Exam objectives: 3.2.5, 3.3.3)

   o To: Your partner's email address

   o Subject: **Budget Review for Honey Fest**

   o Location: **Conference Room 1**

   o **Scheduling Assistant**: Use the **Scheduling Assistant** and verify that the following time period is available for your partner:

   • Start time: Tomorrow at **3:00 PM** or **15:00**

   • End time: Tomorrow at **4:00 PM** or **16:00**

   o Show As: **Busy**

   o Reminder: **30 minutes**

3. Respond to your partner's meeting invitation by accepting the meeting request and sending the response now. (2 points) (Exam objective: 3.3.4)

4. Forward your partner's meeting invitation to your teacher's email address. (2 points) (Exam objective: 3.3.1)

5. **Partner 1 only**: Create and send a new email message with the following details: (2 points)

   o   To: Your partner's email address
   o   Subject: **Lunch Meeting**
   o   Details: **Hi there! Can you set up a time for us to meet for lunch to discuss the upcoming Honey Fest details? Thanks!**

6. **Partner 2 only**: Create and send a new email message with the following details: (2 points)

   o   To: Your partner's email address
   o   Subject: **Review Print Media**
   o   Details: **We need to meet at the publishing company to review the print media. See you there!**

7. Very that you have received the email message from your partner and then reply with a meeting request. Use the **Scheduling Assistant** to invite your partner and schedule an appropriate time for next Wednesday. (2 points) (Exam objective: 3.2.3)

8. **Partner 1 only**: Cancel the **Review Print Media** meeting. (2 points) (Exam objective: 3.2.2)

9. **Partner 2 only**: Cancel the **Lunch Meeting**. (2 points) (Exam objective: 3.2.2)

Points scored: _____ / 15

Task 3: Manage multiple calendars (8 points)

1. Create a new calendar named **Honey Fest Committee Calendar**. Store the calendar in your **M5_cornerstone_PST_starter_*Firstname_Lastname*** folder. (2 points) (Exam objective: 3.1.2)

2. Create a new calendar named **Budget Committee Calendar**. Store the calendar in your **M5_cornerstone_PST_starter_*Firstname_Lastname*** folder. (2 points) (Exam objective: 3.1.2)

3. Select both the **Budget Committee Calendar** and the **Honey Fest Committee Calendar**, and create a new calendar group named **Munson's Calendars**. (2 points) (Exam objective: 3.1.2)

4. Select all the calendars in the **Munson's Calendars** group, and then change the display to **Overlay** mode. (2 points) (Exam objective: 1.1.1)

Points scored: _____ / 8

Task 4: Share calendar details and availability (5 points)

1. In Outlook, create an automatic reply with the following details: (3 points) (Exam objective: 1.1.3)

   o Only send automatic replies starting next **Monday at 8:00 AM** or **08:00** and ending next **Friday at 5:00 PM** or **17:00**.

   o Inside My Organization message: **I am out of the office. If you have any questions, contact Marcos as he is handling all the details while I am away.**

   o Outside My Organization message: **Sorry, I am out of the office until next Friday. I will check my email periodically for urgent messages.**

2. Print your calendar details with the following settings: (2 points) (Exam objective: 1.4.1)

   o Settings: **Weekly Agenda Style**

   o Printer: Select **Microsoft Print to PDF**. Save the PDF file in a location for use in the next step. (If this option is not available, consult with your teacher.)

3. Email the PDF file to yourself as an attachment, and then move the email message with attachment to the **M5_cornerstone_PST_starter_*Firstname_Lastname*** folder.

Points scored: _____ / 5

TOTAL POINTS: _____ / 40

Detach the Cornerstone .pst file

After you complete all tasks, you must detach your .pst file so that your teacher can assess your work. To do this:

1. In Outlook, on the **Navigation Bar**, select the ellipsis (**Navigation Menu** button), and then select **Folders**.

2. Locate the folder named **M5_cornerstone_PST_starter_Firstname_Lastname**, and right-click or access the context menu for the folder.

3. On the context menu, select **Close M5_cornerstone_PST_starter_*Firstname_Lastname***.

4. On your computer, open **File Explorer**, and browse to where the .pst file resides.

5. Right-click or access the context menu for the file, and then select **Rename**.

6. Append your name to the end of the existing file name by using underscores instead of spaces. For example, enter **_*Firstname_Lastname***. The filename should now resemble **M5_cornerstone_PST_starter_*Firstname_Lastname***.

7. Copy the .pst file to the designated location for assessment.

Microsoft

Student Guide

40569A
Microsoft Outlook associate 2019

Module 6: Creating and managing contacts

Contents

Microsoft

Microsoft

Module overview

Description

To communicate with your friends, colleagues, suppliers, or customers, you need to have their email addresses, telephone numbers, and other contact information. You can maintain and access this information by using **Contacts** in Microsoft Outlook 2019. In Outlook, you can manage all aspects of your contacts, and even synchronize them across your other devices, including your phone.

Additional information

If you use the Outlook app on your iOS or Android phone, you can synchronize your contacts to and from your Microsoft email account, whether it's a personal account or a Microsoft 365 account.

The following table outlines the lessons in this module and their corresponding learning objectives.

Lesson	Learning objective	Exam objective(s)
Creating and updating contacts	Add a contact from an email, create and update contacts, and import contacts from external sources.	1.1.1 4.1.1 4.1.2
Using contact groups	Create, update, and delete contact groups.	4.2.1 4.2.2 4.2.3 4.2.4
Sharing contacts	Create, share, and print contact information.	1.4.1 2.3.2 4.1.3

Lesson	Learning objective	Exam objective(s)
Managing contacts	Categorize and flag contacts, and review contacts by category and follow-up flag.	None
Cornerstone: Managing volunteer contact details	Create, share, and manage contacts and contact groups.	All of the above

Table 1: Objectives by lesson

Scenario

Munson's Pickles and Preserves Farm hosts many community events, and it relies on volunteers to help. The volunteer coordinator at the farm manages the volunteers' contact details, availability, and other information. In your role as the intern, it's now your job to assist the volunteer coordinator by managing the volunteer program communications. To prepare for next season, you need to administer the farm volunteer contact list and keep the volunteer coordinator informed.

Cornerstone

This module concludes with a cornerstone in which you'll work with contacts and contact groups. During the cornerstone, you will:

- Create and update contacts.
- Use contact groups.
- Share and categorize contacts.

Microsoft

Lesson 1: Creating and updating contacts

Overview

As your list of contacts grows, you might need to update contact details from time to time. By doing so, you can keep track of changes to your contacts' information, and manage your contacts better. In this lesson, you will learn how to create and update your contacts.

Warm-up

Ask your neighbor if they have any questions about the topics covered in the previous module. Help them if you can, and then use these questions to find out what you already know about this lesson's topics.

1. You must define a contact's email address before you can save the contact.

   Select the correct option.

   a. True

   b. False

2. Which of the following options can you not assign as tags to contacts?

   Select the correct option.

   a. Views

   b. Categories

   c. Follow Ups

   d. Private

3. What element can you assign to a contact for the purpose of signing email messages that you send them?

Select the correct option.

   a. A password

   b. A certificate

   c. A picture

   d. A full name

4. The _____ property in a contact determines how a contact displays in a list.

Fill in the blank space.

5. You can use the _____ option to locate a contact's address on a digital map.

Fill in the blank space.

6. By using the _____ view, you can observe a simple pictorial summary of a contact's critical details.

Fill in the blank space.

Attach the module .pst file

To provide the most effective learning experience, this module includes several starter elements such as emails, calendar appointments, tasks, and contacts. These elements are stored in an external Outlook Data File, or .pst file. It resides in a location that your teacher will provide. To complete this module, you must attach this .pst file into Outlook before you can perform any try-its. You'll also store the results of your try-its in this .pst file. This allows your teacher to assess your work by examining the .pst file's contents.

To open the .pst file in Outlook:

1. Open Outlook.

2. Select the **File** tab, and then select **Open & Export**.

3. In the **Open** pane, select **Open Outlook Data File**.

4. In the **Open Outlook Data File** dialog box, use the navigation pane to locate the .pst files provided by your instructor for your use throughout this module of the course.

5. Open the file named **M6_module_PST_starter**. Note that a folder **M6_module_PST_starter** is now available in the navigation pane. This folder contains any required starter elements for the module, such as emails, calendar appointments, tasks, and contacts.

6. Right-click or access the context menu for the **M6_module_PST_starter** folder, and then select **Data File Properties**.

7. In the **M6_module_PST_starter Properties** dialog box, select **Advanced**.

8. In the **Outlook Data File** dialog box, in the **Name** box, append your name to the end of the existing name by using underscores instead of spaces. For example, enter **_Firstname_Lastname**. The folder name should now resemble **M6_module_PST_starter_Firstname_Lastname**.

9. Select **OK** twice.

Copy content into the module .pst file

As you proceed through this module's try-its, you should copy the resulting elements, such as emails, calendar appointments, tasks, and contacts, to the **M6_module_PST_starter_Firstname_Lastname** folder by using the following instructions:

1. After you attach the .pst file, you should be able to observe duplicate folders for items such as emails, calendar appointments, tasks, and contacts.

2. After you complete a try-it exercise, select your resulting items in the navigation pane. Make sure you select the items that are associated with your email account.

3. In the details pane, right-click or access the context menu for each item, and then select **Copy** or select Ctrl+C.

4. Select the **M6_module_PST_starter_Firstname_Lastname** folder.

5. Select Ctrl+V to copy the item to the .pst file.

6. Repeat steps 3 through 5 for any additional items that you want to copy.

Topic 1: Create and update a contact

To work efficiently in Outlook, you need to know how to create contacts and add relevant data to them. It's also important to know how to make changes to contacts. In this topic, you'll learn how to create, update, observe, and search for contacts.

What is a contact?

A *contact* is an Outlook item that stores information about a person with whom you communicate, as depicted in the following screenshot.
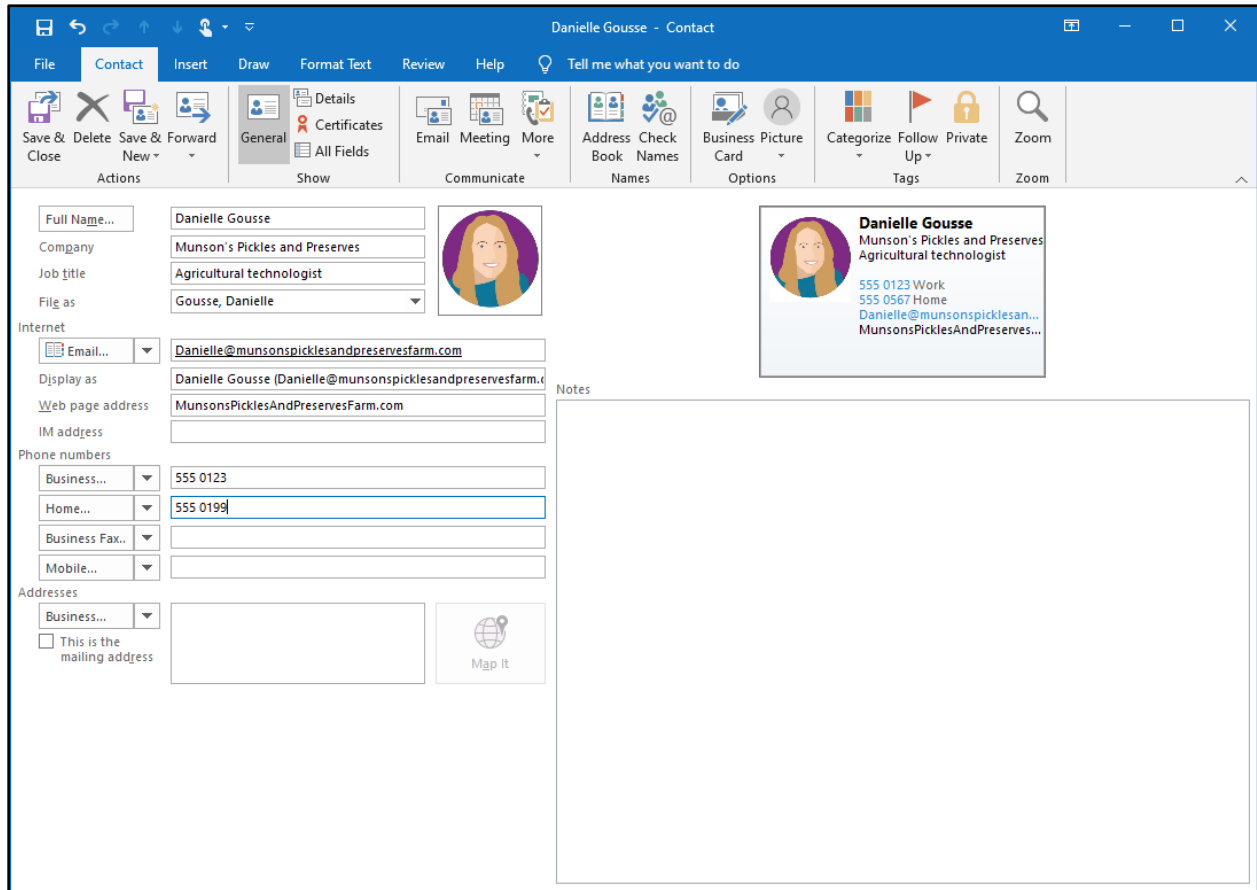
Figure 1: A contact in Outlook

You can create a contact by only specifying a person's name, but you'll typically want to provide more information about them. The following table defines the general configurable options for contacts in Outlook.

Full Name	The person's full name, usually derived from their first and last names in most address lists. However, you can edit this option to suit your requirements.
Company	The assumption for most contacts is that they are work colleagues, and therefore, it's helpful to know which company they work for. This is not a mandatory field, so if the contact is personal, you don't have to enter the company information.

Job title	Similar to **Company**, the job title is relevant if the contact is someone you know through work.
File as	This field is important because it defines how your contact will display in a list of contacts. The default behavior is to sort contacts by last name and then first name. However, you can select to sort by first name and then last name. You can also choose to file the contact by company, by full name and company, or even by company and full name. This field is automatically generated, but you can change it to suit your needs. Also note that some apps on phones and tablets use their own mechanism for sorting and displaying contacts. This option defines the sorting characteristics for Outlook only.
Email	In most situations, you will define an email address for a contact. Outlook lets you define multiple email addresses, to which you can ascribe a **Display as** property. For example, if a contact has two email addresses, one for personal use and one for work, assign the **Display as** label as **Personal** and **Work** (in addition to their name).
Web page address	Many contacts might not have a website address, but for those that do, this field can be a timesaver when you're trying to locate their website.
Phone numbers	By default, four number fields display: **Business**, **Home**, **Business Fax**, and **Mobile**. However, you can change the text label for these fields, and choose from **Assistant**, **Business**, **Business 2**, **Car**, **Company**, **Other**, **Pager**, and many others.
Addresses	You can assign three postal addresses: **Business**, **Home**, and **Other**. You can assign one of the defined addresses as the mailing address for the contact. If you're connected to the internet, you can map the address, so its location displays within the contact.

Microsoft

Picture	You can browse and select a picture for your contact. Note that if your contacts are generated from your phone contact list and you assign a picture to them, the contact details should synchronize with the picture for the contact into Outlook.
Notes	This is a text box where you can add additional details about the contact.

Table 2: General contact options

In addition to these fundamental contact elements, you can also configure additional details by selecting **Details** on the **Show** group on the **Contact** tab, as depicted in the following screenshot.

Figure 2: Additional contact details

The following table describes some of the advanced contact details and elements.

Department / Office / Profession	If the contact represents a work contact, then you can use the **Department**, **Office**, and **Profession** fields to define additional information about the contact's place of work.
Nickname	Use this box to provide information about a contact's nickname. For example, in the screenshot, the contact Danielle might be addressed as Dani in informal situations. This field can be useful in helping you get that right.
Title	If necessary, provide the contact's preferred title, such as Dr., Prof., Mr., or Ms. You can also enter text into this field if the preferred title is not listed.
Suffix	You typically use this option for contacts that have Junior or Senior as a suffix. However, you can also add your own text here as well.
Manager's name / Assistant's name	These options are most useful for business colleagues. You can use them to define business relationships between contacts.
Spouse / Partner	Knowing the names of your contacts' partners or spouses can be really helpful, especially if you've already defined the partner or spouse as a separate contact.
Birthday / Anniversary	You can use this option to add information about special events and receive a useful reminder on those days.

Table 3: Advanced contact elements

Microsoft

You can also select **All Fields** in the **Show** group to view and modify all configurable options for a contact. As the following screenshot depicts, you can select between **User-defined fields in this item**, **Frequently-used fields**, **Address fields**, **Email fields**, and others.
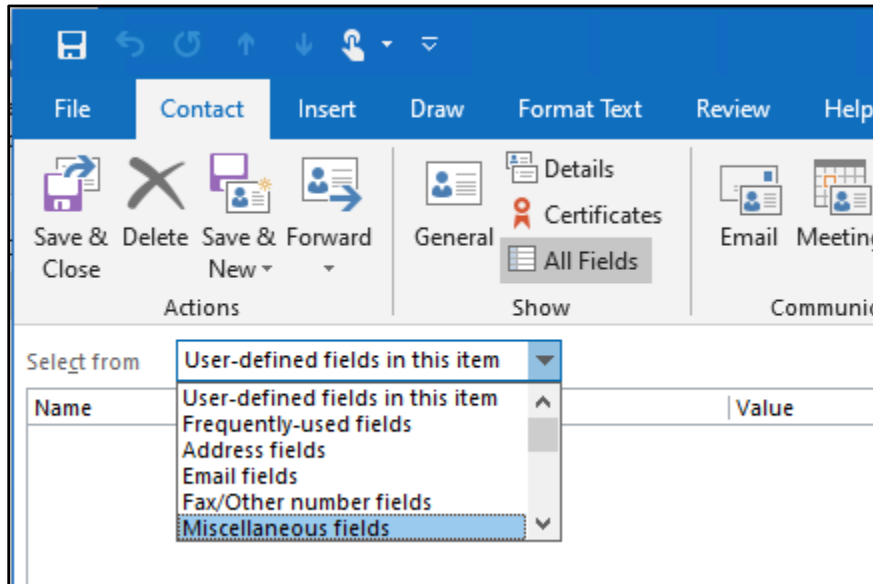
Figure 3: Viewing additional fields

What can I do with an open contact?

When you're working with a contact, the **Contact** tab on the ribbon provides a number of commands, as depicted in the following screenshot. These commands include saving and deleting, displaying additional details, selecting communication options, and tagging.
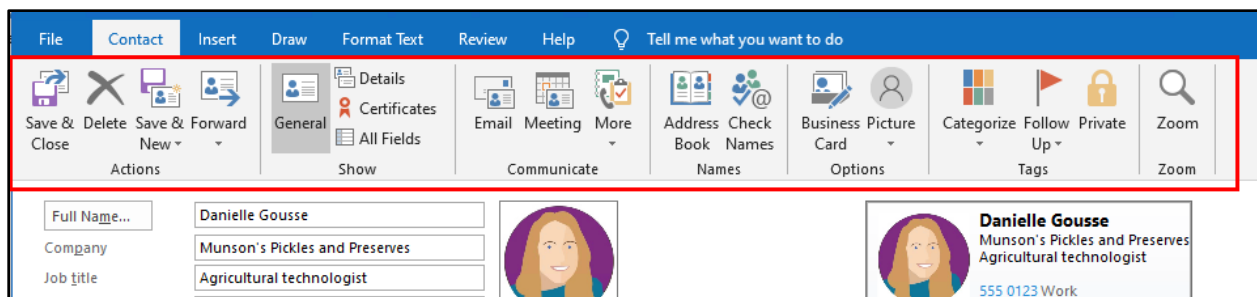
Figure 4: Contact actions via the ribbon

The following table describes each of the groups on the **Contact** tab and some of the actions you can perform from these groups.

Actions	This group contains the primary contact tools for creating and deleting contacts. It includes the **Save & Close**, **Delete**, **Save & New**, and **Forward** commands.
Show	You can use the commands in this group to observe general contact information, detailed information, all fields, and also to view digital certificates associated with the contact. **Note**: Digital certificates are used to identify a user when they communicate with you by using email. Certificates are used for message signing and sealing, which were discussed in an earlier module in this course.
Communicate	You can use the commands in this group to initiate communication with a contact. You can choose to send an email, set up a meeting, call the contact, visit their webpage, assign the contact a task, or find their address on a map. Note that these options might change when you add additional functionality to your email account. For example, Microsoft 365 users can also create online meetings, such as Microsoft Teams meetings. However, most users do this by using the calendaring feature in Outlook.
Names	You can use the commands in this group to verify that the names and email addresses you have defined for the contact are valid or correctly formatted.
Options	Commands in this group enable you to configure and review a business card for the contact, and update the contact's picture.
Tags	You can use tags from this group to assign categories, follow up, and privacy settings for the contact.
Zoom	This group contains only one command of the same name, which you can use to change the current zoom level in the selected view.

Table 4: Actions that you can perform on contacts from the ribbon

Microsoft

After you create and save a contact, Outlook displays a list of contacts in the **Contacts** window. On the **Home** tab, which is depicted in the following screenshot, you can use the commands to perform a number of tasks, such as creating, deleting, and tagging contacts, and customizing the **Current View** options for contacts.
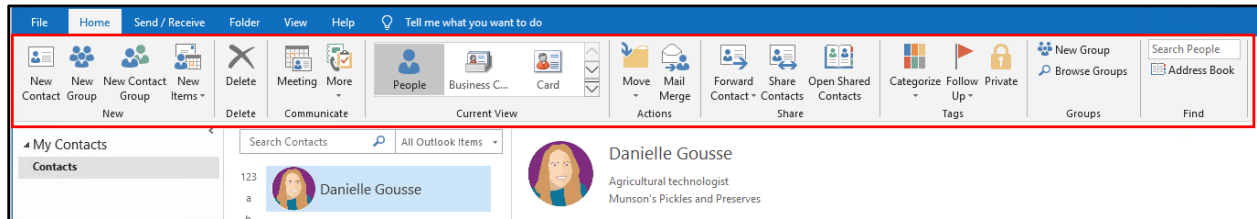
*Figure 5: Contact actions via the **Home** tab on the ribbon*

The following table describes each of the groups on the **Home** tab and some of the actions you can perform from these groups.

New	Select and create a new contact, a new group, a new contact group, and other new Outlook items.
Delete	Delete the currently selected contact (or contacts).
Communicate	Initiate communications with the contact. You can choose to send an email, set up a meeting, call the contact, visit their webpage, assign the contact a task, or find their address on a map.
Current View	Choose between the default **People** view, and **Business Card**, **Card**, **Phone**, and **List** views. You can also access options to create and configure your own custom views.
Actions	Select **Move** to relocate the contact to a different folder. You can also select **Mail Merge** to use your contacts list as the source for a mail merge activity.
Share	You can share a specific contact by forwarding it, or you can choose to share your entire contact list with colleagues. You can also view the contacts list for other users by choosing **Open Shared Contacts**. However, the other user must have granted you permissions to share their contacts list.
Tags	Use tags to assign follow up, categories, and privacy settings for the contact(s).

Microsoft

Groups	Create new email groups or manage existing groups.
Find	Locate a specific contact (or contacts) by searching by name, by address book, or by filtering email, rather than simply browsing through a list.

Table 5: Actions that you can perform on contacts from the ribbon
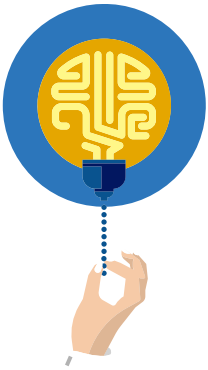
Did you know?

Although you can share your contacts with colleagues, in a workplace, typically you will have access to a list of contacts via the Global Address List (GAL) for your organization. The GAL can also be made available offline. In addition to the GAL, you or your organizational administrator can create more address lists that meet specific needs. For example, you might create an address list that contains only customers from the local area, or employees from a certain department.

Create a new contact

To create a contact:

1. Open Outlook, and then from the **Navigation Bar**, select **People**.

2. On the ribbon, select **New Contact**.

3. In the **Untitled - Contact** window, enter the following information, and then select **Save & Close**:

    o   **Full Name**

    o   **File as**

You can define additional options as required, but these are the minimum. Note that Outlook automatically generates the **File as** field when you enter the **Full Name**.

Update a contact

To update a contact:

1. Within Outlook, and from the **Navigation Bar**, select **People**.

2. In the list of contacts, double-click the contact you wish to update, or select the contact, and then select Enter. If the list is long, in the **Search Contacts** box, enter the name, or part of the name you want to locate.

3. In the opened contact, make the desired changes and then select **Save & Close**.

Search contacts

If you select the **Search** contextual tab in **Contacts** (depicted in the following screenshot) you can scope and refine your search by using the command groups that the following screenshot highlights.
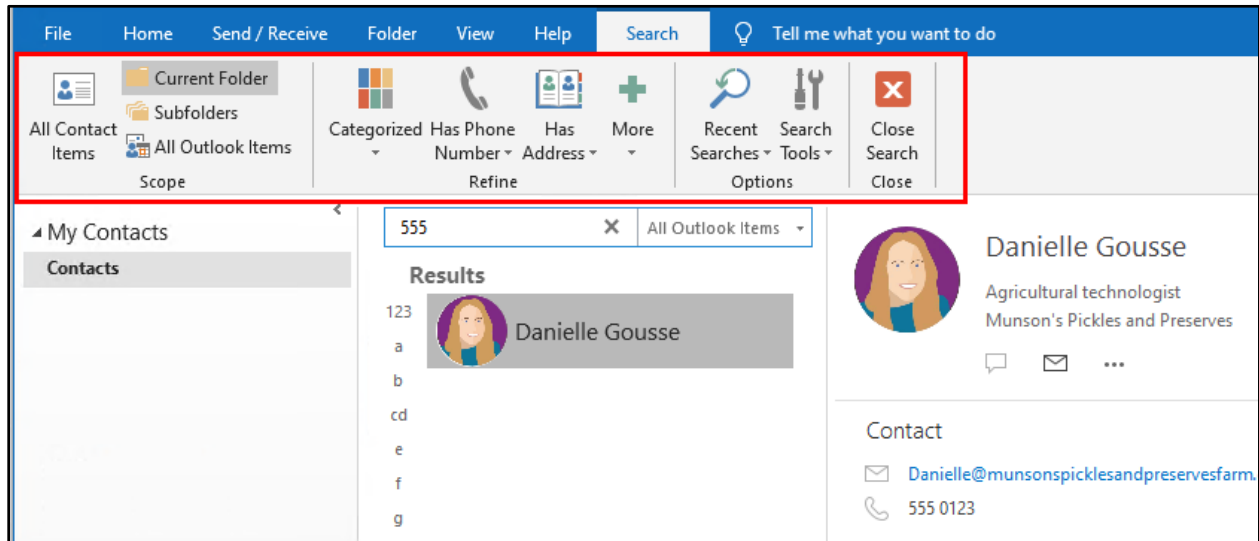
Figure 6: Contact search options

The following table describes the command groups in the **Search** contextual tab in **Contacts**.

Scope	Limit the scope of the search to **All Contact Items**, the **Current Folder**, specific **Subfolders**, or widen the search to **All Outlook Items**.
Refine	Refine the search and only return results that meet certain criteria, such as a specific category, phone number, addressing information, or other factors, including all available contact fields.
Options	Select from recent searches, or use a multitude of search tools to review and configure search options, including indexing, and locations to search.

Table 6: Search scope and refine options for contacts

Microsoft
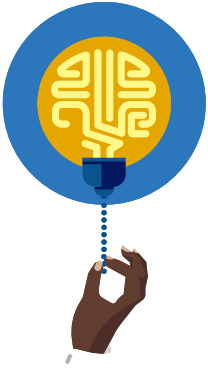
Did you know?

You aren't limited to searching only by name. You can enter any searchable element from any field into the **Search Contacts** box. For example, you can enter a partial (or complete) telephone number, or web address.

Review contacts

To review your contacts:

1. In Outlook, on the **Navigation Bar**, select **People**. The default **Contacts** view displays (which is People). You can now browse the list of contacts, or else use search to locate the contact you want to view.

2. To change the view, select from the available options in the **Current View** group of the ribbon, as highlighted in the following screenshot.
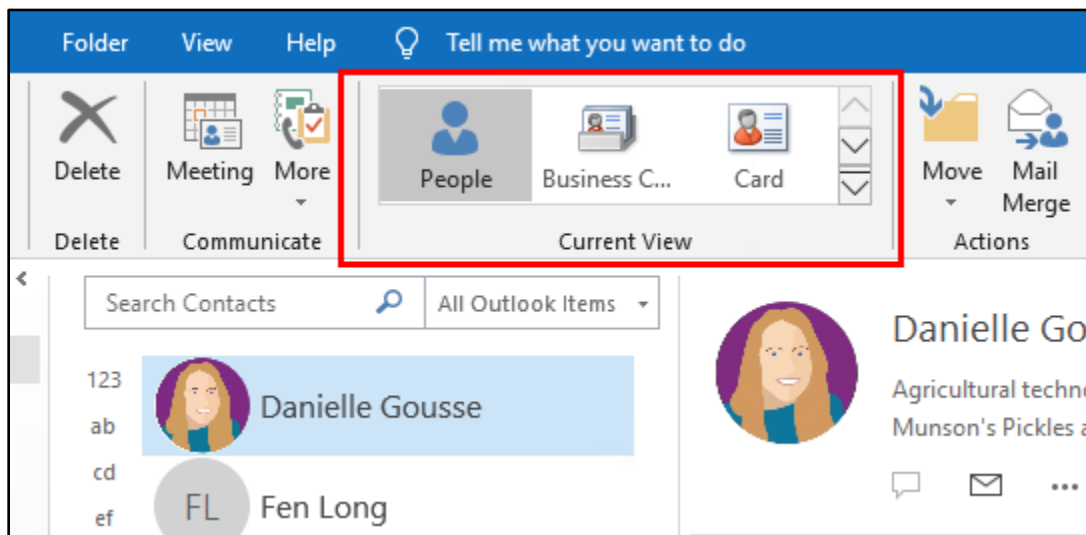
Figure 7: Changing the contacts view

3. Alternatively, select the **Change view** arrow that is adjacent to the list of views, and then select from **People**, **Business Card**, **Card**, **Phone**, and **List**. You can also select **Manage Views** to create your own view.

4. From the **Manage All Views** dialog box (depicted in the following screenshot), you can create additional views or customize existing views.
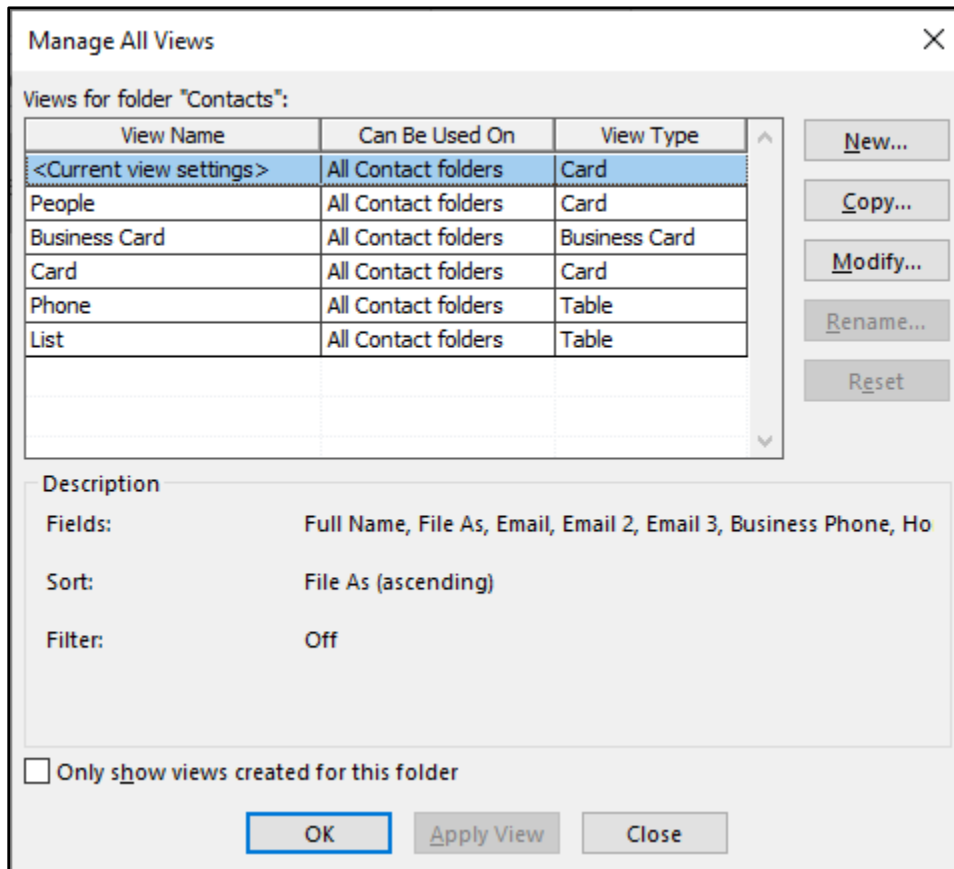
*Figure 8: Customizing views in the **Manage All Views** dialog box*

5. To create a new view, select **New**.

6. In the **Create a New view** dialog box, in the **Name of new view** box, enter a suitable name.

7. In the **Type of view** list, select the appropriate option from **Table**, **Timeline**, **Card**, **Icon**, and others, and then select **OK**.

8. In the **Advanced View Settings:** dialog box, select the appropriate columns, filters, and sort options, and then select **OK** twice.

You are now ready to assign the view to your contacts from the **Current View** list.

Activity: Pose a challenge

In this activity, you'll create a new contact. Your teacher will guide the class through this activity.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Open Outlook.

2. From the **Navigation Bar**, select **People**.

3. From the ribbon, select **New Contact**, or select Ctrl+N.

4. In the **Untitled - Contact** window, enter the information provided by your teacher, and then select **Save & Close**.

Try-it: Create and update a contact

In this leveled try-it activity, you'll create and update contacts.

Try-it 1

In this try-it, you'll create a contact from the ribbon.

Resources

- None

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. If necessary, open Outlook 2019, and then select **People**.

2. From the ribbon, select **New Contact**.

3. Create a new contact with the following properties:

   - Full Name: **Danielle Gousse**
   - Company: **Munson's Pickles and Preserves**
   - Job title: **Agricultural technologist**
   - File as: **Gousse, Danielle**
   - Email: **Danielle@munsonspicklesandpreservesfarm.com**
   - Business phone number: **555 0123**
   - If available on your computer, add the appropriate image for this contact.

Try-it 2

In this try-it, you'll create a contact by using a keyboard shortcut.

Resources

- None

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. In Outlook 2019, in **People**, select Ctrl+N.

2. Create a new contact with the following properties:

   o Full Name: **Fen Long**

   o Company: **Munson's Pickles and Preserves**

   o Job title: **Irrigation engineer**

   o File as: **Long, Fen**

   o Email: **Fen@munsonspicklesandpreservesfarm.com**

   o Business phone number: **555 0123**

   o If available on your computer, add the appropriate image for this contact.

Try-it 3

In this try-it, you'll modify the properties of a contact.

Resources

- None

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Open the **Fen Long** contact.

2. Add the following website address: **MunsonsPicklesAndPreservesFarm.com**

3. Save the contact.

4. Open the **Danielle Gousse** contact.

5. Add the following website address: **MunsonsPicklesAndPreservesFarm.com**

6. Save the contact.

Additional information

For more information on adding contacts, go to: [Add a contact](#)

Topic 2: Add a contact from an email message

If you find yourself regularly communicating with a person by using email, Outlook makes it easy to add that person as a contact from within an email. This topic explains how you can do this.

Add a contact from an email

To add a contact from an email:

1. Open Outlook.

2. From the **Navigation Bar**, switch to **Mail**.

3. Locate the appropriate message and open it.

4. In the email header, directly beneath the ribbon, right-click or access the context menu for the email originator (that's the person the email came from), and then select **Add to Outlook Contacts**, as the following screenshot depicts.

Microsoft
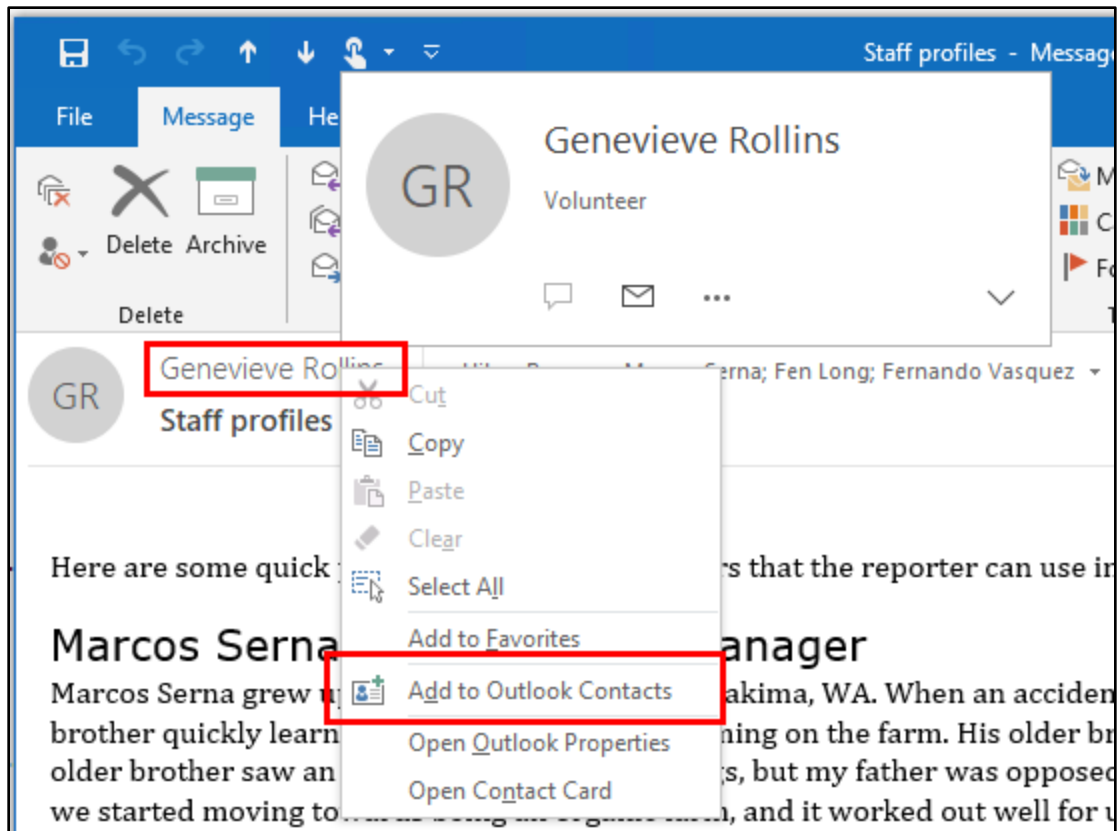
Figure 9: Adding a contact from the originator of an email message

5. A new contact dialog box opens with the appropriate details already populated, such as **Email**, **Full Name**, and **File As**. Note that other details might be available depending on where the user's email account resides and the level of access you have to that account. For example, if the user exists within your Microsoft 365 Exchange Online environment, your contact will populate with many more additional details.

6. Select **Save & Close**.
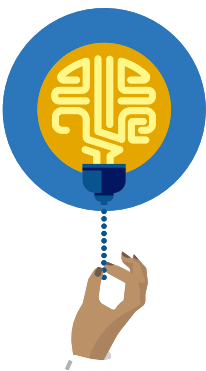
Did you know?

You can also add as a contact any of the recipients on the **To** or **CC** lines in the email, as depicted in the following screenshot.
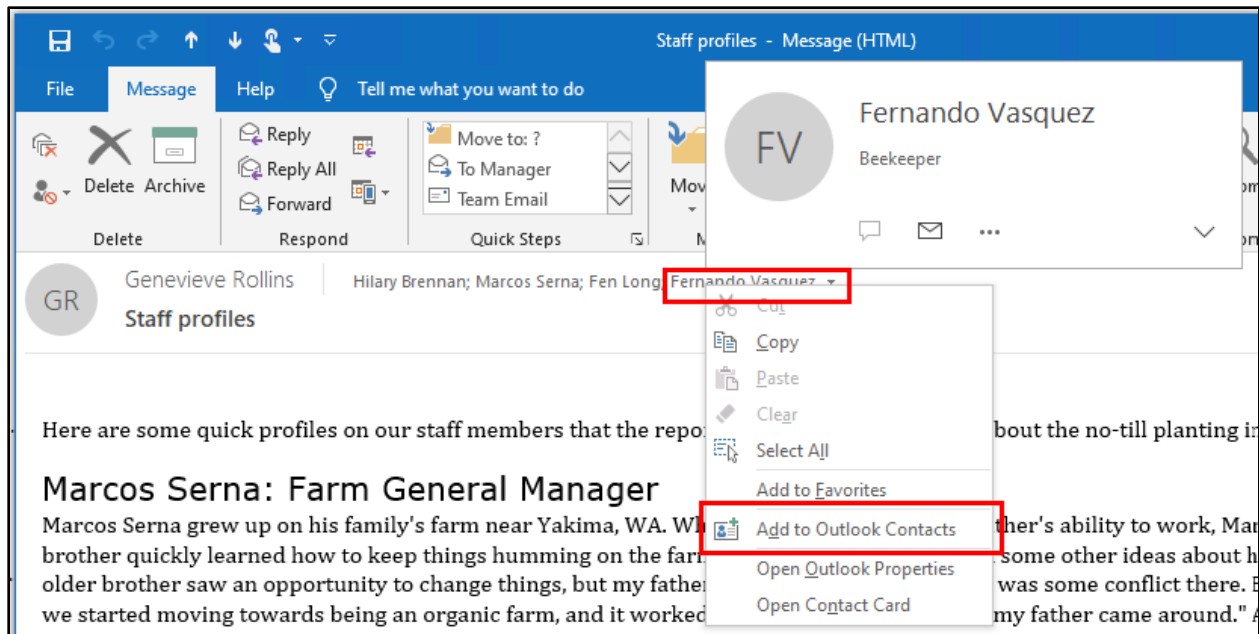
*Figure 10: Adding a contact from the **To** list in an email*

Activity: Show and tell

In this activity, your teacher will demonstrate how to add a contact from an email. Follow along and ask any questions you might have.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Open Outlook.

2. From the **Navigation Bar**, switch to **Mail**.

3. Locate a message and open it.

4. In the email header, directly beneath the ribbon, right-click or access the context menu for the email originator, and then select **Add to Outlook Contacts**.

5. A new contact dialog box opens with the appropriate details completed, such as **Email**, **Full Name**, and **File As**. Add any additional details and then select **Save & Close**.

Microsoft

Try-it: Add a contact from an email message

In this leveled try-it activity, you'll add contacts from received email headers.

Try-it 1

In this try-it, you'll add a contact by using a message originator in an email.

Resources

- The message with the subject line **Staff profiles**

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. In Outlook 2019, switch to **Mail**.

2. Locate and open the **Staff profiles** email, which is in the **Inbox** folder of the **M6_module_PST_starter_Firstname_Lastname** .pst file you attached earlier.

3. Right-click or access the context menu for the message originator, **Genevieve Rollins**, and then select **Add to Outlook Contacts**.

4. Save the contact.

Try-it 2

In this try-it, you'll add additional details to a contact from an email.

Resources

- The message with the subject line **Staff profiles**

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. In Outlook 2019, switch to **Mail**.

2. Locate and open the **Staff profiles** email, which is in the **Inbox** folder of the **M6_module_PST_starter_Firstname_Lastname** .pst file you attached earlier.

3. Right-click or access the context menu for email recipient **Hilary Brennan**, and then select **Add to Outlook Contacts**.

4. In the **Hilary Brennan - Contact** dialog box, in the **Company** field, enter **Munson's Pickles and Preserves**.

5. In the **File as** list, select **Hilary Brennan**.

Microsoft

6. In the **Email** list, change the email address to **Hilary@Munsonspicklesandpreservesfarm.com**.

7. Save the contact.

8. Close the email message, and then and switch to **People**.

9. Open **Genevieve Rollins**.

10. In the **Genevieve Rollins - Contact** window, in the **Company** field, enter **Munson's Pickles and Preserves**.

11. In the **File as** list, select **Genevieve Rollins**.

12. In the **Email** list, change the email address to **Genevieve@Munsonspicklesandpreservesfarm.com**.

13. If available on your computer, add the users' pictures to their contact profiles.

14. Save the contact.

Topic 3: Import contacts from external sources

You've probably had to copy contacts from an old phone to a new one at some point. It's also possible that you have a list of contacts in another email system or stored in an external file of some sort that you might want to access through Outlook. In this topic, you'll learn how to do that.

Outlook supports a number of import locations for contacts. These include:

- .pst files
- vCARD files
- Comma-separated value (CSV) files

Import a .pst file

As part of the setup for this module, you already know how to import a .pst file. The following steps are a reminder of the process:

1. Open Outlook.

2. Select the **File** tab, and then select **Open & Export**.

3. In the **Open** pane, select **Open Outlook Data File**.

4. In the **Open Outlook Data File** dialog box, use the navigation pane to locate and select the .pst file that contains the contacts you want to import. **Note**: A new folder is now available in the navigation pane. This folder contains the required contacts.

Import a vCARD file

vCARD files have a .vcf file extension. Many software companies use vCARD files to store contact information. This wide usage means that they're ideal for moving contacts between different email systems. If you receive a vCARD file, the easiest way to import in into Outlook is to double-click the file or select it, and then select Enter. Outlook will open the contact in a new window, and you will have the option to save the contact.

Another way to import a vCARD is to use the **Import and Export Wizard**. To access the wizard:

1. Open Outlook.

2. Select the **File** tab, and then select **Open & Export**.

3. In the **Open** pane, select **Import/Export**.

4. In the **Import and Export Wizard** (depicted in the following screenshot), select **Import a vCARD file (.vcf)**, and then select **Next**.
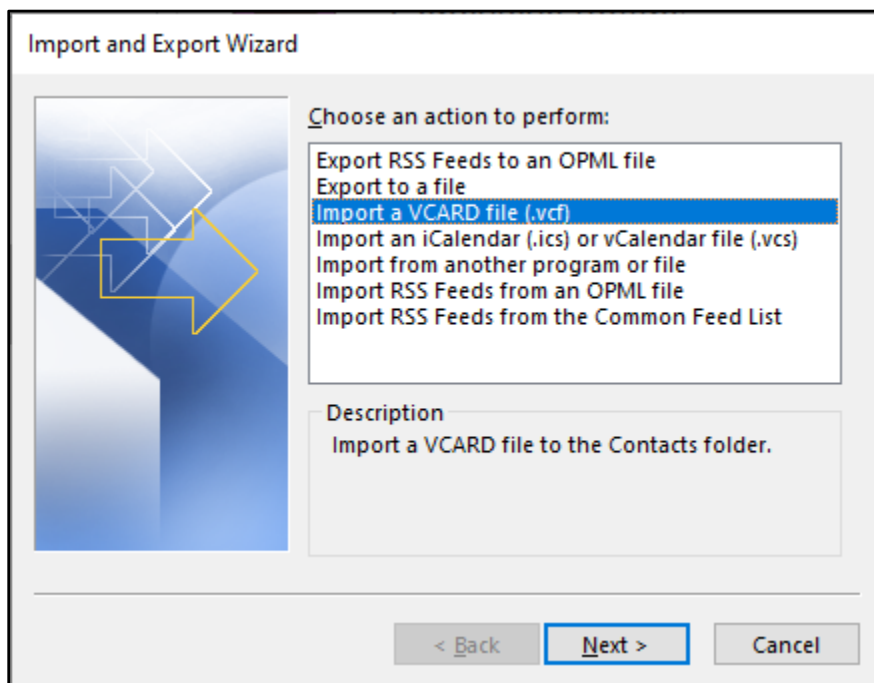
*Figure 11: Using the **Import and Export Wizard** to import a contact from a vCARD*

5. In the **vCARD File** dialog box, browse and locate the vCARD file and then select **Open**. The contact is imported and saved automatically in your contact list.

Import a CSV file

Another commonly used file format is CSV. As depicted in the following screenshot, the file stores the contact information in fields separated by a comma.
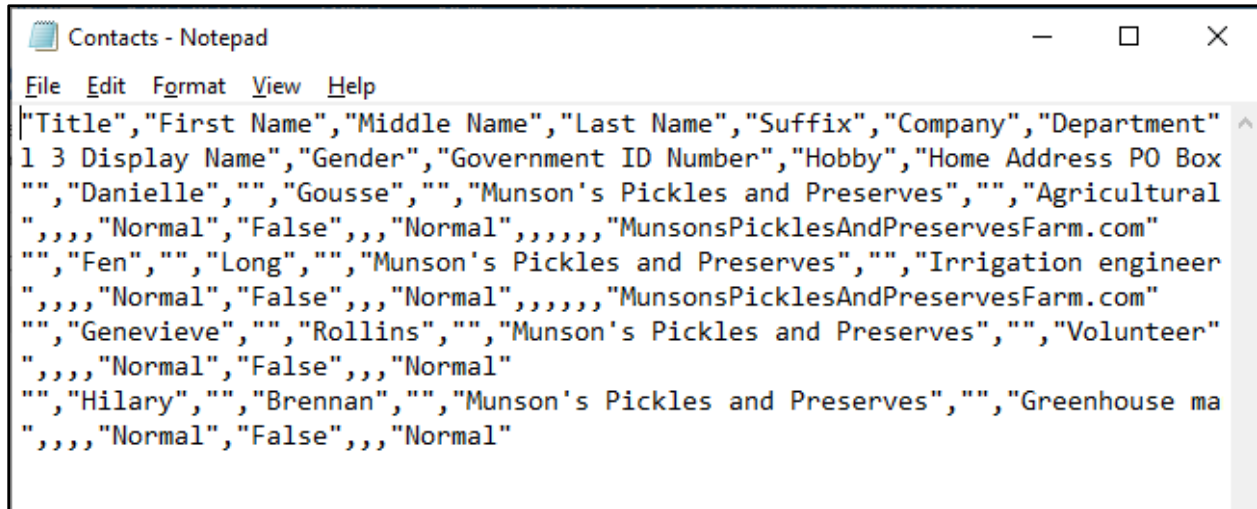
Figure 12: A CSV file

To import a CSV file:

1. Open Outlook.

2. Select the **File** tab, and then select **Open & Export**.

3. In the **Open** pane, select **Import/Export**.

4. In the **Import and Export Wizard**, select **Import from another program or file**, and then select **Next**.

5. In the **Import a File** dialog box, select **Command Separated Values**, and then select **Next**, as depicted in the following screenshot.
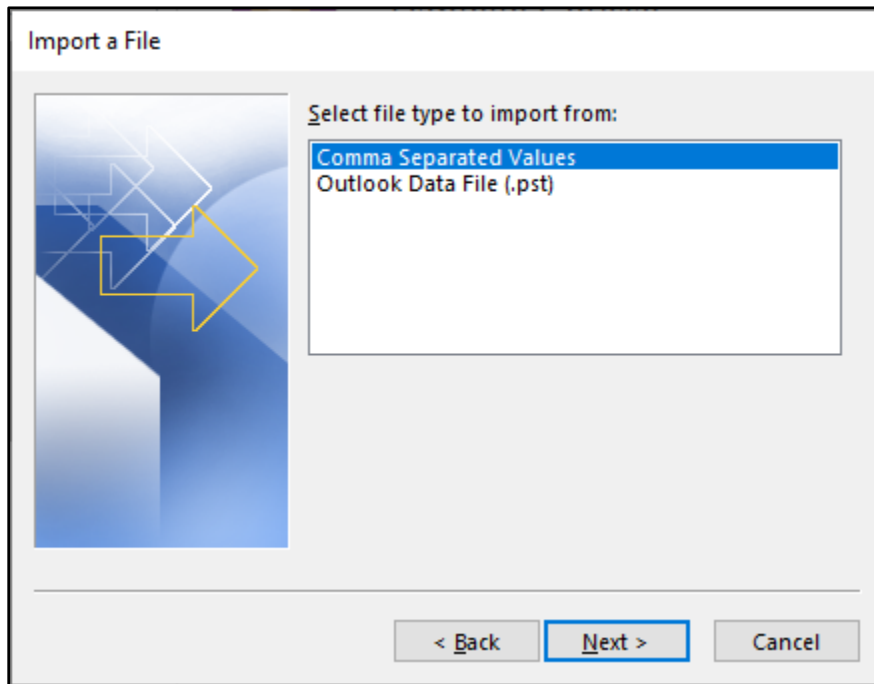
Figure 13: Importing a CSV file

6. In the **Import and File** dialog box, next to the **File to import** text box, select **Browse**.

7. Locate your CSV file, and either double-click it or select it, and then select Enter.

8. Under **Options**, as depicted in the following screenshot, select either **Replace duplicates with items imported**, **Allow duplicates to be created**, or **Do not import duplicate items**, and then select **Next**.
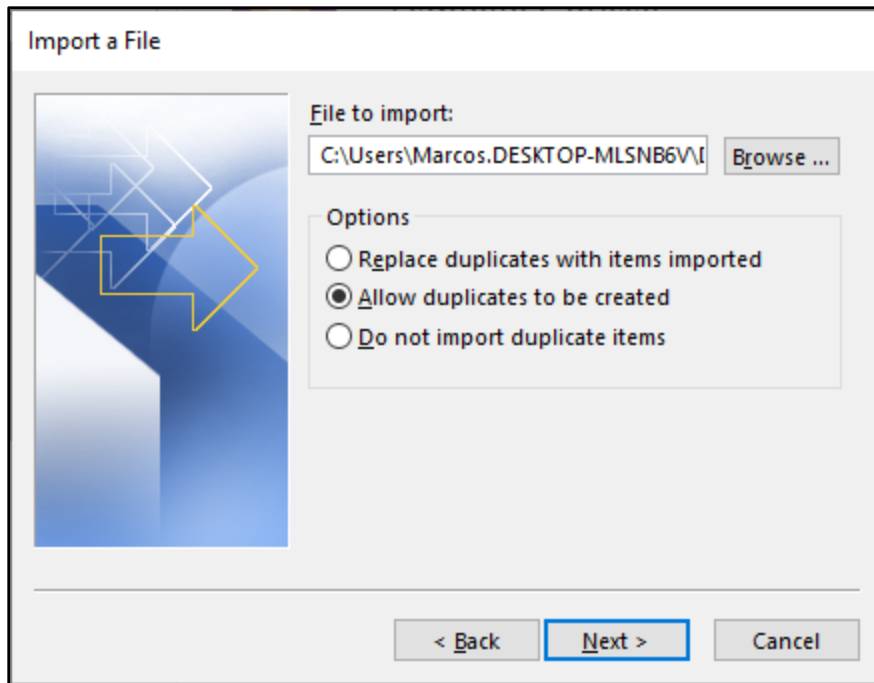
Figure 14: Defining what to do with duplicate entries

9. In the next **Import a File** dialog box, select the destination location, and the select **Next**. (The default location, **Contacts**, is usually appropriate.)

10. Finally, on the summary page, select **Finish**.
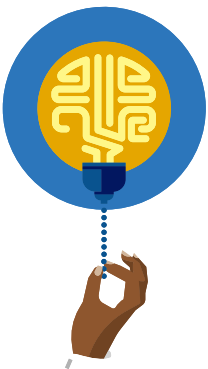
Did you know?

When you import more complex lists from a CSV file, you can perform custom mapping for specific fields. This means that certain fields in the CSV file will map to specific elements in your contacts in Outlook.

Activity: Show me how

In this activity, your teacher will display a short video on how to import contacts from a Microsoft Excel spreadsheet.
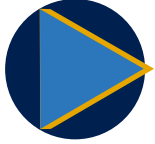
Video

To review the video about importing contacts from an Excel spreadsheet, go to: <u>Import contacts</u>

Resources required

You will need the following resources for this activity:

* None

Activity instructions

Review the video with your class. If you have any questions, ask your teacher.

Try-it: Import contacts from external sources

In this standalone try-it activity, you'll export your contacts to a CSV file, and then import them back in.

Resources

* None

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. In Outlook 2019, switch to **People**.

2. Select the **File** tab, and then select **Open & Export**.

3. In the **Open** pane, select **Import/Export**.

4. In the **Import and Export Wizard**, select **Export to a file**, and then select **Next**.

5. Select **Comma Separated Values**, and then select **Next**.

6. In the **Export to a File** dialog box, make sure **Contacts** is selected, and then select **Next**.

7. Select **Browse**, and then in the **Browse** dialog box, in the navigation pane, select **Desktop**.

Microsoft

8. Make sure the **File name** box displays **Contacts**, and then select **OK**.

9. Select **Next**, and then select **Finish**.

10. Browse to the **Desktop** on your computer and verify the presence of the file.

11. In Outlook, select the **File** tab, and then select **Open & Export**.

12. In the **Open** pane, select **Import/Export**.

13. In the **Import and Export Wizard**, select **Import from another program or file**, and then select **Next**.

14. In the **Import a File** dialog box, select **Command Separated Values**, and then select **Next**.

15. In the **Import a File** dialog box, next to the **File to import** text box, browse and open your **Contacts** CSV file (on the desktop).

16. Ensure you select **Allow duplicates to be created**.

17. In the next **Import a File** dialog box, select the destination location (use the default, **Contacts**), and then select **Next**.

18. Finally, on the summary page, select **Finish**. You should be able to observe duplicates of your original contacts because you selected to allow duplicates.

19. Delete the newly created duplicates.

Additional information

For more information on importing contacts, go to: [Import contacts to Outlook](#)

Wrap-up

Use these questions to check what you learned in this lesson:

1. A contact must have a **File as** property defined.

   Select the correct option.

   a. True

   b. False

2. In the **Communicate** group for a contact, what communication methods are available?

   Select all that apply.

   a. Fax

   b. Email

   c. Call

   d. Visit

3. You are performing a search for a contact. You have far too many records returned and need to limit the returned results. Which of the following would help you do that?

   Select the correct option.

   a. Limit the search scope

   b. Refine the search

   c. Both

   d. Neither

4. If you search for a contact based on its category, you are _____ your search results.

   Fill in the blank space.

5. You can use the _____ view to display the picture, full name, job, and company details of a contact.

   Fill in the blank space.

6. To add a contact from an email message, right-click or access the context menu for the appropriate person in the email header, and then select _____.

   Fill in the blank space.

Lesson 2: Using contact groups

Overview

If you are managing a number of contacts that are related, it can be useful to group them together. Perhaps your contacts are working on the same project with you, or they work at the same company as you. Grouping makes it easier to email the contacts because you don't need to specify each recipient individually. In this lesson, you'll learn how to create and manage Outlook contact groups.

Warm-up

In preparation for this lesson, answer the following questions to check what you might already know about using contact groups in Outlook.

1. Which of the following statements is correct about an Outlook contact group?

    Select the correct option.

    a. It provides a place for shared email, files, and shared calendar.

    b. It's a collection of contacts, similar to an email distribution list.

    c. Both a and b

    d. None of the above

2. You can assign tags to contact groups.

    Select the correct option.

    a. True

    b. False

3. In addition to a membership list, you must also define the _____ of the contact group.

    Fill in the blank space.

4. A contact group can contain members from your Outlook **Contacts**, an address list, or a new contact with an _____.

    Fill in the blank space.

Topic 1: Create a contact group

📍 You create Outlook contact groups from the **People** workspace in Outlook. In this topic, you will learn how to create a contact group and practice your skills in the try-it activity.

How to create a contact group

To create a contact group:

1. Open Outlook, and then select **People**.

2. On the **Home** tab, in the **New** group, select **New Contact Group**, as depicted in the following screenshot.
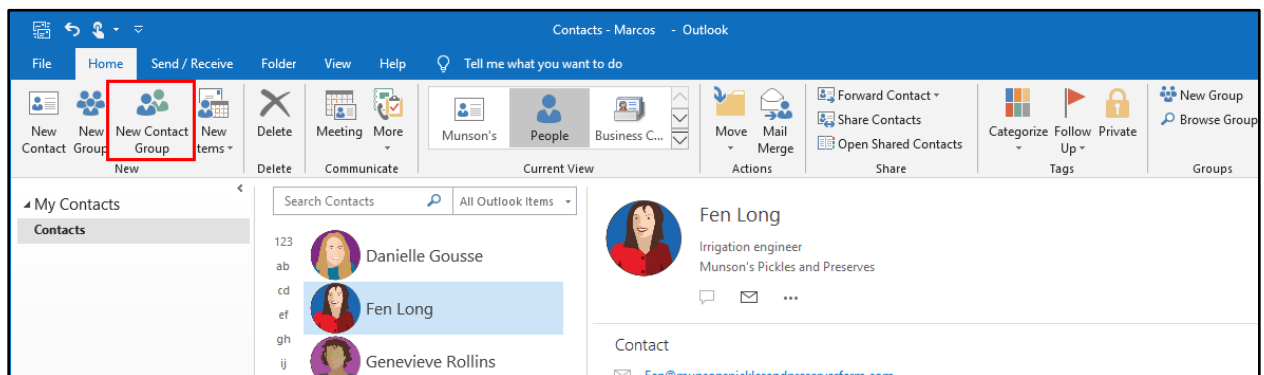
Figure 15: Creating a new contact group

3. In the **Untitled - Contact Group** window, in the **Name** text box, enter a meaningful name, as depicted in the following screenshot.
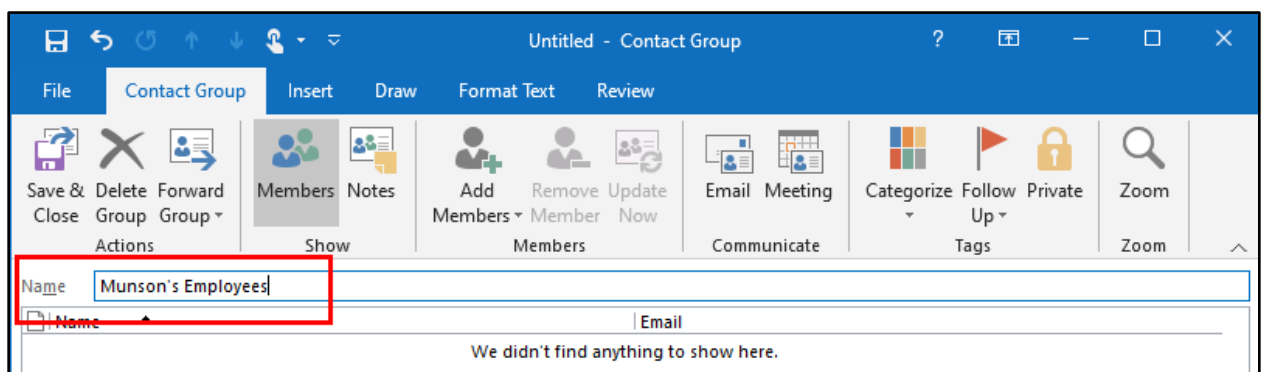
Figure 16: Defining the group's name

Microsoft

4. To add members, on the **Contact Group** tab, in the **Members** group, select **Add Members**, and then, as depicted in the following screenshot, select the location of the members' contact information.
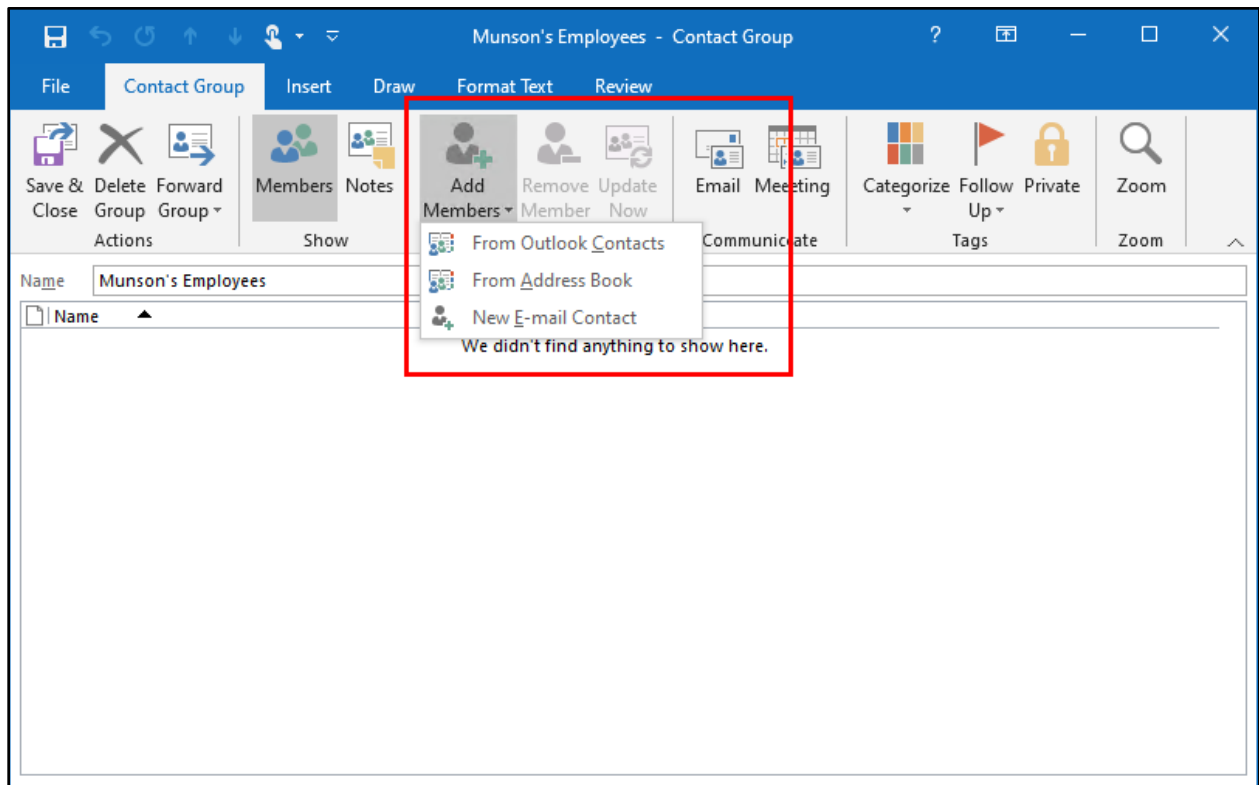
Figure 17: Selecting the location of the members' contact information

5. You can add members from existing contacts, or from an address list such as a Global Address List (GAL) from Microsoft Exchange Server or Exchange Online.

You can also add new contacts to the group:

1. On the **Contact Group** tab, in the **Members** group, select **From Outlook Contacts**.

2. In the **Select Members: Contacts** dialog box (depicted in the following screen shot), select one or more contacts, select **Members**, and then select **OK**.

Microsoft
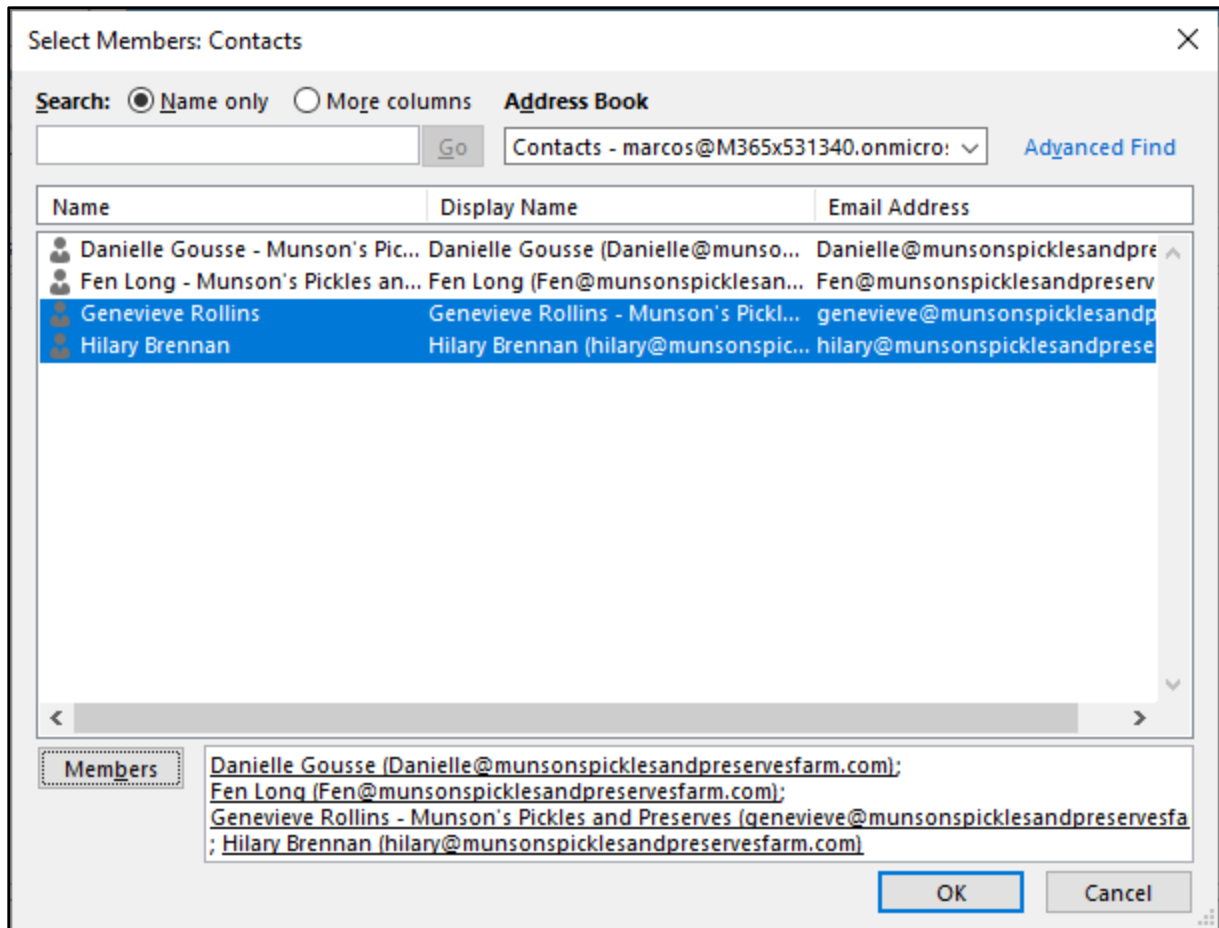
Figure 18: Adding members

3. Select **Save & Close**. Your contact group will now display in your contacts list.

After you have created your contact group, you can make changes to it by adding or removing members (which the next topic explains). You can also email the group, set up a meeting with group members, or forward the group for someone else to use.

Activity: Show and tell

The teacher will guide the class through this activity by demonstrating how to create a contact group. Follow along and ask any questions you have.

Resources required

You will need the following resources for this activity:

*   None

Microsoft

Activity instructions

Participate in the activity by following these instructions:

1. Open Outlook and select **People**.

2. On the ribbon, select **New Contact Group**.

3. In the **Untitled - Contact Group** dialog box, in the **Name** text box, enter the text **Munson's Employees**.

4. Select **Add Members** on the ribbon, and then select **From Outlook Contacts**.

5. In the **Select Members: Contacts** dialog box, select all listed contacts, select **Members**, and then select **OK**.

6. Select **Save & Close**.

Try-it: Create a contact group

In this try-it activity, you'll create a new contact group called **CSA Program Volunteers**.

Resources

- None

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. In Outlook 2019, switch to **People**.

2. On the ribbon, select **New Contact Group**.

3. Enter the name **CSA Program Volunteers**.

4. Select the **Add Members** button on the ribbon, and then select **From Outlook Contacts**.

5. In the **Select Members: Contacts** dialog box, select all listed contacts. Select **Members**, select **OK**, and then save the group.

> **Additional information**
>
> For more information on creating Contact Groups, go to: [Create a contact group or distribution list in Outlook for PC](#)

Topic 2: Update contacts within contact groups

On occasion you might need to change the membership of your contact groups. For example, you might need to add or remove contacts within a group. This topic explains the available options for updating contact groups.

Add new contacts to a group

To add contacts to an existing group:

1. Open Outlook and switch to **People**.

2. Locate your contact group and double-click it, or select it, and then select Enter.

3. To add members, select **Add Members** on the ribbon, and then choose the location of your contacts. For example, select **From Address Book**.

4. Select the contacts that you want to add, and for each, select **Members**.

5. When you complete the changes, select **OK**.

6. In the open **Contact Group** dialog box, select **Save & Close**.
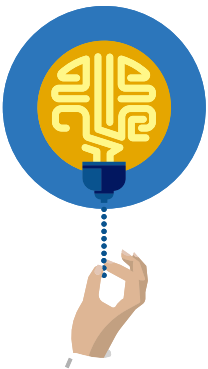
Did you know?

You can add a member to a contact group even though they're not currently a contact and don't appear in your address list. To do this, all you need is the contact's email address. To add them as a member, use the previous procedure, and then when prompted for the contact source select **New E-mail Contact**. You can then specify the contact's **Display name** or **E-mail address**, and add them to the group.

Remove contacts from a group

To remove contacts from a contacts group:

1. Open Outlook and switch to **People**.

2. Locate your contact group and double-click it, or select it, and then select Enter.

3. To remove members, select the appropriate member, and then on the ribbon, select **Remove Member**.

4. When you have removed all the contacts that you want, select **Save & Close**.

Activity: Pose a challenge

In this activity, your teacher will pose a challenge to the class. You or one of your classmates will take up this challenge and demonstrate how to create a contact, add it to a group, and then remove it from that group.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Open Outlook and switch to **People**.

2. Locate the **Munson's Employees** contact group.

3. Create a contact for a user named **Alex Nino** who works at **Best For You Organics Company**. His email address is **Alex@bestforyouorganics.com**.

4. With guidance from the teacher and your colleagues, add this new contact to the group.

5. Remove the new contact from the group.

6. Add a user named **Danielle** to the group. Use the email address of **danielle@ bestforyouorganics.com**.

7. Remove the new contact from the group.

Try-it: Update contacts within contact groups

In this standalone try-it activity, you'll modify contact group membership by adding and removing contacts from your contact group.

Resources

- None

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Create a new contact with the following properties:

    o Full Name: **Alex Nino**

    o Company: **Best For You Organics Company**

    o Email address: **Alex@bestforyouorganics.com**

    o Job title: **Manager**

    o File as: **Alex Nino**

2. In the contacts list, double-click the **CSA Program Volunteers** contact group.

3. Add the newly created contact, **Alex Nino**, to the group.

4. Remove **Fen Long** from the group.

5. Save the changes.

Additional information

For more information on adding contacts to groups, go to: Add people to a contact group in Outlook for PC

Topic 3: Delete a contact group

After you complete a project, you might want to delete the contacts and contact groups associated with it. Likewise, when people leave an organization or move between teams at that organization, you might need to delete project groups. This topic explains how to do this.

Delete a contact group

To delete contact groups:

1. Open Outlook, and then select **People**.

2. Locate the contact group that you want to delete and select it.

3. On the ribbon, select **Delete**.

Activity: Tell a story

In this activity, your teacher will present a story about a defunct committee. You need to delete the contact group for this committee. Follow along and ask questions as your teacher demonstrates the steps.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Open Outlook.

2. Select **People**, and then select the **Munson's Employees** group.

3. On the ribbon, select **Delete**.

Try-it: Delete a contact group

In this try-it activity, you'll delete a contact group.

Resources

- None

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. If necessary, open Outlook.

2. Select **People**.

3. In the **Contacts** list, select the **CSA Program Volunteers** contact group.

4. On the ribbon, select **Delete**.

Microsoft

Wrap-up

Use these questions to check what you learned in this lesson:

1. Which view displays only a contact's full name and their image?

   Select the correct option.

   a. **Card**

   b. **Business Card**

   c. **People**

   d. **List**

2. You can add users from an address list to a contact group.

   Select the correct option.

   a. True

   b. False

3. After creating a contact group, you can email the group or set up a _____ with the group members.

   Fill in the blank space.

4. To remove a contact group, from **People**, on the ribbon, select _____.

   Fill in the blank space.

Lesson 3: Sharing contacts

Overview

You've now learned how to create and update contacts. However, Outlook also enables you to share your contacts. You can build your network and greatly improve communication by sharing contacts with others. In this lesson, you'll learn how to share contacts, create new contact folders, forward contacts, and print contact information.

Warm-up

Answer the following questions to determine what you already know about sharing contacts.

1. How can you share contacts?

    Select all that apply.

    a. By sharing a folder of contacts

    b. By emailing a colleague with an attached contact

    c. By sharing an individual contact

    d. By configuring a category of **Shared Contacts**

2. What is the default view in Outlook **People**?

    Select the correct option.

    a. **Business Card**

    b. **People**

    c. **List**

    d. **Card**

3. After you create a folder, you must _____ your contacts into it.

    Fill in the blank space.

4. By default, shared folders have _____ permissions for your colleagues.

    Fill in the blank space.

Topic 1: Create and share a contacts folder

📍 By organizing your contacts into folders, you can manage them more easily. You can also coordinate certain tasks more easily within Outlook. For example, you might want to share a group of contacts with someone else within your organization, without necessarily sharing your entire contact list. By creating contact folders within Outlook, you can share your contact groups in a timely and efficient manner, and exert more control over which contacts you specifically want to share.

Create a contacts folder

To create a contacts folder:

1. Open Outlook and switch to **People**.

2. In the navigation pane, right-click or access the context menu for the **Contacts** folder, and then select **New Folder**, as the following screenshot depicts.
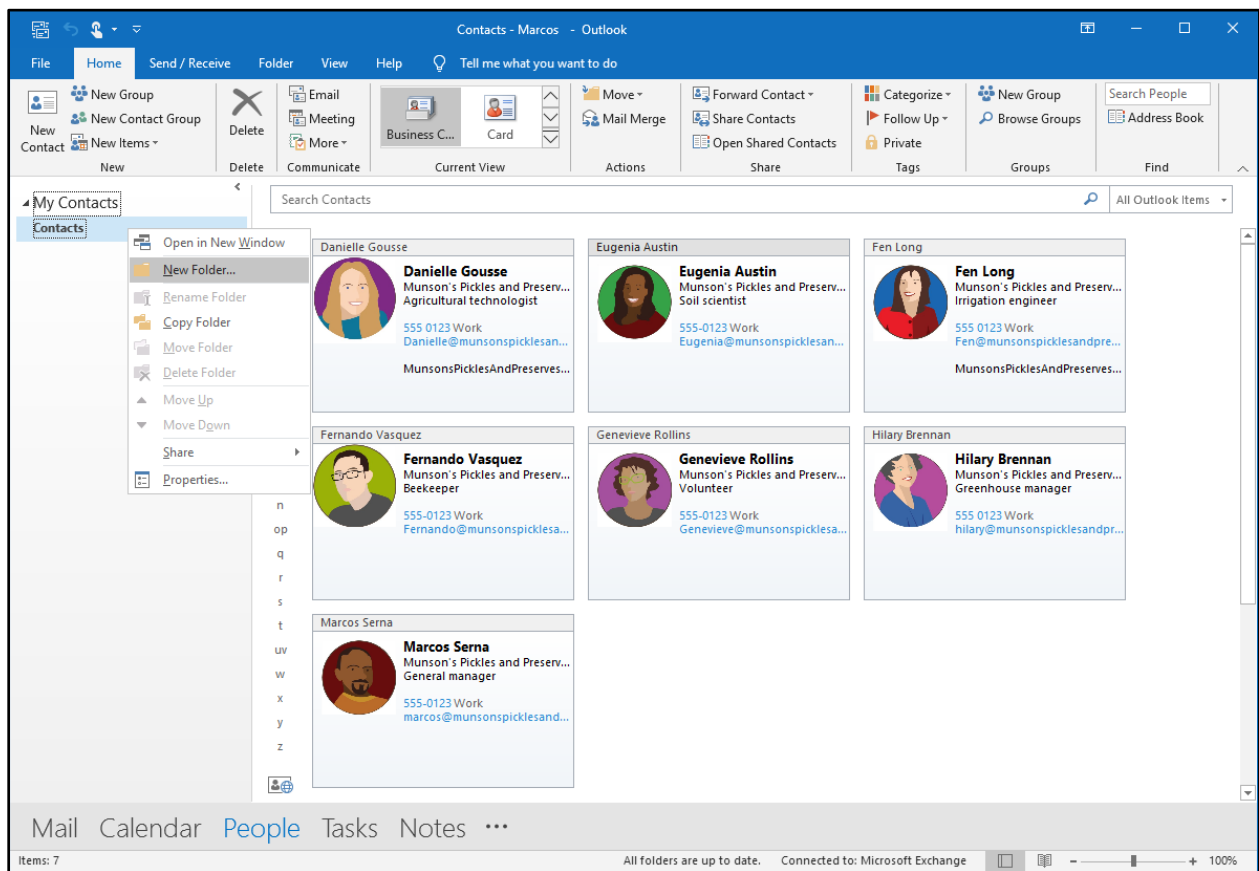
Figure 19: Creating a new contact folder

3. In the **Create New Folder** dialog box, in the **Name** box, enter a meaningful name for the contacts folder, and then select **OK**.
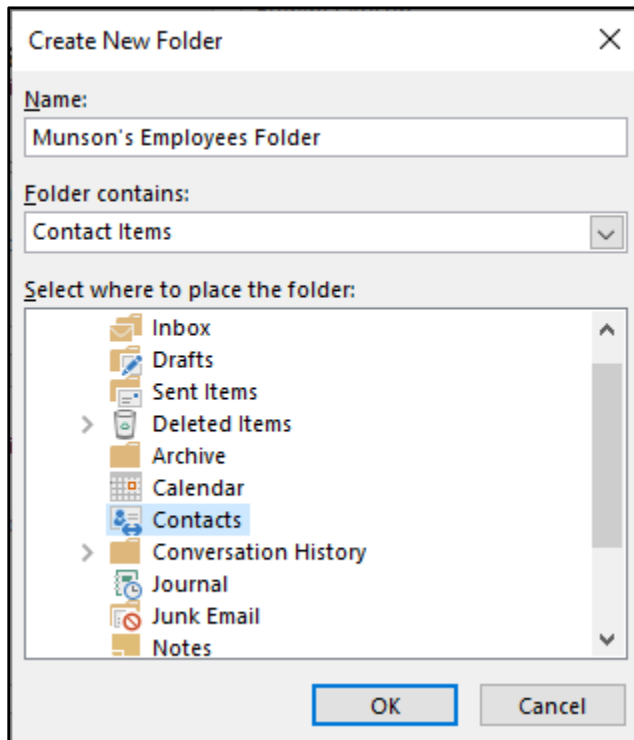
*Figure 20: **Create New Folder** dialog box*

4. Add contacts to the new contacts folder by performing one of the following procedures:

   o Select the individual contacts that you want to add to the new contacts folder and drag them into the folder.

   o Right-click or access the context menu for the contact, select **Move**, and then select **Other Folder**. In the **Move Items** dialog box, select the new contact folder, and then select **OK**.

   o Select the contact, and then, go to the **Home** tab. In the **Actions** group, select **Move**, and then select **Other Folder**. In the **Move Items** dialog box, select the new contact folder, and then select **OK**.

5. Select the folder to verify that the contacts are now part of the new contacts folder.

Microsoft

Share a contacts folder

After you have created a folder for your contacts, you might want to share these contacts. To share a contacts folder:

1. Locate the folder you want to share in the navigation pane, right-click or access the context menu for the folder, select **Share**, and then select **Share Contacts**.
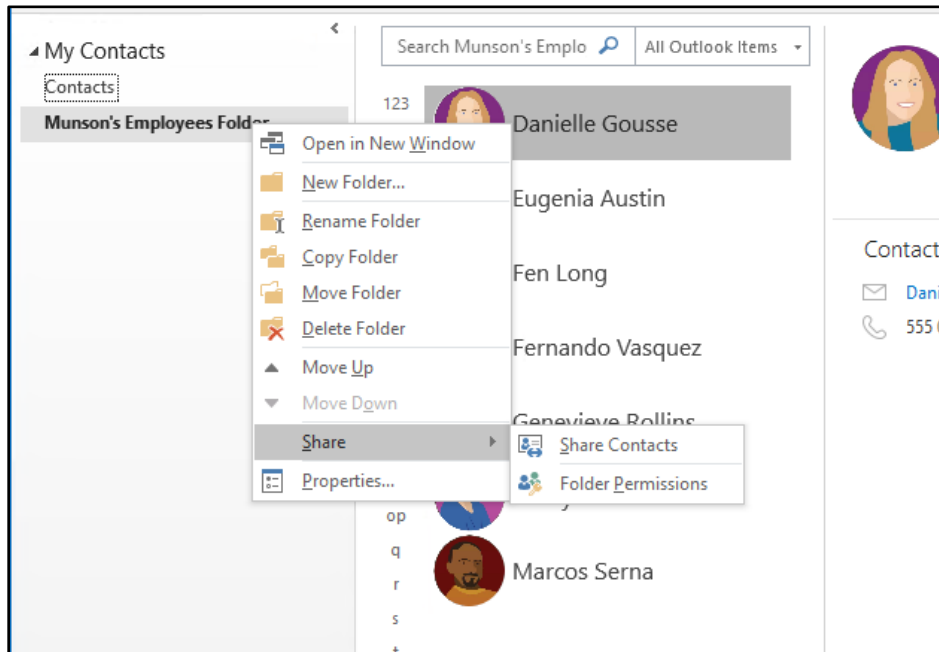
Figure 21: Sharing a contacts folder

2. In the **Sharing invitation** window, in the **To** box, enter the list of recipients that you want to share the folder with.
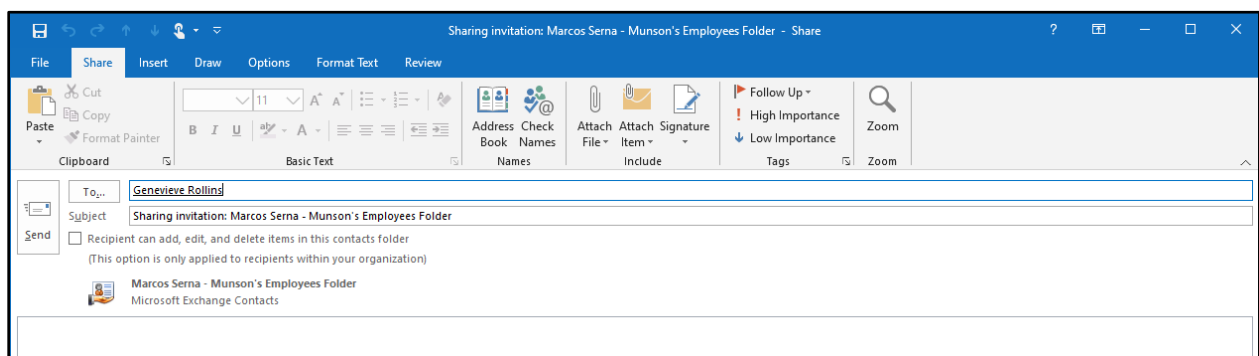
Figure 22: Sharing a contacts folder

3. By default, your recipients can only read your contacts in the shared folder. If you want to grant a higher level of access, select the **Recipient can add, edit, and delete items in this contacts folder** check box. Note that this permissions option can only apply to users within your organization.

Microsoft 47

4. When you have completed the required information, select **Send**.

5. In the **Microsoft Outlook** dialog box, confirm that you wish to share your folder with the listed recipients by selecting **Yes**.
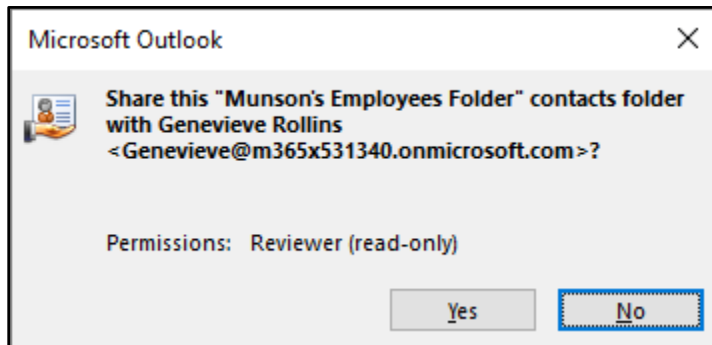
Figure 23: Confirming that you want to share the folder

Open a shared contacts folder

If someone has shared their contacts folder with you, you can open it by using the email invitation they sent. To open a shared contacts folder:

1. Switch to **Mail**.

2. In the list of emails, select the one with the subject that starts with the text **Sharing invitation**.

3. In the details pane, select **Open this Contacts Folder**.
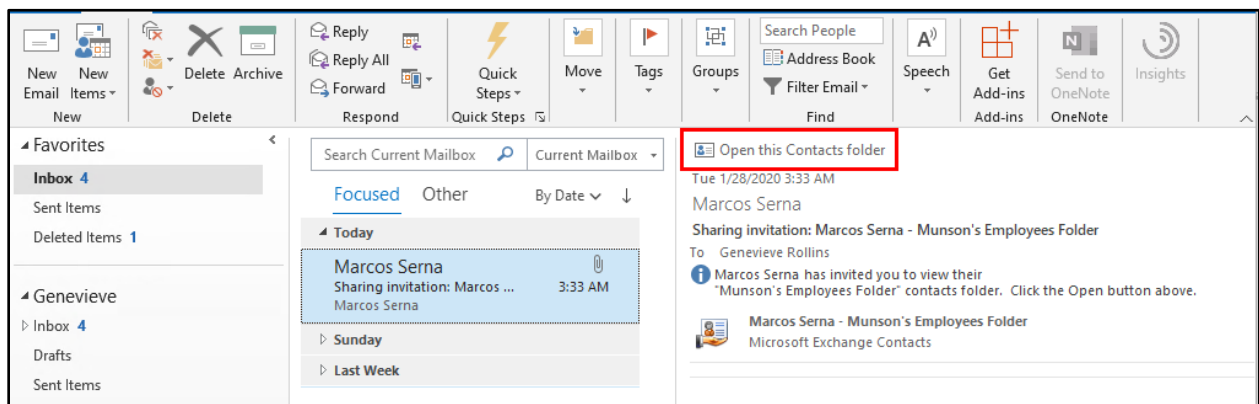
Figure 24: Accepting the invitation to share the folder

When Outlook switches to **People**, the new shared folder displays in the navigation pane within the **Shared Contacts** folder.
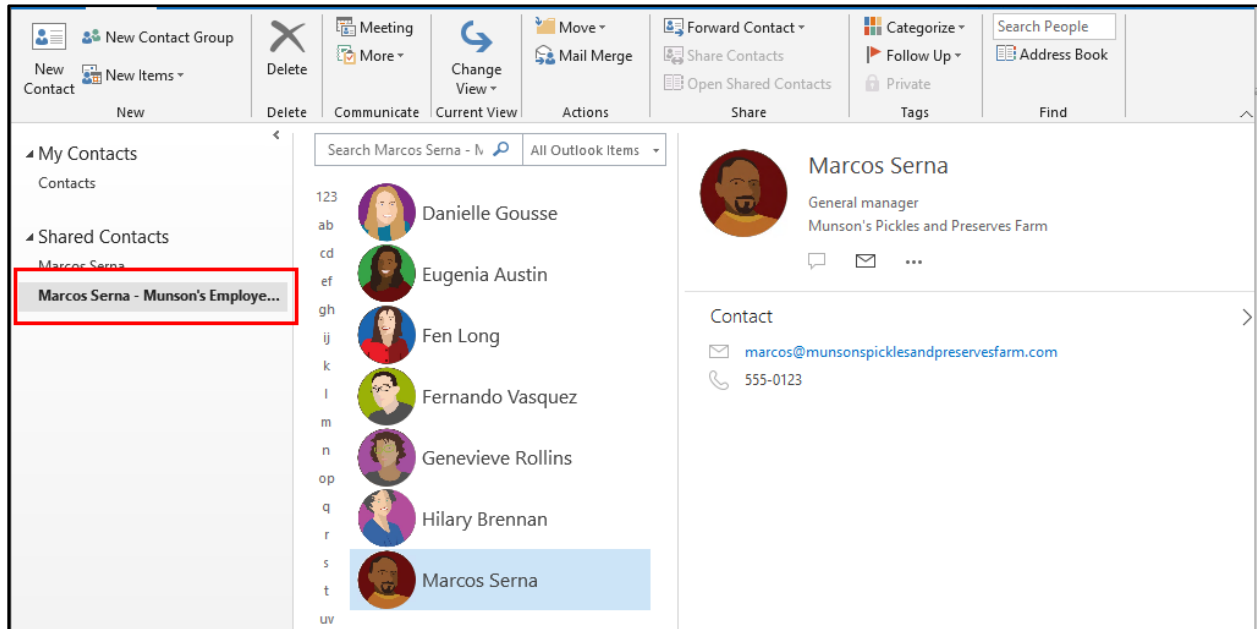
Figure 25: Viewing the shared folder from People
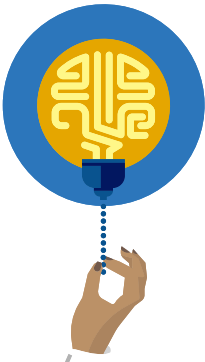
Did you know?

You can share contact folders (and contacts) with users outside your organization, but your email administrator must enable this setting.

Activity: Show and tell

In this activity, your teacher will demonstrate how to create a folder for contacts.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. In Outlook, switch to **People**.

2. In the navigation pane, right-click or access the context menu for the **Contacts** folder, and then select **New Folder**.

3. Name the folder **My Contacts Folder**.

4. In the list of contacts, right-click or access the context menu for **Fen Long**, select **Move**, and then select **My Contacts Folder**.

5. Repeat step 4 for **Danielle Gousse**.

6. Select **My Contacts Folder** to verify that the contacts are now part of the new contacts folder.

7. To share the folder, right-click or access the context menu for the **My Contacts Folder**, select **Share**, and then select **Share Contacts**.

8. In the **Sharing invitation** window, in the **To** box, enter the list of recipients that you want to share this folder with. For example, enter the email address for **Genevieve Rollins**. (Ideally, this will be an email address that is part of your organization and to which you have access.)

9. Select the **Recipient can add, edit, and delete items in this contacts folder** check box, and then select **Send**.

10. In the **Microsoft Outlook** dialog box, confirm that you wish to share your folder with the listed recipients by selecting **Yes**. A message is sent to the recipient (or recipients).

11. Sign in as the recipient you used earlier, and open Outlook.

12. Switch to **Mail**.

13. In the list of emails, select the one with the subject that starts with the text **Sharing invitation**.

14. In the details pane, select **Open this Contacts Folder**.

15. Outlook switches to **People**. In the navigation pane, the new shared folder displays within the **Shared Contacts** folder.

Microsoft

Try-it: Create and share a contacts folder

In this standalone try-it activity, you'll create and share a contacts folder.

Resources

You will need the following resources for this try-it:

- The contacts that you have created within the other activities in Lesson 1 and Lesson 2
- The email address of a partner with whom you want to share the contacts folder

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. In Outlook, switch to **People**.

2. In the navigation pane, right-click or access the context menu for the **Contacts** folder, and then select **New Folder**.

3. Name the folder **Soil management project**.

4. In the list of contacts, right-click or access the context menu for **Fen Long**, select **Move**, and then select **Soil management project**.

5. Repeat step 4 for **Danielle Gousse**.

6. Select **Soil management project** to verify that the contacts are now part of the new contacts folder.

7. To share the folder, right-click or access the context menu for the **Soil management project**, select **Share**, and then select **Share Contacts**.

8. In the **Sharing invitation** window, in the **To** box, enter the list of recipients that you want to share this folder with. Ideally, this will be an email address that is part of your organization and to which you have access. Enter the email address of your partner.

9. Ensure that the **Recipient can add, edit, and delete items in this contacts folder** check box is cleared, and then select **Send**.

10. In the **Microsoft Outlook** dialog box, confirm that you wish to share your folder with the listed recipients by selecting **Yes**. The recipient(s) will receive a message.

11. Switch to **Mail**.

12. In the list of emails, select the one with the subject that starts with the text **Sharing invitation**. This should come from your partner.

13. In the details pane, select **Open this Contacts Folder**.

14. Outlook switches to **People**. In the navigation pane, the **Soil management project** shared folder displays within the **Shared Contacts** folder.

> **Additional information**
>
> For more information on sharing contact folders, go to: <u>Share a contacts folder with others</u>

Topic 2: Forward a contact

If one of your contacts needs information and contact details about another of your contacts, you can forward that contact to them. The process of forwarding a contact is straightforward and helps remove the possibility of error that might be present if you were to manually enter contact details and forward it. Forwarding contacts is an essential skill that can save you time and effort as you collaborate with your teammates.

Forward a contact

To forward a contact, you must first select that contact in your contact list. In **People**, on the **Home** tab, in the **Share** group, select **Forward Contact**, as the following screenshot depicts.
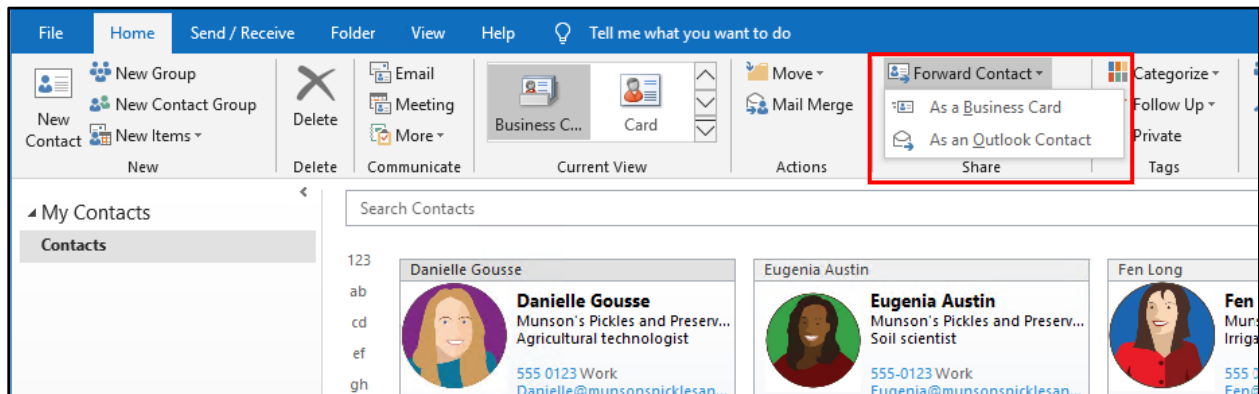
Figure 26: Forwarding a contact

The options to forward are **As a Business Card** and **As an Outlook Contact**. The following screenshot depicts forwarding a contact by using the **As a Business Card** option.
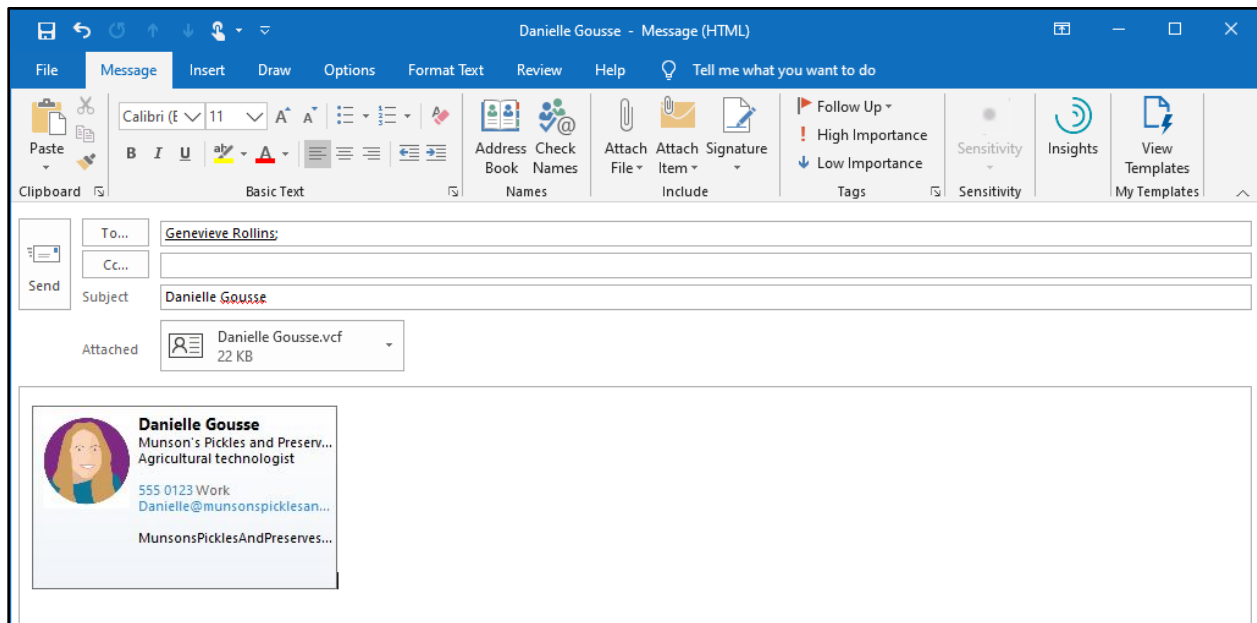
Figure 27: Forwarding a contact as a Business Card

The following screenshot depicts forwarding a contact by using the **As an Outlook Contact** option.
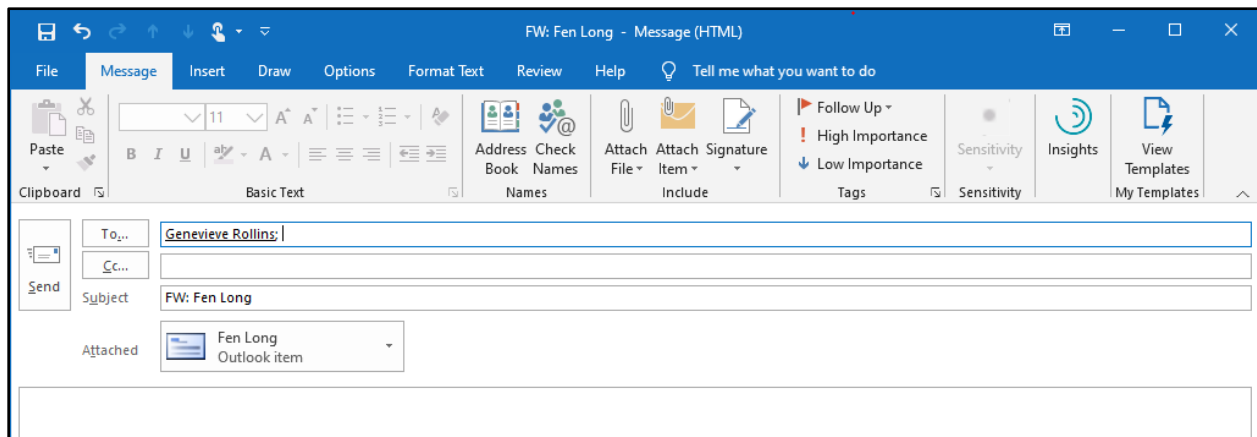
Figure 28: Forwarding a contact as an Outlook Contact

When you use the **As an Outlook Contact** option, the contact's information is forwarded as an email attachment, and therefore includes more detailed information. When you receive an email with contact information (as displayed in the following screenshot), you must open the attachment, and then save the contact.

Microsoft
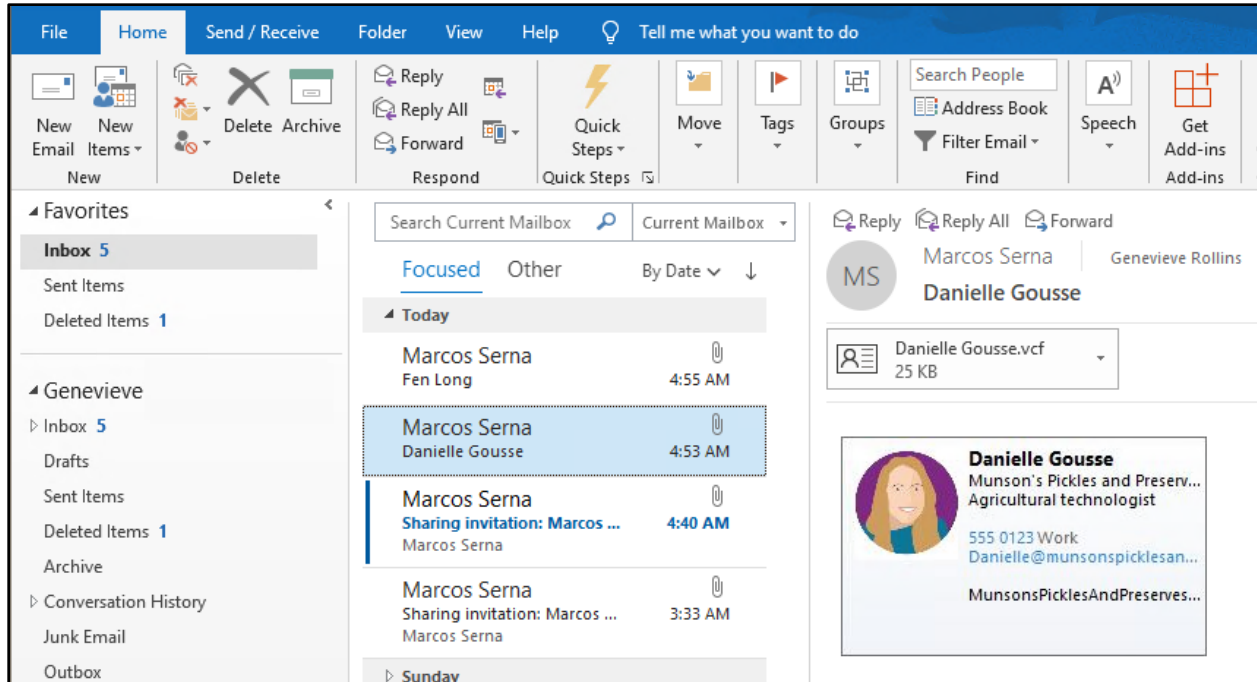
Figure 29: A forwarded contact in an email

The forwarded contact will then display in your contacts list.

Additional information

For more information about forwarding contacts, go to: Forward a contact.

Activity: Pose a challenge

In this activity, you'll attempt to forward a contact to a colleague in the class. Your teacher will guide the class during this activity. Make sure to bring up any questions with your teacher and the rest of the class.

Resources required

You will need the following resources for this activity:

- None

Microsoft

Activity instructions

Participate in the activity by following these instructions:

1. In Outlook, switch to **People**.

2. Follow your teacher's guidance and work with your classmates to learn about forwarding a contact.

Try-it: Forward a contact

In this try-it activity, you'll forward a contact to one of your classmates or your teacher.

Try-it 1

In this try-it, you'll forward a contact from the contact card.

Resources

You will need the following resources for this try-it:

*   The contacts that you created within the other Lesson 1 and Lesson 2 activities
*   A partner that has a functioning email that can send and receive email

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. In Outlook, in **People**, on the ribbon, select **Change View**, and then select **Business Card**.

2. Right-click or access the context menu for **Fen Long**, and then select **Forward Contact**.

3. Select **As a Business Card**.

4. In the **Fen Long** email message, in the **To** box, enter the email address of a classmate or your teacher, and then select **Send**.

5. Switch to **Mail**.

6. Open the message from your classmate or teacher, which begins with the text **Fen Long**. View the attached business card. It's not necessary to save the card.

Try-it 2

In this try-it, you'll forward a contact from the contact list.

Resources

You will need the following resources for this try-it:

- The contacts that you created within the other Lesson 1 and Lesson 2 activities
- A partner that has a functioning email that can send and receive email

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. In **People**, on the ribbon, select **Change View**, and then select **List**.

2. Right-click or access the context menu for **Danielle Gousse**, and then select **Forward Contact**.

3. Select **As an Outlook Contact**.

4. In the **FW: Danielle Gousse** email message, in the **To** box, enter the email address of a classmate or your teacher, and then select **Send**.

5. Switch to **Mail**.

6. Select the message from your student colleague or teacher, which begins with the text **FW: Danielle Gousse**. View the attached Outlook Contact. It's not necessary to save the contact.

Topic 3: Print contact information

You probably connect with many people throughout the day at work, school, and in your personal life. You might also interact with people through different online methods such as social media. By printing your contact information, you can create a hard copy as a quick reference or to save your contact list more securely.

To print an individual contact:

1. In Outlook, switch to **People**.

2. Open a specific contact.

3. On the **File** tab, select **Print**.

4. Select the appropriate printer.

Note: The **Settings** are configured for **Memo Style** because you have selected an individual contact. **Memo Style** displays a single page for a contact, as the following screenshot depicts.
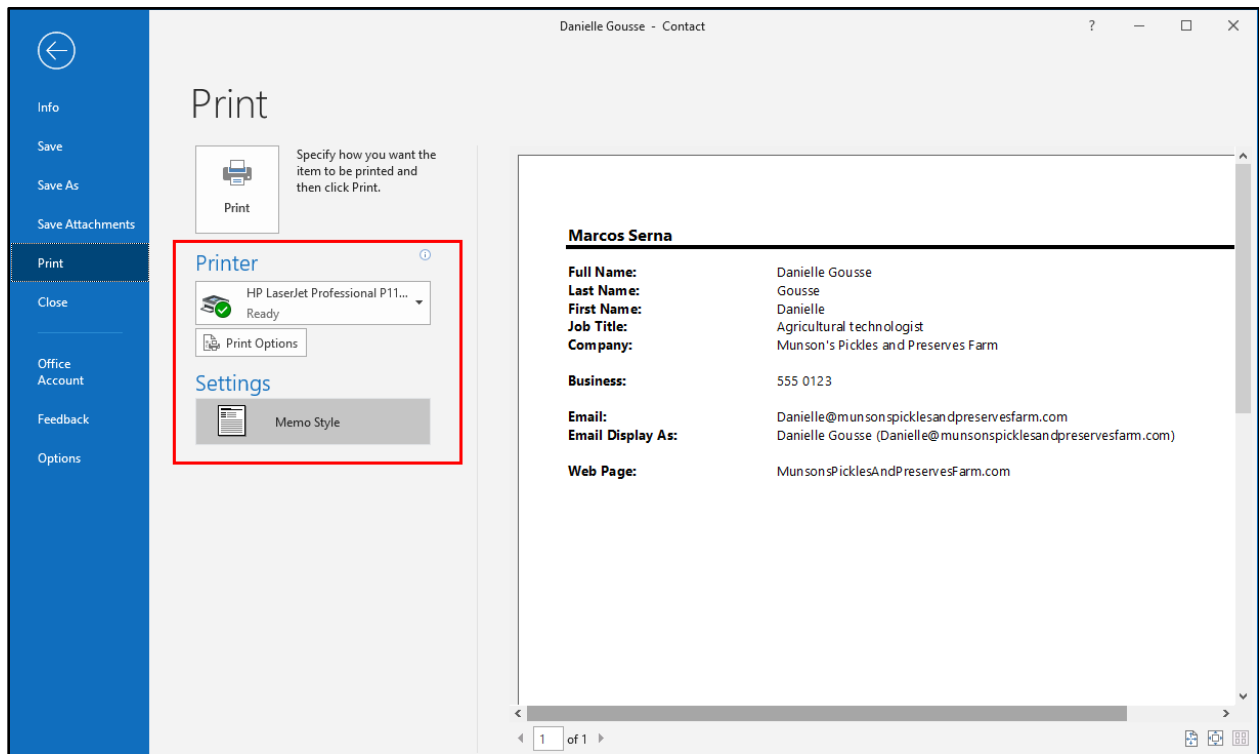
Figure 30: Printing a contact's information

5. When ready, select **Print**.

To print multiple contacts:

1. In Outlook, switch to **People**.

2. Select multiple contacts.

3. From the **File** tab, select **Print**.

4. Select the appropriate printer, and then, under the **Settings** header, select between **Table Style** and **Memo Style**. **Table Style** displays a list of all contacts, as the following screenshot depicts.

Microsoft
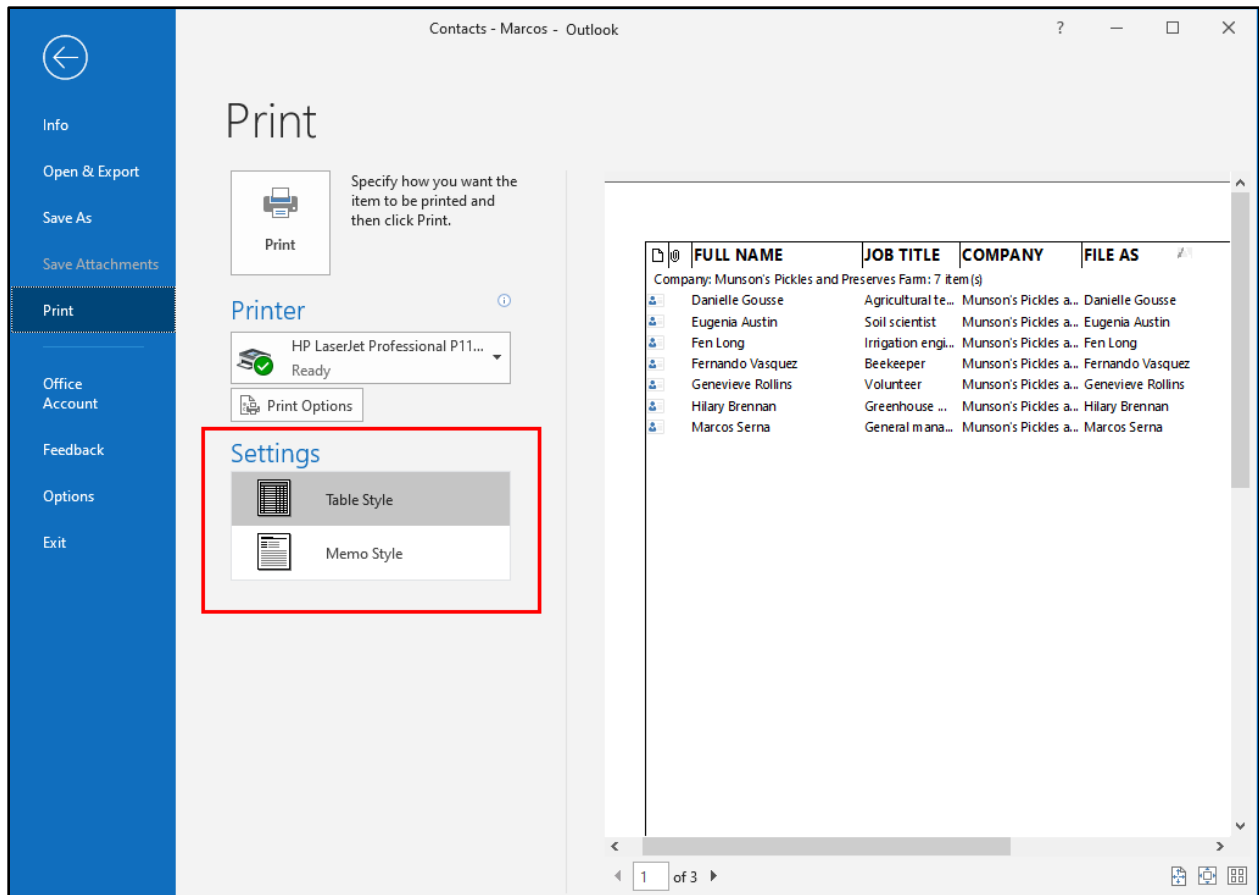
*Figure 31: Printing multiple contacts with **Table Style***

5. When ready, select **Print**.

There are a number of other print styles available, depending on the contacts you have selected and the contact view you are using:

- **Card Style**. Displays an alphabetic list of contacts.
- **Small Booklet Style**. Displays your contacts in an alphabetized list, but divided into separate pages.
- **Medium Booklet Style**. Displays your contacts in an alphabetized list, but divided into separate pages containing fewer contacts per page and using more paper.
- **Phone Directory Style**. Displays an alphabetized list of contacts displaying names and phone numbers only.

The following screenshot depicts some of the different print style options.
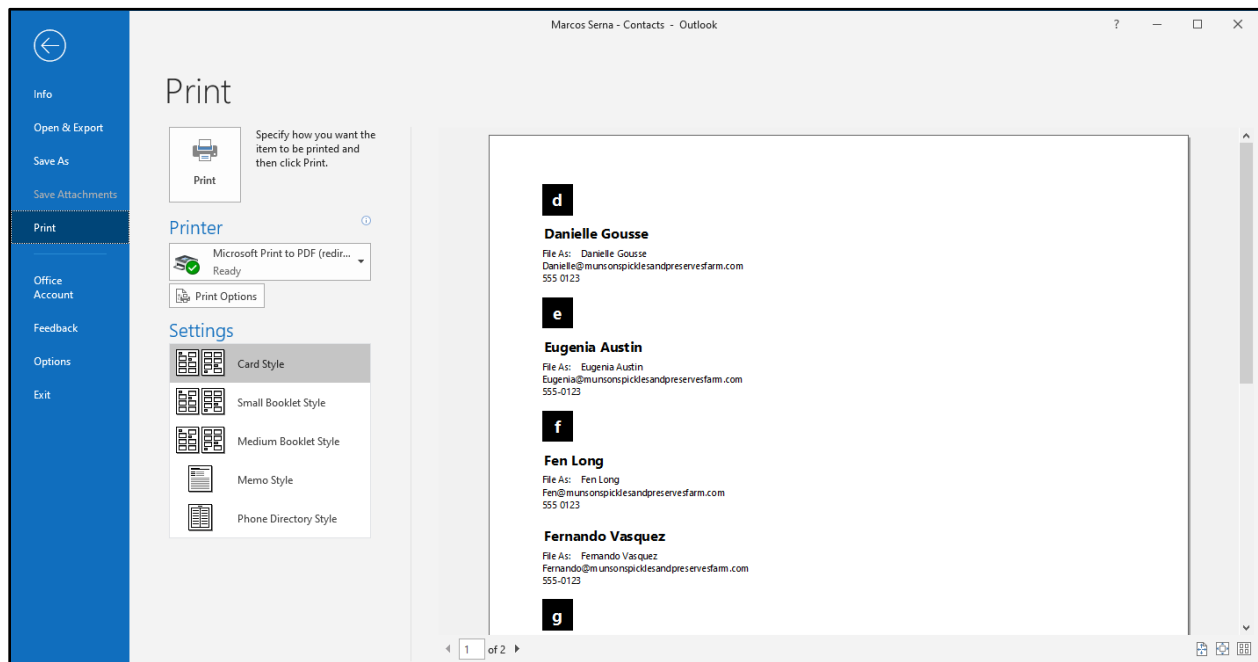
Figure 32: Selecting a print style

Additional information

For more information about printing contacts, go to: Print contacts, messages, or other Outlook items

Activity: Discuss and learn

In this activity, you will discuss with a partner the reasons you might want to keep and print a hard copy of Outlook contacts information.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Your teacher will guide you through this discussion. As you discuss with your partner, consider making a list of questions or concerns you have, and then sharing them with the class.

Try-it: Print contact information

In this leveled try-it activity, you will print contact information from the contact card.

Try-it 1

In this try-it, you'll print a contact from the contact card.

Resources

You will need the following resources for this try-it:

- The contacts that you have created within the other Lessons 1 and 2 activities
- The Microsoft Print to PDF printer or another physical printer in your classroom

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. If necessary, open Outlook and switch to **People**.

2. On the ribbon, select **Change View**, and then select **Business Card**.

3. Open the contact card for **Fen Long**.

4. On the ribbon, select **File**, and then select **Print**.

5. From the **Printer** list select **Microsoft Print to PDF**, and then select **Print**.

6. In the **Save Print Output As** dialog box, in the navigation pane, select **Desktop**.

7. In the **File name** box, enter **Business Card**, and then select **Save**.

8. Optionally, you could choose to review your output by navigating to the desktop and opening the PDF file.

Try-it 2

In this try-it, you'll print contacts from the contact list.

Resources

You will need the following resources for this try-it:

- The contacts that you have created within the other Lessons 1 and 2 activities
- The Microsoft Print to PDF printer or another physical printer in your classroom

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. If necessary, open Outlook and switch to **People**.

2. On the ribbon, select **Change View**, and then select **List**.

3. Select all contacts, on the ribbon, select **File**, and then select **Print**.

4. Select **Microsoft Print to PDF** in the **Printer** list.

5. Select **Table Style** in **Settings**.

6. Select **Print**.

7. In the **Save Print Output As** dialog box, in the navigation pane, select **Desktop**.

8. In the **File name** box, enter **List** and then select **Save**.

9. Optionally, you could choose to review your output by navigating to the desktop and opening the PDF file.

Try-it 3

In this try-it, you'll print a list of contacts as a phone list.

Resources

You will need the following resources for this try-it:

- The contacts that you have created within the other Lessons 1 and 2 activities
- The Microsoft Print to PDF printer or another physical printer in your classroom

Instructions

The following are the general tasks that you need to perform during this try-it:

1. If necessary, open Outlook, and switch to **People**.

2. On the ribbon, select **Change View**, and then select **Phone**.

3. Select all contacts, on the ribbon, select **File**, and then select **Print**.

4. Select **Microsoft Print to PDF** in the **Printer** list.

5. In **Settings**, select **Table Style**, and then select **Print**.

6. In the **Save Print Output As** dialog box, in the navigation pane, select **Desktop**.

7. In the **File name** box, enter **Phone list**, and then select **Save**.

8. Optionally, you could choose to review your output by navigating to the desktop and opening the PDF file.

Microsoft

Wrap-up

Answer the following questions to determine what you learned in this lesson.

1. By default, when you share a folder of contacts, you can do so with anyone.

   Select the correct option.

   a. True

   b. False

2. To print a list of contacts, which print layout must you choose?

   Select the correct option.

   a. **Table Style**

   b. **Memo Style**

3. To help ensure that a shared contact is editable, you must select the _____ check box when sharing the contact.

   Fill in the blank space.

4. A shared contact appears in your _____ folder.

   Fill in the blank space.

Lesson 4: Managing contacts

Overview

Managing contacts is a practice that can greatly improve your productivity. If you have correctly imported, updated, and categorized your contacts, you can coordinate your messages with the correct recipients much more efficiently. In this lesson, you will learn how to perform all these tasks in the **People** workspace.

Warm-up

In the previous lesson, you learned how to share contacts. In this lesson, you'll learn how to manage contacts. Use these questions to find out what you already know about this lesson's topics:

1. The default categories are named after projects.

   Select the correct option.

   a. True

   b. False

2. You can categorize contacts in custom categories.

   Select the correct option.

   a. True

   b. False

3. When working with categories for the first time, you are prompted to _____ the category.

   Fill in the blank space.

4. If you want to print the details of an individual contact, you can do so by selecting _____.

   Fill in the blank space.

Topic 1: Categorize contacts

You can categorize contacts to increase your productivity when emailing multiple people within a group. In addition to sorting contacts by individual names, you can also sort contacts within your categories.

Create a category

To create a category, in the **People** workspace, on the **Home** tab, in the **Tags** group, select **Categorize**. The **Categorize** command provides a number of category options that are named by color, as the following screenshot depicts.
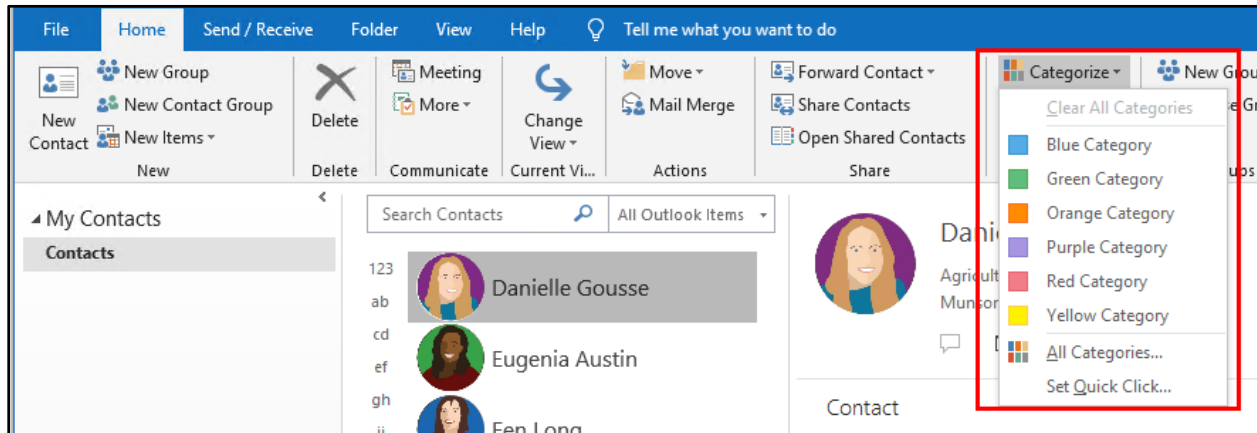
Figure 33: The default color-coded categories

You can change the name of each category by selecting **All Categories**, and then renaming a category in the **Color Categories** dialog box. You can add categories to your contacts, just as you can with tasks, notes, email messages, and calendar invites. To do this, select a person from the **Contacts** list. On the ribbon, select **Categorize**, and then select the appropriate category. As depicted in the following screenshot, the contact now has a color bar in the contact window. To view your contacts in individual windows, simply double-click the appropriate contact name, or select it, and then select Enter.

Microsoft
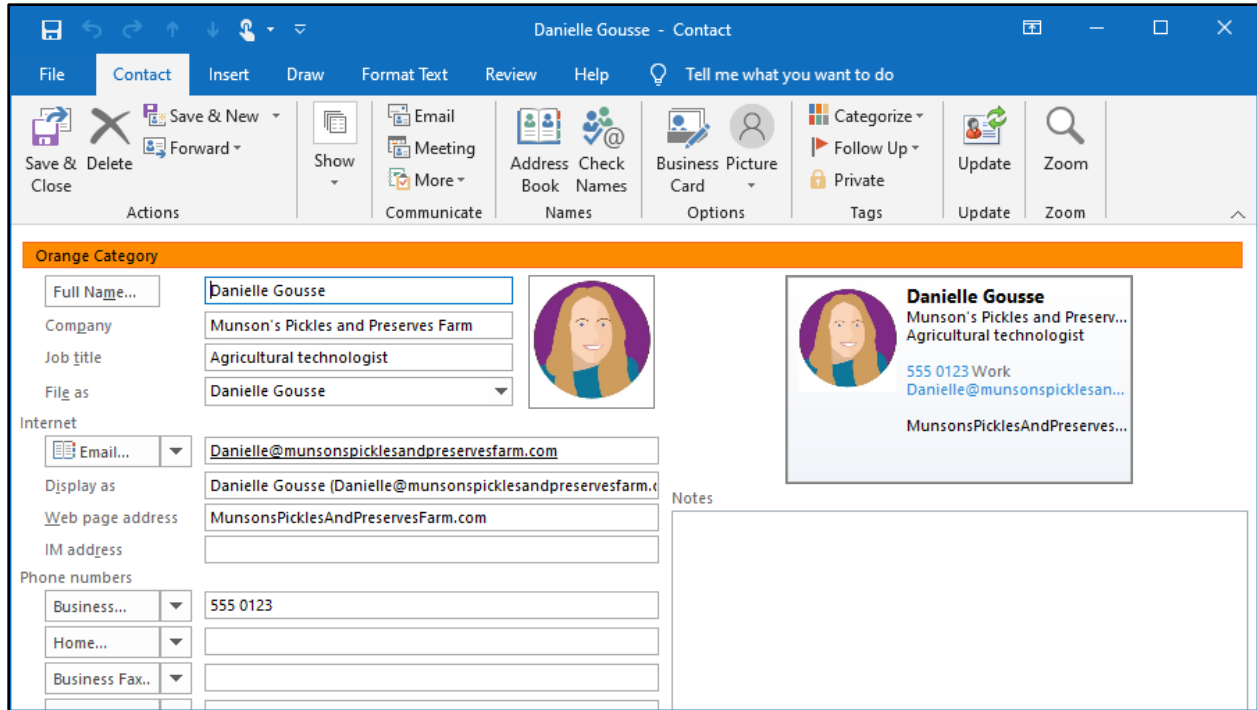
Figure 34: An individual Business Card contact with the Orange Category applied

Additional information

For more information on managing contact categories, go to: Add contacts to color categories

Video

To review a video on managing and assigning categories, go to: Set categories, flags, reminders, or colors

Activity: Think-pair-share

In this activity, you'll work with a partner to determine names of categories you might use for assigning to your contacts.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Your teacher will guide you through this activity.

Try-it: Categorize contacts

In this try-it activity, you'll learn how to work with categorizing contacts.

Try-it 1

In this try-it, you'll categorize a contact from the **Business Card** view.

Resources

You will need the following resources for this try-it:

* None

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. If necessary, in Outlook, switch to **People**.

2. On the ribbon, select **Change View**, and then select **Business Card**.

3. Open the **Fen Long** contact.

4. On the ribbon, in **Tags**, select **Categorize**, and then select **Yellow Category**.

5. In the **Rename Category** dialog box, in the **Name** box, notice that it currently displays **Yellow Category**. Enter the text **Project 1**, and then select **Yes**.

6. On the ribbon, select **Save & Close**.

Try-it 2

In this try-it, you'll categorize contacts from the **List** view.

Resources

You will need the following resources for this try-it:

* None

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. On the ribbon, select **Change View**, and then select **List**.

2. Select the first two contacts.

Microsoft

3. On the ribbon, in **Tags**, select **Categorize**, and then select **Red Category**.

4. In the **Rename Category** dialog box, in the **Name** box, notice that it displays **Red Category**. Enter the text **Project 2**, and then select **Yes**.

Topic 2: Flag a contact for follow-up

A **Follow Up** flag is a useful reminder that helps you stay up to date with ongoing tasks or communication. Similar to tasks, a **Follow Up** flag alerts you to still need to complete an action that you probably needed more information on, or time to work on.

Flag a contact

To flag a contact, select the appropriate contact. On the **Home** tab, in the **Tags** group, select **Follow Up**, and then select the timeline for the follow-up, as the following screenshot depicts.
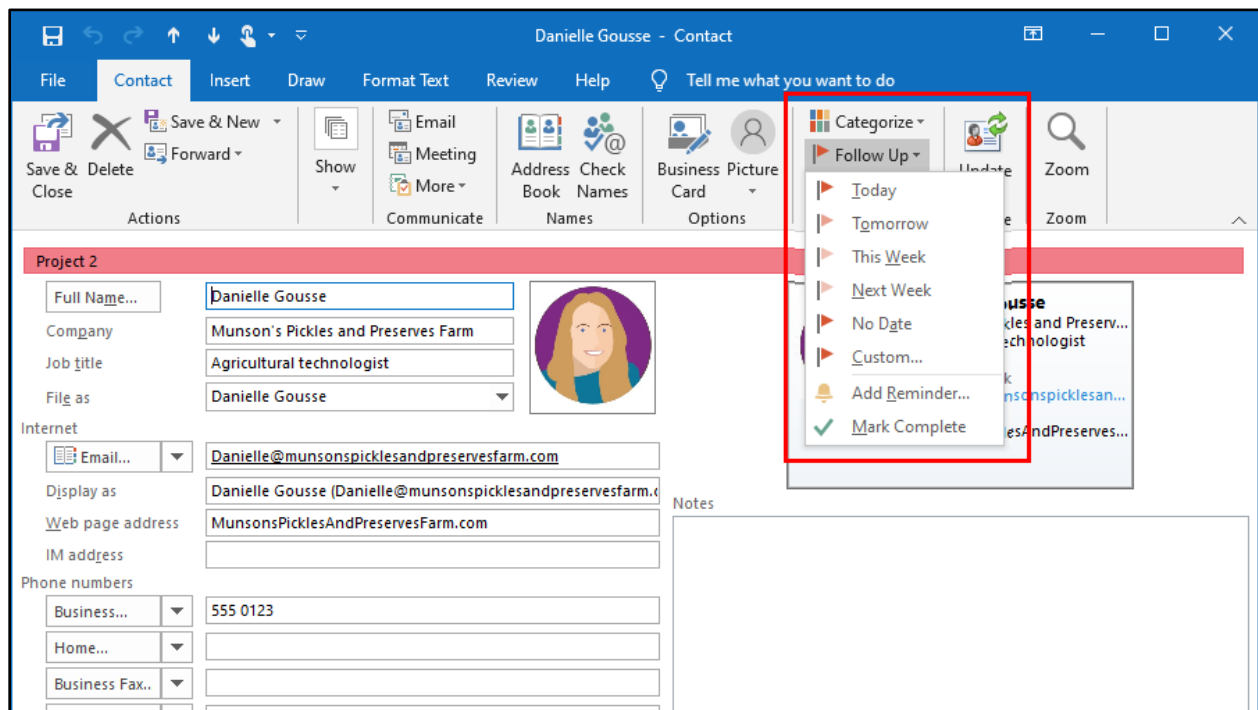
Figure 35: Assigning follow up for a contact

To verify the follow-up duration, select the contact, and then select Enter. This will display the full contact detail and the follow-up commitment. The following screenshot depicts a contact card with the follow-up flag.
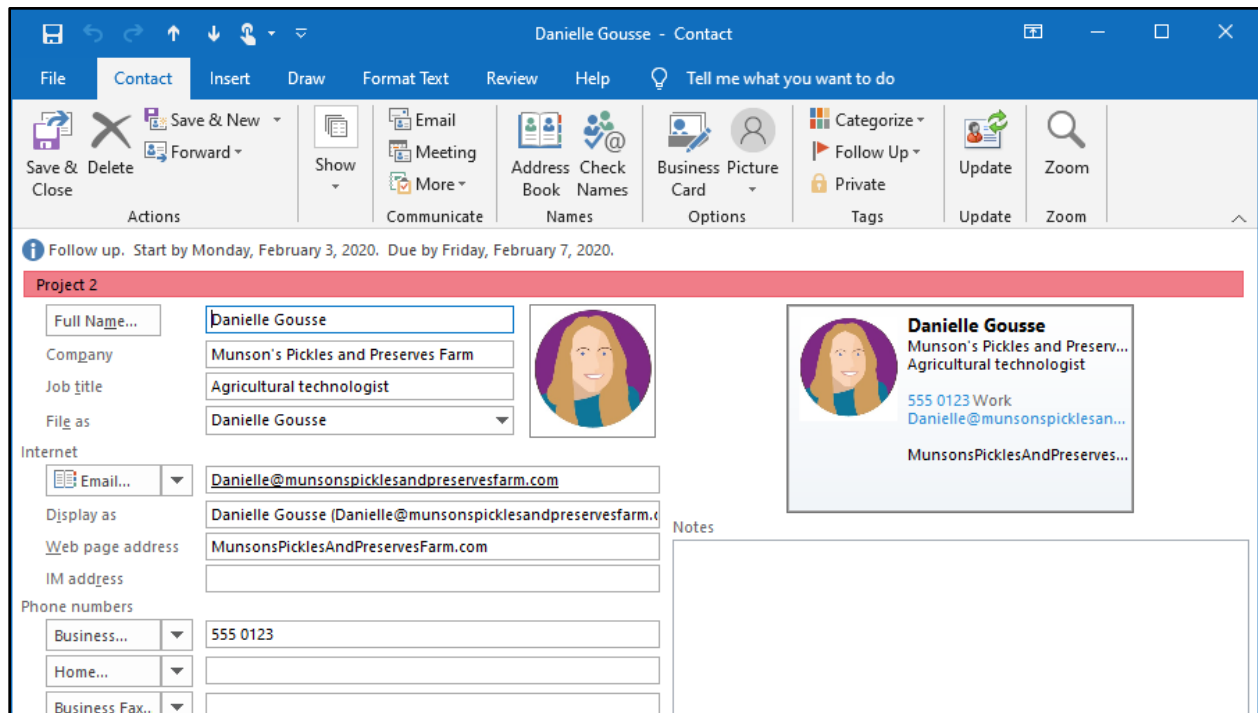
Figure 36: Reviewing follow-up information for a contact

Activity: Discuss and Learn

In this activity, you will discuss reasons and real-life scenarios in which you would use **Follow Up** flags in Outlook. Share experiences in which a follow up would have been helpful and important to have.

Resources required

You will need the following resources for this activity:

• None

Activity instructions

Your teacher will guide you through this discussion. Use the following points to help with the discussion:

1. Consider scenarios in which you would use a flag that would require a follow-up.

2. Identify how a follow-up flag displays in the contact's detail page.

Try-it: Flag a contact for follow-up

In this leveled try-it activity, you'll flag a contact for follow-up by using the **Home** tab.

Try-it 1

In this try-it, you'll apply a follow-up flag to the contact card.

Resources

You will need the following resources for this try-it:

- None

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. If necessary, in Outlook, switch to **People**.

2. On the **View** tab, in the **Current View** group, select **Change View**, and then select **Card**.

3. Right-click or access the context menu for **Fen Long**.

4. From the context menu, select **Follow Up**.

5. Select **Next Week**.

6. Open **Fen Long's** contact information, and verify that follow up is configured for next week.

7. Close the contact.

Try-it 2

In this try-it, you'll apply a follow-up flag to a contact by using the contact **List** view.

Resources

You will need the following resources for this try-it:

- None

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. On the **View** tab, in the **Current View** group, select **Change View**, and then select **List**.

2. Select and open the **Danielle Gousse** contact.

3. On the ribbon for the open contact, select **Follow Up**, and then select **Tomorrow**.

4. Select **Save & Close**.

Try-it 3

In this try-it, you'll apply a follow-up flag to multiple contacts.

Resources

You will need the following resources for this try-it:

- None

Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Select the first three contacts, and then on the **Home** tab, in the **Tags** group, select **Follow Up**.

2. Select **This Week**.

3. Open one of the contacts you modified, and verify that **Follow Up** is for this week.

4. Close the contact.

Wrap-up

Answer the following questions to determine what you learned in this lesson.

1. You want a colleague to have access to a number of your contacts. How can you do this quickly and efficiently?

   Select all that apply.

   a. Copy the contact details into the Office **Clipboard**, and paste them into an email.

   b. Forward a contact by email to your colleague.

   c. Share a contact with your colleague

   d. Print a contact list and deliver it to your colleague.

2. You want to forward a contact to a colleague in your organization. Which of the following options is a supported format?

   Select all that apply.

   a. **List**

   b. **Business Card**

   c. **Card**

   d. **Outlook Contact**

3. You want to print a list of your contacts' telephone numbers as an alphabetical list. To do this, you need to choose the _____ print style.

   Fill in the blank space.

4. It's important to get back in touch with one of your contacts. You need to set a _____ on the contact for **Next Week**.

   Fill in the blank space.

Glossary

The following table defines the key terms used in the module.

Categorize	A command that you can use to organize your contacts in user-defined categories.
Forward Contact	A command that you can use to share a contact with a colleague.
Navigation Bar	Icons that you can use to switch between **Mail**, **Calendar**, **People**, **Tasks**, **Notes**, **Folders**, and **Shortcuts**.
Print Preview	A pane that displays your print output without actually printing the output. Outlook always creates a preview on the **Print** page.
Tag	A means to highlight a contact with a **Follow Up** flag, or with high or low importance.
View	Preset or customizable ways to review information in Outlook workspaces.

Table 7: Glossary terms and definitions

Microsoft

Detach the module .pst file

After you complete all try-its, you must detach your .pst file so your teacher can assess your work. To do this:

1. In Outlook, on the **Navigation Bar**, select the ellipsis (**Navigation Menu** button), and then select **Folders**.

2. Locate the folder named **M6_module_PST_starter_Firstname_Lastname**, and right-click or access the context menu for the folder.

3. On the context menu, select **Close** "**M6_module_PST_starter_Firstname_Lastname**".

4. On your computer, open **File Explorer**, and then browse to where the .pst file resides.

5. Right-click or access the context menu for the file, and then select **Rename**.

6. Append your name to the end of the existing file name by using underscores instead of spaces. For example, enter **_Firstname_Lastname**. The filename should now resemble **M6_module_PST_starter_Firstname_Lastname**.

7. Copy the .pst file to the designated location for assessment.

Cornerstone

Overview

In this cornerstone, you'll help the volunteer coordinator at Munson's Pickles and Preserves Farm by managing the farm volunteer contact list.

Objectives

The following table outlines the cornerstone objectives and their corresponding Microsoft Office Specialist (MOS) exam objectives.

Cornerstone project objectives	Exam objective(s)
Create and update contacts	• 1.1.1: Change the display of messages, calendar items, contact records, and tasks • 4.1.1: Import contacts from external sources • 4.1.2: Edit contact information
Use contact groups	• 4.2.1: Create and delete contact groups • 4.2.2: Add contacts to existing contact groups • 4.2.4: Delete contact group members
Share and categorize contacts	• 4.1.3: Share contacts

Table 8: Cornerstone objectives

Duration

50 minutes

Attach the Cornerstone .pst file

To complete this Cornerstone, you must attach this .pst file into Outlook before you can perform any tasks. You'll also store the results of your tasks in this .pst file so that your teacher can assess your working by examining that file.

Microsoft

To open the .pst file in Outlook:

1. Open Outlook.

2. Select the **File** tab, and then select **Open & Export**.

3. In the **Open** pane, select **Open Outlook Data File**.

4. In the **Open Outlook Data File** dialog box, use the navigation pane to locate the .pst files provided by your instructor for your use throughout this module of the course.

5. Open the file named **M6_cornerstone_PST_starter**. Note that a folder **M6_cornerstone_PST_starter** is now available in the navigation pane. This folder contains any required starter elements for the Cornerstone, such as emails, calendar appointments, tasks, and contacts.

6. Right-click or access the context menu for the **M6_cornerstone_PST_starter** folder, and then select **Data File Properties**.

7. In the **M6_cornerstone_PST_starter Properties** dialog box, select **Advanced**.

8. In the **Outlook Data File** dialog box, in the **Name** box, append your name to the end of the existing name by using underscores instead of spaces. For example, enter _Firstname_Lastname. The folder name should now resemble **M6_cornerstone_PST_starter_Firstname_Lastname**.

9. Select **OK** twice.

Copy content into the Cornerstone .pst file

As you proceed through this Cornerstone's tasks, you should copy the resulting elements, such as emails, calendar appointments, tasks, and contacts, to the **M6_cornerstone_PST_starter_Firstname_Lastname** folder by using the following instructions:

1. After you attach the .pst file, you should be able to observe duplicate folders for items such as emails, calendar appointments, tasks, and contacts.

2. After you complete a try-it exercise, select your resulting items in the navigation pane. Make sure you select the items that are associated with your email account.

3. In the details pane, right-click or access the context menu for each item, and then, select **Copy** or select Ctrl+C.

4. Select the **M6_cornerstone_PST_starter_Firstname_Lastname** folder.

5. Select Ctrl+V to copy the item to the .pst file.

6. Repeat steps 3 through 5 for any additional items that you want to copy.

Instructions

1. Complete the following tasks for each file.

2. When you're done with the cornerstone, assess your completion and enter the points you think you earned within the following task lists. You can ask for the help of your teacher if required.

Tasks

The following sections describe the tasks you'll need to do for this cornerstone.

File 1: M6_cornerstone_PST_starter.pst

Task 1: Create contacts (15 points)

1. In Outlook 2019, switch to **People**.

2. Create a new contact with the following properties:

   o Full Name: **Danielle Gousse**

   o Company: **Munson's Pickles and Preserves**

   o Job title: **Agricultural technologist**

   o File as: **Gousse, Danielle**

   o Email: **Danielle@munsonspicklesandpreservesfarm.com**

   o Business phone number: **555 0123**

   o If available on your computer, add the appropriate image for this contact (3 points) (Exam objective: 4.1.2)

3. Create a new contact with the following properties:

   o Full Name: **Fen Long**

   o Company: **Munson's Pickles and Preserves**

   o Job title: **Irrigation engineer**

   o File as: **Long, Fen**

   o Email: **Fen@munsonspicklesandpreservesfarm.com**

   o Business phone number: **555 0123**

   o If available on your computer, add the appropriate image for this contact (3 points) (Exam objective: 4.1.2)

4. In **Mail**, locate and open the **Staff profiles** message. This will reside in the **Inbox** folder of the **M6_cornerstone_PST_starter_*Firstname_Lastname*** .pst you attached earlier.

5. Right-click or access the context menu for the message originator, **Genevieve Rollins**, and then select **Add to Outlook Contacts**.

6. Save the contact. (4 points) (Exam objective: 4.1.2)

7. Right-click or access the context menu for one of the recipients, **Hilary Brennan**, and then select **Add to Outlook Contacts**.

8. Modify the **Company** field, changing it to **Munson's Pickles and Preserves**.

9. Change **File as** to **Hilary Brennan**.

10. In the **Email** box, enter **Hilary@Munsonspicklesandpreservesfarm.com**.

11. Save the contact.

12. Switch to **People**.

13. Open **Genevieve Rollins**.

14. In the **Company** box, enter **Munson's Pickles and Preserves**.

15. Change **File as** field to **Genevieve Rollins**.

16. Modify the **Email** field to **Genevieve@Munsonspicklesandpreservesfarm.com**.

17. Save the contact. (5 points) (Exam objective: 4.1.2)

Points scored: _____ /15

Task 2: Export and import contacts (10 points)

1. In Outlook 2019, in **People**, select the **File** tab, and then select **Open & Export**.

2. In the **Open** pane, select **Import/Export**.

3. Select **Export to a file**.

4. Select **Comma Separated Values**.

5. In the **Export to a File** dialog box, make sure **Contacts** is selected.

6. Browse to and select **Desktop**.

7. Save the file as **Contacts**.

8. Browse to the **Desktop** on your computer and verify the presence of the file. (5 points)

9. In Outlook, select the **File** tab, and then select **Open & Export**.

Microsoft

10. In the **Open** pane, select **Import/Export**.

11. In the **Import and Export Wizard**, select **Import from another program or file**.

12. Select **Command Separated Values**.

13. Browse to and open your **Contacts** .csv file (on the desktop).

14. Select **Allow duplicates to be created**.

15. In the next window, **Import a File**, select the destination location. The default, **Contacts**, is appropriate.

16. After the import, verify that you have duplicates of your original contacts because you selected to allow duplicates.

17. Delete the newly created duplicates. (5 points) (Exam objective: 4.1.1)

Points scored: _____ /10

Task 3: Manage contact groups (15 points)

1. In Outlook 2019, select **People**, and on the ribbon, select **New Contact Group**.

2. Name the group **CSA Program Volunteers**.

3. Add all available contacts to the group and save the group. (5 points) (Exam objectives: 4.2.1, 4.2.2)

4. Create a new contact with the following properties:

    o Full Name: **Alex Nino**
    o Company: **Best For You Organics Company**
    o Email address: **Alex@bestforyouorganics.com**
    o Job title: **Manager**
    o File as: **Alex Nino**

5. Add the newly created contact, **Alex Nino**, to the **CSA Program Volunteers** group.

6. Remove **Fen Long** from the group, and then save the changes. (5 points) (Exam objectives: 4.2.1, 4.2.4)

7. In the contacts list, select the **CSA Program Volunteers** contact group.

8. On the ribbon, select **Delete**. (5 points) (Exam objective: 4.2.1)

Points scored: _____ /15

Task 4: Manage contacts (10 points)

1. Select **Danielle Gousse**.

2. On the ribbon, select **Share Contacts**.

3. In the **Sharing invitation - Contacts - Share** dialog box, in the **To** box, enter the email address of a fellow student or your teacher, and then select **Send**.

4. When prompted, select **Yes** to set the contacts list as read-only for your partner. (4 points)

5. In the contacts list, select **Fen Long**. On the ribbon, select **Forward Contact**, and then select **As a Business Card**.

6. In the **Fen Long - Munson's Pickles and Preserves - Message (HTML)** dialog box, in the **To** box, enter the email address of a student or your teacher, and then select **Send**. (4 points) (Exam objectives: 1.1.1, 4.1.3)

7. Switch to **Mail** and locate the email messages your student partner has sent to you. These are a **Sharing Invitation** and a contact business card. Review these messages.

8. In the **Sharing Invitation** message, select **Open this Contacts** folder. You should observe the contact list from your colleague.

9. Switch back to **Mail**.

10. Open the remaining email, and verify that a business card displays in the details of the message. (2 points) (Exam objective: 4.1.3)

Points scored: _____ /10

TOTAL POINTS: _____ /50

Detach the Cornerstone .pst file

After you complete all tasks, you must detach your .pst file so that your teacher can assess your work. To do this:

1. In Outlook, on the **Navigation Bar**, select the ellipsis (**Navigation Menu** button), and then select **Folders**.

2. Locate the folder called **M6_cornerstone_PST_starter_Firstname_Lastname**, and right-click or access the context menu for the folder.

3. On the context menu, select **Close** "**M6_cornerstone_PST_starter_Firstname_Lastname"**.

4. On your computer, open **File Explorer**, and go to the path where the .pst file resides.

5. Right-click or access the context menu for the file, and then select **Rename**.

Microsoft

6. Append your name to the end of the existing file name by using underscores instead of spaces. For example, enter **_Firstname_Lastname**. The filename should now resemble **M6_cornerstone_PST_starter_Firstname_Lastname**.

7. Copy the .pst file to the designated location for assessment.
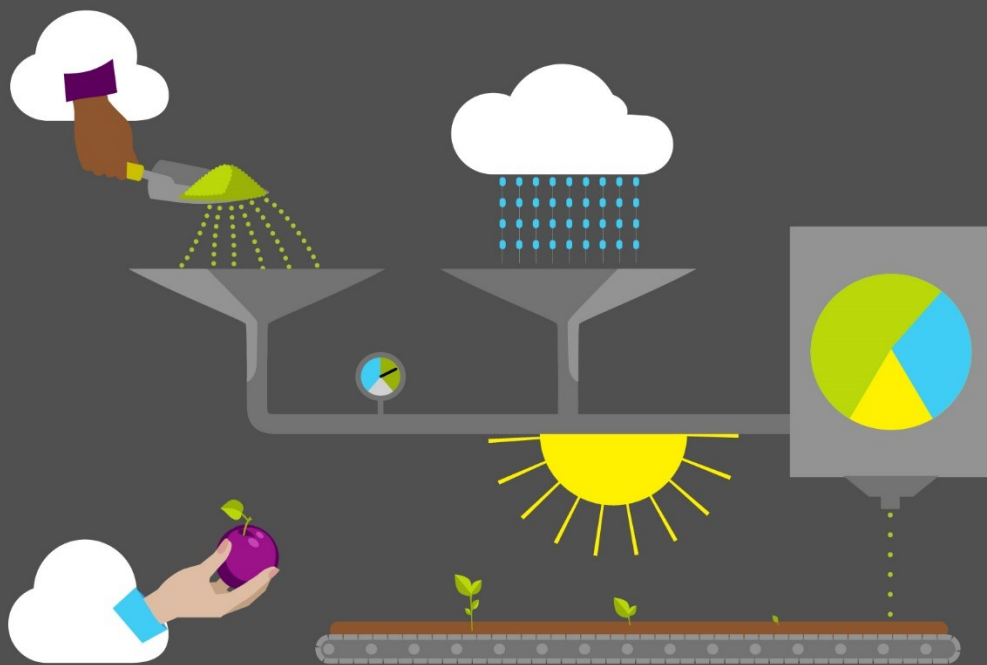
Student Guide

40569A
Microsoft Outlook associate 2019

Module 7: Managing tasks and notes

Contents

Microsoft

Microsoft

Module overview

Description

With our busy lives and all that we must remember, it's not surprising that we occasionally forget to do something. You can use the **Calendar** in Microsoft Outlook 2019 to manage appointments, such as meetings and calls, but there are some events that you cannot easily categorize as either meetings or calls.

Currently, you might jot down tasks, reminders, and notes in a diary or desk organizer, or even on the back of an envelope. While this practice is simple, it also has limits. For example, you must remember to observe your paper list, and where necessary, take the list (such as a shopping list) with you.

Often overlooked, the **Tasks** and **Notes** views in Outlook provide a convenient means of managing simple events and reminders and can help replace paper-based lists and notes. This module describes how you can use Outlook to manage your tasks and notes.

The following table outlines the lessons in this module and their corresponding learning objectives.

Lesson	Learning objective	Exam objective(s)
Creating and printing your tasks	Create, update, tag, and print tasks.	• 4.3.1
Using task assignments	Create and manage task assignments and send status reports.	• 1.1.1 • 1.4.1 • 4.3.1
Creating and sharing notes	Create, customize, print, and forward notes.	None
Cornerstone: Creating tasks and notes to organize your workload	Organize your workload by using tasks and notes in Outlook.	All of the above

Table 1: Objectives by lesson

Microsoft

Scenario

Your work at Munson's Pickles and Preserves Farm has been very rewarding over the past year. Even though winter is a slow season for outside activities, the farm is busy planning next year's events and readying farm equipment for spring planting.

Paper to-do lists and personal notes clutter your desk. This is the perfect time to organize your notes and lists in your Outlook mailbox.

Cornerstone

This module concludes with a Cornerstone, in which you'll work with both tasks and notes. In the Cornerstone, you'll:

- Create and print tasks.
- Assign tasks.
- Create and share notes.

Lesson 1: Creating and printing your tasks

Overview

You can create a task as a reminder to do something. Once the task is complete, you can check it off your list. However, you can do much more with Outlook tasks. You can flag them, categorize them, add multiple steps to them (like a simple project plan), assign them to team members, configure a completion schedule, and more. You can also easily take your tasks with you, because Outlook stores them and they are available across your Windows (and other) devices.

Warm-up

Ask your neighbor if they have any questions about the topics covered in Module 6. Help them if you can, then use these questions to find out what you already know about this lesson's topics.

1. Which of the following is a task tag?

   Select the correct option.

   a. **Private**

   b. **High Importance**

   c. **Follow Up** flag

   d. All of the above

2. Which of the following is a valid **Follow Up** flag?

   Select the correct option.

   a. **High Importance**

   b. **Call**

   c. **Reminder**

   d. **Private**

3. If you delete a task, from where can you recover it?

   Select the correct option.

   a. The **Deleted Items** folder in Outlook

   b. The **Recycle Bin** in Windows

   c. The **Garbage** folder in **Tasks**

   d. There is no way to recover deleted tasks

4. You can customize your task list view by accessing the _____ button on the ribbon in **Tasks**.

   Fill in the blank space.

5. To print a list of tasks, select the _____ in the print window.

   Fill in the blank space.

6. Tasks which are due highlight in _____ in the task list.

   Fill in the blank space.

Attach the module .pst file

To provide the most effective learning experience, this module includes an external Outlook Data File, or .pst file. It resides in a location that your teacher will provide. To complete this module, you must attach this .pst file into Outlook before you can perform any try-its. You'll also store the results of your try-its in this .pst file. This allows your teacher to assess your work by examining the .pst file's contents.

To open the .pst file in Outlook:

1. Open **Outlook**.

2. Select the **File** tab, and then select **Open & Export**.

3. In the **Open** pane, select **Open Outlook Data File**.

4. In the **Open Outlook Data File** dialog box, use the **navigation** pane to locate the .pst files provided by your instructor for your use throughout this module of the course.

5. Open the file named **M7_module_PST_starter**. Note that a folder **M7_module_PST_starter** is now available in the navigation pane. This folder contains any required starter elements for the module, such as emails, calendar appointments, tasks, and contacts.

6. Right-click or access the context menu for the **M7_module_PST_starter** folder, and then select **Properties**.

7. In the **M7_module_PST_starter Properties** dialog box, select **Advanced**.

8. In the **Outlook Data File** dialog box, in the **Name** box, append your name to the end of the existing name by using underscores instead of spaces. For example, enter **_Firstname_Lastname**. The folder name should now resemble **M7_module_PST_starter_Firstname_Lastname**.

9. Select **OK** twice.

Copy content into the module .pst file

As you proceed through this module's try-its, you should copy the resulting elements, such as emails, calendar appointments, tasks, and contacts, to the **M7_module_PST_starter_Firstname_Lastname** folder by using the following instructions:

1. After you attach the .pst file, you should be able to observe duplicate folders for items such as emails, calendar appointments, tasks, and contacts.

2. After you complete a try-it exercise, select your resulting items in the navigation pane. Make sure you select the items that are associated with your email account.

3. In the details pane, right-click or access the context menu for each item, and then select **Copy or** select Ctrl+C.

4. Select the **M7_module_PST_starter_Firstname_Lastname** folder.

5. Select Ctrl+V to copy the item to the .pst file.

6. Repeat steps 3 through 5 for any additional items that you want to copy.

Topic 1: Create and flag tasks

In this topic, you'll create a task, use a **Follow Up** flag for a task, and add tags to tasks. Before learning the details of using and managing tasks, it's important that you know how to access tasks. To access tasks, locate the **Tasks** view from the **Navigation Bar**, which the following screenshot depicts.

Microsoft
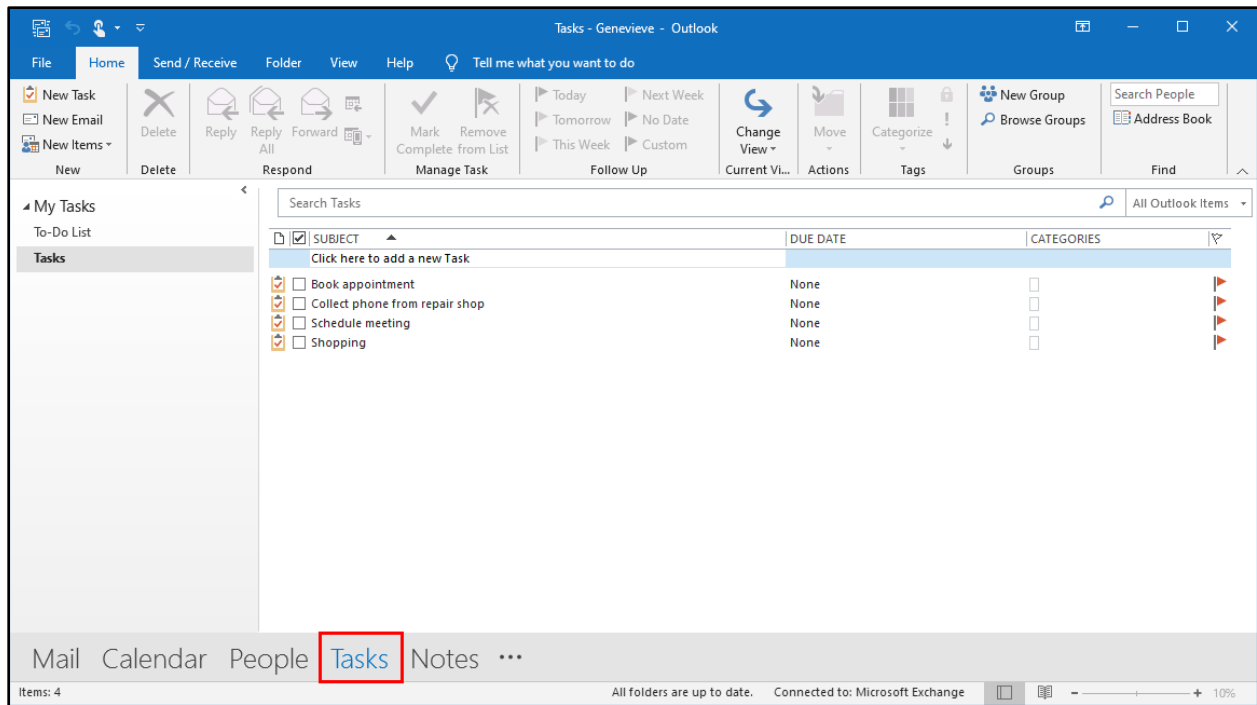
*Figure 1: The **Tasks** folder in Outlook 2019*

When you select **Tasks**, there are two default nodes or folders, **To-Do List** and **Tasks**, in the **navigation** pane. The following screenshot highlights these folders.
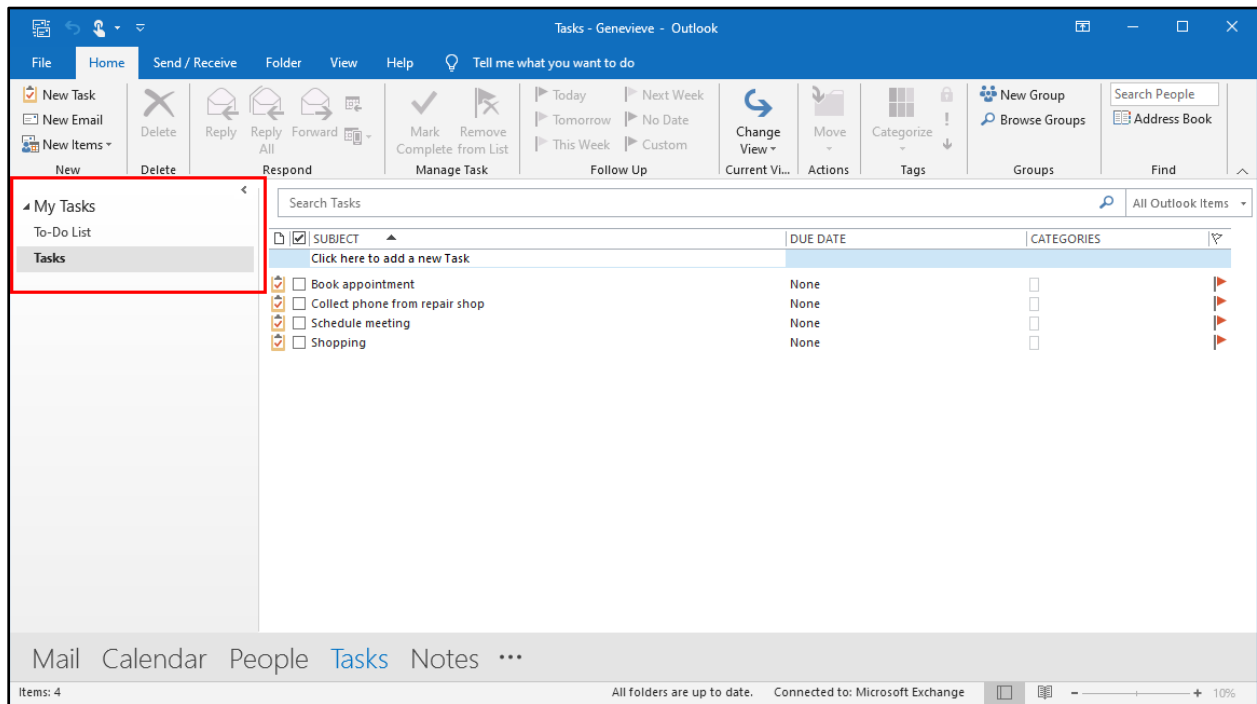
*Figure 2: The **To-Do List** and **Tasks** folders*

The **To-Do List** folder contains a structured list of your tasks and works very much like a checklist of tasks that you might typically write in a notepad. You can use the context menu to check off tasks easily once they are complete, which the following screenshot depicts:
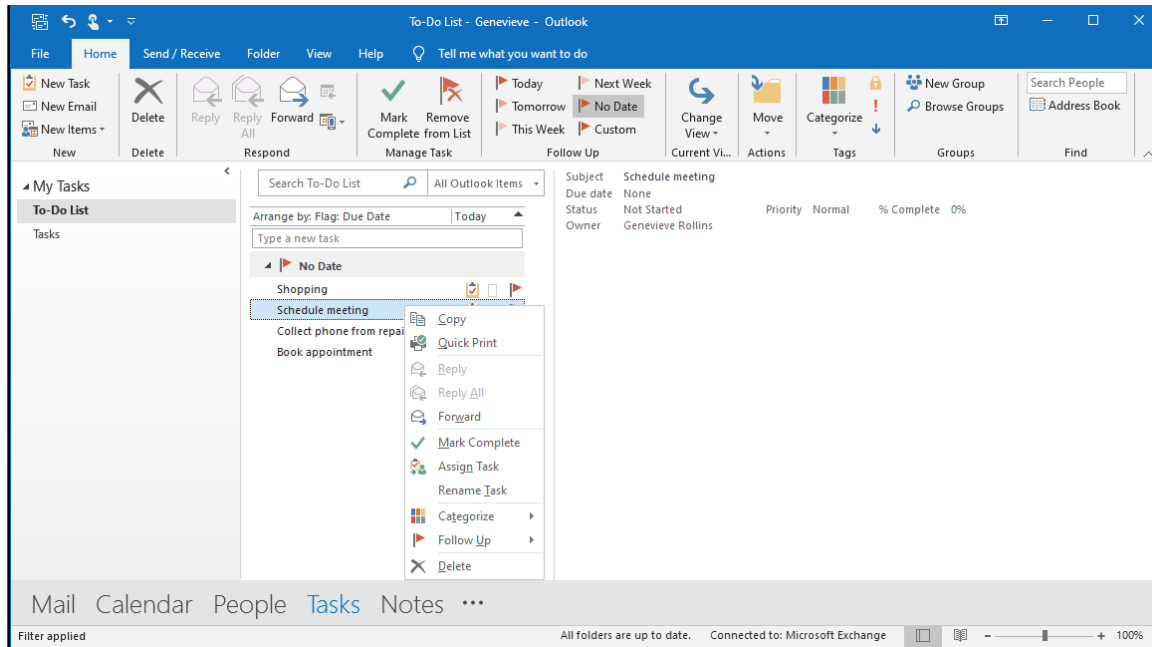
Figure 3: Modifying the properties of a task using the context menu

The **Tasks** folder contains a more generic list of your tasks. You can choose between a simple list or a detailed view, which the following screenshot depicts:
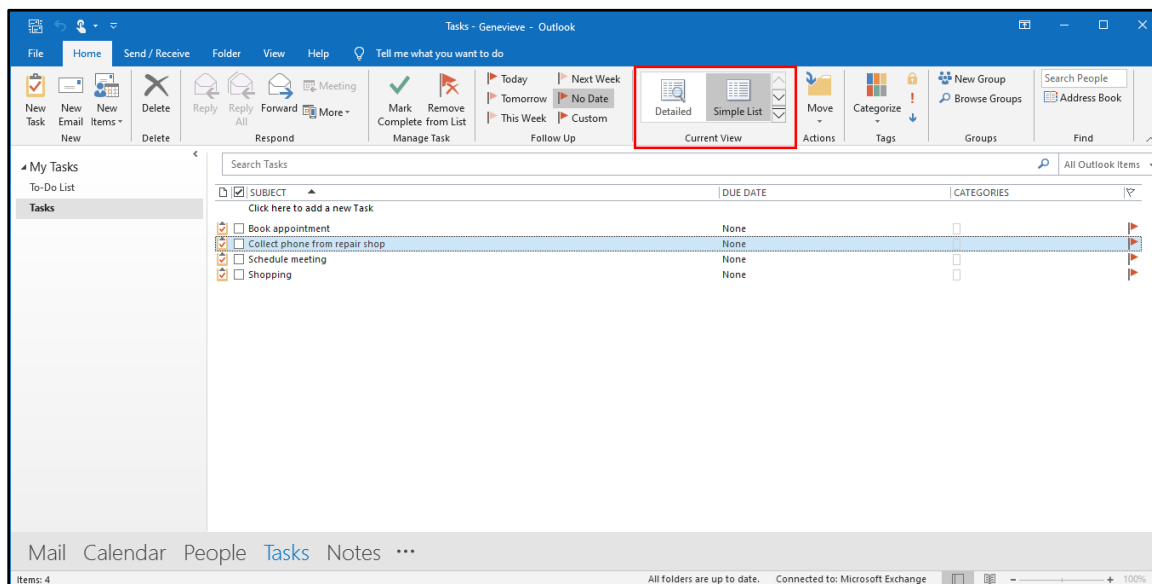
Figure 4: Selecting a suitable view for your tasks

You can create additional lists, or folders, under the **My Tasks** node.
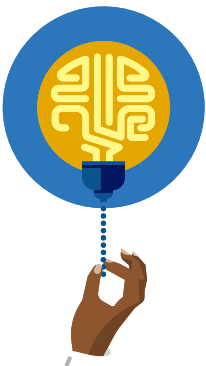
Microsoft

Did you know?

You can also download and install the Microsoft To Do app from the Microsoft Store. You can use this app to view and manage your tasks outside of Outlook.

The following screenshot depicts the **Tasks** pane in the Microsoft To Do app:
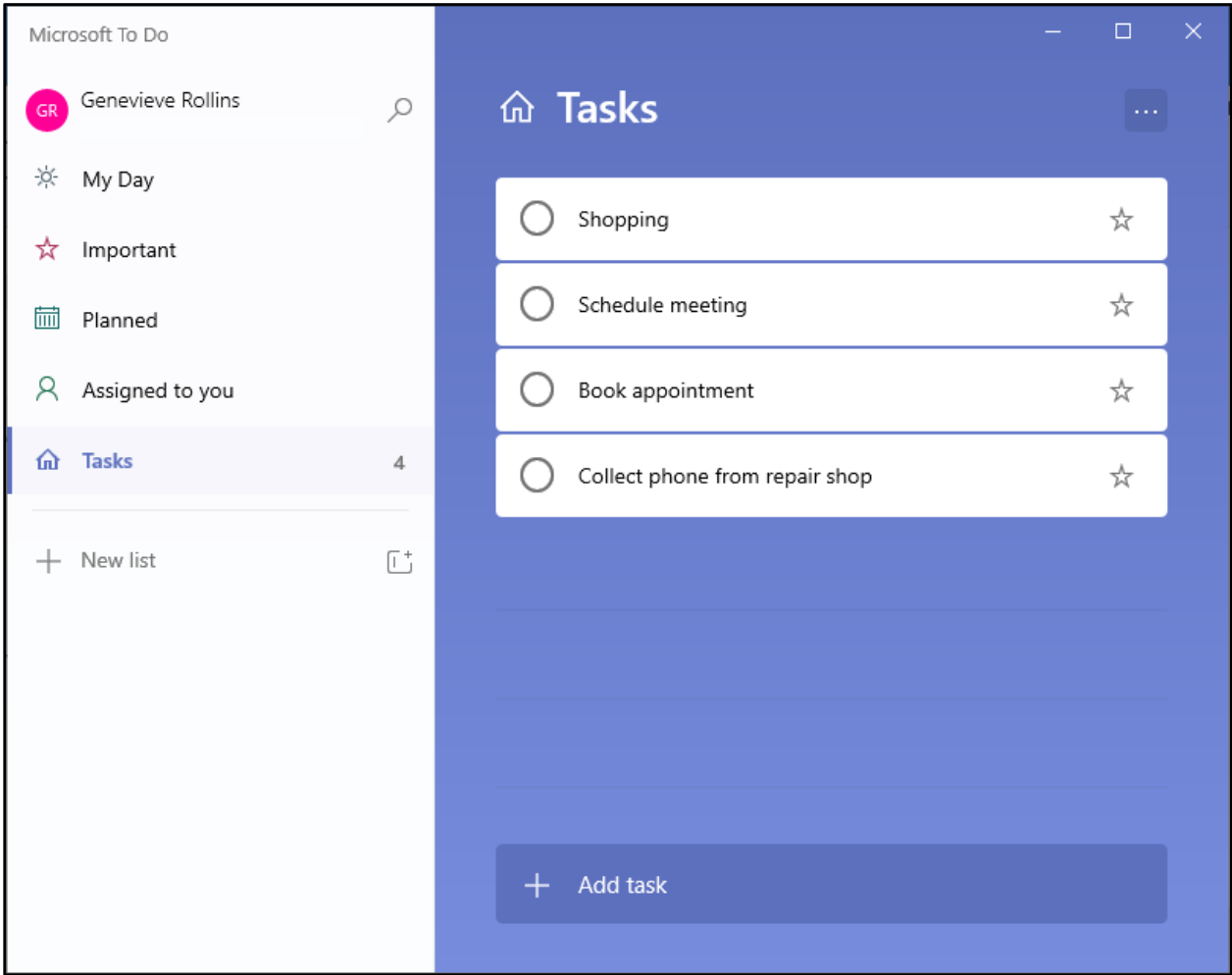
Figure 5: Viewing tasks by using the Microsoft To Do app

Microsoft

Additional information

The Outlook app for iOS and Android does not provide access to **Tasks**. However, versions of the Microsoft To Do app are available for your iOS or Android phone.

Create a task

To create a task, use the following procedure:

1. In Outlook, select the **Tasks** view.

2. In the **navigation** pane, select the **Tasks** folder.

3. On the ribbon, on the **Home** tab, in the **New** group, select **New Task**, which the following screenshot depicts:
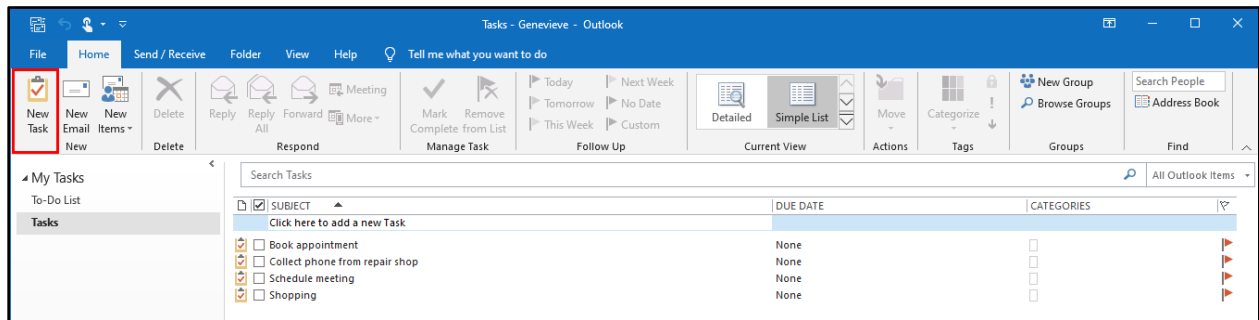
Figure 6: Creating a new task from the ribbon

4. In the **Untitled - Task** window, in the **Subject** text box, enter **Contact preserve jar sales team**.

5. Select the text box for the task and enter **Telephone the jam jar suppliers and order additional units**.

6. On the ribbon, select **Save & Close**, as the following screenshot depicts. Your task is now saved to the **Tasks** list.

Microsoft
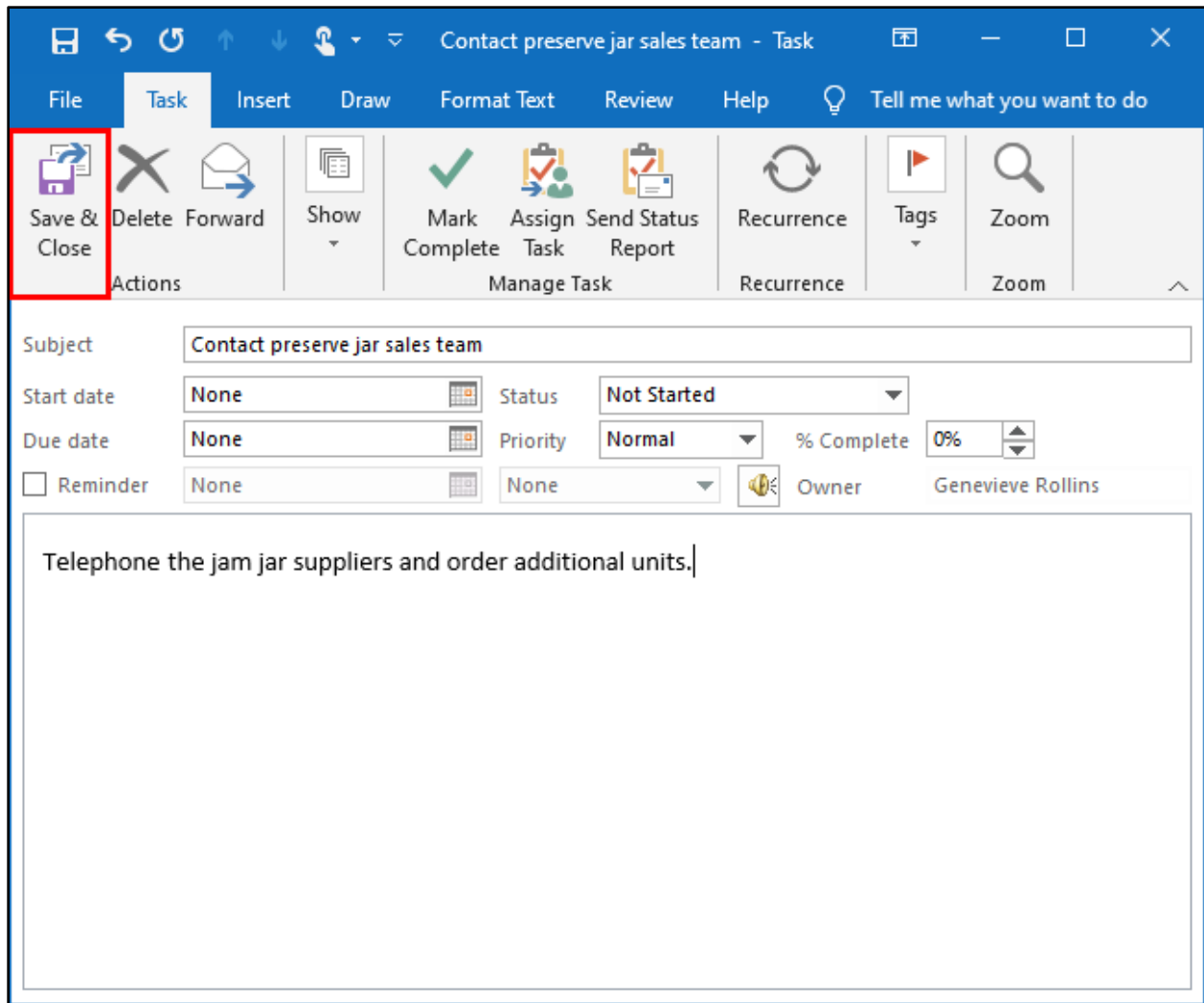
Figure 7: Configuring task details and saving a task

Create a task using a Follow Up flag

You can use a **Follow Up** flag to set start and end dates and a reminder on a task. Available options are to set a **Follow Up** flag for **Today**, **Tomorrow**, **This Week**, **Next Week**, or **Custom**. To create a task with a **Follow Up** flag set, use the following procedure:

1. In Outlook, select the **Tasks** view.

2. In the **navigation** pane, select the **Tasks** folder.

3. On the ribbon, on the **Home** tab, in the **New** group, select **New Task**.

4. In the **Untitled - Task** window, in the **Subject** text box, enter **Flagged task**.

5. Select the text box for the task, and enter **This task is flagged**.

6. On the ribbon, select **Tags**, select **Follow Up**, and then select **Custom**, which the following screenshot depicts:
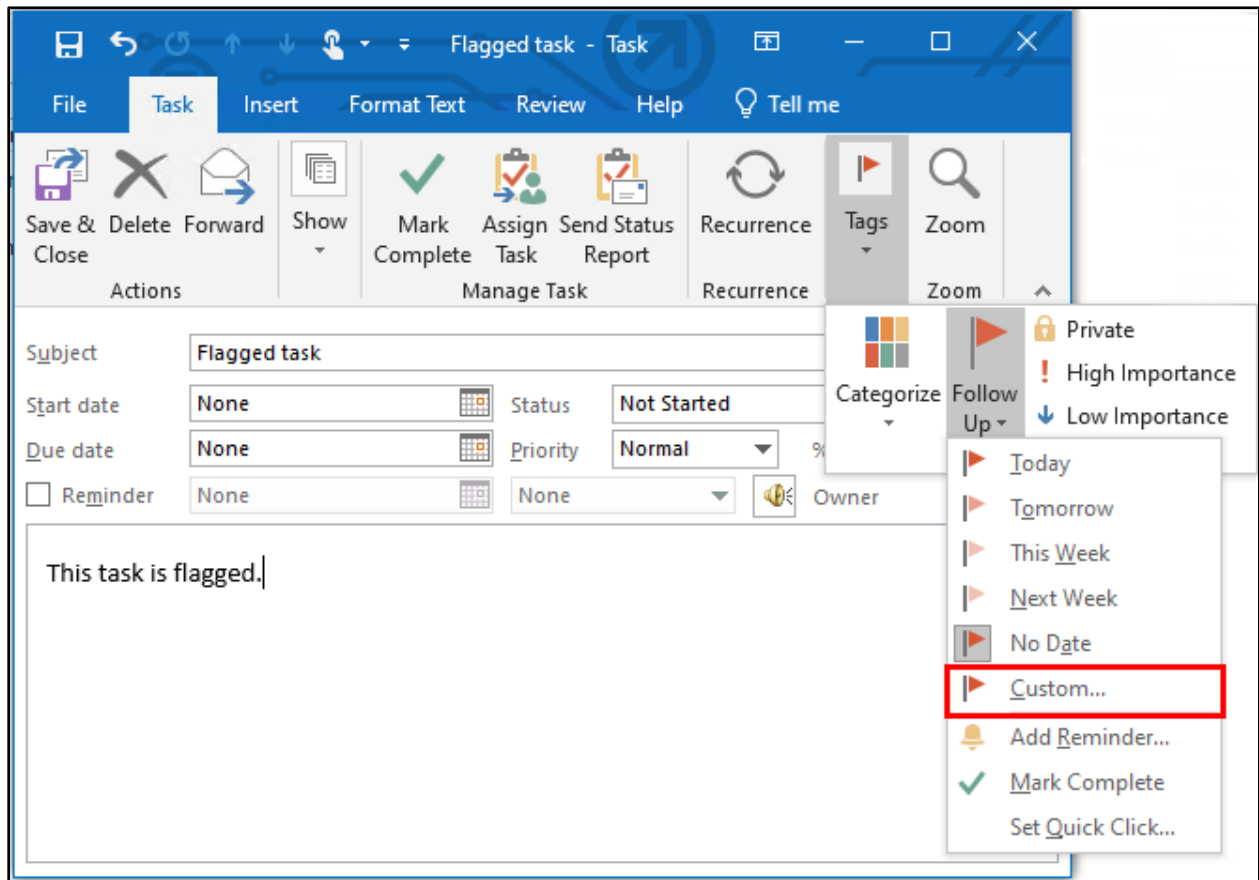
*Figure 8: Adding a custom **Follow Up** flag to a task*

7. In the **Custom** dialog box, in the **Flag to** list, you can choose between: **Call**, **Do not forward**, **Follow up**, **For Your Information**, **Forward**, **No Response Necessary**, **Read**, **Reply**, **Replay to All**, and **Review**.

8. In this case, select **For Your Information** and then set the **Start date** as two days from now.

9. Select the **Reminder** check box, set the reminder date for tomorrow at **16:00**, and then select **OK**, as the following screenshot depicts.

   Note: if your computer is configured to display time in a 12-hour clock format, then set the reminder for 4:00 PM.

*Figure 9: Configuring a custom **Follow Up** tag*

10. Verify the flag in the **Info Bar**, which is at the top of the **Flagged task - Task** window, and beneath the ribbon. The following screenshot depicts this flag:

*Figure 10: Verifying the **Follow Up** information with the summary*

11. Also notice that the task has been updated with details for **Start date**, **Due date**, and **Reminder** details, as the following screenshot depicts. These options should reflect the information you entered. On the ribbon, select **Save & Close**.

*Figure 11: Viewing the details of the **Follow Up** tag*

To set a **Follow Up** on an existing task, use the following procedure:

1. In the **Tasks** folder, in the list of tasks, right-click or access the context menu for the appropriate task. In this case, right-click or access the context menu for **Contact preserve jar sales team**, select **Follow Up**, and then select **Tomorrow**, as the following screenshot depicts:
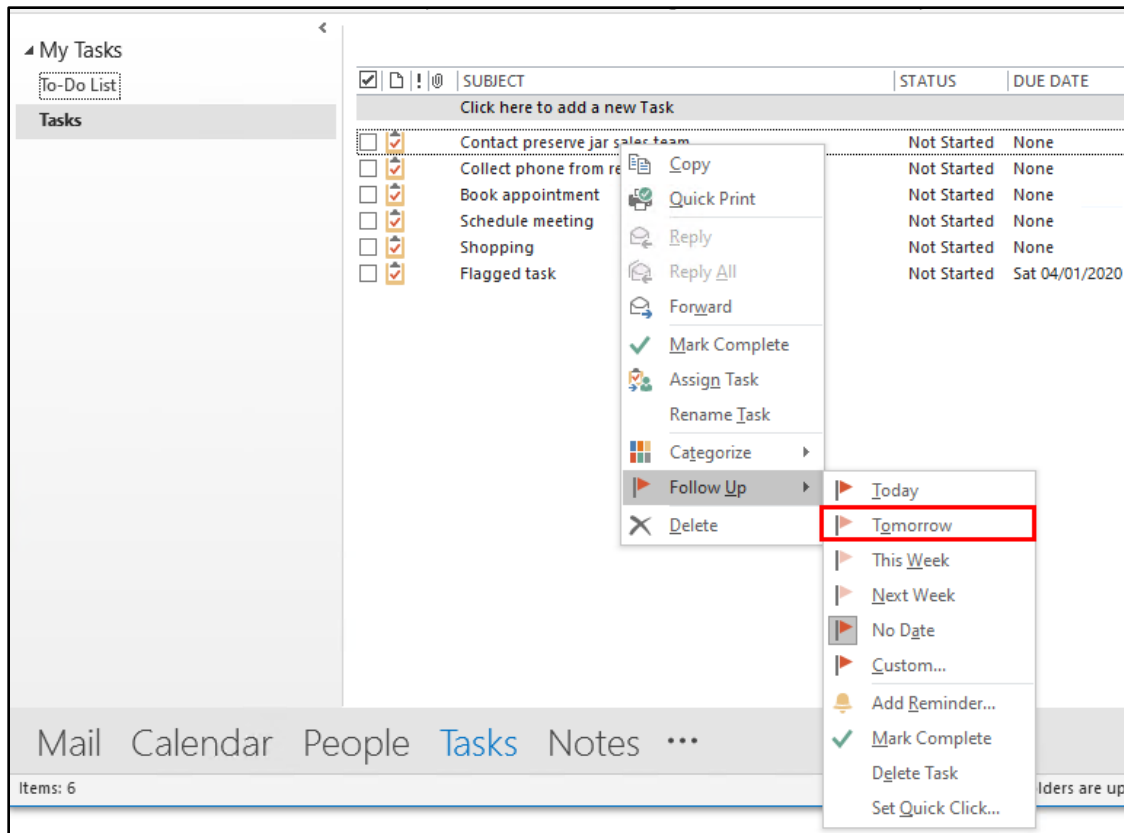
*Figure 12: Assigning a **Follow Up** tag for tomorrow*

2. Right-click or access the context menu for **Contact preserve jar sales team**, select **Follow Up**, and then select **Add Reminder**.

3. In the **Custom** dialog box, in the **Flag to** list, select **Call**, and then select **OK**, as the following screenshot depicts:
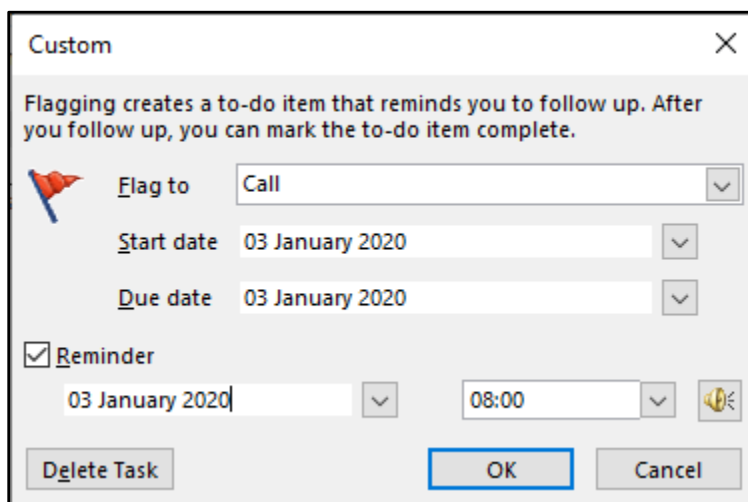
*Figure 13: Configuring a custom **Follow Up** tag*

What can you do with a task?

When you select a task in either the **To-Do List** or the **Tasks** list, you can perform several actions on the task. The actions are available on the context menu for a task and also on the **Home** tab of the ribbon, above your task list, as the following screenshot depicts:
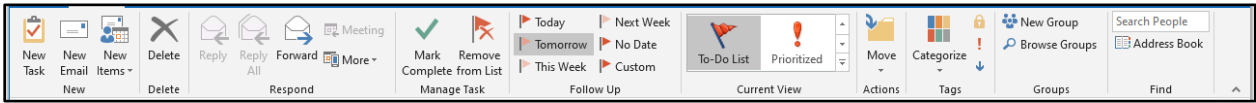
*Figure 14: The **Home** tab in tasks*

The following table describes the available actions.

Forward / Forward as an Attachment	You can forward a task to another person. This option opens a new email dialog box. You must then identify the recipient and complete the email text. Note that Outlook automatically assigns the label of the task's name to the **Subject** box.
Mark Complete	If you mark an item as complete, it will no longer display in the **To-Do List**. However, if you mark an item as complete when you are viewing tasks from the **Tasks** list, the text for the marked item displays with strikethrough formatting. If you mark a task as complete in error, immediately select Ctrl+Z to undo the operation. Otherwise, go to the **Tasks** list, select the completed task, and then select **Mark Complete**. This marks the item as not completed.
Remove from List	When you finish a task, you can remove it completely, both from the **To-Do List** and the **Tasks** list, by using the **Remove from List** option. Effectively, the task is deleted.
Follow Up	You can use this option to configure actions to perform on your task, such as assigning a start and end date, together with reminders.
Current View	You can use this option to change the current view in the selected list. You can also create and manage additional or existing views and customize them to your needs. We'll discuss views later in this module.

Microsoft

Move	Use this option to move a task between lists.
Tags	You can use this option to assign a category for the task, and to set the status of the task as **Private**, **High Importance**, or **Low Importance**.
Assign a Task	If you have a task that you would like someone else to perform, you can assign the task to them. This option is only available from the context menu. You will learn more details later in this module.

Table 2: Available task actions
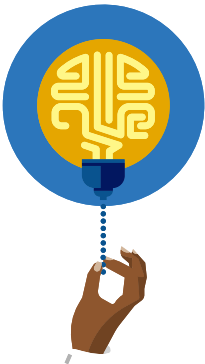
Did you know?

If you want to recover a deleted task item, you must recover it from the **Deleted Items** folder like any other deleted Outlook item. To do this, switch to **Folder** view, select **Deleted Items**, select the deleted task you want to recover, select **Move** on the ribbon, and then select the **Tasks** folder.

Create a task in the To-Do Bar

You can enable the **To-Do Bar** view from the **View** tab in Outlook. To enable and use the **To-Do Bar** to create a task, use the following procedure:

1. In Outlook, on the ribbon, select the **View** tab.

2. On the **View** tab, select **To-Do Bar**, and then select **Tasks**, as the following screenshot depicts. The **To-Do Bar** displays on the far right of the Outlook ribbon.
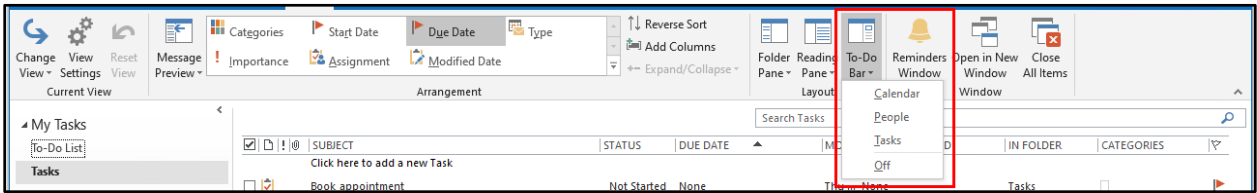
*Figure 15: Enabling the **To-Do Bar***

3. Right-click or access the context menu for the **To-Do Bar**, and then select **New Task**, as the following screenshot depicts:
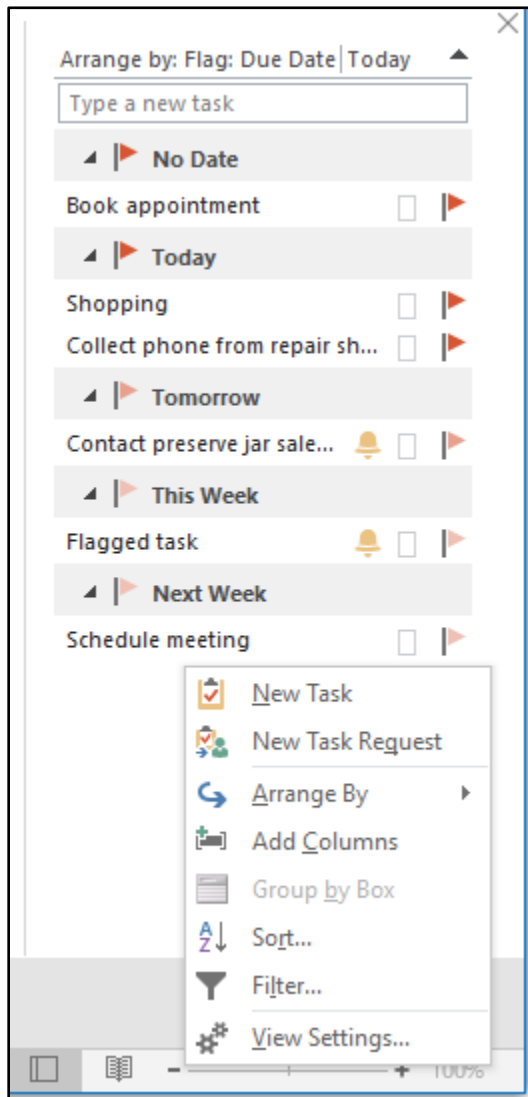
*Figure 16: The **To-Do Bar***

4. The **Untitled - Task** window displays. Complete the dialog box and then select **Save & Close**.

From within the **To-Do Bar**, you can reorganize your tasks by category, start date, due date, folder, type, and importance. To do this, at the top of the **To-Do Bar**, select **Arrange by**, and then select the appropriate option. For example, select **Due Date**, as the following screenshot depicts:

Microsoft
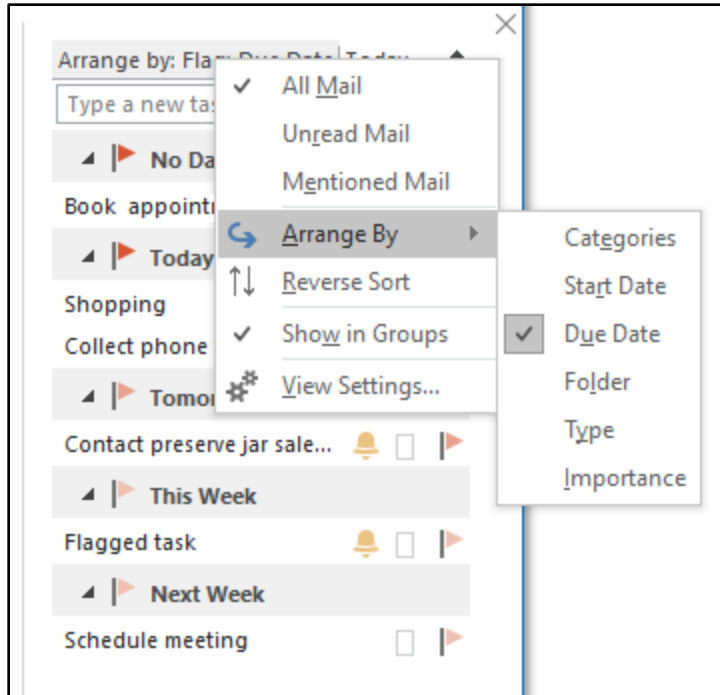
Figure 17: Rearranging tasks by due date

Add tags to the tasks

You can use tags to assign several properties to your tasks to help you filter, identify, or prioritize your tasks.

To assign tags, in the **Tasks** list, select the appropriate task, and then, on the ribbon, from the **Tags** group, select either **Categorize**, **Private**, **High Importance**, or **Low Importance**.

The following screenshot depicts how to assign tags:
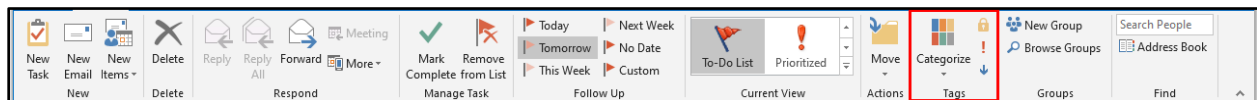
Figure 18: Tagging tasks

The following table describes the available tags.

Categorize	You can use this tag to allocate a category to a particular task. The same categories that you use in the Outlook **Calendar** feature are available here. Default categories are labeled by color; for example, blue, green, and so on. You can rename these defaults, and create additional categories as required. When you assign a category, the view for the task automatically updates with the color of that category in the tasks list.
Private	You can use this tag to prevent others from observing a particular task. Only you can observe the task properties.
High Importance	As with emails, you can mark a task as having high importance. Tasks marked this way appear with a red exclamation point in front of the task subject.
Low Importance	You can also mark tasks with a low importance. Tasks with low importance appear with a blue downward arrow before the task subject.

Table 3: Available task tags

Activity: Each one, teach one

In this activity, you'll work with a partner to research how to create tasks, and then teach each other what you've learned. Your teacher will guide the class through this activity.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Open Outlook.

2. Reach out to a classmate and form a pair.

3. Open **Help** in Outlook and search for topics on creating tasks.

4. Select a topic while your partner selects another topic.

5. Research the topic and teach each other what you've learned.

Try-it: Create and flag tasks

In this leveled try-it activity, you'll learn how to create tasks, and how to flag them.

Try-it 1

In this try-it, you'll create a task from the ribbon.

Resources

You will need the following resources for this try-it:

-   None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. If necessary, open Outlook 2019.

2. Switch to the **Tasks** view.

3. Create a new task from the ribbon.

4. In **Subject**, enter **Created from Ribbon** and, if desired, enter **Start date** and **Due date** information.

5. Assign the task **High Importance**.

6. Save the task.

Try-it 2

In this try-it, you'll create a task by using a keyboard shortcut.

Resources

You will need the following resources for this try-it:

-   None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. In Outlook, in **Tasks**, select Ctrl+N to create a new task.

2. In **Subject**, enter **Created from Shortcut** and, if desired, enter **Start date** and **Due date** information.

3. Assign the task the **Blue** category.

4. Save the task.

Additional information

For more information on creating tasks and to-do items, go to: [Create tasks and to-do items](#)

Topic 2: Update a task

As your workday evolves, you might need to update your tasks. In this topic, you'll learn how to do that quickly and easily.

Update a task

You can update a task from the **Tasks** list. Select your task from the **Tasks** view, which is located beneath the **My Tasks** node. Once you have selected your task, you can use the available options on the ribbon, or from the context menu for the task, to update it. Typical actions might include marking a task as complete, removing a task from a list, or assigning **Follow Up** or tags.

To perform more detailed changes, in your selected list view, use the following procedure:

1. Open the appropriate task.

2. In the **Task name - Task** window, on the **Task** tab, in the **Show** group, select **Task**, as the following screenshot depicts:
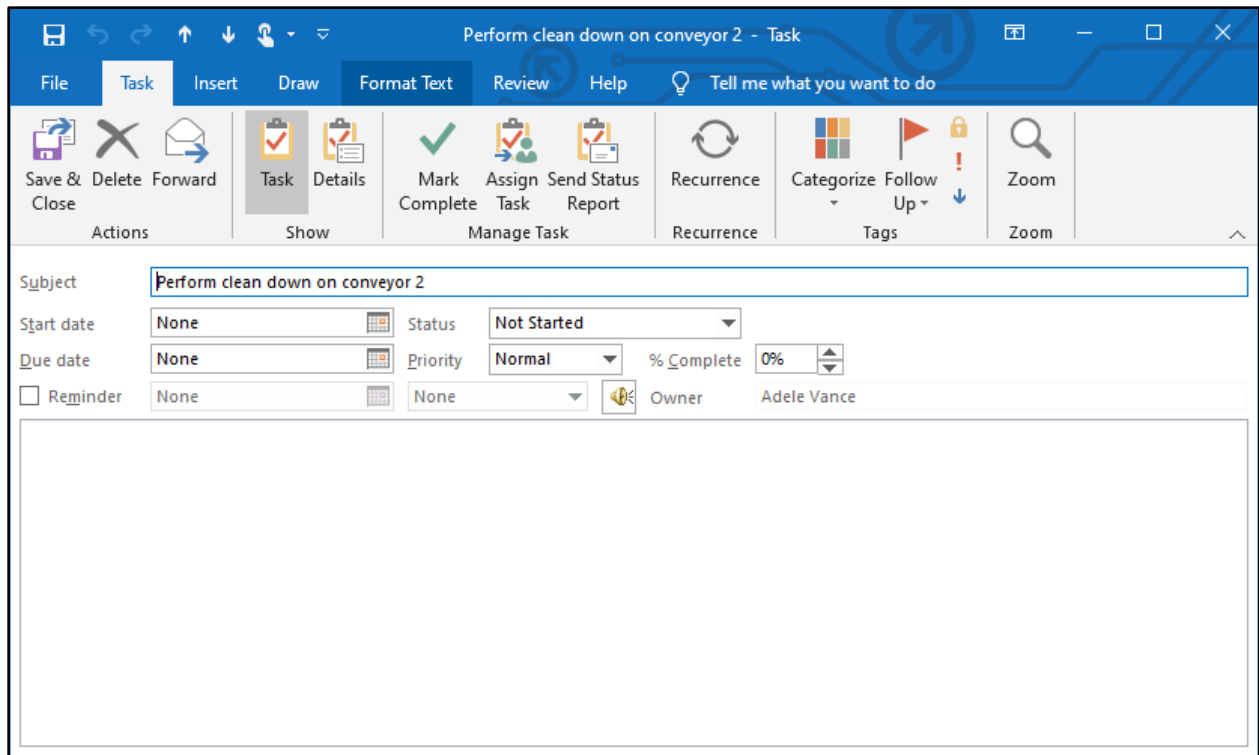
Figure 19: Viewing task information

3. You can change the following options:

   - **Subject**
   - **Start date**
   - **End date**
   - **Reminder** details
   - **Status** (choose from **Not Started**, **In Progress**, **Completed**, **Waiting on someone else**, and **Deferred**)
   - **Priority**
   - **% Complete**

4. On the ribbon, in the **Show** group, select **Details**, as the following screenshot depicts:
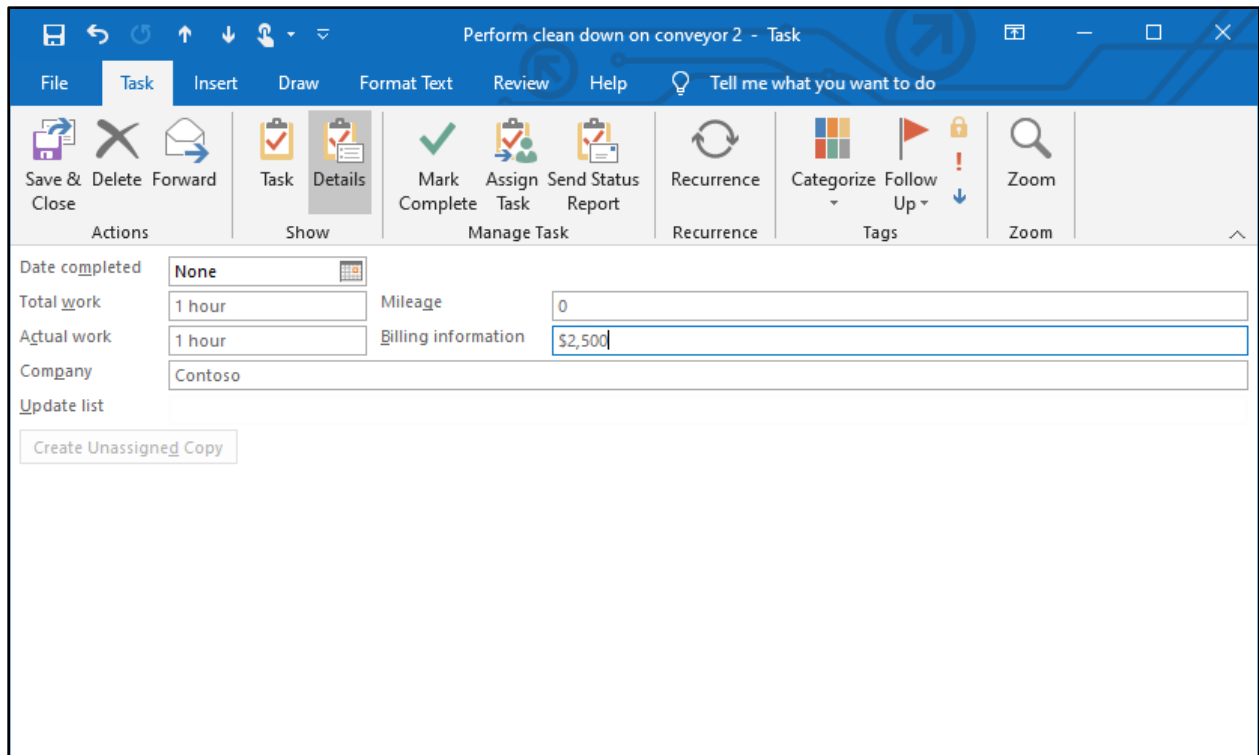
Figure 20: Viewing task details

5. You can change the following options:

   o **Date completed**
   o **Total work**
   o **Actual work**
   o **Company**
   o **Mileage**
   o **Billing information**

6. From the ribbon, you can also configure the following additional settings:

   o **Mark Complete**
   o **Assign Task**
   o **Send Status Report**
   o **Recurrence**
   o **Tags**

Activity: Think-pair-share

In this activity, your teacher will pose questions about updating tasks. Your teacher will guide the class through this activity, as you share your answers with classmates.

Microsoft

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Think about the answers to the questions your teacher asked.

2. Share your answers with a neighboring classmate and discuss answers with them.

Try-it: Update a task

In this standalone try-it activity, you'll update a task.

Resources

You will need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. In Outlook, in **Tasks**, open the **Created from ribbon** task you created earlier.

2. Modify the **Status** and **%Complete** values to indicate progress on the task, but do not mark it complete.

3. Save the task.

4. From the ribbon, mark the task as complete.

Topic 3: Observe and print tasks

Often, if you have many tasks, changing the current list's view can help you easily know what's urgent, and what can wait. It can also be very handy to have a printed copy of all your current tasks, or the details for a specific task. In this topic, you'll learn how to create and change task views, and how to print tasks.

Change views by using the Current View options on the Home tab

Once you start using tasks in your workplace, you might find you have an increasing number to manage. Using the appropriate view can help you more effectively manage your tasks. To change your current task view, from the **Home** tab on the ribbon, in the **Current View** group, select **Change View**. You can choose between **Detailed**, **Simple List**, **To-Do List**, **Prioritized**, **Active**, **Completed**, **Today**, **Next 7 Days**, **Overdue**, **Assigned**, and **Server Tasks**, as the following screenshot depicts:
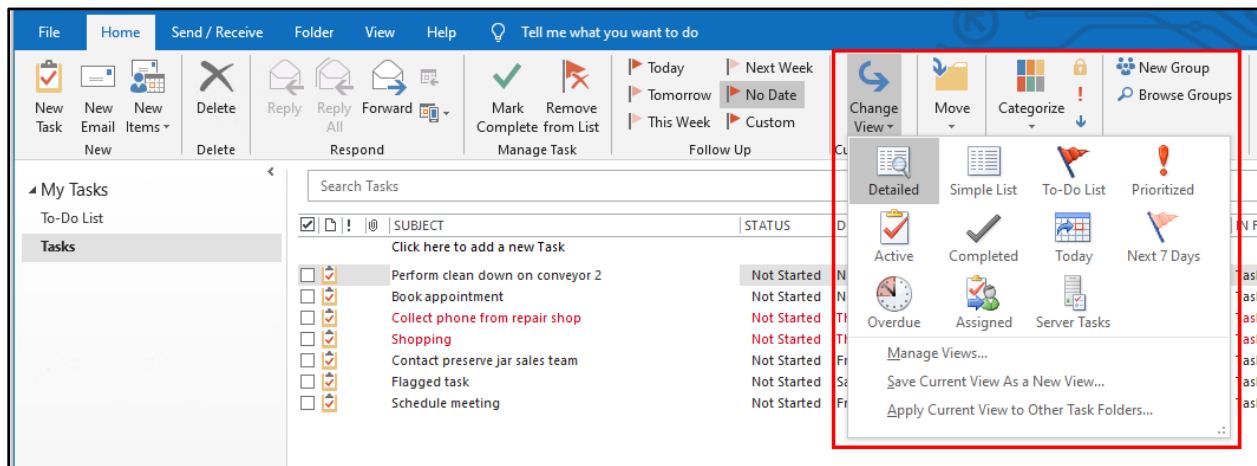
Figure 21: Changing the task view

In addition to the list of available views, you can also select **Manage Views**, **Save Current View As a New View**, and **Apply Current View to Other Task Folders**.

To create a new view, use the following procedure:

1. Select **Manage Views**.

2. Review the existing views in the **Manage All Views** dialog box, as the following screenshot depicts:
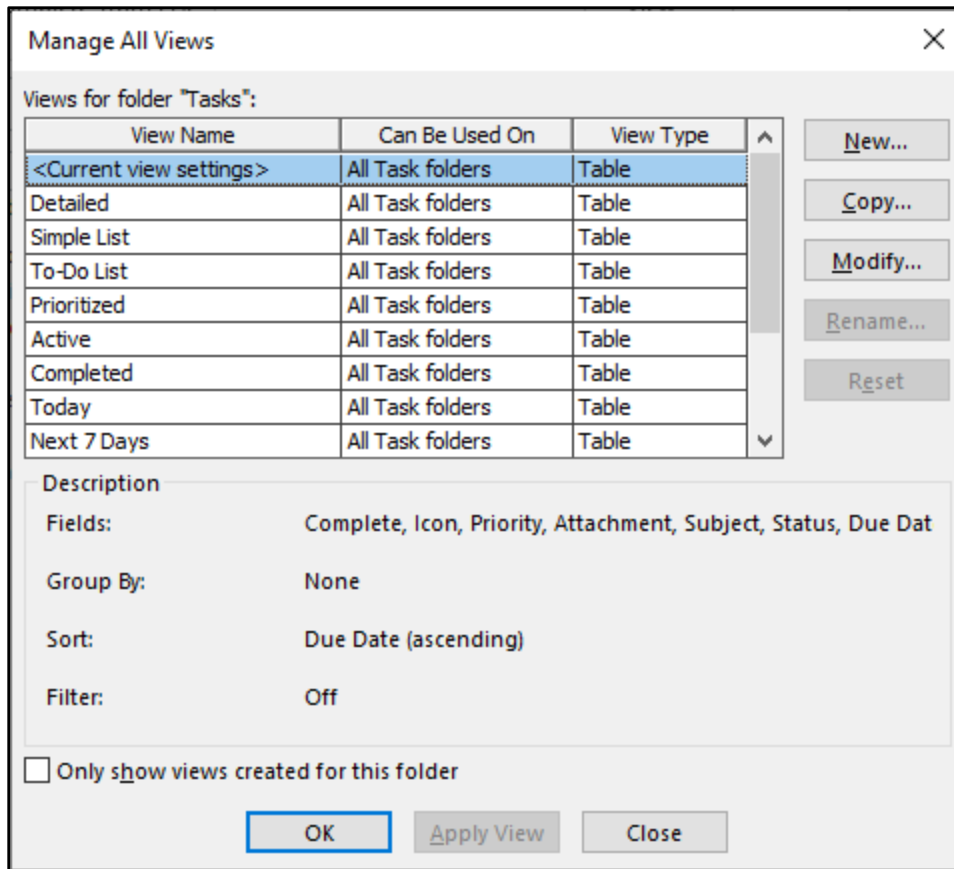
Figure 22: Modifying default views

3. To create a new view, select **New**.

4. In the **Create a New View** dialog box, depicted in the following screenshot, in the **Name of new view** box, enter a name, and then select the type of view. You can choose **Table**, **Timeline**, **Card**, **Business Card**, **People**, **Day/Week/Month**, and **Icon**. You can also select whether the view is available on this folder only or on all folders, and whether the view displays only to you, or to everyone. When you have selected the appropriate settings, select **OK**.
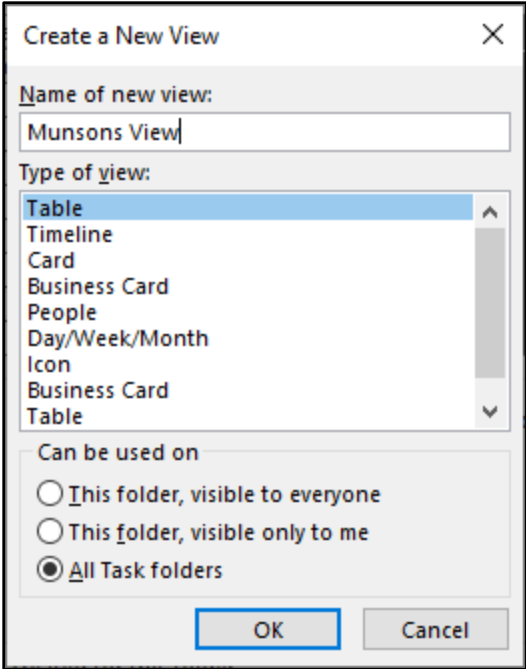
Figure 23: Creating a new custom view

5. In the **Advanced View Settings: view name** dialog box, you can define several formatting options, including **Columns**, **Group By**, **Sort**, and **Filter**, which the following screenshot depicts:
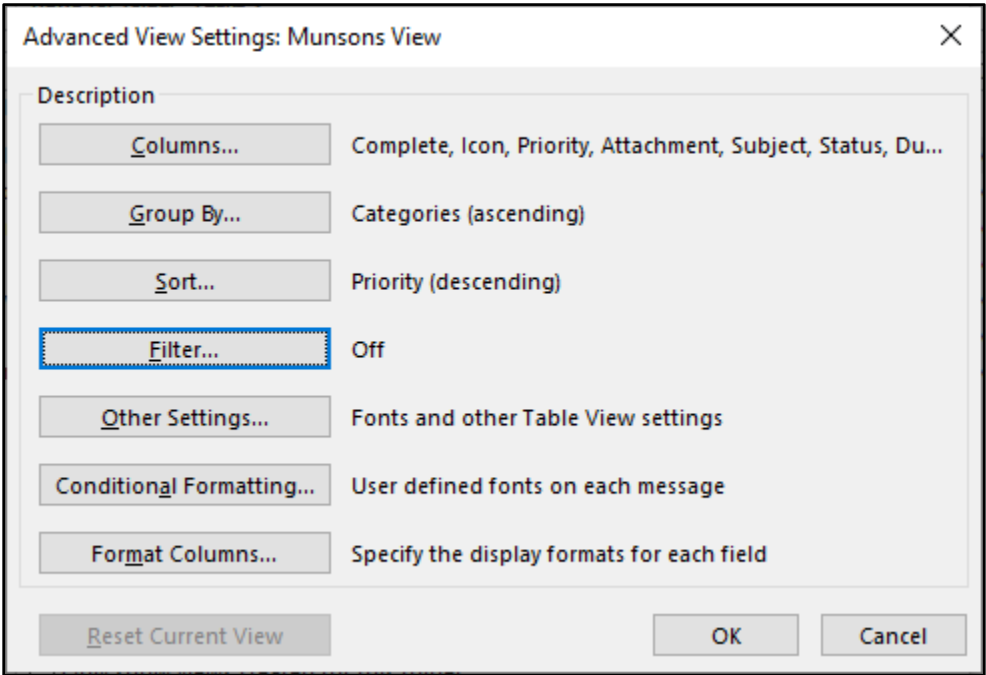
Figure 24: Configuring advanced view settings

6. When you finish updating your view settings, select **OK** twice.

7. To assign the view, from the ribbon, select **Change View**, and then select the new view.

Print a task

To print all your current tasks as a list, select the appropriate view, and then use the following procedure:

1. On the ribbon, select the **File** tab.

2. Select **Print**.

3. On the **Print** page, select **Table Style**, as the following screenshot depicts:
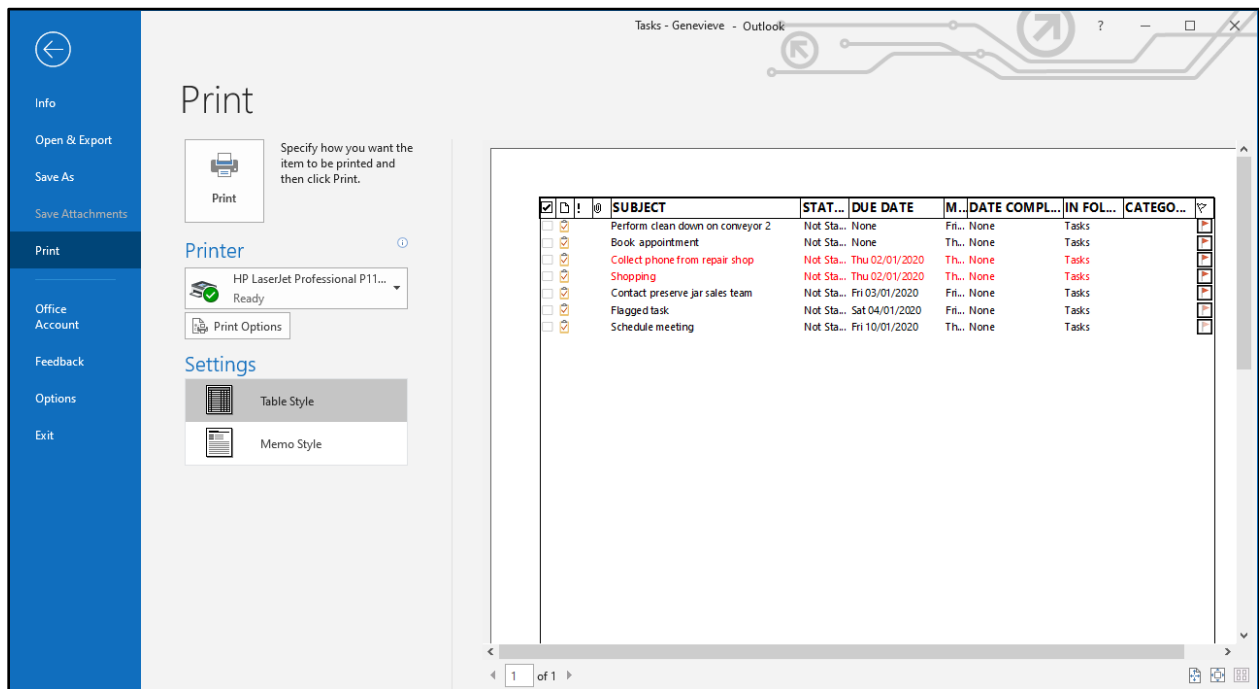
*Figure 25: Printing a list of tasks using **Table Style***

4. If necessary, select the appropriate printer from the **Printer** list.

5. Select **Print**.

If you want to print the detail for a specific task, or tasks, use the following procedure:

1. In the appropriate tasks list, select the item(s) you want to print.

2. On the ribbon, select the **File** tab.

3. Select **Print**.

4. On the **Print** page, select **Memo Style**, as the following screenshot depicts:
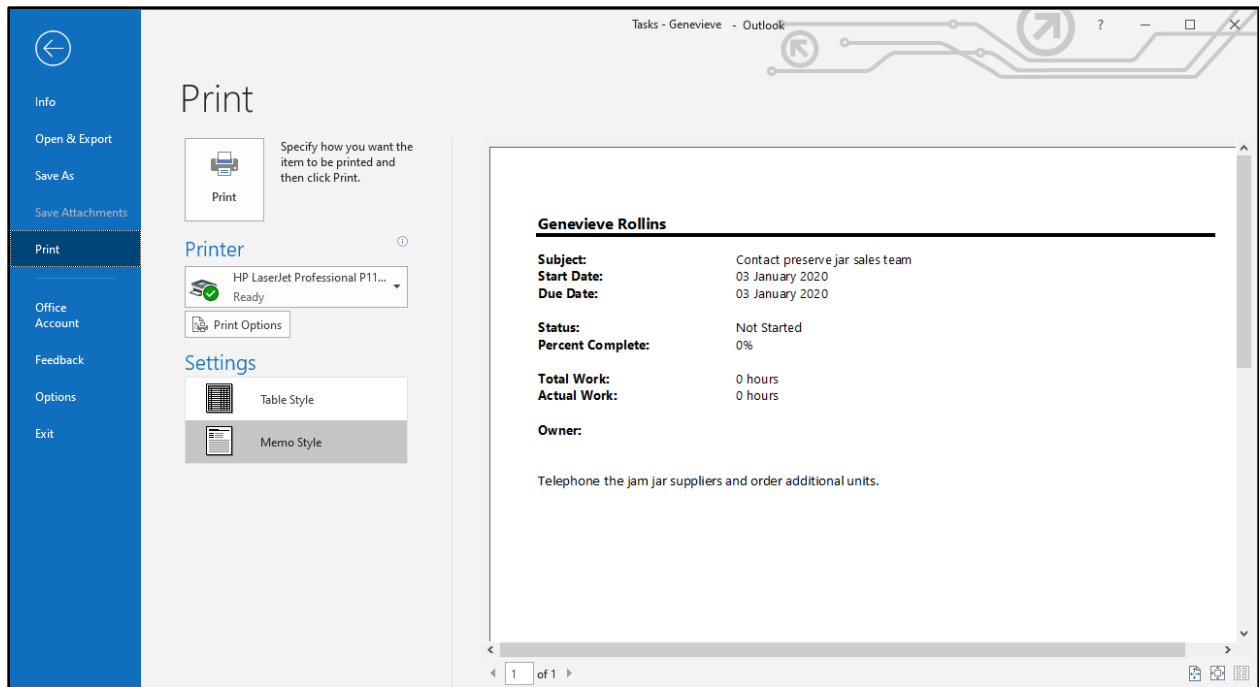
*Figure 26: Printing a specific task in **Memo Style***

5. If necessary, select the appropriate printer from the **Printer** list.

6. Select **Print**.

Activity: Show and tell

In this activity, your teacher will demonstrate how to create, observe, and print tasks. Follow along and ask your teacher if you have any questions.

Resources required

You will need the following resources for this activity:

- Ideally, your computer is configured with a **Microsoft Print to PDF** printer. If not, you can use any local printer to preview the settings.

Activity instructions

Follow along with your classmates as your teacher helps you to:

1. If necessary, open Outlook.

2. Select **Tasks**.

3. In **Tasks**, select the **Tasks** folder.

4. On the ribbon, on the **Home** tab, in the **New** group, select **New Task**.

5. In the **Untitled - Task** window, in the **Subject** text box, enter **Demonstration task**.

6. In the body text, enter **This is a demonstration task**.

7. On the ribbon, select **High Importance**, and then select **Save & Close**.

8. Create two additional tasks named **Second Demonstration task** and **Third demonstration task**.

9. Assign **Low Importance** to the second task and save and close both.

10. On the ribbon, select **Change View** and then select **Prioritized**. Notice that tasks are grouped by importance.

11. Select **Change View** and then select **Simple List**.

12. Highlight all three tasks, and then select the **File** tab on the ribbon.

13. Select **Print**.

14. Ensure that the **Printer** is set to **Microsoft Print to PDF**. If that's not available, choose any other available printer for this demonstration.

15. In the **Settings** area, select **Table Style**.

16. Zoom in to the preview area.

17. In the **Settings** area, select **Memo Style**.

18. In the **Preview** area, select **Preview** and then go through each page.

19. You do not need to print anything. Select **Back** to return to **Tasks**.

Try-it: Observe and print tasks

In this standalone try-it activity, you'll change task views and use print preview.

Resources

You will need the following resources for this try-it:

- Your computer should have **Microsoft Print to PDF** as a printer option. If not, choose another local printer, or else just skip the printing step.

Instructions

The following are the general tasks that you need to perform during this try-it:

1. In Outlook, create a new task.

2. In the **Subject** box, enter **Test Print**.

3. Enter **Start date** and **Due date** information.

4. Save the task and close it.

Microsoft

5. From the **Tasks** list, open your newly created task.

6. On the ribbon, go to **File**, and then select **Print**. You can observe a preview on the right side of the display.

7. If, under **Printer**, **Microsoft Print to PDF** is available, print the task and save the PDF file to your desktop with the same name as your task.

8. Close the task.

9. On the ribbon, go to **Tasks**, and select **Change View** to explore the available options. Try a few different views, and then return to the default view.

Additional information

For more information on creating and printing Outlook items, visit:
[Print contacts, messages, or other Outlook items](#)

Wrap-up

Use these questions to check what you learned in this lesson:

1. In which view do completed tasks not display by default?

   Select the correct option.

   a. **To-Do List**

   b. **Tasks**

2. If you want to set a **Follow Up** flag, which button must you select in an open task?

   Select the correct option.

   a. **Follow Up**

   b. **Tags**

   c. **Reminder**

   d. **Flag**

3. If you set a **Follow Up** for tomorrow, then **Tasks** _____ automatically create a reminder.

   Fill in the blank space.

4. If you want to indicate that a task is underway, you must set the
   _____ property for the task.

Fill in the blank space.

Lesson 2: Using task assignments

Overview

You've now learned how to create and manage tasks. One of the more useful features of tasks in Outlook is the ability to assign tasks to other individuals. In this lesson, you'll learn how to assign a task, and accept and update a task that's been assigned to you.

Warm-up

In the previous lesson you learned how to create and edit tasks. In this lesson you will learn how to use task assignments. Use these questions to find out what you already know about this lesson's topics:

1. When you assign a task, at what stage can you request a status report?

   Select the correct option.

   a. The task is edited

   b. The task is completed

   c. The task is deleted

   d. All of the above

2. When you accept a task, you can choose between which two options?

   Select the correct two options.

   a. Send the response now

   b. Delete owner's copy of task

   c. Edit the response before sending

   d. Send status report

3. You can assign a task to anyone for whom you have _____.

   Fill in the blank space.

4. Assigned tasks arrive as _____

   Fill in the blank space.

Topic 1: Assign a task

📍It's quite likely that you'll want to assign a task to someone else within your organization. Fortunately, with **Tasks** in Outlook, this process is straightforward, and it uses the email and contacts capabilities of Outlook.

Assign a task

To assign a task, use the following procedure:

1. Select the appropriate task view and then locate the task you want to assign.

2. Right-click or access the context menu for the task, and then select **Assign Task**.

3. Go to the **Task name - Task** window, select the **To text** box, and enter the email address of the recipient of your task, as the following screenshot depicts. Alternatively, select **To** and browse and locate the recipient's name from an address list, if available.

Figure 27: Assigning a task

4. Configure any additional properties, such as categories and tags.

5. Select **Send**.

The person to whom you have assigned a task must now respond to the assignment. The next topic examines that process in more detail.
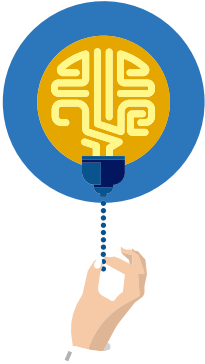
Did you know?

You can choose to keep an updated copy of the assigned task in your own tasks list. This option is enabled by default. Additionally, you can request a status report when the task has been completed; this option is also enabled by default.

Review assignment options and use tags on assignments

You can review task properties after you assign and accept a task. To view assignment options, locate the task that you assigned in your list of tasks and open it. The following screenshot depicts a task window.
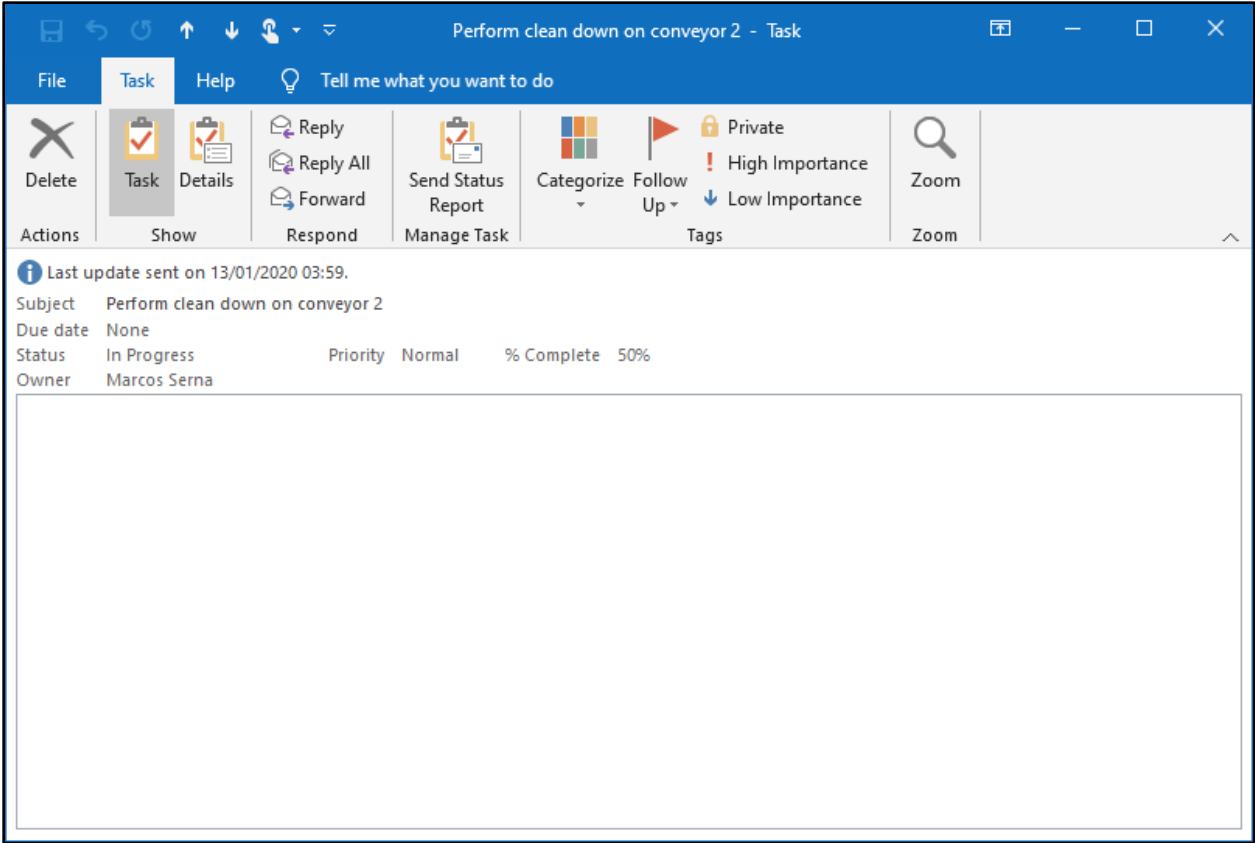
Figure 28: Viewing an assigned task

From the **Task Name - Task** window, you can observe and update the following properties.

Show	Select the **Task** button to observe a summary of the status of the task. Select the **Details** button to view more detailed status, including hours spent, company, mileage, and billing information.
Manage Task	Select **Send Status Report** to generate an email message that sends the current details of the task to a designated recipient.

Tags	You can use **Tags** on assignments in the same way that you can on any other task. Select the task you want to modify, and then, using the ribbon or context menu, configure tags such as categories, privacy, and importance. You can assign these values when you create a task. Alternatively, you or the person to whom you assigned the task, can assign these values later.

Table 4: Configurable task properties

Activity: Pose a challenge

In this activity, your teacher will present a scenario and ask for your help in assigning some tasks. Think of different ways in which you can assign and manage tasks and help your teacher.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

- Engage in the discussion and activity with the teacher.

- Ask and answer any questions.

Try-it: Assign a task

In this leveled try-it activity, you'll learn how to assign tasks.

Try-it 1

In this try-it, you'll assign a task using the Task card.

Resources

You will need the following resources for this try-it:

- An email address. You will only be able to assign a task properly if you have email accounts for other students or your teacher.

Instructions

The following are the general tasks that you need to perform during this try-it:

1. In Outlook, go to **Tasks**, and create a new task called **Assigned Task**.

2. Right-click or access the context menu for **Assigned Task**, and then select **Assign Task**.

3. Enter your partner or teacher's email address, as instructed.

4. Keep an updated copy of the task on your task list, so that you receive a status report upon completion.

5. Send the email task assignment.

Try-it 2

In this try-it, you'll assign a task using the Task card and flag it for **Follow Up**.

Resources

You will need the following resources for this try-it:

- An email address. You will only be able to assign a task properly if you have email accounts for other students or your teacher.

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Create a new task called **Second Assigned Task**. Save the task and then select it.

2. On the ribbon, select **Assign Task**.

3. Enter your partner or teacher's email address, as instructed.

4. Keep an updated copy of the task on your task list, so that you receive a status report upon completion.

5. On the ribbon, select **Follow Up**, and then configure a **Follow Up** for this time next week.

6. Send the email task assignment.

Try-it 3

In this try-it, you'll assign a task using the Task card and mark it with importance.

Microsoft

Resources

You will need the following resources for this try-it:

- An email address. You will only be able to assign a task properly if you have email accounts for other students or your teacher.

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Create a third task called **Third Assigned Task**.

2. On the ribbon, select **Assign Task**.

3. Enter your partner or teacher's email address, as instructed.

4. Keep an updated copy of the task on your task list, so that you receive a status report upon completion.

5. On the ribbon, set the **High Importance** tag.

6. Send the email task assignment.

Additional information

For more information on assigning and tracking tasks, visit: Assign and track tasks

Topic 2: Accept and update a task

If somebody assigns you a task, you must know how to accept the task, and then, as you proceed through the assignment, how to update the task. It's also important that you understand how to notify the task owner of any change in the task's status.

Accept a task

When someone assigns you a task, you will receive an email notification. To observe this notification, switch to **Mail** view and then locate the message with the subject that begins with **Task Request**, as the following screenshot depicts:

Microsoft
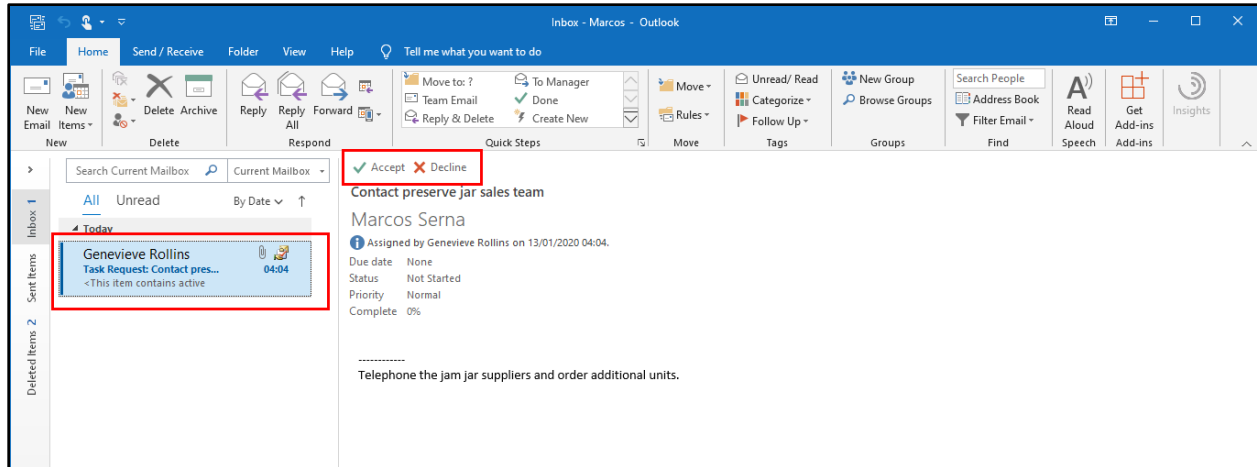
Figure 29: Accepting a task and viewing the email assignment

If you don't wish to accept the task, select **Decline** in the message body. If you wish to accept the task, select **Accept**. In both cases, you are prompted to edit a response before sending it, as the following screenshot depicts:
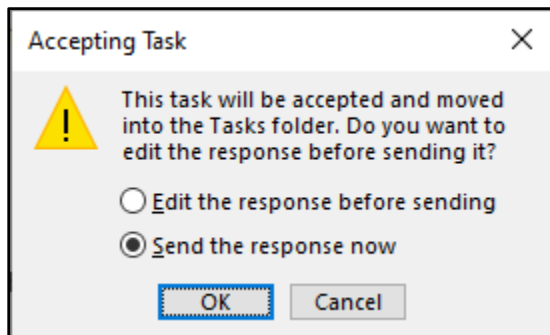
Figure 30: Accepting a task assignment

If you choose to edit the response, an email window will open, as the following screenshot depicts. Add any text to the response, configure any options, such as start and due dates, and then select **Send**.

Microsoft

43
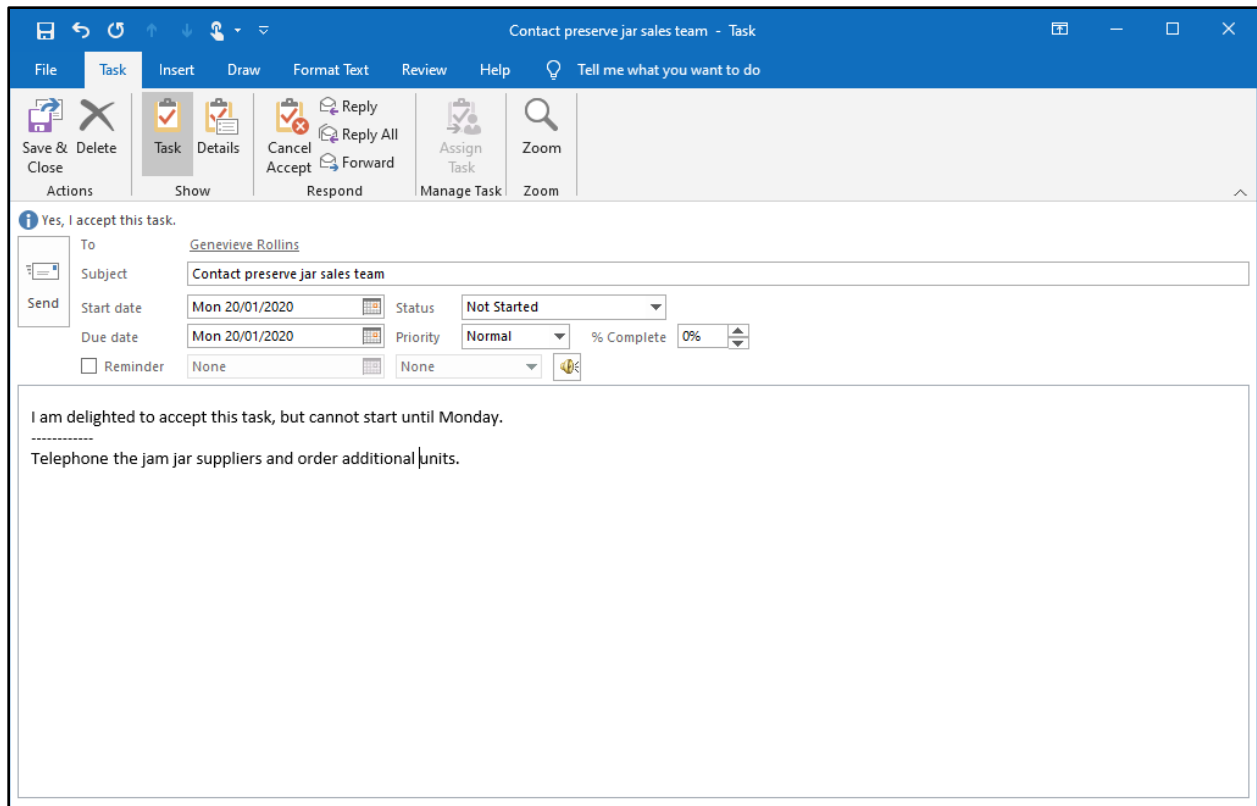
Figure 31: Editing the task assignment response email

If you switch to your **Tasks** view, the task is listed.

Update task progress

Whenever you update a task that someone has assigned to you, the status automatically updates in all copies of the task, including the copy of the person who assigned it. To update any assigned task, simply open the task and make the necessary changes, as with your own tasks. When you complete a task, the task owner receives an email message confirming this, as the following screenshot depicts:
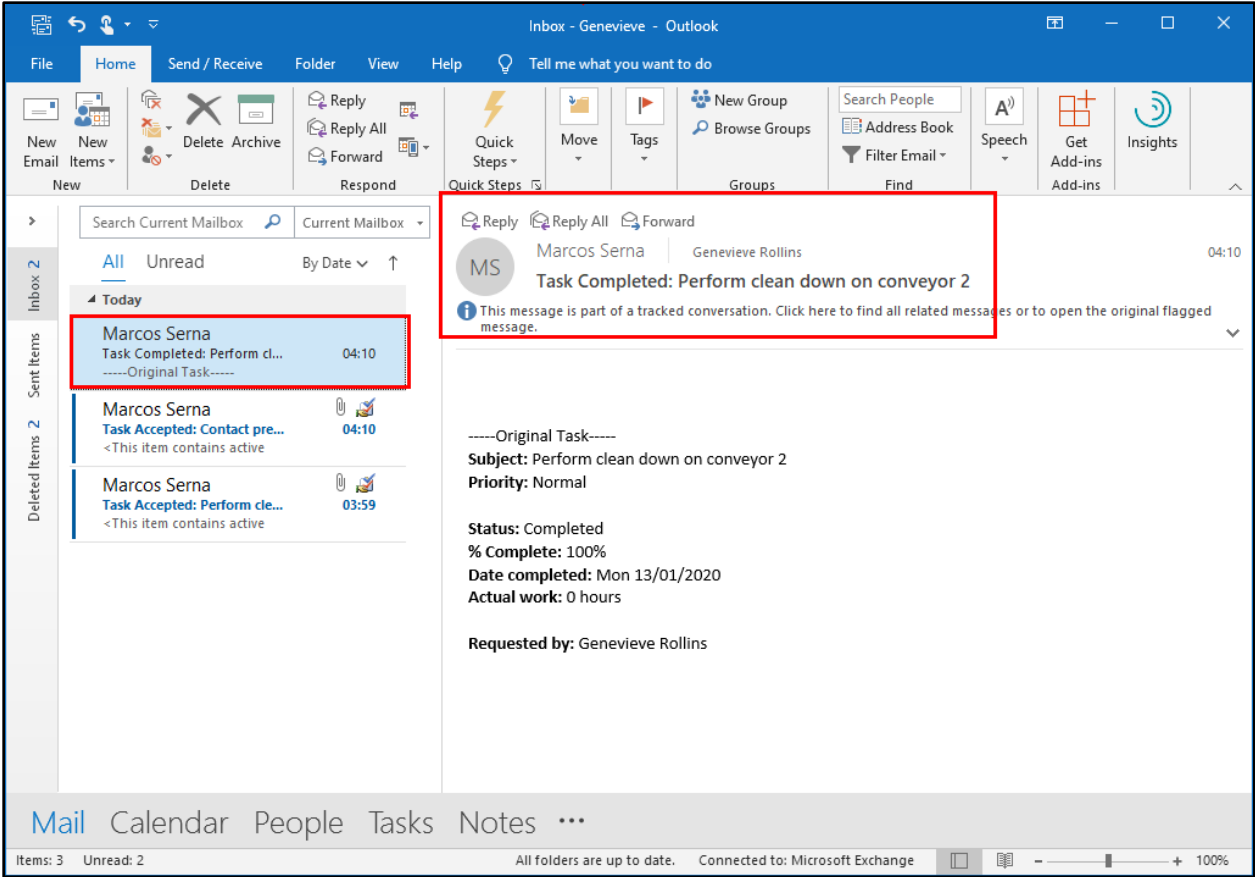
Figure 32: Viewing the Task Completed email for an assigned task

In addition, the task is marked as complete in the task owner's **Tasks** list, as depicted in the following screenshot.
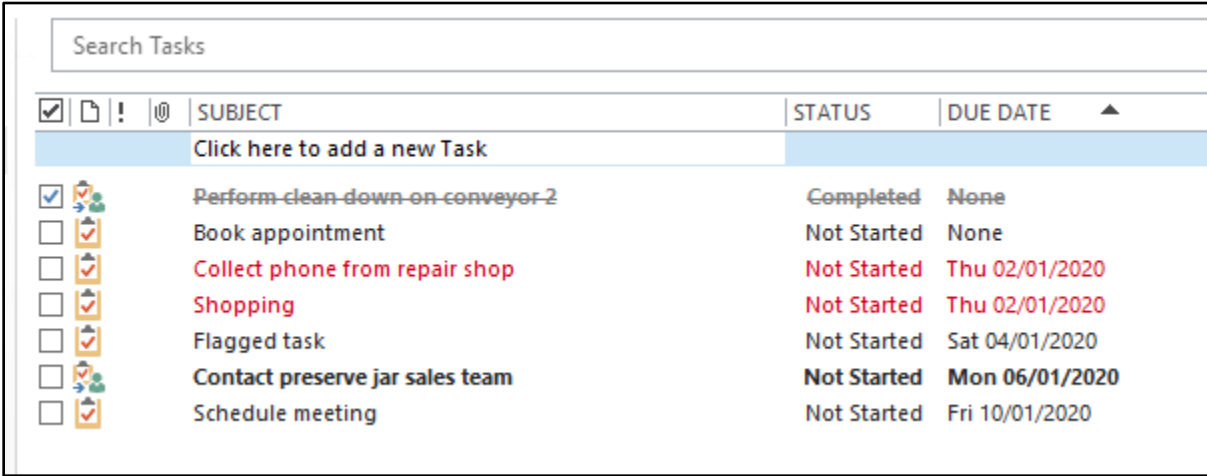
Figure 33: Viewing completed tasks

Send a status report

You can send a status report for any assigned task (or unassigned task). To do this, open the task properties, and select **Send Status Report**, as the following screenshot depicts:
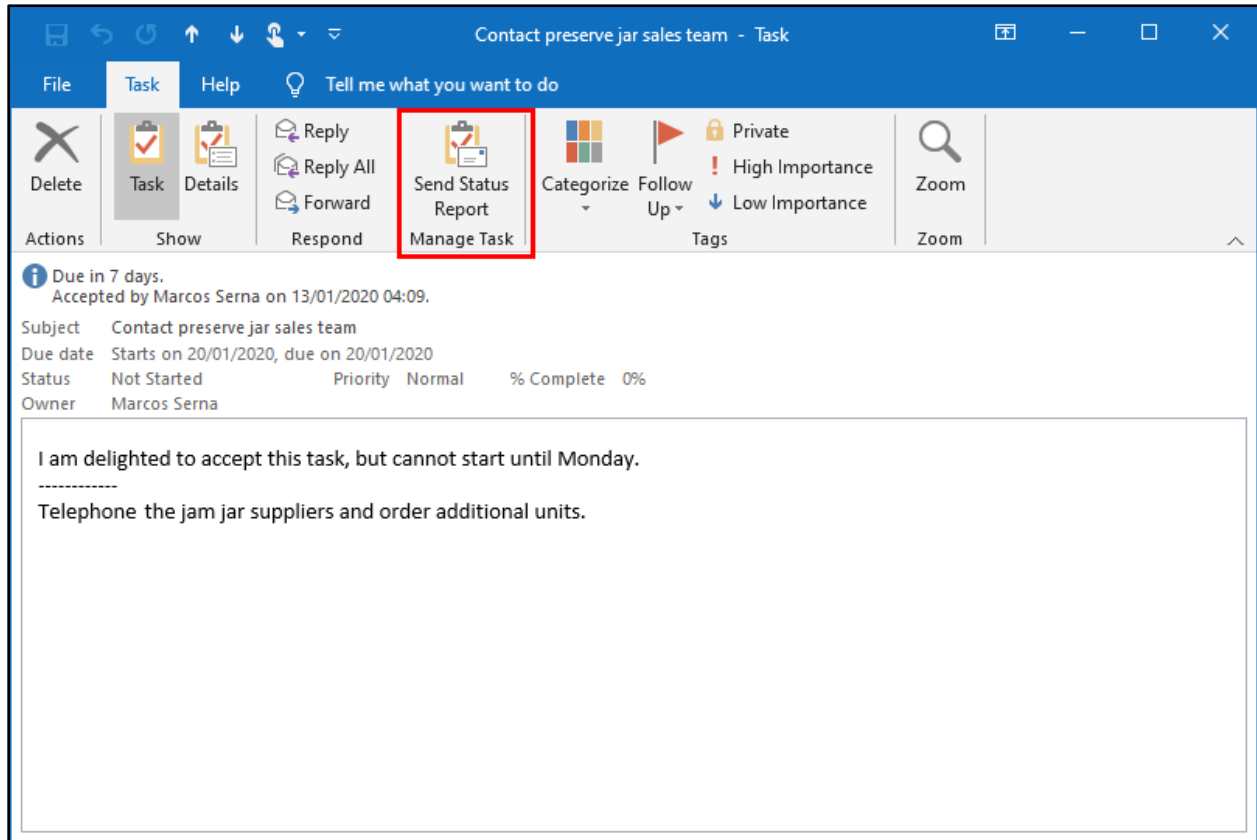
Figure 34: Preparing to send a status report

If the task is assigned, the default recipient of the report is the task owner. However, you can add additional recipients. When you complete the recipients list, update the text with any details about the task, and then select **Send**, as the following screenshot depicts:
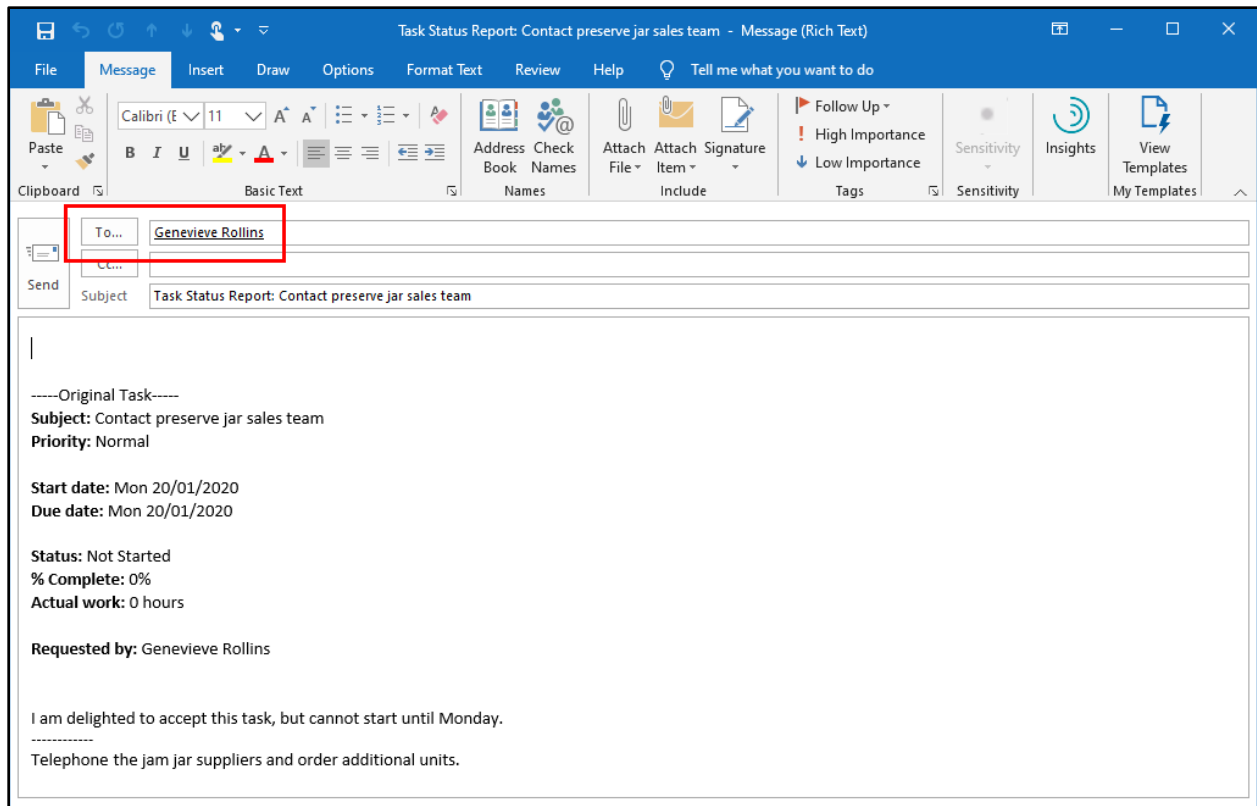
Figure 35: Sending a status report for a task

Additional information

For more information on sending status reports, visit: <u>Send a task</u>
<u>status report</u>

Activity: Think-pair-share

In this activity, you will work with a partner to learn about viewing, accepting, and updating tasks. Your teacher will guide the class through this activity.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Open Outlook.

2. Reach out to a classmate and form a pair.

3. Follow your teacher's guidance and work with your partner to learn about viewing, accepting, and updating tasks.

Try-it: Accept and update a task

In this leveled try-it activity, you'll accept assigned tasks and manage the task status.

Try-it 1

In this try-it, you'll accept a task request from a classmate.

Resources

You will need the following resources for this try-it:

- You must work with a partner. The partner must already have assigned you a task.

Instructions

The following are the general tasks that you need to perform during this try-it:

1. In Outlook, switch to **Mail**.

2. You should have at least one email from a partner or your instructor with the prefix **Task Request**. (It is likely that you have three invites).

3. Select the first of these emails, and then accept the assignment request.

Try-it 2

In this try-it, you'll accept a task from a classmate and update the status.

Resources

You will need the following resources for this try-it:

- You must work with a partner. The partner must assign you a task before the try-it.

Instructions

The following are the general tasks that you need to perform during this try-it:

1. In Outlook, switch to **Mail**.

2. You should have at least one email from a partner or your instructor with the prefix **Task Request**. (It is likely that you have three invites).

3. Select the second email, and then accept the assignment request.

4. Switch to **Tasks**.

5. Open the newly accepted task.

6. Update the **Status** to **In Progress** and save and close the task.

Try-it 3

In this try-it, you'll accept a task from a classmate, update it as complete and send a status report.

Resources

You will need the following resources for this try-it:

- You must work with a partner. The partner must already have assigned you a task.

Instructions

The following are the general tasks that you need to perform during this try-it:

1. In Outlook, switch to **Mail**.

2. You should have at least one email from a partner or your instructor with the prefix **Task Request**. (It is likely that you have three invites).

3. Select the third email, and then accept the assignment request.

4. In Outlook, in **Tasks**, open the newly accepted task.

5. Mark the task as complete.

Wrap-up

Use these questions to check what you learned in this lesson:

1. When you complete an assigned task, which of the following happens?

   Select the correct option.

   a. Outlook automatically marks the task as complete in your tasks list.

   b. Outlook automatically marks the task as complete in the original task owner's list.

   c. The original task owner receives a status report.

   d. All of the above.

2. When someone assigns you a task, and before you accept it, where can you observe the task?

   Select the correct option.

   a. In your task list

   b. In the owner's task list

   c. In the email message the owner sent you

3. Outlook automatically sends a status report to the assigned task's owner every time you make a change to the task.

   Select the correct option.

   a. True

   b. False

4. All email messages that contain a task assignment begin with the following words: _____

   Fill in the blank space.

5. When you have _____ an assigned task, the owner receives a status report.

   Fill in the blank space.

6. The default recipient for status reports for assigned tasks is the original _____

   Fill in the blank space.

Lesson 3: Creating and sharing notes

Overview

Think of Outlook **Notes** as sticky notes that you can use to jot down quick notes and stick them on your desktop or on your **Notes** window. You can also use the **Notes** feature to record detailed notes on a specific meeting or event.

Before you begin working with Outlook **Notes**, you must be familiar with the primary user interface. The **Notes** feature, displayed in the following screenshot, enables you to create, modify, and delete notes.
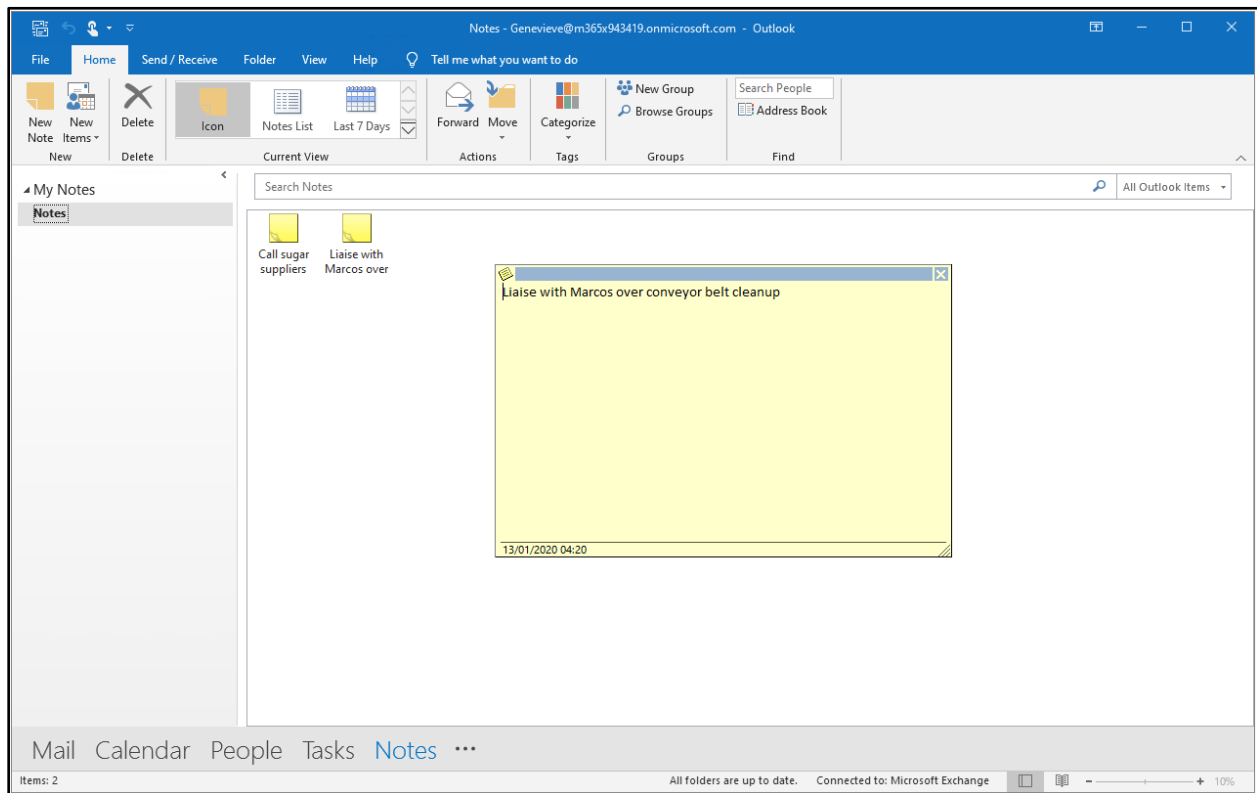
*Figure 36: The **Notes** module in Outlook 2019*

Warm-up

In the previous lesson, you learned how to assign tasks. In this lesson, you will learn how to create and share notes. Use these questions to find out what you already know about this lesson's topics:

1. Which of the following is the default view for notes?

    Select the correct option.

    a. **Last 7 Days**

    b. **Icon**

    c. **Notes List**

2. You can assign notes to someone just as you can assign tasks.

    Select the correct option.

    a. True

    b. False

3. You share notes by _____ them.

    Fill in the blank space.

4. If you want to print the details of a note, choose the _____ style when printing.

    Fill in the blank space.

Topic 1: Create and categorize notes

Just like the repositionable sticky notes you might have on your desk, you can use Outlook **Notes** to keep important information that might not relate to any contact or project.

Create and customize notes

To create a note, go to the **Notes** view. On the ribbon, select the **Home** tab, and in the **New** group, select **New Note**. The following screenshot depicts the **Home** tab on the ribbon in **Notes** view.
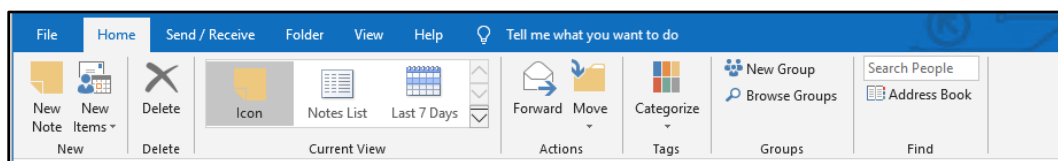
*Figure 37: The Outlook 2019 **Home** tab on the ribbon in **Notes** view*

Microsoft

A new note appears. You can enter any text here.
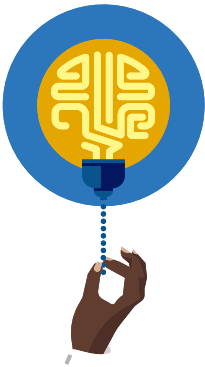
Did you know?

Outlook automatically derives the note title from the text you enter on the first line of the note.

You can add categories to your notes, just as you can with tasks. To do this, select a note from the **Notes** list, and then, on the ribbon, select **Categorize**. Then, select the appropriate category. You will notice that the note icon changes color to match that of the assigned category, as the following screenshot depicts:
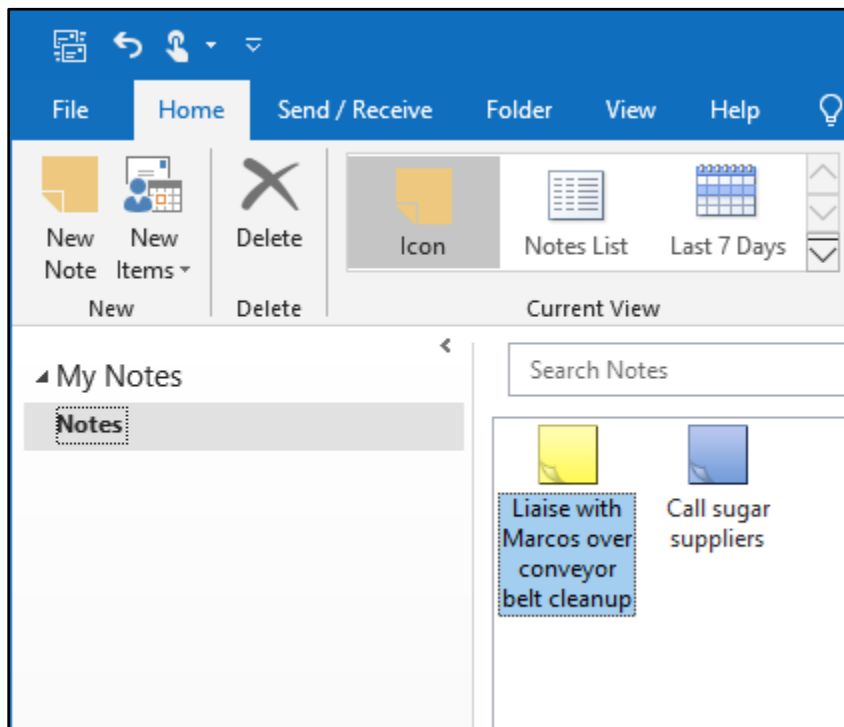
Figure 38: Assigning categories to notes

Additional information

For more information on creating notes, visit: Create a note

You can also change the **Notes** view from **Icon**, which is the default, to **Notes List**, which is depicted in the following screenshot. You can also change it to **Last 7 Days** to view more recent notes.
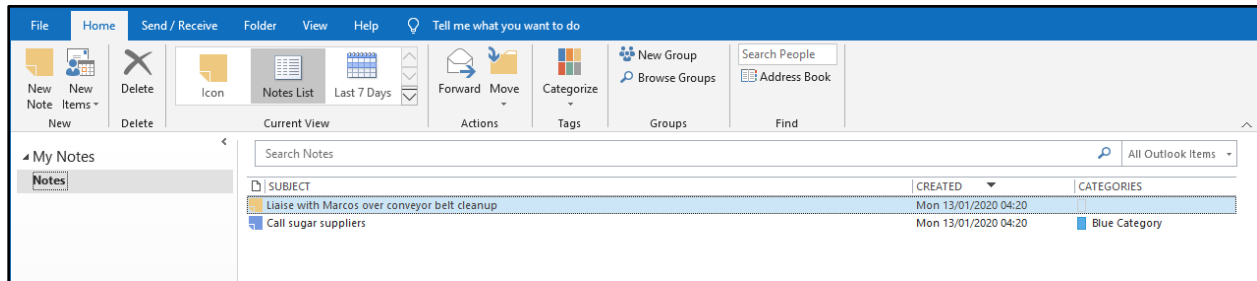
Figure 39: Changing the notes default view

Additional information

For more information on customizing notes, visit: [Customize notes](#)

Activity: Each one, teach one

In this activity, you'll work with a partner to research how to create and categorize notes, and then teach each other what you learned. Your teacher will guide the class through this activity.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Open Outlook.

2. Reach out to a classmate and form a pair.

3. Search Outlook **Help** or open a support article about how to create and modify notes.

4. Teach your partner what you learned, and then discuss with them what they learned.

Try-it: Create and categorize notes

In this leveled try-it activity, you'll learn how to work with notes.

Try-it 1

In this try-it, you'll create a note from the ribbon.

Resources

You will need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. In Outlook, select the **Notes** view.

2. Create a new note from the ribbon entitled **My First Note**.

Try-it 2

In this try-it, you'll create a note using the keyboard.

Resources

You will need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. In Outlook, select the **Notes** view.

2. Select Ctrl+N to create a note entitled **My Second Note**.

Try-it 3

In this try-it, you'll create and categorize a note.

Resources

You will need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. In Outlook, select the **Notes** view.

2. Create two new notes entitled **My Third Note** and **My Fourth Note**.

3. Assign a new category to each note (which will change the note's color).

4. Resize the notes.

Topic 2: Observe and print notes

As with tasks, it can be useful to print a list of your notes and specific note contents.

To observe your notes, double-click the appropriate note, or select it and then select Enter. You can edit text and then save the note by closing it. The following screenshot depicts a note:
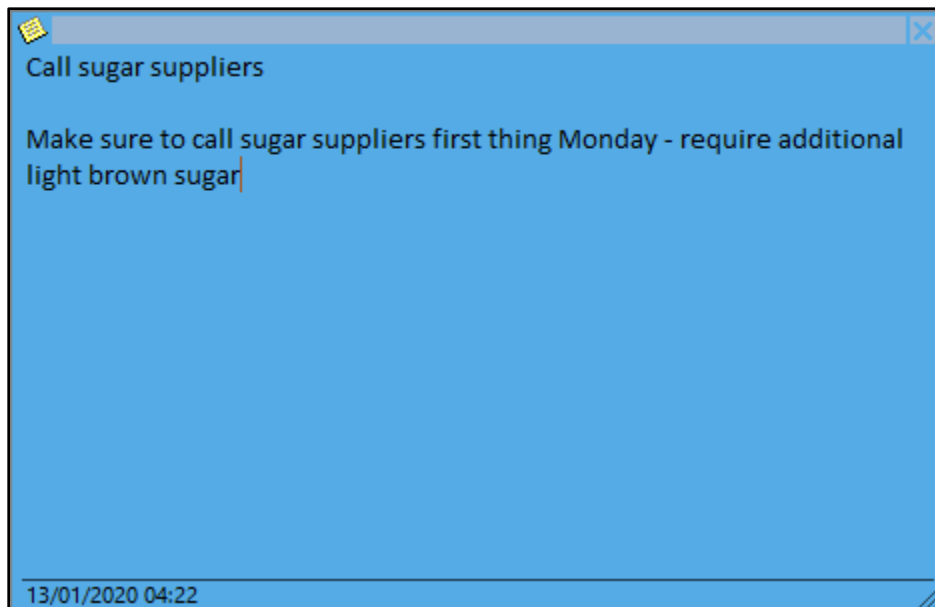
Figure 40: Adding text to a note

To print a note, open it, select **File** on the ribbon, and then select **Print**. On the **Print** page, select **Memo Style**, and then select **Print**, as the following screenshot depicts:
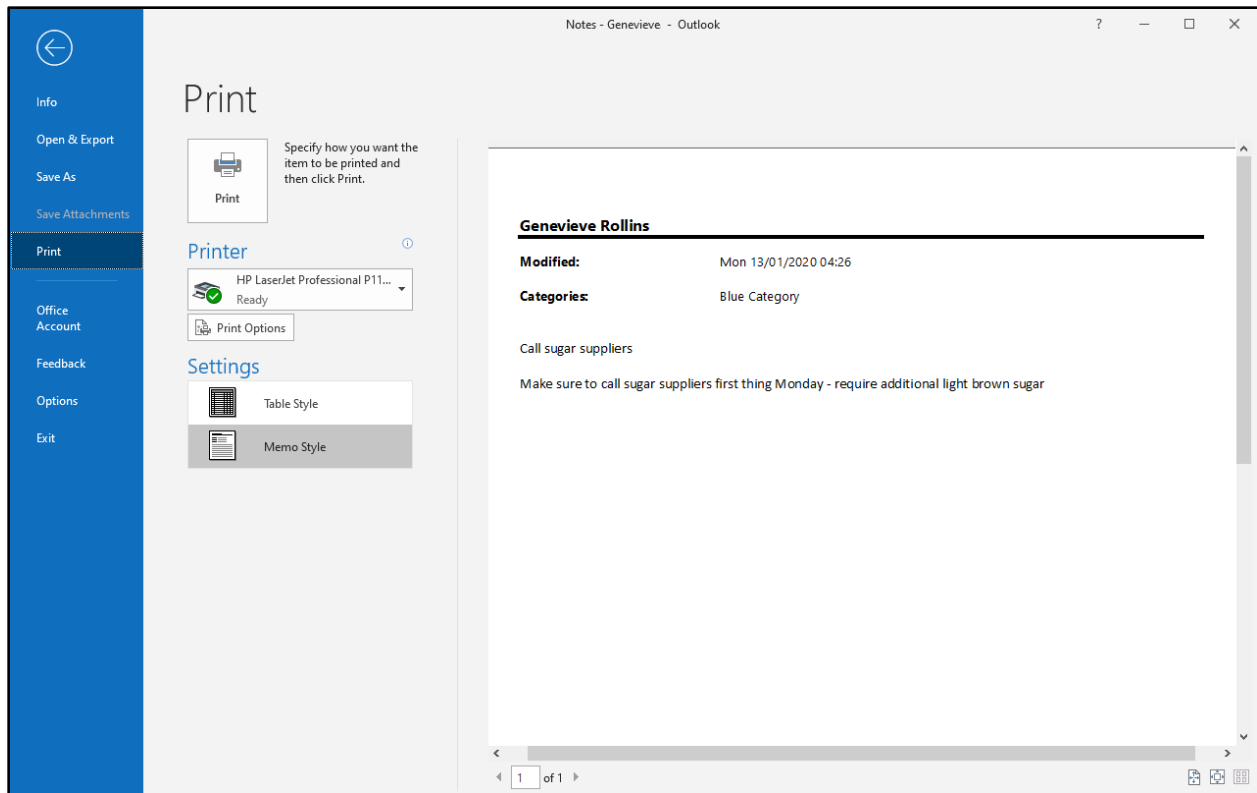
*Figure 41: Print notes in **Memo Style***

To print a list of notes, select multiple notes in the notes list, select **File**, and then select **Print**. On the **Print** page, select **Table Style** and then select **Print**, , as the following screenshot depicts:
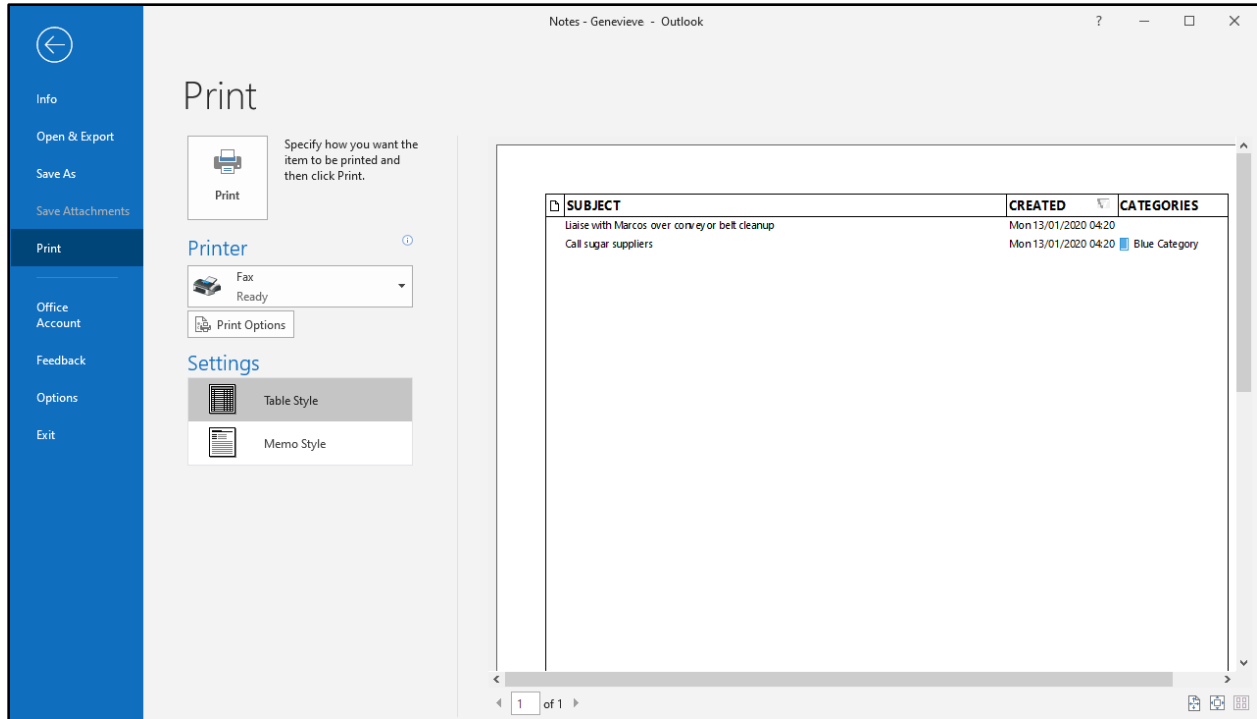
Figure 42: Printing a list of notes

Use Print preview

If you want to observe the note, you can use the print preview option. Note that a preview will automatically display on the **Print** page, to the right of the **Print** button. On the **Print** page, select **Print Options**, and then, in the **Print** dialog box, select **Preview**, as the following screenshot depicts:
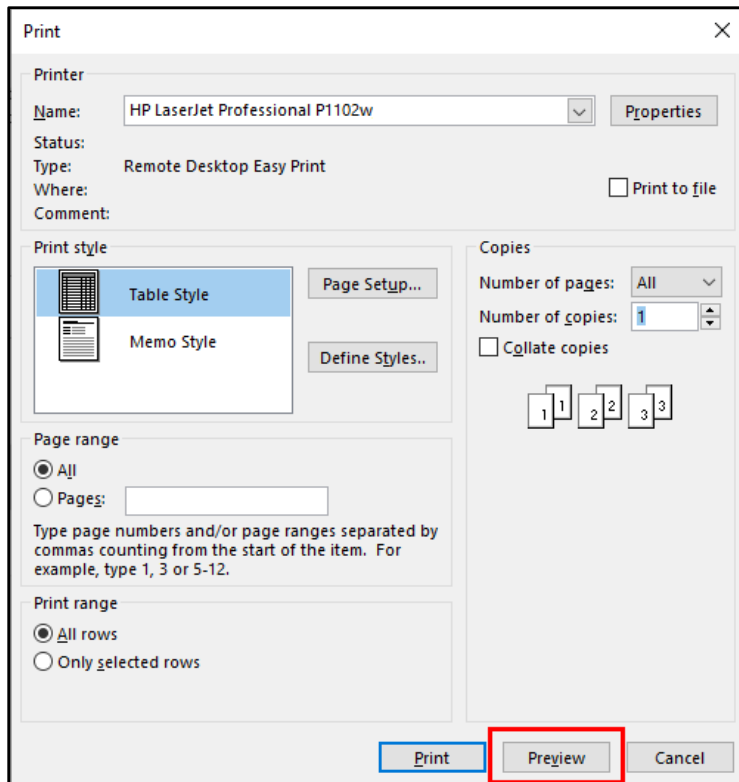
Figure 43: Configuring print options and selecting a preview

From the **Print** dialog box, you can print selected pages, configure page setup options, and define print styles.

Activity: Tell a story

In this activity, you'll review scenarios with your teacher and classmates and discuss reasons why people might choose different views for notes and why they would print them.

Resources required

You will need the following resources for this activity:

• None

Activity instructions

Participate in the activity by following these instructions:

1. Consider scenarios in which you would change the **Notes** view and print a note.

2. Participate in the discussion.

3. Ask your teacher clarifying questions.

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Try-it: Observe and print notes

In this leveled try-it activity, you'll learn how to change notes views and print preview notes.

Try-it 1

In this try-it, you'll observe the notes as large icons.

Resources

You will need the following resources for this try-it:

- Your computer should have **Microsoft Print to PDF** as a printer option. If not, choose another local printer, or else just skip the printing step.

Instructions

The following are the general tasks that you need to perform during this try-it:

1. In **Notes**, change the view to use **Notes List**.

2. Change the view to **Icon**.

Try-it 2

In this try-it, you'll observe notes grouped by category.

Resources

You will need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Change the view to **Notes List**.

2. In the columns, select the **Categories** column to sort the view by category.

Try-it 3

In this try-it, you'll preview your notes.

Resources

You will need the following resources for this try-it:

- None

Instructions

The following are the general tasks that you need to perform during this try-it:

1. Go to the **Notes** view. On the ribbon, select **File**, and then select **Print**.

2. Choose **Table Style** and then print your list of notes to **Microsoft Print to PDF**, if available. If not, simply examine the preview on the right side of the screen.

Topic 3: Forward a note by using email

Unlike paper notes, with Outlook **Notes**, you can make use of Outlook's email capabilities and send your notes via an email to colleagues.

Forward a note by email

To forward a note by email, locate the note, or notes, right-click or access the context menu, and then select **Forward**, as the following screenshot depicts:
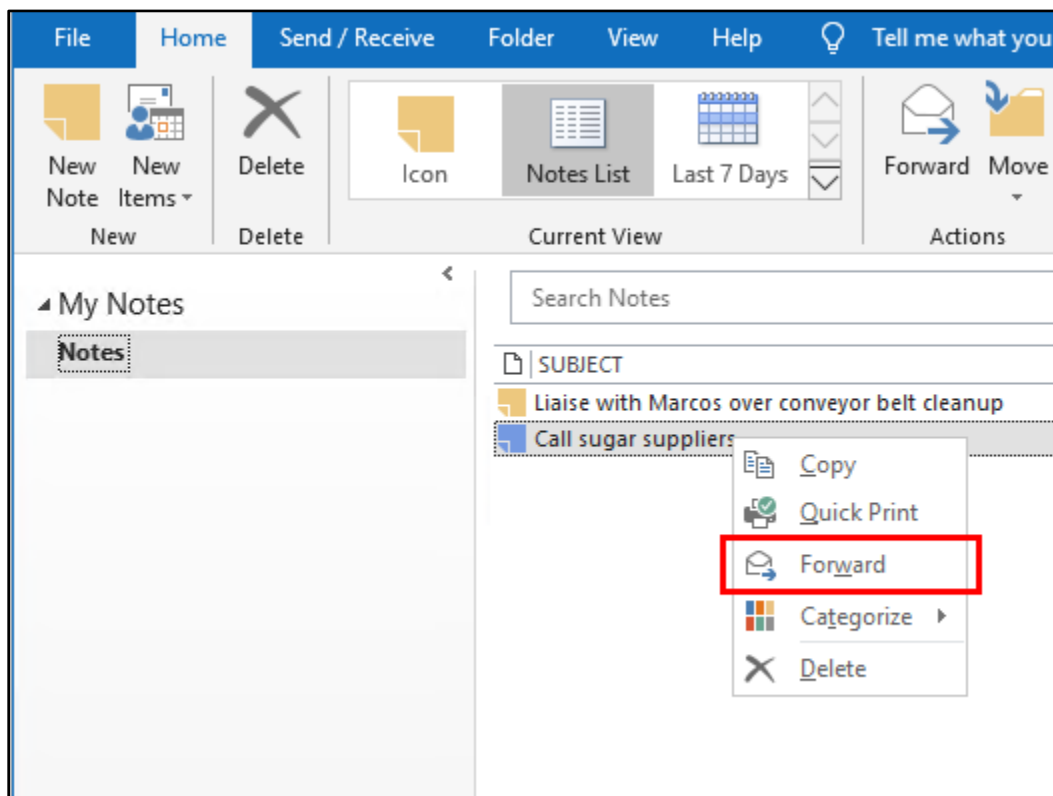
Figure 44: Forwarding a note

A standard email template loads, with your note attached. Enter the desired recipients, and then select **Send**. The following screenshot depicts an email with a note:
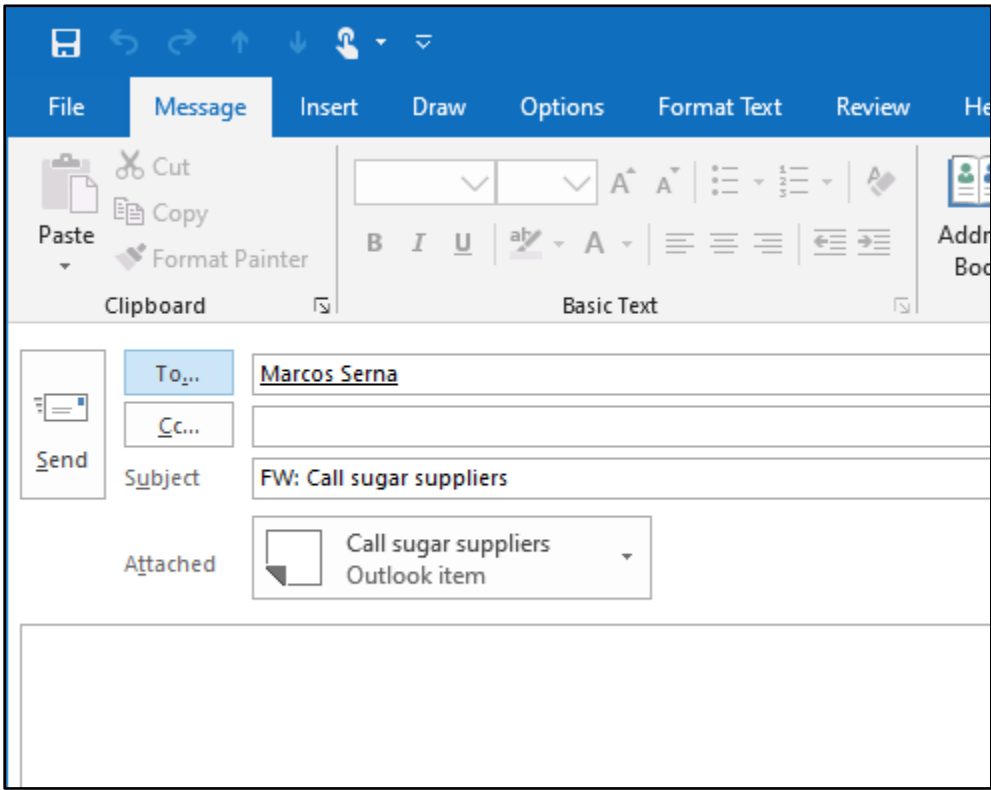

Figure 45: Viewing the email for a forwarded note

When the recipient of your note receives your email, they can select the attachment and observe the note directly, as the following screenshot depicts:
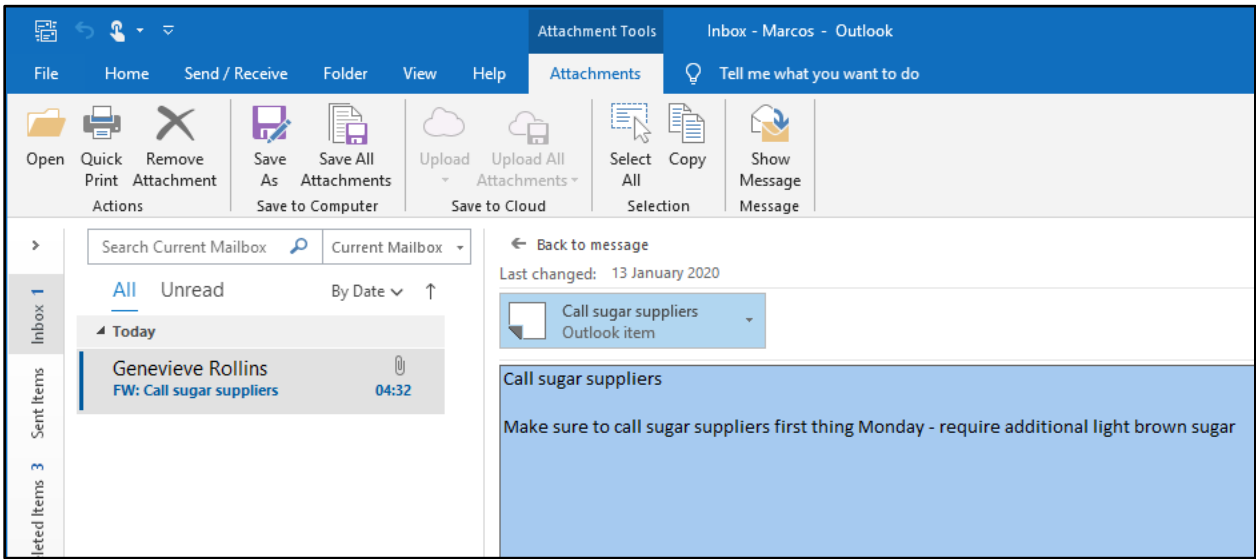
Figure 46: Viewing a forwarded note with email

Activity: Think-pair-share

In this activity, you'll pair up with a classmate and research how to send each other notes. Your teacher will guide the class through this activity.

Resources required

You will need the following resources for this activity:

- None

Activity instructions

Participate in the activity by following these instructions:

1. Connect to the Internet and search for documents relating to Outlook **Notes** and how to forward them.

2. Share your research with your partner.

Try-it: Forward a note by using email

In this standalone try-activity, you'll forward a note to a classmate.

Resources

You will need the following resources for this try-it:

- You must work with a partner. You must have that partner's email address.

Instructions

The following are the general tasks that you need to perform during this try-it:

1. In **Notes**, select your first note.

2. On the ribbon, select **Forward**.

3. Enter a partner's email address and send the note.

4. If your partner has sent you a note, switch to **Mail**.

5. Open the email item, and then select the attachment. It should open in preview. If not, double-click the attachment, or select it and then select Enter.

Wrap-up

Use these questions to check what you learned in this lesson:

1. You can assign **Follow Up** tags to notes.

   Select the correct option.

   a. True

   b. False

2. To save a note, what do you need to do?

   Select the correct option.

   a. Select **Save & Close** on the ribbon.

   b. Select **Save** on the context menu.

   c. Close the note.

3. You cannot assign notes, but you can _____ them.

   Fill in the blank space.

4. Outlook automatically derives the name of a note from the _____ line of text in the note.

   Fill in the blank space.

Detach the module .pst file

After you complete all try-its, you must detach your .pst file so your teacher can assess your work. To do this:

1. In **Outlook**, on the **Navigation Bar**, select the **ellipsis** (**Navigation Menu** button), and then select **Folders**.

2. Locate the folder called **M7_module_PST_starter_Firstname_Lastname**, and right-click or access the context menu for the folder.

3. On the context menu, select **Close** "**M7_module_PST_starter_Firstname_Lastname"**.

4. On your computer, open **File Explorer**, and then go to the path where the .pst file resides.

5. Right-click or access the context menu for the file, and then select **Rename**.

Microsoft

6. Append your name to the end of the existing file name by using underscores instead of spaces. For example, enter **_Firstname_Lastname**. The filename should now resemble **M7_module_PST_starter_Firstname_Lastname**.

7. Copy the .pst file to the designated location for assessment.

Cornerstone

Overview

In this Cornerstone, you will use tasks and notes in Outlook to manage your workload at Munson's Pickles and Preserves Farm. You'll create, print, and assign tasks. You'll also create and share notes with your coworkers.

Objectives

The following table outlines the Cornerstone objectives and their corresponding Microsoft Office Specialist (MOS) exam objectives.

Cornerstone project objectives	MOS exam objectives
Create and print tasks.	• 4.3.1: Create and manage tasks
Assign tasks.	• 1.1.1: Change the display of messages, calendar items, contact records, and tasks • 1.4.1: Print message, calendar, contact, and task information • 4.3.1: Create and manage tasks
Create and share notes.	None

Table 5: Cornerstone objectives

Duration

50 minutes

Attach the Cornerstone .pst file

To complete this Cornerstone, you must attach this .pst file into Outlook before you can perform any tasks. You'll also store the results of your tasks in this .pst file so that your teacher can assess your working by examining that file.

To open the .pst file in Outlook:

1. Open **Outlook**.

2. Select the **File** tab, and then select **Open & Export**.

3. In the **Open** pane, select **Open Outlook Data File**.

4. In the **Open Outlook Data File** dialog box, use the **navigation** pane to locate the .pst files provided by your instructor for your use throughout this module of the course.

5. Open the file named **M7_cornerstone_PST_starter**. Note that a folder **M7_cornerstone_PST_starter** is now available in the navigation pane. This folder contains any required starter elements for the Cornerstone, such as emails, calendar appointments, tasks, and contacts.

6. Right-click or access the context menu for the **M7_cornerstone_PST_starter** folder, and then select **Data File Properties**.

7. In the **M7_cornerstone_PST_starter Properties** dialog box, select **Advanced**.

8. In the **Outlook Data File** dialog box, in the **Name** box, append your name to the end of the existing name by using underscores instead of spaces. For example, enter _Firstname_Lastname. The folder name should now resemble **M7_cornerstone_PST_starter_Firstname_Lastname**.

9. Select **OK** twice.

Copy content into the Cornerstone .pst file

As you proceed through this Cornerstone's tasks, you should copy the resulting elements, such as emails, calendar appointments, tasks, and contacts, to the **M7_cornerstone_PST_starter_Firstname_Lastname** folder by using the following instructions:

1. After you attach the .pst file, you should be able to observe duplicate folders for items such as emails, calendar appointments, tasks, and contacts.

2. After you complete a try-it exercise, select your resulting items in the navigation pane. Make sure you select the items that are associated with your email account.

3. In the details pane, right-click or access the context menu for each item, and then, select **Copy or** select Ctrl+C.

4. Select the **M7_cornerstone_PST_starter_Firstname_Lastname** folder.

5. Select Ctrl+V to copy the item to the .pst file.

6. Repeat steps 3 through 5 for any additional items that you want to copy.

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Instructions

1. Complete the following tasks.

2. When you finish the Cornerstone, assess your completion and enter the points you think you earned within the following task lists. Ask your teacher for help if needed.

Tasks

The following are the tasks you need to do in this Cornerstone.

Task 1: Create and manage tasks (10 points)

1. Create a new task called **Cornerstone Task**. (2 points)

2. Assign the task **High Importance**. (2 points)

3. Modify the task to include a **Follow Up** flag for next week. (2 points)

4. Set a reminder for your new task. (2 points)

5. Create two additional tasks (entitled **Cornerstone Task 2** and **Cornerstone Task 3**) and assign each a **Follow Up** flag. Assign one **Low Importance**. (2 points)

Points scored: _____ / 10

Task 2: Manage task views (10 points)

1. Change the current view to sort your tasks by priority. (2 points)

2. Modify the **% Complete** status of each of your tasks. Choose a different value for each task. (2 points)

3. Create a new view called **Munson's Cornerstone View** that sorts by **% Complete**. (4 points)

4. Change back to the default view. (2 points)

Points scored: _____ / 10

Task 3: Assign tasks (10 points)

1. Create a new task called **Cornerstone Task 5** that requires a **Follow Up** tomorrow. (2 points)

2. Assign the task to either a classmate or your teacher, as instructed. (2 points)

3. Accept your classmate's task assignment. (2 points)

4. Complete your assigned task, and then review the status report you receive for the task your partner has completed. (4 points)

Points scored: _____ / 10

Task 4: Print tasks (4 points)

1. Print all tasks as a list to a PDF file, if available. If not, simply preview the list of tasks. (2 points)

2. Print a specific task's details to a PDF file, if available. If not, preview the output. (2 points)

Points scored: _____ / 4

Task 5: Create and share notes (6 points)

1. Switch to **Notes** and create two demonstration notes called **Note One** and **Note Two**. (2 points)

2. Assign each note a different category. (2 points)

3. Forward one of your notes to a partner. (2 points)

Points scored: _____ / 6

TOTAL POINTS: _____ / 40

Detach the Cornerstone .pst file

After you complete all tasks, you must detach your .pst file so that your teacher can assess your work. To do this:

1. In **Outlook**, on the **Navigation Bar**, select the **ellipsis** (**Navigation Menu** button), and then select **Folders**.

2. Locate the folder called **M7_cornerstone_PST_starter_Firstname_Lastname**, and right-click or access the context menu for the folder.

3. On the context menu, select **Close** "**M7_cornerstone_PST_starter_Firstname_Lastname**".

4. On your computer, open **File Explorer**, and go to the path where the .pst file resides.

5. Right-click or access the context menu for the file, and then select **Rename**.

6. Append your name to the end of the existing file name by using underscores instead of spaces. For example, enter **_Firstname_Lastname**. The filename should now resemble **M7_cornerstone_PST_starter_Firstname_Lastname**.

7. Copy the .pst file to the designated location for assessment.

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