



Microsoft Outlook 2016

Essentials

INFOCUS COURSEWARE

Designed to fast-track you through the process of learning about computers and information technology, the *In Focus* range is a unique and innovative concept in learning.

A quick reference summary of key procedures is provided at the bottom of each page together with handy tips and additional information.

Each title in the *In Focus* series can be used as:

- a classroom workbook for instructor-led teaching and training;
- a self-study guide for self-paced learning;
- a tutorial guide for distance education programs;
- a resource collection of just-in-time support and information for help desk users and support staff;
- a handy, desk-side reference for computer users.

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Microsoft Outlook 2016 Essentials

MICROSOFT OUTLOOK 2016 ESSENTIALS

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47 Greenaway Street
Bulleen Vic Australia 3105
Telephone: (61 3) 9851 4000
Facsimile: (61 3) 9851 4001
Web site: www.watsoniapublishing.com

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READ ME FIRST

In case you're not familiar with the terminology, *Read Me First* is quite often the name given to a computer file that contains important information for people to know prior to using an application.

This section contains some important information to help you use this book so we thought we'd start with a *Read Me First* section.

What skills and knowledge you will acquire...

The skills and knowledge acquired in Microsoft Outlook 2016 - Essentials are sufficient to be able to use and operate the software effectively.

What you'll need to know before beginning this course...

Microsoft Outlook 2016 - Essentials assumes little or no knowledge of the software. However, it would be beneficial to have a general understanding of personal computers and the Windows operating system environment.

The objectives of this guide...

At the completion of this course you should be able to:

- understand some of the more basic email concepts
- create and send email messages
- receive emails in your **Inbox** and then work with them
- competently work with file and item attachments within email messages
- effectively edit email messages
- organise and work with mail folders and use quick steps
- use the search facilities to locate messages and other **Outlook** items
- work with message views
- work with message flags and reminders
- create and work with colour categories
- create and use rules to manage your email messages
- work effectively with junk email
- use many **Outlook** features as you work with email messages

What you get in a chapter...

Each chapter begins with a summary page listing the topics covered in that chapter. The chapter then consists of single-page topic sheets pertaining to the theme of the chapter.

What you'll need to have before commencing this course...

Many of the topics in this learning guide require you to open an existing file with data in it. These files can be obtained from your instructor and need the product code for this course which is OutlookEssentials.

As you work through this guide...

It is strongly recommended that you close all open files, if any, prior to commencing each new chapter in this learning guide. Each chapter, where relevant, has its own set of exercise files and any from a previous chapter are no longer required.

Where to from here...

Have a look at the next page which explains how a topic page works, ensure that you have access to the exercise files (see above), and you're ready to make a start.

WORKING WITH TOPIC SHEETS

The majority of this book comprises single-page topic sheets. There are two types of topic sheets: **task** and **reference**. The layout of both is similar – an *overview* at the top, *detail* in the centre and

additional reference (optional) material at the bottom. *Task* sheets contain a *Try This Yourself* step-by-step exercise panel in the detail area as shown below.

Word Processing Simple Documents

1 **OPENING A DOCUMENT**

Although there are a number of different ways to open a Word file, which include using the **Start** menu or clicking directly on an icon of the file, perhaps the best and simplest way to do it is from within the Word program itself using the **File > Open** command. The **Open** dialog box has tools that help you to identify file types and location.

3 **Try This Yourself:**

Before you begin ensure that *Word 2000* has started.

- 1** Select **File > Open** to display the **Open** dialog box.
- 2** Click on the drop arrow for **Look in** to display a list of possible locations available to your computer where documents may be found.
- 3** Click on **Drive C (C:)** or its equivalent on your computer.
- 4** The contents of drive C: will now be displayed in the **Open** dialog box...
- 5** Double-click on **Course Files For Word 2000** – this is the folder where files for this course can be found.
- 6** The contents of the folder **Course Files For Word 2000** will now be displayed...
- 7** Click on **W002 Document Essentials_1.doc** to select it as the file that you wish to open, then click on **[Open]** to open the document on the screen.

5 **For Your Reference...**

To open a document in Word:

1. Select **File > Open** to display the **Open** dialog box.
2. Locate the file and folder (if necessary)
3. Click on **[Open]**

6 **Handy to Know...**

There is more than one way to open a document in Word. Alternatively you could:

- Click on the **Open** tool
- Select a recently opened file from the **File** menu.

Skillgate Learning Centres Page 10 Chapter 2: Working With A Document

- 1** Topic name
- 2** General topic overview provides an introduction to the topic
- 3** *Try This Yourself* (Task-based topic sheets) is a detailed step-by-step practice exercise for you to work through. In *Reference* topic sheets this is usually replaced by a box with reference information.
- 4** In *Task* topic sheets screen shots and graphics provide a visual clue as to what will happen when you work through the *Try This Yourself* practice exercise. In *Reference* topic sheets the screen shots and graphics are used to visually represent information and concepts.
- 5** The *For Your Reference* (optional) element provides a quick summary of the steps required to perform a task. These usually only appear in Task-based topic sheets.
- 6** The *Handy To Know* (optional) element provides additional information such as alternate ways of accomplishing a task or further information providing handy tips.

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CHAPTER 1 EMAIL CONCEPTS

InFocus

Email provides a great way of communicating with friends, colleagues, business associates and the like. But with email comes certain responsibilities such as knowing how to protect yourself and others from viruses, understanding etiquette, dealing with spam and more.

In this session you will:

- ✓ gain an understanding of how email works
- ✓ gain an understanding of email addresses
- ✓ gain an understanding of the benefits of email
- ✓ gain an understanding of general email etiquette
- ✓ gain an understanding of emails and viruses
- ✓ gain an understanding of digital signatures.

HOW EMAIL WORKS

'**Email**' is an abbreviation of **electronic mail** and refers to a message that is sent from one computer to another. The computers may be in the same building and linked via a local network,

or they may be located some distance apart and connected via the internet. Here we'll look at the main components of an email system that facilitate the sending and receiving of emails.

Email Client

To send email from your computer you will need an email application (which is also known as an **email client**). The email client allows you to compose and send emails to other people, and to receive, read and delete emails.

The email client could be standalone and installed on your computer (like Microsoft Outlook which is supplied with Microsoft Office) or it could be web-based (such as Gmail, Hotmail etc).

Email Server

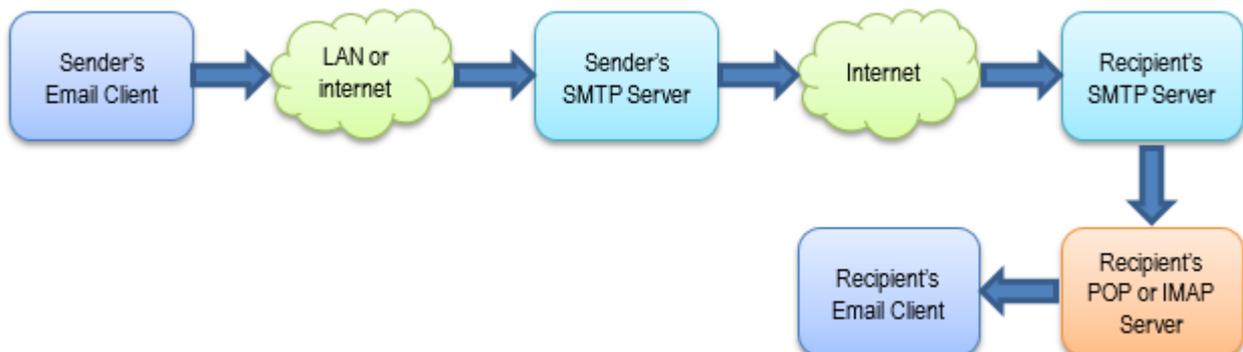
While an email client is used for writing and reading emails, it is the role of an **email server** to ensure that email is dispatched to the correct location and recipients.

The email server takes the emails that you have created and sends them through the appropriate electronic pathways to the intended recipients. It also collects email messages that people are sending to you and delivers these emails to the email client on your computer.

If you send email messages to people in your company, these messages will generally only pass through one email server – the one that looks after the internal email in your business. This will most likely be something like Microsoft Exchange Server. When you send an email to a colleague within your company, that email is sent to the server and the server then passes it to the email client on your colleague's computer – this is done in an instant.

When you send email via the internet, however, the business of email servers becomes more complicated. Generally, it is your Internet Service Provider (ISP) who handles your internet email, and, given the volume of mail they handle, they will have quite a few computers to do this. With internet email there are separate servers that handle outgoing email (email that you are sending) and incoming email (email that someone is sending to you). Outgoing email is handled by an SMTP server (SMTP stands for Simple Mail Transfer Protocol), while incoming email is handled by a POP server (POP stands for Post Office Protocol) or IMAP server (IMAP stands for Internet Message Access Protocol).

To be able to send and receive emails via the internet, computers need to be connected to both an SMTP and POP/IMAP server. Therefore, when you send an email to someone via the internet, it leaves your email client and goes to your ISP's SMTP server. From here it is sent to the destination SMTP server which collects the email and places it in the appropriate location so that it is accessible to the recipient's email client through POP or IMAP services. The recipient's POP/IMAP server then passes it to the recipient's email client. A summary of this process is shown below.



Email Account

To use an email server you will need to have an email account. An email account is normally made up of two components: a user name which identifies you to other people and the system, and a password which ensures that other people can't access your mail.

With a proper user name (sometimes known as a user ID) and a password, your computer can connect to an email server.

EMAIL ADDRESSES

Just as your street address identifies where you live, an email address identifies where other people can send emails to you. However, unlike street addresses, email addresses comprise only

a single line of characters. Once you understand what they mean, the characters can tell you a great deal about the owner of the email address.

Identifying Email Addresses

An **email address** is a unique address on the internet that allows people to send email messages to you.

An email address is written using the following format:

username@domainname.topleveldomain.country

An example of an email address might be:

jane@watsoniapublishing.com.au

The @ symbol in the middle of the address is known as an **at** symbol. If read aloud, the sample email address above would be spoken as 'jane at watsonia publishing dot com dot au'.

Note that email addresses are not case sensitive. But, in most locations the standard convention is to write email addresses in lowercase.

The User Name

The **user name** is used to identify the name of the owner of the email address. It is usually descriptive and pretty close to the actual name of the person. It could be just the first name, just the last name, both first and last names, first name plus the first letter of the person's last name, and so on. For example, Jane Smith may appear as: 'jane', 'smith', 'janesmith', 'janes', 'jsmith' and so on.

While there are no rules governing how the user name should appear, some workplaces have established a particular style that they want you to use. Your system administrator at work will probably set up your email address for you following company practice.

The Domain Name

The **domain name** helps the internet identify the location of the email server that is hosting the email account. Sometimes, the domain name reflects the name of the Internet Service Provider (e.g. janes@bigpond.com) and other times it might be the name of your workplace (e.g. jane@watsoniapublishing.com).

The Top Level Domain

The **top level domain** normally consists of three letters and identifies the type of organisation associated with the host's name. Examples of common top level domains include:

.com	private or public company
.gov	government department or organisation
.edu	educational institution
.net	networks usually reserved for Internet Service Providers
.org	non-commercial organisations

The Country Identifier

Email addresses outside the United States are usually identified with an additional two letters at the end. Some of the more common ones are **au** for Australia, **uk** for United Kingdom, **nz** for New Zealand, **de** for Germany, **fr** for France, and so on.

THE BENEFITS OF EMAIL

There is little doubt that email has provided the greatest communication revolution since the invention of the printing press. With many people email has all but replaced the use of regular mail,

and billions of messages are sent every day. Email presents enormous benefits and advantages over traditional mail. Some of these are presented below.

It's Fast

Using email, you can send a message to someone on the other side of the world literally within seconds. It is possible, therefore, to have an email 'conversation' where you are sending short messages back and forth with someone next door, in the next state or territory, or even on another continent.

It's Cheap

These days many small businesses can use free web email services to send and reply to email which helps to save money. Email means that businesses no longer have to rely on potentially expensive phone calls or the cost of mailing documents and information. It also allows you to get things done in a more efficient time frame which allows you to take on more customers and improves the business' reputation.

It's Convenient

Email has become popular largely due to how convenient it is. As opposed to hardcopy files, email can be accessed anywhere. This allows greater flexibility in the workplace, meaning even if you are out in the field, at a conference, or on the road you can still access and send information. For example, if you are travelling you can use your phone or mobile device to send emails as long as you have access to Wi-Fi or mobile data. If you don't have access to a mobile device, you could use a computer at an internet café or hotel.

Most employees now feel more comfortable using email than traditional letters or memos.

As opposed to a phone call, an email allows one to have time to carefully word sensitive subjects and create a more professional line of communication.

It Provides A Record

Emails that you send to other people are kept in the **Sent** box, allowing you to keep a record of all of your email interactions. You can search your emails to find correspondence with specific people or on a specific subject, enabling you to easily refer back to a conversation without having to bother the people involved. You can also choose to archive important emails that may be needed in future, such as emails containing important information or emails you may need to retain for legal reasons.

It Provides Access

Email provides you with a way to communicate with almost anyone in the world. The vast majority of businesses and even individuals will have an email address. This makes contacting potential clients much easier and allows you to send marketing materials and such out to both existing and potential customers.

EMAIL ETIQUETTE

It is important to remember that unlike a phone conversation, an email conversation is there forever and can be referred back to at any time. Therefore, you should adopt courteous and polite

habits when writing email messages. Quite a few guidelines have now been developed to help you some of these are listed below.

The Beginning And The End

Ensure that you begin your emails with a courteous greeting and end them with a courteous closing. It is usually seen as polite to address the email to the recipient and sign off with your name.

Short Is Sweet

Ensure emails are concise and to the point so that you do not waste the recipient's time.

Spelling And Grammar

When you have composed your message spend some time using the spell checker to check the spelling. Then re-read the message and ensure that there are no typos or spelling and grammar mistakes. Emails that have errors look unprofessional and may not be taken seriously.

Make The Subject Line Meaningful

Always put meaningful text in the subject line of a message, such as 'Sales Figures for June', and so on. This ensures that there is a greater chance that the email will be read in a timely manner as the person receiving the message will know what the content is about. It also makes it easier for the person to find the email again.

Watch What You Say

When we talk to someone face to face there are many nonverbal cues that help us to interpret what is being said, such as body language and tone of voice. In an email you can only read what has been written, so when composing an email be careful if using sarcasm or humour as it can easily be misinterpreted.

Avoid Flaming

Flaming is the act of telling somebody off using an email – and it should NEVER be done. If you have an issue with someone, contact them over the phone or face to face, but never through an email. The big danger with email is that it can be read over and over again. If you use email to dress down someone they can read it several times and become angry or upset. They may flame you with an equally or even more vitriolic email.

Don't SHOUT

Avoid using capital letters (except in the proper literary way for sentence starts, names, and the like) as in an email it can come across as shouting.

Check The Attachments You Send For Viruses

Always scan documents for viruses before sending them as attachments.

Protect The Privacy of Others

When you want to send an email to a group of people you enter their email addresses either in the **To** or the **Cc** fields. There can be two problems with this: firstly, all recipients know exactly who else received the message, and secondly, the email address of each recipient may be visible to all of the other recipients. If you are sending a message to many people and it is not necessary for the recipients to know who else received the message, put their addresses in the **Bcc** field and put your own address in the **To** field – Outlook needs to have at least one address in the **To** field.

EMAILS AND VIRUSES

A virus is a computer program transmitted (usually) via the internet that infects computers with the intent of causing damage to your files and/or software. Some can delete all information

on a hard drive, others can tie up traffic on a computer network, while others can replicate and send themselves to other computers using your contacts.

Types of Viruses

There are many types of viruses, the most common being: **boot sector viruses** that infect the start-up program of your computer, **program viruses** that infect software programs on your computer, and **macro viruses** that infect macro programs written in Microsoft Word or Microsoft Excel. Within these types there are two broad categories: **Trojans**, which appear hidden and perform their nasty deeds without you noticing; and **Worms** which remain invisible, consume the resources on your computer, and appear only as your computer begins to slow down.

How Do You Get A Virus?

At the present time there are several ways that a virus can get itself onto your computer:

1. From a software program that you download from a website. The software program (usually from a dubious source) will contain the virus that will infect your computer when the software is run.
2. From an email containing an attachment (this may be a program or a document with a macro virus) which has been designed to automatically start as soon as you double-click on the attachment to open it.
3. From an email containing corrupted web links that enable a virus to download onto your computer when you click on the link.

Note, however, that some email viruses will launch without even being opened – they will launch when you view the infected message in the preview pane of your email software!

How Do You Prevent Viruses From Infecting Your Computer?

The best way to protect your computer is by not having it connected to the internet or any form of network. However, this is obviously impractical in this day and age. Instead, you should follow some basic rules to minimise your risk of being infected.

- Install, use and constantly update a good anti-virus software application on your computer, such as Nortons, Symantec and so on. Set up the anti-virus software so that it runs in memory – this ensures that it is vigilantly and constantly checking incoming files for possible dangers and threats.
- Install a firewall – this is special software that protects your computer from unwarranted entry from the internet. Your company may already have a firewall set up.
- *Never* click on links in emails from people you don't know, just delete these messages immediately. If you want to check whether the web address in a link is valid, manually type it into the address bar in a browser.
- Because hackers can readily raid email contact lists, carefully read emails from friends. If an email appears suspicious, don't click on any links or download any files. Delete it and ring your friend. If it was valid, they can re-send you the email.
- *Always* use the anti-virus software to scan email attachments and never open an attachment until it has been scanned and cleared.
- *Never* download software from dubious sources, such as screensavers, icons, freeware and so on.

Note: With the sophistication of hackers and virus writers increasing daily, ensure that you check all of your incoming email very carefully!

DIGITAL SIGNATURES

While email and the internet provide a cheap, convenient and very fast way of transmitting information, they are relatively easily accessed. One way to ensure that emails you send and

receive are secure is to use **digital signatures**. Digital signatures help to validate your identity and they can be used to sign important documents electronically.

About Digital Signatures And Digital IDs

Because some hackers send out email messages that appear to come from other people, it has become important for people to verify that their incoming messages have actually come from known colleagues, clients or friends.

By using a **digital signature** you can prove to the recipient that the content of the message was signed by you and not an imposter, and that the contents have not been altered in transit. Unlike a handwritten signature, a digital signature is hard to fake because it contains encrypted information that is unique to the signer and which is easily verified. When the recipient opens the message, the digital signature is validated and an icon will appear in the **Signed by** status line in the message header indicating the status of the signature. There is an icon that shows the signature is valid and another that reveals the signature is invalid.

Before you can send an email message containing a digital signature, you must first obtain a **digital ID**. Outlook enables you to do this from the **Trust Centre** (select **File > Options > Trust Centre** and then click on **[Trust Centre Settings]** and **E-mail Security**). From the **Trust Centre**, you can either import an existing digital ID from elsewhere (your employer may obtain one for you if you work in a large organisation) or you can obtain one from a third-party provider.

Digital IDs operate using a pair of keys: a **public key** and a **private key** – a key here is a bit like a pin number for a bank account. These keys are used for encrypting and decrypting data. If you use your digital signature to encrypt a message, you will need to export to the recipient a **certificate** that contains your public key (so that the recipient can add it to their address book and then Outlook can use this key to unravel or decrypt the information in the message) plus other information that the recipient's computer will need to validate your digital signature.

Adding a digital signature slows down the process of sending a message somewhat because your computer has to check with the computer that issued your digital ID to verify your signature. But because Outlook checks your digital ID, your recipient can be sure that your message came from you – which of course is the whole point of digital signatures.

NOTES:



CHAPTER 2 SENDING EMAIL

InFocus

Email messages are used in much the same way as letters sent through the post – they are designed to communicate with one or more people.

Like any good letter, an email message needs to be addressed (although a special electronic form of addressing is used here). Email messages usually appear with a **subject** so that they can be identified.

Messages can also be marked as important, and have sensitivity levels and settings (such as confidential, private and so on) applied.

In this session you will:

- ✓ gain an understanding of email accounts in **Outlook**
- ✓ gain an understanding of how the **Outlook** mail process works
- ✓ gain an understanding of how you compose an email message
- ✓ gain an understanding of the ribbon and header areas in the message window
- ✓ learn how to create a new email message
- ✓ learn how to check the spelling of your email messages
- ✓ learn how to add an attachment to an email message
- ✓ learn how to add importance to email messages
- ✓ learn how to request message receipts
- ✓ learn how to send a message in **Outlook**
- ✓ learn how to create an **AutoSignature** for your email messages
- ✓ learn how to use an **AutoSignature**
- ✓ learn how to remove an unwanted **AutoSignature**
- ✓ learn how to send a courtesy copy to a recipient
- ✓ learn how to send a blind copy of an email.

EMAIL IN OUTLOOK

Outlook mail operations allow you to communicate with users connected to your **computer network** (this is usually the people within your business in the same building) or with

users external to your business or building connected via the **internet**.

Email Accounts

When you communicate with other people using email, your messages and theirs are controlled on a central computer known as a **mail server**. You must have a valid **mail account** to have access to this server. Once the account is set up, you normally gain access to the mail server using a **user name** and a **password**.

Email Accounts and Outlook

Outlook supports both internal and external (or internet) email accounts.

Internal email accounts are normally associated with a computer on your network that is running **Microsoft Exchange Server** – special software created by Microsoft that allows users to send messages to one another over a network of connected computers. Internal email allows you to communicate with people within your organisation. Internal email requires that the internal computers are connected using a **local area network** (LAN). This type of email account is normally used in the workplace to allow colleagues to communicate with one another.

External email accounts connect to other people using the internet. An external email account is set up with an **Internet Service Provider** (ISP). Access to the ISP is gained by connecting using a modem through the telephone line (or a dedicated cable line). Most email connections at home are set up with this type of email account.

In most businesses Outlook is set up for both internal and external email. The internal email is used to communicate with work colleagues, while the external email is used to communicate with customers and suppliers. Both of these email account types work through the LAN which can be configured to provide access to the ISP for specific computers.

Outlook Profiles

Setting up Outlook for use on the appropriate mail servers can be a tedious and sometimes frustrating exercise.

Once the setup has been done and the connections have been established, Outlook stores the settings, together with other relevant information, in a **user profile**. If you have upgraded to Outlook 2016, the settings from the previous profile will be carried forward into the new version.

If you are using Outlook for the first time, you will be asked for information such as your account user name, password and the names of the various mail servers. Your system administrator at work or your ISP when connecting at home will be able to provide this information to you.

Once this information has been provided, it is saved in your Outlook profile and should not need to be changed or entered again unless some change is made to the operation of your computer.

Note: It is assumed for the remainder of this courseware that you have at least one valid, working email account in Outlook 2016.

HOW OUTLOOK MAIL WORKS

Outlook organises your mail into various default folders so that you can quickly and easily find different mail items (such as the **Outbox** which stores sent emails or the **Inbox** which stores

incoming emails). You can also create additional folders to store other categories of emails. For instance you may want to create a **Friends** folder that contains emails from certain friends.

Trays and Folders

Imagine sitting at your desk with two plastic trays in front of you, one labelled **Out** and the other labelled **In**. As you write a message you address it and place it in the **Out** box. Periodically someone comes along, picks up the contents of the **Out** box and takes them to the post office which then distributes the messages to the appropriate recipients. That same person who picks up your mail also places messages sent to you in your **In** box. You can then open these messages and read them or dispose of them into the bin.

Outlook works in the same way, except that the plastic trays are known as folders – in fact there are several more folders than just **In** and **Out**.

In Outlook you **compose** a message and when it is sent it is placed into the **Outbox**. Periodically, Outlook clears the contents of the **Outbox** and sends it to the mail server for delivery to the appropriate recipient. Just so that you have a record of what Outlook has sent, a copy of the message, together with details about when it was sent, is placed into the **Sent Items** folder.

If you are working on a message but you haven't finished it, you can save it as a draft in the **Drafts** folder. You can send it later when you finish it.

When someone sends you a message, it is downloaded from the mail server and placed into your **Inbox**. Here you can read it and when finished you may delete it – in which case, it then goes into the **Deleted Items** folder.

Unlike postal mail you have several other options available to you with incoming mail. Outlook allows you to set up rules for handling incoming mail. For example, you can create a rule that tells Outlook to automatically place incoming messages from a specific sender into a special folder.

Outlook also includes a **junk email** filter that evaluates incoming messages and sends those considered to be spam to the **Junk E-mail** folder, where the messages can be deleted without reading.

Outlook Mail Folders

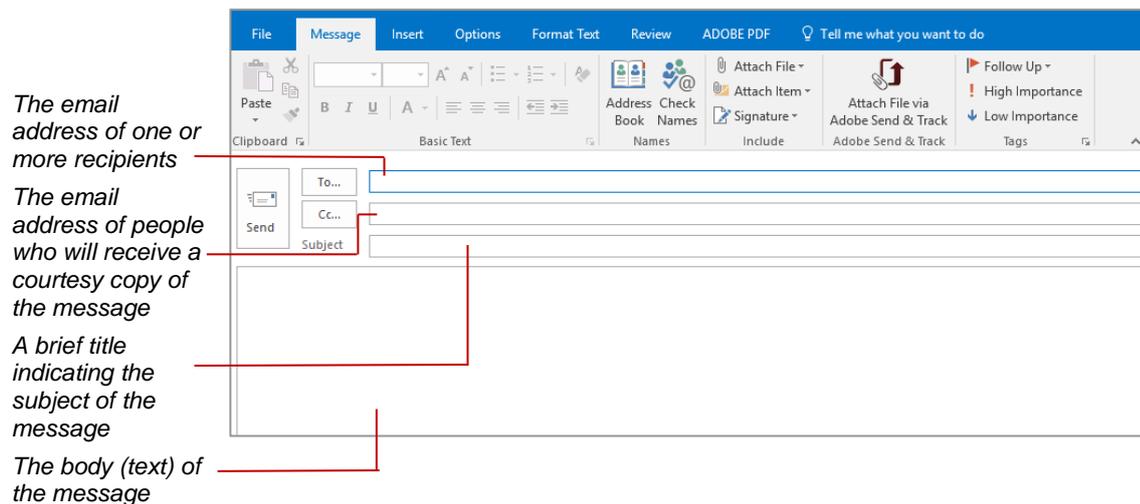
Folder	Mail Direction	Function
<i>Inbox</i>	Incoming	Stores messages that have been sent by other users to your account.
<i>Drafts</i>	Outgoing	Stores messages that you have composed without sending. Messages can be reviewed and sent, or saved as a draft again if required. Once sent the message is moved to the Sent Items folder.
<i>Sent Items</i>	Outgoing	Stores messages that you have sent to other users.
<i>Deleted Items</i>	Both	Stores messages that have been deleted from the other folders. Messages here can be restored to other folders or deleted permanently.
<i>Junk E-mail</i>	Incoming	Captures unsolicited and nuisance emails sent to you – the rules and instructions need to be set up for this before it becomes operational.
<i>Outbox</i>	Outgoing	Stores messages that you have composed for other users but which have not yet been sent by Outlook Mail to the recipient.

COMPOSING AN EMAIL MESSAGE

Most of us learnt how to write letters at school. Email provides us with some new challenges that will need to be learnt. Email, like postal mail, has a recipient, needs to be addressed and can be

signed just like a normal letter. However, while there are similarities between email and postal mail, there are also some key differences and jargon to become acquainted with.

When you tell Outlook that you wish to create a new email message, a window will appear with boxes for the information and details that need to be included in the message.



If you are sending internal email, the recipients in the **To** and **Cc** boxes will need to be members of the internal email server that you are logged onto. It is most likely that these people will have addresses that clearly indicate who they are: e.g. *Jane Doe*, *Bill Kline*, *Fred Bloggs*, *Mary Tink*, etc.

If you are sending internet email then you will need to use the email addresses of the recipients. Email addresses are different to internal email server addresses. They appear with the name of the user and the domain that accesses the server for that user. For example, **bwhite@bigpond.com.au** or **fbloggs@here.co.uk**. The addresses may also be for departments or areas of a business rather than an individual such as **sales@cars.com** or **service@dickson.com**. The @ sign is pronounced **at** when speaking these addresses. For example, **bwhite@bigpond.com.au** would be read as *bwhite at bigpond dot com dot au*.

To send a message you will need to:

1. Enter the message text – this may seem obvious but you can (and sometimes might) send messages without text.
2. Nominate one or more recipients.
3. Provide a subject so that the recipient can quickly work out the gist of your message.
4. Specify the level of importance for the message if required.
5. Add further attachments to the message if required.

Most of these, with the exception of nominating one or more recipients, are optional. For example, you don't have to include a subject – it just makes things easier for the recipient and appears more professional. Similarly, if you don't specify that this is a message of high importance Outlook will give it an ordinary importance status.

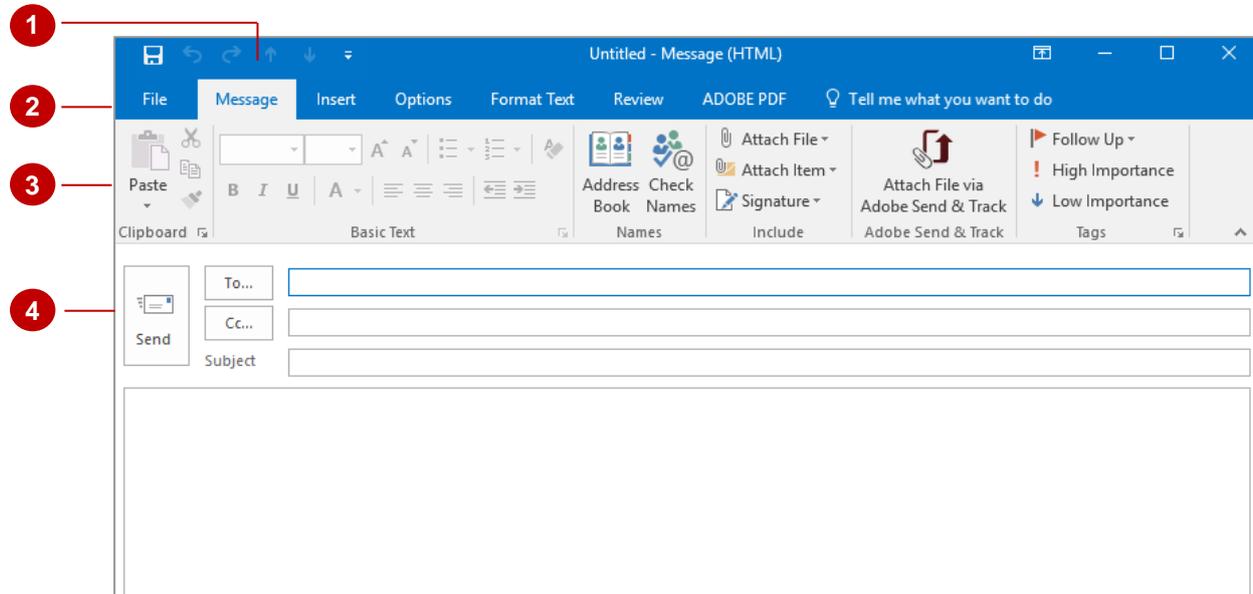
There are also a couple of other subtleties. Unlike normal postal messages, you don't need to worry about putting dates on an email message by the computer. When you send a message the computer records the date and time when it was because the computer does this for you. The date and time when a message arrives in the **Inbox** will be generated sent.

The computer also automatically signals to the recipient that you are the sender. However, it is still considered courteous to sign off an email just the same as if you were sending a postal message.

THE MESSAGE WINDOW

When you are working within a message, you can use the **ribbon** at the top of the message to manage the contents and formatting of your message. You can also use the navigation tools

in the **Quick Access Toolbar** to move through messages and to perform tasks such as **Save** and **Undo**. The **Backstage** can also be accessed via the **File** tab to further manage your messages.



1 The **Quick Access Toolbar (QAT)** appears at the top of the mail message window. It contains frequently-used commands so that you can quickly access them at any time. For example, the **QAT** contains, by default, a button to save the item, undo previous commands, redo commands, find the next item, and find the previous item. Using the **Customise Quick Access Toolbar** icon at the end of the **QAT**, you can easily modify the **Quick Access Toolbar** to add or remove commands as desired.

2 The **File** tab is used to open the **Backstage** where you can print a message and set additional properties for the message.

3 The **ribbon** contains five tabs (in addition to the **File** tab) that can be used to manage, control and format a mail message.

The **Message** tab (as shown in the example above) can be used to apply basic formatting to the message, insert items, set follow-ups, and flag the importance of a message.

The **Insert** tab contains tools that enable you to insert items such as attachments, tables, illustrations, text boxes, WordArt, equations, symbols and lines.

The **Options** tab contains tools that can be used to manage your message, such as whether you want to use voting buttons and tracking features, specify delayed delivery details, set permissions, and so on.

The **Format Text** tab contains all available formatting commands for your mail message, whereas the **Message** tab includes only basic formatting command tools.

The **Review** tab contains tools that let you check a message before sending it, such as the spell checker, thesaurus and word count.

4 The message **header** is where you address your mail message and enter the subject. It can also display information about the message in an **Info Bar**, such as whether or not the message has been sent, if there are any actions that have been specified by the author, and so on. If you have more than one email account (Outlook 2016 supports multiple Exchange accounts within an Outlook profile), Outlook will display an additional field in the header called **From** in which you can select the desired email address.

CREATING A NEW MESSAGE

Mail messages in Outlook can be created from virtually anywhere in Outlook – you don't specifically need to be in the **Mail** feature. A mail message appears in a **Message** window. In this

window you specify the recipient details, the subject and the main text of the message. You can also specify who will receive a courtesy copy (**Cc**) if desired.

Try This Yourself:

Before starting this exercise ensure Outlook has started...

- 1 On the **Home** tab click on **New Email** in the **New** group to open a new message

Let's address the message to ourselves...

- 2 Click on **[To]** to open the Select Names dialog box

Or, type your email address in the white box to the right of [To] then go to step 5...

- 3 Double-click on the desired user name to copy it to the box to the right of **To**

- 4 Click on **[OK]** to insert the name in the field to the right of **To** in the message window

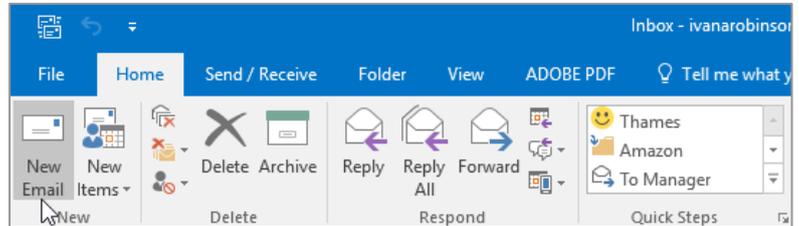
- 5 Click in **Subject** and type **My First Email Message**

If you don't type a Subject and click on [Send], Outlook will display a message asking you to confirm that you meant to leave the Subject blank...

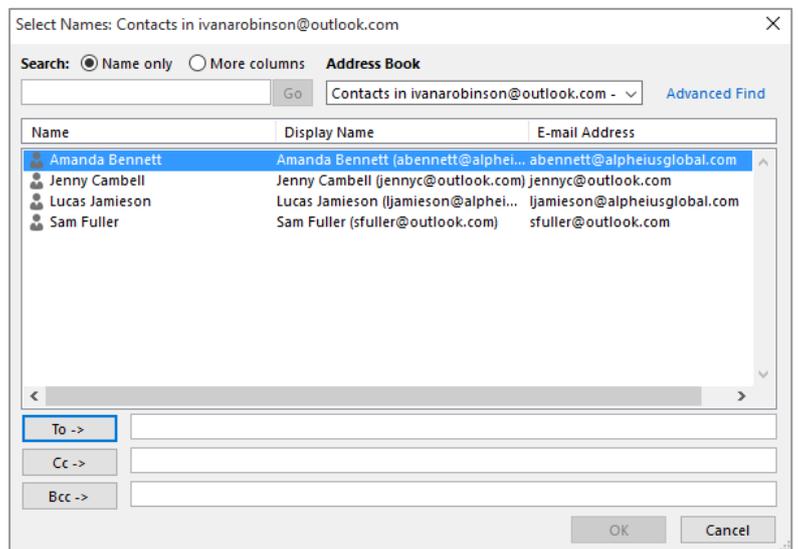
- 6 Click in the large white message box beneath the header and type:

Today I am learning how to send email messages. I am sending it to myself.

Leave open for the next exercise

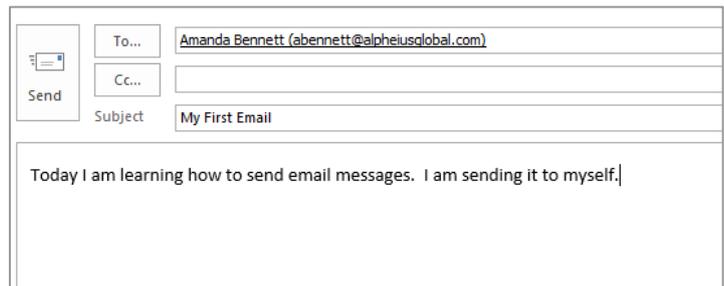


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For Your Reference...

To **create** a **new message**:

1. Click on the **Home** tab, then click on **New Email** in the **New** group
2. Click on **[To]**, select the name and then click on **[OK]**
3. Type the **Subject**
4. Type the message

Handy to Know...

- You can create a new mail message from any Outlook feature by clicking on **New Items** in the **New** group on the **Home** tab and selecting **Email Message**.
- If you click in **To** and begin typing the recipient's email address, Outlook will use AutoComplete to display relevant addresses.

CHECKING THE SPELLING

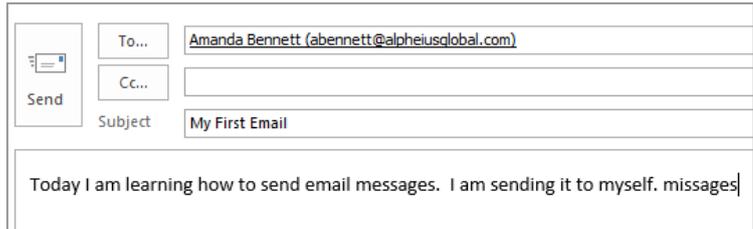
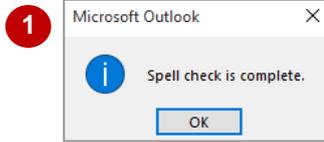
Outlook comes complete with a spell checker that works in the same way as in other applications, offering suggestions where appropriate. The spell checker will not only check the text that you type

in a message, it will also check the Subject text as well. Additionally, you can use the spell checker to check your tasks, meeting requests, appointments and more.

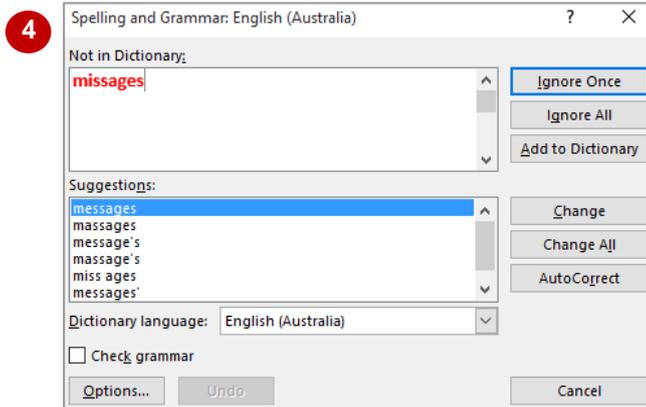
Try This Yourself:

Continue using the previous message with this exercise...

- 1 Click on the **Review** tab, then click on **Spelling & Grammar** in the **Proofing** group to start the spell checker – if there are no errors Outlook will advise you that the spell check is complete
- 2 Click on **[OK]** to close the message box
- 3 Click at the end of the message text, press Space and type **missages** – an obvious spelling error
- 4 Repeat step 1 to re-run the spell checker
This time the error will be found and alternatives will be suggested in the Spelling and Grammar dialog box...
- 5 Click on **missages** under **Suggestions**, then click on **[Change]** to make the change
- 6 Click on **[OK]** to close the message box



3



For Your Reference...

To **check** the **spelling** in a **message**:

1. Click on the **Review** tab
2. Click on **Spelling & Grammar** in the **Proofing** group

Handy to Know...

- Because email messages are often written and sent off quickly, they tend to lack the formality and protocol of a postal message. Nevertheless, you should ensure the spelling is correct before sending the message.

ADDING AN ATTACHMENT TO A MESSAGE

An **attachment** is usually a file that you insert into a message to provide extra information for the recipient. A file attachment could be a picture file, Word document, data file from a spreadsheet

or database, and more. Because it's so common to send a message and forget to attach a file, Outlook will display a message as a reminder if you refer to an attached file in the message.

Try This Yourself:

Continue using the previous message with this exercise...

1 Double-click on **messages** and press **Del** to delete the word, then press **Enter** twice and type **See the attached file. It's a picture of my favourite place.**

2 On the **Message** tab click on **Attach File** in the **Include** group to open a gallery of options

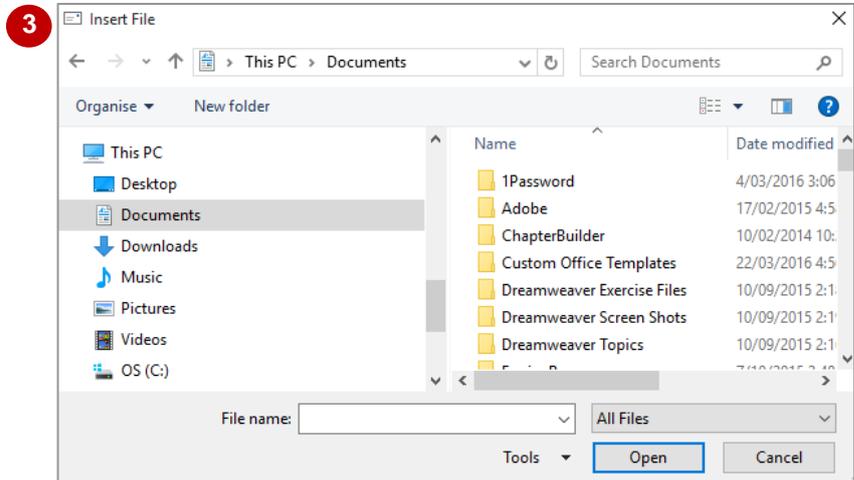
You will also find the **Attach File** command on the **Insert** tab as well as the **Message** tab...

3 Select **Browse This PC** to display the **Insert File** dialog box

4 **Course Files for Microsoft Outlook 2016** folder

5 Click on **uluru.jpg** and click on **[Insert]** to insert the image as an attachment

Notice that an **Attached** field has been added to the bottom of the message header displaying **uluru.jpg**



5 As well as attaching files to an email message, you can also attach other Outlook items, such as messages, contacts or tasks with messages you send. To attach an Outlook item, click on **Attach Item** in the **Include** group and select the appropriate option.

For Your Reference...

To **add** an **attachment** to a **message**:

1. Click on the **Message** tab, then click on **Attach File** in the **Include** group
2. Navigate to the desired folder
3. Click on the file
4. Click on **[Insert]**

Handy to Know...

- If you mention words like **attachment** or **attached** in the body of a message and then send the message without attaching a file, the attachment reminder **MailTip** will display asking whether you've forgotten to attach a file. Although you can choose to not display this message, we don't recommend it!

ADDING IMPORTANCE

Outlook allows you to add **importance** to an email message. All messages have some degree of importance attached to them – unless you specify otherwise, it is set to **normal**. But, if you

feel that your message needs more attention, you can assign high importance to it. By setting the level of importance, you also enable the email recipients to sort messages by importance.

Try This Yourself:

Continue using the previous message with this exercise...

- 1 On the **Message** tab click on **High Importance** in the **Tags** group

The tool will appear highlighted in grey on the ribbon...

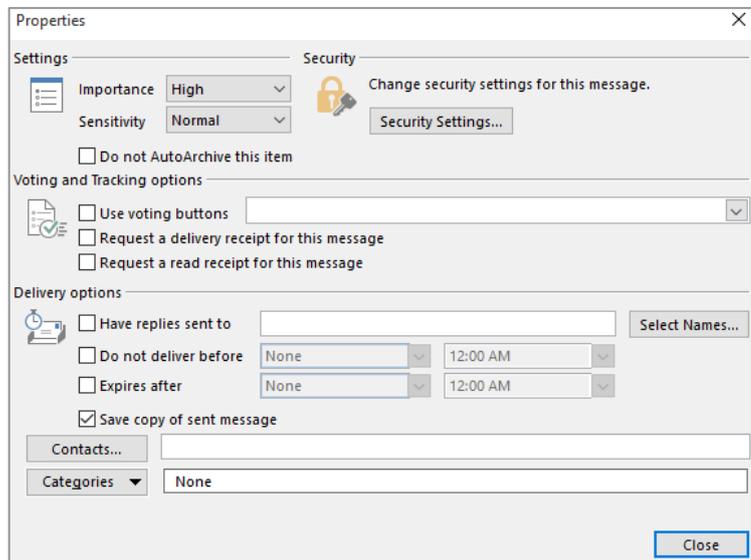
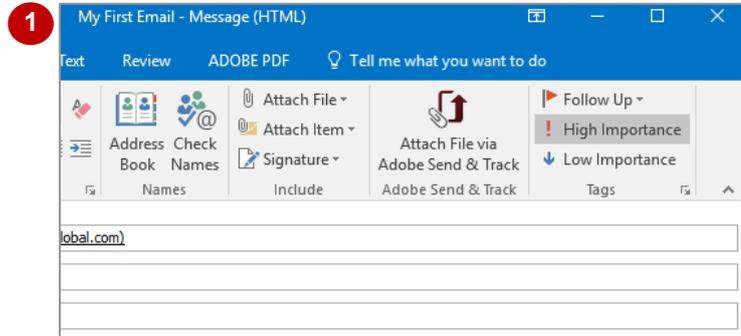
- 2 Click on the **dialog box launcher** icon for **Tags** to open the **Properties** dialog box

There are quite a few settings here that determine how and when your messages will be sent...

- 3 Click on the drop arrow for **Sensitivity** and select **Private**

- 4 Click on **[Close]** to close the **Properties** dialog box

Setting the Sensitivity to Private will display 'Please treat this as Private' in the message header when the recipient opens this message



For Your Reference...

To **change** the **importance** of a **message**:

1. Click on the **Message** tab, then click on **High Importance** in the **Tags** group
2. Click on the **dialog box launcher** icon for **Tags**
3. Set **Sensitivity** as desired and click on **[Close]**

Handy to Know...

- **Sensitivity** options in the **Properties** dialog box are only advisory – they do not force what action the recipient takes.
- Don't overuse the **High Importance** flag. Too much use of this and it will begin to lose its value with your recipients.

REQUESTING MESSAGE RECEIPTS

Just because an email message is sent to someone, it doesn't necessarily mean that they have received or read it. If you want to be sure that a message has arrived and that it has been

opened, you can mark your message so that an electronic **receipt** is generated and sent back to you when your message arrives at the recipient's address.

Try This Yourself:

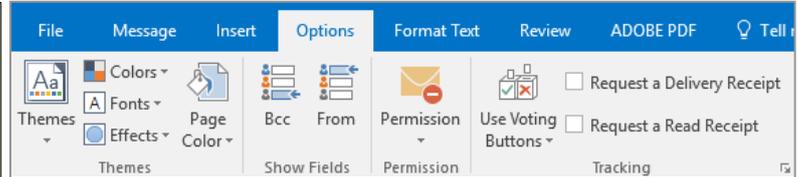
Continue using the previous message with this exercise...

- 1 Click on the **Options** tab
- 2 Click on **Request a Delivery Receipt** in the **Tracking** group so it appears ticked

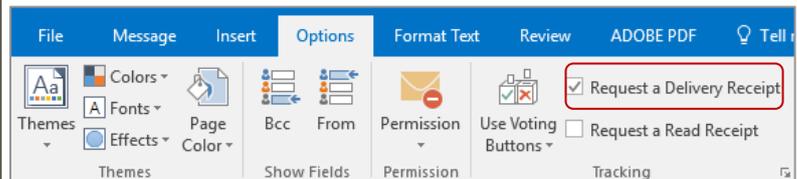
This ensures that a receipt will be sent to you when the message is received by the recipient...

- 3 Click on **Request a Read Receipt** in the **Tracking** group so it appears ticked

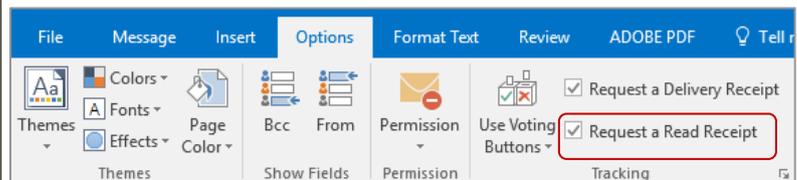
This ensures that a receipt will be sent to you when the message is read by the recipient



1



2



3

For Your Reference...

To **request a message receipt**:

1. Click on the **Options** tab
2. Tick **Request a Delivery** in the **Tracking** group to request a **delivery receipt**, or Tick **Request a Read Receipt** in the **Tracking** group to request a **read receipt**

Handy to Know...

- While read and delivery receipts are useful, they do not guarantee that the person to whom the message was sent was the person who actually opened it and read it. Sometimes, formally requesting a reply from the recipient is a better option.

SENDING THE MESSAGE

Once you have addressed the message, typed the message, added any attachments, and assigned importance and receipts if necessary, you are finally ready to **send** the message. When

you send a message it actually travels through two folders: the **Outbox** where it awaits transmission and the **Sent Items** box where it is saved after it has been transmitted.

Try This Yourself:

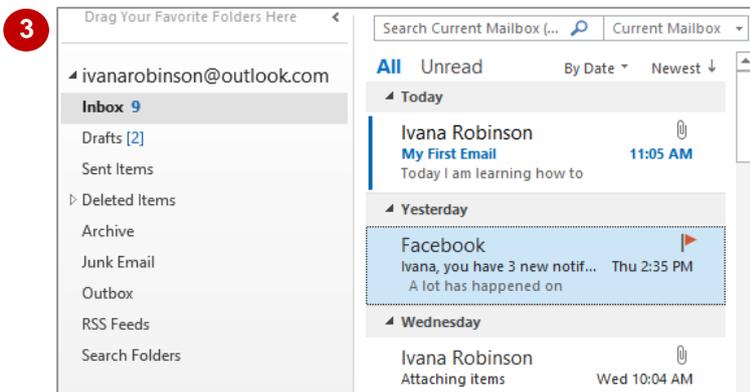
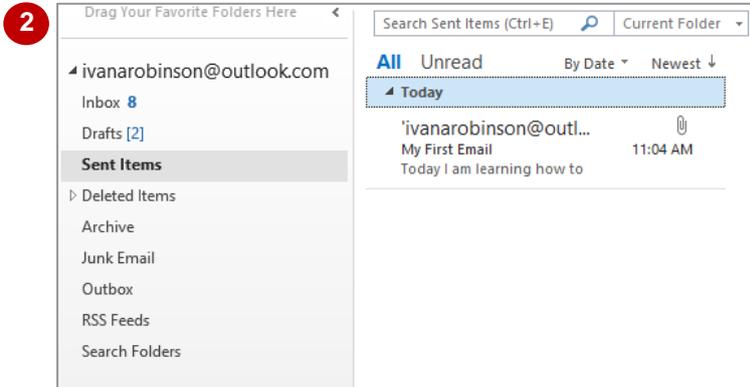
Continue using the previous message with this exercise...

- 1 Click on **[Send]** in the message header to send the message
The message will be placed briefly in the Outbox and sent at the next possible time depending on what other messages are sitting in the queue...

- 2 Click on **Sent Items** in the **Folder** pane to see the mail that has been sent

- 3 Click on **Inbox** in the **Folder** pane to see the incoming mail

Since you addressed this message to yourself it may have arrived already! You may have also received a delivery receipt



For Your Reference...

To **send a message**:

- Click on **[Send]** in the message header

Handy to Know...

- Once a mail message has been sent, it is placed in the **Sent Items** folder. From this folder you can resend the message which can be handy if you forgot to add an attachment to the message, or you can send it to another recipient altogether.

CREATING AN AUTOSIGNATURE

Even though the computer will automatically add your email user name to the email message, it is still deemed to be good practice to **sign off** on your email messages. These sign-offs are like

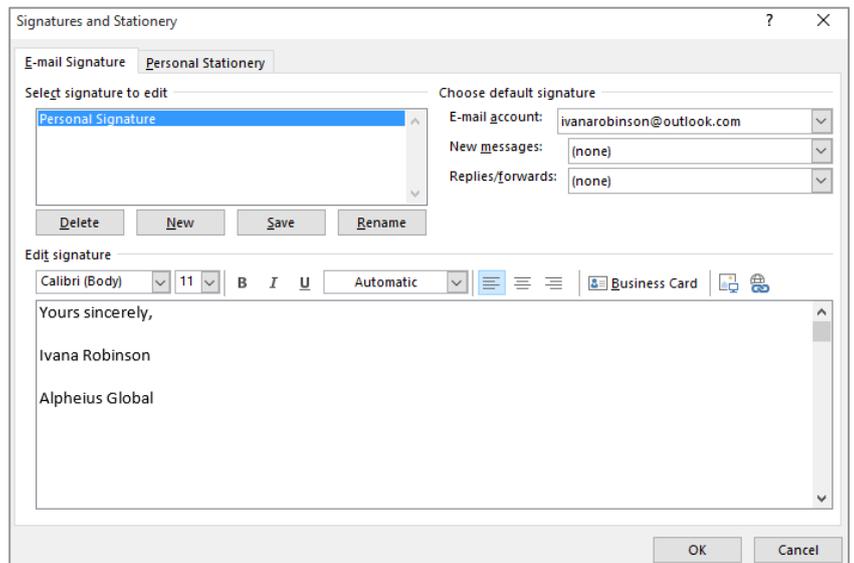
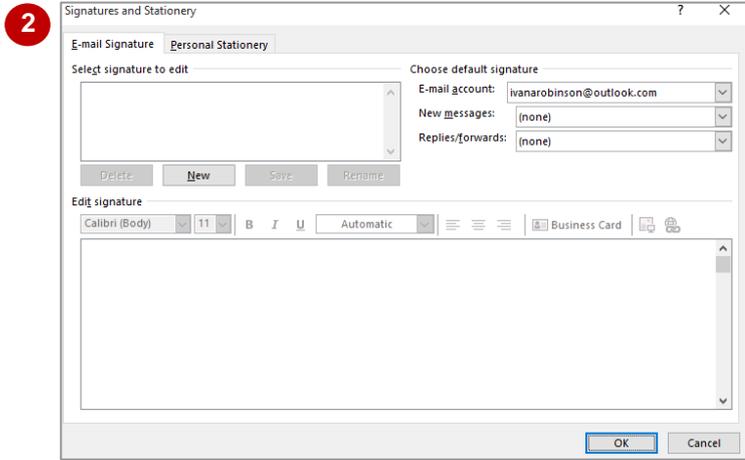
the ones that you would use in a postal letter. You can be formal or informal. Some people also use this as a marketing or advertising opportunity and provide additional text or graphics.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Create a new blank message
- 2 Click on the **Message** tab, click on **Signature** in the **Include** group, then select **Signatures** to open the **Signatures and Stationery** dialog box
- 3 Click on **[New]** to open the **New Signature** dialog box
- 4 Type **Personal Signature**, then click on **[OK]**
- 5 Click in the text box for **Edit signature** and type **Yours sincerely**, press **[Enter]** twice, type your name, press **[Enter]** twice again and type your company's name
- 6 Click on **[OK]** to save your signature and return to the email message, then press **[Esc]** to close the untitled message

Personal Signature will be added to the list in Signature on the Message tab



For Your Reference...

To **create** an **AutoSignature**:

1. Create a new email message
2. On the **Message** tab, click on **Signature** in the **Include** group and select **Signatures**
3. Click on **[New]** and name your signature
4. Type and format your signature text in **Edit signature**, and then click on **[OK]**

Handy to Know...

- Formatting options can be applied to an AutoSignature if you use plain text as your message format. The formatting will not be visible in your outgoing messages, but it will be visible to recipients who use HTML or .rtf message formats.

USING AN AUTOSIGNATURE

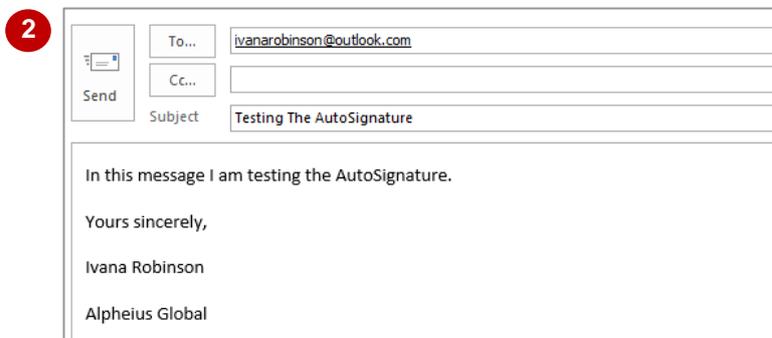
AutoSignatures are applied automatically to all new email messages that you create. Once you have created an AutoSignature and nominated it for new mail messages, it will appear at the

bottom of any new email messages that you create. This is a great time saver if you create many emails a day.

Try This Yourself:

Before starting this exercise ensure you have created an AutoSignature...

- 1 Create a new email message
Notice how the AutoSignature has appeared in the white message box...
- 2 Enter your email address in **To**, type **Testing the AutoSignature** in **Subject** and type **In this message I am testing the AutoSignature.** above the AutoSignature as shown
- 3 Click on **[Send]** to send the message



For Your Reference...

To **use** an **AutoSignature**:

- Create a new email message – the AutoSignature will appear automatically

Handy to Know...

- Although you can create more than one AutoSignature, only one AutoSignature will be set as the default. If you want to insert a different AutoSignature, click on the **Message** tab, click on **Signature** and select the desired signature from the list of signatures.

REMOVING AN AUTOSIGNATURE

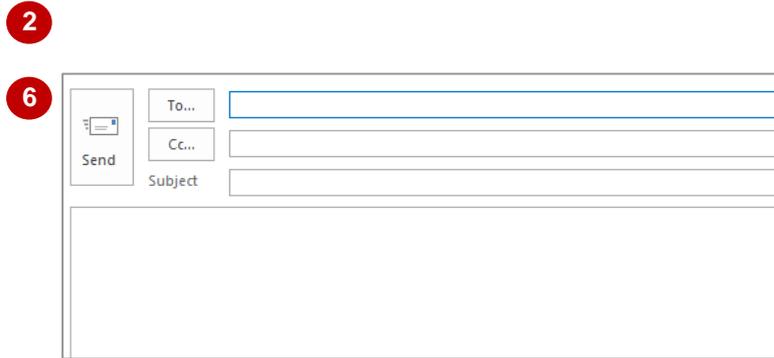
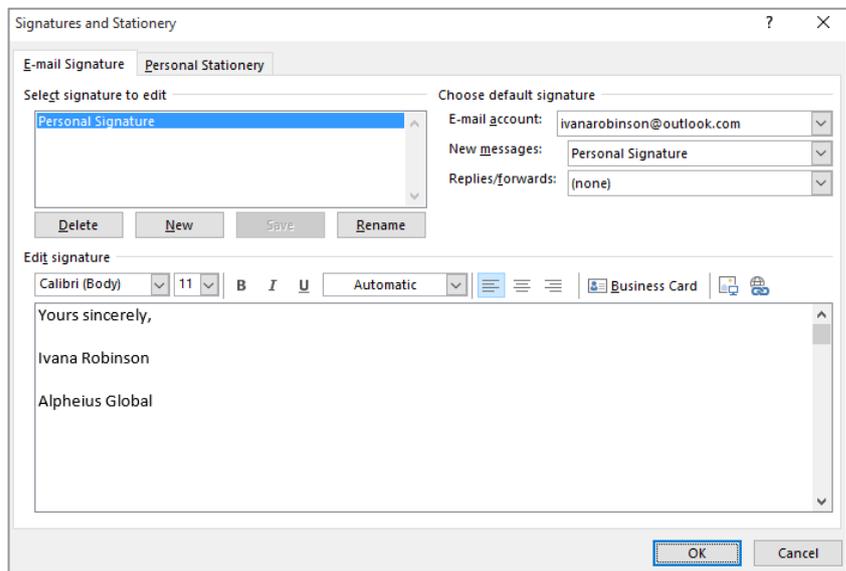
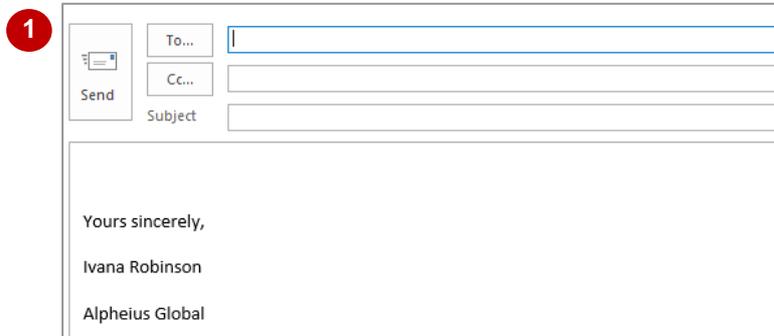
Outlook lets you have multiple **AutoSignatures**. For example, you may create one for formal business emails, another for personal emails, and perhaps several different ones for the

various roles or jobs that you perform in your organisation. To ensure that the list of available AutoSignatures doesn't get out of hand, you can remove unwanted signatures.

Try This Yourself:

Before starting this exercise ensure you have created an AutoSignature...

- 1 Create a new email message
- 2 On the **Message** tab, click on **Signature** in the **Include** group and select **Signatures** to open the **Signatures and Stationery** dialog box
- 3 Ensure that **Personal Signature** is selected under **Select signature to edit**, then click on **[Delete]**
You will be asked to confirm the deletion...
- 4 Click on **[Yes]** to confirm the deletion
- 5 Click on **[OK]** to close the **Signatures and Stationery** dialog box, then press **[Esc]** and click on **[No]** to close the email message without saving it
- 6 Create a new mail message
Notice that the AutoSignature has not automatically been inserted into the message...
- 7 Press **[Esc]** to close the email message



For Your Reference...

To **remove** an **AutoSignature**:

1. Create a new email message
2. On the **Message** tab, click on **Signature** in the **Include** group and select **Signatures**
3. Select the signature and click on **[Delete]**
4. Click on **[OK]**

Handy to Know...

- You can access the **Signatures and Stationery** dialog box from a new message by clicking on **Signature** in the **Include** group on either the **Message** or **Insert** tab.

SENDING A COURTESY COPY

With normal postal letters, it can be time consuming to send additional copies of a letter to someone else. You need to photocopy the letter, create a new envelope and spend just as much

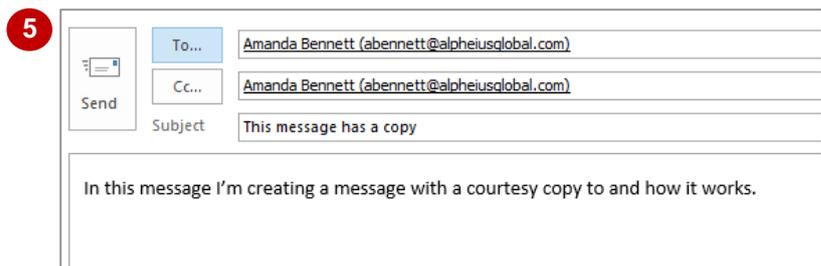
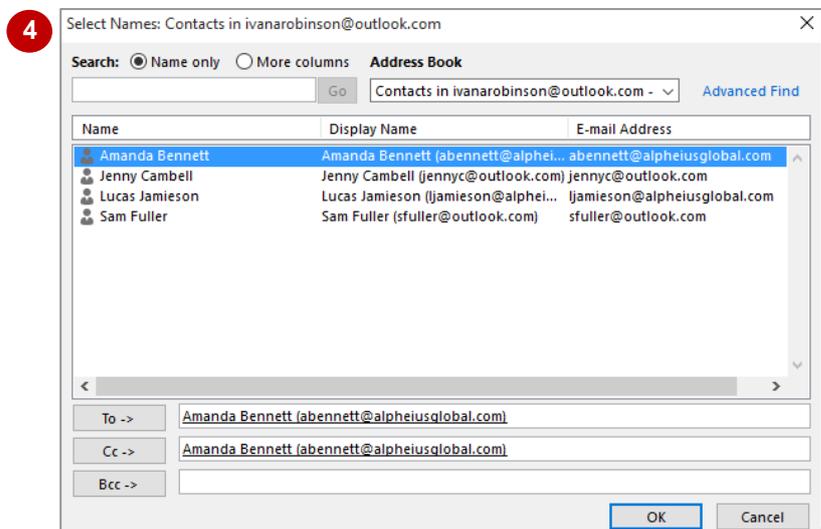
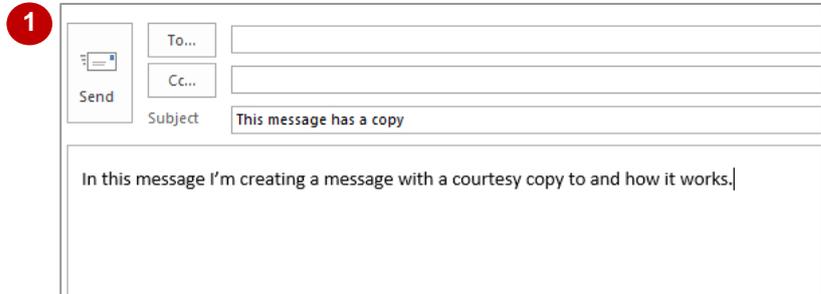
time and effort as you did on the original. But with email, you can send a copy of a message to another person simply by inserting their email address in the **Cc (Courtesy Copy)** field.

Try This Yourself:

Before starting this exercise ensure Outlook has started...

- 1 Create a new message, then type **This message has a copy** in **Subject** and type **In this exercise I'm creating a message with a courtesy copy to see how it works.** in the message box, as shown
- 2 Click on **[To]** to open the **Select Names** dialog box
- 3 Click on the desired user under **Name**, then click on **[To]**
- 4 Ensure that the same name is selected, then click on **[Cc]**
- 5 Click on **[OK]** to return to the message
The same name will appear in both To and Cc...
- 6 Click on **[Send]** to send the message

After a few moments the message will appear in your Inbox. If you click on it you will see that your name appears in both To and Cc



For Your Reference...

To **send a courtesy copy**:

1. Create a new message, then click on **[To]**
2. Select the recipient and click on **[To]**
3. Select the recipient for the courtesy copy and click on **[Cc]**
4. Click on **[OK]** and then click on **[Send]**

Handy to Know...

- When you are creating a new email message, you can open the **Select Names** dialog box by clicking on either **[To]** or **[Cc]** in the new message window.

SENDING A BLIND COPY

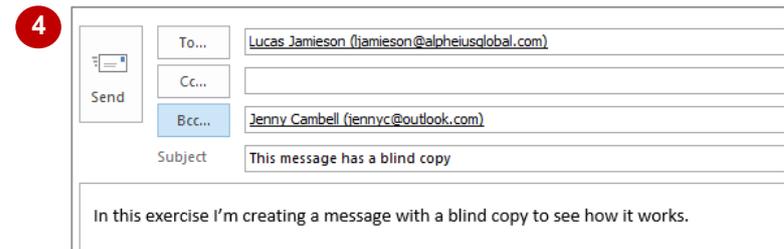
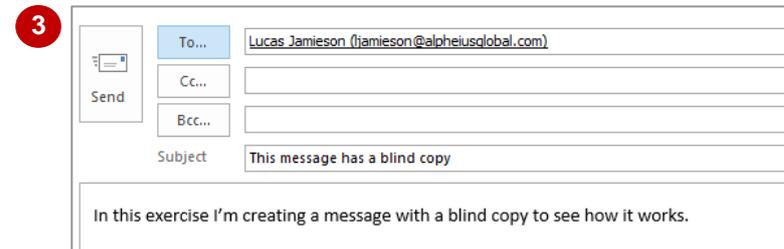
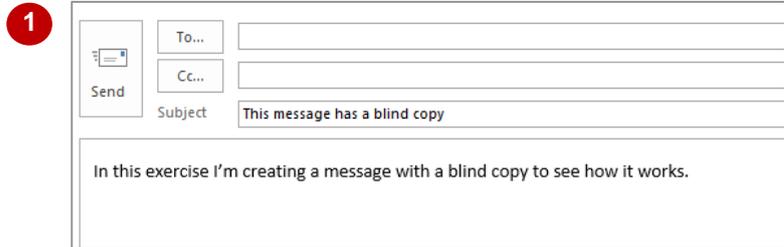
When a recipient receives an email that has also been sent to others as a courtesy copy, the main recipient can see exactly who has received a copy of the email in the **Cc** field. But if you wish

to send a copy of an email to another person without the main recipient being aware of this fact, you can send the message as a **blind copy**. The **Bcc** field will not appear in the main message.

Try This Yourself:

Before starting ensure Outlook has started...

- 1 Create a new message, then type **This message has a blind copy** in **Subject** and type **In this exercise I'm creating a message with a blind copy to see how it works.** in the message box, as shown
- 2 Click on **[To]**, double-click on the desired name to insert it into **To**, then click on **[OK]**
- 3 Click on the **Options** tab, then click on **Bcc** in the **Show Fields** group
The Blind Copy (Bcc) field will appear in the message header...
- 4 Click on **[Bcc]**, double-click on the desired name, then click on **[OK]**
You will receive a blind copy of the email...
- 5 Click on **[Send]** to send the message
You must turn off Bcc...
- 6 Create a new message, repeat step 3 to deselect **Bcc**, then press **[Esc]** to close the message



For Your Reference...

To **send a blind copy** of an **email**:

1. Create a new message
2. Click on the **Options** tab, then click on **Bcc** in the **Show Fields** group
3. Type the blind copy recipient in **Bcc**

Handy to Know...

- You can add a blind copy recipient by clicking on **[To]** or **[Cc]** in the header area of a message. You can then add recipient names to **Bcc** in the **Select Names** dialog box. When you close this dialog box, the **Bcc** field will appear in the header of the email.

CHAPTER 3 RECEIVING EMAIL

InFocus

Email messages are received in the Outlook **Inbox** in much the same way as letters are received in a letterbox. These messages can be made to appear here automatically or upon request. You'll probably spend a fair proportion of your time with Outlook in the **Inbox** dealing with new messages as they arrive.

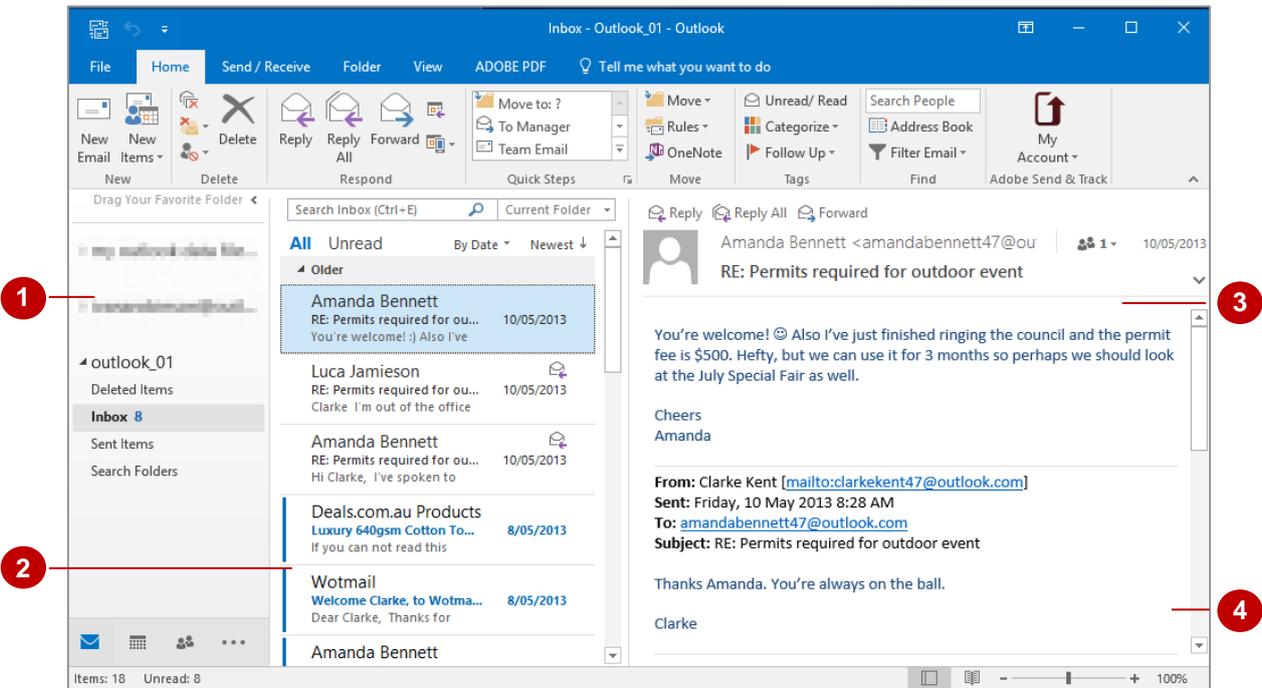
In this session you will:

- ✓ gain an understanding of the **Inbox**
- ✓ learn how to retrieve email from the mail server
- ✓ learn how to open another data file in **Outlook**
- ✓ learn how to adjust the message view
- ✓ learn how to quickly preview messages in the message list
- ✓ learn how to arrange messages in the message list
- ✓ learn how to read email messages
- ✓ learn how to open multiple messages at once
- ✓ gain an understanding of conversation view
- ✓ learn how to navigate conversations
- ✓ learn how to reply to a message
- ✓ learn how to reply to a message in a conversation
- ✓ learn how to reply to all recipients of a message
- ✓ learn how to reply to a message without including the original message text
- ✓ learn how to add comments to reply messages
- ✓ learn how to nominate a different email address for replies to a specific message
- ✓ learn how to forward messages
- ✓ learn how to find related messages
- ✓ learn how to ignore conversations
- ✓ learn how to mark messages as being unread
- ✓ gain an understanding of clutter.

UNDERSTANDING THE INBOX

When you receive an email message, it normally appears in the **Inbox**. Once mail arrives you can read, delete and print it, move it to another folder, and more, using the various tools provided in

Outlook. The default Mail screen comprises two main panes (**Message** list and **Reading** pane) but you can configure it to show additional information as desired to ensure that it best suits your needs.



- 1 The **Folder pane** (optional) displays a list of folders making it easy for you to view the contents of the **Inbox**, **Sent Items** or **Outbox**. To view these folders you simply click on the one that you want to view. By default, the **Folder pane** is minimised but we've shown it expanded in the example above.
- 2 The **Message list** displays all messages in the selected folder. For example, the **Inbox** message list displays incoming messages. Unread messages appear in bold blue with a blue bar to the left of the message as shown in the example. This helps you to quickly identify which messages need to be read.
- 3 The **Reading pane** (optional) displays the contents of the message currently highlighted (or selected) in the message list. The **Reading pane** allows you to read the contents of a message without having to open the message in its own window.
- 4 The **To-Do bar** (not shown above) allows you to display forthcoming appointments (Calendar peek), favourite contacts (People peek), and tasks and emails flagged for follow up (Tasks peek). By default, the **To-Do bar** is switched off, but you can open it choosing which of these three peeks to include. When open, the **To-Do bar** is docked to the right side of the window.

RETRIEVING EMAIL

All email messages must pass through a mail server – the email equivalent of a post office. With most computers a call is periodically made to the server to see if there is any mail for you. If

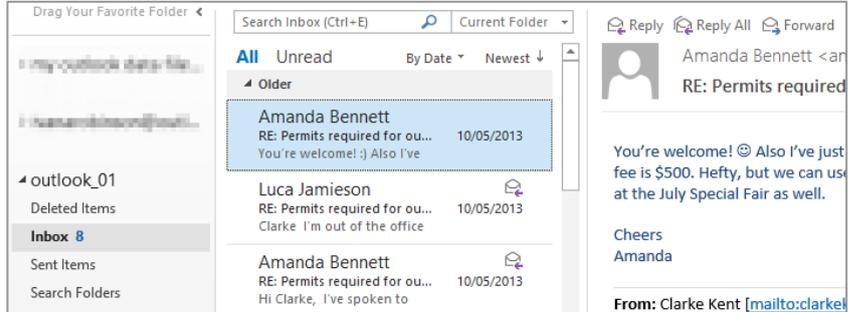
you are waiting to receive a message, you can force your computer to check the server rather than waiting for it to do it of its own accord and any incoming messages will be added to your **Inbox**.

Try This Yourself:

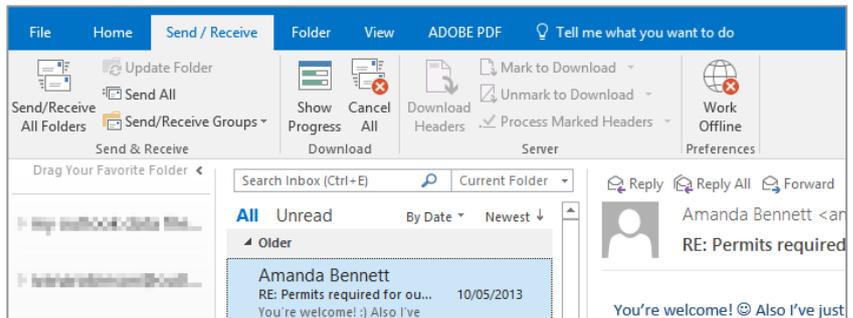
Before starting this exercise ensure Outlook has started...

- 1 Click on **Mail** in the **Navigation** bar to open the **Mail** feature
- 2 If necessary, click on **Expand the Folder Pane** to ensure that the **Folder** pane is expanded
- 3 Click on **Inbox** to open this folder if it is not already open
- 4 Click on the **Send / Receive** tab
- 5 Click on **Send/Receive All Folders** in the **Send & Receive** group

Any messages addressed to you on the various mail servers will be delivered to you, and any messages in your Outbox will be sent to the mail server(s) for delivery



1



4

For Your Reference...

To **manually retrieve email**:

1. Open the **Mail** feature
2. Click on the **Send / Receive** tab
3. Click on **Send/Receive All Folders** in the **Send & Receive** group

Handy to Know...

- You can quickly retrieve and send email by clicking on the **Send/Receive All Folders** tool in the **Quick Access toolbar** or by pressing **F9**.

OPENING AN OUTLOOK DATA FILE

All of the tasks you perform in Outlook are stored in a **data file** – this data file is organised into folders to help you manage the contents. The default data file and its folders appear at the top

of the **Folder** pane under your email address. You can, however, open and work with other data files.

Try This Yourself:

Before starting ensure the Mail feature is open in Outlook.

Special Note: You normally don't open data files in Outlook (other than backup files). We are doing this only so that you have some practice messages and data to work with on this course...

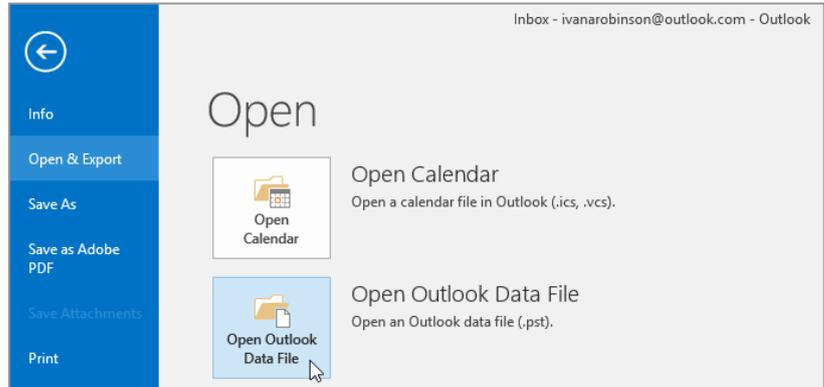
- 1 Click on the **File** tab, click on **Open & Export**, then click on **Open Outlook Data File**

The Open Outlook Data File dialog box will open pointing to the default folder where data files are saved:
 \Documents\Outlook Files...

- 2 Navigate to the **Course Files for Microsoft Outlook 2016** folder, click on **Outlook_01.pst** then click on **[OK]** to open the data file in the **Folder** pane

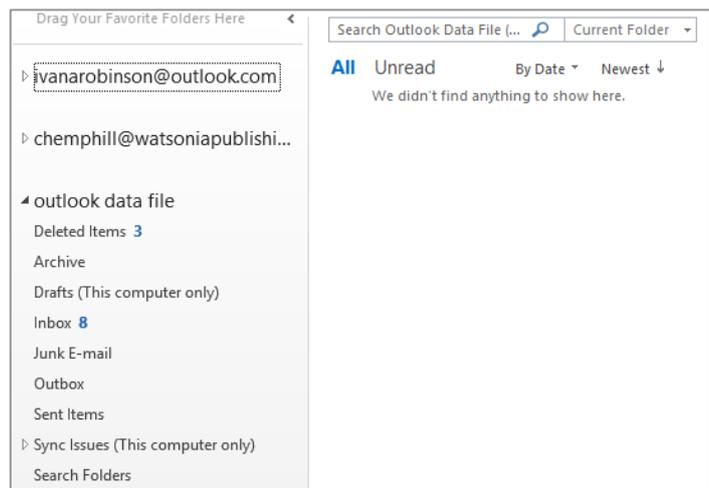
- 3 Click on the black **collapse** icon  to the left of the original data file (located beneath the **Favourite Folders** near the top of the pane), then click on the **expand** icon  for **Outlook_01**

- 4 Click on **Inbox** to see the messages stored in this folder



1

3



For Your Reference...

To **open a data file** in **Outlook**:

1. Click on the **File** tab to open the **Backstage**
2. Click on **Open & Export**
3. Click on **Open Outlook Data File**
4. Select the data file and click on **[OK]**

Handy to Know...

- When you open a second Outlook data file you will have access to two **Inboxes**. However, Outlook will still deliver all incoming mail to the default **Inbox** designated for receiving mail – this is usually the one associated with your personal data file.

ADJUSTING THE MESSAGE VIEW

You can change the layout of the Mail screen for each folder using the **Change View** command. For instance, you might choose **Preview** view for your **Inbox** as this view closes the **Reading** pane

but previews one line of the message in the large message list. For your other Mail folders you might retain the default **Compact** view which displays the message list and **Reading** pane.

Try This Yourself:

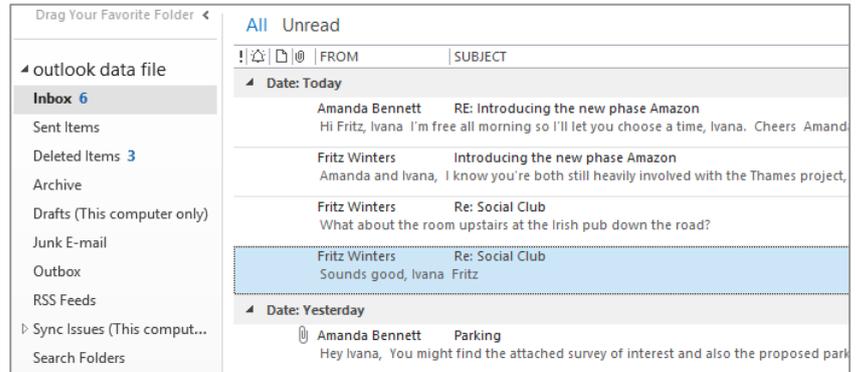
Continue using the previous file with this exercise...

- 1 Click on the **View** tab to see the view commands
- 2 Click on **Change View** in the **Current View** group and click on **Preview**

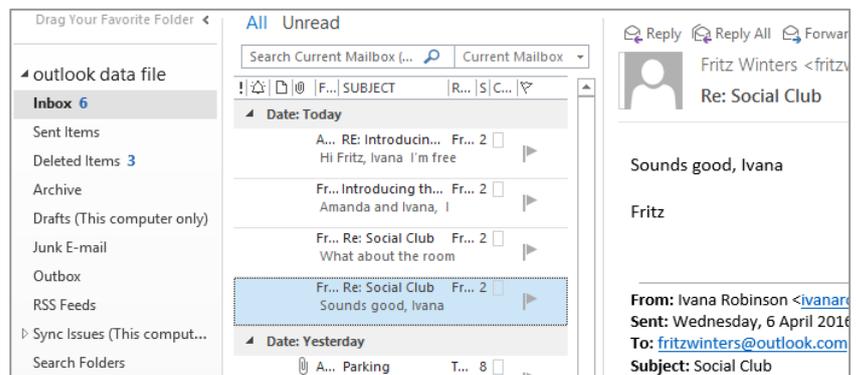
The **Reading** pane will close and the message list will increase in size. A one-line preview of each message will display beneath the **Sender** and **Subject**...

- 3 Click on **Change View** again, then click on **Single**
- The **Reading** pane will re-open. In this view, the message list shows the **Sender** and **Subject** combined in a single line with a short one-line preview of the message below. This view is ideal when you receive many messages...

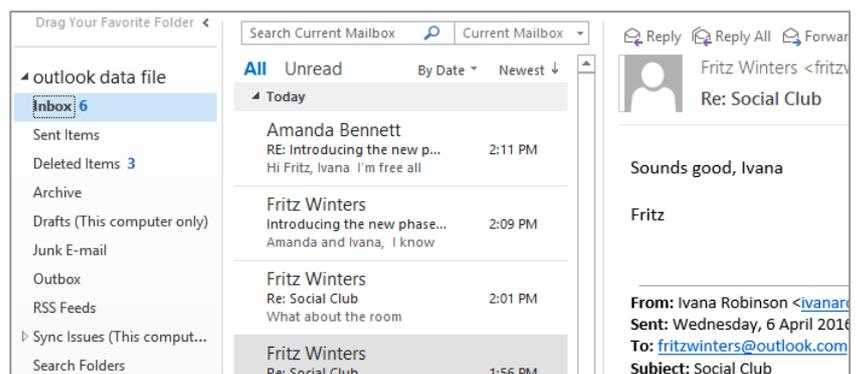
- 4 Click on **Change View** again, then click on **Compact**
- The **Sender**, **Subject** and one-line preview display on separate lines in each message in the message list and the **Reading** pane is open



2



3



4

For Your Reference...

To **adjust** the **view** of a **specific Mail folder**.

1. Click on the folder in the **Folder** pane, then click on the **View** tab
2. Adjust **Change View** in the **Current View** group as desired
3. Display, minimise or close panes as needed

Handy to Know...

- The default view for each folder in Mail (**Inbox**, **Sent Items**, etc) is **Compact** view with **Message Preview** set to **1 Line**.
- Most email viruses can't spread unless you open the message. Now, however, some viruses can spread via the **Reading** pane. This makes **Preview** view a good option.

PREVIEWING MESSAGES

By default, a preview of the first line of a message appears in the message list. This preview is known as **AutoPreview**. You can adjust the message list so that up to three lines

from each message will be previewed. This means you can easily preview your messages in the message list without having to open them or even read them in the **Reading** pane.

Try This Yourself:

Continue using the previous data file with this exercise...

- 1 Click on the **View** tab, then click on **Message Preview** in the **Arrangement** group to display a menu of options

By default, one line of text will display...

- 2 Select **3 Lines**
A message box will display...

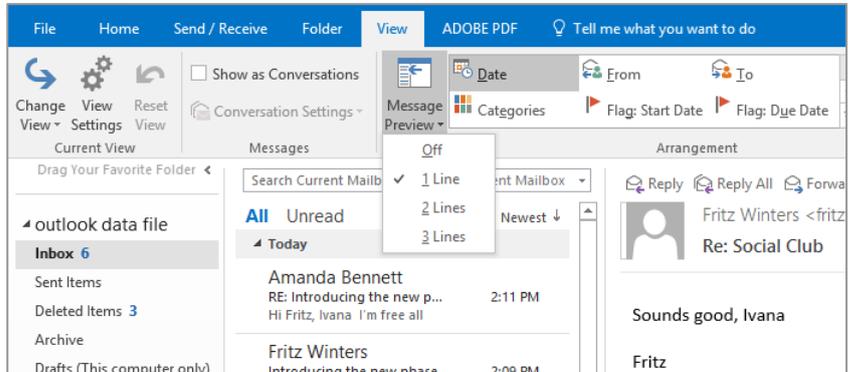
- 3 Click on **[This folder]** to apply the change only to the **Inbox**

Notice that you can read several of the messages in their entirety. You can turn off AutoPreview if desired...

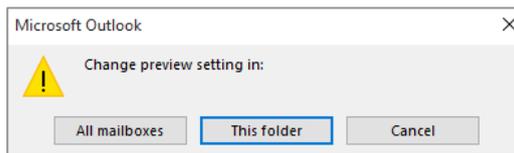
- 4 Repeat steps 1 to 3 selecting **Off** to turn off **AutoPreview**

Notice that many more messages fit in the same space. Let's reapply the default setting...

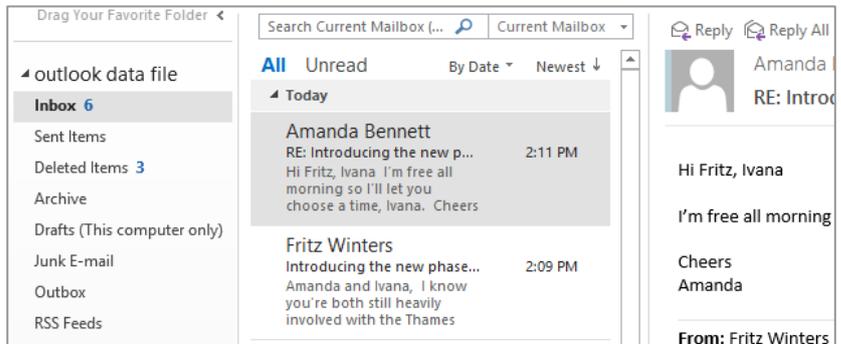
- 5 Repeat steps 1 to 3 selecting **1 Line** to display only one line of text from each message in the message list



1



2



3

For Your Reference...

To **preview messages**:

1. Click on the **View** tab
2. Click on **Message Preview** in the **Arrangement** group
3. Select the desired option

Handy to Know...

- If space is an issue, you might find it best to turn off **AutoPreview** altogether.

ARRANGING MESSAGES

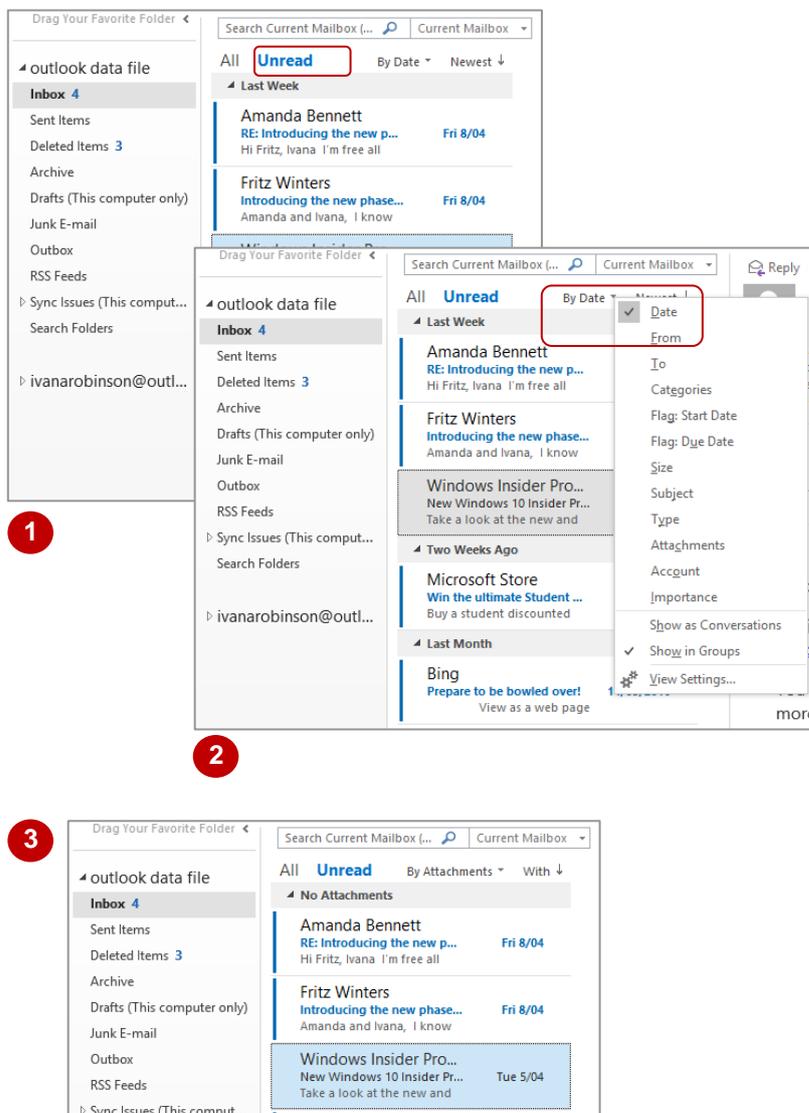
You can use the filter at the top of the message list to show unread or all emails. You can then sort these messages by sender, date received, subject, and more. Once the messages have

been arranged they can be further organised into groups. By grouping the messages, you can then expand or collapse the groupings to help you better organise and manage your messages.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Click on **Unread** below the Search box to display only unread messages
This makes it easy to tackle new messages. They're currently sorted By Date with the Newest on top. Let's change this...
- 2 Click on the drop arrow to the right of **By Date**, as shown, to display a menu
- 3 Ensure that **Show in Groups** is ticked, then select **Attachments** to group the messages by those with or without attachments
- 4 Click on **All** below the Search box to display all messages, still grouped by **Attachments**
- 5 Repeat step 2 to arrange all messages by date again



For Your Reference...

To **arrange messages**:

1. Click on **All** or **Unread** in the message list
2. Click on the drop arrow to the right of **By Date** and select the desired option, or Click on the **View** tab, then click on **Arrange By** in the **Arrangement** group and select the desired option

Handy to Know...

- If **Show in Groups** is not ticked, the messages will simply be listed in order by the sorting criteria, such as by sender. When **Show in Groups** is ticked, Outlook will group each category under an appropriate group heading.

READING MESSAGES

Email messages are just like paper-based messages and will need to be read. Messages in Outlook can be read using the **Reading** pane. When the message is selected in the **Message**

list, its content will appear in the **Reading** pane. Outlook messages can also be opened and read in a separate window.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 Ensure the **Inbox** is selected so that you can see the messages you've received

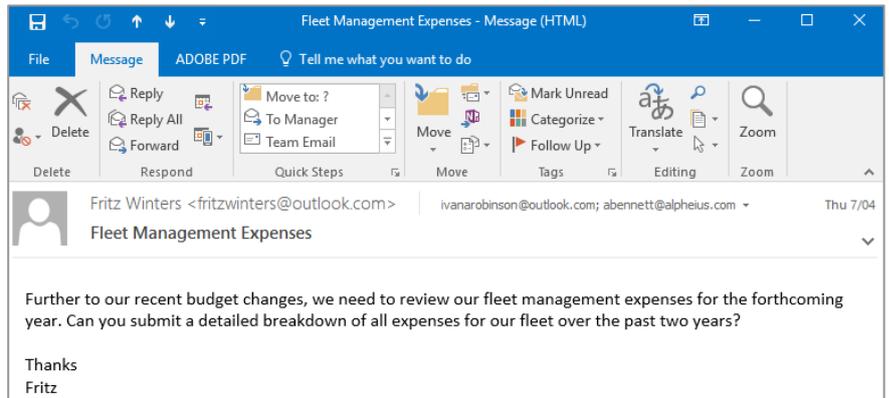
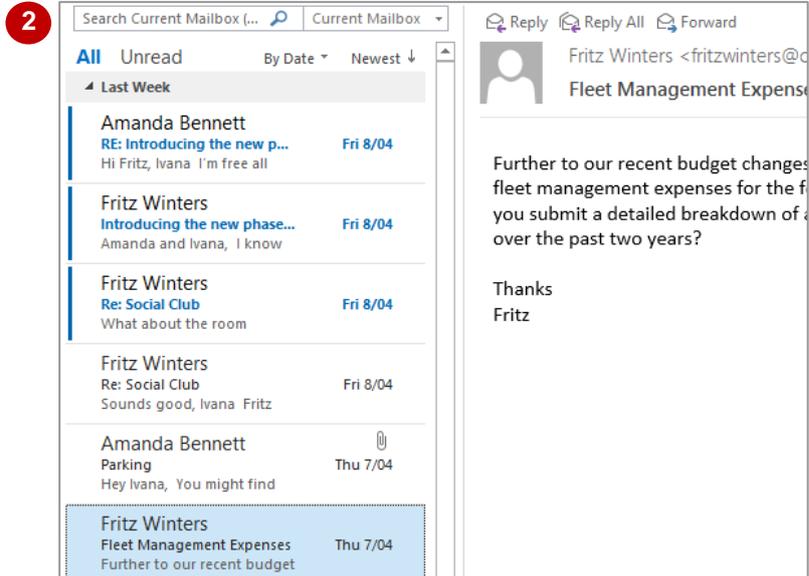
Unread messages appear with a bold subject and a blue vertical bar in the message list...

- 2 Click on the message from **Fritz Winters** with the **Fleet management expenses** subject to display it in the **Reading** pane to the right of the screen

- 3 Double-click on the same message in the message list to open it in its own window

- 4 Click on **Close** to close the message window

You can also press Esc to close the active message window



For Your Reference...

To read messages:

- Click on the message to display it in the **Reading** pane (if it is open), or
- Double-click on the message to open it in its own window

Handy to Know...

- You can set up Outlook so that when you read a message in the **Reading** pane, the bolding disappears from the message in the message list when you click on another message. Click on **Reading Pane (View tab)**, select **Options** and tick **Mark items as read when viewed in the Reading Pane**.

OPENING SEVERAL MESSAGES

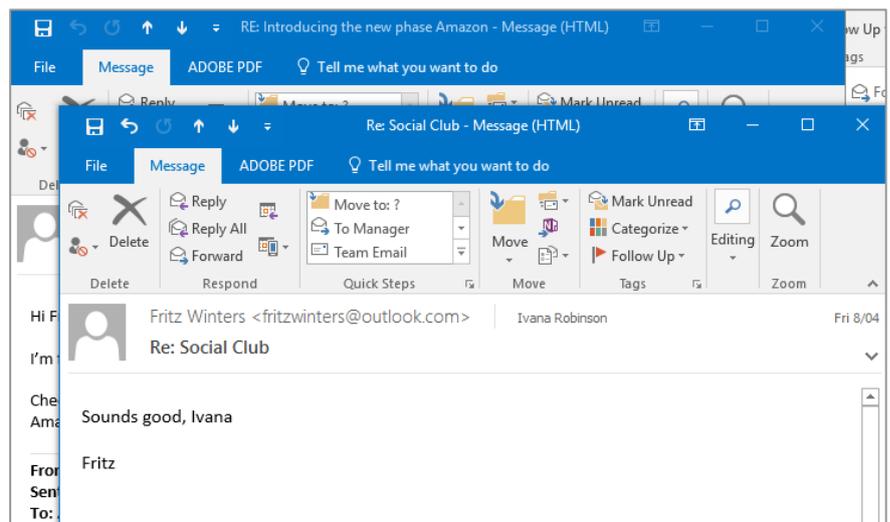
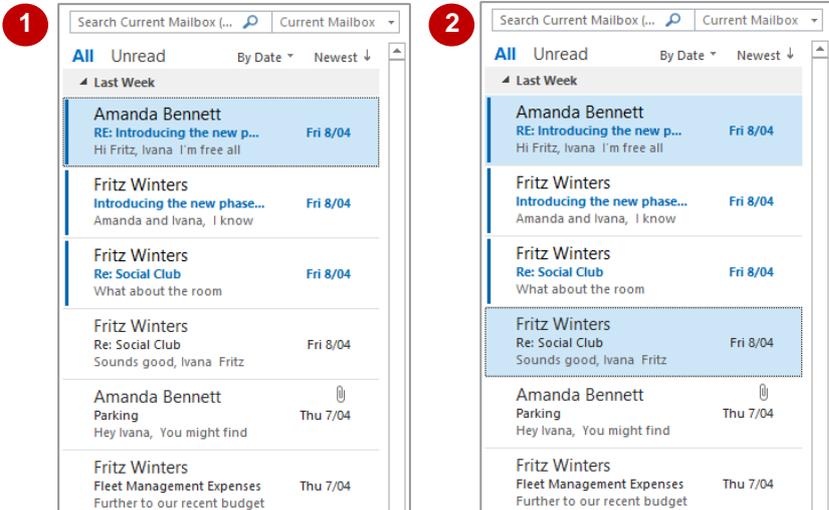
Outlook lets you open more than one message at a time. For example, you can double-click on a message in your **Inbox** and once it opens in a window of its own, you can return to the **Inbox**

again (or any other Mail folder) and open another message. You can repeat this process for as many messages as you want opened. Alternatively, you can open the desired messages simultaneously.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Click on any message in the message list to select it
 - 2 Press and hold down **Ctrl** and click on another message to select it as well
 - 3 Right-click on one of the selected messages in the message list and select **Open**
- Both mail messages will open in separate windows...*
- 4 Close the two open messages



3

For Your Reference...

To **open several messages**:

1. Click on a message, press and hold down **Ctrl** and click on other messages as desired
2. Right-click on one of the selected messages and select **Open**

Handy to Know...

- You can use a keyboard shortcut to open several selected messages. The keyboard shortcut is **Ctrl** + **O**.
- If you have opened several messages, you can close them in one go by returning to the **Inbox**, clicking on the **View** tab and clicking on **Close All Items** in the **Windows** group.

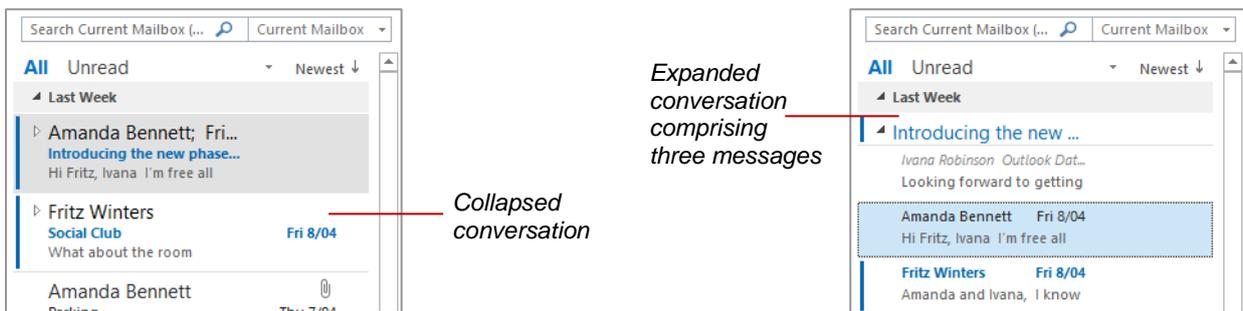
UNDERSTANDING CONVERSATION VIEW

When **Conversation view** is turned on (and it isn't by default), messages that share the same subject are organised by date and grouped under the one conversation header message in the

message list. In other words, if you send a message to someone and they reply to it and then you reply again, these three messages will be grouped and listed in the one conversation.

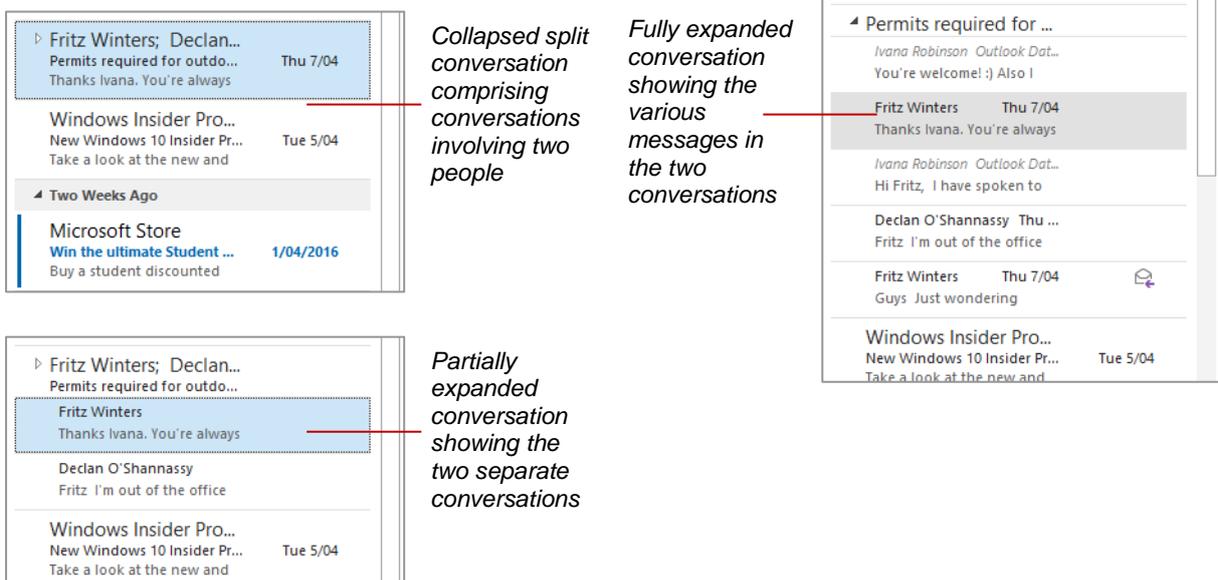
When **Conversations** is turned on, you can identify a conversation in the message list by the presence of an expand icon ▸ to the left of the message.

Each conversation can be expanded or collapsed. You expand a conversation by clicking on the expand icon ▸ to see all messages in the conversation. Notice in the example below that some messages are stored in the **Inbox** while others are located in the **Sent Items** folder – it doesn't matter in which folder they are located, Outlook still maintains the relationship. Any unread messages in a conversation will appear with a blue line and a bold blue subject. (Note that if you turn off **Conversations**, only the messages stored in the **Inbox** will appear in the message list – you would have to click on **Sent Items** to see the related messages that you have sent.)



The messages within each conversation are sorted with the newest message on top. When you click on a conversation header in the message list, the conversation will appear in the Reading pane with the newest message on top. Because all messages in the conversation thread are included, you can very quickly and easily read the entire conversation. When you receive a new message that relates to one of your conversations, the entire conversation will move to the top of the message list. The conversation header will appear with a bold heading and the count of unread messages will appear in brackets next to the subject.

If a specific message gets two or more responses, Outlook will **split** the conversation into multiple related but separate conversations, as shown below. The latest message in each split will appear in the Reading pane when you click on the separate conversation in the partially expanded conversation (see the bottom left image below) in the message list. You can fully expand the conversation (as shown below to the right) by clicking on the expand icon a second time.



NAVIGATING MESSAGES IN A CONVERSATION

When you turn on the **Conversation** feature, Outlook groups all messages with the same subject as a conversation. You can expand a conversation to view its messages and then

collapse it again when you're finished. Using the **Conversation** feature helps you organise your **Inbox** so that it is not so cluttered by grouping together and then collapsing related messages.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Click on the **View** tab, then click on **Show as Conversations** in the **Messages** group
A message box will display...
- 2 Click on **[This folder]** to convert only the **Inbox** to conversation view
Conversations are identified by an expand icon ▶...
- 3 Scroll down to and click on the conversation from **Fritz** with the **Social Club** subject to display the entire conversation in the **Reading** pane
Let's expand it...
- 4 Click on the expand icon ▶ for this conversation in the message list to display all messages in this conversation
- 5 Click on the collapse icon ▲ for this conversation to collapse it
- 6 Click on the conversation immediately above to display it in the **Reading** pane, then click on the expand icon ▶ to see the messages in this split conversation
- 7 Click on each message in the message list to see the conversation in the **Reading** pane

1 Microsoft Outlook dialog box: Show messages arranged by conversations in: [All mailboxes] [This folder] [Cancel]

2 Outlook interface: [This folder] button selected in the Messages group.

3 Outlook interface: Conversation expanded in the Reading pane.

4 Outlook interface: Conversation collapsed in the Reading pane.

5 Outlook interface: Conversation expanded in the Reading pane.

6 Outlook interface: Conversation collapsed in the Reading pane.

7 Outlook interface: Conversation expanded in the Reading pane.

For Your Reference...

To **navigate messages** in a **conversation**:

1. Click on the **View** tab, click on **Show as Conversations** in the **Messages** group, then click on **[This folder]**
2. **Expand** ▶ the conversation and click on the desired message to view it in the **Reading** pane, then collapse ▲ the conversation

Handy to Know...

- If you happen to receive a message from someone that has the identical subject to other unrelated messages that you've sent and/or received, Outlook will group them together as one conversation.

REPLYING TO A MESSAGE

You can reply to a message using the **Reading** pane (if it is open) or ribbon. When the **Reading** pane is open, clicking on the **Reply** tool in the **Reading** pane or on the ribbon lets you write a

reply directly in the message in the **Reading** pane. If you've opened a message by double-clicking on it in the message list, you must click on **Reply** on the ribbon and the reply will open in a new window.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Click on the unread message from **Fritz** with the **New Products Presentation** subject in the message list to display it in the **Reading** pane

Notice the four tools at the top of the **Reading** pane...

- 2 Click on **Reply** in the **Reading** pane to open the inline reply

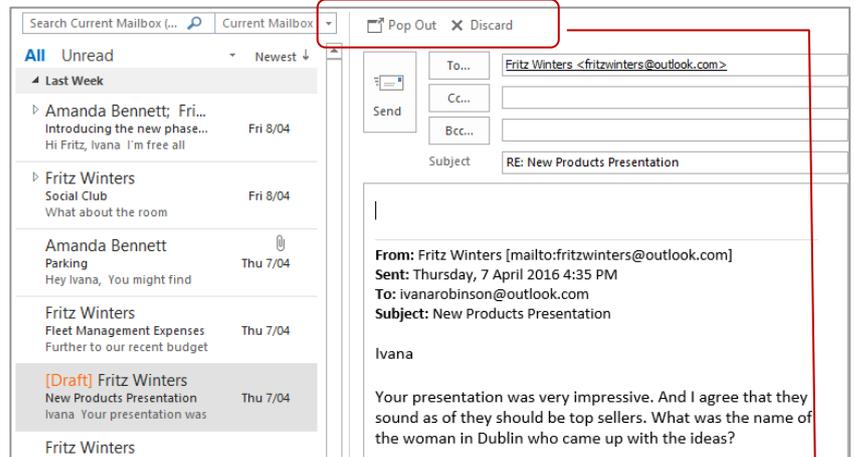
The text *[Draft]* will be added to the message in the message list showing that a copy has been temporarily saved in the **Drafts** folder...

- 3 Type a reply

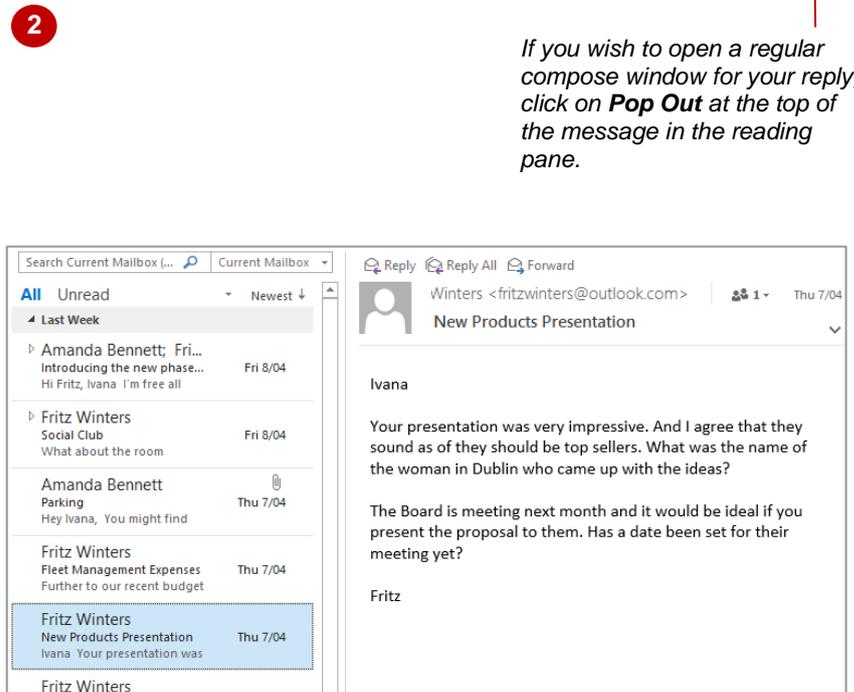
Because this is only an exercise, we won't actually send the message...

- 4 Click on **Discard** at the top of the **Reading** pane

[Draft] will be removed from the message in the message list and because you've now read the message, the highlighting will also be removed from the message reflecting this



If you wish to open a regular compose window for your reply, click on **Pop Out** at the top of the message in the reading pane.



4

For Your Reference...

To **reply** to a **message** using **inline replies**:

1. Select the message in the message list
2. Click on **Reply** in the **Reading** pane or in the **Respond** group on the **Home** tab
3. Type your response
4. Click on **[Send]**

Handy to Know...

- If the **Reading** pane isn't open in your Mail view, clicking on **Reply** in the **Respond** group on the **Home** tab will open the reply message in a new window.
- When you reply to a message that includes attachments, the attachments will not be sent back to the sender with the reply.

REPLYING TO A MESSAGE IN A CONVERSATION

Replying to a message that is part of a conversation is only slightly different to replying to any other message. You can reply to any message in a conversation and Outlook will send

a response to the message that appears at the top of the **Reading** pane. As a result of this, you must expand the conversation and click on the desired message before clicking on **Reply**.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Ensure that **Conversations** is turned on (**View** tab), then expand the **Permits required for outdoor event** conversation, as shown

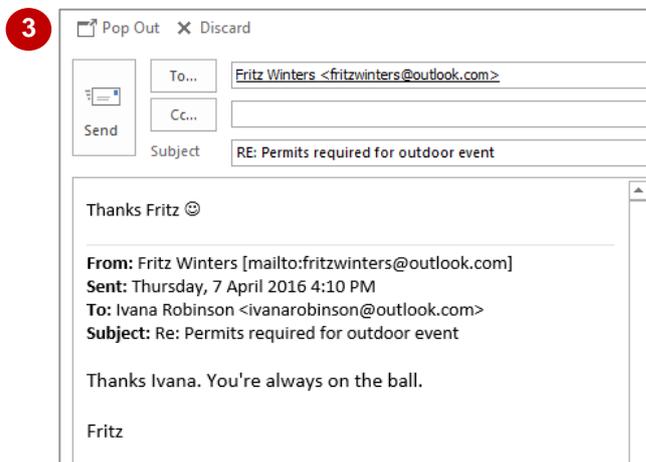
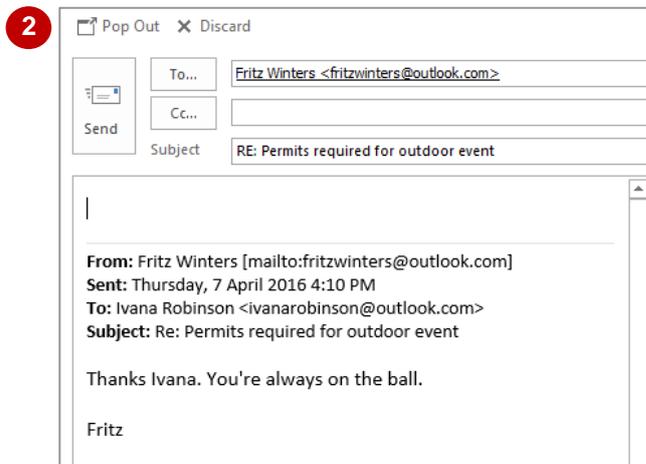
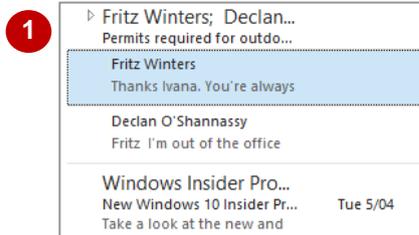
This conversation is split into two: one conversation with Declan and one with Fritz. Let's reply to the latest message received from Fritz...

- 2 Ensure that the message from **Fritz** is selected in the message list, then click on **Reply** in the **Reading** pane to open the inline reply in the **Reading** pane

- 3 Type a reply, if desired

- 4 Click on **Discard** in the **Reading** pane rather than **[Send]** to close the message

If you were to send this reply, Outlook would add it to the top of the Fritz split conversation



For Your Reference...

To **reply** to a **message** in a **conversation**:

1. Expand the conversation
2. Select or open the message to which you want to respond
3. Click on **Reply** in the **Reading** pane or in the **Respond** group on the **Home** tab

Handy to Know...

- If a conversation has split into two or more conversations, you must click on the part of the conversation to which you want to reply and the response will be sent to the latest message in that split.

REPLYING TO ALL MESSAGES

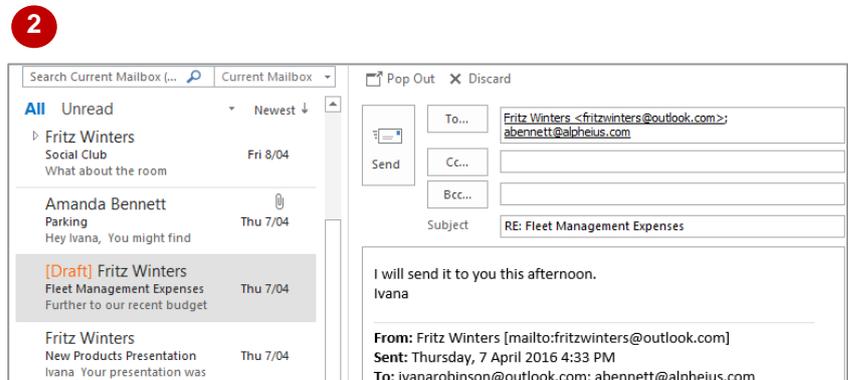
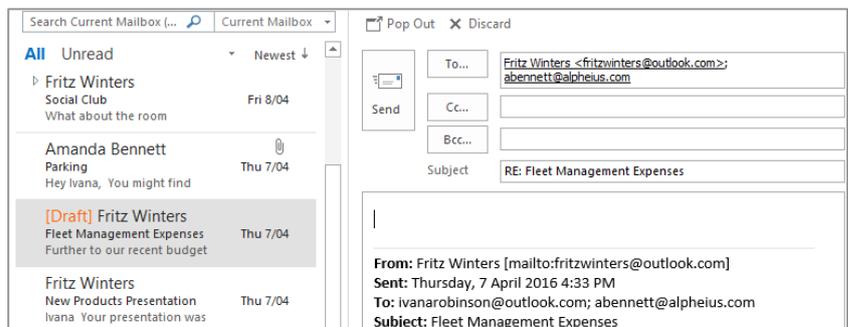
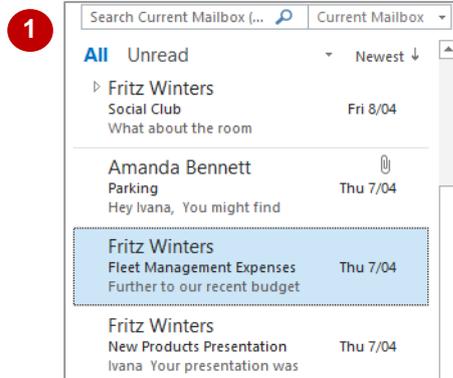
When you reply to a message in the normal way the reply is sent back to the original sender. If the original email had courtesy or blind copies, these people can also receive the reply. This can be

achieved using the **Reply All** feature. This is useful where copy recipients also need to know what your response is to a message.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Click on the message from **Fritz** with the **Fleet Management Expenses** subject to select it and display it in the **Reading** pane
- 2 Click on **Reply All** in the **Reading** pane to open the inline reply
- 3 Type a response, if desired
- 4 Click on **Discard** in the **Reading** pane to close the reply rather than clicking on **[Send]**



For Your Reference...

To **reply to all recipients** of a **message**:

1. Select or open the message
2. Click on **Reply All** in the **Reading** pane or in the **Respond** group on the **Home** tab
3. Type your response
4. Click on **[Send]**

Handy to Know...

- If you click on **Reply All** to a large recipient list, Outlook will display a mail tip checking whether you really want to reply to all recipients or only the initiator.

REPLYING WITHOUT THE ORIGINAL MESSAGE

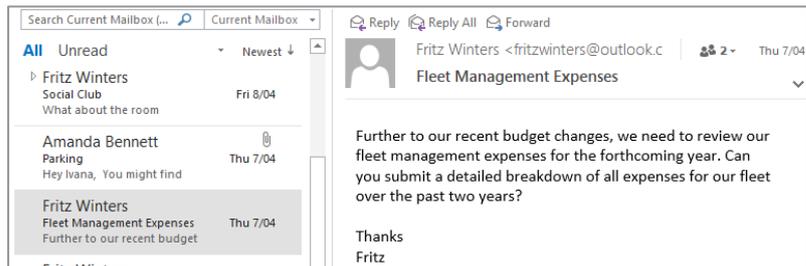
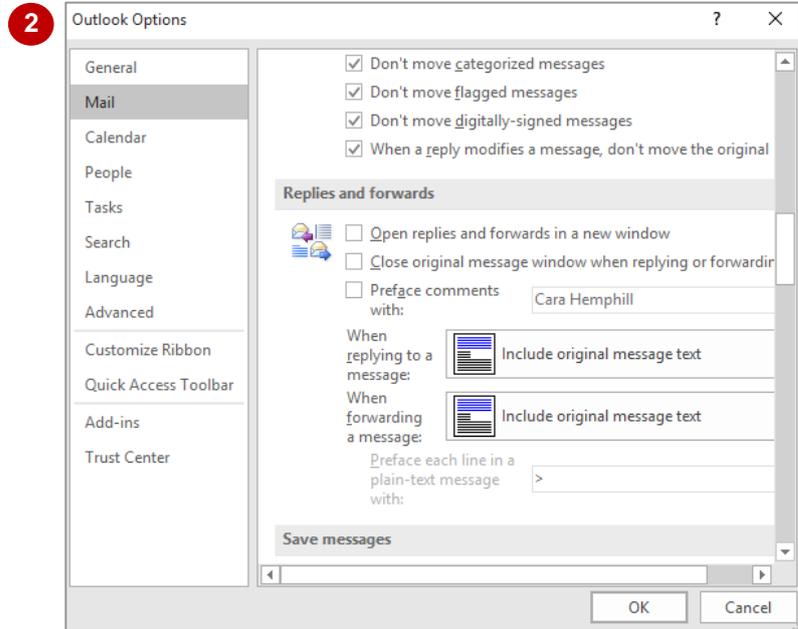
Normally, when you reply to a message the original message is sent back appended to the bottom of your reply. As messages and replies move back and forth, a history of the

communication is seen within the message. But if you do not want this to occur, you can elect to reply to messages without sending the original text.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Click on the **File** tab to open the **Backstage**, then click on **Options** to open the **Outlook Options** dialog box
- 2 Click on **Mail** in the left pane, then scroll down to the **Replies and forwards** section
- 3 Click on the drop arrow for **When replying to a message**, select **Do not include original message** and click on [OK]
- 4 Click on the message from **Fritz** with the **Fleet Management Expenses** subject to display it in the **Reading** pane
- 5 Click on **Reply** in the **Reading** pane
The original message hasn't been included in the reply. Let's revert the reply option to the default value...
- 6 Click on **Discard** to discard the reply, then repeat steps 1 to 3 but selecting **Include original message text**



For Your Reference...

To ensure **replies don't include** the **original message text**.

1. Click on the **File** tab and click on **Options**
2. Click on **Mail**
3. Change **When replying to a message** to **Do not include original message**

Handy to Know...

- The **Mail** category in the **Options** dialog box has a number of options that allow you to configure how your email will work. These are worthy of further exploration.

ADDING COMMENTS TO REPLIES

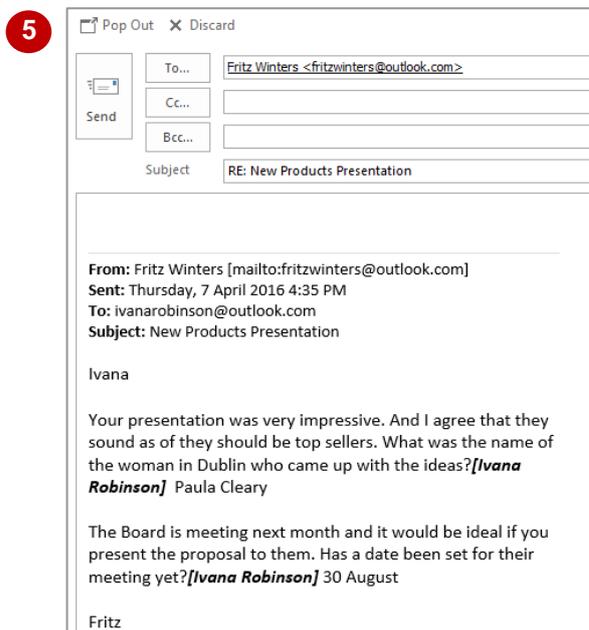
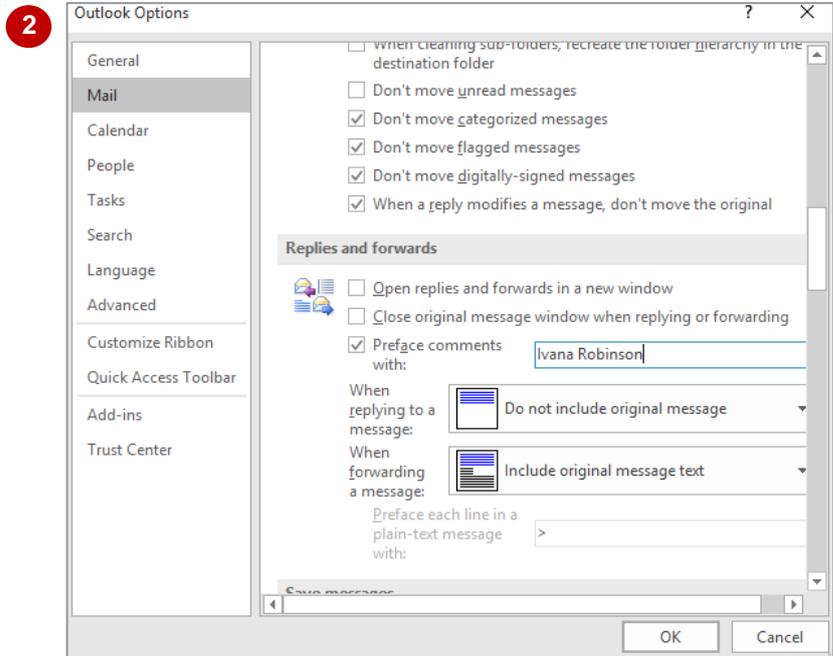
When you reply to some email messages, it can be clearer and quicker to simply type your responses next to the statements within the body of the original message. You can do this using

inline comments. And to ensure your comments are clearly marked, you can alter the **Options** so that your name (or other text) automatically appears before your comments.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Click on the **File** tab, click on **Options**, click on the **Mail** category, then scroll down to the **Replies and forwards** section
- 2 Click on **Preface comments with**, then type your name in the box
- 3 Click on **[OK]** to return to the **Inbox**
- 4 Click on the message from **Fritz** with the **New Products Presentation** subject, then click on **Reply** in the **Reading** pane
- 5 Click at the end of the first paragraph and type **Paula Cleary** and then click at the end of the next paragraph and type **30 August**
- 6 Click on **Discard** to discard the reply, then repeat steps 1 to 3 to turn off the **Preface comments with** option



For Your Reference...

To **add comments** to replies:

1. Click on the **File** tab and click on **Options**
2. Click on the **Mail** category, click on **Preface comments with** and then type your name or other text as desired
3. Click on **[OK]**

Handy to Know...

- You can add inline comments to reply messages without adding your name to the **Preface comments with** option simply by typing them. However, your comments will be easier to see in the reply message if you do utilise this option.

GETTING REPLIES SENT TO ANOTHER ADDRESS

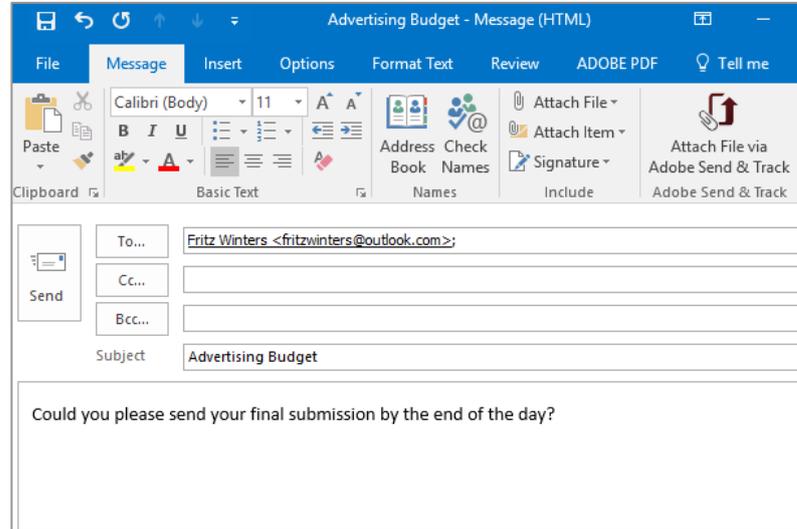
When you create an email message, you can nominate someone else to whom the replies to your email should be sent. This may be useful if you want to initiate a message but are then going

on a holiday. Or perhaps you are a project leader and you want to delegate work to be done via email, and you need someone else to manage the responses and progress.

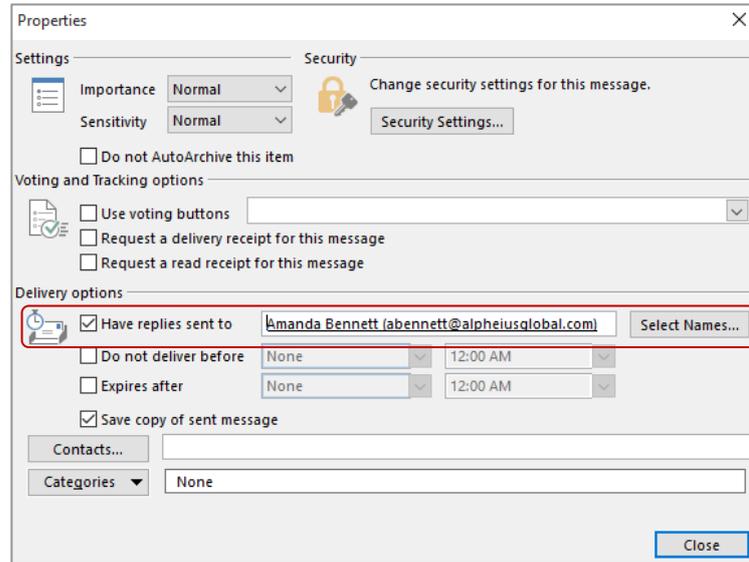
Try This Yourself:

Continue using the previous file with this exercise...

- 1 Create a new email message and address it to one of your colleagues
- 2 Type **Advertising Budget** in the Subject and type **Could you please send your final submission by the end of the day?** as the message
- 3 Click on the **Options** tab, click on **Direct Replies To** in the **More Options** group to open the **Properties** dialog box
- 4 Ensure that **Have replies sent to** under **Delivery options** is ticked, and then type the email address (or click on **[Select Names]**) for the person who will receive the replies to this message
- 5 Click on **[Close]**
The Direct Replies To command on the ribbon will be highlighted in blue showing you've accessed this option...
- 6 Press **[Esc]** and click on **[No]** to discard the message without saving a draft



2



4

For Your Reference...

To **direct replies** to **another email address**:

1. Create a new blank message
2. Click on the **Options** tab, then click on **Direct Replies To** in the **More Options** group
3. Tick **Have replies sent to**
4. Type the new email address

Handy to Know...

- The **Properties** dialog box includes an option to delay sending a message until after a specified time (**Do not deliver before**), and an option to give a message a use by date (**Expires after**). Note that an expired message will still appear in your **Inbox** but its **Subject** will display in strikethrough.

FORWARDING MESSAGES

The **Forward** facility of Outlook Mail lets you take a message that you have received and forward it to other users. You can add your own comments if you need to, or you can send the original

message without any additional information. Either way, the original message is clearly marked for easy identification – the Subject is preceded by the letters **FW:** (an abbreviation for forward).

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Click on the message from **Amanda** with the **Parking** subject to display it in the **Reading** pane

Notice that this message has two attachments...

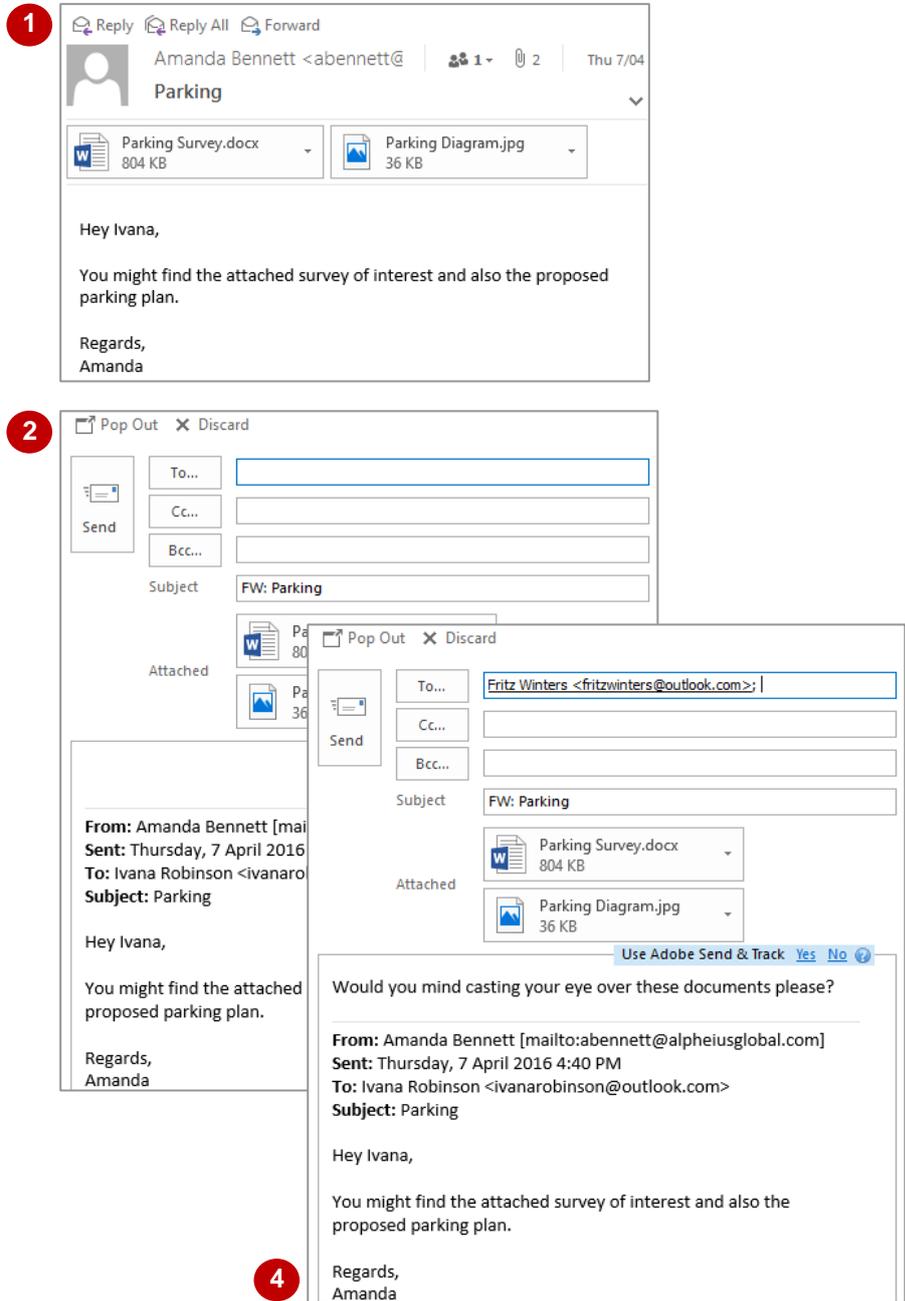
- 2 Click on **Forward** in the **Reading** pane to open the inline forwarding message

Notice that the forwarded message includes the attachments...

- 3 Type the message **Would you mind casting your eye over these documents as well please?**

- 4 Click on **[To]** to open the **Select Names** dialog box, double-click on the desired name and then click on **[OK]** to place the name in **To**

- 5 Click on **[Send]** to forward the message



For Your Reference...

To **forward** a message:

1. Select the message in the message list
2. Click on **Forward** in the **Reading** pane or in the **Respond** group on the **Home** tab
3. Nominate the recipient, type a response and click on **[Send]**

Handy to Know...

- You can forward a conversation in the same way as other messages. Click on the desired message in the conversation and click on **Forward**.
- Unlike replies, attachments are forwarded with a forwarded message.

FINDING RELATED MESSAGES

The **Find Related Items** feature lets you quickly search for all messages that you've received from a specific sender. And if you don't utilise the **Conversation** feature on the **View** tab, you can

also use **Find Related Items** to list all messages in a selected conversation – that is, all messages with the same subject.

Try This Yourself:

Continue using the previous file with this exercise...

1 Click on the **View** tab, click on **Show as Conversations** in the **Messages** group, then click on **[This folder]** to turn off conversation view

2 Right-click on the first message from **Amanda** with the **Introducing the new phase Amazon** subject to display a shortcut menu

3 Select **Find Related > Messages in this Conversation**

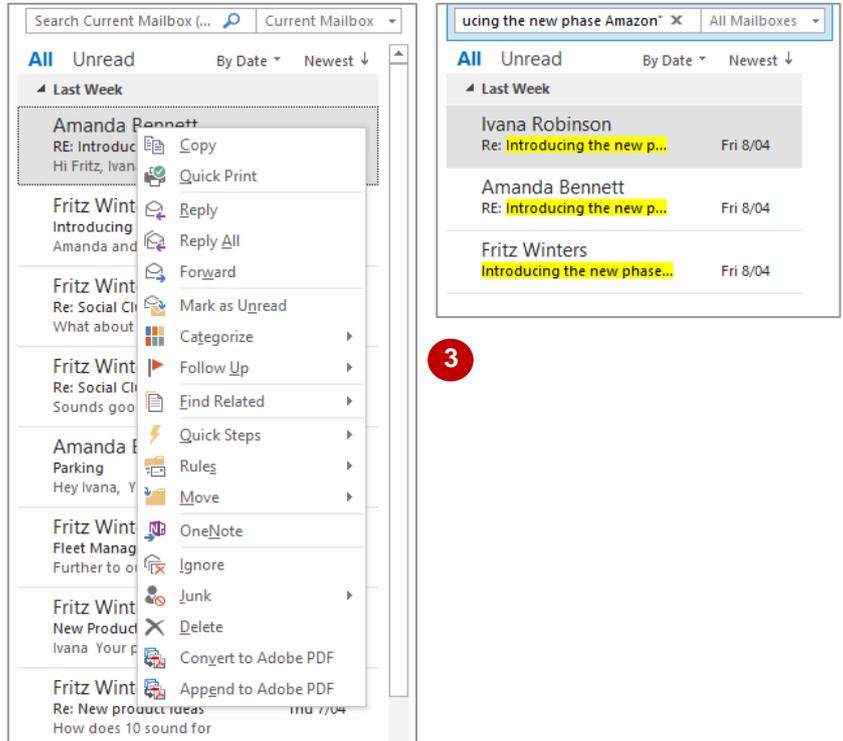
All messages in this conversation will be listed in the message list making it easy for you to read them in the Reading pane...

4 On the **Search Tools: Search** tab, click on **Close Search** in the **Close** group to re-display the message list

5 Right-click on a message from **Fritz** and select **Find Related > Messages from Sender**

All messages from Fritz will be listed in the message list...

6 Click on **Close Search**, then repeat step 1 to turn on conversation view again



2

3

For Your Reference...

To **view related messages**:

1. Right-click on the message
2. Select **Find Related > Messages in this Conversation** or **Messages from Sender**

Handy to Know...

- You can further refine the search results using the various commands on the **Search Tools: Search** tab.
- If you have opened a message by double-clicking on it in the message list, you can find related messages by clicking on **Related** in the **Editing** group on the **Message** tab.

IGNORING CONVERSATIONS

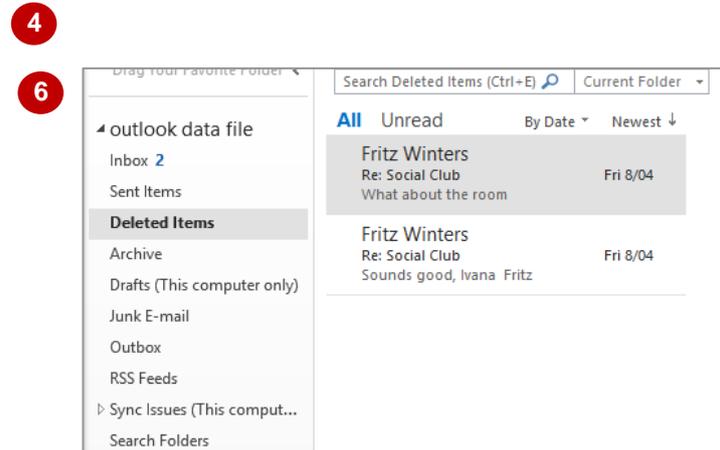
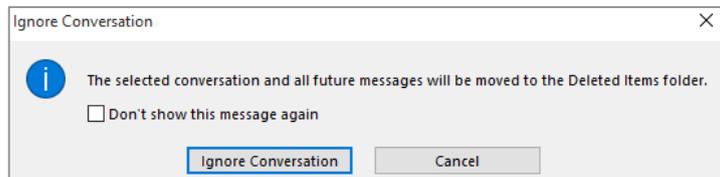
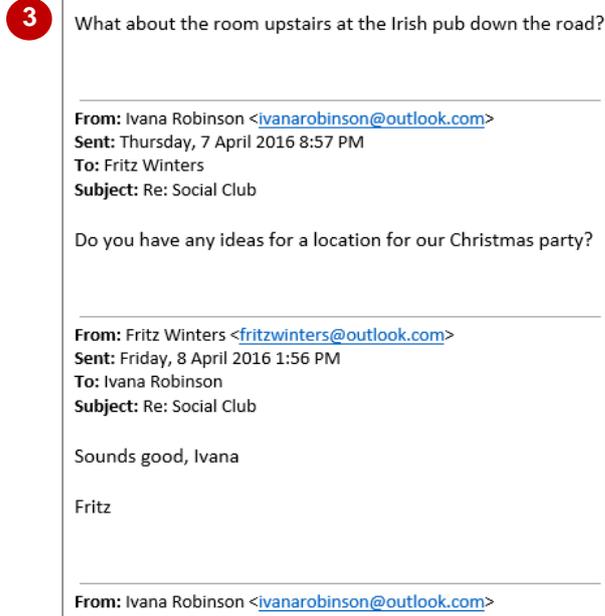
How often do you find yourself getting distracted by messages bouncing back and forth between you and other people, which start out work-related but often digress? The **Ignore**

Conversations feature deletes all messages in a conversation, plus any future replies you may receive for the same conversation. If you change your mind later, you can reverse the process.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Expand the **Social Club** conversation
- 2 Read the first message at the bottom of the **Reading** pane – it's relevant
- 3 Read the entire conversation – the latest email is going off the track – let's ignore it
- 4 Click on the **Home** tab, then click on **Ignore** in the **Delete** group – a message may appear
- 5 Click on **[Ignore Conversation]** to remove the conversation from the message list
- 6 Click on **Deleted Items** in the **Folder** pane to see the messages in the selected conversation – let's stop ignoring the conversation
- 7 Click on one of the **Social Club** messages, then click on **Ignore** in the **Delete** group and click on **[Stop Ignoring Conversation]** to move the messages from the **Deleted Items** folder back to the **Inbox**



For Your Reference...

To **ignore** a **conversation**:

1. Click on the conversation
2. Click on the **Home** tab, then click on **Ignore** in the **Delete** group
3. Click on **[Ignore Conversation]**

Handy to Know...

- You can reduce the size of a conversation by clicking on **Clean Up** in the **Delete** group. This function will delete all redundant messages in a conversation (messages that are not flagged or categorised, plus read messages except for the newest message in each branch of the conversation).

MARKING MESSAGES AS UNREAD

Messages that have a blue bold subject and vertical line in the **Inbox** are said to be **unread**. If the **Reading** pane is active, a message is considered to be **read** when it displays in the

Reading pane, even if it hasn't actually been opened in its own window and read. If the blue formatting is removed from a message, you can show it again by marking the message as **unread**.

Try This Yourself:

Continue using the previous file with this exercise...

1 Point to a message in the message list that has been read (one without any blue formatting)

A faint blue vertical line will appear to the left of the message...

2 Click on the vertical line
The blue formatting will appear. Now this message is marked as unread...

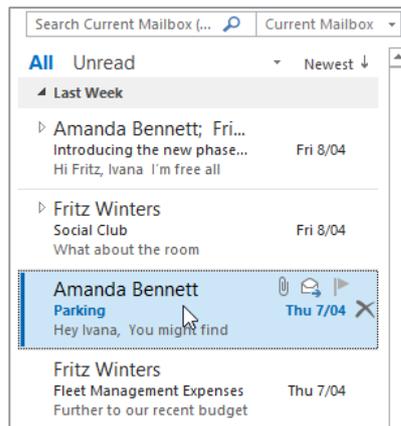
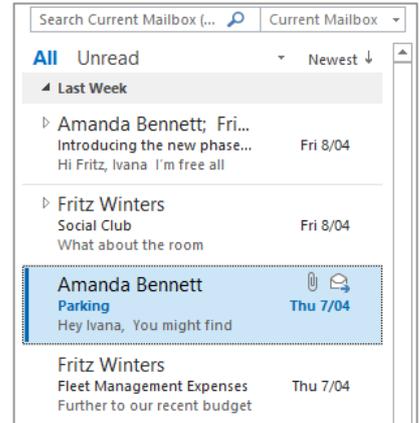
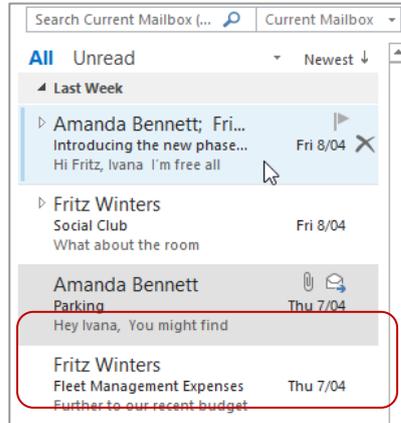
3 Click on the message to display it in the **Reading** pane, then click on another message to deselect the message

Now the blue formatting has disappeared again showing that it has been read.

We're ready to close this data file now...

4 Right-click on **Outlook_01** in the **Folder** pane and select **Close "Outlook_01"**

Only the default data file will remain listed in the Folder pane



For Your Reference...

To **mark messages** as **unread**:

1. Point to the message in the message list
2. Click on the blue vertical bar that appears to the left of the message

Handy to Know...

- When you point to a message in the message list, a **delete** icon will appear to the right of the message making it very quick to delete the message.

UNDERSTANDING CLUTTER

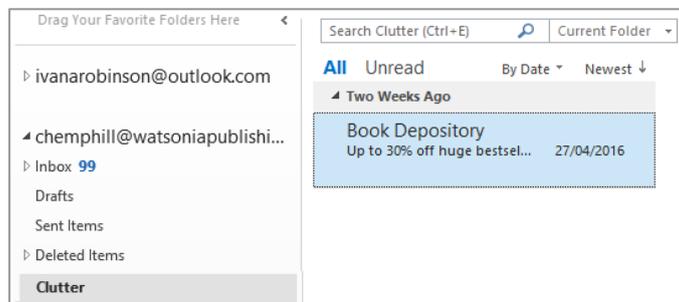
Clutter is a tool that helps you to declutter your inbox so that your inbox contains only the emails you require. It is designed to work intuitively by analysing your habits or past behaviour to

determine what kinds of emails you deem unnecessary. It is only available to Office 365 customers.

How Clutter Works

The purpose of clutter is to filter out junk email before it reaches your inbox. Clutter analyses a number of aspects such as the sender, your participation in the conversation, the number of recipients and the importance of the email in order to determine whether it is clutter or not. It identifies junk email, then based on your past behaviour, analyses the remaining messages and moves the types of messages you usually ignore or don't respond to. Clutter takes some time to work intuitively as it must first learn your preferences and habits. You can help Clutter to work more efficiently by checking Clutter regularly and removing any emails that have moved there mistakenly. You can also move emails that you view as low priority to the Clutter folder.

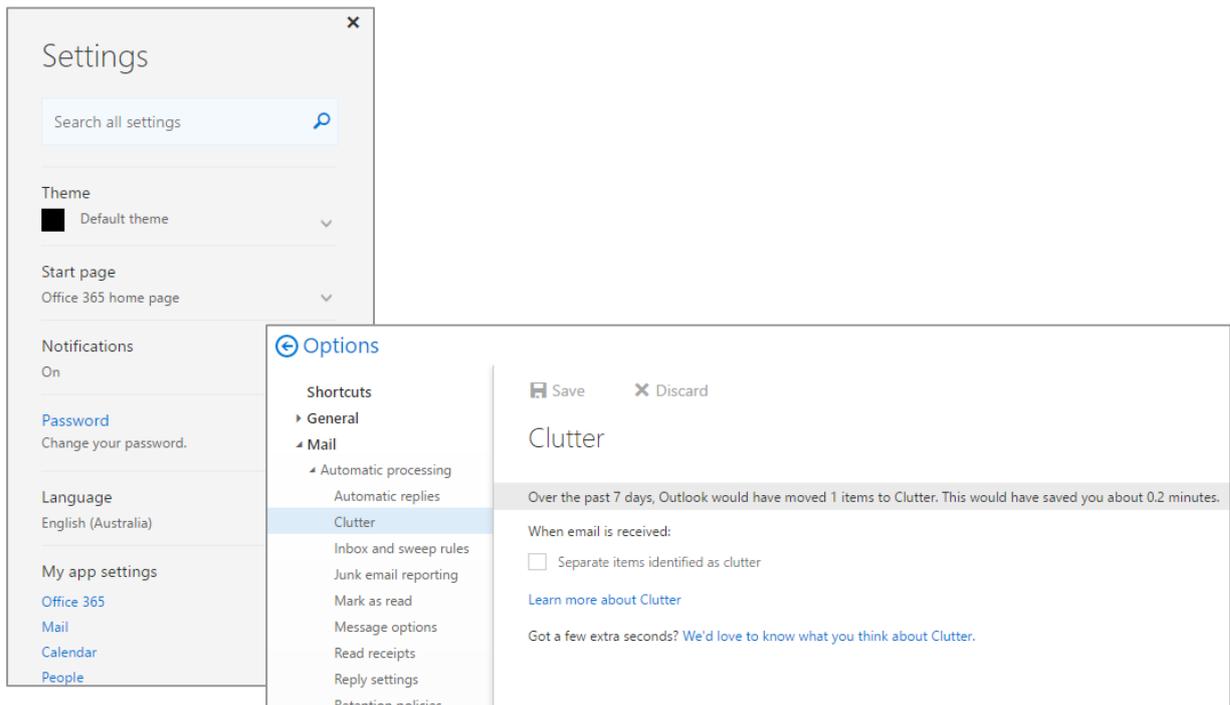
By default, clutter appears as a folder in your **Folder** pane in Outlook. To view the contents of the **Clutter** folder simply click on it as you would any other folder.



Disabling Clutter

In order to turn Clutter off you must

1. Sign in to Office 365 online and click on **Settings**
2. Select **Mail** under **My App Settings**
3. Click on **Clutter** in the left pane
4. Click on **Separate items identified as clutter** so it appears *unticked*



CHAPTER 4 WORKING WITH ATTACHMENTS

InFocus

Attachments are files or other Outlook information (known as items) that can be sent as part of an email message. For example, you can attach **files** such as Word documents or Excel workbooks, as well as Outlook **items**, such as other email messages, appointments or contacts.

In this session you will:

- ✓ gain an understanding of file attachments
- ✓ learn how to add a file attachment to an email message
- ✓ learn how to add other **Outlook** items to an email message
- ✓ learn how to preview file attachments
- ✓ learn how to save a file attachment to your hard disk
- ✓ learn how to open a file attachment.

UNDERSTANDING FILE ATTACHMENTS

Email is used as a means of communicating with other people. It is also often used to transfer files between people by including them as message attachments. Attachment files are usually

legitimate documents such as proposals, budgets, lists, pictures, and so on, but occasionally they may contain dangerous viruses.

What Is A File Attachment?

An attachment is an ordinary computer file that is sent in conjunction with an email message. Attachments to email messages provide an easy way to send computer files from one computer to another.

What Types of Files Are Sent As Attachments?

Virtually any type of computer file can be sent as an attachment. Commonly, these files are ones created with a word processing application (letters, proposals, reports), worksheet files (budgets, travelling expenses, sales proposals), picture and movie files, presentation files, and the like.

Outlook itself does not do anything with these files except act as a carrier from one computer to another. When attachments are sent it is usually necessary for the person receiving the attachment to have the appropriate software to be able to open the attachment file.

Dangers Associated With File Attachments

While attachments provide a great deal of convenience and ease of sharing data and information between computers, they also make computers extremely vulnerable.

Once a computer is connected to a network or the internet, there is always a danger that the computer will be accessed by people not authorised to do so – this process is referred to as hacking – and hackers (people who illegally access other computers) range from people who are just having fun to those who are intent on malicious damage.

Programs such as Outlook and your internet browser have been developed to repel as many of these hackers and their attacks as possible. As a means of getting around these protective measures hackers have discovered that attachments provide a way of accessing a computer that might otherwise be well protected. Since hackers can't normally break into your computer unassisted, they have developed clever programs that can be sent with a normal attachment. Once the attachment is opened these programs are unleashed on your computer. The maliciousness of these programs varies, ranging from doing nothing to completely wiping the contents of your computer.

Outlook blocks potentially unsafe file attachment types (including .bat, .exe, .vbs and .js) that can contain viruses. However, extreme care should always be taken when working with attachments. If Outlook blocks any attachment files in a message, a list of the blocked file types appears in the InfoBar at the top of your message.

Protecting Yourself From The Inherent Dangers Of Attachments

Ideally avoiding attachments altogether is the best way to avoid problems. Unfortunately, this is not practical. However, there are some precautionary measures that you can take when working with attachments.

1. NEVER open an attachment directly from Outlook.
2. Permanently delete messages from unknown and unexpected email senders with suspect attachments – be extremely wary of deals and offers that are just too good to be true.
3. ALWAYS save attachments to your hard disk and scan them with an up-to-date anti-virus program before opening the attachment.
4. Ensure your computer antivirus software is up-to-date.

INSERTING A FILE ATTACHMENT

File Attachments are usually files containing additional information for the recipient. For example, you may want to send a photograph, a report created in Word, an expense sheet

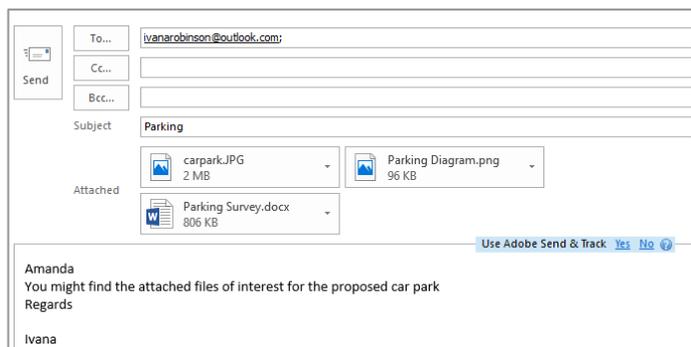
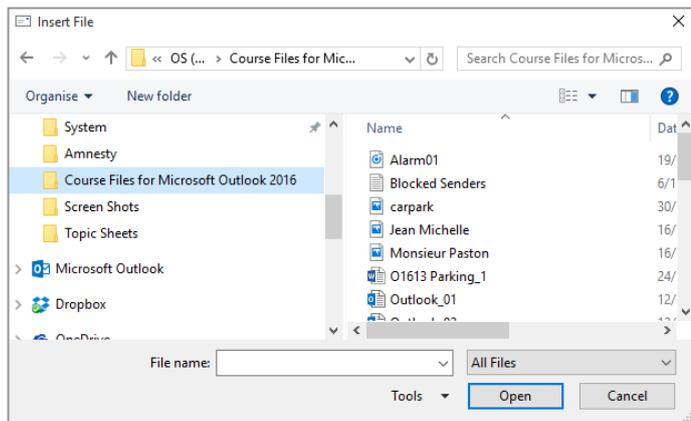
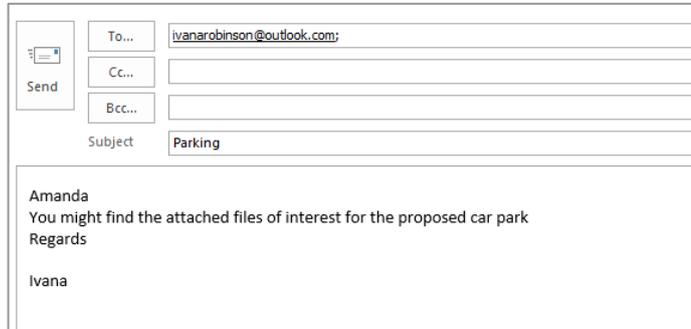
created in Excel, or a presentation created in PowerPoint. File attachments don't just have to be files created in other Microsoft programs – you can attach files created in most programs.

Try This Yourself:

Open File

Before starting this exercise you MUST open the data file Outlook_02.pst...

- 1 Create a new message, address it to yourself and type **Parking** in **Subject**
- 2 Type the following message
Amanda
You might find the attached files of interest for the proposed car park.
Regards
your name
- 3 On the **Message** tab, click on **Attach File** in the **Include** group to open the gallery of options, then click on **Browse This PC** to open the **Insert File** dialog box
- 4 Ensure the course files folder is selected, click on **carpark.jpg**, press **Ctrl** and click on **Parking Diagram.png** and **Parking Survey.docx** to select the three files, then click on **[Insert]**
The files will appear in the header. Notice that the .JPG image is large (2MB)...
- 5 Click on the **File** tab, then in the **Info** tab click on **Resize large images when I send this message** under **Image Attachments** and press **Esc**
- 6 Send the message



For Your Reference...

To **add a file attachment** to a **message**:

1. On the **Message** tab, click on **Attach File** in the **Include** group
2. Navigate to the desired folder
3. Click on the file
4. Click on **[Insert]**

Handy to Know...

- When adding file attachments, try to mention words like **attach** or **attachment** in the message. If you try sending the message without an attachment, Outlook will warn you.
- You can attach files to an open message by dragging them from the folder in File Explorer and dropping them in the message window.

ATTACHING OTHER OUTLOOK ITEMS

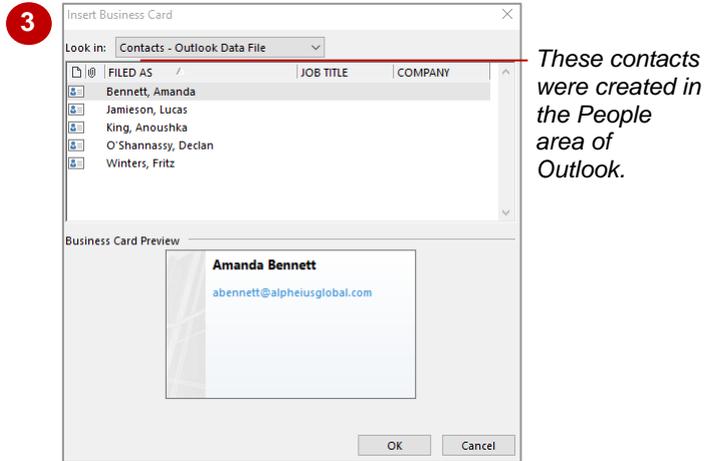
You can attach other Outlook items to an email message. For example, you may wish to insert a business card showing a client's contact details; a list of when you're free or busy for a specific

period; or several messages, tasks, notes or other items from your Outlook folders. This method is the easiest way to forward multiple items or messages.

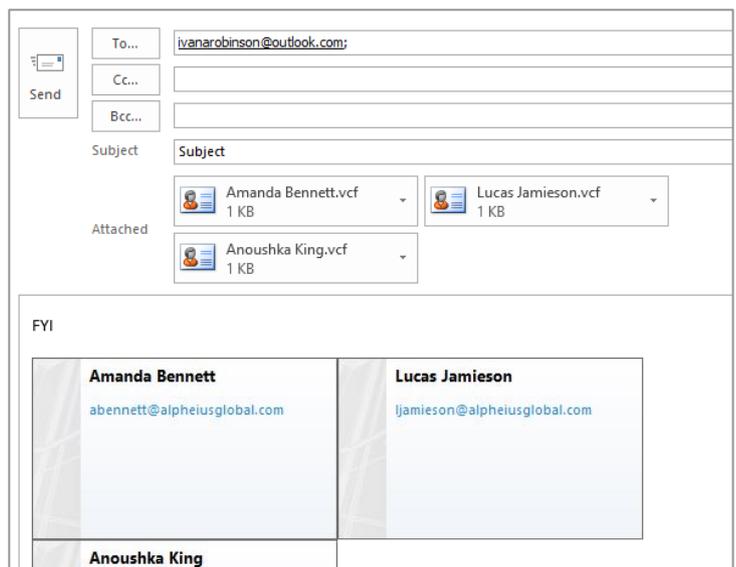
Try This Yourself:

Continue using the previous file with this exercise...

- 1 Create a new message, address it to yourself and type **Attaching Items** in **Subject**
 - 2 Type **FYI** in the message box and press **Enter** twice
 - 3 On the **Message** tab, click on **Attach Item** in the **Include** group and select **Business Card > Other Business Cards** to open the **Insert Business Card** dialog box
 - 4 Click on the drop arrow for **Look in** and select **Contacts – Outlook Data File**
 - 5 Click on one contact, then press and hold **Ctrl** and click on two other contacts to select them, then click on **[OK]** to insert them into the message
- Let's attach some messages...
- 6 Repeat step 3 to select **Outlook item** and open the **Insert Item** dialog box
 - 7 Navigate to and click on **Inbox in outlook data file** in the **Look in** pane, as shown
 - 8 Click on one message, press and hold **Ctrl** and click on three other messages to select them, and then click on **[OK]** to insert them into the message header
 - 9 Send the message



These contacts were created in the People area of Outlook.



For Your Reference...

To **add** an **item attachment** to a **message**:

1. On the **Message** tab, click on **Attach Item** in the **Include** group
2. Select the appropriate option
3. Specify the desired settings

Handy to Know...

- You can insert a message as text in the body of your email rather than as an attachment. Click on the **Message** tab, click on **Attach Item** in the **Include** group and select **Outlook Item**. Select the folder in **Look in**, select the **Items**, click on **Text only** under **Insert as** and click on **[OK]**.

PREVIEWING ATTACHMENTS

Messages containing an attachment are easy to identify – they appear with a **paper clip** icon next to the sender’s name in the message list. You don’t have to open file attachments to see their

contents. For many file attachments you can simply preview them in the **Reading** pane or in the open message.

Try This Yourself:

Continue using the previous file with this exercise. Ensure the Parking message you sent yourself earlier is in your Inbox. Otherwise, you can use our Parking message in the data file...

- 1 Click on your message with the **Parking** subject to view its content in the **Reading** pane
Notice that the message header includes the three file attachments to the right of the word 'Message'.
Notice also that Outlook has reduced the size of the car park image from 2MB to about 220KB and converted the parking diagram from a .png to a .jpg when the message was sent...
- 2 Click on **carpark.JPG** in the message header to view its content in the **Reading** pane
- 3 Click on **Parking Diagram.jpg** to view its content in the **Reading** pane
- 4 Click on **Parking Survey.docx** to view its content in the **Reading** pane
- 5 Click on **Back to message** to the left of the attachments in the header, as shown, to redisplay the message



For Your Reference...

To **preview attachments**:

1. Click on the message with the attachment/s to view it in the **Reading** pane, or Double-click on the message to open it
2. Click on the attachment in the header

Handy to Know...

- Active content embedded in attachments (including scripts, macros and ActiveX controls) will be disabled during a preview.

SAVING A FILE ATTACHMENT

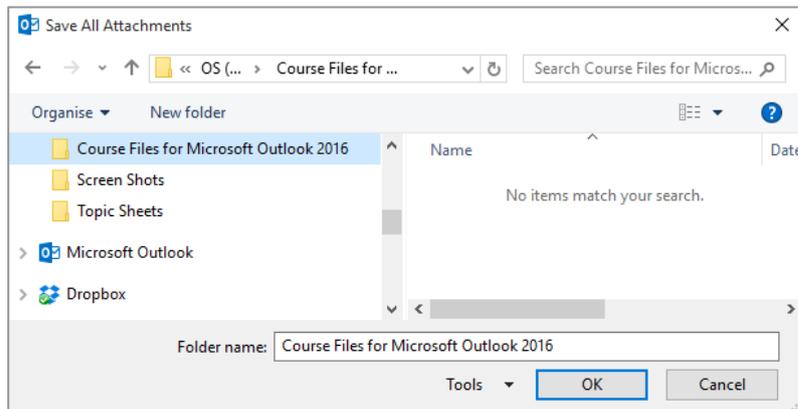
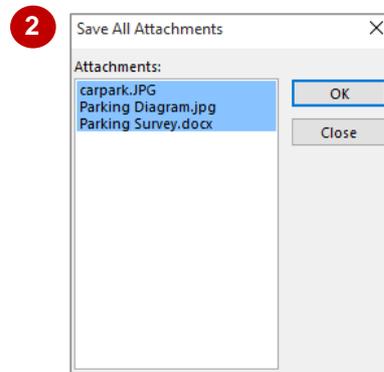
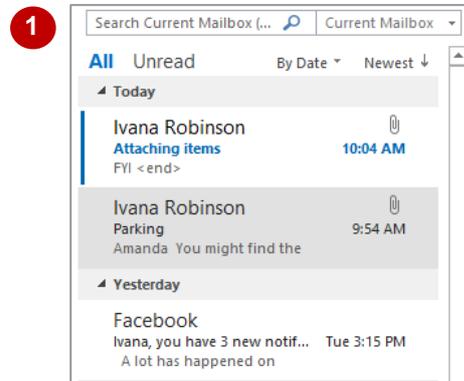
When you receive a message with a file attachment, you will probably want to open the attachment to see what it contains. But, to protect your computer you should always save a file

attachment to your hard disk, and then scan it using an up-to-date virus program before opening it. You can quickly save attached files from the **Reading** pane or open message window.

Try This Yourself:

Continue using the previous file with this exercise. Ensure the Parking message you sent yourself earlier is in your Inbox. Otherwise, you can use our Parking message in the data file...

- 1 Click on your message with the **Parking** subject to select the message
- 2 Click on the **File** tab to open the **Backstage**, then click on the **Save Attachments** tab to open the **Save All Attachments** dialog box
Let's save all three files...
- 3 Ensure that the three files are selected, click on **[OK]** to open the **Save All Attachments** dialog box, and then navigate to the course files folder
Two of these files are already stored in this folder, but we'll overwrite them...
- 4 Click on **[OK]** and then click on **[Yes]** as required to save the three file attachments



3

For Your Reference...

To **save file attachments**:

1. Select the message in the message list
2. Click on the **File** tab, click on the **Save Attachments** tab, select the files and click on **[OK]**
3. Select the folder location and click on **[OK]**

Handy to Know...

- You can right-click on an attachment in the **Reading** pane or open message to display a shortcut menu, then select **Save As** to save the attachment to your hard disk.

OPENING A FILE ATTACHMENT

Although it's safer to review attachments, you can open them from Outlook if you're sure they are safe. To open an attachment, double-click on it in a message. When you open an attachment it

will either open in **Protected View** (this view lets you read a file without editing it to reduce possible risks) or a dialog box will display providing you with options to open or save the file to disk.

Try This Yourself:

Continue using the previous file with this exercise. The email with the **Parking** subject must be in your **Inbox**. Otherwise, you can use our **Parking** message in the data file...

- 1 Click on the message with the **Parking** subject to view its contents in the **Reading** pane

- 2 Double-click on the **Parking Survey.docx** attachment to open it in Microsoft Word

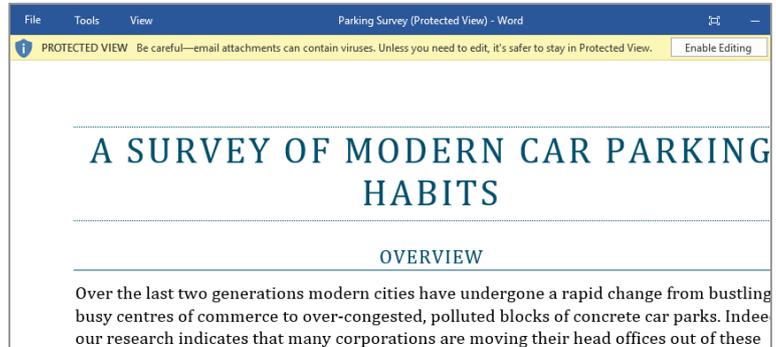
Because attachments in emails can come from unknown or unreliable sources, the file might open in **Protected View** – a warning will appear in the **Info bar** beneath the ribbon.

If you're not sure how safe the file is, read and then close it. Do not enable editing as this increases the risk of harming your computer from viruses, worms and other malware...

- 3 Since this attachment is trustworthy, click on **[Enable Editing]** in the **Info Bar** to enable editing

The normal ribbon will appear...

- 4 Close the Word document, then close the **Outlook_02** data file



- 2 **Protected View** is a read-only mode where most editing functions are disabled. If you have to read the file but don't have to edit it, remain in **Protected View**. If you know the file is from a trustworthy source and you want to edit, save or print the file, you can exit **Protected View** by clicking on **[Enable Editing]**. There are several reasons why files will open in **Protected View**. For example, the file:

- was opened from an internet location
- was opened from an unsafe location such as your **Temporary Internet Files** folder
- is an Outlook attachment.

For Your Reference...

To **open a file attachment**:

1. Click on the message with the attachment to open it in the **Reading** pane, or Double-click on the message to open it
2. Double-click on the file attachment
3. Click on **[Open]** if necessary

Handy to Know...

- Sometimes when you double-click on a file attachment to open it, the **Opening Mail Attachment** dialog box will display. From this dialog box, you can either click on **[Open]** to open the file or click on **[Save]** to save it to disk.

NOTES:



CHAPTER 5 EDITING MESSAGES

InFocus

Most email messages are comprised of text. This is because email messages are used predominantly by people to communicate with each other. Many of the techniques that are used for working with text in word processing applications also apply to email messages in Outlook.

In this session you will:

- ✓ learn how to copy and paste within a message
- ✓ learn how to copy content between email messages
- ✓ learn how to copy information from another source document into a message
- ✓ learn how to delete text from a message
- ✓ learn how to remove an attachment before forwarding a message.

COPYING TEXT WITHIN A MESSAGE

Most email applications have word processing features that conform to standard Windows conventions. In this respect, Microsoft Outlook is no exception. To help perform basic operations

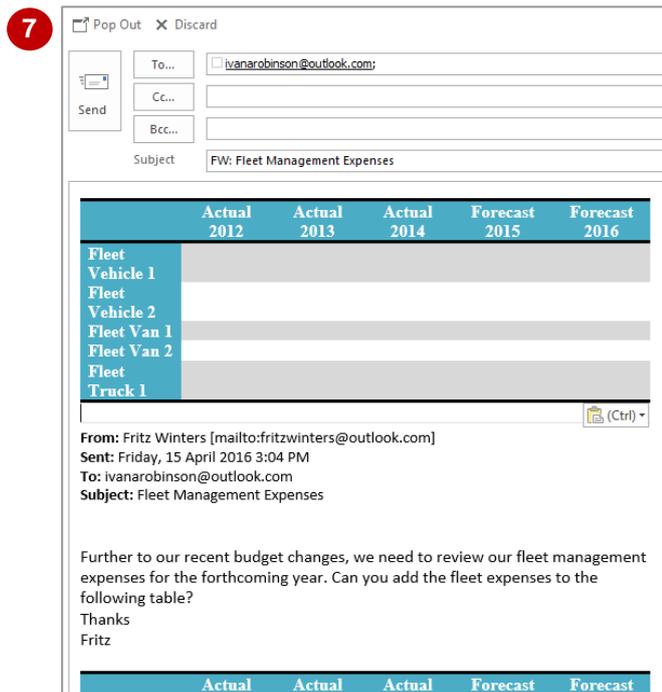
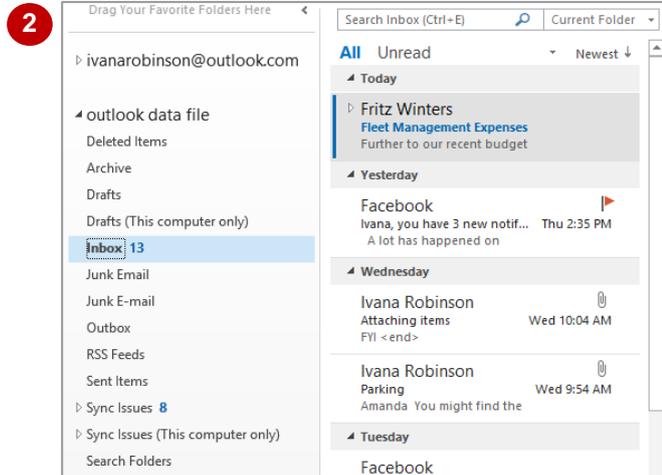
such as cutting, copying and pasting, Outlook provides a set of tools on the **Compose Tools: Message** tab and the various other contextual tabs available on the ribbon.

Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file *Outlook_13.pst...*

- 1 Ensure **Mail** is selected in the **Navigation** bar and that the **Outlook_13** file is expanded in the **Folder** pane
- 2 Select **Inbox** in the **Folder** pane, then ensure the message from **Fritz Winters** with the **Fleet Management Expenses** subject is selected in the message list
- 3 Click on **Forward** at the top of the **Reading** pane to display a new message
- 4 Address the message to either yourself or one of your colleagues
- 5 Select the table
- 6 On the **Compose Tools: Message** tab, click on **Copy** in the **Clipboard** group to copy the table to the clipboard
- 7 Click in the top part of the email where you want to type your message, then click on the top half of **Paste** in the **Clipboard** group to paste the table into the message
- 8 Click on **Discard** at the top of the **Reading** pane to discard the message



For Your Reference...

To **copy text within** a message:

1. Select the text to copy, then click on the **Compose Tools: Message** tab
2. Click on **Copy** in the **Clipboard** group
3. Position the insertion point where you want the text inserted, then click on the top half of **Paste** in the **Clipboard** group

Handy to Know...

- You can use the standard Windows keyboard shortcuts for copying and pasting information in an email message. For example, **Ctrl** + **C** will copy a selection to the clipboard and **Ctrl** + **V** will paste it.

COPYING TEXT BETWEEN MESSAGES

Occasionally, you may find that you want to compose an email message that is very similar to a message you have previously created or received. As long as you haven't deleted the

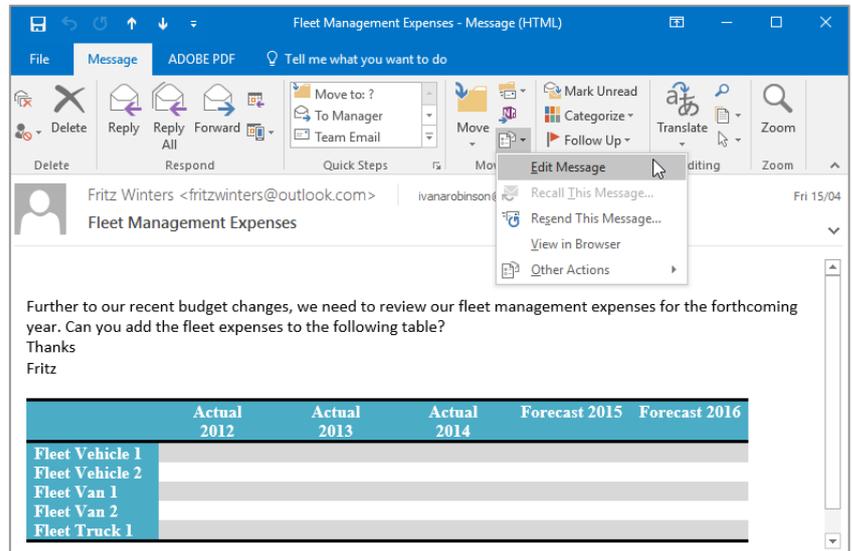
required email or the folder that contains it, you can simply open the email, select and copy the desired information and paste it into the new message.

Try This Yourself:

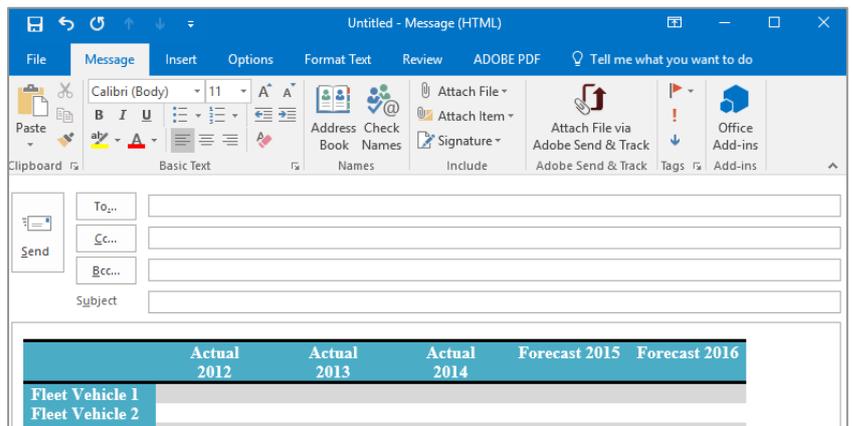
Same File

Continue using the previous file with this exercise...

- 1 In the message list, double-click on the message from **Fritz Winters** with the **Fleet Management Expenses** subject to open it in a new window
- 2 On the **Message** tab, click on **Actions** in the **Move** group, then select **Edit Message**
- 3 Select the table
- 4 Click on the **Format Text** tab, click on **Copy** in the **Clipboard** group, then close the message window
- 5 Click on **New Email** in the **New Items** group to display a new untitled message in a new window
- 6 Click in the body of the message, then on the **Message** tab click on the top half of **Paste** in the **Clipboard** group to paste the table into the message
- 7 Press **Esc**, then click on **[Yes]** to close the message and save it in the **Drafts** folder



2



6

For Your Reference...

To **copy text between messages**:

1. Open a message, click on the **Message** tab, click on **Actions** in the **Move** group, then select **Edit Message**
2. Select the text, click on **Copy** in the **Clipboard** group then close the message
3. Open a new message, click on **Paste**

Handy to Know...

- To move text either within a message or to another message, click on **Cut** in the **Clipboard** group, position the cursor where you want the text inserted, then click on the top half of **Paste**.
- The keyboard shortcut for **Cut** is **Ctrl** + **X**.

COPYING FROM ANOTHER SOURCE

If you have an existing document that contains information you would like to replicate in a message that you're composing, you don't need to retype it. You can open the document in the

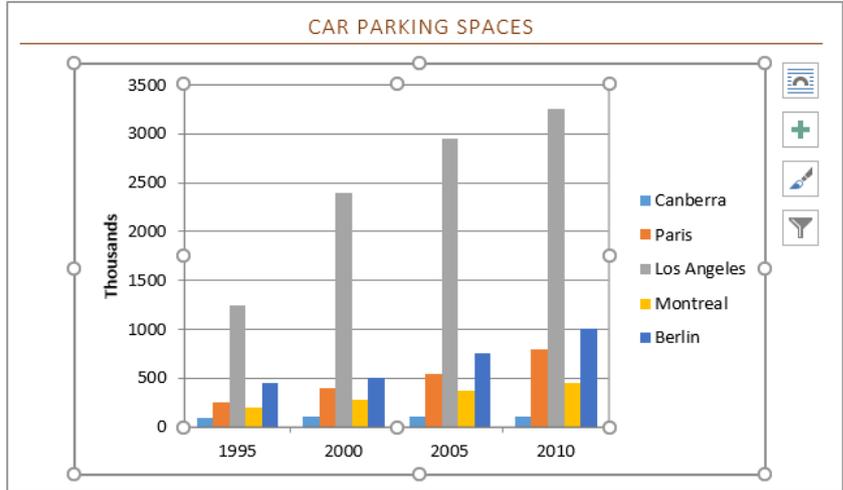
application that was used to create it and then employ the standard Windows techniques to copy the desired data or text and paste it into the email message.

Try This Yourself:

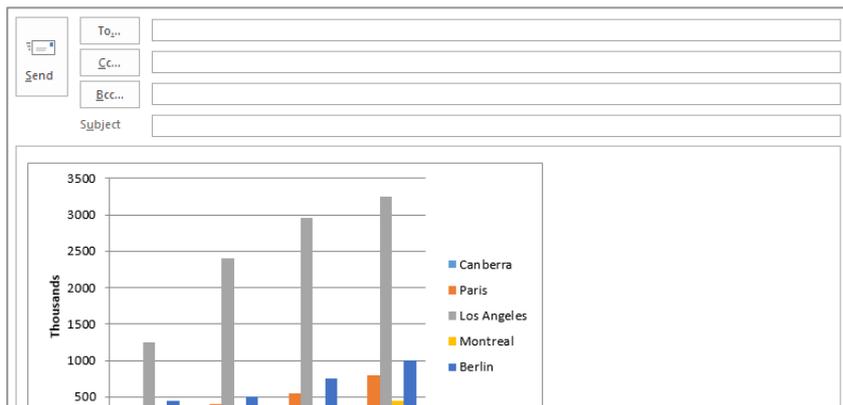
Same File

Continue using the previous file with this exercise and open the file *Parking_1.docx...*

- 1 Navigate to page 3 of the Word document, then click on the **Car Parking Spaces** chart to select it
- 2 Ensure that the **Home** tab is active, then click on **Copy** in the **Clipboard** group to copy the chart to the clipboard
- 3 Close Microsoft Word
If necessary, click on [Yes] to keep the information on the clipboard...
- 4 Return to Outlook and create a new message
- 5 Click in the text area of the message, then on the **Message** tab, click on the top half of **Paste** in the **Clipboard** group to paste the chart into the message
- 6 Press **Esc** and click on **[Yes]** to close the message and save it in the **Drafts** folder



1



5

For Your Reference...

To **copy data** from **another source**:

1. Open the application with the data
2. Click on **Copy**
3. Open the mail message
4. Position the cursor, then click on the top half of **Paste** in the **Clipboard** group

Handy to Know...

- You may need to reformat data pasted into an email message that you have copied from another application.

DELETING TEXT

Outlook employs most of the functionality that you find for working with text in a word processing application. You can therefore type, copy, move, and also delete text if it's no longer

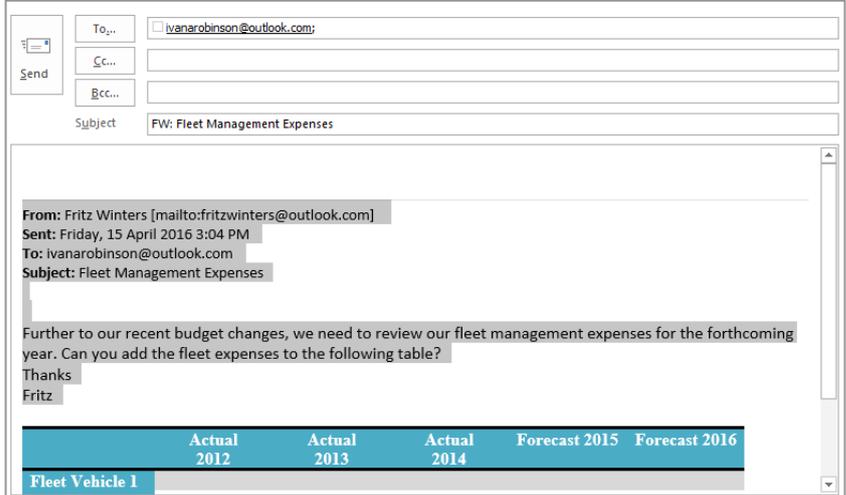
required. The same techniques for deleting text in a word processing program can be used in an Outlook email message.

Try This Yourself:

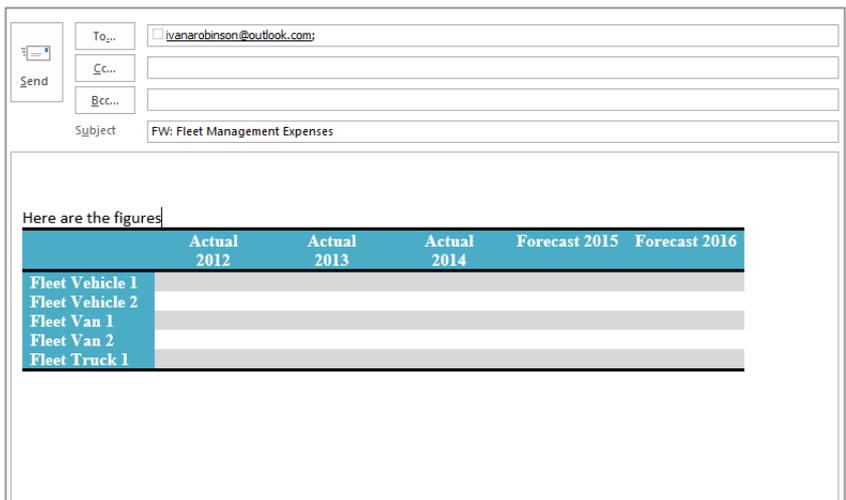
Same File

Continue using the previous file with this exercise...

- 1 In the message list double-click on the email from **Fritz Winters** with the **Fleet Management Expenses** subject
- 2 Click on **Forward** in the **Respond** group and address the message to either yourself or one of your colleagues
- 3 Select the text that appears before the table, as shown
- 4 Press **Del** to delete the selected text
- 5 Type **Here are the figures**
- 6 Press **Esc**, then click on **[Yes]** to close the message and save it in the **Drafts** folder



3



5

For Your Reference...

To **delete text** in a **message**:

1. Select the desired text
2. Press **Del**

Handy to Know...

- If you accidentally delete the wrong text, click on **Undo** in the **Quick Access Toolbar** to reverse the deletion.

REMOVING AN ATTACHMENT

If you receive a message with one or more attachments and then forward it to someone else, the attachments will be included in the forwarded message by default. If the attachments are not

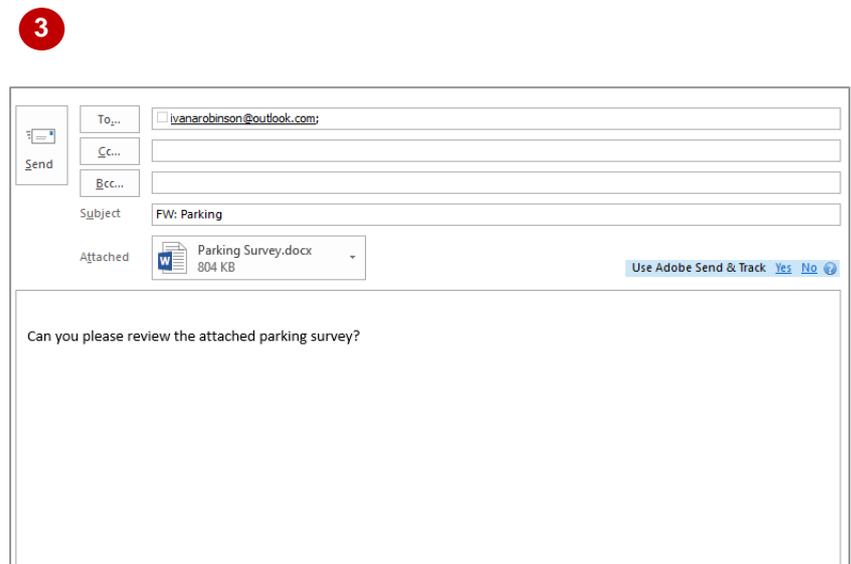
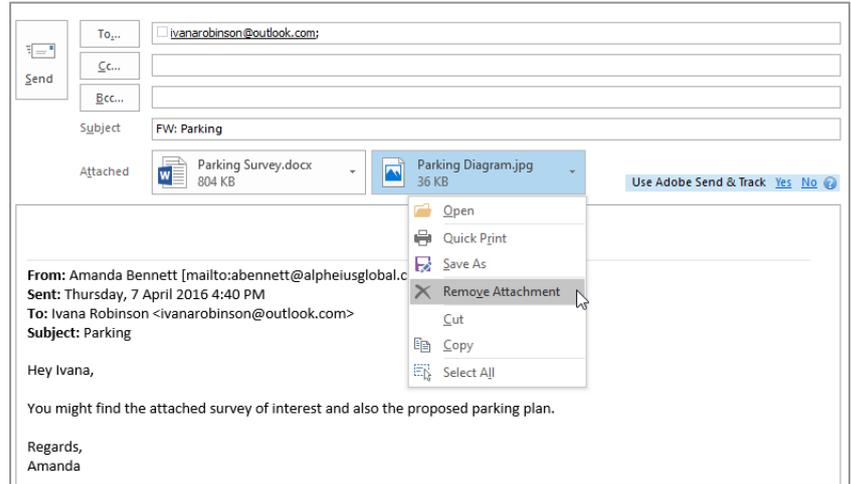
relevant to the people to whom you are forwarding the message, you can remove them from the message before forwarding it.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 In the message list, double click on the message from **Amanda Bennett** with the **Parking** subject
 - 2 Click on **Forward** in the **Respond** group, then address the message to either yourself or one of your colleagues
 - 3 Right-click on the **Parking Diagram.jpg** attachment in the message header and select **Remove Attachment** as shown
- The attachment file will disappear from the Attached box...*
- 5 Select all of the text in the message, press **Del**, then type **Can you please review the attached parking survey?**
 - 6 Press **Esc**, then click on **[Yes]** to close the message and save it in the **Drafts** folder



For Your Reference...

To **remove** an **attachment** from a **message**:

1. Open the message with the attachment
2. Right-click on the attachment
3. Select **Remove**

Handy to Know...

- You can remove an attachment from an open message by highlighting the attachment file's name and pressing **Del**.
- You can view options for what to do with an attachment by right-clicking on the attachment and selecting an option.

CHAPTER 6

ORGANISING MESSAGES

InFocus

Outlook provides a number of tools and features for organising your email messages. For example, you can delete messages and move and copy messages to your own custom mail folders. You can also use quick styles to perform multiple step functions on your messages with a single click, plus more.

In this session you will:

- ✓ learn how to create a mail folder
- ✓ learn how to move messages into other mail folders
- ✓ learn how to copy messages between folders
- ✓ learn how to delete messages
- ✓ learn how to recover messages from the **Deleted Items** folder
- ✓ learn how to clean up conversations
- ✓ learn how to work with the **Favourites** folder list
- ✓ learn how to delete message folders
- ✓ learn how to recover deleted folders
- ✓ learn how to empty the **Deleted Items** folder
- ✓ gain an understanding of quick steps
- ✓ learn how to customise default quick steps
- ✓ learn how to create a new quick step
- ✓ learn how to use quick steps
- ✓ learn how to archive messages
- ✓ learn how to recover archived messages.

CREATING A MESSAGE FOLDER

A message folder is a repository for mail messages. There are a number of standard message folders in the mailbox including the **Inbox**, **Outbox**, **Sent Items**, **Deleted Items**, and

so on. You can create additional message folders to store your messages. For example, if you are involved in several projects, you could create a folder for each project to store messages.

Try This Yourself:

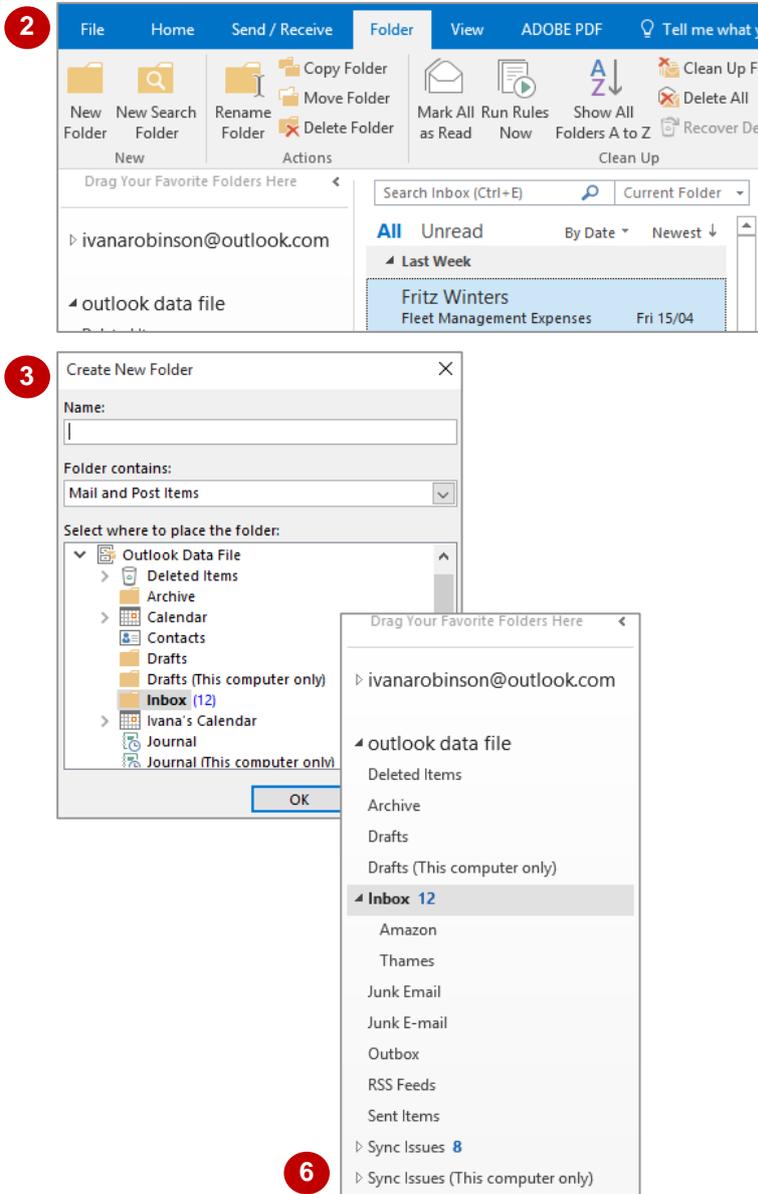
Open File

Before starting this exercise you **MUST** open the file *Outlook_14.pst...*

- 1 In the **Folder** pane, ensure the outlook data file is expanded, then click on **Inbox** under **outlook data file**

Let's create two new folders for the Amazon and Thames projects...

- 2 Click on the **Folder** tab to see the commands you can use with Outlook folders
- 3 Click on **New Folder** in the **New** group to open the **Create New Folder** dialog box
- 4 Type **Thames** in **Name**, then ensure that **Inbox** is selected under **Outlook Data File** in **Select where to place the folder**
- 5 Click on **[OK]** to add the new folder under **Inbox**
- 6 Repeat steps 2 to 5 to create a new folder called **Amazon** in the **Inbox**



For Your Reference...

To **create** a **new message folder**:

1. Click on the **Folder** tab, then click on **New Folder** in the **New** group
2. Type the name of the new folder and choose where to place the folder
3. Click on **[OK]**

Handy to Know...

- You can also create a new mail folder by right-clicking on an existing folder in the **Folder** pane and selecting **New Folder**.

MOVING MESSAGES

Outlook lets you easily move messages between folders – such as new folders that you have created or existing ones. There are several ways to move messages from one folder to another.

Here we will show you how to use the **Move** command on the ribbon as it allows you to move messages easily into folders anywhere in your Outlook system.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 Ensure that **conversations** is enabled, then click on the **Home** tab

You can enable conversations by clicking on the **View** tab and selecting **Show as Conversations** in the **Messages** group...

- 2 Under **outlook data file**, click on **Inbox**, then click on the **Thames** conversation

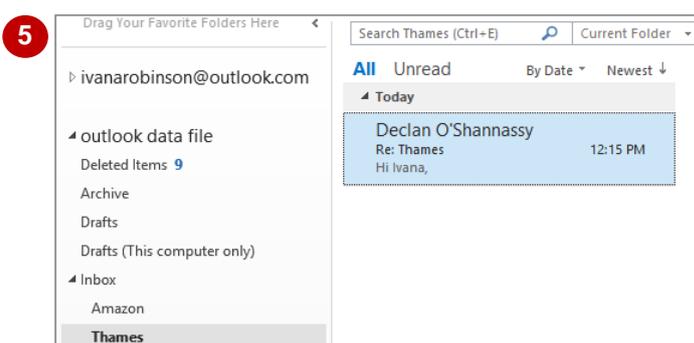
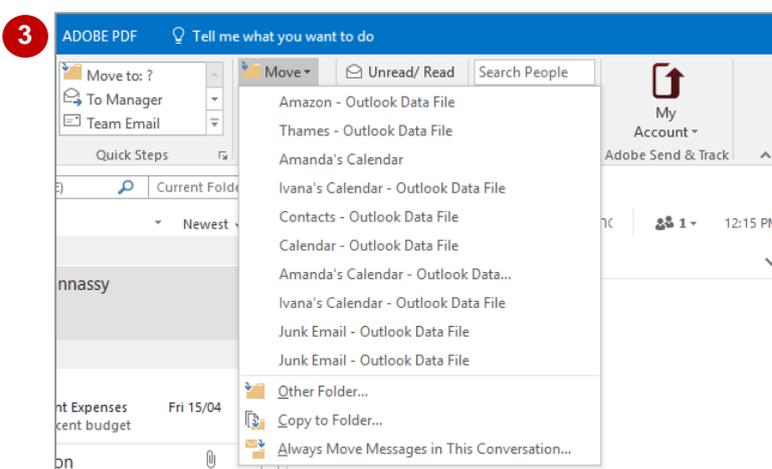
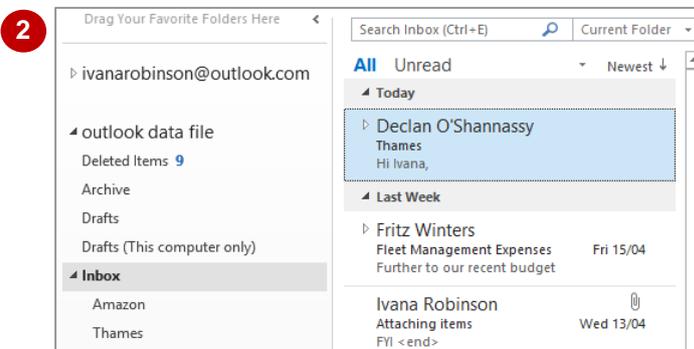
This is the email from Declan O'Shannassy with the Subject: Thames...

- 3 Click on **Move** in the **Move** group, as shown, to display a list of folders that you have visited recently

Your list may be different to the one shown...

- 4 Click on **Thames – outlook data file** to move the message to this folder

- 5 Click on **Thames** in the **Folder** pane to see the message in this folder



For Your Reference...

To **move messages**:

1. Select the messages to move
2. Click on the **Home** tab, then click on **Move** in the **Move** group
3. Click on the desired folder

Handy to Know...

- You can drag messages between folders in the message list and from a folder to a folder icon in the **Folder** pane.
- You can drag and drop folders to new locations in the same way that you can drag and drop mail messages. Any items within a moved folder will move with the folder.

COPYING MESSAGES

If you want to place a copy of a message in more than one location, Outlook allows you to copy messages between folders. And just like many other functions, there is more than one way in

which you can perform this feat. You can use the ribbon, drag and drop, or the keyboard shortcut combination - **Ctrl** + **C** and **Ctrl** + **V**.

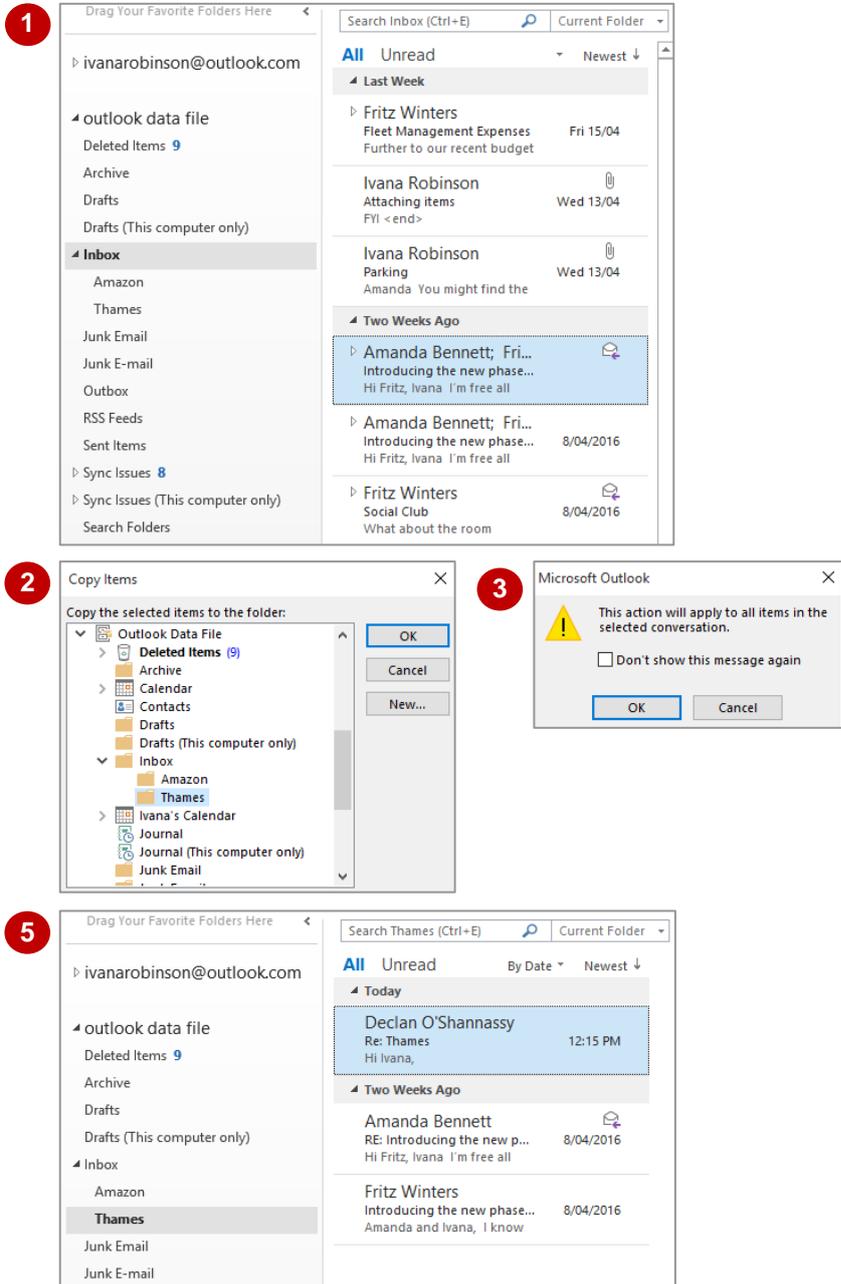
Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 Under **outlook data file** click on **Inbox**, then click on the **Introducing the new phase** conversation
- 2 On the **Home** tab, click on **Move** in the **Move** group, then select **Copy to Folder** to open the **Copy Items** dialog box
- 3 Ensure that **Thames** is selected under **Inbox**, then click on **[OK]**

Because this is a conversation, a message may display...
- 4 Click on **[OK]** to copy the conversation to the folder
- 5 Click on **Thames** in the **Folder** pane to see the messages in the message list



For Your Reference...

To **copy messages**:

1. Select the messages
2. Click on **Move** in the **Move** group, then select **Copy to Folder**
3. Click on the name of the destination folder, then click on **[OK]**

Handy to Know...

- You can copy messages between folders using the drag and drop method. To do this, select the messages to be copied in the message list, and then press **Ctrl** while you drag them to a new folder in the **Folder** pane.

DELETING MESSAGES

It is good housekeeping practice to purge your folders of unwanted messages. You can do this by **deleting** them. Deleting messages works a little like the **Recycle Bin** in Windows – when you

delete a message, or in fact anything in Outlook, the deleted item is moved into a special **Deleted Items** folder rather than being actually deleted.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

1

Under **outlook data file** click on **Inbox**, then click on the **Attaching Items** message in the message list

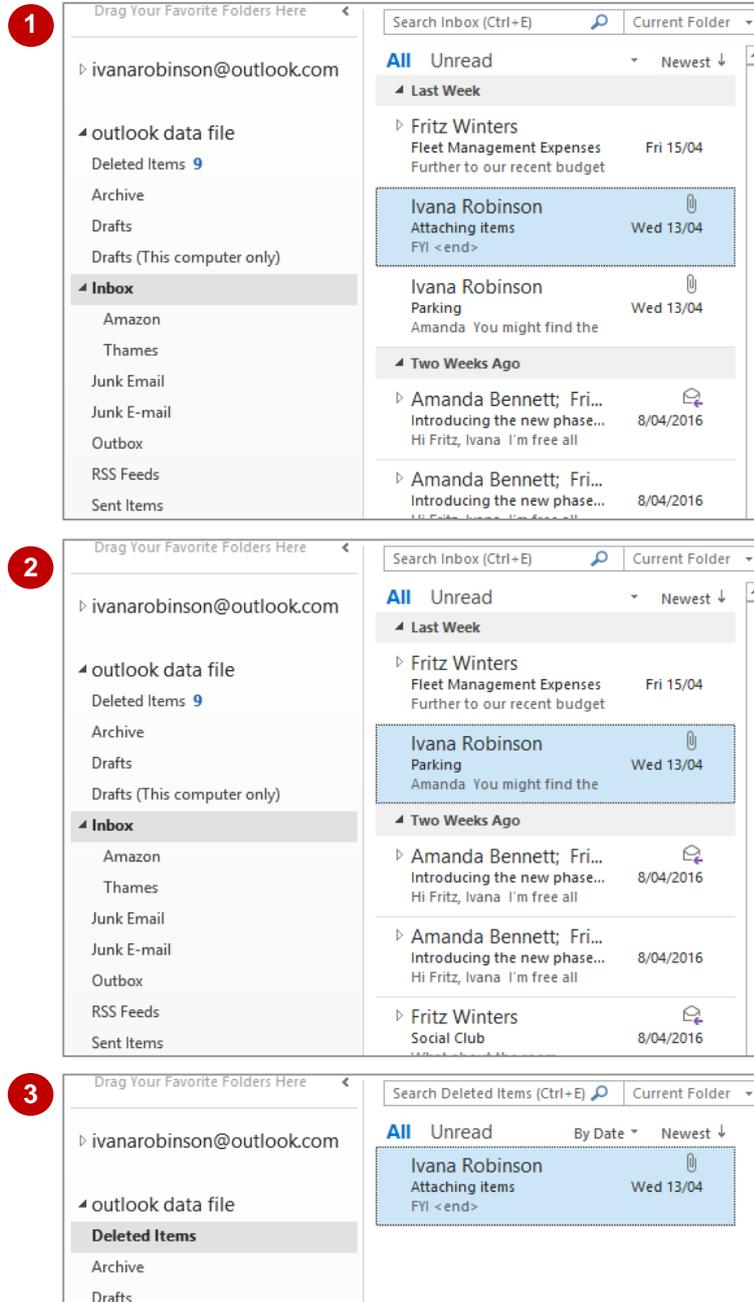
2

On the **Home** tab, click on **Delete** in the **Delete** group

The message will be deleted from the **Inbox**...

3

In the **Folder** pane under **Outlook_14**, click on **Deleted Items** to see the deleted message



For Your Reference...

To **delete** a **message**:

1. Select the messages you wish to delete in the message list
2. Click on the **Home** tab, then click on **Delete** in the **Delete** group

Handy to Know...

- If you delete items from the **Deleted Items** folder, they will be permanently removed from Outlook.
- You can permanently delete a selected message from any folder by pressing **Shift + Del**. A message asking you to confirm your intention will appear.

RECOVERING DELETED MESSAGES

When you delete a message from all folders except **Deleted Items**, they will be automatically removed from the folder and added to the **Deleted Items** folder. If you change your mind or

if you realise that you deleted the wrong message, you can recover a message from **Deleted Items** and move it back to the original folder.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 In the **Folder** pane ensure **Deleted Items** is selected, then click on the **Attaching Items** message in the message list to select it

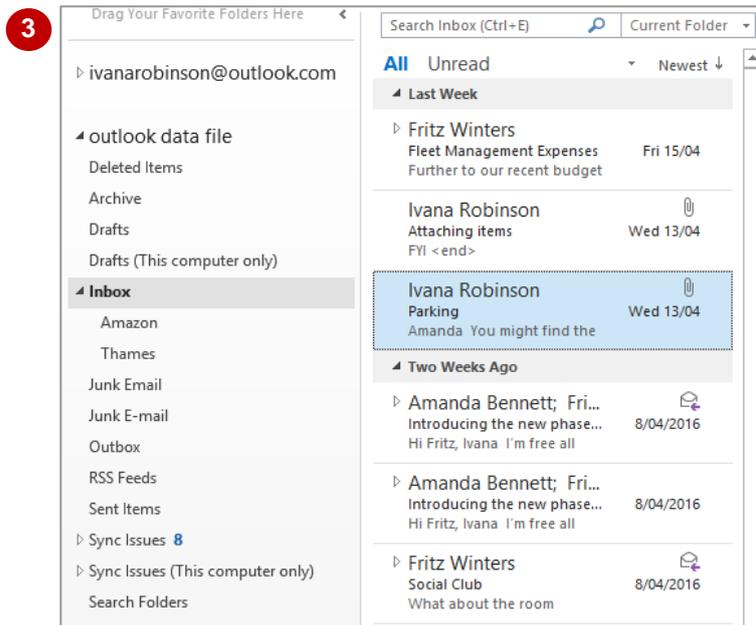
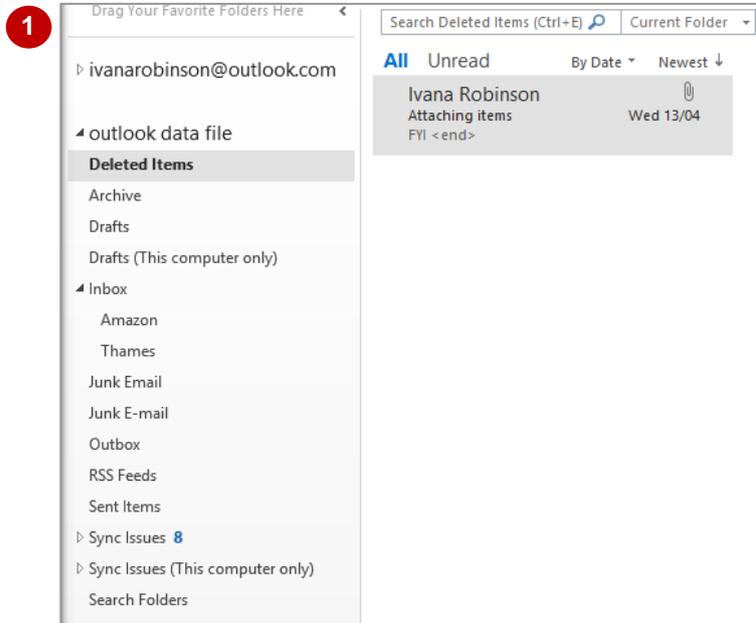
Let's return this message to the Inbox...

- 2 Right-click on the **Attaching Items** message and point to **Move** then select **Inbox – outlook data file**

If **Inbox – outlook data file** isn't listed, click on **Other Folder**, select **Inbox** under **outlook data file** and click on [OK].

The message will disappear from the **Deleted Items** folder...

- 3 In the **Folder** pane, click on **Inbox** to ensure the message has reappeared again in the message list



For Your Reference...

To **recover deleted messages**:

1. Click on **Deleted Items** in the **Folder** pane
2. Select the required messages in the message list
3. Right-click on a selected message and select **Move > folder name**

Handy to Know...

- You can delete or recover multiple messages simultaneously. To do this, click on the first message, then press **Ctrl** and click on the desired messages. Press **Del** to delete them or right-click on them and select **Move > folder name** to recover deleted messages.

CLEANING UP CONVERSATIONS

Because each message in a conversation includes earlier messages, all messages other than the most recent one (or one for each branch if a conversation has split) are redundant.

Therefore the **Clean Up** function moves all messages in a conversation (except for messages that have not been read, are flagged or include attachments) to the **Deleted Items** folder.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

1 In the **Folder** pane, under **outlook data file**, click on **Inbox**, then expand the **Social Club** conversation
It has five messages...

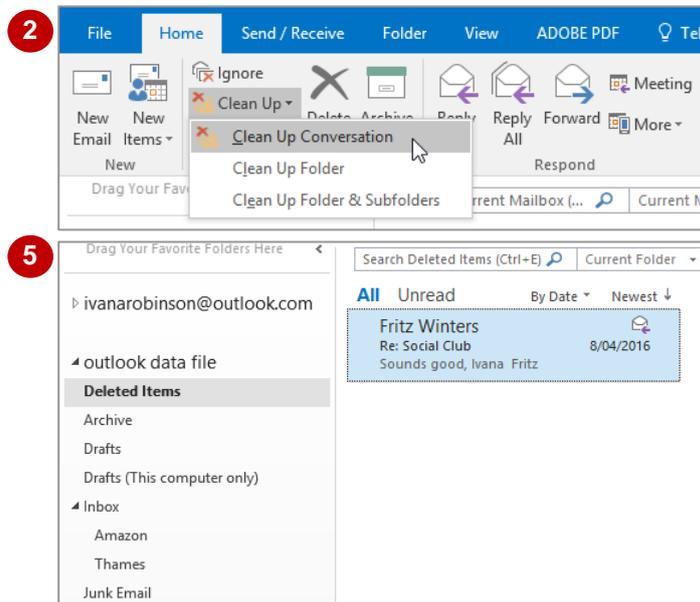
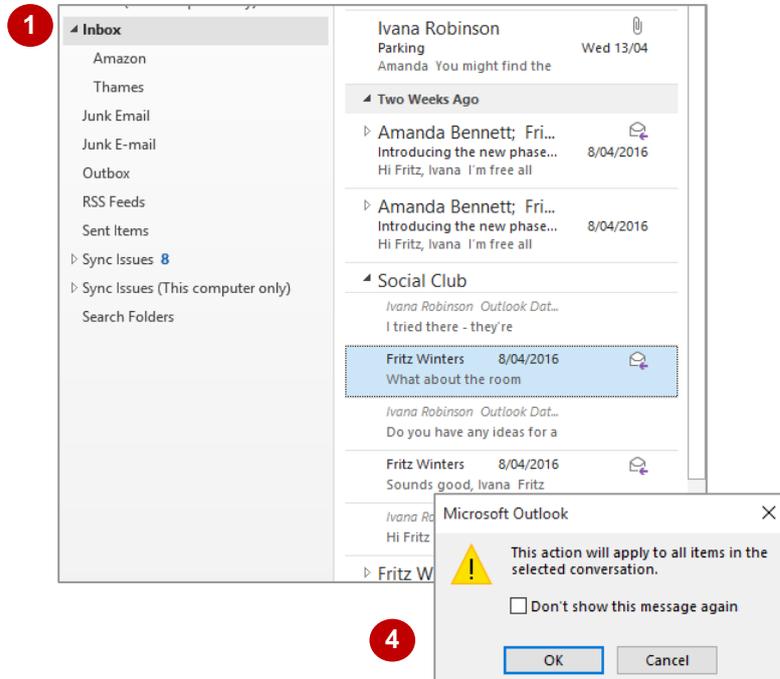
2 Collapse the conversation, then on the **Home** tab, click on **Clean Up** in the **Delete** group and select **Clean Up Conversation**

A message may appear...

3 Click on **[Clean Up]**
Another message may appear...

4 Click on **[OK]**
Now only the final message in the conversation remains in the Inbox...

5 In the **Folder** pane, click on **Deleted Items** in the to see the redundant messages in the message list



For Your Reference...

To **clean up** a **conversation**:

1. Click on the conversation
2. On the **Home** tab, click on **Clean Up** in the **Delete** group
3. Select **Clean Up Conversation**

Handy to Know...

- If you have numerous conversations in a folder, you can use the **Clean Up Folder** or **Clean Up Folder & Subfolders** options on **Clean Up** to clean them simultaneously.

WORKING WITH FAVOURITES

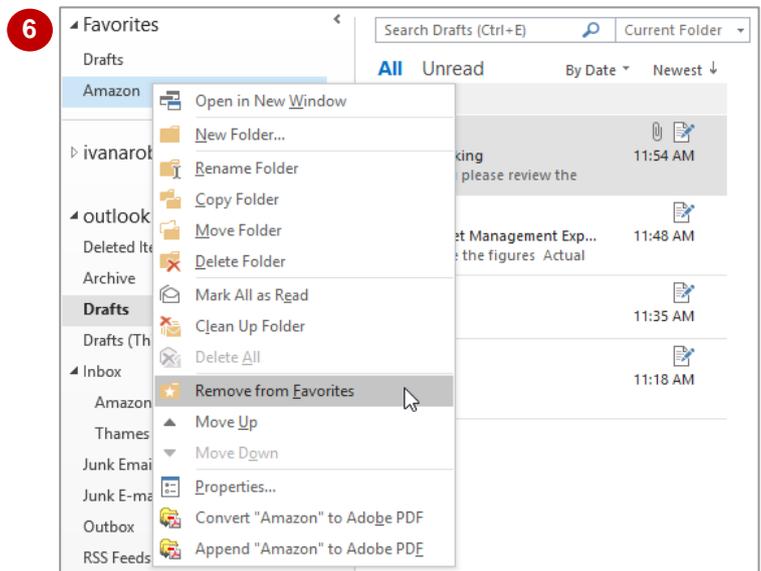
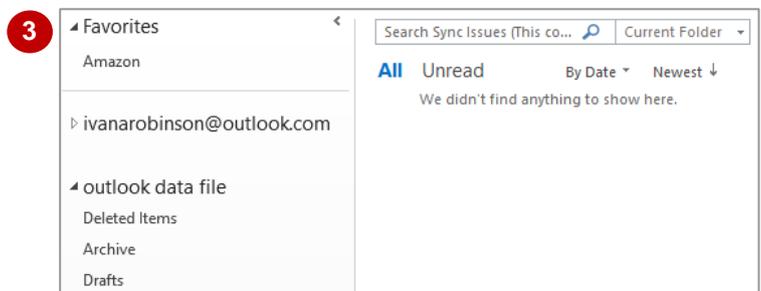
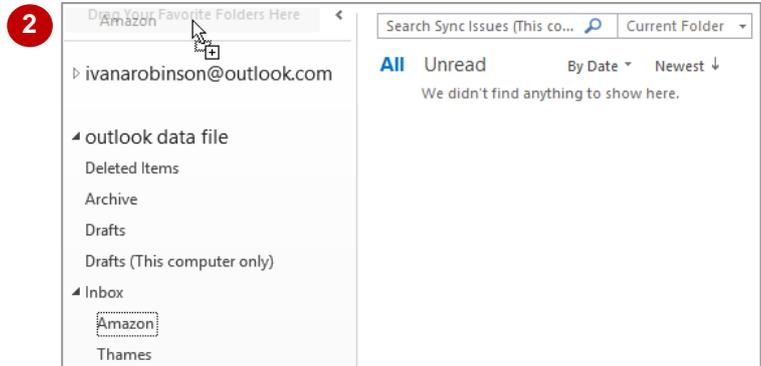
The **Favourites** folders provide a useful way to ensure that the folders you use regularly are easily accessible. They appear at the top of the **Navigation** pane. Another nifty thing about the

Favourites folders is that you can organise the folder list in an order that suits you – the folders are not automatically positioned in alphabetical order as they are in the other panes.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 View the **Favourites** folders list at the top of the **Folder** pane to see what it contains
At the moment it contains no folders. Let's add some...
- 2 Under **outlook data file**, click on **Amazon** then drag upwards to the **Favourites** section as shown
Amazon will appear at the bottom of Favourites as well as in the original location...
- 3 Release the mouse button to position the **Amazon** folder in **Favourites**
Notice the Favourites name now appears...
- 4 Repeat step 2 to add **Drafts** to **Favourites**
Let's re-order the folders in the Favourites list...
- 5 Click on and drag **Drafts** to the top of the folders list in **Favourites** so it appears as shown
You can remove folders just as easily...
- 6 Right-click on **Amazon** and select **Remove from Favourites**
- 7 Repeat step 5 to remove **Drafts** as well



For Your Reference...

To **work** with the **Favourites folders list**:

- Right-click on a folder and select **Show in Favourites**
- Drag the folder to the desired location in the folder list
- Right-click on a folder and select **Remove from Favourites**

Handy to Know...

- The **Favourites** folders list can have top-level folders only, not subfolders.
- When the **Folder** pane is minimised each folder in **Favourites** will appear in its own vertical folder button. The length of each button is determined by its folder name so keep them short.

DELETING MESSAGE FOLDERS

Just like managing your messages, you should take care that the folders you create don't get out of hand. Otherwise, you'll spend a significant amount of time looking for emails that you think

you've kept – somewhere! You can tidy up your mail storage area by deleting unwanted and redundant folders

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 In the **Folder** pane, under **outlook data file**, double-click on **Thames** in the **Inbox** to ensure that the folder is selected

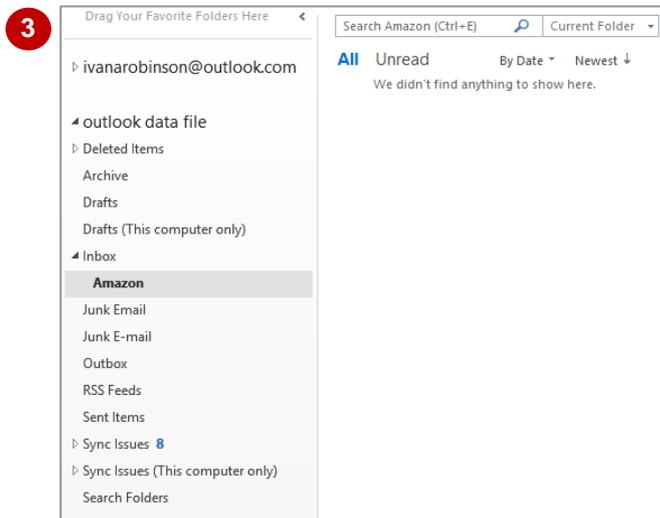
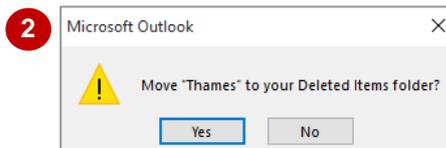
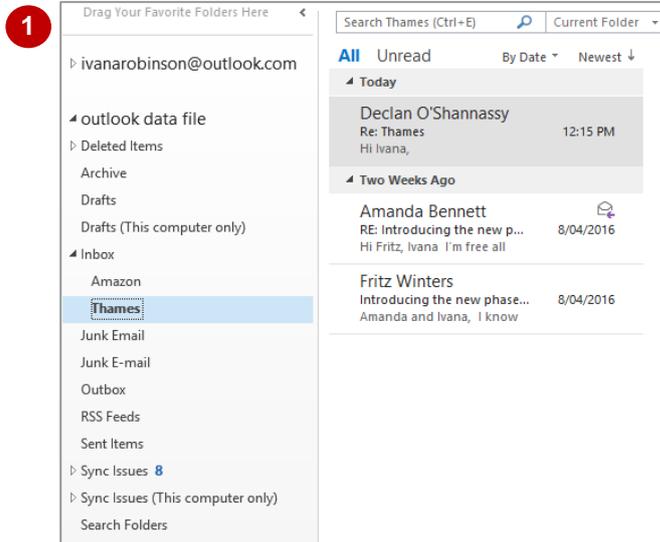
The folder name must be highlighted in blue to be selected, not grey...

- 2 Click on the **Folder** tab, then click on **Delete Folder** in the **Actions** group

Outlook will ask you to confirm your intention of deleting the folder...

- 3 Click on **[Yes]** to delete the folder

Actually, the folder plus its messages are simply relocated to the Deleted Items folder



For Your Reference...

To **delete** a **message folder**:

1. Double-click on the folder in the **Folder** pane
2. Click on **Delete Folder** in the **Actions** group on the **Folder** tab
3. Click on **[Yes]**

Handy to Know...

- You can also delete a message folder by right-clicking on it in the **Folder** pane and selecting **Delete Folder**.

RECOVERING DELETED FOLDERS

Sometimes, you inadvertently delete the wrong folder or you simply just want to access a folder that you previously deleted. Whatever the reason Outlook allows you to recover previously deleted

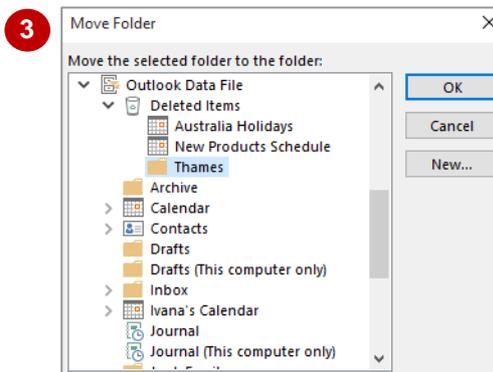
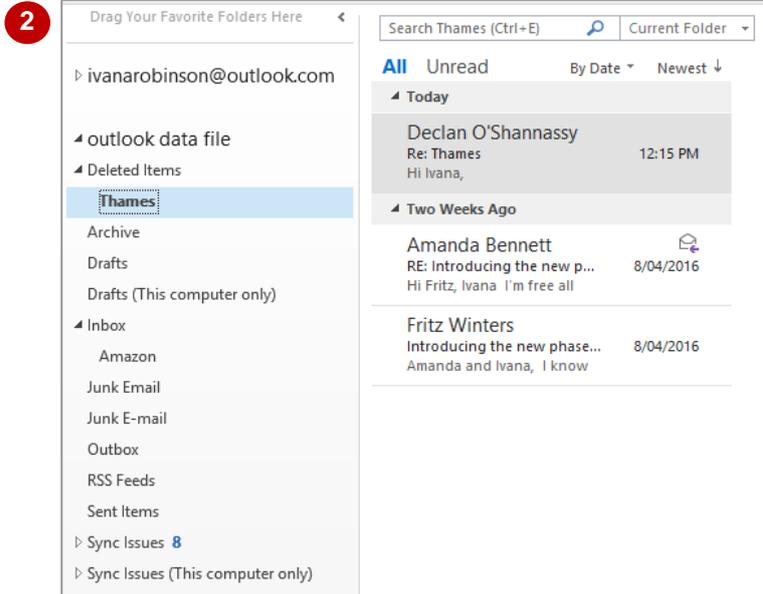
folders and their content, providing they are still in the **Deleted Items** folder.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 In the **Folder** pane, under **outlook data file**, double-click on **Deleted Items** to expand the folder
- 2 Double-click on **Thames** under **Deleted Items** to select the folder
The folder name must be highlighted in blue to be selected, not grey...
- 3 Click on **Move Folder** in the **Actions** group to open the **Move Folder** dialog box
- 4 Click on **Inbox** in the **outlook data file** folder to nominate it as the destination folder and click on **[OK]**



For Your Reference...

To **recover a deleted folder**:

1. Double-click on the folder in **Deleted Items**
2. Click on **Move Folder** in the **Actions** group
3. Click on the destination folder
4. Click on **[OK]**

Handy to Know...

- When you recover a deleted folder, all messages in the folder will be recovered as well as the folder itself.

EMPTYING DELETED ITEMS

When you delete a message (or most other items for that matter) it is normally placed in the **Deleted Items** folder. This is like the last staging post where you can, if necessary, recover

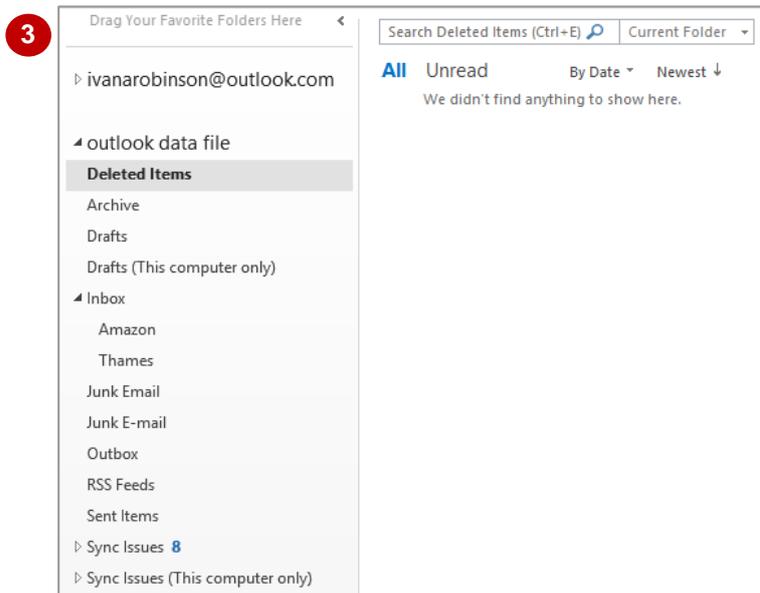
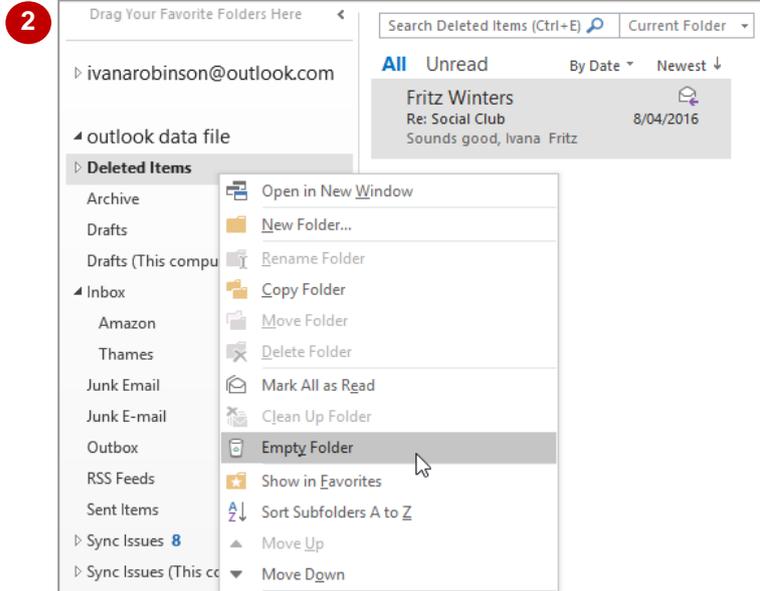
deleted items. But, without regular maintenance this folder will become full of unnecessary items and should be emptied periodically.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 In the **Folder** pane, under **outlook data file**, click on **Deleted Items** to see the contents of this folder in the message list
- 2 Right-click on **Deleted Items** and select **Empty Folder**
Outlook will ask you to confirm your intention of emptying the folder...
- 3 Click on **[Yes]** to permanently delete the files in **Deleted Items**



For Your Reference...

To **empty** the **Deleted Items folder**:

1. In the **Folder** pane, right-click on **Deleted Items**
2. Select **Empty Folder**
3. Click on **[Yes]**

Handy to Know...

- You can set Outlook to automatically delete **Deleted Items** whenever you exit Outlook. Click on the **File** tab, click on **Options** to open the **Options** dialog box, then click on the **Advanced** category. Tick **Empty Deleted Items folder when exiting Outlook** under **Outlook start and exit**

AUTOMATING COMMON TASKS WITH QUICK STEPS

Many emails you receive involve more steps than simply reading them and leaving them in your Inbox. Sometimes you may need to move them to another folder, create a meeting or

appointment, forward them to other members of your team, or any combination of a number of tasks. Using Outlook's **Quick Steps**, you can perform multiple tasks with a single click.

Outlook's Default Quick Steps

Outlook ships with a set of five default quick steps in the **Quick Steps** gallery on the **Home** tab as shown to the right. You can customise these, plus create your own custom quick steps.

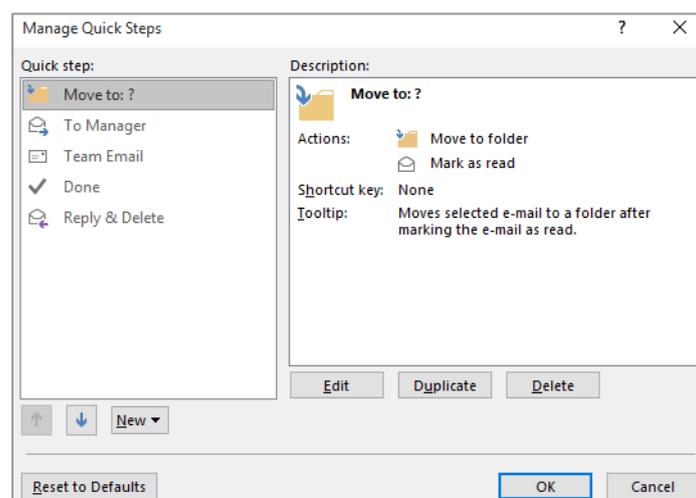
The default quick steps allow you to perform the following actions.

- Move to** Moves the selected message to a mail folder you specify and marks the message as read.
- To Manager** Forwards the message to your manager. If your company uses Microsoft Exchange Server, your Manager's name will be detected in the global address list and inserted into **To**, or you can specify the recipient.
- Team E-mail** Forwards the message to others in your team. If your company uses Microsoft Exchange Server, your team members' names will be detected in the global address list and inserted into **To**, or you can specify the recipients.
- Done** Moves the message to a specified mail folder, marks the message as complete and then marks the message as read.
- Reply & Delete** Opens a reply to the selected message and then deletes the original message.
- Create New** This tool lets you create a new quick step to execute any sequence of commands and name it.

The first time you click on the default quick steps, other than **Reply & Delete**, a dialog box will display allowing you to customise the quick step to suit your needs.

Customising Quick Steps

You can customise any quick step – not just the default quick steps. You do this by selecting **Manage Quick Steps** in the expanded **Quick Steps** gallery to open the **Manage Quick Steps** dialog box (as shown below). From this dialog box you can create new quick steps and edit, duplicate and delete existing quick steps.



CUSTOMISING A DEFAULT QUICK STEP

Outlook has introduced **Quick Steps** to help you manage and organise your messages. To get you started they have provided five default quick steps (plus **Create New**) for performing some of

the most common Outlook tasks. When you first click on a default quick step, other than **Reply & Delete**, you will be prompted to customise it to best fit your working style.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Ensure **Inbox** is selected. Click on the **Home** tab, then click on **Move to** in the **Quick Steps** gallery to open the **First Time Setup** dialog box.

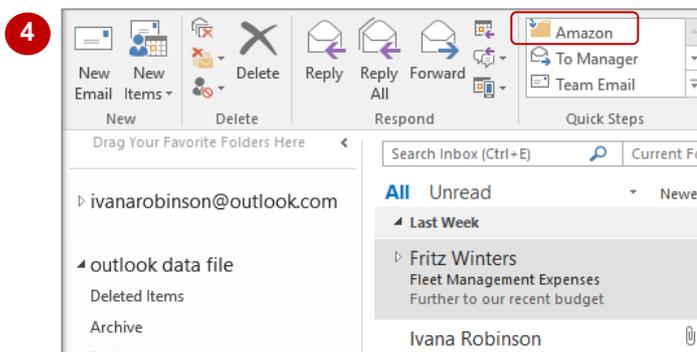
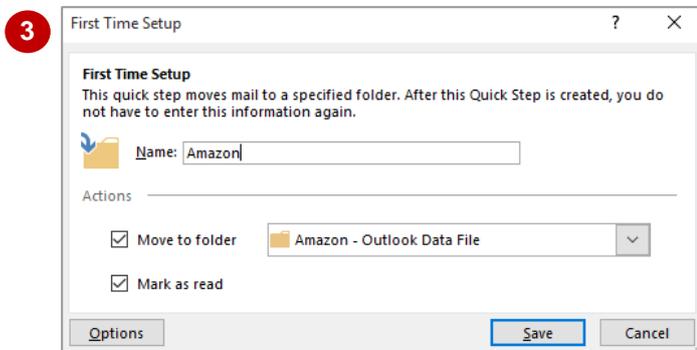
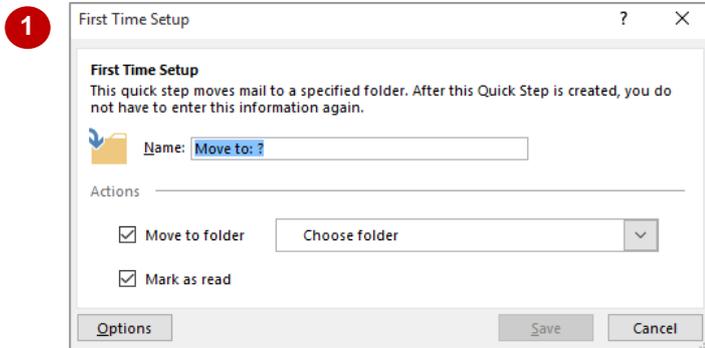
If the default Quick Steps do not appear in the Quick Step gallery you may wish to reset the default Quick Steps. To do this, display the Manage Quick Steps dialog box and click on [Reset to Defaults], then click on [Yes]...

- 2 Click on the drop arrow for **Move to folder** and select **Amazon – Outlook Data File**.

The folder you select here will automatically appear in Name. Let's change it to something more appropriate since this is the name that will be listed in the Quick Steps gallery...

- 3 Select the contents in **Name**, then type **Amazon**.
- 4 Ensure that **Mark as read** is ticked, then click on [Save].

The default Move to quick step will now appear as Amazon.



For Your Reference...

To **customise** a **default quick step**:

1. Click on the **Home** tab, then click on the default Quick Step.
2. Set the options as desired.
3. Click on [Save].

Handy to Know...

- You can customise any quick step by clicking on the **More** arrow for **Quick Steps** and selecting **Manage Quick Steps** to open the **Manage Quick Steps** dialog box. Here you can choose to edit, duplicate or delete an existing quick step, or create a new quick step.

CREATING A QUICK STEP

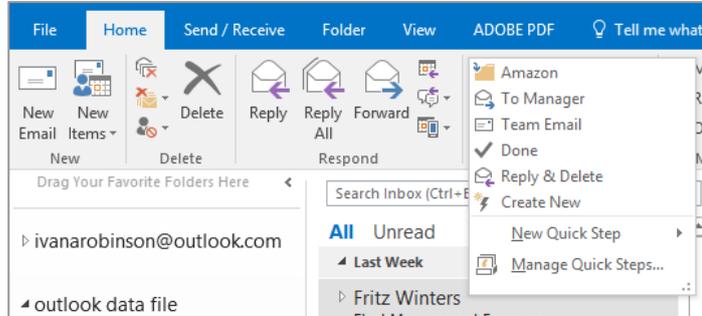
Quick steps enable you to simultaneously apply multiple actions to a selected message. This can help you to quickly manage your mailbox. Creating new quick steps is simple. You can

create them by specifying all actions (as you will do in this exercise), by selecting a particular type of quick step to create (such as a **Forward To**), or by duplicating and changing an existing quick step.

Try This Yourself:

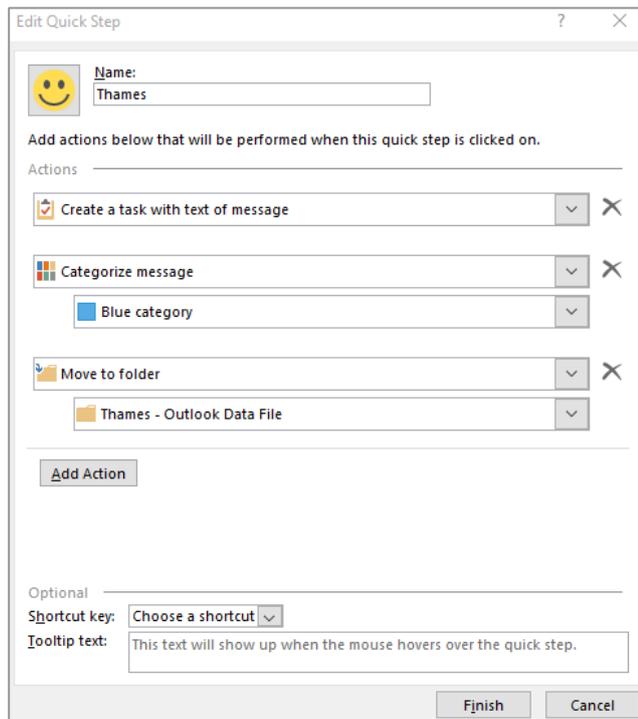
Continue using the previous file with this exercise...

- 1 Ensure **Inbox** is selected, the **Home** tab, click on the **More** arrow for **Quick Steps** to open the **Quick Steps** gallery
- 2 Click on **Create New** to open the **Edit Quick Step** dialog box
- 3 Type **Thames** in **Name**, then click on the large square to the left of **Name** to open the **Choose an icon** dialog box
- 4 Click on the smiley face, then click on **[OK]** to change the icon
- 5 Click on the drop arrow for **Choose an Action** and select **Create a task with text of message**
- 6 Click on **[Add Action]** and repeat step 5 to add two actions: **Categorise message (Blue category)** and **Move to folder (Thames – Outlook Data File)**
If the Thames folder does not display click on Other Folder then select Thames and click on [OK]
- 7 Click on **[Finish]** to add the new quick step to the top of the **Quick Steps** gallery



1

6



For Your Reference...

To **create a quick step**:

1. Click on **Create New** in the **Quick Steps** gallery
2. Type a **Name** and select an **icon** (optional)
3. Select an action in **Choose an Action**
4. Click on **[Add Action]** as needed
5. Click on **[Finish]**

Handy to Know...

- If you want to create a quick step that is very similar to an existing one, select **Manage Quick Steps** in the gallery, click on the existing quick step and click on **[Duplicate]**. You can then modify the details as desired.
- You can also create a quick step by selecting **New Quick Step** in the **Quick Steps** gallery.

USING QUICK STEPS

When you work with your emails, you will find that you tend to do many repetitive tasks. For instance, you might move all messages relating to a specific project to a folder for that project, or

you may often forward copies of important messages to your manager. Using **quick steps**, you can perform repetitive tasks such as these, and more, with a single click.

Try This Yourself:

Continue using the previous file with this exercise...

1 In the message list, click on the **Introducing the new phases** conversation, then click on the **Amazon** quick step in the **Quick Steps** group

Being a conversation, a message may appear...

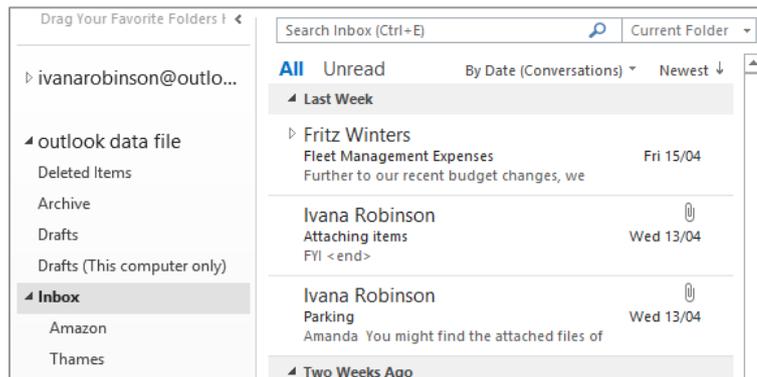
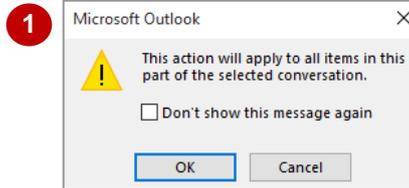
2 Click on **[OK]**

All messages in the conversation will be moved to the Amazon folder...

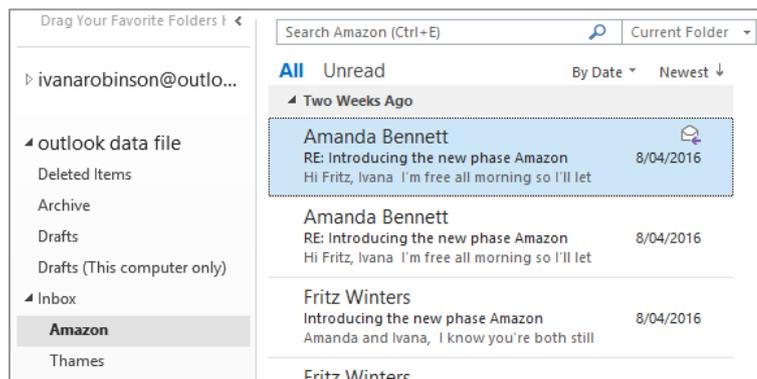
3 Click on **Amazon** in the **Folder** pane to see the two messages

4 In the **Folder** pane click on **Inbox**, click on **Thames** in the message list, then click on the **Thames** quick step in the **Quick Steps** group

A message will appear saying that the Tasks folder cannot be found. This is because we have created it within an outlook data file. Normally a task would be created and



2



3

For Your Reference...

To **use** a **quick step**:

1. Select the message in the message list
2. Click on the quick step in the **Quick Steps** gallery

Handy to Know...

- To make a quick step's function clearer, you can add a tooltip that will appear when you hover over it in the **Quick Steps** gallery. You can do this by typing the desired text in **Tooltip Text** at the bottom of the **Edit Quick Step** dialog box either when you create a quick step or by editing it later.

ARCHIVING MESSAGES

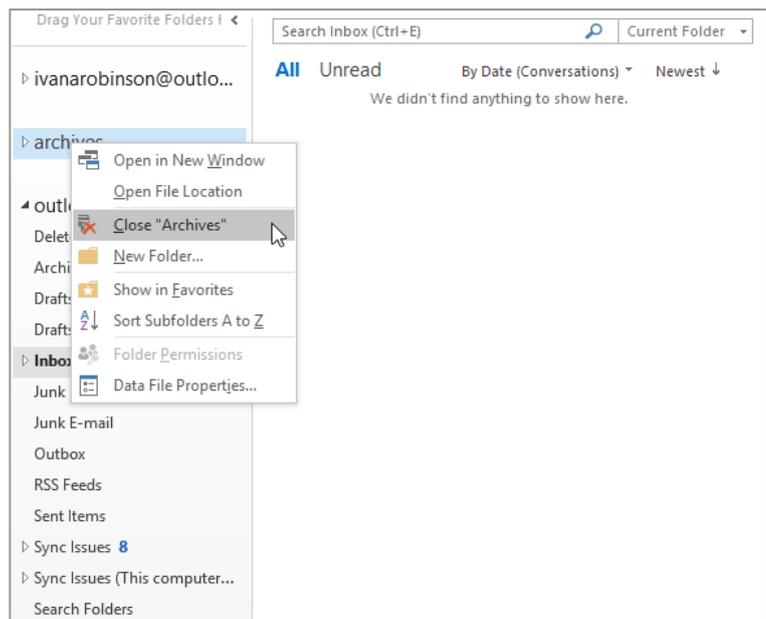
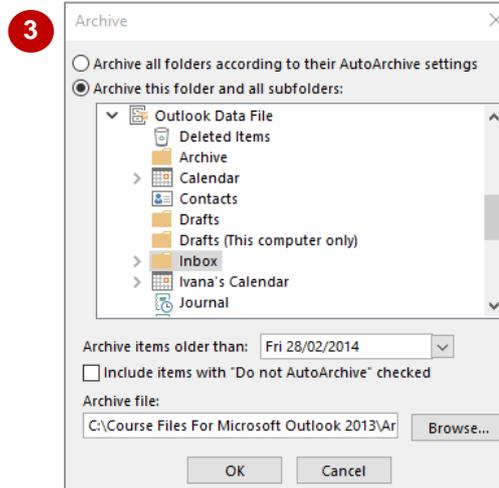
Over a period of time your mailbox folders will begin to grow as they fill with messages – especially the **Inbox**. You can of course elect to delete messages. But, as an alternative you can

archive messages to a file. This will enable you to retrieve those messages again in the future should the need arise.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 In the **Folder** pane click on **Inbox**, then click on the **File** tab to open the **Backstage**
- 2 Click on **[Tools]** and select **Clean up old items** to open the **Archive** dialog box
- 3 Scroll down to and click on **Inbox** under **Outlook Data File**
You might have to expand the outlook data file folder first...
- 4 Click on the drop arrow for **Archive items older than** and click on **[Today]**
- 5 Click on **[Browse]** to open the **Open Outlook Data Files** dialog box, and then navigate to the course files folder
- 6 Ensure **Archive_1** appears in **File name** and click on **[OK]** to return to the **Archive** dialog box
- 7 Click on **[OK]**
All messages received before today will be removed from the Inbox and included in the newly created archive file, Archive_1.pst...
- 8 Press **[Esc]** to return to the Inbox, then right-click on **Archives** in the **Folder** pane and select **Close "Archives"**



For Your Reference...

To **archive messages**:

1. Click on the **File** tab
2. Select **[Cleanup Tools] > Archive**
3. Specify the date
4. Specify the archive file name and location
5. Click on **[OK]**

Handy to Know...

- You can set older Outlook items to be archived automatically on a regular interval. To do this click on the **File** tab, click on **Options** and select the **Advanced** category. Click on **[AutoArchive Settings]**.

RECOVERING ARCHIVED MESSAGES

If you have archived your email messages properly into Outlook archive data files and you know exactly where they are located, it is relatively easy to recover archive files. This might

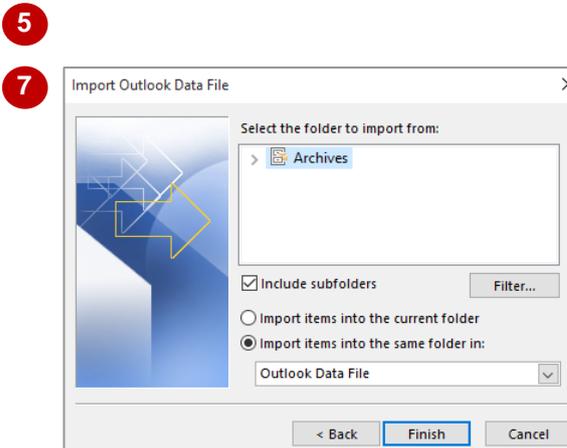
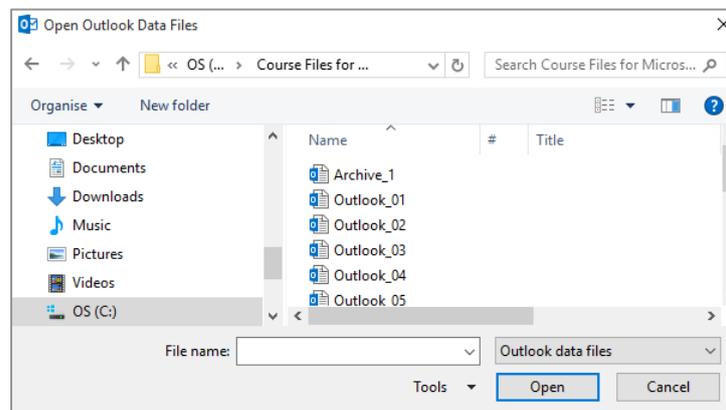
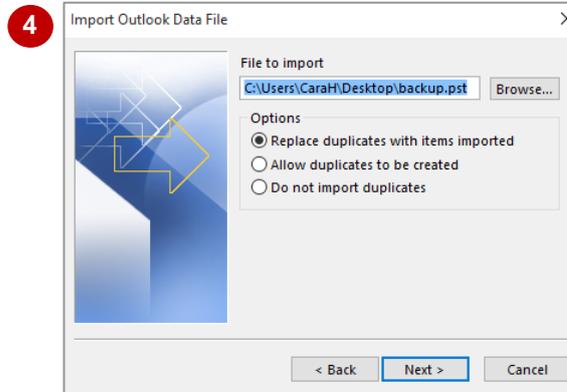
be useful if you need to locate a message from a while ago that may have just recently come into contention again.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 In the **Folder** pane click on **Inbox** then click on the **File** tab to open the **Backstage**
- 2 Click on **Open & Export** then click on **Import/Export** to open the **Import and Export Wizard**
- 3 Ensure that **Import from another program or file** is selected, then click on **[Next]**
- 4 Click on **Outlook Data File (.pst)** and click on **[Next]**
- 5 Click on **[Browse]** and navigate to the course files folder
- 6 Click on **Archive_1.pst** and click on **[Open]**
- 7 Click on **[Next]** to specify the folder into which the data will be imported
- 8 Expand **Archives**, then click on **Inbox** and click on **[Finish]** to complete the import operation



For Your Reference...

To **recover archived messages**:

1. Select **File > Open > Import**
2. Select **Import from another program or file** and **Outlook Data File (.pst)**
3. Locate and open the archive file
4. Select the folder and click on **[Finish]**

Handy to Know...

- To ensure you have the best chance for finding the right archive file and as quickly as possible, clearly name all archive files.

NOTES:



CHAPTER 7 SEARCHING

InFocus

Because email can be used to communicate about any number of different subjects, Outlook provides a powerful search feature that you can use to quickly and easily locate messages and other Outlook items.

In this session you will:

- ✓ learn how to use the **Instant Search** feature
- ✓ learn how to expand a search
- ✓ gain an understanding of the search query syntax used for finding messages
- ✓ gain an understanding of the search query syntax that will find messages by either date or file size
- ✓ learn how to run a recently-used search
- ✓ learn how to use the search options
- ✓ learn how to search for other **Outlook** items
- ✓ learn how to use a search folder
- ✓ learn how to customise predefined search folders
- ✓ learn how to create a custom search folder.

USING INSTANT SEARCH

Instant Search helps you to quickly find items in Outlook. You don't even need to type the exact term you're looking for in the **Instant Search** box, just part of it, and Outlook will highlight each

instance of matching text as it finds it. This is known as performing an incremental search. **Instant Search** is available in all areas of Outlook including Mail, Calendar, Contacts and Tasks.

Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file *Outlook_15.pst...*

1 Ensure **outlook data file** is expanded in the **Folder** pane, then click on **Inbox**

Let's search this folder...

2 Click on the **View** tab and ensure **Show as Conversations** in the **Messages** group is not ticked

3 Click on **Search Inbox (Ctrl + E)** which is located above the message list and type **prod**

This box is the **Instant Search** box.

All messages containing 'prod' will be listed. Let's append additional search criteria to narrow-down the search...

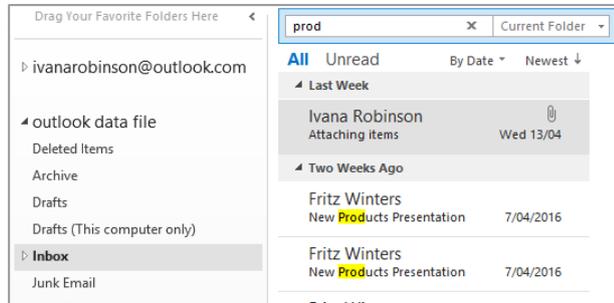
4 Type **+dublin** now only the messages with both terms will be listed

5 Press **Space** and type **-Amanda**

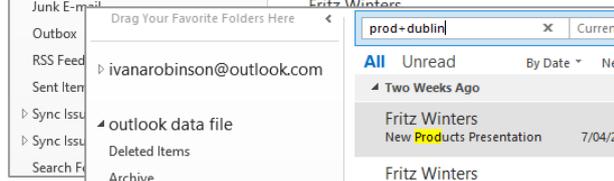
You must press **Space** prior to the minus sign. Now only messages containing both 'prod' and 'dublin' but not 'amanda' will be listed...

6 Click on **Close Search** to turn off **Instant Search**

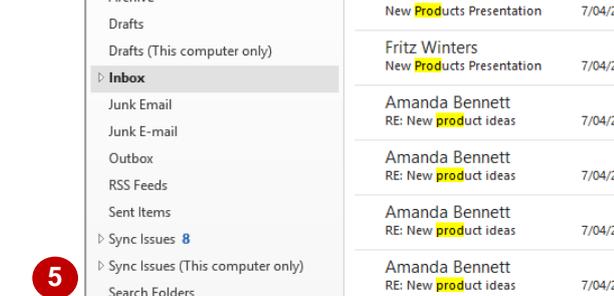
3



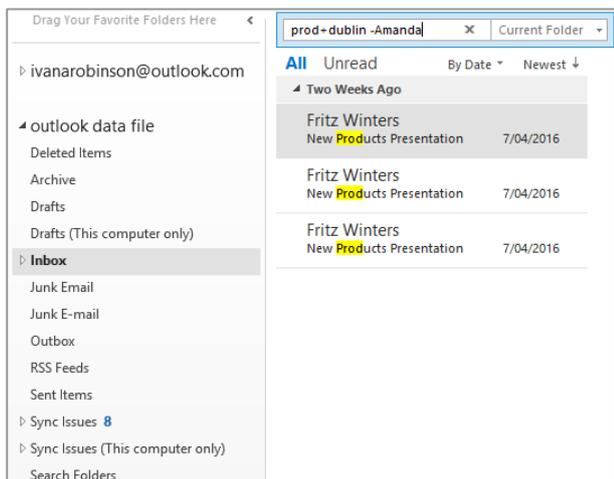
2



5



5



For Your Reference...

To use **Instant Search**:

1. Select the folder you wish to search
2. Type the search criteria in the **Instant Search** box
3. Click on the desired item

Handy to Know...

- Press **Ctrl + E** to access **Instant Search**.
- Attachments are searched but matching phrases aren't highlighted in the results.
- If **Close Search** appears red, Outlook is still performing the search. You can click on it while it is red to stop the search.

EXPANDING THE SEARCH

You can make an Outlook search quite specific using the commands on the ribbon. You can change the scope of the search to check **All Mail Items** or **All Outlook Items** for instance. You can

also specify more advanced criteria such as who the item is **From**, whether it is **Unread**, and so on. By expanding the search you can see how useful and powerful the **Instant Search** feature can be.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 Click in the **Search Inbox** box

The **Search Tools: Search** tab will open. Let's find all messages from Amanda with attachments and 'product' in the Subject...

- 2 Click on **From** in the **Refine** group and type **amanda**

- 3 Click on **Subject** and type **product** (this will find 'product')

The message list will reduce further...

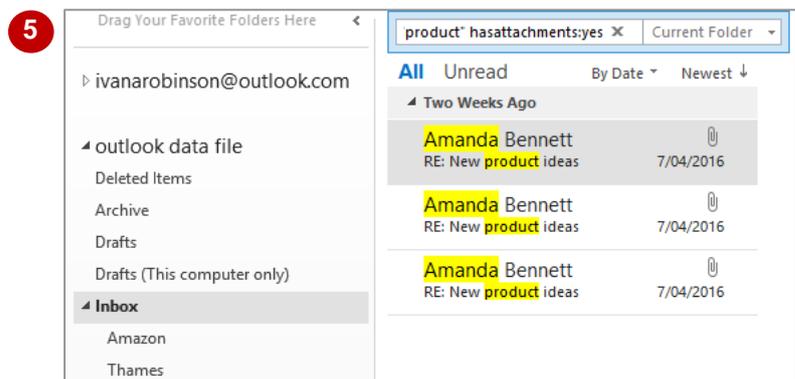
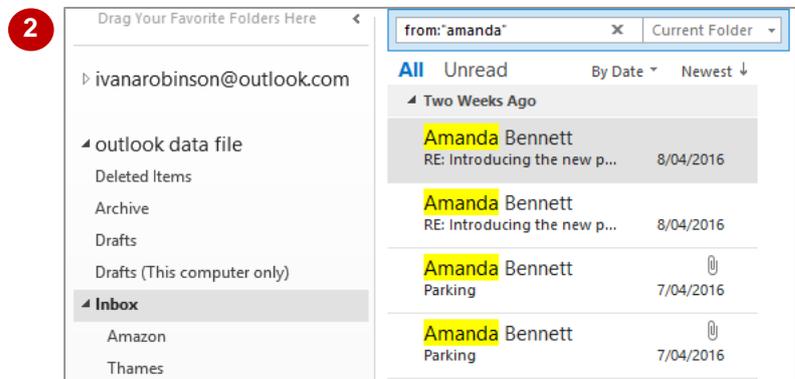
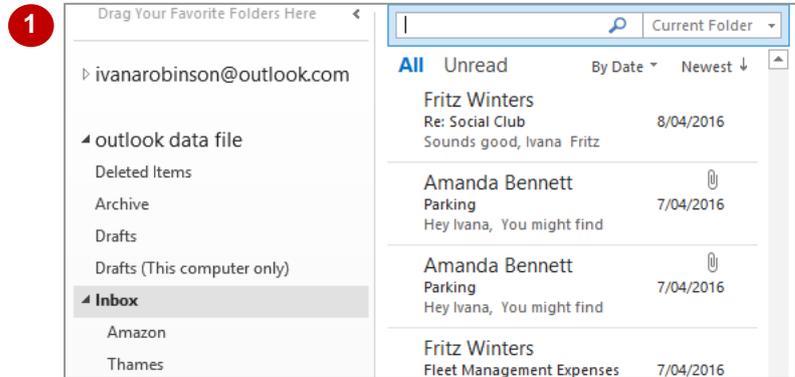
- 4 Click on **Has Attachments**

Let's check for messages conforming to these criteria in all other mail folders now...

- 5 Click on **All Outlook Items** in the **Scope** group

There are three messages conforming to the criteria...

- 6 Click on **Close Search**



For Your Reference...

To **specify more advanced search criteria**:

1. Click in **Instant Search**
2. Click on the desired option in the **Search Tools: Search** tab of the ribbon

Handy to Know...

- If you want to perform a very specific search, you may find it useful to use the **Advanced Find** dialog box. To display this, press **Ctrl + E** to initiate **Instant Search**, then click on **Search Tools** in the **Options** group and select **Advanced Find**.

SEARCH QUERY SYNTAX

As you become familiar with Outlook's search query syntax, you can type your query directly into the **Instant Search** box rather than using the commands on the ribbon. The table below shows

examples of searches you might find useful. Note that you can use logical operators such as AND, NOT, OR, <, >, =, and so on to refine your search, but they must be typed in uppercase.

Use the search query syntax...

To find...

sales

Items containing *sales*, *SALES*, *Sales*, *saLEs* or any other combination of uppercase and lowercase. **Instant Search** is not case sensitive.

sales europe

Items containing both *sales* and *Europe*, including *European*, but not necessarily in that order. You can also type **sales AND europe** to get the same results.

sales NOT europe

Items containing *sales*, but not *Europe*.

sales OR europe

Items containing *sales*, *Europe* or both terms.

"european sales"

Items containing the exact phrase *European sales*. Note the use of double quotation marks (" ") – the search results must match the exact phrase within the quotation marks.

from:"brad"

Items sent from *Brad*.

from:"brad" about:"markets"

Items sent from *Brad* where the term *markets* appears in the subject line, body or attachment contents.

hasattachment:yes

Items that have attachments. You can also type **hasattachments:true** to get the same results.

attachments:budget.xlsx

Items that have the attachment called *budget.xlsx* or if the attachment contains *budget.xlsx* within its contents.

subject:"sales in europe"

Items whose subject line contains the phrase *sales in Europe*.

subject:sales europe

Items with *sales* in the subject line and *Europe* anywhere else in the contents.

cc:"brad harris"

Items that display *Brad Harris* in the Cc line.

cc:brad.harris@watsoniapublishing.com

Items that include the email address *brad.harris@watsoniapublishing.com* in the Cc line.

bcc:brad

Items that include *Brad* in the Bcc line.

SEARCH QUERY SYNTAX – DATES AND SIZE

The table below shows examples of **Instant Searches** that you can perform to find messages based on their size or the date when they were sent or received. You can also use the **More**

Choices tab of the **Advanced Find** dialog box to find messages based on their size. To open this dialog box, click on **Search Tools** and select **Advanced Find**.

Use the search query syntax...

messagesize:<20 KB

messagesize:>4 MB

messagesize:tiny

messagesize:small

messagesize:medium

messagesize:large

messagesize:verylarge

received:=1/1/2010

received:yesterday

received:>=10/1/10 AND received:<=10/5/10

received:>10/1/10 AND received:<10/5/10

from:brad (received:1/7/10 OR received:1/8/10)

sent:yesterday

due:last week

To find...

Items that are less than 20 kilobytes. Note the use of the 'less than' comparison operator (<).

Items that are greater than 4 megabytes. Note the use of the 'greater than' comparison operator (>).

Items that are less than 10 kilobytes.

Items that are between 10 and 25 kilobytes.

Items that are between 25 and 100 kilobytes.

Items that are between 100 and 500 kilobytes.

Items that are between 500 kilobytes and 1 megabyte.

Items that arrived on 1/1/2010. Note the use of the 'equals' comparison operator (=).

Items that arrived yesterday. **Instant Search** also recognises the following date values:

Relative dates such as today, tomorrow, yesterday

Multi-word relative dates such as this week, next month, last week, past month, coming year

Days such as Sunday, Monday and so on

Months such as January, February and so on.

Items that arrived between 10/1/10 and 10/5/10.

Items that arrived after 10/1/10 but before 10/5/10.

Items from *Brad* that arrived on either 1/7/10 or 1/8/10. Note the use of parentheses to group the dates.

Items that you sent yesterday.

Items that are flagged for follow up last week.

USING RECENT SEARCHES

If you perform the same few queries in Outlook on a regular basis, you'll love the fact that Outlook remembers the ten most recently-performed searches. This means that you can

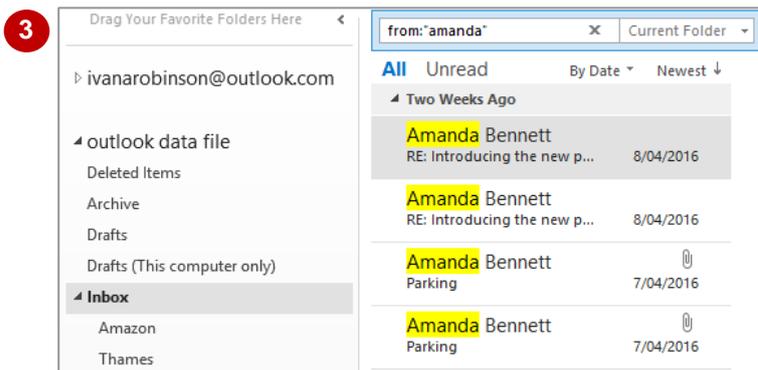
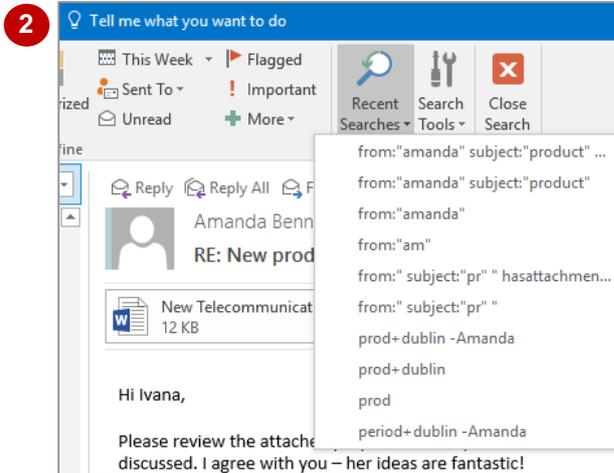
quickly and easily repeat any of these searches again with just a few clicks of the mouse.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 Click in the **Instant Search** box to display the **Search Tools: Search** tab
- 2 Click on **Recent Searches** in the **Options** group to display a list of searches that you've recently performed
Your list may look different to the one shown here...
- 3 Click on one of the searches in the list to re-do the search
- 4 Click on **Close Search** to close **Instant Search**



For Your Reference...

To **perform a recent search**:

1. Click in **Instant Search**
2. Click on **Recent Searches** in the **Options** group
3. Select the desired query

Handy to Know...

- Outlook displays the search query syntax (such as *Europe - sales*) that was used to perform each of the searches that are included on the **Recent Searches** list.

SEARCH OPTIONS

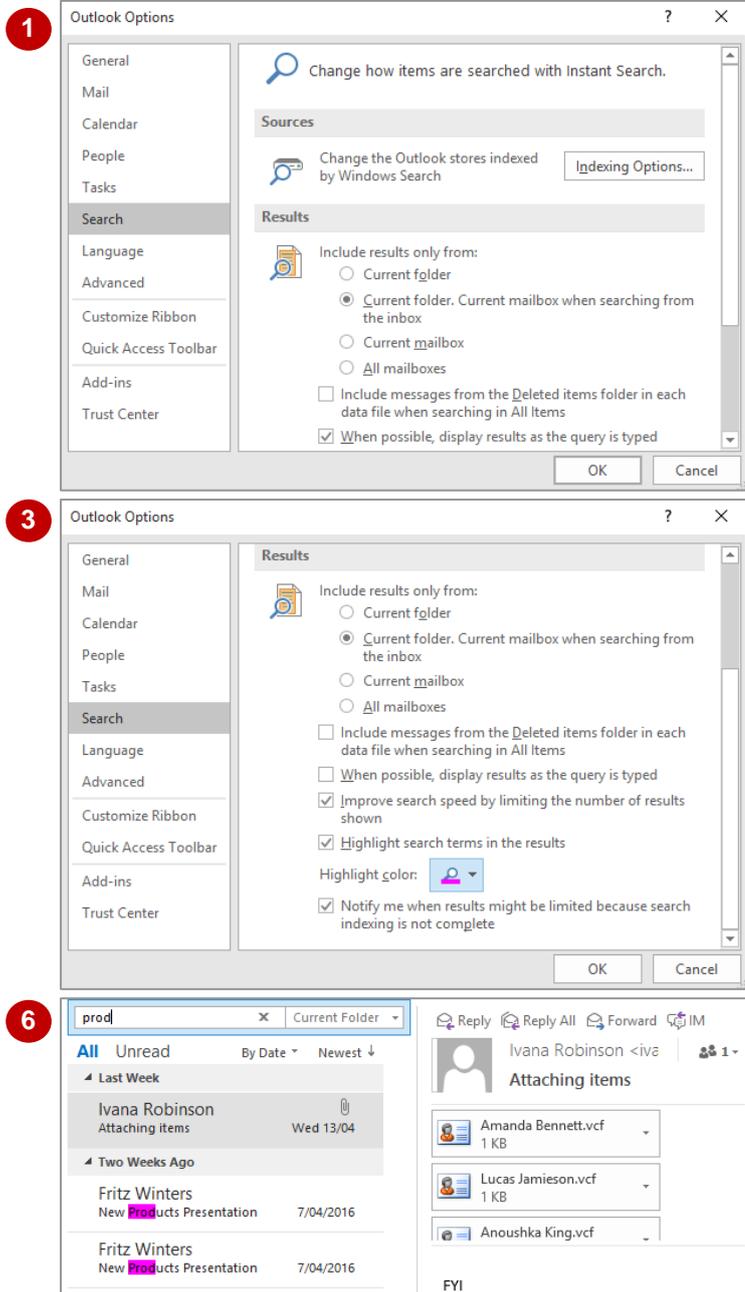
The **Search Options** control how Outlook uses the **Instant Search** feature. For instance, the search results appear automatically by default as you type criteria into the **Instant Search** box.

This is helpful as you can see immediately whether or not you have found the desired information. In this exercise you'll change two settings to see how they work, and then you'll change them back again.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Click in **Instant Search**, click on **Search Tools** in the **Options** group, then select **Search Options** to open the **Search Options** dialog box
- 2 Remove the tick from **When possible, display results as the query is typed** under **Results**
- 3 Scroll down, then click on **Highlight colour** to display a **Colour** box, then click on the pink swatch
- 4 Click on **[OK]** to apply the changes
- 5 Type **prod** in **Instant Search**
Nothing will happen – the search results no longer appear automatically as you type...
- 6 Press **[Enter]** or click on **Search** to activate the search
Product will be highlighted in pink. Let's reset the settings...
- 7 Repeat steps 1 to 4 to tick **When possible...** and change **Highlight colour** to yellow
- 8 Click on **Close Search**



For Your Reference...

To **change** the **search options**:

1. Click in **Instant Search**
2. Click on **Search Tools** in the **Options** group and select **Search Options**
3. Make the desired changes
4. Click on **[OK]**

Handy to Know...

- If you click on **Try searching again in All Mail Items** at the bottom of the search results, the **Deleted Items** folder will not be searched by default. To include this folder, tick **Include messages from the Deleted Items folder in each data file when searching All Items** in the **Search Options**.

SEARCHING OTHER OUTLOOK ITEMS

In addition to using **Instant Search** to find specific mail messages, you can use this feature to search in other Outlook folders such as Calendar, Contacts, Journal, and so on. Although

you use the same method as when you are searching for Mail items, some of the options on the ribbon will change slightly depending on the folder that is currently active.

Try This Yourself:

Continue using the previous file with this exercise...

1 Click on **People** in the **Navigation** bar, then click on **Contacts – Outlook Data File** under **My Contacts**

2 Click in the **Instant Search** box and type **lead**

All contacts who are Leaders will be listed...

3 Click on **Close Search** to clear the search criteria

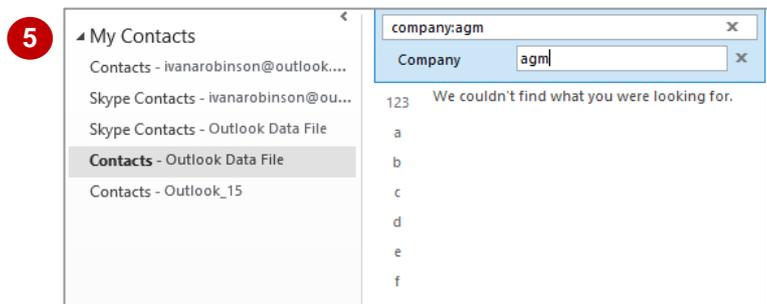
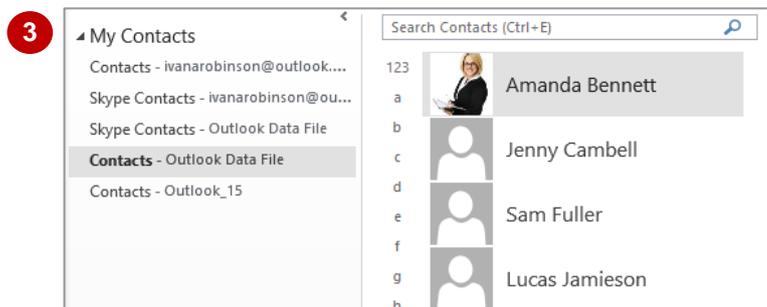
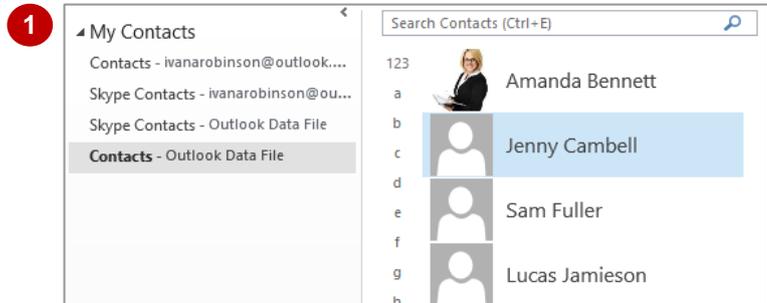
Let's find contacts in a specific company...

4 Press **Ctrl + E**, click on **More** in the **Refine** group and select **Company** to insert a search field

5 In **Company** type **agm**

We don't have a contact from this company...

6 Click on **Remove** to the right of the **Company** field, as shown, then click on **Mail** in the **Navigation** bar



For Your Reference...

To **search** for **other Outlook items**:

1. Open the desired folder by clicking on it in the **Folder** pane
2. Click in the **Instant Search** box
3. Type the search criteria

Handy to Know...

- If a search doesn't find what you're looking for, try widening it by clicking on **Try searching again in All Items** at the bottom of the search results.
- If you don't remove a search field prior to closing a search, it will appear the next time you activate **Instant Search**.

USING A SEARCH FOLDER

Search folders are special folders that group together messages from your mailbox that conform to specific criteria. For example, all unread messages will appear in the **Unread Mail**

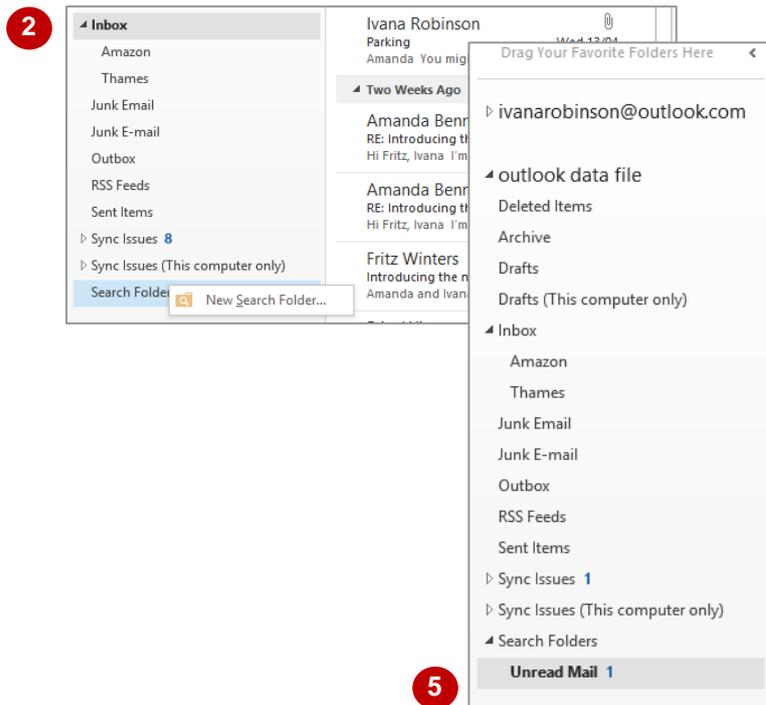
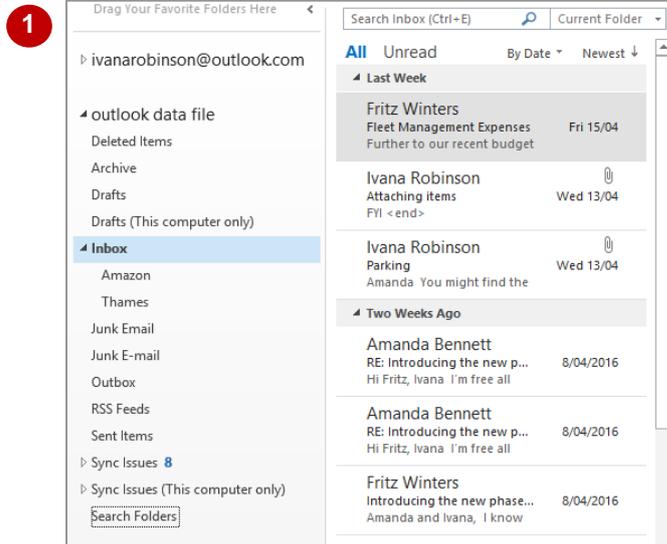
search folder. Search folders are **virtual** folders. This means that they don't store another copy of the messages, they merely **point** to the folder storing the messages such as the **Inbox**.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 Notice the **Search Folders** folder in the **Folders** pane
Currently, this folder is empty...
- 2 Click on **Search Folders**
- 3 Select **New Search Folder** to display the **New Search Folder** dialog box
- 4 Ensure that **Unread mail** is selected under **reading Mail**, then click on [OK]
- 5 Click on each item in the **Unread Mail** folder to mark it as read
Notice that as you "read" the emails, the number of items in the **Unread Mail** folder decreases
- 6 Right-click on **Search Folders** and select **New Search Folder**, then repeat the above steps to add **Older Than One Week** and **Larger Than 100k**



For Your Reference...

To use the **Unread Mail** search folder.

1. Expand **Search Folders** in the **Folder** pane
2. Click on **Unread Mail**

Handy to Know...

- Although messages can appear in different search folders, they are stored only once in the mailbox.

CUSTOMISING PREDEFINED SEARCH FOLDERS

You can change the criteria that will be used by most predefined search folders. In this exercise you will customise the **Old mail** folder so that it will only display messages that are more than

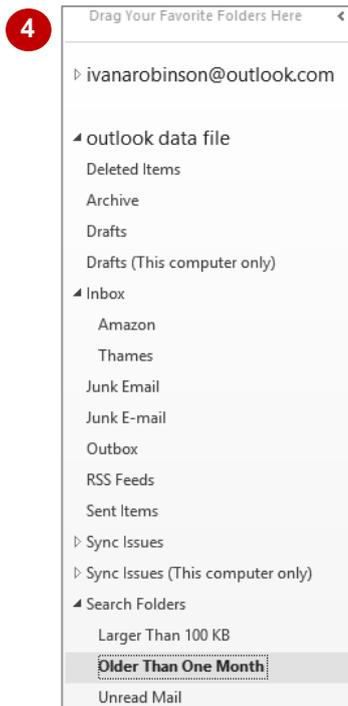
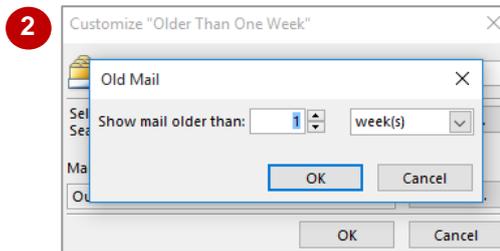
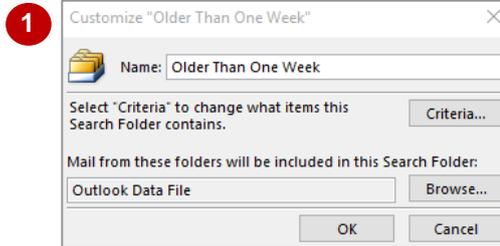
one month old. Note that you cannot change the criteria for the search folders shown under **Reading Mail** in the **New Search Folder** dialog box, such as **Unread Mail** and **Important mail**.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 In the **Folder** pane, right-click on **Older Than One Week** under **Search Folders**, then select **Customise This Search Folder**. The **Customise "Older Than One Week"** dialog box will display.
- 2 Type **Older Than One Month** in **Name**, then click on **[Criteria]** to open the **Old Mail** dialog box.
- 3 Click on the drop arrow for **week(s)** and select **Month(s)**, then click on **[OK]**.
- 4 Click on **[OK]** to close the dialog box and change the search folder.

*All messages that were received more than a month ago will display in the **Older Than One Month** search folder.*



For Your Reference...

To **customise a predefined search folder**:

1. Right-click on the desired folder
2. Select **Customise This Search Folder**
3. Change the **Name** and **Criteria** as desired
4. Click on **[OK]** twice

Handy to Know...

- You can **delete** predefined search folders. To do this, right-click on the folder and select **Delete "folder name"**, then click on **[Yes]** to confirm the deletion. Deleting a search folder only deletes the folder, not the messages that are displayed in it.

CREATING A CUSTOM SEARCH FOLDER

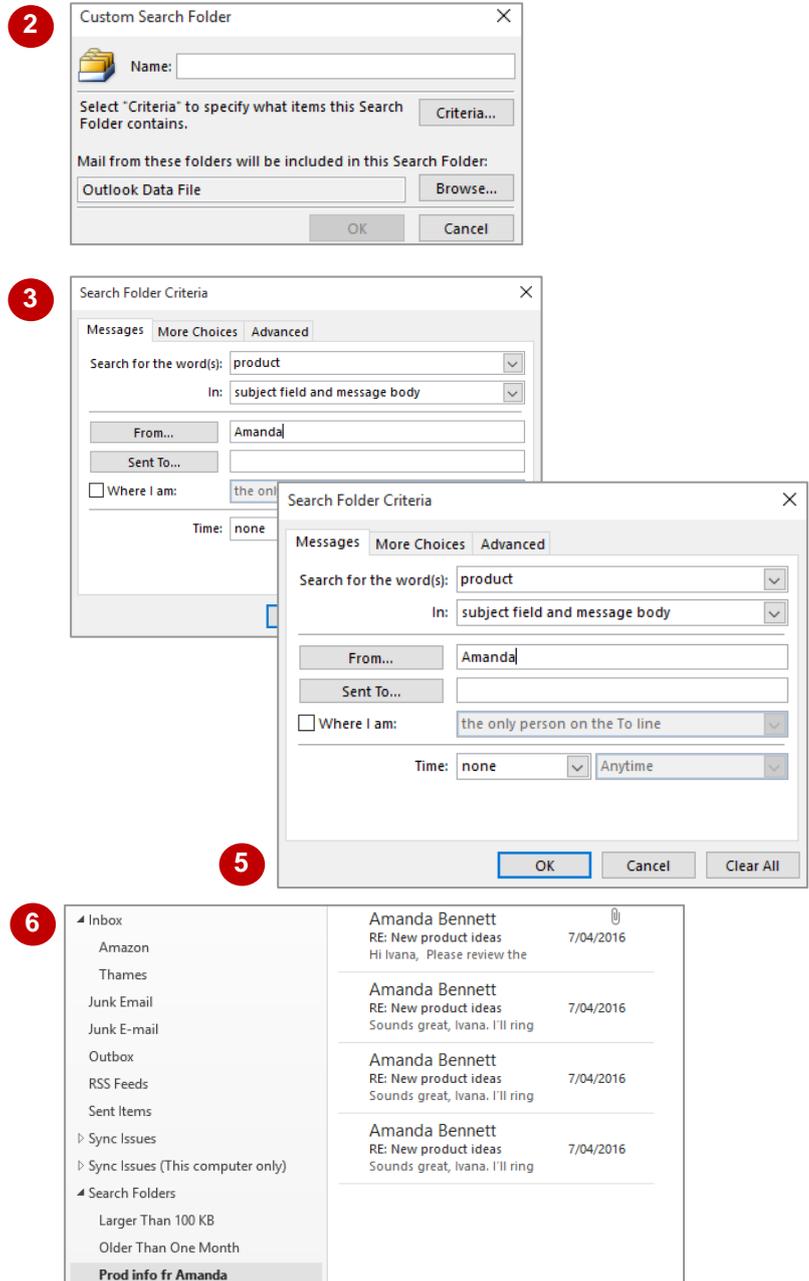
Sometimes, you may find that the predefined search folders don't allow you to group messages as you wish. To overcome this you can create your own custom folders that can be structured

with fairly detailed criteria. For example, you could create a search folder that will display messages from specific people, containing certain words, within a particular time span, and so on.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Click on the **Folder** tab, then click on **New Search Folder** in the **New** group to open the **New Search Folder** dialog box
 - 2 Scroll down to and click on **Create a custom Search Folder** under **Custom**, then click on **[Choose]** to open the **Custom Search Folder** dialog box
 - 3 Type **Prod info fr Amanda** in **Name** and then click on **[Criteria]** to open the **Search Folder Criteria** dialog box
 - 4 Ensure the **Messages** tab is selected, then type **product** in **Search for the word(s)**
 - 5 Click on the drop arrow for **In**, then select **subject field and message body**, then type **Amanda** in **From**
- This search folder will list all messages from Amanda containing 'product' either in the Subject or body of the message...*
- 6 Click on **[OK]** three times to add the custom search folder



For Your Reference...

To create a custom search folder:

1. Click on **New Search Folder** in the **New** group on the **Folder** tab
2. Click on **Create a custom Search Folder**
3. Click on **[Choose]**
4. Type the **Name** and enter the **Criteria**

Handy to Know...

- Search folders support prefix matching in the text strings that you specify in the **Search Folder Criteria** dialog box. For example, if you type **pen** in **Search for the word(s)**, the search folder will display messages with words like 'pendant' or 'pens', but it won't include words like 'open'.

NOTES:



CHAPTER 8 WORKING WITH VIEWS

InFocus

Outlook lets you display items in its various folders using several predefined views or you can create your own custom views. With the help of additional features such as sorting, filtering, being able to add and remove columns from a view, and the like, you can apply a view to ensure that you display only the items you want to see and that they display exactly as you want to see them.

In this session you will:

- ✓ learn how to change the current view
- ✓ learn how to arrange messages within the current view
- ✓ learn how to sort messages within the current view
- ✓ learn how to work with columns in the current view
- ✓ learn how to format columns in the current view
- ✓ learn how to create a custom view
- ✓ learn how to add a filter to a custom view
- ✓ learn how to delete a custom view.

CHANGING THE CURRENT VIEW

Outlook provides a number of ways of organising and displaying messages in folders – these are known as **views**. There are three predefined views which can be accessed via the **View** tab –

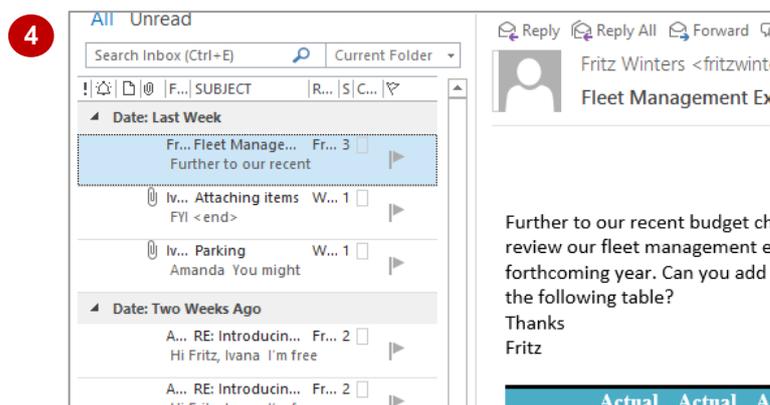
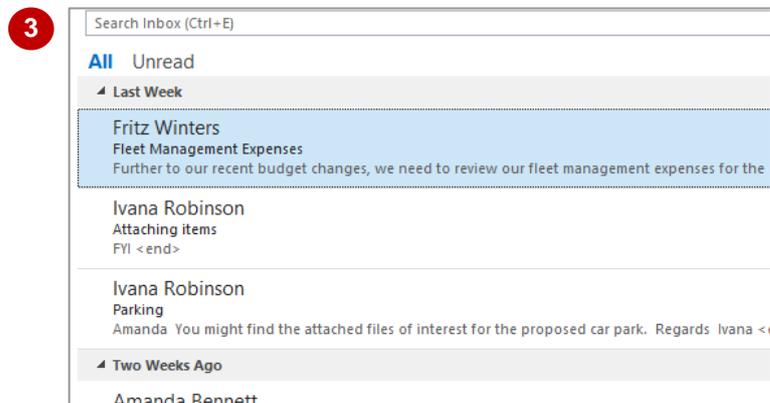
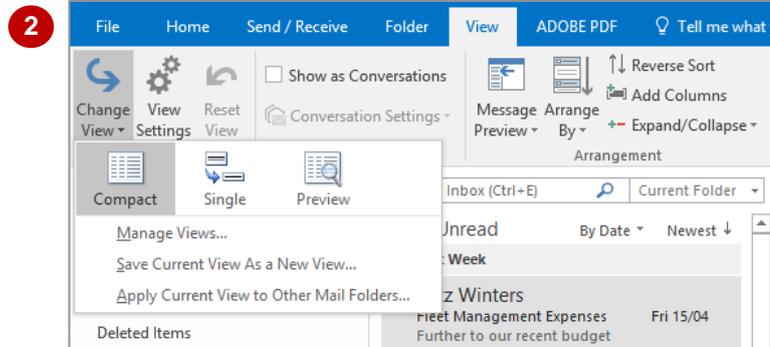
Compact, **Single** and **Preview**. These views let you see your messages listed in a specific layout and with different amounts of content.

Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file *Outlook_16.pst...*

- 1 Click on **Inbox** to see all messages in this folder
- 2 Click on the **View** tab, then click on **Change View** in the **Current View** group to display the **Change View** gallery
- 3 Click on **Preview**
The Reading pane will be closed and a short snippet of each unread message will appear...
- 4 Repeat steps 2 and 3 to change the view to **Single**
Each message will appear in a single line but the Reading pane will remain open. This is the ideal view when you receive many messages a day...
- 5 Repeat steps 2 and 3 to revert to the default **Compact** view
Here the Sender and Subject will appear on separate lines in each message and the Reading pane will be open. The People pane will also be open beneath the Reading pane



For Your Reference...

To **change** the **current message view**.

1. Click on the folder you wish to view
2. Click on the **View** tab, then click on **Change View** in the **Current View** group
3. Select the desired view

Handy to Know...

- You can change the settings used by the default views. To do this, click on **Change View** and select **Manage Views**. Click on the **View** tab and click on **[Modify]**. You can revert to the default settings for a predefined view by changing the view to the desired view and clicking on **Reset View**.

ARRANGING MESSAGES WITHIN A VIEW

You can use the tools in the **Arrangement** group to organise your Mail folders. An arrangement is a predefined grouping and sorting order for the current view. For example, you can arrange your

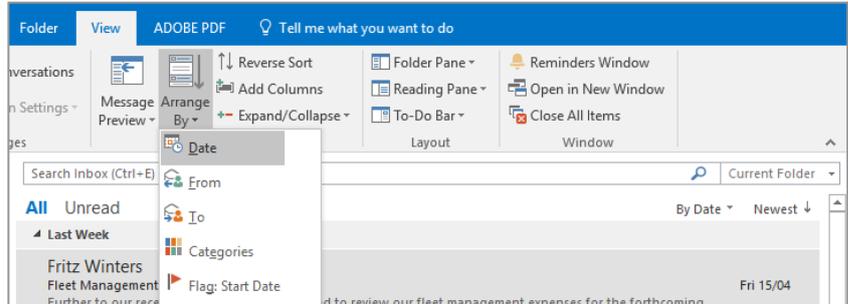
messages grouped by who you've received them from, subject, importance and more. You can also arrange them by conversations although this option is found in its own group on the **View** tab.

Try This Yourself:

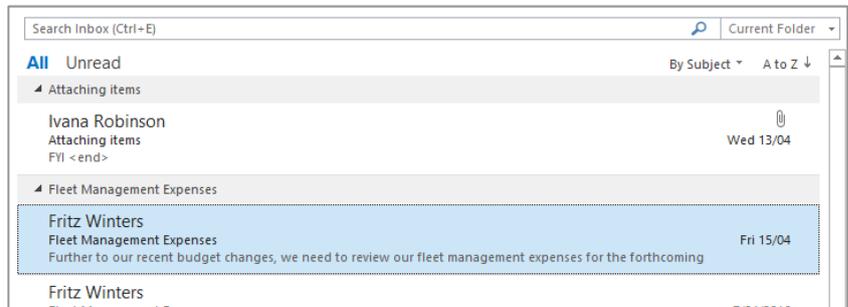
Same File

Continue using the previous file with this exercise...

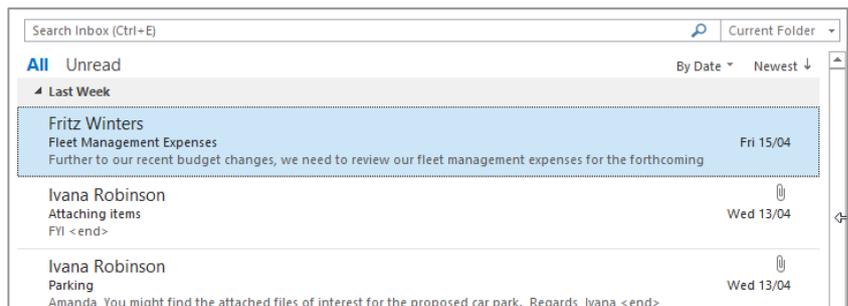
- 1 Ensure the **Compact** view is applied to the Inbox, then on the **View** tab, click on **Reading Pane** in the **Layout** group and select **Off** to close the **Reading** pane if it is open
- 2 On the **View** tab click on the **More** arrow for **Arrange By** in the **Arrangement** group to display a gallery of predefined view arrangements
Currently, the messages are arranged by Date...
- 3 Click on **Subject**
Notice how the messages are arranged and grouped alphabetically (A – Z) by Subject...
- 4 Repeat steps 2 and 3 to try out some of the other arrangements
- 5 Click on **Date** in **Arrange By** to revert to the default arrangement again



2



3



5

For Your Reference...

To **change** the **arrangement** of the **current view**:

1. Click on the folder you wish to view
2. Click on the **View** tab
3. Click on the desired view in the **Arrangement** group

Handy to Know...

- To arrange the view into groups, make sure **Show in Groups** is ticked in **Arrangement**.
- You can group messages by **conversations** (all messages with the same Subject even if they're stored in different mail folders) by ticking **Show as Conversations** in the **Messages** group on the **View** tab.

SORTING MESSAGES WITHIN A VIEW

You can sort the messages within a view using several methods. After selecting the desired **Arrangement** option, you can click on **Reverse Order** in the **Arrangement** group as necessary.

You can also click on a column heading in the view to sort the messages by that column – when you click on the same column heading again you will reverse the sort order.

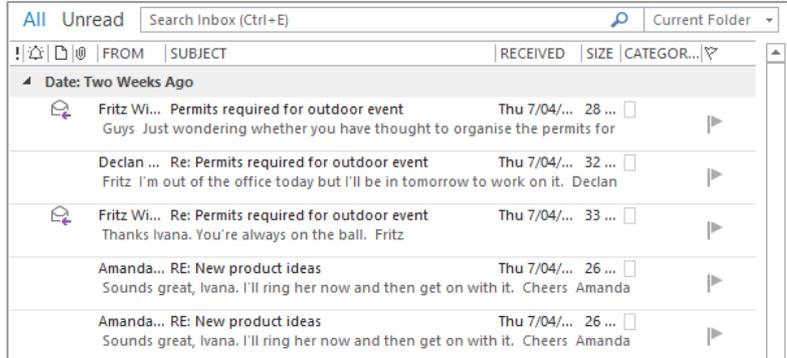
Try This Yourself:

Continue using the previous file with this exercise.

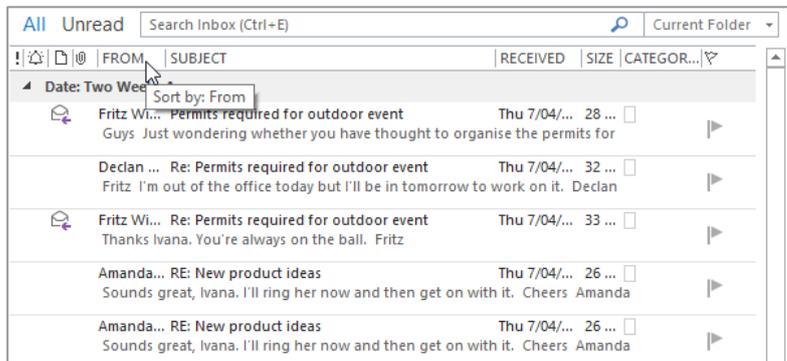
Currently, the list is sorted by date with the newest message at the top...

- 1 Ensure **Single** view is active, then on the **View** tab, click on **Reverse Sort** in the **Arrangement** group to sort the messages with the oldest message at the top
- 2 Point to the **From** column heading
The tooltip Sort by: From will appear...
- 3 Click on the **From** heading to sort the messages by **From** in an ascending order – that is, from **A to Z**
- 4 Click on the **From** heading again – this time the messages will be sorted in a descending order
- 5 Use either method to sort the messages as desired
- 6 Click on **Arrange By** in the **Arrangement** group and select **Date** revert to the default arrangement again

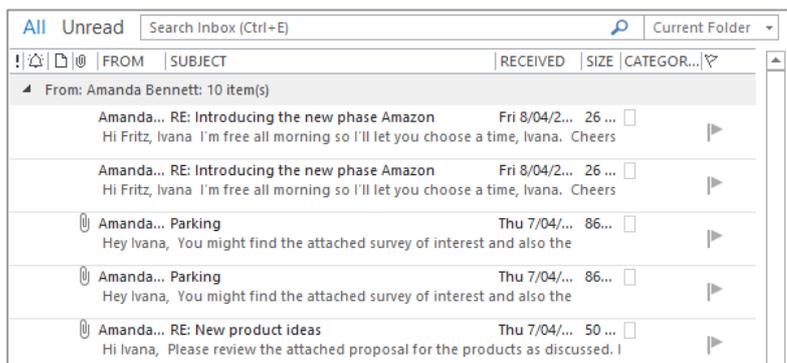
Alternatively, you could have clicked on the **Received** heading to sort the list in descending order



1



2



3

For Your Reference...

To **sort messages** in a **view**:

1. Click on a column heading, then click on the same heading again to reverse the order, or On the **View tab**, click on the desired option in **Arrangement**
2. Click on **Reverse Sort** as necessary

Handy to Know...

- Text-based columns, such as **From**, will be sorted in an ascending order (**A to Z**) when you first click on their heading. The reverse is true for number-based columns – for example, **Size** will be sorted from largest to smallest and **Received** will be sorted from latest to oldest.

WORKING WITH COLUMNS IN A VIEW

Each predefined view is made up of a number of columns that form a table of information about the messages in the selected folder. The columns comprising the views are not

permanently set. For example, you can change the order in which they appear, you can remove unwanted columns from the view, and you can add additional columns as desired.

Try This Yourself:

Continue using the previous...

1 Drag the **Received** column heading to the left until two red arrows appear to the left of **Subject**, as shown, then release the mouse button to relocate the column

2 Repeat step 1 to drag **Received** to its original position to the left of the **SIZE** column

You can remove columns...

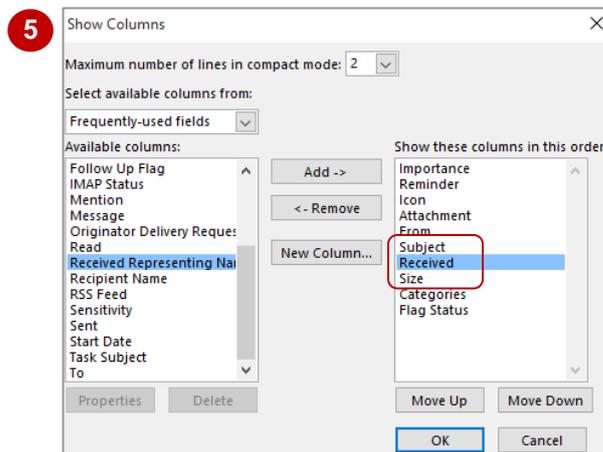
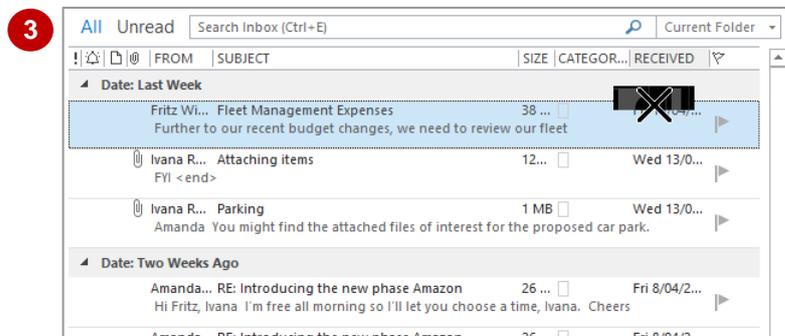
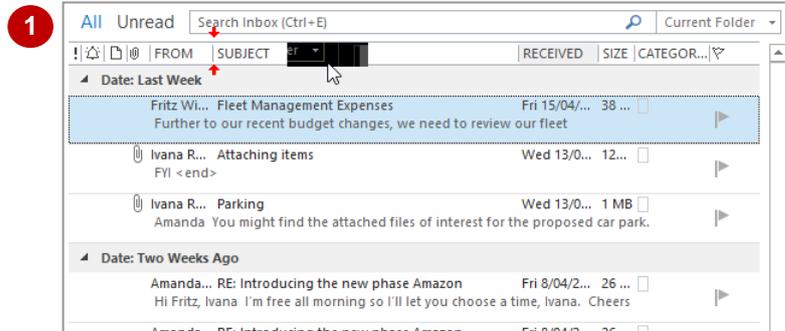
3 Drag **Received** down off the column heading area (a black cross will appear in the heading box, as shown) and then release the mouse button – the column and its data will disappear

Let's add it again...

4 On the **View** tab, click on **Add Columns** in the **Arrangement** group to display the **Show Columns** dialog box

5 Click on **Received** under **Available columns**, click on **[Add]**, then drag **Received** up and drop it between **Subject** and **Size** as shown

6 Click on **[OK]** to add the column



For Your Reference...

To **move columns** in the **current view**:

- Drag the column heading to the desired position

To **remove columns** from the **current view**:

- Drag the column heading down and off the column heading area

Handy to Know...

- You can remove a column from the current message view by right-clicking on the column heading and selecting **Remove This Column**.

FORMATTING COLUMNS IN A VIEW

The Mail folders views are made up of columns of data. You can change the format and width of these columns to suit your needs. For instance, to save screen space you might change the

format that is used to display dates in **Received**, or you might change the width of **From** to **best fit** which alters the column width to neatly fit the largest entry in the column.

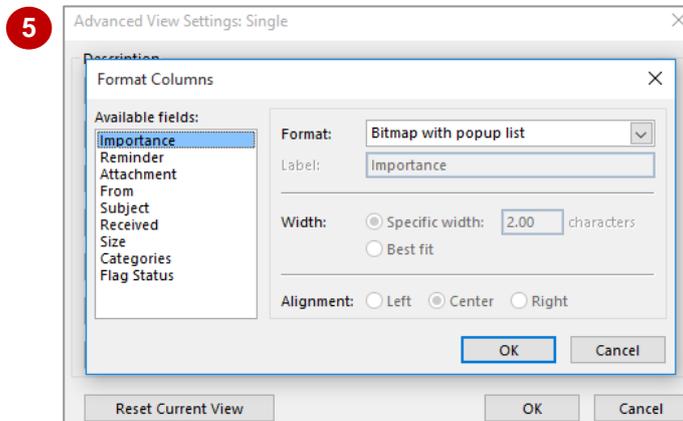
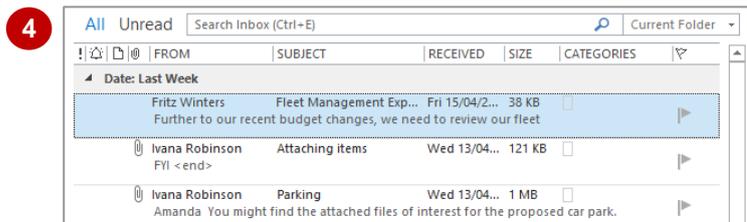
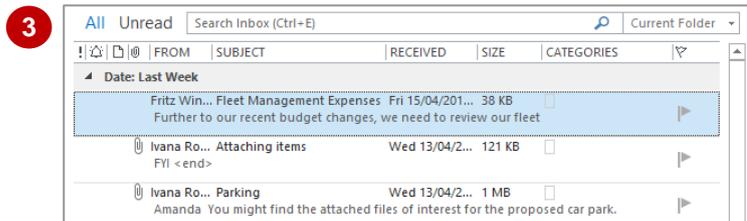
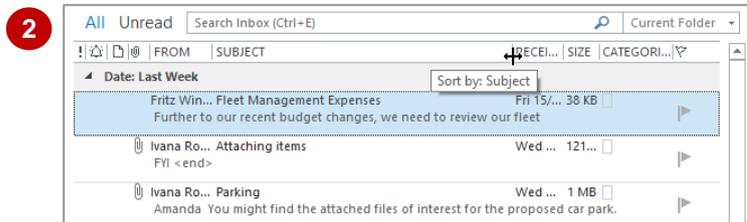
Try This Yourself:

Continue using the previous file with this exercise...

- 1 Ensure that the Outlook window is maximised
- 2 Point to the right-hand vertical column marker for **Subject** until the cursor appears as a double-headed arrow, as shown
- 3 Click on and drag the column marker to the left to reduce the width of the **Subject** column
- 4 Double-click on the right column marker for **From** to change the column to **best fit**

Let's change how the dates appear in Received...

- 5 On the **View** tab, click on **View Settings** in the **Current View** group to open the **Advanced View Settings** dialog box, then click on **[Format Columns]** to open the **Format Columns** dialog box
- 6 Click on the **Received** field, click on the drop arrow for **Format** and select **dd/mm/year**, click on **Best fit** for **Width**, and then click on **[OK]** twice to reformat **Received**



For Your Reference...

To **alter** the **width** of a **column** using the **mouse**:

- Drag the column marker as desired

To **format** a **column**:

1. On the **View** tab, click on **View Settings** in the **Current View** group and click on **[Format Columns]**
2. Click on the field and alter the options

Handy to Know...

- You can alter all features of a specific view from the one location. To do this, click on **Change View** in the **Current View** group and select **Manage Views**. After selecting the view in the **Manage All Views** dialog box, you can then set a filter, alter the fonts, reset the defaults for the view, plus more.

CREATING A CUSTOM VIEW

Outlook provides only three predefined views. However, you can create other custom views. To do this, you can create a new view either from scratch or by basing it on the closest matching

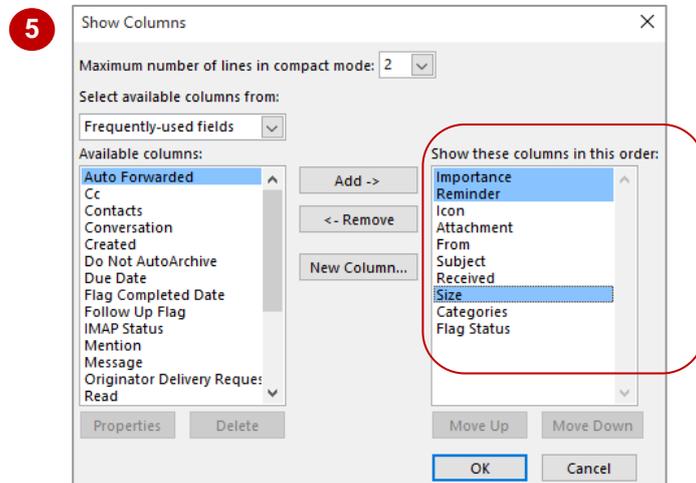
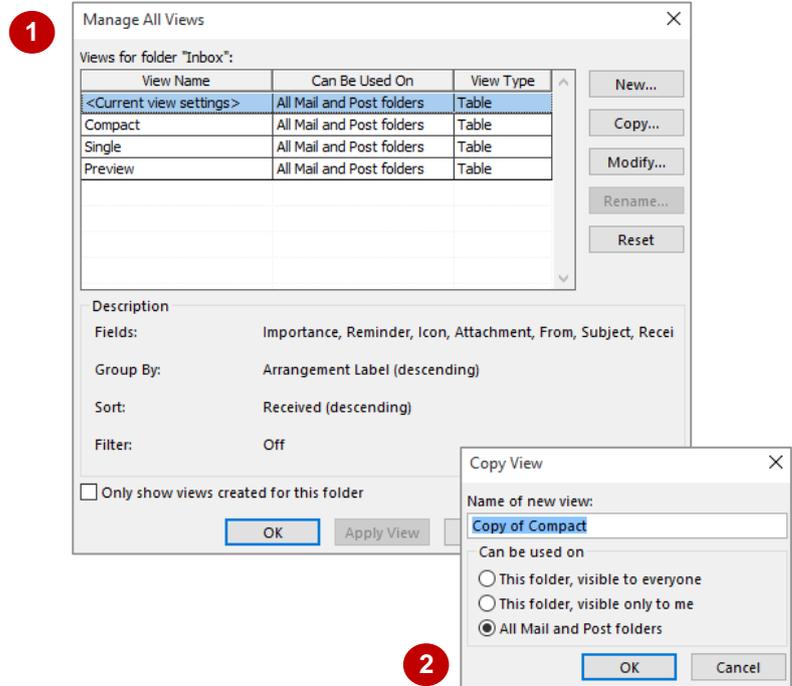
predefined view. Creating a view based on an existing one can save time as you may only need to make a few minor changes to the original settings.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 On the **View** tab, click on **Change View** in the **Current View** group and select **Manage Views** to open the **Manage All Views** dialog box
- 2 Click on **Compact** under **View Name**, then click on **[Copy]** to open the **Copy View** dialog box
- 3 Type **Amazon** in **Name of new view**, click on **This folder, visible only to me** and then click on **[OK]** to open the **Advanced View Settings: Amazon** dialog box
- 4 Click on **[Columns]** to open the **Show Columns** dialog box
- 5 Under **Show these columns in this order**, click on **Importance**, press **[Ctrl]** and click on **Reminder** and **Size** to select these fields
- 6 Click on **[Remove]** – these fields won't appear in the new view
- 7 Click on **[OK]** twice, then click on **[Apply View]** to apply the custom view

At the moment, nothing much will happen until we apply a filter



For Your Reference...

To **create** a **new view from** an **existing view**.

1. Select **Change View > Manage Views**
2. Select the view and then click on **[Copy]**
3. Name the view and then click on **[OK]**
4. Customise the view as desired
5. Click on **[OK]** twice then on **[Apply View]**

Handy to Know...

- You cannot rename a predefined view, even if you have customised it. Instead, copy the predefined view, give the copied view a new name, and then change the settings.
- New views are listed in the **Change View** gallery.

ADDING A FILTER TO A CUSTOM VIEW

Filtering is different to sorting. When you sort items, you rearrange the items that currently appear in the view. When you filter items, you selectively choose which items will appear in the

view. Applying a filter to a view lets you see only the information you require. You can specify a filter when you create or modify a custom view, or you can add a filter to a predefined view.

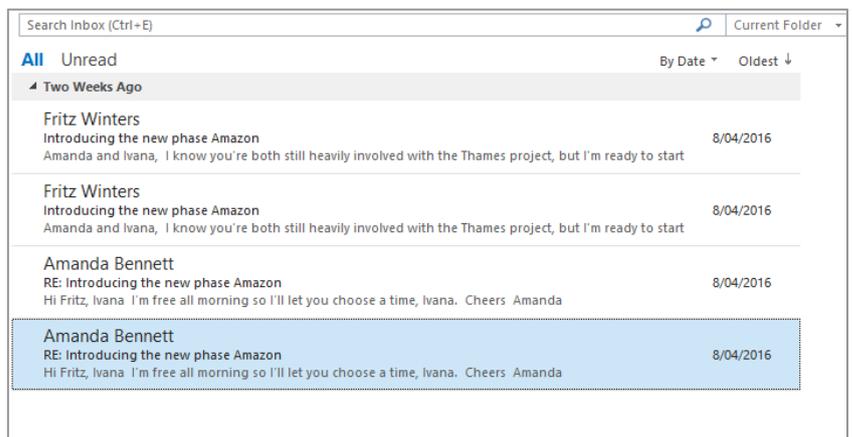
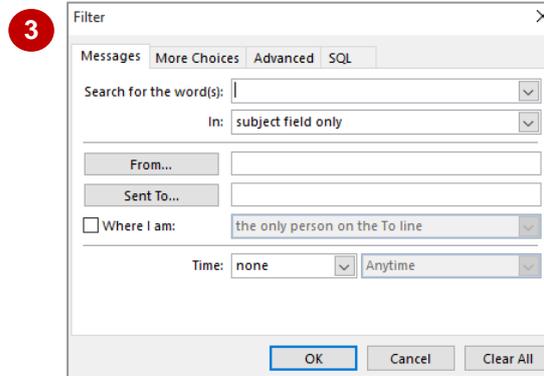
Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 On the **View** tab, click on **Change View** in the **Current View** group and select **Manage Views** to open the **Manage All Views** dialog box
- 2 Click on **Amazon** under **View Name**, then click on **[Modify]** to open the **Advanced View Settings: Amazon** dialog box
- 3 Click on **[Filter]** to open the **Filter** dialog box, then ensure the **Messages** tab is selected
- 4 Type **amazon** in **Search for the word(s)** and select **subject field and message body** in **In**
- 5 Click on **[OK]** twice, then click on **[Apply View]** to apply the **Amazon** view filter

Now only messages with Amazon in the Subject or message appear in the custom view



5

For Your Reference...

To **add** a **filter** to a **custom view**:

1. Select **Change View > Manage Views**
2. Select the view and then click on **[Modify]**
3. Click on **[Filter]**
4. Specify the desired filter criteria
5. Click on **[OK]** twice then on **[Apply View]**

Handy to Know...

- When a View filter is applied to a selected folder, the words **Filter Applied** will appear to the left of the status bar.

DELETING A CUSTOM VIEW

When you create a custom view it is automatically added to the **Change View** gallery along with the three predefined views. If you create custom views regularly, you should

consider deleting unwanted views to ensure that the **Change View** gallery doesn't become cluttered with unnecessary views.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 On the **View** tab, click on **Change View** in the **Current View** group to display the **Change View** gallery

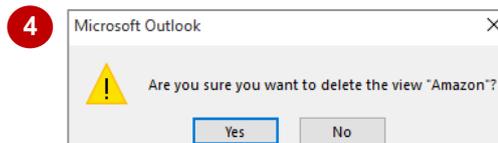
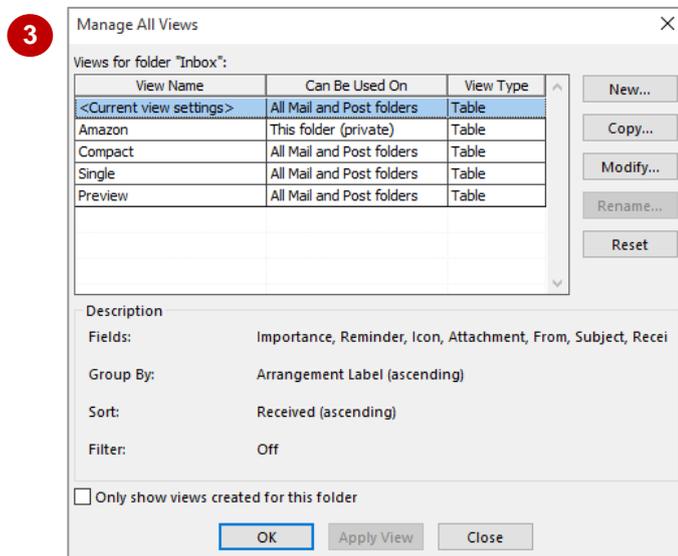
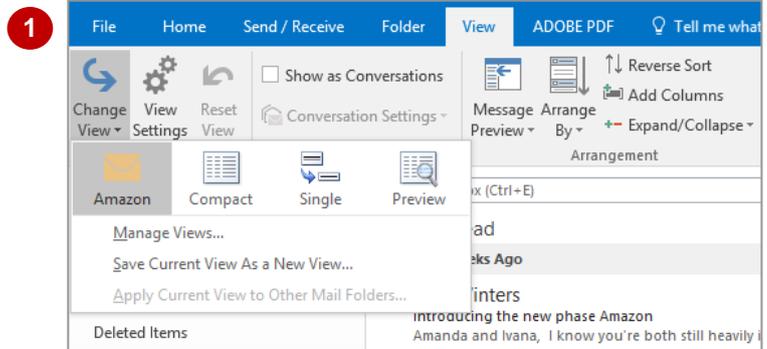
Notice that the *Amazon* custom view is currently applied to the *Inbox*.

Let's apply the default view so that you can delete the custom view...

- 2 Click on **Compact** to apply the default view to the *Inbox*
- 3 Click on **Change View** and select **Manage Views** to open the **Manage All Views** dialog box
- 4 Click on **Amazon** under **View Name** and then click on **[Delete]**

A message will appear asking you to confirm your intentions...

- 5 Click on **[Yes]** to delete the custom view, then click on **[Close]** to return to the *Inbox*



For Your Reference...

To **delete** a **custom view**:

1. Select **Change View > Manage Views**
2. Click on the desired custom view
3. Click on **[Delete]**
4. Click on **[Yes]** and then on **[Close]**

Handy to Know...

- If you accidentally delete a custom view, you cannot undo the deletion. Instead, you will have to rebuild the view again.

NOTES:



CHAPTER 9

FLAGGING MESSAGES**InFocus**

You can **flag** messages, either those listed in your Mail folders or new messages that you are creating and sending to others. By flagging a message, you are providing a subtle visual reminder that either you or the recipient must follow up or action a message in some way.

You can also optionally choose to have Outlook both visually and aurally remind you or someone else to action a message by adding a **reminder**. Reminders are message boxes which pop up and demand a response.

In this session you will:

- ✓ gain an understanding of flags and reminders
- ✓ learn how to flag messages in the message list
- ✓ learn how to send a message with a flag
- ✓ learn how to add a reminder to your messages
- ✓ learn how to change the default quick click flag
- ✓ learn how to remove a flag from a message.

ABOUT FLAGS AND REMINDERS

Applying a **flag** to a message, task or contact provides a *visual* reminder to follow up on an item in some way. For example, you could flag a message to remind you to reply after talking with

your team. If you want Outlook to prompt you to take action on a flagged item by a certain time – both *visually* with a dialog box and *aurally* with an alarm – you can add a **reminder** to the item.

Follow Up Flags

When you add a flag to a message, the message will appear with a coloured **flag** icon in your message list. The flag icon will be red or a shade of pink depending on the flag date that you choose – for example, a **Daily** flag will appear with a red flag icon.

The flagged message will also appear in the **Task List** in Tasks and in the **Tasks** peek on the **Navigation bar**, along with other flagged items (such as contacts) and any tasks you've created. If you dock the **Tasks** peek, the flagged items will also appear in the **To-Do bar**.

As well as flagging messages for yourself, you can flag messages for other people. In this case, a flagged message will appear only in the recipient's message list with a flag icon. This message will not appear in their **Task List**, **Tasks** peek and **To-Do bar**. However, they can add the flagged message to their **To-Do bar**, if desired, simply by clicking on the flag icon in the **Flag Status** column.

How Flag Dates Work

Outlook provides several default flags with dates, such as **Today**, **This Week**, **Next Week** and so on. As well as the default dates, you can also specify your own custom dates for a flag or you can choose a flag without a date. The flag options are listed in the **Follow Up** gallery on the **Home** tab.

When you flag a message, Outlook inserts the follow up information in the InfoBar in the message header. This includes information such as the flag text, Start By, Due By, Recipients received information, and so on. The following table describes how Outlook calculates the Start By and Due By dates. It also shows when Outlook will issue a **reminder** if you choose to add a reminder to the flagged item using the default settings.

Flag	Start By	Due By	Reminder
<i>Today</i>	Current date	Current date	One hour before the end time of today's work day
<i>Tomorrow</i>	Current date plus one day	Current date plus one day	Start time of current day plus one work day
<i>This Week</i>	Current date plus two days, but no later than the last work day of this week	Last work day of this week	Start time of current day plus two work days
<i>Next Week</i>	First work day of next week	Last work day of next week	Start time of the first work day of next week
<i>No Date</i>	No date	No date	Current date
<i>Custom</i>	Current date is displayed – choose a custom date if desired	Current date is displayed – choose a custom date if desired	Current date is displayed – choose a custom date if desired

How Reminders Work

At the allotted **Reminder** time – the default times are shown in the table above – Outlook will emit a small bell sound and display the **Reminder** dialog box. The flagged item (plus other items which have had reminders issued) will be listed in the dialog box, showing the **Subject** and **Due in** time. From this dialog box you can **[Dismiss]** the item (or all items), **[Open]** the item or click on **[Snooze]** to get Outlook to remind you again after a specified period of time.

FLAGGING MESSAGES IN THE MESSAGE LIST

You can flag a message to provide yourself with a visual reminder that the message needs some form of attention, such as reviewing an attached document. When you add a flag to a message,

the message will appear in the message list with a coloured flag icon. The flagged message will also appear in the **Tasks** peek (and the **To-Do bar** if you dock the peek) and the **Task list** in Tasks.

Try This Yourself:

Open File Before starting this exercise you **MUST** open the data file Outlook_03.pst...

1 Click on the **Inbox** and then point to the **Parking** message from **Ivana Robinson** to highlight it and to display the Quick Click icons to the right of the message

Currently, the flag icon in the message list is grey (or not selected)...

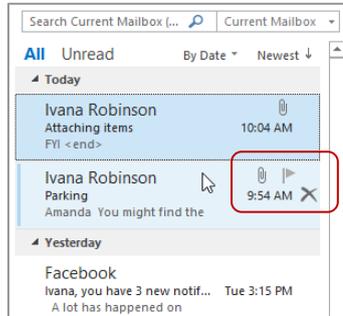
2 Click on the Quick Click **flag** icon in the message list to flag the message

By default, the Quick Click flag is set to Today (as you can tell by the red flag). But you can select a different timeframe...

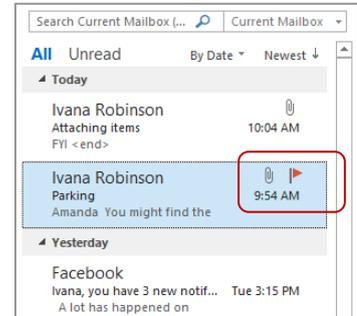
3 On the **Home** tab, click on **Follow Up** in the **Tags** group to display the list of available options

4 Select **Tomorrow**
The flag icon will change from red to pink...

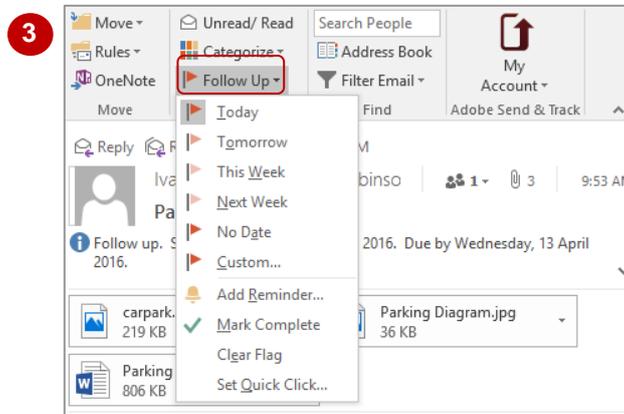
5 Look at the top of the message in the **Reading** pane
The **Follow up** information (Start by and Due by dates) appears at the top of the message



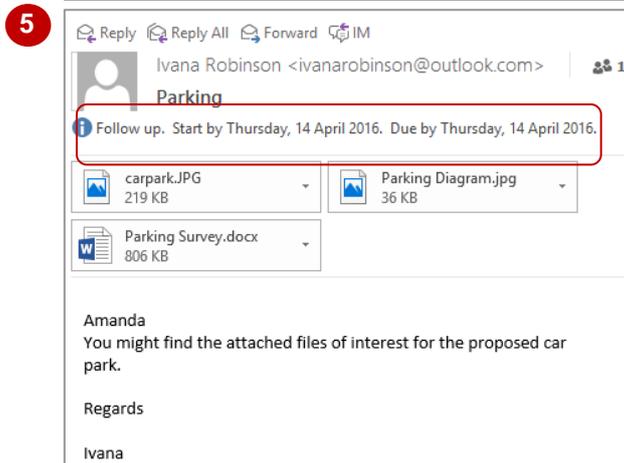
1



2



3



5

Tip: You can right-click on the Quick Click flag icon in the message list to display the shortcut menu of available flag options.

For Your Reference...

To **flag** a **message** in the **message list**.

1. Click on the message in the message list
2. Click on the **Home** tab, then click on **Follow Up** in the **Tags** group
3. Select the desired option

Handy to Know...

- You can add a flag with a custom date to a message. To do this, click on Follow Up and select Custom. Select Flag to or type your own text if desired, and select the Start and Due dates. You can also set a reminder if required by ticking Reminder and setting the date and time.

SENDING A MESSAGE WITH A FLAG

If you want to ensure that the recipient of your message replies to it or performs some other action, you can send them a flagged message. The message will appear in their Inbox with a flag

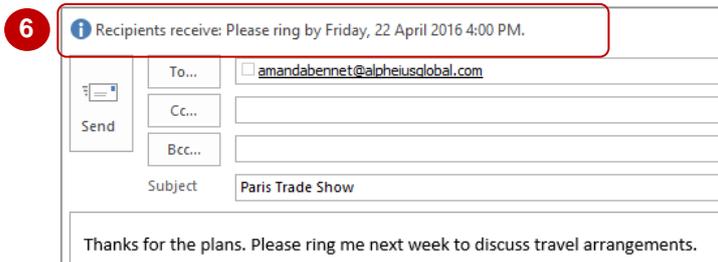
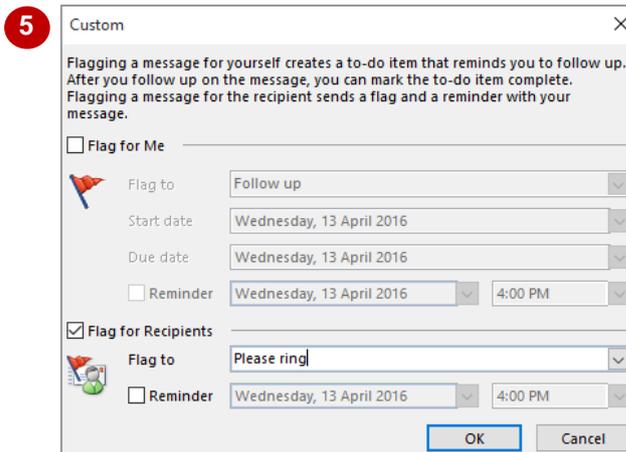
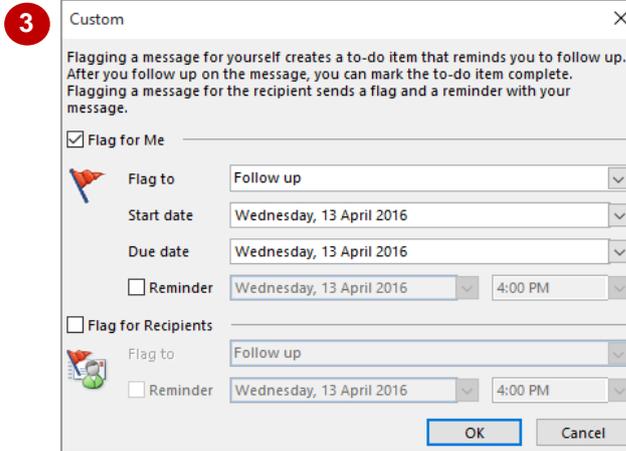
icon and the follow up details will appear at the top of the message. You can change the default follow up text from Follow up to something more pertinent to your requirements.

Try This Yourself:

Same File

Continue using the previous data file with this exercise...

- 1 Create a new message addressing it to one of your colleagues
- 2 Type **Paris Trade Show** in **Subject** and type **Thanks for the plans. Please ring me next week to discuss travel arrangements.** in the message body
- 3 On the **Message** tab, click on **Follow Up** in the **Tags** group and select **Custom** to open the **Custom** dialog box
- 4 Click on **Flag for Me** to remove the tick, then click on **Flag for Recipients**
- 5 Select **Follow up** in **Flag to**, then type **Please ring**
- 6 Click on **Reminder** to tick it, change the **Reminder** date to Friday of next week, and then click on **[OK]**
Outlook will display the custom text plus the reminder information at the top of the message...
- 7 Send the message



For Your Reference...

To **send a flagged message**:

1. Create a new message
2. On the **Message** tab, click on **Follow Up** in the **Tags** group
3. Select **Custom**
4. Tick **Flag for Recipients** and set the options

Handy to Know...

- If you want to include a flag in the message for yourself as well as for the recipient, tick **Flag for Me** in the **Custom** dialog box.
- Consider carefully whether or not to include a reminder for the recipient when you send a flagged message. You don't want to annoy them.

ADDING A REMINDER TO YOUR MESSAGES

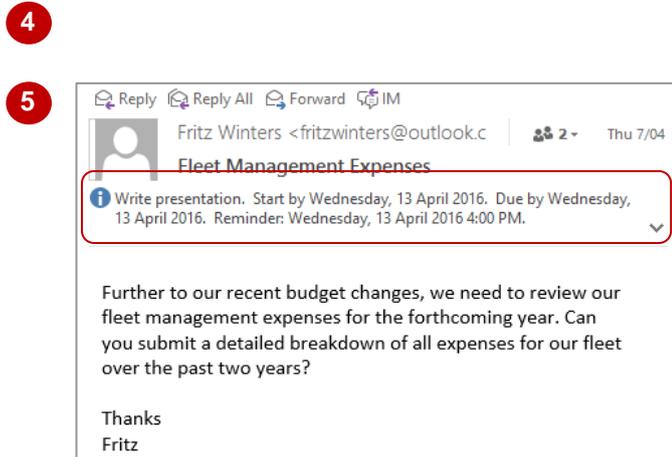
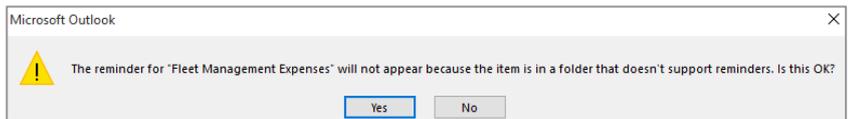
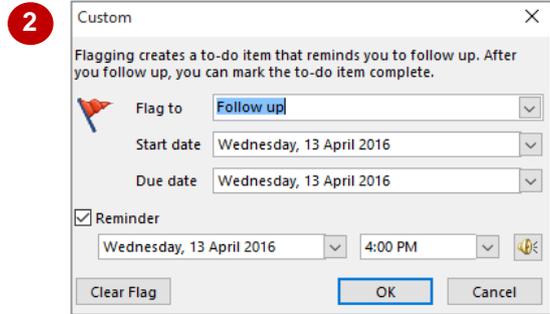
Flagged messages appear with a **flag** icon in the message list. If you have many messages flagged, it might be easy to miss a critical message. To ensure that you don't forget to

action a flagged message, you can add a **reminder** to the flag so that you are prompted to take action. A **bell** icon will appear in the message in the message list showing that a reminder has been set.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Point to the **New Products Presentation** message from **Fritz** to display the Quick Click icons
Let's remind ourselves that we must prepare the presentation by the end of today...
- 2 Right-click on the Quick Click flag and select **Add Reminder** to open the **Custom dialog** box
- 3 Ensure that the text **Follow up** in **Flag to** is selected, then type **Write presentation**
- 4 Ensure that **Reminder** is ticked and that the **Reminder** date and time are set to **4:00 PM** today, then click on **[OK]** to add the reminder
If a message appears telling you the folder doesn't support reminders, click on [Yes]. This may appear in training because you're not using the default data file. Don't worry, it won't appear in real life.
The reminder bell icon and red flag will appear to the right of the message...
- 5 Click on the message and check that the follow up and reminder data appears at the top of the message in the **Reading** pane



For Your Reference...

- To **add** a **reminder** to your **messages**:
1. Click on the message in a message list
 2. On the **Home** tab, click on **Follow Up** in the **Tags** group and select **Add Reminder**
 3. Tick **Reminder** and change the **Reminder** date and time as desired
 4. Click on **[OK]**

Handy to Know...

- At the specified **Reminder** date and time, Outlook will sound the reminder alarm and open the **Reminder** dialog box which lists the items and specifies when the items are due. Once the **Reminder** date and time have passed, the message text will appear red in the message list.

CHANGING THE DEFAULT QUICK CLICK FLAG

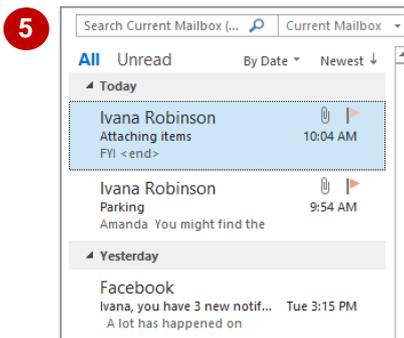
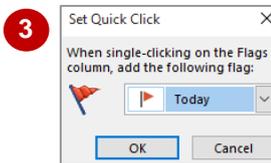
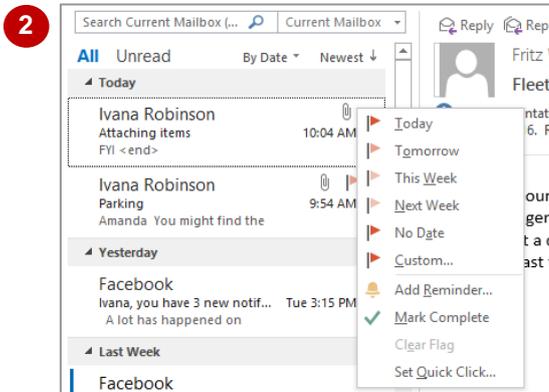
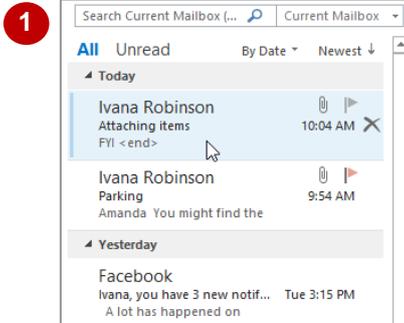
The quickest way to flag messages for follow-up is to use the Quick Click flag in the message list. The Quick Click flag is set to **Today** by default but you can easily change it to a different value if

necessary. For instance, if you regularly flag messages for **This Week**, rather than using the ribbon or shortcut menu to apply this flag option, you can change the Quick Click flag default value.

Try This Yourself:

Continue using the previous data file with this exercise...

- 1 Point to any message in the message list to display the Quick Click flag
- 2 Right-click on the Quick Click flag to display the shortcut menu of options
- 3 Select **Set Quick Click** to display the **Set Quick Click** dialog box
- 4 Click on the drop arrow for **Today**, select **This Week** and click on **[OK]**
- 5 Point to an unflagged message in the message list, then click on the Quick Click flag to flag the message
Notice the flag is a mid-pink colour. Let's change the flag back to the default value...
- 6 Repeat steps 1 to 4 but select **Today** in the **Set Quick Click** dialog box



For Your Reference...

To **change** the **default Quick Click flag**:

1. Point to a message in a message list, then right-click on the Quick Click flag
2. Select **Set Quick Click**
3. Select the desired option and click on **[OK]**

Handy to Know...

- If you often flag messages that need follow-up but there's no deadline, set the Quick Click flag to **No Date**.
- If you change the default Quick Click flag, the flags in previously flagged messages will not change.

REMOVING A FLAG

Once you have actioned a flagged message, you should remove the flag to ensure that you don't clutter up your message lists with flag indicators. This will also ensure that outstanding flagged

items stand out clearly. To remove a flag, you can either clear the flag or mark the item as being completed (which changes the flag to a tick icon).

Try This Yourself:

Continue using the previous data file with this exercise...

- 1 Click on the flagged **Parking** message from **Ivana Robinson** to select it

We've followed up on this message but we want an indicator to show that it's been actioned, so let's mark it as complete...

- 2 Click on the Quick Click flag icon for the **Parking** message, then click on another message in the message list

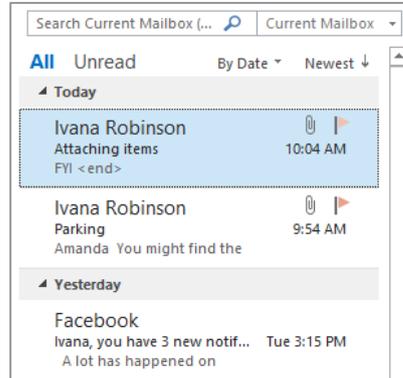
A green tick icon will replace the red flag indicating that the task has been completed.

Let's clear a flag this time – perhaps we flagged the wrong message or don't need to retain a record of following up this message...

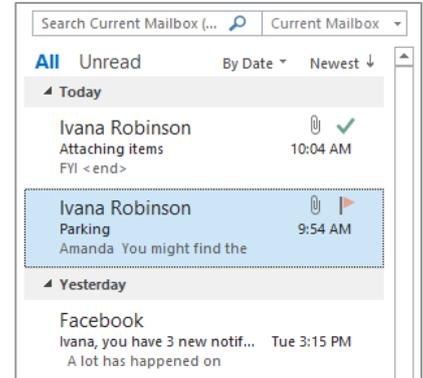
- 3 Click on the flagged **Fleet Management Expenses** message from **Fritz** to select it

- 4 On the **Home** tab, click on **Follow Up** in the **Tags** group and select **Clear Flag**

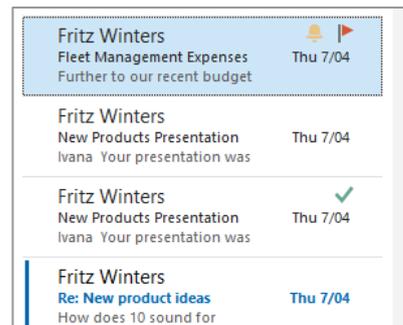
The red flag and the reminder bell icon will both disappear



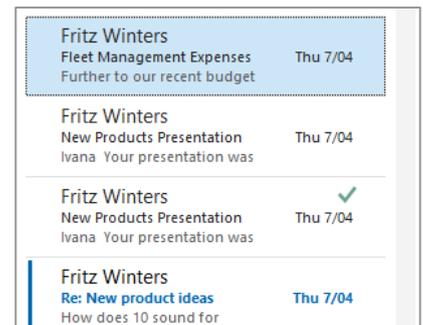
1



2



3



4

For Your Reference...

To **remove** a **flag**:

1. Click on the message in a message list
2. Click on the **Home** tab, then click on **Follow Up** in the **Tags** group
3. Select **Clear Flag**, or Select **Mark Complete**

Handy to Know...

- **Clearing** a flag or marking a flag as **complete** will remove this item from the **Tasks** peek.
- To view all completed items, go to **Tasks**, click on the **Home** tab, click on **Change View** in the **Current View** group and click on **Completed**.

NOTES:



CHAPTER 10 COLOUR CATEGORIES

InFocus

Colour categories help you to easily identify and group associated items within Microsoft Outlook. You can assign a colour category to a group of interrelated items – such as messages, contacts, notes, appointments, and so on – so that you can quickly and easily access or organise them. Outlook items can have more than one colour category assigned to them as some items may need to be grouped in a number of different categories.

In this session you will:

- ✓ learn how to create a new colour category
- ✓ learn how to assign a colour category to a message
- ✓ learn how to find messages that have been assigned a colour category
- ✓ learn how to remove categories from messages
- ✓ learn how to delete a colour category.

CREATING A NEW COLOUR CATEGORY

You can use **colour categories** to quickly and easily identify and group together related Outlook items, such as email messages, contacts, tasks and appointments. The category colours appear

prominently in views such as your Inbox, as well as within the open items themselves. In addition to the default colour categories provided by Outlook, you can create new categories as desired.

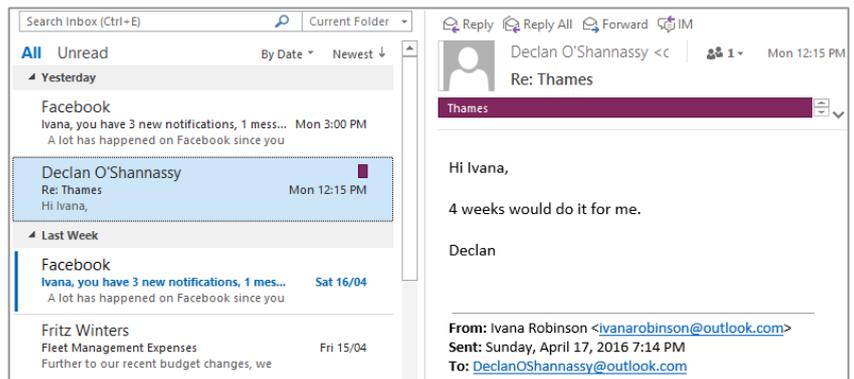
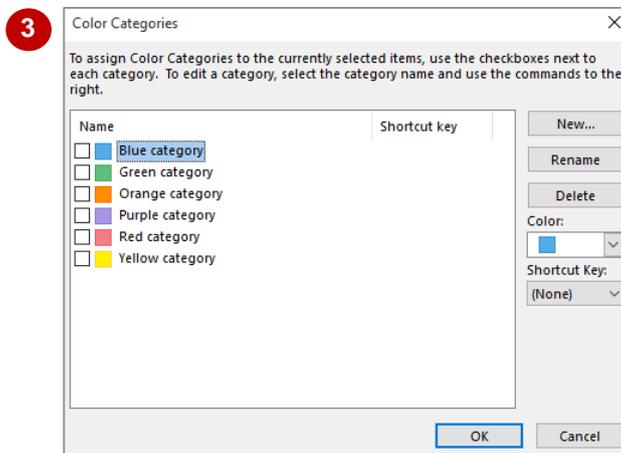
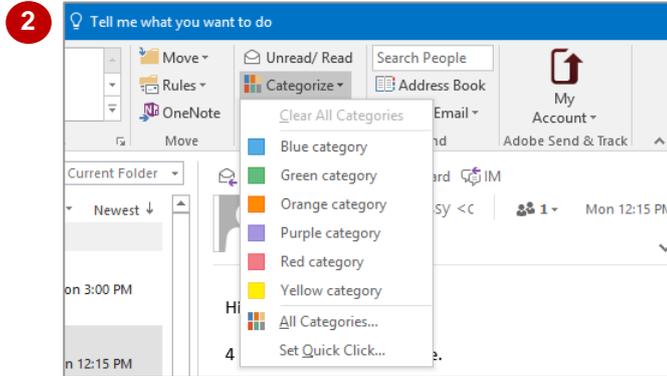
Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file *Outlook_17.pst...*

- 1 Ensure the **Home** tab is active then expand the **outlook data file** in the **Folders** pane and click on **Inbox**
- 2 In the message list, click on the **Declan** message with the **RE: Thames** subject, then click on **Categorise** in the **Tags** group to open the **Categorise** gallery
- 3 Select **All Categories** to open the **Colour Categories** dialog box
- 4 Click on **[New]** to open the **Add New Category** dialog box
- 5 Type **Thames** in **Name**, click on the drop arrow for **Colour** and select **Dark Maroon** (the bottom right colour in the colour swatch), then click on **[OK]**
- 6 Click on **[OK]** to apply the **Thames** colour category to the selected message

Notice that the new Thames category has been added to the dialog box and it is ticked to show that it will be assigned to the selected message...



For Your Reference...

To **create** a **new colour category**:

1. Click on the **Home** tab, then click on **Categorise** in the **Tags** group
2. Select **All Categories**, then click on **[New]**
3. Type a **Name**, select a **Colour**, then click on **[OK]**

Handy to Know...

- If you like using keyboard shortcuts for functions, you can assign a keyboard shortcut to a new colour category while you are creating it.
- You can **[Rename]** the default colour categories to something more meaningful in the **Colour Categories** dialog box.

ASSIGNING A COLOUR CATEGORY

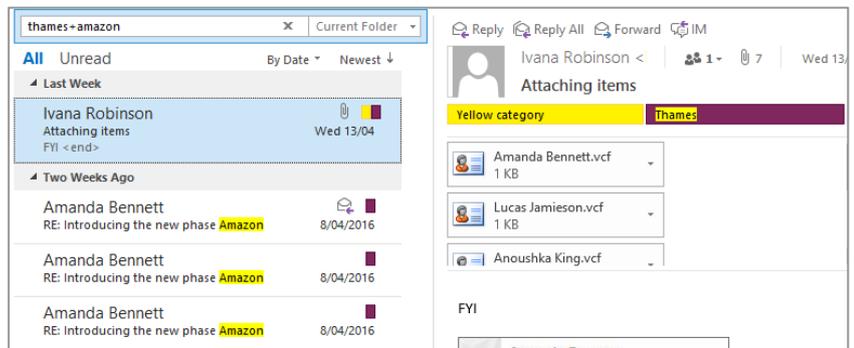
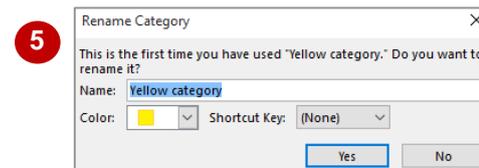
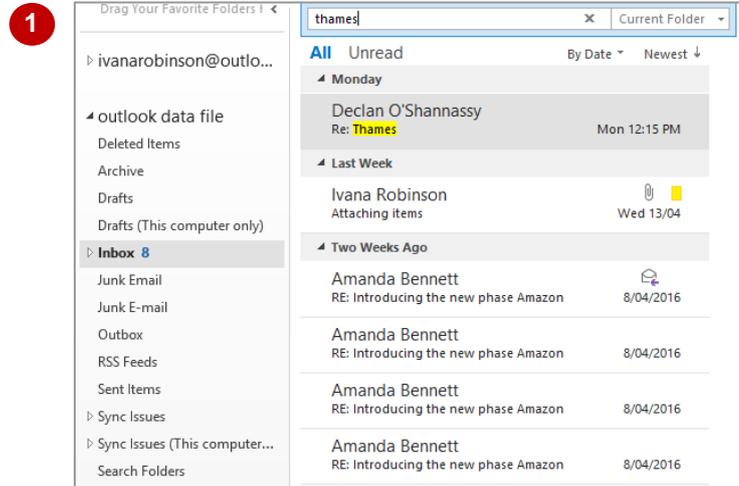
You can assign a colour category to different yet related Outlook items such as notes, meetings and messages that are, for example, associated with the same project. Because the colours are

displayed prominently, it is very easy to identify and organise related items. You can assign a category individually, as a group, in an open item, in a view, plus more.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Type **thames** in the **Instant Search** box to display all messages that refer to **Thames** in the message list
- 2 Ensure the **Home** tab is active, select all messages except for the categorised one, then click on **Categorise** in the **Tags** group
The Thames colour category will appear in the gallery...
- 3 Click on **Thames** to apply this colour category to the messages
A maroon icon will appear in the Categories columns. Let's assign a second category to some of the messages...
- 4 Click on **Close Search** then type **Thames+Amazon** in the **Instant Search** box
- 5 Select all email messages and repeat step 3 to apply the **Yellow Category** as well
The first time that you assign a default colour category, you will be prompted to rename the category...
- 6 If the prompt for renaming the category displays, click on **[No]**



6

For Your Reference...

To **assign** a **colour category** to a **message**:

1. Select the desired message/s
2. On the **Home** tab, click on **Categorise** in the **Tags** group
3. Select the colour category

Handy to Know...

- Only the 15 most recently-used colour categories appear in the **Categorise** gallery. To see all colours, select **All Categories** to open the **Colour Categories** dialog box.
- The **Colour Categories** dialog box lets you assign multiple categories to an item at once by clicking on the desired checkboxes.

FINDING MESSAGES WITH CATEGORIES

Using **Instant Search**, you can quickly and easily find all messages that have been assigned to one or more categories. Once you have initiated **Instant Search**, you can use a combination of

the tools on the contextual tab, such as the **Categorised** tool, and logical operators, such as NOT, OR and so on, to find the desired messages.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 Click in the **Instant Search** box
- 2 Click on **Categorised** in the **Refine** group to open the **Categorised** gallery, then select **Themes**

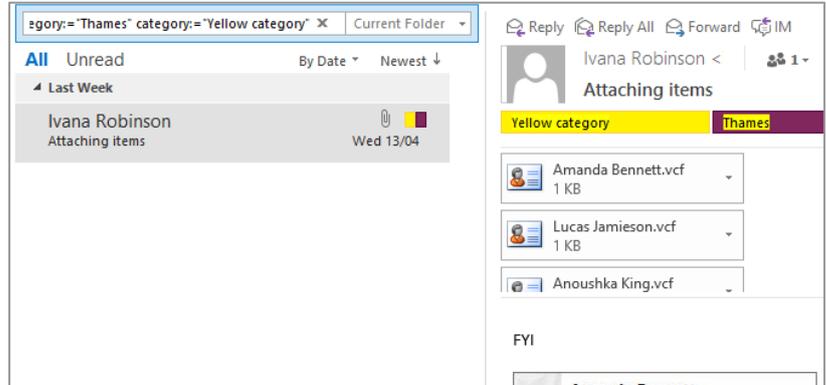
Outlook will add the search criterion to the **Instant Search** box and will find all messages conforming to it.

You can add a second category to find messages that have had two categories assigned to them...

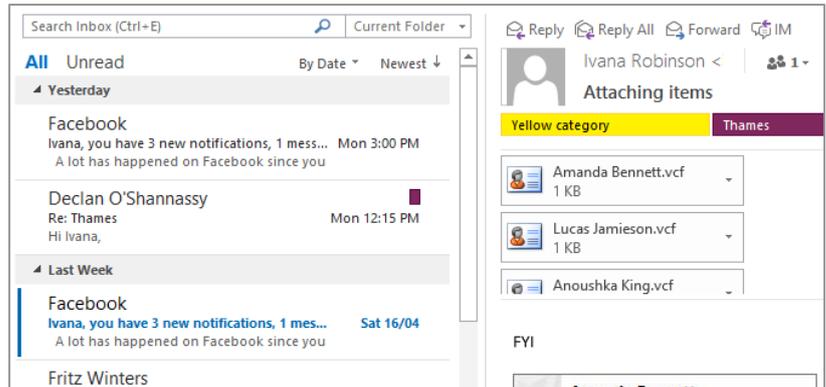
- 3 Repeat step 2 to select the **Yellow Category**

Now only messages with both categories applied will appear in the message list. Notice that you didn't have to specify the logical operator AND in this situation – it was implied...

- 4 Click on **Close Search** to turn off the search facility



2



3

For Your Reference...

To **find messages** that have had one or more **colour categories assigned** to them:

1. Click in **Instant Search**
2. Click on **Categorised** in the **Refine** group, then select the category
3. Repeat step 2 for each additional category

Handy to Know...

- You can display a list of all categorised messages by clicking in the **Instant Search** box, clicking on **Categorised** and selecting **Any Category**. You can then sort the list by clicking on the **View** tab and clicking on **Categories** in the **Arrangement** group.

REMOVING CATEGORIES FROM MESSAGES

If you realise that you have applied the wrong category to a message or perhaps you've simply applied a category to the wrong message, correcting the mistake is a breeze. You can

remove a category from a message and then quickly apply the correct category to the correct message.

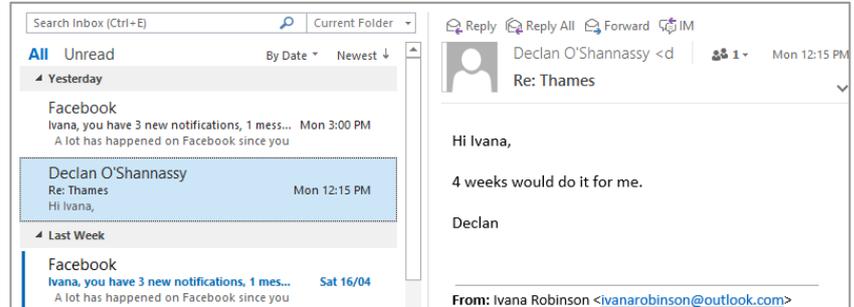
Try This Yourself:

Same
File

Continue using the previous file with this exercise...

- 1 In the message list, click on the **Declan O'Shannassy** message with the **Re: Thames** subject
- 2 On the **Home** tab, click on **Categorise** in the **Tags** group and select **Clear All Categories** to remove the **Thames** category from the message
- 3 Click on the **Amanda Bennett** message with the **Thames update** subject, then click on **Categorise** in the **Tags** group and select **All Categories** to open the **Colour Categories** dialog box
- 4 Remove the tick from the **Yellow Category** checkbox, then click on **[OK]**

Notice that the **Maroon (Thames)** category is still assigned to the message



2

For Your Reference...

To **remove categories** from a **message**:

1. Select the message/s in a message list
2. On the **Home** tab, click on **Categorise** in the **Tags** group
3. Select **Clear All Categories** to remove all, or Select **All Categories** to remove specific categories when more than one is applied

Handy to Know...

- You can remove a colour category from an open message. To do this, click on **Categorise** and select **Clear All Categories** to remove all categories from the open message or select the category to remove only one category when more than one has been applied to the message.

DELETING A COLOUR CATEGORY

If you are no longer use a particular colour category, you can delete it from the category list. This means that you will no longer be able to assign the deleted category to items unless you

recreate it again. Although Outlook specifies that items that were previously marked with the deleted colour category will not be affected, this doesn't appear to be the case.

Try This Yourself:

Same
File

Continue using the previous file with this exercise...

- 1 On the **Home** tab, click on **Categorise** in the **Tags** group and select **All Categories** to open the **Colour Categories** dialog box

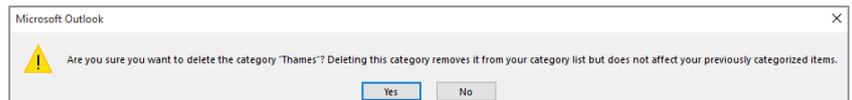
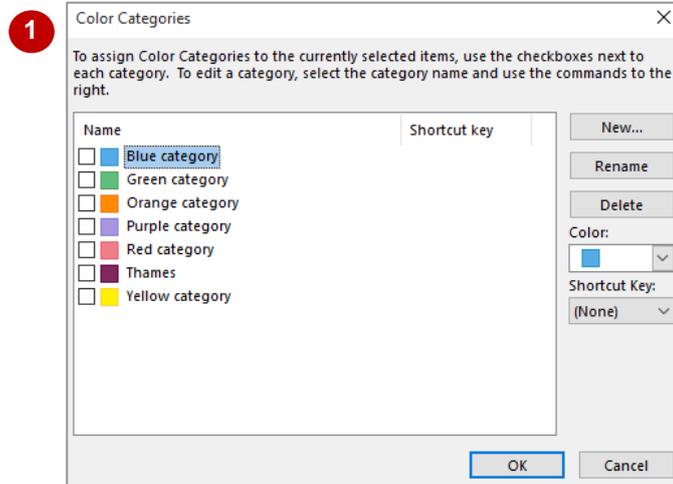
Let's delete the **Thames** category...

- 2 Click on the word **Thames** to select the category, then click on **[Delete]**

You will be asked to confirm your intention...

- 3 Click on **[Yes]** to delete the **Thames** category from the **Categorise** gallery, then click on **[OK]** to close the **Colour Categories** dialog box

As soon as you scroll through the message list or click on a message, the maroon colour category (**Thames**) that had previously been assigned to several messages will disappear. We think this is a bug as previously categorised items aren't supposed to be affected



2

For Your Reference...

To **delete** a **colour category**:

1. Click on the **Home** tab, click on **Categorise** in the **Tags** group, then select **All Categories**
2. Click on the Colour Category **Name**
3. Click on **[Delete]**
4. Click on **[Yes]**, then click on **[OK]**

Handy to Know...

- You can change the colour of the categories using the **Colour Categories** dialog box. To do this, click on **Categorise** and select **All Categories**. Click on the Colour Category **Name**, select the desired **Colour** and click on **[OK]**. All items with that category will be updated.

CHAPTER 11 WORKING WITH RULES

InFocus

You can organise and manage your Outlook mail using **rules**. A rule is an action that Outlook takes automatically when you receive or send a message that meets the conditions you specify in the rule.

In this session you will:

- ✓ gain an understanding of how rules can help you manage your messages
- ✓ learn how to create a new rule from a predefined template
- ✓ learn how to select the conditions for a rule
- ✓ learn how to set the actions for a rule
- ✓ learn how to specify exceptions for a rule
- ✓ learn how to name and review a rule
- ✓ learn how to test a new rule
- ✓ learn how to manage existing rules.

ABOUT RULES

A **rule** is an action that is performed automatically by Outlook on an incoming or outgoing email message that meets all of the conditions that you specified when creating the

rule. Rules do not affect email messages that have been read, only unread messages.

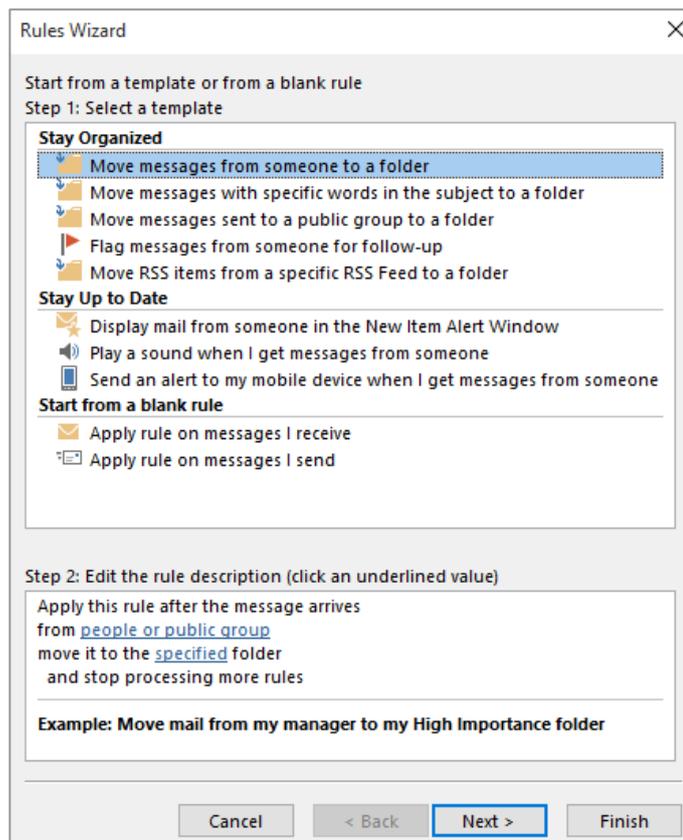
The Rules Wizard

One of the easiest ways in which you can create a rule is by using the **Rules Wizard**. This wizard contains several predefined templates for creating the most commonly-used rules, plus the ability to create a rule from a blank rule template – in which case you specify your own conditions, actions and exceptions.

Rules tend to be grouped into one of two major groups – organisation and notification. As a result of this the **Rules Wizard** divides its templates accordingly.

Stay Organised These rules help you to file messages to the appropriate folder and to follow up on messages. For example, you might create a rule for messages from the sender, 'Brad Jones', with the word 'Europe' in the Subject, to be flagged for follow-up, categorised as 'European Sales', and moved to the European Sales folder.

Stay Up to Date These rules notify you when you receive a specific type of message. For example, you can create a rule that will play a specified sound when you receive messages from a particular person.



CREATING A NEW RULE FROM A TEMPLATE

The easiest way to create a new rule is to base it on one of the pre-existing templates found in the **Rules Wizard**. There are two main categories for rules: **Stay Organised** and **Stay Up to Date**. The

Stay Organised template rules help you to file or follow-up certain types of message. The **Stay Up to Date** template rules notify you when you receive certain types of messages.

Try This Yourself:

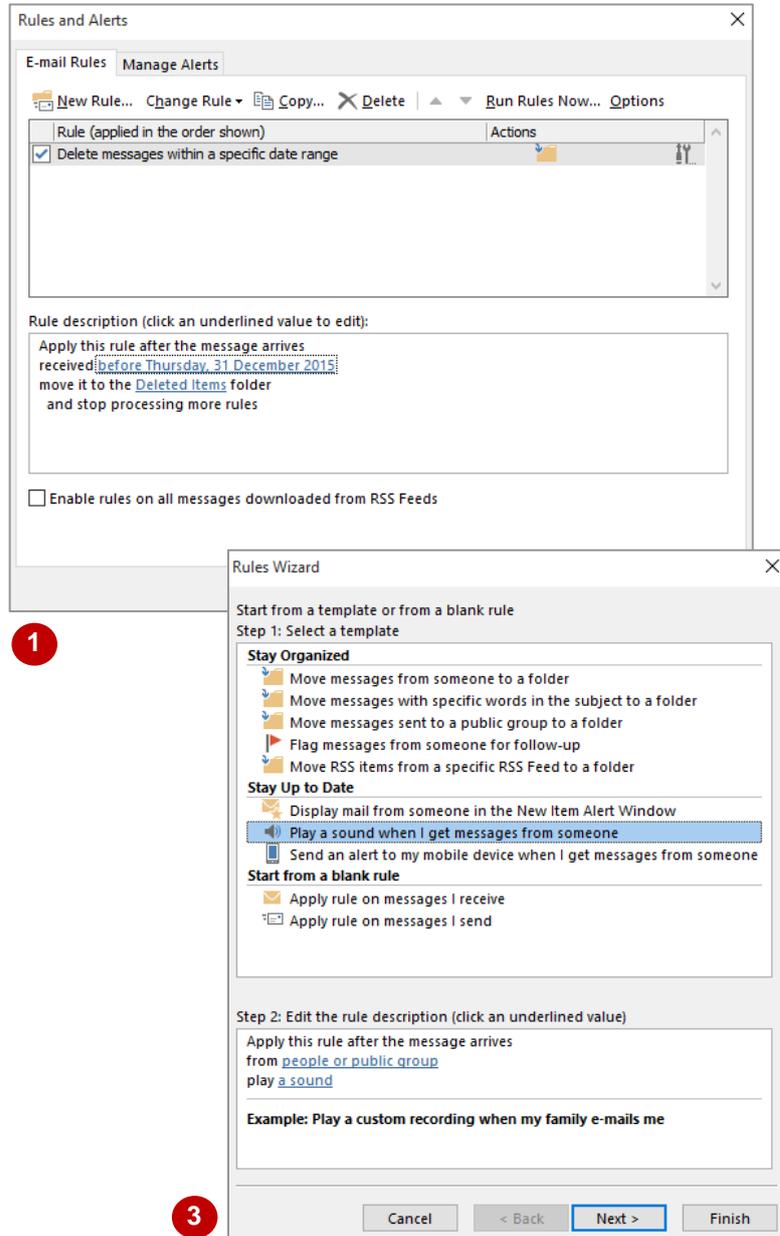
Open File

Before starting this exercise you **MUST** open the file *Outlook_18.pst...*

- 1 Click on the **File** tab, then click on **[Manage Rules & Alerts]** to open the **Rules and Alerts** dialog box
- 2 Click on **[New Rule]** to open the **Rules Wizard**
- 3 Click on **Play a sound when I get messages from someone** under **Stay Up to Date**

Notice the description of the rule, plus an example of how the rule can be used, appears in the bottom box under step 2. You can change the settings for the underlined values in this box by clicking on them. But we won't in this exercise...

- 4 Click on **[Next]** to proceed to the next step of the wizard
- Leave this dialog box open for the next exercise



For Your Reference...

To **create** a **new rule based** on a **template**:

1. Click on the **File** tab, then click on **[Manage Rules & Alerts]**
2. Click on **[New Rule]**
3. Select the desired template
4. Click on **[Next]**

Handy to Know...

- You can create a rule directly from a specific message. For example, you can create a rule to move messages from the selected sender to a specific folder by right-clicking on the message, selecting **Rules > Create Rule** and then completing the **Create Rule** dialog box.

SELECTING THE RULE CONDITIONS

When using the **Rules Wizard** to create a new rule based on a template, you can define the conditions that must be met before the rule will be activated. Outlook provides a list of predefined

conditions from which you can choose. Once you select the main conditions, you can then refine them by editing the rule description.

Try This Yourself:

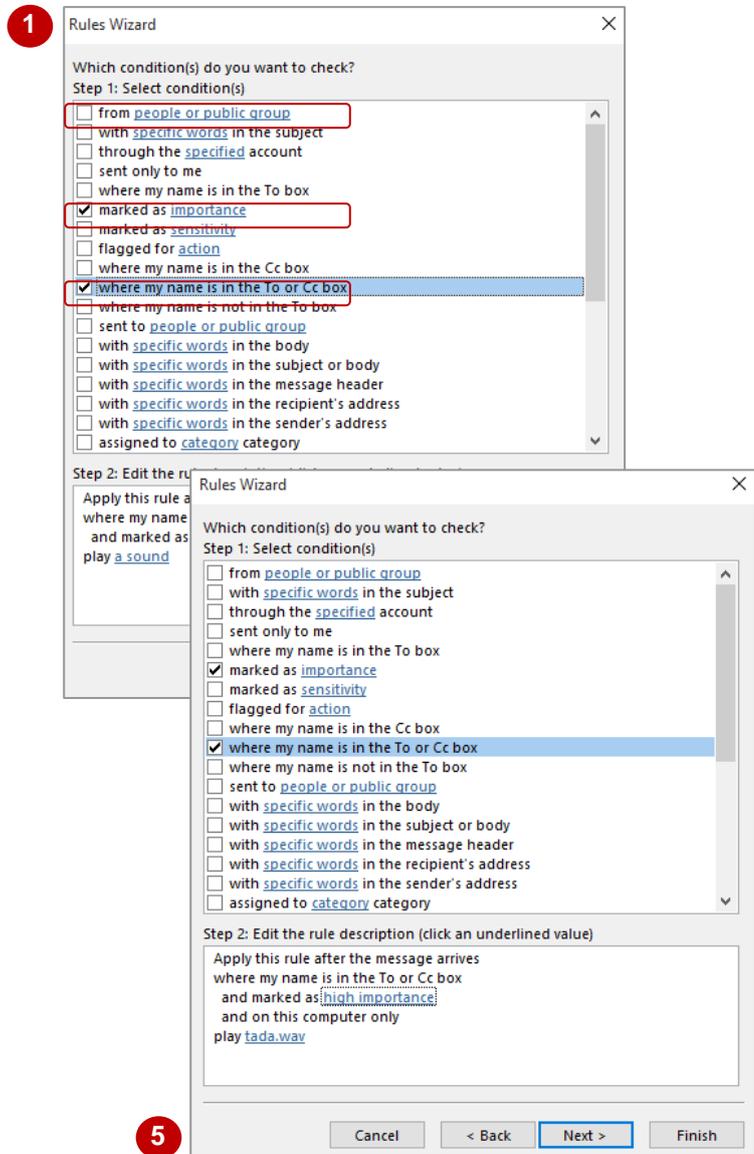
Continue using the previous file with this exercise...

- 1 Remove the tick from the **from people or public group** checkbox, then click in the checkboxes for **marked as importance** and **where my name is in the To or cc box** so they both appear ticked

Let's refine the conditions...

- 2 Click on **importance** in the **Step 2** box (in the bottom half of the dialog box) to open the **Importance** dialog box
- 3 Click on the drop arrow for **specify the importance to look for** and select **High**, then click on **[OK]**
- 4 Click on **a sound** in the **Step 2** box to open the **Select a Sound to Play** dialog box
- 5 Navigate to the **Course Files for Microsoft Outlook 2016** folder, click on **tada.wav** and then click on **[Open]**
- 6 Click on **[Next]** to proceed to the next step of the wizard

Leave this dialog box open for the next exercise



For Your Reference...

To **set conditions** for a **new rule**:

1. Open the **Which condition(s) do you want to check** page of the **Rules Wizard**
2. Select the desired conditions in **Step 1**
3. Edit the rule description in **Step 2**
4. Click on **[Next]**

Handy to Know...

- You can apply multiple descriptions (criteria) to any rule you create. But Outlook will not activate the rule unless a message meets ALL of the rule's criteria.

SELECTING THE RULE ACTIONS

Once you have selected the conditions for a new rule, you are then ready to select the **actions** that you want the rule to take when the specified conditions are met. For example, if you've

created a rule with a condition that looks for messages from a particular sender, you may set the action that these messages must be filed to a specific folder.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 Ensure that **play a sound** under **Select action(s)** appears ticked, then click in the checkbox for **assign it to the category category** until it appears with a tick

Let's edit the rule description...

- 2 Click on **category** in the **Step 2** box to open the **Colour Categories** dialog box

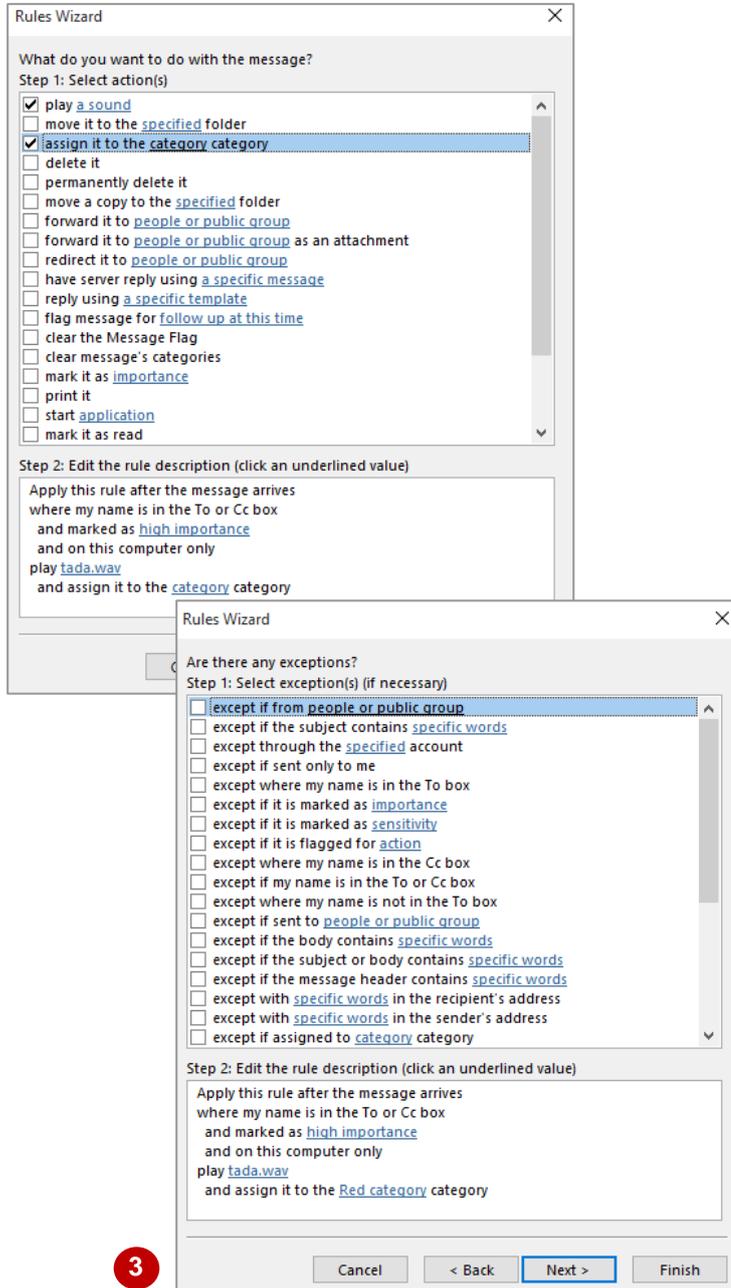
- 3 Click in the checkbox for **Red Category** so it appears with a tick, then click on **[OK]** to return to the **Rules Wizard**

The **Rename Category** dialog box will appear asking if you want to rename the category...

- 4 Click on **[No]**

- 4 Click on **[Next]** to proceed to the next step of the wizard

Leave this dialog box open for the next exercise



For Your Reference...

To **select** the **rule actions**:

1. Open the **What do you want to do with the message** page of the **Rules Wizard**
2. Select the desired actions in **Step 1**
3. Edit the rule description in **Step 2**
4. Click on **[Next]**

Handy to Know...

- If you work in an organisation that uses **Microsoft Exchange**, by default, messages that you forward to external email addresses outside your organisation using a rule will not be sent. This setting aims to help prevent the disclosure of corporate data and is controlled by your Exchange administrator.

SELECTING THE RULE EXCEPTIONS

Once you have specified the conditions and actions for a new rule, you can set **exceptions** to the rule if desired. For example, your rule may specify that when you receive a message from

members of a particular distribution group, the message will be forwarded to your boss. If messages from a specific person in the list don't need to be forwarded, select them as an exception.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Click in the checkbox for **except if it is flagged for action** so it appears with a tick

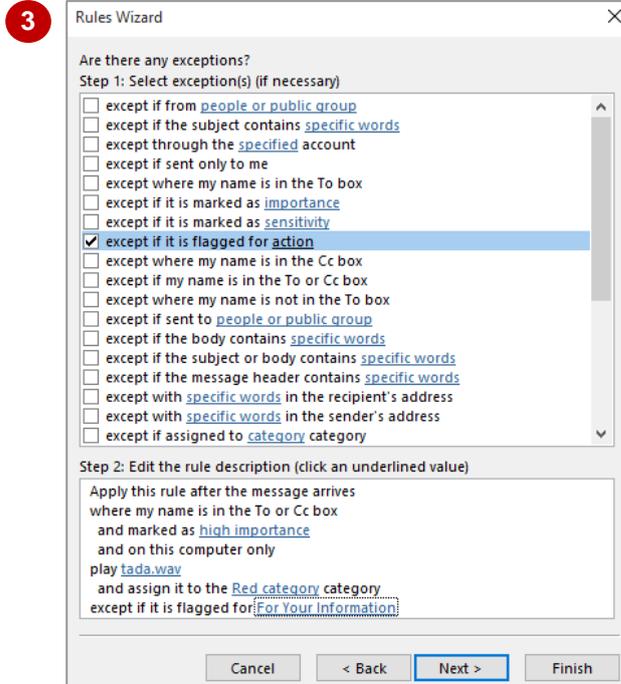
Let's edit the rule description...

- 2 Click on **action** in the **Step 2** box to open the **Flagged Message** dialog box

- 3 Click on the drop arrow for **Enter the Message Flag to check for** and select **For Your Information**, then click on **[OK]** to return to the **Rules Wizard**

- 4 Click on **[Next]** to proceed to the next step of the wizard

Leave this dialog box open for the next exercise



For Your Reference...

To **select** the **rule exceptions**:

1. Open the **Are there any exceptions** page of the **Rules Wizard**
2. Select the desired exceptions in **Step 1**
3. Edit the rule description in **Step 2**
4. Click on **[Next]**

Handy to Know...

- You can make any changes to the rule as you are creating it by simply clicking on **[Back]** to return to the desired page of the **Rules Wizard**.

NAMING AND REVIEWING THE RULE

After specifying the various elements comprising a new rule, the final step involves giving the new rule an appropriate name, deciding whether or not to turn it on and checking that its details will

produce the desired effects. An example of when you might create a rule that you want to be activated under special circumstances could be when you are away from the office on holidays.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

1 Type **High Importance Messages with Sound** in the **Step 1: Specify a name for this rule**

2 Ensure that **Turn on this rule** in the **Step 2** box appears with a tick

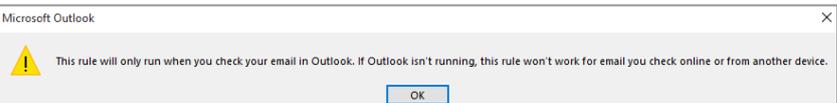
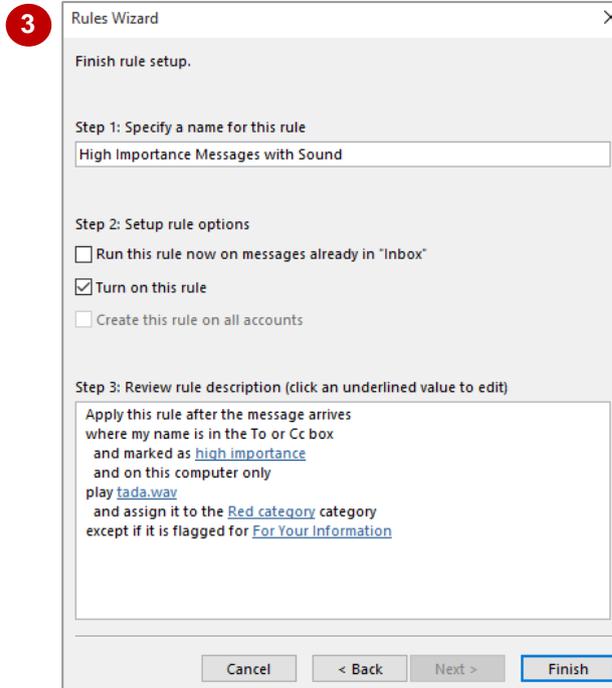
If you remove the tick from this checkbox, you will turn off the rule and it will not be applied to any messages...

3 Read through the rule description in the **Step 3** box and ensure that it looks identical to the example shown

4 Click on **[Finish]** to return to the **Rules and Alerts** dialog box

If a message appears informing you that this rule will only work when Outlook is running click on **[OK]**...

5 Click on **[OK]** and press **Back** to return to the mail folders



For Your Reference...

To **finalise** a rule:

1. Open the **Finish rule setup** page of the **Rules Wizard**
2. Specify a name in **Step 1**
3. Select to turn the rule on or off in **Step 2**
4. Review the rule's details in **Step 3**
5. Click on **[Finish]** and then on **[OK]**

Handy to Know...

- During the final step of creating a rule, you can specify to run this rule now on the default Mail folders by clicking in the **Run this rule now on messages already in "folder"** checkbox in the **Step 2** box on the **Finish rule setup** page of the **Rules Wizard**.

TESTING THE RULE

Once you have created a new rule, don't just trust that you have got everything right. After all, we're all humans – and humans make mistakes. Ensure that you take the time to send or receive,

as required by the rule, a message that meets the conditions of your rule so you can check that the rule performs the desired actions on the message.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 Click on the **File** tab, then click on **[Options]** to open the **Options** dialog box

We'll need to turn off the standard Outlook sound in order to test the rule...

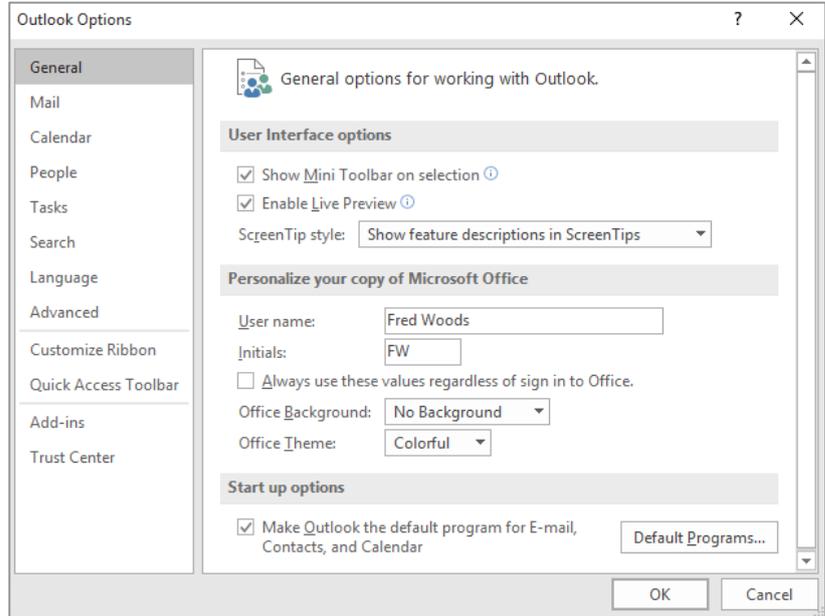
- 2 Click on **Mail** to display the Mail options

- 3 Remove the tick from the **Play a sound** checkbox under **Message arrival**, then click on **[OK]**

- 4 Create a new message and address it to yourself

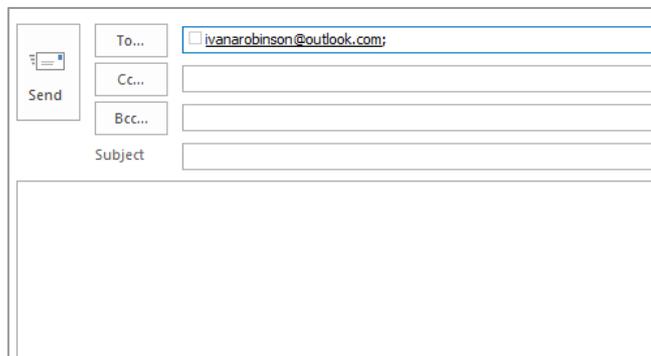
- 5 Click on **High Importance** in the **Tags** group, then click on **Send**

When the message arrives in your Inbox, you should hear a "ta da" sound and it should appear with a red category icon



1

3



For Your Reference...

To **test** a **rule**:

1. Send or receive a message that conforms to all actions included in the rule
2. Ensure that the desired actions were performed

Handy to Know...

- You can run a rule periodically. To do this click on the **File** tab, click on **[Manage Rules & Alerts]**, clear the checkbox for the rule to turn it off, then click on **[Run Rules Now]**. Tick the rule under **Select rules to run**, select the **Run in Folder** and **Apply rules to**, and then click on **[Run Now]**.

MANAGING EXISTING RULES

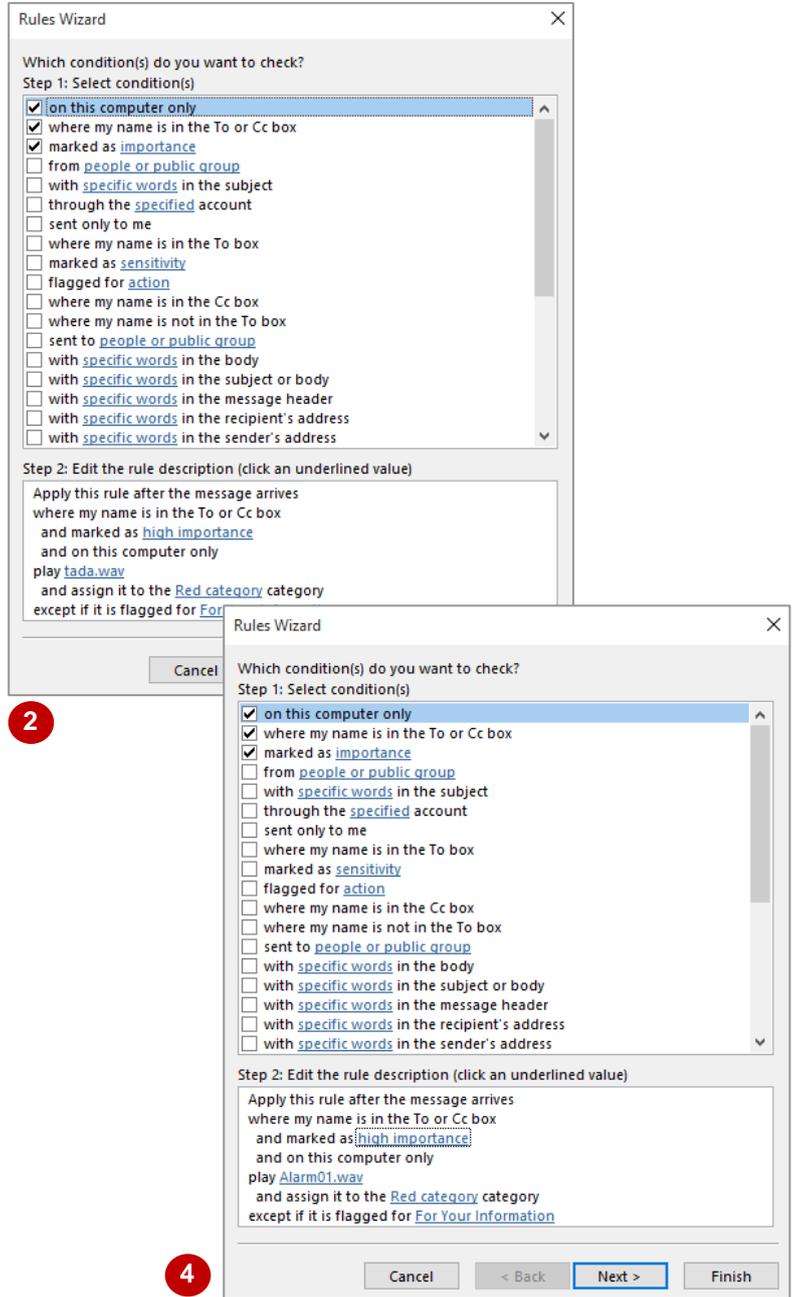
Once you have created a rule, you can easily manage and control the rule using the **Rules and Alerts** dialog box. You can use this dialog box to turn on and off specific rules, change their

settings, copy and delete them, choose to run all of the rules that are currently turned on and, using **[Options]**, you can import and export rules between different versions of Outlook.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Click on the **File** tab, click on **[Manage Rules & Alerts]** and ensure the **E-mail Rules** tab is active
- 2 Ensure that the **High Importance Messages with Sound** rule is selected, click on **[Change Rule]**, then select **Edit Rules Settings** to open the **Rules Wizard**
- 3 Click on **tada.wav** in the **Step 2** box to open the **Select a Sound to Play** dialog box
- 4 Ensure that the course files folder is open, click on **Alarm01.wav**, then click on **[Open]**
- 5 Click on **[Finish]** to complete the changes, then click on **[OK]**
If a message appears informing you that this rule will only work when Outlook is running click on [OK]...
- 6 Click on **Apply**, then **[OK]** then click on the **Back** arrow and create a new message and address it to yourself
- 7 Click on **High Importance** in the **Tags** group, then click on **Send**
You'll hear a sound when you receive the mail



For Your Reference...

To **change** an **existing rule**:

1. Click on the **File** tab, then click on **[Manage Rules & Alerts]**
2. Select the desired rule
3. Click on **[Change Rule]** and select **Edit Rules Settings**
4. Make the desired changes

Handy to Know...

- You can change the order in which the activated rules (their checkboxes are ticked) are actioned using the **Rules and Alerts** dialog box. To do this, click on the rule to be moved and then click on either **Move Up** or **Move Down**.

NOTES:



CHAPTER 12 JUNK EMAIL

InFocus

Some people love receiving junk mail such as catalogues, brochures, flyers, and the like in the post, while others hate it. Junk mail has now also become prevalent in email.

Fortunately, Outlook has a **Junk Email** filter which allows you to take some control over unwanted and unsolicited email.

In this session you will:

- ✓ gain an understanding of spamming and junk email
- ✓ gain an understanding of phishing junk emails
- ✓ gain an understanding of the junk email options
- ✓ learn how to add senders to the **Blocked Senders List**
- ✓ learn how to mark messages as safe
- ✓ learn how to manage the **Blocked** and **Safe Senders Lists**
- ✓ learn how to import a **Blocked Senders List**
- ✓ learn how to export a **Blocked Senders List**
- ✓ learn how to review and delete junk email.

SPAMMING AND JUNK EMAIL

Spamming involves flooding the internet with many copies of the same email message that gets sent to people who would not otherwise choose to receive it. Spam messages can be

commercial advertising (often for very cheap products such as pharmaceuticals), offers of free goods or prizes, get-rich-quick schemes, or other offers that could result in you taking part in a scam.

The Problem Of Spamming And Junk Email

While the occasional message promoting a product or service might be a nice diversion to an otherwise routine day, a constant barrage of these types of messages soon becomes a nuisance. Junk mail sent through the post presents a cost burden on the sender – brochures need to be printed and stamps need to be purchased. With junk email, however, there is virtually no cost to the sender as everything is generated and sent electronically.

Spam messages differ from regular printed junk mail in another major way – responding to a spam message can cause you many problems. There are a few different forms of malicious software you may come across. For instance, **spyware** (also known as **malware**) is software that scammers try to install on your computer to see the websites you visit, files used, the details you store on your computer, etc). Or you may find that malicious software is used in the form of **key loggers** (specific spyware that is downloaded on to your computer and records the keys you press and sends it back to the scammer). As a result of malicious software you might be bombarded with more spam messages, your credit card or other personal details might be stolen or you could pay for something that never arrives or is not what you thought it would be.

The Difficulty Of Stopping Messages

The benefit, and ultimately the underlying flaw, with email is that once someone has your email address they can send you a message. Unless there are very elaborate checking points, known as **firewalls**, these messages eventually end up in your Inbox.

How Outlook Helps Combat Unwanted Spam And Junk Email

- Since Outlook can't easily prevent junk email from getting to you, it can take appropriate action once the junk email arrives. At home when you receive an unwanted brochure you can throw it straight into the rubbish bin. Outlook allows you to perform a similar act with your junk email. Since there are some consistent patterns associated with junk email, Outlook has included a built-in **Junk E-mail Filter** which it applies automatically to incoming messages. The filter doesn't single out a particular sender or type of message, but rather works on factors such as the content of the message and the time it was sent. Any messages that are caught in the filter are sent to the **Junk E-mail** folder where you can review and delete them.
- Spammers are constantly finding new ways around these filters. If you regularly receive unwanted email from a particular sender and cannot get the sender to stop, you can add the sender to the **Blocked Senders** list. Any mail from this sender or the sender's domain will then be deflected to the **Junk E-mail** folder. Conversely, you can also set up a **Safe Senders** list. Any mail received from these senders or the sender's domains will go directly to your Inbox even if the **Junk E-mail Filter** might otherwise catch them based on the content of the message.
- Junk email senders often send messages in HTML format which include pictures or sounds from an external source on the internet that act as a '**web beacon**'.
- When you open one of these messages and the pictures or sounds automatically download, you are inadvertently verifying to the sender's server that your email address is valid. Your address can then be sold to spammers. To minimise this problem, Outlook blocks automatic picture downloads by default. If you're sure that the message is from a trustworthy source you can unblock the pictures or other external content.

How Can We Help?

- Don't open suspicious or unsolicited emails – delete them.
- Don't click on any links, open any attached files or call a telephone number in a spam message.
- NEVER reply to spam messages.
- NEVER purchase anything through junk email or claim a prize.

PHISHING AND JUNK EMAIL

Phishing refers to emails that try to trick you into disclosing personal details such as bank account numbers, passwords and credit card numbers. The scammers can use this data to steal your

identity, money or both. Phishing emails appear to be sent by legitimate companies, such as banks, including details such as genuine logos and links to websites that are convincing fake home pages.

How To Spot A Phishing Scam

- The email might claim to be from a genuine company such as a bank, financial institution or telecommunications provider. These messages will appear to be from a legitimate internet address. For example, the address in the **From** field in the email may be *lh@nab.com.au*. The message will contain a link to a website where you will be prompted to enter your bank details. Usually there will be a repercussion stated in the email if you don't follow the link, such as 'your account will be closed or suspended'.
- The email might claim that your details are needed for a security upgrade, to verify your account, or to protect you from a fraud threat.
- The email doesn't address you by your correct name.
- The email might contain typing errors and grammatical mistakes.

How Outlook Detects Phishing Messages

Because it can be hard to distinguish a phishing email message from a legitimate email message sent by, for example, your bank, the **Junk E-mail Filter** evaluates each incoming message to see if it is suspicious, contains suspicious links, or was sent from a spoofed email address. Note: suspicious message detection is turned on only when junk email filtering is turned on.

If the filter determines a message is both **spam** and **phishing**, the message is sent to the **Junk E-mail** folder, the message format is changed to plain text format, and the links in the message are disabled. In addition, the **Reply** and **Reply All** functionality is disabled and any attachments in the message are blocked.

If the **Junk E-mail Filter** does not consider a message to be **spam** but does consider it to be **phishing**, the message is left in the **Inbox**, but any links in the message are disabled and you cannot use the **Reply** and **Reply All** functionality. In addition, any attachments in the suspicious message are blocked.

How Can We Protect Ourselves From Phishing Scams?

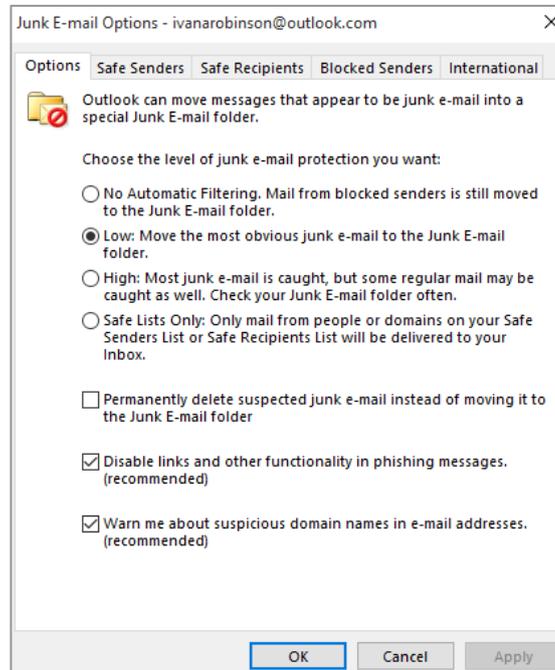
- Don't open suspicious or unsolicited emails – delete them.
- Don't click on any links, open any attached files or call a telephone number in a spam message.
- NEVER disclose your credit card, online account details or other personal details through an email.
- NEVER enter your personal, credit card or online account information on a website unless you are certain it is genuine. If you want to access an internet account website, use a bookmarked link or type the web address yourself into your web browser – NEVER click on a link in an email to access your account.
- Check the website address carefully – scammers often set up fake websites with addresses that are very similar to valid companies.

Now that you know how to avoid being phished, what should you do if you receive a phishing email message? Visit the website of the company from whom the email appears to have been sent and take the time to notify them of the suspicious email. Many companies do want to know if their company name is being used to scam people, and you'll find scam and spoof reporting links within some of these websites.

UNDERSTANDING JUNK EMAIL OPTIONS

To help deal with spam, the **Junk E-mail Filter** is turned on by default and the protection level is set to **No Automatic Filtering**. This filter checks each incoming message and moves suspected

spam to the **Junk E-mail** folder. If you feel that the filter is detecting too few spam messages, you can increase the level of protection using the options in the **Junk E-mail Options** dialog box.



Junk Email Options

No Automatic Filtering

Although this option switches off the automatic **Junk E-mail filter**, Outlook continues to check incoming mail by using the domain names and email addresses in your **Blocked Senders** list. Messages from these sources are still sent to the **Junk E-mail** folder.

Low

A low level of filtering is performed on incoming mail. Use this option if you don't get many junk emails.

High

A high level of filtering is performed on incoming mail. Use this option if you frequently receive junk emails. Note that if you do select this option, you should regularly check your **Junk E-mail** folder as legitimate messages may be moved there accidentally.

Safe Lists Only

Only messages from **Safe Senders** and **Safe Recipients** are allowed to pass into your Inbox. All other mail is treated as junk email. This is the most extreme form of protection.

Permanently delete suspected junk e-mail instead of moving it to the Junk E-mail folder

This option permanently deletes suspected junk emails without sending them first to the **Junk E-mail** folder. This option does NOT send the deleted messages to the **Deleted Items** folder! Although this may sound helpful, selecting this option negates your ability to check for valid messages that were accidentally classified as junk email.

Disable links and other functionality in phishing messages

This option disables links and the **Reply** and **Reply All** functionality in phishing messages.

Warn me about suspicious domain names in e-mail addresses

This option warns you when a domain name (@example.com.au) uses certain characters to make it appear to be a well-known brand or website. The intention is to trick you into thinking it is a legitimate email address when in fact it is a fake.

MARKING MESSAGES AS JUNK MAIL

While Outlook has its own **Junk E-mail filter**, a lot of annoying junk mail will still get through to your Inbox. Outlook lets you add the senders of these messages to the **Blocked Senders** list.

Whenever future messages arrive from these people, the messages will automatically be sent to the **Junk E-mail** folder irrespective of whether they are picked up by the filter or not.

Try This Yourself:

Open File

Before starting this exercise you **MUST** open the data file Outlook_04.pst...

1

Scroll down to the bottom of the **Inbox**

The last four messages are examples of spam messages...

2

Click on each of the four messages to display them in the **Reading** pane and study each example

3

Click on the bottom message, then on the **Home** tab, click on **Junk** in the **Delete** group and select **Block Sender**

A message box may appear informing you that the sender has been added to the **Blocked Senders** list...

4

Click on **[OK]** to close the message box

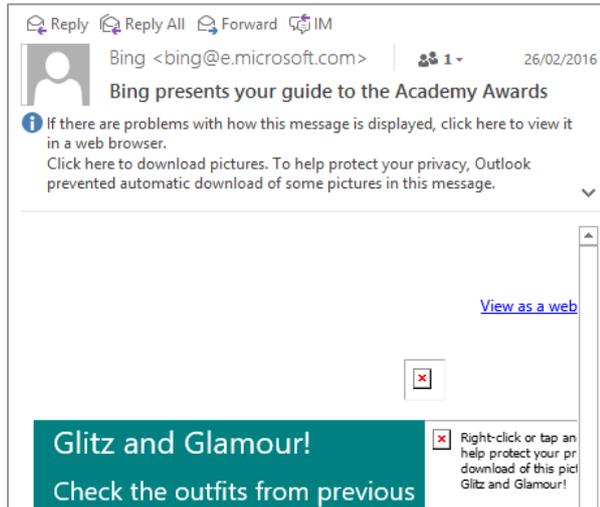
Let's block another sender...

5

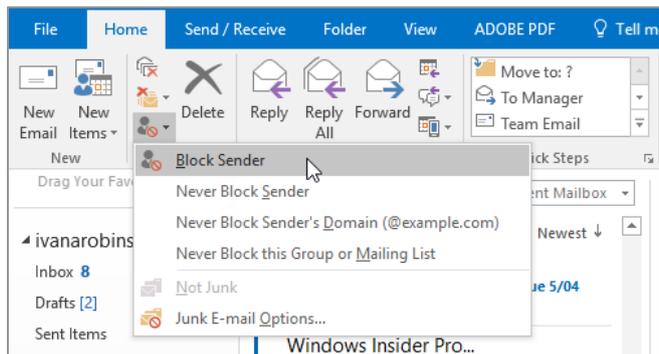
Right-click on one of the **Microsoft Store** messages and select **Junk > Block Sender** to quickly add this sender to the **Block Senders** list

Note: We are not inferring that the sender of this message is a spammer. We've used it for illustrative purposes only

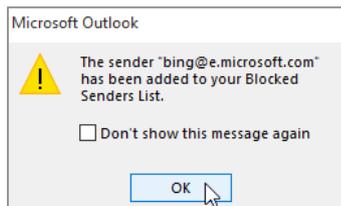
2



3



4



Tip: When you mark a message as junk email by blocking the sender, the message will be moved from your Inbox to your Junk E-Mail folder. This probably will not happen during your training course.

For Your Reference...

To **add** a **sender** to the **Blocked Senders** list.

1. Select the message in a message list
2. On the **Home** tab, click on **Junk** in the **Delete** group
3. Select **Block Sender**

Handy to Know...

- If you're sick of receiving emails from companies that you had previously subscribed to (such as a deals-of-the-day site, online clothing store, etc), you can mark one of the received messages as junk email to add their details to the **Blocked Senders** list.

MARKING MESSAGES AS SAFE

There is always a chance that valid messages will be inadvertently identified as spam by the **Junk E-mail filter** and moved to the **Junk E-Mail** folder. It's therefore important to regularly check

the contents of the **Junk E-Mail** folder. If you find a valid message in this folder, you can nominate the sender or its domain as being **safe** to ensure that future messages get through to your **Inbox**.

Try This Yourself:

Continue using the previous data file with this exercise...

- 1 Click on the **Junk E-Mail** folder in the **Folder** pane
This folder contains a message from a person who is trustworthy. Let's add this person to the Safe Senders list...

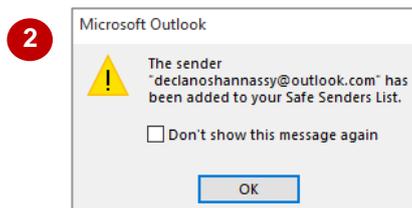
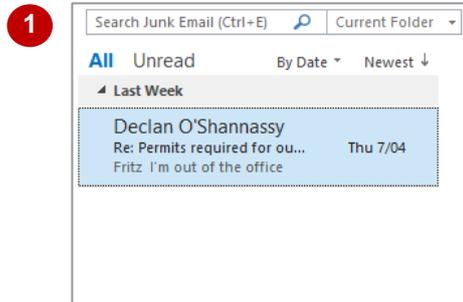
- 2 Ensure that the message from **Declan** is selected, then on the **Home** tab, click on **Junk** in the **Delete** group and select **Never Block Sender**

A message box may appear informing you that the sender has been added to your Safe Senders list...

- 3 Click on **[OK]** to close the message box

Let's add the sender's domain name to the Safe Senders list. This will mean that all messages from that domain, irrespective of the author, will get past the Junk E-Mail filter...

- 4 Right-click on the message, then select **Junk > Never Block Sender's Domain**, then click on **[OK]** to close the message box if it appears



Tip: If you want to avoid seeing potentially objectionable content in the Junk E-Mail folder, turn off the Reading pane for this folder (VIEW tab).

For Your Reference...

To **add senders** to the **Safe Senders list**:

1. Select the message in a message list
2. On the **Home** tab, click on **Junk** in the **Delete** group
3. Select **Never Block Sender**, or
Select **Never Block Sender's Domain**

Handy to Know...

- If you find a legitimate message in your **Junk E-Mail** folder, you can right-click on it and select **Junk > Not Junk**. This will move the message back to its original folder (usually the **Inbox**). Alternatively, you can click on and drag a message from the **Junk E-Mail** folder to the **Inbox**.

MANAGING THE SENDERS LISTS

Outlook allows you to manage and edit both the **Blocked Senders** and **Safe Senders** lists via the **Junk Email Options** dialog box. When you work directly with these lists you can perform a variety

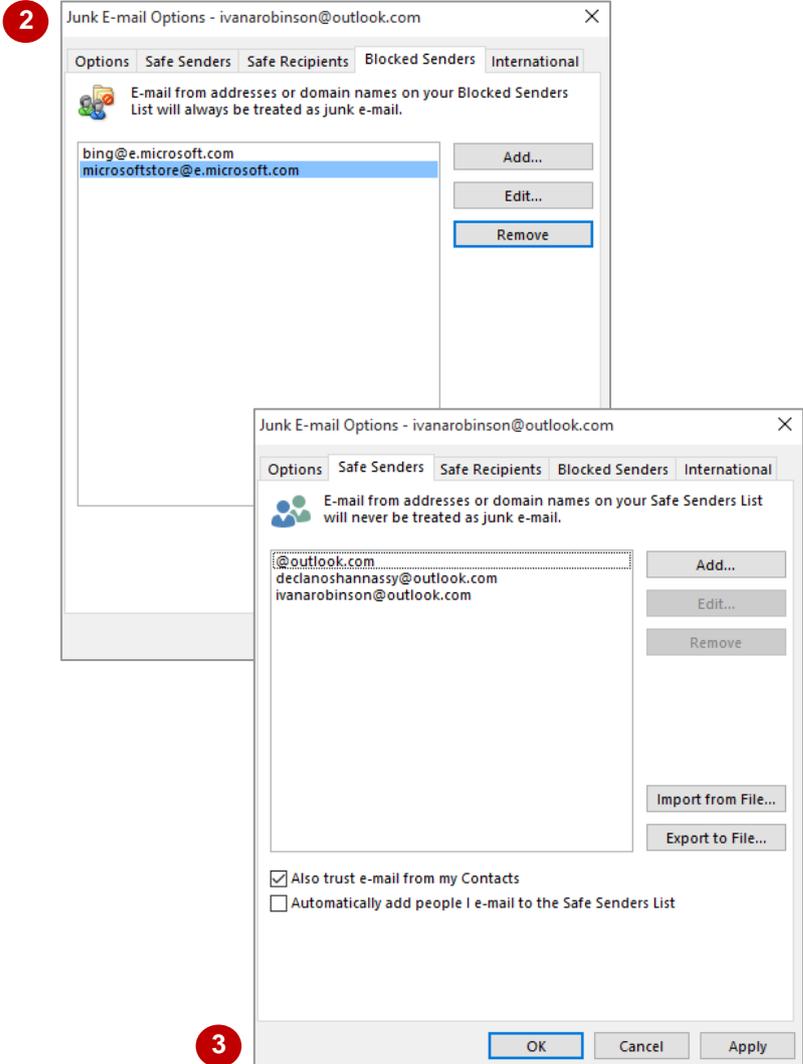
of tasks, such as adding more senders to the lists, deleting entries from the lists, and even exporting copies of the lists for other people to use.

Try This Yourself:

Same File

Continue using the previous data file with this exercise...

- 1 On the **Home** tab, click on **Junk** in the **Delete** group and select **Junk E-mail Options** to open the **Junk E-mail Options** dialog box
- 2 Click on the **Blocked Senders** tab to see the senders whose messages will be treated as junk mail
- 3 Click on the **Safe Senders** tab to see the senders that have been marked as being trustworthy
- 4 Click on **@outlook.com**, then click on **[Remove]** to remove this sender from the **Safe Senders** list
You can also manually add email addresses here...
- 5 Click on **[Add]** to display the **Add address or domain** dialog box
- 6 Type **newsletters@travelonline.com** and click on **[OK]**
- 7 Click on **[OK]** to close the **Junk E-mail Options** dialog box



For Your Reference...

To **work** with the **Senders Lists**:

1. Click on the **Home** tab, then click on **Junk** in the **Delete** group and select **Junk E-mail Options**
2. Click on either the **Blocked Senders** tab or the **Safe Senders** tab
3. Make the desired changes

Handy to Know...

- You can manually add a domain name to the **Safe Senders** list. To do this, open the **Junk E-mail Options** dialog box, click on **[Add]** and type the domain name in the format **@domainname.com.au**.
- By default, messages arriving from your Contacts are treated as being trustworthy.

IMPORTING A BLOCKED SENDERS LIST

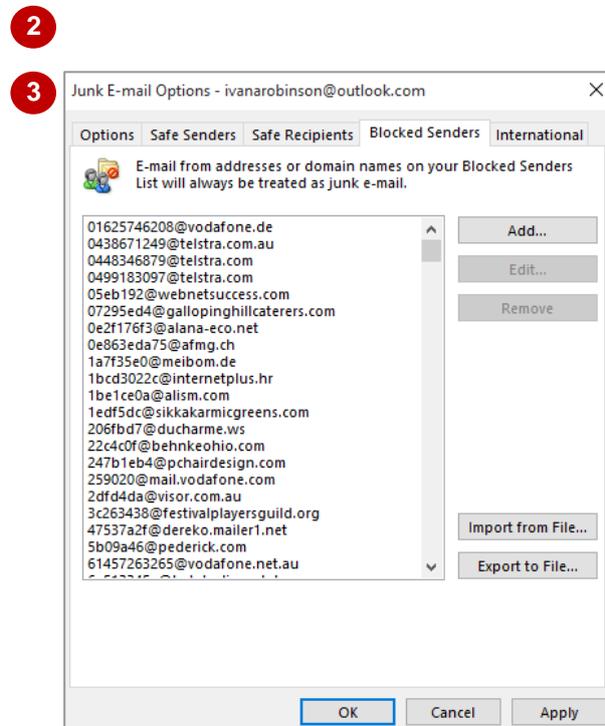
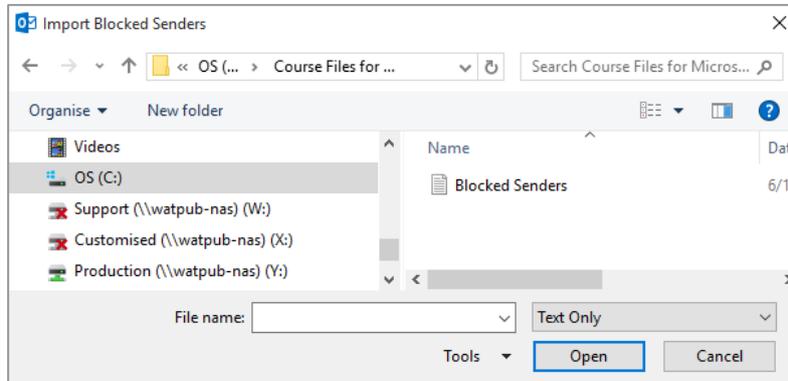
No-one likes to reinvent the wheel! There is a strong possibility that people who are sending junk email to you are sending them to other people as well. To help protect yourself from junk

email you can import a **Blocked Senders** list (which is also known as a **black list**) from someone else who has created one in their Outlook account.

Try This Yourself:

Continue using the previous data file with this exercise...

- 1 Click on **Junk** in the **Delete** group and select **Junk E-mail Options** dialog box, then click on the **Blocked Senders** tab
- 2 Click on **[Import from File]** to open the **Import Blocked Senders** dialog box, then navigate to the **Course Files for Microsoft Outlook 2016** folder
- 3 Click on **Blocked Senders.txt** and click on **[Open]** to import the email addresses into your **Blocked Senders** list
- 4 Click on **[OK]** to close the **Junk E-mail Options** dialog box



For Your Reference...

To **import** a **Blocked Senders List**:

1. Click on **Junk** in the **Delete** group and select **Junk E-mail Options**
2. Click on the **Blocked Senders** tab
3. Click on **[Import from File]**
4. Double-click on the file, then click on **[OK]**

Handy to Know...

- When you import a **Blocked Senders** text file, the email addresses in the text file will be added to the existing entries in your **Blocked Senders** list.

EXPORTING A BLOCKED SENDERS LIST

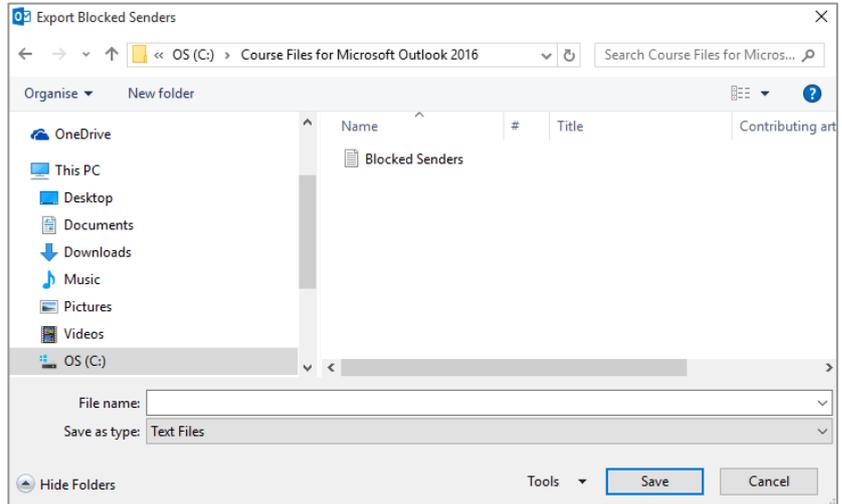
Once you have gathered together a collection of blocked senders, you may wish to share this list with other computer users. You can do this by exporting your list to a text file using the settings

in the **Junk E-mail Options** dialog box. Other users can then import this text file into their own **Blocked Senders** list in Outlook.

Try This Yourself:

Continue using the previous data file with this exercise...

- 1 Click on **Junk** in the **Delete** group and select **Junk E-mail Options** to open the **Junk E-mail Options** dialog box, then click on the **Blocked Senders** tab
- 2 Click on **[Export to File]** to display the **Export Blocked Senders** dialog box, then ensure that the course files folder is open
- 3 Type **My Black List** in **File name**, then click on **[Save]**
- 4 Click on **[OK]** to close the **Junk E-mail Options** dialog box



2

For Your Reference...

To **export** a **Blocked Senders List**:

1. Click on **Junk** in the **Delete** group and select **Junk E-mail Options**
2. Click on the **Blocked Senders** tab
3. Click on **[Export to File]**
4. Name the file and click on **[Save]**

Handy to Know...

- Exporting a **Blocked Senders** list creates a relatively small text file. This makes it easy to email the list to others as a file attachment.

DELETING JUNK EMAIL

The **Junk E-mail Filter** automatically assesses incoming messages to determine whether or not they show junk email characteristics. All messages that appear to be junk email are

moved to the **Junk E-mail** folder. You should regularly review this folder and delete true junk messages and move to the correct folders any legitimate messages that were accidentally added.

Try This Yourself:

Continue using the previous data file with this exercise...

- 1 Click on **Junk E-Mail** in the **Folder** pane to see the messages in this folder

One of these messages is a junk email so let's delete it...

- 2 Click on the **Windows Insider** message to select it and then press **Del** to delete it from the **Junk E-mail** folder

If you definitely want to delete a selected message, press **Shift + Del** to delete it permanently (bypassing the Deleted Items folder)...

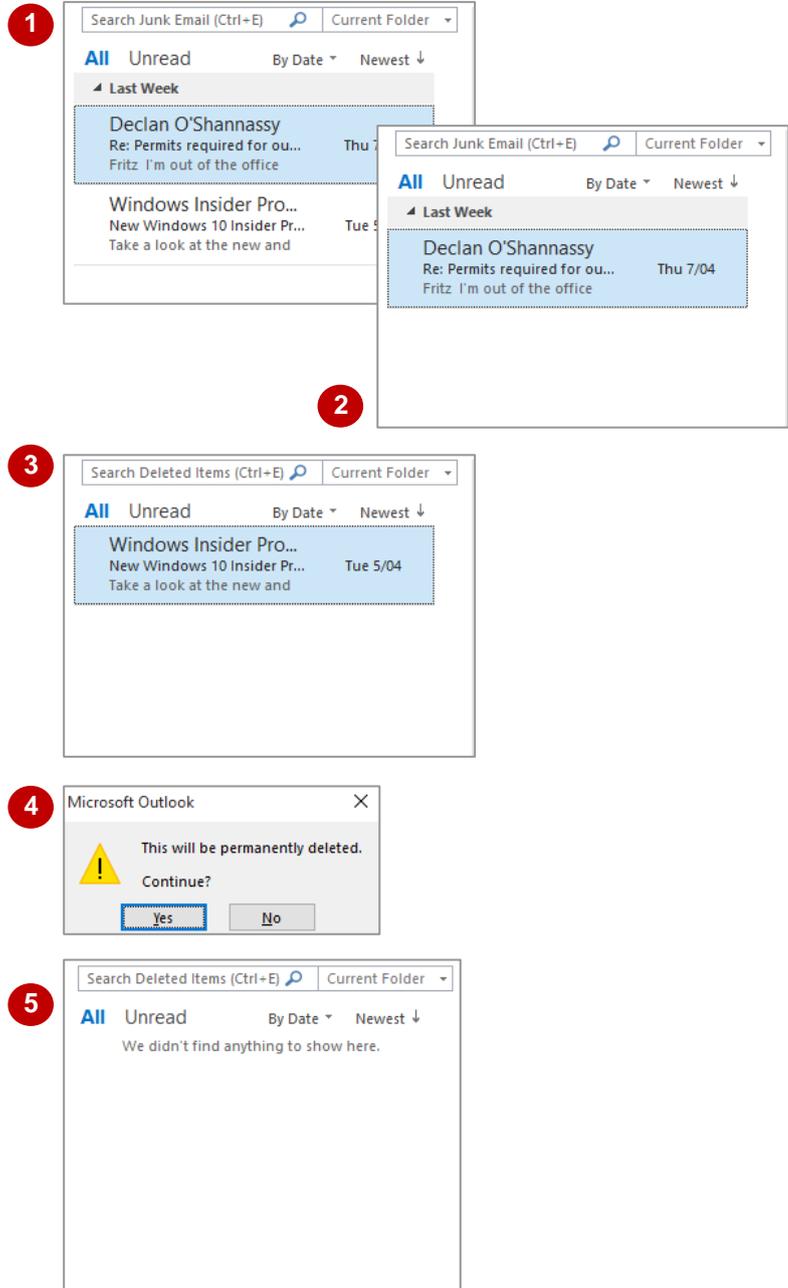
- 3 Click on **Deleted Items** in the **Folder** pane

The **Windows Insider** message has been moved to this folder. Let's delete it from here...

- 4 Ensure that the **Windows Insider** message is selected, then press **Del**

A message will appear asking you to confirm the deletions...

- 5 Click on **[Yes]** to permanently delete the message



For Your Reference...

To **delete messages** in the **Junk E-mail** folder.

1. Click on the **Junk E-mail** folder
2. Select the messages to be deleted
3. Press **Del** to move them to the **Deleted Items** folder, or
Press **Shift + Del** to permanently delete them

Handy to Know...

- You can permanently delete all items from the **Junk E-mail** folder in one step. To do this click on the **Junk E-mail** folder, click on the **Folder** tab and click on **Empty Folder** in the **Clean Up** group. Note that this option is available only for your default Outlook data file (not the course data file).

CHAPTER 13 EMAIL TECHNIQUES

InFocus

Outlook provides many options and techniques that you can adopt as you work with email messages.

In this session you will:

- ✓ gain an understanding of some techniques you can use to effectively manage email
- ✓ learn how to recall a sent message
- ✓ learn how to print a message
- ✓ learn how to print a message list
- ✓ gain an understanding of the various formats that can be used for messages
- ✓ learn how to change the message format for individual messages
- ✓ learn how to select a desired theme or stationery
- ✓ learn how to apply a theme or stationery to single messages
- ✓ learn how to turn off the **Outlook** themes or stationery feature
- ✓ learn how to apply a theme to a new message
- ✓ learn how to save a message as a draft
- ✓ learn how to use a saved message
- ✓ learn how to send a message with voting buttons
- ✓ learn how to respond to a voting message
- ✓ learn how to track voting responses
- ✓ learn how to send automatic responses.

EFFECTIVE EMAIL MANAGEMENT

As you become more and more familiar with email you'll understand why it is so popular. Because of its widespread use you'll probably soon find yourself swamped with emails. As a

consequence of this, you'll need to adopt some sound techniques for managing the influx of electronic mail. Below are some techniques for managing your email more effectively.

Create A Hierarchy Of Folders And Name Them Sensibly

In many ways your Inbox is a little like your hard disk – and just like the files on your hard disk you can create and name folders to help manage your emails more effectively. Personal folders can be created below almost any folder in Outlook, however, the most logical place is under your Inbox.

You should create a logical sequence of folders and name them so that you can use them quickly to locate an email that you may need to reference in the future. For example, if you purchase goods online over the Internet most suppliers will send you an electronic receipt via email. It is a good idea to place these email receipts in a special *Receipts* folder so that you can refer to them at any point without having to search your entire Inbox.

Move Messages Out Of The Inbox

Once you've created a hierarchy of folders, get into the habit of moving messages that you wish to retain out of the Inbox and into the relevant folder you've set up. Keeping the Inbox squeaky clean is akin to working with a tidy desk.

This will help you to quickly see new incoming messages. Also, by moving the emails for follow-up into more meaningful folders you are less likely to accidentally delete them while cleaning up your Inbox.

If you regularly move emails to specific folders, the quickest method for performing this function is to set up and use **quick steps**. Using a quick step, you can perform multiple tasks on the selected message with just a single click.

Delete Email You Don't Require Immediately

If you get an email and don't need it, get rid of it. You can do this permanently and instantly by selecting the message, holding down **Shift** and pressing **Del**. If you think you don't need a message, delete it into the **Deleted Items** folder (you can do this by pressing **Del** or clicking on **Delete**). Since the **Deleted Items** folder is a temporary location at least if you do find you need a deleted message later, you can recover it again.

Periodically, purge the **Deleted Items** folder to free up system resources and keep your email manageable.

Use Contact Groups

If you email the same message to a number of people on a regular basis, set up **contact groups** in Outlook Contacts. A contact group is simply a group of email addresses that you choose from existing Contacts. Outlook then allows you to save this list as a single entry in Contacts. When you need to send these people an email you simply click on the Group name rather than having to select each address individually.

There are virtually no limits to the number of contact groups that you can have in Outlook and they provide a great way to manage your outgoing email messages.

Utilise Conversation View

Conversation view groups all messages with the same subject and then displays only the latest message in the message list. You can expand a conversation to see all messages as necessary. To turn on **Conversation view**, tick **Show as Conversations** on the **VIEW** tab.

In **Conversation view**, you can use **Clean Up Conversation/Folder** to delete all redundant messages in a conversation – that is, all messages other than the most recent one except for messages that have not been read, are flagged, are categorised, or include attachments.

You can also use **Ignore Conversation** to delete all messages in a conversation that is no longer relevant, plus any future replies you may receive for the same conversation. If you change your mind later, you can reverse the process.

RECALLING A SENT MESSAGE

Imagine sending a message and realising that some of the information is wrong or that you forgot to attach the file that you've referred to in the message. If both you and the recipient of your

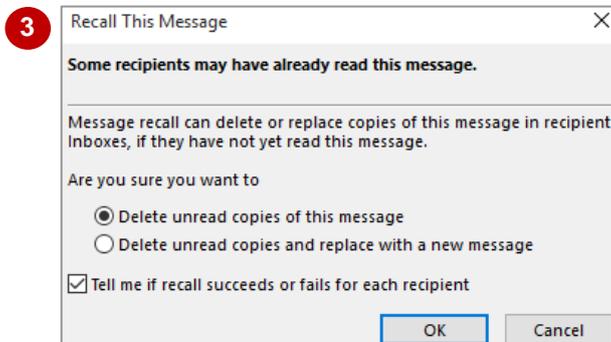
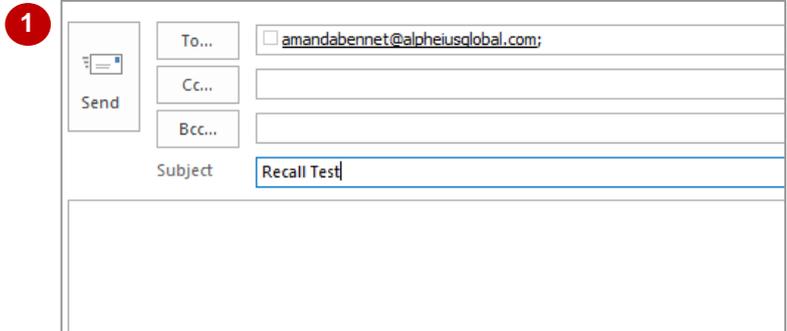
message use Microsoft Exchange Server, you can recall the message. Exactly how successful the recall will be will depend on whether or not the recipient has opened the message.

Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file Outlook_19.pst...

- 1 Create a new message with the subject **Recall Test** and send it to a colleague
- 2 In the **Folder** pane click on **Sent Items**, then double-click on the message you sent in step 1 in the message list
- 3 Click on **Actions** in the **Move** group and select **Recall This Message** to open the **Recall This Message** dialog box
- 4 Ensure that **Delete unread copies of this message** and **Tell me if recall succeeds or fails for each recipient** are selected, then click on **[OK]**
- 5 Close the message
If the recipient hasn't opened your message, Outlook will delete it and you will receive a Message Recall Success notification.
If the recipient has opened your message, the recall will fail and you will receive a Message Recall Failure notification...
- 6 After a few minutes, in the **Folder** pane, click on **Inbox** to see the **Message Recall** notification in the message list



For Your Reference...

To **recall** a **sent message**:

1. Click on **Sent Items** in the **Folder** pane and double-click on the message
2. Click on **Actions** in the **Move** group and select **Recall This Message**
3. Select the desired options, then click on **[OK]**

Handy to Know...

- Most home and personal accounts do not use Microsoft Exchange. So for example, if you have sent an email to someone's personal internet service provider (ISP) POP3 email account, you will not be able to recall the sent email message.

PRINTING A MESSAGE

Even though the whole idea of electronic mail messaging is to avoid or at best minimise paper usage, there will be times when you want or need to print an email message. You can print a

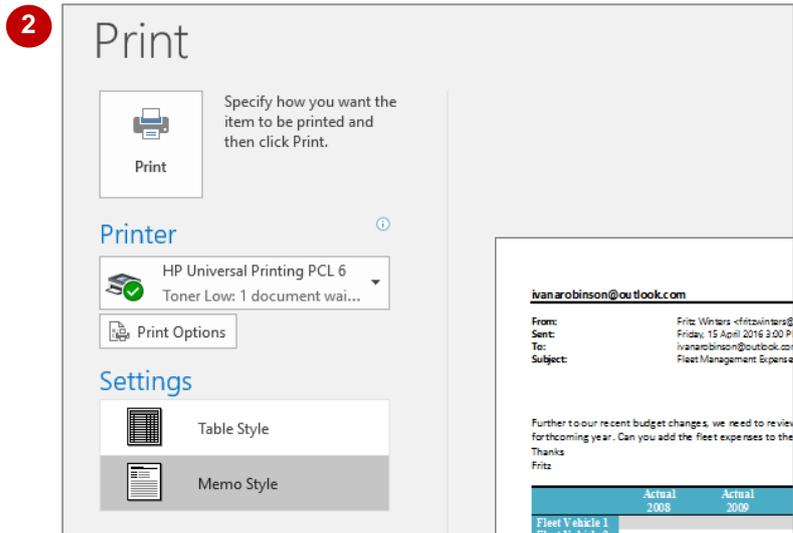
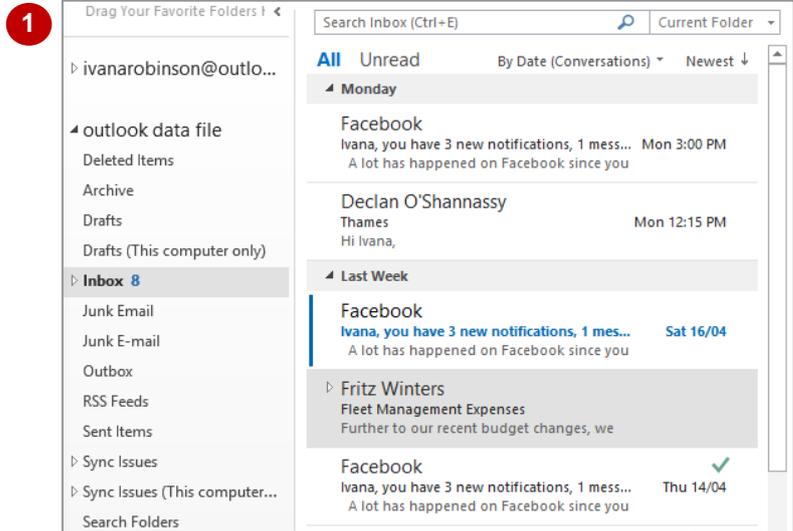
message from any of the Mail folders or directly from an open message using the **Backstage**. You can also preview the message in the **Backstage** before printing it.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 In the message list click on the **Fritz Winters** message with the **Fleet Management Expenses** subject
 - 2 Click on the **File** tab, then click on **Print** to display the print settings
 - 3 Select the desired **Printer** and ensure that **Memo Style** is selected under **Settings**
- Notice that the message will print in a style similar to a memo...
- 4 Click on **[Print]** to print the message or press **[Esc]** to return to the Inbox



For Your Reference...

To **print a message** from a **message list** or an **open message**:

1. Click on the **File** tab, then click on **Print**
2. Select **Memo Style** in **Settings**
3. Click on **[Print]**

Handy to Know...

- You can print the attachments in your message by clicking on **[Print Options]** in the **Backstage** to open the **Print** dialog box and then ticking **Print attached files**.
- You can click on **[Define Styles]** in the **Print** dialog box to edit or create new **Print styles**.

PRINTING A MESSAGE LIST

There may be times when you want a hard copy of the messages listed in one of your Mail folders or perhaps you might want to print a list of all messages that you've received from a particular

sender. To achieve this, you can either perform a search to display only the required messages in the message list or select the specific messages in the message list before accessing the **Backstage**.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 In the **Folder** pane click on **Inbox** to ensure that it is currently displayed

Let's print a list of all messages in the message list.

If you wanted to print specific messages, you could search for them by clicking in **Instant Search** and typing the desired criteria...

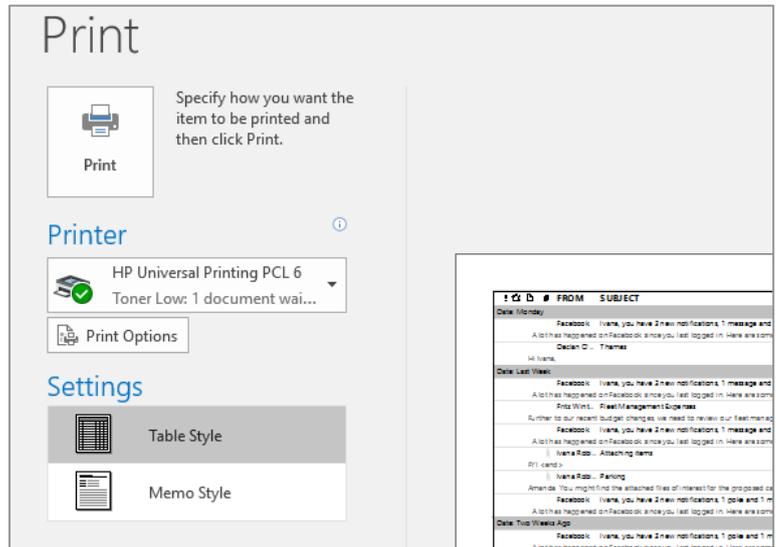
- 2 Click on the **File** tab, then click on **Print** to display the print settings

- 3 Click on **Table Style** under **Settings**

The preview shows that all of the messages included in the message list will be printed...

- 4 Click on **[Print]** to print the message list or press **[Esc]** to return to the Inbox

3



For Your Reference...

To **print a message list**:

1. Click on the **Inbox**
2. Select the desired view
3. Click on the **File** tab, then click on **Print**
4. Select **Table Style** under **Settings**
5. Click on **[Print]**

Handy to Know...

- You can print a list of selected messages in the current folder. To do this select the desired messages, click on the **File** tab, click on **Print** and select **Table Style** under **Settings**. Click on **[Print Options]**, select **Only selected rows** under **Print range** and then click on **[OK]**. Click on **[Print]**.

MESSAGE FORMATS

Not all email applications are alike so you need to use a message format that your recipient's application supports. Outlook supports three formats. The format you choose will determine

what your message can contain – bold fonts or being able to add pictures in the message body etc. If a recipient's mail application supports the format, they will see the message just as you created it.

HTML (Hypertext Markup Language)

HTML is the default message format used by Outlook. It is also the best format to use when you want to create messages that are similar to documents that you can produce in Microsoft Word. For example, you can include various fonts, colours, bullet lists and tables using HTML format.

By default, when you select either HTML or RTF (both of these options allow you to format message text), the message will be sent in HTML format. Thus, at least when you use HTML, you know that what you send is what the recipient will see – as long as their mail application supports HTML.

Plain Text

The **Plain Text** format is supported by all email applications. Plain text doesn't support features such as bold, italic, colours, fonts, or other text formatting. It also doesn't support pictures that are displayed directly in the message body, although you can include pictures as attachments.

If you have security concerns about reading HTML-formatted messages, you can set Outlook to open all messages in plain text format. (To do this, select **File > Options > Trust Centre > Trust Centre Settings > E-mail Security** and tick **Read all standard mail in plain text** under **Read as Plain Text**.) Be aware, however, that reading messages in plain text does not provide full protection against all email hazards.

Outlook Rich Text Format (RTF)

Outlook RTF is a Microsoft format that only the following email applications support:

- Microsoft Exchange Client versions 4.0 and 5.0
- Microsoft Outlook 2016
- Microsoft Office Outlook 2003 and 2007
- Microsoft Outlook 97, 98, 2000 and 2002

You can use RTF when sending messages within an organisation that uses Microsoft Exchange Server; however, it is still recommended that you use HTML format.

RTF supports text formatting, including bullets, alignment and linked objects. By default, Outlook automatically converts RTF-formatted messages to HTML when you send them to an internet recipient so that the message formatting is maintained and attachments will be received. Outlook also automatically formats meeting and task requests and messages with voting buttons so that these items can be sent intact across the internet to other Outlook users, regardless of the default format of the message. If an internet-bound message is a task or meeting request, Outlook will automatically convert it to internet Calendar format, a common format for internet calendar items, so that other email applications can support it.

CHANGING THE MESSAGE FORMAT

HTML is the default message format used to create messages in Outlook. But you don't have to use HTML message format. For example, if you want to create a new message for a recipient

who uses a very basic internet mail application, creating the message using plain text format would be more appropriate than the default HTML format.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

1 Create a new message and enter your own email address in **To**

2 Type the following in **Subject**:

This is a plain text message

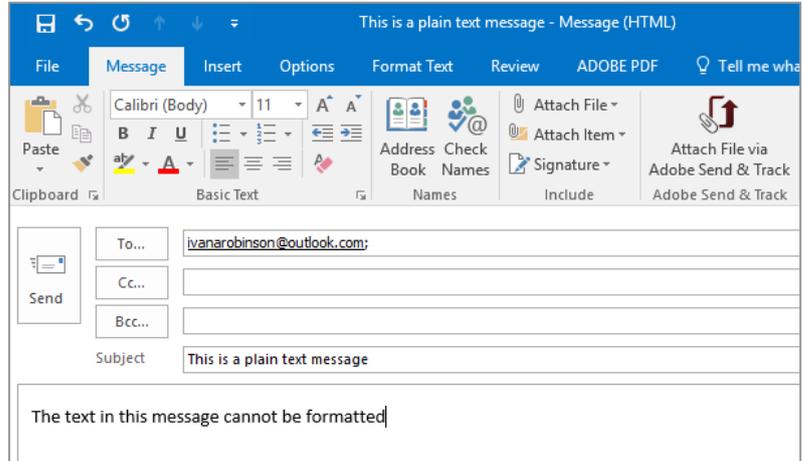
3 Type the following in the body of the message:

The text in this message cannot be formatted

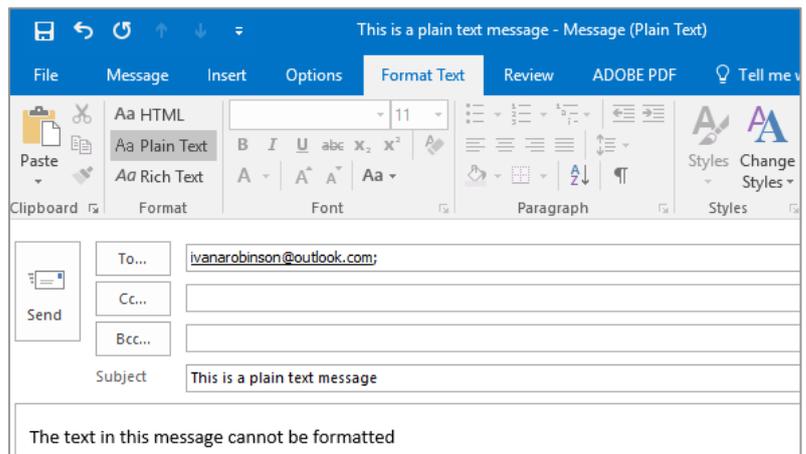
4 Click on the **Format Text** tab, then click on **Plain Text** in the **Format** group

Notice that the tools in the **Font**, **Paragraph** and **Styles** groups are greyed out, indicating that they're not available. The tools in the **Themes** group of the **Options** tab are also unavailable...

5 Send the message



3



4

For Your Reference...

To **change** the **format** for a **single message**:

1. Create a new message
2. Click on **Plain Text** in the **Format** group on the **Format Text** tab
3. Enter the text
4. Send the message

Handy to Know...

- You can change the message format for all messages in the **Backstage**. Click on the **File** tab, click on **Options**, then click on **Mail** to display the mail options. Click on the drop arrow for **Compose messages in this format** under **Compose messages**, select the desired format and click on **[OK]**.

CHOOSING THEMES OR STATIONERY

Outlook lets you compose new messages with special backgrounds known as **stationery**. This is similar to writing messages on letterhead or special note paper. **Themes** are a collection of

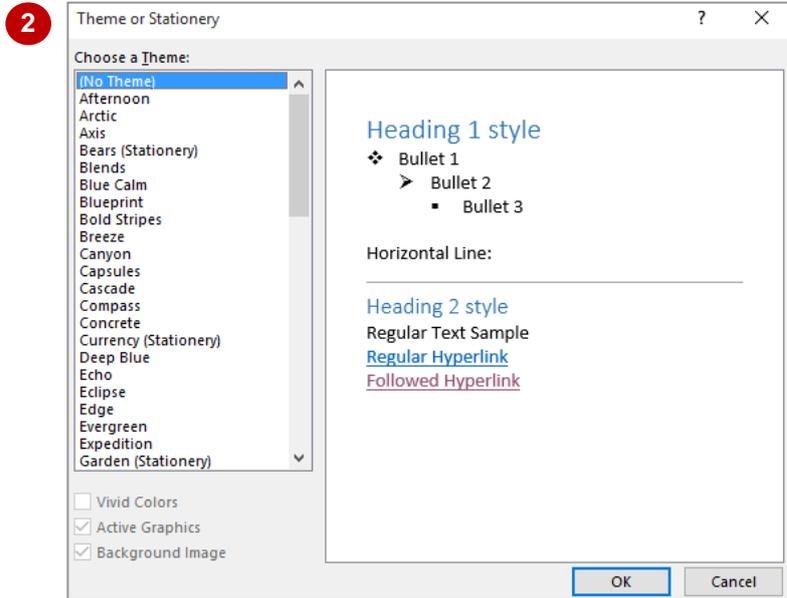
design elements, including background effects, fonts, text and graphics that provide a theme to your message. For example, the **winter** theme will give the impression of coldness to your messages.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 Click on the **File** tab, click on **Options**, then click on **Mail** to display the mail options
- 2 Click on **[Stationery and Fonts]** to open the **Signatures and Stationery** dialog box, then click on **[Theme]** to open the **Theme or Stationery** dialog box
- 3 Click on the various **theme** and **stationery** options under **Choose a theme** and watch how the preview changes
- 4 Click on **Hand Prints (Stationery)**, then click on **[OK]** three times to return to the Inbox
- 5 Create a new message, address it to yourself and type **Could everyone please keep the kitchen clean and tidy. Our health is in our hands!**
- 6 Type **Kitchen** in Subject, then send the message



For Your Reference...

To **choose** a **stationery/theme** for **all messages**:

1. Click on the **File** tab, click on **[Options]** then click on **Mail**
2. Click on **[Stationery and Fonts]**, then click on **[Theme]**
3. Select the desired option
4. Click on **[OK]** three times

Handy to Know...

- The format and styles used in some **stationery** and **theme** options can be a little overwhelming. Choose subtle options, such as ones with a picture or image down the side, or ones with a very subdued background pattern, rather than very busy or overstated designs.

APPLYING A THEME OR STATIONERY TO A MESSAGE

As you create a new message, you can choose to apply a particular **theme** or **stationery** option to it. This gives you the flexibility to pick a design that best suits the proposed contents of your

email message. Be careful not to overuse this feature – your recipients may become overwhelmed!

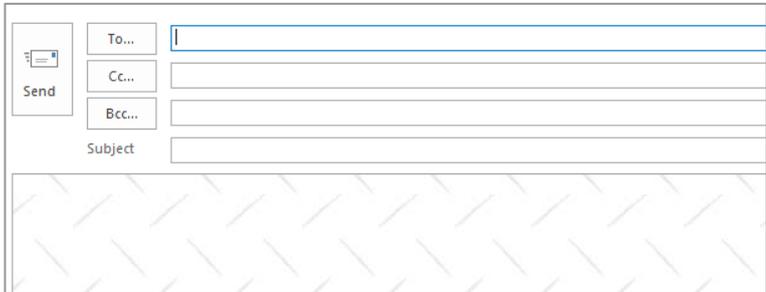
Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 Click on **New Items** in the **New** group, point to **E-mail Message Using**, then select **More Stationery** to open the **Theme or Stationery** dialog box
- 2 Scroll down to and click on **Industrial**, then click on **[OK]** to open a new message with the theme applied
- 3 Address the message to yourself, then type a subject and message
- 4 Send the message

2



3



For Your Reference...

To **apply** a **theme/stationery** to a **single message**:

1. Click on **New Items**, then select **New E-mail Message Using > More Stationery**
2. Select the desired **theme** or **stationery**, then click on **[OK]**
3. Compose and send the message

Handy to Know...

- Once you have used a particular theme or stationery option in a new message by clicking on **New Items** and then selecting **E-mail Message Using > More Stationery**, the theme or stationery option will appear at the top of the **E-mail Message Using** submenu.

TURNING THEMES OR STATIONERY OFF

If you have selected to use a particular theme or stationery option for all messages, you can quickly turn off this feature if desired. Perhaps you may be tired of the look and feel of your

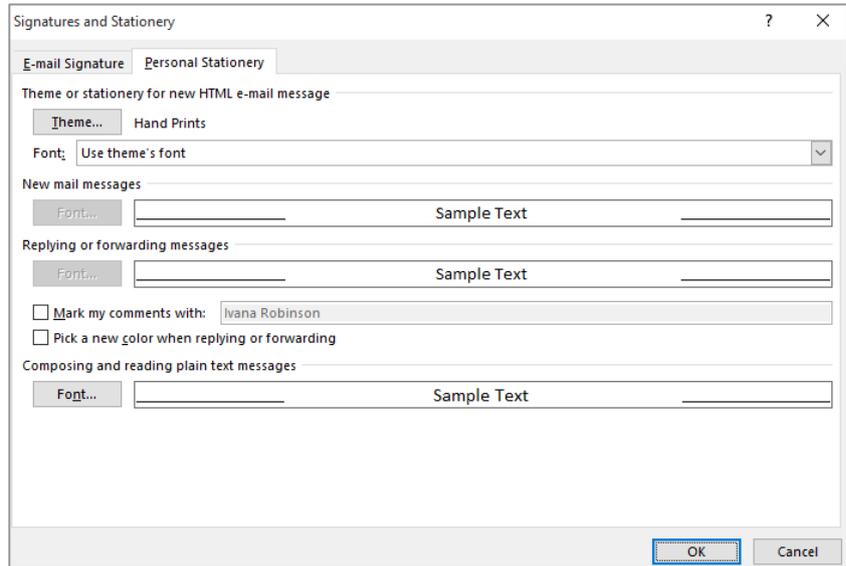
messages and simply want to revert to the plain and simple default look. By selecting the default **no theme** option, you can always choose to apply a theme or stationery to specific messages only.

Try This Yourself:

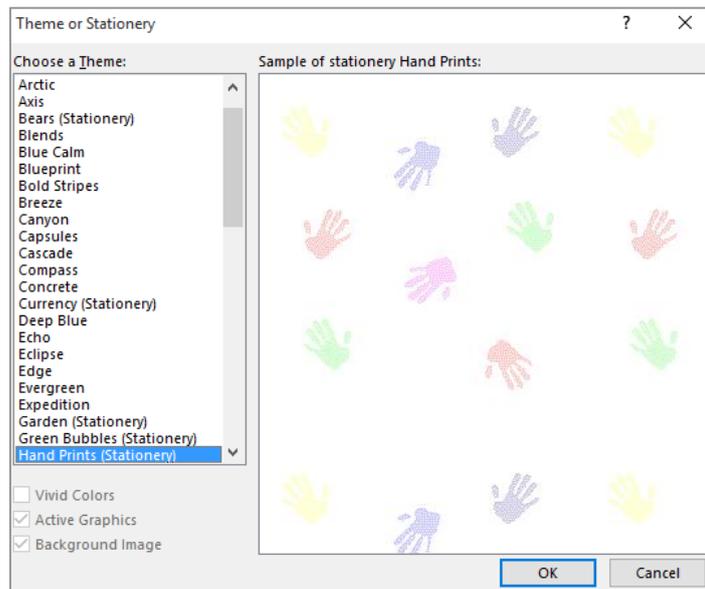
Same File

Continue using the previous file with this exercise...

- 1 Click on the **File** tab, click on **[Options]**, then click on **Mail** to display the mail options
- 2 Click on **[Stationery and Fonts]** to open the **Signatures and Stationery** dialog box
- 3 Click on **[Theme]** to open the **Theme or Stationery** dialog box
- 4 Click on **(No Theme)** under **Choose a Theme**, then click on **[OK]** three times to return to the Inbox



- 2
- 3



For Your Reference...

To **turn off themes** or **stationery**:

1. Click on the **File** tab, click on **[Options]**, and then click on **Mail**
2. Click on **[Stationery and Fonts]**
3. Click on **[Theme]** and select **(No Theme)**
4. Click on **[OK]** three times

Handy to Know...

- If you don't want to receive messages with a theme or stationery applied, you can choose to display all open messages in plain text. This will also remove all formatting from the message. To do this, select **File > Options > Trust Centre > Trust Centre Settings > E-mail Security**.

APPLYING A THEME

A **theme** is a set of unified design elements and colour schemes that you can use to create professional-looking messages. When you apply a theme to a message, Outlook customises the

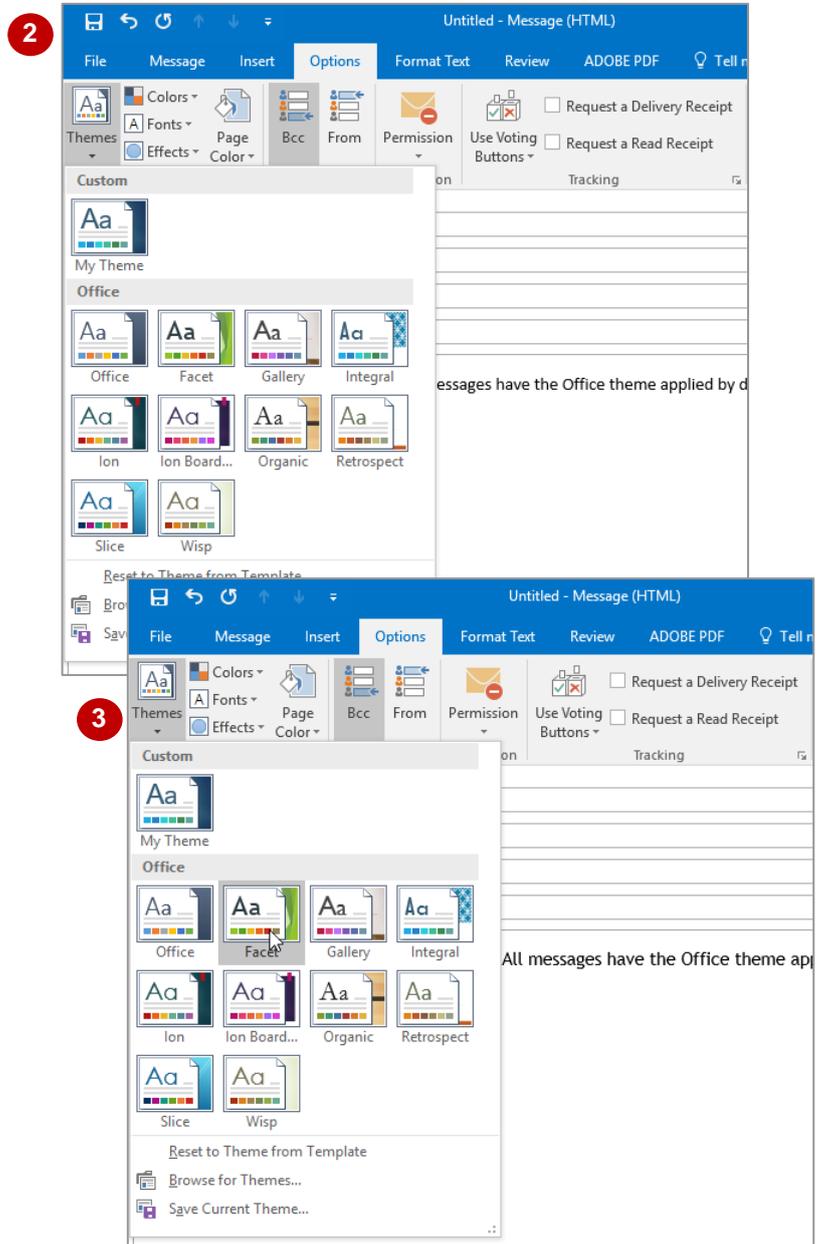
background colours and graphics, body and heading styles, lists, horizontal lines, hyperlink colours and table border colours.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 Create a new message, address it to yourself, then type **This message is looking at different themes. All messages have the Office theme applied by default.**
- 2 Click on the **Options** tab, then click on **Themes** in the **Themes** group to open the **Themes** gallery
The default Office theme is currently applied to this message – notice that it is highlighted in grey. Look at the message and take note of the fonts and colours used with this theme...
- 3 Point to the various themes in the gallery to see them applied temporarily to the message in Live Preview
The Facet theme has been applied temporarily in this example. Notice that the fonts used in the text and the size and colour of the fonts vary with the different themes...
- 4 Select the desired theme, type **Test** in **Subject**, then send the message



For Your Reference...

To **apply** a **theme** to a **message**:

1. Create the message
2. Click on the **Options** tab, then click on **Themes** in the **Themes** group
3. Click on the desired theme
4. Send the message

Handy to Know...

- You can only apply a theme to a message that has been created using the default HTML message format.
- You can see which theme is applied to a message by hovering over **Themes**. The theme name will appear in the tooltip.

SAVING A MESSAGE DRAFT

Sometimes it can take time to create an email message. Perhaps you are struggling for just the right words or you are waiting for additional information from another source – whatever the

case, if you do not wish to complete and send an email message you can save it as a draft. Saved messages are placed in the **Drafts** folder from which they can be opened and worked upon later.

Try This Yourself:

Same
File

Continue using the previous file with this exercise...

- 1 Create a new mail message and type **New Ordering Procedure** in **Subject**
- 2 Type the following text in the body of the message
All new orders must be processed by Jo Daly. Her contact number is:
- 3 Click on the **File** tab, then click on **[Save]** to save the message
- 4 Click on the **Drafts** folder for your personal email account to see that the message has been saved in this folder

1

2

3

For Your Reference...

To **save** a **message** as a **draft**.

1. Compose the message
2. Click on the **File** tab, then click on **Save**

Handy to Know...

- You can save a message in a folder other than the **Drafts** folder by clicking on **Save Sent Items To** in the **More Options** group on the **Options** tab and selecting **Other Folder**.

USING A SAVED MESSAGE

Messages that have been saved in the **Drafts** folder can be opened so that you can continue working on them. Draft messages are opened in the same way as opening any other messages –

typically this is done by double-clicking on the message.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

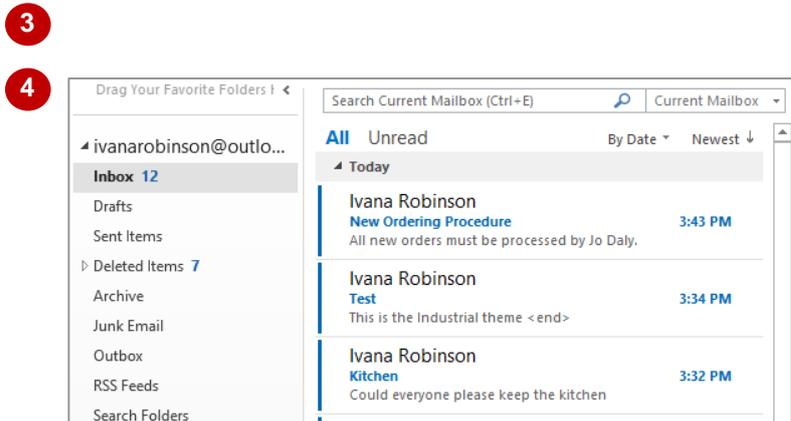
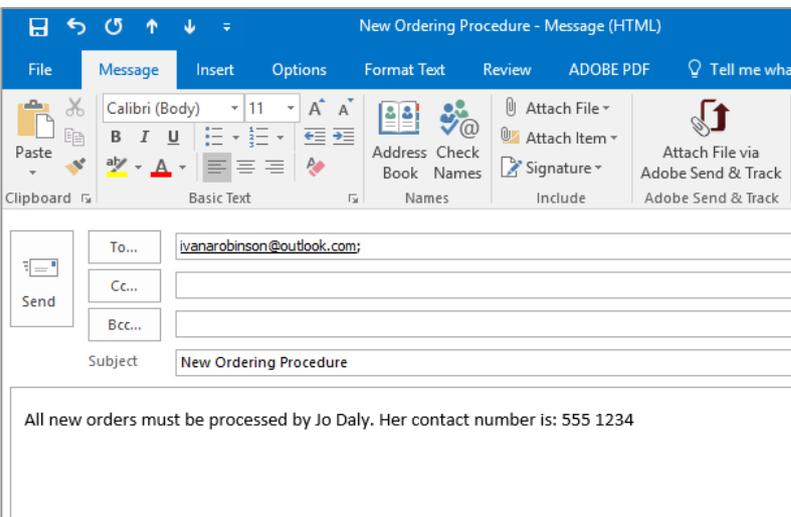
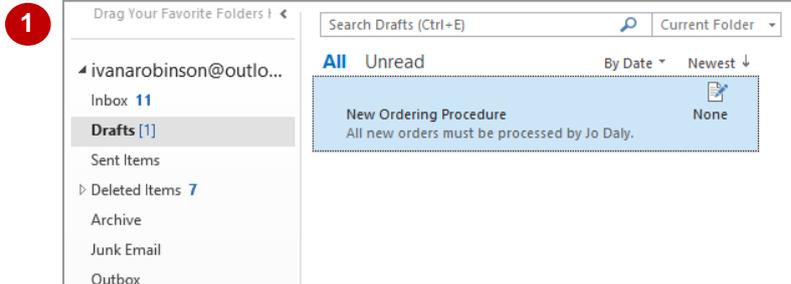
- 1 Ensure that the **Drafts** folder for your personal email account is open

The *New Ordering Procedure* message should be listed...

- 2 Double-click on the **New ordering procedure** message to open it in a message window

- 3 Complete the message by addressing it to yourself, typing colon (:), then typing **555 1234**, and send the message

- 4 Click on the **Inbox** to check that your new message has arrived



For Your Reference...

To **use** a **saved message**:

1. Click on **Drafts**
2. Double-click on the saved message
3. Complete and send the message

Handy to Know...

- You can save the message as often as you like. If you have no need to retain a saved message you can delete it from the **Drafts** folder.

SENDING A VOTING MESSAGE

Messages are sometimes sent to solicit some sort of answer or response. For example, you might send a message asking whether or not your colleagues can attend a function. Outlook

allows you to add **voting buttons** to a message. When the recipient receives the message they can simply click on the desired voting button and a reply will be automatically generated.

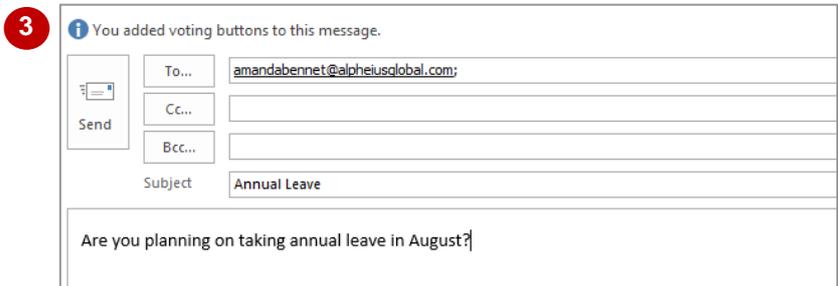
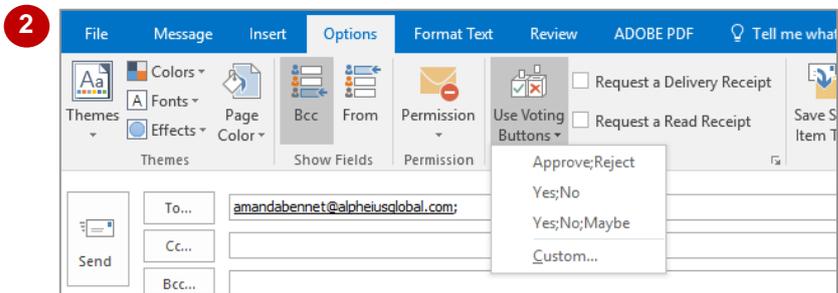
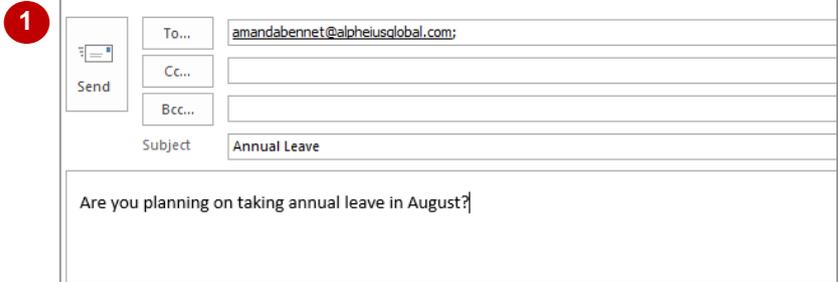
Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 Create a new email, address it to a colleague, type **Annual Leave** in **Subject**, and type **Are you planning on taking annual leave in August?** in the message body
- 2 Click on the **Options** tab, then click on **Use Voting Buttons** in the **Tracking** group to display the voting button options
- 3 Select **Yes;No** and then send the message

The Yes;No voting option will allow the recipients to reply either with a positive response, by voting Yes, or with a negative response, by voting No



For Your Reference...

To **send a voting message**:

1. Compose the message
2. Click on **Use Voting Buttons** in the **Tracking** group on the **Options** tab
3. Select the desired option
4. Send the message

Handy to Know...

- Outlook offers three sets of voting button options plus the ability to create your own custom voting button names. For example, you might create the custom voting buttons **Monday;Tuesday;Wednesday** to find out which of the three days best suits your colleagues for weekly staff meetings.

RESPONDING TO A VOTING MESSAGE

When someone sends you a message with **voting buttons** you are presented with several buttons to indicate how you wish to respond to the request from the sender. Outlook lets you

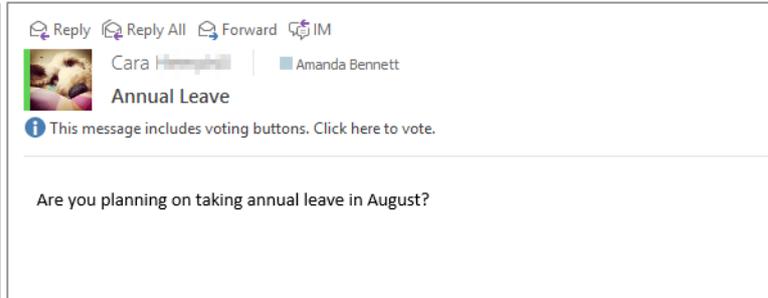
respond to it directly using the voting buttons in the **InfoBar** in the **Reading** pane or you can open the message and select the desired option on the **Vote** tool in the ribbon.

Try This Yourself:

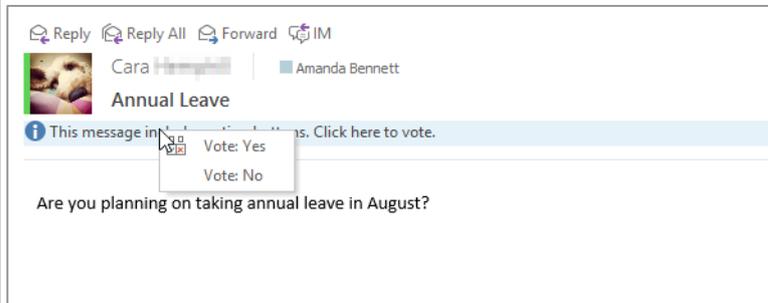
Same File

Continue using the previous file with this exercise and ensure someone has sent you the voting message from the previous exercise...

- 1 Click on **Inbox** to see the voting message
Notice that the information 'Click here to vote' appears in the InfoBar in the message header in the Reading pane...
- 2 Click on the text **Click here to vote** to display the voting buttons
- 3 Click on **Vote: Yes**
A dialog box listing the two response options will display...
- 4 Ensure that **Send the response now** is selected, then click on **[OK]**
The InfoBar will indicate that you have responded to this voting message

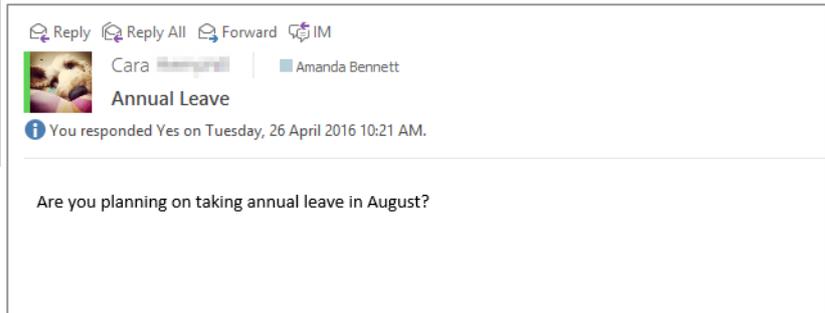
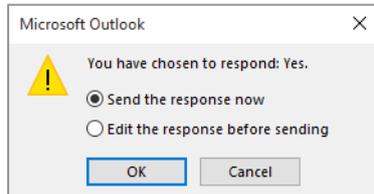


1



2

3



4

For Your Reference...

To **respond** to a **voting message**:

1. Click on the **InfoBar** in the Reading pane
2. Select the desired voting option
3. Select **Send the response now** or **Edit the response before sending**
4. Click on **[OK]**

Handy to Know...

- As well as responding to a voting message by simply selecting the desired voting option, you can include a note for the sender along with your vote in the response message. To do this, select the voting option, click on **Edit the response before sending**, click on **[OK]**, and then type and send the message.

TRACKING VOTING RESPONSES

As soon as one recipient has responded to your voting message, Outlook will automatically tabulate the results. To see the results you simply open the original message you sent with the

voting buttons – this message is usually found in the **Sent Items** folder – and then turn on the **Tracking** feature. If desired, you can also export the poll results to Excel for further manipulation.

Try This Yourself:

Continue using the previous file with this exercise...

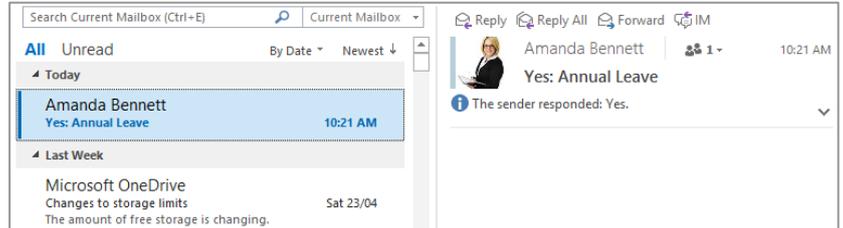
- 1 Click on **Inbox** – you should have received a message with the subject **Yes: Annual Leave**

Looking at messages in the Inbox to check the recipients' responses is fine if you'd only sent the message to a few people. But if you sent it to more, it is easier to see a summary of the responses using the Tracking feature...

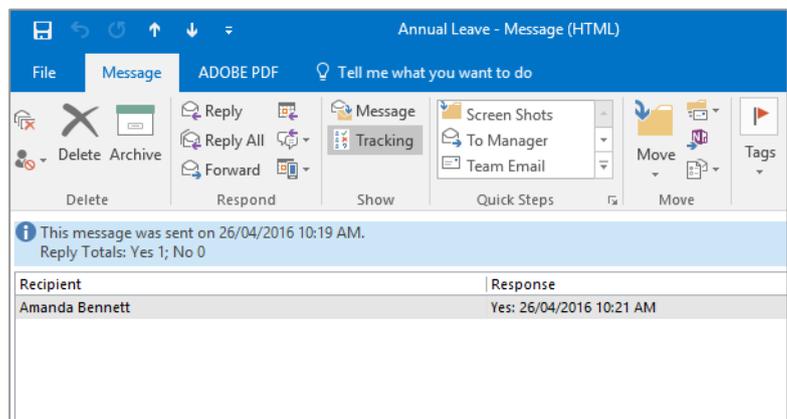
- 2 Click on **Sent Items** and then double-click on the **Annual Leave** message to open it in a message window

The message should appear in Sent Items with the symbol indicating that the Tracking feature has been enabled...

- 3 Click on **Tracking** in the **Show** group to display a summary of the responses to your vote
- 4 Press **Esc** to close the message



1



3

For Your Reference...

To **review** the **voting responses**:

1. Click on **Sent Items**
2. Double-click on the original voting message
3. Click on **Tracking** in the **Show** group

Handy to Know...

- You can export poll responses to Excel. To do this, open the original message with the voting buttons and click on **Tracking** in the **Show** group. Select the desired rows, press **Ctrl** + **C**, open Excel, click in a cell and press **Ctrl** + **V** to paste the data.

SENDING AUTOMATIC RESPONSES

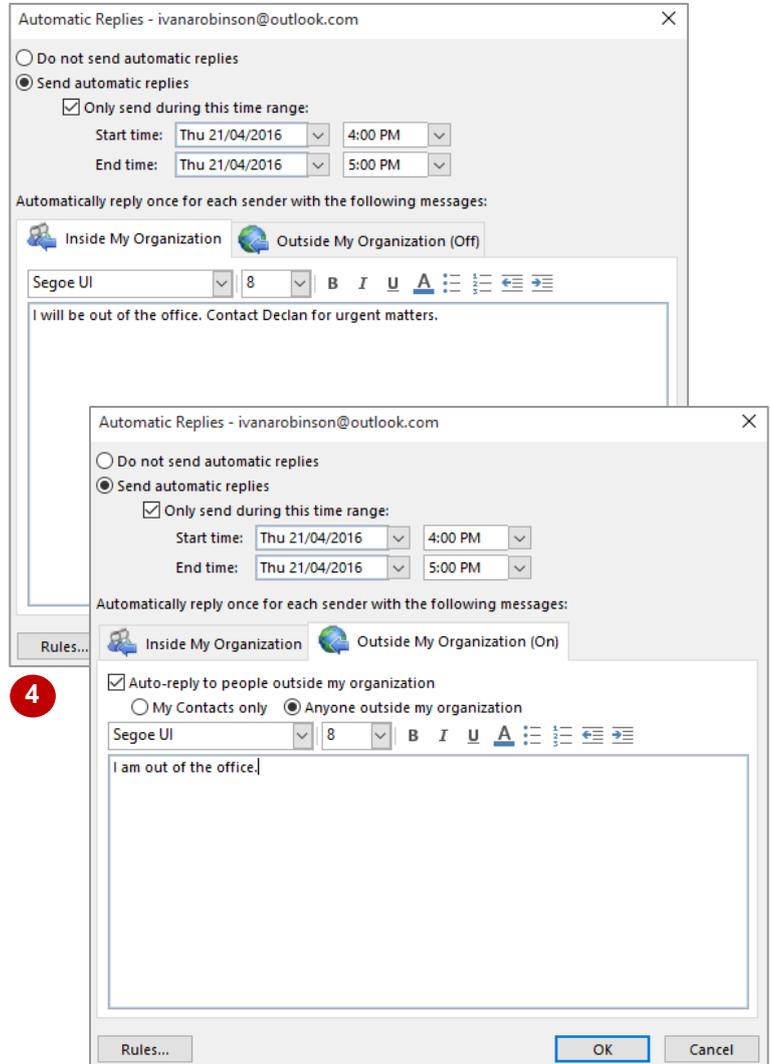
You can set up Outlook to automatically respond to people who send you messages. This is ideal when you are out of your office for some time, such as being away on annual leave. Using the

Automatic Reply feature you could inform people the dates of when you're away, provide an alternative contact or simply suggest that there may be a delay before you respond. It's your choice.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Click on the **File** tab, then click on **[Automatic Replies]** to open the **Automatic Replies** dialog box
- 2 Click on **Send automatic replies**
- 3 Tick **Only send during this time range** and select a period from the current time to one hour from now
- 4 Type in the message body **I will be out of the office. Contact Declan for urgent matters**
- 5 Click on the **Outside My Organisation** tab, then ensure to select **Auto-reply to people outside my organisation** and **Anyone outside my organisation**
- 6 Type **I am out of the office** in the text box, as shown, then click on **[OK]**
- 7 Click on the **Back** arrow, then create and send a message to yourself
- 8 Click in the **Inbox** to see the automatic response
- 9 Click on **[Turn Off]** in the yellow Infobar to turn off **Automatic replies**



For Your Reference...

To **set up** an **automatic response message**:

1. Click on the **File** tab, then click on **[Automatic Replies]**
2. Click on **Send automatic replies** and specify a timeframe
3. Type the text for internal and external messages

Handy to Know...

- You must have a Microsoft Exchange Server account for automatic replies to work.
- Outlook will respond only once for each sender.

NOTES:





Congratulations!

You have now completed Microsoft Outlook 2016 - Essentials. Microsoft Outlook 2016 - Essentials was designed to get you to the point where you can competently perform a variety of operations.

We have tried to build up your skills and knowledge by having you work through specific tasks. The step by step approach will serve as a reference for you when you need to repeat a task.

Where To From Here?

The following is a little advice about what to do next:

- Spend some time playing with what you have learnt. You should reinforce the skills that you have acquired and use some of the application's commands. This will test just how much of the concepts and features have stuck! Don't try a big task just yet if you can avoid it - small is a good way to start.
- Some aspects of the course may now be a little vague. Go over some of the points that you may be unclear about. Use the examples and exercises in these notes and have another go - these step-by-step notes were designed to help you in the classroom and in the work place!

Here are a few techniques and strategies that we've found handy for learning more about technology:

- read computer magazines - there are often useful articles about specific techniques
- if you have the skills and facilities browse the Internet, specifically the technical pages of the application that you have just learnt
- take an interest in what your work colleagues have done and how they did it - we don't suggest that you plagiarise but you can certainly learn from the techniques of others
- if your software came with a manual (which is rare nowadays) spend a bit of time each day reading a few pages. Then try the techniques out straight away - over a period of time you'll learn a lot this way
- and of course, there are also more courses and books for you to work through.

Hungry for More?

We live in an ever-changing world where we all need to review and upgrade our skills.

If you have received this course book on a training course why not ask the tutor or trainer for other courses that may be of benefit to you. If you are attending a college ask for one of their brochures.

Alternatively, if you've enjoyed using this course book you can find others that cover a wide range of topics at our web site www.watsoniapublishing.com.

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