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Step by Step



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Outlook® 2010

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Joan Lambert and Joyce Cox

Microsoft®

Microsoft® Outlook® 2010

Step by Step

Joan Lambert
Joyce Cox

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Introducing Microsoft Outlook 2010

Bill Gates's dream of "a computer on every desktop" is becoming more and more of a reality—many people today work (and play) on computers both in the office and at home. But desktop computers are even becoming a thing of the past. Laptops, netbooks, and other portable computers, as well as Windows Mobile devices, smartphones, Windows Phones, BlackBerries, and iPhones are becoming standard communication platforms. Electronic messaging—whether by e-mail, instant messaging, or text messaging—keeps many of us in contact with colleagues, clients, friends, and family members for a dizzying portion of each day. For people who are dependent on electronic messages as a means of communicating, Microsoft Outlook 2010 offers an ideal solution. Outlook 2010 includes not only e-mail functionality, but also integrates with instant messaging programs and SMS text messaging service providers. Outlook enables you to manage messaging and information—address books, calendars, task lists, note pads, and more—in one attractive interface. More importantly, Outlook makes this information immediately available to you when and where you need it. From one place, you can quickly store, organize, manage, and retrieve many types of information. You can use Outlook to:

- Send, receive, organize, and archive e-mail messages.
- Create attractive business graphics and incorporate and edit external images in your communications.
- Send documents, spreadsheets, graphics, and other files as message attachments, and preview attachments you receive from other people.
- Schedule events, appointments, and meetings, invite attendees, and reserve conference rooms, projectors, and other managed resources.
- View upcoming appointments and tasks, and receive reminders for them.
- Store contact information in a transferable and easily accessible format.
- Track tasks for yourself or for someone else, and schedule time to complete your tasks.
- Store random bits of information as notes.

- Share schedule information with other people, inside and outside your organization.
- Track the interactions you have with other people.
- Organize and easily locate information in messages, attachments, calendars, contacts, and tasks.
- Filter out unwanted and annoying junk messages.
- Have information from favorite Web sites delivered directly to you.

In an enterprise environment, Outlook 2010 interacts with Microsoft server products to provide unified communications services including real-time presence and status information, specialized functionality for internal messaging, access to facsimile messages and voicemail messages, offline access to SharePoint site content, and many other useful features.

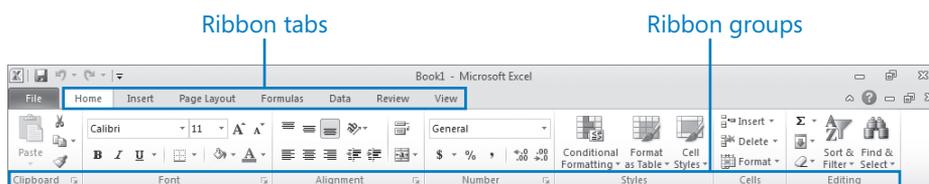
Significant changes have been made from previous versions of Outlook. If you're upgrading from Outlook 2007 or Outlook 2003, you might find that some of the changes take a bit of getting used to—particularly the global incorporation of Office 2010 interface elements such as the ribbon and the Quick Access Toolbar, and the new Backstage view. These elements have been carefully designed to provide intuitive access to tools and commands. In Outlook 2010 you can control the content displayed on the ribbon tabs and personalize your working environment in more ways than in previous versions of Outlook.

Let's Get Started!

To put it simply, Outlook 2010 is a truly excellent one-stop information management system. Managing messages, schedules, and information is easier than ever before. After using this program for only a short time, you might wonder how you ever did without it. Join us now for a close look at all the features and functions of Outlook 2010.

Modifying the Display of the Ribbon

The goal of the Microsoft Office 2010 working environment is to make working with Office files—including Microsoft Word documents, Excel workbooks, PowerPoint presentations, Outlook e-mail messages, and Access databases—as intuitive as possible. You work with an Office file and its contents by giving commands to the program in which the document is open. All Office 2010 programs organize commands on a horizontal bar called the *ribbon*, which appears across the top of each program window whether or not there is an active document.



A typical program window ribbon.

Commands are organized on task-specific tabs of the ribbon, and in feature-specific groups on each tab. Commands generally take the form of buttons and lists. Some appear in galleries. Some groups have related dialog boxes or task panes that contain additional commands.

Throughout this book, we discuss the commands and ribbon elements associated with the program feature being discussed. In this topic, we discuss the general appearance of the ribbon, things that affect its appearance, and ways of locating commands that aren't visible on compact views of the ribbon.

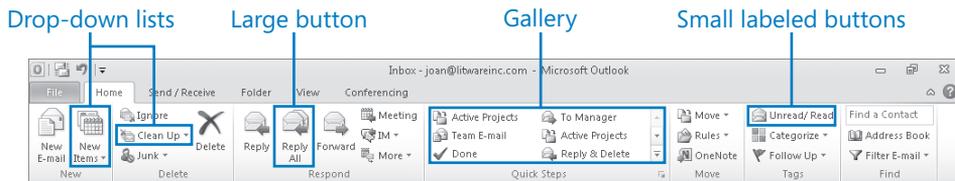
See Also For detailed information about the ribbon in Microsoft Outlook, see [“Working in the Outlook Program Window”](#) and [“Working with the Ribbon and the Backstage View”](#) in Chapter 2, [“Explore the Outlook Windows.”](#)

Tip Some older commands no longer appear on the ribbon, but are still available in the program. You can make these commands available by adding them to the Quick Access Toolbar. For more information, see [“Customizing the Quick Access Toolbar”](#) in Chapter 13, [“Customize Outlook.”](#)

Dynamic Ribbon Elements

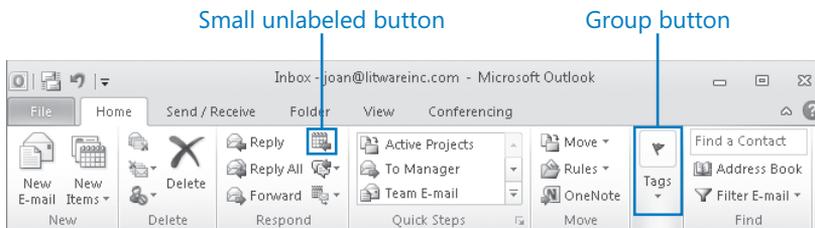
The ribbon is dynamic, meaning that the appearance of commands on the ribbon changes as the width of the ribbon changes. A command might be displayed on the ribbon in the form of a large button, a small button, a small labeled button, or a list entry. As the width of the ribbon decreases, the size, shape, and presence of buttons on the ribbon adapt to the available space.

For example, when sufficient horizontal space is available, the buttons on the Home tab of the Outlook program window are spread out and you're able to see more of the commands available in each group.



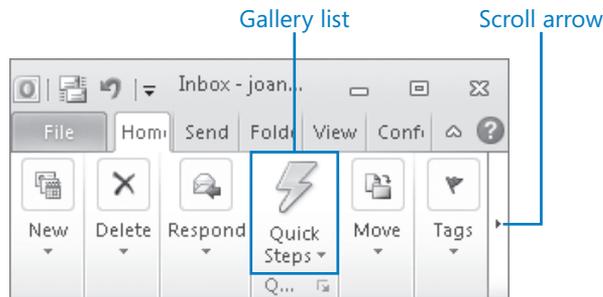
The Home tab of the Outlook program window at 1024 pixels wide.

If you decrease the width of the ribbon, small button labels disappear and entire groups of buttons are hidden under one button that represents the group. Click the group button to display a list of the commands available in that group.



The Home tab of the Outlook program window at 675 pixels wide.

When the window becomes too narrow to display all the groups, a scroll arrow appears at its right end. Click the scroll arrow to display hidden groups.



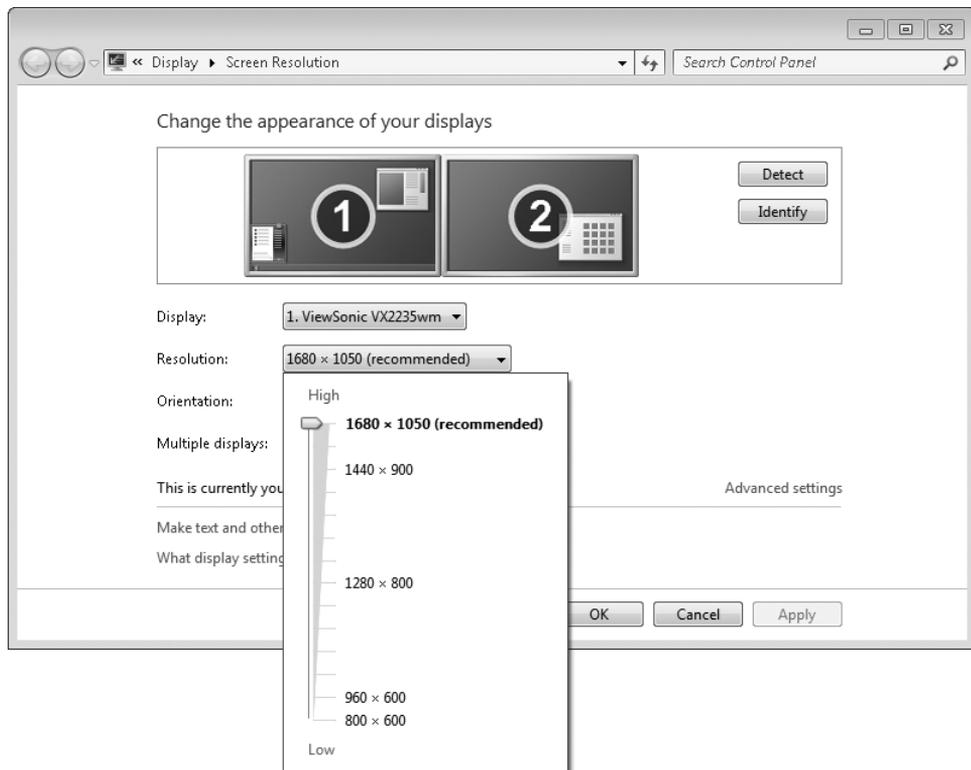
The Home tab of the Outlook program window at 340 pixels wide.

Changing the Width of the Ribbon

The width of the ribbon is dependent on the horizontal space available to it, which depends on these three factors:

- **The width of the program window** Maximizing the program window provides the most space for ribbon elements. You can resize the program window by clicking the button in its upper-right corner or by dragging the border of a non-maximized window.
- **Tip** On a computer running Windows 7, you can maximize the program window by dragging its title bar to the top of the screen.
- **Your screen resolution** Screen resolution is the size of your screen display expressed as pixels wide × pixels high. The greater the screen resolution, the greater the amount of information that will fit on one screen. Your screen resolution options are dependent on your monitor. At the time of writing, possible screen resolutions range from 800 × 600 to 2048 × 1152. In the case of the ribbon, the greater the number of pixels wide (the first number), the greater the number of buttons that can be shown on the ribbon, and the larger those buttons can be.

On a computer running Windows 7, you can change your screen resolution from the Screen Resolution window of Control Panel.

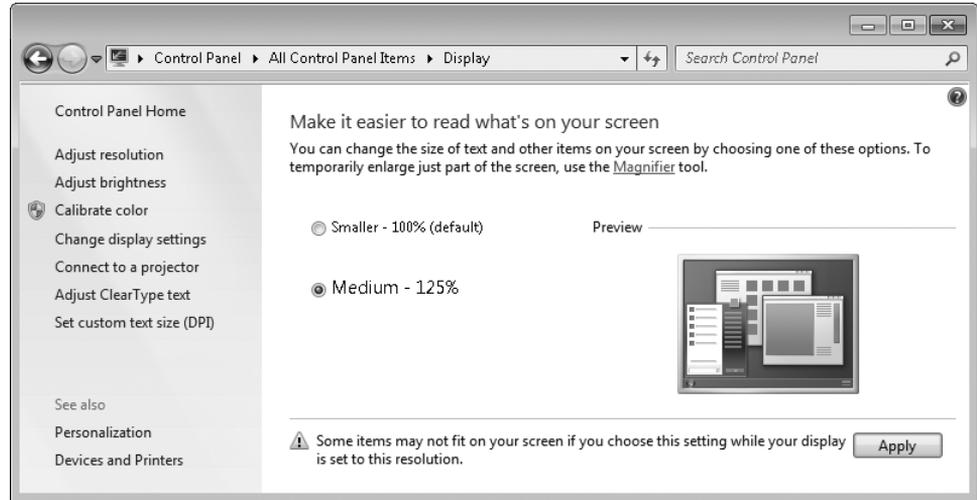


You set the resolution by dragging the pointer on the slider.

- **The density of your screen display** You might not be aware that you can change the magnification of everything that appears on your screen by changing the screen magnification setting in Windows. Setting your screen magnification to 125% makes text and user interface elements larger on screen. This increases the legibility of information, but means that less fits onto each screen.

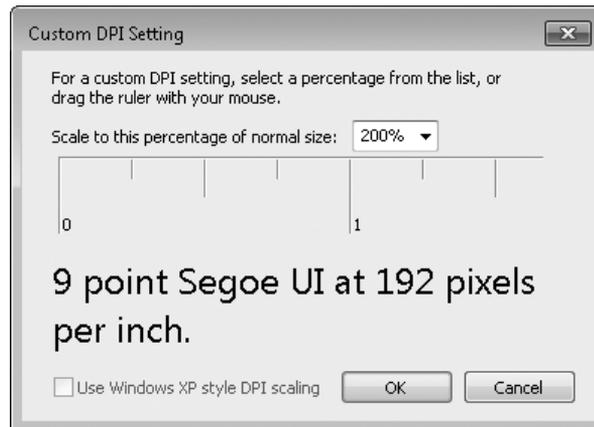
On a computer running Windows 7, you can change the screen magnification from the Display window of Control Panel.

See Also For more information about display settings, refer to *Windows 7 Step by Step* (Microsoft Press, 2009), *Windows Vista Step by Step* (Microsoft Press, 2006), or *Windows XP Step by Step* (Microsoft Press, 2002) by Joan Lambert Preppernau and Joyce Cox.



You can choose one of the standard display magnification options, or create another by setting a custom text size.

The screen magnification is directly related to the density of the text elements on screen, which is expressed in dots per inch (dpi) or points per inch (ppi). (The terms are interchangeable, and in fact are both used in the Windows dialog box in which you change the setting.) The greater the dpi, the larger the text and user interface elements appear on screen. By default, Windows displays text and screen elements at 96 dpi. Choosing the Medium - 125% display setting changes the dpi of text and screen elements to 120 dpi. You can choose a custom setting of up to 500% magnification, or 480 dpi, in the Custom DPI Setting dialog box.



You can choose a magnification of up to 200% from the lists, or choose a greater magnification by dragging across the ruler from left to right.

Adapting Exercise Steps

The full-screen images shown in the exercises in this book were captured at a screen resolution of 1024 x 768, at 100% magnification, and the default text size (96 dpi). If any of your settings are different, the ribbon on your screen might not look the same as the one shown in the book. For example, you might see more or fewer buttons in each of the groups, the buttons you see might be represented by larger or smaller icons than those shown, or the group might be represented by a button that you click to display the group's commands.

When we instruct you to give a command from the ribbon in an exercise, we do it in this format:

- On the **Insert** tab, in the **Illustrations** group, click the **Chart** button.

If the command is in a list, we give the instruction in this format:

- On the **Page Layout** tab, in the **Page Setup** group, click the **Breaks** button and then, in the list, click **Page**.

The first time we instruct you to click a specific button in each exercise, we display an image of the button in the page margin to the left of the exercise step.

If differences between your display settings and ours cause a button on your screen to look different from the one shown in the book, you can easily adapt the steps to locate the command. First, click the specified tab. Then locate the specified group. If a group has been collapsed into a group list or group button, click the list or button to display the group's commands. Finally, look for a button that features the same icon in a larger or smaller size than that shown in the book. If necessary, point to buttons in the group to display their names in ScreenTips.

If you prefer not to have to adapt the steps, set up your screen to match ours while you read and work through the exercises in the book.

Features and Conventions of This Book

This book has been designed to lead you step by step through all the tasks you're most likely to want to perform in Microsoft Outlook 2010. If you start at the beginning and work your way through all the exercises, you will gain enough proficiency to be able to manage information by using Outlook and to create and work with e-mail messages, calendar items, and contact records. However, each topic is self contained. If you have worked with a previous version of Outlook, or if you completed all the exercises and later need help remembering how to perform a procedure, the following features of this book will help you locate specific information:

- **Detailed table of contents** Scan the listing of the topics and sidebars within each chapter.
- **Chapter thumb tabs** Easily locate the beginning of the chapter by looking at the colored blocks on the odd-numbered pages.
- **Topic-specific running heads** Within a chapter, quickly locate a topic by looking at the running heads at the top of odd-numbered pages.
- **Glossary** Look up the meaning of a word or the definition of a concept.
- **Keyboard Shortcuts** If you prefer to work from the keyboard rather than with a mouse, find all the shortcuts in one place.
- **Detailed index** Look up specific tasks and features in the index, which has been carefully crafted with the reader in mind.

You can save time when reading this book by understanding how the *Step by Step* series shows exercise instructions, keys to press, buttons to click, and other information. The following table lists these conventions.

Convention	Meaning
SET UP	This paragraph preceding a step-by-step exercise indicates the practice files that you will use when working through the exercise. It also indicates any requirements you should attend to or actions you should take before beginning the exercise.
CLEAN UP	This paragraph following a step-by-step exercise provides instructions for saving and closing open files or programs before moving on to another topic. It also suggests ways to reverse any changes you made to your computer while working through the exercise.
1	Blue numbered steps guide you through hands-on exercises in a topic.
2	
1	Black numbered steps guide you through procedures in sidebars and expository text.
2	
See Also	This paragraph directs you to more information about a topic in this book or elsewhere.
Troubleshooting	This paragraph alerts you to a common problem and provides guidance for fixing it.
Tip	This paragraph provides a helpful hint or shortcut that makes working through a task easier.
Important	This paragraph points out information that you need to know to complete a procedure.
Keyboard Shortcut	This paragraph provides information about an available keyboard shortcut for the preceding task.
Ctrl+B	A plus sign (+) between two keys means that you must press those keys at the same time. For example, "Press Ctrl+B" means that you should hold down the Ctrl key while you press the B key.
	Pictures of buttons appear in the margin the first time the button is used in an exercise.
Interface objects	In exercises that begin with SET UP information, the names of program elements, such as buttons, commands, windows, and dialog boxes, as well as files, folders, or text that you interact with in the steps, are shown in bold black type.
User input	In exercises that begin with SET UP information, text that you should type is shown in bold blue type.

Using the Practice Files

Before you can complete the exercises in this book, you need to copy the book's practice files to your computer. These practice files, and other information, can be downloaded from the book's detail page, located at:

<http://go.microsoft.com/fwlink/?Linkid=192151>

Display the detail page in your Web browser and follow the instructions for downloading the files.

Important The Microsoft Outlook 2010 software is not available from this Web site. You should purchase and install that software before using this book.

While working through the exercises in this book, you will use some practice files that we provide, and you will create Outlook items to use as practice files in later exercises. The following table lists the practice files you will use and create while working through the exercises in this book.

Chapter	Use these files and items	Create these files and items
Chapter 1: Get Started with Outlook 2010	None	None
Chapter 2: Explore the Outlook Windows	None	None
Chapter 3: Send and Receive E-Mail Messages	We provide: Brochure.docx StrategySession.pptx	SBS First Draft message RE: SBS First Draft message FW: SBS First Draft message SBS Tradeshow Schedule message
Chapter 4: Store and Access Contact Information	None	Contact records for Nancy Anderson, Andrew Davis, Sara Davis, Andrea Dunker, and Idan Rubin
Chapter 5: Manage Scheduling	None	SBS Lunch with Jane appointment SBS Staff Meeting appointment SBS Get Together meeting SBS Pay Day event

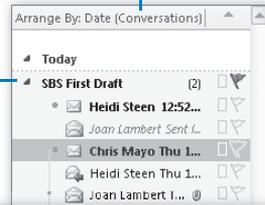
(continued)

Chapter	Use these files and items	Create these files and items
Chapter 6: Track Tasks	You provide: SBS First Draft message SBS Tradeshow Schedule message	Flagged SBS First Draft message Flagged SBS Tradeshow Schedule message SBS Dinner Reservations task SBS Order Brochures task SBS Send Dinner Invitations task
Chapter 7: Organize Your Inbox	You provide: SBS First Draft message FW: SBS First Draft message RE: SBS First Draft message SBS Tradeshow Schedule message	SBS Messages folder
Chapter 8: Manage Your Calendar	None	Secondary calendar
Chapter 9: Work with Your Contact List	We provide: JoanLambert.jpg SBSContacts.txt You provide: Contact records for Nancy Anderson, Andrew Davis, Sara Davis, Andrea Dunker, and Idan Rubin	SBS Contacts address book SBS Litware address book Contact records for Joel Lachance, Joan Lambert, Chris Mayo, Heidi Steen, Max Stevens, and Amy Strande Clients contact group Contact records for Eli Bowen, Liberty Munson, and Tjeerd Veninga
Chapter 10: Enhance Message Content	We provide: Lighthouse.jpg	Casual e-mail signature SBS Development Cycle message and embedded SmartArt graphic SBS Picture Tools message and embedded modified image
Chapter 11: Manage E-Mail Settings	You provide: SBS Messages folder	SBS Alert Test 1 message SBS rule
Chapter 12: Work Remotely	None	None
Chapter 13: Customize Outlook	None	None

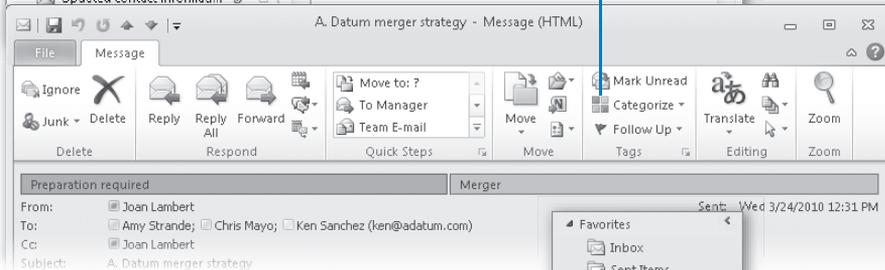
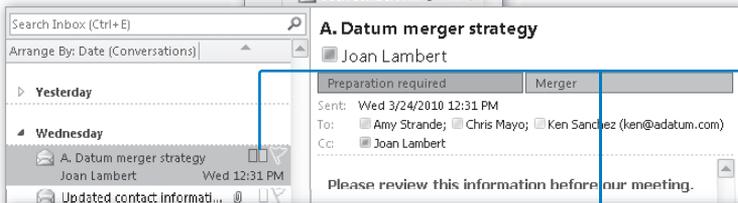
Chapter at a Glance

Arrange messages in different ways, [page 237](#)

Work with Conversation view, [page 232](#)

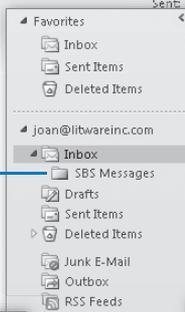


Organize Outlook items by using color categories, [page 244](#)

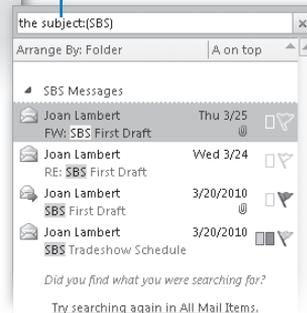
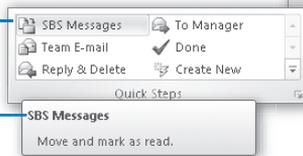


Organize messages in folders, [page 254](#)

Quickly locate messages, [page 261](#)



Manage messages by using Quick Steps, [page 258](#)



7 Organize Your Inbox

In this chapter, you will learn how to

- ✓ Work with Conversation view.
 - ✓ Arrange messages in different ways.
 - ✓ Organize Outlook items by using color categories.
 - ✓ Organize messages in folders.
 - ✓ Manage messages by using Quick Steps.
 - ✓ Quickly locate messages.
 - ✓ Print messages.
 - ✓ Delete messages.
-

You can use Microsoft Outlook 2010 to manage multiple e-mail accounts, including multiple Microsoft Exchange Server accounts with their associated contacts, calendars, and so on. Even if you use Outlook only for sending and receiving e-mail messages, you can rapidly build up a mass of messages that make it difficult to locate information. Fortunately, Outlook is designed to act as a complete information-management system; it provides many simple yet useful features that enable you to organize messages and other Outlook items and to quickly find information that you need.

Outlook 2010 automatically handles certain types of organization for you. In your Inbox, Outlook makes it easy to follow related messages (message threads) from multiple people by displaying the messages in Conversation view. Outlook Search almost instantly locates items that contain specific content, and it allows you to save search results as Search Folders in which you can view up-to-date search results at any time.

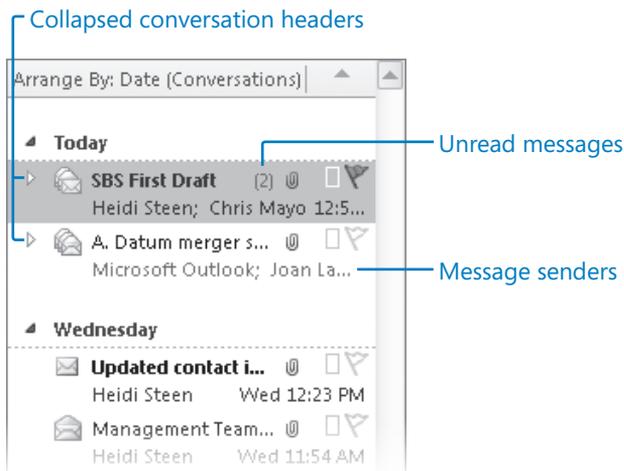
You can organize items in Outlook by storing related items in folders and by assigning color categories to related items.

In this chapter, you'll work with Conversation view to locate different levels of messages in a series. You'll display the messages in your Inbox in a variety of arrangements and organize messages by assigning color categories and by moving them to folders within your Inbox. You'll filter and find messages by using the Search feature, and use Search Folders. You'll work with the built-in Quick Steps. Finally, you'll preview, print, and delete messages.

Practice Files The exercises in this chapter use Outlook items you created in exercises in previous chapters. If an exercise requires an item that you don't have, you can complete the exercise in which you create the item before beginning the exercise, or you can substitute a similar item of your own. A complete list of practice files is provided in "Using the Practice Files" at the beginning of this book.

Working with Conversation View

Conversation view is an arrangement of messages grouped by subject. All the messages with the same subject appear together in your Inbox (or other message list) under one conversation header.



Until you expand the conversation header, the entire conversation takes up only as much space in your Inbox as a single message would.

The conversation header provides information about the messages within the conversation, including the number of unread messages and whether one or more messages includes an attachment, is categorized, or is flagged for follow up.

When you receive a message that is part of a conversation, the entire conversation moves to the top of your Inbox and the new message appears when you click the conversation header. When a conversation includes unread messages, the conversation header is bold. When there are multiple unread messages, the number is indicated in parentheses following the subject. The senders of the unread messages are listed below the subject.

Split Conversations

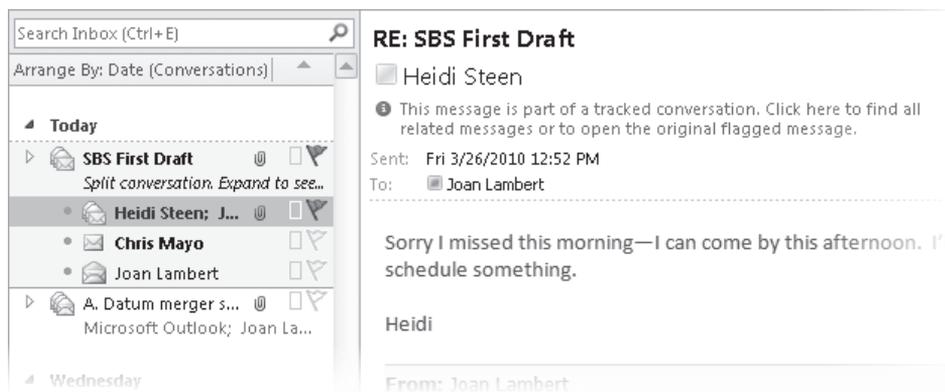
When an e-mail conversation involves more than two people, it frequently happens that more than one person responds to the same message, and other people respond to each of those messages. Multiple conversations emerge from the primary conversation in a process that you might think of as branches growing out from a tree—each can split into additional branches that are farther and farther from the trunk (the original message). A conversation that contains multiple branches is called a *split conversation*. Within a split conversation, individual conversation branches are marked by orange and gray dots. Larger orange dots indicate the most current message in each branch. Small orange dots indicate older messages. Small gray dots indicate messages that may be considered redundant. Messages within each conversation branch are connected by orange and gray lines (referred to as *visual threads*).

Tip Conversation view isn't new in Outlook 2010—it was first introduced in Outlook 2007—but it's greatly improved and is now the default view for your Inbox and other message folders.

Viewing Conversations

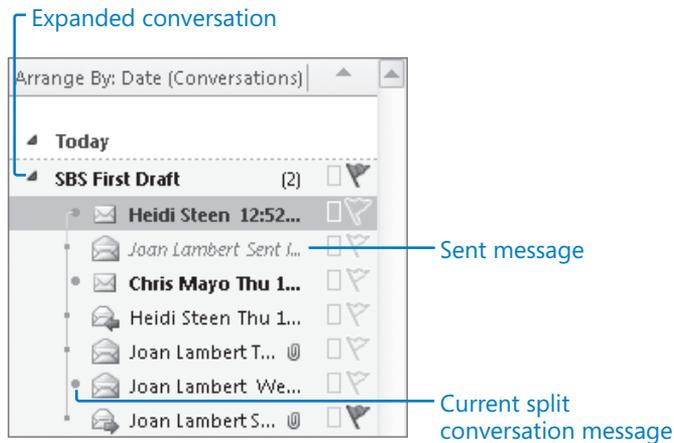
You can display differing levels of messages within a conversation, as follows:

- Click the conversation header or the Expand Conversation button to the left of the conversation header once to display the most recent message in the Reading Pane and to display the most recent message in each branch of a split conversation in the message list. These messages are indicated by orange dots.



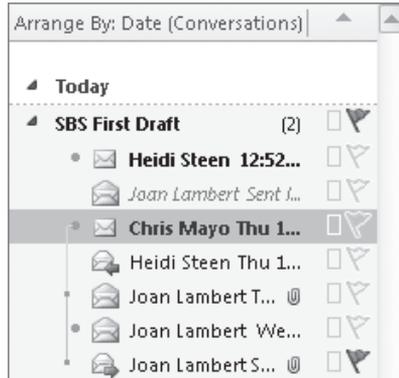
Click the conversation header once to display only the most recent messages.

- Click the conversation header again to expand the conversation to display all messages in the conversation.



Click the conversation header twice to display all messages.

- Click the most recent message in a split conversation to display the visual thread of that message branch.



Click a message to display its visual thread.

Conversation View Settings

By default, Conversation view displays messages stored in any folder, including sent messages that are stored in the Sent Items folder. (Within the expanded conversation, sent messages are indicated by italic font.) If you prefer to display only messages from the current folder, you can clear this setting on the Conversation Settings menu in the Conversation group on the View tab.

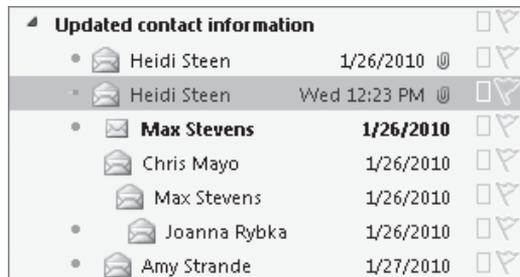
Other settings that you can turn on include:

- **Show Senders Above the Subject** This setting reverses the order of the information in the conversation header; you see the names of the conversation participants above the conversation subject. In some cases, such as when Outlook displays a message on the second line, the subject might not be visible at all.



The effect of the Show Senders Above The Subject setting in a split conversation.

- **Always Expand Conversations** This setting causes Outlook to display all messages in a conversation when you click the conversation header once, rather than twice.
- **Use Classic Indented View** This setting causes Outlook to indent older messages within individual message threads to show the progression of the thread. This setting is not as effective as the default for displaying split conversations because a message might be at the root of multiple branches but can appear only once in the message list.



The effect of the Use Classic Indented View setting.

Managing Conversations

Although the most apparent function of Conversation view is the grouping of related messages, its greatest usefulness is as a message-management tool. It can be especially handy for Outlook users within large organizations that use distribution lists to disseminate information to a large group of people. When hundreds of message recipients use the Reply All function to respond to a message, your Inbox can quickly become cluttered.

Troubleshooting Conversation View

As with many “new and improved” features, Conversation view has its fans and its detractors. Many Outlook users appreciate the efficiency of the automatically grouped messages and not having to wade through as many messages in their Inboxes; others rue the fact that this new feature can cause messages to vanish, apparently, from their Inboxes before they’ve even seen them.

Conversation view can present a very efficient means of viewing messages within a multi-threaded conversation; however, it also has its drawbacks. Because Conversation view displays only certain messages within a conversation, a specific message that you’re looking for might not be visible within a conversation. If this happens, you can turn off Conversation view (by clearing the Show In Conversations check box in the Conversation group on the View tab) and then use one of these methods to locate the message you want to find:

- Sort the messages by subject, and then type the first few letters of the conversation subject to scroll those messages to the top of the Message pane.
- Enter the subject into the Search box at the top of the Message pane and then specify any other criteria (such as the sender or date) of the message that you’re looking for to narrow the results.

After using either of these methods to display a set of messages, visually scan the messages to locate the one you’re looking for.

Conversation view enables you to manage all the messages within a conversation as a group. You can do this by clicking the conversation header to effectively select all the messages in the conversation (they won’t appear selected, but any action you apply to the conversation header applies to all the individual messages in the conversation) and then applying your action. Or you can use these new conversation-management tools:

- **Ignore Conversation** This command moves the selected conversation and any related messages you receive in the future directly to the Deleted Items folder.

Keyboard Shortcut Press **Ctrl+Del** to ignore the currently active conversation.

See Also For more information about keyboard shortcuts, see “Keyboard Shortcuts” at the end of this book.

Tip Be cautious when using the Ignore Conversation command. Outlook identifies “conversations” based on message subjects. If you receive unrelated messages in the future that have the same message subject as a conversation that you’ve chosen to ignore, you won’t receive those messages.

- **Clean Up Conversation** This command deletes redundant messages—messages whose text is wholly contained within later messages—from a conversation. By default, Outlook doesn't clean up categorized, flagged, or digitally signed messages. You can modify conversation clean-up settings on the Mail page of the Outlook Options dialog box.

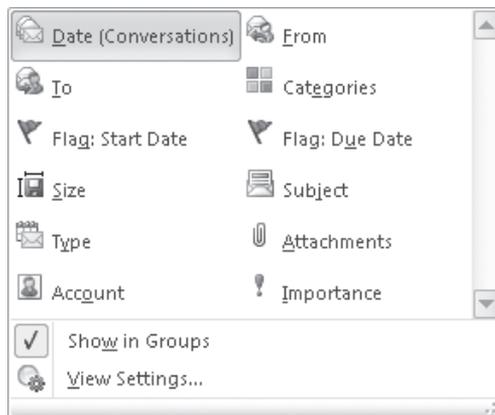
See Also For information about modifying mail settings, see “Personalizing Your Office and Outlook Settings” in Chapter 13, “Customize Outlook.”

Arranging Messages in Different Ways

As the number of messages in your Inbox increases, it can be challenging to keep track of them. You can arrange, group, and sort messages in Outlook to help you quickly determine which are the most important, decide which can be deleted, and locate any that need an immediate response.

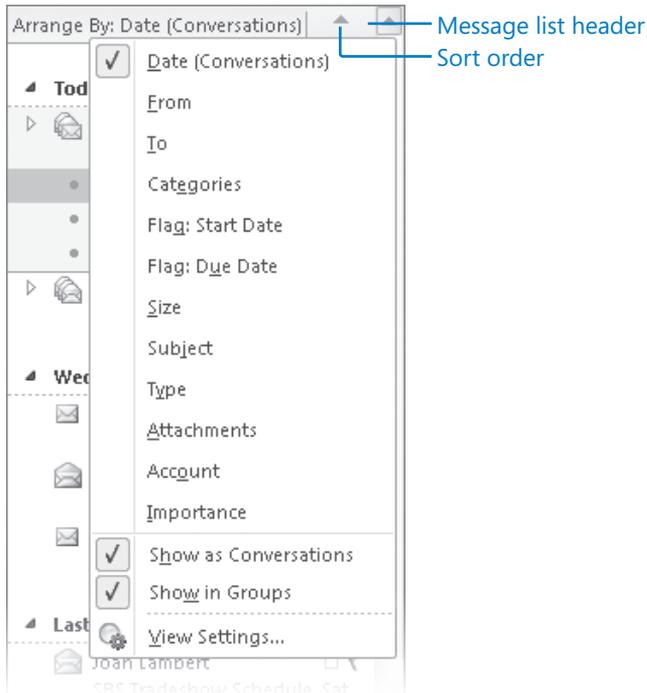
See Also For information about the available message folder views, see “Viewing Messages and Message Attachments” in Chapter 3, “Send and Receive E-Mail Messages.”

You can view a message list in Compact view, Single view, or Preview view. Regardless of the view you're displaying, you can arrange messages and conversations within the message list by choosing a standard arrangement from the Arrangement gallery on the View tab.



The Arrangement gallery.

Alternatively, you can click the Arrange By bar at the top of the message list and then click an option in the Arrange By list.



The Arrange By list.

Two options that affect the way messages appear within an arrangement are conversations and grouping. Both of these organizational options are turned on by default; you can turn either or both off.

See Also For information about conversations, see [“Working with Conversation View”](#) earlier in this chapter.

Grouping gathers messages that fit within specific arrangement categories under arrangement-specific headings so that you can manage common messages as one. For example, when messages are arranged by date, they are grouped by date: groups include each day of the current week, Last Week, Two Weeks Ago, Three Weeks Ago, Last Month, and Older.

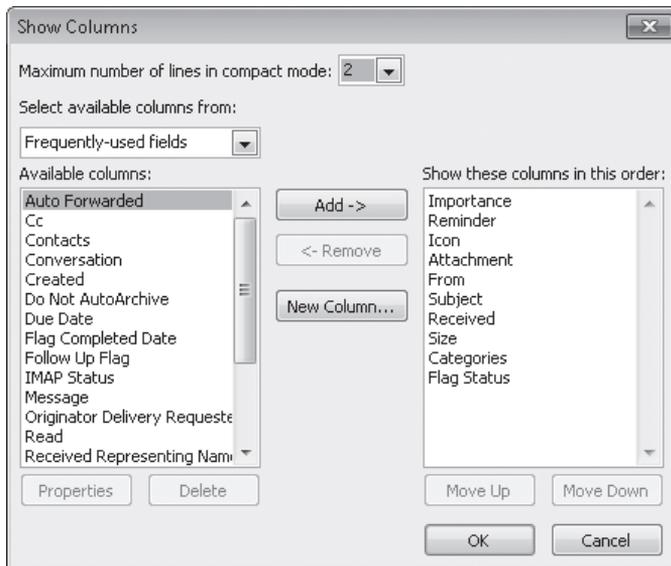
Each group has a header. You can expand or collapse an individual group by clicking the arrow to the left of the group name in the header. You can collapse the group containing the currently selected item by pressing the Left Arrow key, and you can expand a selected group by pressing the Right Arrow key. You can expand or collapse all groups by choosing a command from the Expand/Collapse list in the Arrangement group on the View tab.

By default, Outlook displays messages arranged by date, from newest to oldest. Alternatively, you can arrange items by any of the following attributes:

- **Account** Messages are grouped by the e-mail account to which they were sent. This is useful if you receive messages for more than one e-mail account in your Inbox (for example, if you receive messages sent to your POP3 account within your Exchange account mailbox).
- **Attachments** Messages are grouped by whether they have attachments and secondarily by date received.
- **Categories** Messages are arranged by the category you assign them to. Messages without a category appear first. Messages assigned to multiple categories appear in each of those category groups.
- **Flag: Start Date or Due Date** Unflagged messages and messages without specific schedules appear first. Messages that you've added to your task list with specific start or due dates are grouped by date.
- **From** Messages appear in alphabetical order by the message sender's display name. If you receive messages from a person who uses two different e-mail accounts, or who sends messages from two different e-mail clients (for example, from Outlook and from Windows Mail), the messages will not necessarily be grouped together.
- **Importance** Messages are grouped by priority: High (indicated by a red exclamation point), Normal (the default), or Low (indicated by a blue downward-pointing arrow).
- **To** Messages are grouped alphabetically by the primary recipients (the addresses or names on the To line). The group name exactly reflects the order in which addresses appear on the To line. Therefore, a message addressed to *Bart Duncan; Lukas Keller* is not grouped with a message addressed to *Lukas Keller; Bart Duncan*.
- **Size** Messages are grouped by the size of the message, including any attachment. Groups include Huge (1–5 MB), Very Large (500 KB–1 MB), Large (100–500 KB), Medium (25–100 KB), Small (10–25 KB), and Tiny (less than 10 KB). This feature is useful if you work for an organization that limits the size of your Inbox because you can easily locate large messages and delete them or move them to a personal folder.
- **Subject** Messages are arranged alphabetically by their subjects and then by date. This is similar to arranging by conversation except that the messages aren't threaded.
- **Type** Items in your Inbox (or other folder) are grouped by the type of item—for example, messages, encrypted messages, message receipts, meeting requests and meeting request responses, tasks, Microsoft InfoPath forms, and server notifications.

After arranging the items in your message list, you can change the sort order of the arrangement by clicking the sort order indicator that appears on the right side of the message list header.

Regardless of the view and arrangement you choose, you can sort messages by any visible column simply by clicking its column heading (and reverse the sort order by clicking the column heading a second time). You can change the displayed columns from the Show Columns dialog box, which you display by clicking the Add Columns button in the Arrangement group on the View tab.



The Show Columns dialog box.

Outlook displays the selected columns in the order shown in the list on the right side of the Show Columns dialog box. If displaying all the columns requires more space than is available, only some of the columns will be visible. If necessary, you can change the number of lines shown to accommodate more columns. However, you are likely to find that one of the standard views fits your needs.

In a list view, you can control the message arrangement, sorting, grouping, visible columns, and other settings from the shortcut menu that appears when you right-click any column header.

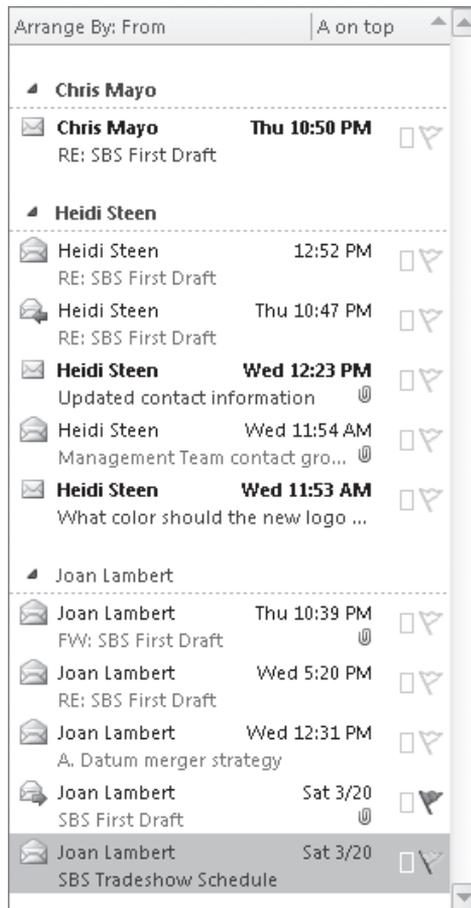
In this exercise, you'll change the arrangement, sort order, and grouping of messages in your Inbox, and filter the Inbox content to display only specific messages. Then you'll restore the default settings.



SET UP You don't need any specific practice files to complete this exercise; just use the messages in your Inbox. Display your Inbox in Messages view, and then follow the steps.

1. In the **Arrangement** gallery, click **From**.

Outlook rearranges and groups the messages in your Inbox alphabetically by sender.



The Sort Order indicator changes to match the selected arrangement.

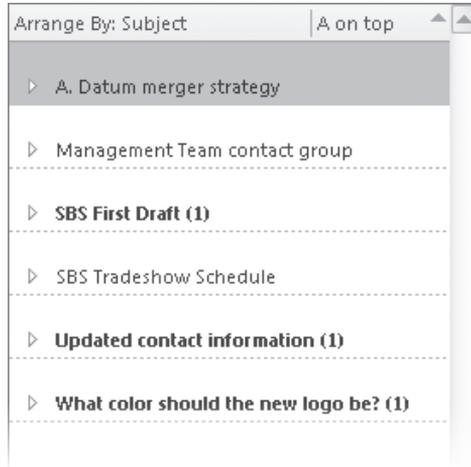
2. In the message list header, click **A on top**.

Outlook reverses the order of the messages and changes the sort order in the message header to Z On Top.

- In the message list header, click the **Arrange By** bar, and then click **Subject**. Outlook rearranges and groups the messages by subject, in alphabetical order.
- In the **Arrangement** group, click the **Expand/Collapse** button and then, in the list, click **Collapse All Groups**.

Expand/Collapse

Only the group headers are visible. There is a group header for each message or set of messages with the same subject.



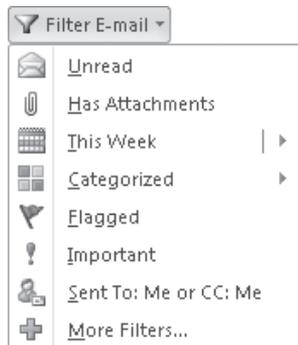
Collapsing groups of messages displays only the group headers.

Notice that the number of unread items in each group (if there are any) is indicated in parentheses following the conversation subject.

Filter E-mail

- On the **Home** tab, in the **Find** group, click the **Filter E-mail** button.

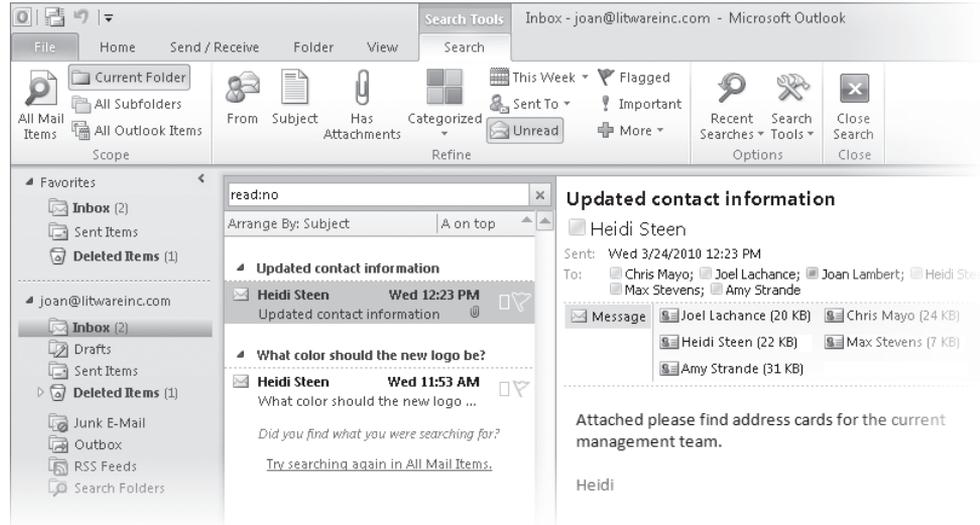
The Filter E-mail list expands. The list contains the same options that are present on the Search contextual tab.



In the Filter E-mail list, you can specify one or more criteria for the messages that are shown in the message list.

6. In the **Filter E-mail** list, click **Unread**.

Outlook enters the specified filter in the Search box at the top of the message list and filters your Inbox to display only unread messages. (If you have no unread messages in your Inbox, it appears to be empty.)



The Search box and Search contextual tab indicate the applied filter.

Troubleshooting The appearance of buttons and groups on the ribbon changes depending on the width of the program window or item window. For information about changing the appearance of the ribbon to match our screen images, see “Modifying the Display of the Ribbon” at the beginning of this book.

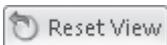
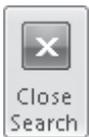
7. On the **Search** tab, in the **Close** group, click the **Close Search** button.

Outlook removes the filter and returns to the previous arrangement.

8. Experiment with the available arrangement, sorting, and grouping options.

9. On the **View** tab, in the **Current View** group, click the **Reset View** button. Then in the Microsoft Outlook dialog box that asks whether to reset the view, click **Yes**.

The message list returns to its original arrangement: grouped, by date, in conversations.



✖ CLEAN UP Arrange your Inbox content in the way that works best for you. Retain the default view settings before continuing, if you want them to match those shown in the rest of this book.

Marking Messages as Read or Unread

When a new message arrives in your Inbox, its header is bold and its icon depicts a closed envelope to indicate that you haven't yet opened the message—its status is *unread*. When you open a message in a message window or preview it for a certain length of time in the Reading Pane, its status changes to *read*. The message header is no longer bold, and its icon depicts an open envelope.

You might want to change the status of a message from read to unread, to remind you to revisit it, or from unread to read, if you know from the message subject that you don't need to take action on it.

You can manually change the status of a message by using these methods:

- Click a message in the message list or select multiple messages, and then on the Home tab, in the Tags group, click the Unread/Read button.
- Right-click a message or one of a group of selected messages in the message list, and then click Mark As Read or Mark As Unread.

Tip The shortcut menu that appears when you right-click an item shows only the available option.

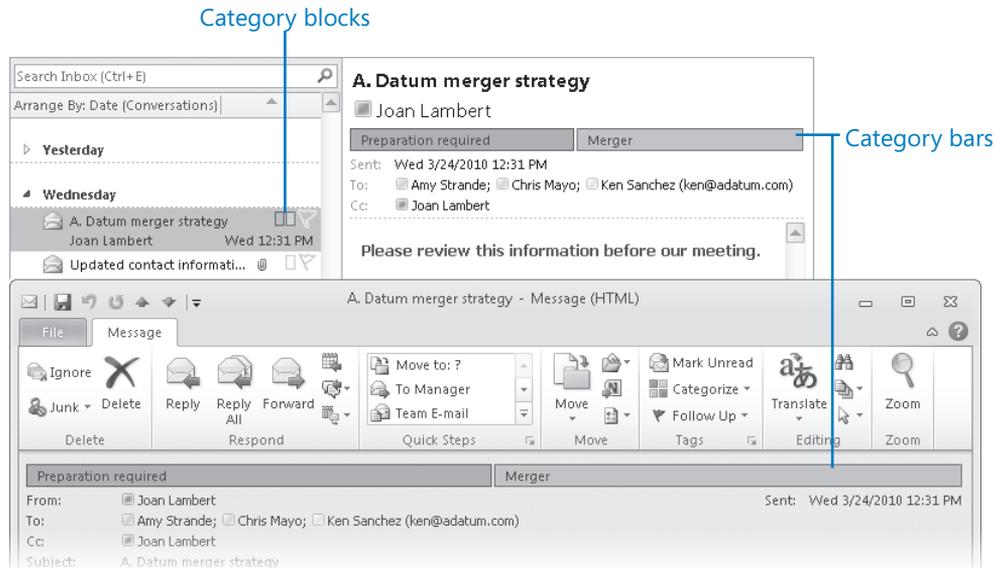
- Right-click a folder in the Navigation Pane, and then click Mark All As Read.

Keyboard Shortcuts Press **Ctrl+Q** to mark a message as read. Press **Ctrl+U** to mark a message as unread.

Organizing Outlook Items by Using Color Categories

To help you more easily locate Outlook items associated with a specific subject, project, person, or other condition, you can create a category specific to that condition and assign the category to any related items. You can assign a category to any type of Outlook item—a message, an appointment, a contact record, a note, and so on. For example, you might assign contact records for customers to a Customers category.

Outlook uses color categories, which combine named categories with color bars to provide an immediate visual cue when you view messages in your Inbox, appointments on your calendar, and so on. Depending on the view of the Outlook items, the category may be indicated by a simple colored block or a large colored bar.

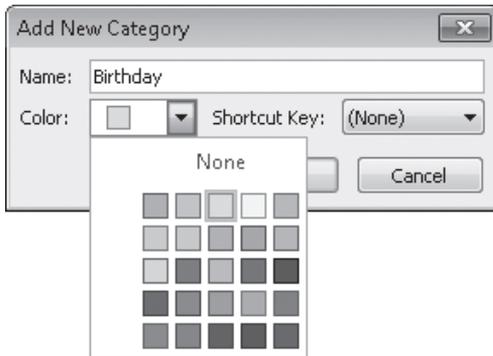


Category bars include the category name.

Tip You can locate, sort, and filter Outlook items by category. For information, see “Quickly Locating Messages” later in this chapter.

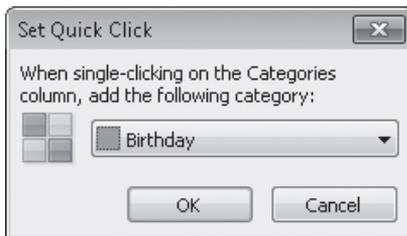
Outlook 2010 comes with six pre-configured color categories that are associated only with the color names. You can rename the six starting categories and create new categories. Each category can have the following elements:

- **Name** The category name can be one simple word or a long, descriptive phrase. The first 32 characters of the category name are visible in the color categories dialog box, but pointing to a truncated name displays a ScreenTip containing the entire name.
- **Shortcut key** You can assign any of the 11 available keyboard shortcut combinations (CTRL+F2 through CTRL+F12) to a color category. (You can assign only these 11 keyboard shortcuts within the dialog box.) By using a keyboard shortcut, you can assign a frequently used category in one step.
- **Color** You can assign any of the 25 available colors to a category, or you can choose not to assign a color. (You can’t choose colors other than the 25 shown.) When you assign a category that doesn’t have an associated color to an Outlook item, the color block or color bar is shown as white. You can assign one color to multiple categories.



You can assign any of 25 colors to a category.

One category is designated as the Quick Click category. Outlook assigns the Quick Click category by default when you simply click the Category box or column associated with an item. You can change the Quick Click category by clicking Set Quick Click on any one of the Categorize menus and then making your selection in the Set Quick Click dialog box that appears.



The Quick Click category is applied by default when you click a Category bar.

Tip You can also set the Quick Click category on the Advanced page of the Outlook Options dialog box. For more information, see “Personalizing Your Office and Outlook Settings” in Chapter 13, “Customize Outlook.”

You can apply a color category to a selected item or items by using any of these methods:

- In any mail or contacts folder, click the Categorize button in the Tags group on the Home tab, and then in the list, click the category you want.
- In any message list, click in the Categories column to assign the Quick Click category.
- In any calendar, click the Categorize button in the Tags group on the contextual tab (Appointment, Meeting, and so on) that appears for the selected item, and then click the category you want.
- In any folder, right-click an item or a selection of items, point to Categorize, and then click the category you want.

To quickly view the messages belonging to a category, you can group messages by category or include the category in a search. In a list view of any module, you can sort and filter by category. On the To-Do Bar, you can arrange your flagged messages and tasks by category.

Tip You can instruct Outlook to automatically assign a category to an incoming message that meets specific criteria by creating a rule. For more information, see “Creating Rules to Process Messages” in Chapter 11, “Manage E-Mail Settings.”

In this exercise, you’ll change the name and color of an existing category, assign a shortcut key to a category, and create categories. Then you’ll categorize a message, and experiment with organizing your Inbox contents by using categories.

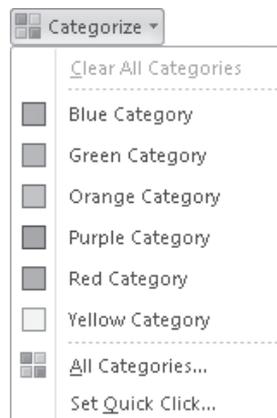


SET UP You need the **SBS Tradeshow Schedule**, **SBS First Draft**, **RE: SBS First Draft**, and **FW: SBS First Draft** messages you created in Chapter 3, “Send and Receive E-Mail Messages.” If you have not already created these messages, you can do so now, or you can substitute any messages in your Inbox. Display your Inbox, and then follow the steps.

1. In the message list, click the **SBS Tradeshow Schedule** message.
2. On the **Home** tab, in the **Tags** group, click the **Categorize** button.



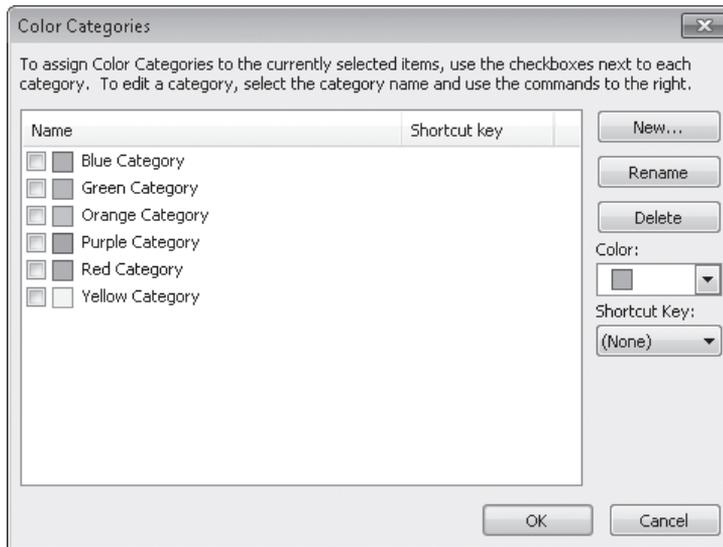
The Categorize list displays the available categories. Notice that you can remove all categories from a selected message or group of messages by clicking Clear All Categories.



If you haven't yet worked with categories, the Categorize list includes only the six standard categories named for their colors.

3. In the **Categorize** list, click **All Categories**.

The Color Categories dialog box opens, displaying the currently available categories.



You can rename any of the standard color categories or create new color categories.

4. In the **Color Categories** dialog box, click the **Blue Category** name (not the check box), and then click **Rename**.

Troubleshooting If you have already renamed the standard categories, you can either create or rename a different category.

5. With the category name selected for editing, type **Management**, and then press Enter.

Troubleshooting Don't click OK—doing so closes the dialog box.

The category name changes. The category order doesn't immediately change, but the next time you display the categories in a list or dialog box, they are reordered alphabetically.

Tip If you don't rename a standard color category before assigning it for the first time, Outlook gives you the option of renaming the category the first time you use it.

6. With the **Management** category still selected, click the **Color** arrow, and then in the lower-right corner of the color palette, click the **Dark Maroon** square.

The color associated with the Management category changes from Blue to Dark Maroon.

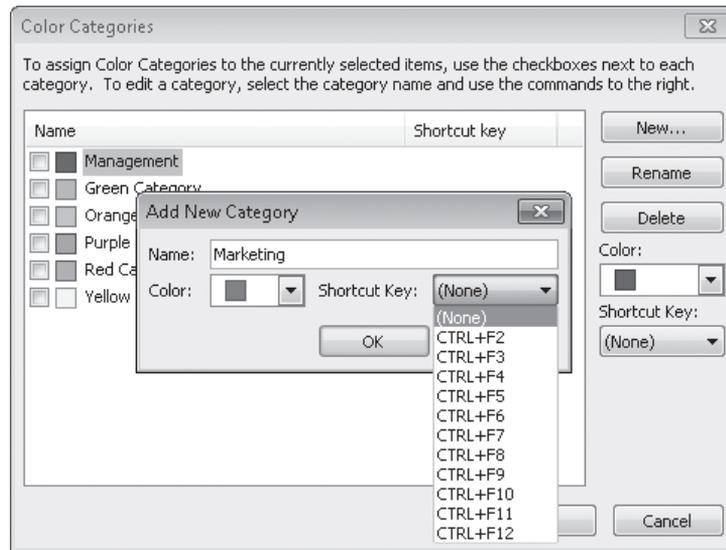
7. Repeat steps 4 and 5 to rename the **Orange Category** as **Travel Required**.

- In the **Color Categories** dialog box, click **New**.

The Add New Category dialog box opens.

- In the **Name** box, type **Marketing**. Click the **Color** arrow and then, in the color palette, click the **Dark Green** square. Then click the **Shortcut Key** list.

The list expands to display the keyboard shortcuts available to color categories.



Assign keyboard shortcuts to categories that you use frequently, to save time.

- In the **Shortcut Key** list, click **CTRL+F2**. Then in the **Add New Category** dialog box, click **OK**.

The new category appears at the bottom of the color categories list. Its selected check box indicates that it has been assigned to the currently selected message.

- In the **Color Categories** dialog box, click the **Green Category** name (not the check box), and then click **Delete**. In the **Microsoft Outlook** dialog box confirming that you want to delete the category, click **Yes**.

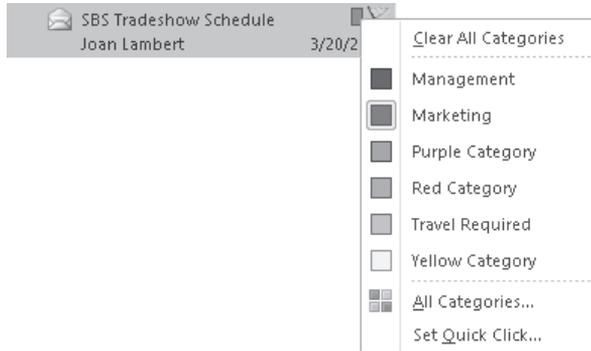
Keyboard Shortcut Press **Alt+D** to delete the selected category from the color categories dialog box.

The Green Category disappears from the list.

- In the **Color Categories** dialog box, click **OK**.

In the message list and in the To-Do Bar Task List, the Category box of the selected message changes to a dark green square. In the Reading Pane, a dark green bar with the category name *Marketing* appears at the top of the message.

13. In the **SBS Tradeshow Schedule** message header, right-click the **Category** box. The shortcut menu displays the color category options in alphabetical order.



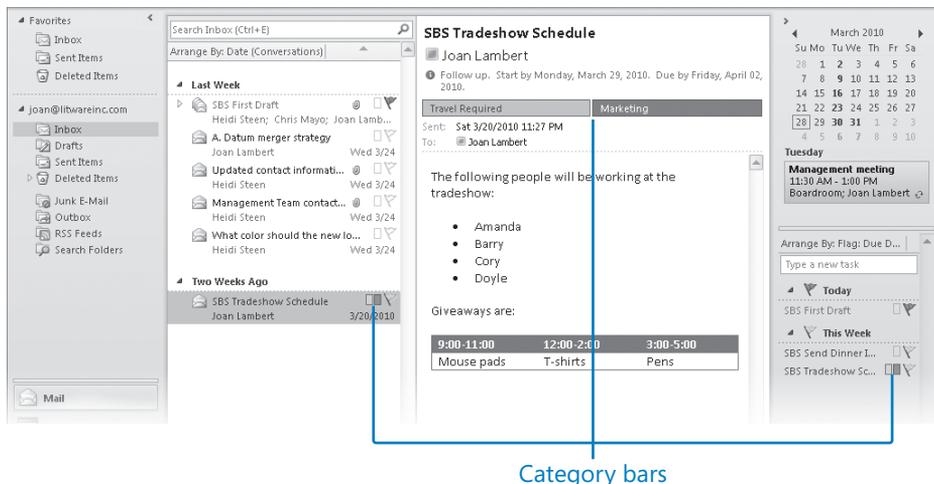
Right-clicking any Category box displays the Categorize list content.

14. On the shortcut menu, click **Travel Required**.

The second category box appears in the message header and in the To-Do Bar Task List.

Tip You can assign an unlimited number of categories to a message, but only the three most recently assigned appear in the message header.

The Reading Pane displays two colored category bars. If you assign more than three categories to a message, Outlook displays additional rows of category bars.



Category bars

Assigned categories are visible in the message list, Reading Pane, and To-Do Bar.

15. In the message list, expand the **SBS First Draft** conversation twice to display its messages. Click any message in the conversation, and then press **Ctrl+F2**.

The Marketing category is assigned to the selected message and also appears in the conversation header.

16. Click another message in the **SBS First Draft** conversation. On the **Home** tab, in the **Tags** group, click the **Categorize** button and then, in the list, click **Management**.

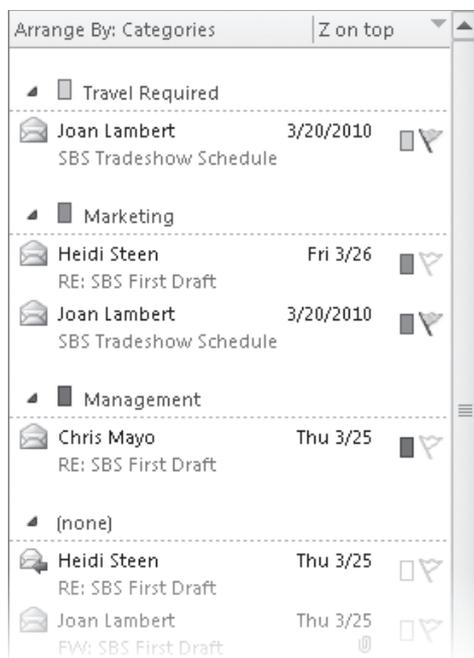
The Management category is assigned to the selected message, and also appears as a second category in the conversation header.

17. In the message list header, click the **Arranged By** bar and then, in the list, click **Categories**.

The messages are arranged by category, beginning with the uncategorized messages (None), followed by the categorized messages in alphabetical order by category.

18. To the right of the **Arranged By** bar, click **A on top**.

The sort order reverses to display the categorized messages (in reverse alphabetical order) at the top of the list.



You can quickly locate categorized messages by changing the message list arrangement.

- ✘ CLEAN UP** Return the message list to its default Date arrangement before continuing to the next exercise. Retain the SBS Tradeshow Schedule, SBS First Draft, RE: SBS First Draft, and FW: SBS First Draft messages for use in later exercises.

Recording Information by Using Outlook Notes

You can store miscellaneous information such as reminders, passwords, account numbers, and processes by recording them as electronic notes. Because your notes are available to you from wherever you access Outlook, this can be a very convenient way of retaining information you might need later. And because you're less likely to accidentally delete a note than a message, it is safer than sending information to yourself in an e-mail message.

Although notes are a type of Outlook item, they don't appear in the same type of windows as messages, appointments, contact records, and tasks. Instead, they appear in the form of "sticky notes" resembling the popular 3M-brand Post-It notes. You can view, sort, and organize notes in the same way you do other Outlook items. The standard views include:

- Icons
- Notes List
- Last Seven Days

You switch the view by clicking the View you want in the Current View gallery on the Home tab. If you're looking for a specific piece of information in a note, you can quickly locate it by typing a search word or phrase in the Search Notes box above the content pane.

By default, the Reading Pane is hidden in the Notes pane, but if you prefer, you can display the Reading Pane and view the content of notes without opening them. To do so, click the Reading Pane button on the View tab, in the Layout group, and then click Right or Bottom to display the Reading Pane in that location.

You can enter only text into a note; you can't format the text. If you paste formatted text into a note, it will change to the default font.

Tip Notes do support hyperlinks; if you enter a Web site address and then press Enter, the Web site address will change to blue, underlined text to indicate that it is a hyperlink. You can click the hyperlink to open the Web site or page in your default Web browser.

By default, note icons and sticky note representations are a pale yellow color, like the color of standard paper sticky notes. When you assign a category to a note, the note color changes to the category color.

You can change the default note color (you have the choice of white or a pastel shade of blue, green, pink, or yellow), size (small, medium or large), or font (any font installed on your computer) from the Notes and Journal page of the Outlook Options dialog box.

To store information in a note:

1. In the Navigation Pane, click the Notes button.
Outlook displays the Notes pane.
2. On the Home tab, in the New group, click the New Note button.
Outlook displays a new note. The current date and time appear at the bottom.
3. Enter the subject or title of the note, press Enter, and then enter the information you want to store into the note.
The first line of the note becomes its subject or title.
4. To save and close the note, click the Close button in the upper-right corner.
The note appears in the Notes pane. Only the subject is visible. You can access the stored information by opening the note (or by displaying the Reading Pane).

Organizing Messages in Folders

After you've read and responded to messages, you might want to keep some for future reference. You can certainly choose to retain them all in your Inbox if you want, but as the number of messages in your Inbox increases to the hundreds and even into the thousands, it might quickly become overwhelming. To keep your Inbox content low and avoid an accumulation of unrelated messages, you can organize messages into folders. For example, you can keep messages that require action on your part in your Inbox and move messages that you want to retain for future reference into other folders.

Tip Because the Outlook Search function provides the option of searching within all folders containing items of a particular type, you can easily locate a message that's been moved to a folder without having to remember exactly which folder it's in. For more information, see "Quickly Locating Messages" later in this chapter.

Popular personal-organization experts advocate various folder structures (for paper folders as well as for e-mail message folders) as an important part of an organizational system. You can apply any of these ideas when you create electronic folders in Outlook, or you can use any other structure that works for you. For example, you might create a folder for each project you're working on and store all messages regarding a particular project in its own folder. Or you might create a folder to store all messages from a particular person, such as your manager, regardless of the message subject.

When you create a folder, you specify the location of the folder within your existing Outlook folder structure and the type of items you want the folder to contain. You can create folders to contain the following types of items:

- Calendar items
- Contact items
- InfoPath Form items
- Journal items
- Mail and Post items
- Note items
- Task items

The selection you make governs the folder icon that precedes its name in the folder list, the folder window layout, the ribbon tabs and commands available in the folder, and the content of the Navigation Pane in the folder.

You can move messages to folders manually, or if your organization is running Exchange, you can have Outlook move them for you. You can automatically move messages to another folder by creating a rule—for example, you can instruct Outlook to automatically move all messages received from your manager to a separate folder. You can set up different rules that go into effect when you're away from the office.

See Also For information about automatically moving messages, see “Creating Rules to Process Messages” in Chapter 11, “Manage E-Mail Settings.”

In this exercise, you'll create a folder and then use different methods to move messages to the folder.



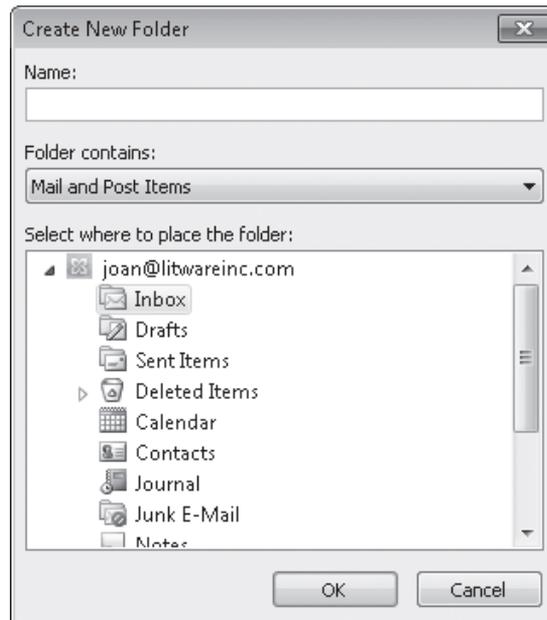
SET UP You need the SBS First Draft, RE: SBS First Draft, and FW: SBS First Draft messages you worked with in the previous exercise. If you have not already created these messages, you can do so now, or you can substitute any messages in your Inbox. Display your Inbox, and then follow the steps.



1. On the **Folder** tab, in the **New** group, click the **New Folder** button.

Keyboard Shortcut Press **Ctrl+Shift+E** to create a new folder.

The Create New Folder dialog box opens.



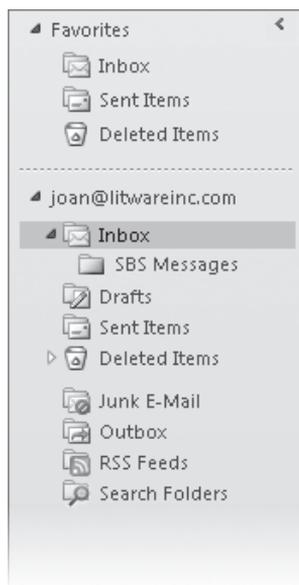
The default settings in the Create New Folder dialog box match the active module at the time you create the folder.

Troubleshooting If your default data file (the file in which your messages are stored) is a personal folder on your hard disk, the first item in the **Select Where To Place The Folder** box is **Personal Folders**.

- In the **Name** box, type **SBS Messages**. In the **Select where to place the folder** box, click **Inbox**. Then, with **Mail and Post Items** selected in the **Folder contains** list, click **OK**.

Tip The name of this folder begins with **SBS** so that you can easily differentiate it from other folders in your mailbox.

Because you created this folder from the **Inbox**, Outlook creates the new folder as a subfolder of the **Inbox**, and formats it to contain mail items.



The new folder will display the ribbon tabs of the **Mail** module because you designated that it will contain **Mail** items.

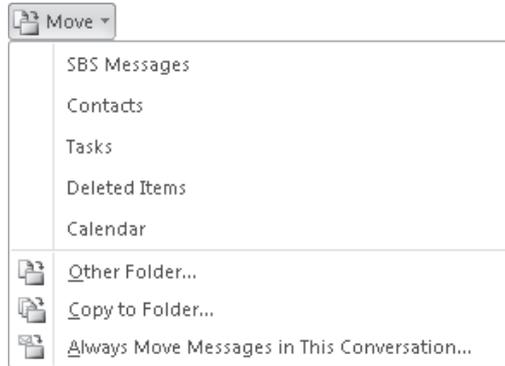
- In the message list, locate the **SBS First Draft, RE: SBS First Draft**, and **FW: SBS First Draft** messages.
- Drag the **SBS First Draft** message from the message list to the **SBS Messages** folder in the **Navigation Pane**.

The message moves from the **Inbox** to the **SBS Messages** folder.

- Click the **RE: SBS First Draft** message to select it. Then on the **Home** tab, in the **Move** group, click the **Move** button.

The **Move** list expands, displaying a list of folders and other move options.





The Move list automatically includes folders that you create.

- In the **Move** list, click **SBS Messages**.

The selected message moves from the Inbox to the SBS Messages folder.

- Right-click the **FW: SBS First Draft** message, click **Move**, and then click **SBS Messages**.

The conversation disappears from the Inbox.

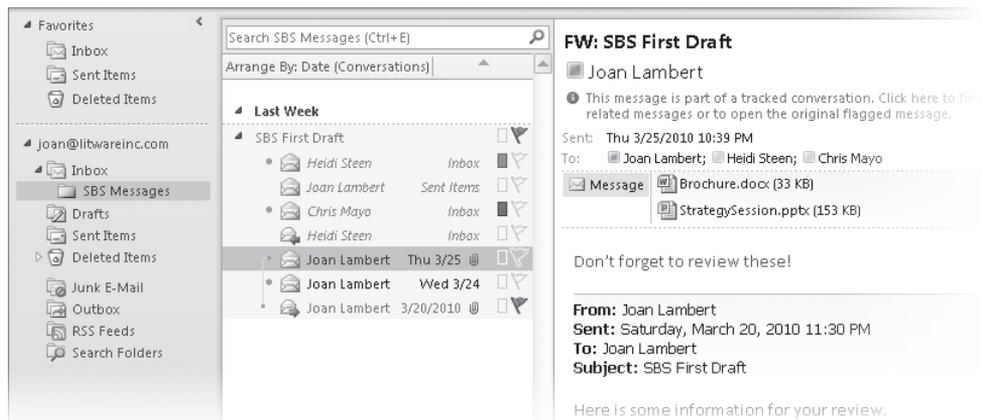
Tip When you move the last message of a conversation from the Inbox, related messages stored in other folders disappear.

- In the **Navigation Pane**, under the **Inbox** folder, click the **SBS Messages** folder.

The messages are visible in the new folder as part of a conversation.

- Expand the conversation header once.

All the messages in the conversation are visible in the list.



Messages that aren't in the current folder are shown in italics.

✘ CLEAN UP Retain the SBS Messages folder and its contents for use in later exercises.

Managing Messages by Using Quick Steps

A convenient new feature of Outlook 2010 is Quick Steps, which allow you to perform multiple tasks on messages by clicking only one button. Quick Steps are available from the Quick Steps gallery on the Home tab of any mail folder.



The default Quick Steps gallery.

You can use the built-in Quick Steps or create your own to accomplish as many as 12 tasks at once.

A default Outlook installation includes these five Quick Steps:

- **Move To** Moves the selected message to a folder that you specify the first time you use the Quick Step and marks the message as read. After you specify the folder, the Quick Step name changes to include the folder name.
- **Team E-mail** Creates a message to a person or people you specify the first time you use the Quick Step. You can edit the Quick Step to include Cc and Bcc recipients, a specific message subject, a follow-up flag, a level of importance, and specific message text, and to automatically send the message one minute after you click the Quick Step command.
- **Reply & Delete** Creates a response to the original message sender and immediately deletes the original message.

Troubleshooting The Reply & Delete Quick Step deletes the original message before you send the reply. If you close the response message composition window without sending it, the original message will no longer be in your Inbox. If you want to respond to the original message, you first need to retrieve it from your Deleted Items folder.

- **To Manager** Forwards the selected message to a person or people you specify the first time you use the Quick Step. You can edit the Quick Step to include Cc and Bcc recipients, a specific message subject, a follow-up flag, a level of importance, and specific message text, and to automatically send the message one minute after you click the Quick Step command.
- **Done** Moves the selected message to a folder that you specify the first time you use the Quick Step, marks the message as read, and marks the message as complete so that a check mark is displayed in the follow-up flag location.

For each of the built-in Quick Steps, you can change its name; edit, add, and remove actions; and specify tooltip text that appears when you point to the Quick Step in the Quick Steps gallery. You can assign shortcut keys (Ctrl+Shift+1 through Ctrl+Shift+9) to up to nine Quick Steps.

Tip You can create new Quick Steps to simplify the performance of many types of message-management actions. For more information, see “Creating and Managing Quick Steps” in Chapter 13, “Customize Outlook.”

In this exercise, you will set up and use a built-in Quick Step.



SET UP Use the SBS Tradeshow Schedule message you worked with earlier in this chapter and the SBS Messages folder you created in the previous exercise. If you did not create these practice files, you can do so now or substitute any message and folder in your Inbox. Display your Inbox, locate the SBS Tradeshow Schedule message, and then follow the steps.

1. On the **Home** tab, in the **Quick Steps** gallery, click **Move to: ?**.

The First Time Setup dialog box for the selected command opens.

Some generic Quick Steps require that you supply information the first time you use them.

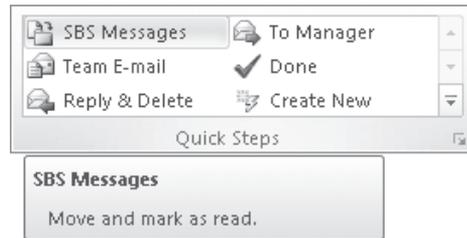
2. Click the **Move to folder** arrow and then, in the list, click **SBS Messages**.
In the Name box, the name of the Quick Step changes from *Move To: ?* to *SBS Messages*.
3. In the **First Time Setup** dialog box, click **Options**.
The Edit Quick Step dialog box opens.



The Move To command doesn't include many standard options.

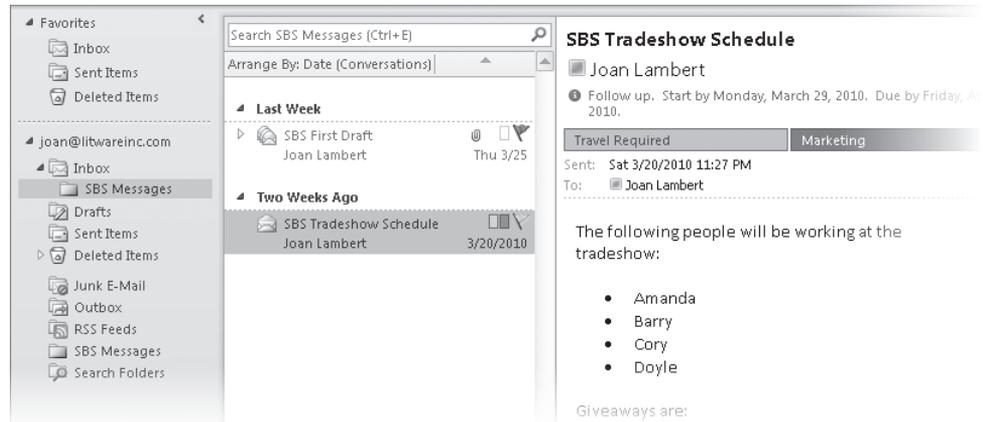
Notice that you can change the existing actions (Move To Folder and Mark As Read) and add actions to the standard Quick Step.

4. In the **Tooltip text** box, select the existing text and then type **Move and mark as read**.
5. In the **Edit Quick Step** dialog box, click **Save**.
In the Quick Step gallery, the Quick Step name changes from *Move To: ?* to *SBS Messages*.
6. In the message list, click the **SBS Tradeshow Schedule** message to select it.
7. In the **Quick Steps** gallery, point to **SBS Messages**.
Your custom tooltip appears below the ribbon.



You can supply custom tooltip text for any Quick Step.

8. In the **Quick Steps** gallery, click **SBS Messages**.
The selected message disappears from the message list.
9. In the **Navigation Pane**, under the **Inbox** folder, click the **SBS Messages** folder.
The message has been moved to the designated folder.



The categories and follow-up flag of the moved message are intact.

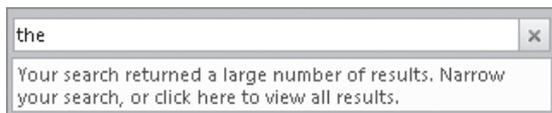
✘ CLEAN UP Retain the SBS Messages folder and its contents for use in later exercises.

Quickly Locating Messages

The Outlook Search feature is based on the Windows Search technology that is built into Windows 7 and Windows Vista Service Pack 2. Using the Windows Search technology, you can find any file on your computer that contains a specified search term—whether in a file or folder name, in document or workbook content, in an e-mail message within Outlook, in a message attachment, in a picture, music, or video file, and so on. (As a matter of fact, if you prefer to do so, you can conduct all of your Outlook searches from the Windows Start menu.)

You can use the Search feature to locate specific terms in any Outlook item. Although you can search for items in the Calendar, Contacts, Tasks, and Notes modules, you most often use it to locate messages in your Inbox and other mail folders. The Search feature can locate search terms in a message or in a file attached to a message. As you enter a search term in the Search box located at the top of the content pane in any module, Outlook filters the items to show only those items in the module that contain the search term and highlights the search term in the list of results.

If the search term you enter produces more than 200 results, only the first 200 are displayed, and an information bar appears in the Search Results pane.



Search displays only the first 200 available results unless you request more.

You can display all the results for the current search term by clicking the message bar, or you can narrow the results by expanding the search term or by specifying other search criteria, such as the sender, the recipient (whether the message was addressed or only copied to you), a category assigned to the item, whether the message contains attachments, and so on.

Outlook 2010 features the Search contextual tab. This ribbon tab appears when you activate the Search box in any Outlook module. You can enter search terms into the Search box and refine your search by using the commands on the Search contextual tab.

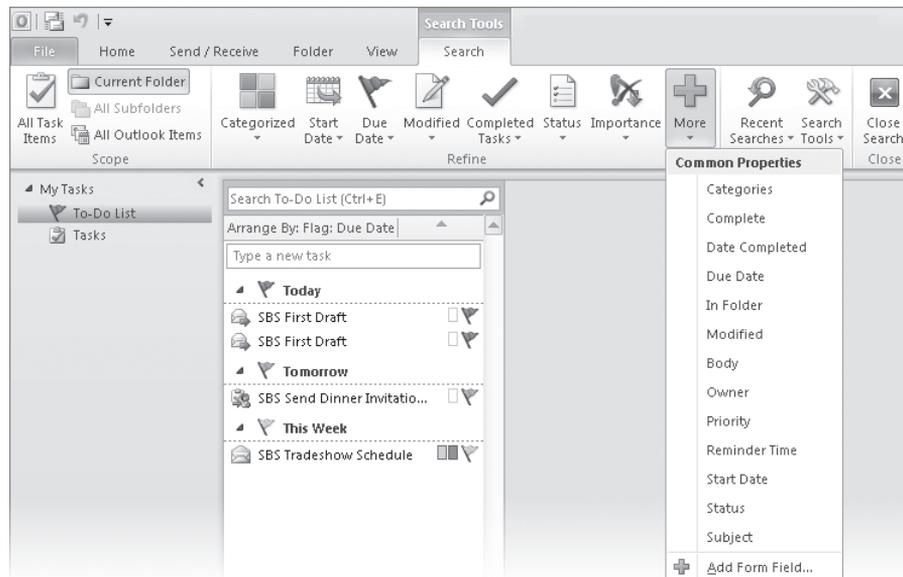


The Search tab appears when you click in a Search box or filter the contents of a message folder.

When searching any folder, you can use the commands on the Search tab to set the scope of the search and to more closely define the search specifications. You can also return to the results of previous searches.

See Also For information about Windows 7 search features, refer to *Windows 7 Step by Step* by Joan Lambert Preppernau and Joyce Cox (Microsoft Press, 2009).

The buttons available in the Scope and Refine groups vary based on the type of folder you're searching. The Scope group always offers the options of the current folder, all subfolders, all folders of the current type, and all Outlook items. The commands in the Refine group change to reflect common properties of items stored in the current folder type. The most common properties are shown as buttons in the Refine group; additional properties are available for selection from the More list.



You can search for an item based on any property.

When you click a button in the Refine group or a property in the More list, that property appears in the Search box with a placeholder for you to specify the value you're looking for. As you define the criteria for a search, Outlook filters out all messages that don't match, which makes it easy to find exactly what you're looking for. And here's the neat thing: Outlook searches not only the content of the e-mail message header and the message itself, but also the content of message attachments. So if the search term you're looking for is in a Microsoft Word document attached to a message, the message is included in the search results.

Tip If your organization uses **Public Folders** (a feature of Exchange) you can use these same tools to search a Public Folder, but the content isn't filtered instantly; you must press **Enter** or click the **Search** button to get the same results as you would in a standard account folder.

Using Search Folders

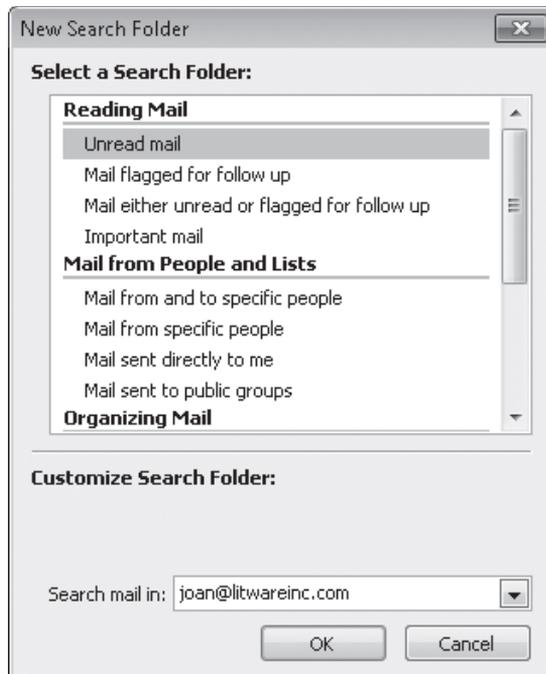
A Search Folder displays all the messages in your mailbox that match a specific set of search criteria, no matter which folders the messages are actually stored in. When you create a Search Folder, it becomes part of your mailbox and is kept up to date. The Search Folder module is located in the Navigation Pane under your top-level mailbox, at the same level as the Inbox.

Outlook 2010 doesn't include any standard Search Folders. If you want quick access to messages that fit a specific set of criteria, you can create a custom Search Folder. To do so, follow these steps:

1. Display any mail folder.
2. On the Folder tab, in the New group, click New Search Folder.

Keyboard Shortcut Press **Ctrl+Shift+P** to create a Search Folder.

The New Search Folder dialog box opens.



Search Folder categories include Reading Mail, Mail From People And Lists, Organizing Mail, and Custom.

3. In the New Search Folder dialog box, select the type of Search Folder you want to create, and then click OK.

You can choose from the standard options presented or click Create A Custom Search Folder to specify other search options.

You can make changes to the contents of an existing Search Folder by right-clicking the folder and then clicking Customize This Search Folder.

Outlook automatically keeps Search Folder contents up to date. The names of folders containing unread items are bold, followed by the number of unread items in parentheses. The names of folders containing items flagged for follow up are bold, followed by the number of flagged items in square brackets. The names of folders whose contents are not up to date are italic. To update a Search Folder, click the folder name.

Each message in your mailbox is stored in only one folder (such as your Inbox), but it might appear in multiple Search Folders. Changing or deleting a message in a Search Folder changes or deletes the message in the folder in which it is stored.

In this exercise, you'll use the Search feature to locate a specific message in your Inbox.

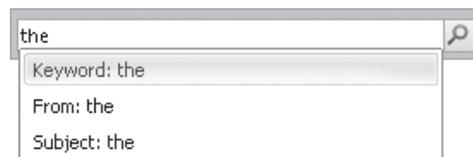


SET UP Use the SBS First Draft, RE: SBS First Draft, FW: SBS First Draft, and SBS Tradeshow Schedule messages, and the SBS Messages folder, you worked with earlier in this chapter. If you didn't create those practice files, you can do so at this time or substitute messages and a folder of your own. Display your Inbox and the Reading Pane, and then follow the steps.

1. In the **Search** box at the top of the message list, type **the**.

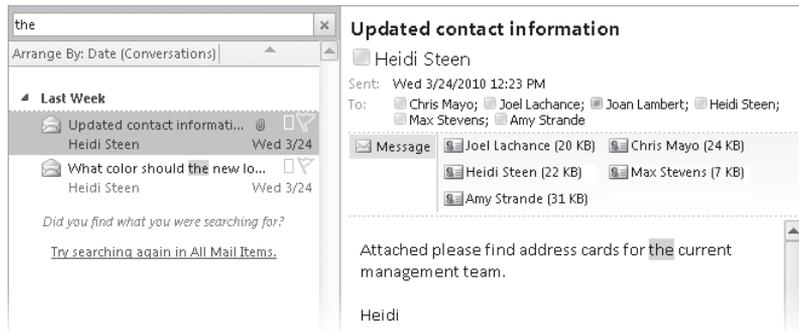
Keyboard Shortcut Press F3 or Ctrl+E to move the cursor to the Search box.

As you type, the Search contextual tab appears on the ribbon, and options for refining your search appear below the Search box.



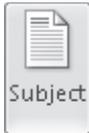
Selecting an option other than Keyword enters the alternative search criterion (and term) in the Search box.

Outlook filters the messages in your Inbox to include only those that contain the word *the*, and highlights all occurrences of the word in the message list and in the active message.



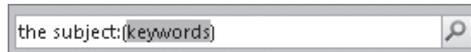
Initial search results include only messages contained in the Inbox folder and not in any of its subfolders or any other mailbox folders.

In the lower-left corner of the program window, the status bar displays the number of messages included in the search results.



2. On the **Search** tab, in the **Refine** group, click the **Subject** button.

Outlook adds the subject criterion to the Search box and prompts you to enter keywords that should appear in the Subject field of all search results.



You replace the placeholder with the words you want to find in the subject field.

3. With **keywords** highlighted, type **SBS**.

Outlook instantly updates the search results to display only the messages in your Inbox that contain the word *the* and have *SBS* somewhere in the Subject field.



If you've followed along with all the exercises in this chapter, it's likely that the current search returns no results.



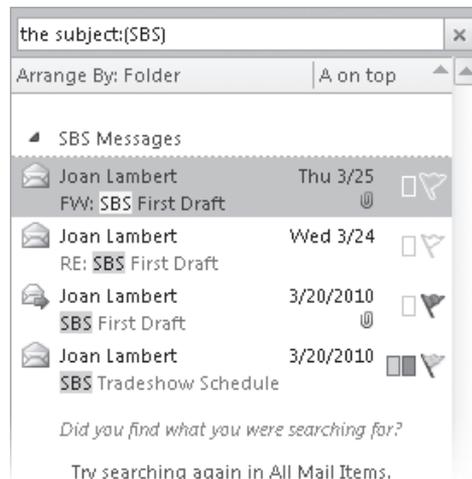
4. On the **Search** tab, in the **Scope** group, click the **All Subfolders** button.

Keyboard Shortcut Press **Ctrl+Alt+Z** to expand a search to include subfolders. Press **Ctrl+Alt+A** to expand a search to include all items of the current type.

The SBS First Draft conversation and SBS Tradeshow Schedule message that you moved to the SBS Messages subfolder in previous exercises appear in the search results.

- In the message list header, click the **Arrange By** bar, and then click **Folder**.

The search results change to reflect the new arrangement.

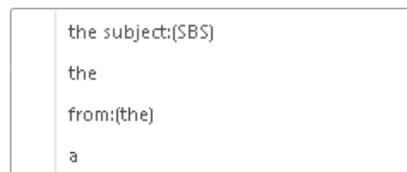


Grouping the results of a search that includes All Subfolders by folder can help you to locate messages.

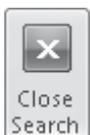


- In the **Options** group, click the **Recent Searches** button.

Your recent searches are saved so that you can use the same search again at another time.



Clicking a previous set of search criteria reruns that search against your current items.



- Experiment with locating information by specifying criteria. When you finish, click the **Close Search** button to remove the filter and redisplay the Inbox message list.

Keyboard Shortcut Press **Esc** to clear the search results.

✘ CLEAN UP Retain the SBS Messages folder and its contents for use in later exercises.

Printing Messages

Although electronic communications certainly have less environmental impact than paper-based communications, you might from time to time want or need to print an e-mail message—for example, if you want to take a hard copy of it to a meeting for reference, or if you keep a physical file of important messages or complimentary feedback. You can print the message exactly as it appears in your Inbox or embellish it with page headers and footers. Outlook prints the message as shown on-screen, including font and paragraph formats.

In this exercise, you'll preview a message as it will appear when printed, add a page header, and then print the message.

Important To fully complete this exercise, you must have a printer installed. If you don't have a printer installed, you can perform all steps of the exercise other than printing.

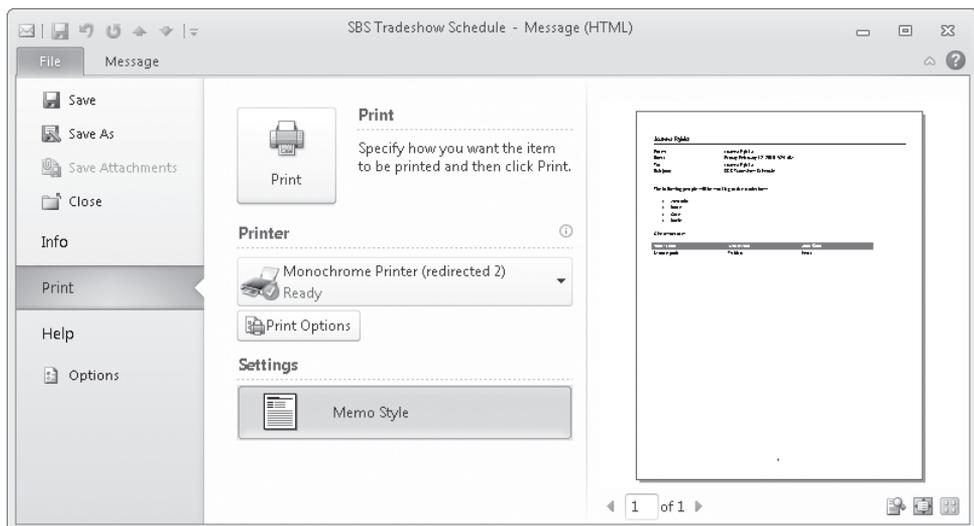
To install a printer, click the Start button, click Devices And Printers, and then on the toolbar, click Add A Printer. Follow the wizard's instructions to install a local or network printer. Your network administrator can provide the information you need to install a network printer.



SET UP You need the SBS Tradeshaw Schedule message you worked with earlier in this chapter. If you did not create that message, you can do so now, or you can substitute any message in your Inbox. Open the SBS Tradeshaw Schedule message, and then follow the steps.

1. In the message window, display the Backstage view, and then click **Print**.

The Print page of the Backstage view displays the current print settings.

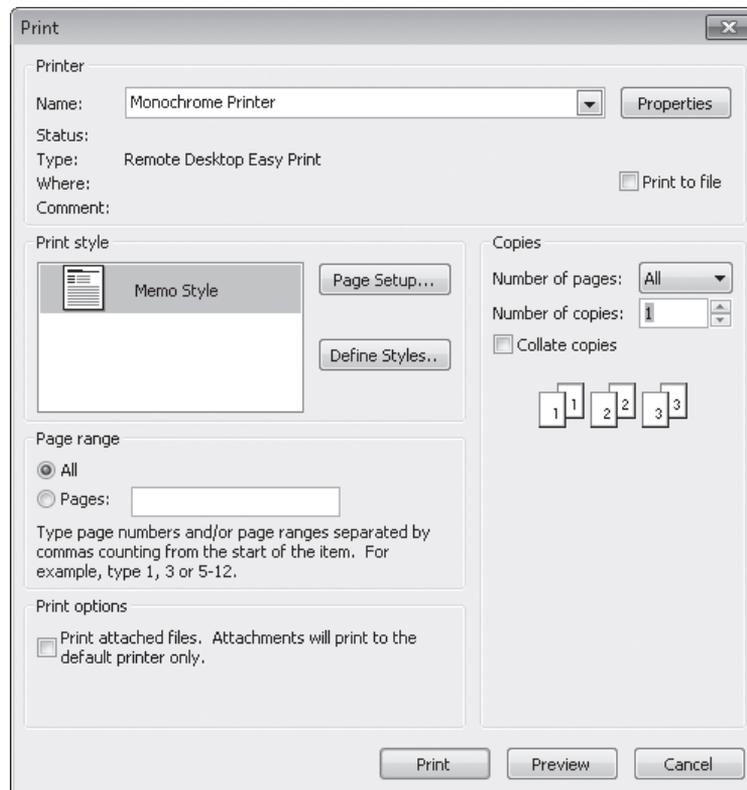


The Print page of the Backstage view.

The right pane displays the message as it will appear when printed, if you click the Print button without changing the settings shown in the center pane. If necessary, you can adjust the following settings:

- **Printer** Select an installed printer or add a new one.
 - **Print Options** Opens the Print dialog box, where you can change the default printing options before printing. You can also change an existing print style (the way the message is presented on the printed page) or create a new one.
 - **Print Style** Choose from the existing print styles available for the selected message or other Outlook item. The default print style is Memo style, which prints your name, the message header information, and then the message content.
2. Click the **Print Options** button.

The Print dialog box opens, displaying your default printer settings, which you can change before printing. Clicking OK prints the message with the current settings.



The Print dialog box displaying the basic Memo Style for printing a message.

3. In the **Print** dialog box, click **Page Setup**.

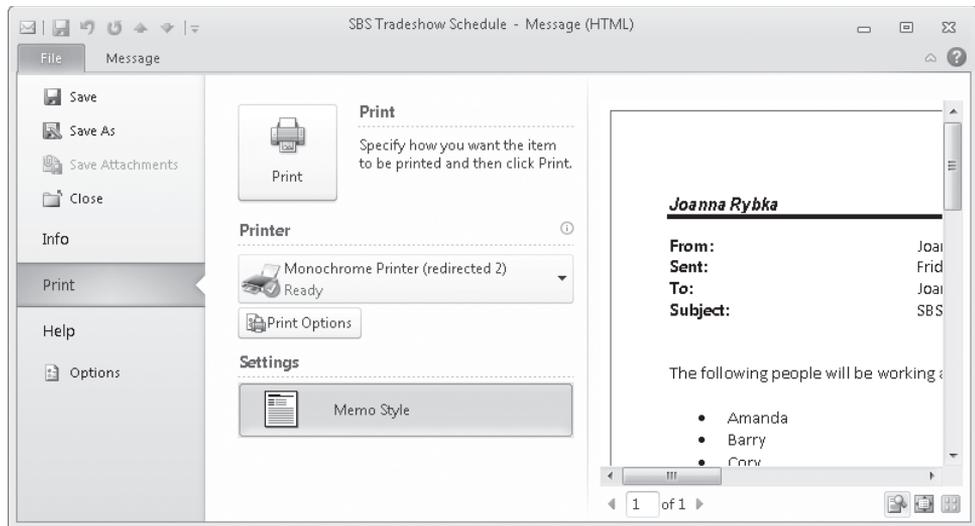
The Page Setup: Memo Style dialog box opens. You can change the font, paper size, page margins, header, and footer from this dialog box.

4. In the **Page Setup: Memo Style** dialog box, on the **Format** page, click the **Font** button.

The Font dialog box opens.

5. In the **Font** list, click **Arial**. In the **Font style** list, click **Narrow Bold Italic**. Then click **OK**.
6. In the **Page Setup: Memo Style** dialog box, click **OK**, and then click **Preview** in the **Print** dialog box.
7. In the lower-right corner of the **Print** page of the Backstage view, click the **Actual Size** button to display the message at 100 percent of its size.

The right pane of the Print page displays the message as it will appear when printed, with the header text in Arial Narrow Bold Italic.

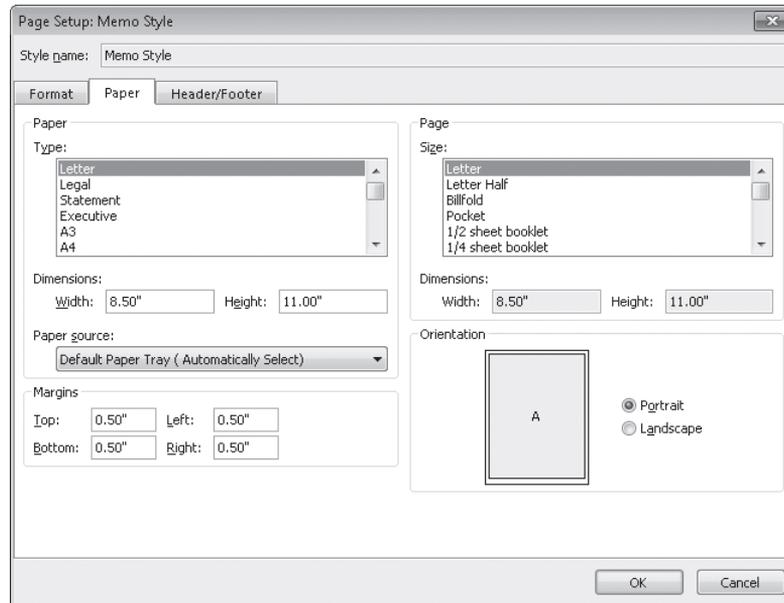


You can preview the message at its full size.

Tip If a message will be longer than one page when printed with the current settings, you can click the **Multiple Pages** button to preview all pages of the message at the same time. You might find this useful when, for example, you want to check page breaks or scan a document for a particular element.

8. Click **Print Options**, click **Page Setup**, and then in the **Page Setup: Memo Style** dialog box, click the **Paper** tab to see the available options.

In addition to choosing the paper size, you can select the number of pages that will be printed on each sheet of paper, and set the page margins and the orientation.



The Paper page of the Page Setup dialog box.

9. Click the **Header/Footer** tab.
10. In the **Header** area, type **For Your Information** in the center box, and then click the **Font** button above the box. In the **Font** dialog box, under **Size**, click **16**, and then click **OK**.

The text you entered doesn't reflect the font size change, but the Header box to the left of the Font button indicates the current font selection.



11. In the **Footer** section, select the default text (the page number) that appears in the center box. Then in the **AutoText** box that appears near the bottom of the **Page Setup dialog** box, click the **User Name** button.

Outlook will print the specified text at the top of the page and your name (or user name, if different) at the bottom.

12. In the **Page Setup** dialog box, click **OK**, and then in the **Print** dialog box, click **Print**.
- Troubleshooting** If the **Save As** dialog box opens, you do not have a printer installed.

Outlook prints the message, including your custom header and footer, to the active printer.



CLEAN UP If you don't want to retain the custom header and footer as part of the standard message printing template, remove them from the Memo Style. Then close the SBS Tradeshaw Schedule message.

Deleting Messages

When you delete a message, contact record, or any other item, Outlook temporarily moves it to the Deleted Items folder of your mailbox. You can open the folder from the Navigation Pane, view items that have been deleted but not purged, and restore items (undelete them) by moving them to other folders.

Keyboard Shortcut Press **Shift+Delete** to permanently delete a message from a message list without first moving it to the Deleted Items folder.

By default, Outlook does not permanently delete items until you purge them from the Deleted Items folder. You can empty the entire Deleted Items folder manually or automatically, or you can permanently delete individual items from it.

To permanently delete an individual item, follow these steps:

1. In the Navigation Pane, click the Deleted Items folder to display its contents.
2. In the Deleted Items list, click the item (or select multiple items) you want to delete.
3. On the Home tab, in the Delete group, click the Delete button (or press the Delete key).
4. In the Microsoft Outlook message box asking you to confirm that you want to permanently delete the selected item(s), click Yes.

To manually empty the Deleted Items folder, follow these steps:

- In the Navigation Pane, right-click the Deleted Items folder, and then click Empty Folder.

To automatically empty the Deleted Items folder each time you exit Outlook, follow these steps:

1. Display the Backstage view, and then click Options.
2. On the Advanced page of the Outlook Options dialog box under Outlook Start And Exit, select the Empty Deleted Items Folder When Exiting Outlook check box. Then click OK.

Key Points

- You can filter and locate messages in your mailbox by using the Search feature.
- You can group and sort messages by sender, time, subject, size, category, or any other field.
- You can assign color-coded categories to messages and then group and sort items by color category. You can use the default Outlook categories or tailor them to fit your needs.
- You can record miscellaneous information in electronic notes. You can categorize, search, display, and sort notes, and send notes to other people.
- You can create folders to organize your mail, and move items to folders manually or automatically.
- You can print a message when you need a paper copy. You can select from several print styles and make modifications to the print styles to suit your needs.
- When you delete a message or other Outlook item, it moves to the Deleted Items folder and is not permanently deleted until you empty the folder.

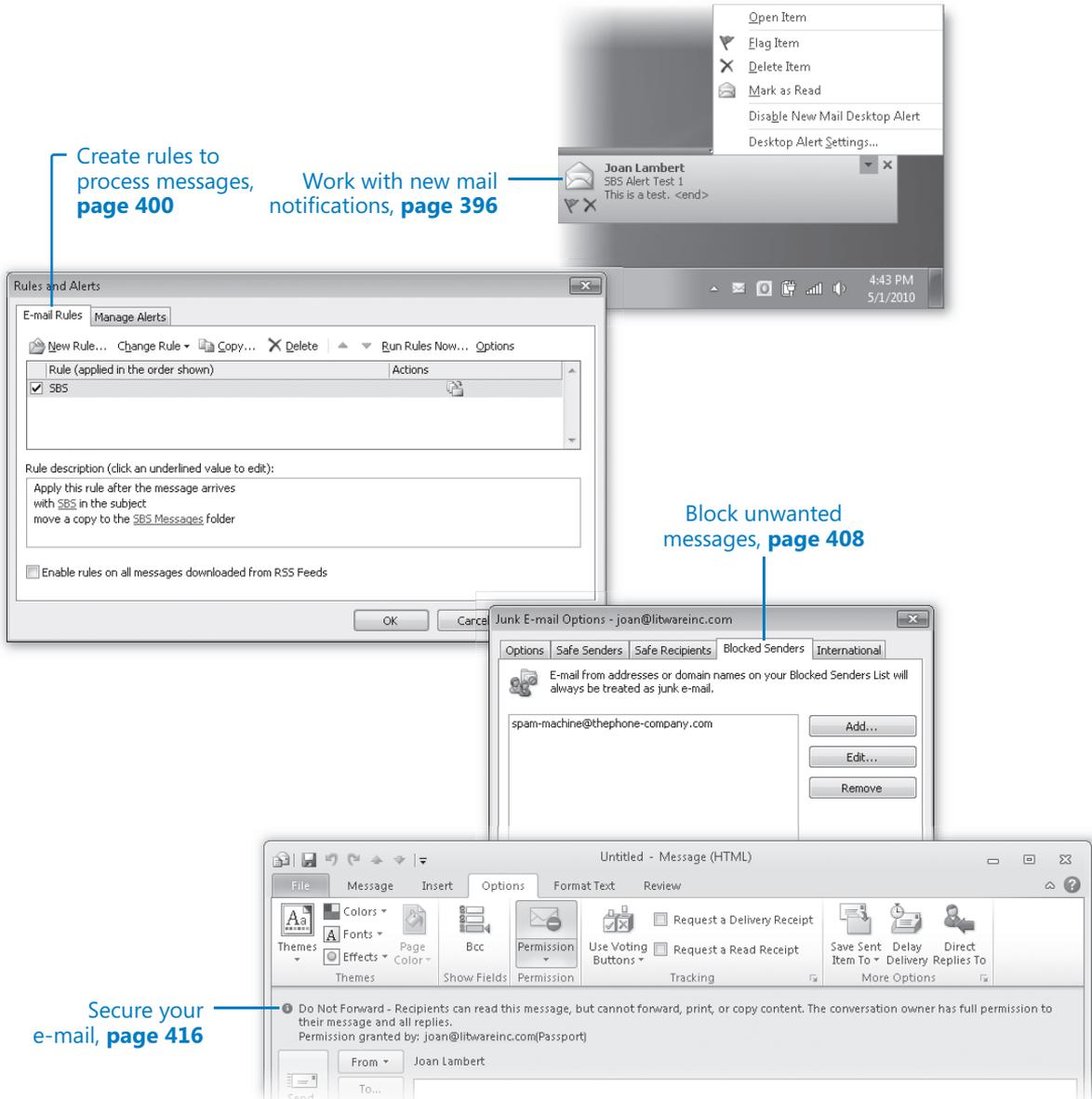
Chapter at a Glance

Create rules to process messages, [page 400](#)

Work with new mail notifications, [page 396](#)

Block unwanted messages, [page 408](#)

Secure your e-mail, [page 416](#)



11 Manage E-Mail Settings

In this chapter, you will learn how to

- ✓ Work with new mail notifications.
 - ✓ Create rules to process messages.
 - ✓ Block unwanted messages.
 - ✓ Secure your e-mail.
-

To more easily manage the information you receive through e-mail, you can specify how Microsoft Outlook 2010 alerts you to and processes incoming messages. You can also take advantage of the many security features built into Outlook 2010 to keep your outgoing communications secure and to protect your computer system from spam, viruses, Web beacons, and other modern electronic threats.

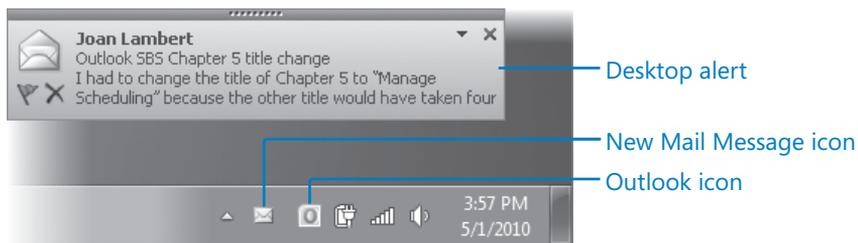
In this chapter, you'll learn how to maintain your information in Outlook in a secure and organized fashion. First you'll work with new mail notifications. You'll process incoming messages by using rules, and set up the Junk E-mail Filter to manage unwanted messages. Finally, you'll learn about ways of ensuring that your e-mail communications are secure.

Practice Files The exercises in this chapter use Outlook items you created in exercises in previous chapters. If an exercise requires an item that you don't have, you can complete the exercise in which you create the item before beginning the exercise, or you can substitute a similar item of your own. A complete list of practice files is provided in "Using the Practice Files" at the beginning of this book.

Working with New Mail Notifications

When new messages, meeting requests, or task assignments arrive in your Inbox, Outlook alerts you in several ways so that you can be aware of e-mail activity if you are using another application or if you've been away from your computer.

- A New Mail Message icon appears in the notification area at the right end of the Windows Taskbar.
- A semi-transparent desktop alert appears on your screen for a few seconds, displaying the name of the sender, the subject, and the first few words of the message (approximately 125 characters).



From the desktop alert, you can open a message, mark it as read, flag it for action, respond to it, or delete it.

You can change the location, transparency, and length of time desktop alerts appear, or you can choose not to display them.

- You can position the alert inside or outside of the Outlook program window. For example, if you usually work with the taskbar hidden, you might want to position the alert away from the taskbar to prevent you from accidentally displaying the taskbar each time you point to an alert.
- The alert can be a solid color or up to 80 percent transparent. The default is 20 percent transparent. You might find that transparent alerts are less likely to interfere with your view of the work you're doing.
- The alert can stay on the screen for from 3 to 30 seconds. The default is 7 seconds.
- If Outlook is minimized or another application window is active, a chime sounds. You can change the sound or turn it off.
- The mouse pointer briefly changes shape, from an arrow to an e-mail message, and back. You can turn off this feature.

You can customize and turn off these notifications.

In this exercise, you'll customize your desktop alert settings and process messages by using desktop alerts as you receive them.



SET UP You don't need any practice files to complete this exercise. Display your Outlook Inbox, and then follow the steps.

1. Display the Backstage view, and then in the left pane, click **Options**.
The Outlook Options dialog box opens.
2. In the left pane of the **Outlook Options** dialog box, click **Mail**.
3. Scroll down the **Mail** page of the **Outlook Options** dialog box to display the **Message arrival** section.

From this section, you can customize the ways in which Outlook alerts you to the arrival of a new message.



You can stop desktop alerts from appearing by clearing the *Display A Desktop Alert* check box.

4. In the **Message arrival** section, click **Desktop Alert Settings**.

The Desktop Alert Settings dialog box opens.



You can set the duration and transparency for desktop alerts.

Tip To quickly access the **Desktop Alert Settings** dialog box, when a desktop alert appears, click the **Options** button in the alert, and then click **Desktop Alert Settings**. You can turn off desktop alerts by clicking the **Options** button and then clicking **Disable New Mail Desktop Alert**.

5. Drag the **Duration** slider to the left end of the slider bar to set it to **3 seconds**, and then click **Preview**.

A semi-transparent sample desktop alert appears in the lower-right corner of your desktop and fades away after three seconds.



You can preview the effects of changing the desktop alert settings.

6. Click **Preview** again, and when the alert appears, point to it.
The semi-transparent alert becomes solid. As long as the mouse pointer is positioned over the alert, it remains visible.
7. Drag the sample desktop alert to the upper-right corner of your screen.
Future desktop alerts will appear wherever you move the sample alert.
8. In the **Desktop Alert Settings** dialog box, drag the **Transparency** slider to the left end of the slider bar to set it to **0%** transparent, and then click **Preview**.
The sample desktop alert appears in the upper-right corner of the screen and its transparency lessens until it is opaque.
9. Move the desktop alert to the position at which you want it to appear in the future. Then experiment with the options in the **Desktop Alert Settings** dialog box and set the duration and transparency as you want, previewing your changes as necessary.
10. When you're done, click **OK** in the **Desktop Alert Settings** dialog box, and click **OK** in the **Outlook Options** dialog box.
11. On the **Home** tab, in the **New** group, click the **New E-mail** button.
A new message window opens.
12. Enter your e-mail address in the **To** box, and then in the **Subject** box, type **SBS Alert Test 1**.



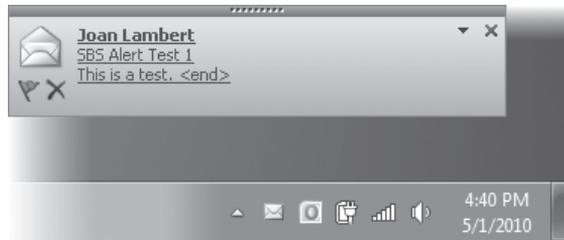
Important The subject of each message we instruct you to send to yourself while working through the exercises in this book begins with **SBS** so that you can easily differentiate the practice files from other messages in your **Inbox** and **Sent Items** folders.

13. In the message body, type **This is a test**. Then send the message.

When the message arrives in your Inbox, the New Mail Message icon appears in the notification area at the right end of the taskbar, and a desktop alert appears on your screen.

14. When the desktop alert appears, point to (but don't click) its message text.

The message sender, subject, and text are underlined.

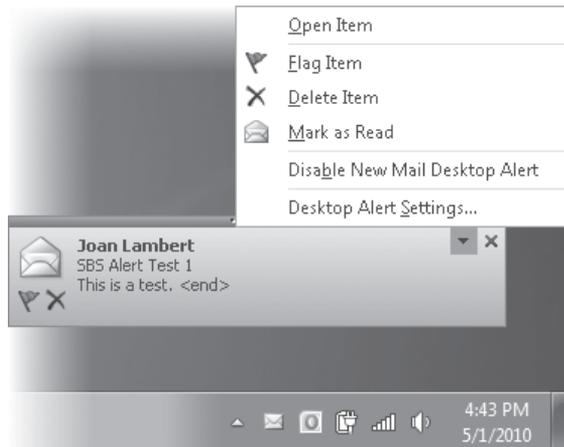


You can click the underlined text in the desktop alert to open the message in a message window.



15. In the desktop alert, click the **Options** button.

A menu of options appears.



You can process an incoming message from a desktop alert without switching to Outlook.

16. On the **Options** menu, click **Mark as Read**.

The desktop alert closes, and in your Inbox, the message corresponding to the desktop alert is marked as read (whether or not the Inbox is visible).



17. On the **Home** tab, in the **New** group, click the **New Items** button, and then in the list, click **Meeting**.

A new meeting window opens.

18. Enter your e-mail address in the **To** box, enter **SBS Alert Test 2** in the **Subject** box, and enter **My Inbox** in the **Location** box. Then send the meeting request. If a meeting reminder window opens, click **Dismiss**.

See Also For more information about meeting requests, see “Responding to Meeting Requests” in Chapter 5, “Manage Scheduling.”



19. When the desktop alert appears, point to it, and then click the **Delete Item** button.

The message corresponding to the desktop alert moves from your Inbox to the Deleted Items folder, and the desktop alert closes.

Tip If a meeting reminder window opens, click **Dismiss**.



CLEAN UP Retain the **SBS Alert Test 1** message in your Inbox for use in later exercises.

Tip When the Outlook icon is active in the notification area of the status bar, you can click it to access commands for controlling the display of various types of alerts: Microsoft Exchange Server messages, network warnings, network connectivity changes, and new mail desktop alerts.

The Outlook icon is not shown by default. To display it, click the Show Hidden Icons button at the left end of the notification area, click **Customize**, and then in the Notification Area Icons window of Control Panel, in the Microsoft Outlook list, click **Show Icon And Notifications**.

Creating Rules to Process Messages

You can have Outlook evaluate your incoming or outgoing e-mail messages and take various actions with them based on sets of instructions you set up, called *rules*. You can create rules based on different message criteria such as the message sender, message recipients, message content, attachments, and importance. By using rules, you can have Outlook automatically move, copy, delete, forward, redirect, reply to, or otherwise process messages based on the criteria you specify. You can choose from a collection of standard rules or create your own from scratch.

If you have an Exchange account, you can set up rules that are applied to messages as they are received or processed by your Exchange server, and you can set up rules that go into effect only when you indicate that you are unavailable, by setting up an Automatic Reply. Whether or not you have an Exchange account, you can set up rules that are applied to messages stored on your computer.

Tip You cannot use Outlook rules to filter messages sent to an Internet e-mail account.

See Also For information about setting up Outlook to automatically respond to and process messages when you are unavailable, see “Automatically Replying to Messages” in Chapter 12, “Work Remotely.”

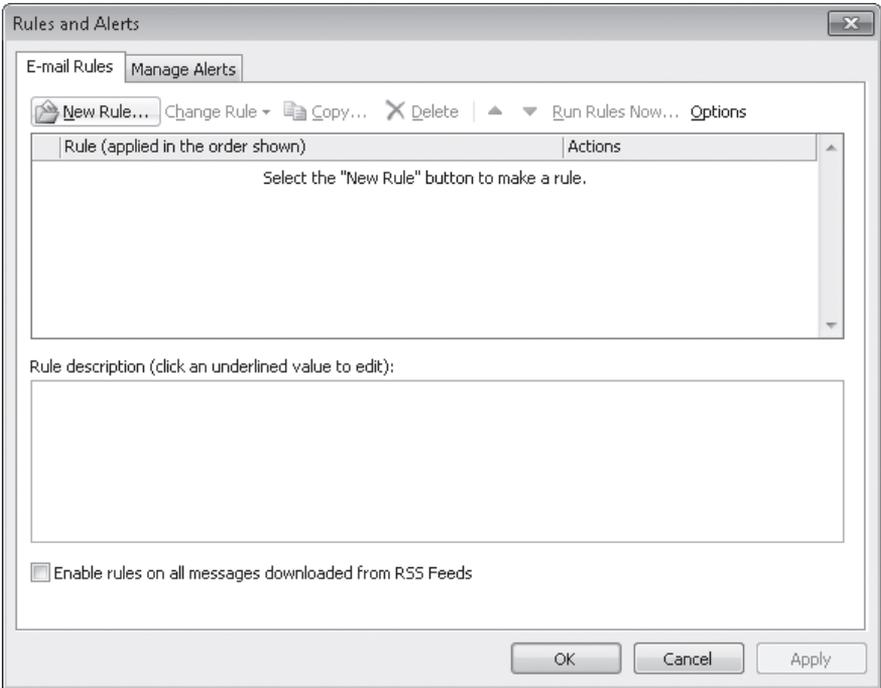
In this exercise, you’ll create a rule to process incoming messages that meet specific criteria.



SET UP You need the SBS Alert Test 1 message you created in the preceding exercise and the contents of the SBS Messages folder you created in Chapter 7, “Organize Your Inbox.” If you have not already created the message or created and populated the folder, you can do so now, or you can substitute any messages in your Inbox and adjust the rule criteria accordingly. Display your Outlook Inbox, and then follow the steps.

1. On the **Info** page of the Backstage view, click the **Manage Rules & Alerts** button.

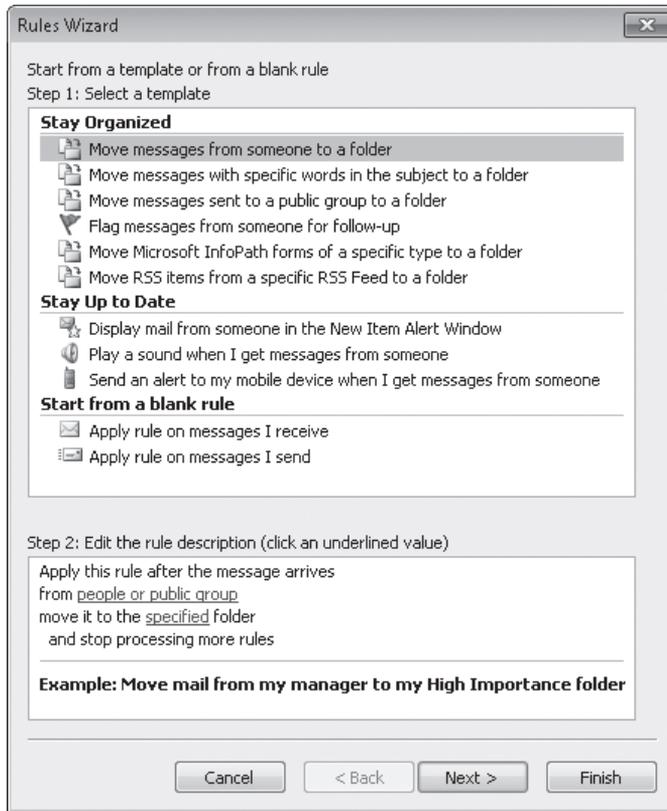
The Rules And Alerts dialog box opens, displaying the E-mail Rules page.



Your organization might have server-based rules that are not displayed in this dialog box.

2. On the **E-mail Rules** page, click **New Rule**.

The Rules Wizard starts.



The wizard leads you through the steps of creating a rule.

You can base a rule on one of the nine rule templates provided by Outlook, or you can start from a blank rule for incoming or outgoing messages.

3. In the **Select a template** box, click each of the rule templates in the **Stay Organized** and **Stay Up to Date** lists.

The criteria and actions associated with the selected rule appear in the Edit The Rule Description box.

Tip The name of the large box begins with *Step 1*. This text remains at the beginning of the name as the wizard leads you through a series of steps. We therefore refer to the box by the descriptive name that follows.

4. In the **Start from a blank rule** list, click **Apply rule on messages I receive**.

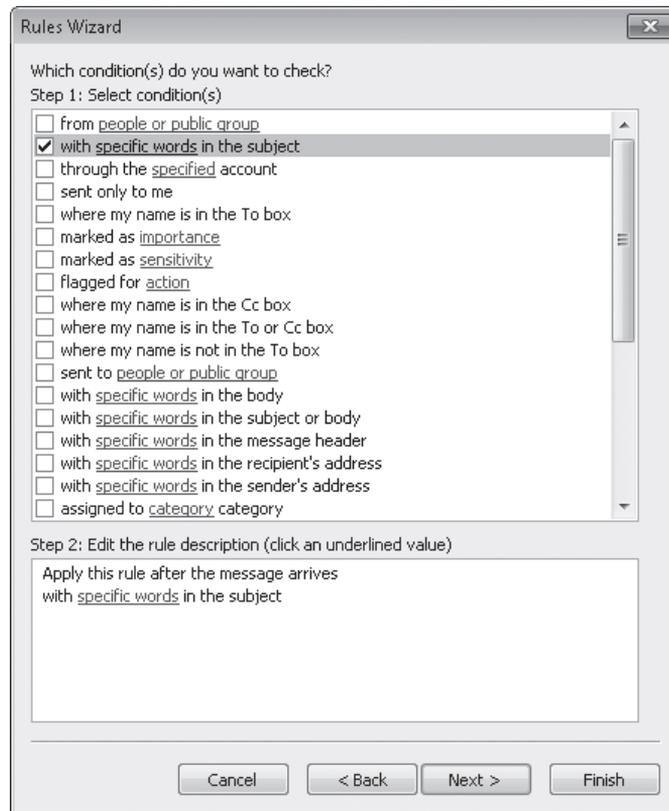
This basic information appears in the Step 2 box.

5. In the **Rules Wizard**, click **Next**.

The Step 1 box changes to display a list of conditions that you can apply to incoming messages.

6. In the **Select condition(s)** box, scroll down the list to see the conditions you can apply. Then select the **with specific word(s) in the subject** check box.

Outlook adds the selected condition to the Edit The Rule Description box. You can specify as many conditions as you want.



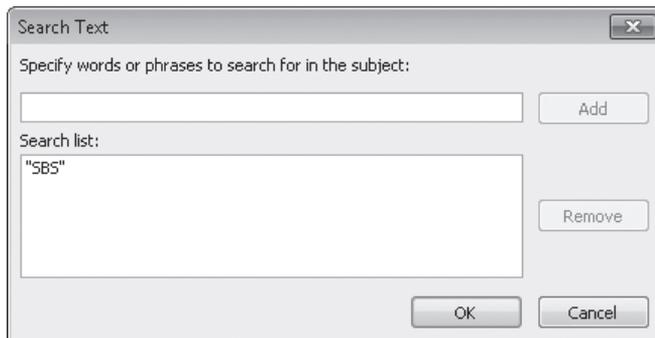
Outlook will apply the finished rule to incoming messages that meet the conditions you select.

7. In the **Edit the rule description** box, click the underlined term **specific words**.

The Search Text dialog box opens.

8. In the **Specify words or phrases to search for in the subject** box, enter **SBS**. Then click **Add**.

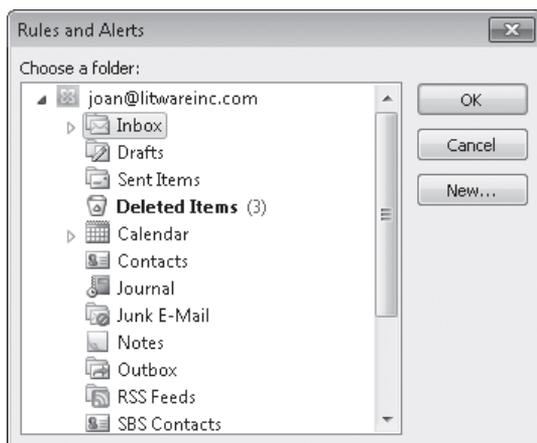
The specified term is enclosed in quotation marks and moves to the Search List box.



The rule will apply to messages with subjects that include any of the specified search terms.

9. In the **Search Text** dialog box, click **OK**. Then in the **Rules Wizard**, click **Next**. The Step 1 box changes to display a list of actions that can be performed on incoming messages.
10. Scroll through the **Select action(s)** list to review the actions Outlook can perform on incoming items that meet the criteria you specify. Then select the **move a copy to the specified folder** check box, and in the **Edit the rule description box**, click the underlined word **specified**.

The Rules And Alerts dialog box opens, displaying the folders in your mailbox.



You can choose an existing folder or create a new folder directly from the dialog box.

- ▶ **11.** In the **Rules and Alerts** dialog box, click the **Expand** button to the left of the **Inbox**, click the **SBS Messages** folder, and then click **OK**.

Troubleshooting If you didn't create the **SBS Messages** folder in an earlier exercise, click **Inbox** in the **Choose A Folder** list, click **New**, enter **SBS Messages** as the folder name in the **Create New Folder** dialog box, and then click **OK**.

- 12.** In the **Rules Wizard**, click **Next**.

The Step 1 box changes to display a list of exceptions you can specify that will cause Outlook not to apply the rule to messages that meet the selected conditions.

Rules Wizard

Are there any exceptions?
Step 1: Select exception(s) (if necessary)

- except if from people or public group
- except if the subject contains specific words
- except through the specified account
- except if sent only to me
- except where my name is in the To box
- except if it is marked as importance
- except if it is marked as sensitivity
- except if it is flagged for action
- except where my name is in the Cc box
- except if my name is in the To or Cc box
- except where my name is not in the To box
- except if sent to people or public group
- except if the body contains specific words
- except if the subject or body contains specific words
- except if the message header contains specific words
- except with specific words in the recipient's address
- except with specific words in the sender's address
- except if assigned to category category

Step 2: Edit the rule description (click an underlined value)

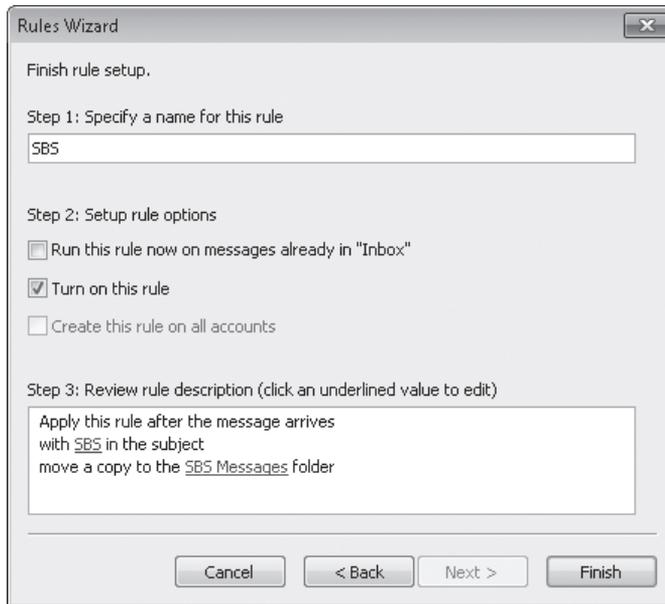
Apply this rule after the message arrives
with SBS in the subject
move a copy to the SBS Messages folder

Cancel < Back Next > Finish

Exceptions you specify on this page overrule the conditions specified previously.

13. In the **Rules Wizard**, without selecting an exception, click **Next**.

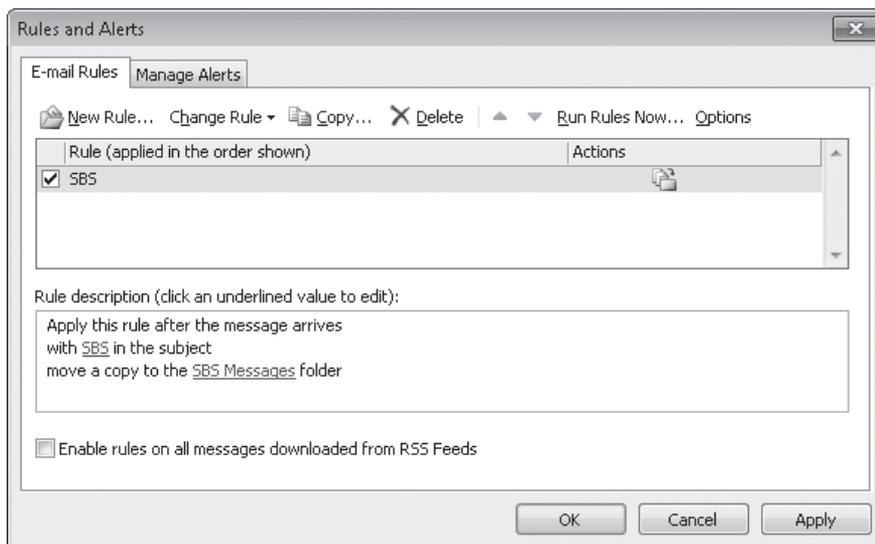
The final page of the Rules Wizard summarizes the parameters of the SBS rule.



You can review the specified criteria and actions.

14. Select the **Run this rule now...** check box, and then click **Finish**.

Outlook runs the rule on the contents of your Inbox and then saves the rule in the Rules And Alerts dialog box.

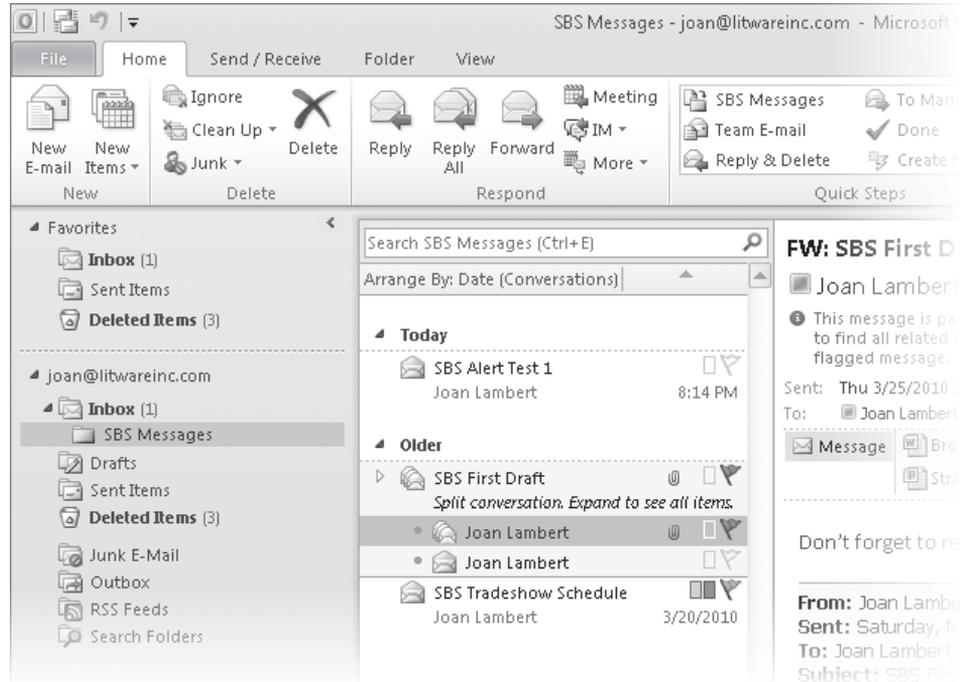


All the rules you've created appear in this list, whether or not they're turned on.

The selected check box to the left of the rule name indicates that this rule is active and that Outlook will apply it to all incoming messages.

15. In the **Rules and Alerts** dialog box, click **OK**.
16. Click the **Home** tab. In the **Navigation Pane**, expand the **Inbox** if necessary, and then click the **SBS Messages** folder.

The folder contains practice messages you created in earlier chapters of this book, as well as the SBS Alert Test 1 message you created in the preceding exercise.



The SBS Alert Test 1 message has been moved from your Inbox to the specified folder.

Troubleshooting The appearance of buttons and groups on the ribbon changes depending on the width of the program window or item window. For information about changing the appearance of the ribbon to match our screen images, see “Modifying the Display of the Ribbon” at the beginning of this book.

CLEAN UP Retain the SBS Messages folder and its contents for use in later exercises.

Blocking Unwanted Messages

Outlook offers levels of protection for managing junk e-mail messages (also called spam)—the unsolicited advertisements, sometimes containing dangerous attachments, that can swamp your Inbox if your e-mail address finds its way into the hands of unscrupulous mailing list vendors. When enabled, the Junk E-Mail Filter either moves messages that appear to be junk e-mail to a special folder or deletes them. You can specify a list of e-mail addresses or domains whose messages should always be treated as junk; you can also specify a list of e-mail addresses or domains from whom messages should never be treated as junk.

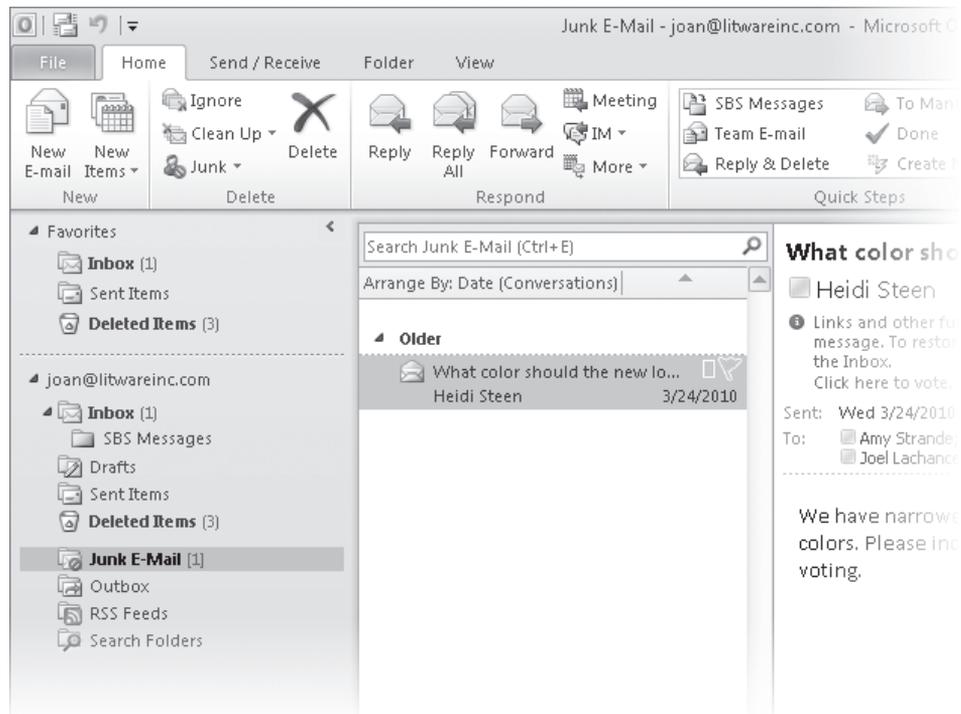
Outlook also offers protection from phishing—a widespread identity theft scam. Phishing messages are e-mail messages that contain links to phishing sites purporting to represent trusted, known entities, such as banks or e-commerce sites that would likely have your personal information on file. The messages request that you update your personal information through the link provided. If you do so, you inadvertently provide the requested information (which might include your social security number, bank account number, passwords, and other confidential information) to scam artists, who might then sell or otherwise use the information for their own financial gain. In the past, you were in danger only if you submitted your information through the phishing site, but these sites are becoming increasingly sophisticated, and many now host malicious keystroke-logging software. You can infect your computer just by visiting such sites, which makes it vital that you protect yourself from these threats.

See Also [Windows Internet Explorer 8 provides built-in protection against phishing sites. For more information, refer to *Windows 7 Step by Step*, by Joan Lambert Preppernau and Joyce Cox \(Microsoft Press, 2009\).](#)

Working with Junk E-Mail Messages

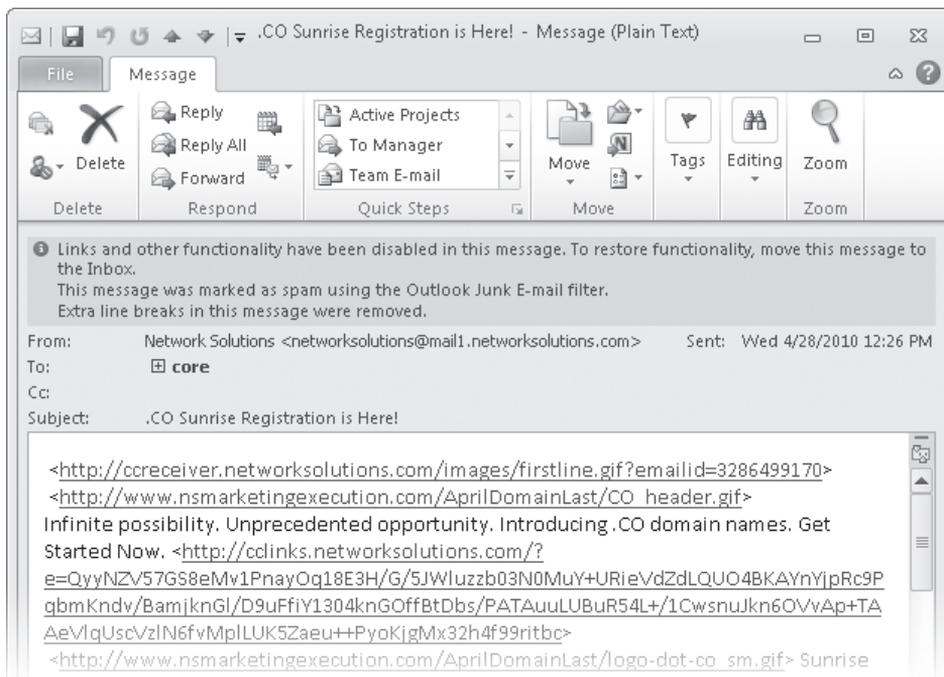
By default, when Outlook receives a message that it deems to be either junk mail or a phishing message, it delivers that message to the Junk E-Mail folder associated with your account rather than to your Inbox. (Each account you configure Outlook to connect to has its own Junk E-Mail folder.) You might not be aware that one or more messages has been redirected to your Junk E-mail folder; if someone tells you that he or she has sent you a message but you haven't received it, it's good idea to check whether it's in your Junk E-Mail folder.

You can display the contents of the Junk E-mail folder by clicking Junk E-Mail in the folder list of your account, in the Navigation Pane. When the Junk E-Mail folder contains one or more messages, the folder name is bold, and the number of messages in the folder is shown in parentheses at the end of the folder name. This is similar to the way that your Inbox folder name appears when the Inbox contains unread messages, but in this case, the bold formatting is not linked to the read status of the message.



Bold formatting indicates that the Junk E-Mail folder contains one or more messages.

When you open a message from the Junk E-Mail folder, Outlook converts the message content to plain text and disables any active links or content within the message. The information bar in the message header provides specific information about the message's status. Suspected junk e-mail messages have orange information bars; suspected phishing messages have pink information bars.



Outlook disables functionality in a message that it suspects to be spam.

Any remote graphics (graphics that are displayed from Internet locations rather than embedded in the message—sometimes called Web beacons) that were present in the message are converted to URLs so you can easily see where the graphics originated.

See Also For more information about Web beacons, see “Blocking External Content to Protect Your Privacy” later in this chapter.

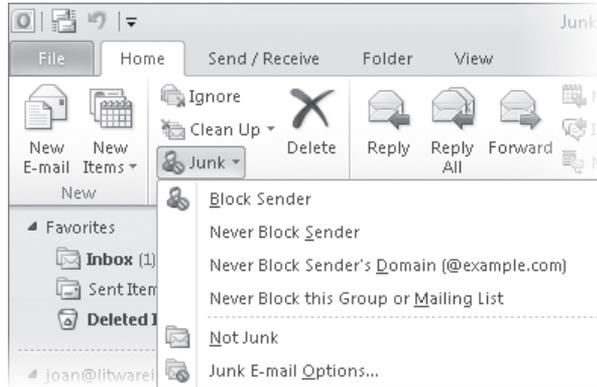
Although the response options on the ribbon are active, you can’t reply to a message from the Junk E-Mail folder—you must first move it to the Inbox or another folder. You can forward a message from the Junk E-Mail folder; you might want to forward a message to someone else who can verify for you whether the message is valid. The forwarded message will be in plain-text format rather than the original message format.

You can delete messages from the Junk E-Mail folder or indicate to Outlook how you would like the Junk E-mail filter to handle similar messages in the future.

To process a message from the Mail pane of the Junk E-Mail folder:

1. In the Mail pane, select the message you want to process.
2. On the Home tab, in the Delete group, click the Junk button.

The Junk list displays your options for processing the message.



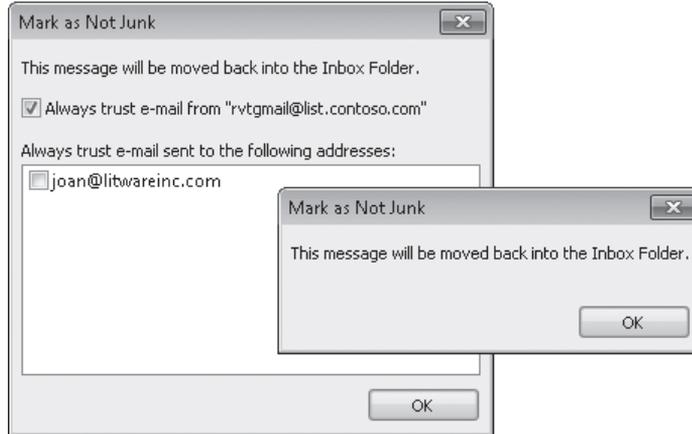
You can configure Outlook to block or allow specific senders.

3. Click one of the first four options to block the sender or to add the sender, the sender's domain, or the recipient group to your Safe Senders or Safe Recipients list.

Clicking an option does not remove the message from the Junk E-Mail folder.

4. To move the message to your Inbox, click Not Junk.

The Mark As Not Junk message box opens.



The dialog box might look different, depending on your Outlook e-mail account configuration.

5. If you do not want to move the message to the Inbox, click the Close button. Otherwise, select one or both of the Always Trust check boxes, and then click OK.
 - Selecting the Always Trust E-mail From check box adds the message sender to your Safe Senders list.
 - Selecting a check box in the Always Trust E-mail Sent To The Following Addresses box adds that message recipient to your Safe Recipients list.

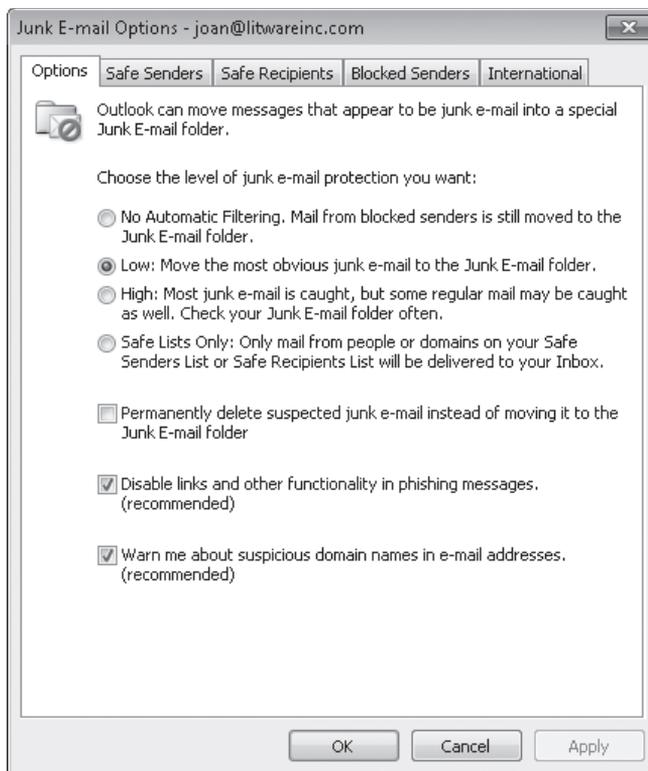
To process an open message, click the Junk button in the Delete group on the Message tab of the message reading window, and then click the option you want.

Configuring Junk E-Mail Options

You manage junk mail settings from the Junk E-mail Options dialog box, which you open by clicking Junk E-mail Options in the Junk list. You set specific junk e-mail processing options for each account to which Outlook is configured to connect. The account for which you're configuring options is shown in the title bar of the Junk E-mail Options dialog box.

The Junk E-mail Options dialog box has five pages.

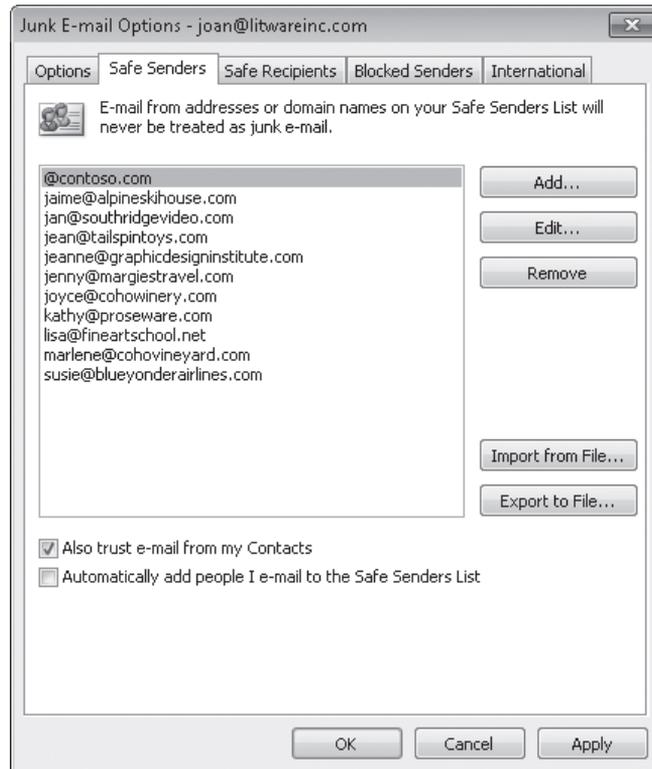
- On the Options page, you select a level of protection. If you don't have additional filters in place, such as those that might be supplied by your organization, you might prefer to click High. Otherwise, click Low.



The Options page of the Junk E-Mail Options dialog box.

If you want Outlook to automatically delete suspected junk e-mail, select the Permanently Delete Suspected Junk E-Mail Instead Of Moving It To The Junk E-Mail Folder check box. Do not select this check box if you set the protection level to High or to Safe Lists Only. With these settings, it is likely that the Junk E-Mail Filter will catch quite a few valid messages that you don't want deleted. Note that the Disable Links And Other Functionality In Phishing Messages check box is selected by default. Unless you are very confident that you have another protective system in place, leave this option selected.

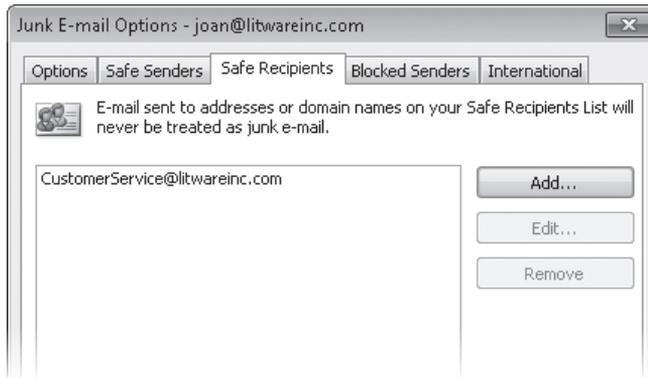
- On the Safe Senders page, you can add a specific person's e-mail address to the Safe Senders list (for example, *tom@contoso.com*) or specify that e-mail received from any sender at a particular domain is safe by adding only the domain (for example, *@contoso.com*).



The Safe Senders page of the Junk E-Mail Options dialog box.

To ensure that messages from your legitimate contacts aren't moved to the Junk E-mail folder by the Junk E-Mail Filter, select the Also Trust E-mail From My Contacts and Automatically Add People I E-mail To The Safe Senders List check boxes.

- On the Safe Recipients page, you can add distribution lists or mailing lists of which you are a member to your Safe Recipients List to ensure that messages sent to you through the distribution list or mailing list will never be treated as junk e-mail.



The Safe Recipients page of the Junk E-Mail Options dialog box.

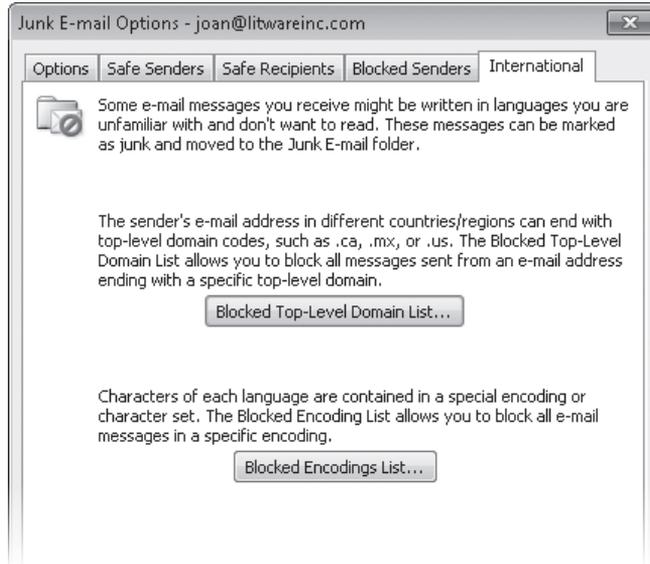
- On the Blocked Senders page, you can manually add e-mail addresses and domain names to the Blocked Senders list, or Outlook will add them for you whenever you identify a received message as junk e-mail.



The Blocked Senders page of the Junk E-Mail Options dialog box.

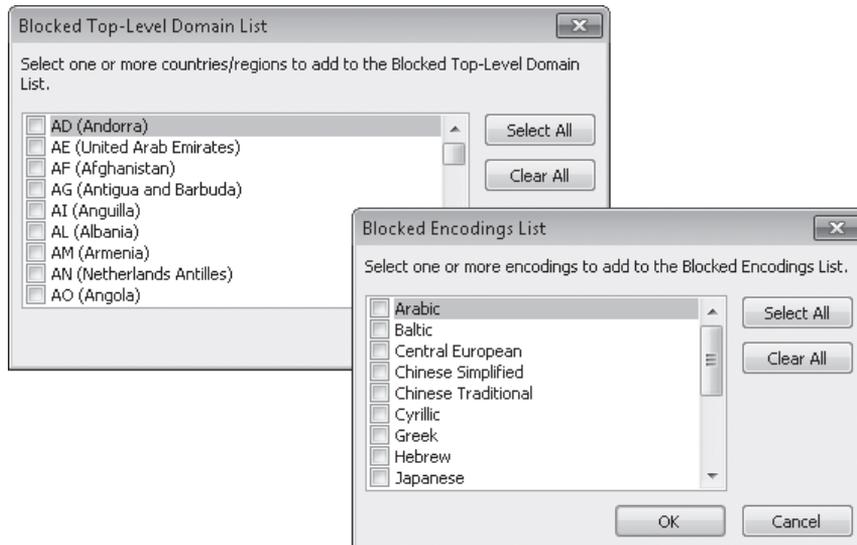
Tip To add the sender or recipient of a message to one of your Junk E-Mail lists, right-click the message in your Inbox or other mail folder, click Junk, and then click Block Sender, Never Block Sender, Never Block Sender's Domain, or Not Junk.

- On the International page, you have the option of blocking all messages from a country-specific, top-level domain, or all messages containing specific non-English text encoding.



The International page of the Junk E-Mail Options dialog box.

Click Blocked Top-Level Domain List to access the list of top-level domains you can block. Click Blocked Encodings List to access the list of languages you can block.



You can block entire country-specific and language-specific groups of messages.

Securing Your E-Mail

As your e-mail messages travel from server to server en route to you or other message recipients, they are vulnerable to interception by hackers and others who are intent on viewing them. With Outlook 2010, you can safeguard your messages in several ways, including implementing digital signatures, encryption, plain text messages, and Information Rights Management (IRM). In certain corporate environments, particularly those that handle sensitive data such as legal and accounting firms, specific e-mail security procedures might be mandated and enforced. In the absence of such guidance, only you can decide whether any of these additional security measures are appropriate for your situation.

Digital Signatures

When sending messages, you can reassure message recipients that they are receiving valid messages from you by using a digital signature—a piece of code that validates the identity of a message sender (not the actual person, but the e-mail account and computer from which the message originates).

Obtaining a Digital ID

To send digitally signed or encrypted messages over the Internet, you must obtain a digital ID from an independent certification authority. The first time you try to digitally sign or encrypt a message without having a valid digital ID installed on your computer, Outlook prompts you to obtain one. If you prefer, you can obtain one before you need it.

Obtaining some types of digital IDs, such as those used to certify the source of software programs, involves a stringent application process that can take weeks to complete. However, applying for a digital ID to certify documents and e-mail messages is a relatively simple process. You can have more than one digital ID on your computer, and you can select which one to use for each document or message. For example, you might have one digital ID for business use and one for personal use.

If you have an Exchange account, your Exchange administrator may be able to issue you a digital ID. Otherwise, you'll need to get one independently. Many U.S. and international certification companies offer digital IDs to certify e-mail. You'll probably be most comfortable purchasing a certificate in your native currency. Regardless of where you obtain it, your digital ID is valid worldwide.

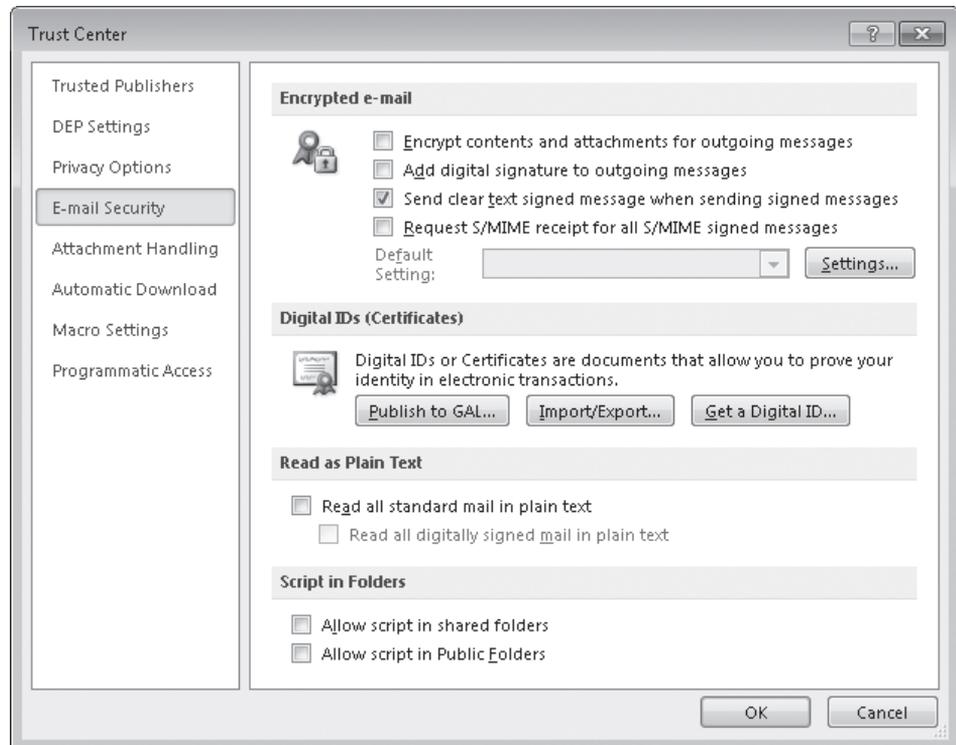
To obtain a digital ID to sign or encrypt documents and messages:

1. On the Trust Center page of the Outlook Options dialog box, click Trust Center Settings.

The Trust Center dialog box opens.

2. In the left pane, click E-mail Security.

From this page you can configure many of the settings we discuss in this topic.



The Publish To GAL (Global Address List) button is available only in a centrally administered Exchange environment.

3. In the Digital IDs (Certificates) area of the E-mail Security page, click Get A Digital ID.

The Microsoft Office Online Web site opens in your default Web browser, listing providers from whom you can obtain a digital ID to certify documents and e-mail messages.

Tip If you want to use a certification authority other than one of those recommended by Microsoft, search the Web for *digital ID* or *certification authority*, and you'll find a number of options. You can apply for a digital ID from any certification authority through its Web site. Digital IDs from non-recommended providers might have compatibility issues with Windows Internet Explorer, so if you use Internet Explorer and you want to be certain you won't run into problems, use one of the recommended providers.

4. Click the link at the end of a provider's description to display the provider's Web site.
5. Follow the instructions on the Web site to register for a digital ID.

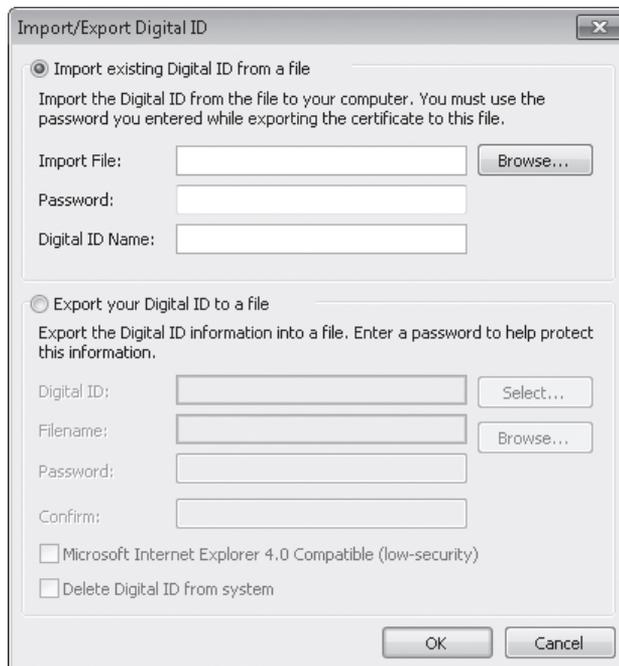
Some certifying authorities charge a small fee, but most offer free digital IDs or a free trial period. As part of the process, you'll likely be required to respond to an e-mail message from your computer.

Your digital ID will be installed on the computer on which you complete the application process, but it is associated with your e-mail address; if you need to use it on another computer, you can reinstall it from the provider's site, or you can export the digital ID files from the original computer and import them on the other computer.

To export or import a digital ID:

1. Display the E-mail Security page of the Trust Center dialog box.
2. In the Digital IDs (Certificates) area of the E-mail Security page, click Import/Export.

The Import/Export Digital ID dialog box opens.



You can import and use any digital ID that is associated with your e-mail address.

3. In the Import/Export Digital ID dialog box, select whether you want to import or export your digital ID, provide the appropriate information, and then click OK.

Tip You can also import a digital ID from the Certificates page of a contact record window. For information, see “Working in the Contacts Module” in Chapter 2, “Explore the Outlook Windows.”

Digitally Signing Messages

You can digitally sign individual messages when you compose them, or you can instruct Outlook to digitally sign all outgoing messages.

The first time you digitally sign a message, you need to configure your security settings to use your digital certificate. You must do this from the Trust Center dialog box.

Troubleshooting You can follow a similar process to configure security settings from the message window, but there appears to be a bug in the system that results in this not working—so be sure to follow the Trust Center process.

To configure digital certificate settings, follow these steps:

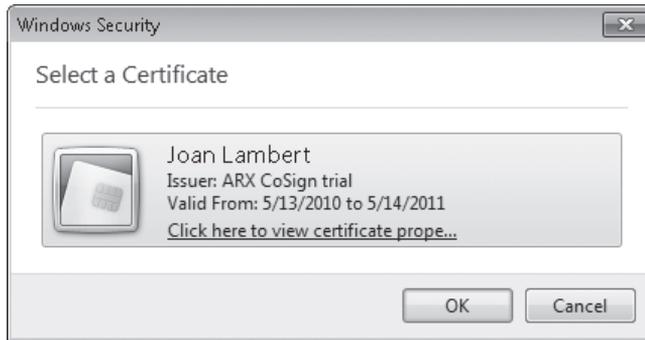
1. Display the E-mail Security page of the Trust Center dialog box.
2. To the right of the Default Setting box, click Settings.

The Change Security Settings dialog box opens.

You need to specify digital signing and encryption certificates.

- In the Change Security Settings dialog box, to the right of the Signing Certificate box, click Choose.

The Windows Security dialog box opens.



The dialog box displays the digital signing certificates available on your computer.

- In the Windows Security dialog box, click the digital certificate you want to use to digitally sign outgoing messages, and then click OK.

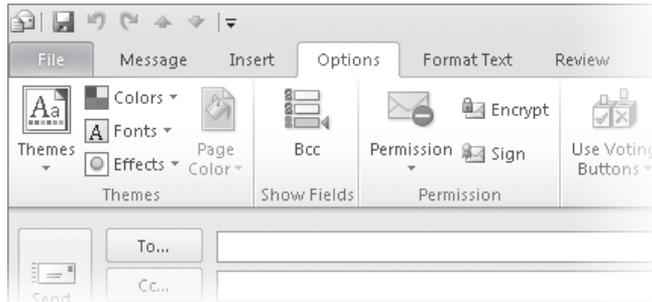
The selected certificate information appears in the Change Security Settings dialog box.



By default, Outlook also assigns the selected certificate for message encryption.

5. In the Security Settings Name box, enter a name by which you'll identify the signing certificate. Then click OK in the Change Security Settings dialog box, in the Trust Center dialog box, and in the Outlook Options dialog box.

After you complete this process, the Digital Signature and Encryption buttons appear in the Permission group on the Options tab of the message composition window.



By default, Outlook also assigns the selected certificate for message encryption.

To digitally sign an individual e-mail message:

- On the Options tab, in the Permission group, click the Digitally Sign Message button.

A message with a valid digital signature has a red ribbon on its message icon and a digital signature icon (also a red ribbon) in its message header. When you receive a digitally signed message, you can click the digital signature icon to view information about the signature.

To digitally sign all outgoing messages:

1. Display the E-mail Security page of the Trust Center dialog box.
2. In the Encrypted E-mail area of the E-mail Security page, select the Add Digital Signature To Outgoing Messages check box.
3. If all your message recipients don't have Secure Multipurpose Internet Mail Extensions (S/MIME) security (for instance, if you're sending messages to people who you know aren't using Outlook), ensure that the Send Clear Text Signed Message When Sending Signed Messages check box is selected (this is the default setting).

Encryption

You can secure the contents of outgoing messages by using encryption. Encryption ensures that only the intended recipients can read the messages you send. The message recipient's e-mail program must have corresponding decryption capabilities in order to read the message.

You can encrypt individual messages when you compose them, or you can instruct Outlook to encrypt all outgoing messages.

To encrypt an individual message:

- On the Options tab, in the Permission group, click the Encrypt button.

Troubleshooting If you haven't previously used the Encryption feature in Outlook 2010, the Encrypt Message Contents And Attachments button might not be visible. If this is the case, click the More Options dialog box launcher on the Options tab, and then in the Properties dialog box, click Security Settings. In the Security Properties dialog box, select the Encrypt Message Contents And Attachments check box, and click OK. Then close the Properties dialog box.

To encrypt all outgoing messages:

1. Display the E-mail Security page of the Trust Center dialog box.
2. In the Encrypted E-mail area of the E-mail Security page, select the Encrypt Contents And Attachments For Outgoing Messages check box.
3. To receive verification that a message recipient received an encrypted message in its encrypted format, select the Request S/MIME Receipt For All S/MIME Signed Messages check box.

An encrypted message has a blue lock on its message icon and an encryption icon (also a blue lock) in its message header. When you receive an encrypted message, you can click the encryption icon to view the message security settings.

Tip If you try to send an encrypted message from Outlook to a recipient whose e-mail configuration doesn't support encryption, Outlook notifies you and gives you the option of resending the message in an unencrypted format.

Plain Text Messages

These days, viruses and other harmful programs can easily be spread from computer to computer through active content embedded in or linked to from e-mail messages. To ensure that the e-mail messages you receive won't harm your computer, you might want to display them in plain text, rather than in Rich Text Format or HTML. Links, scripts, and other active content are disabled in plain text messages.

To receive all messages in plain text format:

1. Display the E-mail Security page of the Trust Center dialog box.
2. In the Read As Plain Text area of the E-mail Security page, select the Read All Standard Mail In Plain Text check box, and then click OK.

Information Rights Management

If you don't want a message recipient to forward, copy, or print your message, you can send it with restricted permissions. You use Information Rights Management (IRM) to set these permissions, which control who can read your messages and what they can do with them. If the restricted message includes an attachment, such as a Microsoft Word document, an Excel workbook, or a PowerPoint presentation, the recipient can't edit, copy, or print the attachment (unless you have set individual permissions to allow those actions within the document).

To use IRM, you need access to an IRM server. If your organization has its own IRM server, your administrator can advise you how to set restricted permissions. If you don't have access to an IRM server, Outlook prompts you to sign up for a free trial on an IRM server provided by Microsoft the first time you try to set permissions for a message.



You can use the Microsoft IRM service if your organization doesn't have an internal IRM server.

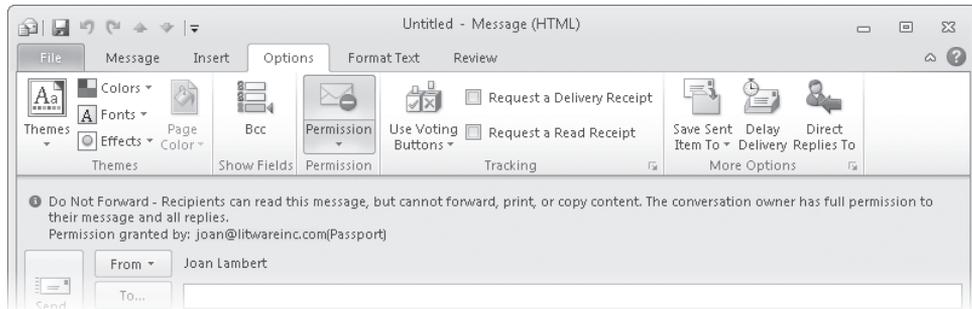
To take advantage of this free trial, you click Yes in the Service Sign-Up dialog box and then sign up for a Rights Management (RM) account certificate for your outgoing e-mail address (which must be registered as a Windows Live ID). The certificate is valid for six months. After finishing the sign-up process, you can restrict permissions for outgoing messages sent from the computer on which the certificate is installed.

Tip Registering your e-mail address as a Windows Live ID provides you with the credentials necessary to sign in to many sites and services provided by Microsoft and other companies. To register your e-mail address as a Windows Live ID, visit home.live.com.

To prevent message recipients from forwarding, printing, or copying a message:

- On the Options tab, in the Permission group, click the Permission arrow, and then in the list, click Do Not Forward.

The information bar in the message header of the outgoing and received messages indicates what recipients can and can't do with the message.



You can restrict the ways in which message recipients can share message content with other people.

To read a message sent with restricted permissions, recipients must have Outlook 2010, Outlook 2007, or Outlook 2003.

Blocking External Content to Protect Your Privacy

E-mail is increasingly used to deliver marketing information to customers and potential customers. Many companies include pictures in their marketing messages to help explain their product or to make the message more attractive and noticeable, but these pictures can make e-mail messages large. To avoid this problem, some companies include links to pictures that are hosted on their server. When you preview or open the message, you can see the pictures, but they aren't actually part of the message.

Some junk mail senders are using this technology to include Web beacons in their messages. Web beacons are small programs that notify the sender when you read or preview the e-mail message. The notification confirms that your e-mail address is valid, and as a result, you might receive more junk e-mail.

To help protect your privacy, Outlook includes features that block external content such as pictures, sounds, and Web beacons. In addition to helping ensure your privacy, this blocking technique can save bandwidth resources, because you choose whether to download images and sounds, rather than downloading them automatically when you open a message.

By default, Outlook 2010 blocks external content to and from all sources except those defined in the Safe Senders list and Safe Recipients list. When you open or preview a message that contains blocked content, an information bar in the message header provides options for handling the blocked content.

To view the blocked content in an individual e-mail message:

- In the message header, click the information bar, and then click Download Pictures.

To change the way Outlook handles external content:

1. Display the Automatic Download page of the Trust Center dialog box.
2. Select the check boxes for the options you want, which include:
 - Don't download pictures automatically in HTML e-mail messages or RSS items.
 - Permit downloads in messages from senders and to recipients defined in the Safe Senders and Safe Recipients Lists used by the Junk E-mail filter.
 - Permit downloads from Web sites in this security zone: Trusted Zone.
 - Permit downloads in RSS items.
 - Permit downloads in SharePoint Discussion Boards.
 - Warn before downloading content when editing, forwarding, or replying to e-mail.
3. Click OK to save your settings.

Under most circumstances, the security provided by the default settings far outweighs the slight inconvenience of manually downloading content you want to see or hear. You will probably find that many of the messages with blocked pictures are not of interest to you anyway, because they are generally marketing messages.

Key Points

- Outlook alerts you to new messages in several ways, all of which are customizable.
- You can set up rules so that Outlook can evaluate and process messages depending on the criteria you set.
- You can digitally sign your messages, encrypt them, and set permissions for them. You can also display messages in plain text to disable any active content.
- Built-in filters block annoying or hazardous messages that conform to typical spam patterns or that contain active content.

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