The quick way to learn Microsoft Outlook 2016!

This is learning made easy. Get more done quickly with Outlook 2016. Jump in wherever you need answers—brisk lessons and colorful screenshots show you exactly what to do, step by step.

- Get easy-to-follow guidance from a certified Microsoft Office Specialist Master
- Learn and practice new skills while working with sample content, or look up specific procedures
- Manage your email more efficiently than ever
- Organize your Inbox to stay in control of everything that matters
- Schedule appointments, events, and meetings
- Organize contact records and link to information from social media sites
- Track tasks for yourself and assign tasks to other people
- Enhance message content and manage email security

Download your Step by Step practice files from: http://aka.ms/outlook2016sbs/downloads

Microsoft Outlook 2016

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Contents

Introduction ................................................................. xiii
Who this book is for ................................................. xiii
The Step by Step approach ............................................. xiii
Download the practice files ......................................... xiv
Ebook edition ............................................................. xv
Get support and give feedback ...................................... xvi
  Errata and support .................................................... xvi
  We want to hear from you .......................................... xvi
  Stay in touch ........................................................... xvi

Part 1: Get started with Outlook 2016

Outlook 2016 basics ..................................................... 3
Start Outlook ............................................................... 4
Work in the Outlook user interface ................................. 5
  Sidebar: About Office ............................................... 6
  Identify app window elements .................................... 8
  Sidebar: Tell me what you want to do ......................... 15
  Work with the ribbon and status bar ......................... 15

Give us feedback
Tell us what you think of this book and help Microsoft
improve our products for you. Thank you!
http://aka.ms/tellpress
2 Explore Outlook modules ......................................................... 31

Work in the Outlook app window ............................................. 32
  Work with items ............................................................ 32
  Switch among modules ................................................. 34

Work in the Mail module ..................................................... 36
  Folder Pane content .................................................... 36
  Ribbon tabs ............................................................. 39
  Content area views ..................................................... 41
  Sidebar: Display conversations ...................................... 47
  Message windows ....................................................... 47

Sidebar: Draft responses in the Reading Pane ....................... 53

Sidebar: The Backstage view of a message ............................ 54

Work in the Calendar module ............................................... 55
  Ribbon tabs ............................................................. 56
  Calendar item windows ............................................... 57

Work in the People module ................................................ 59
  Ribbon tabs ............................................................. 60
  Contact record windows ............................................... 61

Work in the Tasks module ................................................ 63
  Ribbon tabs ............................................................. 64
  Task windows .......................................................... 64

Skills review ..................................................................... 65

Practice tasks .................................................................... 66
Part 2: Manage email messages

3 Send and receive email messages ................................................. 71
   Create and send messages .................................................... 72
      Create messages ........................................................... 73
      Troubleshoot message addressing ........................................ 78
      Save and send messages .................................................. 82
      Sidebar: Send from a specific account ................................... 84
   Attach files and Outlook items to messages .................................. 88
      Sidebar: New mail notifications ............................................ 95
   Display messages and message attachments .................................. 96
      Display message content .................................................. 96
      Display attachment content .............................................. 98
   Display message participant information .................................... 103
   Respond to messages ........................................................ 108
      Sidebar: Resending and recalling messages ............................. 112
   Skills review ................................................................. 115
   Practice tasks ............................................................... 116

4 Enhance message content ...................................................... 119
   Personalize default message formatting .................................... 120
   Apply thematic elements to individual messages ......................... 127
      Apply and change themes .................................................. 127
      Apply and change styles .................................................. 129
   Create and use automatic signatures ....................................... 131
   Incorporate images in messages ............................................ 137
   Change message settings and delivery options ............................ 139
   Skills review ................................................................. 147
   Practice tasks ............................................................... 148
5  Manage email security ......................................................... 153
   Block unwanted messages .................................................. 154
   Sidebar: Trace message origins ........................................... 156
   Manage messages in the Junk Email folder ............................ 158
   Configure junk email settings in your Inbox ........................ 164
   Configure junk email options ............................................. 165
   Increase email security ...................................................... 170
   Apply security measures to incoming messages .................... 170
   Apply security measures to outgoing messages ..................... 176
   Configure Outlook to use a digital ID ................................. 176
   Digitally sign or encrypt messages ...................................... 180
   Sidebar: Restrict access by using rights management .............. 184
   Skills review .................................................................. 184
   Practice tasks ............................................................... 185

6  Organize your Inbox ............................................................ 187
   Display and manage conversations ...................................... 188
   Arrange messages by specific attributes .............................. 194
   Categorize items ................................................................ 198
   Sidebar: Store information in Outlook notes ......................... 202
   Organize messages in folders ............................................. 206
   Sidebar: Print messages ..................................................... 210
   Skills review .................................................................. 211
   Practice tasks ............................................................... 212
Part 3: Manage contacts

7 Store and access contact information .................................................. 217
  Save and update contact information .................................................. 217
  Create and modify contact records .................................................. 218
  Sidebar: Contact record sources .................................................. 219
  Sidebar: Conform to name and address standards .......................... 220
  Communicate with contacts .......................................................... 231
    Sidebar: Create custom contact record fields .................................. 232
  Initiate actions from contact records ........................................... 233
  Select message recipients from address books .................................. 235
  Sidebar: Link contact records .................................................. 238
  Display different views of contact records ...................................... 238
    Sidebar: Modify the settings of any view ...................................... 243
  Print contact records .............................................................. 245
  Skills review .............................................................................. 251
  Practice tasks ............................................................................ 252

8 Manage contact records ................................................................. 255
  Create address books .................................................................. 256
  Import and export contact records ................................................. 260
  Create contact groups ................................................................. 268
  Quickly locate contact information ............................................... 275
  Personalize electronic business cards .......................................... 279
  Skills review .............................................................................. 285
  Practice tasks ............................................................................ 286
Part 4: Manage appointments and tasks

### Manage scheduling
- Schedule appointments and events ........................................... 291
  - Sidebar: Add holidays to your calendar ............................... 296
- Convert calendar items .................................................. 298
- Configure calendar item options ......................................... 300
- Schedule and change meetings .......................................... 306
- Respond to meeting requests ............................................ 314
- Display different views of a calendar ...................................... 316
  - Sidebar: Use the Date Navigator ...................................... 320
- Skills review ............................................................. 323
- Practice tasks ........................................................... 324

### Manage your calendar
- Define your available time ............................................... 330
- Configure time zones .................................................... 332
  - Sidebar: Specify appointment time zones ............................. 335
- Work with multiple calendars ............................................ 336
  - Connect to other calendars .......................................... 337
  - Manage the display of multiple calendars ........................... 342
- Share calendar information .............................................. 346
  - Share calendars with co-workers .................................... 347
  - Share calendar information outside of your organization .............. 356
- Print a calendar ......................................................... 359
- Skills review ............................................................. 364
- Practice tasks ........................................................... 365
Part 5: Maximize efficiency

Manage window elements ........................................... 407

Personalize the Outlook app window ............................... 408
  Configure the Folder Pane ........................................ 409
  Configure the Navigation Bar ..................................... 411
  Display module peeks .............................................. 412
  Configure the Reading Pane ..................................... 414
  Customize the Quick Access Toolbar ............................. 416
Customize the ribbon .................................................... 420
Customize user interface fonts  ........................................... 425
Skills review . .................................................................. 431
Practice tasks .................................................................. 432

**Customize Outlook options** ................................................ 437

Sidebar: About the Outlook Options dialog box ....................... 438
Configure general Office and Outlook options. ....................... 440
Configure message options .................................................. 443
  Compose messages ....................................................... 444
  Outlook panes ............................................................. 447
  Message arrival ........................................................... 448
  Conversation Clean Up ................................................ 449
  Replies and forwards ................................................... 449
  Save messages ............................................................ 451
  Send messages ............................................................ 453
  MailTips ................................................................. 454
  Tracking ................................................................. 455
  Message format .......................................................... 456
  Other ........................................................................ 456
Configure calendar options ..................................................... 457
Configure contact and task options. ....................................... 460
  Group options ............................................................ 461
  Contact options ........................................................ 461
  Task options ............................................................. 463
Configure search and language options .................................... 463
Configure advanced options .................................................. 467
Manage add-ins and security options. ....................................... 471
  Manage add-ins ........................................................ 471
Welcome! This *Step by Step* book has been designed so you can read it from the beginning to learn about Microsoft Outlook 2016 and then build your skills as you learn to perform increasingly specialized procedures. Or, if you prefer, you can jump in wherever you need ready guidance for performing tasks. The how-to steps are delivered crisply and concisely—just the facts. You'll also find informative, full-color graphics that support the instructional content.

Who this book is for

*Microsoft Outlook 2016 Step by Step* is designed for use as a learning and reference resource by home and business users of Microsoft Office programs who want to use Outlook to manage email messages, calendaring, contact records, and task lists. The content of the book is designed to be useful for people who have previously used earlier versions of Outlook, and for people who are discovering Outlook for the first time.

The *Step by Step* approach

The book's coverage is divided into parts representing general Outlook skill sets. Each part is divided into chapters representing skill set areas, and each chapter is divided into topics that group related skills. Each topic includes expository information followed by generic procedures. At the end of the chapter, you'll find a series of practice tasks you can complete on your own by using the skills taught in the chapter. You can use the practice files that are available from this book's website to work through the practice tasks, or you can use your own files and Outlook items.
Download the practice files

Although you can complete the practice tasks in this book by using your own Outlook items and files, for your convenience we have provided practice files for some of the tasks. You can download these practice files to your computer from http://aka.ms/outlook2016sbs/downloads. Follow the instructions on the webpage to install the files on your computer in the default practice file folder structure.

**IMPORTANT** Outlook 2016 is not available from the book’s website. You should install that app before working through the procedures and practice tasks in this book.

As you work through the practice tasks in this book, you will create Outlook items that you can use as practice files in later tasks.

The following table lists the practice files supplied for this book.

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Folder</th>
<th>File</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part 1: Get started with Outlook 2016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1: Outlook 2016 basics</td>
<td>Ch01</td>
<td>None</td>
</tr>
<tr>
<td>2: Explore Outlook modules</td>
<td>Ch02</td>
<td>None</td>
</tr>
<tr>
<td>Part 2: Manage email messages</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3: Send and receive email messages</td>
<td>Ch03</td>
<td>AttachFiles.docx</td>
</tr>
<tr>
<td>4: Enhance message content</td>
<td>Ch04</td>
<td>ApplyThemes.docx</td>
</tr>
<tr>
<td>5: Manage email security</td>
<td>Ch05</td>
<td>None</td>
</tr>
<tr>
<td>6: Organize your Inbox</td>
<td>Ch06</td>
<td>None</td>
</tr>
<tr>
<td>Part 3: Manage contacts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7: Store and access contact information</td>
<td>Ch07</td>
<td>None</td>
</tr>
</tbody>
</table>
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Stay in touch

Let’s keep the conversation going! We’re on Twitter at http://twitter.com/MicrosoftPress.
Enhance message content

Messages composed in and sent from Microsoft Outlook 2016 don’t have to consist only of plain text. They can contain diagrams and graphics, and can be visually enhanced by a judicious use of colors, fonts, and backgrounds. For more formal messages, you can attach a signature that includes your contact information, and perhaps a company logo.

You can add visual information to a message, contact record, or other Outlook item to bring it to your attention or to the attention of the recipient. For example, you can indicate that a message is of high importance or contains confidential information. You can also set options that notify you when a recipient reads a message or that prevent the recipient from forwarding or printing a message.

This chapter guides you through procedures related to personalizing default message formatting, applying thematic elements to individual messages, creating and using automatic signatures, incorporating imagery in messages, and changing message settings and delivery options.

In this chapter
- Personalize default message formatting
- Apply thematic elements to individual messages
- Create and use automatic signatures
- Incorporate images in messages
- Change message settings and delivery options

Practice files
For this chapter, use the practice file from the Outlook2016SBS\Ch04 folder. For practice file download instructions, see the introduction.
Personalize default message formatting

By default, the text content of an Outlook message is shown in black, 11-point Calibri (a font chosen for its readability), arranged in left-aligned paragraphs on a white background. You can change the appearance of the text in a message by applying either local formatting (character or paragraph attributes and styles that you apply directly to text) or global formatting (a theme or style set that you apply to the entire document) in the same way that you would when working in a Microsoft Word document or Microsoft PowerPoint presentation. However, if you prefer to use a specific font and color for all the messages you compose, you can save your preferences so that Outlook applies them to new messages and to message responses.

You set your default font and theme preferences from the Personal Stationery tab of the Signatures And Stationery dialog box. You specify font formatting for new messages and responses (replies and forwards) separately. (Even if you want to use the same font, you have to choose it twice.)

The default message fonts

The default settings use black Calibri for original messages and blue Calibri for responses. You can continue to use different colors to visually differentiate between original message content and your responses within a message trail. Or you might
prefer to always use the same font regardless of whether a message is new—this simpler approach can help recipients to recognize message content from you.

When setting default fonts, you have access to the full range of options in the Font dialog box.

You have access to the full range of font options for email messages

The font effect check boxes contain squares to indicate that the effects are neither on nor off (which is basically the equivalent of being off). You can leave these as-is or choose to specifically turn on an effect.

It’s best to choose a font face that is easy to read. Some aspects you might consider are:

- **Character width** Narrow fonts can be hard to read, and wide fonts can take up a lot of space.

- **Uppercase and lowercase letters** Some fonts display all letters uppercase.

- **Numbers that are easy to read** For example, some fonts display the number zero and the lowercase letter “o” almost identically. If you select one of these as your default font and then send someone a password that includes a zero, they might have difficulty reading it.
The Preview area of the Font dialog box displays the words *Sample Text* in the font that you select. That doesn’t cover all the bases, so you might want to try out a few fonts in an email message before you make a selection.

![List of fonts](image)

*Some fonts aren’t good choices for default message fonts*

When you set a default message font in the Font dialog box, it becomes the Body font. The Set As Default button doesn’t become active because, unlike when creating documents in Word or worksheets in Excel, there are no fonts to set other than the message font. You can’t change the font that Outlook uses in information fields such as those in message headers, contact records, and appointments.

![Tip](image)

Another font that you can set from this dialog box controls the way that plain-text messages you receive appear when you display them in Outlook. Many people send email messages from their smartphones, and they can configure messages to be sent as HTML or in plain text. (You can also choose one of these message types for messages that you subscribe to, such as package delivery notifications.) Plain text messages are simpler for software to render and to display consistently. If you don’t set a different default, plain text messages will appear in Calibri.
In addition to the message fonts, you can specify an email message theme (a pre-selected set of fonts, colors, and graphic elements) that Outlook will use when you create messages. Most themes include a colored or illustrated graphic background that you can include or exclude by selecting or clearing the Background Image check box.

Email message themes include fonts, colors, page backgrounds, and inline graphic elements

Instead of choosing a complete theme, you can choose stationery (think of this as choosing a patterned paper on which to write letters). Some stationery options have quite pronounced graphic images (dozens of teddy bears parading across the page), whereas others are more subtle (green bubbles on a green background). Some stationery options have graphics across the entire page, whereas others confine the graphics to the left edge of the email “page” and leave a clear space for text and other email content.
Stationery options range from subtle to busy

Your choice of stationery does not control your default message font; you must set that separately, as previously discussed in this topic. If you choose to use stationery (and I’d caution you to make this choice judiciously), take care to choose a font color that is visible against the stationery background and also visible to recipients who choose to block graphic elements of email messages. For example, it might be tempting to use clean white lettering against the brown background of the Jungle stationery, but for recipients who block graphics, the message will display white lettering on a white background—in other words, the message will appear to be blank unless they select the message content.

To open the Signatures And Stationery dialog box

1. Click the File tab to display the Backstage view. In the left pane, click Options to display the Outlook Options dialog box.

2. In the left pane of the Outlook Options dialog box, click the Mail tab.
3. On the Mail page, in the Compose messages section, do either of the following:
   ● To display the E-mail Signature tab, click the Signatures button.
   ● To display the Personal Stationery tab, click the Stationery and Fonts button.

To change the default font for outgoing messages

1. Display the Personal Stationery tab of the Signatures and Stationery dialog box.
2. Do either of the following to open the Font dialog box:
   ● To set the font for new messages, click the Font button in the New mail messages section.
   ● To set the font for message responses, click the Font button in the Replying or forwarding section.
3. In the Font dialog box, configure the font that you want Outlook to use for the selected message type. Then click OK.

To change the default font for the display of plain-text messages

1. Display the Personal Stationery tab of the Signatures and Stationery dialog box.
2. In the Composing and reading plain text messages section, click the Font button.
3. In the Font dialog box, configure the font that you want Outlook to use when displaying plain-text messages. Then click OK.

TIP The Composing And Reading Plain Text Messages setting is specific to your installation of Outlook and doesn't affect the way that plain-text messages are displayed to other people.

To open the Theme Or Stationery dialog box

1. On the Personal Stationery tab of the Signatures and Stationery dialog box, in the Theme or Stationery for new HTML e-mail message section, click the Theme button.

To specify a theme for outgoing messages

1. Open the Theme or Stationery dialog box.
2. In the Choose a Theme pane, click any entry that doesn’t end with (Stationery) to display a preview in the right pane.
3. To display modified theme options, select or clear any of the following check boxes:
   - Vivid Colors
   - Active Graphics
   - Background Image

4. After selecting and configuring the theme you want, click OK.

5. If you want to use a font other than the theme font, do the following:
   a. In the Theme or Stationery for new HTML e-mail message section of the Signatures and Stationery dialog box, click the Font list to display the options.

   ![Font options](image)

   You can override the theme font

   b. In the Font list, do either of the following:
      - To compose original messages with the theme font but use the font defined in the Replying Or Forwarding Messages section for responses, click Use my font when replying and forwarding messages.
      - To not use the theme font (but use the other theme elements), click Always use my fonts.

To specify a background stationery for outgoing messages

1. Open the Theme or Stationery dialog box.

2. In the Choose a Theme pane, click any entry that has (Stationery) appended to the name to display a preview in the right pane.

3. After selecting the background stationery you want, click OK.
Apply thematic elements to individual messages

If you prefer to apply thematic elements on an individual message basis, you can apply global formatting options—by using themes and style sets—with only a couple of clicks.

Apply and change themes

Nine of the standard Microsoft Office 2016 themes (which are not the same as the email message themes you can select in the Theme Or Stationery dialog box) are available from the Themes gallery on the Options tab in a message composition window. Each theme controls the colors, fonts, and graphic effects used in the message.

Office themes control fonts, colors, and graphic effects

The default theme for all email messages, Word documents, PowerPoint presentations, Microsoft Excel workbooks, and other Office 2016 documents is the Office theme. If you don’t apply another theme to your message, the colors, fonts, and effects in your message are controlled by the Office theme.
You can modify the formatting applied by the current theme by changing the color scheme, font set, or effect style.

**TIP** Office theme functionality is provided by Word 2016 and is available only when you have that app installed.

**To change the theme of a message**
1. On the **Options** tab of the message composition window, in the **Themes** group, click the **Themes** button, and then click the theme you want to apply.

**To change the color scheme used in a message**
1. Do either of the following:
   - On the **Options** tab of the message composition window, in the **Themes** group, click the **Colors** button (the ScreenTip says *Theme Colors*), and then click the color scheme you want to apply.
   - On the **Format Text** tab of the message composition window, in the **Styles** group, click the **Change Styles** button, click **Colors**, and then click the color scheme you want to apply.

**To change the font set used in a message**
1. Do either of the following:
   - On the **Options** tab of the message composition window, in the **Themes** group, click the **Fonts** button (the ScreenTip says *Theme Fonts*), and then click the font set you want to apply.
   - On the **Format Text** tab of the message composition window, in the **Styles** group, click the **Change Styles** button, click **Fonts**, and then click the font set you want to apply.

**To change the effect style used in a message**
1. On the **Options** tab of the message composition window, in the **Themes** group, click the **Effects** button (the ScreenTip says *Theme Effects*), and then click the effect you want to apply.
Apply and change styles

You can use *styles* to format text in email messages in the same way that you do in Word documents; however, most people won’t compose email messages of the length and outline detail that would require those, so we’ll discuss them only briefly in this book.

You can apply character and paragraph styles from the Styles gallery on the Format Text tab, or from the independent Styles pane. The benefit of the Styles pane is that it stays open and available while you work. You can dock the pane at the right side of the window or leave it floating anywhere on the screen.

**TIP** If you create different types of Office documents (such as Word documents, PowerPoint presentations, and corporate email messages) for your organization, you can ensure the uniform appearance of all the documents by applying the same Office theme and style set to all the documents. For example, you might create a theme that incorporates your company’s corporate fonts and logo colors.

You can specify the styles that you want to appear in the Styles gallery and in the Styles pane.
TIP  You can preview the effect of a style on the currently selected text by pointing to the style in the Styles gallery, but not in the Styles pane.

A style set changes the colors, fonts, and paragraph formatting of individual styles. You can change the appearance of all the styles in a message by selecting any of the 17 available style sets (or by creating your own). Selecting a style set changes the appearance of all the text in the current message, and of the icons in the Styles gallery.

Effects of changing the style set

SEE ALSO  For more information about using themes, styles, and style sets to format content, refer to Microsoft Word 2016 Step by Step by Joan Lambert (Microsoft Press, 2015).

To display the full Styles gallery

1. On the Format Text tab, in the Styles group, click the More button to expand the Styles gallery.

To open the Styles pane

1. On the Format Text tab, click the Styles dialog box launcher.
To move the Styles pane

1. Point to the Styles pane header. When the pointer changes to a four-headed arrow, drag the pane.

2. Do any of the following:
   - Drag the pane to any location on the screen.
   - Drag the pane to the inside edge of the message composition window to dock it to the window.
   - Drag the pane away from the docking location to undock it.

To apply a style

1. Click anywhere in the word or paragraph you want to format, or select the specific text you want to format.

2. In the Styles gallery or Styles pane, click the style you want to apply.

To change the style set of a message

1. On the Format Text tab, in the Styles group, click the Change Styles button.

2. On the Change Styles menu, click Style Set, and then click the style set you want.

   **TIP** You can display the name of a style set and preview the effect of selecting it by pointing at its thumbnail in the Style Set gallery.

Create and use automatic signatures

When you send an email message to someone, you will most likely “sign” the message by entering your name at the end of the message text. You can have Outlook insert your signature text in outgoing messages by creating an email signature and assigning it to your email account. Your email signature can include additional information that you want to consistently provide to message recipients.
An email signature can include formatted text and graphics

A typical email signature would commonly include your name and contact information, but depending on your situation, you might also include information such as your company name, job title, a legal disclaimer, a corporate or personal slogan, a photo, and so on. You can even include your electronic business card as part or all of your email signature.

SEE ALSO For more information about electronic business cards, see “Personalize electronic business cards” in Chapter 8, “Manage contact records.”

You can create different signatures for use in different types of messages or for use when you're sending messages from different email accounts. For example, you might create a formal business signature for client correspondence, a casual business signature for interoffice correspondence, and a personal signature for messages sent from another account. Or you might create a signature that contains more information to send with original email messages, and a signature that contains less information to send with message replies.

You can format the text of your email signature in the same ways that you can format message text. If you want to apply formatting that's not available from the selection of buttons across the top of the signature content pane, you can create and format
Create and use automatic signatures

To display the E-mail Signature tab of the Signatures And Stationery dialog box

1. From any module, open the Outlook Options dialog box and display the Mail page.
2. In the Compose messages section, click the Signatures button.

Or

1. In a message composition window, display the Message tab or Insert tab.
2. In the Include group, click the Signature button and then click Signatures.

To create a simple signature

1. Display the E-mail Signature tab of the Signatures and Stationery dialog box. Any existing signatures are listed in the Select Signature To Edit box.
2. Below the Select signature to edit box, click the New button. Outlook prompts you to supply a name for the new signature before you can work with the signature content.
Assign a name that will make it easy for you to differentiate signatures when inserting them

3. In the **Type a name for this signature** box, enter a name that will help you differentiate the signature from others you create, such as *Work* or *Disclaimer*. Then click **OK** to create the signature and activate it for editing.

4. In the **Edit signature** box, enter the text that you want to include, and format the font if you want to.

```
Thank you
Samantha Smith
Special Projects - Manager
```

*Formatted elements of your signature will appear in email messages exactly as they do here*

5. When you’re done with the simple signature, click **Save**.
To edit an existing email signature

1. Display the **E-mail Signature** tab of the **Signatures and Stationery** dialog box.
2. In the **Select signature to edit** box, click the signature you want to edit, to display it in the Edit Signature pane.
3. Make any changes you want, and then click the **Save** button.

To add an inline image to an email signature

1. Display the **E-mail Signature** tab of the **Signatures and Stationery** dialog box.
2. Create a new signature or choose a signature to edit.
3. In the **Edit signature pane**, click to position the cursor where you want to insert the picture.
4. On the toolbar above the pane, click the **Insert Picture** button (the second button from the right).
5. In the **Insert Picture** dialog box, browse to and select the image you want to insert, and then click **Insert**.
6. Make any other changes you want, and then click the **Save** button.

To add fancy images to an email signature

1. In an email composition window, Word document, PowerPoint slide, or image editing app, create the signature you want and save it as an image file. Trim all empty space from the edges of the image.
2. Display the **E-mail Signature** tab of the **Signatures and Stationery** dialog box.
3. Create a new signature or choose a signature to edit.
4. In the Edit signature pane, select and delete any existing content that you don’t want to include with the image.
5. Click to position the cursor where you want to insert the image.
6. On the toolbar above the pane, click the Insert Picture button (the second button from the right).
7. In the Insert Picture dialog box, browse to and select the image you want to insert, and then click Insert.

You can include text in addition to the graphic if you want

8. Make any other changes you want, and then click the Save button.

TIP Not all email message apps automatically display embedded images. If your email message signature contains an image, some message recipients will get it as an attachment.

To automatically add an email signature to outgoing messages

1. Display the E-mail Signature tab of the Signatures and Stationery dialog box.
2. In the Choose default signature section, do the following:
   - In the E-mail account list, click the account you want to assign the signature to.
   - In the New messages list, click the signature that you want Outlook to insert into all new email messages you send from the selected account.
   - In the Replies/forwards list, click the signature that you want Outlook to insert into all response message you send from the selected account.
3. In the **Signatures and Stationery** dialog box, click **OK**.

4. Create a new email message to verify that the signature appears.

**TIP** If you have more than one email account set up in Outlook, you can configure different signatures for each account.

**To manually insert an existing email signature in a message**

1. In a message composition window, display the **Message** tab or the **Insert** tab.
2. In the **Include** group, click the **Signature** button.
3. In the **Signature** list, click the name of the email signature you want to insert.

**TIP** If you have not previously set up a signature, clicking the Signature button displays a short list that includes a Signatures option; clicking this option opens the Signatures And Stationery dialog box in which you can create a signature.

**To remove an email signature from a message**

1. Select and delete the signature content as you would any other message content.

**Incorporate images in messages**

Email is a means of communicating information to other people, and, as the old saying goes, a picture is worth a thousand words. Using Outlook 2016, you can communicate visual information in the following ways:

- Share photographs with other people by attaching the photos to messages or embedding them in messages.

**SEE ALSO** For information about attaching pictures to messages, see “Attach files and Outlook items to messages” in Chapter 3, “Send and receive email messages.”

- Share information from websites, documents, and other visual presentations by capturing images of your screen directly from Outlook and then inserting those images in your message.
- Explain complicated processes and other business information by creating SmartArt graphics within messages or by embedding SmartArt graphics that you create in other Office 2016 apps.

- Communicate statistical information by creating a chart within a message.

You can insert all these types of images from the Illustrations group on the Insert tab into the content pane of an email message, calendar item, or task, or into the notes pane of a contact record. (One exception: you can’t insert an image into a note.)

Two uses of images in an email message

Images can be especially valuable in business communications, when you need to clearly explain facts or concepts, particularly to a global audience. In Outlook 2016 (and other Office 2016 apps), you can depict processes, cycles, hierarchies, and other relationships by using SmartArt graphics, and you can depict graphical representations of numeric data by using charts.
SmartArt graphics are graphical representations of lists of information. You can create a SmartArt graphic directly in an email message by selecting the type of graphic you want to create and then entering the information to populate it. You can modify the SmartArt graphic to fit the information you want to present, change the graphic type if your original selection doesn’t best represent the final information, and format the graphic with professionally themed color combinations and effects. When you send the message, Outlook converts the SmartArt graphic to a static graphic.

Charts are graphical representations of tables of data. Tables and charts are frequently created by using Excel. You can also create a chart directly in an Outlook email message. Charts you create in an email message look exactly like those you would create in an Excel workbook—because they are based on an Excel data source that is created from within Outlook.

When you send or receive a message that contains a chart or SmartArt graphic, the chart or graphic is converted to a static image (a picture) and resized to fit the message window. If you open the message from your Sent Items folder, you’ll find that the same is true of the graphic in the sent message. You can copy and reuse the picture in other files, such as messages, documents, and presentations, but you can no longer edit it.

You work with all these types of images in an Outlook message just as you would in a Word document or on a PowerPoint slide. Because Outlook is about email, contact management, and calendaring, we’re not going to get into a deep discussion of images and graphics in this book. If you would like more information you can find it in the Microsoft Word 2016 Step by Step or Microsoft PowerPoint 2016 Step by Step books (Microsoft Press, 2015).

Change message settings and delivery options

When you send a message, you can include visual indicators of the importance, sensitivity, or subject category of a message or other Outlook item, flag a message for follow-up, restrict other people from changing or forwarding message content, provide a simple feedback mechanism in the form of voting buttons, and specify
message delivery options to fit your needs. Some of these options display icons in the message header that are visible to recipients directly in the Outlook message list.

This message has a reminder, a status, and a follow-up flag. Voting buttons and Sensitivity don’t display message header icons.

In the message reading window, many of the options are represented by text rather than icons.

The Action Items add-in can alert recipients to requests within the message text.
Common message settings and delivery options include the following:

- **Flags and reminders** You can place an outgoing message on your task list, add an informational reminder to it, or set a reminder to appear at a certain time and date, for yourself and for message recipients. The flag options are Call, Do not Forward, Follow up, For Your Information, Forward, No Response Necessary, Read, Reply, Reply to All, and Review.

- **Importance** You can indicate the urgency of a message by setting its importance to High or Low (the default importance is Normal). A corresponding banner appears in the message header and, if the Importance field is included in the view, an importance icon appears in the Inbox or other message folder.

- **Sensitivity** You can indicate that a message should be kept private by setting its sensitivity to Confidential, Personal, or Private. No indicator appears in the message folder, but a banner appears in the message header to indicate a sensitivity level other than Normal.

- **Security** If you have a digital ID, you can digitally sign the message; or you can encrypt the contents of the message.

- **Voting options** If you and your message recipients have Microsoft Exchange Server accounts, you can add voting buttons to your messages so that recipients can quickly select from multiple-choice response options.

- **Tracking options** You can track messages by requesting delivery receipts and read receipts. These receipts are messages automatically generated by the recipient's email server when it delivers the message to the recipient and when the recipient opens the message. Recipients might be prompted to approve the delivery of the receipts, so requesting them is no guarantee of receiving them.

- **Delivery options** You can have reply messages delivered to an email address other than yours, specify a date and time for the message to be delivered and to expire, and set advanced attachment format and encoding options.

**TIP** You can assign a category to an outgoing message but it will not be visible to the recipient, only to the sender.

The most commonly used options are available directly in the message composition window, in the Tags group on the Message tab, and in the Tracking and More Options groups on the Options tab.
Some message options are available from the ribbon

Clicking the dialog box launcher in the lower-right corner of any of these groups opens the Properties dialog box, in which you can set all the options other than follow-up flags.

From the Properties dialog box, you can control message settings, security settings, and voting, tracking, and delivery options.

You can limit the actions other people can take with messages they receive from you by restricting the message permissions. For example, you can prevent recipients from forwarding or printing the message, copying the message content, or changing the content when they forward or reply to the message. (Restrictions apply also to message attachments.) Within a message window, permission options are available both on the Info page of the Backstage view and in the Permission group on the Options tab.

SEE ALSO For information about digital signatures and for more information about restricting recipients from forwarding, copying, or printing messages you send, see “Increase email security” in Chapter 5, “Manage email security.”
To open the Properties dialog box

1. On the message composition window ribbon, click the dialog box launcher in any of the following groups:
   - The Tags group on the Message tab
   - The Tracking group on the Options tab
   - The More Options group on the Options tab

To indicate the importance of a message

1. Do either of the following:
   - On the Message tab, in the Tags group, click High Importance or Low Importance.
   - Open the Properties dialog box. In the Settings section, in the Importance list, click Low, Normal, or High.

To indicate the sensitivity of a message

1. Open the Properties dialog box.
2. In the Settings section, in the Sensitivity list, click Normal, Personal, Private, or Confidential.

To add standard voting buttons to a message

1. Do either of the following:
   - On the Options tab, in the Tracking group, click Use Voting Buttons to display the Use Voting Buttons list.
   - Open the Properties dialog box. In the Voting and Tracking options section, select the Use voting buttons check box. Then expand the adjacent list.
2. In the list, click one of the following:
   - Approve;Reject
   - Yes;No
   - Yes;No;Maybe
3. Close the Properties dialog box if you opened it in step 1.
   An information bar at the top of the message confirms that you’ve added voting buttons to the outgoing message.
To add custom voting buttons to a message

1. Do either of the following:
   - On the **Options** tab, in the **Tracking** group, click **Use Voting Buttons** and then click **Custom**.
   - Open the **Properties** dialog box. In the **Voting and Tracking options** section, select the **Use voting buttons** check box.

2. In the **Use voting buttons** box, select and delete any current button labels. Then enter the custom button labels you want, separated by semicolons.

3. Close the **Properties** dialog box.

**To request message receipts**

1. In the **Tracking** group on the **Options** tab, or in the **Voting and Tracking options** section of the **Properties** dialog box, select one or both of the following check boxes:
   - Request a delivery receipt for this message
   - Request a read receipt for this message

2. Close the **Properties** dialog box if you opened it in step 1.
To direct message replies to a different email address

1. Do either of the following:
   - On the Options tab, in the More Options group, click Direct Replies To.
   - Open the Properties dialog box. In the Delivery options section, select the Have replies sent to check box.

2. In the Have replies sent to box, select and delete the current recipient. Then enter the email address or addresses (separated by semicolons) that you want replies to go to.

3. Close the Properties dialog box.

To delay the delivery of a message

1. Do either of the following:
   - On the Options tab, in the More Options group, click Delay Delivery.
   - Open the Properties dialog box. In the Delivery options section, select the Do not deliver before check box.

2. To the right of Do not deliver before, select or enter the date and time that you want to delay delivery until.

3. Close the Properties dialog box.

To set an expiration date for a message

1. Open the Properties dialog box.

2. In the Delivery options section, select the Expires after check box.

3. To the right of Expires after box, select or enter the date and time that you want the message to expire.

4. Close the Properties dialog box.

   The expiration of a message is indicated to the recipient in the message list and in the message header.
Expired messages are marked for both the recipient and the sender

To flag a message for follow-up by the recipient

1. On the Message tab, in the Tags group, click Follow Up, and then click Add Reminder. The Custom dialog box opens.

By default, the Custom dialog box is configured to set a reminder for the message sender and not the recipient

2. In the Custom dialog box, clear the Flag for Me check box and select the Flag for Recipients check box.
3. In the **Flag for Recipients** section, do the following:
   - In the **Flag to** list, click **Follow up** (or one of the other available flags).
   - If you want a reminder to appear to the recipient, select the **Reminder** check box and then specify a date and time for the reminder.

4. In the **Custom** dialog box, click **OK**.

**Skills review**

In this chapter, you learned how to:

- Personalize default message formatting
- Apply thematic elements to individual messages
- Create and use automatic signatures
- Incorporate images in messages
- Change message settings and delivery options
Practice tasks

The practice file for these tasks is located in the Outlook2016SBS\Ch04 folder.

**IMPORTANT** As you work through the practice tasks in this book, you will create Outlook items that might be used as practice files for tasks in later chapters. If you haven’t created specific items that are referenced in later chapters, you can substitute items of your own.

Personalize default message formatting

Start Outlook, and then complete the following tasks:

1. Display the **Personal Stationery** tab of the **Signatures and Stationery** dialog box.

2. Set the default fonts for new messages and responses to the font, font size, and font color that you want to use.

3. Open the **Theme or Stationery** dialog box. Look through the available themes and stationery pages. Consider the effects of using one of these in your daily correspondence. If you identify a theme or stationery background that you feel would enhance your messages, select it and click **OK** to apply the setting. Otherwise, click **Cancel**.

4. If you chose a theme in step 3, review the **Font** options and select the font option you want to use. Then close the dialog box.

5. Display your **Inbox**, and do the following to test your settings:
   - Create a new email message and enter some text.
   - Respond to a received email message and enter some text.
   - If you don’t like the results of your selections, close the unsent messages, repeat this set of tasks, and modify the settings.

6. When you’re happy with the results, close the unsent messages and delete the message drafts, if prompted to do so.
Apply thematic elements to individual messages

Display your Inbox, and then complete the following tasks:

1. Create a new email message.

2. From the practice file folder, open the **ApplyThemes** document in Word and display it in Print Layout view.

3. In the **ApplyThemes** document, select the text starting with *Office Procedures* and continuing through the website URL. Then copy the text to the Clipboard.

4. Return to the message composition window that you opened in step 1, and paste the copied content into the message content pane. Notice that the text formatting changes immediately.

5. Adjust the size of the message composition window so you can see all the content. Then display the **Options** tab of the window.

6. In the **Themes** group, display the **Colors** menu. (Ensure that you can still see the headings of the message with the menu open.) Point to different color schemes to display a live preview of their effects on the message content. Then click a color scheme you like. In the message, notice the formatting that has changed.

7. In the **Themes** group, display the **Fonts** menu. Point to different font sets to preview them in the message, and then click a font set that you like. Notice the changes in the message content.

8. Display the **Format Text** tab of the message composition window.

9. From the **Styles** group, display the **Style Set** gallery. Point to different style sets to preview their effects on the message, and then click a style set you like. Notice the changes in the message content.

10. If you want to, enter **SBS style test** in the **Subject** box, and then send the message to yourself. Otherwise, close the message composition window without saving or sending the message.
Create and use automatic signatures

Display your Inbox, and then complete the following tasks:

1. Display the E-mail Signature tab of the Signatures and Stationery dialog box.

2. Create an email signature that is appropriate to your primary email account. It could be as simple as your name, or could also include contact information, a company slogan, a favorite saying, or other text. Assign an appropriate name to the email signature.

3. If Outlook doesn’t automatically do so, assign the signature to new messages from the email account you created it for.

4. Close the dialog box, and display your Inbox.

5. Create a new email message from your primary account, and verify that the signature appears in the message.

6. From the message composition window, redisplay the E-mail Signature tab of the Signatures and Stationery dialog box.

7. Select the signature that you created in step 2, and make any changes that you want. For example, you might want to add information, apply formatting, insert fancy text from a Word document, or insert an image.

8. Close the dialog box and return to the message composition window you opened in step 5.

9. Delete the original email signature from the message, and then manually insert the updated signature.

10. Close the message window without sending or saving the message.

11. If you want to create other signatures or assign the signature you created in step 2 to responses or to other accounts, do so at this time.

Incorporate images in messages

There are no practice tasks for this topic.
Change message settings and delivery options

Display your Inbox, and then complete the following tasks:

1. Create a new email message, and do the following:
   - In the **To** box, enter your own email address.
   - In the **Subject** box, enter *Lunch preference*.
   - In the message content pane, enter *What do you want to eat for lunch?*

2. Using any of the procedures described in this chapter, do the following:
   - Set the message importance to *Low*.
   - Set the sensitivity to *Confidential*.
   - Add custom voting buttons to the message that allow you to vote for *Pizza*, *Salad*, or *Sandwiches*.
   - Request a delivery receipt and a read receipt.
   - Set the message to expire in about an hour.
   - Flag the message for follow-up by the recipient, and set a reminder for a time about a half hour away.

3. Send the message, and then do the following:
   - Watch for the message receipts.
   - When the message arrives, vote for your lunch preference.
   - When the reminder appears, dismiss it.
   - After the message expires, notice the changes in the message list and in the message window.
You can use the Outlook 2016 calendar to organize your daily activities and to remind you of important tasks and events. If you’re a busy person and use the Outlook calendar to its fullest potential, it might at times seem as though the calendar runs your life—but that isn’t necessarily a bad thing! Using the calendar effectively can help you stay organized, on time, and on task. You can schedule and track appointments, meetings, and events, and block time as a reminder to yourself to take care of tasks. And because you can also set up Outlook on your mobile device, you can be assured of having up-to-date schedule information available wherever and whenever you need it.

If you have a Microsoft Exchange Server account, a calendar is part of that account. Some Internet email accounts also have associated calendars. When you configure Outlook to connect to a different type of account, Outlook also connects to the associated calendar. If you don’t have a calendar as part of your account, Outlook creates a blank calendar for you. You can easily schedule appointments, events, and meetings on any Outlook calendar.

This chapter guides you through procedures related to scheduling and changing appointments, events, and meetings; responding to meeting requests; and displaying different views of a calendar.

**In this chapter**
- Schedule appointments and events
- Convert calendar items
- Configure calendar item options
- Schedule and change meetings
- Respond to meeting requests
- Display different views of a calendar

**Practice files**
No practice files are necessary to complete the practice tasks in this chapter.
Schedule appointments and events

Appointments are blocks of time you schedule for only yourself (as opposed to meetings, to which you invite other Outlook users). An appointment has a specific start time and end time (as opposed to an event, which occurs for one or more full 24-hour periods).

Events are day-long blocks of time that you schedule on your Outlook calendar, such as birthdays, payroll days, or anything else occurring on a specific day but not at a specific time. In all other respects, creating an event is identical to creating an appointment, in that you can specify a location, indicate recurrence, indicate your availability, and attach additional information to the event item.

You can schedule an appointment by entering, at minimum, a subject and time in an appointment window or directly on the calendar. The basic appointment window also includes a field for the appointment location and a notes area in which you can store general information, including formatted text, website links, and even file attachments so that they are readily available to you at the time of the appointment.

If your organization has Skype For Business, Skype meeting options appear on the Appointment tab.

If you create an appointment that immediately follows or precedes another, the Information Bar at the top of the window indicates that the appointment is adjacent to another on
your calendar. If you create an appointment that has a time overlap with an existing appointment, the InfoBar indicates that the appointment conflicts with another.

To schedule an event, you need to provide only the date. You can schedule an event in an appointment window, or directly on the calendar.

**TIP** You don’t have to create appointments and events from scratch; you can also create them from email messages. For information, see “Convert calendar items” later in this chapter.

When the Calendar view is displayed, events are shown on the calendar in the date area; appointments are displayed in the time slots.

You can display basic details in a ScreenTip by pointing to the appointment or event.

**SEE ALSO** For information about setting availability, see “Configure calendar item options” later in this chapter.

**IMPORTANT** The procedures in this chapter assume that you’re working with an Exchange account. Some functionality might be unavailable if you’re working with a calendar that’s part of another type of account.
To open a new appointment window

1. In the Calendar module, do either of the following:
   - Press Ctrl+N.

Or

1. In any module, do either of the following:
   - On the Home tab, in the New group, click New Items, and then click Appointment.
   - Press Ctrl+Shift+A.

To schedule an appointment

1. Open a new appointment window.
2. In the Subject box, enter an identifying name for the appointment.
3. In the Location box, enter the appointment location, if it’s pertinent, or any other information that you want to have available in the appointment header.
4. In the Start time row, enter or select a date and time. Outlook automatically sets the End Time to a half hour after the start time.
5. In the End time row, enter or select a date and time. An appointment can span overnight or across multiple days.
6. On the Appointment tab, in the Actions group, click the Save & Close button.

Or

1. Display the calendar in the Day, Work Week, or Week arrangement of the Calendar view.
2. Do either of the following in the calendar pane:
   - In the calendar, click the time slot at the appointment start time on the day of the appointment.
   - Drag from the appointment start time through to the appointment end time.
Schedule appointments and events

When you release the mouse button, Outlook displays an editable bar that spans the selected time (or one time slot, as specified by the time scale of the calendar).

3. In the editable bar, enter an identifying name for the appointment. When you begin typing, Outlook creates an appointment with the default availability and reminder time.

When an appointment is being edited on the calendar, it has sizing handles on the top and bottom

4. If you want to change the appointment time span, drag the top or bottom sizing handle.

5. Press Enter or click away from the bar to create the appointment.
Add holidays to your calendar

Holidays are a type of event, and it can be useful to have them on your calendar so you can plan around days that you might not be working or that businesses might be closed. Instead of creating events on your calendar for individual holidays, you can have Outlook add them for you.

When adding holidays to the calendar, you can choose from 111 countries or regions, and four religions. You can add multiple sets of holidays to your calendar, so if you work with clients or colleagues in another location, you can add those holidays to your calendar so you can anticipate scheduling issues.

To add holidays to your Outlook calendar, follow these steps:

1. Open the Outlook Options dialog box and display the Calendar page.
2. In the Calendar options section, click the Add Holidays button to open the Add Holidays to Calendar dialog box.
3. Select the check boxes of the locations or religions whose holidays you want to add to your calendar, and then click OK.
4. After Outlook adds the selected holidays to your calendar, click OK to close the Outlook Options dialog box.
**TIP** If you try to install the holidays of the same location or religion twice, Outlook notifies you of this and asks whether you want to import them again. If you inadvertently add the same set of holidays to the calendar twice, the easiest way to rectify the situation is to remove all occurrences of that location’s holidays and then add them again.

Outlook adds the holiday occurrences from 2012 through 2022 to your calendar, and assigns a color category named *Holiday* to them.

**SEE ALSO** For information about categories, see “Categorize items” in Chapter 6, “Organize your Inbox.”

To remove a set of holidays from your calendar, follow these steps:

1. Search the calendar for `category:holiday`. Narrow the search to a specific location or holiday by adding search criteria if necessary, to locate the holidays you want to remove.

   ![Outlook highlights the search terms in the results](image)

2. Select individual holidays you want to remove; or click any holiday in the list to activate the list, and then press Ctrl+A to select all the holidays in the search results. Then press the **Delete** key.
To schedule an event

1. Open a new appointment window.
2. In the Subject box, enter an identifying name for the event.
3. In the Location box, enter the event location, if it’s pertinent, or any other information that you want to have available in the event header.
4. In the Start time row, enter or select the event date. Then at the right end of the row, select the All day event check box.
5. Enter any additional information as you would for an appointment. Then save and close the event.

Or

1. Display the Calendar view of the calendar.
2. Do either of the following:
   - In the Day, Work Week, or Week arrangement of the calendar, on the day that you want to create the event, click the space below the day and date, and above the time slots. This is the event slot.
   - In the Month arrangement of the calendar, click the day that you want to create the event.
3. Enter a title for the event, and then press Enter.

Convert calendar items

All Outlook calendar items are built from the same basic template. These two factors define a calendar item as an appointment, event, or meeting:

- Whether the item has specific start and end times or is all day
- Whether you invite other people through Outlook

You can easily convert an appointment into an event or meeting, or convert an event into an appointment or an invited event.

If you want to schedule an appointment, event, or meeting based on the information in an email message that you receive, you can easily do so by dragging the message to the calendar. For example, if a friend or co-worker sends you a message that contains the
details of the grand opening for a local art gallery, you can add that information to your calendar. You can retain any or all of the message information as part of the calendar item so that you (or other meeting participants) have the information on hand when you need it. After creating the calendar item, you can delete the actual message from your Inbox.

**To create an appointment from an email message**

1. Display your Inbox.
2. Drag the message from the message list to the Calendar link or button on the Navigation Bar.
3. After the cursor changes to a plus sign, release the mouse button to create an appointment based on the message and open the appointment window for editing. The appointment has the subject and content of the original message. The start and end times are set to the next half-hour increment following the current time.
4. Set the date and times for the appointment, and do any of the following:
   - In the Options group, change the availability, reminder time, or recurrence.
   - In the Tags group, assign a category to the appointment, mark it as private, or change the priority.
   - In the content pane, edit the original message content to suit the requirements of the appointment.
5. In the appointment window, click the Save & Close button to save the appointment to your calendar.

**SEE ALSO** For information about adding message content to your To-Do List, see “Create tasks” in Chapter 11, “Track tasks.”

**To convert an appointment to an event**

1. Open the appointment window.
2. At the right end of the Start time row, select the All day event check box.
3. Change the event date, options, or tags, and then save and close the event window.
To convert an appointment to a meeting

1. Open the appointment window.
2. On the Appointment tab in the Attendees group, click the Invite Attendees button to add a To box to the header and display the meeting window features.
3. Enter contact information for the people you want to invite to the meeting.
4. Add a location if necessary, and then click the Send Invitation button.

To convert an event to an invited event

1. Open the event window.
2. On the Event tab, in the Attendees group, click the Invite Attendees button to add a To box to the header and display the meeting window features.
3. Enter contact information for the people you want to invite to the event.
4. Add a location if necessary, and then click the Send Invitation button.

To convert an event to an appointment

1. Open the event window.
2. At the right end of the Start time row, clear the All day event check box.
3. Set the appointment start and end times, and change the options as necessary. Then save and close the appointment window.

Configure calendar item options

Appointments, events, and meetings share many common elements, and you use the same techniques to work with those options in all types of calendar items. The five options that you can configure for all items are:

- **Time zones** You can specify the time zone in which an appointment, event, or meeting occurs. This helps to ensure that the start and end times are clearly defined when you’re traveling or inviting people in multiple time zones to an online meeting. You have the option of specifying different time zones for the start time and the finish time. This is useful when your “appointment” is an
airplane flight with departure and arrival cities located in different time zones, and you want the flight to show up correctly wherever you’re currently located.

- **Availability** When creating an appointment or event, you indicate your availability (referred to as *Free/Busy time*) by marking it as Free, Working Elsewhere, Tentative, Busy, or Out Of Office. The appointment or event is color-coded on your calendar to match the availability you indicate. Your availability is visible to other Outlook users on your network and is also displayed when you share your calendar or send calendar information to other people.

The default availability for new appointments and meetings is Busy, and for events is Free.

**SEE ALSO** For information about sharing your calendar with other Outlook users on your network and about sending your schedule information in an email message, see “Share calendar information” in Chapter 10, “Manage your calendar.”

- **Reminder** By default, Outlook displays a reminder message 15 minutes before the start time of an appointment or meeting, or 12 hours before an event (at noon the preceding day). You can change the reminder to occur as far as two weeks in advance, or you can turn it off completely if you want to. If you synchronize your Outlook installation with a mobile device, reminders also appear on your mobile device. This is very convenient when you are away from your computer.

  **TIP** Reminders can be indicated on the calendar by a bell icon. This option is turned off by default in Outlook 2016. You can turn it on in the Calendar Options section of the Calendar page of the Outlook Options dialog box.

- **Recurrence** If you have the same appointment, event, or meeting on a regular basis—for example, a weekly exercise class, a monthly team meeting, or an anniversary—you can set it up in your Outlook calendar as a recurring item. A recurring calendar item can happen at almost any regular interval, such as every Tuesday and Thursday, every other week, or the last weekday of every month.

  Configuring a recurrence creates multiple instances of the item on your calendar at the time interval you specify. You can set the item to recur until further notice, to end after a certain number of occurrences, or to end by a certain date. The individual occurrences of the recurring item are linked. When making
changes to a recurring item, you can choose to update all occurrences or only an individual occurrence of the appointment.

Recurring items are indicated on the calendar by circling arrows.

- **Privacy** You can tag a calendar item as Private if you want to ensure that the details aren’t displayed when you share your calendar or send calendar information to other people.

Private items are indicated on the calendar by a lock, and identified to other people as Private Appointment rather than by the subject.

You can specify time zones, your availability, the reminder time, and the recurrence, and mark an item as private, when you create the item. Alternatively, you can edit the item later and configure any of these options. The time zone can be specified only in the item window; the other options can be set on the item type–specific tab in the item window or the item type–specific tool tab that appears on the Outlook ribbon when you select an item on the calendar. In single-occurrence items, these tabs are labeled Appointment, Event, Meeting, or Invited Event. In recurring items, the tab names include Occurrence or Series to indicate whether you’re editing one or all occurrences of the item.

*Outlook evaluates recurring items and provides information*
You can assign categories and importance to appointments, events, and meetings in the same way that you do to messages and other Outlook items. In some ways, categories are more useful in the Calendar than in other modules.

![Calendar screenshot]

Color categories provide information at a glance about your schedule.

To specify the time zone of an appointment or meeting

1. Open the item window.
2. On the Appointment or Meeting tab, in the Options group, click the Time Zones button to display the time zone controls in the Start Time and End Time rows. The time zone controls display the time zone your computer is currently set to.
3. Click the time zone control that you want to change, and then click the time zone.

![Time zone controls screenshot]

Set the time zones to ensure that the time is accurate from any location.

To hide the time zone controls

1. Select identical entries in the Start time and End time time zone controls.
2. On the Appointment or Meeting tab, in the Options group, click the Time Zones button to remove the controls.
To modify an appointment, event, or meeting

1. Display the calendar in the Day, Work Week, or Week arrangement of the Calendar view, with the appointment visible.

2. In the calendar pane, click the item once to select it. Then do any of the following:
   - On the item type–specific tool tab, make any changes to the options or tags.
   - Drag the item from the current time slot to a new time slot.
   - Drag the top sizing handle to change an appointment start time.
   - Drag the bottom sizing handle to change an appointment end time.

3. To open the item window, in which you can make other changes, do either of the following:
   - Press Enter.
   - On the item type–specific tool tab, in the Actions group, click Open.

To indicate your availability during an appointment, event, or meeting

1. Open the item window, or select the item on the calendar.

2. On the item-specific tab or tool tab, in the Options group, click the Show As list, and then click the availability.

To change the default reminder for an appointment, event, or meeting

1. Open the item window, or select the item on the calendar.

2. On the item-specific tab or tool tab, in the Options group, click the Reminder list, and then click the time (or click None to have no reminder).
To create recurrences of an appointment, event, or meeting

1. Open the item window, or select the item on the calendar.

2. On the item-specific tab or tool tab, in the Options group, click the Recurrence button to open the Recurrence dialog box. The default recurrence is weekly on the currently selected day of the week.

3. In the Recurrence dialog box, do any of the following:
   - In the End list, click the arrow and select an end time for the recurring meeting.
   - In the Recurrence pattern section, select how often you want the meeting to recur.
   - In the Range of recurrence section, select how many times you want the meeting to occur, or select the last date you want the meeting to recur.

4. Click OK in the Recurrence dialog box to replace the Start Time and End Time fields in the appointment window with the recurrence details.
Schedule and change meetings

A primary difficulty when scheduling a meeting is finding a time that works for all the people who need to attend it. Scheduling meetings through Outlook is significantly simpler than other methods of scheduling meetings, particularly when you need to accommodate the schedules of several people. Outlook displays the individual and collective schedules of people within your own organization, and of people outside of your organization who have published their calendars to the Internet. You can review attendees’ schedules to locate a time when everyone is available, or have Outlook find a convenient time for you.

You can send an Outlook meeting invitation (referred to as a meeting request) to anyone who has an email account—even to a person who doesn’t use Outlook. You can send a meeting request from any type of email account (such as an Exchange account or an Internet email account).

The meeting window has two pages: the Appointment page and the Scheduling Assistant page. The Appointment page is visible by default. You can enter all the required information directly on the Appointment page, or use the additional features available on the Scheduling Assistant page to find the best time for the meeting.

![The Appointment page of a meeting window](image-url)
The Room Finder is open by default on the right side of each page of the meeting window. This handy tool helps you to identify dates and times that work for the greatest number of attendees, in addition to available locations. The monthly calendar at the top of the Room Finder indicates the collective availability of the group on each day, as follows:

- Dates that occur in the past and nonworking days are unavailable (gray).
- Days when all attendees are available are Good (white).
- Days when most attendees are available are Fair (light blue).
- Days when most attendees are not available are Poor (medium blue).

TIP All the capabilities of the Room Finder are available for Exchange accounts, but functionality is limited for other types of accounts. You can display or hide the Room Finder pane by clicking the Room Finder button in the Options group on the Meeting tab.

Managed conference rooms that are available at the indicated meeting time are shown in the center of the Room Finder. At the bottom of the Room Finder pane, the Suggested Times list displays attendee availability for appointments of the length of time you have specified for the meeting.

Selecting a date in the calendar displays the suggested meeting times for just that day. (Scheduling suggestions are not provided for past or nonworking days.) Clicking a meeting time in the Suggested Times list updates the calendar and the meeting request.

People you invite to meetings are referred to as attendees. By default, the attendance of each attendee is indicated as Required. You can inform noncritical attendees of the meeting by marking their attendance as Optional. You can invite entire groups of people by using a contact group or distribution list. You can also invite managed resources, such as conference rooms and audio/visual equipment, that have been set up by your organization’s Exchange administrator.

A meeting request should have at least one attendee other than you, and it must have a start time and an end time. It should also include a subject and a location, but Outlook will send the meeting request without this information if you specifically allow it. The body of a meeting request can include text and web links, and you can also attach files. This is a convenient way to distribute meeting information to attendees ahead of time.
Chapter 9: Manage scheduling

The secondary page of the meeting window is the Scheduling Assistant page, if your email account is part of an Exchange Server network. Otherwise, the secondary page is the Scheduling page, which doesn’t include the Room Finder feature.

If you’re organizing a meeting for a large number of people, you can view collective information about their schedules on the Scheduling or Scheduling Assistant page.

The Scheduling and Scheduling Assistant pages include a group schedule that shows the status of each attendee’s time throughout your working day. Outlook indicates your suggested meeting time on the group schedule. If free/busy information is available for meeting attendees, the status is indicated by the standard free/busy colors and patterns that match the legend at the bottom of the page. If no information is available (either because Outlook can’t connect to an attendee’s calendar or because the proposed meeting is further out than the scheduling information stored on the server), Outlook shows the time with gray diagonal stripes. The row at the top of the schedule, to the right of the All Attendees heading, indicates the collective schedule of all the attendees.
You can change the time and duration of the meeting to work with the displayed schedules by selecting a different time in the Start Time and End Time lists, by dragging the vertical start time and end time bars in the group schedule, or by clicking the time you want in the Suggested Times list.

Outlook tracks responses from attendees and those responsible for scheduling the resources you requested, so you always have an up-to-date report of how many people will attend your meeting. The number of attendees who have accepted, tentatively accepted, and declined the meeting request appears in the meeting header section when you open a meeting in its own window.

You might find it necessary to change the date, time, or location of a meeting after you send the meeting request, or to add or remove attendees. As the meeting organizer, you can change any information in a meeting request at any time, including adding or removing attendees, or canceling the meeting. Meeting attendees receive updates. Changes to meeting details are tracked so that attendees can quickly identify them.

**To open a new meeting window**

1. Do any of the following:
   - On the **Home** tab of the Calendar module, in the **New** group, click **New Meeting**.
   - On the **Home** tab of any module, in the **New** group, click **New Items**, and then click **Meeting**.
   - In any module, press **Ctrl+Shift+Q**.
To create a meeting request

1. Open a new meeting window.
2. In the To box, enter contact information for the attendees.
3. In the Subject box, enter an identifying name for the meeting.
4. In the Location box, enter the meeting location. If your organization uses Skype for Business, you can click the Skype Meeting button on the Meeting toolbar to enter Skype meeting information in the Location box and content pane.
5. In the Start time row, enter or select a date and time. Outlook automatically sets the End Time to a half hour after the start time.
6. In the End time row, enter or select a date and time. A meeting can span overnight or across multiple days.

A basic meeting request

7. Verify the meeting details, and then click the Send button to add the meeting to your calendar and send the meeting request to the attendees.
To identify times that colleagues are available for meetings

IMPORTANT This procedure is for Outlook users with Exchange email accounts. Free/busy time is available only for attendees in your organization or another connected organization, or attendees that share free/busy information through a web service.

1. On the Meeting tab, in the Show group, click the Scheduling Assistant button. The All Attendees list on the Scheduling Assistant page includes you and any attendees you entered in the To box. The icon next to your name, a magnifying glass in a black circle, indicates that you are the meeting organizer. The icon next to each attendee’s name, an upward-pointing arrow in a red circle, indicates that he or she is a required attendee.

TIP If you’re inviting someone as a courtesy, you can indicate that he or she does not need to attend by clicking the Required Attendee icon to the left of the attendee’s name and then, in the list, clicking Optional Attendee.

2. If necessary, scroll to the bottom of the Room Finder to display the Suggested times list. The times shown are based on your schedule and the schedule information that is available for the attendees.

3. To add attendees, enter their email addresses in the All Attendees list, and then press Tab to update the Suggested Times list in the Room Finder.

4. If you need to change the meeting time or duration, you can do so by dragging the start time and end time bars on the group schedule or by entering times in the boxes below the group schedule.

5. Click the Appointment button in the Show group to return to the Appointment page, which reflects the current attendees and meeting times.

6. Verify the meeting details, and then click the Send button to add the meeting to your calendar and send the meeting request to the attendees.
To edit a meeting request

1. Open the meeting window for editing.
2. If the meeting is one of a series (a recurring meeting), Outlook prompts you to indicate whether you want to edit the meeting series or only the selected instance of the meeting. Click Just this one or The entire series.
3. Modify the date, time, notes, options, or attendees. Then click the Send Update button.
4. If you modified the attendees, Outlook prompts you to specify whether to send updates to all attendees or only to the changed attendees. Click one of the following to send the meeting updates:
   - Send updates only to added or deleted attendees
   - Send updates to all attendees

**TIP** You don’t need to cancel and reschedule a meeting to change the date or time, or to add or remove an attendee. You can edit the meeting request, remove the attendee, and then send a meeting update to the affected attendees.

To cancel a meeting or a meeting occurrence

1. Select the meeting on your calendar, or open the meeting window.
2. Do either of the following:
   - On the Meeting tool tab, in the Actions group, click the Cancel Meeting button.
   - On the Meeting Series tool tab, in the Actions group, click the Cancel Meeting button, and then click Cancel Occurrence or Cancel Series.

**TIP** The Cancel Meeting button is available only for meetings that you organize, not for meetings you’re invited to.

A meeting window containing cancellation information opens.
3. Do either of the following:

- In the meeting header, click the **Send Cancellation** button. Outlook sends an updated meeting request to the attendees and removes the meeting from their calendars.

  If you change your mind about cancelling the meeting, click the **Close** button (X) at the right end of the message window title bar. Outlook reminds you that you haven’t sent the cancellation and provides options. In the message box that appears, click **Don’t cancel the meeting and close**, and then click **OK**.

  ![Microsoft Outlook error message]

  *You can’t cancel a meeting without notifying the attendees*
Respond to meeting requests

When you receive a meeting request from another Outlook user, the meeting appears on your calendar with your time scheduled as Tentative. Until you respond to the meeting request, the organizer doesn’t know whether you plan to attend.

A meeting request in the Reading Pane

The meeting request displays your current calendar information at the time of the meeting, so you are aware of any schedule conflicts at that time. You can respond to a meeting request in one of these four ways:

- **Accept the request**  Outlook deletes the meeting request and adds the meeting to your calendar.

- **Tentatively accept the request**  This option indicates that you might be able to attend the meeting but are undecided. Outlook deletes the meeting request and shows the meeting on your calendar as tentatively scheduled.

- **Propose a new meeting time**  Outlook sends your request to the meeting organizer for confirmation and shows the meeting with the original time on your calendar as tentatively scheduled.

- **Decline the request**  Outlook deletes the meeting request and removes the meeting from your calendar.
If you don’t respond to a meeting request, the meeting remains on your calendar with your time shown as tentatively scheduled and the meeting details in gray font rather than black.

When accepting or declining a meeting, you can choose whether to send a response to the meeting organizer. If you don’t send a response, your acceptance will not be tallied, and the organizer will not know whether you are planning to attend the meeting. If you do send a response, you can add a message to the meeting organizer before sending it.

**To respond to a meeting request**

1. In the meeting window, in the **Reading Pane**, or on the shortcut menu that appears when you right-click the meeting request, click Accept, Tentative, or Decline.

2. Choose whether to send a standard response, a personalized response, or no response at all.

**To propose a new time for a meeting**

1. In the meeting window or in the **Reading Pane**, click Propose New Time, and then in the list, click Tentative and Propose New Time or Decline and Propose New Time to open the Propose New Time dialog box.

You can respond to a meeting request by proposing a different meeting time
2. In the Propose New Time dialog box, change the meeting start and end times to the times you want to propose, either by dragging the start time and end time bars or by changing the date and time in the lists, and then click the Propose Time button.

3. In the meeting response window that opens, enter a message to the meeting organizer if you want to, and then click Send to send your response and add the meeting to your calendar as tentatively scheduled for the original meeting time. If the meeting organizer approves the meeting time change, you and other attendees will receive updated meeting requests showing the new meeting time.

Display different views of a calendar

Just as you can with other Outlook modules, you can specify the way that Outlook displays calendar information (the view) and the attribute by which that information is arranged (the arrangement).

The Calendar module has these four content views:

- **Calendar** This is the standard view in which you display your Outlook calendar. In the Day, Work Week, or Week arrangement, Calendar view displays the subject, location, and organizer (if space allows) of each appointment, meeting, or event, in addition to the availability bar and any special icons, such as Private or Recurrence.

- **Preview** In the Day, Work Week, or Week arrangement, Preview view displays more information, including information from the notes area of the appointment window, as space allows.

- **List** This list view displays all appointments, meetings, and events on your calendar.

- **Active** This list view displays only future appointments, meetings, and events.

When working in a list view, you can group calendar items by selecting a field from the Arrangement gallery on the View tab.

**IMPORTANT** In this book, we assume you are working in Calendar view, and refer to the standard Calendar view arrangements as Day view, Work Week view, Week view, Month view, and Schedule view.
The available arrangements vary based on the view. In Calendar view and Preview view, the arrangements are based on the time span, and include the following:

- **Day**  Displays one day at a time separated into half-hour increments.
- **Work Week**  Displays only the days of your work week. The default work week is Monday through Friday from 8:00 A.M. to 5:00 P.M. Time slots that fall within the work week are white on the calendar; time slots outside of the work week are colored.

![SEE ALSO](For information about modifying the days and hours of the work week shown in Outlook, see “Define your available time” in Chapter 10, “Manage your calendar.”)

- **Week**  Displays one calendar week (Sunday through Saturday) at a time.
- **Month**  Displays one calendar month at a time, in addition to any preceding or following days that fall into the displayed weeks.
- **Schedule view**  Displays a horizontal view of the calendar for the selected time period. You can add other people’s calendars as rows in this view, so that you can easily compare multiple calendars for specific time periods.

![Schedule view for a group of co-workers](

Schedule view for a group of co-workers)
This arrangement is very useful for comparing limited time periods for multiple calendars, such as those of the members of a calendar group.

**SEE ALSO** For information about calendar groups, see “Share calendar information” in Chapter 10, “Manage your calendar.”

You switch among arrangements by clicking the buttons in the Arrangement group on the View tab of the Calendar module ribbon.

**TIP** If you’ve made changes to any view (such as the order in which information appears) and want to return to the default settings, click the Reset View button in the Current View group on the View tab. If the Reset View button is unavailable, the view already displays the default settings.

*In this view, you can display your entire work week at one time*
You can use these additional tools to change the time period shown in the calendar:

- Display the previous or next time period by clicking the Back button or the Forward button next to the date or date range in the calendar header.
- Display the current day by clicking the Today button in the Go To group on the Home tab.
- Display a seven-day period starting with the current day by clicking the Next 7 Days button in the Go To group on the Home tab.
- Display week numbers to the left of each week in Month view and in the Date Navigator. If you implement this option, you can click the week tab to display that week.

**TIP** Specific weeks are referred to in some countries or regions by number to simplify the communication of dates. (For example, you can say you’ll be out of the office “Week 24” rather than “June 7–11.”) Week 1 is the calendar week in which January 1 falls, Week 2 is the following week, and so on through to the end of the year. Because of the way the weeks are numbered, a year can end in Week 52 or (more commonly) in Week 53. To display week numbers in the Date Navigator and in the Month view of the calendar, select the Show Week Numbers... check box on the Calendar page of the Outlook Options dialog box.

To display your calendar for a month

1. Do either of the following:
   - On the Home tab, in the Arrange group, click the Month button to display your calendar for the month.
   - Press Ctrl+Alt+4.

To navigate in Month view

1. Do either of the following:
   - To the left of the date range in the calendar header, click the Forward button to move the calendar forward one month, or the Back button to move the calendar back one month.
   - On the View tab, in the Current View group, click the Change View button and then, in the gallery, click Preview to display additional details on the monthly calendar.
Use the Date Navigator

By default, the Outlook 2016 Calendar module displays the current month and next month in the Date Navigator at the top of the Folder Pane. These compact monthly calendars provide quick indicators of the current date, the time period that is displayed in the content pane, days that you are free, and days that you are busy.

The current date is indicated by a blue square. The date or dates currently displayed in the calendar are indicated by light blue highlighting. Bold dates indicate days with scheduled appointments, meetings, or events. Days of the preceding and following months appear on the two default calendars in gray.

You can display more or fewer months by changing the width or height of the area allocated to the Date Navigator. To change the size of the Date Navigator area, do either of the following:

- Drag the right edge of the Folder Pane to the right to increase the width, or to the left to decrease the width.
- Drag the horizontal border below the Date Navigator calendars down to increase the height, or up to decrease the height.
The Date Navigator displays each month in seven-day weeks. The first day of the week shown in the Date Navigator is controlled by the First Day Of Week setting on the Calendar page of the Outlook Options dialog box. When the Date Navigator displays more than one month, each month shows either five or six weeks at a time—whichever is necessary to show all the days of the currently selected month.

You can display a specific day, week, month or range of days in the calendar by selecting it in the Date Navigator. When you’re displaying the Calendar in the Week arrangement, selecting a day displays the week that contains it. Otherwise, the Calendar arrangement changes to show the time period that you select.

Use these techniques to work with the Date Navigator:

- To display a day, click that date.
- To display a week, point to the left edge of the week; when the pointer direction changes from left to right, click to select the week. (You can configure the Calendar Options to display week numbers in the Date Navigator and Calendar. If you do, clicking the week number displays the week.)
- To display a range of days (from two days to a maximum of six weeks), point to the first date you want to display and then drag across the Date Navigator to the last date.
- To change the period of time displayed in the calendar one month at a time, click the Previous or Next arrow on either side of the month name, at the top of the Date Navigator.
- To move multiple months back or forward, press the month name, and then drag up or down on the list that appears.
To display a seven-day week in the calendar
1. In the Date Navigator at the top of the Folder Pane, point to the left edge of a calendar row that contains one or more bold dates.
2. When the cursor changes to point toward the calendar, click once to display the selected seven-day week in the calendar.

To display your work week schedule
1. Do either of the following:
   - On the Home tab, in the Arrange group, click the Work Week button.
   - Press Ctrl+Alt+2.
   The first time slot of your defined work day appears at the top of the pane. Time slots within your work day are white; time slots outside of your work day are shaded.

To display your calendar for a day
1. On the View tab, in the Arrangement group, click the Day button to display only the selected day’s schedule.

To display today’s schedule
1. On the Home tab, in the Go To group, click the Today button. If the calendar wasn’t previously displaying the current week, it does so now. The times displayed remain the same. The current day and the current time slot are highlighted.

To display your task list on the Calendar
1. On the View tab, in the Layout group, click the Daily Task List button and then do any of the following:
   - Click Normal to display the task list area below the calendar.
   - Click Minimized to display a single row below the calendar. The minimized Daily Task List displays a count of your total, active, and completed tasks for the day.
   - Click Off to hide the task list.

TIP The Daily Task List is available in the Day, Work Week, or Week arrangement of the Calendar. It is not available in Month view or Schedule view.
To return the calendar to its default settings

1. In the Change View gallery, click Calendar to return the calendar to its default settings.

2. Then in the Current View group, click Reset View to return to the default calendar state.

Skills review

In this chapter, you learned how to:

- Schedule appointments and events
- Convert calendar items
- Configure calendar item options
- Schedule and change meetings
- Respond to meeting requests
- Display different views of a calendar
Practice tasks

No practice files are necessary to complete the practice tasks in this chapter.

IMPORTANT As you work through the practice tasks in this book, you will create Outlook items that might be used as practice files for tasks in later chapters. If you haven’t created specific items that are referenced in later chapters, you can substitute items of your own.

Schedule appointments and events

Start Outlook, display your Calendar, and then perform the following tasks:

1. Create a new appointment with the subject **SBS Study Session**, and configure it as follows:
   - Set the date to one week from today.
   - Set the time from **11:30 A.M.** to **12:30 P.M.**
   - Specify the location as **Library Meeting Room**.
   - Keep all other default settings, and save and close the appointment.

2. Create a new all-day event named **National Dessert Day**, and configure it as follows:
   - Set the date to the next occurrence of **October 14**.
   - Keep all other default settings, and save and close the event.

Convert calendar items

Display your Inbox, and then perform the following tasks:

1. Locate the **SBS Test** message that you sent to yourself in Chapter 3, “Send and receive email messages.”

2. Create an appointment based on the message, and configure it as follows:
   - Change the subject from **SBS Test** to **SBS Rafting Trip**.
   - Set the date to next Saturday, and the time from **11:00 A.M.** to **2:00 P.M.**
   - Specify the location as **To Be Determined**.
   - Keep all other default settings, and save and close the appointment.

3. Display your Calendar.
4. Locate the **SBS Rafting Trip** appointment, and then do the following:
   - Convert the appointment to an all-day event.
   - Keep all other default settings, and save and close the event.

5. Locate the **SBS Rafting Trip** event, and then do the following:
   - Invite a friend to the event.
   - In the content pane, enter *I’m practicing my Outlook scheduling skills. Please accept this invitation.*
   - Send the event invitation.

**Configure calendar item options**

Display your Calendar, and then perform the following tasks:

1. Locate the **SBS Study Session** appointment that you created in the first set of practice tasks for this chapter.
2. Open the appointment window, and display the time zone controls.
3. Change the **Start time** and **End time** to occur in a time zone that is one hour earlier than your own.
4. Set your availability during the appointment to **Out of Office**.
5. Set a reminder for **1 hour** before the appointment.
6. Configure the appointment to recur **Monthly**, on the **first Monday** of each month, and to end after **3** occurrences.
7. Save and close the appointment series.

**Schedule and change meetings**

This practice task is designed for Outlook users in Exchange environments.

Display your Calendar, and then perform the following tasks:

1. Create a new meeting with the subject **SBS Project Review**, and configure it as follows:
   - Invite a colleague from your Exchange network.
   - Specify the location as **My Office**.
   - Set the date to next Thursday.
2. In the Room Finder, look at the Date Navigator and scroll the Suggested Times list for information about availability. In the Suggested times list, click a half-hour time slot that shows No conflicts.

3. Display the Scheduling Assistant page of the meeting invitation, and do the following:
   - Wait for the group calendar to display your colleague’s availability. Notice the color blocks that identify the working hours and availability of each person and of the group.
   - Verify that the selected time is shown as available for both of you. If it isn’t, change the time by dragging the start and end time markers.

4. Return to the Appointment page of the meeting invitation and verify the meeting information. In the content pane, enter I’m practicing scheduling meetings. Please accept this meeting request. Then send the meeting invitation.

5. On your calendar, locate the SBS Project Review meeting, and open the meeting window.

6. Display the Scheduling Assistant page of the meeting window, and do the following:
   - Add another colleague to the attendee list, and wait for the group calendar to display his or her availability.
   - Scroll the group calendar backward and forward a few days to identify times that you and your colleagues are busy or out of the office.
   - If necessary, change the meeting time and date by selecting them in the area below the group calendar.

7. Return to the Appointment page of the meeting invitation and verify the meeting information. Then send the meeting update to all attendees.
Respond to meeting requests

This practice task is designed for Outlook users in Exchange environments.

Display your Inbox, and then perform the following tasks:

1. Ask a colleague to send you a meeting request.
2. When you receive the meeting request, review the information in the Reading Pane, and then open the meeting request.
3. From the meeting request window, display your calendar. Notice the colors and patterns that represent the unaccepted meeting request and your availability during that time.
4. Return to the meeting request. Respond as Tentative, and propose a new time for the meeting.

Display different views of a calendar

Display your Calendar in Calendar view, and then perform the following tasks:

1. Display your calendar for the current month.
2. In the Date Navigator, notice the shading that identifies the current day. Click a different day that shows no appointments, to display your calendar for only that day. Then click the Next Appointment bar on the right side of the day to display the day of the next appointment on your calendar.
3. Switch to the Work Week calendar arrangement, and turn on the display of the Daily Task List below the calendar.
4. Change to the Active view of your calendar to display only your future appointments, events, and meetings.
5. If you want to, add the holidays from your country or region to the calendar. Notice the change in the calendar content displayed in the Active view.
6. Configure the Calendar to display the view and arrangement that you like best.
Index

A
accounts  See email accounts
Action Items add-in  140
actions  See rule actions; rules
Active view (Calendar module)  316
add-ins
  definition  541
  installing  474
  managing  471–473
  security issues  471
  sources  471–472
address books  217
  See also People module
  changing search order  81–82
  as contact source  220–221
  copying contact records  260
  creating  256–259
  creating contact records  218–219
  creating messages from  237
  default  256
  definition  541
  deleting  260
  displaying contact records  242
  displaying in People module  238
  moving contact records among  259
  populating  258
  printing contact records  249–250
  selecting message recipients  235–237
  views  238–245
address lists
  searching  82
  troubleshooting  79
address resolution  74, 78
aliases  74
All Items list, filtering  107
app windows
  See also windows
  adjusting sizes  9
  backgrounds  24
  changing backgrounds  26
  changing color schemes  26
  hiding  9
  maximizing  20
  personalizing  24–25, 408
status bar  14
appointment windows  292, 541
appointments  57, 292, 298
  conflicting  292–293
  converting into events  298–299
  converting into meetings  300
  creating by using Quick Steps  497
  creating from messages  298–299, 497
  creating recurrences  305
  default availability  301
  definition  541
  displaying on calendars  293
  editing  295
  font restrictions  122
  indicating availability  304
  InfoBar  293
  modifying  304
  opening new appointment windows  294
  recurring  301–302, 305
  reminders, changing default  304
appointments (continued)
scheduling 292–296
sizing handles 295
specifying time zones 335
time zones 300–301, 303
archiving items 468, 471
arrangements, definition 541
assigned tasks, status reports 393
assigning tasks 387–390
attachments
arranging messages by 194
copies of online files 93
displaying 98–100
forwarded messages 109
modifying 89
opening in default app 101
Outlook items 94
photographs 137
previewing 98–100
removing 89, 93
returning from previewing 101
saving to storage drives 101–102
scanning for viruses 100
Blank template, creating rules from 494
blind courtesy copies 74
blocking messages
configuring settings 164
from specific domains 170
junk email filtering 154–155, 157–158
branches, conversations 189
buttons, integrated arrows 12
B
Backstage view
commands 10–13
displaying 10
keyboard shortcuts 523–524
message commands 54
Bcc field 74, 76
blank template, creating rules from 494
blind courtesy copies 74
blocking messages
configuring settings 164
from specific domains 170
junk email filtering 154–155, 157–158
branches, conversations 189
buttons, integrated arrows 12
attributes of messages 194–198
availability
changing visible details 353
sharing 346–358, 347
viewing for co-workers 337
available time, setting 330
attributes of messages 194–198
availability
changing visible details 353
sharing 346–358, 347
viewing for co-workers 337
available time, setting 330
availability
changing visible details 353
sharing 346–358, 347
viewing for co-workers 337
available time, setting 330
Cached Exchange Mode
   definition 541
   enabling 107

calendar details
   changing default settings 353
   printing 360

calendar groups
   creating 340
   deleting 341
   removing calendars 341
   renaming 340

calendar information
   sharing 346–358
   sharing externally 356–358

calendar item views 316–323

calendar items
   appointments 293, 298
   assigning importance 303
   configuring options 300–305
   converting 298–300
   creating recurrences 305
   definition 541
   events 293
   indicating availability 301, 304
   inserting images 138
   keyboard shortcuts 527–530
   modifying 304
   privacy 302
   recurring 301–302
   reminders 301, 304
   time zones 300, 303

Calendar module 55
   adding shared calendars 351
   calendar item windows 57–58
   definition 541
   delegating control 353
   displaying 35
   displaying co-workers’ calendars 338
   keyboard shortcuts 527–530
   ribbon tabs 56–57
   scheduling items 58
   Shared Calendars list 339
   views 316–323

Calendar peek 412, 541

calendar permissions
   assigning 347
   modifying 351–353

calendar properties, displaying 351

Calendar view (Calendar module) 293, 316

calendars
   See also time zones; work week
   adding holidays 296–297
   arrangements 317–319
   assigning permissions 347
   changing displayed time period 319
   closing 346
   closing shared 339
   configuring options 457–460
   connecting to 291, 337
   copying items to other calendars 344
   creating groups 340
   custom 336
   date areas 293
   Day arrangement 317
   defining available time 330–331
   definition 541
   displaying/hiding 345
   displaying multiple 342–346
   displaying side by side 337, 344
   displaying specific timeframes 322, 331
   displaying task lists 322
   displaying those of co-workers 338
   displaying time zones 334
   displaying today’s schedule 322
   displaying Weather Bar 460
Call or Call All message responses

calendars (continued)
  displaying week numbers 319
  Internet 336
  list view 316
  navigating in month view 319
  print preview 361
  print styles 360
  printing 359–364
  privacy indicator 302
  publishing online 358
  reminder icon 301
  reminders 460
  removing from calendar groups 341
  removing holidays 297
  resetting views 318
  returning to default settings 323
  Schedule view arrangement 317
  ScreenTips 293
  sending by email 356
  shared 336
  SharePoint 336, 341
  sharing 346–358
  sharing with co-workers 348
  specifying time zones 333–334
  time slots 293
  time zone options 458–459
  views 316–319, 316–323, 322–323
  working with multiple 336–346

Call or Call All message responses 110

categories
  See also messages
  appointments 303
  arranging messages by 195
  assigning 198, 204
  assigning by using Quick Steps 497
  assigning colors 200
  assigning shortcut keys 200
  assigning to notes 202
  colors 198
  conversations 200
  creating 200, 205
  definition 541
  deleting 206
  displaying Categorize menu 201
  elements 200
  events 303
  filtering by 201
  grouping items by 201
  holidays 297
  meetings 303
  naming 200
  Quick Click 200, 204, 206
  removing 205
  renaming 199, 205–206
  as search criteria 198
  sorting by 201
  of tasks 372
  viewing in Reading Pane 200

Categorize menu 201

Cc field 74, 76
changing message status by using Quick Steps 497

character styles 129
charts, creating in messages 138–139
chiclets 103
cleaning up conversations 192
Click Here To Add A New Task 370, 374
client rules, definition 541
clip art, definition 541
Clipboard 133, 541
closing calendars 339, 346
cloud storage locations, connecting/disconnecting 26–27
Clutter folder 37
color schemes
  changing 26
  messages 128
color categories  See categories
colors, notes 202
columns
  adding to list views 43–45
  removing from list views 46
  reordering in list views 46
  resizing in list views 244
COM (Component Object Model)
  add-ins 471–474
commands
  adding to custom groups 424
  adding to Quick Access Toolbar 417–418
  removing from tabs 422
comments, changing user identification 442
Completed status 371, 385
completed tasks 394
conditions  See rule conditions; rules
connections
  configuring automatically 512–514
  configuring manually 514–517
  managing existing 518–519
  troubleshooting 510–511
contact cards
  definition 542
  initiating contact from 106–107
  message participants 103–106
  pinning 104
contact folders  See address books
contact groups
  adding existing contacts 271–273
  adding new contacts 273–274
  creating 268–270
  definition 542
  expanding in message address fields 275
  removing members 275
sharing 274
  updating contact information 274
contact index, definition 542
contact lists, definition 542
contact record windows 61, 223–225
  creating Outlook items 234
  definition 542
  displaying information 234
  editing contact information 231
  initiating actions from 233
  initiating communication from 234
  opening new 226
contact records 61
  See also People module; electronic business cards
  changing filing order 227
  copying to address books 260
  creating 219, 222–225
  creating from message headers 226
  creating in list views 226
  creating with same company information as existing 231
  custom fields 232
  definition 542
  displaying different views 238, 240–242
  displaying social network photos 462
  editing People card information 230
  entering basic information 227
  entering details 230
  entering notes 229
  exporting 260–262
  exporting to .csv files 266–267
  exporting to Outlook Data Files 267–268
  filing order 462
  font restrictions 122
  formatting names 462
  grouping in list views 244
  IM addresses 228
contacts

contact records (continued)
importing 260–262
importing from .csv files 263–265
importing from Outlook Data File (.pst) 265–266
inserting images 138
keyboard shortcuts 530–532
linking 238–239
linking to OneNote pages 234–235
looking up from message windows 236–237
modifying 222–223
moving among address books 259
name and address standards 225
options 461
pages 218–219
personalizing 279–284
printing 245
print preview 247–248, 251
print styles 246–247
resetting view to default 245
ribbon tabs 62
saving multiple email addresses 227–228
saving multiple postal addresses 229
saving phone numbers 228–229
scrolling 59
searching 275–278
selecting languages 59
sorting in list views 244
sources 220–221
specifying compact view settings 244
views 60, 238–245
webpages 228

contacts
See also contact records
definition 541
content area, definition 542

context menus See shortcut menus
contextual tabs See tool tabs
Contributor role 347–348
control, delegating 348, 353–355
Conversation view 47, 188–189, 191
Conversation Clean Up 449
Conversation History folder 37
conversations 188
See also messages
benefits of using 189
branches 189
cleaning up 190, 192–193, 449
definition 542
deleting 190
deleting messages from folders 190–193
displaying 47
displaying all messages 188, 190
displaying color categories 200
displaying message lists 192
displaying messages 192
displaying messages in any folder 190
displaying most recent messages 188
expanding 188–190
headers 188, 190
history 106
ignoring 190, 194
indenting older messages 190
moving from folders 209
multiple responses 189
participants 105
selecting all messages 189, 192
sent messages 189–190
stop ignoring 194
unique messages 188
unread messages 189
copying calendar items 344
courtesy copies 74
co-workers
   creating calendar groups 340
displaying calendars 338
sharing calendar details 353
viewing availability 337
creating appointments
   by using Quick Steps 497
   from messages 497
creating tasks
   due today 373
   from the To-Do List 374
   without a due date 374
CSV files 266–267
cursors, definition 542
custom calendars, displaying 336

c
daily calendar, printing 360
Daily Task List 400–401
date areas on calendars 293
Date Navigator
definition 542
   keyboard shortcuts 528
Day view
calendar arrangement 317
   keyboard shortcuts 529
deprecated tasks 391
decrypting messages 181
default task due dates, changing 380
default views, resetting to 399
Deferred status 371, 385
deleagring control of a calendar 348, 353–355
Deleted Items folder 37, 470
delete permissions 347, 353
delimited text files See separated text files
delivery options 139–142
delivery receipts, requesting 144
desktop alerts, definition 542
details, restricting when sharing calendars 347
dialog box launchers, definition 542
dialog boxes, keyboard shortcuts 536–537
dictionaries, language options 466
digital IDs
   exporting 179
   importing 180
   obtaining 176–177
   using installed certificates 178
digitally signing messages 180–182
digital signatures, definition 542
distribution lists 105, 542
document workspaces, definition 543
domains, definition 543
Done (Quick Step) 496, 498
drafting responses 53
drafts
   automatic saving increments 85
   changing save frequency 452
   definition 543
   modifying messages 86–87
   saving messages as 82–83, 85–86, 452
Drafts folder 37
due dates
   changing default 380
   for tasks 371

e
ebook edition xv
Editor role 347–348, 354
electronic business cards
   See also contact records
   adding pictures 281
   changing text 282–283
   formatting text 284
email

electronic business cards (continued)
  keyboard shortcuts  531
  modifying label display  283
  modifying layout  281–282
  personalizing  279–284
  resetting to default  284
email
  See also messages
definition  543
email accounts
  applying rules to multiple  493, 495
  arranging messages by  194
  configuring automatic connections  512–514
  configuring manual connections  514–517
  connecting to  506–508
  managing existing connections  518–519
  starting initial connections  508
  supported types  505–506
email addresses
  comma separators  81
  removing from Auto-Complete List  80
email messages, definition  543
email rules See rules
email security options  174–175
email servers, definition  543
E-mail Signature tab, displaying  133
email trails, definition  543
emailing calendars  356
encrypted connections, troubleshooting  511
encrypting messages  141, 183
encryption, definition  543
entertainment calendars  337
errata, submitting  xvi
event windows, definition  543
events  292
  converting to appointments  300
  converting to invited events  300
creating recurrences  305
definition  543
displaying on calendars  293
holidays  296–297
indicating availability  304
invited  298
modifying  304
recurring  301–302
reminders, changing default  304
scheduling  293, 298
time zones  300–301
exceptions
  adding to rules  492
  for rules  490
Exchange accounts
  calendars, displaying  336
  connecting to  505
  sharing calendars  337
Exchange ActiveSync accounts  505
Exchange calendars, viewing availability  337
expiring messages  145
exporting contact records  260–262
external sharing of calendar information  356
F
Facebook, connecting to  25
Favorites list  36, 38
faxing messages  92
feedback, submitting  xvi
fields, in messages  73
file types
  Internet calendars  338
  Outlook Data Files  267
  separated value files  266
files
  attaching to messages  88–91
  keyboard shortcuts  521–522
sending from File Explorer  88, 93
sending from Office apps  88, 91–92
filing messages by using Quick Steps  497
filtering
  All Items list  107
  by categories  201
  definition  543
  junk messages  155, 165
finding/replacing content, keyboard shortcuts  540
flagged items
  changing follow-up date  384
  deleting  386–387
  marking as complete  385–386
  opening from Tasks peek  384
  removing flags  387
flagging items
  messages  141, 146–147, 497
  tasks  377–378
flags
  arranging messages by  195
  marking as complete  387
  removing from flagged items  387
Flickr, connecting to  25
Folder commands  40
folder contacts  353
folder owners  353
Folder Pane
  changing width  410
  configuring  409
  definition  543
  hiding/displaying  409
Other Calendars list  341
Shared Calendars list  339
working from minimized  410
working with favorites  410
folders
  creating for tasks  381
  displaying alphabetically  39
  message, creating  208–209
  moving conversations from  209
  moving messages to  208–209
  working with favorites  410
Folders list
  definition  543
  displaying  39
follow-up dates, changing  384
font effects, turning on/off  121
fonts
  changing based on conditions  428–429
  changing for table view  426–428
  character widths  121
  customizing for user interface  425–431
HTML messages  122
lowercase letters  121
message headers  122
numbers  121
outgoing messages  125
plain text messages  122
previewing  122
setting defaults  120–121
stationery  124
uppercase letters  121
formatting
  global  120
  local  120
  message responses  120
  messages  50, 72, 76–77, 120–126, 456
  saving preferences  120
  signatures  132–133
Forward As Attachment message responses  109
Forward message responses  109
forwarding messages  109, 114
GAL (Global Address List)

G
GAL (Global Address List)
  as contact source  221
  definition  543
  displaying  258

galleries 13
  definition  543
  keyboard shortcuts  539

Global Address List (GAL)
  as contact source  221
  definition  543
  displaying  258, 339

global formatting  120

group buttons on ribbon  16

groups  See calendar groups; Office 365 Groups; ribbon groups

H
header options for Office 365 groups  461
headers 188
  conversations  188, 190
  drafts  83
  font restrictions  122
  icons  96
  messages  74, 96

Help
  keyboard shortcuts  540
  Tell Me What You Want To Do box  15

holiday calendars  337

holidays
  adding to calendars  296–297
  categories  297
  removing from calendars  297

HTML, definition  544
HTTP, definition  544
hyperlinks, definition  544

I
ICS files  338, 342

ignoring conversations  190, 194

IM  See instant messaging

IM addresses, saving in contact records  228

images
  adding to signatures  135–136
  inserting into messages  138
  screen captures in messages  137

IMAP (Internet Message Access Protocol)  506, 544

IM (instant messaging), definition  544

Import And Export Wizard  261, 263

importing
  contact records  260–265
  Internet calendars  338, 342

Inbox  37
  configuring junk email settings  164
  processing messages by using Quick Steps  496
  running rules on existing items  493, 495

incoming messages
  evaluating conditions  492
  performing actions  492
  processing by using rules  488

InfoBar  293
  Automatic Replies  484
  definition  544

InfoPath forms, keyboard shortcuts  535

information bar  544

Information Rights Management (IRM)  184, 544

In Progress status  371, 385

Inside My Organization, automatic replies  482

instant messaging (IM), definition  544
Internet calendars
    displaying 336
    file types 338
    importing 338
    manually importing or subscribing 342
    subscribing to 338
Internet Message Access Protocol (IMAP) 506, 544
invited events 298, 300
IRM (Information Rights Management) 184, 544

J
jelly beans 103
Junk Email folder 37
    displaying 161
    emptying 164
    managing messages 158–160
junk messages
    blocking 169
    blocking specific character encoding 170
    blocking specific domains 170
categories 154
    configuring options 165–168
definition 544
deleting 164
deleting automatically 166
filtering 155, 165
safe senders 169
setting protection levels 168–169
trusting senders/recipients 164
valid, moving 161–163
justifying, definition 544

K
keyboard shortcuts
    for categories 200
definition 544
    for Quick Steps 500
    Office 2016 535–540
    Outlook 2016 521–535

L
labels, electronic business cards 283
language packs 466
languages
    configuring options 463–464, 469
    selecting for contacts 59
LinkedIn, connecting to 25
List view (Calendar module) 316
list views
    adding columns 43–45
    removing columns 46
    reordering columns 46
Live Preview 13
definition 544
    enabling/disabling 442

M
macros, keyboard shortcuts 535
magnification, changing 14
Mail module
    adding folders to Favorites list 38
    alphabetizing folders 39
    displaying 35
    displaying different views 43
    Favorites list 36
    folders 36–38
    hiding panes 42
    keyboard shortcuts 526–527
    ribbon tabs 39–41
    views 41–43
MailTips 454–455, 481
maximizing windows 20
<table>
<thead>
<tr>
<th>Topic</th>
<th>Page(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting requests</td>
<td>110, 306</td>
</tr>
<tr>
<td>- Accepting</td>
<td>314</td>
</tr>
<tr>
<td>- Creating</td>
<td>310</td>
</tr>
<tr>
<td>- Creating from messages</td>
<td>108</td>
</tr>
<tr>
<td>- Declining</td>
<td>314</td>
</tr>
<tr>
<td>- Definition</td>
<td>544</td>
</tr>
<tr>
<td>- Editing</td>
<td>312</td>
</tr>
<tr>
<td>- Proposing new time</td>
<td>314–316</td>
</tr>
<tr>
<td>- Removing Propose New Time option</td>
<td>460</td>
</tr>
<tr>
<td>- Responding to</td>
<td>314–315</td>
</tr>
<tr>
<td>- Tentatively accepting</td>
<td>314</td>
</tr>
<tr>
<td>Meeting times, locating</td>
<td>337</td>
</tr>
<tr>
<td>Meeting windows</td>
<td>57, 544</td>
</tr>
<tr>
<td>Meetings</td>
<td></td>
</tr>
<tr>
<td>- Adding attendees</td>
<td>309</td>
</tr>
<tr>
<td>- Attendee availability</td>
<td>311</td>
</tr>
<tr>
<td>- Attendees</td>
<td>307</td>
</tr>
<tr>
<td>- Availability of attendees</td>
<td>307–308</td>
</tr>
<tr>
<td>- Cancelling</td>
<td>312–313</td>
</tr>
<tr>
<td>- Changing times</td>
<td>309</td>
</tr>
<tr>
<td>- Conference rooms</td>
<td>307</td>
</tr>
<tr>
<td>- Creating recurrences</td>
<td>305</td>
</tr>
<tr>
<td>- Default availability</td>
<td>301</td>
</tr>
<tr>
<td>- Indicating availability</td>
<td>304</td>
</tr>
<tr>
<td>- Inviting groups of people</td>
<td>307</td>
</tr>
<tr>
<td>- Inviting managed resources</td>
<td>307</td>
</tr>
<tr>
<td>- Meeting window</td>
<td>306–307</td>
</tr>
<tr>
<td>- Modifying</td>
<td>304</td>
</tr>
<tr>
<td>- Opening new meeting window</td>
<td>309</td>
</tr>
<tr>
<td>- Optional attendees</td>
<td>311</td>
</tr>
<tr>
<td>- Recurring</td>
<td>301–302</td>
</tr>
<tr>
<td>- Reminders, changing default</td>
<td>304</td>
</tr>
<tr>
<td>- Removing attendees</td>
<td>312</td>
</tr>
<tr>
<td>- Requirements</td>
<td>307</td>
</tr>
<tr>
<td>- Room Finder</td>
<td>307</td>
</tr>
<tr>
<td>- Scheduling</td>
<td>306–313</td>
</tr>
<tr>
<td>- Scheduling Assistant</td>
<td>306, 308</td>
</tr>
<tr>
<td>Skype for Business</td>
<td>292</td>
</tr>
<tr>
<td>Suggested Times list</td>
<td>307, 309</td>
</tr>
<tr>
<td>Time zones</td>
<td>300–301, 303</td>
</tr>
<tr>
<td>Tracking attendee responses</td>
<td>309</td>
</tr>
<tr>
<td>Message folders, creating</td>
<td>208–209</td>
</tr>
<tr>
<td>Message formatting</td>
<td>120</td>
</tr>
<tr>
<td>Message groups, expanding</td>
<td>198</td>
</tr>
<tr>
<td>Message headers</td>
<td>96, 544</td>
</tr>
<tr>
<td>Message list views</td>
<td>41–42</td>
</tr>
<tr>
<td>Message lists</td>
<td>187</td>
</tr>
<tr>
<td>- Changing default settings</td>
<td>192</td>
</tr>
<tr>
<td>- Changing sort order</td>
<td>195–197</td>
</tr>
<tr>
<td>- Default order</td>
<td>187</td>
</tr>
<tr>
<td>- Definition</td>
<td>545</td>
</tr>
<tr>
<td>Message participants</td>
<td></td>
</tr>
<tr>
<td>- Communication history</td>
<td>106</td>
</tr>
<tr>
<td>- Contact cards</td>
<td>103–106</td>
</tr>
<tr>
<td>- Presence information</td>
<td>103</td>
</tr>
<tr>
<td>Message responses</td>
<td></td>
</tr>
<tr>
<td>- Etiquette</td>
<td>109</td>
</tr>
<tr>
<td>- Formatting</td>
<td>120</td>
</tr>
<tr>
<td>- Forwarding</td>
<td>109</td>
</tr>
<tr>
<td>- Meeting requests</td>
<td>110</td>
</tr>
<tr>
<td>- Modifying recipients</td>
<td>109</td>
</tr>
<tr>
<td>- Task assignments</td>
<td>110</td>
</tr>
<tr>
<td>- Voting</td>
<td>110</td>
</tr>
<tr>
<td>Message rules</td>
<td>See rules</td>
</tr>
<tr>
<td>Message threads</td>
<td>47, 548</td>
</tr>
<tr>
<td>Message windows</td>
<td>47–52, 545</td>
</tr>
<tr>
<td>Messages</td>
<td></td>
</tr>
<tr>
<td>- See also categories; conversations; email</td>
<td></td>
</tr>
<tr>
<td>- Adding to To-Do List</td>
<td>380</td>
</tr>
<tr>
<td>- Address boxes</td>
<td>108</td>
</tr>
<tr>
<td>- Address resolution</td>
<td>74–75</td>
</tr>
<tr>
<td>- Arranging by attributes</td>
<td>194–198</td>
</tr>
<tr>
<td>- Arrival options</td>
<td>448</td>
</tr>
<tr>
<td>- Assigning categories</td>
<td>204</td>
</tr>
</tbody>
</table>
attaching files 88–94
attaching online file copies 93
attaching Outlook items 88–89, 94
attributes 194–195
Auto-Complete List 78–79
Backstage view commands 54
blocking 154–155, 157–158, 164
blocking external content 171–172
body field 73
categorizing 141, 198–201, 497
changing color schemes 128
changing default formatting 447
changing effect styles 128
changing font sets 128
changing status by using Quick Steps 497
closing after responding 114–115
collapsing groups 196, 198
Compose Message options 444–445
composing 48–51
configuring options 443
configuring safe senders 166
creating 73–78
creating appointments from 298–299
creating charts within 138–139
creating folders 208–209
creating from address books 237
creating tasks from 379–381
decrypting 181
delaying delivery 145
delivery options 139–142
digitally signing 180–182
displaying as conversations 189
displaying content 96–97
displaying Internet headers 156
displaying social network photos 462
drafting responses 53
drafts 82–83, 452–453
ingoing options 446
embedding photographs 137
encrypting 183
entering content 76
entering email addresses 76
entering recipients 74
entering subjects 76
expiring 145
external content, downloading 97, 172–173
faxing 92
fields 73–74
filing by using Quick Steps 497
flagging 141, 146, 380, 497
formats 72
formatting 50, 72–75, 120, 446, 456
forwarding 114, 449, 451
grouping/ungrouping 197
headers 74, 83, 96
HTML 72, 122
icons in headers 96
images 137–139
indicating importance 143
inserting screen captures 137
international financial scams 154–155
keyboard shortcuts 526–527
looking up contacts 236–237
managing external content 173–174
modifying drafts 86–87
moving to folders 208–209
moving to Junk Email folder 164
multiple categories 199
opening 96
organizing in folders 206–209
personalizing 72
messages (continued)
  phishing 154–155
  plain text 122, 125
  previewing 211
  printing 210–211
  priority 141, 143
  processing by using Quick Steps 496
  proofing options 444–445
  reading 51–52
  recalling 112–113
  receiving in plain text format 175
  redirecting replies 145
  reminders 141
  removing attachments 93
  removing contact group members 275
  replying to 108–110, 449
  replying with meeting requests 108
  requesting delivery receipts 144
  resending 112–113
  resetting arrangements 198
  responding to 108–111, 497
  restricting permissions 142, 184
  saving 451–452
  security 97, 141, 176
  selecting 197
  selecting recipients from address books 235–237
  sending 74, 84, 87, 270, 453
  sensitivity settings 141, 143
  settings 139–142
  signatures 72, 131–137
  SmartArt graphics 138–139
  sorting by column 197
  spam 154
  stationery 123–124
  style sets 131
  styles 129–131
  themes 123–125, 127–128
  tracing origins 156
  tracking 141, 455–456
  troubleshooting 78–79
  trusting senders/recipients 164
  verifying sent items 88
  viewing blocked content 172
  views 41–43
  voting buttons 141, 143–144
Microsoft accounts
  managing connections 26
  options 24
Microsoft Office Clipboard 133, 541
Microsoft Press contact information xvi
Microsoft Press Store xv
Mini Toolbar, enabling/disabling 441
module peeks See peeks
modules
  adding columns to list views 43–45
  displaying 35
  displaying Folders list 39
  displaying Reading views 46
  modifying view settings 243
  removing columns from list views 46
  reordering columns 46
  ribbons 10
  switching among 34
  types 8
Month view
  calendar arrangement 317
  keyboard shortcuts 530
  monthly calendar, printing 360
Mouse mode 17
Move To (Quick Step) 496, 498
multiple calendars
  displaying side by side 342–344, 346
  managing 336–346, 342–346
  overlaying 342–345
N
names, removing from Auto-Complete List 80
national holidays 296–297
navigation, keyboard shortcuts 522–523
Navigation Bar
   configuring 411–412
   customizing 467
   definition 545
new mail notifications 95
Nonediting Author role 348
nonworking time, setting 330
Normal view 42
Not Started status 371, 385
notes
   entering for contacts 229
   storing information in 202–203
   views 203
Notes module
   displaying 35
   opening 203
   views 203
notifications 95
numbers, legible fonts 121
O
Office 6–7
   changing backgrounds for all apps 26
   changing color schemes for all apps 26
   configuring options 440–442
   connecting to other services 25
   displaying account settings 26
   settings 22–23
   themes 25
Office 365 subscriptions
   licensing package 6–7
   managing 28
Office 365 Groups 461
Office 2016 keyboard shortcuts 535–540
Office Account page (Backstage view) 23
Office themes 25, 127
Office updates 28
offline address books, definition 545
OneDrive, connecting to 25
OneNote, linking notes to contact records 234–235
online calendars 337
opening co-workers’ calendars 337
organizing
   Inbox 206–209
   items in folders 207
   messages in folders 206–209
Other Calendars list 341
Out of Office Assistant See automatic replies
out of office messages See automatic replies
Outbox folder 37
outgoing messages
   evaluating conditions 492
   processing by using rules 488
Outlook
   configuring advanced options 467–471
   configuring options 440–442
   connecting to accounts 508
   keyboard shortcuts 521–535
   personalizing 408–415
   profiles 507
   settings 22–23, 28
   starting 4–5
   starting without connecting to accounts 509
   supported email accounts 505–506
   troubleshooting account connections 510–511
Outlook app window 32–35
Outlook Data Files 267–268, 507
Outlook home page

Outlook home page 396
Outlook items, keyboard shortcuts for creating 521–522
Outlook items, keyboard shortcuts for formatting 525–526
Outlook items, keyboard shortcuts for locating 524–525
Outlook items, keyboard shortcuts for managing 524–525
Outlook modules
displaying 35
opening multiple 35
switching among 34–35
Outlook Online 7
Outlook Today 396, 545
Outside My Organization
automatic replies 482
recipient options 483
overlaying calendars 344
Owner role 347–348

P
palettes, definition 545
panes, keyboard shortcuts 539
paragraph styles 129
peeks
displaying 412–413
pinning to To-Do-Bar 413–414
removing from To-Do-Bar 414
reordering 414
People cards, editing 230
People module
See also address books; contact records
contact record windows 61
definition 545
displaying 35
displaying address books 238
displaying different contact views 242
keyboard shortcuts 530–532
ribbon tabs 60
views 238–245
People Pane 105
expanding 106–107
switching views 107
People peek 412
definition 545
displaying pictures 461
percentage complete, of tasks 371
permissions
assigning for calendar 347
definition 545
messages 142
setting for shared calendars 351–353
personalizing messages 72
phishing messages 154–155, 545
phishing sites, definition 545
phone numbers, saving in contact records 228–229
pictures
adding to electronic business cards 281
embedding in messages 137
pinning
contact cards 104
peeks 413–414
placeholders for rule values 489
plain text messages 72, 545
pointing to, definition 545
Policy Tips 455
POP (Post Office Protocol) 506, 516, 546
practice files xiv–xv
practice tasks, files for use with xiv–xv
presence icons
colors 103
definition 546
presence information 103
Preview view (Calendar module) 316
previewing
  attachments 100–101
  messages 211
  style sets 131
  styles 130
previewing calendars 361
print preview, moving among pages 251
print styles
  calendars 360
  definition 546
printing
  calendars 359–364
  contact records 245–251
  messages 210–211
  previewing 361
priority
  of messages 195
  of tasks 372, 375
privacy of tasks 372
private items
  sharing with delegates 354
  tasks 372
procedures, adapting 18–19
profiles 507
Properties dialog box, opening 143
PST files 267–268
Publishing Author role 348
publishing calendars online 358
Publishing Editor role 348

Q
Quick Access Toolbar 9
  adding commands 417–419
  customizing 416–417
  definition 546
  displaying separator 419
  moving 420
  moving buttons on 419
  resetting to default 420
  toggling Touch/Mouse modes 17
Quick Click category 200
  assigning 204
  changing 206
  removing 204
  setting 206
Quick Steps 496–501
  actions 497
  built-in 496
  built-in, configuring 498
  creating 500
  custom 500
  definition 546
  editing 499
  keyboard shortcuts 500
  multiple email accounts 497
  reordering 501
  running 498
  tooltips 500

R
Reading Pane
  configuring 414–415
  customizing 467
  displaying 382
  displaying attachments 98
  displaying/hiding 96, 415
  magnifying 97
  meeting requests 314
  resizing 415
  scrolling messages 98
  settings 447–448
  viewing categories 200
Reading view 42–43, 46
read permissions 347, 353
reassigning tasks 392
recalling messages, definition 546
reciprocal sharing

reciprocal sharing
requesting 349
responding 351
recurrence of tasks 372
recurring items
  appointments 301–302, 305
definition 546
tasks 376–378
redoing actions, keyboard shortcuts 537
redundant messages, definition 546
regional holidays 296–297
religious holidays 296–297
reminders 301
definition 546
displaying visual indicators 460
modifying default display 460
for tasks 372, 378
Reply & Delete (Quick Step) 496
Reply All message response 108
Reply All With IM message response 110
Reply message response 108
Reply With IM message response 110
Reply With Meeting message response 108
resending, definition 546
resetting views 399
resolving
  addresses 74–75
definition 546
responding
  by using Quick Steps 497
to messages 108–111
to task assignments 391
Reviewer role 347–348, 354
ribbon 10
See also ribbon groups; tabs
buttons with arrows 12
Calendar module tabs 56–57
contact record tabs 62
controlling display 9
customizing 420–422
definition 546
displaying commands 417
displaying groups 16
displaying/hiding tabs 422
displaying tabs only 21
finding online resources 15
Folder commands 40
hiding 17, 21
keyboard shortcuts 537–538
Mail module tabs 39–41
optimizing for touch interaction 22
People module tabs 60
permanently redisplaying 22
resetting to default 425
Send/Receive commands 41
tabs 10
Tasks module tabs 64
temporarily redisplaying 22
tool tabs 11
unhiding 21
View commands 41
width 16–17
working in Touch mode 17, 22
ribbon groups
See also ribbon
adding commands 424
creating custom 423
definition 543
displaying hidden commands 16
renaming custom 424
Rich Text Format (RTF) 72, 546
roles
  assigning 347, 353
  permissions 348
  when delegating control of modules 354
Room Finder pane 307
RSS Feeds folder 37
RTF (Rich Text Format) 72, 546
rule actions
   adding to rules 492
   performed by rules 489–490
rule conditions
   adding to rules 492
   evaluated by rules 489–490
rule templates 489, 491
rules
   actions 489–490, 492
   applying to multiple email accounts 493, 495
   automatic reply rules 487
   conditions 489–490, 492
   creating 488–495
   definition 546
   deleting 495
   exceptions 490, 492
   from blank rules 494
   from templates 491
   modifying 495
   placeholders 489
   running on existing items 493, 495
   turning off 495
   turning on 493, 495
Rules Wizard 491–493, 492

S
saving
   attachments to storage drives 101–102
   message drafts 85
Schedule view calendar arrangement 317
schedules, sharing 346–358
scheduling
   appointments 292–295
   events 293, 298
   meetings 306–313
Scheduling Assistant 58, 306, 308, 337, 459
school calendars 337
scientific calendars 337
screen clippings, definition 546
screen resolution 16–17, 20
ScreenTips
   See also tooltips
calendars 293
   controlling display of 442
definition 547
displaying 12
displaying task details 383
search
   See also searching
   configuring options 463–464
   indexing options 464–465
Search folders 37
searching
   See also search
   address books 81–82
   address lists 82
   using categories 198
   contact records 277–278
   folders 206
   for holidays 297
   keyboard shortcuts 394
Secure Multipurpose Internet Mail Extensions (S/MIME), definition 547
security
   add-ins 471
   blocking external content 170–171
digital IDs 178–182
digital signatures 141
displaying email options 174–175
encrypting messages 141
junk email protection levels 168–169
outgoing messages 176
receiving plain text messages 175
security (continued)
  restricting permissions 184
  scanning for viruses 100
  Trust Center 474–476
sending/receiving 40
  keyboard shortcuts 534
Sent Items folder 37
separated text files, definition 547
server certificates, troubleshooting 510
server rules, definition 547
shared calendars
  adding to Calendar module 351
  closing 339
  displaying 336
  setting permissions 351
Shared Calendars list 339
shared workspaces 461
SharePoint calendars
  connecting to 341
  displaying 336
sharing calendar information
  externally 356–358
  restricting details 347
sharing calendars
  with co-workers 348
  by email 356
  by publishing online 358
  requesting 349
  restricting details 347
sharing invitations 349
sharing requests 350
shortcut keys See keyboard shortcuts
shortcut menus, definition 547
side-by-side calendars 337
Side-By-Side mode 342
signatures 72, 131–132
  adding inline images 135–136
  applying to multiple accounts 133
creating 133–134
editing 135
formatting 132–133
manually inserting 137
removing from messages 137
Signatures And Stationery dialog box, opening 124–125
sizing handles, definition 547
Skype for Business 292
SmartArt graphics
  adding to messages 138–139
  definition 547
  modifying 139
S/MIME (Secure Multipurpose Internet Mail Extensions), definition 547
social media services 25
  changing connections 27
  connecting to 26
  removing connections 27
spam 154, 547
sports calendars 337
start dates for tasks 371
starting Outlook 4
static images 139
stationery 123–124, 126
status bar 14
  customizing 22
  definition 547
  managing automatic replies from 484
status of tasks 371
status options for tasks 371
status reports for tasks 393
sticky notes 202
style sets
  changing 131
  displaying names of 131
previewsing effects 131
styles 129
applying 131
previewsing 130
Styles gallery 129–130
Styles pane 129
moving 131
opening 130
Subject field 73, 76
subscribing to Internet calendars 338, 342
Suggested Times list 309
support resources xvi

tables, keyboard shortcuts 538–539
tabs
See also ribbon
creating custom 423
creating custom groups 423
definition 547
displaying on ribbon 21, 422
removing commands 422
renaming custom 423
on ribbon 10
task assignments
accepting 391–392
creating 387–390
decreasing 391–392
managing 387–393
reassigning 391, 392
reclaiming 391
responding to 391–392
sending status reports 393

task details, previewing in Tasks peek 383
task entry box labels 370
task folders, creating 381
task items See tasks
task lists
definition 547
displaying on calendars 322
removing tasks 385
task originators, definition 547
task owners, definition 547
task reminders 378
task requests See task assignments
task status 371, 385
task windows 64–65
definition 547
marking tasks as complete 387
opening 383
tasks
assigning 387–390
assignments 110
categories 372
changing default due date 380
completed 394
creating 370–381
creating from Outlook items 379–381
creating from Tasks peek 373
creating recurring 376–378
custom flags 377–378
deleting 386–387
displaying Daily Task List 400–401
displaying in Reading Pane 382
displaying in Tasks module 393–399
due dates 371
filing in folders 381
filtering 394–395
flagging for follow-up 377
grouping 398
inserting images 138
keyboard shortcuts 533–534
managing 381–387
managing assignments 387–393
Tasks folder

tasks (*continued*)
marking as complete 385–386
opening 383
options 463
priority 372
privacy 372
recurrence 372
reminders 372, 469
removing from task lists 385
renaming 385
scheduling 400
searching 394
sorting 398
start dates 371
To-Do List view 63
updating 382–385
updating status 385
views 393–401
Tasks folder 393
Tasks module
creating tasks 374–375
definition 547
deleting tasks 387
displaying 35
displaying flagged items 394
displaying tasks 393–399, 394
keyboard shortcuts 533–534
marking tasks as complete 386
ribbon tabs 64
views 63, 393–401
Tasks peek 412
adding Outlook items 380
creating tasks 373
definition 547
marking tasks as complete 386
opening flagged messages 384
previewing task details 383
Tasks view, definition 547
Team Email (Quick Step) 496
Tell Me What You Want To Do 15
text
changing appearance 120
changing on electronic business cards 282
formatting on electronic business cards 284
keyboard shortcuts for moving around in 538
Theme Or Stationery dialog box, opening 125
themes
default 127
individual messages 127–128
messages 123–124, 125–126
setting defaults 120
types 25
Themes gallery 127
third-party add-ins, definition 547
threads, definition 548
thumbnails 13, 548
time range for automatic replies 485
time slots on calendars 293, 295
time zones
See also calendars
appointments 303
changing to match locations 332
configuring 332–335
displaying multiple 334
hiding controls 303
meetings 303
options 458–459
specifying calendar settings 333–334
specifying for appointments 335
specifying in calendars 300
switching primary and secondary 335
Timeline view, keyboard shortcuts 533–534
title bars 9, 548
TLD (top-level domain) 168–169
To field 73–74, 76
To Manager (Quick Step) 496
To-Do Bar
definition 548
hiding 414
pinning peeks 413
removing peeks 414
resizing 414
To-Do List, adding messages 380
To-Do List folder 393
To-Do List view, definition 548
tool tabs 11, 548
tooltips 500 See also ScreenTips
top-level domain (TLD) 168–169
Touch mode 17
tracked changes, user identification 442
tracking messages 141, 455–456
traveling, changing time zones 335
tri-fold calendar, printing 360
troubleshooting
address lists 79
Auto-Complete List 78–79
encrypted connections 511
Exchange account connections 510–511
message addressing 78
multiple recipients errors 79
server certificate errors 510
Trust Center
configuring 474–476
opening 476
Twitter
address for Microsoft Press xvi
connecting Outlook to 25
Type A New Task 370, 373–374
U
undoing actions, keyboard shortcuts 537
Uniform Resource Locator (URL), definition 548
unique messages 188, 548
updating Internet calendars 338
user interface 5
app window elements 8–14
customizing fonts 425–431
V
values for rule placeholders 489
View Shortcuts toolbar 14, 548
View commands 41
View In Overlay mode 342
views
Calendar module 316–323
definition 548
Mail module 41–43
Notes module 203
People module 238–245
resetting to defaults 399, 430
Tasks module 393–401
virtual folders 393
viruses, scanning attachments 100
Visual Basic Editor, opening 535
voting buttons 141
adding 143–144
responding 110
W
Waiting On Someone Else status 371, 385
Weather Bar 460
web beacons 160, 548
websites
calendar-sharing 338
Internet calendars 337
saving in contact records 228
Week view

Week view
- calendar arrangement 317
- keyboard shortcuts 529
weekly agenda, printing 360
weekly calendar, printing 360
windows
  See also app windows
  keyboard shortcuts 535
  maximizing 20
work calendars, opening other people’s 337
work times, setting 330
work week
  See also calendars
  definition 548
  displaying on calendar 331
  modifying settings 331–332
Work Week calendar arrangement 317, 322
working time, setting 330
write permissions 347, 353

Y
- YouTube, connecting to 25

Z
- Zoom 14
- Zoom Slider tool 14
About the author

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Acknowledgments

I appreciate the time and efforts of Carol Dillingham, Rosemary Caperton, and the team at Microsoft Press—past and present—who made this and so many other books possible.

I would like to thank the editorial and production team members at Online Training Solutions, Inc. (OTSI) and other contributors for their efforts. Jaime Odell, Jean Trenary, Jeanne Craver, Kathy Krause, Susie Carr, and Val Serdy all contributed to the creation of this book.

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