Microsoft® Outlook® 2016 Part 1- Lesson 4

E-COURSE NOTES

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Tel: (+267) 311 48 58 • (+267) 72 309 719 • **Email:** training@kti.co.bw • **Website:** www.kti.co.bw

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About This Course

Course Prerequisites

This manual assumes the user understands the basics of using a Windows-based computer. Students should be comfortable using the keyboard, mouse, and Start menu. Understanding and experience with printing and using a web browser is an asset, but not required. No previous experience with other versions of Outlook is necessary.

Course Overview

Welcome to the first part of our courseware for Microsoft Office Outlook 2016, Microsoft's powerful and easy-to-use personal information management program. This new version of Outlook incorporates some new features that will help make managing your e-mail and personal information easier than ever.

This course is intended to help all novice computer users get up to speed with Outlook quickly. This manual will also help more experienced users who have little to no experience with Outlook and the ribbon interface.

Course Objectives

By the end of this course, users should be comfortable with using and customizing the Outlook 2016 interface, creating and sending messages, managing contacts, using the calendar, managing tasks, and working with notes.

How To Use This Book

This course is broken up into eight lessons. Each lesson focuses on several key topics, each of which are broken down into easy-to-follow concepts. At the end of each topic, you will be given an activity to complete. At the end of each lesson, we will summarize what has been covered and provide a few review questions for you to answer. Supplemental learning for selected topics is provided in the form of Lesson Labs at the end of this book.

Before you begin, download the course's Exercise Files to a convenient location. They will be referenced throughout this course and are a key part of your learning experience

LESSON 4:
MANAGING YOUR MESSAGES

Lesson Objectives

In this lesson you will learn how to:

- Manage messages using tags, flags, and other commands
- Organize messages using folders

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TOPIC A: Manage Messages Using Tags, Flags, and Other Commands

As you continue to use Outlook 2016 to manage e-mails, you may find that your inbox will quickly fill up. Without any way to differentiate important messages or identify messages that require follow-up, you can waste a lot of time. Over the course of this topic, you will learn about the various features in Outlook 2016 that you can use to manage messages.

Topic Objectives

In this topic, you will learn:

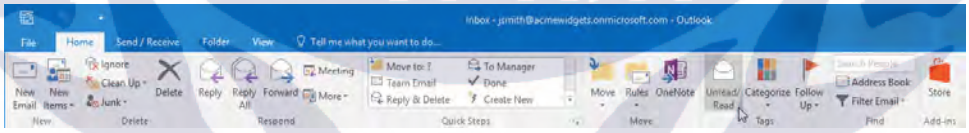
- How to mark messages as read and unread
- About color categories
- How to flag messages for follow-up and customize follow-up options
- About the Ignore Conversation command
- About the Clean Up commands

MARKING MESSAGES AS UNREAD/READ

Whenever a new message arrives in your Inbox, it will be unread until you open it in the Reading pane or in the Message window. You can quickly identify what messages are unread by the bold font and blue highlights:

While unread messages will automatically appear as read if you open them, you can mark a message as read or unread.

To do this click to select the message from the working area and then click Home → Unread/Read:

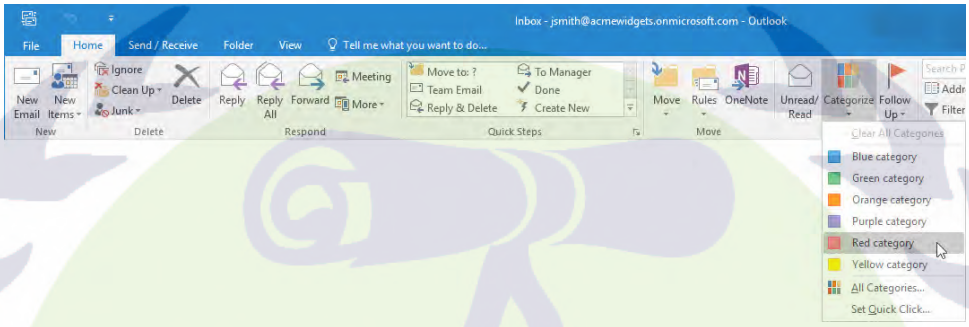


Tip: You can also use the Ctrl + U shortcut to mark an item as unread, or the Ctrl + Q shortcut to mark an item as read.

COLOR CATEGORIES

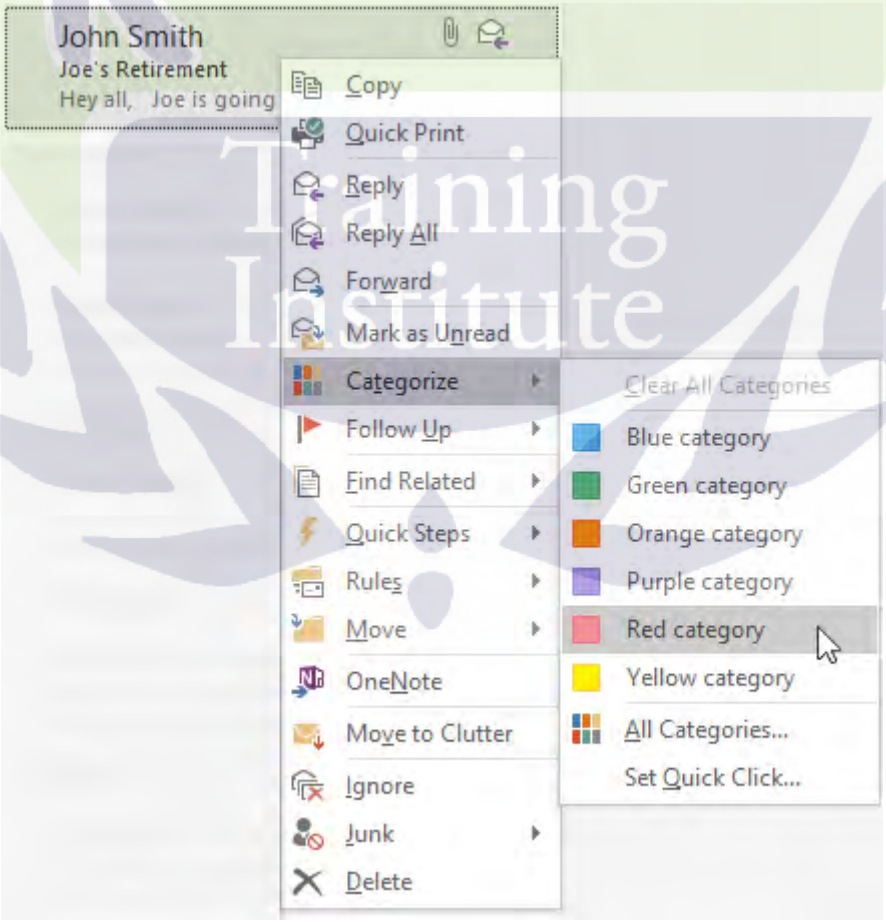
To further organize your messages, you can assign them colored categories. These are completely customizable in that you can give them any title that you like. For example, you could color categorize any messages from your manager using a red category that you have labeled “Manager.”

To assign an item to a category, first select the item(s) to categorize. Then, click Home → Categorize → [Category]:

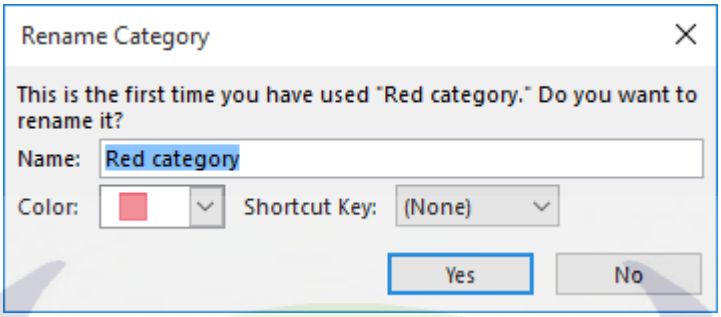


The Clear All Categories option in this menu will remove all categories from the item. To clear a single category, click Categorize and click the category to remove from the item.

Alternatively, you can right click on a message within the working area and click Categorize → [Category]:

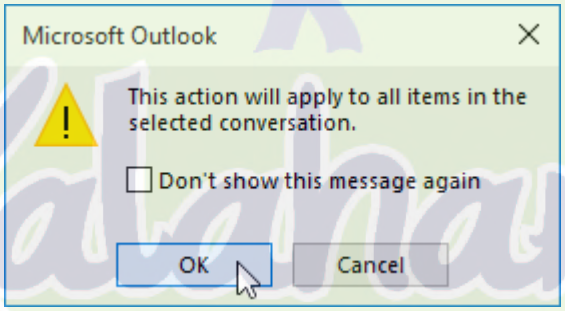


If it is the first time that you are using a category, the Rename Category dialog box will open and prompt you to rename it. Additionally, you are given the option to apply a shortcut key if you wish:



Color Categories and Conversations

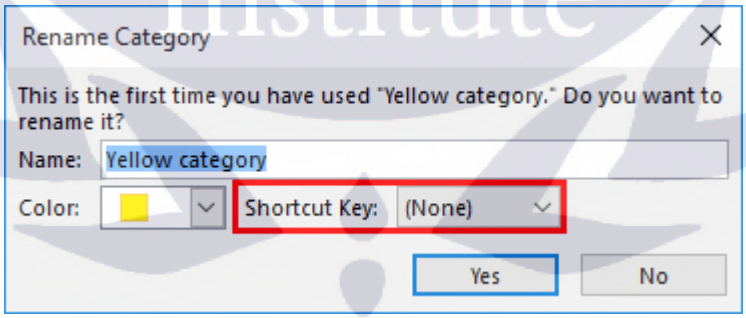
A color category that is applied to any top-level message will also be applied to other messages within the same conversation. Outlook will display a dialog box that indicates this fact when you apply a color category to a conversation item:



You are still able to apply colored categories to the individual items in a conversation by selecting those messages.

Shortcut Keys

When you use a color category for the first time, you will be given the opportunity to assign it a keyboard shortcut:

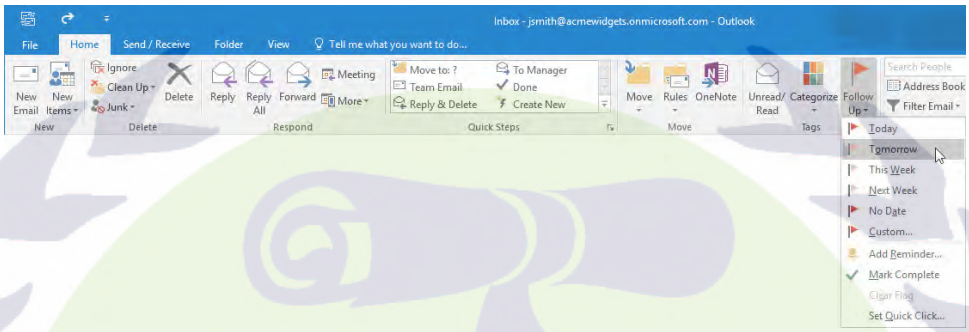


This shortcut key will allow you to apply an associated category to the selected Outlook item with just a few keystrokes.

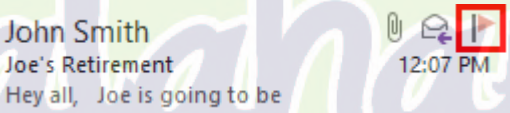
FLAGGING MESSAGES FOR FOLLOW-UP

Outlook also features a handy tool that adds follow-up flags to your messages. This feature allows you to quickly see which messages require follow-up. It will also remind you to follow up by the specified deadline (today, tomorrow, this week, next week, etc.).

To mark a message for follow-up, select it and then click Home → Follow Up → [Follow-Up Flag]:



Once you add a follow-up flag, it will be visible in that message. A reminder (if applicable) will also be shown and displayed within the To-Do Bar. You can mark an item as complete by clicking the flag icon:



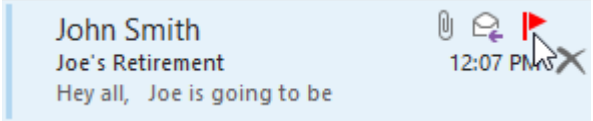
FOLLOW-UP FLAG OPTIONS

There are several different follow up options that you can choose from:

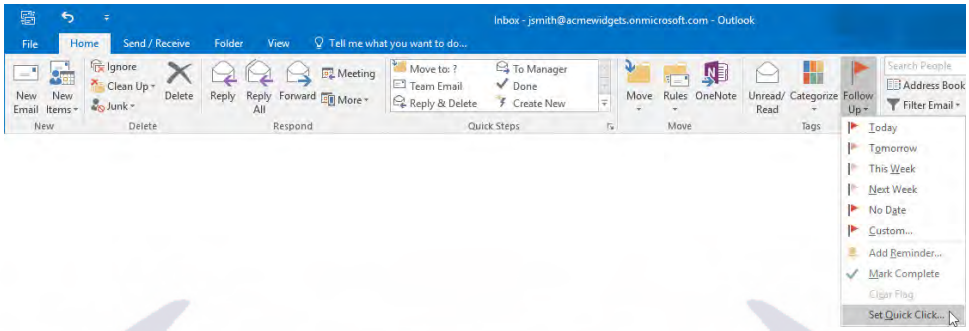
- **First Five Options**: Set the date for the follow-up.
- **Custom**: Opens a dialog to set the type of flag, start time, due date, and reminder. Also has an option to clear an existing flag.
- **Add Reminder**: Add a reminder to this flag.
- **Mark Complete**: Change the flag to a checkmark to indicate that the follow up is complete.
- **Clear Flag**: Clear the existing flag; useful if you have flagged a message by accident.
- **Set Quick Click**: Control what happens when you click the flag icon in a folder.

Set Quick Click for Flags

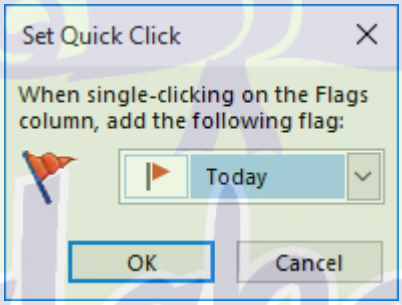
If you find yourself using the same flag type over and over again, you can assign it as a Quick Click for flags. Doing this allows you to apply this flag by clicking the flag icon that appears inside the listing for an Outlook item:



To assign the Quick Click flag type, click Home → Follow-Up → Set Quick Click:



This action will display the Set Quick Click dialog box. Using the drop-down menu, you can then choose the flag that you would like to assign as the Quick Click flag. Click OK to apply any new settings:



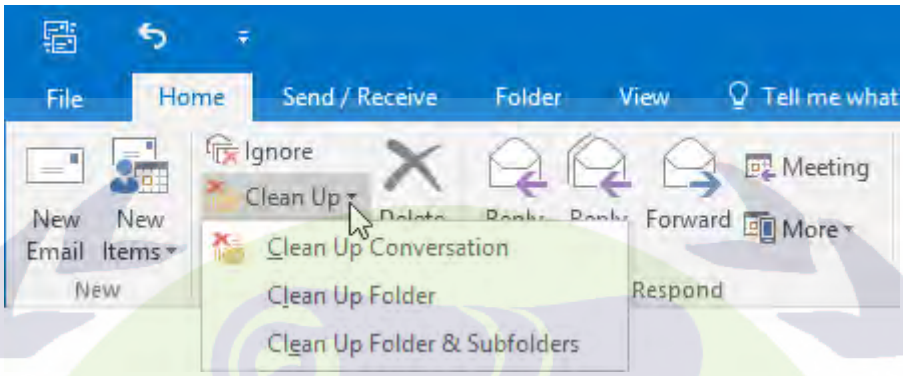
THE IGNORE CONVERSATION COMMAND

Occasionally, you may find yourself part of a long and ongoing conversation that you do not have much stake in. Such a situation can clutter your mailbox and distract you with notifications. By selecting that conversation and then clicking Home → Ignore, you will be able to ignore any new messages that are part of the conversation:

This means that the selected conversation and any new messages in it will automatically be moved to the Deleted Items folder. (You can recover these conversations by restoring them to your Inbox folder from the Deleted Items folder.)

CLEAN UP COMMANDS

Clicking Home → Clean Up will reveal several commands that you can use keep your inbox clear of clutter:



Here is an overview of the commands in this menu.

- The **Clean Up Conversation** command will evaluate the currently selected conversation and remove redundant messages. This could include, for example, removing conversation messages whose contents are contained within another message.
- The **Clean Up Folder** command is similar, but it is broader; it will evaluate and remove any redundant messages in any conversation that it finds in the currently selected folder.
- Finally, the **Clean Up Folder & Subfolders** command will evaluation and remove redundant messages from every conversation in the current folder and its subfolders.

ACTIVITY 4-1

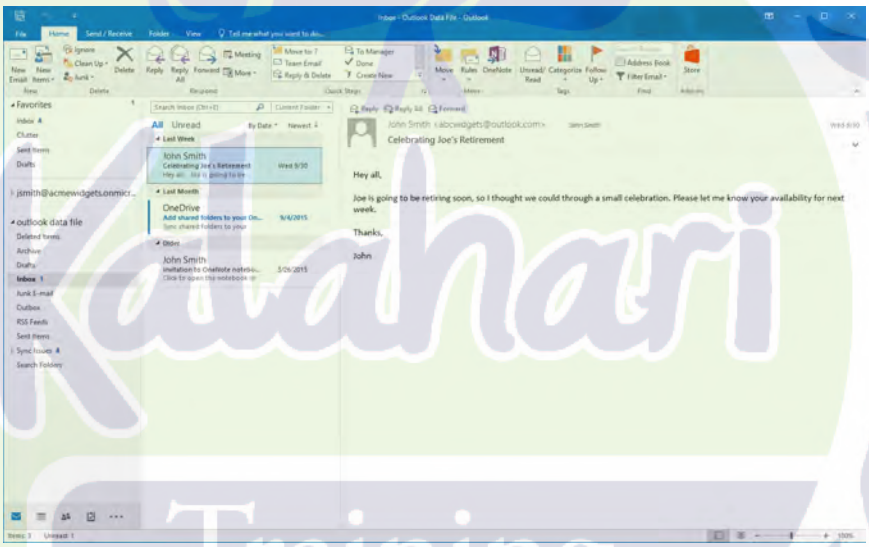
Managing Messages Using Tags, Flags and Other Commands

Now that your inbox is starting to fill up with messages, you would like to better organize it using some of the features that you learned about in this topic.

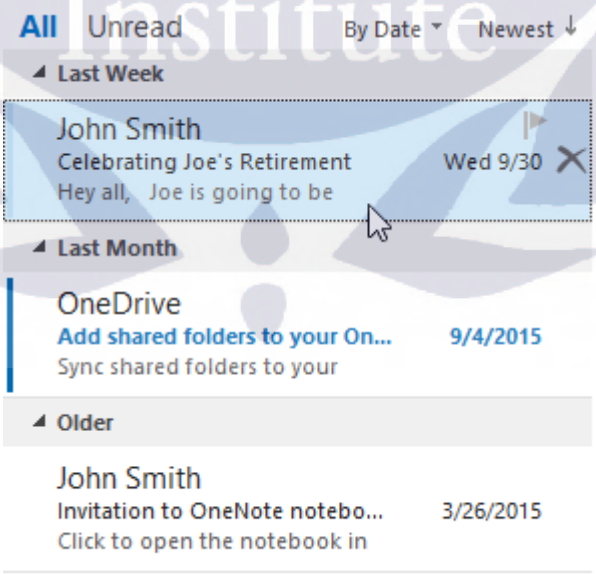
Before students begin, please have them follow these steps to open the Lesson 4.pst file in their Exercise Files.

- Click the File menu, click Open & Export, and click Open Outlook Data File.
- Browse to Lesson 4.pst in the Exercise Files folder. Click OK.

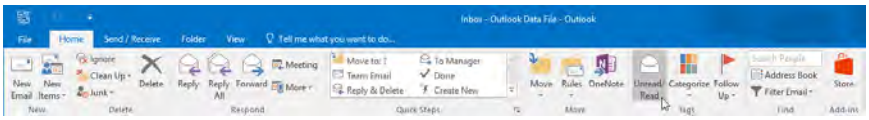
1. To begin, open Outlook 2016. Ensure that the Inbox for the Outlook Data File is displayed:



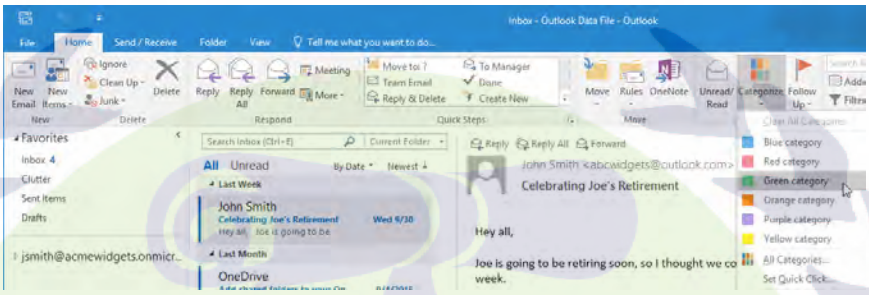
1. Click to select the most recent message inside the Inbox folder:



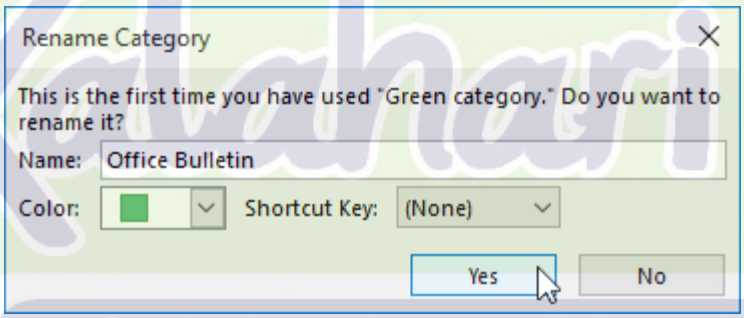
2. Click Home → Unread/Read:



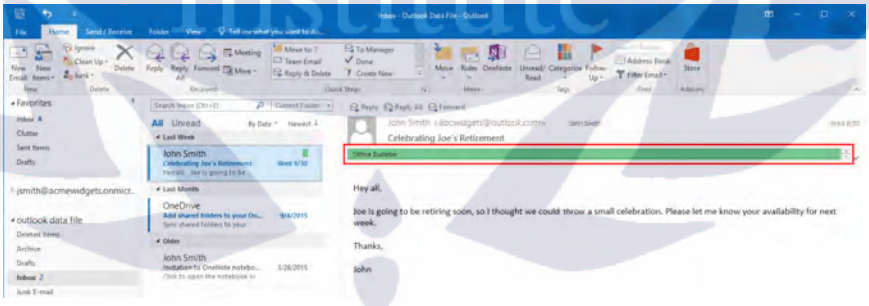
3. The selected message will now have been marked as unread. With the message still selected, click Home → Categorize→ Green Category:



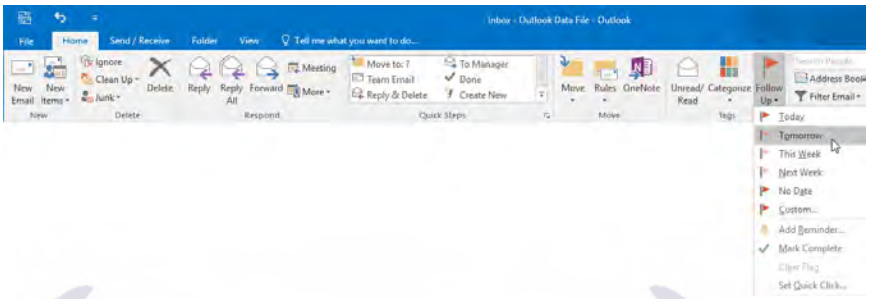
4. As this is your first time using the green category, the Rename Category dialog box will be displayed. Type “Office Bulletin” into the Name text box and then click the Yes button:



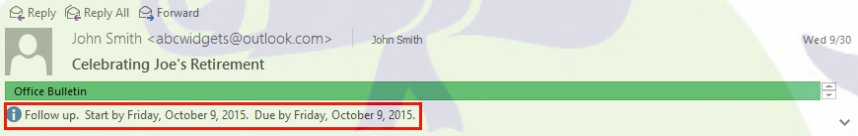
5. The green category will now have been applied to the currently selected message. You will see this category adjacent to the message’s listing in the Content pane, as well as near the top of the message itself:



6. With the message still selected, click Home → Follow-Up → Tomorrow:



7. With the selected message now marked for follow-up, you will see the small follow-up icon appear next to it in the message list. If you examine the top of the message, you will see when to follow-up on this message:



(A task for follow-up will also appear within the To-Do Bar.)

8. Close Microsoft Outlook 2016.

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TOPIC B: Organize Messages Using Folders

While categories and tags can help you keep track and organize messages within your mailbox, folders are a much better long-term solution. Over the course of this topic you will learn about folders in your mailbox and how to use them to organize Outlook items.

Topic Objectives

In this topic, you will learn:

- About the default e-mail folders
- About e-mail folders on the server
- About personal folders

DEFAULT E-MAIL FOLDERS

Every mailbox in Outlook 2016 contains several default folders that are used to organize and store messages:

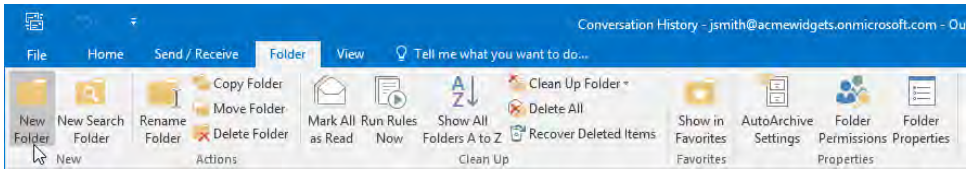
Let's take a look at each mail folder.

Inbox	This is where new mail is received.
Drafts	Unsent messages are saved here by default.
Sent Items	After a message is sent, a copy of it is stored here.
Deleted Items	This folder acts like the Recycle Bin in Windows. When you delete an Outlook item, it goes here first. To permanently remove the items in your Deleted Items folder, click Folder → Empty Folder while in the Deleted Items folder.
Clutter	Office 365 users have access to the Clutter folder. This is where low priority messages are automatically moved based on your previous reading behavior.
Conversation History	This folder will list conversation history for any contacts that you have interacted with using Microsoft Lync or Skype for Business.
Junk E-mail	E-mail marked as junk will be stored here.
Outbox	Messages you have created are stored here while Outlook connects to the server and sends the message.
RSS Feeds	Live feeds are stored here.
Search Folders	You can customize these folders to update based on search criteria.
Groups	Access shared workspaces. Only available with Office 365 accounts.

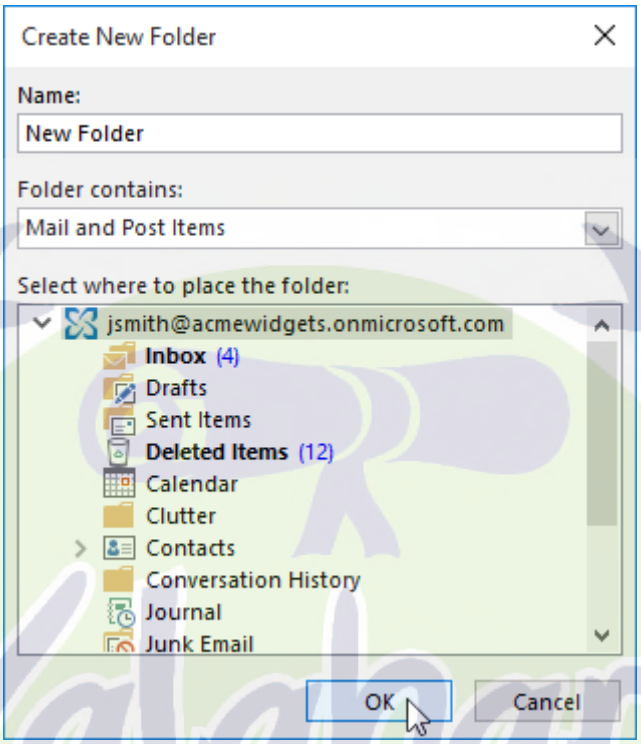
E-MAIL FOLDERS ON THE SERVER

While the default e-mail folders cover storage needs for most situations, you also have the flexibility to create your own folders. Just like the default folders, you can use custom folders to store and save e-mails in a meaningful way. For example, if you are working on a large project that generates a lot of e-mail, you could create a folder just for that project.
Depending on the type of e-mail service that you are using, any folders that you create may also be created on the server that you have connected to. In the case of Microsoft Exchange Server, you need to keep in mind that folders and their contents count against any allocated space for your mailbox. This amount of space is set by your system administrator.

To create a new e-mail folder within your mailbox, click Folder → New Folder:



This action will display the Create New Folder dialog box. Using the controls in this dialog box, enter a name, choose the type of Outlook items that the new folder will contain, and select the location where you want the new folder to be placed. Click OK to create the folder:



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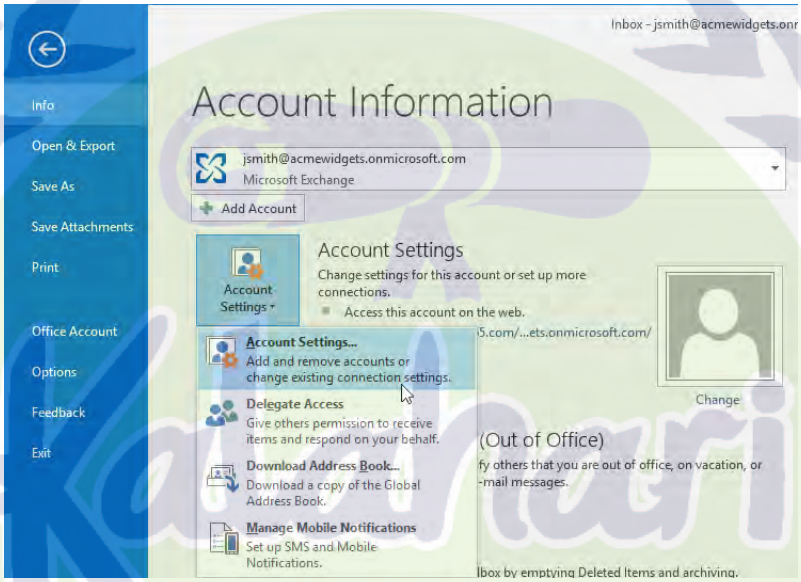
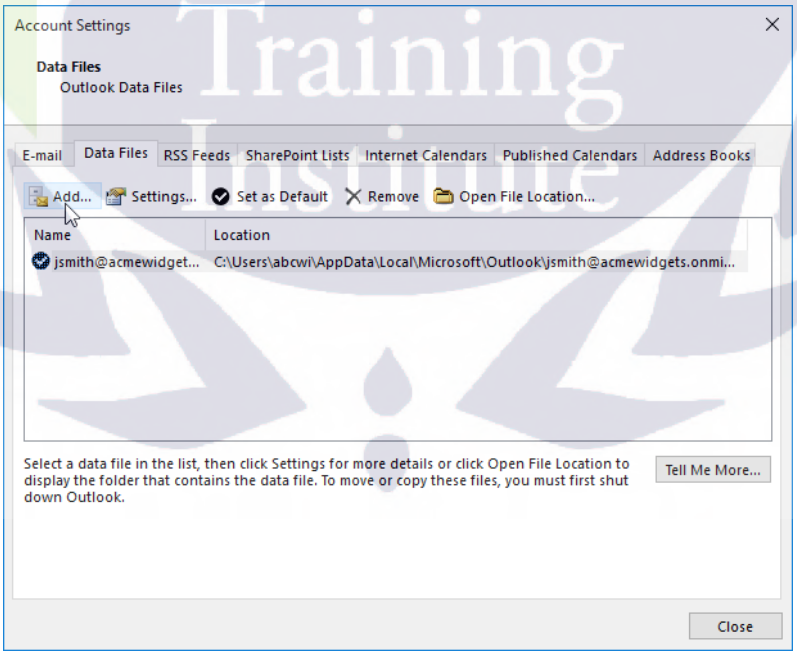
PERSONAL FOLDERS

Personal folders behave in the same manner as regular folder, but they are intended to store Outlook items offline. They do this by saving the folders and their contents on your local computer and not to the server that you are connected to.

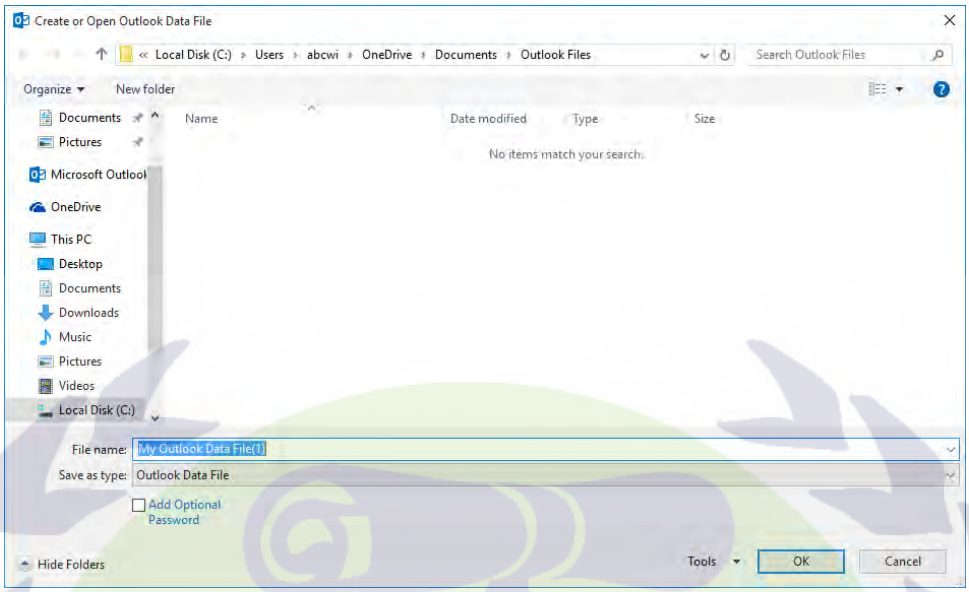
Personal folders are added as an Outlook Data File (.pst) and as such are managed in the Data Files tab of the Account Settings window. You can open this window by clicking File → Info → Account Settings → Account Settings:



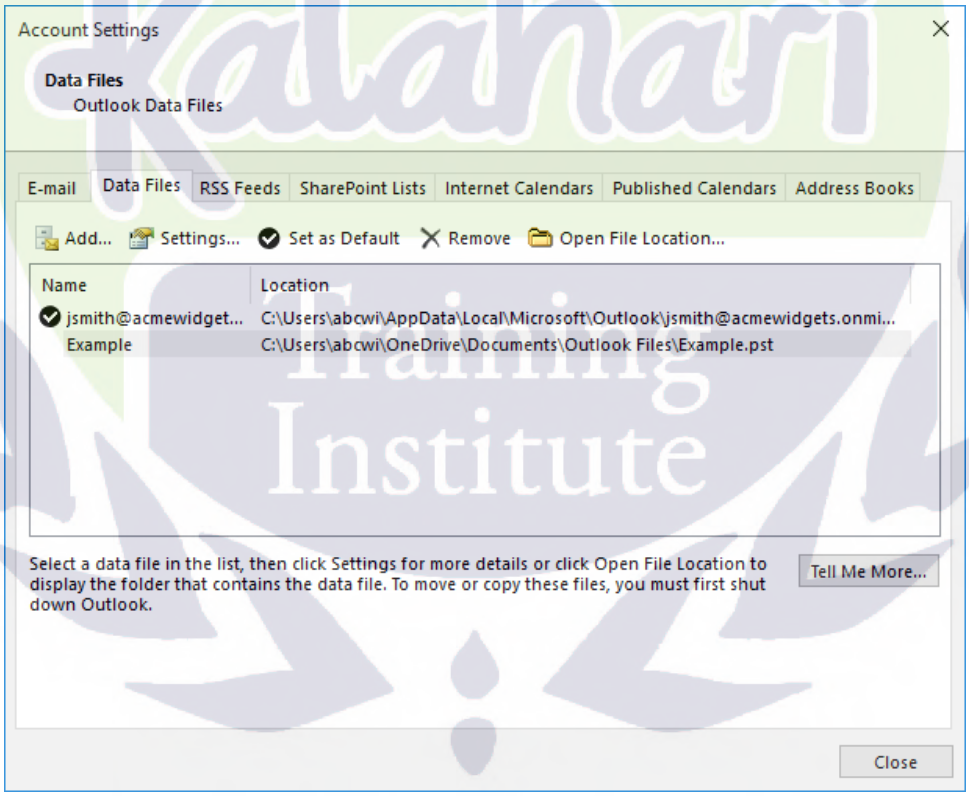
In the Account Settings window, click Add to get started:



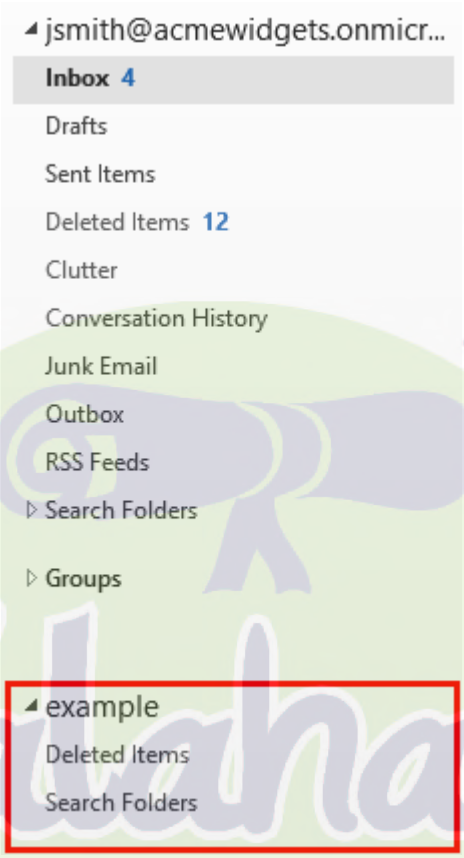
This will display the Create or Open Outlook Data File dialog box, open to the Outlook Files folder in the My Documents folder that is associated with your Windows user account. Using the controls in this dialog you can choose another location where you want the Outlook data file to be stored (if desired), as well as give it a custom name:



Once you click the OK button in the Create or Open Outlook Data File dialog box, you will be returned to the Account Settings dialog box. The new data file (which includes personal folders) will be listed under the Data Files tab:



Back in the Outlook 2016 window, you will see the new data file listed in the Navigation pane. Expanding this item will reveal any personal folders that it contains:



By default, new data files will include a Deleted Items folder and a Search Folders link, but you can add as many personal folders as you want by following the same steps as you would to add a regular folder to your mailbox.

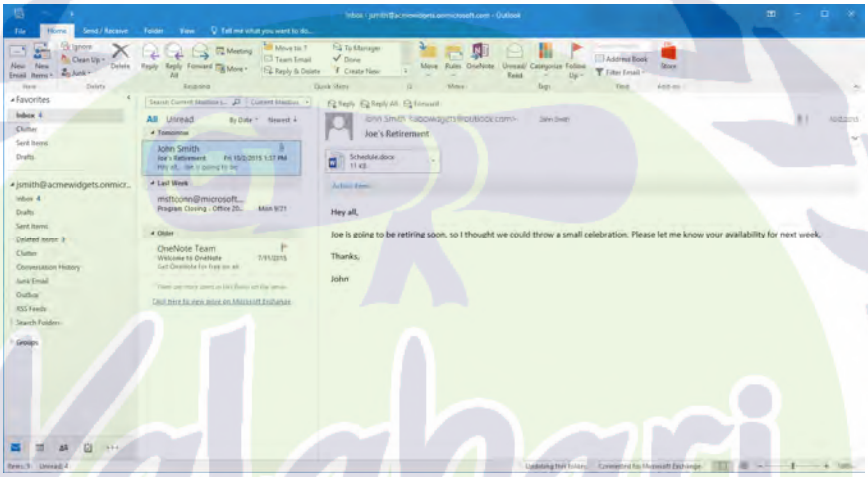
Tip: You can collapse the data file and hide its contents by clicking the black arrow next to its name.

ACTIVITY 4-2

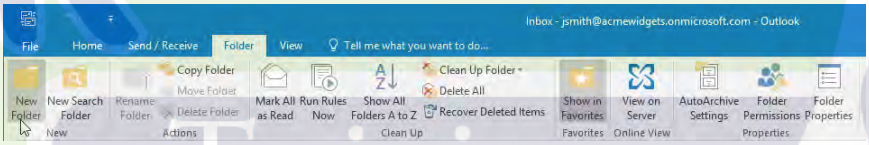
Organizing Messages Using Folders

You have been put in charge of hiring a new employee. Prospective candidates will e-mail you their resumes, so you want to create some folders in your mailbox to keep everything organized.

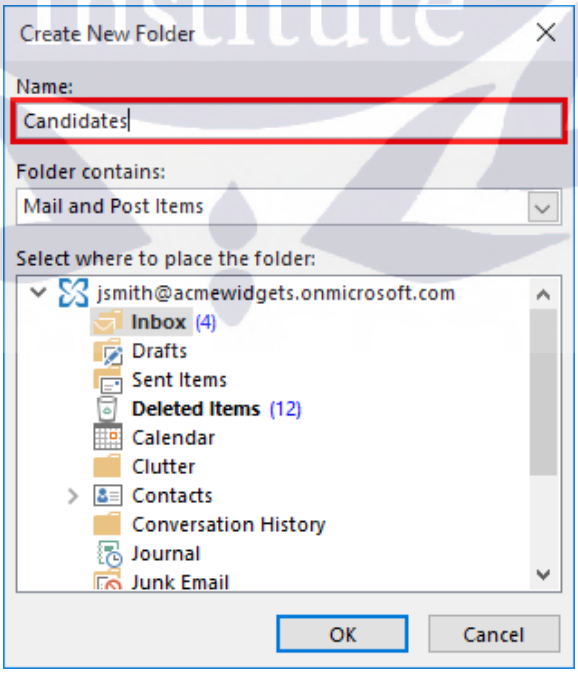
1. To begin, open Outlook 2016 to your Inbox:



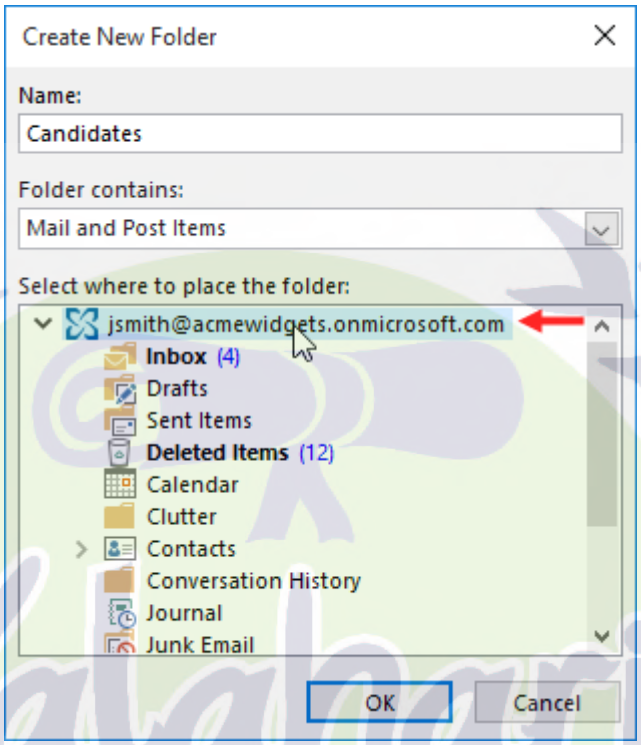
2. To create a new folder, click Folder → New Folder:



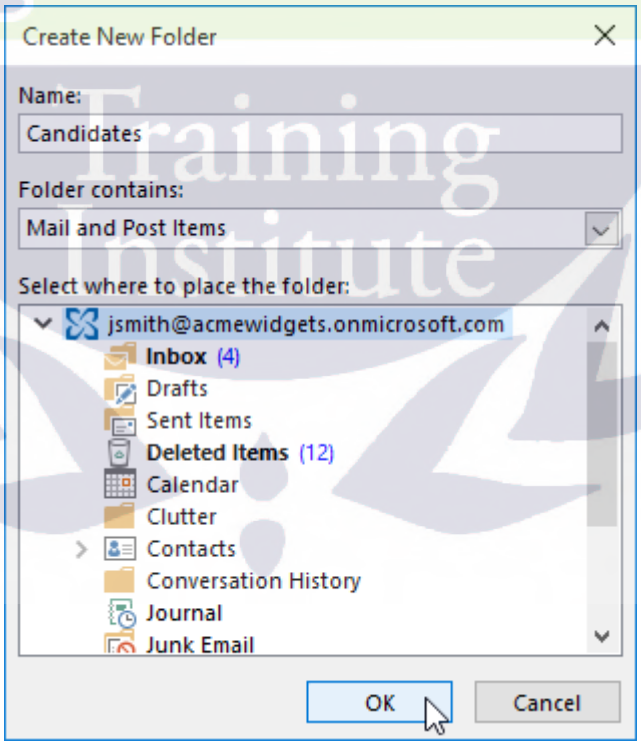
3. The Create New Folder dialog box will now be displayed. In the Name text box, type "Candidates:"



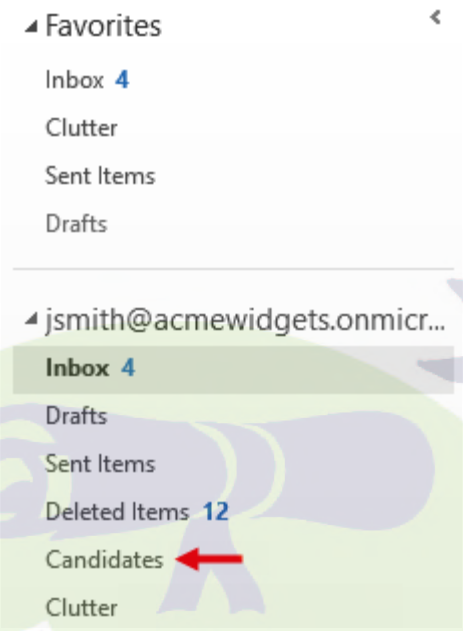
4. As this new folder is going to be used to store messages, you do not need to modify the "Folder contains" drop-down menu; however, you do need to choose where the folder will be placed. For this example, select the top-level item in the provided list:



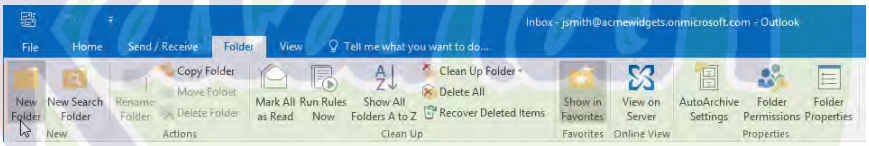
5. Click OK to create a new folder using the selected settings:



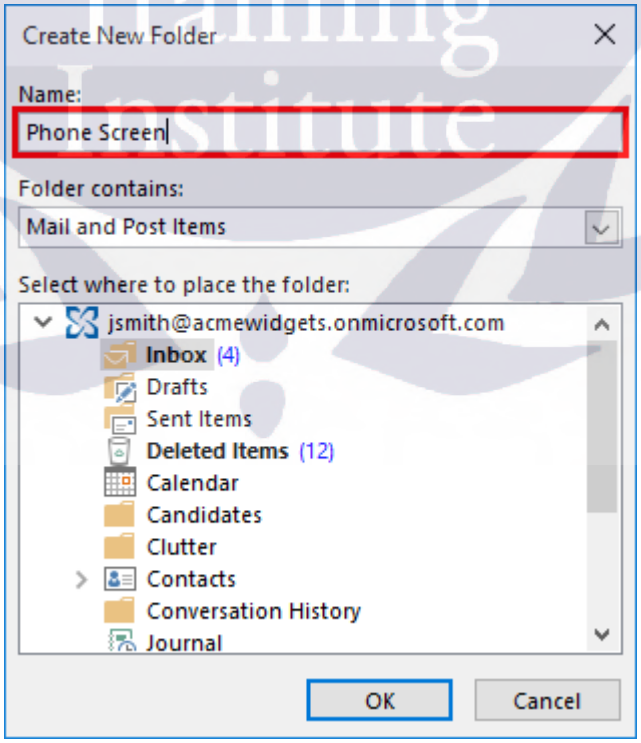
6. The new folder will now appear in the Navigation pane:



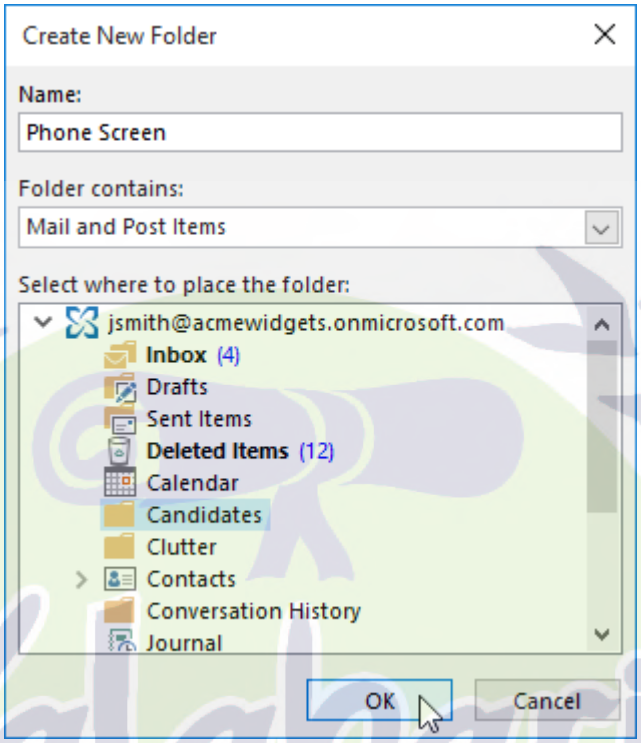
7. Now you need to create a subfolder within the Candidates folder for candidates that you would like to screen over the phone. Click Folder → New Folder:



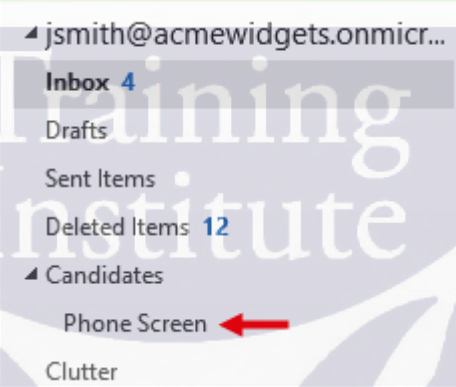
8. The Create New Folder dialog box will now be displayed. Type “Phone Screen” into the Name text box:



9. From the "Select where to place the folder" list box, click to select the Candidates folder that you created previously. Click OK:



10. The new subfolder will appear under the Candidates folder:



11. Close Microsoft Outlook 2016.

Summary

During this lesson, you learned about some of the different tools and features that are available to you to help you organize Outlook items within your mailbox. You should now feel comfortable managing your mailbox using a combination of categories and follow-up flags. Additionally, you should now be familiar with the folders that are included with your mailbox by default, as well as how to create new folders.

REVIEW QUESTIONS

1. **What is the command sequence to mark a message as unread?**
2. **What happens when you apply a color category for the first time?**
3. **What is the command sequence to set the follow-up quick click flag?**
4. **What happens when you choose to ignore a conversation?**
5. **What is the command sequence to create a new folder in your mailbox?**

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LESSON LABS

Lesson 4

LESSON LAB 4-1

Objective	To understand how to manage your messages.
Briefing	You have received a message, but you are very busy at the moment. You would like to flag it for follow-up later today.
Task	Exchange the Sample Data message with a partner. When you receive this message, mark it as read without opening it. Next, flag it for follow-up today. Create a new folder that is named “Personal” and is a subfolder of the Inbox folder.
Sample Data	Lesson Lab 4-1 Outlook Item 17.1 MB

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