This document was prepared by the Department of Computer Science and Engineering for faculty and staff at the University of South Carolina who are converting from GroupWise to Outlook.

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Outlook Training

Converting from GroupWise to Outlook

This and other information will be available online at: http://www.cse.sc.edu/~cmatthew/outlook/outlook.html and will be updated frequently with additions, etc.

This handout was developed to help GroupWise users convert to Outlook. Outlook is easy to use and with very little practice you will quickly become accustomed to it. Although there may be a few things that you miss, you will find that you can do everything you want in Outlook and that Outlook has some useful features that were not available in GroupWise. We will cover the basics here to get you started and mention differences with GroupWise throughout. After you are comfortable with the basic Outlook features you will want to branch out and try the other features that Outlook offers.

Email is like a post card. It is not private. When it is stored it is not encrypted and can be read by others. It should never contain sensitive information such as social security numbers, etc. Always use care in choosing the content of your email.

Outlook 2007 has a higher level of virus protection than the previous versions of Outlook but it is still important that you take the proper precautions. Always keep your antivirus program up-to-date. Use caution when choosing to open an attachment. Attachments can contain viruses and opening an infected attachment is the easiest way to get a virus through email. See the precautions below under Attachments and Viruses. Pay attention to email from USC’s University Technology Services (UTS) about specific virus information. Be certain that it is from UTS. Don’t fall for a virus hoax. Although you can greatly reduce the chances of your computer getting a virus, it is still possible. As soon as you suspect that your computer has a virus, disconnect it from the Internet by disconnecting the network cable or turning off your wireless connection.

Back-up copies of the email on the server are kept, but they are for disaster recovery only, not for retrieving accidentally deleted messages. Outlook gives you multiple chances for recovering deleted email. You can move a deleted message back out of the Deleted Items folder if it is still there. (See Deleting Messages.) If it is not in the Deleted Items folder you still have a good chance to recover it. (See Recovering deleted items.) Deleted files that cannot be recovered using Outlook will not be recovered by UTS. With Outlook you will have over a month to retrieve deleted items.

The Outlook window has the look and feel of other Windows applications. The toolbars are similar, although Outlook has a Navigation Pane on the left side of the window that is not in most other Windows applications. In Outlook there are multiple ways of doing everything. If you right-click on almost anything you will see a menu which will give you a list of choices showing other options for accomplishing many simple tasks.
Outlook Account for this Class
For this class you will be using a test Outlook account that will expire when class is over.

Setting the Password on Your account

Go to VIP to reset your password: https://vip.sc.edu/. The password for your account will expire every six months. You are required to change your password before you log on to your account in Outlook for the first time.

The Outlook Window

When you open Outlook you will see the Navigation Pane on the left. We will call the middle pane the Display Pane and the pane on the right, when in Mail View, is the Reading Pane. The first time Outlook is opened, it will be open in Mail View.

Navigation pane

When you open Outlook you see the Navigation Pane on the left side of the window. At the bottom of the Navigation Pane are buttons to open frequently used features including Mail, Calendar, Contacts, Tasks, Notes, and Folder List. At the top are the folders for the selected view. Between the folder-list at the top and the buttons at the bottom, is a horizontal separation bar. This bar can be dragged down allowing more space for the folder list and collapsing the buttons into small icons.
If you select Mail in the Navigation Pane, the Navigation Pane will then display the email folders above the bar. To expand a folder, to see the sub-folders click the small square that contains a plus sign to the left of the folder. The plus sign will change to a minus sign and the subfolders will become visible. You can then click on a folder to open it. When it opens, the list of messages in that folder will be displayed in the Display Pane and the message selected will be displayed in the Reading Pane.

The image below shows the Navigation Pane with the separation bar dragged down. Notice that there are icons instead of buttons.

To open and close the Navigation Pane you can hold the Alt key down on the keyboard and press the F1 key. This works as a toggle switch. You can also click View in the toolbar and select Navigation Pane.
In the image below, *Navigation Pane Options* was clicked to open the *Navigation Pane Options* dialog box to show that you can add or remove buttons in the *Navigation Pane*. 
Display Pane

The Display Pane is the pane to the right of the Navigation Pane. When the Mail view is selected in the Navigation Pane, the Display Pane contains the list of email messages and the Reading Pane is shown to the right of the Display Pane. In the Mail view, the Display Pane is sometimes called the Message Pane because it will contain the list of email messages. In the Calendar, Contacts, Tasks, and Notes views, the Display Pane contains the calendar, contacts list, tasks lists, or notes and fills the window from the Navigation Pane to the right edge of the window. There is no Reading Pane.

Reading Pane

The email message selected in the message list in the Display Pane is displayed in the Reading Pane. The Reading Pane can be turned off by clicking View on the toolbar and selecting Reading Pane and then selecting Off. To put it back click View and select Reading Pane and then Right. You can also click View and then Reading Pane and then select bottom to move it to the bottom of the window under the Display Pane. The size of the Reading Pane can be changed by dragging the edge of the pane with the mouse.

Items which have been previewed in the Reading Pane will no longer appear in bold in the message list in the Display Pane. The messages in the Display Pane shown in bold are considered Unread; they have not been selected so they have not been opened or displayed in the Reading Pane.

General Outlook Information

Log into Outlook

To log into Outlook: Click to open Outlook and enter ds\ followed by your user name in the User Name box. Enter your password and click OK. The username in this example is utstr3.

Note: It is ds followed by a backslash. If you use the forward slash by mistake a pop-up box will open telling you of the mistake.
The Outlook Window in Mail view.

When in the Mail view you can see the Outlook Email Folders displayed in the Navigation Pane.

Outlook Email Folders

- **Inbox** — contains all received email
- **Sent Items** — contains all sent email
- **Outbox** — contains messages that are in the queue for sending. There is not a folder equivalent to this in GroupWise. This folder will usually be empty. Email in the Outbox moves to the Sent Items folder when it is sent.
- **Drafts** — contains items that are incomplete or that you decided to send later. This is like Works in Progress in GroupWise.
Email Message Formats

HTML
HTML is the default format for Outlook. It allows backgrounds, and nice formatting but it is the format most likely to carry a virus. Some email users disable viewing messages in HTML and only see the plain text interpretation of the message. A message sent in HTML format will always be larger than the same message sent in plain text format. You can also insert images into the text of an email message but it is not recommended. The recipient may not use Outlook to read the email so the image may not display when the email is opened. Their email may display a large image that is a message instead of your image making it difficult to read your text. Outlook users can set Outlook to not display images. If you need to send images send them as attachments.

Rich text
Rich text messages can be formatted but are not readable by many email clients. Some clients can open the email but not the attachments sent with these messages.

Plain text
Plain text messages can be read by all email clients. It is more secure than HTML but the text cannot be formatted in the fancy manner like a message in HTML format and pictures cannot be embedded like they can in HTML format.

The Ribbon Panel in Outlook 2007

Outlook 2007 uses a new toolbar panel called the Ribbon for item windows (e.g. e-mail messages, appointments, etc.). The Ribbon replaces most toolbars and menus and is intended to make application features accessible with fewer clicks. It categorizes application features into command tabs and feature groups. Each tab relates to a different type of activity and could contain any number of feature groups.
The **Ribbon** can be minimized and restored by pressing **CTRL + F1**. The figure below shows the minimized version of the **Ribbon**.

Additionally, Outlook 2007 item windows contain a **Quick Access Toolbar** which is located on the title bar. The toolbar contains icons for some of the most commonly-used commands such as Save and Undo. Additional icons can be added to the toolbar by clicking the down arrow to the right of the toolbar. When the **Customize Quick Access Toolbar** pop-up menu appears, you can select additional commands to be added to the toolbar.
Spam/Junk Folders

USC uses SonicWALL as a spam filter so you do not need to use the one that is in Outlook except for the small amount of junk email that gets past SonicWALL. Your SonicWALL account is setup with a set of default options. You can log into SonicWALL and change these options, view the messages that have been filtered and select the messages that are not actually spam to be unjunked and moved to your Inbox. It is not necessary to do so, however, if you want to keep the default settings. SonicWALL will periodically send you an email message that lists the filtered messages.

To read about SonicWALL go to [http://www.sc.edu/universityemail/spam.shtml](http://www.sc.edu/universityemail/spam.shtml). The SonicWALL login page is at [https://myspam.mail.sc.edu/login.html](https://myspam.mail.sc.edu/login.html).

Attachments and Viruses

Outlook 2007 has a high level of virus protection but it is important that you take the proper precautions to prevent your computer from getting a virus. Always keep your antivirus program up-to-date. Use caution when choosing to open an attachment. Attachments can contain viruses and opening an infected attachment is the easiest way to get a virus through email. If you receive
an email that contains an attachment; do not open the attachment until you determine if there is a legitimate reason for the sender to send that attachment. To prevent viruses, Outlook 2007 blocks executable attachments with over fifty different file extensions. Macros in Microsoft Office files are deactivated by Outlook 2007.

**Recovering Deleted Messages**

Back-up copies of the email on the server are kept, but they are for disaster recovery only, not for retrieving accidentally deleted messages. Outlook gives you multiple chances for recovering deleted email. You can move it back out of the *Deleted Items* folder if it is still there (7 days). After it is removed from the *Deleted Items* folder it can still be recovered from Outlook for 30 days. (See *Recovering deleted items.*) Deleted messages that cannot be recovered using Outlook will not be recovered by UTS.

**Finding Help in Outlook**

The *Help* features of Outlook are useful and easy to use. You can use the Help menus, ask a question, or use the office assistant. Some of the selections in the Help menu link to short easy on-line training sessions.

**To open the Help menu:**

1. Click on the *Help* button on the toolbar
2. Select *Microsoft Office Outlook Help*

Outlook’s help feature also allows you to ask questions.

**To ask a question:**

1. Type your question in the *Type a question for help* text box near the top right corner of the window.
2. Press *Enter* on the keyboard

To close the help window click the x in the upper right corner of that window.

**Send/Receive**

Email messages are automatically sent when you click *Send* and messages are automatically moved to your *Inbox* at regular intervals. You can click *Send/Receive* on the toolbar to request an immediate update of your *Inbox* instead of waiting for the next update.

**Checking the Size of Your Outlook Files**

In the image below the *Mail* view is shown with the *Folder List* icon (it looks like a folder) at the bottom of the *Navigation Pane* clicked. Notice that all of the folders, calendar, contacts, etc. appear in the *Navigation Pane* not just the email folders.
Select **Folder Sizes** from the **Navigation Pane** and the **Folder Size** dialog box will open showing total size and the size of each of the folders. This is useful for comparing to your quota size.
Outlook Web Access

A version of Outlook is available online at https://webmail.sc.edu/
Mail

Exercise 1: Sending a Message

1. Click Mail in the Navigation Pane.

2. Click New in the upper left corner of the standard toolbar (along the top) to open a new message box.

3. Enter utstr3@mailbox.sc.edu in the To box.

4. Press the tab key or use the mouse to move down to the Cc box. Enter the address that you were given to use today to send a copy to yourself.

5. Use the tab or the mouse to move to the Subject box and enter First Test E-mail.

6. Use the tab or the mouse again to move to the Message box.

7. Enter a short message.

8. Click Send in the upper left corner of the toolbar to send the message.

9. Click Send/Receive on the standard toolbar.
Exercise 2: Receiving a Message

You should now see First Test E-mail in the list of e-mail messages.

1. Select the message. It will then be highlighted.

   You can now read the message in the Reading Pane. If the message is long you will need to use the scrollbar. You can click Reply in the standard toolbar to reply to this message since it is selected.

2. Open the message in a new window by double-clicking the message in the list. It may be easier to read in this window than in the Reading Pane.

Exercise 3: Replying to a Message

After you have opened the message:

1. Click Reply in the Respond feature group and a new message box will open with the sender’s address in the To box.

2. Enter a short message above the original message box.
3. Click *Send*. The message box will close.
RE: First Test E-mail

From: TRAIN2, UTS
Sent: Friday, March 21, 2008 2:49 PM
To: TRAIN3, UTS
Subject: First Test E-mail

Hello,

This is a test e-mail from utstr2

---

You replied on 3/21/2008 2:52 PM.

From: TRAIN2, UTS
To: TRAIN3, UTS
Cc:
Subject: First Test E-mail

Hello,

This is a test e-mail from utstr2
Exercise 4: Attaching a File and Setting Importance Level

1. Click *New* on the standard toolbar.

2. Enter utstr3@mailbox.sc.edu in the *To* box.

3. Move down to the *Cc* box. Enter the address that you were given to use today.

4. Move to the *Subject* box and enter **Second Test E-mail**.

5. Move to the *Message* box.

6. Enter a short message in the message box.

7. Click the *Insert* command tab. Click *Attach File* in the *Include* feature group to open the *Insert File* dialog box.

8. Click *Desktop* on the left.

9. In the right-hand pane, select **Bubble.JPG**, and click *Insert*. 
10. On the message box, Bubble.JPG will appear in the Attached textbox under the Subject box.
11. Attach another file by clicking the **Insert** command tab followed by clicking **Attach File**. Attach **TestAttach.doc** from the **Desktop**. There should be two files in the **Attached** textbox.

12. Delete the **TestAttach.doc** from the **Attached** list by clicking on it to highlight it and pressing the delete key or the backspace key on the keyboard. (If you double-click it will open the attachment.)

13. Re-attach **TestAttach.doc**.

**Setting the Importance Level indicator on this message:**

14. While on the **Message** command tab, select the **High Importance** level icon in the **Options** feature group to indicate to the recipient that the e-mail is important.

15. Now switch to low importance; select the icon for **Low Importance**.

16. You changed your mind; click the low importance icon again to remove it. The level of importance is now set to normal (No indicator)
17. You decided it is extremely important so select the icon for **High Importance** again.

18. Click **Send**.

19. Click the **Send/Receive** button.

**Exercise 5: Opening Attachments**

1. Look at the message list and notice the importance indicator.

2. Open the **Second Test E-mail** message by double-clicking on it in the list. You will see a tab for the message and each of the attached files right below the **Subject** line (refer to the image below).

3. Click on the tab for **Bubble.jpg**. A preview of the image is shown in the message box’s text area. If you double-click the tab, the image will be opened in a separate viewer window. If the attachment is an image it will open in a viewer. Close the viewer.

4. Now click on the tab for **TestAttach.doc**. A warning will appear in the text area alerting you that you should only preview files from a trustworthy source. If you double-click the tab an alert box will open asking if you want to **Save, Open or Cancel**. Select **Open**.
5. Close the file.

6. Close the e-mail message.

**Exercise 6: Creating a Draft**

1. Click *Mail* in the *Navigation Pane*.

2. Open a message box by clicking *New*.

3. Enter *utstr2@mailbox.sc.edu* in the *To* box.

4. Enter *Testing Drafts* in the *Subject* box.

5. Close the message box by clicking the *x* in the upper right corner. An alert box will open.

6. Click *Yes* on the alert box. The message will be saved to your *Drafts* folder.

7. You can see [1] to the right of *Drafts* in the *Folder List* in the *Navigation Pane*. It represents the number of drafts in the folder.

8. Open the *Drafts* folder by clicking on it in the *Navigation Pane* and you will see the *Testing Drafts* message in the message list.
9. Open the draft.

10. Add more text to the message.

11. Click **Save** (floppy disk icon) on the Quick Access Toolbar and close the message box. Alternatively, close the message box and then click **Save** on the alert box that appears.

12. Open the message and click **Send**.

13. Open the **Sent Items** folder and look at the messages.

**Exercise 7: Sorting Messages**

You can sort the messages by the date and time it was received, the sender, the subject, the size, if it has attachments, the importance indicator, flag status, categories, and by icon (e-mail, meeting request, undelivered e-mail notice, read receipt, etc.). To sort the message list in ascending order, click on the name of the column in the **Display Pane**. A small arrow will appear at the top of the column. Click on that column header again to change the sequence to descending order. The arrow will then point the opposite direction. Try these out as you continue through the exercises.
Exercise 8: Searching

The *Search In* textbox is located at the top right corner of the *Display Pane*. You may simply type the keywords for which you want to search in the textbox and press enter. By default, the *Inbox* is searched and the results are shown in the *Display Pane* with the search keywords highlighted. To clear the search, click on the *x* icon to the immediate right of the *Search* box.

To customize, click the down double-arrow to the right of the *Search* box. This allows you to specify additional field/criteria search restrictions.

Additional search options can be accessed by clicking on the down arrow (single not double arrow) to the right of the *Search* box and selecting *Search Options*.

Exercise 9a: Deleting Messages — Moving Items to and from the *Deleted Items* Folder

1. Select the third message on the list in the *Inbox* by clicking to highlight it.
2. Click the **Delete** icon on the standard toolbar (x icon) to delete it. The message is no longer on the **Inbox**.

3. Open the **Deleted Items** folder to see the deleted message.

4. You decide that you deleted the wrong message and you want to get the message back from the **Deleted Items** folder. Select the message in the **Deleted Items** folder and move it back to the **Inbox** (hold the left mouse button down, drag and drop the message onto **Inbox** in the **Folder List**).

**Note:** Items will remain in the **Deleted Items** folder for seven days unless you open the **Deleted Items** folder and delete them again. They can still be recovered for 30 more days. (See Exercise 9c).

**Exercise 9b: Deleting Messages — More on Deleting Messages**

You decide that you want to delete the first, third and forth messages in the **Inbox** folder.

1. Select the first, third and forth messages in the list by clicking the first message to highlight it and holding the **Ctrl** key down click on the third and then the fourth.

2. Click the **Delete** icon on the standard toolbar to move them to the **Deleted Items** folder.

3. Open the **Deleted Items** folder to see the deleted messages.

4. Select the first three messages in the **Deleted Items** folder by clicking on the first message and then while holding the **Shift** key down click on the third message.

5. Click the **Delete** icon to delete these messages from the **Deleted Items** folder. (We did not wait for them to be deleted in seven days we went ahead and deleted them ourselves.)

6. You have changed your mind; you need the first two messages after all. If it has been less than 30 days you can still recover items that were deleted from the **Deleted Items** folder no matter whether you deleted them or they were automatically moved after 7 days.
Exercise 9c: Deleting Messages — Recovering Deleted Items

For the first seven days you can move items out of the Deleted Items folder. After they are removed from the Deleted Items folder you can still recover them for 30 days.

1. Open the Deleted Items folder.

2. Click Tools on the menu bar and select Recover Deleted Items and a new window will open (Recover Deleted Items From – Deleted Items)

3. In the new window, select the items that you want to recover.

4. There are three icons at the top of the window. If you hold the mouse over each one you can read what they are. Click the middle one, Recover Selected Items. The selected items will be moved to the Deleted Items folder. You can then move them to the Inbox or to any folder that you want.

Exercise 9d: Permanently Deleting Messages

These messages will bypass the Deleted Items folder and the retention folder and cannot be recovered. You could accidentally select the message next to the one that you want to delete so it is better not to ever use this.
To permanently delete a message:
1. Click on the message in the message list to select it.

2. Hold down the Shift button on the keyboard and press the Delete key.

**Exercise 10a: Requesting Delivery and Read Receipts**

**Note:** Unlike with GroupWise, with Outlook you will not be able to find out if an email message was opened unless the recipient chooses to respond to your Read Receipt. If a colleague, a co-worker, or your boss requests a Read Receipt you would certainly comply. In the business world, Read Receipts are only requested when they are needed. You cannot find out if an email was deleted.

You can also request to be notified when the message that you sent is delivered (Delivery Receipt). If a delivery receipt is requested, when the e-mail is delivered the sender will get an e-mail stating that the e-mail was delivered.

**To request a delivery receipt and a read receipt:**

1. Click Mail in the Navigation Pane.

2. Open a new message box by clicking New on the standard toolbar.

3. Click the Options command tab.

4. Check the checkbox next to Request a Delivery Receipt and Request a Read Receipt.
5. Enter a classmate’s class e-mail address in the **To** box, and enter **Testing Receipts** for the **Subject** and also for the message.

6. Click **Send**. You will receive the **Delivered Receipt** from the **System Administrator** in your **Inbox**.

![Inbox](image)

**Note:** When the message that you sent is opened, the recipient can choose not to send the receipt or can set Outlook so that it never sends a **Read Receipt**.

**Exercise 10b: Sending or Rejecting Read Receipts**

When you open the message an alert box will open asking if you want to sent a receipt. If you click **Yes** the sender will receive a message stating the date and time that the message was opened. If you click **No** the receipt is not sent and the sender has no way of finding out if the message was ever opened.

1. Open the message from your classmate.
2. An alert box will open asking if you want to send a receipt. Click **Yes**.
3. Close the e-mail message.
Exercise 11: Creating a Signature

You can create a signature so that information such as your name, phone number, department name, etc. will automatically appear at the bottom of your e-mail.

To create a signature:

1. Click **Tools** in the menu bar, and click **Options**.

2. Click **Mail Format** (tab along the top) on the **Options** dialog box.

3. Click **Signatures** and the **Signature and Stationary** box will open.

4. Click **New**. The **New Signature** alert box will open.

5. Enter your name for the signature and click **OK**.

![Image of Outlook Options and Signatures dialog boxes]
6. Enter your name and any other information you want the signature to include in the *Edit Signature* textbox.

7. Click *Save*.

8. To apply the signature you just created to new messages, click on the drop-down arrow to the right of *New messages* and select the signature. You may do the same for *Replies/forwards* if you wish.
9. Click **OK** and the *Signatures and Stationary* box will close leaving the *Options* dialog box showing again.

10. Click **OK** one more time to close the *Options* dialog box.

11. Try this out, click **New** on the menu bar and look at the signature that appears in the message box.

Exercise 12: Out of Office Assistant

To automatically send an out of office message:

1. Click **Mail** in the *Navigation Pane*.

2. On the menu bar, click **Tools** and then click **Out of Office Assistant**. The *Out of Office Assistant* dialog box will open.

3. Select **I am currently out of office**.

4. In the text area provided, type the desired auto-reply message.

5. If you do not want to add any additional rules for auto-reply messages, click **OK**.

**Note:** By default and without additional rules, the *Out of Office Assistant* replies to e-mails sent from external mail systems as well as from within USC.
Flagging Items

The flags are to remind you to follow up on a message. The flag can be set to one of six options and a reminder can be set so that you are reminded at a specific time that you need to follow-up on that particular message. After you have followed-up on that message you can change the flag to a check mark to indicate completion. You can sort by flag. (See Exercise 7)

Exercise 13a: Flagging an Item

1. To flag an item in the Inbox, right-click the gray flag to the far right of the item in the Display Pane.

2. On the pop-up menu that appears, click Add Reminder or Custom and the Custom dialog box will open.

3. Click on the arrow to the right of the Flag to box, and select Follow up from the drop-down menu that appears.
4. Click on the arrow to the right of the *Due date* box, a *Date Navigator* box opens. Click *Today*.

5. Below the *Reminder* check box, there are two drop-down menus; one for date and another for time. Click on the arrow next to each and specify the date and time at which you want to be reminded to follow up on the item.

6. Click *OK*.

7. At the specified reminder time, a *Reminder* dialog box will open, showing the item you flagged and any other items with set reminders.

8. Select the flagged item from the list and click *Dismiss*.

9. An alert box will open asking you to confirm whether you are sure you want to dismiss the reminder, click *OK*.
Exercise 13b: Clearing Flags

1. Right-click the colored flag for the item in the previous assignment and the pop-up menu will appear.

2. Click Clear Flag. The flag will return to its original gray color and the reminder is removed.

Color Categories

Color categories are used to visually categorize items. They can be assigned to messages, appointments, contacts, and other Outlook items. Assigning colors to items makes it easier and faster to identify, organize, and sort related items.

Exercise 14a: Assigning Color Categories to a Message

1. Right-click on the message you wish to categorize (in the space below the Categories column).

2. On the pop-up menu that appears, click on the color category that you would like to assign to the message.

3. If this is the first time you are using the color category, an alert box will appear allowing you to assign a name and a shortcut key to the chosen category.
4. If you want to assign more color categories to the same message, simply repeat the previous steps for each additional category.

**Exercise 14b: Creating and Assigning a New Color Category**

1. Right-click on the message you wish to categorize (in the space below the Categories column).

2. On the pop-up menu that appears, click *All Categories* and the *Color Categories* dialog box will open.

3. Click *New* … and the *Add New Category* dialog box will open.

4. Type a category name in the *Name* box and select the color you would like to assign to the category.

5. Click *OK* and you will see the newly-created color category appear in the *Color Categories* dialog box.

6. Select all the color categories you wish to apply to the message by selecting the checkbox to their left.

7. Click *OK*. All the selected colors will be applied to the message.
Exercise 14c: Clearing Color Categories

1. Right-click the color categories for the message in the previous exercise and a pop-up menu will appear.

2. Click *Clear All Categories*. 
Contacts

Exercise 1: Creating a New Contact

1. Click Contacts in the Navigation Pane. The contents of the Contacts folder are displayed in the Display Pane.

2. On the standard toolbar, click New and the Contact form will open.

3. Enter John Doe in the Full Name box.

4. Enter 1602 Main Street Columbia, SC 29201 in the Addresses textbox.

5. Enter utstr2@mailbox.sc.edu in the E-mail box.
6. Click **Save and Close** on the **Contact** form.

**Note:** To save the current contact and open a new contact form to create another contact, you would click **Save and New** (icon to the right of **Save and Close**) instead.

---

**Exercise 2: Adding to Contacts from Within an E-mail Message**

1. From the **Inbox**, open the e-mail message from someone in this class to add to your contacts list.

2. Then right-click on the name (or e-mail address) of the person you want to add and click **Add to Outlook Contacts**.

3. A **Contact** form will open containing the e-mail address and the name if given. You could enter more information for that contact by clicking on **General** and/or **Details** on the **Show** feature group of the **Contact** command tab.
4. Click *Save and Close*.

**Exercise 3: Working With Contacts**

1. Click *Contacts* in the *Navigation Pane*.

2. The folder view layout can be changed by selecting the desired layout from the list of options displayed under *Current View* in the *Navigation Pane*. Click on each of these and look at the difference.

3. **To change the information for a contact:** double-click on the contact, and change the job title and company. Click *Save and Close*.

4. **To create an e-mail message addressed to the contact:** click *E-mail* on the *Communicate* feature group of the *Contact* command tab. A new message box will appear with the contact as a recipient.

**Distribution Lists**

**Exercise 4: Creating a Distribution List**

1. Click *Contacts* in the *Navigation Pane*.

2. On the standard toolbar, click on the arrow to the right of the *New* button and a drop-down menu will appear.

3. Click *Distribution List* and the *Distribution List* form will open.
4. Type OutlookTraining in the Name box.

5. Click on Select Members and the Select Members dialog box will open.

6. Search for two other persons in the class to add to the distribution list, select each from the Global Address Book, and click Members - >.

7. Click OK.

8. Click Save and Close on the Distribution List form. The new distribution list will be added to your Contacts folder.

**Exercise 5: Sending E-mail Messages to a Distribution List**

1. Click Mail in the Navigation Pane.

2. On the standard toolbar, click New to open a new message box.

3. Type OutlookTraining in the To box.

4. Type Testing Distribution List in the Subject box.

5. In the body of the message, type Testing.

6. Click Send.
Archiving

Exercise 1: Creating Archive Files

1. On the menu bar, click File and then click Archive. The Archive dialog box will open.

2. Select Inbox from the folder list displayed.

3. Click on the arrow to the right of the Archive items older than box and the Date Navigator will appear.

4. Click on tomorrow’s date on the Date Navigator.

   Note: Normally, you do not set the threshold to a future date. However, to see the effect of archiving in this course we use a future date so that today’s items are archived.

5. An alert box will open notifying you that the date selected is in the future and it will cause your current items to be archived as well. Click OK.

6. Select the Archive this folder and all subfolders option if not already selected.

7. Check the box next to Include items with “Do not AutoArchive” checked.

8. For this class, do not change the default path for the archive file from what is already typed in the Archive file textbox.

9. Click OK.

10. All items are removed from the Inbox.

   Note: The PST files are not encrypted. Unlike GroupWise, archived items on your machine will not encrypted.

11. The Folder List in the Navigation Pane is updated to include Archive Folders.

12. Click on the + sign to the left of Archive Folders to expand it, and click Inbox that appears as a subfolder of Archive Folders.
13. The contents of the archived **Inbox** folder are displayed in the **Display Pane**.

Exercise 2: Accessing Archive Files

Step 1 below removes **Archive Folders** from the **Navigation Pane**.

1. Right-click on **Archive Folders** in the **Navigation Pane**, and click “Close Archive Folders” on the pop-up menu that appears.

To make **Archive Folders** visible in the **Navigation Pane**:

2. On the menu bar, click **File**, and select **Open**. On the pop-up menu that appears, click **Outlook Data File** and the **Open Outlook Data File** dialog box will open.

3. Select the PST file in the folder contents area.

4. Click **OK**.

5. **Archive Folders** is now restored in your **Folder List** in the **Navigation Pane**.
Calendars

Exercise 1: Viewing the Calendar

1. Click Calendar in the Navigation Pane.

2. The first time you open the calendar the Day view will be displayed in the Display Pane. You can change the view from the current view by clicking on one of the three tabs at the top of the Display Pane: the Day view, the Week view, or the Month view. Click on each of these to try them out.

3. The Date Navigator is the calendar in the upper left corner that allows you to click on a particular date, a group of consecutive dates using the Shift key or by dragging the mouse, nonconsecutive dates using the Ctrl key, the arrows, the name of the month or the days of the week to change the dates or the selected view that is shown in the large pane in the center.
As you click on the *Date Navigator* notice how the view in the *Display Pane* changes.

- Click the forward and backward arrows to scroll to a different month.
- Click on the month between the arrows and select a different month.
- Click a different date.
  
  To select a specific day, navigate to the desired month and click on the desired day on the *Date Navigator*. The schedule for the selected day will be displayed in *Daily* view in the *Display Pane*.

- Click on more than one day using the *Shift* key or the *Ctrl* key.

**Exercise 2: Creating Appointments**

**To create a new appointment:**

1. Click *Calendar* in the *Navigation Pane* and then click *New* on the standard toolbar. The *Appointment* form will open.

2. Enter *Test Appointment 1* for the *Subject* and *Sumwalt 361* for the *Location*.

3. Fill in the *Start Time* for the meeting to be today at 3:00 PM and the *End Time* to be 4:00 PM.
4. Click *Save and Close*.

5. Look at the calendar using the *Day*, *Week*, and *Monthly* views.

6. From the week view, double-click on the appointment and change the time to 11:00 AM - 12:00 noon.

7. Click *Save and Close*.

8. Click *New* to open a new *Appointment* form.

9. Enter **Test Appointment 2** in the *Subject* textbox and enter **Sumwalt 361** in the *Location* textbox. Select tomorrow’s date and set the appointment time to 1:00 PM - 2:00 PM.

10. To view your existing meeting appointments, click on the *Scheduling* tab. Use the scroll bar to navigate through the *Free/Busy* timeline. The legend at the bottom of the timeline explains the scheduling classification of each meeting displayed on the timeline. The *scheduling* feature allows you to select a suitable time for the meeting that you are about to add, given your current schedule.

11. To invite others to attend the meeting, click *Invite Attendees* on the *Actions* feature group of the *Meeting* command tab. Insert today’s e-mail address of two other people in the class. If you want to select them from the *Global Address List* click the *To* box and the *Select Attendees and Resources* dialog box will open, search for the name (for this class the last
name is Train followed by the number in their login name, ex: Train4 or Train16) in the Global Address Book and click either Required or Optional. Click OK.

12. Click Scheduling on the Show feature group of the Meeting command tab and you will be able to see the schedule of the people you invited since they are also using the USC e-mail system.

13. Click Send. A meeting invitation will be sent to all of the attendees, yourself included. You will also be notified when each attendee responds to the invitation.

Exercise 3: Creating Recurring Appointments

1. Click New on the standard toolbar to open a new Appointment form and create an appointment for today from 5:00 -7:00 PM called Test Recurring Appointment to be held in Sumwalt 340.

2. Click Recurrence on the Options feature group of the Meeting command tab.

3. When the Appointment Recurrence pattern dialog box opens, fill in the appropriate information to describe the pattern, weekly, monthly, etc. and the range of the recurrence and click OK.
4. Since there are no other attendees, click **Save and Close**.

   **Note:** If you are the organizer of the meeting and there are other attendees, do one of the following:

   a. If you are adding the recurrence to an existing appointment (i.e. modifying the appointment), click **Send Update** on the **Appointment** form. An updated meeting invitation message will be sent to all attendees. Once they have accepted to attend, the appointment and its subsequent occurrences will be updated on their calendars. If you do not send an update, the appointment will not be updated on their calendars.

   b. If you are adding the recurrence to a new appointment, click **Send**.

**Exercise 4: Removing Appointment Recurrence**

1. On the **Calendar**, double-click on the recurring appointment that you just added. A dialog box will open asking you whether you would like to open the specific occurrence of the appointment or the series of recurring appointments.

2. Select **Open the series** and click **OK**.

3. When the **Appointment** form opens, click **Recurrence** on the **Options** feature group.
4. When the Appointment Recurrence dialog box opens, click Remove Recurrence.

5. Click Save and Close.

Note: If you remove recurrence from an appointment, only the original instance of the appointment will remain on your calendar. All subsequent occurrences will be removed. If there are other attendees, be sure to click Send Update on the Appointment form after you have made the desired changes. If you do not send an update, the appointment will not be updated on the attendees’ calendars.

Exercise 5: Modifying Individual Occurrences of a Recurring Appointment

1. Click New to open the Appointment form and create an appointment for Thursday from 5:30 -7:30 PM called Test Recurring Appointment 2 in Sumwalt 340.

2. Click Recurrence.

3. When the Appointment Recurrence pattern dialog box opens, fill in the appropriate information to describe the pattern and range of the recurrence and click OK.

4. Click Save and Close.

5. On the Calendar, double-click on the second occurrence of the recurring appointment.

6. A dialog box will open asking you whether you would like to open the specific occurrence of the appointment or the series. Select Open this occurrence and click OK.

7. Change the end time on the Appointment form 7:30 PM to 8:00 PM and click Save and Close.

Note: The changes made will affect only that specific occurrence but not the entire series. If there were other attendees, you would click Send Update on the Appointment form after you have made the desired changes.

Exercise 6: Canceling Recurring Appointments

1. On the Calendar, select the recurring appointment that you want to cancel.

2. Click the Delete icon on the standard toolbar and an alert box will open.

3. Select Delete this Occurrence and click OK.

Notes: If you are the organizer of the appointment and there are other attendees, a new message box appears allowing you to compose a message to inform the other attendees of the cancellation. You can type in a cancellation message or simply click Send Cancellation. If you attempt to close the message box, an alert box appears asking you to either send the
cancellation or not to cancel the meeting and close the message box. Select *Send cancellation* and the meeting cancellation message will be sent to all attendees.

When a recurring appointment is deleted, only the specific occurrence you selected will be deleted. Other occurrences will remain on the calendar.

**If you are an attendee of a recurring appointment and you receive a cancellation message**, open the message, and click *Remove from Calendar*. If you do not do this, the appointment will remain on your calendar.

**If you are an attendee of a recurring appointment and you want to remove an occurrence** of the appointment from your calendar (effectively declining to attend), select the occurrence you want to delete. Click the *Delete* icon on the standard toolbar. An alert box will open asking you if you want to delete the specific occurrence or the series. Select the desired option and click *OK*. Another alert box will open asking you if you want to send a response to the meeting organizer or not. If you choose to send a response, a third alert box will open asking if you want to edit the response before sending it. Choose the desired option and follow any additional instructions for completing the deletion.
Exercise 7: Responding to a Meeting Request

1. Since you called the meeting you are the meeting organizer and will receive the invitation responses in your Inbox. When each invitation response is received, the number of responses for each type of attendee (required or optional) will be updated on the Appointment form for that meeting. Click on Tracking on the Show feature group of the Meeting command tab to view the type of attendance and the response of each attendee.
2. When you open an invitation to a meeting there are three response options in the invitation message: *Accept*, *Decline*, and *Tentative*. Click *Accept* for the ones you receive in class.

![Meeting Invitation Response Options]

Then an alert box will open, providing three more options: *Send the response now*, *Don't send a response*, or *Edit the response before sending*. Click *Send the response now*.

![Meeting Invitation Alert Box]
Note: The Appointment form for a meeting to which you have been invited contains a Propose New Time button on the Respond feature group of the Meeting command tab. When this button is clicked, the Propose New Time box opens. Select a new time, and click Propose Time. A message box will open, edit the message if you like, and click Send. The message sent to the organizer will indicate that your acceptance is tentative and shows the time you proposed for the appointment. Also, the proposed time slot is marked as tentative on your calendar. The Appointment form will include a comment showing that you have responded with a new proposed time.

Note: If you decline a meeting invitation by clicking the Decline option, the meeting will not be added to your calendar.

Exercise 8: Moving an Non-Recurring Appointment to a Different Date

You can drag and drop to change the date or time of an appointment.

1. Click Calendar in the Navigation Pane and then click New on the standard toolbar.

2. On the Appointment form, enter Test Appointment 3 for the Subject and Sumwalt 361 for the Location. Fill in the start time for the meeting to be 8:00 AM and the end time to be 10:00 AM on Saturday.

3. Click Save and Close.
4. **To change the date of the appointment:** On the **Week** view of the **Calendar**, select the appointment, **Test Appointment 3**, and drag the appointment and drop it on Friday.

**Exercise 9: Copying an Appointment to another Time**

To **copy an appointment to a new time/date and not change the original appointment**:

1. Click **Calendar** in the **Navigation Pane**.

2. On the **Calendar**, select the appointment you want to copy.

3. Right-click and drag the appointment to the new time and/or date.

4. On the alert menu that appears, click **Copy**. This will retain the original appointment and create a second appointment on the specified date and time.

**Exercise 10: Creating an Additional Personal Calendar**

To **create another calendar**:

1. On the menu bar, click **File**, select the arrow next to **New**, and click **Folder**.

2. When the **Create New Folder** dialog box opens, enter your name for the name of the new calendar in the **Name** box. Be sure that **Calendar Items** is selected from the drop-down menu for **Folder contains**.

3. You can select the folder in which you want to place the new calendar from the list shown under **Select where to place the folder**. We will leave it under **Calendar**.

4. Click **OK**. Notice the new folder in the list in the **Navigation Pane**.

**Exercise 11: Viewing Multiple Calendars**

To see multiple calendars side by side:

1. Click **Calendar** in the **Navigation Pane**.

2. When **Calendar** is selected in the **Navigation Pane** the options for the **Calendar** folder are visible at the top, you will see the names of all existing calendars under **My Calendars**.

3. Check the box next to **Calendar** (the original calendar) and the one with your name that you just created. Outlook will show all selected calendars side by side in the **Display Pane**.
Exercise 12: Deleting Personal Calendars

1. While in one of the Calendar views look under My Calendars at the top of the Navigation Pane and right-click on the calendar that you want to delete.

2. On the pop-up menu that appears, click Delete “Personal Calendar”.

Note: You cannot delete the default calendar in Outlook. You can only delete personal calendars that you created.
Free/Busy Search via Group Calendars

Exercise 13: Creating a View Group Schedule

1. Click Calendar in the Navigation Pane.

2. On the menu bar, click Actions. On the pop-up menu that appears, click View Group Schedules and the Group Schedules dialog box will open.

3. Click New and the Create New Group Schedule box will open.

4. In the textbox provided, type Test Group, and click OK.

5. The Test Group box opens allowing you to add members to the calendar group.
6. Under the *Group Members* column, type the usernames of two other people in the class (one username per line).

7. The member’s schedules will be shown in the *Free/Busy* area.
8. Click *Save and Close*.

**To view the group calendar at a later point in time:**

1. Click *Calendar* in the *Navigation Pane*.

2. On the menu bar, click *Actions*, and click *View Group Schedules* on the pop-up menu that appears.

3. The *Group Schedules* dialog box will open.

4. Select *Test Group* from the list of group calendars shown, and click *Open*.

5. The member’s current schedules are shown in the *Free/Busy* area.

6. Click *Save and Close*. 
Delegates

Exercise 1: Assigning Responsibilities to Delegates
(This was called Proxy in GroupWise)

1. On the menu bar, click Tools and then click Options.

2. When the Options dialog box opens, click on the Delegates tab.

3. Click Add.

4. The Add Users dialog box opens. Select another person in the class with whom you want to share your Inbox. Either double-click on the name or select it and click Add ->.

5. Click OK and the Delegates Permissions dialog box will open.

6. Click on the arrow to the right of the Calendar box, and select Editor.

7. Click on the arrow to the right of the Inbox box, and select Editor.

8. Click on the arrow to the right of the Tasks box, and select None.

9. Make sure that the following options are checked: “Delegates receive copies of meeting-related messages sent to me” and “Automatically send a message to delegate summarizing these permissions”.

10. Click OK on the Delegate Permissions dialog box.

11. Click OK on the Options dialog box.

Note: An e-mail message summarizing the permissions that you have assigned will be sent to the delegate.
Exercise 2: Accessing a Delegator’s Inbox

1. On the menu bar, click File, and select Open.

2. On the pop-up menu that appears, click Other User’s Folder and the Open Other User’s Folder dialog box will open.

3. In the Open Other User’s Folder dialog box, type the delegator’s username in the Name box. Alternatively, click Name and search for the person in the Global Address Book.
4. Click on the arrow to the right of the *Folder type* box, and select *Inbox* from the drop-down menu that appears (if not already selected).

5. Click *OK*.

6. The contents of the *Inbox* will be displayed in the *Display Pane*.

7. On the standard toolbar, click *New* to create a new e-mail message.

8. If the *From* box is not visible, click on the *Options* command tab and then select *Show From* on the *Fields* feature group. The message box will be updated to include the *From* box.

9. Type the e-mail address of the delegator in the *From* box.

10. In the *To* box, type your own e-mail address.

11. In the *Subject* box, type *Testing Mail Delegation*.

12. Click *Send*.
13. Now, click on **Inbox** in the **Folder List** in the **Navigation Pane**.

14. The contents of your **Inbox** will be displayed in the **Display Pane** and you should see a new message from the delegator.

15. Open the message. You will see a comment that says that the e-mail was sent from you on behalf of the delegator.

---

Exercise 3: Opening a Delegator’s Calendar and Creating a New Appointment

1. On the standard toolbar, click **File** and select **Open**. On the menu that appears, click **Open Other User’s Folder** and the **Open Other User’s Folder** dialog box will open.

2. Type the delegator’s username in the **Name** box. Alternatively, click **Name** and search for the person in the **Global Address Book**.

3. Click on the arrow to the right of the **Folder type** box, and select **Calendar** from the drop-down menu that appears.
4. Click **OK** and the delegator’s calendar will open in the **Display Pane**.

5. On the standard toolbar, click **Month**.

6. On the **Calendar**, select today’s date.

7. On the standard toolbar, click **New**. A new **Appointment** form will open.

8. Type **Testing Delegation** in the **Subject** box.

9. Type **Sumwalt 361** in the **Location** box.

10. Click the arrow for the second box to the right of **Start time**, and select 11:00 AM on the drop-down menu that appears.

11. Uncheck the **Reminder** box if it is already checked.

12. Click **Save and Close** and the new appointment will appear on the delegator’s calendar.

**Exercise 4: Responding to a Meeting Invitation on Behalf of the Delegator**

1. While in the delegator’s **Calendar**, select the appointment you created in the previous assignment.

2. Double-click the appointment to open it. The **Appointment** form will open.

3. In the **Actions** feature group of the **Appointment** command tab, click **Invite Attendees**. The **Appointment** form is then updated to include a **To** box.

4. In the **To** box, type the e-mail address of another person in the class.

5. Click **Send**. A meeting request will be sent to the person specified. The invitation message will show that it was sent from you on behalf of the delegator.

6. Click **Mail** in the **Navigation Pane**.

7. Wait for a meeting invitation message from another person in the class if you have not received one already.

8. Double-click the meeting invitation. The message box will open.

9. Click **Accept** on the **Meeting** command tab.
10. An alert box will open. Select the **Send the response now** option if it is not already selected.

11. Click **OK** on the alert box.

12. Now, open the delegator’s **Inbox** as instructed in Exercise 2.

13. You will see the acceptance message in the delegator’s **Inbox**.

**Exercise 5: Removing Delegation**

1. On the menu bar, click **Tools** and then click **Options**.

2. When the **Options** dialog box opens, click on the **Delegates** tab.

3. In the list of delegates displayed, select the name of the delegate you want to remove.

4. Click **Remove**. The delegate is removed from the list.

5. Click **OK** on the **Options** dialog box to close it.
Folders

Exercise 1: Creating a New Folder

1. On the standard toolbar, click on the arrow to the right of the New button and a drop-down menu will appear.

2. Click Folder and the Create New Folder dialog box will open.

3. Enter Test Folder in the Name box.

4. Click the arrow next to the Folder contains box, and select Mail and Post Items from the drop-down menu.

5. In the folder list box, select Inbox.

6. Click OK.

Note: The new folder will now be included in the Folder List in the Navigation Pane as a subfolder of the Inbox.

Exercise 2: Renaming a Folder

Note: You cannot rename the default Outlook folders such as Inbox, Drafts, or Deleted Items. You can only rename folders that you created.

1. On the Folder List in the Navigation Pane, expand the Inbox folder by clicking the + sign to its left.

2. Right-click on Test Folder.

3. On the pop-up menu that appears, click Rename “Test Folder”.

4. The folder name turns into an editable textbox with the old name highlighted. Type Test Inbox in the textbox provided.

5. Click away from the textbox.

Alternatively, you can double-click on Test Folder, the folder name turns into an editable textbox. Change the
folder name to **Test Inbox**, and click away from the textbox.

**Exercise 3: Moving a Folder**

**Note:** You cannot move the default Outlook folders. You can only move folders that you have created.

1. On the *Folder List* in the *Navigation Pane*, expand the *Inbox* folder by clicking on the + sign to the left of the folder icon.

2. Select *Test Inbox*.

3. While holding the left mouse button down, drag *Test Inbox* and drop it onto the *Drafts* folder.

4. The *Drafts* folder now has the minus sign (-) to the left of the icon and the *Test Inbox* folder showing below. Click the - sign and it will turn into a + sign and the *Test Inbox* folder will no longer be visible in the *Navigation Pane*. Now, expand the *Drafts* folder by clicking the + sign. You will again see *Test Inbox* as a subfolder of *Drafts*.

5. To move it back to the *Inbox*, select *Test Inbox* again.

6. While holding the left mouse button down, drag *Test Inbox* and drop it onto the *Inbox* folder.

**Exercise 4: Deleting a Folder**

**Note:** You cannot delete the default Outlook folders. You can only delete folders that you have created.

1. In the *Folder List* on the *Navigation Pane*, expand the *Inbox* folder by clicking the + sign to its left.

2. Right-click on *Test Inbox*.

3. On the pop-up menu that appears, click *Delete “Test Inbox”*.

4. An alert box will open asking you to confirm whether you are sure that you want to delete the folder. Click *Yes*.

![Microsoft Office Outlook](image.png)