### OUTLOOK 2007 INTERMEDIATE

**TABLE OF CONTENTS**

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>INTRODUCTION</td>
<td>VII</td>
</tr>
<tr>
<td>About This Course</td>
<td>viii</td>
</tr>
<tr>
<td>Using This Manual</td>
<td>viii</td>
</tr>
<tr>
<td>What You’ll Find in Each Unit</td>
<td>ix</td>
</tr>
<tr>
<td>What You’ll Find in Each Lesson</td>
<td>x</td>
</tr>
<tr>
<td>How to Use the Student Data Files</td>
<td>xi</td>
</tr>
<tr>
<td>How To Proceed</td>
<td>xi</td>
</tr>
<tr>
<td>MICROSOFT CERTIFIED APPLICATION SPECIALIST (MCAS)</td>
<td>XIII</td>
</tr>
<tr>
<td>How This Course Can Help You Prepare</td>
<td>xiii</td>
</tr>
<tr>
<td>Exam Requirements</td>
<td>xiii</td>
</tr>
<tr>
<td>UNIT 1 CUSTOMIZING OUTLOOK 2007</td>
<td>1</td>
</tr>
<tr>
<td>LESSON 1 CUSTOMIZING VIEWS</td>
<td>3</td>
</tr>
<tr>
<td>Introduction To Views</td>
<td>4</td>
</tr>
<tr>
<td>Creating Views</td>
<td>7</td>
</tr>
<tr>
<td>Customizing Fields For Views</td>
<td>11</td>
</tr>
<tr>
<td>Customizing Groups and Filtered Views</td>
<td>16</td>
</tr>
<tr>
<td>Customizing Automatic Formatting Views</td>
<td>19</td>
</tr>
<tr>
<td>Lesson Review Exercise</td>
<td>21</td>
</tr>
<tr>
<td>LESSON 2 CUSTOMIZING MENUS AND TOOLBARS</td>
<td>23</td>
</tr>
<tr>
<td>Customizing Toolbars</td>
<td>24</td>
</tr>
<tr>
<td>Customizing The Menu Bar</td>
<td>30</td>
</tr>
<tr>
<td>Creating a Custom Toolbar</td>
<td>32</td>
</tr>
<tr>
<td>Customizing The Quick Access Toolbar</td>
<td>34</td>
</tr>
<tr>
<td>Lesson Review Exercise</td>
<td>37</td>
</tr>
<tr>
<td>LESSON 3 CONFIGURING E-MAIL ACCOUNTS</td>
<td>39</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>----</td>
</tr>
<tr>
<td>Creating An E-mail Account</td>
<td>40</td>
</tr>
<tr>
<td>Managing E-mail Accounts</td>
<td>44</td>
</tr>
<tr>
<td>Lesson Review Exercise</td>
<td>50</td>
</tr>
</tbody>
</table>

**INDEPENDENT PRACTICE ACTIVITY** | 53 |

**UNIT 2 TRACKING ITEMS AND ACTIVITIES WITH THE JOURNAL** | 57 |

**LESSON 1 THE JOURNAL** | 59 |
| Using The Journal to Record Entries | 60 |
| Changing The Journal View And Timeline | 66 |
| Removing Entries And Closing The Journal | 70 |
| Lesson Review Exercise | 72 |

**INDEPENDENT PRACTICE ACTIVITY** | 75 |

**UNIT 3 USING RULES AND ALERTS** | 77 |

**LESSON 1 FILTERING E-MAIL USING RULES** | 79 |
| Creating A Rule From a Template | 80 |
| Creating A Rule From An E-mail | 84 |
| Managing Rules | 86 |
| Lesson Review Exercise | 90 |

**LESSON 2 OUT OF OFFICE ASSISTANT AND PUBLIC FOLDER RULES** | 93 |
| Out of Office Assistant Rules | 94 |
| Public Folder Rules | 98 |
| Lesson Review Exercise | 100 |

**LESSON 3 USING ALERTS** | 101 |
| Desktop Alerts | 102 |
| Desktop Alert Settings | 104 |
SharePoint Alerts ................................................................. 106
Lesson Review Exercise ....................................................... 110

INDEPENDENT PRACTICE ACTIVITY ................................... 111

UNIT 4 MANAGING JUNK E-MAIL ................................. 113

LESSON 1 INTRODUCING THE JUNK E-MAIL FILTER........... 115
  Junk Mail Filtering .......................................................... 116
  E-Mail Postmarking ....................................................... 120
  Lesson Review Exercise .................................................. 122

LESSON 2 CONTROLLING JUNK E-MAIL ......................... 123
  Configuring Protection .................................................... 124
  Filtering E-mail With Lists ............................................. 126
  Managing the Junk E-mail Folder ................................. 130
  Lesson Review Exercise .................................................. 132

INDEPENDENT PRACTICE ACTIVITY ............................... 135

UNIT 5 USING SHAREPOINT WITH OUTLOOK 2007 .... 137

LESSON 1 WORKING WITH SHAREPOINT FILES .......... 139
  Using SharePoint With Outlook ....................................... 140
  Opening SharePoint Files From Outlook ......................... 142
  Disconnecting Outlook From SharePoint ....................... 144
  Lesson Review Exercise .................................................. 145

LESSON 2 MANAGING SHAREPOINT TASKS AND CONTACTS 147
  Using Outlook to Manage SharePoint Tasks .................. 148
  Using Outlook to Add an Appointment to SharePoint .... 150
  Managing Your SharePoint Contacts in Outlook ............. 151
  Lesson Review Exercise .................................................. 153
INDEPENDENT PRACTICE ACTIVITY ........................................... 155

UNIT 6 USING GROUP SCHEDULES AND INTERNET CALENDARS ................................................................. 157

LESSON 1 CREATING AND USING A GROUP SCHEDULE .... 159
  Creating Group Schedules ................................................................. 160
  Customizing Group Schedules ......................................................... 162
  Sending a Group Schedule Meeting Request .............................. 164
  Lesson Review Exercise ................................................................. 166

LESSON 2 USING INTERNET CALENDARS ......................... 167
  Internet Calendars ........................................................................... 168
  Viewing Calendar Snapshots ......................................................... 169
  Subscribing to Internet Calendars .................................................. 171
  Publishing The Default Calendar ................................................... 172
  Publishing an Additional Calendar ................................................ 175
  Lesson Review Exercise ................................................................. 177

LESSON 3 SHARING THE CALENDAR ................................. 179
  Calendar Sharing ........................................................................... 180
  Opening a Shared Calendar ............................................................ 181
  Adding a Delegate .......................................................................... 182
  Lesson Review Exercise ................................................................. 186

INDEPENDENT PRACTICE ACTIVITY ........................................... 187

UNIT 7 CREATING CUSTOM FORMS ................................. 189

LESSON 1 INTRODUCTION TO FORMS ............................ 191
  Introduction To Forms ................................................................... 192
  Designing and Customizing Forms ............................................ 195
  Opening a Built-in Form ............................................................... 199
  Lesson Review Exercise ................................................................. 201
INTRODUCTION

In this introduction, you will find the following information:

- About this course
- Using this manual
- What you’ll find in each unit
- What you’ll find in each lesson
- How to use the student data files
- How to proceed
ABOUT THIS COURSE

Welcome to the Outlook 2007 Intermediate course. Upon completion of this course, you will be able to:

- Create and customize views
- Customize toolbars and the menu bar
- Create and manage e-mail accounts
- Use the Journal
- Create and manage rules
- Use Out of Office Assistant and Public Folder rules
- Configure desktop and SharePoint alerts
- Configure protection from Junk E-mail
- Use SharePoint with Outlook
- Use Outlook to manage SharePoint tasks and contacts
- Create and customize a group schedule
- Use and publish Internet calendars
- Design and customize forms
- Add fields and contacts to forms
- Configure form actions
- Publish a form to a library

USING THIS MANUAL

This course is delivered in a self-paced training environment. This method of delivery is designed to meet the varying needs and learning styles of adult learners.

The student course manual provided with the course is yours to keep. This manual will guide you through the course using a step-by-step approach. Because we believe that it is just as important for you to learn concepts as it is for you to learn procedures, each topic begins with a conceptual overview of the feature you are
learning. Then, details and procedures are presented in small, easy-to-absorb segments. People generally learn best by doing, so most of the course will consist of step-by-step exercises at the computer.

Our teaching philosophy is reflected in the way we organize the material in this manual. Following is an orientation to the manual’s structure.

- A Table of Contents followed by this introduction.
- An Index.

Each course is comprised of a number of units and lessons. The units group together the functions that comprise a given skill set that you will be learning in the course. Each lesson comprises the topics that describe how to perform these functions. We feel that the best approach to maximize your understanding of the concepts and proficiency in the skill sets is to break the material into manageable learning bites. This enables you to thoroughly understand a piece of information before moving on to the next.

You should strive to complete a lesson before ending your training session to maintain the continuity of the lesson. Ending a session in the middle of a lesson will cause an interruption in the presentation of the material.

**WHAT YOU’LL FIND IN EACH UNIT**

Units are the largest structural component of the course content. A unit begins with a title page that lists each lesson within the unit. Within each lesson there are multiple topics that contain conceptual and explanatory information. The conceptual information takes the form of text, exhibits, screen shots, lists, and tables.

Each topic ends with **Step-by-Step** exercises which enable you to practice what you’ve learned. Each lesson then ends with a **Lesson Review Exercise** which enables you to practice skills you have learned throughout the lesson. Finally, units conclude with an
**Independent Practice Activity** that gives you an opportunity to practice the collective skills you’ve learned in the entire unit.

### What You’ll Find in Each Lesson

<table>
<thead>
<tr>
<th>Lesson Objectives</th>
<th>This describes what tasks you will be able to perform by the end of the lesson.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Topics</td>
<td>For every objective, there is a corresponding topic.</td>
</tr>
<tr>
<td>Discussion</td>
<td>Every topic begins with explanatory text. The <strong>Discussions</strong> present the conceptual information such as when and why you might use the feature.</td>
</tr>
<tr>
<td>Notes</td>
<td>Notes provide additional information about a topic that is not necessary to complete the task. Notes may include alternative methods for accomplishing the task, such as keyboard shortcuts, or helpful tips about the task.</td>
</tr>
<tr>
<td>Warnings</td>
<td><strong>Warnings</strong> are used to alert you to actions that may adversely affect the application or current file.</td>
</tr>
<tr>
<td>Procedures</td>
<td>The <strong>Discussion</strong> (and any <strong>Notes</strong> and <strong>Warnings</strong>) is followed by a <strong>Procedure</strong> that presents general steps to accomplish a task. This information can be used for future reference back at your workplace to assist you to complete similar tasks using the application. The steps in these procedures are to be used for reference only and are not to be carried out during your lesson.</td>
</tr>
<tr>
<td>Step-by-Step</td>
<td>A <strong>Step-by-Step</strong> exercise follows each topic to enable you to practice what you have learned in a practical setting using scenarios and data. You will open files that have been supplied with the course and save files you might create during the course.</td>
</tr>
</tbody>
</table>
Each lesson ends with a **Lesson Review Exercise**, and each unit ends with an **Independent Practice Activity**. These exercises pool the concepts and procedures taught during the lesson or unit, allowing you to reinforce the skills you have learned and assimilate the concepts into a cohesive whole.

---

**HOW TO USE THE STUDENT DATA FILES**

Many of the step-by-step and review exercises require that you open files that have been created for the exercises. These files are provided for you in a folder called **Student Data Folder**.

After you open a file, you might be instructed to make changes to the file. As you work with the file, you will be instructed to save the modified file using a different name. In doing so, if you make a mistake, you can simply retrieve the original file from the **Student Data Folder** and try again.

Note that when you are ending your session for the day, you should save your work and exit the application in which you are working. If you are proceeding on to the next lesson you may remain in the application.

---

**HOW TO PROCEED**

Now that you understand the components that make up a lesson, you should proceed as follows:

- Start by reviewing the title pages of the first unit and lesson, paying particular attention to the **Lesson Objectives**. The objectives provide you with an overview of the skills you will learn during the first lesson.

- Next, go through the corresponding topics for that lesson in the media-based program.

- As you go through the program, follow along by reading the **Discussions** (and any **Notes** and **Warnings**) for the topic to gain an understanding of the topic and its application. Also review the **Procedures** used to apply the feature.
• Complete the **Step-by-Step Exercise** for the first topic. This will provide you with hands-on experience in the application you are learning. Make sure that you observe what is happening on your screen as you complete the steps.

• Repeat the process for the remaining topics until you complete the topics in the first lesson.

• Complete the **Lesson Review Exercise** at the end of the lesson.

• Repeat the process for the remaining lessons until you complete the unit. Upon completion of the unit, take the media-based **Post Assessment**. Use this to check your proficiency using the skills learned in the course, and to identify areas that require additional review and practice.

• Upon completion of the Post Assessment, complete the **Independent Practice Activity** in your manual. This will further check your proficiency in a hands-on environment in the application you are learning.

    **Enjoy your course!**
MICROSOFT CERTIFIED APPLICATION SPECIALIST (MCAS)

A Microsoft Certified Application Specialist is an individual who has passed exams for certifying his or her skills in one or more of the Microsoft Office desktop applications. Upon completion of this courseware, you may be prepared to take exam number 77-604: Using Microsoft Office Outlook.

To obtain Microsoft Certified Application Specialist (MCAS) certification, you must obtain certification in Microsoft Word 2007, Microsoft Excel 2007, Microsoft PowerPoint 2007, or Microsoft Outlook 2007.

HOW THIS COURSE CAN HELP YOU PREPARE

The Outlook 2007 Basic, Outlook 2007 Intermediate, and Outlook 2007 Advanced courses are designed to prepare you for the Microsoft Outlook 2007 (77-604) exam.

EXAM REQUIREMENTS

The chart on the next page summarizes the topics you will need to master to pass the Microsoft Outlook 2007 (77-604) exam. Topics that are covered in this Outlook 2007 Intermediate course are bolded. The remaining topics are covered in Outlook 2007 Basic and Outlook 2007 Advanced.
<table>
<thead>
<tr>
<th>Skill Sets</th>
<th>Exam Skill Standards</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managing Messaging</td>
<td>• Create and send an e-mail message</td>
</tr>
<tr>
<td></td>
<td>• Create and manage your signature and automated messages</td>
</tr>
<tr>
<td></td>
<td>• Manage e-mail message attachments</td>
</tr>
<tr>
<td></td>
<td>• Configure e-mail message sensitivity and importance settings</td>
</tr>
<tr>
<td></td>
<td>• Configure e-mail message security settings</td>
</tr>
<tr>
<td></td>
<td>• Configure e-mail message delivery options</td>
</tr>
<tr>
<td></td>
<td>• View e-mail messages</td>
</tr>
<tr>
<td>Managing Scheduling</td>
<td>• Create appointments, meetings, and events</td>
</tr>
<tr>
<td></td>
<td>• Send meeting requests</td>
</tr>
<tr>
<td></td>
<td>• Update, cancel, and respond to meeting requests</td>
</tr>
<tr>
<td></td>
<td>• Customize calendar settings</td>
</tr>
<tr>
<td></td>
<td>• <strong>Share your calendar with others</strong></td>
</tr>
<tr>
<td></td>
<td>• <strong>View other calendars</strong></td>
</tr>
<tr>
<td>Managing Tasks</td>
<td>• Create, modify, and mark tasks as complete</td>
</tr>
<tr>
<td></td>
<td>• Accept, decline, assign, update, and respond to tasks</td>
</tr>
<tr>
<td>Managing Contacts and Personal Contact Information</td>
<td>• Create and modify contacts</td>
</tr>
<tr>
<td></td>
<td>• Edit and use an electronic business card</td>
</tr>
<tr>
<td></td>
<td>• Create and modify distribution lists</td>
</tr>
<tr>
<td></td>
<td>• Create a secondary address book</td>
</tr>
<tr>
<td>Organizing Information</td>
<td>• Categorize Office Outlook 2007 items by color</td>
</tr>
<tr>
<td></td>
<td>• Create and manage Office Outlook 2007 data files</td>
</tr>
<tr>
<td></td>
<td>• Organize mail folders</td>
</tr>
<tr>
<td></td>
<td>• Locate Office Outlook 2007 items by using Search</td>
</tr>
<tr>
<td></td>
<td>• <strong>Create, modify, and remove rules to manage e-mail messages</strong></td>
</tr>
<tr>
<td></td>
<td>• <strong>Customize your Office Outlook 2007 experience</strong></td>
</tr>
</tbody>
</table>
UNIT 1
CUSTOMIZING OUTLOOK 2007

The following lessons are contained in Unit 1:

Lesson 1  Customizing Views
Lesson 2  Customizing Menus and Toolbars
Lesson 3  Configuring E-mail Accounts
LESSON 1
CUSTOMIZING VIEWS

In this lesson, you will learn how to:

- Learn about views
- Create views
- Customize fields for views
- Customize groups and filtered views
- Customize automatic formatting views
Introduction to Views

Discussion

A view is a specific layout in Outlook. For example, the Inbox folder displays its messages in a view, providing the subject, sender, date, and size of the messages.

Views in Outlook 2007 determine the arrangement and layout of items in a folder.

Outlook provides a number of default views for different types of folders. These views are dynamic, and change according to the folder that is open at the time.

You can customize these views to display your data in a different way or to display only data that meets certain criteria.

Views only change the way information looks – you can't use views to modify data in a folder.

Examples of alternate views

The various folders each display a different view.
Examples of Views by Folder

<table>
<thead>
<tr>
<th>Folder</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mail</td>
<td>The Mail folder contains a Message Timeline view, which enables you to keep track of your messages day by day. This view displays the current month at the top of the screen and the dates below it. Each message is placed under the relevant date.</td>
</tr>
<tr>
<td>Calendar</td>
<td>The Calendar folder contains a Day/Week/Month view, which enables you to easily move between different views such as day, week, or month. This view displays a monthly calendar, as well as day, week, and month buttons.</td>
</tr>
<tr>
<td>Contacts</td>
<td>The Contacts folder contains an Address Cards view, which enables you to view a particular contact's details on a thumbnail. This view displays the contacts name and e-mail address.</td>
</tr>
<tr>
<td>Tasks</td>
<td>The Tasks folder contains a Simple List view, which enables you to view certain information about a particular task such as its subject and its due date. This view displays the subject and due date in two separate columns.</td>
</tr>
<tr>
<td>Notes</td>
<td>The Notes folder contains an Icons view, which enables you to view all notes that you made as Icons. Other views include Notes List, Last Seven Days, By Category, and Outlook Data Files.</td>
</tr>
</tbody>
</table>

You can alter a number of the settings that views are composed of to give you different ways to look at items in a folder. These include:
### View Settings

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>View Types</strong></td>
<td>A view type is the basic structure of a view. This determines how information is arranged and formatted in a folder. The view types that are available for a particular folder – table, timeline, day/week/month, card, or icon – depend on the Outlook items that are stored in that folder.</td>
</tr>
<tr>
<td><strong>Fields</strong></td>
<td>A field is an element of a table that contains a particular item of information, such as a title or last name.</td>
</tr>
<tr>
<td><strong>Colors</strong></td>
<td>You can change the color of a number of elements of a view, such as the text, flags, and appointments and meetings.</td>
</tr>
<tr>
<td><strong>Fonts</strong></td>
<td>You can change the default fonts when customizing a view. For example, by default, new e-mail messages appear in bold in your Inbox, but you can create a rule to have the text simply appear in a bigger font size</td>
</tr>
</tbody>
</table>

### Procedures

*There are no procedures for this topic.*

### Step-by-Step

*There are no step-by-step exercises for this topic.*
CREATING VIEWS

Discussion

In Outlook 2007, you can create a new view from scratch or you can create a view based on an existing view.

The Custom View Organizer

You use the Can be used on section to change where the view will be available. You can make it available to everyone in your organization, to you only, or to all the Mail and Post folders.

The Create a New View dialog box
In the **Customize View** dialog box you can see the current settings for your view, which by default has the view settings for the view type you selected because this is what the new view is based on.

![Customize View dialog box]

In addition to creating new views, you can also rename, copy, and delete existing views.

![Copy View dialog box]

Click **Modify** to change an existing view rather than create a new one. Click **Reset** to change the view back to its original settings before you modified it.

### Procedures

*To create a new view from scratch*

- Select **View, Current View, Define Views**.
- Click the **New** button.
• In the **Create a New View** dialog box, specify a name for your new view, select the view type that you want, and choose who can use the view.

• Click **OK**.

• In the **Customize View** dialog box, change settings as desired and click **OK**.

• To use the new view immediately, click **Apply View**. Otherwise, click **Close**.

**To rename a view**

• Select View, Current View, Define Views.

• Select the view you want to rename.

• Click the **Rename** button.

• In the **Rename View** dialog box, type the new name and click **OK**.

• To use the view immediately, click **Apply View**. Otherwise, click **Close**.

**To copy a view**

• Select View, Current View, Define Views.

• Select the view you want to copy.

• Click the **Copy** button.

• In the **Copy View** dialog box, specify a name for your new view and choose who can use the view.

• In the **Customize View** dialog box, change settings as desired and click **OK**.

• To use the new view immediately, click **Apply View**. Otherwise, click **Close**.

**To delete a view**

• Select View, Current View, Define Views.

• Select the view you want to delete.

• Click the **Delete** button.

• Click **OK** to confirm and click **Close**.
Step-by-Step

Objective: To create, rename, copy, and delete views.

Before you begin: Start Outlook 2007 and go to the Inbox.

1. Click View, Current View, Define Views.
   The Custom View Organizer dialog box appears.

2. Click the New button.
   The Create a New View dialog box appears.

3. In the Name of new view text box, type My First View.
   The text appears.

4. In the Type of view list, choose Table.
   The option is selected.

5. In the Can be used on section, choose This folder, visible only to me.
   The option is selected.

6. Click OK.
   The Customize View: My First View dialog box appears.

7. In the Customize View: My First View dialog box, click OK.
   The Custom View Organizer dialog box reappears with the new view selected.

8. With My First View selected, click Copy.
   The Copy View dialog box appears.

9. In the Name of new view text box, type My Next View and click OK.
   The Customize View: My Next View dialog box appears.

10. In the Customize View: My Next View dialog box, click OK.
    The Custom View Organizer dialog box reappears with the new view selected.

11. With My Next View selected, click Rename.
    The Rename View dialog box appears.
12. In the **Name of new view** dialog box, type **My Second View** and click **OK**.
   *The view is renamed.*

13. With **My Second View** selected, click **Delete**.
   *A confirmation dialog box appears.*

14. Click **OK**.
   *The view is deleted.*

✓ **Before you move on:** Click **Close** to close the dialog box.

---

**CUSTOMIZING FIELDS FOR VIEWS**

### Discussion

You can customize views to add and remove fields from a view. Fields are also known as *columns*.

The typical Outlook Mail view has a number of columns.

- Importance
- Reminder
- Icon
- Attachment
- From and Subject
- Received and Size
- Categories and Flag Status

You can add fields to the views by:

- Using the **Field Chooser** dialog box
- Using the **Customize View** dialog box

The **Field Chooser** dialog box presents a list of available fields that you can use to view information about a message.

Using the **Customize View** dialog box, you can customize the fields that are visible in the view by changing the font, formatting, and field groupings.
The Field Chooser dialog box

The Customize View dialog box contains several buttons that you can use to modify a view.

<table>
<thead>
<tr>
<th>Customize View Buttons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fields</strong></td>
<td>You use the <strong>Fields</strong> button to add or remove fields from a view, or to change the order in which they display.</td>
</tr>
<tr>
<td><strong>Group By</strong></td>
<td>The <strong>Group By</strong> button allows you to group items based on up to four different fields, in ascending or descending order. This option is only available in the Mail and Tasks folders.</td>
</tr>
<tr>
<td><strong>Sort</strong></td>
<td>You use the <strong>Sort</strong> button to sort items in ascending or descending order, based on up to four different fields. This option is not available in the <strong>Calendar</strong> folder.</td>
</tr>
<tr>
<td><strong>Filter</strong></td>
<td>You use the <strong>Filter</strong> button to apply a filter to your view so that it only displays those items that meet conditions you specify. For example, you can specify that the Inbox should only display unread messages. The other items in the folder will not be deleted – to see them again, you simply remove the filter.</td>
</tr>
</tbody>
</table>
Customize View Buttons

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Settings</td>
<td>You use the Other Settings button to view and customize fonts for columns and rows, and for other Table view settings.</td>
</tr>
<tr>
<td>Automatic Formatting</td>
<td>The Automatic Formatting button enables you to configure default formatting settings for items that meet a specified condition. For example, you can format overdue items in a different font and color than unread items.</td>
</tr>
<tr>
<td>Format Columns</td>
<td>You use the Format Columns button to specify the display format for each field. This option is only available in the Mail and Tasks folders.</td>
</tr>
</tbody>
</table>

The Show Fields dialog box lists the available fields.

The fields are arranged in different field sets, which you can specify. By default, the dialog box displays the most frequently-used fields.

You can also remove a field by dragging it off of the field header section and letting go when you see a large X.
Procedures

To add a field to a view using the Field Chooser
- Right-click anywhere in the field header section.
- Click Field Chooser from the shortcut menu.
- Click the field you want to add.
- Drag the field to the position in the field headers where you want the new field to appear.

To remove a field from the header
- Right-click the field you want to remove.
- Click Remove This Column from the shortcut menu.

To add a field using the Customize View dialog box
- Click View, Current View, Customize Current View.
- Click the Fields button.
- In the Available Fields list, click the field you want to add.
- Click Add.
- Click Move Up or Move Down buttons to change the field’s position, if necessary.
- Click OK twice.

Step-by-Step

Objective: To add and remove fields using the Field Chooser and Customize View dialog boxes.

Before you begin: Choose View, Current View, My First View to select the view you created in the last exercise. Choose View, Reading Pane, Off to switch the Inbox to a table format.

1. Right-click anywhere in the field header section.
   The shortcut menu appears.

2. Click Field Chooser from the shortcut menu.
   The Field Chooser dialog box appears.
3. Click the **Created** field.
The field is highlighted in the **Field Chooser** dialog box.

4. Drag the **Created** field between the **Subject** and **Received** fields, and let go when you see a red arrow pointing between the two fields.
The **Created** field appears between the **Subject** and **Received** fields.

5. Click the X in the top-right corner of the **Field Chooser**.
The **Field Chooser** dialog box closes.

6. Click View, Current View, Customize Current View.
The **Customize View** dialog box appears.

7. Click the **Fields** button.
The **Show Fields** dialog box appears.

8. In the Available fields list, click the **Cc** field.
The field is highlighted.

9. Click the **Add** button.
The field is added to the **Show these fields in this order** list.

10. Click the **Move Up** button several times so the field is positioned beneath the **From** field.
The field is positioned beneath the **From** field.

11. Click **OK** twice.
The **Cc** field appears to the right of the **From** field.

12. Right-click the **Created** field and choose **Remove This Column**.
The column is removed from the view.

✓ **Before you move on**: Right-click the **Cc** field and choose **Remove This Field**.
CUSTOMIZING GROUPS AND FILTERED VIEWS

Discussion

You can keep related information together in a view by grouping items.

Once you've specified the primary grouping, you can specify the sub-groups. There are three "Then by" drop-down lists, each specifying a successively lower grouping priority.

You can use the Ascending and Descending options for each field to group items starting from the first letter of the alphabet, the lowest number, or the earliest date.

The Filter dialog box lets you specify the criteria by which you want to filter your view. For example, you can display only messages containing specified text in the subject or message body.

You can uncheck Show field in view in the Group By dialog box to prevent the field you are grouping by from appearing in the table. This can be useful because the field title will always appear in the group header.
Procedures

To group items

- Click View, Current View, Customize Current View.
- Click the Group By button.
- Deselect the Automatically group according to arrangement check box.
- Click the Group items by drop-down list.
- Choose the field you want to group by.
- If necessary, change Ascending to Descending.
- If necessary, uncheck the Show field in view check box.
- Repeat these steps for any Then by options you need to add.
- Click OK and OK.

To filter the view so it displays only messages containing specified text

- Click View, Current View, Customize Current View.
- Click the Filter button.
- In the Search for the word(s) text box, type the text you want to filter for.
- In the In drop-down list, choose the fields where the text should appear (subject field only, subject field and message body, or frequently-used text fields).
- Click OK twice.

Step-by-Step

- **Objective:** Group and filter items.
- **Before you begin:** Complete the previous exercises.

  1. Click View, Current View, Customize Current View.  
     The Customize View dialog box appears.
2. Click the **Group By** button.  
   *The Group By dialog box appears.*

3. Deselect the **Automatically group according to arrangement** check box.  
   *The box is unchecked and other options become available.*

4. Click the **Group items by** drop-down list.  
   *The list of fields appears.*

5. Click **Attachment**.  
   *The Attachment field appears in the list and additional options become available.*

6. Click the **Then by** drop-down list.  
   *The list of fields appears.*

7. Scroll down and click the **From** field.  
   *The From field appears in the list and additional options become available.*

8. Click the **Descending** button next to the **From** field.  
   *The option is selected.*

9. Click **OK** and then **OK** again.  
   *The list appears grouped first by the Attachment field and then by the From field.*

10. Click **View**, **Current View**, **Customize Current View**.  
    *The Customize View dialog box appears.*

11. Click the **Filter** button.  
    *The Filter dialog box appears.*

12. In the **Search for the word(s)** text box, type **Goods**.  
    *The text appears.*

13. Leave other options at their default settings and click **OK** twice.  
    *The emails disappear and only one category remains, **With Attachments**. The category is collapsed.*

   ✓ **Before you move on:** Click the + next to **Attachment: With Attachments** and then again next to **From: (none)**. The two emails with the word **Goods** in the subject appear.
CUSTOMIZING AUTOMATIC FORMATTING VIEWS

Discussion

You can change the font and other elements in a view by customizing the automatic formatting settings.

In the Automatic Formatting dialog box, the Rules for this view list box contains specific conditions for the items in your view.

For each of these conditions, you can specify a particular font to be used for displaying items that meet that condition.

![Automatic Formatting dialog box]

You can click the Add button to add a new rule.

Procedures

To customize automatic formatting views

- Click View, Current View, Customize Current View.
- Click the Automatic Formatting button.
- Select the condition you want to customize.
- Click the Font button.
- Enter the desired font settings and click OK three times.
Objective: Customize the font of an automatic view.

Before you begin: Right-click each of the emails in the current view and choose Mark as Unread.

1. Click View, Current View, Customize Current View.  
The Customize View dialog box appears.

2. Click the Automatic Formatting button.  
The Automatic Formatting dialog box appears.

3. Click Unread messages (NOTE: do not click the check box).  
The rule is highlighted.

4. Click the Font button.  
The Font dialog box appears.

5. In the Font Style list, click Bold Italic.  
The option is selected.

6. Click OK three times.  
The unread messages appear in Bold Italic format instead of Bold.

Before you move on: Right-click each of the emails in the current view and click Mark as Read.

Click View, Current View, Messages. The default view reappears.

Click View, Current View, Define Views. Click My First View. Click Delete and confirm the deletion.

Exit Outlook 2007.
LESSON REVIEW EXERCISE

Task

☐ Objective: To create, rename, copy, and delete views, add and remove fields, group and filter items, and customize the font of an automatic view.

✓ Before you begin: Start Outlook 2007 and go to the Inbox.

1. Create a new view called My Practice View. It should be a Table view and should be usable on all Mail and Post folders. Don’t customize the view at this time.

2. Copy the view and call the new copy My Practice View 2.

3. Rename the first view you created My Practice View 1.

4. Apply the My Practice View 1 view (NOTE: no changes will occur at this time).

5. Turn the Reading Pane off.

6. Using the Field Chooser, drag the Message field between the Subject and Received fields.

7. Using the Customize Fields dialog box, add the Read field and move it above the Categories field.

8. Group the list by the From field in ascending order.

9. Filter the list by the word conference in either the subject or body of the e-mail. Expand each of the categories.

10. Mark one email from Coup Degras and one email from Sally Smith as unread.

11. Customize the automatic formatting of Unread group headers by making the font size 12 points. Your screen should look like the image on the next page.
Before you move on: Mark the two emails that you marked unread as read again.

Remove the Message field from the header.

Change the view back to Messages view. If necessary, turn the Reading Pane back on (choose Right).

Delete the My Practice View 1 and My Practice View 2 views.

Exit Outlook 2007.
NOTICES

COPYRIGHT

Copyright 2009 by Career Tech Services. All rights reserved. Information in this document is subject to change without notice and does not represent a commitment on the part of Career Tech Services.

TRADEMARK NOTICES

All product names and services identified throughout this book are trademarks or registered trademarks of their respective companies. They are used throughout this book in editorial fashion only and for the benefit of such companies. No such use, or the use of any trade name, is intended to convey endorsement or other affiliation with the book.

DISCLAIMER

While Career Tech Services takes great care to ensure the accuracy and quality of these materials, all material is provided without any warranty whatsoever, including, but not limited to, the implied warranties of merchantability or fitness for a particular purpose.