

Microsoft Outlook 2013

Lesson 5

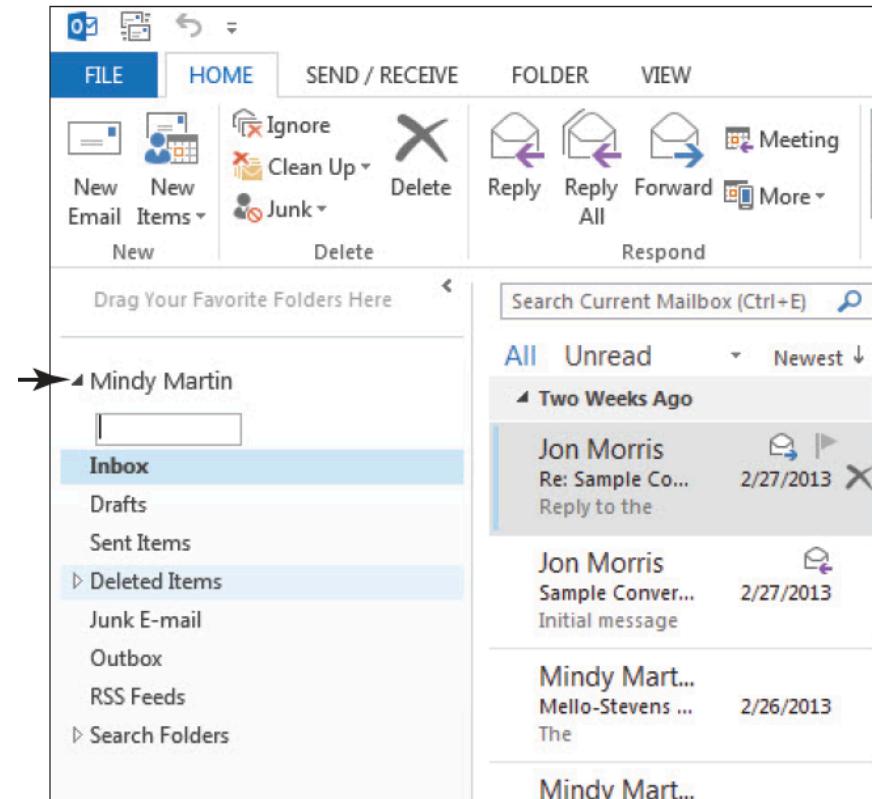
Automating Message Processing

Objectives

Skills	Exam Objective	Objective Number
Creating and Running Rules	Create and manage rules	1.2.4
Managing Rules	Create and manage rules	1.2.4
Working with Automated Microsoft Exchange Tools	Create auto-replies Delegate access	1.2.5 2.1.13
Using Quick Steps	Apply Quick Steps	1.2.3

Step by Step: Creating a Rule Using the Rules Wizard

- **GET READY. LAUNCH**
Outlook if it is not already running.
 1. If necessary, click the **Mail** button in the Navigation bar to display the mailbox. If necessary, click **Inbox** in the Folders List to display your standard mailbox.
 2. Right-click **Outlook Data Files** in the Folders List, and click **New Folder** in the shortcut menu. A small box appears at the top of the Folders List, as shown at right.

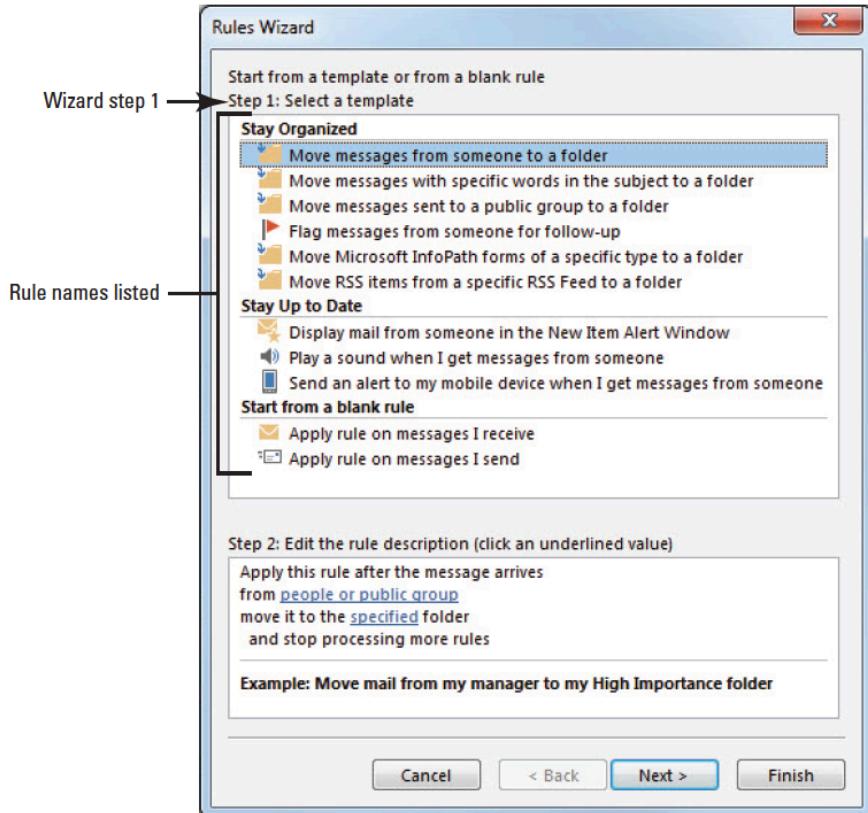


Step by Step: Creating a Rule Using the Rules Wizard

3. In the box, key **Lesson 5 Schedules** [Press **Enter**]. You will create a rule to move messages into this folder.
4. Click the **FILE** tab. In Backstage view, click the **Manage Rules & Alerts** option. The Rules and Alerts dialog box is displayed.

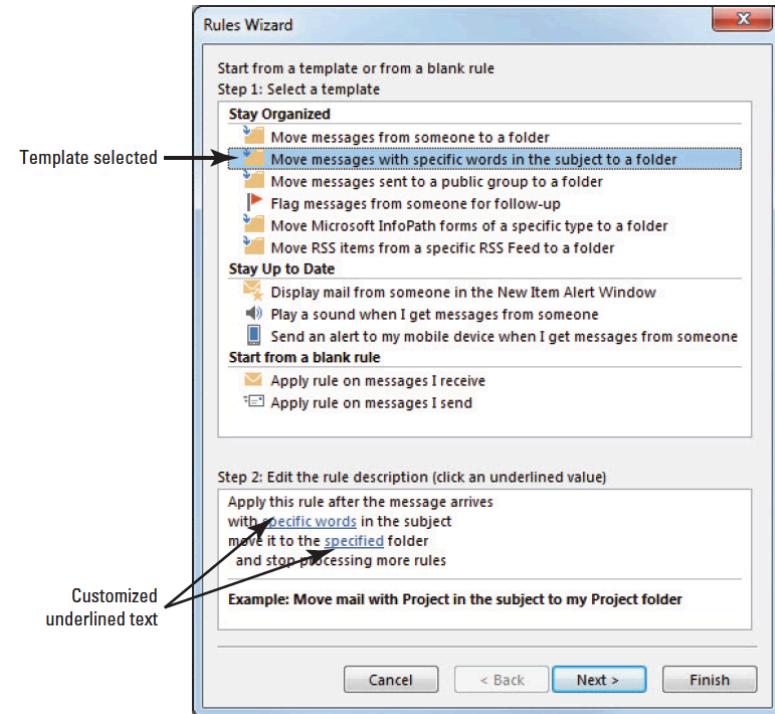
Step by Step: Creating a Rule Using the Rules Wizard

- Click the **New Rule** button. The Rules Wizard dialog box is displayed, as shown at right. Step 1 of this wizard involves choosing a template or blank rule.



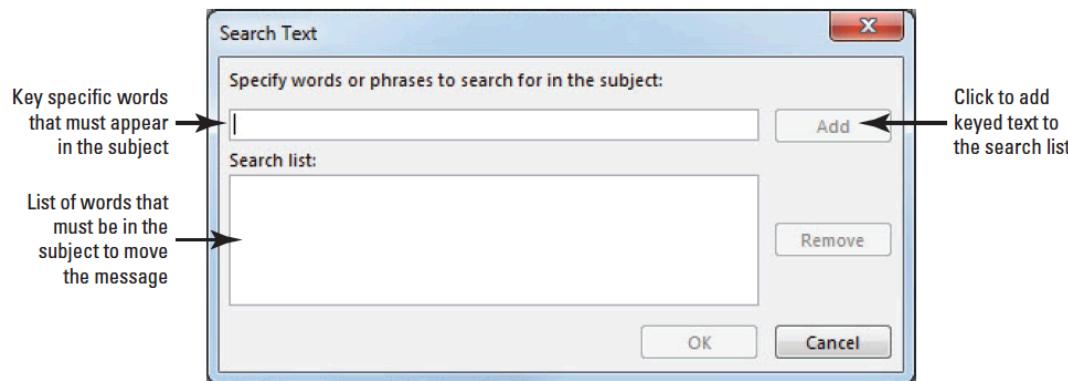
Step by Step: Creating a Rule Using the Rules Wizard

6. In Step 1: Select a template, select **Move messages with specific words in the subject to a folder** in the Stay Organized category templates list. This rule will move messages about the selected topic. The rule description in the lower area of the dialog box changes, as shown at right.



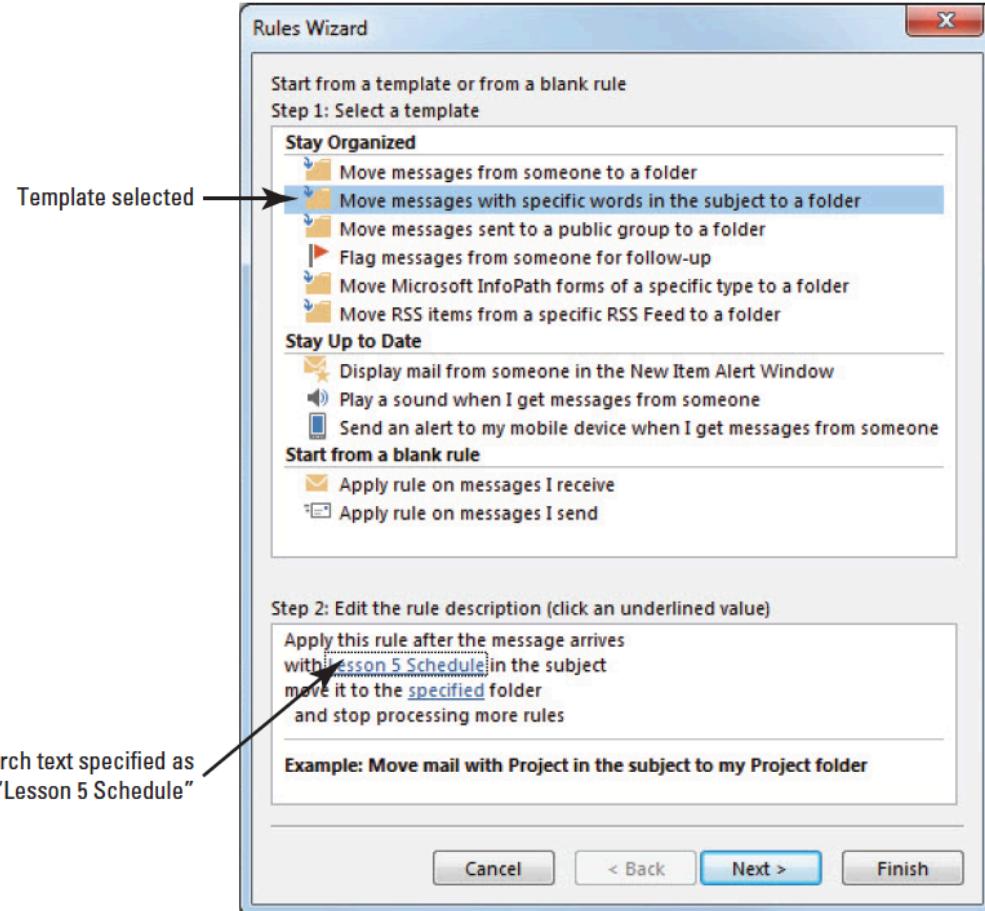
Step by Step: Creating a Rule Using the Rules Wizard

7. In the *Step 2: Edit the rule description* area, click **specific words**. The Search Text dialog box is displayed, as shown below.
8. In the *Specify words or phrases to search for in the subject* field, key **Lesson 5 Schedule**. Click the **Add** button. The Lesson 5 Schedule phrase is enclosed by quotation marks and added to the search list for this rule.



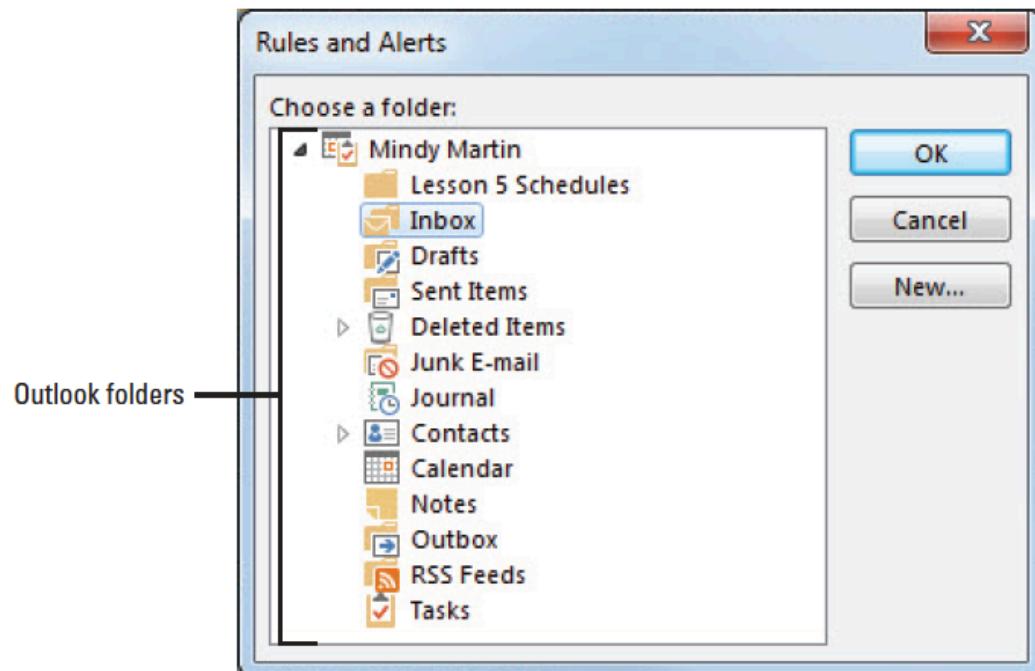
Step by Step: Creating a Rule Using the Rules Wizard

- Click OK to close the Search Text dialog box. The Rules Wizard dialog box is displayed. The **Lesson 5 Schedule** search phrase is identified, as shown at right.



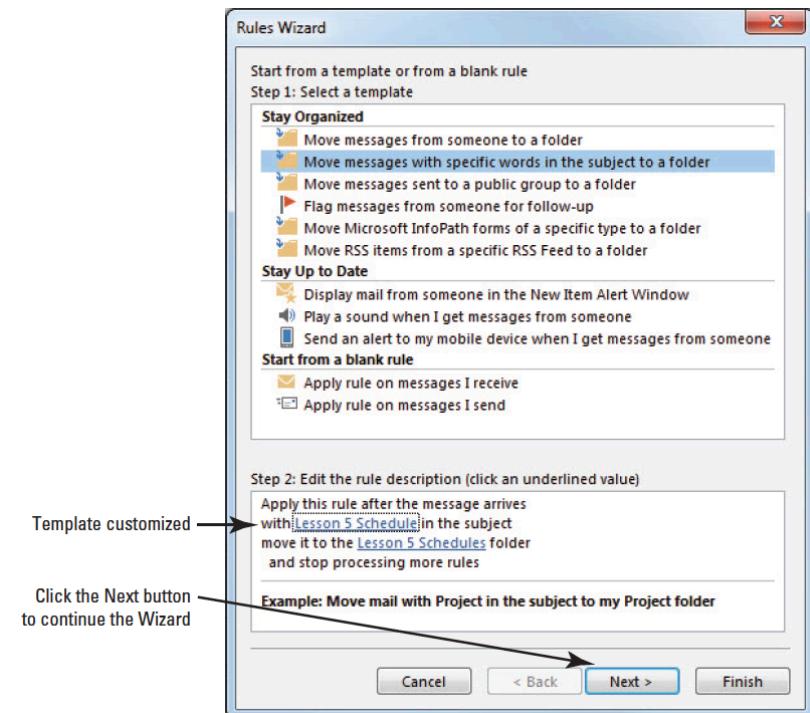
Step by Step: Creating a Rule Using the Rules Wizard

10. In the Step 2 area of the Rules Wizard dialog box, click **specified** to identify the destination folder. The Folders List is displayed in the Rules and Alerts dialog box, as shown at right.



Step by Step: Creating a Rule Using the Rules Wizard

11. Click the **Lesson 5 Schedules** folder in the **Choose a Folder** list, and click **OK**. The specified destination folder is identified in the Rules Wizard dialog box, as shown in Figure 5-8.

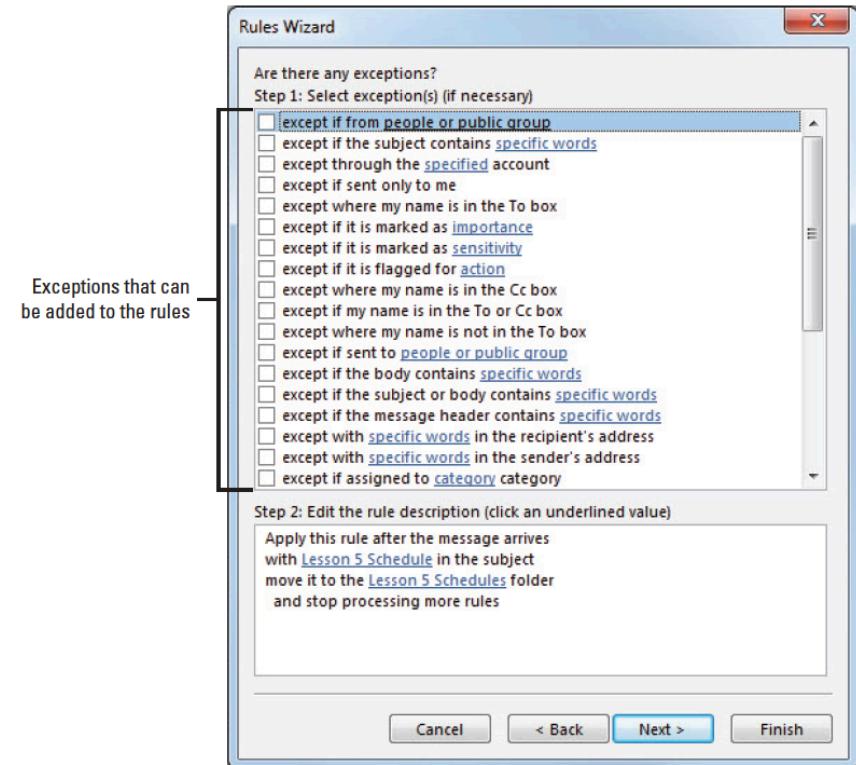


Step by Step: Creating a Rule Using the Rules Wizard

12. Click the **Next** button to continue. The next page of the Rules Wizard displays a number of conditions that you can add to the rule.
13. Click the **Next** button because you don't need to add any more conditions to this rule. The third wizard page is displayed. Under *Step 1: Select action(s)*, you will see a list of actions that can be taken if the conditions selected on the previous wizard page are met.

Step by Step: Creating a Rule Using the Rules Wizard

14. Click the **Next** button to continue to the next page of the wizard. Because you didn't select any special conditions on the previous wizard page, you don't want to add actions to this rule. A list of exceptions to the rule is displayed, as shown at right.

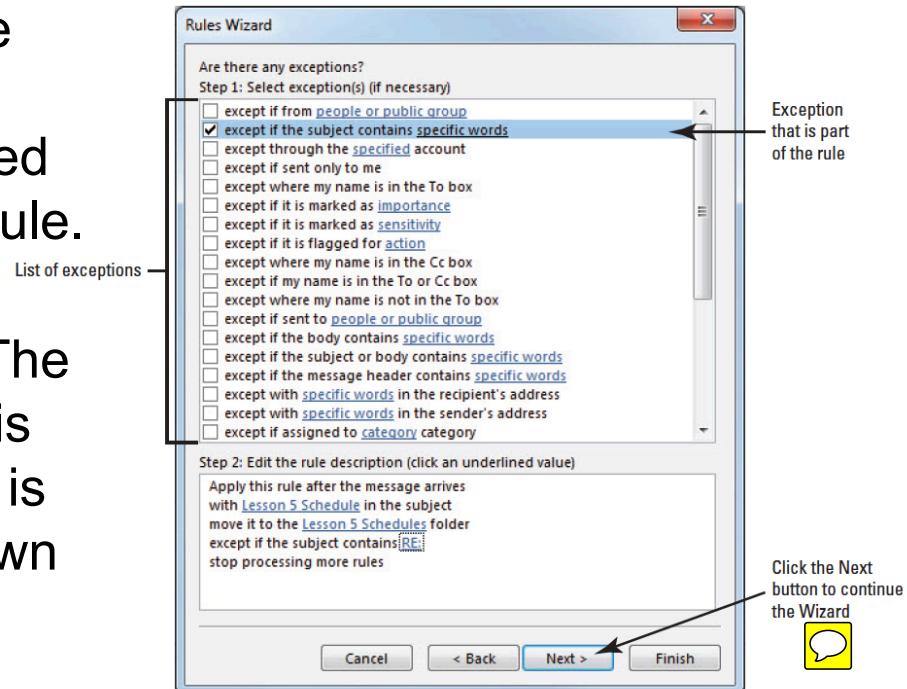


Step by Step: Creating a Rule Using the Rules Wizard

15. Click the second check box on the list: **except if the subject contains specific words**. Text is added to the rule description at the bottom of the Rules Wizard dialog box.
16. In the rule description area at the bottom of the dialog box, click **specific words**. The Search Text dialog box is displayed.
17. In the *Specify words or phrases to search for in the subject field*, key **RE:**. Making RE: an exception prevents replies to the Lesson 5 Schedule messages from being moved to the destination folder.

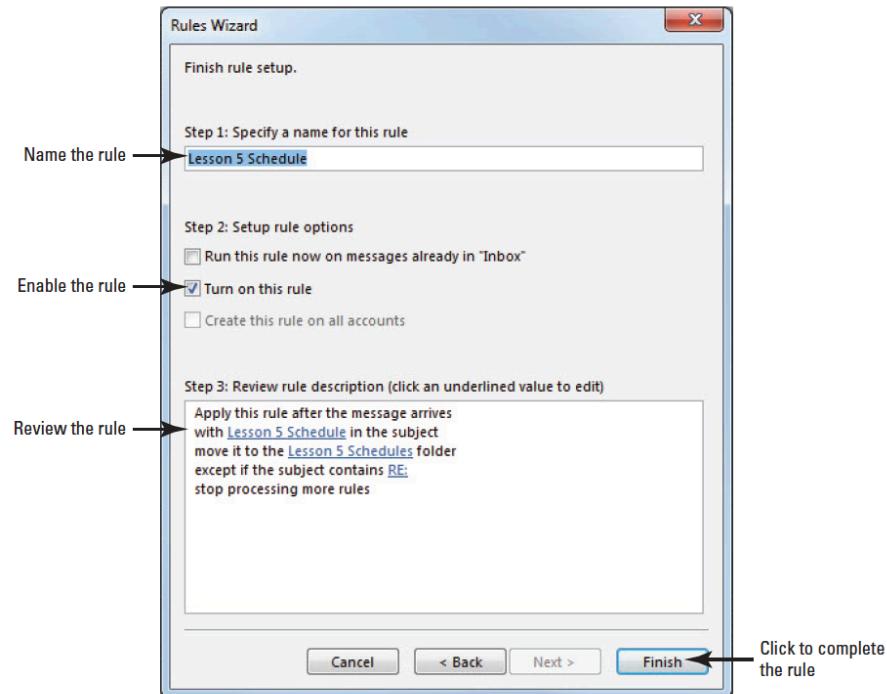
Step by Step: Creating a Rule Using the Rules Wizard

18. Click the **Add** button. The **RE:** text is enclosed by quotation marks and added to the search list for this rule.
19. Click **OK** to close the Search Text dialog box. The Rules Wizard dialog box is displayed. The exception is added to the rule, as shown at right.



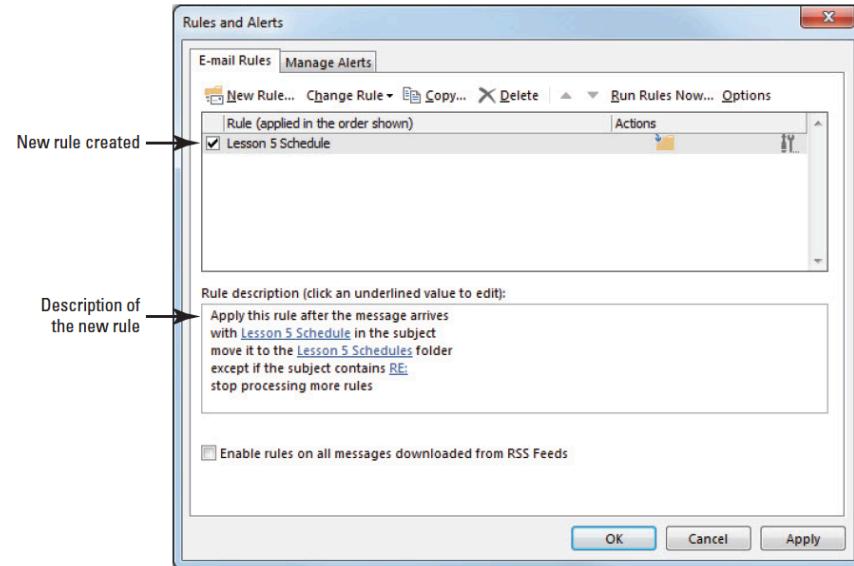
Step by Step: Creating a Rule Using the Rules Wizard

- Click the **Next** button to continue the Wizard. The rule is displayed for your approval, as shown at right. Examine the rule carefully to verify that it is correct.



Step by Step: Creating a Rule Using the Rules Wizard

21. Click the **Finish** button. The new rule is displayed in the Rules and Alerts dialog box, as shown at right.
 22. Click the **OK** button to close the Rules and Alerts dialog box.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

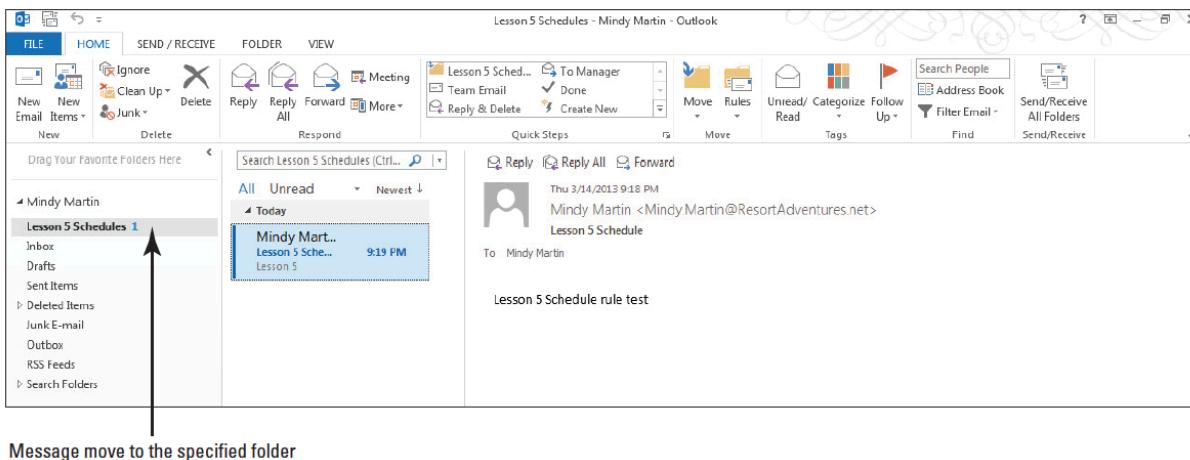


Step by Step: Test a Rule

- **GET READY.** Before you begin these steps, be sure to complete the previous exercise  creating a rule.
 1. Click the **New Email** button on the HOME tab. The Message window is displayed.
 2. In the **To** field, key **[your email address]**.
 3. In the **Subject** field, key **Lesson 5 Schedule**. When this message arrives, it will meet the condition defined in the Lesson 5 Schedule rule.
 4. In the message area, key **Lesson 5 Schedule rule test**.
 5. Click the **Send** button. The message is moved to the Outbox and sent when the computer is connected to the Internet.

Step by Step: Test a Rule

6. Click the **Lesson 5 Schedules** folder. If necessary, click the **Send/Receive All Folders** button to receive the message. When the message arrives, the rule runs automatically and places the message in the Lesson 5 Schedules folder, as shown below.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

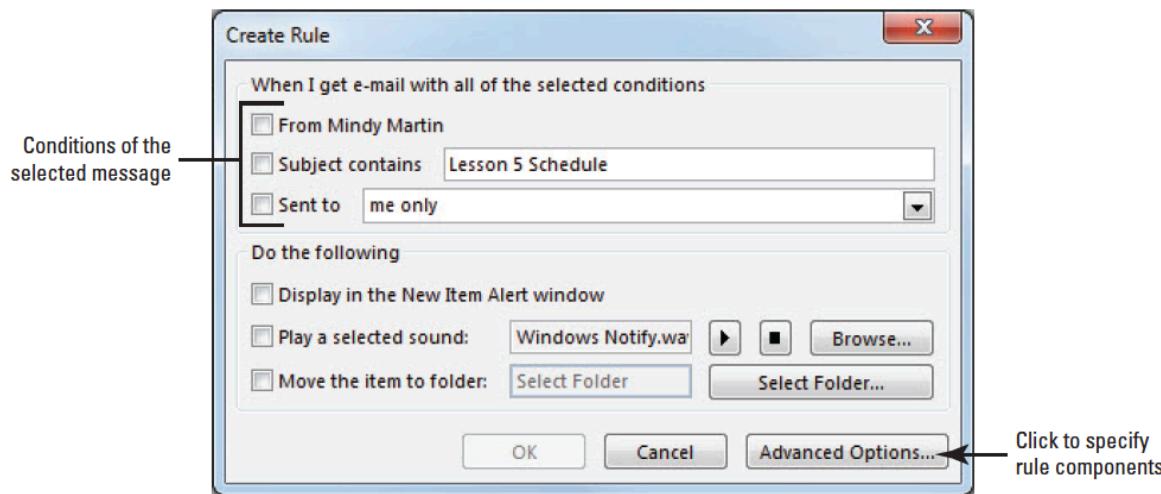


Step by Step: Create a Rule from a Selected Message

- **USE** the message you sent in the previous exercise.
 1. If necessary, click the **Mail** button in the Navigation bar to display the mailbox.
 2. In the Folders List, click the **Lesson 5 Schedules** folder. One message is highlighted in the Message List.

Step by Step: Create a Rule from a Selected Message

3. Right-click the message. Click on **Rules**, and select **Create Rule** on the shortcut menu. The Create Rule dialog box is displayed, as shown below. The conditions of the selected message are displayed in the dialog box.

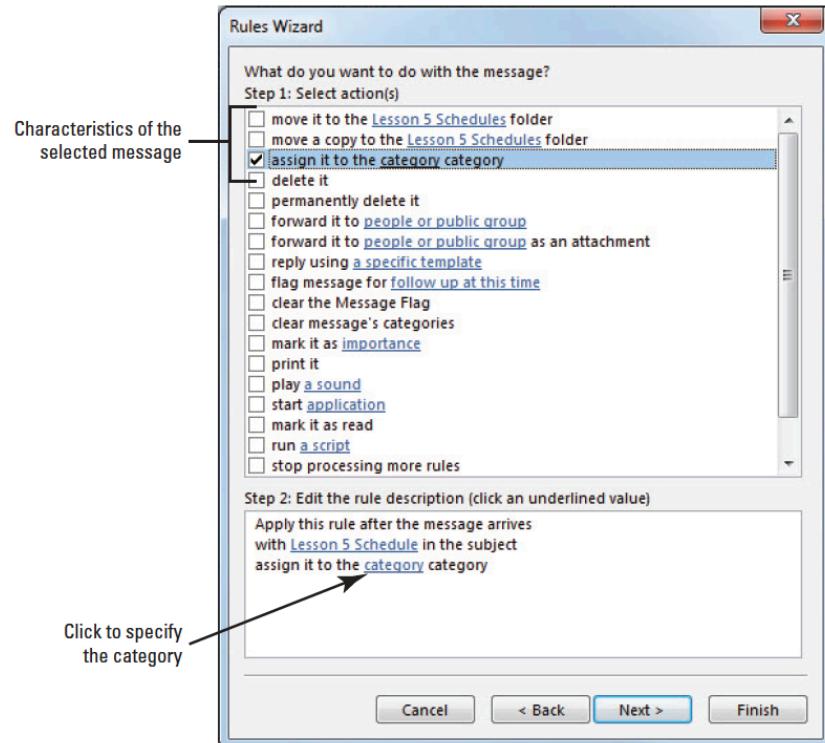


Step by Step: Create a Rule from a Selected Message

4. Click the **Subject contains** check box. The field contains *Lesson 5 Schedule*, the subject of the selected message.
5. Click the **Advanced Options** button to specify additional rule components. The Rules Wizard dialog box is displayed. The condition about the message's subject is already selected in the first Rules Wizard page.
6. Click the **Next** button. The Rules Wizard dialog box lists the available actions for the rule. Actions based on the selected message are displayed at the top of the list.

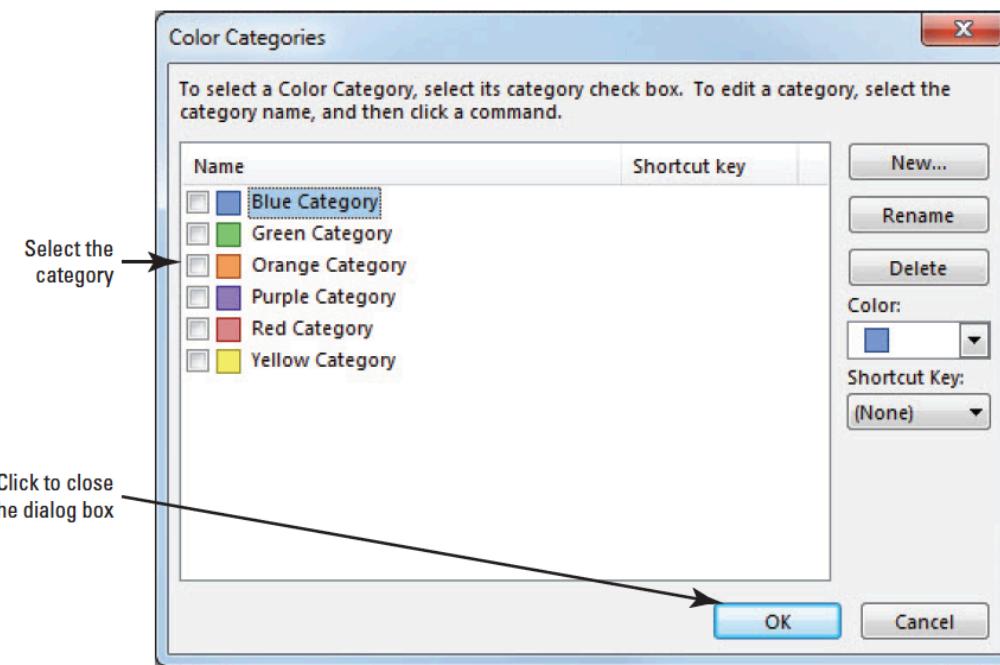
Step by Step: Create a Rule from a Selected Message

7. Click the **assign it to the category** check box. The selected action is moved to the lower area of the dialog box, as shown at right.



Step by Step: Create a Rule from a Selected Message

8. In the *Step 2: Edit the rule description* area, click the underlined **category**. The Color Categories dialog box is displayed, as shown below.



Step by Step: Create a Rule from a Selected Message

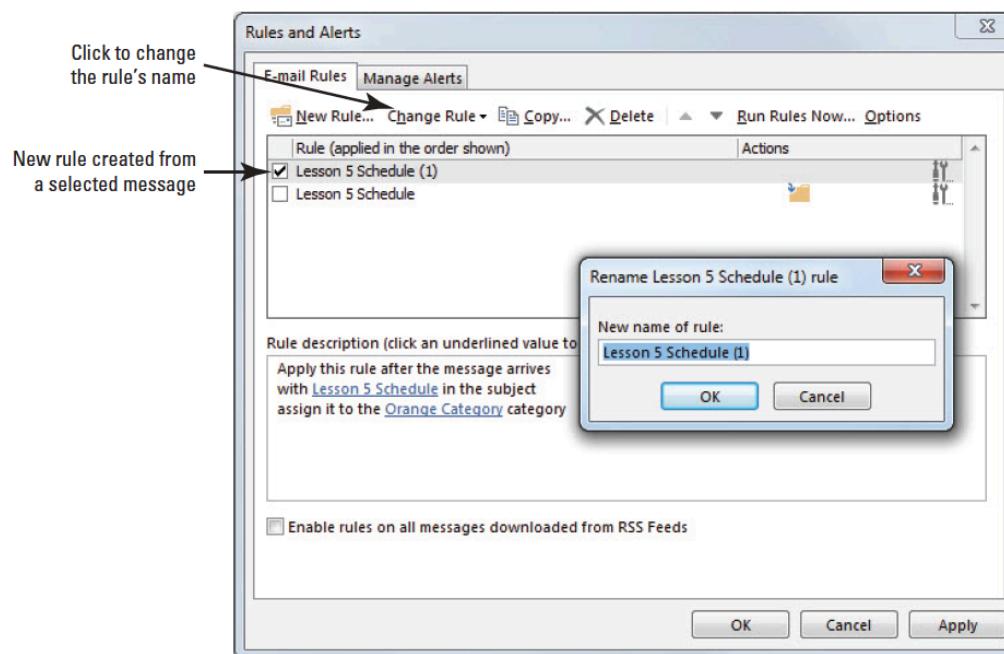
9. Click the **Orange Category** check box; then click **OK**. When you complete the exercise and run the rule, messages that match the conditions you've outlined will be highlighted with orange, making them easier to spot in a message list.
10. If a Rename Category dialog box is displayed, click the **No** button. The Color Categories dialog box is closed, and you are returned to the Rules Wizard dialog box.

Step by Step: Create a Rule from a Selected Message

11. The condition and action for the rule are complete. You don't want to identify any exceptions. Click the **Finish** button. The rule is saved. The Rules Wizard dialog box is closed, and you are returned to the main Outlook window. In the following steps, you will rename and test the new rule.
12. On the HOME tab, click **Rules** in the Move group, and select the **Manage Rules & Alerts** option. The Rules and Alerts dialog box is displayed. The new rule you just created is identified as **Lesson 5 Schedule (1)**. The name was inherited from the rule already applied to the message when you selected the message.

Step by Step: Create a Rule from a Selected Message

13. If necessary, select only the **Lesson 5 Schedule (1)** rule or de-select the other rule. Click the **Change Rule** button, and click the **Rename Rule** option. The Rename dialog box is displayed, as shown below.



Step by Step: Create a Rule from a Selected Message

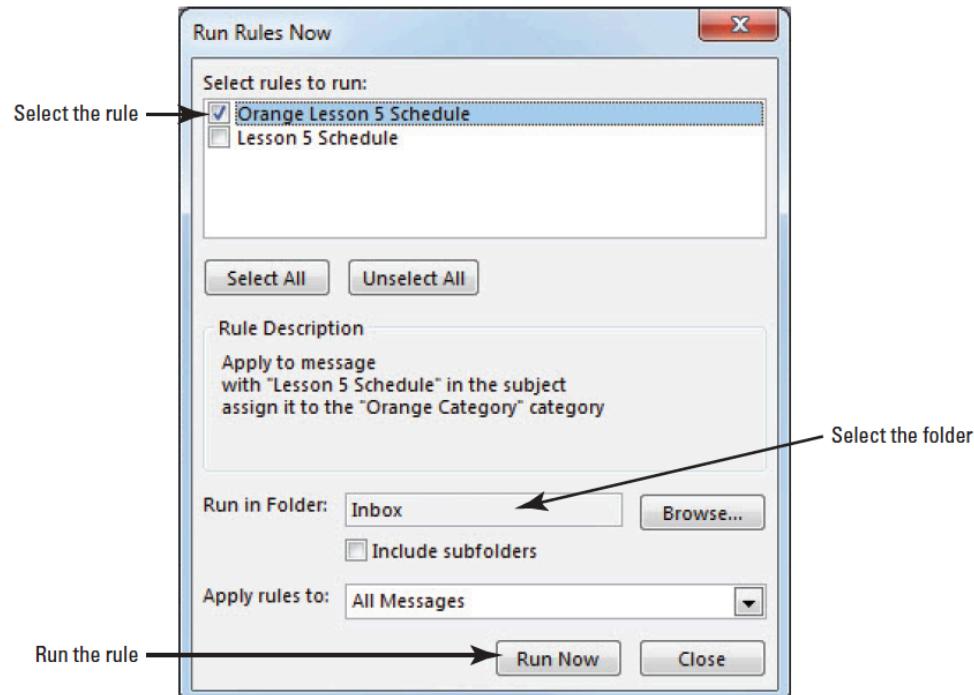
14. In the *New name of rule* field, key **Orange Lesson 5 Schedule**; then click **OK**. The Rename dialog box is closed. The name of the rule has been changed.
 15. Click **OK** to close the Rules and Alerts dialog box.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

Step by Step: Run a Rule

- **GET READY. LAUNCH** Outlook if it is not already running.
 1. If necessary, click the **Mail** button in the Navigation bar to display the mailbox. If necessary, click **Inbox** in the Folders List to display your standard mailbox.
 2. Click the **FILE** tab to return to Backstage view. Click **Manage Rules & Alerts**.
 3. Click the **Run Rules Now** button. The Run Rules Now dialog box is displayed.

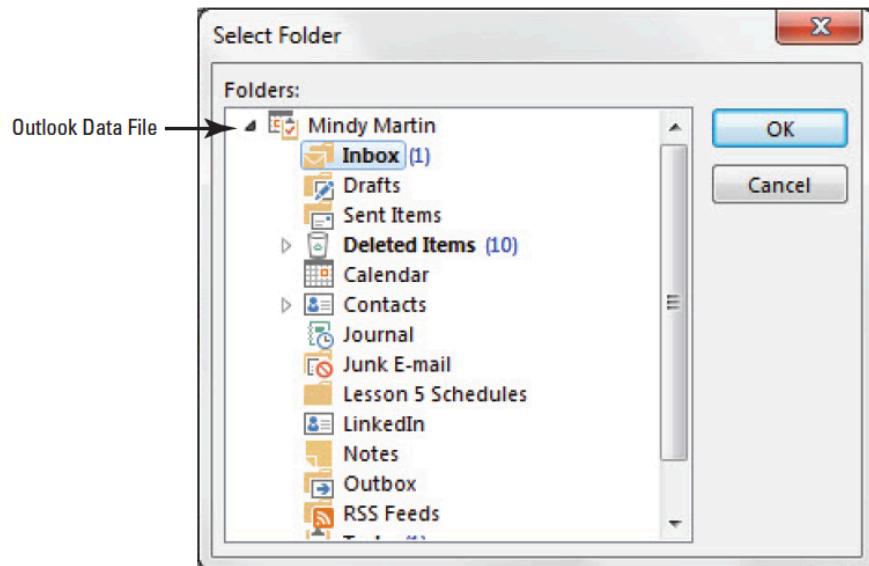
Step by Step: Run a Rule

4. In the *Select rules to run* section, click the **Orange Lesson 5 Schedule** check box, as shown at right.



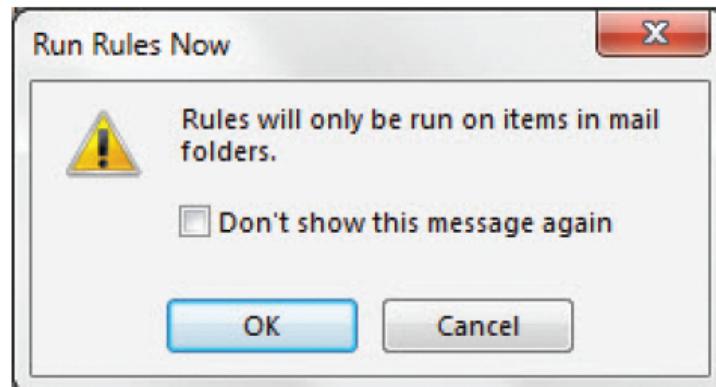
Step by Step: Run a Rule

5. Click the **Browse** button in the Run in Folder section. The Select Folders list is displayed in the Select Folder dialog box, as shown at right.
6. Click the **Outlook Data File** folder and click **OK**.



Step by Step: Run a Rule

7. Click the **Include subfolders** check box.
8. Click the **Run Now** button. The rule runs quietly in the background. Because you are running the new rule against the entire Outlook Data File folder, Outlook presents the message shown below asking you to verify that you ~~only~~ want to run the rule against mail items.

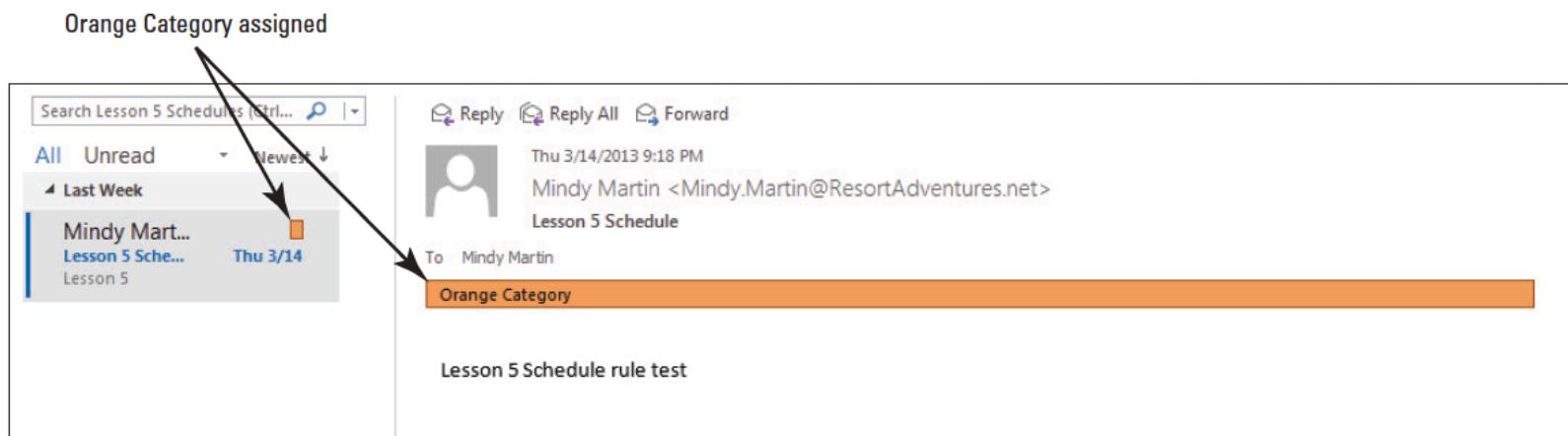


Step by Step: Run a Rule

9. Click the **Don't show this message again** checkbox and click **OK**.
10. Click the **Close** button, and click the **OK** button to return to the Outlook Backstage view.
11. Click the **Back** button to return to the main Outlook window.

Step by Step: Run a Rule

12. Click the **Lesson 5 Schedules** folder. Because you have a message in the Lesson 5 Schedules folder that matches the conditions of this rule, the Orange Category has been assigned to the message in the message list, as shown below.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

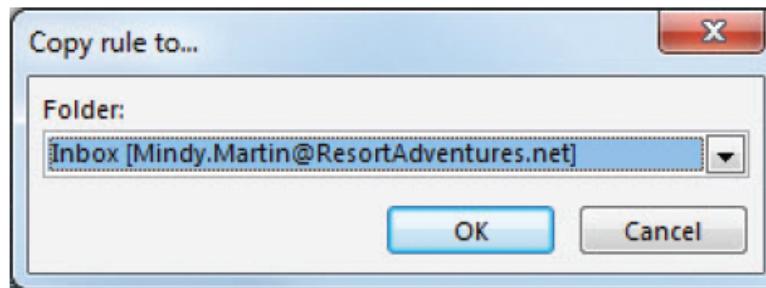


Step by Step: Create a Rule by Copying an Existing Rule

- **USE** the message and the rule created in a previous exercise.
 1. If necessary, click the **Mail** button in the Navigation bar to display the mailbox.
 2. On the HOME tab, click the **Rules** command in the Move group. Select the **Manage Rules & Alerts** option from the menu that appears. The Rules and Alerts dialog box is displayed.

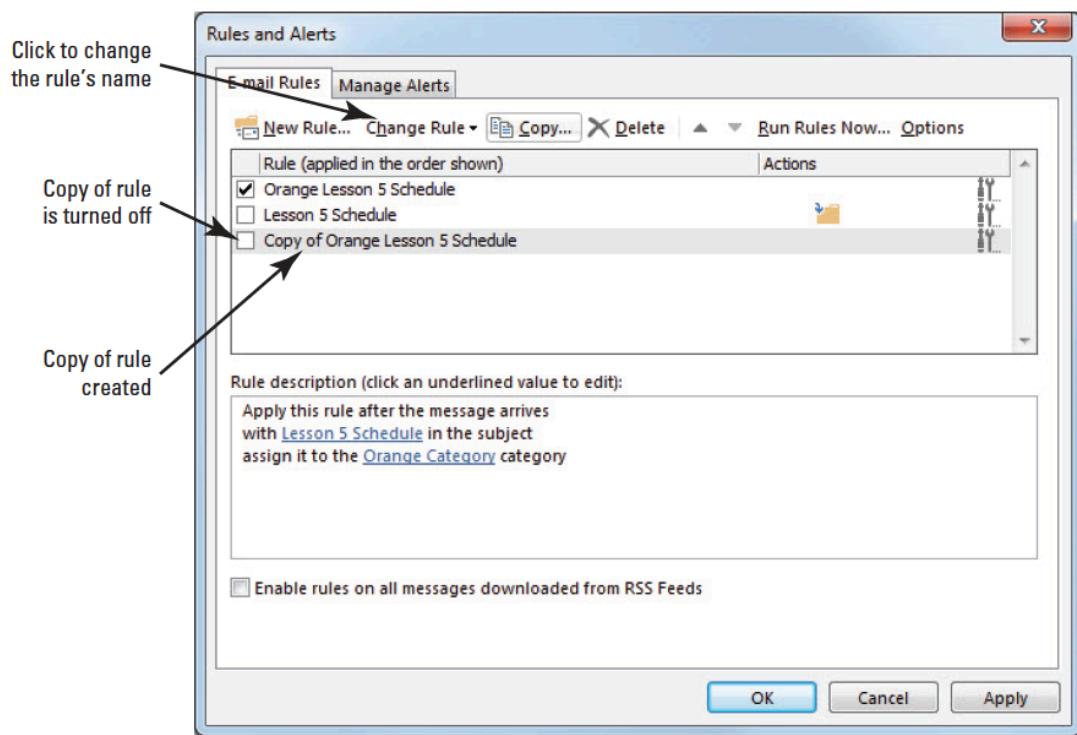
Step by Step: Create a Rule by Copying an Existing Rule

3. Select the **Orange Lesson 5 Schedule** rule, and click the **Copy** button in the Rules and Alerts dialog box. The **Copy Rule To** dialog box is displayed, as shown below. The Folder listing in this dialog box identifies the Inbox as being affected by the rule.



Step by Step: Create a Rule by Copying an Existing Rule

- Click OK to accept the Folder listing and close the dialog box. A copy of the selected rule is created and added to the list of rules, as shown at right.



Step by Step: Create a Rule by Copying an Existing Rule

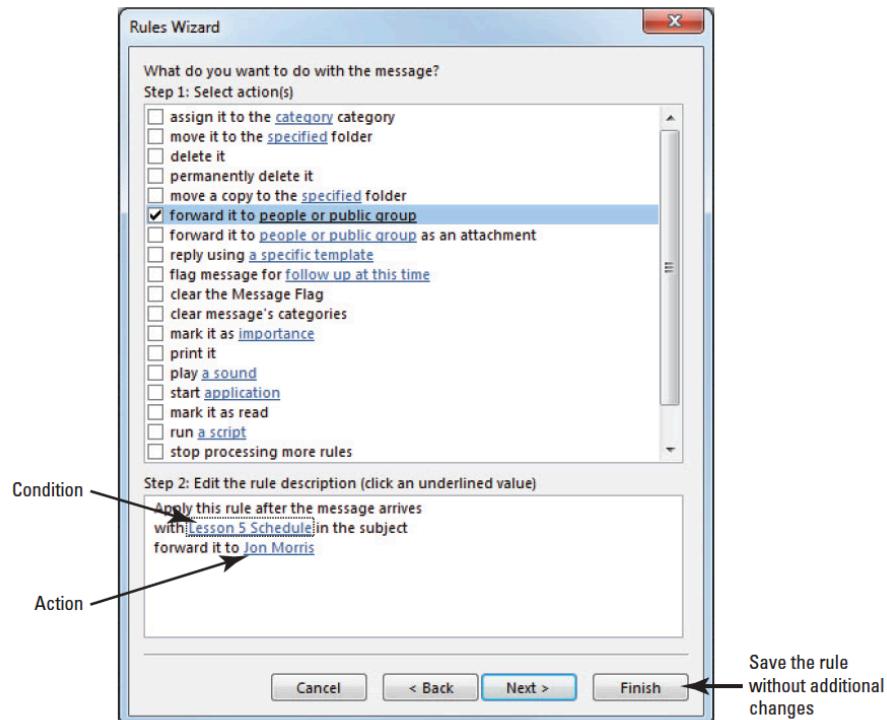
5. Select the **Copy of Orange Lesson 5 Schedule** rule, if necessary, and de-select the other rules. Click the **Change Rule** button, and click **Rename Rule**. The Rename dialog box is displayed.
6. In the *New name of rule* field, key **Forward Lesson 5 Schedule**; then click **OK**. The dialog box is closed, and the rule's name is changed.
7. With the *Forward Lesson 5 Schedule* rule selected, click the **Change Rule** button, and click the **Edit Rule Settings** option. The Rules Wizard dialog box is displayed.

Step by Step: Create a Rule by Copying an Existing Rule

8. The condition about the message's subject is already selected. Click the **Next** button. The Rules Wizard dialog box lists the available actions for the rule.
9. Click the **assign it to the category category** check box to deselect the action.
10. Click the **forward it to people or public group** check box. The action is moved to the rule description in the lower area of the Rules Wizard dialog box.
11. In the *Step 2: Edit the rule description* area, click the underlined **people or public group** text. The Rule Address dialog box is displayed.

Step by Step: Create a Rule by Copying an Existing Rule

12. In the *To* field at the bottom of the dialog box, key [the email address of a friend or coworker]. Click the OK button to close the dialog box. The Rules Wizard dialog box is updated, as shown at right.



Step by Step: Create a Rule by Copying an Existing Rule

13. This rule does not have exceptions. Click the **Finish** button to save the rule and return to the Rules and Alerts dialog box.
14. If necessary, click the **Forward Lesson 5 Schedule** check box to turn on the rule.
15. Click the **Run Rules Now** button. The Run Rules Now dialog box is displayed.
16. Click the **Forward Lesson 5 Schedule** check box and the **Include subfolders** check box.

Step by Step: Create a Rule by Copying an Existing Rule

17. Click the **Run Now** button. Outlook looks through your mailbox for messages that meet the conditions you set and forwards them on to the email address you specified in the Rule Address dialog box.
 18. Click the **Close** button. Click **OK** to return to the main Outlook window. The forwarded message is listed in the Sent Items folder.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

Step by Step: Create a Rule from Scratch

- **USE** the message you sent in the previous exercise.
 1. If necessary, click the **Mail** button in the Navigation bar to display the mailbox.
 2. Click the **Rules** button on the HOME tab and click the **Manage Rules & Alerts** option. The Rules and Alerts dialog box is displayed.
 3. Click the **New Rule** button. The Rules Wizard dialog box is displayed, ~~as shown in Figure 5-25.~~

Step by Step: Create a Rule from Scratch

4. In the *Start from a blank rule* section, click **Apply rule on messages I receive**. This identifies when the rule will run automatically.
5. Click the **Next** button to continue creating the rule.
6. In this Rules Wizard dialog box, you identify the conditions of the rule. Click **with specific words in the subject**. This rule will identify messages about the selected topic.
7. In the *Step 2* area, click **specific words**. The Search Text dialog box is displayed.
8. In the **Specify words or phrases to search for in the subject** field, key **Lesson 5 Schedule**.

Step by Step: Create a Rule from Scratch

9. Click the **Add** button. The *Lesson 5 Schedule* phrase is enclosed by quotation marks and added to the search list for this rule.
10. Click **OK** to close the Search Text dialog box. The Rules Wizard dialog box is displayed. The *Lesson 5 Schedule* search phrase is identified.
11. Click the **Next** button to continue creating the rule.
12. Available actions are listed in the Rules Wizard dialog box. Click the **delete it** check box.
13. You don't want to add any additional conditions, actions, or exceptions, so click the **Finish** button. The rule is complete: When a message arrives with **Lesson 5 Schedule** in the subject, delete it.

Step by Step: Create a Rule from Scratch

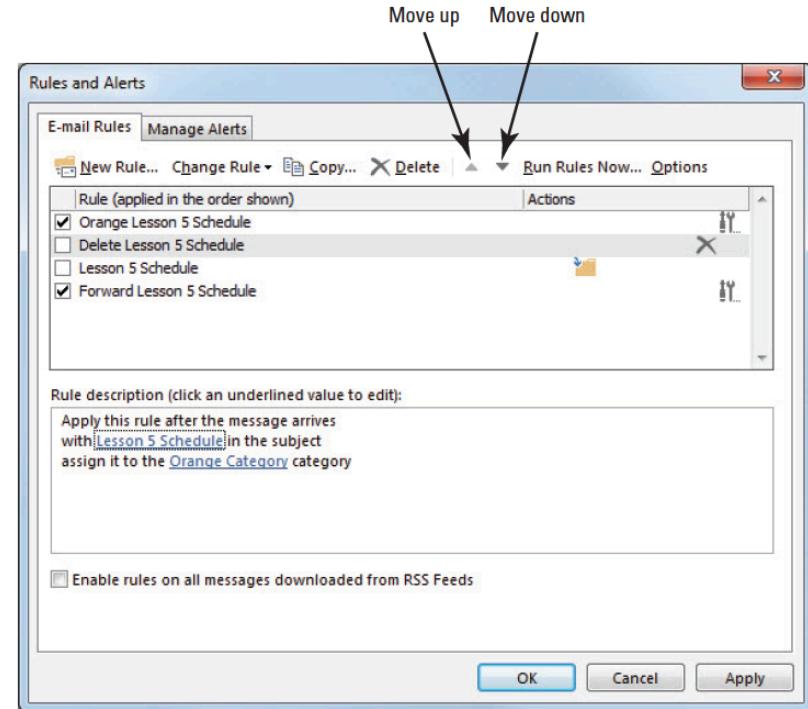
14. Select the **Lesson 5 Schedule (1)** rule, if necessary. Click the **Change Rule** button, and click **Rename Rule**. The Rename dialog box is displayed.
 15. In the *New name of rule* field, key **Delete Lesson 5 Schedule**. Click **OK**. The dialog box is closed, and the rule's name is changed.
 16. Click the **Delete Lesson 5 Schedule** check box to clear it. Click the **OK** button to close the Rules and Alerts dialog box.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

Step by Step: Sequence Rules

- **USE** the rules you created in the previous exercises.
 1. Click **Rules** on the HOME tab and click the **Manage Rules & Alerts** option.
 2. Select the **Delete Lesson 5 Schedule** rule. Click the **Move Down** button three times. The Delete Lesson 5 Schedule rule becomes last on the list of rules.

Step by Step: Sequence Rules

3. With the Delete Lesson 5 Schedule rule still selected, click the **Move Up** button two times. The sequence of your rules should match the rule sequence at right.
 4. Click **OK** to save the changes and close the Rules and Alerts dialog box.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.



Step by Step: Turn Off a Rule

- **USE** the rules you created in the previous exercises.
 1. Click **Rules** on the HOME tab and click the **Manage Rules & Alerts** option. The Rules and Alerts dialog box is displayed.
 2. Click the **Forward Lesson 5 Schedule** check box so the check box is empty and no rules are selected.
 3. Click **OK** to save the changes and close the Rules and Alerts dialog box.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

Step by Step: Delete Rules

- **USE** the rules you created in the previous exercises.
 1. Click **Rules** on the HOME tab and click the **Manage Rules & Alerts** option. The Rules and Alerts dialog box is displayed.
 2. Select the **Delete Lesson 5 Schedule** rule.
 3. Click the **Delete** button.
 4. Click **Yes** in the dialog box to confirm the deletion.
 5.  Click **OK** to save the changes and close the Rules and Alerts dialog box.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

Step by Step: Create an Auto-reply Message

- **GET READY.** You must use a Microsoft Exchange Server account to complete this exercise. If you do not have a Microsoft Exchange Server account, read through the exercise and use it as a reference when preparing for your certification exam.
 1. If necessary, click the **Mail** button in the Navigation bar to display the mailbox.
 2. Click the **FILE** tab and click the **Automatic Replies (Out of Office)** option. The Automatic Reply dialog box is displayed.
 3. Click the **Send automatic replies** option.

Step by Step: Create an Auto-reply Message

4. Select the **Only send during this time range** option. Select **12:00 AM [tomorrow]** as the Start time. Select **12:00 AM [the following day]** as the End time.
5. Click the **Inside My Organization** tab, if necessary.
6. Click the **Outside My Organization** tab, and select the **Auto-reply to people outside my organization** check box.

Step by Step: Create an Auto-reply Message

7. Select **My Contacts only.**
 8. In the text entry area, key **I am out of the office today.
I'll respond to your message tomorrow.**
 9. Click **OK**. The dialog box is closed. The **Auto-reply** message will be sent when you receive messages during this time period.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

Step by Step: Delegate Access to Your Account

- **GET READY.** You must use a Microsoft Exchange Server account to complete this exercise. If you do not have a Microsoft Exchange Server account, read through the exercise and use it as a reference when preparing for your certification exam.
 1. If necessary, click the **Mail** button in the Navigation bar to display the mailbox.
 2. Click the **FILE** tab and click the **Account Settings** option. A group of Account Setting options displays.
 3. Click the **Delegate Access** option.
 4. Click the **Add** button. Type the name of a person who is in the Global Access List for your organization's Exchange.

Step by Step: Delegate Access to Your Account

5. Click **Add** again and then click **OK**. The Delegate Permissions dialog box is displayed showing each of the primary Outlook components. By default, the scroll bar next to the Calendar component has been changed to Editor, which will allow the delegate to read, create, and modify Calendar items.
6. Click the **Automatically send a message to delegate summarizing these permissions** checkbox.
7. Click **OK**. The dialog box is closed. The delegate that you granted access to your Calendar will receive an email notifying them of the change.
8. Click **OK**. The dialog box is closed.

Step by Step: Delegate Access to Your Account

- **PAUSE. LEAVE** Outlook open to use in the next exercise.
- As the owner of the account, you can limit how much access you want to grant to your delegate. The table below describes these parts of a rule.

Delegate Permissions	Description
Send on Behalf	The Send on Behalf permission is the lowest level of access that you can delegate. It gives the recipient permission to read and respond to meeting requests only. It is particularly useful if you have someone else managing your schedule.
Reviewer	The Reviewer permission level allows the delegate to read mail items in your Outlook Data File, but not make any changes to them.
Author	The Author permission level allows the delegate to read any mail items and authorizes them to create new items on your behalf. They can also modify or delete any items that they personally created.
Editor	The Editor permission level means that the delegate can do anything that you can do. They have all the permissions available at the Author level, but they can also modify or delete items that you created.

Step by Step: Modify and Remove Delegate Access

- **GET READY.** You must use a Microsoft Exchange Server account to complete this exercise. If you do not have a Microsoft Exchange Server account, read through the exercise and use it as a reference when preparing for your certification exam.
 1. If necessary, click the **Mail** button in the Navigation bar to display the mailbox.
 2. Click the **FILE** tab, and click the **Account Settings** option. A group of Account Setting options displays.
 3. Click the **Delegate Access** option.

Step by Step: Modify and Remove Delegate Access

4. Select the person that you delegated access to your account in the previous exercise. Click the **Permissions** button. The Delegate Permissions dialog box is displayed showing each of the primary Outlook components similar to the one displayed in the last section.
5. Click the Inbox drop bar and select **Author** from the displayed list to give the person permission to create and send emails from you.

Step by Step: Modify and Remove Delegate Access

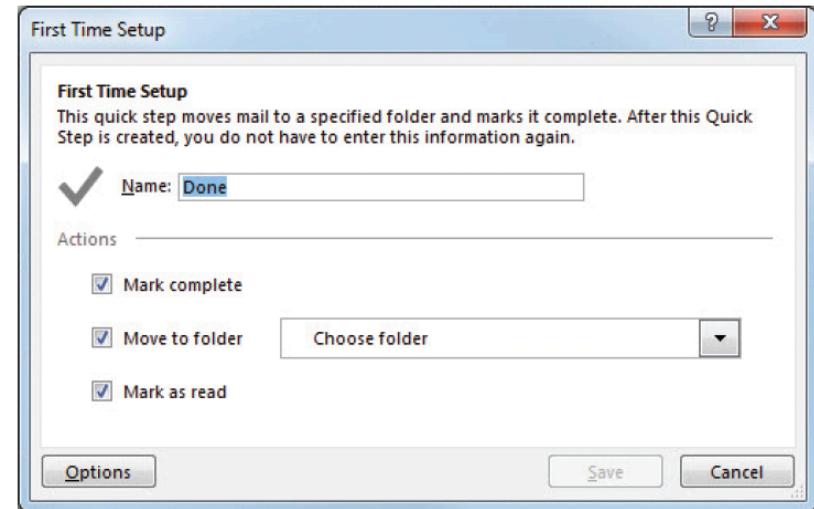
6. Deselect the **Automatically send a message to delegate summarizing these permissions** checkbox, if necessary.
 7. Click **OK**. The dialog box is closed.
 8. In the Delegates box, select the name of the delegate again, and click the **Remove** button. The name disappears from the list.
 9. Click **OK** to close the dialog box having no one selected as a delegate.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

Step by Step: Perform Quick Steps

- **GET READY. LAUNCH** Outlook if it is not already running.
 1. If necessary, click the **Mail** button in the Navigation bar to display the mailbox.
 2. Select the **Sample Private Message** in the message list. If you don't have this message, choose any message with the word *Sample* in the subject.
 3. On the HOME tab, click the **Reply & Delete** button in the Quick Steps group. A *RE: Sample Private Message* window is displayed and the original is moved to the Deleted Items folder. Note that like any other message reply, the **To** field is automatically filled with the name of the person who sent the original message to you.

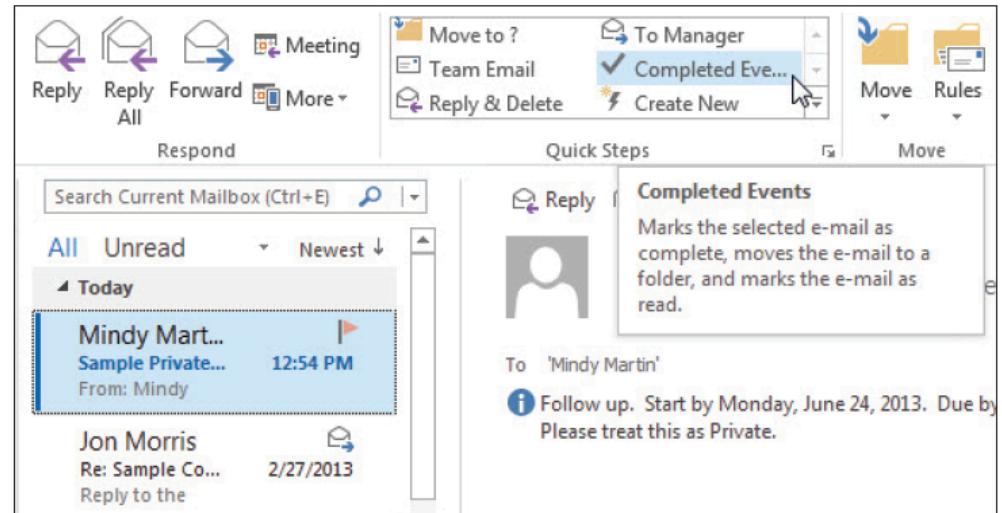
Step by Step: Perform Quick Steps

4. Click **Send**.
5. Click **Send/Receive All Folders** on the HOME tab.
6. Select the newly arrived message and click the **Flag icon** in the message list to flag it for follow up.
7. Click **Done** in the Quick Steps group. The First Time Setup dialog box for the Done Quick Step is displayed, as shown above. The Done Quick Step can perform three actions: mark the message as read, mark it as complete, and move it to a folder you choose.



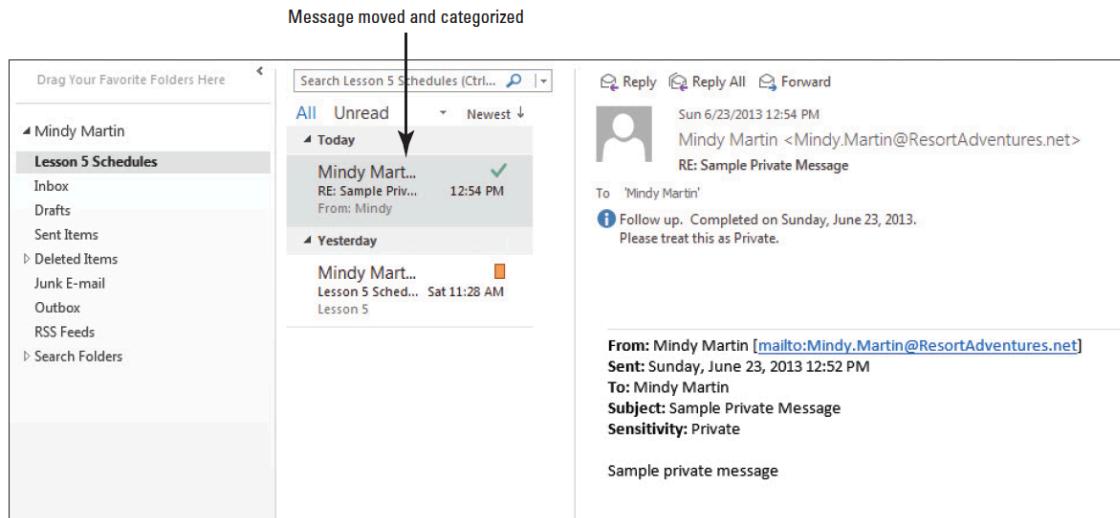
Step by Step: Perform Quick Steps

8. In the Name field, key **Completed Events**. After the setup process, the Quick Step button will be called **Completed Events**.
9. Click the **Choose Folder** down arrow and select the **Lesson 5 Schedules** folder.
10. Click **Save**. The First Time Setup dialog box closes and the Completed Events button appears in the Quick Steps group, as shown above.



Step by Step: Perform Quick Steps

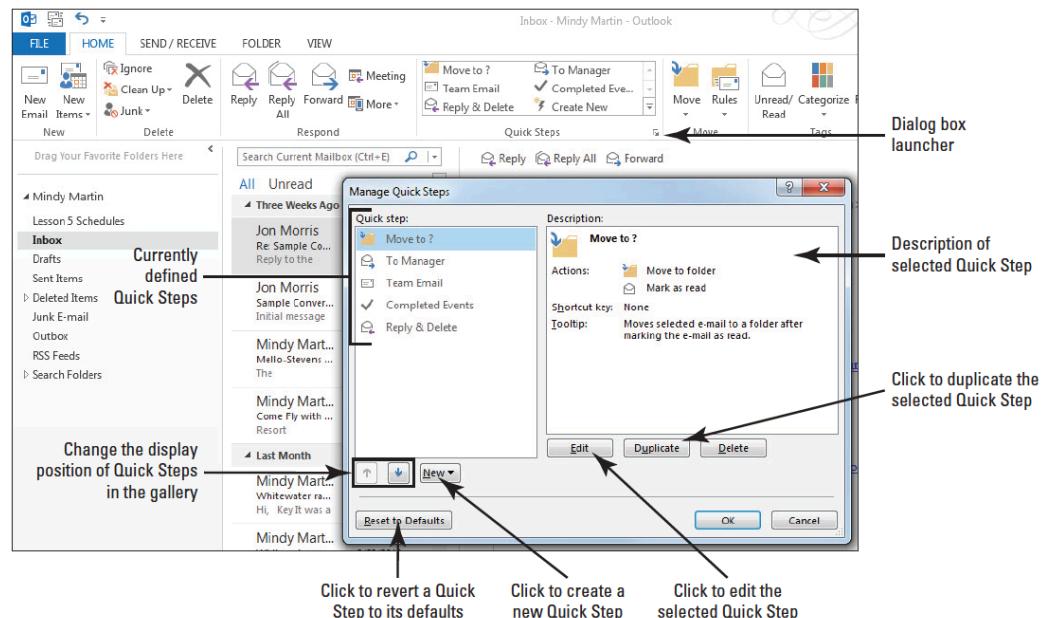
11. With the message still selected, click the new **Completed Events** button in the Quick Steps group. The message is moved to the Lesson 5 Schedules folder and is marked as read and completed.
 12. Click the **Lesson 5 Schedules** folder in the Folder List, as shown below.
- **PAUSE. LEAVE**
Outlook open to
use in the next
exercise.



Step by Step: Edit Quick Steps

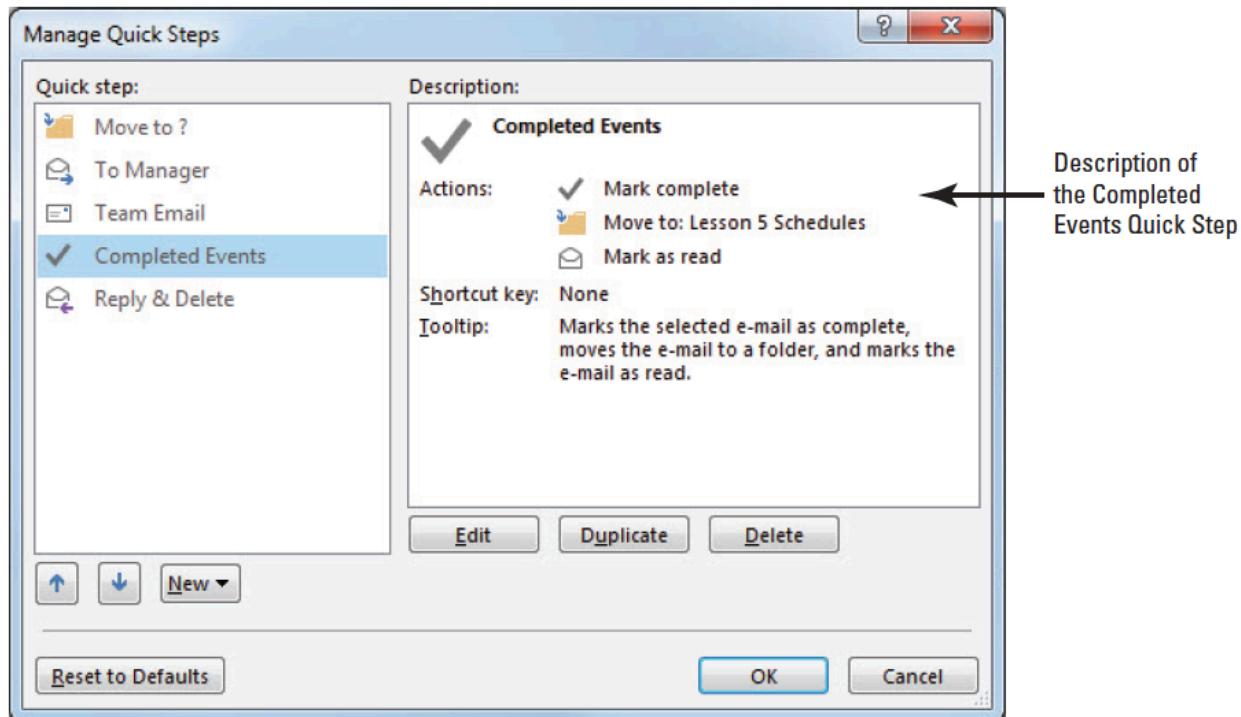
- **GET READY. LAUNCH**
Outlook if it is not
already running and be
sure to complete the
previous exercise.

1. If necessary, click the **Mail** button in the Navigation bar to display the mailbox.
2. Click the **dialog box launcher** in the Quick Steps group to open the Manage Quick Steps dialog box, as shown above.



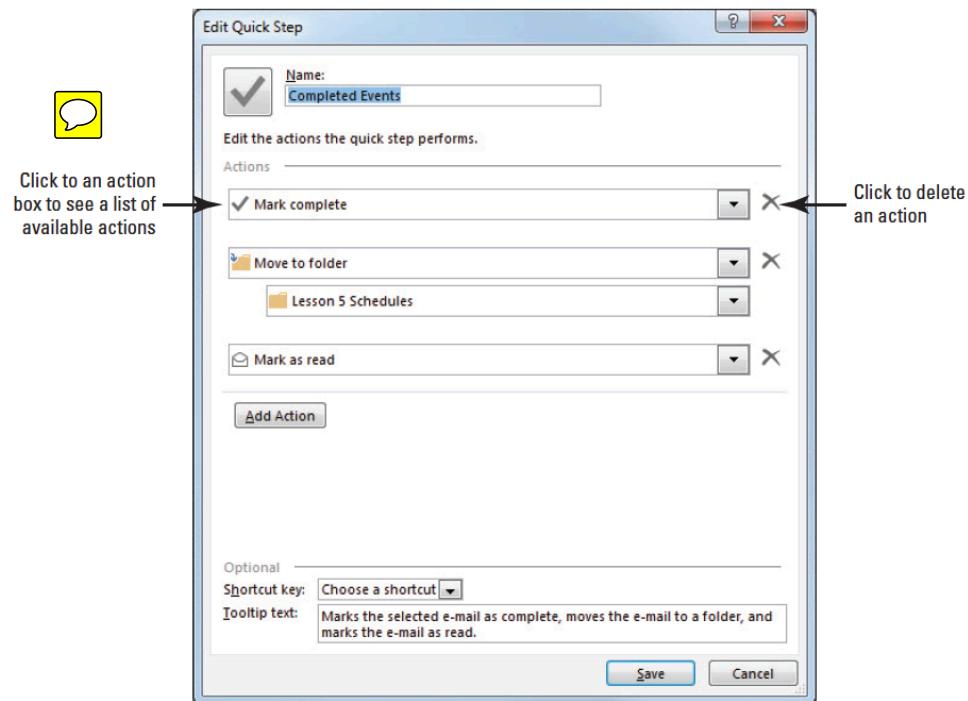
Step by Step: Edit Quick Steps

4. In the *Quick step* area, select **Completed Events**. The Description area changes to define the actions performed by this Quick Step, as shown below.



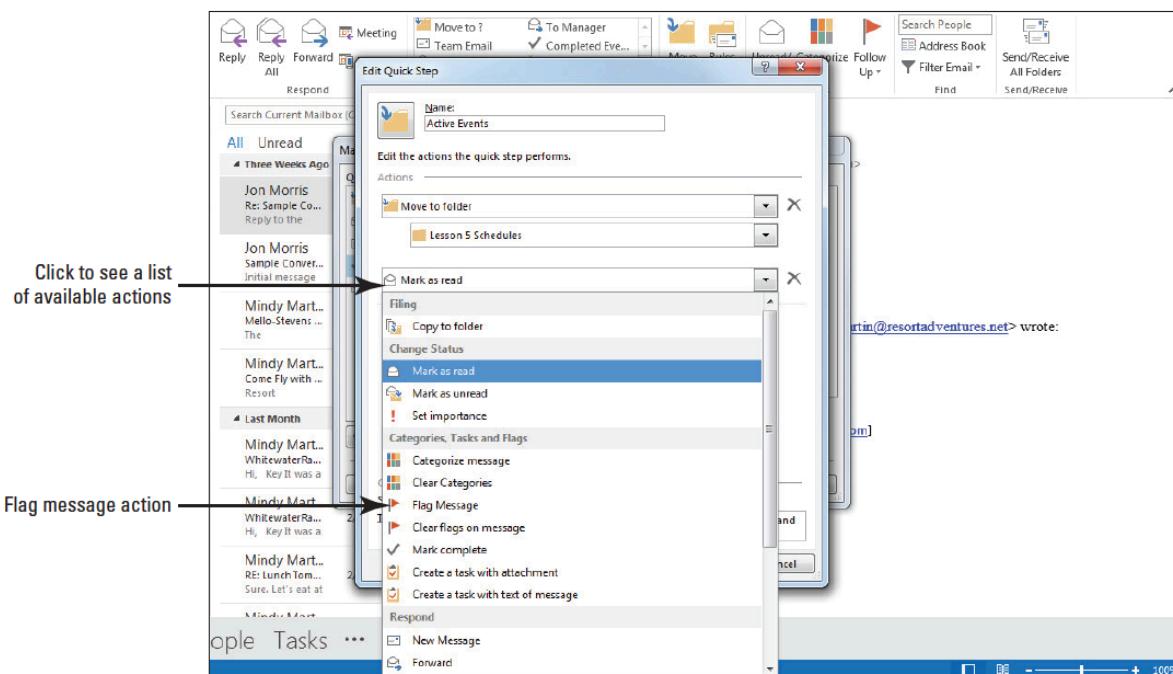
Step by Step: Edit Quick Steps

4. Click the **Edit** button. The Edit Quick Step dialog box is displayed, as shown at right.
5. In the **Name** field, select the existing text and key **Active Events**.
6. Click the **Delete** button next to the **Mark Complete** action.



Step by Step: Edit Quick Steps

7. Click the **Mark as Read** action's dropdown arrow. A dropdown list of options is displayed, as shown below.
8. Select the **Flag Message** option. A new **Choose flag action** box is displayed.

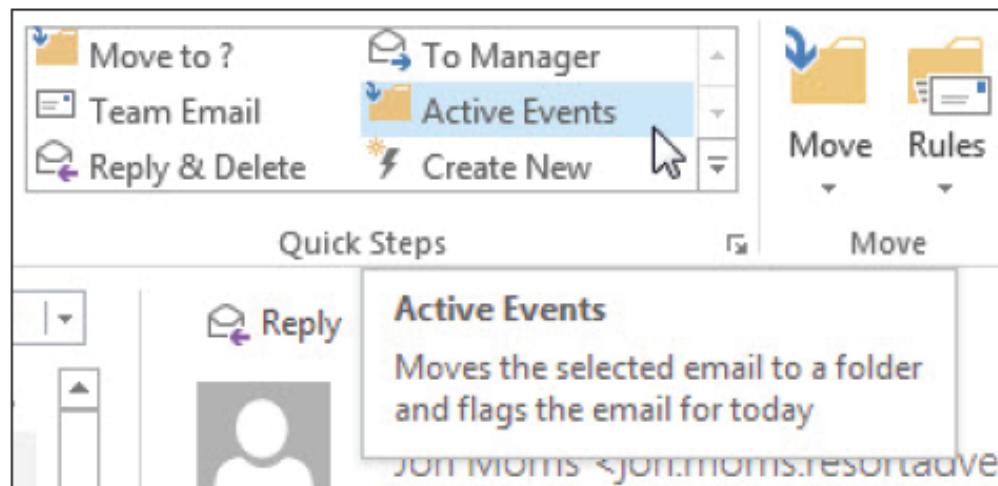


Step by Step: Edit Quick Steps

9. Click the **Choose Flag** action's dropdown arrow, and select the **Today** option.
10. Because the actions have changed, the Tooltip information is no longer correct. Select the Tooltip text at the bottom of the Edit Quick Step dialog box, and key **Moves the selected email to a folder and flags the email for today**.
11. Click **Save** to close the Edit Quick Step dialog box. Click **OK** to close the Manage Quick Steps dialog box. The Completed Events Quick Step has been replaced with the new Active Events Quick Step in the Quick Steps gallery.

Step by Step: Edit Quick Steps

12. Point the cursor at the Active Events icon in the Quick Steps gallery to see the new tip, as shown below.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.



Step by Step: Duplicate Quick Steps

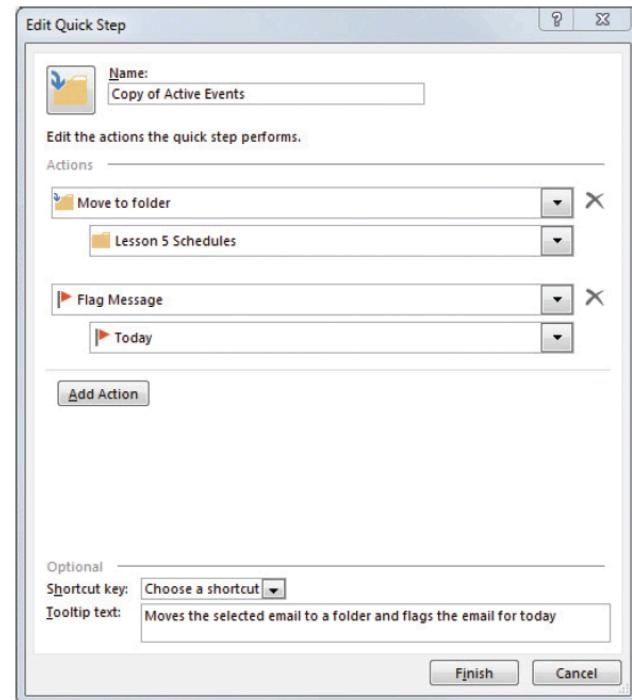
- **GET READY. LAUNCH** Outlook if it is not already running.
 1. If necessary, click the **Mail** button in the Navigation bar to display the mailbox.
 2. Right-click **Outlook Data Files** in the Folders List, and click **New Folder** in the shortcut menu. A New Folder name box appears in the Folders List.
 3. Key **Pending Reservations** and **[Press Enter]**. The new folder is displayed in the Folders List.

Step by Step: Duplicate Quick Steps

4. On the HOME tab, in the Quick Steps group, click the **More** button to open the Quick Steps gallery.
5. Select **Manage Quick Steps**. The Manage Quick Steps dialog box is displayed. Note: This is the same dialog box that is opened when you click on the dialog box launcher in the Quick Steps group.

Step by Step: Duplicate Quick Steps

6. Click **Active Events** in the Quick Step list in the Manage Quick Steps dialog box; then click **Duplicate**. The Edit Quick Step dialog box is displayed. The text *Copy of Active Events* is automatically entered into the **Name** field, as shown at right.
7. Click the **Lesson 5 Schedules** dropdown box. A dropdown list of available folders appears.



Step by Step: Duplicate Quick Steps

8. Select the **Pending Reservations** folder. The list collapses.
 9. In the Name field, key **Pending Projects**.
 10. Click **Finish**. Click **OK**. The new Quick Step appears in the Quick Steps gallery, as shown below.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.



Step by Step: Create Quick Steps

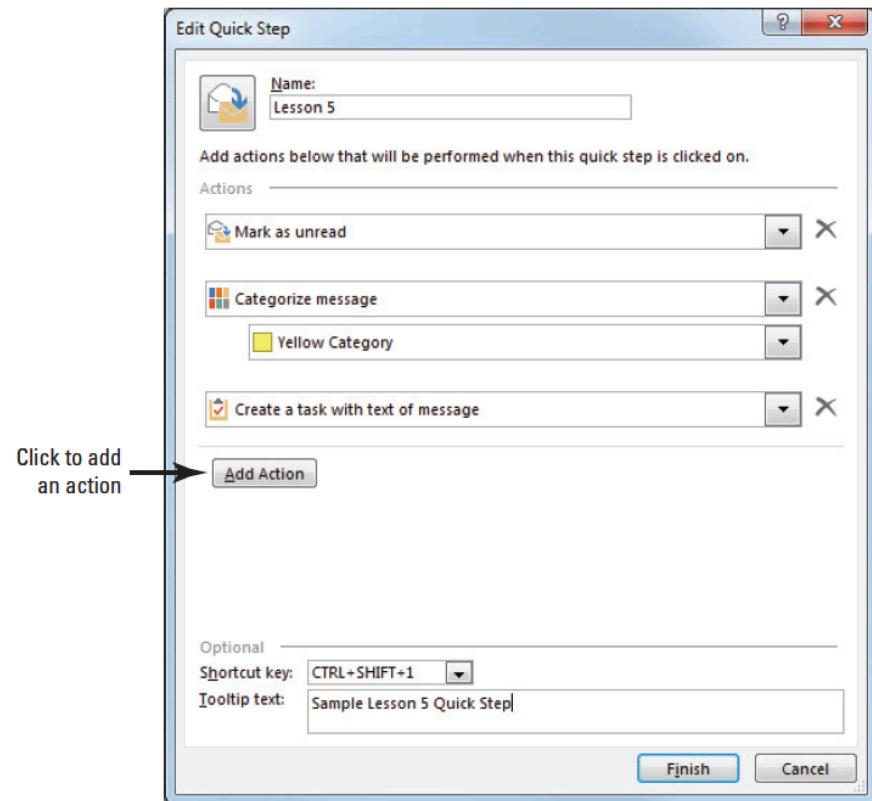
- **GET READY. LAUNCH** Outlook if it is not already running.
 1. If necessary, click the **Mail** button in the Navigation bar to display the mailbox.
 2. On the HOME tab, in the Quick Steps group, click **Create New**. The Edit Quick Step dialog box opens with no actions selected.
 3. In the Name box, key **Lesson 5**.
 4. Click the **Choose an Action** dropdown box, and select **Mark as Unread**.

Step by Step: Create Quick Steps

5. Click the **Add Action** button.
6. Click the new **Choose an Action** dropdown box, and select **Categorize message**.
7. In the Choose category dropdown box, select **Yellow Category**.
8. Click the **Add Action** button.
9. In the new **Choose an Action** dropdown box, select **Create a task with text of message**.
10. In the Optional area, click the **Shortcut key** down arrow and select **[Ctrl+Shift+1]**.

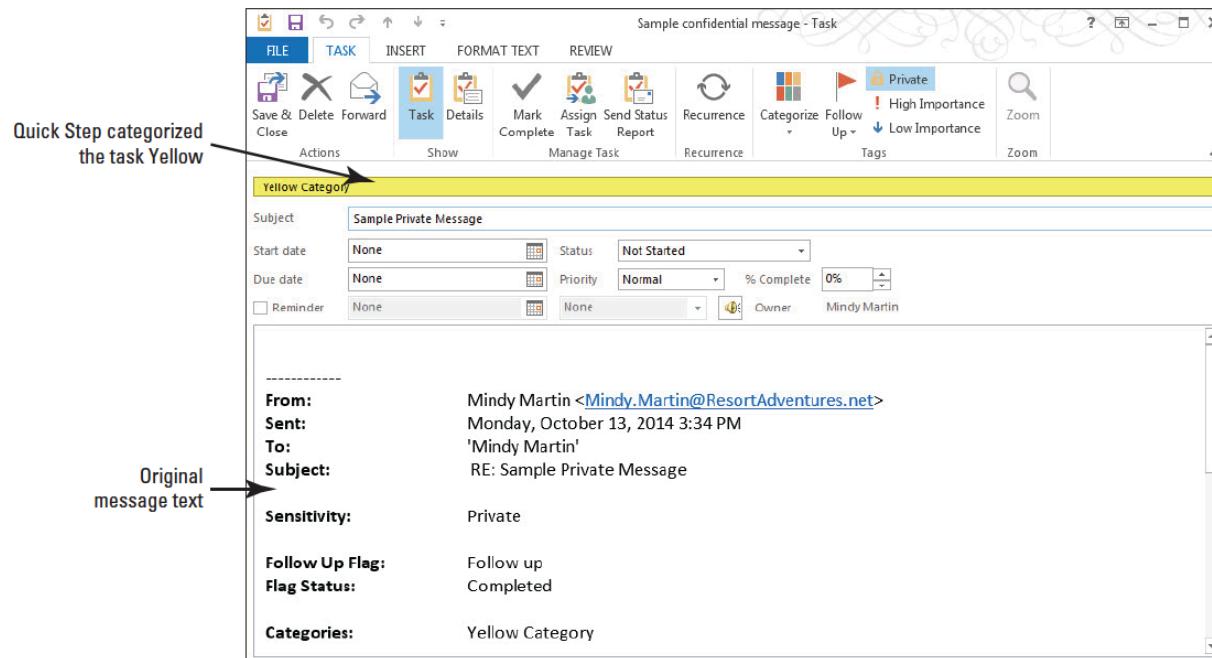
Step by Step: Create Quick Steps

11. In the Tooltip text box, key **Sample Lesson 5 Quick Step**, as shown at right.
12. Click **Finish**. The new Quick Step appears in the Quick Steps gallery.
13. Open the **Lesson 5 Schedules** folder.



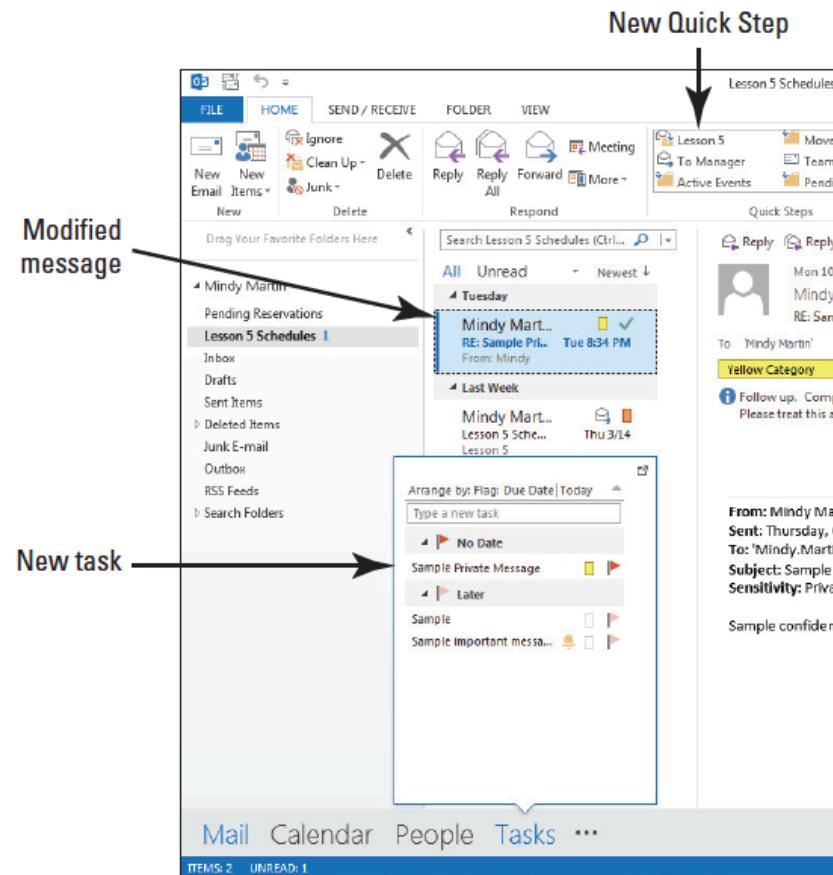
Step by Step: Create Quick Steps

14. Select the completed private message, and click the new **Lesson 5 Quick Step** in the Quick Steps gallery. A Sample private message Task window is displayed showing the contents of the message in the body, as shown below.



Step by Step: Create Quick Steps

15. Click the **Save & Close** button in the Actions group on the TASK tab. The message is now marked as unread and categorized yellow.
 16. Hover your mouse over the **Tasks** button on the Navigation bar. The Tasks peek opens over the mailbox displaying the newly created task, as shown at right.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

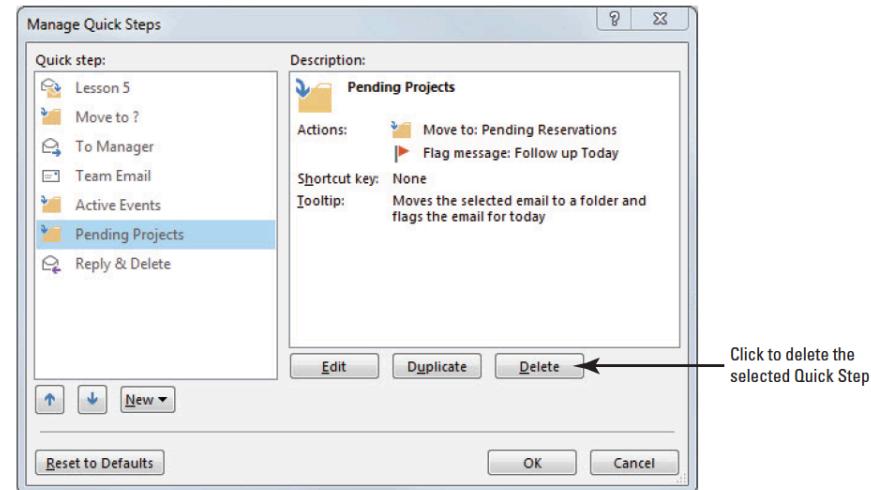


Step by Step: Delete Quick Steps

- **USE** the Pending Projects Quick Step that you created in a previous exercise.
 1. If necessary, click the **Mail** button in the Navigation bar to display the mailbox.
 2. Click the **dialog box launcher** for the Quick Steps group. The Manage Quick Steps dialog box is displayed.

Step by Step: Delete Quick Steps

3. Click **Pending Projects** from the Quick Step list. The Pending Projects description appears in the right pane as shown at right.
 4. Click the **Delete** button. The Pending Projects Quick Step is immediately removed from the Quick Step list.
 5. Click **OK** to close the dialog box.
- **PAUSE. LEAVE** Outlook open to use in the next exercise.

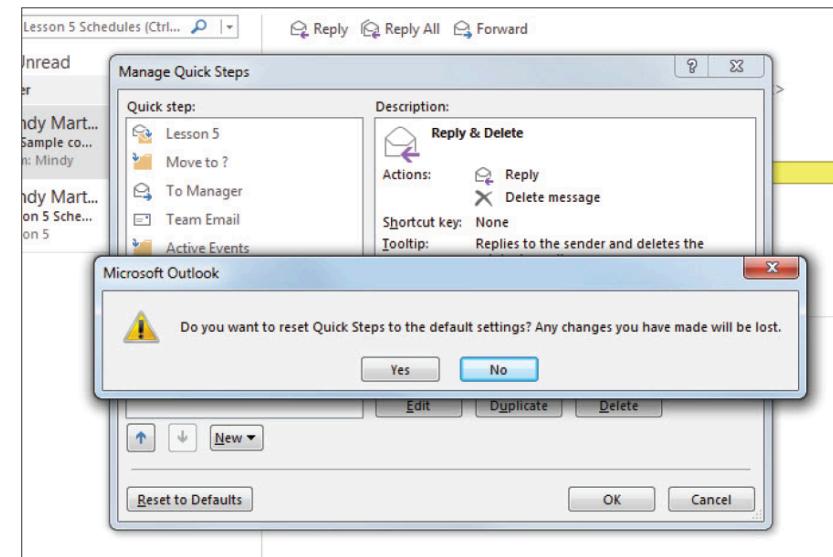


Step by Step: Reset Quick Steps to Default

- **GET READY. LAUNCH** Outlook if it is not already running.
 1. If necessary, click the **Mail** button in the Navigation bar to display the mailbox.
 2. Click the **dialog box launcher** in the Quick Steps group to open the Manage Quick Steps dialog box.

Step by Step: Reset Quick Steps to Default

3. Click the **Reset to Defaults** button. A message is displayed warning you that any changes will be lost, as shown at right.
4. Click **Yes**. The Quick Steps in the Manage Quick Steps dialog box revert back to the original list.
5. Click **OK** to close the dialog box.
- **CLOSE** Outlook.



Skill Summary

Skills	Exam Objective	Objective Number
Creating and Running Rules	Create and manage rules	1.2.4
Managing Rules	Create and manage rules	1.2.4
Working with Automated Microsoft Exchange Tools	Create auto-replies Delegate access	1.2.5 2.1.13
Using Quick Steps	Apply Quick Steps	1.2.3