Unit 6: Email Messaging (Intermediate)

CONTENTS

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SESSION 1: WORKING WITH CALENDAR

Relevant Knowledge

Time Management is the act of planning to stay organized that will result in increased efficiency and productivity. Time management can be performed using simple techniques such as a paper and pen; you can also use calendar software to plan your time.

Calendaring software provides the user an electronic version of a calendar. It is a time management tool, a system of organizing days for social, religious, commercial, or administrative purposes. Most email applications include support for working with Calendar; you can also use online calendar such as Google Calendar however this requires internet connectivity.

In this exercise, you will learn to work with a calendar application. In these exercises, you will be practicing on Outlook Calendar. At the end of the sessions, you can easily navigate on any other calendar software as the features are almost the same. To learn about Google calendar you can explore the site http://services.google.com/apps/resources/overviews_breeze/Calendar/index. html.

Start the email program by:

Click Start > Programs > Microsoft Office > Microsoft Outlook.

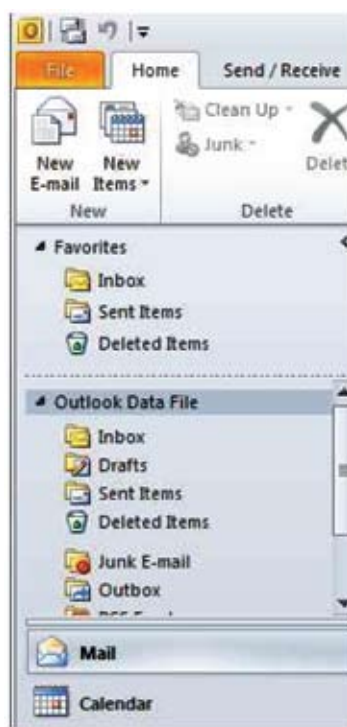Click Calendar located at the bottom left corner (figure below).

Figure 1

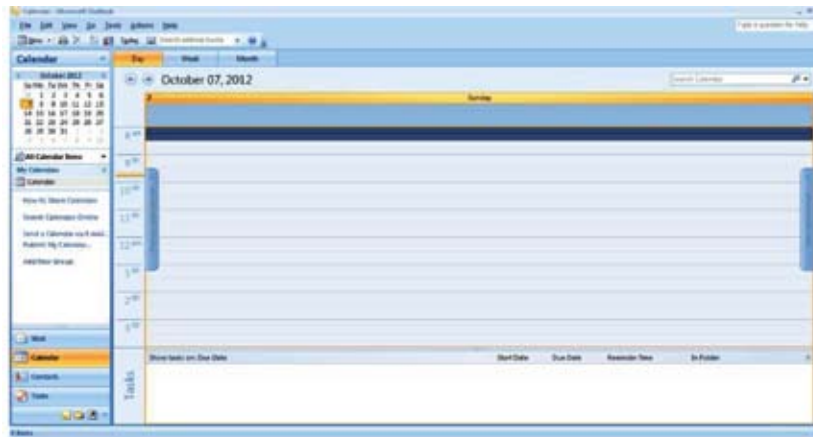A window similar to the one below appears.

Figure 2

You can create appointments and schedule day-to-day activities using calendar. The application provides three views:

- Day
- Week
- Month

Figure 3

For example, to schedule an activity for a particular time in the day, choose Day view. The default view is by "Day".

You can select either the *Show work week* (Monday to Friday) or *Show full week* (Sunday to Saturday) to view the appropriate days in the week by selecting one of the given options.

Figure 4

Selecting the Month view shows calendar for a month. You can plan your monthly schedule here. Any appointments/meetings/commitments previously set in the day/week view will also be reflected here.

You can switch over to a specific date in the calendar by selecting the date in the data navigator.

Figure 5

You can set the options for the calendar by selecting **_Tools_** > **_Options._** A dialog box appears as shown below.

Figure 6

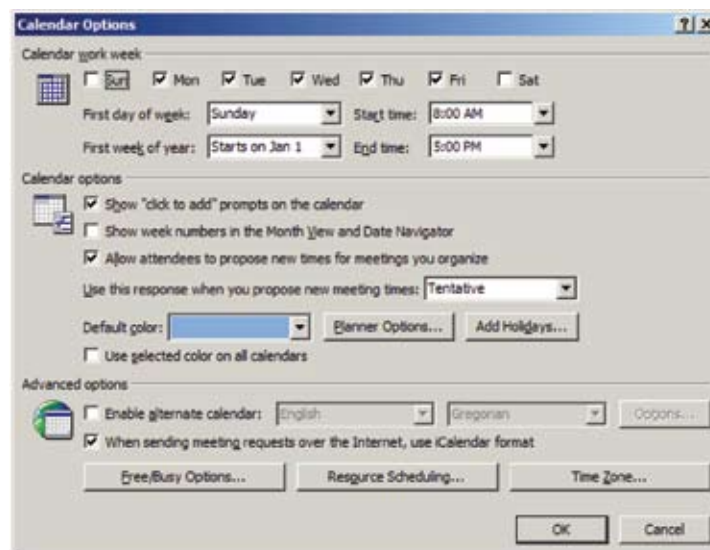Click on **_Calendar Options…_** and a dialog box appears as shown below.

Figure 7

You can make changes to the calendar by using appropriate options in the dialog box.

EXERCISE

Perform the following activities till you are confident:

S.No.	Activities
1.	Try each of the options in the Calendar Options dialog box and observe the changes. Make a note of all changes in your notebook.

ASSESSMENT

Fill in the blanks:

1. _____ is the act of planning to stay organized that will result in increased efficiency and productivity.

2. A _____ software provides the user an electronic version of a calendar.

3. The three view supported by a calendaring software are _____ , _____ & _____.

SESSION 2: SCHEDULE AN APPOINTMENT

Relevant Knowledge

You can create appointments using the calendar. For example, you can create an appointment for visiting a dentist.

In this exercise, you will learn to schedule an appointment.

You can schedule an appointment in two ways:

1. Using menu bar.

2. Using calendar view.

Go to *__File__* > *__New__* > *__Appointment__*, a window similar to the one below will be displayed.
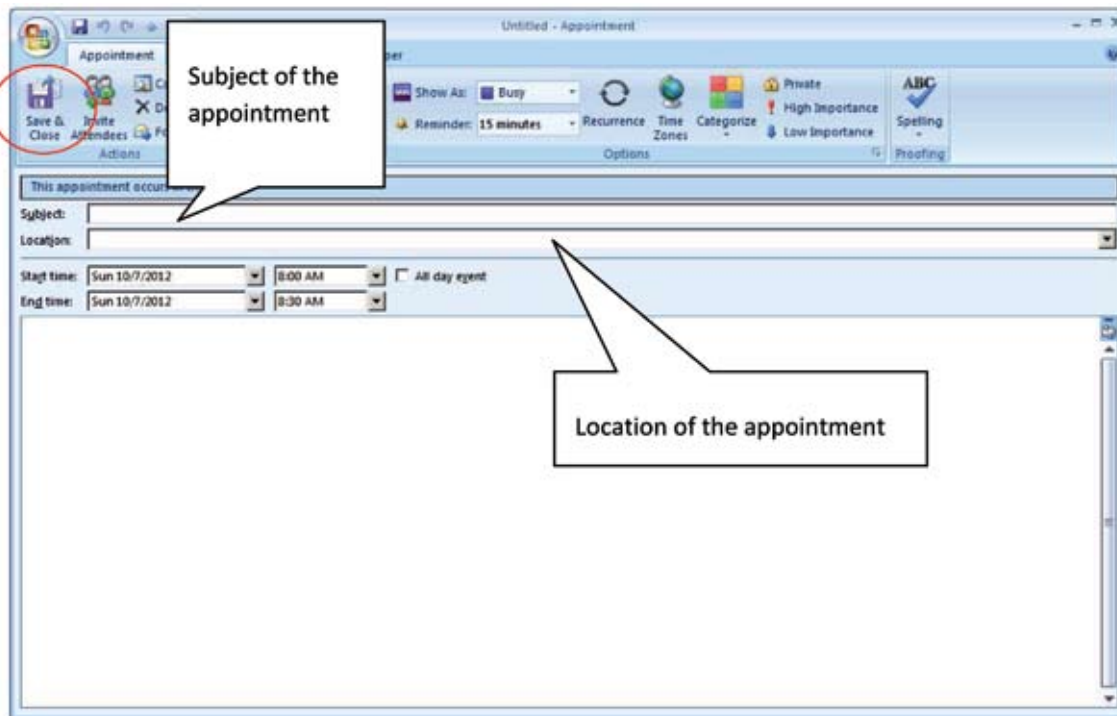
Figure 8

Once you have created an appointment, click the **Save & Close** option for the calendar to store this information. The details will be reflected in the calendar.
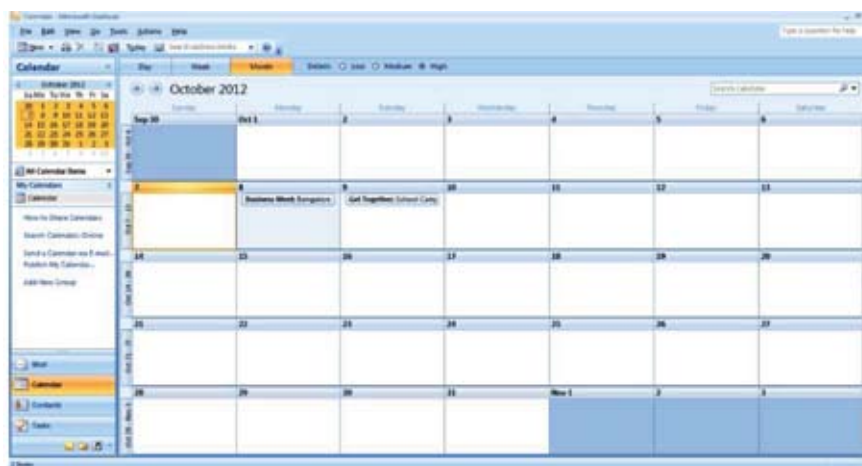

Figure 9

Calendar software prompts you with an alert based on entries scheduled in the calendar.
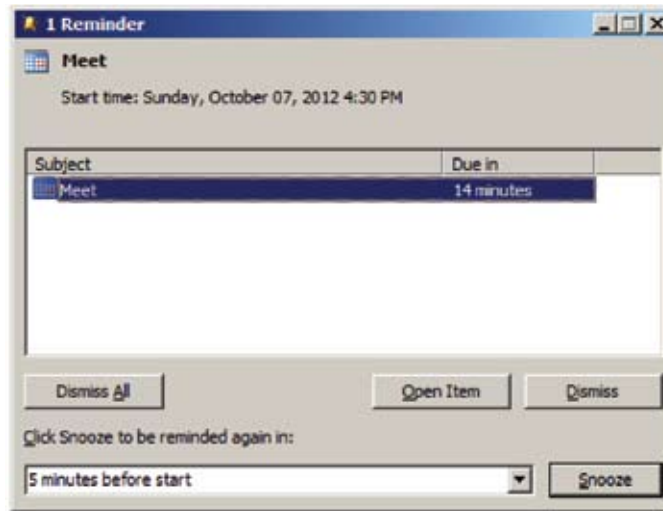
Figure 10

You can create appointments on a daily, weekly, monthly or yearly basis. You can create recurring appointments, for example, you create your breakfast schedule everyday between 7:30 to 8:00 AM. To do so, right-click on the calendar and click *New Recurring Appointment.*
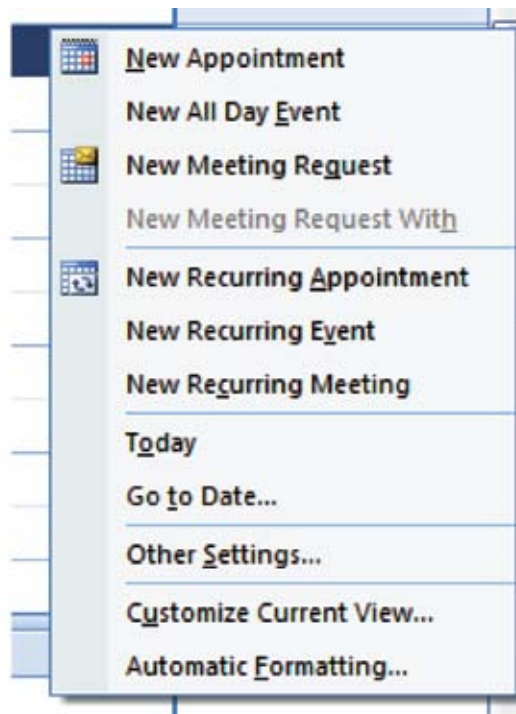

Figure 11

An *Appointment Recurrence* window appears. You can specify the appointment time, recurrence pattern and the range of recurrence here.

Figure 12

Enter a recurring event, select multiple days and click **OK.**

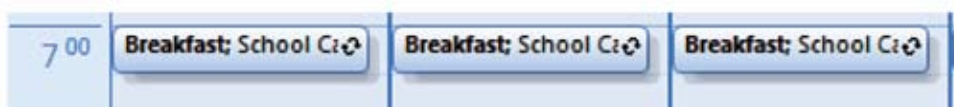Recurring appointments appear on the calendar as a daily activity as displayed below.

Figure 13

EXERCISE

Perform the following activities till you are confident:

S.No.	Activities
1.	Schedule a onetime and a recurring appointment
2.	Create appointments for the following items: 1. Daily class schedule. 2. Exam schedule. 3. Exam preparation schedule. 4. Visit to Circus (One time activity). 5. Parent / Teacher Meeting (Monthly activity). 6. Visit to a book store (One time activity). 7. Vaccine Schedule (Yearly activity). Save the appointments, you will use them in the next exercise.

ASSESSMENT

Fill in the blanks:

1. The two ways to schedule an appointment are: _____ & _____.

2. Calendar software prompts with an _____ based on entries scheduled in the calendar.

3. _____ appointments can be used for scheduling repetitive tasks.

SESSION 3: CATEGORIZE AN APPOINTMENT

Relevant Knowledge

You can categorize the appointments in time management software by giving the specific colors to the appointments. For example, you can use green color for all school related activities and blue for all personal activities. Using Calendar you can name colors (and change the names when you want to). You use colors to make specific entries stand out at a glance and catch your eye. In this exercise, you will learn to categorize appointments.

You can either categorize the appointments at the time of creation of the appointment or categorize after creating the appointment.

To use a category while creating an appointment, select a color from the **Categorize** dropdown list (figure above). To apply category for an existing appointment, double-click on the appointment and select a color from the **Categorize** dropdown list.
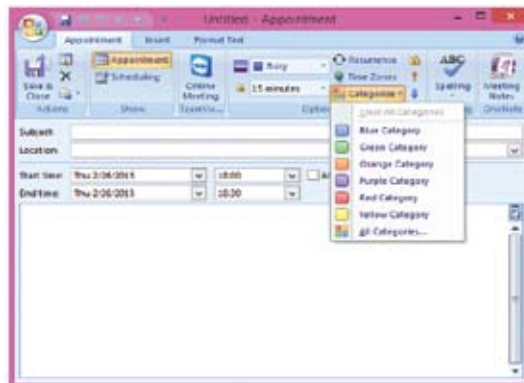

Figure 14

You can name all the categories. A sample has been shown below:

Figure 15

EXERCISE

Perform the following activity till you are confident:

S.No.	Activity
1.	Create appointments with different categories and apply categories to existing appointments created in the previous exercise. Also, try to rename a named category and to remove a category you have created.

ASSESSMENT

Fill in the blanks:

1. You can categorize appointments in time management software by giving specific _____ to appointments.

2. Some of the categories in the time management software are:

   a) _____

   b) _____

   c) _____

   d) _____

   e) _____

   f) _____

SESSION 4: SHARE A CALENDAR

Relevant Knowledge

You can also share your calendar with someone else by sending the calendar to the concerned person's email id. The question that comes to the mind is why should I? Sharing your calendar helps to share various segments of your time-centric life with your spouse, family, and others. You are able to receive time-centric news and updates from trusted providers. Calendar sharing is the last frontier for true collaboration and social networking. Moreover, you can create calendar folders and choose specific folders to share. For example, you can create a calendar folder for a particular project and share it with your co-workers. You can also grant them permission to modify the events and appointments in the calendar.

In this exercise, you will learn to share a copy of your calendar in an email message using email server. The calendar will be uploaded to the mail server and can be accessed by others using their email id.

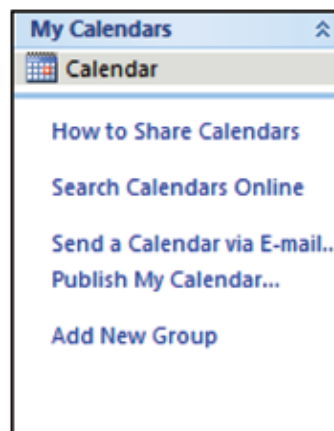Click on **Publish My Calendar**… option available in the Navigation Pane of the Calendar as shown below.

Figure 16

Note: In order to upload your calendar to the mail server, you must have an email account in Microsoft Mailing service. Click **Sign in,** to login with your account, if you having one; otherwise create an email account by selecting **click here to sign up for a free account** available in the window. Enter your email ID and password and click Sign in. The following window appears:

Figure 17

Click *Finish* to publish the calendar on the mail server. The following dialog box appears:
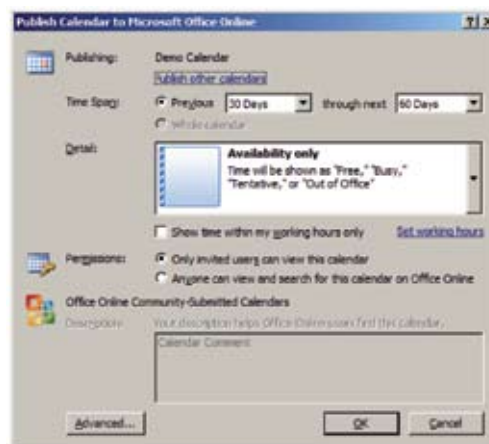

Figure 18

Select the time span in the calendar to be shared by selecting the drop down values. You can configure what details are to be shared with others using the *Detail* list and *Permissions* options. After specifying necessary details, click *OK.* The following dialog box appears as shown below.

Figure 19

You are asked to enter your email account details to publish the calendar.

Once you enter all the details, click **OK.** Once you click **OK** the following message box appears.

Figure 20

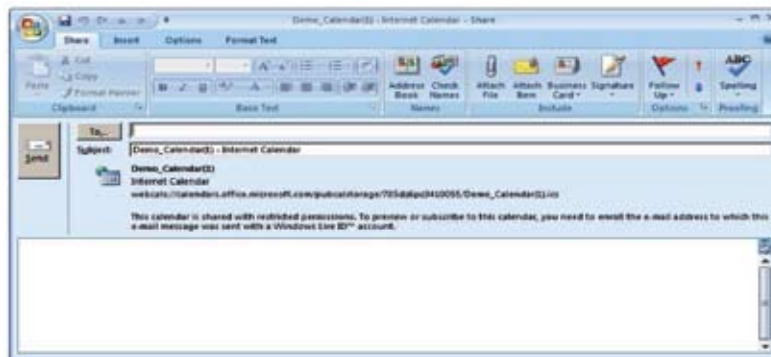To send the invitation, click <u>Y</u>es. The *Calendar - Share* window appears.

Figure 21

Enter the email accounts to whom you would like to share the calendar with and click <u>Send</u> and the invitation will be sent to their email accounts.

When others sign in into their mail accounts, the following message will be displayed to the recipients.
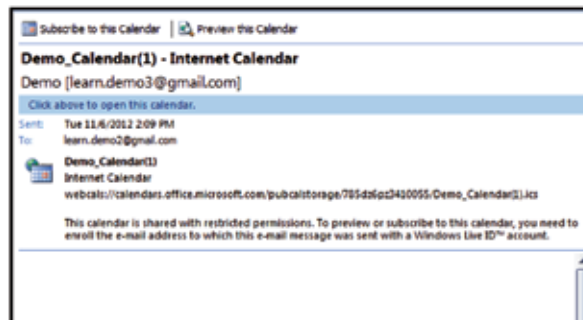

Figure 22

To view the shared calendar, the recipients have to click on *Subscribe to this Calendar* option available at the top of the message. The following dialog box appears:
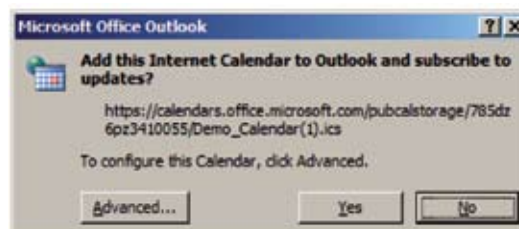

Figure 23

Click **Yes** to subscribe to the shared calendar. Once you click **Yes,** the recipients will be displayed with a window similar to the one below to enter their account details.

Figure 24

Once the authentication is complete, the calendar will be downloaded and made available on their calendar program.
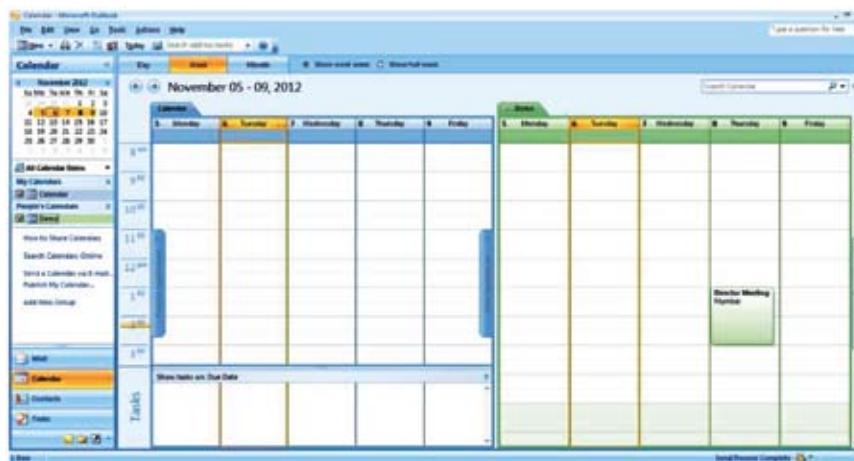

Figure 25

Now other users can view your calendar.

You can also send a copy of your calendar to other users as a standard email message. The calendar will be displayed as an attachment to the recipients in the email. To do so, click on **Send a Calendar via E-mail** option available in the Navigation Pane of the Calendar as shown below.
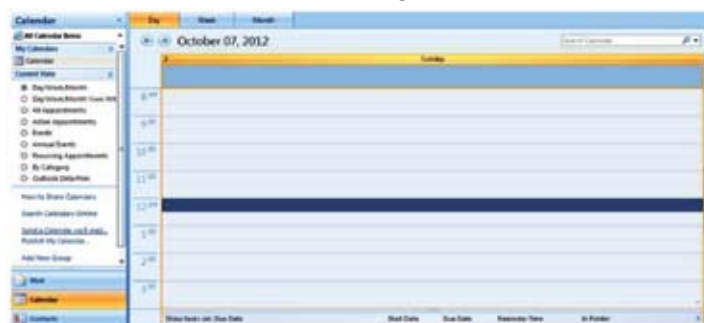

Figure 26

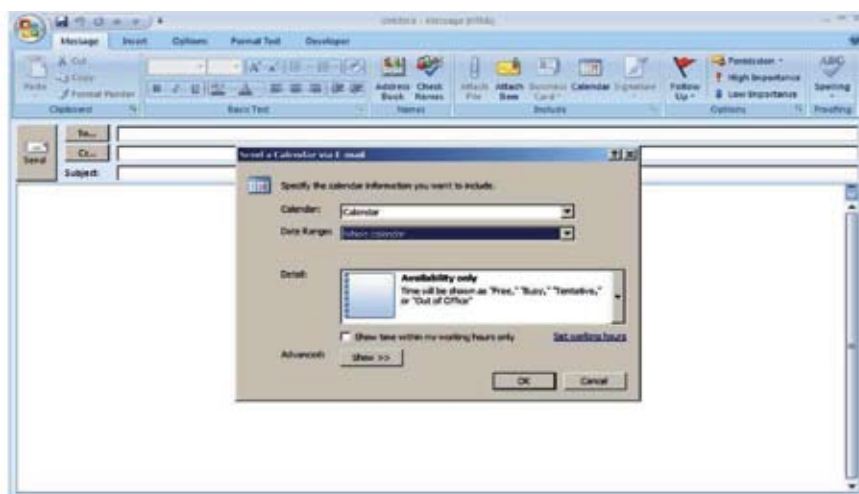The **Send a Calendar via E-mail** dialog box appears.

Figure 27

You can send either the entire calendar or particular week or day in the calendar by selecting the appropriate option and click **OK.**

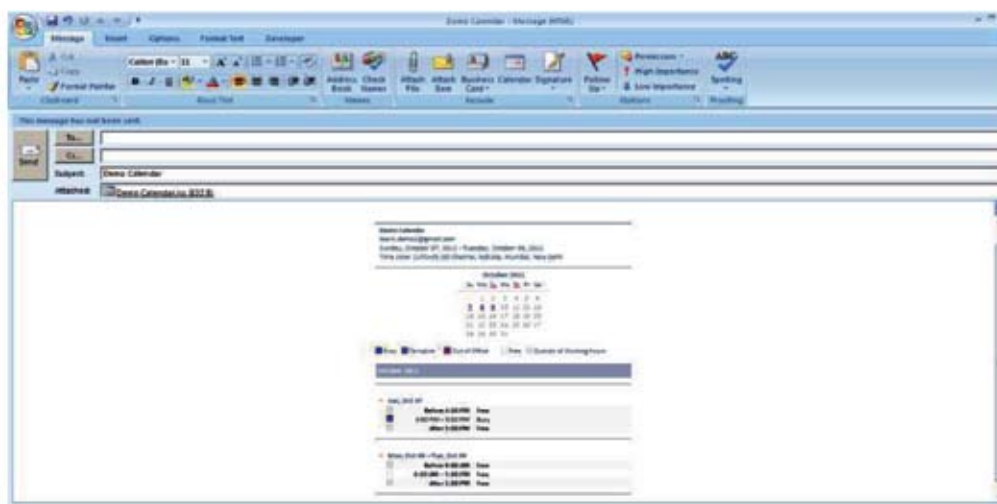**Figure 28**

You can specify the address of the user to whom you want to share the calendar and click Send to *send* the calendar to the person.

EXERCISE

Perform the following activities till you are confident:

S.No.	Activities
1.	Share the calendar you have created in the previous sessions with your classmates using both the methods you have learnt in this exercise.

ASSESSMENT

Fill in the blanks:

1. _____ your calendar helps to share various segments of your time-centric life with your spouse, family, and others.

2. _____ is the last frontier for true collaboration and social networking.

3. To share a calendar you have to select _____ option available in the Navigation Pane.

SESSION 5: PRINT A CALENDAR

Relevant Knowledge

You can print the calendar and keep it for reference. This might be useful in situations when you don't have access to a computer. In this exercise, you will learn to print a calendar.

Go to **File** > **Print,** the **Print** dialog box appears.

Figure 29

Select the range of the calendar by specifying the dates that you need to be printed and click **OK.**

Now try printing using different styles (Daily, Weekly, and Monthly) available in the **Print style** box (figure above).

To print the details of private appointments, uncheck the **Hide details of private appointments** check box.

To print non-adjacent days, change to Week or Month view and then select the days you want to print, and then click **File > Print.**

EXERCISE

Perform the following activities till you are confident:

S.No.	Activities
1.	Print a calendar using options in the print dialogue box. You may opt for either the daily, monthly or weekly style as per your choice.

ASSESSMENT

Fill in the blanks:

1. Print option is available under _____ menu.

2. To print the details of private appointments you have to uncheck _____ checkbox.

SESSION 6: CREATING A MEETING REQUEST

Relevant Knowledge

A meeting is an appointment to which you invite people or reserve resources for (meeting hall, equipment etc.). You can create and send meeting requests and reserve resources for face-to-face meetings or for online meetings. To create a meeting, you identify the people to be invited, the resources to be reserved and pick a meeting time. Responses to your meeting request appear in your Inbox. You can also add people to an existing meeting or reschedule a meeting if the schedule is not convenient. In this exercise, you will learn to create a meeting request. You can schedule a meeting request using email application software.

Go to *File > New > Meeting Request,* the following window will be displayed:
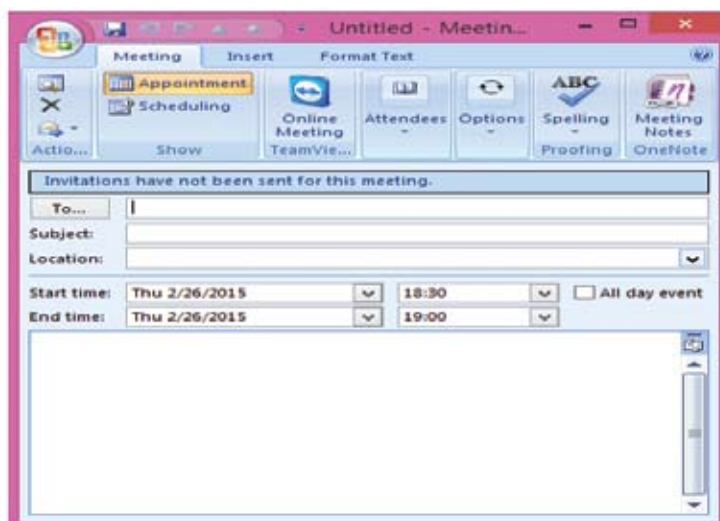

Figure 30

You can send the meeting details to another user by setting the Subject, Location and Timings of the meeting in the window shown above.

Click **Send.**

EXERCISE

Perform the following activities till you are confident:

S.No.	Activities
1.	Create meeting request for the following items: 1. School Annual Day function discussion. 2. Blood donation camp discussion

ASSESSMENT

Fill in the blanks:

1. A _____ is an appointment to which you invite people or reserve resources.

2. You can specify _____, _____ & _____ while sending a meeting request.

SESSION 7: RESPOND TO A MEETING REQUEST

Relevant Knowledge

Calendar software allows the user to respond to other users meeting requests. In this exercise, you will learn to respond to a meeting request.

Open the email application to view the request. To respond, select *Accept, Tentative, Decline* or *Propose New Time* options (figure below)
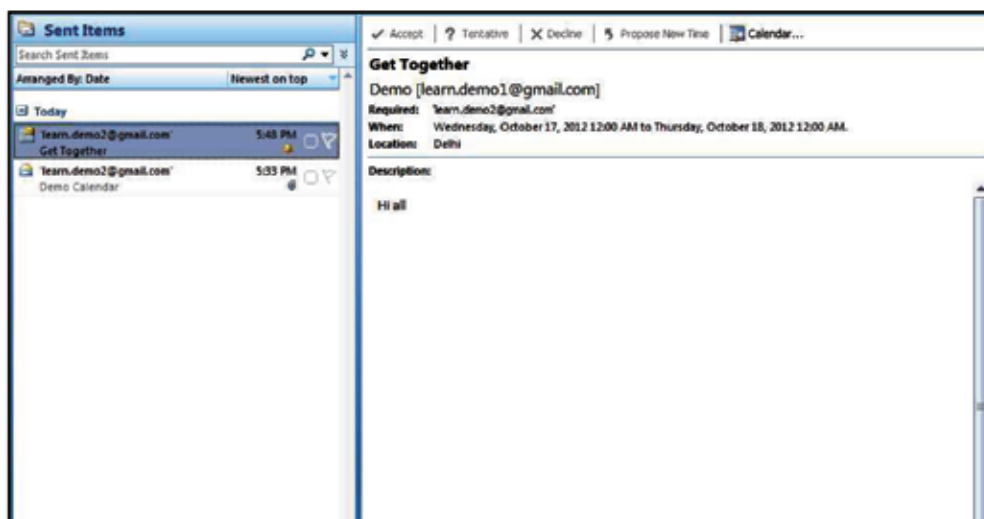

Figure 31

Figure 32

As a meeting attendee, you can propose an alternative meeting time. However, the meeting organizer must accept the new time. Meeting organizers can send meeting requests that restrict the ability to propose alternate meeting times. If the meeting organizer has restricted meeting proposals, the *Propose New Time* command is not available. By default, when you propose a new time, you tentatively accept the meeting. However, if you click the text *Propose New Time,* you have the additional options to click *Tentative and Propose New Time* or *Decline and Propose New Time.*

EXERCISE

Perform the following activities till you are confident:

S.No.	Activities
1.	Respond to the meeting requests sent by one of your classmates using mentioned procedure you have learnt today.

2.	Respond to requests from other classmates using options such as Accept, Tentative, etc. and observe the results sent to your mail.

ASSESSMENT

Fill in the blanks:

1. Calendar software allows the user to _____ to other users meeting requests.

2. Responses to your meeting request appear in your _____.

3. Some of the response options for meeting request are _____,_____,_____ & _____ .

4. You have received a meeting request for which the schedule is not convenient to you; however you would like to reschedule this meeting. Which option should be used when responding to this meeting request? _____

SESSION 8: CREATE AND EDIT A TASK

Relevant Knowledge

Tasks refers to actions that can be performed by an user; tasks may include action items such as booking a conference room, booking tickets, reminder for a task completion itself, etc. In this exercise, you will learn to create and edit a task.

You can create tasks in email calendar application software.

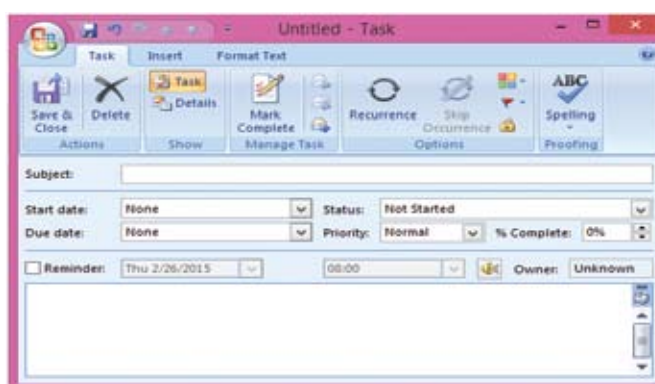Go to *File* > *New* > *Task,* a *Task* window will be displayed as shown below.

Figure 33

Here you can define a subject name for the task; the start date and end date of the task; the status of the task and the priority of the task. Once you have given the entire details click **Save & Close** at the top of the page. A window is displayed as shown below.
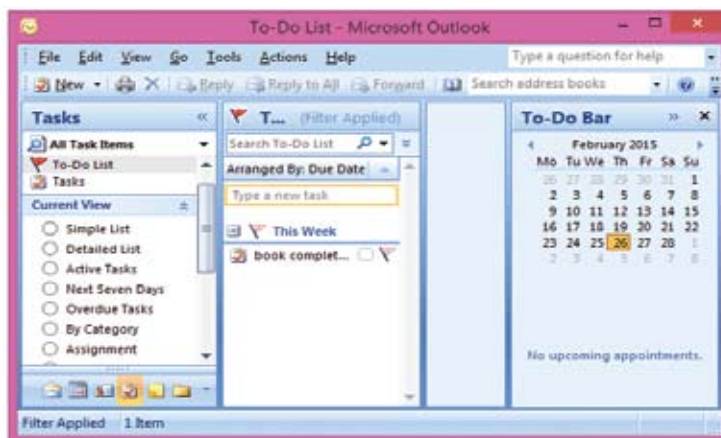

Figure 34

You can also the edit the task by double clicking the task name available in the email application software.

EXERCISE

Perform the following activities till you are confident:

S.No.	Activities
1.	Create a new task
2.	Edit an existing task

ASSESSMENT

Fill in the blanks:

1. _____ refers to actions that can be performed by a user.

2. While creating a task you can define_____ , _____, _____, _____ & _____ of a task.

SESSION 9: CREATE AND EDIT A NOTE

Relevant Knowledge

Notes are short text messages that can be used for taking quick notes. You can create notes in the calendar software. In this exercise, you will learn to create and edit a note.

Go to *File > New > Note,* a window will be displayed as shown below.

10/7/2012 6:42 PM

Figure 35

You can type the content of the note and click the ▨ icon. Once you click the ▨ icon, a dropdown list appears as shown below.

New Note
Save As...
Delete
Forward
Cut
Copy
Paste
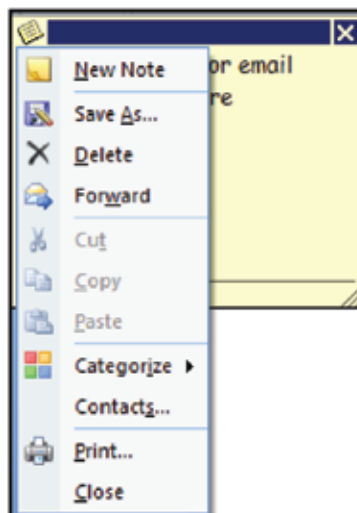Categorize ▶
Contacts...
Print...
Close

Figure 36

To view the notes that you have created, click **Notes** in the calendar application. If you would like to edit the note, double-click on it and edit as required.

EXERCISE

Perform the following activities till you are confident:

S.No.	Activities
1.	Create a note
2.	Edit a note
3.	Create note for the following items: 1. Grocery list. 2. Books to buy list.

ASSESSMENT

Fill in the blanks:

1. _____ are short text messages that can be used for taking quick notes.

2. To view the list of notes you select the _____ option in the Calendar application.

SESSION 10: CREATE AND EDIT A JOURNAL ENTRY

Relevant Knowledge

Journal entry creates a timeline of transactions that can be linked to a contact. A transaction might be an email, task, appointment etc. The following activities can be automatically recorded:

- Emails Sent & Received
- Telephone calls
- Meeting requests & responses
- Office documents you manage

By automatically recording all documents you work on, email sent to specific contacts, and phone calls made, the journal logs all your activity. This is very useful when you needs to know how long you worked on a document or spent on a phone call because the journal tracks the elapsed time along with the event; or when a manager might want to know the number of calls made or email sent by the team members or track the number of documents created per hour.

In this exercise, you will learn to work with journal entries.

If you would like to track the usage of an application such as Microsoft Word, go to **Tools > Options,** a dialog box will be displayed as shown below.

Figure 37

Click on **Journal Options** button.

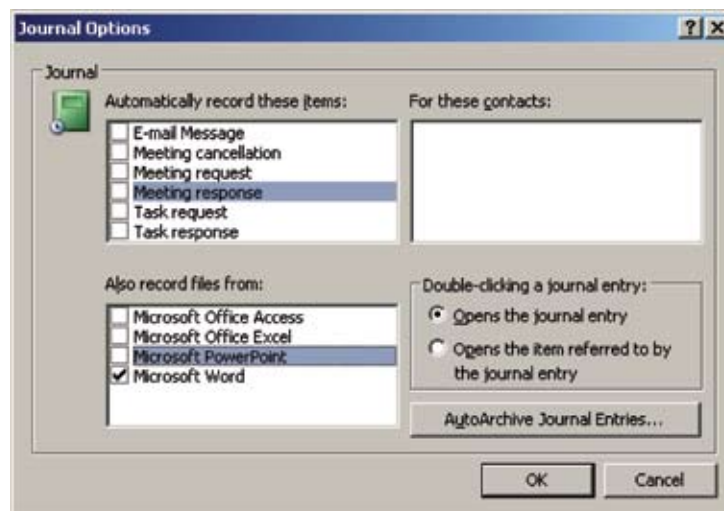Once you click the button, a dialog box will be displayed as shown below.

Figure 38

Check **Microsoft Word** under **Also record files from** Section and Click **OK.** Close the time management software.

Now open the word processing software, create a document and save it. Close the Word Processing software. Open the time management software.

Select **Go > Journals.**

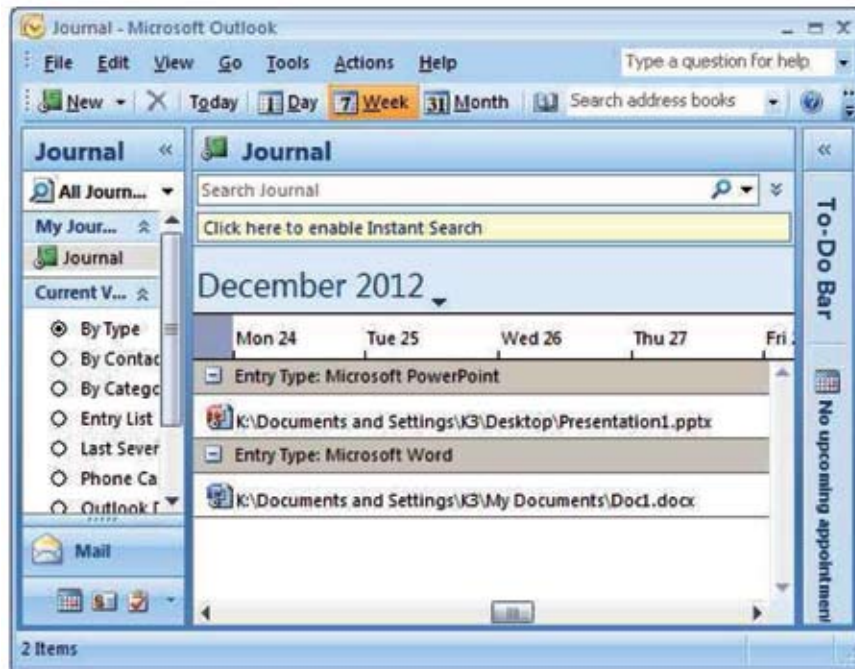Following window will be displayed:

Figure 39

Notice the document that you created earlier is listed. You can edit the journal entry by double-clicking the entry or by right-clicking the entry and selecting **Open Journal Entry.**
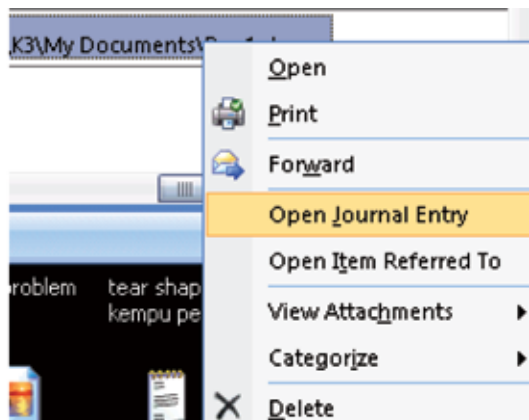

Figure 40

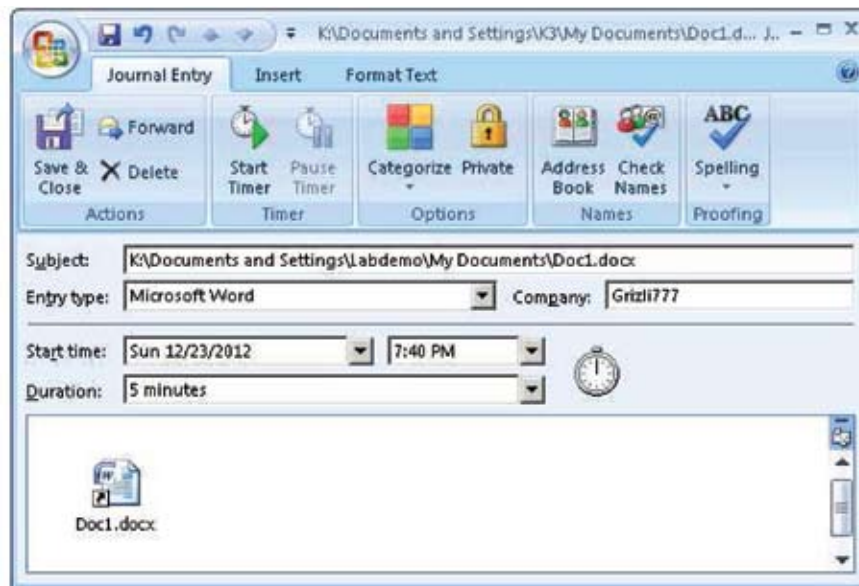A window similar to the one below will be displayed:

Figure 41

Notice the following items that are displayed:

- Document file name and path
- Created time and date
- Duration (Amount of time spent on that document)
- Shortcut to the document itself! (Double-clicking the shortcut will open the document)

Similarly if you would like to track emails send to your contacts, Go to **Tools > Options.** Click on **Journal Options** button.
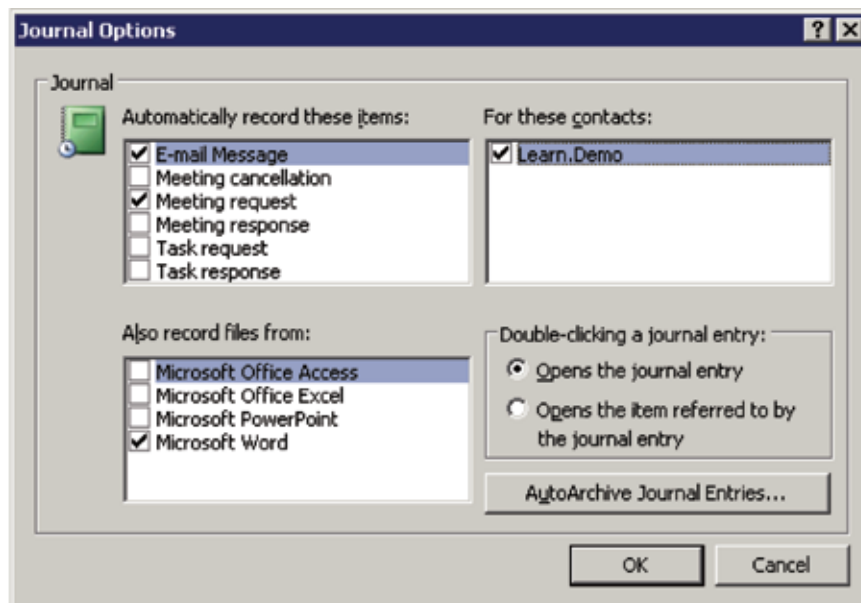

Figure 42

Under **For these contacts:** section, select the contacts that you wish to track by placing a check against each contact. Click **OK.**

Note: The contacts added in the calendar application will be visible here.

Now send mail to the contacts (selected in the previous step). Once you have completed sending the mails, Click **Go > Journals.** A window similar to the one will be displayed.

Figure 43

Notice the mail entries (sent & received) displayed. Right-click on the entry and select **Open Journal Entry.**
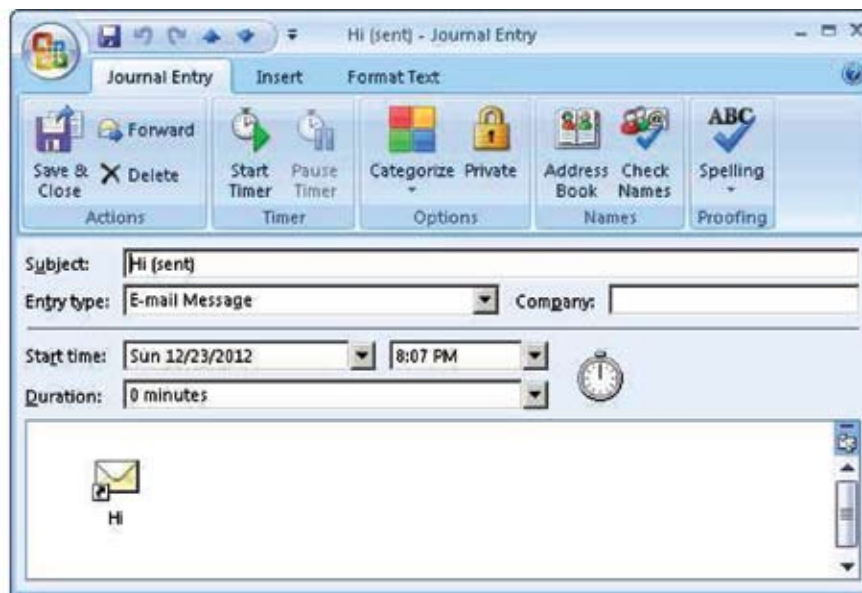

Figure 44

Notice the following items that are displayed:

• Mail Subject

• Timestamp (time and date)

• Shortcut to the mail itself! (Double-clicking the shortcut will open the mail)

Now that you have learnt to work with Journal, work with different other options such as task requests, meeting requests, etc. and observe the tracking in the time management software.

EXERCISE

Perform the following activities till you are confident:

S.No.	Activities
1.	Create a new journal entry
2.	Edit an existing journal entry

ASSESSMENT

Fill in the blanks:

1. _____ creates a timeline of transactions that can be linked to a contact.

2. _____, _____, _____, _____ are some of the items that can be automatically recorded by the Calendar Software.